SPMS registration

JACoW Team Meeting 2010 - BNL

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Terminology

- Registration: confirmation of attendance and preferences expression
 - Prerequisite: to have an SPMS account
 - Does not include personal data (!)
 - Profile implicitly is available to conference org.
- Fields: single questions, items in the registration form
- Field groups: sets of fields for logical organisation

In a page...

- Select which fields to have
- Organise them in an ordered sequence
- Describe what is requested design the page
- Include images etc.

... several fields

- Data type: Date, Fee, Fee/mult, Number, Sponsorship, String
- Display/input type: checkboxes, Multi-line text, Multi input text, Popup, Textbox, Yes/No

- Only a few combinations are possible

- Fee handling: assign a (couple of) value(s) to registration 'items'
- Describe properties: Required, encryped, frozen, single, etc.

Fees

- Early / Late with a "Late fee cutoff"
- Grace period as a system parameter
- Counts made by the system
- Reports about method of payments etc.

Data / Display Types

HIII				Display Typ)e		
		Checkboxes	Multi Input Text	Multi-line Text	Popup	TextBox	YesNo
Data Type	Date			??	ΟΚ	ОК	3111
	Fee	ОК		ΟΚ	ΟΚ	ОК	ΟΚ
	Fee/Mult			??	ΟΚ	ΟΚ	:
	Number	ΟΚ		??	ΟΚ	ΟΚ	
	Sponsorship		ОК				
	String	ΟΚ		ΟΚ	ΟΚ	ОК	ΟΚ

If not null, apply the fee (no MULT) multiple fees possible w/ Checkboxes

	Legenda
??	Works, but useless
	Nonsense
ΟΚ	Yes, go on with me!

Methods of payment

- First, define the Payment Types
 - Whatever you want!
 - Input instructions for payments
 - Assign a payment cost for budget reports
 - Define access
- Special Types
 - WAIVE flag
 - Credit cards (online process)

Online Process Payments

- More things to define
 - Define Payment Vendors
 - Select a Payment Vendor in the System
 Parameters
 - Define Payment Vendor Variables
 - Hidden vars: From SPMS to the CC Vendor
 - Return vars: From the CC Vendor to SPMS
 - Unique ID always needed
 - Amount also could be useful...
 - Invoice also needed to come back

Reinboursements

- The system can trace all the money transfers
 - Automatically (Online Process)
 - Manually (Cash, Bank Transfer, etc.)
- A reinboursement actually is a transaction
 - We need to trace it
 - Record it by using a minus sign before the amount
- Not possible to actually delete transactions by choice

Receipts

- Online, dynamic, "evolving"
- The Registration Manager can print all the receipts in one shot
- Export to CSV (Comma Separated Values) for custom receipts/fiscal invoices

SPMS ACCOMMODATION MODULE

SPMS ACCOMMODATION MODULE - Overview

The system provides some features that allow:

- final user to book a room for a specified period (the rooms are grouped by the hotel category and room service, then for deposit due);
- the accommodation manager to manage room allotting, to process deposit payments, to create vouchers;
- Data export for financial checks or rooming lists for hotel summaries
- Statistical reports

The accommodation manager menu features:

- Available Hotels
- Available Services
- Available hotel categories Open All Close All
- Data Export
- Deposit List
- Hotel confirmation list
- Hotel notches
- Payments methods choic
- Summary statistics

😒 EPAC08 / Accommoda... 🛛 💿 EPAC 2008 Abstra

EPAC 2008 Abstract List

Submit A New Abstract No Abstracts on fil + Caltor/Proceedings Administration General Hotel Administration Available Hotels Available Services Available hotel categories Data export Deposit List Hotel confirmation list Hotel notches Payment methods choice Process deposit payment Summary statistics Overall Database Administration + Cegistration

Please contact the <u>EPAC 2008 Database Administrator</u> with q SPMS Author: Matthew Arena — Fermi National Accelerator L

Available service

EDIT

- Add, edit and delete the available services that the hotels can offer (single room, double room, ...)
- A room can be related to more than one services

EPAC 2008 Available Room Types

DROP



Available hotel categories



Deposit list

 Define for each hotel categories and for each services the deposit due

Hotel category 3 star	
♂ Service type DBL ∨	
Deposit 150	
ιble auto update 🛛 🖌	
Save	
	_

🔇 EPAC08 / Accom 🛛 💿 EF	PAC 2	2008 Depos	🛛 🕖 SP	MS-DE\	/ Confir 🛛
EPAC 2008 Depos	it l	ist			
Open All Close All		Category	Room Type	Deposit	Data Update
SPMS	1	2 star	DUS	76	<u>Manual</u>
	1	3 star	DBL	150	<u>Manual</u>
⊡ Hotel Administration 	1	3 star	DUS	130	Manual
Available Services	1	3 star superior	DUS	149	<u>Manual</u>
Data export	1	3 star superior	SGL	121	<u>Manual</u>
Deposit List Hotel confirmation list	1	3 star superior	DBL	158	<u>Manual</u>
Hotel notches	1	4 star	DUS	160	<u>Manual</u>
Payment methods choice Process deposit payment	1	4 star	DBL	190	<u>Manual</u>
Summary statistics	1	4 star superior	DUS	185	<u>Manual</u>
E	1	4 star superior	DBL	225	<u>Manual</u>
⊕ Scientific Program Administration	1	5 star	DUS	159	<u>Manual</u>
	1	5 star	DBL	184	<u>Manual</u>
	ł				

Payments methods choice

Set-up which type of payment (specified in registration module) it is possible to use in deposit payment

EPAC 2008 Available Payments



Available Hotels

	V	vebs	Ite	Select hotel category	4 star
Hotel Name	Category	Phone Numb	out Sea	Hotel director	
est Western City Hotel	4 star	0039 010 584707	DBL DUS	National id Number Address	
est Western Metropoli	3 star superior	0039 010 2468888	B DBL DUS	Add. Number	Via San Sebastiano
			SGL Assoc	Town	Genoa
rand Hotel Savoia	5 star	0039 010 261641	DBL	Province	GE
			Assoc	Country	Italy
				VAT id number	
				Phone	0039 010 584707
				Fax	0039 010 586301
				E-mail	mauro.marenco@bestwestern.it
				Website	www.bwcityhotel-ge.it
				Description	

Available Hotels

 Add, edit, drop Hotel: name, description, category, web site, …

- Accordiate available convirac to each hotal

3	Hotel Name	Category	Phone Numb.	Services	Rooms	Hotel Notches	
1	Best Western City Hotel	4 star	0039 010 584707	DBL DUS Associate/Modify	40 Modify/Remove	<u>Show</u>	×
1	Best Western Metropoli	3 star superior	0039 010 2468888	DBL DUS SGL Associate/Modify	30 Modify/Remove	<u>Show</u>	×
1	Grand Hotel Savoia	5 star	0039 010 261641	DBL DUS Associate/Modify	30 Modify/Remove	<u>Show</u>	×

Available Hotels

- Add, edit, drop Hotel: name, description, category, web site, ...
- Associate available services to each hotel

- Manage the hotel rooms

Room id	Booking status	From	То	Registrant	Description	Start Date	End date	Configurations	
35	Conf:N First choice	22-JUN-08	27-JUN-08	Rowland James		21-JUN-08	28-JUN-08	DBLIDUS	1
36	Conf:N First choice	22-JUN-08	25-JUN-08	Del Bianco Massimo		21-JUN-08	28-JUN-08	DBLIDUS	1
37						21-JUN-08	28-JUN-08	DBL DUS Modify/Remove	×
38						21-JUN-08	28-JUN-08	DBL DUS Modify/Remove	×
00		İ	İ						Shin Ma
									W

Available Hotels

- Add, edit, drop Hotel: name, description, category, web site, ...
- Associate available services to each hotel
- Manage the hotel rooms
- Show the rooms status
 - Listing all the hotel rooms
 - Hotel notches

te

Hotel notches

This feature show the room status during the room availability period (free, booked), for a selected hotel.

Also show the person who booked the room and the services requested.

The name in italics means no confirmation yet (by the accomodation manager)

Hotel	leiv	/etia	etia JUNE 22 23 24 X X								
			a JUNI 23 24 X X X X X X X X X X X X X X X X X X X		/200						
Person/day	21	22	23	25							
D	US										
152 - Keil Boris	oris -										
153 - Heine Robert	-	×	×	×	X						
154 - Bousonville Michael	-	×	×	×	X						
S	GL										
155 - Hanna Samy	-	×	X	×	X						
D	BL										
156 - Loboda Alexandre	-	×	×	×	X						
D	US										
157 - Mathot Serge	-	×	×	×	X						
158 - Nolden Fritz	-	X	X	X	X						
SGL											
159 - Artoos Kurt	-	×	X	X	X						
DBL											
160 - Namkung Won	-	×	X	X	X						
D	US										
161 - Koenig Hans	-	×	X	X	X						
162 - Zimmermann Frank	-	×									
163 - Angelova Gergana	-	X	X	X	X						
164 - Luedeke Andreas	-	X	X	X	X						
165 - Casagrande Fabio	-	X	X	X	X						
D	BL										
166 - Trubnikov Grigory	Х	X	X	X	X						
	Hotel I Person/day D 152 - Keil Boris 153 - Heine Robert 153 - Heine Robert 154 - Bousonville Michael D 155 - Hanna Samy D 155 - Hanna Samy D 156 - Loboda Alexandre D 157 - Mathot Serge 158 - Nolden Fritz D 159 - Artoos Kurt D 160 - Namkung Won D 161 - Koenig Hans 162 - Zimmermann Frank 163 - Angelova Gergana 164 - Luedeke Andreas 165 - Casagrande Fabio D 166 - Trubnikov Grigory	Hotel Heix Person/day 21 Person/day 21 DUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUU	Hotel HelvetiaPerson/day2122Person/day2122152 - Keil Boris.X153 - Heine Robert.X154 - Bousonville Michael.X155 - Hanna Samy.X155 - Hanna Samy.X156 - Loboda Alexandre.X157 - Mathot Serge.X158 - Nolden Fritz.X159 - Artoos Kurt.X160 - Namkung Won.X161 - Koenig Hans.X162 - Zimmermann Frank.X163 - Angelova Gergana.X164 - Luedeke Andreas.X165 - Casagrande Fabio.X166 - Trubnikov GrigoryXXXX	Hotel HeivertiaPerson/day212223Person/day212223DUSDUSDUS2424152 - Keil Boris-XX153 - Heine Robert-XX154 - Bousonville Michael-XXDUSDUSXX155 - Hanna Samy-XX155 - Mathot Serge-XX157 - Mathot Serge-XX159 - Artoos Kurt-XX160 - Namkung Won-XX161 - Koenig Hans-XX162 - Zimmermann Frank-XX163 - Angelova Gergana-XX164 - Luedeke Andreas-XX165 - Casagrande Fabio-XX166 - Trubnikov GrigoryXXX	Hotel Heitvetia Person/day 21 22 23 24 Person/day 21 22 23 24 IS2 - Keil Boris . X X X X 153 - Heine Robert . X X X X 153 - Heine Robert . X X X X 154 - Bousonville Michael . X X X X 155 - Hanna Samy . X X X X X 156 - Loboda Alexandre . X X X X 157 - Mathot Serge . X X X X 158 - Nolden Fritz . X X X X 159 - Artoos Kurt . X X X X 160 - Namkung Won . X X X X 161 - Koenig Hans . . X X X X 1						

Data Export: csv file to use for:

Pre Sele	ection			
Rooming	List (confirmed	l choices or first ch	noice if there are no cor	nfirmed cho
Hotel Filt	er All		~	
🔿 Financial	Check (all proc	essed or reverse	d record)	
🗆 Cons	sider deleted re	versed records		
O Filter cl	noices			
Confirmed	O Yes	O No	Both]
Processed	Yes	O No	Both	
Reversed	O Yes	O No	Both	
Choice Order	First Choice	e 🔲 Second Ch	10ice 🔲 Third Choice	•
export				

Rooming List

the file will be used as a summary list of booked rooms.

Financial Check

the file will be managed by the accounting department, it contains all payments fields

It is possible to export partial data, according to a selected filter

Summary statistics

for each hotel category the report showes

- The number of booked, free and total rooms
- The process status (processed, only confirmed, to confirm

- Payments statistics arouned by method of

navmo		Rooms			Booking process					
payme	otel Categories	Booked rooms	Free rooms	Total rooms	Processed	Only Confirmed	To be confirmed	Total booking		
	star	160	3	163	156	0	3	159		
	star	37	-2	35	34	1	2	37		
	star	79	0	79	78	1	0	79		
	star superior	29	1	30	29	0	0	29		
	star superior	45	1	46	45	0	0	45		
	lethods of paym	ent Due P	rocessed Pe	ending Reve	rsed	Reversed				

lethods of payment	Due	Processed	Pending	Reversed	Reversed (with reversed deleted record)
redit Card	44609	44459	150	150	150
ank Transfer	14675.29	13663.29	1012		

Hotel Confirmation List

Move to another room

					type		/		j	,	,			
	<u>Move</u>	Keil Eberhard	2 Hotel Bristol Palace	4 star	418 DUS	N	22-06-2008	27-06-2008	28-03-2008	<u>28-03-2008</u>	Credit Card <mark>Details</mark>		<u>Add</u>	×
<u>Reverse</u>		Kelliher David	1 Hotel Bristol Palace	4 star	406 DUS	Y	22-06-2008	<u>28-06-2008</u>	13-03-2008	<u>13-03-2008</u>	Credit Card Details	Show	<u>Add</u>	1
Reverse		Ko In Soo	1 Hotel Continental	4 star	551 DUS	Y	22-06-2008	28-06-2008	28-02-2008	28-02-2008	Credit Card Details		<u>Add</u>	1
	Move	Koenig Hans	1 Hotel Helvetia	3 star	161 DUS	N	22-06-2008	27-06-2008	29-02 2008 Sh		vmont	s de		ilc
	Move	Koenig Hans	2 Best Western Metropoli	3 star superior	284 SGL	N	22-06-2008	27-06-2008	29-0 Vo	.5 U(
	Move	Koenig Hans	3 Hotel Astoria	3 star	111 DUS	N	22-06-2008	27-06-2008	29-0			J,		•
<u>Reverse</u>		Kotzian Gerd	1 Hotel Astoria	3 star	108 DUS	Y	22-06-2008	27-06-2008	06-02-2008	Add	edit Card Details		Add	1
Reverse		Koutchouk Jean-Pierre	1 Hotel Continental	4 star	559 DUS	Y	22-06-2008	27-06-2008	18-03-2008	<u>18-03-2008</u>	Credit Card Details	Show	<u>Add</u>	1
<u>Reverse</u>		Kramer Stephen L.	1 Hotel Bristol Palace	4 star	400 DBL	Y	22-06-2008	<u>27-06-2008</u>	13-02-2008	<u>13-02-2008</u>	Credit Card <u>Details</u>		<u>Add</u>	1
Procest	Move	Kupferberg Saul	1 Hotel Jolly Marina	4 star superior	186 DUS	Y	21-06-2008	26-06-2008	28-03-2008	<u>28-03-2008</u>	Credit Card Details		<u>Add</u>	1
Reverse		Kurenn oy Sergey	1 Hotel Continental	4 star	552 DBL	Y	21-06-2008	28-06-2008	28-02-2008	28-02-2008	Credit Card <u>Details</u>		<u>Add</u>	1
		Proce	ss paymen	it	1000		Cha	ange	reserv	vation	perio	d		

SPMS ACCOMMODATION MODULE – Final user side

- One room booked for each work session
- The user doesn't communicate directly with the hotel but he sends the request to the accommodation Manager

SPMS ACCOMMODATION MODULE – Final user side



SPMS ACCOMMODATION MODULE – Final user side



SPMS ACCOMMODATION MODULE – The choices

- The system suggests and assigns the rooms that best fit the needs (minimum number of free nights)
- A room is consider booked for a specific period if there is a confirmed reservation or if there is a first choice by someone
- Only the hotel manager can reverse or modify a user booking choices (periods, rooms, ...)
- The number of possible choices is now three to be parametrized