



User Manual

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Introduction

If you have ever put together an event complete with registrants and vendors you know that organization is the key. The *Go Events* event administration software is designed to help you get organized with ease and simplicity. Data is entered once and the system will do the rest. You will have access to detail and summary reports, along with functional reports such as name tags and receipts. Anybody that has organized an event knows that it helps to have access to last years event data. It's like having a head start when planning this year's event. Go Events will provide a way for you to store the event data for later reference.

The Import and Export features can be very useful. They are designed to allow one user to hand off the data to another user of this system. Please see the Export and Import sections of this user manual for more information.

You will have the ability to visually preview reports, print them to the printer, and even export them into digital formats such as PDF, rich text file, and more.

Thank you for choosing Go Events to help you organize and keep your event data. Maybe you'll finish all these administrative duties early and have time to enjoy the event yourself!

Installation

The Go Events software is installed via an installation routine. Depending on the speed of your computer, please allow 15-30 minutes for installation.

Installation consists of executing the following routines:

1. Setup.exe
2. Mdac_typ.exe

To begin the installation routine, please insert the CD into your drive. If after approximately 20 seconds, the setup routine does not appear, then find and execute "setup.exe" on your CD-Rom drive. (click your start button, then "run", then "browse" to find "setup.exe").

Generally, you will want to accept all default settings during the install process.

First, the installation routine will check your system to make sure it's ready for the installation. It will read "Copying files..." (there are 7 files). After the 7 files are copied, the installation may ask for a reboot. The message reads: "setup cannot continue because some system files are out of date... You will need to restart Windows...". If you get this message, go ahead and reboot your system. Then you will need to execute Setup.exe again on the CD-Rom to resume installation.

The installation will ask you where you would like the main application files (such as the database and executable file) installed. The default location of "c:\program files\EventReg\" is typically a good location.

The installation routine will begin installing files onto your computer. Sometimes, the installation routine will attempt to copy a file that is already present on your computer. When this happens, the installation routine will prompt you. It will ask you if you would like to keep the file that is already on your computer, or replace the file on your computer with the one from the installation routine. It is recommended that you choose the file that is newer. (Sometimes the file on your computer is newer, and sometimes the file being installed is newer). When the files are the same age, you either option is fine, but typically, you should choose to keep the file that is already on your computer (since you already have that file on your computer).

You may also get a message during installation saying "file access violation error occurred". This means you have the file on your system already and it is locked by another application or set as read only. The recommendation is to click "Ignore" and then confirm the "Ignore" setting so that you can continue the installation routine.

The installation routine will install a menu item on your "Start Menu" for your

convenience.

Next, execute mdac_typ.exe on the CD-Rom. This will install the Microsoft Data Access Components needed by Go Events. It is recommended that you accept the default settings.

For any problems with your installation, please visit www.GrandOakTechnologies.com for troubleshooting and support.

How To Use This Software

Overview

The software starts with a main menu screen. From this screen, you can navigate to all major parts of the application. It contains a menu bar across the top, several command buttons, and a place to select the event you would like to work with. The application is designed to always return you to the main menu screen after leaving any of the other functional areas. You will often find more than one way to get to where you want to go in the application from the main menu screen. For example, there is an “Edit Registrations” button and an “Edit Registrations” menu item.

Important Note: The software is designed so that the user selects an event to work with on the main menu screen. This selection drives what is seen in the remainder of the application. For example, if you select “Event ABC” on the main menu screen, almost all of the other screens will only show data for “Event ABC”. If you are not seeing the data you would like to, just remember to make the correct selection on the main menu screen.

In this application, you will have the opportunity to add, edit, and delete 1)events, 2)registrations, and 3)vendors. You will also have the opportunity to generate informational reports (such as a vendor list), or functional reports (such as name tags).

Important Note: Please see the sections concerning Importing and Exporting data and data backups. These are important topics that are designed to keep your data safe.

Add / Edit Events

Adding an event is the first task needed in the Go Events software. After that, you will be able to add registrations and vendors to that event. It is very simple to add or edit an event. There are only a few bits of information captured for an event. A primary and secondary event title, and an event date.

You also have the opportunity to delete an event. But please be aware, if you delete an event that has registrations or vendors assigned to it, you will lose all that data also.

The “Maintain Events” screen also gives you the opportunity to scroll through the event records by using the “<<” and “>>” buttons.

When you add an event, the system assigns an Event ID automatically.

Add / Edit Registrations

Adding or editing registrations is probably the most common task you will perform. A registration is someone that is signing up to attend the event. When you add a registration, it will be automatically assigned to the event that was selected on the main menu screen.

When adding or editing a registration, you can enter name, address, phone, and registration date information as well as detailed payment information. The personal information will later be helpful in for contact reports and mailing labels. The payment information will later be helpful for receipts and event summary information.

For each registration, the payment data can be entered in detail. You can enter several payment line items per registration. For example, for Susan Smith, you can enter \$50 for her registration fee, \$20 for books purchased, and \$10 for membership dues. This information will be helpful when the receipt is printed out later.

Add / Edit Vendors

Vendor maintenance is a little different than registration maintenance. A vendor is NOT automatically assigned to the selected event from the main menu screen. Instead, the vendor is added to the system, then you can assign the vendor to one or more events. This way you will not have to enter the detailed vendor data for each event.

Vendor data is useful for holding contact information and for the Event Summary screen.

Assign Vendors to Events

Assigning vendors to an event is very easy. Once the vendors have been added in the "Edit Vendors" screen, you simply choose the "Assign Vendors" menu option. By moving vendors to the list box on the right, you assign those vendors to the "active event".

View Event Summary

The event summary will give you an “at-a-glance” summary of the event. It includes event title and date along with registration count, vendor count, and gross receipts collected. This can be useful to check the progress of your event so that you can make fast, informed decisions.

Printing Reports

There are several reports available in Go Events. Some are informational, such as the registration or the vendor report. Some are functional, such as the name tag report or the receipt report. The reports are built with the technology to do all of the following: 1) preview the report, 2) print the report to a printer, and 3) export a report in electronic formats such as PDF, text files, and more.

The Registration List report can be accessed by going to the “View Registrations” screen and clicking the “Print” button. Likewise, the Vendor List report can be accessed by going to the “View Vendors” screen and clicking the “Print” button.

There is a Master Calendar report that will show the dates of all events in the system. You can access this report by clicking “View Calendar” on the main menu screen.

All other reports can be accessed by using the menu bar on the main menu screen. Here you will find reports such as the Name Tag report and the Receipt report. Both of these reports allow you to print a single record or all records for a particular event.

The name tag report is printed in Avery 5163 format (a standard address label format). The Avery 5163 format can be described as 10 adhesive labels per page, 4 inches wide by 2 inches high.

The address label report is printed in Avery 5160 format (a standard address label format). The Avery 5160 format can be described as 30 adhesive labels per page, 3 columns of 10 labels per page.

Exporting Data

The export data feature of this system is designed to allow users to pass data from one computer to another computer with the Go Events software. The Export Data feature can also be used to back up the data to a disk.

The export data feature is found on the menu bar under “Data”. When exporting data, the system will ask the user for a location to write the data to. Use the “drive” and “directory” fields to select a disk location. Perhaps you will want to write the data to a floppy disk or a CD-Rom disk so that you can pass the data to another computer with the Go Events software. The system writes a text based file named like “events_<timestamp>.dat”. If you would like to view the data, it can be opened with your text editor or word processing application.

Important Note: The exchange (or sharing) of data with the Go Events system is implemented through the Import / Export technology. This technology is designed so that ONLY ONE USER EDIT’S THE MASTER SET OF DATA. In other words, there cannot be two users (two copies of Go Events) who add registrations. The two sets of data cannot be “merged” into one master set of data. The data should be thought of as a “baton” that is passed from user to user (computer to computer). Also see “Importing Data” (next subject).

Importing Data

The Import data feature is designed to consume the data that is output by the Export Data feature. Please read the section above regarding Exporting Data.

The import data feature is useful for getting a set of Go Events data from a another user of the system. It can also be used to recover Go Events data after a computer hardware failure.

The Import Data feature is found on the menu bar under “Data”. When using the Import Data feature, use the “drive”, “directory”, and “files” fields to find a file that is named like “events_<timestamp>.dat”. This is a proprietary file formatted specifically for the import / export functionality of the Go Events system.

Appendix A: Go Events Terminology

Event - A conference, workshop, meeting, etc... This is what the user is organizing when using this system.

Registration - This represents a person or group attending the event. Someone who signs up or purchases tickets, membership, goods, or services for the event.

Vendor - An organization or individual who provides goods or services at the event. Examples: A curriculum/book seller. A food caterer.