

# Event-preparation and invitation- smicroSuite

In order to add users to the system, first name, last name and email addresses of the participants need to be collected in advance. Add them to an Excel document. If possible, directly to the smicroSuite template for events. (see step 8)

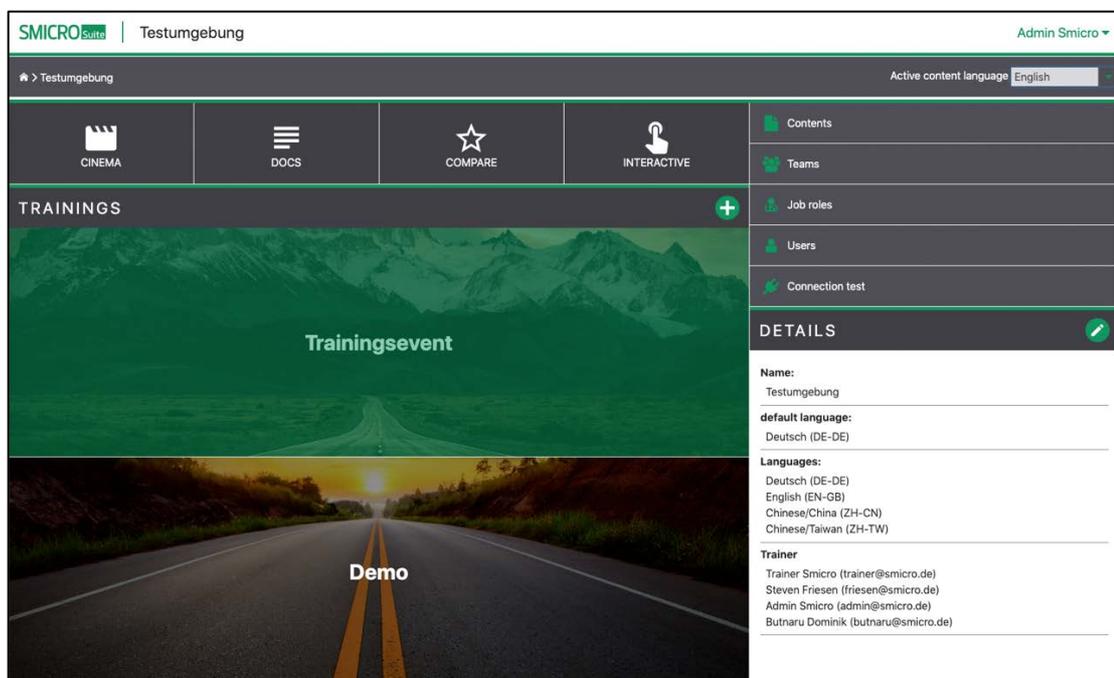
## 1. Login to the smicroSuite backend

If the password is not available anymore, you can use the forgot password process to reset your password.



## 2. Select training

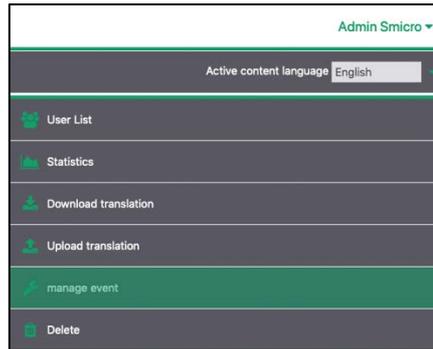
Select the training you want to manage an event for.



## 3. Go to „manage event“

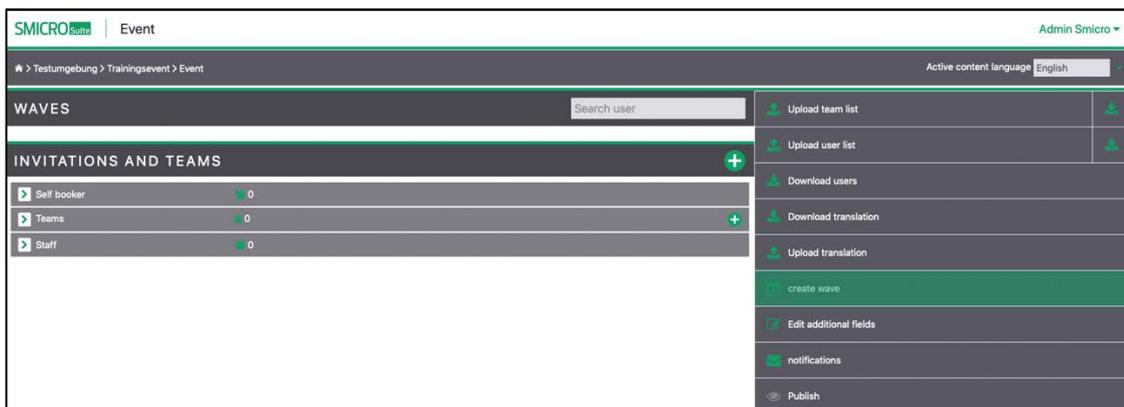
Eventer who do not have trainer rights, will automatically get to step 4 after selecting the training.

As a trainer, click on „manage event“ in the right menu to get to the event management screen.

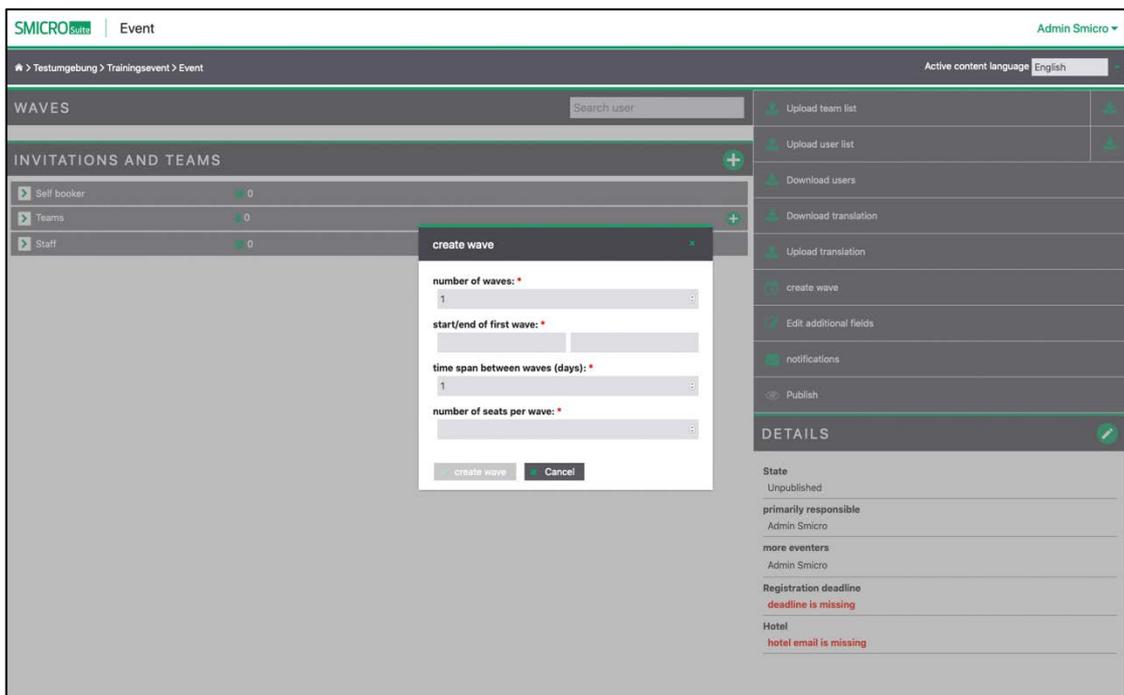


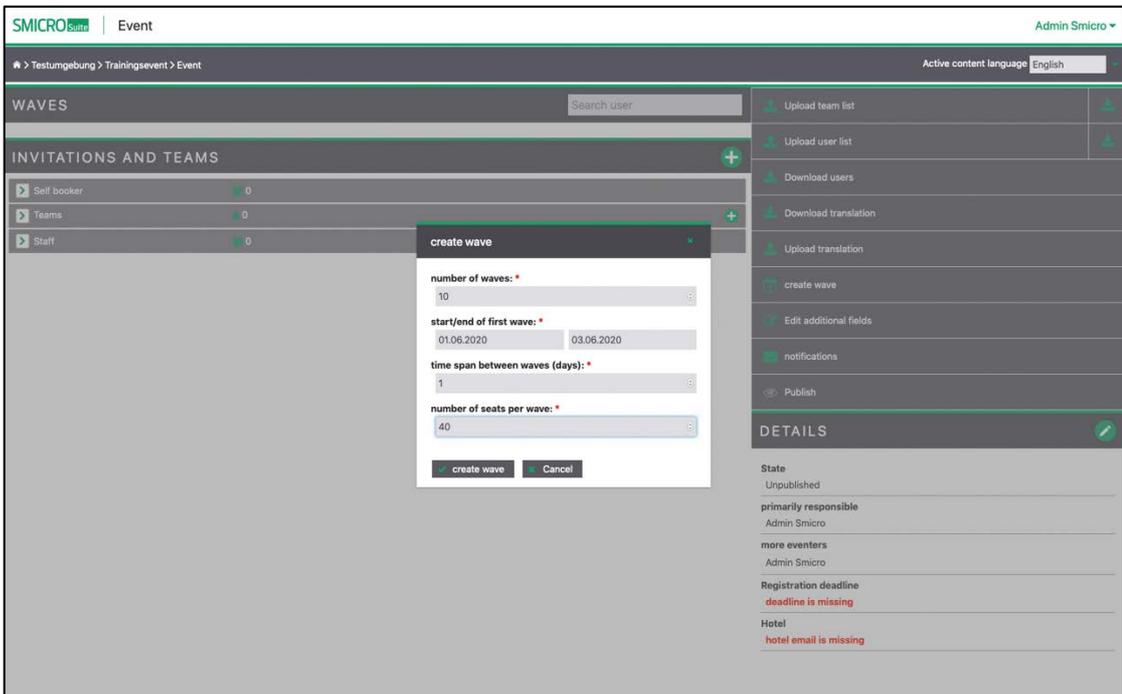
#### 4. Create waves

Click on „create waves“.



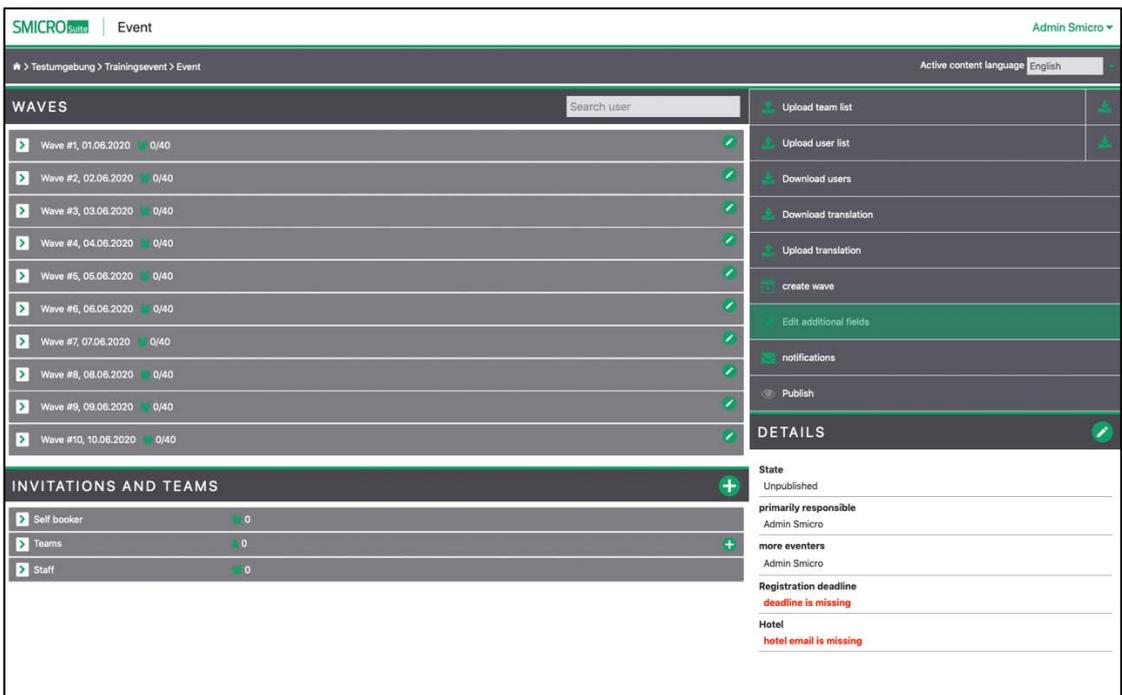
In the popup, select the number of waves, start date, end date, how many days the starting dates have in between each other and the maximum number of participants for a wave.





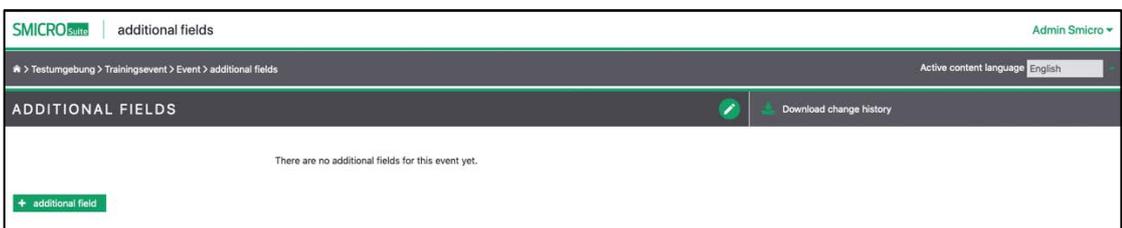
## 5. Add additional fields

Click on “edit additional fields” in the right menu.

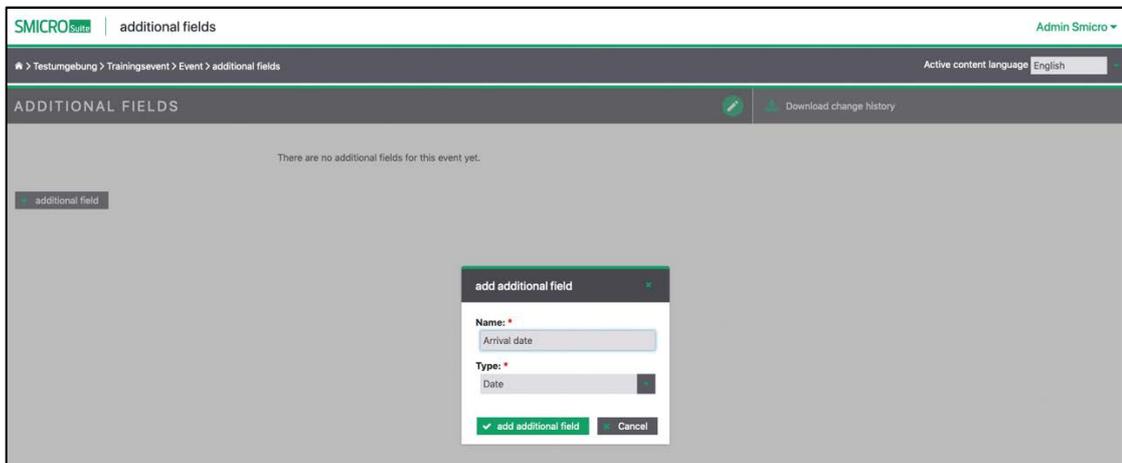
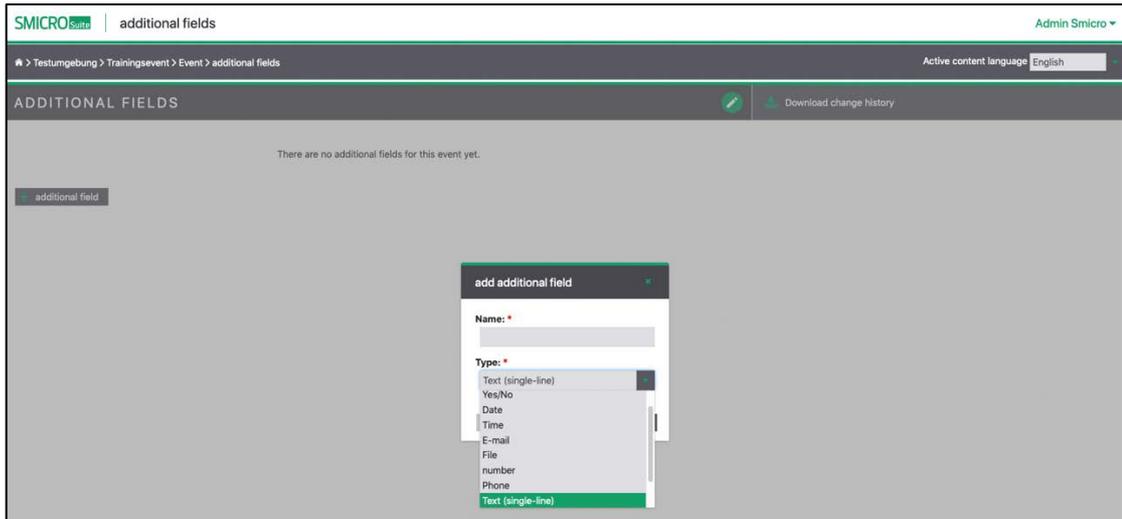


Additional fields are used to collect information from the participants of the event like arrival date and time, allergies, etc.

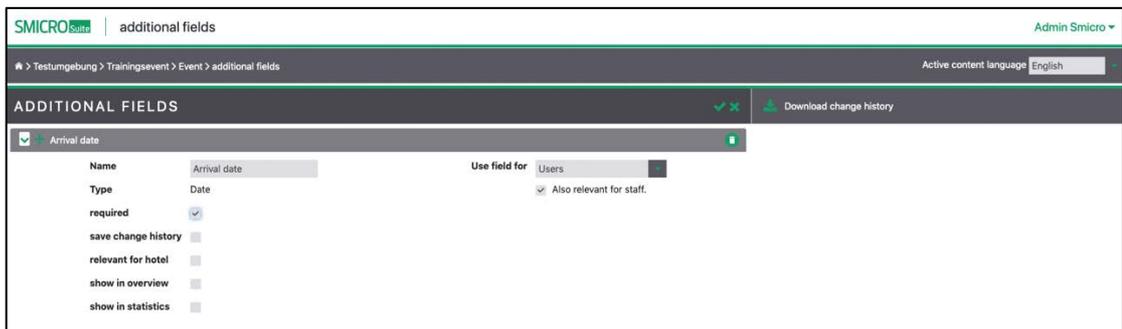
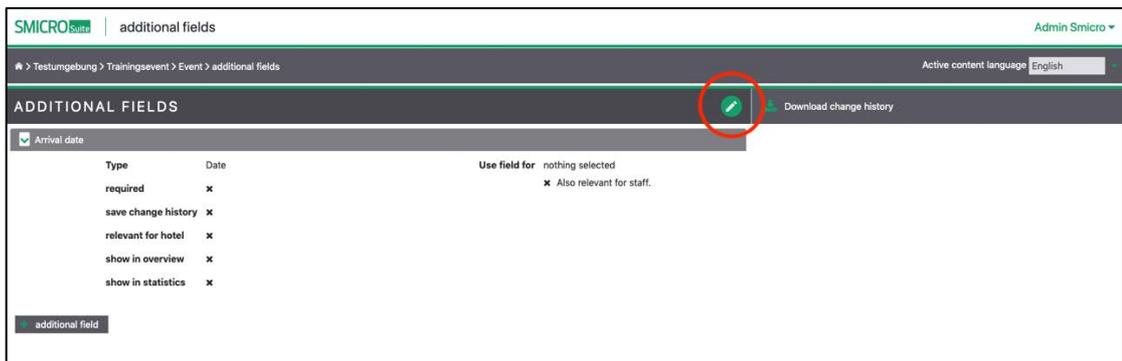
Click on “+ additional field” in order to create a new field.



Then use name and the dropdown to build your needed form for the participants to fill out.



Once all the fields are created, use the green pen in the upper right corner to edit the additional fields.



In edit mode you can rename the field. In addition, please decide on the attributes:

- required: Do the participants have to fill out the field or is it optional?
- Save change history: Does the system need to document every change of this field in the history?
- Relevant for hotel: Will changes to this field be collected and sent via email to the hotel?
- Show in overview: Will the field be shown next to the user's name in the event overview after complete booking? (event screen)
- Show in statistics: Is this field relevant for the export document?
- Use field for: Who will see this field? The participants ("users") or "only eventers"?
- Also relevant for staff: Will this field in addition be shown for staff members or only the participants?

Save the changes using the green check mark.

## 6. Edit notifications (optional)

The system will send out notifications to the participants based on certain actions.

State	Action initiated by			Recipient				
	Eventer	Team Lead	Participant	Participant	Team Lead	Staff	Eventer	Hotel
Published	Event gets published.			Self Booker (No wave assigned): Invitation to the event  Any participant who has been assigned to a wave before publishing: 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. 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: Booking of event completed  Self booker who have not chosen a wave: 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: Hotel data updated
Published or booking complete		Registration deadline expired:		Reminder to enter data after exceeded deadline	Reminder to enter data: Team lead	Reminder to enter data: Staff		

The notifications can be changed in every language if required.

Click on "notifications" in the right menu.

SMICRO Sub | Event Admin Smicro

# > Testumgebung > Trainingsevent > Event Active content language English

### WAVES

Search user

▶ Wave #1, 01.08.2020	0/40	✓
▶ Wave #2, 02.08.2020	0/40	✓
▶ Wave #3, 03.08.2020	0/40	✓
▶ Wave #4, 04.08.2020	0/40	✓
▶ Wave #5, 05.08.2020	0/40	✓
▶ Wave #6, 06.08.2020	0/40	✓
▶ Wave #7, 07.08.2020	0/40	✓
▶ Wave #8, 08.08.2020	0/40	✓
▶ Wave #9, 09.08.2020	0/40	✓
▶ Wave #10, 10.08.2020	0/40	✓

### INVITATIONS AND TEAMS

▶ Self booker	0	+
▶ Teams	0	+
▶ Staff	0	

- Upload team list
- Upload user list
- Download users
- Download translation
- Upload translation
- create wave
- Edit additional fields
- notifications
- Publish

### DETAILS

**State**  
Unpublished

**primarily responsible**  
Admin Smicro

**more eventers**  
Admin Smicro

**Registration deadline**  
deadline is missing

**Hotel**  
hotel email is missing

SMICRO Sub | automatic templates Admin Smicro

# > Testumgebung > Trainingsevent > Event > notifications > automatic templates Active content language English

### AUTOMATIC TEMPLATES

▶ Participant notification: Booked	✓
▶ Teamlead notification: Contingent was changed	✓
▶ Teamlead notification: Self booker	✓
▶ Teamlead notification: Booking of event completed	✓
▶ Prio A notifications: waiting list.	✓
▶ Reminder to enter data: Staff	✓
▶ Reminder to enter data after exceeded deadline.	✓
▶ Staff notification	✓
▶ Hotel data updated	✓
▶ Reminder to enter data: Teamlead	✓
▶ Teamlead notification: Waiting List	✓
▶ Prio A: Successful Booking.	✓
▶ Notification Eventer: for changed participants' data	✓
▶ Booking of event completed.	✓
▶ Wave assigned after booking has been completed	✓
▶ Updating the wave of a participant.	✓
▶ Event booking completed (participants without wave)	✓
▶ Teamlead notification: Start booking	✓
▶ Prio B notifications: waiting list	✓
▶ Invitation to the event	✓

- manual / planned notifications
- Sent notifications

### DETAILS

Select the green arrow on the left in order to see the text behind the notification.

SMICRO Suite | automatic templates Admin Smicro

» Testumgebung » Trainingsevent » Event » notifications » automatic templates Active content language English

- ▶ Prio A: Successful Booking. ✓
- ▶ Notification Eventer for changed participants' data ✓
- ▶ Booking of event completed. ✓
- ▶ Wave assigned after booking has been completed ✓
- ▶ Updating the wave of a participant. ✓
- ▶ Event booking completed (participants without wave) ✓
- ▶ Teamlead notification: Start booking ✓
- ▶ Prio B notifications: waiting list ✓
- ▶ Invitation to the event. ✓

Email reminds the participants that they are invited to an event and is sent when an event has been published.

**to** Type: User  
prio: All  
Wave: All

**Subject** You have been invited to the event [% event.name %]

**Text** Dear [% user.firstname %] [% user.lastname %],  
  
You have been invited to the event [% event.name %]. Please search for an appointment in the smicroSuite app and update your data by [% event.deadline %].  
  
Link to the app:  
[% app.link\_student %]  
  
If you have logged into the app for the first time, you will receive a link for setting your password at the same time as this email.  
  
Kind regards  
Your event organization team

- ▶ Teamlead notification: Booked ✓
- ▶ Teamlead notification: Booking state changed ✓
- ▶ Team member notification: Waiting ✓

Then use the pen in order to edit the template.

SMICRO Suite | automatic templates Admin Smicro

» Testumgebung » Trainingsevent » Event » notifications » automatic templates Active content language English

- ▶ Prio A: Successful Booking. ✓
- ▶ Notification Eventer for changed participants' data ✓
- ▶ Booking of event completed. ✓
- ▶ Wave assigned after booking has been completed ✓
- ▶ Updating the wave of a participant. ✓
- ▶ Event booking completed (participants without wave) ✓
- ▶ Teamlead notification: Start booking ✓
- ▶ Prio B notifications: waiting list ✓
- ▶ Invitation to the event. ✕

Email reminds the participants that they are invited to an event and is sent when an event has been published.

**to** Type: User  
prio: All  
Wave: All

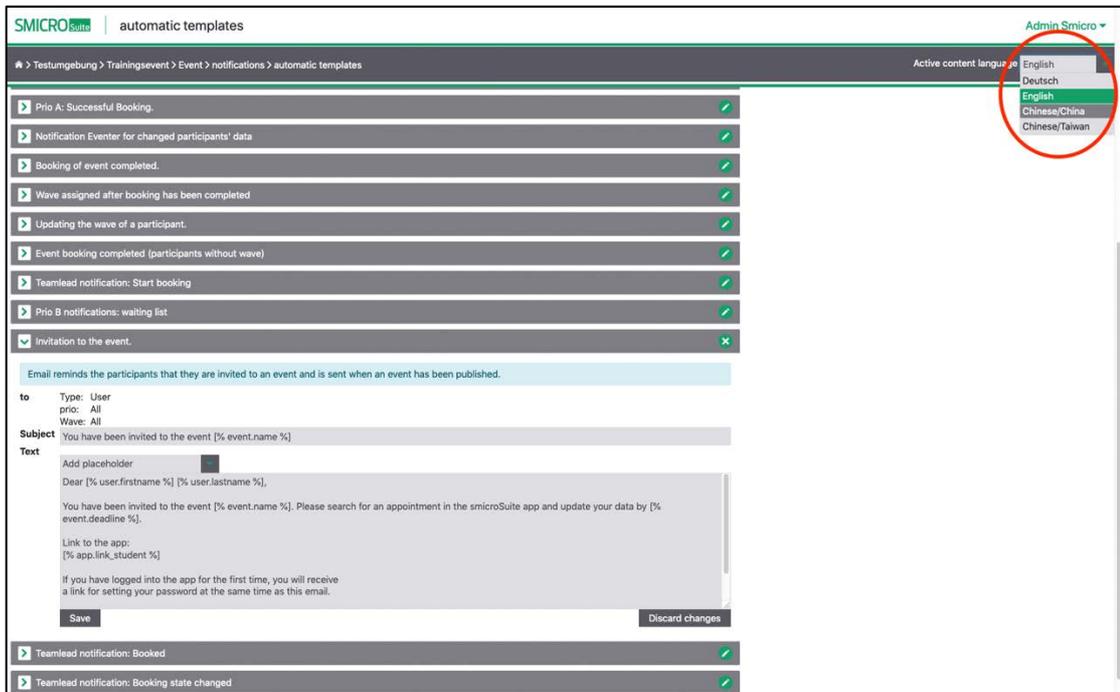
**Subject** You have been invited to the event [% event.name %]

**Text** Add placeholder  
Dear [% user.firstname %] [% user.lastname %],  
  
You have been invited to the event [% event.name %]. Please search for an appointment in the smicroSuite app and update your data by [% event.deadline %].  
  
Link to the app:  
[% app.link\_student %]  
  
If you have logged into the app for the first time, you will receive a link for setting your password at the same time as this email.

Save Discard changes

- ▶ Teamlead notification: Booked ✓
- ▶ Teamlead notification: Booking state changed ✓

Change the language in the upper right corner in order to see the text in another available language.



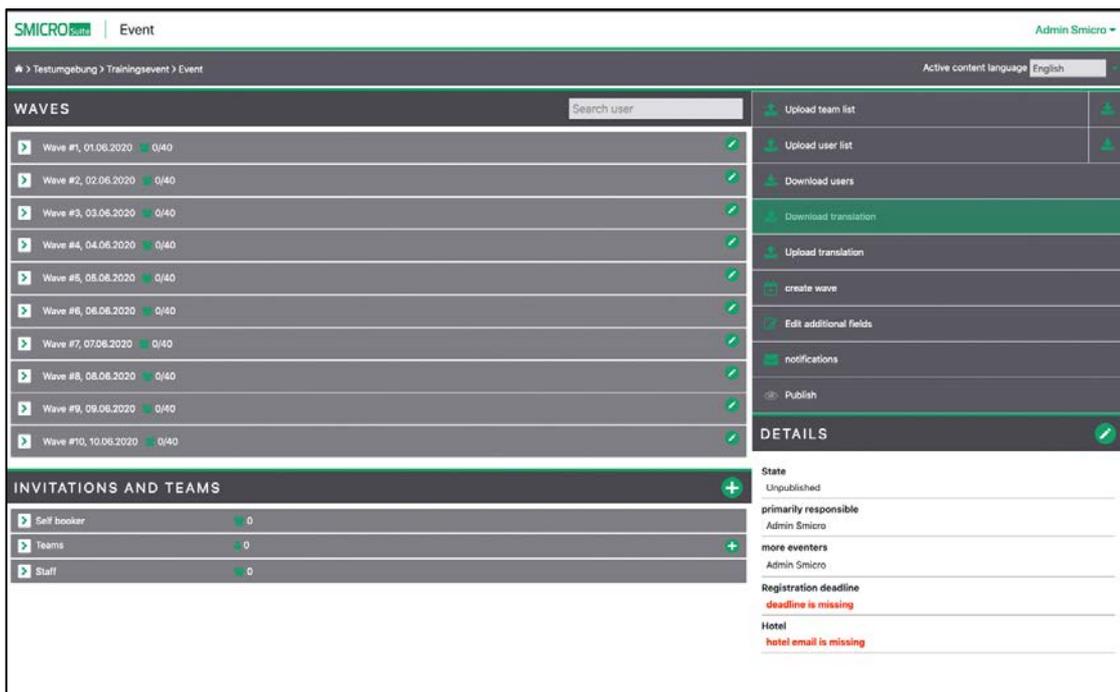
Make sure to save changes. This process is quick for when only a few templates need to be adjusted. See step 7 for changing templates in bulk.

## 7. Translate email templates and additional fields (optional)

When creating additional fields, they will be created in the language selected at the time. You might want to translate them into all the languages available in your organization.

Also, the translation process can be used to change multiple email templates in an easy way without using the user interface.

Click “download translation” in the right menu to download an Excel document containing all the additional fields and email templates.



In the Excel document you can find all the translatable strings and texts. The column indicates what language the content already exists in. e.g. de-DE is German, en-GB is British English.

Here is an example of a row containing the email template texts in all languages and one row containing the additional field “arrival date” which was created in English only in step 5.

A	B	C	D	E	F	G	H	I	
1	translation_id	parent_type	parent_field	content_type	parent_id	de-DE	en-GB	zh-CN	zh-TW
2	2925	EmailTemplate	body_tid	event_publish_participant	292	<p>Sehr geehrte(r) [% user.firstname %] [% user.lastname %],</p> <p>Du bist zum Event [% event.name %] eingeladen. Bitte suche Dir einen Termin in der smicroSuite App aus und pflege bis zum [% event.deadline %] Deine Daten.</p> <p>Link zur App: [% app.link_student %]</p> <p>Solltest Du Dich das erste mal in der App anmelden, dann erhältst Du zugleich zu dieser E-Mail einen Link, mit dem Du Dein Passwort setzen kannst.</p> <p>Viele Grüße Dein Event-Organisations-Team</p>	<p>Dear [% user.firstname %] [% user.lastname %],</p> <p>You have been invited to the event [% event.name %]. Please search for an appointment in the smicroSuite app and update your data by [% event.deadline %].</p> <p>Link to the app: [% app.link_student %]</p> <p>If you have logged into the app for the first time, you will receive a link for setting your password at the same time as this email.</p> <p>Kind regards Your event organization team</p>	<p>尊敬的 [% user.firstname %] [% user.lastname %]：</p> <p>你被邀請參加活動 [% event.name %]。請在 smicroSuite 應用程序中搜索你的預約并維護你的數據。直至 [% event.deadline %]。</p> <p>应用程序链接： [% app.link_student %]</p> <p>如果你是第一次在应用程序中报名，则你会同时从电子邮件收到通知。您将使用该链接设置密码。</p> <p>致以亲切的问候 活动组织团队</p>	<p>敬愛的 [% user.lastname %][% user.firstname %]：</p> <p>您已被邀請參加 [% event.name %] 活動。請在 smicroSuite App 中搜尋預約日期，並將您的資料保存至 [% event.deadline %]。</p> <p>App 連結： [% app.link_student %]</p> <p>如果您是第一次登入 App，則會同時從電子郵件收到連結。您可使用該連結設定密碼。</p> <p>祝您一切順心 您的活動組織團隊</p>
2	2032	Attribute	name_tid	date	7		Arrival date		

In order to translate the additional field, simply enter the translation in the respective column.

This document is an easy way to not only translate but also edit additional fields and templates.

When the file is ready, save and upload it into the system using the “upload translation” button:

## 8. Upload users

**PLEASE NOTE:** If any of the uploaded users has not been part of the system before, a registration email will be sent to the user’s email address. This email invites the user to confirm his email address and account and to set a password for the smicroSuite. It is NOT an invitation to the event, neither will the user see the event or training by taking this step. Users who already exist in the system, will not receive an email.

In order to add users to the event, you need to upload an Excel file, formatted in a specific way. Download the template for the import next to the button “upload users”.

The file has the following columns:

	A	B	C	D	E	F	G	H	I	J	K	L
1	email	firstname	lastname	type	language	jobroles_1	jobroles_2	jobroles_3	teams_1	teams_2	teams_3	teamlead
2	john.smith@smicro.de	John	Smith	a								
3				b								
4				staff								
5												
6												
7												

**Required:**

email: The participant’s email address

firstname: The participants first name

lastname: The participant’s last name

type: “a”-users will be able to choose a free wave once invited. Except they have been assigned to a specific wave beforehand by the eventer. (see step 9)

“b”-users will be able to choose a desired wave once invited, but will be set onto a waiting list, so the eventer can decide whether or not the user can participate in that wave. Except they have been assigned to a specific wave beforehand by the eventer. (see step 9)

Staff will be invited to the event and asked to enter their details (arrival date, etc.). They won’t be able to choose a wave, neither will they be able to access training material through the smicroSuite.

Language: The selected language will define the language of the user’s registration mail and user interface (if they are new to the system) and the event emails.

Optional: Job roles and teams can be interesting for inviting to an event, but not required if participants are addressed directly. For more information, please refer to the team invitations in the smicroSuite manual.

Fill in the template with all the participants and upload the file using the “upload users” button.

The screenshot shows the SMICRO Suite Event management interface. The top navigation bar includes 'SMICRO Suite | Event' and 'Admin Smicro'. The main content area is divided into two primary sections: 'WAVES' and 'INVITATIONS AND TEAMS'. The 'WAVES' section lists ten waves from 01.06.2020 to 10.06.2020, each with a '0/40' status and a green checkmark. The 'INVITATIONS AND TEAMS' section shows three categories: 'Self booker' (0), 'Teams' (0), and 'Staff' (0). On the right side, there is a sidebar with various actions like 'Upload team list', 'Upload user list', 'Download users', etc., and a 'DETAILS' section showing event state (Unpublished), primary responsible (Admin Smicro), and missing information like 'Registration deadline' and 'Hotel'.

## 9. Assign users to waves (optional)

Publishing the event (see step 10) will invite all the users to choose a free wave. In the frontend UI they will see an invitation. Following this invitation displays all available waves for them to pick, as well as a link to the form containing the fields created in step 5.

If it is required to plan the exact wave for every participant beforehand and prevent users to decide when they want to attend the event, the eventer or trainer must assign every participant to a wave.

This can be done by clicking “assign wave” next to the participant’s name and select one of the waves.

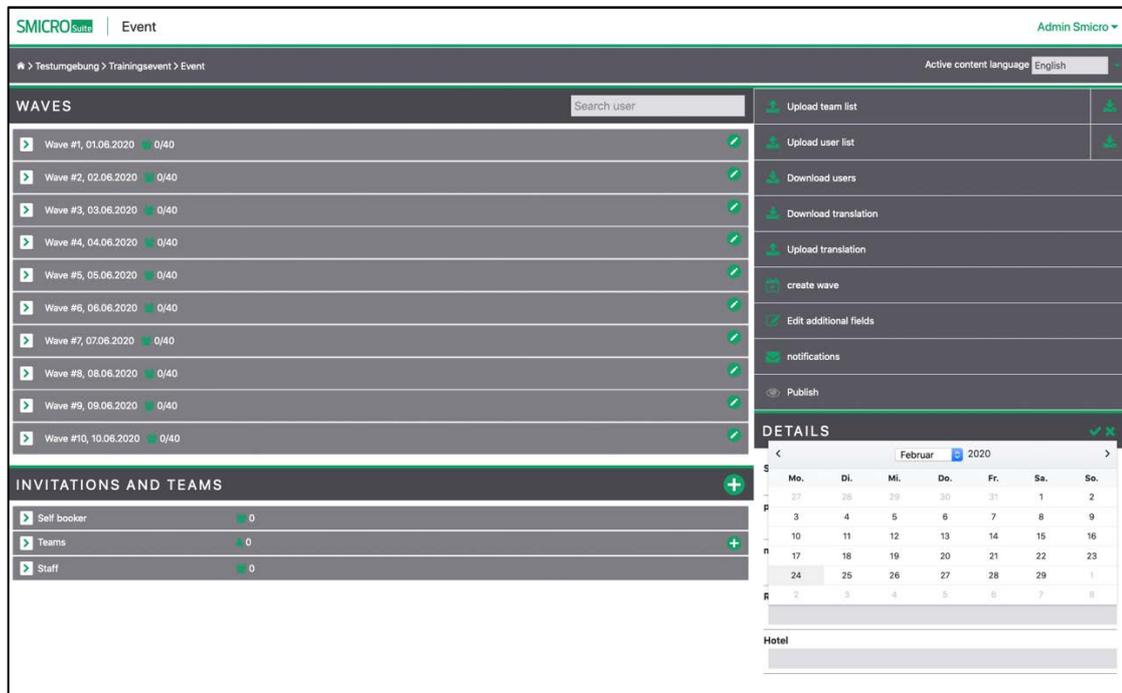
This close-up screenshot focuses on the 'INVITATIONS AND TEAMS' section. It shows a table with columns for 'Firstname', 'Lastname', 'E-mail', and 'prio'. A participant named 'John Smith' with email 'johnsmith@smicro.de' is listed. Next to his name is a button labeled 'assign wave', which is circled in red. The right sidebar shows the event details, including 'State: Unpublished', 'primary responsible: Admin Smicro', and 'Registration deadline: deadline is missing'.

This screenshot shows the 'assign wave' dialog box. The dialog has a title 'assign wave' and a 'Remove assignment' button. It contains a grid of ten waves, each with a date and a '0/40' status. The waves are: Wave #1 (01.06.2020), Wave #2 (02.06.2020), Wave #3 (03.06.2020), Wave #4 (04.06.2020), Wave #5 (05.06.2020), Wave #6 (06.06.2020), Wave #7 (07.06.2020), Wave #8 (08.06.2020), Wave #9 (09.06.2020), and Wave #10 (10.06.2020). A 'Cancel' button is at the bottom left of the dialog.

## 10. Publish event

This step will send event related mails to the participants.

Simply click the button “Publish” on the right-side menu. The button will be greyed out, if no deadline for the event was set during creation of the training. In order to set a deadline, edit the event details in the lower right corner of the event screen and save.



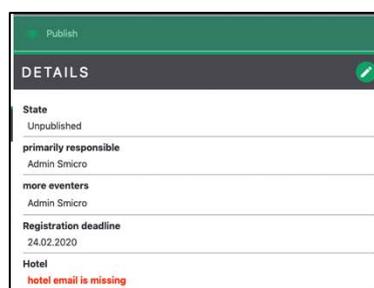
The screenshot shows the SMICRO Suite Event management interface. The top navigation bar includes the SMICRO Suite logo, the word 'Event', and the user 'Admin Smicro'. Below the navigation bar, there is a breadcrumb trail: '# > Testumgebung > Trainingsevent > Event'. The main content area is divided into three sections: WAVES, INVITATIONS AND TEAMS, and DETAILS. The WAVES section contains a list of waves from Wave #1 to Wave #10, each with a date and a progress indicator (0/40). The INVITATIONS AND TEAMS section shows options for Self booker, Teams, and Staff, each with a count of 0. The DETAILS section is partially visible, showing a calendar for February 2020 and a 'Publish' button. The 'Publish' button is highlighted in green.

The deadline defines the date on which the reminder email will be sent out to participants. The email will only be sent out to users who have not filled in all the required fields in the form created in step 5.

In the details section you can also edit the primarily responsible person and more eventers.

The users selected here will receive summaries about changes to the participant's event data.

Optional you can define a hotel email. Changes to fields marked as “relevant for hotel” will be sent to this email.



The screenshot shows the 'Publish' button in the SMICRO Suite Event management interface. The button is highlighted in green. Below the button, the 'DETAILS' section is visible, showing fields for State, primarily responsible, more eventers, Registration deadline, and Hotel. The 'Hotel' field is marked as 'hotel email is missing'.

Once the event is published, event emails will be sent according to the chart in step 6.