

Convention Manager

Web Application Developed by Westlinks Online

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Abstract

This document defines the application and provides details on usage and operations.

Chapter 1

Overview

Defininitions:

Convention Manager is a cloud based Software As A Service (Saas) web application which provides customers with a platform to operate a convention. It is built specifically to manage 12 step conventions, but it is possible to adapt it to other events with certain modifications.

The platform runs on a web server and is used via any modern web browser.

Westlinks Online (www.westlinks.com) is a technology company focused on infrastructure management and web application development.

1.1 Infrastructure

The platform is a cloud based infrastructure with the following details. A typical setup consists of a development and a production server. Optionally (but recommended) is a Nagios monitoring service which requires an additional server. This service sends alerts in the event of a server failure.

- Hosting Provider
DigitalOcean
- Server
Ubuntu 20.04
1 CPU Core
2 GB Memory
- Database
MariaDB Version 15.1
- Programming Language
PHP Version 8.1.4
- Web Application Framework
Laravel Version 9.8.1

- Email SMTP Provider
Sendgrid
- Digital Voice Provider
Twilio

1.2 Hosting

content

1.3 Development

content

Chapter 2

Public Website Views

The platform consists of the following sections

2.1 Top Navigation

Used to provide links to website page views. It is partly dynamic, where it gets its data from the database. There are slight differences for authenticated and unauthenticated users.

2.2 Home Page

Available to the world. Does not change for authenticated users other than the top navigation.

2.3 Events

Events are the core of the platform. The entire convention is made up of a series of events. Each event has a start time (datetime) and a duration.

Additional columns determine things like event type, whether it is published or unpublished, and much more. See the table schema for more information.

The website splits event views into the following filtered lists:

2.3.1 Convention Timeline

Lists all events in chronological order based on the start_at field

2.3.2 Speaker Meetings

Filtered list of events based on event_type_id = 3, Speaker

2.3.3 Marathon Meetings

Filtered list of events based on event_type_id = 4, AA Marathon

2.3.4 Al-Anon Events

Filtered list of events based on event_type_id = 5, Al-Anon

2.3.5 Meals

Organized meals for advance purchase/reservation such as

- Banquets
- Luncheons
- Barbeque

2.3.6 Sporting Events

Sporting events such as

- Golf
- 5K Walk/Run

2.4 Registration (Sales)

The Registration section is a simple ecommerce system consisting of these sections:

1. Products Page - Lists all products and services including the Event Registration. The user can adjust quantities, enter badge names, enter text for personalized commemorative items and finally write special instructions or requests in a text field.
2. shopping Cart - Provides a summary of the pending purchase. The user can either return back to the products page to make changes (edit) or advance to Checkout.
3. Checkout - Provides a final list of the pending purchase with the credit card form. Submitting the credit card form creates the order.

The primary purpose of this section is for attendees to register for the convention, where they pay for and obtain a badge which gains them access to the events. Additionally, meals, sporting events and commemorative items are available for purchase on the products page.

2.4.1 Registration

Each attendee of the convention must be registered. This purchase provides access to all events except for those requiring additional fees such as meals and sporting events. One customer may purchase one or more registrations. Each registration must be accompanied by a badge name. Attendees will wear the badge during the events.

- Collect badge a name for each registration purchased.
- Badge consists of first name, last initial and city/group

2.4.2 Meals

The convention consists of one or more meals which require additional fees. A meal may include multiple options as follows

- Chicken
- Salmon
- Vegetarian

These variations are defined in the products section. The meal menu is shown to the user as an accordion style dropdown and defined in the product category.

2.4.3 Merchandise

Unlimited merchandise items may be added to the store. Each one is defined as a category with its individual items defined as products.

Example merchandise categories are

- Fan
- Candle
- Mens Tshirt
- Womens Tshirt
- Mug

Collect personalization text

Each of these categories can include one or more associated products such As

- Small
- Medium
- Large
- Mug
- Personalized Mug

Collect personalization text during purchase process

2.4.4 Donations

Content goes here

- AA Scholarships
- Al-Anon Donations

2.4.5 Sporting Events

Sporting events are off-site activities which may or may not require extra fees.

- 5K Walk/Run (Free)
- Golf
 - Assemble groups of up to 4 golfers
 - Collect golfer names during purchase process

2.5 Information

General information about the convention

About

About AA About the convention (general)

Convention Information

Specific information about the convention including ticket refund policies

Area Information

Useful for visitors unfamiliar with the surrounding area. May include tourist and hotel information

Volunteer

Details for potential volunteers including a schedule of planned committee meetings.

2.6 Contact Us

Content goes here

Chapter 3

Authenticated Website Views

When a user is authenticated into the website (logged in), they have several additional features available to them that are not available to non-authenticated users. Because we know who they are, we are able to provide a more personalized experience. This personalized experience is one of the primary features of this platform.

3.1 Profile

3.1.1 Profile Information

3.1.2 Dark Mode

3.1.3 Mobile Phone Number

3.1.4 Update Password

3.1.5 Two Factor Authentication

3.1.6 Browser Sessions

3.1.7 Delete Account

3.2 Dashboard (My D22)

The dashboard can be considered as the top level portal for all personalized content and is essentially the homepage for authenticated users.

These are the top level menu items for the Dashboard:

3.2.1 Next Up

Displays the next events in the schedule over the next 3 hours in chronological order.

3.2.2 My Schedule

An authenticated user may create a personal schedule of events. The user can add/remove events by visiting the event lists and detail pages. Each event in their collection appears on the My Events page.

Additionally, a user can set a reminder for each of the events in their schedule. The reminder is an SMS text message sent by the system 10 minutes prior to the event.

```
1      Reminder: The meeting MEETINGNAME starts in 10 minutes
2      in the ROOMNAME. Hope you can make it.
3
```

Listing 3.1: Sample SMS Text

My Service Commitments

A list of all approved service commitments for this user.

Find a Commitment

All available commitments are listed. The user can volunteer for a commitment. Once the request has been approved, it will appear in the users "My Schedule" list.

3.2.3 My Meals

A list of all meals purchased by the authenticated user. At the top of the page is a list of links to meals available for purchase. This list is directly tied to the product table, and will not appear when a meal has been sold out.

3.2.4 My Orders

A list of all orders placed by the authenticated user. Each order in the list is clickable allowing the user to view the order detail view (their receipt).

3.2.5 My Announcements

A list of all personal announcements sent to the authenticated user. They are segregated by active and inactive statuses.

An active announcement will appear at the top of the user dashboard view.

3.2.6 Help

Top level for the customer support section consisting of

- Ask for Help
- My Messages
- Documentation
- About

Zendesk

- If Zendesk IS included in the convention account, then Ask For Help and My Messages will consist of Zendesk support tickets allowing a 2-way communication thread.
- If Zendesk IS NOT included in the convention account, then My Messages consist only of messages sent to the convention via the Contact Us form. This option will not show a 2-way communication thread, just the inbound

3.3 Admin

Content goes here

Listings

3.1 Sample SMS Text	9
-------------------------------	---

Chapter 4

Administration

The entire functionality of the platform is managed through the admin section.

4.1 Admin Dashboard

This is the top level admin page consisting of several cards with statistical reporting. Most of the items shown are selectable by admins. See below for the procedure.

The first card is a simple list of tracked items followed by user statistics.

- Items Sold (by category)
- All users
- Verified users

This card is followed by these cards:

- Marathon Meeting statistics
- Other Commitments
- Gross Revenue

On the right side of the admin dashboard is a series of user-defined cards. Follow this simple procedure to add/remove cards.

How to Add/remove cards for the admin dashboard

1. Edit Category
2. Select "Track sales of this item on Admin Dashboard?"
3. Enter Goal amount.
4. Submit

4.2 Announcements

It is possible to publish announcements to users. There are two types of announcements. A Public Announcement is visible to all authenticated users. A User Specific Announcement is only visible to a single user.

4.2.1 Public

Visible to all authenticated users on the Dashboard page. The announcement is displayed in a thin red strip with yellow fonts.

How to Add/Remove a Public Announcement

1. Go to Admin > Announcements > Public
2. Click the CREATE button
3. Type in the announcement
4. Select "Is Active"
5. Click SAVE

HINT: If there is a previously written inactive announcement which will not be used again, you can simply edit it and select Active to recycle it.

4.2.2 User Specific

Visible to just a single (specific) user. The announcement is also shown in a thin red strip with yellow fonts. If there is an active public announcement, the user announcement will be placed directly below it.

How to Add/Remove a User Specific Announcement

1. Go to Admin > Users > All Users
2. Locate the user to which you want to add the announcement
3. Click their name to load the user detail view
4. Scroll down to User announcements
5. Click the CREATE button
6. Type in the announcement
7. Click SAVE

When the user sees their announcement, they will see a [confirm] link. Clicking confirm clears the announcement from their dashboard. It also provides feedback to the administrators informing them that the user has seen the announcement.

4.3 Content Management (CMS)

All dynamic content is managed in this section. Dynamic content consists of pages and various defined blocks throughout the website. Although you can find all content in the admin CMS section, most of the locations where this content is used have edit links on their front end views to make it easy to edit without the need to hunt for it in the admin section.

4.3.1 Menus

Content

4.3.2 Pages

Content

4.3.3 Media Library

Content

4.4 Events

Content

4.4.1 All Events

Content

4.4.2 Al-Anon Events

Content

4.4.3 Event Roles

Content

4.4.4 Meals

Content

4.4.5 Marathon Meetings

Content

4.4.6 Speaker Meetings

Content

4.4.7 Virtual Meetings

Any meeting can be configured as a Virtual meeting. A virtual meeting can be either solely virtual or hybrid.

1. Edit existing Event to which you wish to make virtual
2. Select "Is Virtual"
3. Select "Hybrid" if the event will be virtual AND in-person simultaneously
4. Enter the "Lead Time". This is the number of minutes prior to the start of the meeting when the link will appear on the website..
5. Enter the "Virtual URL". This is the URL for the meeting.
6. Enter the "Access Code". This is the code to manually enter into the videoconferencing application.
7. Select "Public". If checked, there is no password required. If unchecked, you must enter the password in the next field.
8. Enter the Virtual Password. Users must enter this password in order to enter the virtual meeting.

4.5 Locations

Content

4.5.1 Locations

Content

4.5.2 The Zoom Location

Content

4.6 E-Commerce

E-Commerce sales are based on Categories and Products. A Category can have one or more associated products. Ultimately products are what is sold to customers. Categories are used to group products together, such as multiple Tee Shirt sizes belonging to a Tee Shirt style (e.g. Men's Crew Neck Tee).

Example:

- Category: Womens Racerback Tank
Associated Products
 - Small
 - Medium
 - Large
 - X-Large
 - 2X-Large

Categories can be enabled and disabled toggling the "Published" field.

1. Locate the category to toggle
2. Click Edit
3. Check/uncheck "Published"
4. Save

Products can be manipulated in three different ways.

1. Enable/disable with Published field (does not show in product listing)
2. Make available based on quantity on hand (Shows "Sold Out" in product listing)
3. Make sellable/unsellable (shows as "Not Currently Available" in product listing)

To make these changes

1. Locate the product you wish to edit (hint: find the product at the bottom of a category page)
2. Click Edit
3. Check/uncheck "publish", "Sellable"
4. Reduce quantity to 0 if you wish to show as "Sold Out" or a larger value to make it available

4.6.1 Products

Content

4.7 Reporting Dashboard

Content

4.7.1 Sales

- All Orders
- Transactions
- Order Batch Generator
- Registration Report (view)
- Registration Report (CSV)
- Exception Report (view)
- Exception Report (CSV)

4.7.2 Products Sold

- Donations
- Meals
- Merchandise
- Clothing
- Product Purchases (CSV)
- Commemoratives

4.7.3 Service Commitments

- Greeters
- Hospitality
- Marathon Leaders
- Security
- Speakers

4.7.4 Sporting Events

- Golf Teams
- 10K Walk / Run

4.8 Settings

Content

4.8.1 Settings

Content

4.9 Support

Content

4.9.1 Settings

Content

4.9.2 Website Manual

Content

4.9.3 Zendesk Tickets

Content

4.9.4 Voicemails

Content

4.9.5 Voicemail Greeting

Content

4.9.6 Westlinks Support

Content

4.10 Users

Content

4.10.1 All Users

Content