User Guide

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THE PETRA USER GUIDE SET

General User Guide
Partner User Guide
Finance User Guide
Personnel User Guide
This guide Conference Management User Guide
Financial Development User Guide
System Manager Guide

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Document History

Personnel User Guide				
Version	**Date**	**Pages or Sections changed**	**Notes on Main Changes**	**Author / Editor**
2.0	1 Apr 02	All	New Version for Petra 2.0. Conference Management was previously part of the Personnel User Guide.	Ken Fitchew
2.1	1 Nov 04	All	Updated for Petra 2.1. Sites are now partners of class Venue; buildings/rooms assigned to a venue; accommodation costs can be added separately; extra costs can be recorded; arrival/departure groups added; sign-off changes in reports.	Ken Fitchew
2.2	1 Nov 07	All	Some changes made to reports. Arrival and Departure Groups added.	Ken Fitchew

PETRA Conference Management User Guide

Chapters

Detailed Table of Contents

----- End of Contents -----

Chapter 1 Introduction to Conference Management

1.1 Conference Management Introduction

1.1.1 What does Conference Management do?

Conference Management gives support to the functions of administering a conference. These include:

- **Conference Set-up** Planning a conference, including choosing the venue, setting the costs to be charged for attending (including discounts or supplements) and recording the rooms available for accommodation, together with any costs associated with them. The accommodation information entered here relates to the venue used for the conference and can be reused for later conferences. All this can be done without having any information on actual individuals who will attend the particular conference (attendees).
- **Conference Management** Loading details of all those attending; allocating them to the rooms previously entered in the accommodation set-up; printing badges; allocating work groups, etc; and recording arrival and departure times.
- **Reports** Producing reports to support the above functions, including allocating charges to sending fields.

1.1.2 Main Steps in Conference Management

The key steps in using PETRA to manage a conference are as follows:

1. **Identify the Conference** First it is necessary to select the conference you wish to manage. Conferences must exist as units (partners of class unit) before they can be selected, and most conferences are set up centrally by the PETRA team as units each year, so they will already be on your system. Local conferences or events can also be created on any individual PETRA installation by creating a suitable new unit. However, the name and Campaign Code must follow a standard format if PETRA is to recognise them as conference events. (For details, see Campaign Maintenance in the PERSONNEL USER GUIDE.)
2. **Set up the Conference** There are three main steps to setting up the conference. The first step is to identify the venue (the site where the conference will be held.) Venues are partners (of partner class “Venue”). The second step is to set up the charges for the conference (including discounts, supplements, etc. The third step is to set up the accommodation at the Venue (that is the buildings and rooms available and the number of beds in each room.) This accommodation information is stored with the Venue partner information, so it is loaded automatically when the venue is selected.
3. **Load Conference Attendees** Attendees must then be **loaded** into the conference management system. Why is this necessary? Sending fields send files containing details of attendees to the office administering the conference, and these are first imported into the local PETRA system. However, although these attendees now exist as partners on PETRA, they will not be included in the Conference Management system until the ‘Load/refresh attendees’ command is used. This looks for all partners on the system who are due to attend this particular conference, and enters them into the special Conference Management database. This allows the conference organiser to work with a stable list of people that he/she knows was correct at a certain time.

   The ‘Load/refresh attendees’ command needs to be used each time details of new attendees are sent to the conference administrator. The date of loading is called the registration date, and is used to calculate early-booking discounts, so all bookings received before an 'early booking date' should be loaded before that date to ensure that the discount is applied to their costs.

4. **Manage Conference** After some of the attendees have been loaded into the system, it is possible to start 'managing' the conference. Typical operations include: assigning attendees to rooms for accommodation, assigning attendees to groups, printing financial reports, recording arrival details, etc.

1.1.3 Conference Charges (Overview)

The conference Management module allows a range of options for setting conference costs and allocating charges to the sending field of the attendee. The cost charged may be thought of as follows:

Cost charged = (standard cost for attendance) – (discounts) + (supplements)
+ (accommodation) – (accomm. discount) *[If accom. charged separately]*
+ (extra costs)

The **standard cost** is the cost for a 'normal' attendee. It may be set up either as a cost per day, or a cost for a complete programme, such as a conference or 'conference + following campaign'. Since people attending a conference may often be going on to different campaigns of differing lengths, several different standard costs can be set up for programmes of different periods in length. The attendance cost may include accommodation, but if required, the accommodation for the conference can be charged separately (useful if room costs vary a lot.)

Discounts may be provided for full-time members, volunteers, children, those who register early, etc. Some discounts must be set as percentages, but others can be fixed amounts.

Supplements (extra costs) may be added for those attending campaigns with additional expenses or for those who book late (after a certain date).

Extra costs are additional non-standard costs, such as the cost of international phone calls.

More detail on how PETRA calculates costs is given in section 3.5, page 23.

1.2 Conference Management Menu Structure

To open the Conference Management Module, click on the Conference Management icon on the *Petra Welcome Screen*. The *Conference Management Welcome Screen* is displayed (Figure 1-1).

Figure 1-1 Conference Management Welcome Screen, showing menu bar options

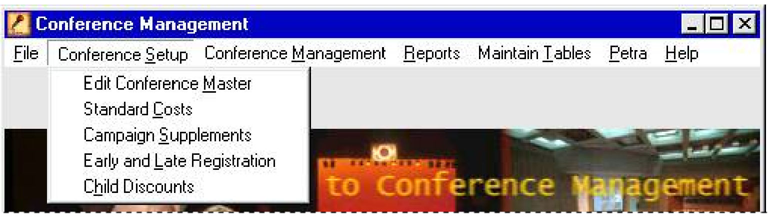
The menu bar of this screen shows the possible options for action, and instructions in this User Guide assume that you are starting from this screen.

- **File** allows you to select the conference that you wish to manage, to import and export accommodation details relating to rooms at the conference site, and to import or export details of attendees.

Figure 1-2 Conference Management Screen, showing File menu

- **Conference Setup** provides options for the preliminary work on setting up the conference (before any actual names are imported). This includes data on the venue, costs and accommodation available.

Figure 1-3 Conference Set-up menu on Conference Management Screen



- **Conference Management** is the heart of the system. It concerns managing all the attendees, based on the data set up in Conference Setup.

Figure 1-4 Conference Management menu

- **Reports** provides an extensive list of reports. It is a two-level menu, offering more options than are shown in Figure 1-5.

Figure 1-5 Reports Menu Options

- **Maintain Tables** allows you to set data used elsewhere in the Conference Management Module, in particular buildings and rooms for a venue, used in allocating accommodation, and Cost Types, which identify types of expenditure to be charged.

Figure 1-6 Reports Menu Options

- **Petra** takes you to the other PETRA modules. Select the module you wish to use and this will open at the same time as the Conference Management module. You can use the equivalent menu in any other module to swap backwards and forwards between modules.
- **Help** The Help system is described in the GENERAL USER GUIDE. Help allows you to read the User Guides on screen.

1.3 Structure of Conference Management User Guide

The Guide is organised into 5 Chapters.

Chapter 1, Introduction to Conference Management provides an overview.

Chapter 2, Selecting a Conference explains how to select a conference that you wish to set up and manage.

Chapter 3, Conference Set-up explains how to set up conference charges and discounts, and conference accommodation ready to accept participants.

Chapter 4, Conference Management explains how to load participants into the conference System, and how to allocate accommodation and groups, print badges, etc.

Chapter 5, Conference Reports explains how to produce many types of conference report.

----- End of Chapter 1 -----

Chapter 2 Selecting a Conference

PETRA can be set up to manage a number of different conferences, but on any one computer terminal it is only possible to work on one conference at a time. This conference is the active conference.

2.1 Selecting a Conference to Manage

The Conference Management module is opened as follows:

1. From the *Petra Main Screen*, click `Conference Management`. This will lead you to the *Conference Management Welcome Screen* (see Figure 2-1).

Figure 2-1 Conference Management Screen showing the conference which is currently active

If you have already set up one or more conferences, then the conference that you last used will be displayed, and this conference is active. You can now work on this conference if you wish to.

2. To work with a different conference that is already on your Conference Management system, or to set up a new conference, select the File menu on the menu bar, as shown in Figure 2-2.

Figure 2-2 Upper part of Conference Management Screen showing File menu

3. To work on a different conference which you have already set up, click `Select Conference`. A list screen appears showing all the conferences that you have set up previously. Highlight the one that you want, and click `Accept`. This conference now becomes the active conference, and the name is displayed on the screen. After working on one conference, make sure that all Conference Management screens are closed before selecting a different conference.

4. If you wish to start work on a new conference, which is not yet set up in Conference Management, click `New Conference`. A list of all possible conferences appears. This list shows all conferences and campaigns that have been entered as partners in your PETRA system.
5. Highlight the conference you wish to manage and click OK. This conference is then entered into the Conference Management system and becomes the active conference.

2.2 Creating a Completely New Conference

Before you can select a conference it must exist as a partner of class 'Unit' on your PETRA system. Most conferences are set up and distributed to offices by the PETRA team. If you wish to set up a new conference or event which does not already exist, you must first enter it as a new partner of class Unit, (see the PARTNER USER GUIDE for how to create a partner, and PERSONNEL USER GUIDE for detailed instructions on creating a Campaign/Conference, including Code and Unit Type.)

2.3 Deleting an Old Conference

Warning! If you delete a conference, all the information relating to attendance at that conference will be lost. Do not do this until all necessary information has been exported into files where it can be kept for reference if necessary. If in doubt seek advice.

Deleting an old conference will remove all information about attendees and costs. It will not delete information relating to available accommodation (since this is stored with the Venue partner), but it will delete the allocation of attendees to rooms).

To delete a conference:

1. Check that all necessary reports have been run and saved, and useful information exported. Exporting Attendee details and Room Allocations is described in section 4.7 on page 35, and you may also wish to export Accommodation (see section 3.3 on page 18.)
2. On the *Conference Management Screen* (see Figure 2-2), first check the conference shown on the screen as the active one is indeed the one that you wish to delete. If not, then select the conference that you wish to delete, so that it becomes the active conference.
3. Select `File` and then `Delete Conference`. PETRA asks you to confirm that you really do wish to delete the conference. If you are sure, click Yes .

----- End of Chapter 2 -----

Chapter 3 Conference Set-up

After selecting a conference to manage on PETRA, you can set up all the basic information for the cost of attendance, the venue(s), and details of accommodation available at the venue. You can do this preparatory work before receiving details of any people who will attend the conference. This chapter includes sections as follows:

3.1 Selecting the Venue(s) for the Conference

3.1.1 Selecting Existing Venues

In PETRA 2.1 the venue for a conference is set up as a Partner of Class Venue. When setting up a conference, we select the venue(s) at which the conference will be held. If the Venue you wish to use does not yet exist as a partner on your system, you will need to create or import it (see section). To select the Venue for a conference:

1. From the menu bar on the *Conference Management Screen*, select `Conference Setup` and then `Edit Conference Master`. The *Conference Master Maintenance Screen* appears. At the bottom of the screen is a place to select the Venue. Sometimes two different venues may be used for the same conference (for example, a conference centre may have two parts, which may be considered as separate venues), so it is possible to select more than one venue. The screen shows all the venues that have been selected for the conference.

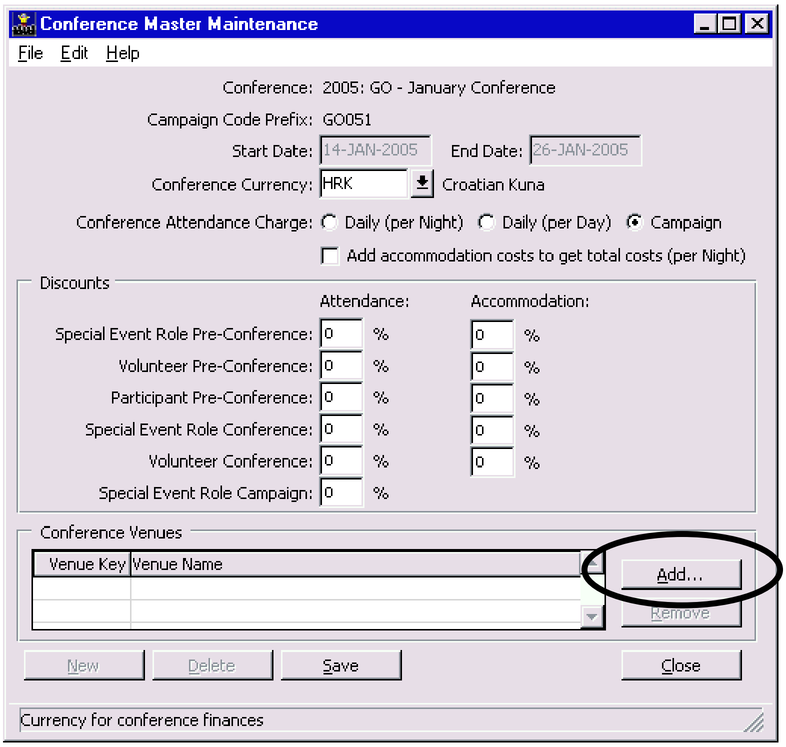


Figure 3-1 Conference Master Maintenance Screen, showing button to add a Venue.

2. To add a Venue, click Add . A *Venue Find Screen* appears, which is similar to the normal *Partner Find Screen*. Click Search. If the Venue that you want already exists on your system, select it and Click Accept. The Venue will then appear in the panel on the screen (see, for example, Figure 3-2, page 12.)

   If the Venue does not exist, click New, to create a new partner of class Venue (NB See the Tip below). A New Partner Screen appears. Follow the procedure in section 3.1.2 to create a new venue, before continuing. You will then to the *Venue Find Screen*, and the new Venue is included in the list. Select it and click Accept.

3. If required, more venues can be added. If you make a mistake and add a venue incorrectly, highlight it, and click Remove.

At this point we are just selecting a Venue. To set up accommodation, etc, see section 3.3 on page 18.

3.1.2 Creating a New Venue

Venues must be set up as partners of class Venue. The way of creating a partner is described in the PARTNER USER GUIDE, and class Venue can be selected when creating the partner. Information can be entered in the normal way on the main Partner Edit Screen. However, the Partner Detail depends on the class of partner, and so this screen will be explained here.

> **Tip - New Venues** Suppose that you are organising a conference at a particular venue. This venue does not exist on your system, but you know that it has been used before. Ask the person who used it before to export the Venue partner and send it to you. This will save entering the partner details, buildings and rooms again.

To enter Partner Details for a venue:

1. Create the partner as described in the PARTNER USER GUIDE, choosing class Venue. The *Partner Edit Screen* will appear. Enter appropriate address information, etc.

2. From the menu bar of the *Partner Edit Screen*, select `Maintain`, then `Detail`. The partner detail screen appears.

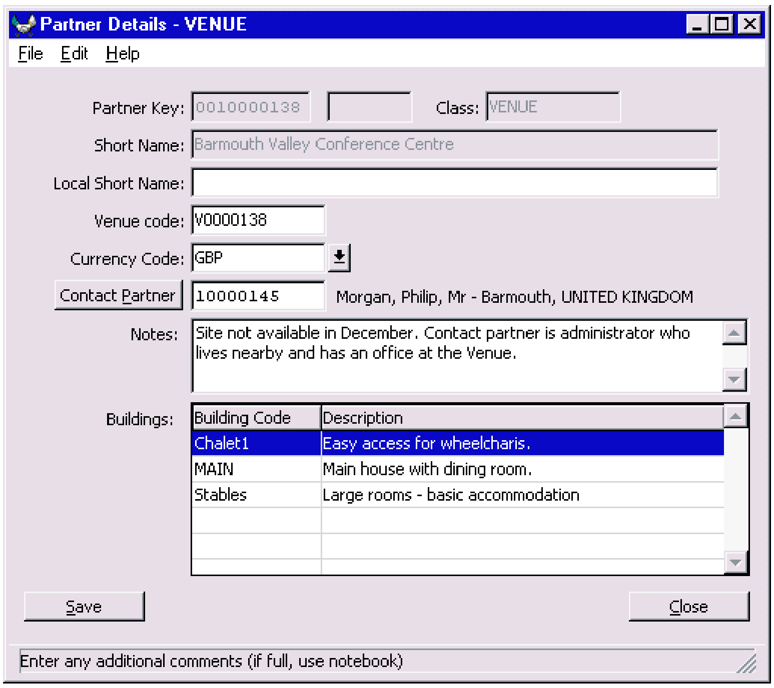


Figure 3-2 Partner Details Screen for partner class 'Venue'

3. Enter data as follows:

Venue Code This must be a unique code. By default, PETRA uses the last 7 digits of the Venue partner key.

Currency Code Enter the default currency which is normally used at this venue. However, when a conference is set up at this venue, the currency set up on the *Conference Master Edit Screen* is used for the conference (see section 3.2.1, page 13), and overrides the currency set here for the venue.

Contact Partner The person responsible for the conference site should be set up as a separate partner, class family, and selected here.

Notes Add any useful notes relevant to the Venue.

Buildings This panel is for information only. It shows the Buildings that have already been set up for this Venue. It is not possible to add or edit buildings from this Partner Detail screen; that is only possible from the Conference Management module (see section 3.3, page 18.)

4. Click Save, then Close. This Venue may now be selected for a conference.

3.2 Setting up Conference Charges

It is necessary to select the currency the conference will use, the charging basis (total, or per day), the basic costs for different categories of people, and discounts for children, etc. PETRA provides a lot of flexibility. Before setting these costs up, it may be useful to read section 3.5, page 23, which explains in detail how PETRA calculates the costs. It is then necessary to decide on the appropriate basis for charging (e.g. daily charge or fixed, accommodation included or added separately, and discounts.)

The items on the `Conference Setup` menu deal with this (see Figure 1-3, page 7). The purpose of the different items is summarised below, and explained in the following sections:

Menu Item	Function
Edit Conference Master	Select the currency to be used at the conference (e.g. EUR for Euros). Set any discounts for members, volunteers, etc. These are based on the Event Roles assigned to the attendee.
Standard Conference Costs	Enter the standard conference costs, based on the number of days of the conference and subsequent campaign, and a daily rate. There may be several standard costs, for example for 1 day, 5 days (conference alone) and 14 days (conference + campaign).
Campaign Supplements	Enter any additional supplements that must be paid by participants in special, high-cost campaigns.
Early and Late Registration	Enter discounts for early registration or additional costs for late registration. These can be entered either as fixed amounts (e.g. £8), or a percentage (e.g. 5%) The dates for which these apply are also entered.
Child Discounts	Enter the discounts applying to children under a certain age. More than one age-range can be specified (e.g. 100% for up to 2 years; 50% for up to 12 years).

3.2.1 Conference Currency and Participant Type (Event Role) Discounts

The *Conference Master Maintenance Screen* is used to set the currency to be used for the conference/campaign, the basis for charging (e.g. per day or fixed rate) and any discounts relating to the event role of normal adult attendees. See later sections for child (age-related) discounts and early registration discounts. If required, discounts can be negative – that is effectively a supplement or additional charge!

1. From the *Conference Management Screen*, select `Conference Setup` and then `Edit Conference Master`. The *Conference Master Maintenance Screen* appears:

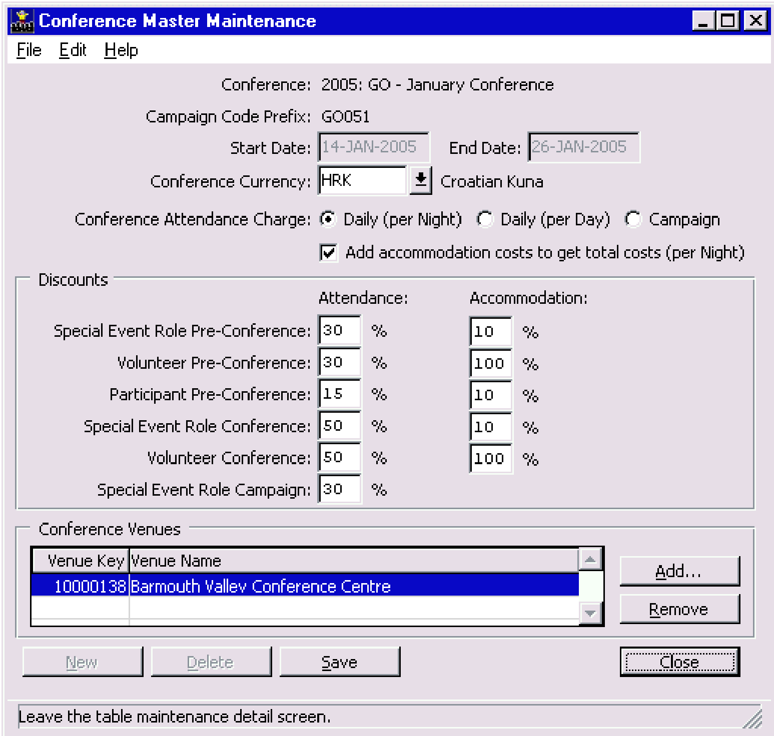


Figure 3-3 Conference Master Maintenance Screen

5. Enter the following items for the conference:

Conference Currency From the drop down menu select the currency that the conference will use for all costings for the conference/campaign. This will override the currency set for the venues.

Conference Attendance Charge Select the option required for charging to attend the conference and participate in the campaign. **Daily (per night)** means that costs will be charged for each night that the attendee is present. **Daily (per Day)** means that the charges will be incurred for each day that the person is present, including the arrival and departure days. **Campaign** means that a total fixed cost will be charged depending upon the campaign that the attendee is going on to join. The daily and campaign charges that will be used are those set up under standard costs (see section 3.2.2, page 15.)

Add Accommodation Costs to get Total Costs Normally the standard cost of attending a conference includes accommodation. However, room charges may vary a lot, and it may be useful to use standard costs only for attendance at the conference and to add separate accommodation costs, as set up for Rooms (see section 3.3.2, page 20.) If this box is checked, room costs are added to the standard costs. If it is not checked, they are ignored. Accommodation costs can only be added for the **Daily** options, not for **Campaign**.

Discounts (Event Role) Enter the percentage (%) discount that is offered for different types of attendee and for different periods of the event. **Pre-conference** refers to extra days that the attendee may be present before the conference starts. **Event Role** refers to the roles at the conference and campaign as entered in the application. **Participant** refers to an attendee who is a ‘normal’ applicant, that is, not a **Volunteer** or anyone with another **Event Role**, such as speaker, etc. The Event Role Table in the Personnel Module shows which of these roles results in a discount, and allows you to modify this (see PERSONNEL USER GUIDE.)

Accommodation discounts are only enabled if the **Add Accommodation Costs** check box has been ticked. See later sections 3.2.4, page 16 and 3.2.5, page18 for early registration and child discounts, respectively.

6. Click [Save], then [Close].

3.2.2 *Standard Conference Costs*

Standard conference costs are the 'normal' costs for an attendee for whom there are no discounts or supplements. Standard costs may be charged on a daily basis or for a complete programme (either the whole conference, or the conference plus a following campaign.) Separate costs are entered are as in the table below. They are all entered in the same list, for different numbers of days.

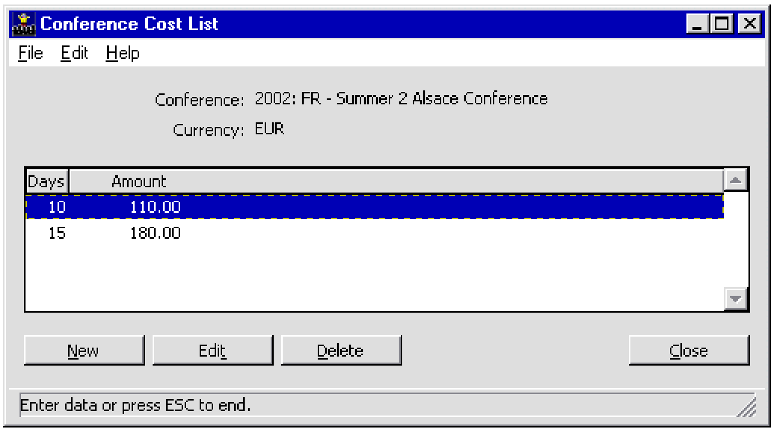
> **Note** The number of days for the conference and campaign period costs must be the same as that included in the Campaign Code (the final two digits, as described in the PERSONNEL USER GUIDE). PETRA uses the code to decide which rate to charge.

Period	Use
Daily Cost (1 day)	A rate must always be entered for a period of '1 day'. Even if the conference is being charged as a programme (campaign), the daily rate will be used for any extra pre-conference days.
Conference Period Cost	Unless you are using a daily rate throughout, a rate must be entered for the number of days of the conference, e.g. a rate for 5 days, for a conference from Monday to Saturday.
'Conference + Campaign' Period Costs	Campaign costs are set for the total number of days (conference + campaign). If the conference is followed by campaigns of different lengths, then separate costs must be set for each 'Conference + Campaign' period.

To set up the standard costs:

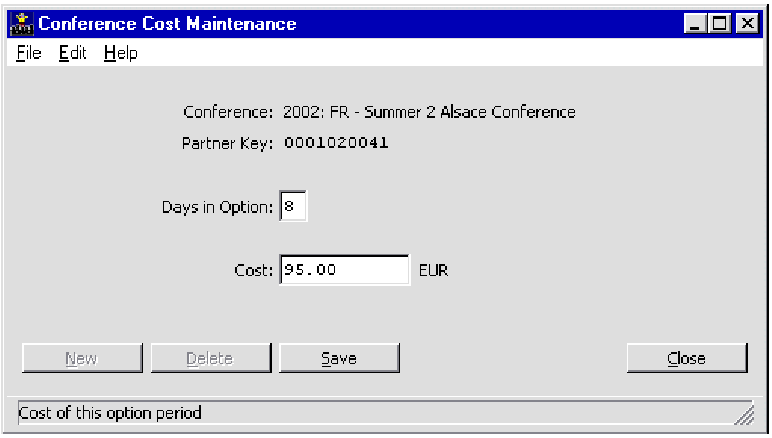
1. From the *Conference Management Screen*, select `Conference Setup` and then `Costs`. The *Conference Cost List Screen* appears, showing the different options (in days) and the costs:

Figure 3-4 Conference Cost List Screen



2. To set up a new cost, click New; to edit an existing cost, highlight it and click Edit. The *Conference Cost Screen* appears.

Figure 3-5 Conference Cost Maintenance Screen



3. Enter the number of days and cost. You must enter a cost for 1 day. You will normally also make additional entries for other periods representing the total ‘conference + campaign’ period, for each campaign option.
4. Click Save, then Close (or New to enter another cost). Click Close again.

3.2.3 Campaign Supplements

The standard costs for (conference + campaign) depend on the total number of days, as described earlier. However, sometimes there may be two or more campaigns of the same duration, one of which requires an extra charge (for example because it involves more travel). This is known as a **campaign supplement**. The supplement can be set for a campaign, which is identified by the campaign code (see section 3.2.2, page 15.) Campaign supplements are fixed amounts and are not reduced by other discounts (such as campaign role or child.)

1. From the *Conference Management Screen*, select `Conference Setup` and then `Campaign Supplements`. The *Supplement List Screen* appears:
2. Click New to enter a new supplement. To edit an existing entry, select it and click Edit. The *Supplement Maintenance Screen* appears.

Figure 3-6 Campaign Supplement Maintenance Screen

3. Enter details of the supplement.

   Campaign Type Use the drop-down box to select the campaign for which this supplement applies, (or enter the six-character code that shows the type of campaign - characters 6 to 11 of the 13-character campaign code. See Campaign Codes in the PERSONNEL USER GUIDE for a fuller explanation.) You can also check the code by using the Partner module. Use the *Partner Find Screen* to find the campaign, click Edit to see the *Partner Edit Screen*, and then go to `Maintain` (on the menu bar), then `Detail.` The campaign type may be obtained from the field labelled `Campaign Code` (see Figure 3-7, below).

   Supplement Enter the supplement in the currency of the conference.

4. Click Save, then Close (or New to enter additional supplements.) Click Close.

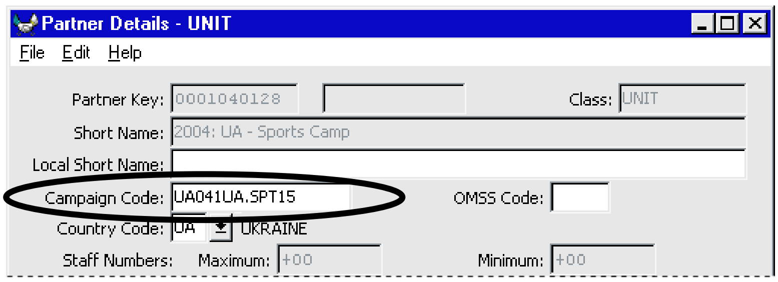


Figure 3-7 Upper part of Partner Detail Screen for Unit, showing Campaign Code

3.2.4 Early and Late Registration

It is possible to provide a reduction (discount) for people who register early for the conference, and to charge an extra supplement for those who register late. It is possible to provide both (or even several of each type, corresponding to different dates of registration!) These only affect the Standard Conference Costs, not pre-conference costs, accommodation costs (if applied separately) or campaign costs.

> **Important - Load data on key dates** The registration date used is the date that the attendee was loaded into the conference system, not the date that the application was received by the conference registrar. Early registration discounts apply to all applications loaded on or before the date specified, and so the registrar must do a load/refresh operation ON the critical dates, since otherwise people entitled to a discount may not receive one. Late registration supplements apply to all applications loaded on or after the date given, so a load/refresh operation must be done late on the day BEFORE the critical date, since otherwise people may be charged a supplement even though their application had been received before the critical date. If necessary, registration dates can be edited manually.

1. From the *Conference Management Screen*, select `Conference Setup` and then `Early and Late Registration`. The *Early or Late List Screen* appears. This lists the early or late discounts or supplements that have already been set up.
2. To edit an existing discount, select it and click `Edit`. To set up a new one, click `New`. The *Early or Late Registration Maintenance Screen* appears.

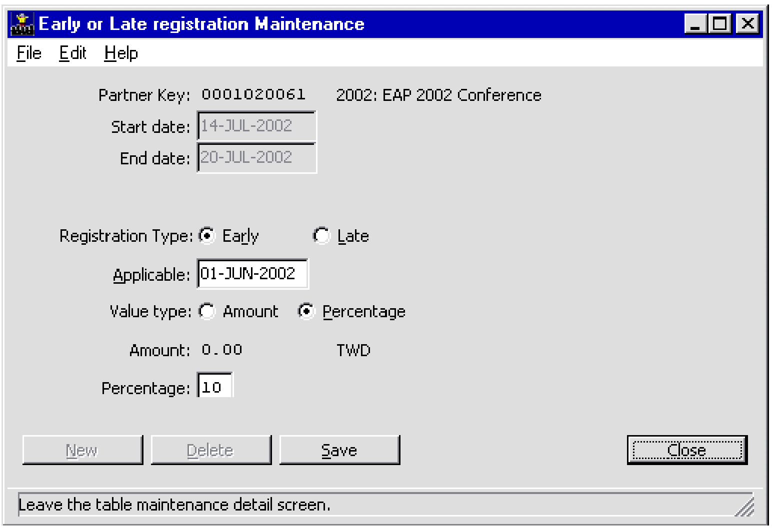


Figure 3-8 Early or Late Registration Maintenance Screen

Enter the required data as follows:

Registration Type Enter `Early` or `Late`.

Applicable Enter the registration date for which you wish this discount or supplement to apply. It will apply to applications loaded into the conference management system on that date, as well as dates before (for early discounts) and dates after (for late supplements).

Value Type Select Amount of Percent, depending upon whether you wish the value to be a fixed amount (e.g. 20 Taiwanese dollars) or a percentage (10% shown in example).

Amount or **Percentage** Only one of these boxes will be shown, depending upon which option you have chose for Value Type. Enter the figure you require.

3. Click Save, then Close (or New to enter additional records.) Click Close.

3.2.5 Child Discounts

Reductions may be provided for children under a certain age. If you wish, several different discounts can be entered for different age ranges. A Child Discount can be set to apply to either Conference or Accommodation. The **Conference** setting applies a discount to standard conference costs, pre-conference costs and Campaign costs (but not Campaign Supplements). However, if you have set the system so that accommodation costs are calculated separately, and you wish to apply a Child Discount to the accommodation as well, then you need to set a second, separate Child Discount for **Accommodation**. (See section 3.5, page 23, for a detailed explanation.) To set up a Child Discount:

1. From the *Conference Management Screen*, select `Conference Setup` and then `Child Discounts`. The *Child Discount List Screen* appears.

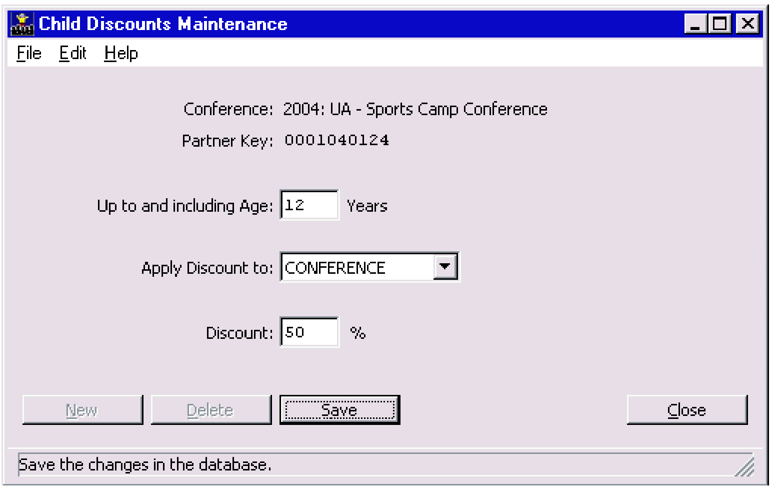


Figure 3-9 Early or Late Registration Maintenance Screen

2. Enter data as follows:

   Up to and including Age Enter the age that the discount will apply to.

   Apply Discount to Select Conference to apply to conference, pre-conference and campaign costs. If accommodation is being charged and added separately, you can set up a second discount, for which you select Accommodation.

   Discount Enter the percentage discount to be given.

3. Click Save. To enter another Child Discount, Click New, otherwise Close.

3.3 Setting-up Conference Accommodation

Each conference site is a partner of class Venue, which can exist in PETRA even if no conferences are set up to use it. When you set up a conference on PETRA, the first thing is to select a Venue (see section 3.1, page 11). It is possible to select and use more than one venue for a conference. Buildings and Rooms are set up for a Venue, showing the number of beds available, etc. Since this information is stored with the venue details, it is available for all conferences using that venue.

Warning - editing accommodation When you set up or edit buildings and rooms for a venue, you are altering the permanent record of accommodation at that venue on your PETRA installation. This will affect all conferences at that venue, past, present and future, and all users. If you want to make temporary changes to accommodation, you can export the existing accommodation, so that you can later re-import it.

There are three main functions for setting up accommodation available at a venue, and these are described in the following sub-sections.

- Entering details of buildings available for accommodation. (See section 3.3.1, page 19.)

- Entering details of the rooms in each building, including the number of beds in each room, and whether they are for male or female or family use. (Section 3.3.2, page 20.)
- Exporting and importing building and room details. (Section 3.3.3, page 21.)

3.3.1 Setting up Buildings

Before applicants can be allocated a room at a venue, it is necessary to set up first the buildings, and then the rooms within each building, saying how many beds are available in each room, and whether the room is male or female (or suitable for families).

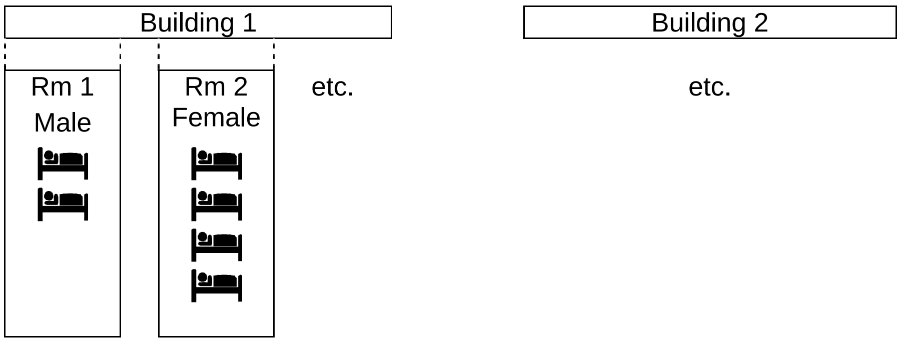


Figure 3-10 Setting up buildings and rooms at a venue

> **Tip** Before entering building and room information, decide on a system of **Building** and **Room Codes**. It is not possible to alter these codes after entering them except by deleting and reentering the building or room.

1. From the menu bar of the *Conference Management Screen*, select `Maintain Tables` and then `Buildings`. The *Buildings List Screen* appears.

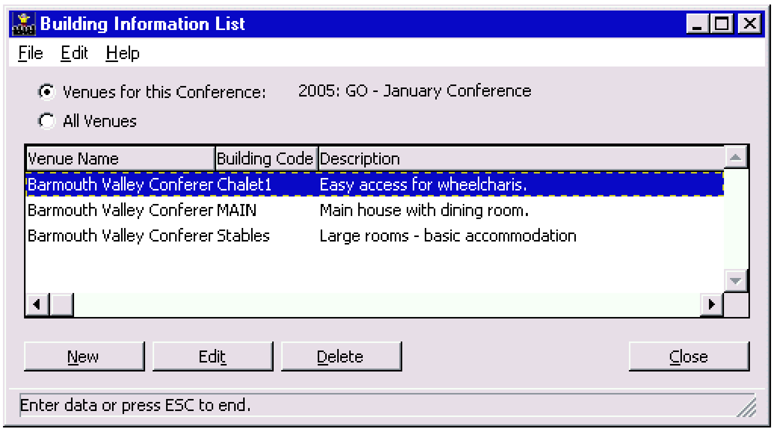


Figure 3-11 Buildings List Screen

2. Use the radio buttons at the top to display either all Venues, or just the venues that will be used at the active conference. To edit an existing building, highlight it and click Edit. To enter a new building, click New. If you have selected to show more than one venue, you well see a list of venues. Select the one to which you wish to add a building and click `OK`. The *Building Maintenance Screen* appears.

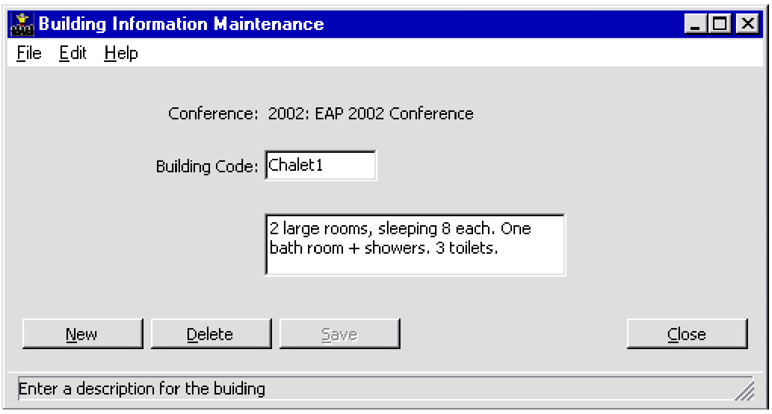


Figure 3-12 Building Maintenance Screen

3. Enter the new building code and description, click Save and Close.
4. Click Save, then Close (or New to enter additional buildings.) Click Close again.

Warning - Deleting Buildings It is possible to delete a building. The Buildings screens have Delete buttons, which can be used for this. However, if you do this, all rooms in the building will of course be deleted, and any room allocations made to these rooms will be lost.

3.3.2 Setting up Rooms

Buildings must be set up before it is possible to set-up rooms within those buildings.

1. From the menu bar of the *Conference Management Screen*, select `Conference Setup`, then `Rooms`. The *Rooms List Screen* appears, showing all rooms which have so far been set up in all buildings.

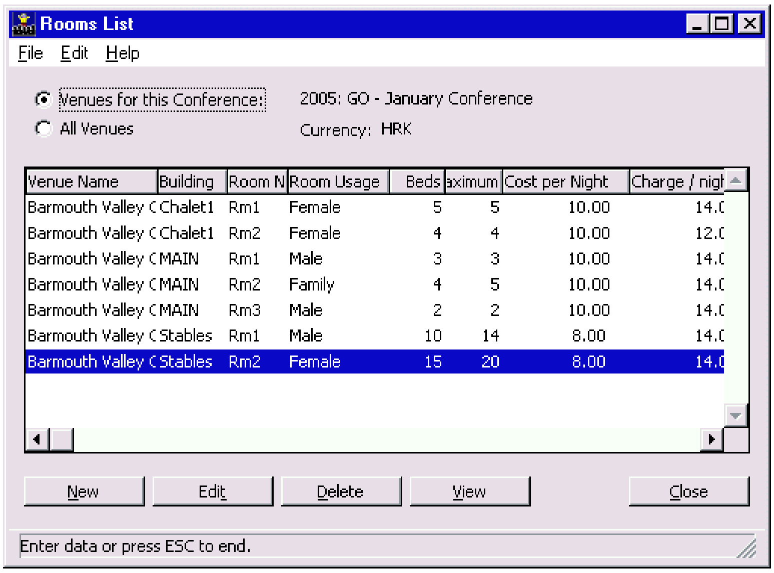


Figure 3-13 Rooms List Screen

2. At the top of the screen select the rooms to be viewed. Normally this will be Venues for the Conference that is active and named on the screen. However, from this screen it is possible to edit and set up rooms in all Venues which exist on your PETRA installation.
3. To enter a new room, click New, (if PETRA asks you to select the Venue, do so from the list and click OK.). To edit an existing room entry, click Edit. The *Room Maintenance Screen* appears.

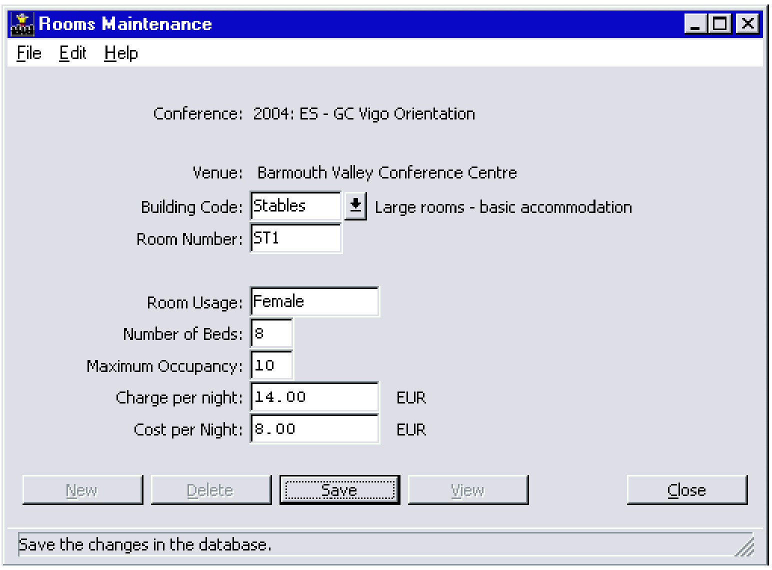


Figure 3-14 Room Maintenance Screen

Enter the required room data.

Building Code Use the drop down menu to select the building in which to set up a room.

Room Number Enter the room number or name for a room in that building. Be careful to enter this exactly as you want it; it will not be possible to alter this later without deleting the room and re-entering it.

Room Usage Enter the proposed usage, e.g. Male, Female, Family, etc. This is a label to help you with planning, but you can change it later. When you assign people to rooms, PETRA does not actually use this information, although after a room has been allocated to one person, PETRA will not allow members of the opposite sex to be allocated the same room unless they are linked as Family Members. (See section 4.4.1, page 31.)

Number of Beds and **Maximum occupancy** These will normally be the same, but may differ if there is a double bed in the room, or if temporary beds can be provided.

Charge per night Enter the amount that will be charged to each occupant of the room. This information is only used by PETRA if the conference has been set up to add accommodation charges separately (see Figure 3-3, page 14.)

Cost per night Enter the amount (per person per night) that the organisers will be charged for a bed in the room. This figure is important, since it may be used in calculating the cost to be paid to the owners of the conference site, based on the number of 'bed-nights'.

4. Click Save, then Close (or New to set up another room). Click Close again.

> **Warning - Deleting Rooms** It is possible to delete a room. The screens have a Delete button, which can be used for this. However, if you do this, any room allocations made to that room there will be lost.

3.3.3 Saving and Re-using Accommodation Data

The introduction of Venues in PETRA 2.1, means that accommodation (rooms and buildings) is not linked to a specific conference; it is saved with details of the Venue. There is therefore not the same need to save accommodation data as there was before. However, there may be occasions where you might wish to do this - for example if you want to modify the data for a particular purpose, such as only using part of a site, or allocating the rooms differently.

PETRA allows you to save the original accommodation details in a file. This file can be imported again into the conference manager system to reuse it. Actually PETRA exports and imports the Venue class partner (or partners if more than one Venue is selected), so the operation is basically a partner export or import.

To export accommodation data:

1. Open the *Building List Screen* as described in section 3.3.1. If exporting accommodation, use the radio button at the top of the screen to select all venues, or just those venues used for the active conference.
2. On the menu bar click File.

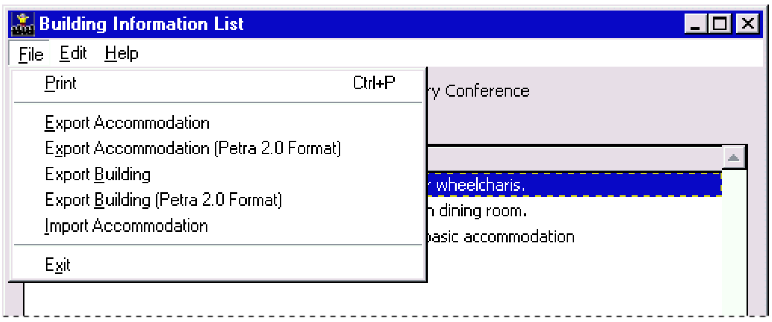


Figure 3-15 Building Information List showing File menu

3. To export all Accommodation, select `Export Accommodation`. To export just one building, highlight it and click `Export Building`. To import accommodation, select `Import Accommodation`.
4. If you have selected more than one venue, a *Select Venue Screen* will appear so that you can select the Venue(s) to be exported. Highlight the venues and click OK.
5. A File Directory Browse screen appears. If exporting, select a location to store the file, give it a name (normally ending .txt) and click OK.

   If importing, find the previously stored file and click OK. The data is then imported to your current Conference Management System. When you import accommodation, you are actually importing the Venue partner. The imported data will overwrite the existing data for buildings and rooms if the names are the same. If new buildings or rooms have been created on the system into which accommodation is being imported, they will remain, in addition to the imported data.

It is also possible to export complete venues from the `File` menu on the main *Conference Management Screen*.

3.4 Setting up Extra Cost Types

Sometimes it is necessary to charge an attendee for extra non-standard costs (for example international telephone calls or the provision of bed sheets if they forgot to bring them). It possible to set up the different types of cost in a table. These types (categories of additional cost) are used when a cost is assigned to an attendee (see section 4.7, page35). To set up a new conference cost:

1. From the menu bar of the *Conference Management Screen*, select `Maintain Tables`, then `Cost Types`. The *Conference Cost Type List Screen* appears.

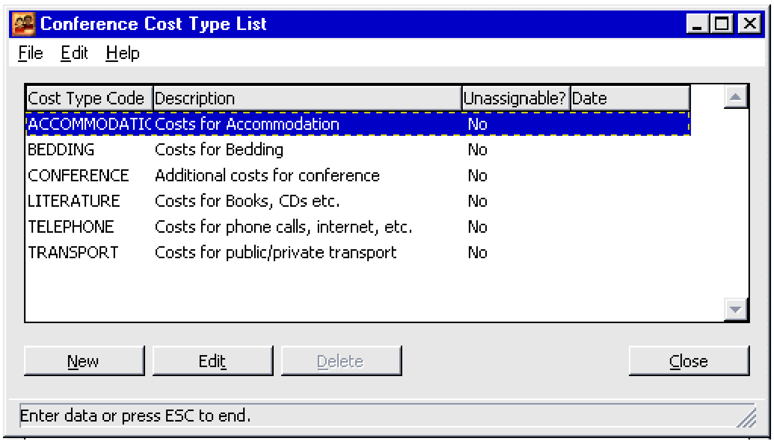


Figure 3-16 Conference Cost Type List Screen, showing cost types already set up

2. To edit a description, highlight the item and click Edit. To add a new cost type, click New. The *Conference Cost Type Maintenance Screen* appears.

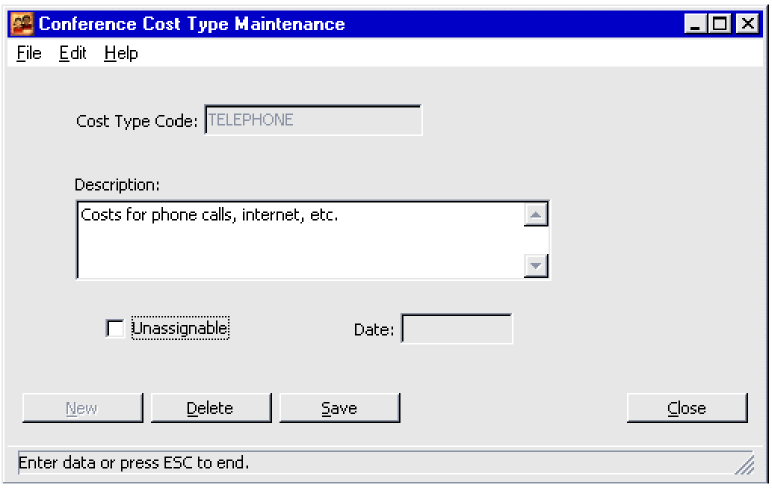


Figure 3-17 Conference Cost Type Maintenance Screen

3. Enter data as appropriate.

   Cost Type Code Enter an appropriate code.

   Description Enter a description for this code.

   Unassignable Check this box, if you no longer wish this cost type to be used.

4. Click Save, then New to enter another cost type, or Close to exit.

To delete a cost type, the Delete button may be used. Accommodation and Conference cannot be deleted, and nor can other cost types if they have already been used.

3.5 Explanation of Conference Charges

The conference charges calculated by PETRA cover a range of different situations. First, the charges cover three periods: the main **conference**, a possible **campaign** following the conference, and extra (**pre-conference**) days for attendees who come to the conference site early for any reason. In addition, there may be different charges for each of these depending on the circumstances. For example, for ‘normal’ attendees, there is a **standard cost**; for some people there may be a **discount**; and in other cases there may be an extra charge payable (a **supplement**). This section explains how these different factors combine to give the final charge.

Standard Costs

For a simple conference (no campaign), standard costs may be charged either on a daily basis or as a fixed total amount for the whole conference. Whichever method is chosen, it applies to all attendees. When a conference is followed by a campaign, the fixed rate option must be used. The daily basis may use either the number of days (including arrival and departure days) or the number of nights.

Campaign costs include the preceding conference so the charge covers both. One conference may be followed by several possible campaigns. Since it costs more to attend a 21-day campaign that a 7-day one, it is possible to set up several different standard fixed costs, corresponding to different total periods of “conference + campaign”. So, for a 5 -day conference followed by a 7-day campaign, a 12-day cost must be entered.

Pre-conference days are always calculated on a daily basis. So, if someone spends several days at the conference site before the conference begins, and then attends the conference and a following campaign, the cost will be made up of:

(number of pre-conference days * daily rate) + (fixed rate for conference and campaign)

These options are illustrated in the examples below.

	Pre-conf	conference	campaigns	
a		9 9 9 9 9		conf. alone - charged at daily rate ($9) or
b		5-day conf. ($45)		5-day conference alone - fixed rate
c		10 days ($145)		conf. + 5-day campaign - fixed rate
d		14 days ($160)		conf. + 9-day campaign - fixed rate
e	9 9	14 days ($160)		conf. + 9-day camp. + 2 pre-conf days (combination of fixed and daily rates)

Each rate is entered under Conference Costs as a cost for a period of days. For the above example, it is necessary to select fixed rates (option (a), daily rate, is not possible because campaigns follow). It is necessary to enter fixed rates costs for: 1 day, 5 days, 10 days and 14 days. The 5-day rate is used for anyone attending the conference alone, and the 10-day and 14-day rates are used for participants in the two campaigns shown. The notional 1-day conference rate is necessary, even though the conference is charged on a fixed basis, since it is the basis for charging for pre-conference days. Since the last two characters of the Campaign Code are the total number of days for that option, PETRA knows which rate to charge for each attendee, based on the campaign that they are attending.

In some cases someone may attend a campaign, but not the conference beforehand. This is shown by the box **Campaign Only** in the application. In this case the charge is calculated by subtracting the conference cost from the combined cost (conference + campaign).

pre-conf	conference	campaigns	
		14 days - 5 days ($115)	Campaign alone (9 days)

Discounts

Discounts may be applied in three stages.

Discounts for Type of Attendance These discounts may be set up in the *Conference Master Screen* for three different situations: (1) those with certain special Event Roles (see note below table); (2) volunteers who come to assist with practical work; and (3) for pre-conference days which may be charged at a lower rate than main conference days for all people. These discounts must be 'percentages', not fixed amounts. More than one may apply to one individual, so a total of 6 attendance type discount rates can be set up:

Pre-conference	Conference	Campaign
☺ Event role Pre-conf. discount ☺ Volunteer Pre-conf. discount ☺ Participant Pre-conf. discount	☺ Event role Pre-conf. discount ☺ Volunteer conf discount	☺ Event role Pre-conf. discount

[Currently these discounts can only be specified as a percentage reduction from the standard cost for that item. Reductions of fixed amounts may be added later.]

Note - Event roles Event roles are selected on a person's application, both for the conference, and for the campaign if appropriate. However, only certain roles result in a discount. To see which roles these are, or to change the settings, view the Event Role Table in the Personnel Module, and look at the Discount field (`Maintain Tables` >`Application Tables` > `Event Role`).

Early Registration Discounts Additional discounts may be applied for people who register before a certain date. It is possible to set up several discounts, for example 10% reduction for those who register before 1 May, and 5% for those registering before 1 June. The date of registration is the date that these are loaded into the conference system. So, it is important that the conference organiser loads all applications in hand on the key dates (on the date specified for early discounts, and late on the day before the date specified for late supplements) since otherwise people will be considered not to have registered by then, and so will be overcharged. These discounts may be percentages or fixed amounts.

Age (Child) Discounts Attendees under a certain age can be given a percentage discount. any number of different discounts can be applied for different ages, e.g. 75% for up to age 1, and 50% for up to age 12. Although normally used for children, it can also be applied to senior citizens (by, for example giving zero discount up to age 65 and 50% discount up to age 99.)

Supplements

Late Registration Supplements These are the opposite of early registration discounts (above), and result in an extra charge for people registering after a certain date. They may be a fixed amount or a percentage.

Campaign Supplements Certain campaigns may require additional costs for travel or special equipment, and so may need to charge more than other campaigns of the same period. Campaign supplements are always fixed amounts, and are not reduced for people who have a discount on the standard campaign costs.

Total Calculation

The following table shows how the various discounts may be combined to give sub-totals. The discount factors are shown in shaded boxes ▢.

PRE-CONFERENCE PERIOD

Pre-conf days	x	Standard cost 1 day	x	Event Role Pre-Conf Disc ATTD	x	Child Disc CONF			= PC	Includes Accom unless Accom is to be added separately
									+	
Pre-conf days	x	Room cost 1 day	x	Event Role Pre-Conf Disc ACCM	x	Child Disc ACCOM			= PCA	Only applies if Accomm is added separately

CONFERENCE PERIOD

Conf days	x	Standard cost 1 day	x	Event Role Conf Disc ATTD	x	Child Disc CONF	x	Early/Late Disc/Supp	= CF_{daily}	Daily charge is not possible if campaign included. Early/late can be added
									+	
Conf days	x	Room cost 1 night	x	Event Role Conf Disc ACCM	x	Child Disc ACCOM			= CFA_{daily}	Only for Daily charging and if Accomm is added
									or	
		Standard cost Conf days	x	Event Role Conf Disc ATTEND	x	Child Disc CONF	x	Early/Late Disc/Supp	= CF_{fixed}	Normal fixed charge for conf. Includes Accom .Early/late can be added..

CAMPAIGN PERIOD

Stand. Cost (Tot cost) – (Conf Cost)	x	Event Role Disc Campaign	= CM	Normal fixed charge for Campaign
			+	
Campaign Suppl't			= CS	

Total Charge = [PC +PCA] + [(CF_{daily} + CFA_{daily}) or CF_{fixed}] + CM + CS

Example of Calculation

When the final calculation is carried out, the figures are combined in the following way.

If different discounts apply to conference and campaign, the combined standard charge is split into separate conference and campaign parts (Conf cost = Total cost - Campaign cost).

If two percentage discounts apply to the same item, they are multiplied.

Example:	Conference cost	$54
	Standard Campaign Cost	$144 (including conference) = $90 + $54
	Event Role conference discount	50% (Event Role discount for conference period)
	Event Role campaign discount	30% (Event Role discount for campaign period)
	Early booking discount	25%
	Campaign supplement	$50

Total charge =	(54 * 50% * 75%)	(conf cost * ev. role discount factor * early booking disc. factor)
	+ (90 * 70%)	(campaign cost * ev. role campaign discount factor)
	+ 50	(campaign supplement - not discounted)
=	$133.25	

----- End of Chapter 3 -----

Chapter 4 Conference Management

Most of the facilities for managing a particular conference are accessed from the `Conference Management Menu` on the menu bar of the *Conference Management Welcome Screen*, as shown in Figure 4-1.

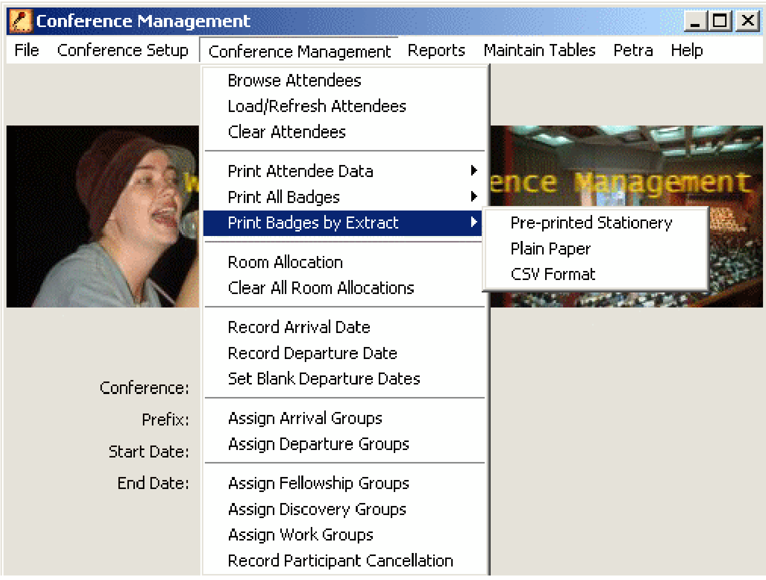


Figure 4-1 Conference Management Menu

These are described in the following sections. Related functions are explained together, so the order is a little different to that in the menu.

4.1 Loading / Clearing Conference Attendees

In order to use the Conference Management sub-system for a specific conference, the attendees must first be loaded into the conference management system. Several items on the Conference Management menu (see Figure 4-1) relate to this.

> **Note** When a set of applications are imported into the local PETRA system, the new or updated applications will not appear in the Conference Management system until they are loaded.

Load/Refresh Attendees

This command loads all partners on the local PETRA system, who are entered as attending this conference, into the Conference Management System. It needs to be used every time that a new batch of applications is received and imported into PETRA, since the applications need to be specifically loaded into the Conference Management system. The date of loading the application is recorded as the date of registration, and so affects calculation of early/late registration discounts, etc.(see section 3.2.4, page 17).

Clear Attendees

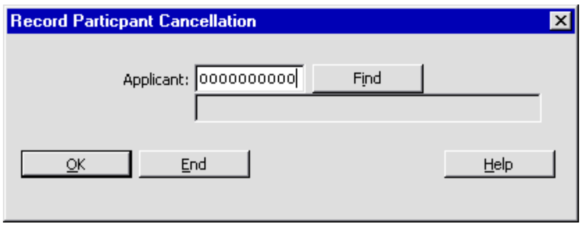
This command is the opposite of loading attendees. All attendees are deleted from the Conference Management System. However, their applications are not deleted, and remain on the PETRA system, so when you next load/refresh attendees for this conference, they will be back again. On clearing, all allocations to rooms, groups etc, will of course also be deleted.

Record Participant Cancellation

This command allows you to record that a participant has cancelled. The person's application is not deleted, but the status is set to 'Cancelled'. The screen is designed so that it is easy to record this for a number of partners. To record that a participant has cancelled:

1. From the `Conference Management` menu, select `Record Participant Cancellation`. A simple screen appears:

Figure 4-2 Record Participant Cancellation Screen



2. Click Find. A Find Screen appears. Click Search to browse all participants at this conference, or use the Find facilities for a faster search. Highlight the partner and click Accept.

Tip Instead of the Find button, you can type in the partner key and then press the <Tab> key; the Partner's name will appear. This may be quicker if you have a number of partners to enter.

3. The partner's name will then be listed in the Cancellation Screen (Figure 4-2).
4. If you realise that you have made a mistake, and do not wish to cancel, then click End. If you are sure that you wish to set the status of this application to 'Cancelled', click OK.
5. You can then find another partner and cancel their participation. When you have done this for all required participants, click End.
6. **Note** Although the participants' status has now been set to Cancelled, the names will remain on the conference attendee browse list until the next time the Load/refresh command is used.

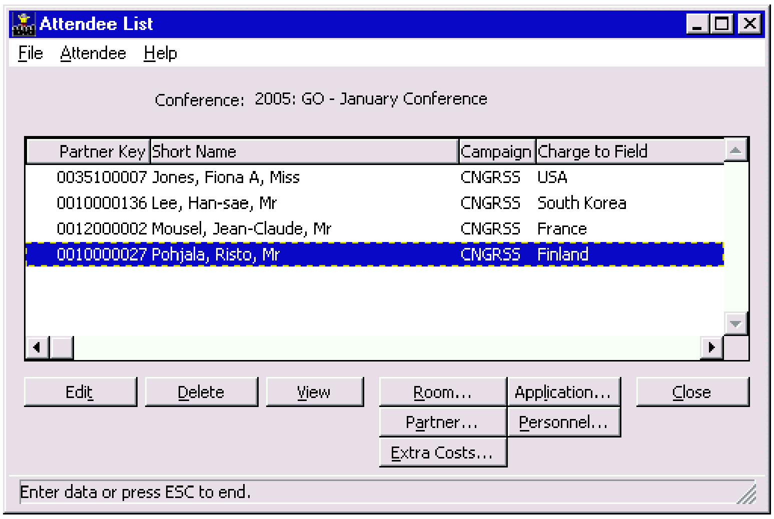
4.2 Browsing / Maintaining Conference Attendees

4.2.1 Finding a Conference Attendee

Before entering data on an attendee, it is necessary to select them. To browse a list of conference attendees:

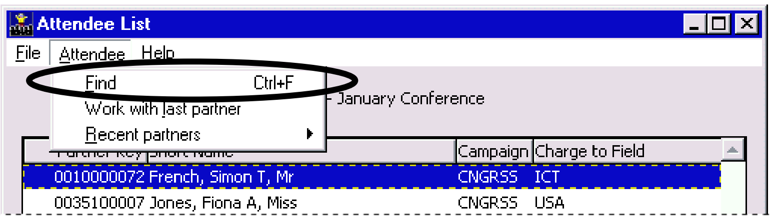
1. From the menu bar of the *Conference Management Screen*, select `Conference Management` and then `Browse Attendees`. The *Attendee List Screen* appears. Select the partner you wish to use or maintain.

Figure 4-3 Conference Attendee List Screen



2. To help you find a partner in a long list, click `Attendee` on the menu bar, then `Find`.

Figure 4-4 Attendee List Screen showing Find facility



3. Use the resulting Find screen to locate the partner, and click Accept.
4. The *Attendee List Screen* provides many short-cuts to other facilities. Click the appropriate button as follows.

Edit	Opens the *Attendee Maintenance Screen*, showing details of groups, travel, etc. This is described in the rest of this section below.
Delete	Deletes the selected attendee from the conference management system. However, the application details remain, and so will be reloaded next time a Load/Refresh operation is done, unless the application status is changed.
View	Brings up a summary of details for the attendee selected.
Rooms	Opens the *Room Allocation List Screen* (see Figure 4-8.)
Application	Opens the attendee's application screen showing this application
Partner	Opens the *Partner Edit Screen* for that attendee
Personnel	Opens the attendee's *Individual Data Screen* in the Personnel module
Extra Costs	Opens the attendee's *Extra Costs Screen* to add additional costs incurred
Close	Closes the screen

In addition, the Attendee option on the menu bar provides options to print items for the highlighted partner (print **badge**, **card**, or **extra costs report**)

4.2.2 Maintaining an Attendee

1. To maintain conference details for an attendee open the attendee list screen, and highlight the attendee, as shown in Figure 4-3, page 29. Click the Edit button. The *Attendee Maintenance Screen* for that attendee appears.

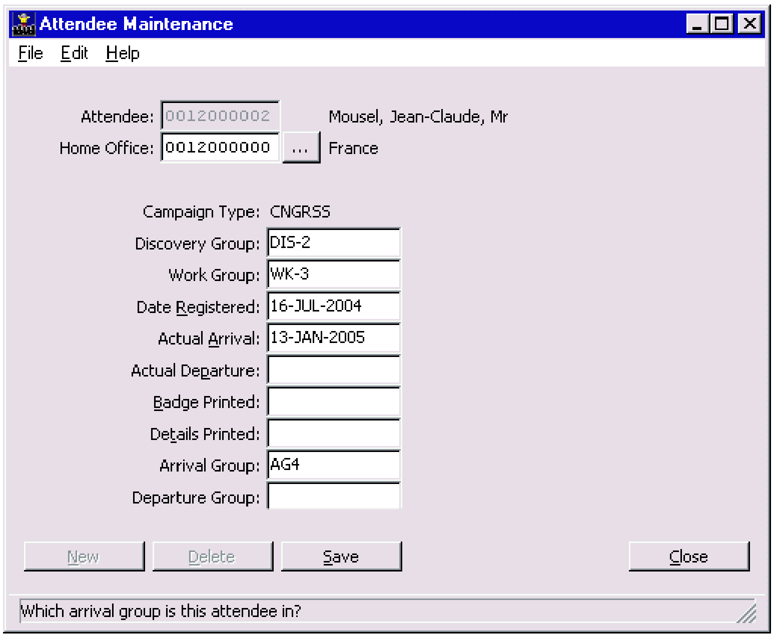


Figure 4-5 Attendee Maintenance Screen

This screen allows you to enter or edit certain details for the participant. Some fields will be filled in automatically by PETRA at the appropriate time.

If you wish to enter one item (e.g. Discovery Groups) for a group of partners, it will be quicker to use the dedicated menus described later (see the cross-references beside the appropriate data items below.)

Enter or change data for this attendee.

Discovery Groups Enter the code for the discovery group that this attendee will be in.(See alternative menu in section 4.4.3).

Work Group Enter the code for the work group that this attendee will be in. (See alternative menu in section 4.4.3).

Date Registered This will show the date that this attendee was loaded into the conference system.

Actual Arrival This is the date that the attendee actually arrived and 'signed in' at the reception desk. (See alternative menu in section 4.6, page 34.)

Actual Departure This is the date that the attendee actually departed and 'signed out' at the reception desk. (See alternative menu in section 4.6, page 34.)

Badge Printed This shows the date that the badge for this attendee was printed. PETRA will enter this automatically when the badge is printed.

Details Printed This shows the date at which other details were printed (entered automatically.)

Arrival Group This reference can be used to identify a number of people arriving on the same bus or train.

Departure Group This reference can be used to identify a number of people departing on the same bus or train.

2. Click Save, then Close to return to the *Conference Management Screen*.

4.3 Printing Conference Badges

As shown in Figure 4-1, three menu items allow you to print badges. For each there is a sub-menu offering the options of printing onto blank labels, pre-printed labels, or to a file (CSV is 'comma separated variable' and is a text file in which each item of data is separated by a comma (,). These files can be easily imported into a word-processor or spread-sheet.)

- **Print All Cards** Prints relevant data onto cards for use by the fields/teams where the attendee will be working.
- **Print All Badges** Prints badges for all attendees. Also with the badge is printed a card with other information such as accommodation, to be retained by the campaign team leader.
- **Print Badges by Extract** Allows you to select an extract of attendees, and to print badges just for that extract.

(If special forms are to be used for badges, then it may be necessary to set these up and to associate the forms with the Conference Management Module, as described in the SYSTEM MANAGER GUIDE.)

4.4 Room Allocations

Before attendees are allocated to rooms, it is important that all buildings and rooms have been entered and designated male/female, etc. This is described in section 3.3, page 18. At any time reports on the room allocation can be printed out, as described in section 5.2, page 42.

It is possible for an attendee to have more than one room allocation, covering different periods, although this is not desirable. For example they might be allocated to Room 27 for a pre-conference session, and have to move to Room 31 for the main conference. In this case they will have two allocations, covering different time periods.

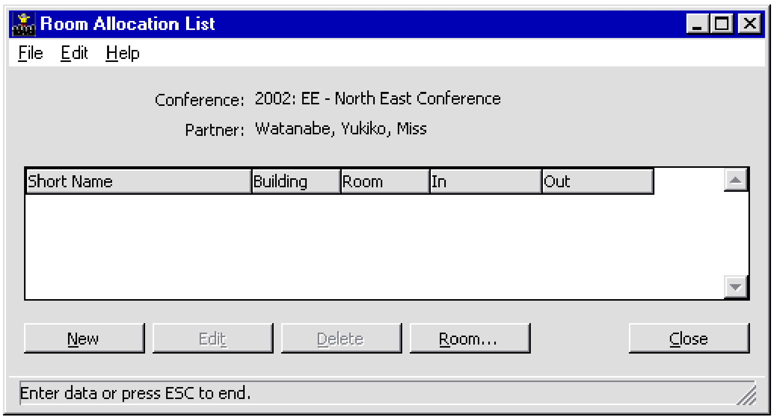
Section 4.4.1 describes how to allocate a room to a particular attendee, while section 4.4.2 explains how to browse the all the allocations that have already been made.

4.4.1 Allocating a Room to an Attendee

To allocate accommodation to an attendee.

1. Open the *Attendee List Screen* (Figure 4-3). Highlight the attendee for whom you wish to allocate accommodation and click the `Rooms` button. The *Room Allocation List Screen* appears.

Figure 4-6 Room Allocation List



   The screen will be blank, because no accommodation has yet been allocated. (If you have already made one or more room allocations for this attendee, these will be listed. To see who else is allocated to that room, highlight the room allocation and click the `Room` button.)

2. To edit an existing allocation, click the Edit button. To enter a new allocation click New. The *Room Allocation Maintenance Screen* appears.

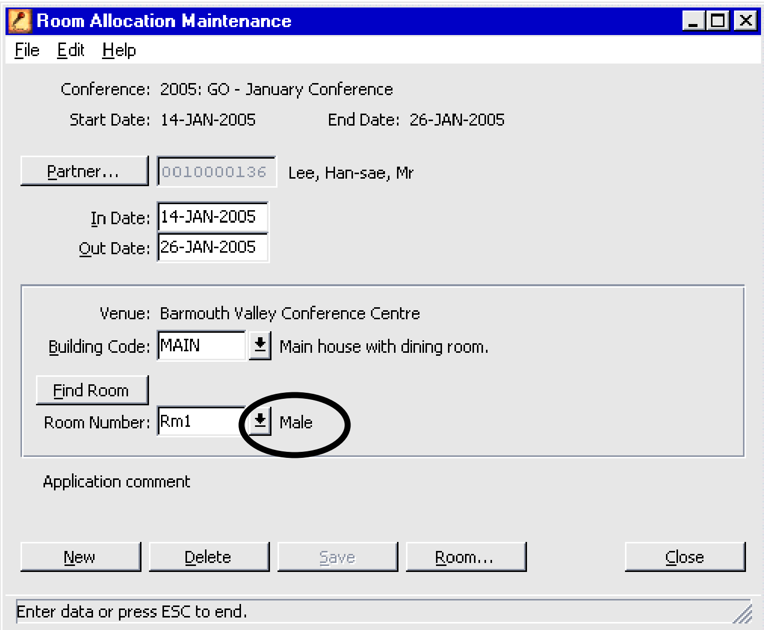


Figure 4-7 Room Allocation Maintenance Screen

When the screen opens, the partner key, arrival and departure dates will already contain the correct information.

In Date and **Out Date** Normally an attendee will be in the same room for the whole of the conference, and so these do not need to be altered. However, sometimes it may be necessary for an attendee to move. For example they may be at the conference in a room with other volunteers for 5 days before the conference, and then join the conference proper. In this case they may need to have two different room allocations, one for each period. PETRA may not allow you to enter a single allocation spreading beyond the conference dates.

Building Code This may be blank, or it may show the last building that you worked with. Using the drop-down button, select the building in which you would like to allocate the attendee a room.

Room Number If you know the room in which you would like to allocate the attendee, enter the room now. Otherwise click the Find Room button and PETRA will suggest a room. If you wish to see who is already allocated to that room before accepting this suggestion, click the Room button. A box appears showing who is already there. You can select a different room using the drop-down button.

Note - Check room usage If you try to assign a person to a room which already has a member of the opposite sex assigned to it, PETRA will warn you, and prevent you from doing this (except in the case of persons linked to the same family record, like a husband and wife.) PETRA displays the Room Usage label described in 3.3.2, 'Setting up Rooms' (see circle in Figure 4-7). However, this is only to assist you in planning, and does **not** control the allocation. So, if a room marked Female is empty, PETRA may offer it as a suggestion for a male participant. If you accept, then of course you will only be able to add further male participants to it in future. So look for another room, already marked as male, or edit the room to change the label.

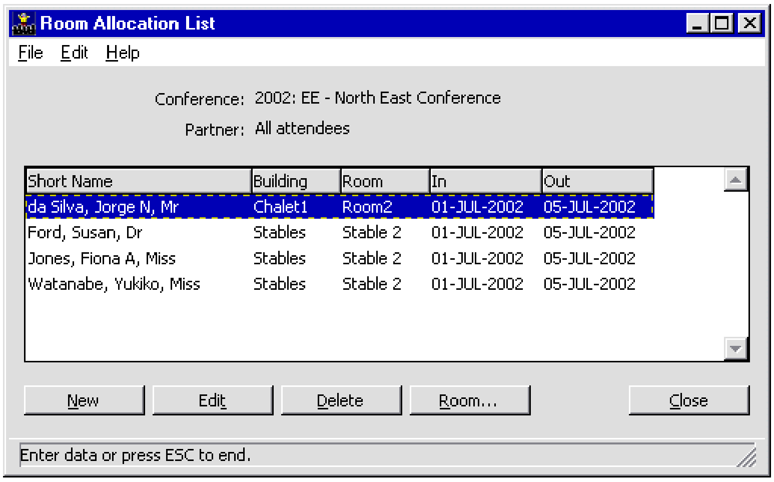
3. Click Save. If you now click the Room button again, you will see that this attendee has been added to this room. Click Close.

4.4.2 Browsing Existing Room Allocations

It is possible to browse a single list of all the room allocations that have been made, and to amend them from this list. To browse all room allocations:

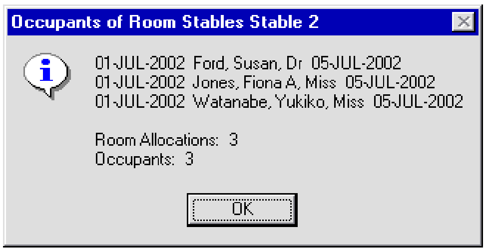
1. From the menu bar of the *Conference Management Welcome Screen*, select `Conference Management` and then `Room Allocation`. The *Room Allocation List Screen* appears.

Figure 4-8 Room Allocation List Screen



2. You can browse all existing room allocations. To see who is sharing a room for a particular allocation, highlight it and click the Room button. A summary box appears showing details of all allocations to this room. In each case the name is shown between the begin and end dates for each allocation. Note that there may be more than one allocation shown for an occupant, covering different dates.

Figure 4-9 Room Occupant Summary

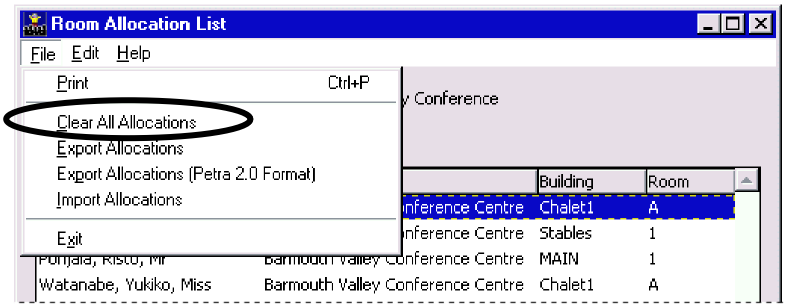


4.4.3 Clearing Allocations

Occasionally you may wish to clear all existing room allocations and start again. This may occur, for example if you have started allocating some participants to rooms, and then suddenly some rooms become unavailable, or there is a large increase in numbers, or there is a need to set-up rooms for a different number of beds. It is possible to clear all allocations in a single operation. If you have more than one conference set-up, then this will only clear room allocations for the active conference.

1. From the menu bar of the *Conference Management Welcome Screen*, select `Conference Management` and then `Room Allocation`. The *Room Allocation List Screen* appears.

Figure 4-10 File menu on Room Allocation List, showing Clear All Allocations option



2. On the menu bar, select `File`, then `Clear All Allocations`. You can now start allocating accommodation from the beginning again.

4.5 Assigning Conference Groups

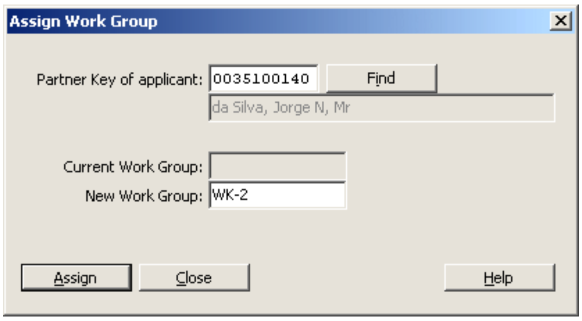
There are two ways of assigning an attendee to a group. First, this can be done from the *Attendee List Screen*, by selecting an attendee and clicking `Edit` (see section 4.2). However, when allocating a large number of attendees, it may be easier to use the special menu items in the Conference Management menu (Fellowship, Discovery and Work Groups.)

The method is the same, and will be shown for the example of Work Groups.

> **Note** Fellowship Group is normally set by the Sending Field and should not be changed without the agreement of the Sending Field.

1. From the `Conference Management` menu (see Figure 1-4, on page 7), select `Assign Work Groups`. The *Set Work Group Screen* appears.

Figure 4-11 Set Fellowship Group Screen



2. Click on the Find button. A Find screen appears. Click on the Search button to list all attendees (or use the Find criteria if you are looking for one particular participant first. Highlight the attendee you want and click `Accept` to return to the *Set Work Group Screen*.
3. Enter the work group code for this attendee as **New Work Group**, and click `OK`. If you have already entered a work group it will be shown as **Current Work Group**. If you do not want to change this group, either click `End` or else type it again into **New Work Group**, and click Assign.
4. If you wish to set the work group for another attendee, after clicking Assign, click Find again to select a new attendee. When you have finished, click the Close button.

4.6 Arrival and Departure Dates

When attendees are loaded into the Conference Management system, known travel details are loaded at the same time, including estimated arrival time. These can be printed out as Arrival Listing, Arrival Transport and Departure Transport reports (see section 4.7).

At a conference it is necessary to record the dates at which an attendee actually arrives and leaves.

To enter the actual arrival or departure date of an attendee:

1. From the menu bar of the *Conference Management Screen*, select `Conference Management` and then `Record Arrival Date` (or `Record Departure Date`).

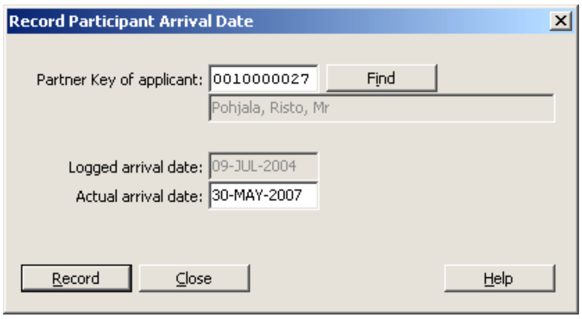


Figure 4-12 Record participant Arrival Screen

Partner Key If you know the key of the attendee, enter it directly. Otherwise Use the Find screen to select the attendee

Logged arrival date Normally this field is blank. If the actual arrival date has already been entered, the existing entry will be shown here.

Actual arrival date For a new entry, this is automatically shown as today's date. If necessary change to the correct date.

3. Click Record. If you need to do this for several attendees, after clicking Record, enter the new attendee and repeat the process. When you have finished, click the Close button.

Tip - Set Blank Departure Dates It may be difficult to set all departure dates individually if many people are leaving together. The `Set Blank Departure Dates` item on the menu sets the departure dates to today's date for all attendees for whom a departure date has not been entered.

4.7 Adding Extra Costs for Individual Attendees

Sometimes an individual attendee will incur extra costs which are not normal costs for the conference. Examples are international telephone calls or hire of bed sheets if someone forgot to bring what they need. PETRA can record these costs.

Example: Risto Pohjala had to make a long international phone call, costing 50 Croatian Kuna.

1. From the *Conference Management Screen*, click `Conference Management` and then `Browse Attendees`. The *Attendee List Screen* appears.

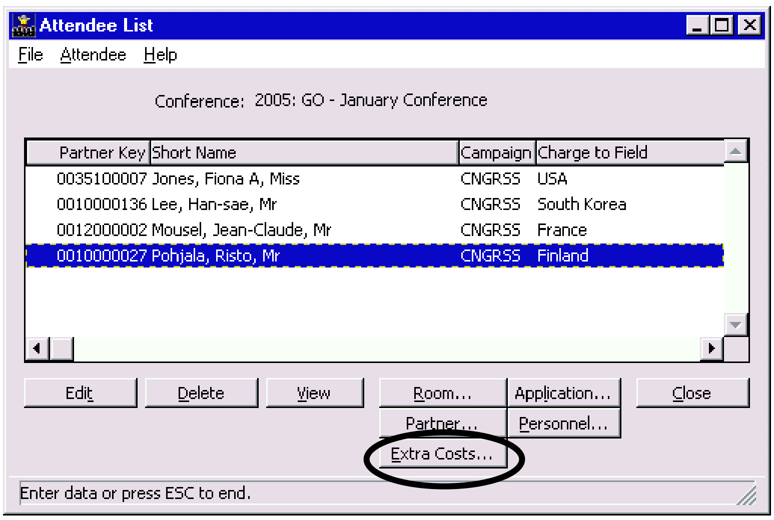


Figure 4-13 Attendee List Screen showing required partner highlighted, and the Extra Costs button.

2. Highlight the partner, Risto, and click the Extra Costs button. The *Conference Extra Costs List Screen* appears (Figure 4-14. This shows that one extra cost item has already been recorded for Risto.

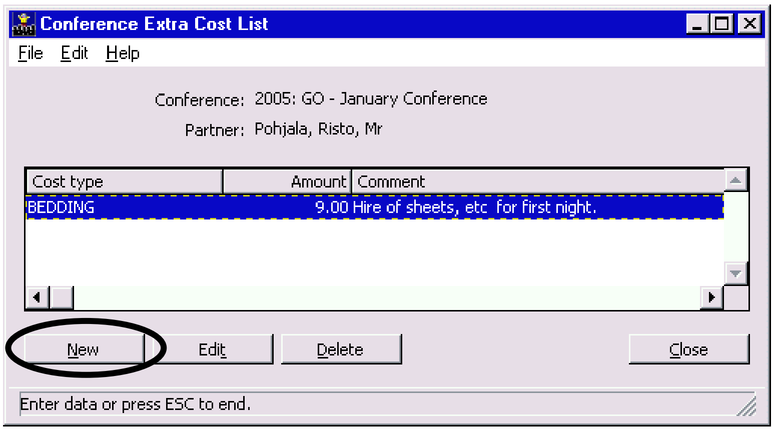


Figure 4-14 Conference Extra Cost List

3. Click `New`. The Extra Cost Maintenance Screen appears.

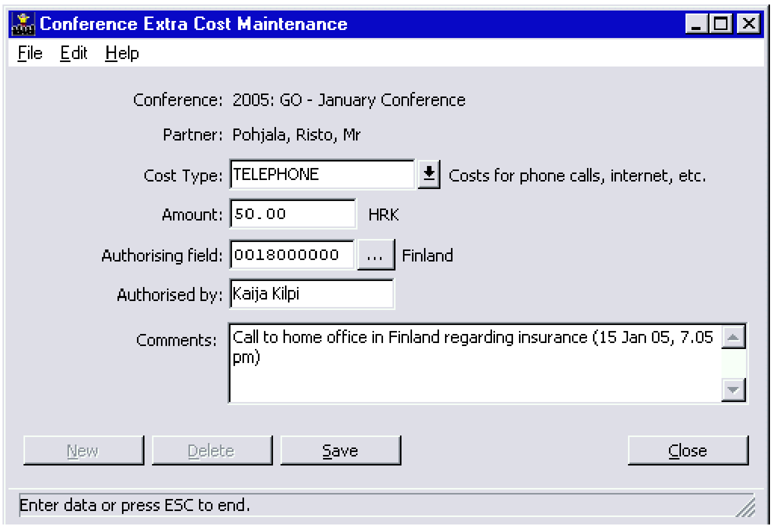


Figure 4-15 Conference Extra Cost Maintenance Screen after completing entry

4. Enter data as appropriate.

   Cost Type Select the most appropriate category of cost. If required, additional types can be set up, as described in section 3.4, page 22.

   Amount Enter the amount in the local currency.

   Authorising Field This will usually be the field who authorised the cost of attendance at the conference, as set up in the Finance Details of the application. The ‘Charged Field’ is entered by default.

   Authorised by Enter the name of the person who authorised that this cost could be charged to the field selected.

   Comments Give a brief explanation of the cost, giving information that may be helpful to anyone who has to examine costs later.

5. Click `Save`. Then click, then `Close` several times to get back to the required point in PETRA.

4.8 Exporting and Importing Attendee Details and Room Allocations

It is sometimes necessary to export or import details of conference attendees. This may be either to share with someone else who is assisting with the conference management, or for archive purposes when a conference is deleted (see section 2.3, page 10).

There are two separate operations in PETRA.

- Export/import of **accommodation allocations**. This relates to the allocations of people to rooms at a particular conference; it does not refer to the codes and capacities of rooms and buildings themselves, which can be exported as accommodation (see section 3.3.3, page 21.)
- Export/Import of **attendee details**. This relates to other attendee details, such as work group allocations (but not travel details).

In each case the data is exported to a data file (text format) which can then be imported into another system, or the same system at a later date.

Exporting/Importing Attendee Details

1. On the *Conference Management Screen*, select `Conference Management` and then `Browse Attendees`. The *Attendee List Screen* appears. On the `File` menu there are options to export and import attendees.

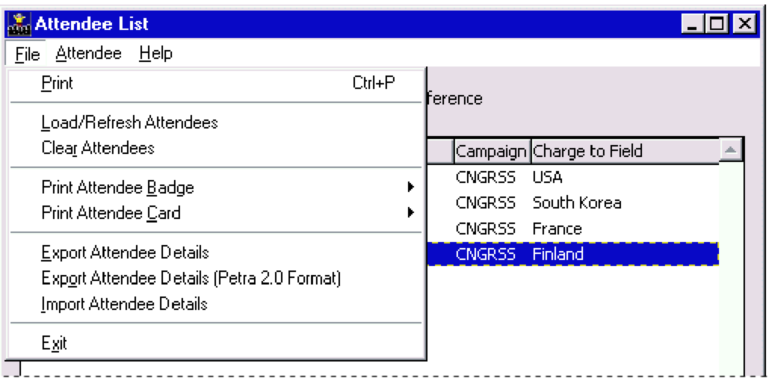


Figure 4-16 Attendee List Screen showing File options

2. To export all details for all attendees to a text file, select `Export Attendee Details`. To import attendee details from a text file, select `Import Attendee Details`. It is also possible to export details in PETRA 2.0 format to import into a system that has not yet been upgraded to PETRA 2.1.
3. A File Directory Browse screen appears. If exporting, select a location to store the file, give it a name and click OK. PETRA will add the suffix ".ptc" to such export files. If importing, find the previously stored file and click OK. The data is then imported to your current Conference Management System for the active conference.

Exporting/Importing Accommodation Allocations

Be careful in using this facility. If you export allocations, you can only import them again provided that the same accommodation has been set-up. If a room has been deleted, there may be problems.

1. On the *Conference Management Screen*, select `Conference Management` and then `Room Allocation`. The *Room Allocation List Screen* appears. On the `File` menu there are options to export and import room allocations.

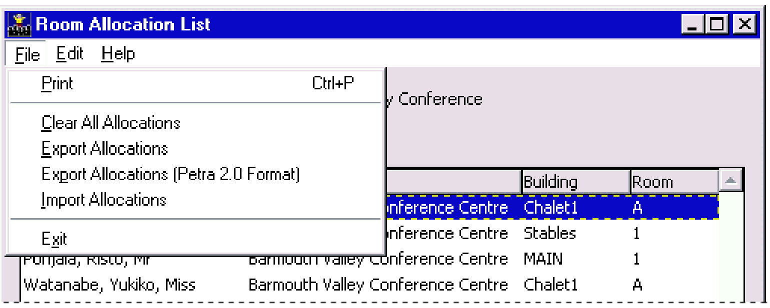


Figure 4-17 Upper part of Room Allocation List, showing File menu

> **Warning** For the next step be very careful. The item on the menu list which is above the one you want is `Clear All Allocations`. If you click this by mistake, all allocations will be cleared!

2. To export room allocations for all attendees to a text file, select `Export Allocations`. To import room allocation details from a text file, select `Import Allocations`.
3. A File Directory Browse screen appears. If exporting, select a location to store the file, give it a name (you must type the suffix .txt) and click OK. If importing, find the previously stored file and click OK. The data is then imported to your current Conference Management System.

----- End of Chapter 4 -----

Chapter 5 Conference Reports

PETRA provides a large number of reports to support conferences. These may be printed from the `Reports` menu on the *Conference Management Screen*.

Figure 5-1 Conference Reports Menu

Since there are many reports, some are grouped into a second-level menu, as shown in Figure 5-1 for the Attendance reports. Short-termer reports is a link to the Personnel module short-termer reports (see the PERSONNEL USER GUIDE.)

When you select certain reports, you are taken directly to the Print Screen. However, for some reports another screen appears first, to allow you to select exactly what you want. This can take three forms.

- For some reports you can select whether to print data just relating to the conference that you are working on, or for all conferences set-up on your system. (The latter can be useful for attendance reports.)
- For Sending Field and Campaign reports you need to select the sending field or campaign for which you are producing the report.
- For the detailed attendance report you can select the period (dates) to be covered. If the total period covered by conferences is too long (about 18 days) then it is not possible to print the total period on one sheet of paper, and lines may ‘wrap’ making it difficult to read. If you select shorter periods you can print separate reports for the first and last parts of the total date range.
- For Campaign and Receiving field reports, further options are available. This are explained below, in section

The following table provides a brief description of the conference reports.

Report	Description
Attendee listing reports	
Alphabetic listing	Lists all conference attendees in alphabetical order (several variants.)
Alphabetic listing by extract	Similar to Alphabetic listing, but allows you to select an extract of attendees.
Arrivals Listing	Report is printed for a particular day, and lists all those scheduled to arrive on that day, including their travel details and accommodation.
Police listing	Lists the basic details sometimes required by the local police/immigration department (name, passport number arrival and departure dates).
Family listing	Lists attendees for whom more than one family member is present.
Present Attendee	Shows all people at the conference on the day the report is run, including those with an actual arrival date on that day, but excluding those with a departure date on that date.
Absentee listing	Lists those attendees who did not arrive (those for whom actual arrival has not been recorded in PETRA).
Travel reports	
Arrival Transport	Lists scheduled arrivals for a particular day in time order. Option allows you to select only those who require local transport..
Departure Transport	Lists scheduled departures for a particular day in time order. Option allows you to select only those who require local transport..
Arrivals Groups Listing	Lists attendees, grouped in Arrivals Groups. Option to list people not assigned to any group.
Depart. Groups Listing	Lists attendees, grouped in Departure Groups. Option to list people not assigned to any group.
Accommodation reports	
Brief Accommodation	For each day of the conference lists the occupancy of each building.
Full Accommodation	As the Brief Accommodation Report, but lists each room, and also shows which attendees have not been allocated a room.
Detailed Accommodation	Similar to Full Report, but gives names of those allocation to each room. Does not list those who are not yet allocated a room.
Comments	Prints the comments field of applications.
Group reports	
Groups Listing (alphabetic)	Listing of all conference attendees showing assignments to fellowship, discovery and work groups.
Discovery, Fellowship, Work, Arrival, Departure Groups Listing	A set of reports showing attendees listed by the type of group named in the report.
Field reports	
Sending field	Prints details for a particular sending field (which must be selected). There are various options to meet the needs of particular sending fields, such as signing to agree the charges.
Target Fields	Lists all attendees who will go to a particular field. Options allow specific fields or all fields, and different details of financial information.
Charged Field Report	Lists those who attended, with costs, for each field to be charged.
Registering Field Report	Lists those who attended, with costs, for each field who registered applicants.
Campaign	Lists all conference attendees, sorted by campaign, giving key information. Options all fuller information to be provided.
Extra Costs	Lists extra costs incurred for single partner, extract, or all partners

Report	Description
Attendance Summary	Summary of numbers attending for each day.
Languages Summary	Lists number of speakers (mother tongue) of each language present.
Nationality Summary	Lists numbers of each nationality attending.
Age Summary	Provides statistics on the number of people of different ages attending.
Conference Role Summary	Lists numbers for each conference role (normal participant, speaker, etc)

The following sections are just examples of how reports are printed. For many reports there are dialogue boxes that allow options to be selected (for example, exactly who to include, whether to print names starting with different letters of the alphabet on separate pages, etc.)

5.1 Campaign and Receiving Field Reports

Receiving field and Campaign reports all have an extra screen offering the choice of which campaigns or receiving fields should be included. The following description shows a Campaign report, but the Receiving field reports are similar. To print a Campaign Report.

1. On the *Conference Management Screen*, select `Reports`, then `Campaign`. The *Campaign Report Screen* appears.

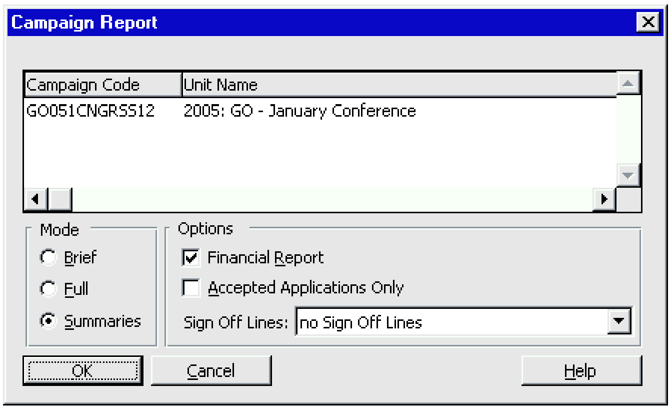


Figure 5-2 Campaign Report Screen

2. In the upper part of the screen, select the Campaign for which you require a report. If more than one campaigns are listed, you can select more than one. If you do not highlight any of them, then all will be selected.
3. Select Mode and Options as follows:

   Brief or **Full** give reports on those attending with different amounts of detail.

   Summaries gives only summary information for all attendees (no names or individual data). This is applicable to the Financial Report Option in the next item.

   Financial Report If this option is selected, costs details are included in the report.

   Accepted Applications only If this is checked, only applications of status Accepted are included in the report.

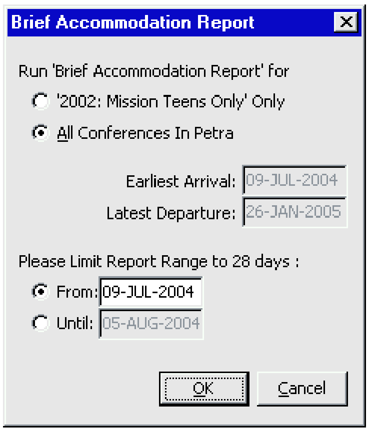
   Sign off Lines If you wish to print lines on the form for the reports to be signed off, select the required option. This can be either just to sign off to confirm who attended, or the actual financial figures.
4. Click OK.

5.2 Accommodation Report showing Date Selection

As mentioned, many reports allow you to select dates, etc. The Brief Accommodation Report is an example. To run a Brief Accommodation Report:

1. On the *Conference Management Screen*, select `Reports`, then `Accommodation`, then `Brief Accommodation`. A dialogue box appears, offering options.

Figure 5-3 Campaign Report Screen



2. Select the options required. At the top of the screen, you can select either the active conference or all conferences. The accommodation reports print a separate column for each night, and so could be quite big. For this reason the first and last dates of accommodation entered are shown. It is necessary to limit the date span to a maximum of 28 days.
3. Enter the first and last dates of the range that you require (no more than 28 days.)
4. Click OK. The report will be printed in the normal way.

----- End of Chapter 5 -----

Index for Conference Management User Guide

Tip If using Acrobat Reader to view on line, you can jump to the page. Find the item in the index, click once in the box at the bottom of the Reader screen to highlight the field, type the page number you want, and then press the <Enter> or <Rtn> key. This takes you immediately to the page.