Event Portal (EP) Configuration Guide (23.1 Release)

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What is Event Portal?

Event Portal (EP) is a web-based application that allows users to have complete oversight of their event, complete tasks assigned by the venue, review function planning, service orders, view registration details (*if applicable*), event documents & contracted space.

Introduction

The audience for this guide is internal Ungerboeck staff only; this is not to be shared in its entirety with clients. This first section of this guide will outline prerequisites and what's new for v23.1. The next section will address in detail the configuration options within Event Portal. Lastly, the general workflow of Event Portal is documented.

Any questions or inquiries on any content in this guide should be directed to the Product Manager, Venues Event Management.

Pre-requisites

Before you begin configuring Event Portal, the following items or tables will need to be configured or confirmed.

Site Configuration

In order for the app to deploy, it needs to be installed by IT. To set this up for a hosted site, please enter an IT case with the following options checked:

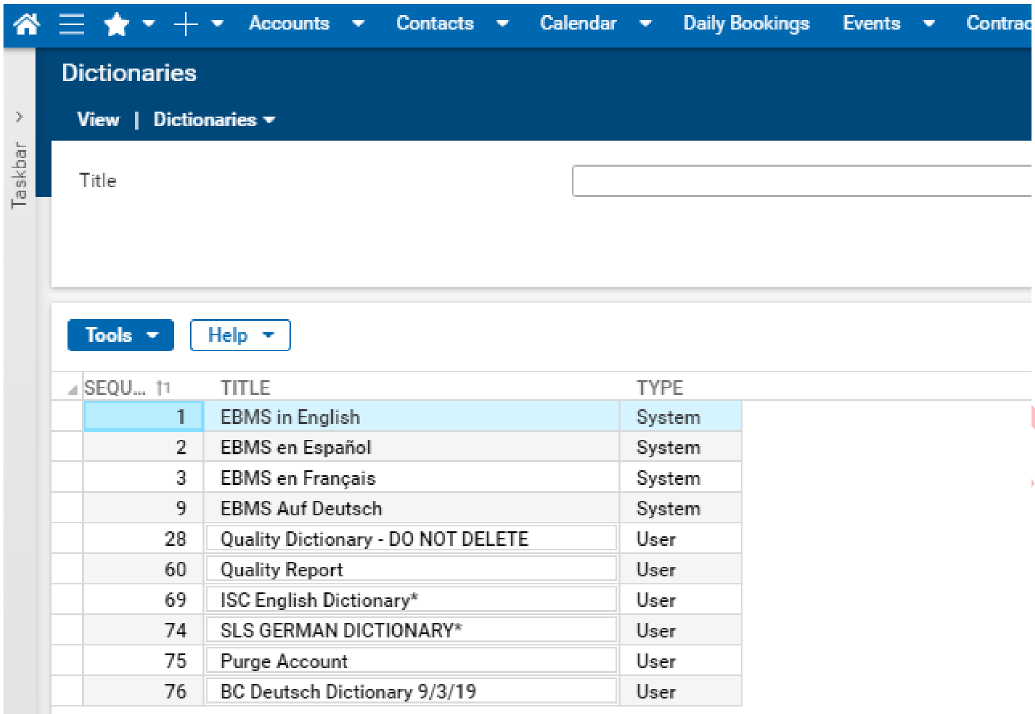
In addition, when updating a site to a new version of the software, please submit an IT case to also update application files in addition to the back-office files.

Dictionaries

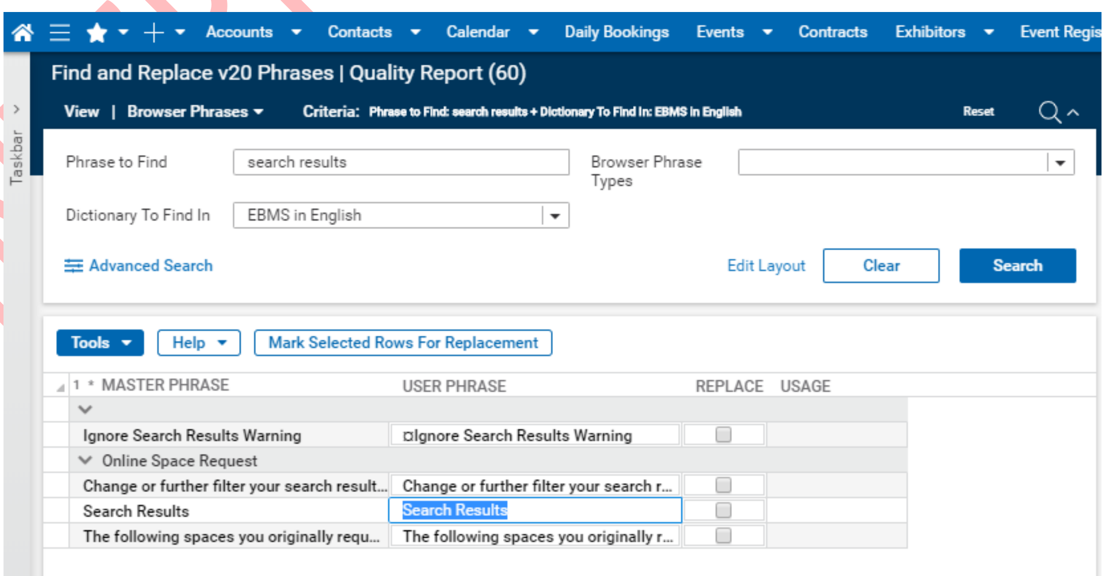
Before users can start utilizing the Event Portal app, it's recommended to configure a custom dictionary. This will drive the phrases as they appear in the app and allow users to customize phrases in Event Portal.

To configure a dictionary, go to: Main Menu > Dictionaries:

- There are a number of dictionaries that should already come with the system. For example, 'EBMS in English'.



- To be able to change standard phrasing to organization-specific phrasing for your Event Portal, a new dictionary must be created.
    - Right-click on an existing dictionary > Tools > Copy Dictionary (v19).
    - This will create a bridge to the v19 version of the software. Enter the description for the new dictionary.
- Once the new dictionary is created, standard phrasing can be modified. Right click on the dictionary > 'Find and Replace v20 Phrases'.
    - Search for the phrase that should be changed.
    - Update the value in the User Phrase column for the appropriate standard phrase.



Enhancements v23.1

- SSO (Single Sign On) Support Event Portal (EP) now supports Single Sign On (SSO). (Will require working with Solutions to utilize this feature.) VENEM-580
- AAT Support EP now supports use of AAT with Single Sign On (SSO) – Work with Solutions to implement is required. VENEM-405
- Internal Service Order Items In Event Portal (EP), on Service Orders, any item that has been flagged as Internal (ER101_INTERNAL) will no longer show. VENEM-496
- Service Orders Redesign The Service Orders/Items tab in Event Portal (EP) has been redesigned to a cleaner format, grouping is no longer based on item status.
- EP Hide Event Logo if an Event Logo is not added to the event record VENEM-398
- Documents – Show on Event Portal In Event Portal (EP), A new checkbox has been added to document properties on Events and Event Tasks - Show on Event Portal. It is also available in Edit Multiple documents. This indicates if the document should be shared with external users via Event Portal. VENEM-360
- Show Multiple Documents In Event Portal (EP), if a task has multiple documents attached, all documents will now show. Previously, only the most recent document showed. VENEM-359
- Select Contact for Message - If Messaging is activated in Event Portal (EP), a user sending a message in EP can now select from a list of event contacts to send the message to. Available contacts are those assigned on the EP base configuration as well as selected event contacts (Coordinators 1 thru 4 – must be active in personnel designation). When a message is sent with the contact selected, the message will display the contact in the back office message view in the To User Recipient field. Messages can also be filtered by this value. VENEM-406.
- Reg Count So Far Sort Logic to no longer counts Cancelled Registrants regardless of with or without fees VENEM-413
- Deep Link to Tasks Event Portal (EP) now supports deep linking into specific Tasks. This will allow a link to be provided to a user which will allow them to directly access a specific Task inside of EP. (Will require working with Solutions to utilize this feature.)
- Seamless Login to External Links - A new checkbox has been added to Tasks with the type of External - Authorize External Link. If checked, an external link added to a task allows for an AAT code to be added to the URL when it is clicked by the user. This will allow bypassing the login of external sites providing a seamless transition between EP and external links. (Will require working with Solutions to utilize this feature. Patched to 30.99B.) VENEM-416

Solutions:

- SSO Support
  - Requirements
    - Account Code & Contact Code – these should both be set to the account the user will be signing in with.
      - AcctCode / ContactCode
- Deep Link Support for Tasks Only
  - Requirements
    - Event ID & Task ID
      - EventID / TaskID

- AAT Support on External Tasks
    - This solution was created for Chris Laffey for AVMC.
        - Use Case: Customer wanted to leverage the External Task to send the user to a custom-built web form & SSO login the user into the form.

Backoffice Configuration:

Creating Event Portal Categories

- Define the categories for documents that will be viewed on the Event Portal. When viewing the portal, user will be able to filter based on the category set in back office e.g. catering, audio visual. This should be a best practice completed by users when documents are added into Ungerboeck.
    - Main Menu
        - Search Event Portal Category
            - Add
                - Description
                - Active – checked box indicates the material is viewable on Event Portal

Event Task Sets (for additional information on the task types see Event Tasks in this documentation).

- Create predefined sets of Common tasks for the different kinds of Events you produce to be completed by portal user e.g. review contract, approve catering menus or submit floorplan from the event level.
    - To expedite this process users can set up Event Task Sets to be used event to event.
        - Add Event Task Set - use this feature if tasks are being used repeatedly for events.
            - Main Menu > Administration > Event Task Set
            - Add
                - Description
                - Active checkbox
                - Task tab – Add task set
                    - User can control when the task appears on Event Portal by using the display date & due date fields. Please note Event Portal doesn't support Function tasks.
                    - Review tasks now support documents & document template. When task set is applied to an event the document will merge to the event task documents tab.

EVENT PORTAL SETUP: Base Configuration

This is the first thing to be configured when setting up Event Portal. The base configuration will not house any event specific information; rather it will house details about the venue or any information that will not change from event to event.

Main Menu > Event Portal Base Configuration > Add

SETUP TAB:

- Enter a Description for the base level configuration
- Main Title to display as a header on portal home page
- Main Description will appear beneath Main Title
- Show In and Out – checking box displays date in back office on portal home page
- Show Start and End – checking box displays date in back office on portal home page
- Show Attendance – checking box displays attendance number that is input in back office at the event level on the portal home page
- Show Bookings – checking box – enables displays the events bookings on the portal (see Bookings Page below for more information)
- *Show Registrants - field is only available to customers licensed to Registration. Continue configuration on Event Level Event Portal Set-up.*
- Show Tasks – checking box enables Task tab to display tasks assigned at the event level on the Event Tasks tab
- Show Documents – checking box enables Documents tab on the portal.
- Show Functions – checking box enables display of Functions on the portal.
- Show Contacts – checking box enables Contacts tab to display on portal
- Web Theme – create a customized color scheme & choose different font types
    - Users are now able to add a Logo Image & Banner Image
        - Recommendation for Banner Image – 16366x478 Pixels
        - Recommendation for Logo Image – 150x50 Pixels
- Public Sign In Configuration – (required) display pre-configured sign-on configuration. For information on how to configure please see the configuration guide on the knowledge base. https://supportcenter.ungerboeck.com/hc/en-us/articles/360017840074-Sign-In-Configurations-for-Public-Facing-Applications
- Payment Portal Configuration – (required) display pre-configured Payment Portal. For information on how to configure please see the configuration guide on the knowledge base.
    - The Payment Portal integration within Event Portal has been updated to the newest code work. Users will need to update their Event Portal Base Configuration with a newly configured Payment Portal that is configured to use Version 2 (Angular) via the Payment Portal Version dropdown to avoid user disruption.
    - https://supportcenter.ungerboeck.com/hc/en-us/articles/236066028-Payment-Applications-and-Configuration

- Tasks Page - *Task page is sorted by due date & descending, high priority task always appearing at the top & the secondary sort is by status*
  - Task Title – (mandatory field)
  - Task Description – (optional field)
  - Show Task Category Filter – checkbox
  - Show Assigned to Task Filter – checkbox
  - Show Task Status Filter – checkbox
- Documents Page
  - Document Title – Header
  - Document Description – will display under the header
  - Document Sort Order – a dropdown selector controls how documents are sorted for display on Event Portal
  - Show Document Category Filter – a checkbox indicates the material is viewable on Event Portal
  - Show Document Type Filter – a checkbox indicates the material is viewable on Event Portal
  - Show Document Description Filter – a checkbox indicates the material is viewable on Event Portal
  - Show Document Changed Filter – a checkbox indicates the material is viewable on Event Portal
- Functions Page
  - Function Title - Header
  - Function Description – will display under header
  - Display Function Room – checkbox to display the space associated with the function
  - Function Status – selects functions to display by status - multi-select field
  - Function Usage – selects functions to display by usage - multi-select field
  - Function Level – selects functions to display by level - multi-select field
  - Show Function Space Filter – checkbox
  - Display Function Attendance – checkbox to display each functions ordered attendance
  - Show Function Notes – checkbox (Note, EP does not support full note format capabilities on Event Portal. Only text will display.)
  - Function Note Class – selects the note classes to be displayed – multi-select field
  - Show Function Service Orders – checkbox
  - Show Function Usage Filter – checkbox

- Order Processing (*Premium Event Portal Licensing)
  - Enable Order Processing - Checkbox to enable the this for your EP configuration
  - Use Event Bill-To for Order Bill-To – checkbox - when selected orders are saved in EP the Bill-To account and contact on the order will be set to the bill-to account/contact on the selected event instead of the bill-to from the logged in user.
  - Order Processing Component Configuration - select configuration to be used. *See Order Processing Configuration guide for more information. https://supportcenter.ungerboeck.com/hc/en-us/articles/360021260953-Order-Processing-Configuration
  - Default Event Pricelist - select pricelist to be used on portal. We recommend creating a pricelist especially for the Event Portal. An Event Level Price list will override pricelist selected on the Event Portal Base Configuration. If no price list is selected on the Event, then the system looks at the Event Portal Base Configuration price list.

- Terms & Conditions - select configuration to be used. *See Terms & Conditions guide for additional information. https://supportcenter.ungerboeck.com/hc/en-us/articles/360003471133-Session-Proposal-Terms-and-Conditions-Configuration
- Enable days before OP Becomes Inactive - By enabling this field, it allows you to configure the 'Days before Event OP Becomes Inactive' field.
- Send Confirmation Email - when enabled the following fields will populate.
- Confirmation Email Template - Select template from drop down or *See Email & Merge Templates guide for additional information. https://supportcenter.ungerboeck.com/hc/en-us/articles/204567988-Email-Templates
- Email Confirmation Report - Select report from drop down or create new report via the Report Master window.
- Days before Event OP Becomes Inactive - this field is dependent on "Enable days before OP Becomes Inactive" is checked. By entering a numeric value within this field, it will close the Event Portal to online ordering for users that number of days before (or after for negative numbers) the Event start date. If '0' is entered, the ordering will close the day of the event start.
- Confirmation From Email Address - input email address you want the email response to come from.

- *Please note when Order Processing is enabled on the base configuration, the Payment Portal field becomes required as well. We are planning to address this issue in a future version.*
- Contacts Page – (optional and controlled by "Show Contacts" checkbox)
  - Contact Title – (mandatory field if Show Contacts is active)
  - Contact Description – (optional field)
  - Show Service Accounts checkbox – if selected this will enable the Service Account Section to appear on the Contacts Page. Please note Service Accounts must be configured to show on the Event record Service Accounts Tab to be visible. Service Accounts Section will automatically default to the bottom of the Contacts page.
    - Service Account Section Title
    - Service Account Section Description
  - For additional information on what will be displayed see the *Contact Section Tab:* section below.
- Event Selector Page
  - Event Selector Page Title – (mandatory field)
  - Event Selector Page Description – (optional field)
  - Hide Past Events – checkbox
- Show Bookings Page – *the following fields will automatically appear on the bookings page & are not configurable; dates booked, load-in, load-out, room, square feet (gross area) & status.*
  **** Gross Area will need to be filled out on the space level for the square feet to appear on Event Portal Bookings Page.*
  - Event Bookings Page Title – (mandatory field)
  - Event Bookings Page Description – (optional field)
  - Booking Status - drop down multi-select field
  - Show Date Filter on Bookings Page - checkbox
  - Show Status Filter on Bookings Page - checkbox
  - Booking Usage - drop down multi-select field
  - Show Space Filter on Booking Page - checkbox

MAIN PAGE SECTIONS TAB:

Users cannot sequence the main page sections themselves. By default, they will appear on-line in the following sections and order if added to the configuration: Middle Section of the screen: Tasks, News Articles, Videos, Images. Right Section of the screen: Registrants (if enabled), Documents, Contacts. Users can have multiple news, image or video sections and are able to sequence each sub-section within its main section.

- Add Contact Section - displays personnel contacts that have been added to the contacts tab in the right-hand side of the screen.
  - User can only display a maximum of (3) contacts on the main page. This is done on the contacts tab by selecting 'Show on Main Page' checkbox via the contact window. The order of contacts chosen is based on descending, first contact entered will appear first on the main page. For additional information on what will be displayed see the *Contact Section Tab:* section below.
  - Active – a checkbox indicates the material is viewable on Event Portal
  - Title – (mandatory field)
  - Number to Show – you can enter 1 -3 maximum

- Add Document Section - displays documents from USI & will appear to the right-hand side of the news & update section
  - Add
    - Title - (mandatory field)
    - Description - (optional field)
    - Number to Show – user can only display a maximum of (3) documents
      - Documents will display on the main page in ascending order - this means it will display recently added or updated documents
    - Sort Order – dropdown to select how you want Documents Sorted
    - Active – a checkbox indicates the material is viewable on Event Portal
    - Sequence – allows user to order sections within the main section

- Add Image Section – add images to the home page in the middle section of the screen. Create multiple sections with the ability to categorize e.g. food and beverage photos as a section. Mandatory size is 869 x 306 pixels.
  - Add
    - Title - (mandatory field)
    - Description - (optional field)
    - Number to Show – depicts the amount that are displayed on the portals home page
    - Active – a checkbox indicates the material is viewable on Event Portal
    - Sequence – allows user to order sections within the main section
      - Media Tab - Click Add
        - Title - (mandatory field)

        - Description - (optional field)
        - Sequence - (Order of the Images added to display on home page)
        - Source –
            - External
            - From Ungerboeck Select document (image) from USI
        - Image URL – enter the full URL if you select "External"

- Add News Section – display articles or informational material in the middle section of the screen. Create multiple sections with the ability to categorize e.g. venue news.
    - Add
        - Title - (mandatory field)
        - Description - (optional field)
        - News Class – defaults to "Article"
        - Number to Show – number of items that are displayed on the portal's home page
        - Sequence – allows user to order sections within the main section
        - Active – checkbox indicates the material is viewable on Event Portal
        - Articles Tab – Click Add
        - Title
        - Add Text
        - Source – image to correspond to article
            - From Ungerboeck
                - Select document (image) from USI – this photo should correspond with the article
            - External
                - Add Image URL – this photo should correspond with the article. Preferred size 16x9 format & exact measurements is 340 x 191 pixels.

- Add Task Section - displays the maximum of (3) tasks that are automatically selected based on the due date in the middle section of the screen. Only tasks that have a due date & have a status of in progress & new will display on the main page.
    - Title – (mandatory field)
    - Number to show – you can enter 1 -3 maximum
    - Active – a checkbox indicates the material is viewable on Event Portal

- Add Video Section – add YouTube Videos to home page in the middle section of the screen. Create multiple sections with the ability to categorize e.g. food and beverage photos as a section.
    - Add
        - Title - (mandatory field)

        - Description - (optional field)
        - Number to Show – number of items that are displayed on the portals home page
        - Active – a checkbox indicates the material is viewable on Event Portal
            - Media Tab - Click Add
                - Title - (mandatory field)
                - Description - (optional field)
                - Sequence - (Order of the Videos featured on home page)
                - Image URL - Input YouTube embedded URL
                    - Image URL - Video's embed code from YouTube. You must enter the URL that appears between the quotes. For example, the below is a sample embed code. The underlined and italicized text is the information you need to include in the Image URL field: <iframe width="1280" height="720" src="*https://www.youtube.com/embed/6tdPjmL9_4w*" frameborder="0" allow="accelerometer; autoplay; clipboard-write; encrypted-media; gyroscope; picture-in-picture" allowfullscreen></iframe>

DOCUMENTS TAB:

- Select – documents from back office to be displayed on the documents tab
    - Best Practice – notate Event Portal Category when adding a document into USI. This will allow portal users to easily filter documents.
- Base level configuration documents should not be event specific.

CONTACT SECTIONS TAB:

Displays personnel contact information & their photo. User has the option of not checking certain checkboxes if they do not want the contact information to appear. Contact personnel position & contact logo will always appear on the Event Portal record. If contact record is missing an image, an image place holder will appear. If personnel position is not chosen on the contact record nothing will appear on Event Portal.

    - Add
        - Title - (mandatory field) – title for the section.
        - Description - (optional field) – description for the section.
        - Sequence – If more than 1 Contact Section is added to the EP Config – this setting controls the order in which they are displayed.
        - Active – a checkbox indicates the material is viewable on Event Portal
        - Contacts Section – Add Contacts to your section.
            - Show Contact on Main Page – checkbox - displays personnel contacts that have been added to the contacts tab.

        - User can only display a maximum of (3) contacts on the main page. This is done on the contacts tab by selecting 'Show on Main Page' checkbox via the contact window. The order of contacts chosen is based on descending, first contact entered will appear first on the main page.
    - Contact Type
        - Salesperson, Coordinator 1, Coordinator 2 etc. if coordinator is assigned at the event level the information will be pulled from the selected Contacts Standard Title (EV_870_TITLE) and Position (EV365_POS_DESC) and displayed under the contacts tab on the Event Portal.
        - Select Account – which allows the user to select a personnel account from USI – will pull its Description from the Contact Description in the EP Base Configuration.
    - Sequence – Controls the order in which the added Contacts will be displayed within the Section.
    - Checkboxes
        - Show Email
        - Show Phone (Direct Phone)
        - Show Mobile

- LANGUAGES TAB:

  Allows you to select not only your desired "Default" Language but also add alternate languages to your EP Configuration

  - Add – Add Public Language screen
    - Dictionary - (mandatory field) – select your dictionary
    - Default Language – checkbox to indicate which language will be the default
    - Language - (mandatory field) – select the appropriate language
    - Region - (optional field) – select the region to define the users time and date formats
    - Description to Use – select the dictionary description field to use for your selected language
      - Primary
      - Alternate Description 1
      - Alternate Description 2
      - Etc.

EVENT PORTAL SETUP: Event Level

The event level configuration will house only information that is event specific.

- For example: documents (contracts), tasks, and users (event organizer)

From Event Level > Click Tools > Event Portal Setup

- Description – Base Configuration Description - Select the Base Level Event Portal Configuration you want to use for your Event.
- Activation Date/Time & Deactivation Date/Time – setting these dates and times determine when the site is live & turned off. Both are required fields.
- Enable Messaging (see link to guide below)

DOCUMENTS TAB:

- Select/Add –documents to be displayed on the documents page of the Portal. Users can select documents from anywhere including the events documents tab.
    - Documents may be added directly into the Documents Tab of the Edit Event Portal Setup screen, or if the “Subject” filter is set to “Event Document” it will only display documents added to the Documents Tab of the Event.
    - Best Practice – add your Documents to the Documents Tab on the Event screen and apply an “EP Category” to the document (you may need to add this field to your Event Add Document screen via Edit Layout). Adding the Category will allow portal users to easily filter documents by EP Document Category. Then add them to your Documents Tab of your EP Setup screen.
    - Event level configuration documents should be specific to the event.

USERS TAB:

Ensure the internet logon checkbox is checked on each assigned Users contact record. This will allow user to logon to the application. To set-up password: Contact level > tools > change internet password.

For users to access the portal they need to be manually added to the Users tab. Once added the clients back-office user will have to notify the end user(s) of their Event Portal username (email address associated with contact) & password. The end user(s) can re-set their password in the portal once they sign-In (click the drop-menu on the user name > select manage profile > reset password).

- Add
    - Account
    - Type
        - Standard – view & complete tasks
        - Administrator – same access as standard apart from payment portal and having the ability to assign tasks to other users.
    - Active – checked box indicates whether the user can access the portal

REGISTRANTS PAGE: These options will only appear for Users licensed to Registration & will only populate if the 'Show Registrants' checkbox is selected.

    - Best Practice – only display up to 5 columns on the configuration. This will be in addition to the first name, last name & email fields that display by default.

- Registrants Title
- Registrants Description
- Show Statues & Reg Count on Registrants Page
    - User can view status breakdown by selecting the hyperlink that will trigger the slide out. We do not recommend users configuring their status background as white.
        - Also note the sort order logic is based on the order status by retrieving the event registrants & orders them by last name. Then to create the status breakdown we use the order the registrants were in.
    - Reg Count – this is a count of event registrants & does not include event registrants that are cancelled or cancelled with fees.
- Show Export Table Button - this will allow portal user to export displayed Registration list to excel spreadsheet
    - When selected "Export Registration UDFs" dropdown is enabled.
        - By selecting "Yes" Event Portal users will be able to include Order Registrant UDFs when exporting data via spreadsheet via Event Portal Registrants tab. Please note all active UDFs & multi-select UDFs will display in the export.
- Show Name Filter on Registrants Page
- Show Registrant Type on Table
- Show Registrant Order Date on Table
- Show Registrant Total on Table
- Show Registrant Check-In Date on Table
- Export Registration UDFs – No/Yes
- Show Status Filter on Registrants Page
- Show Registrant Order Number on Table
- Show Registrant Balance Due on Table
- Show Registrant Approval Level on Table
- Show Allergies on Table

Event Record:

Documents Tab: Add "Show on Event Portal" and "EP Category" columns to your grid view. This will allow you to push documents to be displayed on Event Portal. When the checkbox is enabled then the document will display on Event Portal Documents Tab via the Event Level Set-up & Event Portal Documents Tab. The EP Category value helps to filter, organize and report on documents for your portal.

- "Show on Event Portal" can also be added to the task record view.

Event Portal Messaging Tab: For additional information on Event Portal Messaging click: Event Portal Messaging User Guide

Event Services Tab: For additional information on configuring Event Services Accounts click: Event Services Article

The following fields are supported on Event Portal.

Services account section will default to the bottom of the contact's page. Contacts will display on Event Portal in the order they are entered.

- Add
  - Department – select department for event service.
  - Account – select the account responsible for the service.
  - Contact – if applicable, select the contact for the account that is responsible for the service.
  - Display Externally – when selected the contact will display on Event Portal
  - External Title – contacts title
  - External Description – add a short description to describe why a user would need to contact them.

Event Level EVENT TASKS Tab:

From the Event Level click on the Event Tasks tab - users can now assign Event Portal Users to tasks via the event level event task tab.

- Best Practice – set-up a view on the event documents tab to display task documents.

- Create tasks to be completed by portal user e.g., review contract, approve catering menus or submit floorplan.
- From the Event Window
  - Event Tasks tab
    - Add
    - Add Event Task Set (see knowledge base for additional information on how to create task sets)
    - Add Event Task
    - Review – tasks user with reviewing documents such as floorplans & custom catering menus - user must select approve or deny to complete a review task.
      - Title – Task name
      - Description – instructional text or giving additional information about the task
      - Type – choose review
      - Status – back office user can manually change task status. This should default to open when task is created.
      - Note Class – allows back office user to categorize the type of note
      - Allow Approval – click this checkbox to enable the approve or deny feature on event planner portal
      - Approve Status – must be manually changed & saved
      - Display Date & Time – date task will not appear on Event Planner Portal. The purpose of this field is for back office users only

    - Due Date & Time – date and time will appear on event planner portal. Default time is 12:00 a.m. - this will not appear on event planner portal. User must input time for it to display
    - Required – when checked the task will appear at the top of the task page & marked with high importance
    - Assign Task - Assign Event Portal User to specific tasks. Note that users must be added to the Event Level Event Portal Configuration prior to being assigned a task. Event Portal Users can also reassign tasks via the Event Portal Tasks Tab.
    - File Upload Configuration – select a pre-configured file upload configuration from the drop down, this enables the file upload control on the task slide-out on Event Portal.
        - Users of Event Portal can upload multiple documents if the file upload configuration allows. *Please note once the task is completed the Event Portal user will only see the first document they added to the task. The backend user can view document(s) in back office on documents tab on the task.
- Tabs on Review Task
    - Documents
        - Attach file you want a user to review and approve
    - Notes
        - Notes that are input on the Event Portal task will be stored on the notes tab
    - Details – displays when the task was completed or cancelled
- Submit - allows user to upload documents to Event Portal - user must upload a document to complete a submit task
    - Title – Task name
    - Description – instructional text or giving additional information about the task
    - Type – choose submit
    - Status – must be manually changed & saved
    - Note Class – allows back office user to categorize the type of note
    - Display Date & Time – date task will not appear on Event Planner Portal. The purpose of this field is for back office users only
    - Due Date & Time – date and time will appear on event planner portal. Default time is 12:00 a.m. - this will not appear on event planner portal. User must input time for it to display
    - Required – when checked the task will appear at the top of the task page & marked with high importance
    - File Upload Configuration – select a pre-configured file upload configuration from the drop down, this enables the file upload control on the task slide-out on Event Portal.
        - Users of Event Portal can upload multiple documents if the file upload configuration allows. *Please note once the task is completed the Event Portal user will only see the first document they added to the task. The backend user can view document(s) in back office on documents tab on the task.

        - Assign Task - Assign Event Portal User to specific tasks. Note that users must be added to the Event Level Event Portal Configuration prior to being assigned a task. Event Portal Users can also reassign tasks via the Event Portal Tasks Tab.

- Tabs on Submit Task
    - Documents
        - Documents that are uploaded to Event Portal will be stored here
    - Notes
        - Notes that are input on the Event Portal task will be stored on the notes tab
    - Details – displays when the task was completed or cancelled
- External - Input website you want to direct the portal user to. For an example venue utilizes a third-party audio-visual company. Venue can direct portal user to website via this task type
    - Title – Task name
    - Description – instructional text or giving additional information about the task
    - Type – choose external
    - Status – must be manually changed & saved
    - Note Class – allows back office user to categorize the type of note
    - Display Date & Time – date task will not appear on Event Planner Portal. The purpose of this field is for back office users only

- Due Date & Time – date and time will appear on event planner portal. Default time is 12:00 a.m. - this will not appear on Event Portal. User must input time for it to display
- Required – when checked the task will appear at the top of the task page & marked with high importance
- URL – enter a website URL
- URL Text to Display – description of what website is. Example, visit our vendor to complete this task
- All tasks allow users to manage their task status by selecting Cancel, Save or Save & Complete
- Assign Task - Assign Event Portal User to specific tasks. Note that users must be added to the Event Level Event Portal Configuration prior to being assigned a task. Event Portal Users can also reassign tasks via the Event Portal Tasks Tab.
- Tabs on External Task Type
    - Notes
        - Notes that are input on the Event Portal task will be stored on the notes tab
    - Details – displays when the task was completed or cancelled

Event Logo:

- If configured the Event Logo will be located on the Event Selector & Home Page of Event Portal.
    - Event Record: Image Logo Image Guidelines
- If Image Logo is left blank, then no logo will appear on the Event Selector or Home Page.

File Upload Configuration: **Select Link to view the File Upload Configuration guide.**

Once you have set your configuration click on the Copy Shortcut button at the top left corner of the screen. You will then see the green prompt appear at the top middle portion of your screen that the shortcut copied to clipboard.

- It's important to note when copying shortcut always ensure the configuration id (located at the end of the URL is supplied to the Event Portal user.

Application Workflow

Event Portal Workflow

1. Log In
    - Login must be contact of any designation with Internet Logon checked.
2. Event Selection (if applicable)
    - Active Events
    - Past Events
3. Main Page
    - Event Tasks
    - Registration Counts
    - News & Updates
    - Venue Contacts
    - Videos
    - Images
4. Event Tasks
    - Submit Task
        - EP now supports displaying multiple documents a user uploads to a task.
    - Review Task & Submit (if applicable)
        - EP now supports displaying multiple documents on a review task.
    - External Task
5. Documents
6. Schedule
    - Notes
    - Registration
    - Service Orders
        - Service Orders – Internal Items: EP will now filter out Service Order Items that are marked as Internal (ER101_INTERNAL) & will no longer who Service Orders that have no items/only internal items.
7. Registrants
8. Contacts

9. Manage Profile dropdown
    - Reset Password
    - Your Events
        - A view of Events user is working on
10. User Management
    - View all Event Users

END OF DOCUMENT