EventFlow – User Guide

Created by: [YANDA] – 2025

Purpose: A guide to how to use EventFlow as a student organization member, approver, department director, venue manager, and administrator.

This guide explains the main actions available to different roles in EventFlow. It is meant to be shared with:

- Student organization members who submit event requests
- Approvers who review and decide on requests
- Department directors who oversee venues and managers
- Venue managers who configure venue details and requirements
- Administrators who manage users, departments, venues, events, and audit logs

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1. Getting Started & Roles Overview

1.1 Accessing EventFlow

EventFlow is the platform used to submit, approve, and manage events across the institution. Depending on your role, you'll see different menu options and tools.

Typical steps to access EventFlow:

1. Open the EventFlow web address in your browser (Chrome or Edge recommended).
2. Click the **Login** link in the navigation bar.
3. Use your institutional credentials (university account) to sign in.

> **Important:** Some tools (like event requests, approvals, or admin screens) are only available after you sign in and only if you have the correct role.

1.2 Roles in EventFlow

EventFlow includes several roles, each with different capabilities:

- **Student Organization Member** – creates and manages event requests for a student organization.
- **Advisor** – comes from Nexo. Reviews and decides on event requests.
- **Approver** – reviews and decides on event requests.
- **Department Director –** sees department venues and manages department managers.
- **Venue Manager** – configures venue descriptions, availability, and use requirements.
- **Administrator** – manages users, departments, venues, events, and audit logs.

The rest of this guide is organized by role, so users can focus on the sections that apply to them.

2. Student Organization Actions

This section is for students who submit event requests on behalf of a student organization. You will mainly use:

- **Create Event Request**
- **My Requests**
- **Event Details** (for a specific event)

2.1 Create Event Request

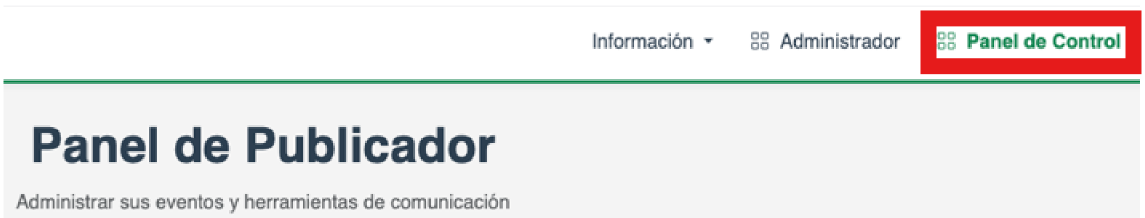
Where to find it: After logging in, click **Initiate Request** (or the equivalent "Request Event" button).

Purpose: A step-by-step wizard used to submit a new event for approval.

After clicking the **Initiate Request** button, you will be redirected to **Nexo**.

Nexo:

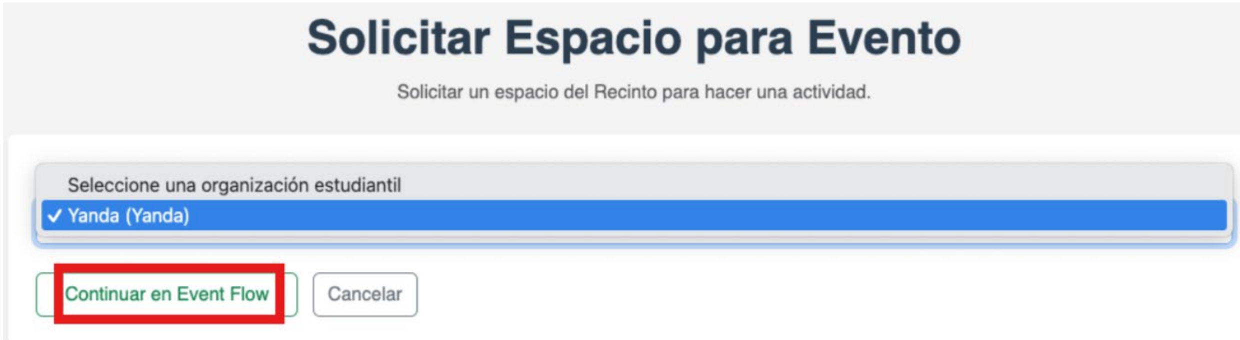
1. On Nexo, click the "**Panel de Control**" button to access the control panel and solicit a space for an event.



2. To solicit a space for an event, click the "**Solicitar espacio para actividad**" button.

3. **Choose** your student organization from the dropdown.

4. **Confirm** your student organization by clicking the "**Continuar en EventFlow**" button and you will be **redirected** to the create event form.



The form normally has three steps:

1. **Event** – basic information about the event and your organization.
2. **Venue** – choose an available venue for your date and time.
3. **Documents** – upload required or supporting PDFs.

Step 1 – Event

In this step you provide the core details of your event:

- **Student Phone** – your contact number.
- **Student ID / Number** – your institutional ID.
- **Event Title** – a clear, descriptive name.
- **Event Description** – summary and purpose of the event.
- **Start date & time** and **End date & time**.
- **Estimated attendance** – how many people you expect.
- **Categories** – one or more labels (such as Workshop, Meeting, Seminar).
- **Organization** – your student organization (usually prefilled).
- **Advisor name, email, phone** – often prefilled from your profile.

Event attributes (policy checkboxes):

- This event is to sell food
- This event uses institutional funds
- This event has an external guest

These options help determine which documents may be required later (for example, permits or forms).

Step 2 – Venue

In Step 2 you see a list of venues that are available for the date and time you chose in Step 1.

Typical filters:

- Search by **name or code** (e.g., “AE-102”).
- Minimum **capacity** – only show venues large enough for your event.
- **Department** – show venues owned by a specific department.

The venue cards usually show the venue name, room code, capacity, department, and a short description. Select the venue you want to use and continue to the next step.

> **Tip:** If you go back to Step 1 and change the date or time, then return to Step 2, the venue list refreshes to match the new schedule.

Step 3 – Documents

In Step 3 you upload any required documents. Requirements may depend on the venue and the event attributes (food, funds, external guests).

- You may see a list of **required documents** with brief descriptions.
- The system may require at least one file before letting you submit.
- Uploads are typically **PDF only**, up to a size limit (for example, 10 MB per file).
- You can remove individual files before submitting the form.

When all steps are valid, click **Submit**. Your event enters the approval process and will appear in **My Requests**.

2.2 My Requests

Where to find it: Use the main navigation and click **My Requests**.

Purpose: View all events you have requested and see their current status.

Filters

- **Search** – by event title or organization name.
- **Sort by date** – newest first or oldest first.

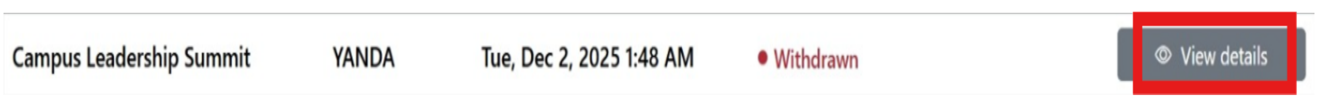
Typical columns

Column	What it shows
Title	Name of the event.
Organization	Student organization that submitted the request.
Date Submitted	When the request was created.
Status	Current status, often color-coded, for example: **Approved / Completed Pending / In review Cancelled / Withdrawn / Rejected**

Use the **View Details** action for any row to open the full event details page.

2.3 Event Details (Student View)

The event details page shows everything about a specific request and allows you to cancel or withdraw it (if permitted by the current status).



Information you will see

- **Header** – event title, scheduled date and time, and status badge.
- **Schedule & Venue** – venue name, room code, and description.
- **Organization & Requester** – your name/email, organization, advisor info, and date submitted.
- **Event Attributes** – whether the event sells food, uses funds, or has external guests.
- **Categories** – list of all categories applied to the event.

- **Documents** – list of files attached with options to view or download.

Cancel or Withdraw

- If the event is **approved**, you see a **Cancel** button.
- If the event is still **pending**, you see a **Withdraw** button instead.

Click the button, write a short justification, and confirm. The status will change, and the updated request remains visible in **My Requests**.

2.4 Quick Tips for Student Organizations

- Submit your event request early—approvals and venue availability can take time.
- Fill in advisor and contact details carefully, as approvers may need to reach you.
- Check **My Requests** periodically to follow your event's progress.
- Use **Cancel** or **Withdraw** if your plans change instead of creating duplicate requests.
- Keep copies of important documents and permits for future events.

3. Approver & Advisor Actions

This section is for users who review and decide on event requests. You will mainly use:

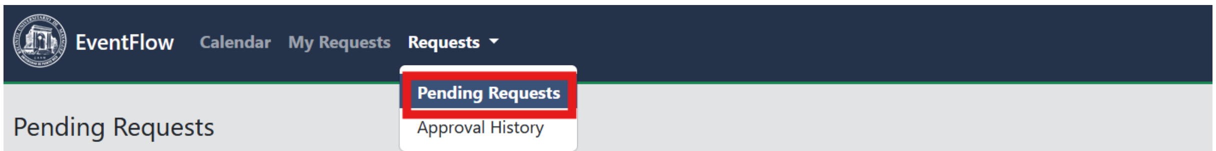
- **Requests** menu:
  - **Pending Requests**
  - **Approval History**
- **Categories** (reference list)
- Event **Details** pages for specific requests

3.1 Navigation for Approvers

When you are assigned approver roles, you usually see additional links in the navigation bar, for example:

- **Requests ▾**
  - **Pending Requests** – your "inbox" of events waiting for a decision.
  - **Approval History** – decisions you have already made.
- **Categories** – read-only list of event categories.

3.2 Pending Requests



Purpose: Show all events that still need your action.

Filters

- **Role** – filter by one of your roles (for example, "Department Director" or "Venue Manager"). Leave blank to see all pending items.
- **Search (title or organization)** – narrow by event title or organization name.
- **Sort Direction** – newest first or oldest first.

> **Tip:** After changing filters, the list usually jumps back to page 1, so you see all matching events.

Table

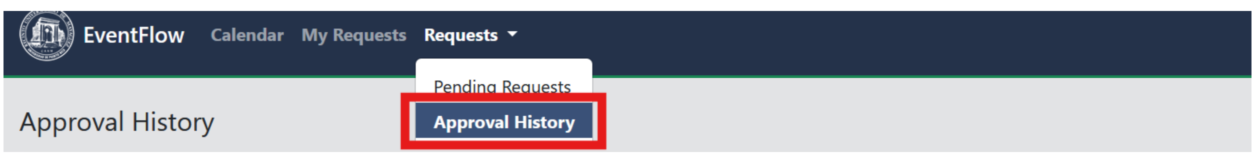
Column	What it shows
Title	Event title.
Organization	Student organization or group who requested the event.
Date Submitted	When the request was created.

Status	Overall event status, often using colored labels: **Green – positive final, states Red – negative final, states Yellow – pending/in-review**
Actions	Button or icon to open event details.

Reviewing and deciding on a request

1. From **Pending Requests**, find the event you want to review.
2. Click **View Details** in the Actions column.
3. Read the event information, schedule, venue, documents, and previous approvals.
4. Choose the appropriate action (for example, **Approve**, **Reject**, or **Request changes**), and provide justification if required.
5. Submit your decision. The item will disappear from your Pending list when your step is complete.

3.3 Approval History



Purpose: Let you review the events you have already acted on.

Filters

- **Action** – show only Approved, Rejected, or Cancelled actions you performed.
- **Search by title/organization** – narrow the list by event name or organization.
- **Sort Direction** – most recent actions first or oldest first.

Table

Column	What it shows

Title	Event title.
Organization	Organization that requested the event.
Action	What you did (Approved, Rejected, Cancelled).
Date Submitted	When the original event request was created.
Actions	Button or icon to open details of the event and your decision.

Inspecting a past decision

1. From **Approval History**, locate the event.
2. Click **View Details**.
3. Review event details, your recorded decision, and any notes or justification you entered.

3.4 Categories (Event Approver View)

Purpose: Provide a reference list of categories approvers can use when advising students or reviewing events.

Where to find it: In the top navigation bar, click **Categories**.

- Shows the list of available categories (e.g., Workshop, Seminar, Social Activity).
- May include a short description for internal use.
- For most approvers this is **read-only**: creation and maintenance of categories is handled centrally.

Filters

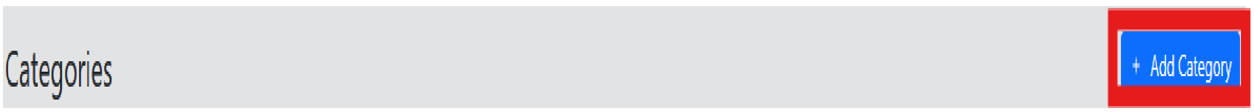
- **Search** – filter categories by name.
- **Clear** – reset the search.

Table columns:

- **Name**
- **Actions**

Adding and editing categories

- To add a category:
    1. Click **Add Category**.



    2. Enter a descriptive category name (e.g., “Workshop”).
    3. Click **Create Category**.
- To edit an existing category:
    1. Click the **Edit** button in its row.

    2. Update the **Name**.
    3. Click **Update Category**.

Deleting categories

1. Click the **Delete** (trash) button for the category.

2. Confirm the deletion in the confirmation dialog.
3. Provide a justification (minimum text length).
4. Click **Confirm** to finalize deletion.

   Note: Deleting a category can affect existing events that use it. Consider choosing a replacement category first.

3.5 Tips for Approvers

- Treat **Pending Requests** as your work queue.

- Use **Approval History** when someone asks, “Did you approve this?” or for audits.
- Filter by **role** if you manage multiple responsibilities.
- Use the **Categories** page as a reference to keep category usage consistent.
- Provide clear, concise justifications for decisions to help students and auditors understand outcomes.

4. Department Director Actions

This section is for department directors who oversee venues and manage department-level staff. You will mainly use:

- **My Departments → Venues & Managers**

4.1 Venues & Managers Page

Purpose: See all venues belonging to your department and manage department managers.

The page is usually divided into two areas:

1. **Venues** – a list of all teaching/event venues in your department.
2. **Department Managers** – a list of users who act as department managers.

Venues section

In the Venues section you will see a table:

Column	What it shows
Name	Venue name.
Room	Venue code (for example, AE-102).

Capacity	Normal seating capacity.
Test Capacity	Seating capacity used during exam periods (if configured).

A summary at the bottom shows the total number of venues and pagination controls.

> **Note:** The Venues section here is read-only. Edits to descriptions, hours, and requirements are done in the **Venue Manager** tools.

Venue Managers section

This section lists people who have manager responsibilities for your department. Typical columns:

- **Name** – first and last name.
- **Email** – institutional email address.
- **Actions** – options such as *Remove manager*.

If there are no managers yet, you will see a message indicating that the list is empty.

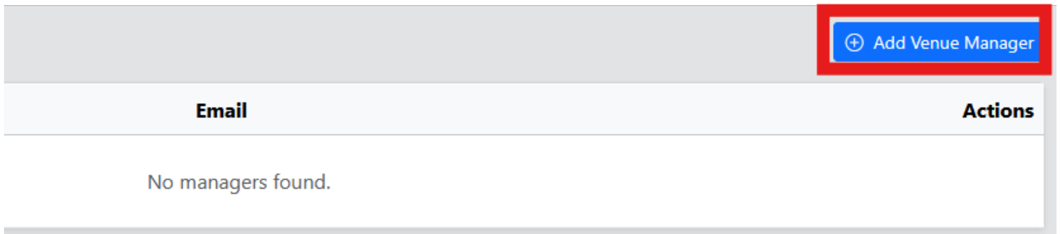
4.2 Removing a Venue Manager

1. In the **Venue Managers** table, find the person you want to remove.
2. Click the **Remove** (trash icon) in the Actions column.
3. Review the confirmation message, then confirm removal.
4. The list refreshes and the user is no longer listed as a department manager.

4.3 Adding a Venue Manager

Department directors can add new department managers using the **Add Manager** button.

1. At the top of the Venues & Managers page, click **Add Manager**.



2. In the dialog, enter the user's **institutional email address**.
3. Re-enter the email to confirm (to avoid typos).
4. Submit the form to add them as a manager.

If the system finds an existing user, it links the manager role to that account. If needed, a new user record will be created.

4.4 Handling Department Transfers

If the email you entered belongs to a user who is already associated with another department, the system will show a **Confirm reassignment** dialog:

- It shows their current department.
- It warns that continuing will move the user to your department and add them as a manager.

You can then either:

- Click **Back** to cancel, or
- Click **Reassign & Add Manager** to proceed.

4.5 Tips for Department Directors

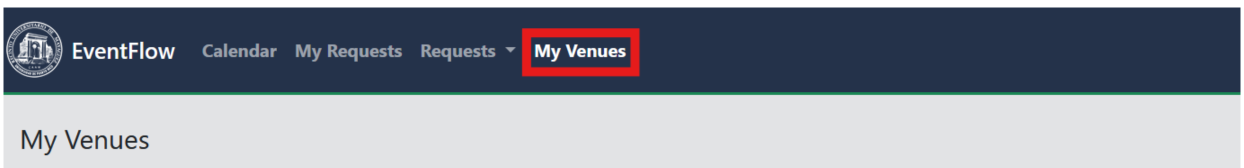
- Always Ensure at least one active Department Manager, so venues remain well-managed.
- Coordinate with other departments before reassigning staff who may also be working elsewhere.
- Review your venues periodically to confirm they still belong to your department and are configured correctly by venue managers.

5. Venue Manager Actions

This section is for venue managers who configure venue details, availability, and use requirements. You will mainly use:

- **My Venues**
- **Venue Details**
- **Configure Venue**
- **Requests** menu:
  - **Pending Requests**
  - **Approval History**

5.1 My Venues



Purpose: Show the list of venues in your department and give you quick access to their configuration.

Common layout:

- Page title: **My Venues**
- Search bar to filter venues by name or room code
- Table with columns such as **Name**, **Room**, **Capacity**, and **Actions**

Searching for a venue

- Type part of the venue name or room number in the search box.
- Click **Search** or press Enter.
- To reset, clear the text and search again.

Use the pagination controls at the bottom to move through multiple pages of venues.

Actions per venue

- **Configure** – opens the configuration page where you can edit description, hours, and requirements.
- **View details** – opens a read-only summary of the venue.

5.2 Venue Details

Room	Capacity		Actions
DARL-DAR103A	0	Configure	View details

Purpose: Provide a read-only snapshot of how a venue is currently configured.

Information typically shown:

- **Name** – venue name.
- **Department** – owning department.
- **Capacity** – maximum number of seats.
- **Description** – text explaining layout, rules, or restrictions.
- **Weekly availability** – open/close times for each day that accepts bookings.
- **Features** – e.g., multimedia equipment, computers, online-teaching capabilities.
- **Use requirements** – forms or steps required when booking, often with links to documents.

Use this page to check what students and approvers see when choosing or reviewing the venue.

5.3 Configure Venue

Room	Capacity		Actions
DARL-DAR103A	0	Configure	View details

Purpose: Change a venue's description, booking hours, and required documents.

The configuration page is usually divided into two parts:

1. **Description & Weekly Availability**
2. **Use Requirements**

Description & Weekly Availability

- **Description** – add details about:
    - Room layout (lab, auditorium, classroom, etc.).
    - Special rules (for example, "No food or drinks").
    - Instructions for student organizations and approvers.
- **Weekly availability** – for each day of the week:
    - Check a box to allow bookings on that day.
    - Set an **opens** time (start of booking window).
    - Set a **closes** time (end of booking window).

Validation notes:

- If a day is enabled, its open and close times must be valid, and close must be after open.
- Days you leave disabled are treated as "not available" for bookings.

After editing, click **Save details** to store your changes.

Use Requirements

Purpose: Tell requesters what they must do (or what forms they must submit) to use this venue.

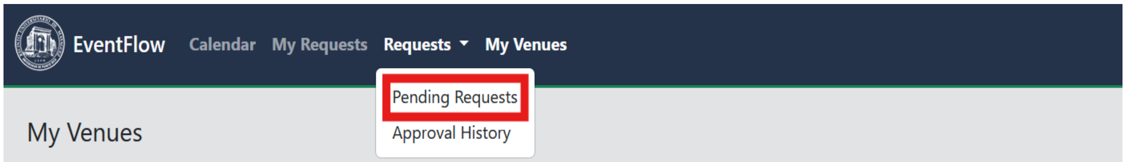
For each requirement, you can set:

- **Title** – short label (for example, "Safety Plan", "Food Handling Permit").
- **Guidance or checklist** – instructions in plain text.
- **Document link (URL)** – optional link to a form, PDF, or web page.

You can add, edit, or remove requirements. After making changes, click **Save changes**.

> **Tip:** Always test document links to ensure students can open them. Broken links can delay approvals.

5.4 Pending Requests



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Filters

- **Role** – filter by one of your roles (for example, "Department Director" or "Venue Manager"). Leave blank to see all pending items.
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Tip: After changing filters, the list usually jumps back to page 1 so you see all matching events.

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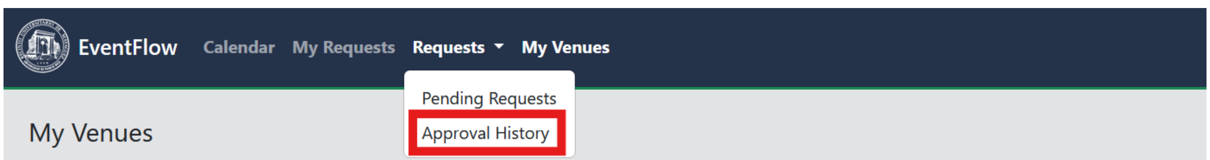
Reviewing and deciding on a request

6. From **Pending Requests**, find the event you want to review.

7. Click **View Details** in the Actions column.
8. Read the event information, schedule, venue, documents, and previous approvals.
9. Choose the appropriate action (for example, **Approve**, **Reject**, or **Request changes**), and provide a justification if required.
10. Submit your decision. The item will disappear from your Pending list when your step is complete.

5.5 Approval History



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Date Submitted	When the original event request was created.
Actions	Button or icon to open details of the event and your decision.

Inspecting a past decision

4. From **Approval History**, locate the event.
5. Click **View Details**.
6. Review event details, your recorded decision, and any notes or justification you entered.

5.6 Tips for Venue Managers

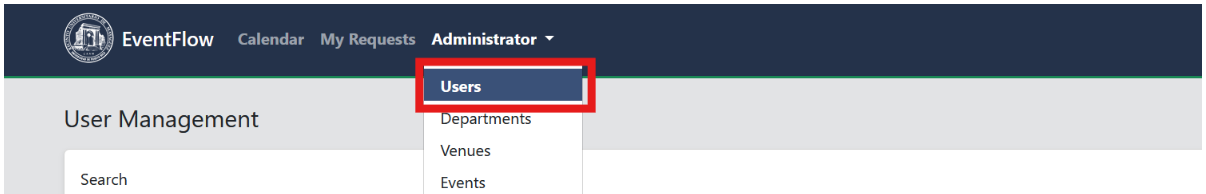
- Keep descriptions up to date, especially when a room is repurposed (e.g., from seminar room to lab).
- Set realistic availability times that match real operating hours and staffing.
- Use requirements to encode local rules, such as:
  - Permits for serving food.
  - Security or safety checklists.
  - Forms needed for external guests.
- Coordinate with administrators so major changes are properly reflected in system reports.

6. Administrator Actions

This section is for EventFlow administrators. Admins configure core data and oversee system usage. Key tools include:

- **Users**
- **Departments**
- **Venues**
- **Events** (system-wide event oversight)
- **Audit Log**

6.1 Users



Purpose: Manage user accounts, roles, and department assignments.

Filters

- **Search** – by name or email.
- **Role** – show only users with a specific role, or “no roles” users.
- **Rows per page** – how many users to show at once.

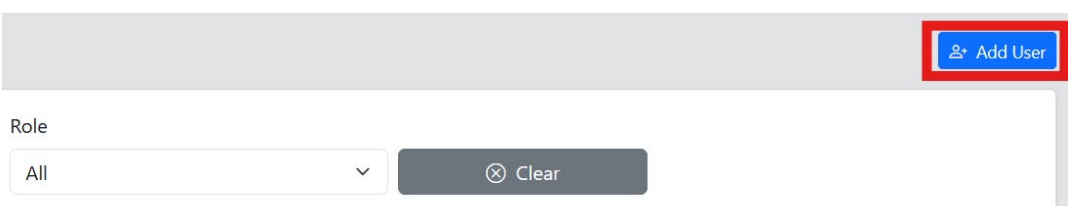
Key actions

- **Add User** – create a new user record.
- **Edit** – update an existing user’s details and roles.
- **Clear Roles** – remove optional roles from a user while keeping required base access.

How to use these actions

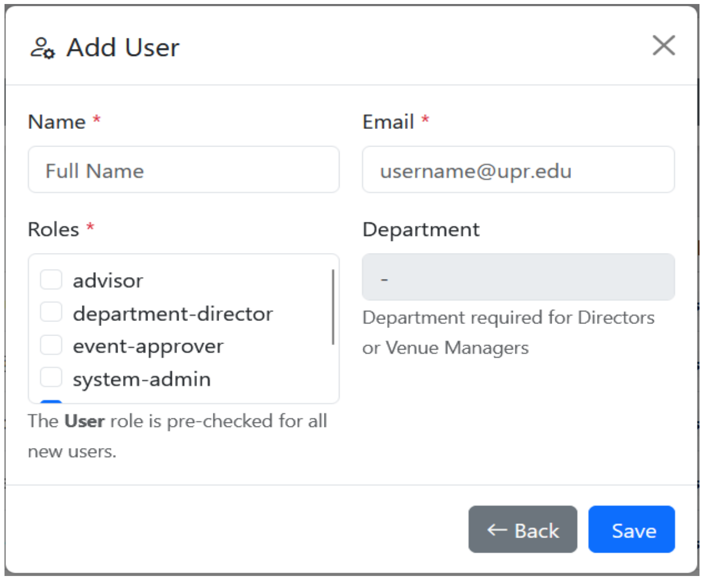
Add User

1. Go to the **Users** page in the Admin section.
2. Click the **Add User** button (usually at the top-right of the table).



3. Fill in the required fields, such as:
    - **Name** – full name of the user.
    - **Email** – institutional email address.
    - **Department** – department the user belongs to (if applicable).

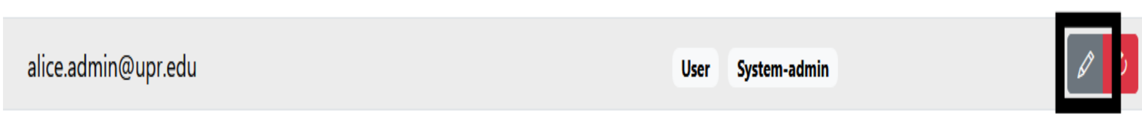
- **Roles** – check the roles the user should have (Student, Approver, Director, etc.).



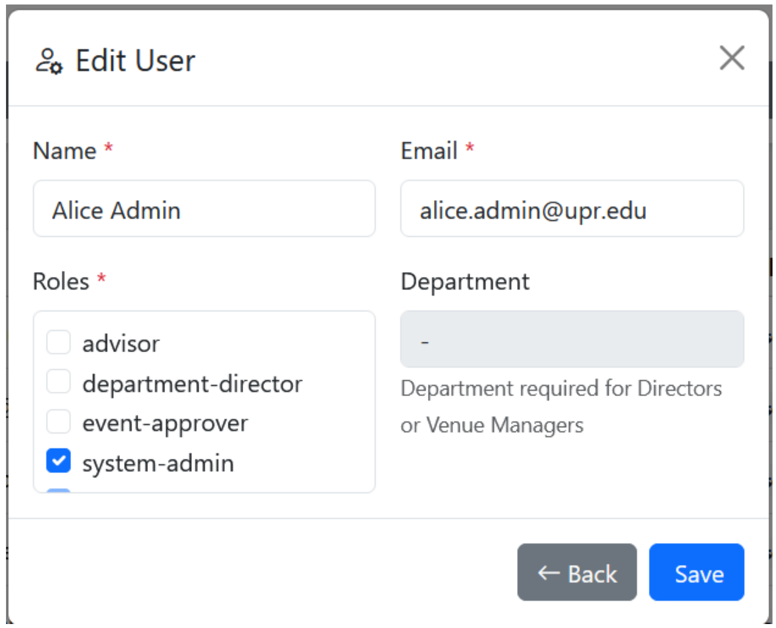
4. Click **Save** or **Create** to add the user.
5. Confirm that the new user appears in the Users list with the correct department and roles.

Edit an existing user

1. On the **Users** page, locate the user you want to edit (using **Search** if needed).
2. Click the **Edit** button or pencil icon in the Actions column.



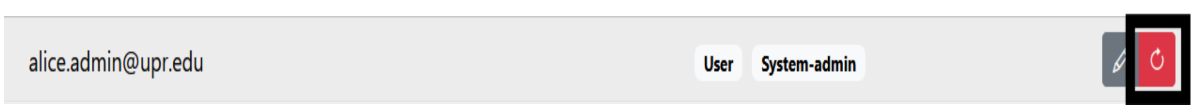
3. Adjust fields as required, such as:
    - Correcting spelling of the name.
    - Updating the email address if their institutional address has changed.
    - Changing the **Department** if the user moves units.
    - Adding or removing **Roles** to reflect new responsibilities.



4. Click **Save** to apply the changes.
5. **Justify** why the edit occurred.
6. Verify the new values in the Users table and, if relevant, notify the user that their access has changed.

Clear Roles

1. On the **Users** page, find the user whose roles you want to reset.
2. Click the **Clear Roles** button in the Actions column (often shown as a broom or similar icon).

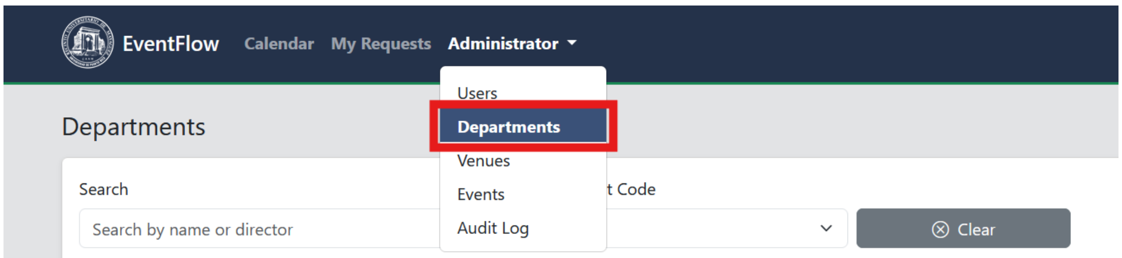


3. Read the confirmation message carefully. It normally explains that:
   - Optional roles (like Approver, Venue Manager, Director) will be removed.
   - Required base access (for example, “User”) will remain so the account is still valid.
4. Confirm the action if you are sure:
   - Click the **Confirm clear roles** button.
5. **Justify** why you clear roles
6. Check the **Roles** column for that user to make sure it reflects the new, reduced access.

> **Important:** Use **Clear Roles** when a user is changing jobs or leaving a position, but may still need basic access (e.g., as a regular student or staff member). For full account deactivation, follow your institution's account lifecycle policies.

> **Tip:** When adding or editing users, keep a short record (ticket, email, or change log) of who requested the change and why. This makes audits and troubleshooting much easier later.

6.2 Departments

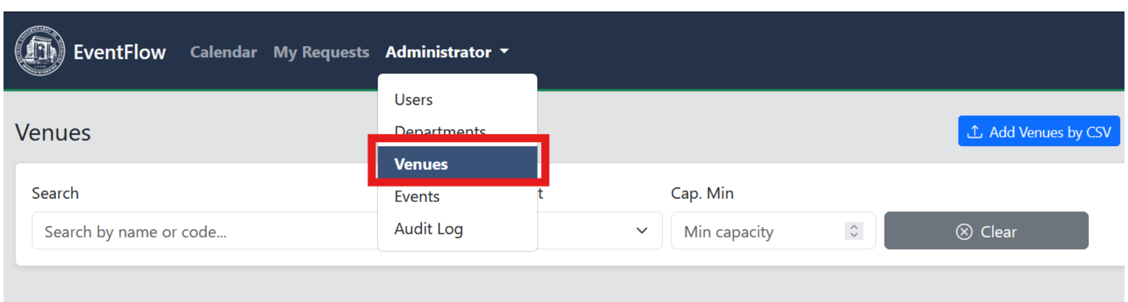


Purpose: View departments, their codes, and directors.

- Search by department name or director name.
- Filter by department code.

This view is usually read-only.

6.3 Venues (Admin View)



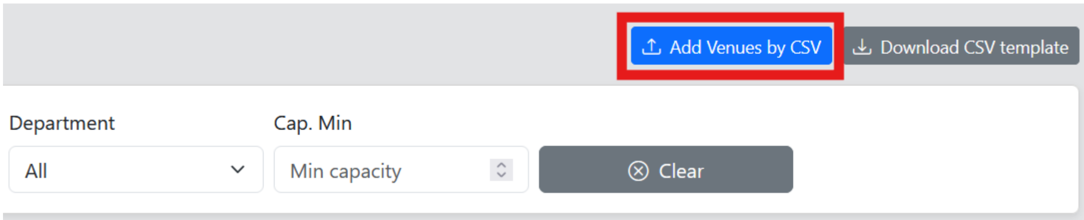
Purpose: Manage the master list of venues and bulk imports.

Filters

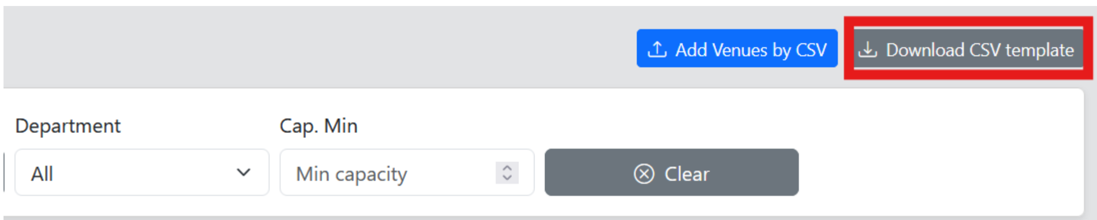
- **Search** – by venue name or room code.
- **Department** – limit results to a specific department.
- **Minimum capacity** – show only larger venues.

CSV Import (Add Venues by CSV)

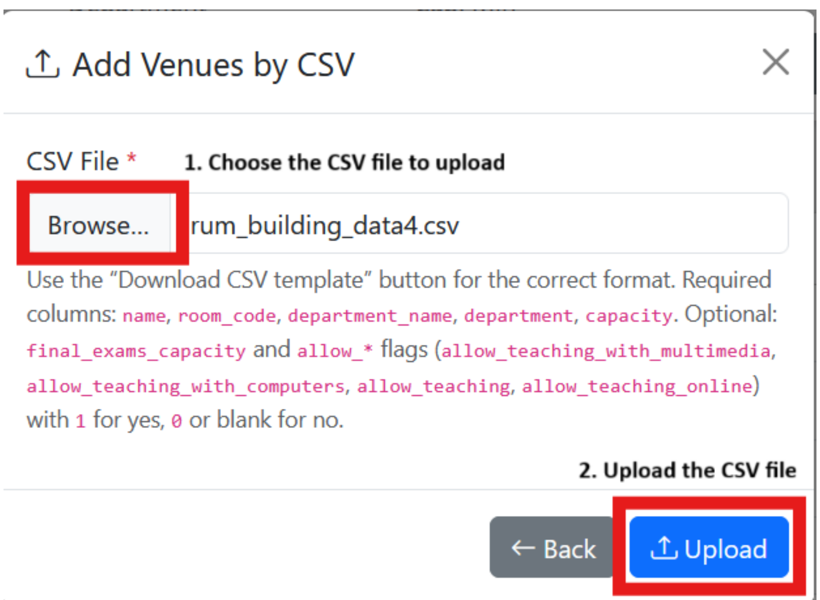
1. Click **Add Venues by CSV**.



2. Download the **CSV template** if needed.



3. Fill in each row with venue details (name, code, department, capacity, etc.).
4. Upload a complete CSV file.



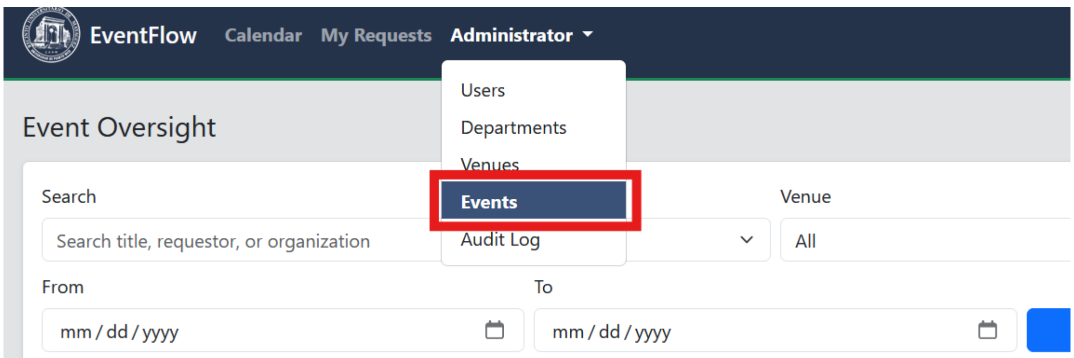
Typical required columns:

- `name` – full venue name.
- `room_code` – building and room (e.g., AE-102).

- `department_name` and `department` – full and short department identifiers.
- `capacity` – normal seat count.

Admin views also commonly include actions like **View details** and **Deactivate venue**. Deactivated venues no longer appear as options when students request events.

6.4 Events (System-wide Oversight)



Purpose: Allow administrators to view and manage events across the entire platform.

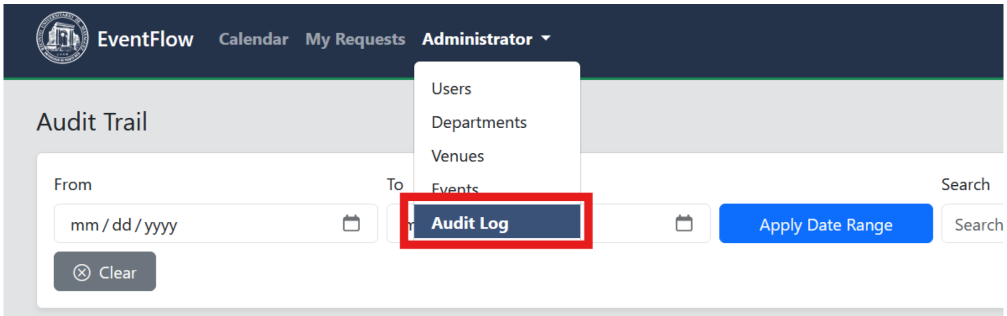
Typical filters

- **Search** – by title, requester, or organization.
- **Status** – show only pending, approved, cancelled, etc.
- **Venue** – limit results to a specific room.
- **Date range** – show events within a particular window.

Typical event actions

- **View** – open a read-only summary of event details and approvals.
- **Edit** – adjust schedule, venue, and other fields (according to policy).
- **Cancel** – cancel an event that is already approved (again, according to policy).

6.5 Audit Log



Purpose: Track who did what and when, for security and compliance.

Filters:

- **Date range** – see actions during a specific period.
- **Search** – by user, action, target, or IP.

Columns include:

- When the action occurred.
- Which user performed it.
- Short description of the action.
- Target item (such as a specific event or venue).
- IP address.
- Details

Some systems also allow exporting the audit log as a PDF or other format for sharing with auditors.

> **Admin tip:** Encourage all staff to use their own accounts (no credential sharing) so that the audit log remains accurate and trustworthy.
