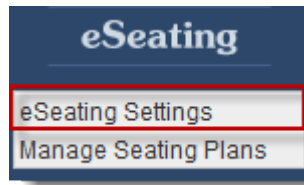


## eSeating 2.0 Manual

**Setting up your eSeating module:** To begin setting up your eSeating module click on the eSeating Settings tab as shown below.



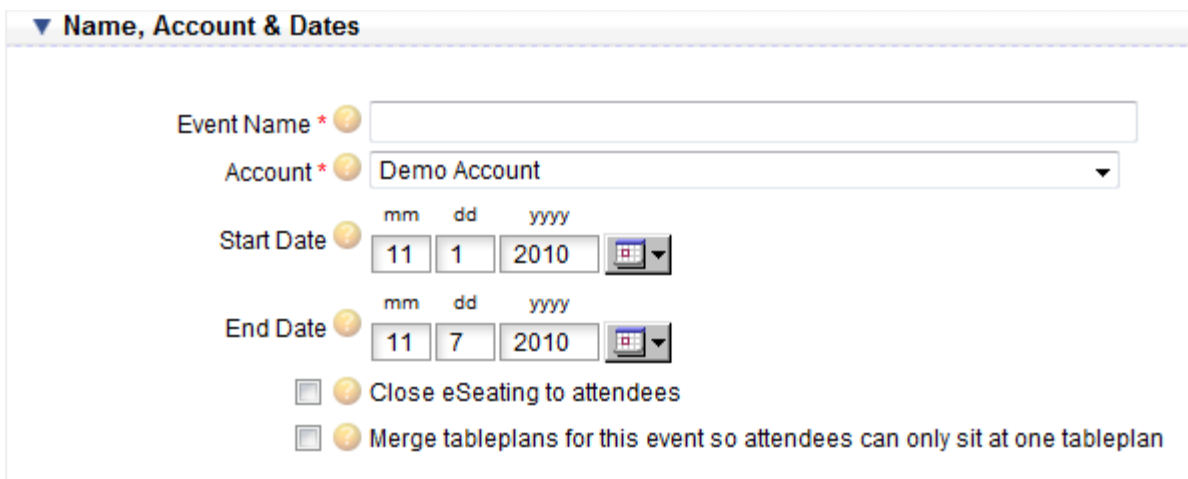
**Event Info:** the Event Info tab is one of three in eSeating; Event Info, Table Categories, and Table Plan.

You can change between the three tabs by clicking on any of them as shown below.



**Name, Account & Dates:** in this section you can edit the name and basic info about your event.

Typically these fields will be pre-populated with what is entered in eReg.

A screenshot of the "Name, Account & Dates" form in the eSeating application. The form has a title bar with a downward arrow and the text "Name, Account & Dates". Below the title bar, there are several fields: "Event Name" with a red asterisk and a help icon, "Account" with a red asterisk and a help icon, "Start Date" with a help icon, and "End Date" with a help icon. The "Event Name" field is empty. The "Account" field is a dropdown menu showing "Demo Account". The "Start Date" field has three input boxes for month (11), day (1), and year (2010), followed by a calendar icon. The "End Date" field has three input boxes for month (11), day (7), and year (2010), followed by a calendar icon. Below the date fields, there are two checkboxes: "Close eSeating to attendees" and "Merge tableplans for this event so attendees can only sit at one tableplan". Both checkboxes are currently unchecked.

**Event Name:** this is the name of your event as it will appear both on the back end of the system when you are editing it, and also how it will appear to your attendees as they register.

**Account:** the account in which the event is placed will be displayed here. – We might want to take this out because clients won't see the account field...so maybe we use a screenshot using our etouches training user, to avoid the account field from showing.

**Start Date:** the start date of your event is shown in these boxes, this date will populate throughout all modules.

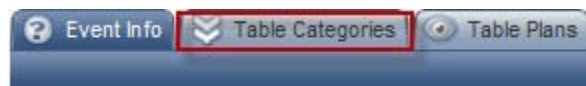
**End Date:** the end date of your event is shown here, this date will populate throughout all modules.

**Close eSeating to attendees:** by checking this box you are closing eSeating to all your registrants, this means they will not be able to participate in the seating selection process during the eReg registration.

**Merge tableplans for this event so attendees can only sit at one table plans:** check this box if you have multiple tableplans and want to make sure that your attendee does not seat themselves at multiple tables. This feature can be used when handling large events.

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**Table Categories:** in the table categories tab you can add/edit your table categories.



**Adding a Category:** Table categories allow you to customize the availability and behavior of a group of tables in the seating process. To add a category click on the “Add Category” button as shown below.

You can link a Table Category to an eReg Category and prevent different eReg Categories from sitting together.

#### ▼ Table Categories



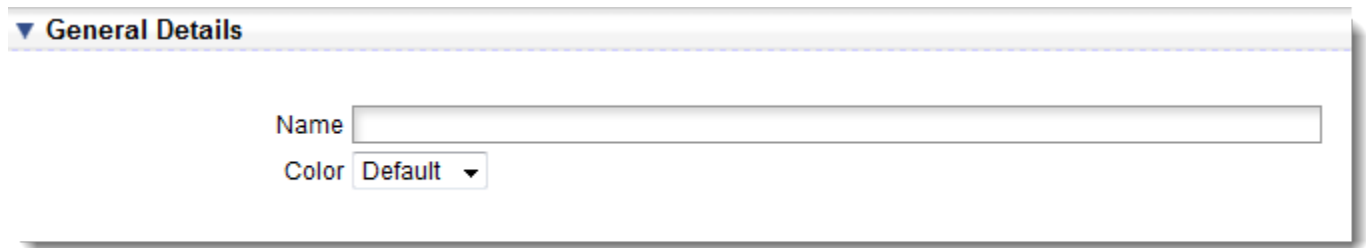
Table Categories allow you to customize the availability and behaviour of a group of tables in the seating process.

You have not currently specified any table categories for this event. In order to create a category, please click the button that says "Add Category".



Add Category

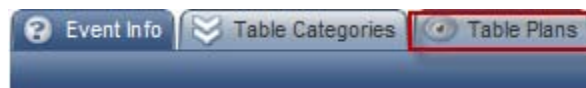
**General Details-** in this section you can add the name for your category and select a color to be assigned to it.

A screenshot of a web form titled "General Details" with a dropdown arrow. The form contains two fields: "Name" with a text input box, and "Color" with a dropdown menu currently showing "Default".

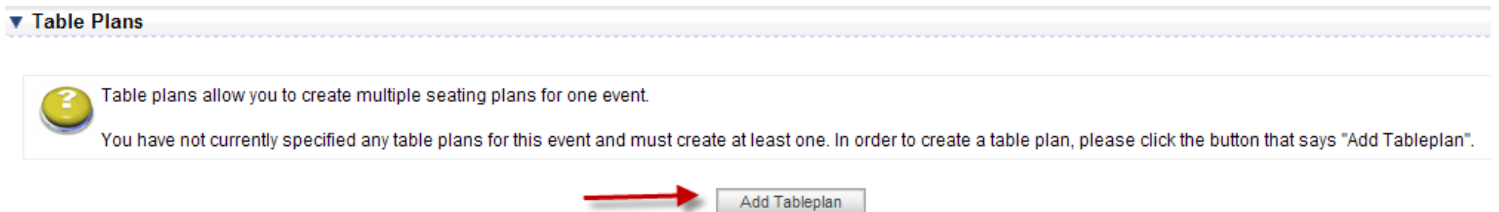
**Name:** input a name for your category in this field. This name will be used when managing your floor plan. If linking a Table Category to an eReg Category, be sure that they are named the same i.e. VIP and VIP.

**Color:** You can color coordinate your categories to make them stand out more in your seating table plan.

**Table Plans:** in the table plans tab you have the ability to add table plans to your event as well as manage those table plans.



**Adding a Table Plan:** you can add multiple table plans to one event and use them as sections of one large table plan rather than separate ones. Or you can add multiple table plans for each seating function at the event, Keynote Presentation, Gala Dinner, etc. You can add a table plan by clicking the "Add Tableplan" button.

A screenshot of the "Table Plans" section. It features a header "Table Plans" with a dropdown arrow. Below it is a message box with a question mark icon, stating: "Table plans allow you to create multiple seating plans for one event. You have not currently specified any table plans for this event and must create at least one. In order to create a table plan, please click the button that says 'Add Tableplan'." At the bottom of the message box, a red arrow points to a button labeled "Add Tableplan".

**General Details:** in this section you will have to enter the general details about your table, such as the name and any notes associated with it.

▼ General Details

Name

Notes

**Name:** Enter the name of your table plan here. A more descriptive title is encouraged because it helps your attendees make the correct selection when picking which table to be seated at.

**Notes:** These notes are for internal purposes, to help you and your colleagues identify the table plan.

**Table Plan Availability:** The Table Plan Availability will allow you to limit the seating within the eSeating module as shown in the screen shot below.

▼ Table Plan Availability

Import

Seat Selection

Category

☐

Seat Selected By Registrant

Member

**Import:** Check this box if this attendee category should be imported into the eSeating database.

**Seat Selection:** Use the dropdown boxes to choose how seats should be selected for each attendee category. The three options available are described below:

- 1. Seat Selected by Registrant:** the registrant is able to select their seat during the registration process.
- 2. Seat selected by eSeating:** the registrant is seated by eSeating
- 3. Seat selected by Administrator:** the registrant should not be assigned a seat when they register, they will be seated by an administrator on the back end at a later time.

**Category:** this is a list of categories that you have set up in eReg, sub categories are listed just below the primary categories.

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**Attendee Information:** in this section you can adjust which fields will be displayed alongside the attendee in the seating selection process.

#### ▼ Attendee Information

First Name, Last Name and Company do not display below, by default the system will always display these three fields alongside the attendee. If you do not want those three fields to appear you can check off the "prevent attendees from seeing other attendees details" within the Advanced Settings section of the Table Plan.

Public	Admin	Question
<input type="checkbox"/>	<input type="checkbox"/>	Email Address
<input type="checkbox"/>	<input type="checkbox"/>	Verify Email Address
<input type="checkbox"/>	<input type="checkbox"/>	Job Title

**Public:** Check this box if you want to make this field visible to public registrants

**Admin:** Check this box if you want to make this field visible to admin registrants

**Question Column:** the list of fields comes from the questions that are on the attendee information page in eReg. To add a field to this list you would have to edit the attendee information page.

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**Advanced Settings:** in this section you can adjust the advanced settings for your attendees, such as search functions.

▼ Advanced Settings

☐ ? Disable attendee search function

☐ ? Prevent attendees from seeing other attendee details

☐ ? Always use lead attendees company name

☐ ? Hide table names

☐ ? Booker details

**Disable attendees search function:** checking this box will prevent users from searching for other attendees to see where people are sitting.

**Prevent attendees from seeing other attendee details:** checking this box will prevent attendees from seeing other attendee's information. If this is unchecked then when an attendee scrolls over another they will see the fields chosen in the previous section.

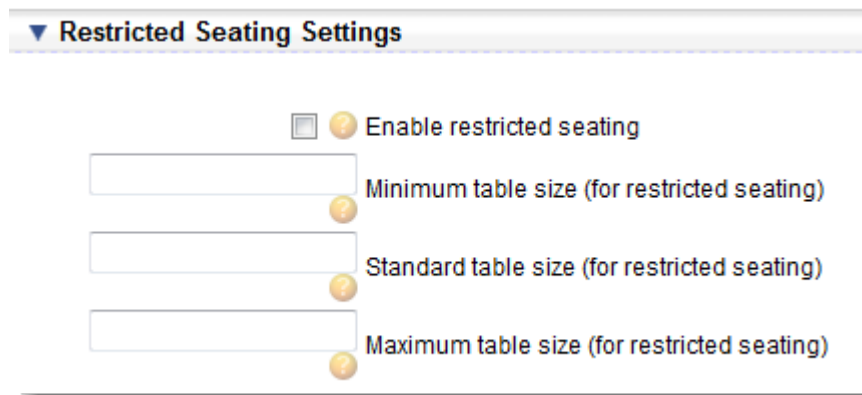
**Always use lead attendees company name:** checking this box will use the lead attendees company as the company for all the other attendees, even if the other attendees are in a different company.

**Hide table names:** checking this box will make the table names invisible to all attendees.

**Booker Details:** checking this box will display details of the booker ID and company as part of the attendee pop up. The booker ID refers to the reference number given to the attendee when registering for the event.

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**Restricted Seating Settings:** in this section you can set certain settings for restricted seating.



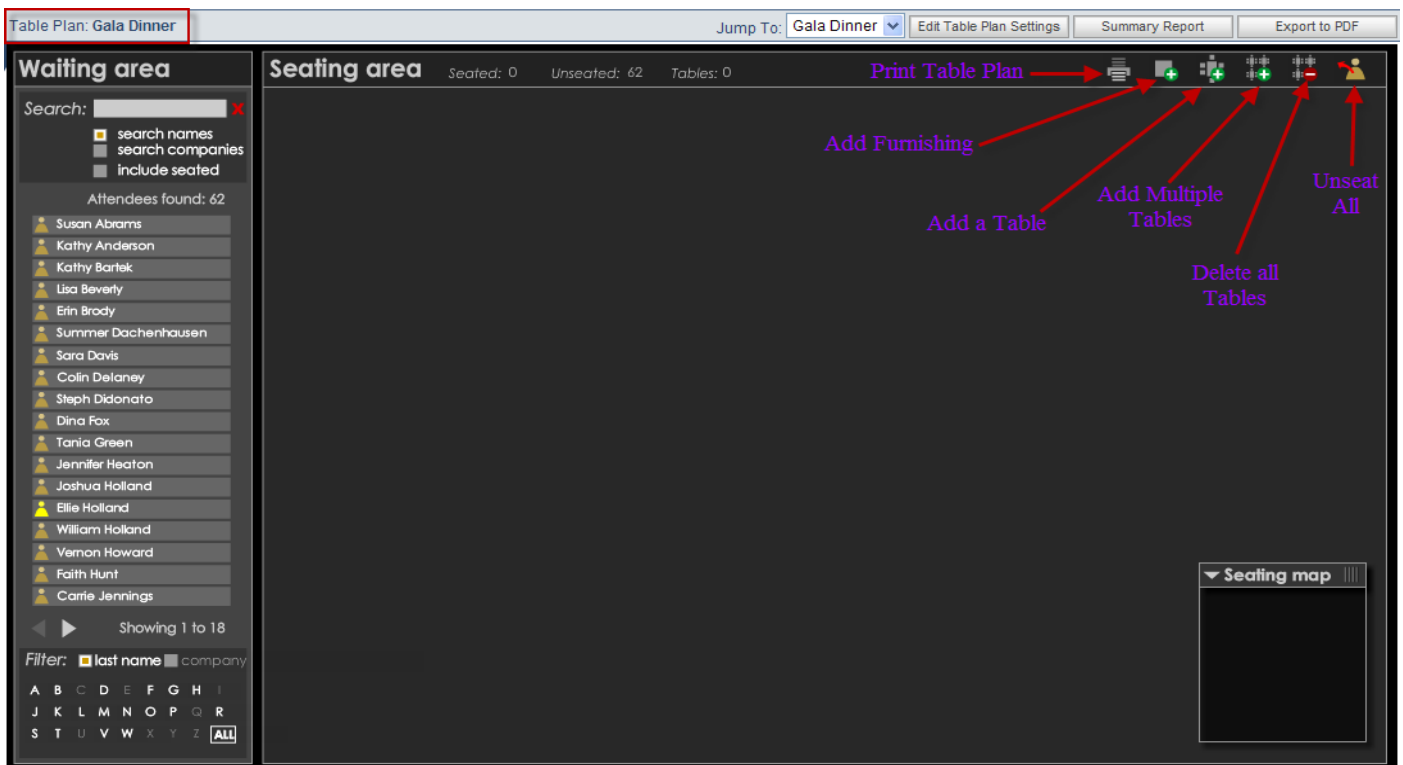
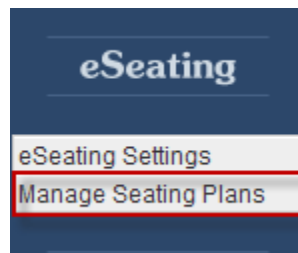
**Enable restricted seating:** checking this box will make the system only display as many seats as there are attendees in the group. It is critical that all open tables are the same size for restricted seating to work.

**Minimum table size (for restricted seating):** depending on the number entered in this field, groups of this number or higher will be sat at a full table, smaller groups will be automatically sat and not see the eSeating selection tool.

**Standard table size (for restricted seating):** input the number you want the standard table size to be.

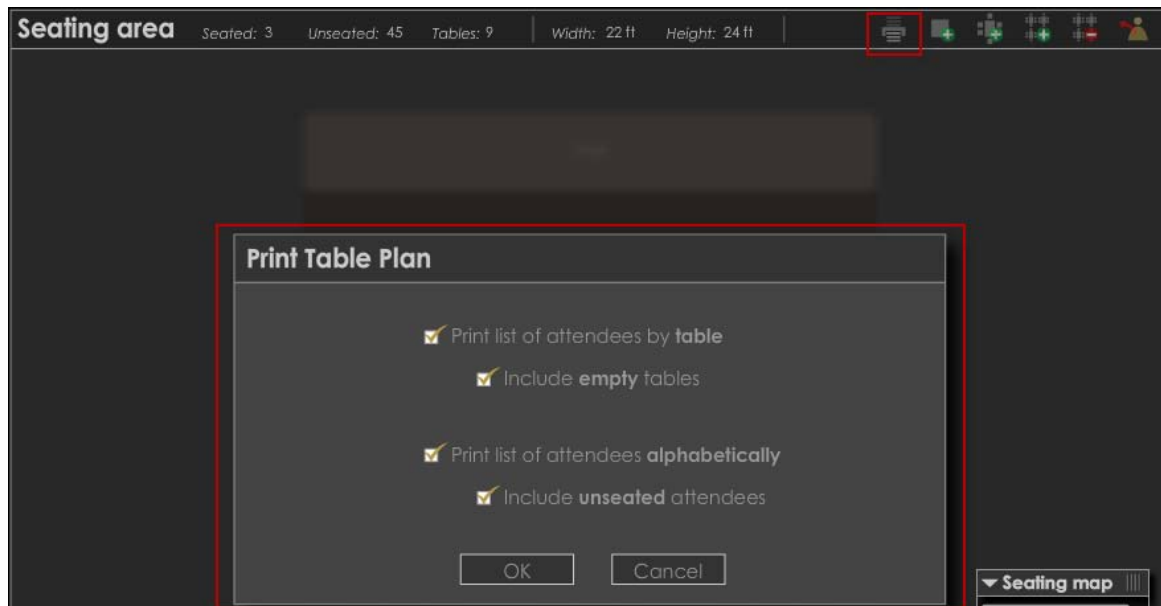
**Maximum table size (for restricted seating):** if you want to allow extra seats to be added to a table, input the maximum number of seats a table can have here

**Managing your eSeating Module:** Once you have setup your eSeating settings you can begin to manage your seating plans and attendees as shown below.



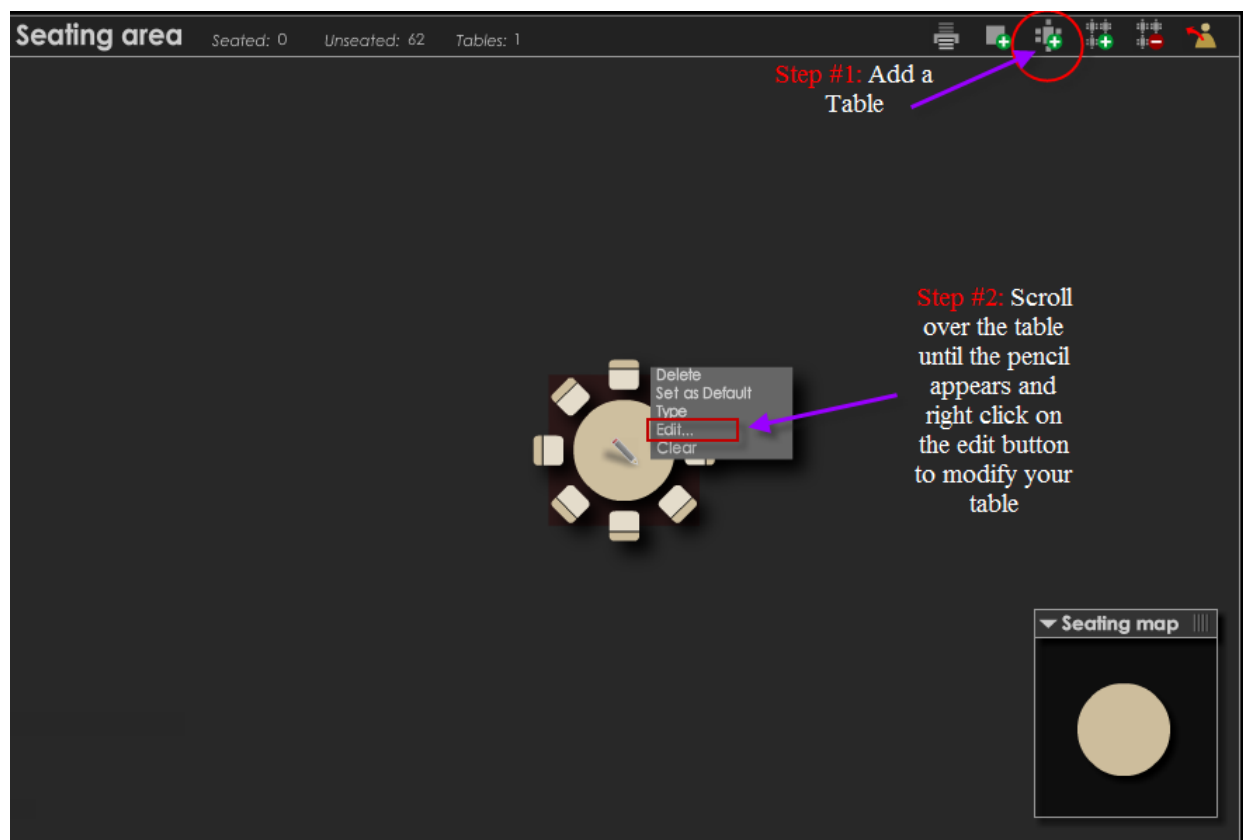
**Seating Area:** as you go through the process of creating your seating plan, you can see statistics about your plan so far, such as the number of attendees seated, unseated, and the amount of tables currently on the floor.

**Printing:** when you click the print button you will have the opportunity to print a list of attendees by table, and options to include empty tables, print your list alphabetically, or include unseated attendees.



**Adding a Table:** to add a table to your seating area, select the icon with the table and plus sign in the top right corner.





**Editing your Table:** To edit your table right click on the pencil when you scroll your mouse over the existing table. Then you can click on the edit selection that will pull up a new window.

The 'Edit Table' dialog box has a dark background and a title bar. It contains the following fields and controls:

- Name:** A text input field containing 'table 1'.
- Type:** Three buttons: 'Round' (selected), 'Rectangle', and 'Theater'.
- Category:** A dropdown menu showing 'None'.
- Seats:** A numeric input field with '8' and up/down arrows.
- Diameter (ft):** A numeric input field with '5' and up/down arrows.
- Seats on top side:** A numeric input field with '1' and up/down arrows.
- Row length:** A numeric input field with '1' and up/down arrows.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

**Name:** input the name of the table in this field.

**Type:** select between a round, rectangle, or theater table type.

**Category:** by selecting a category from your registration site you can limit who this table is available to.


**Seats:** select the number of seats that you want at the table in this field.

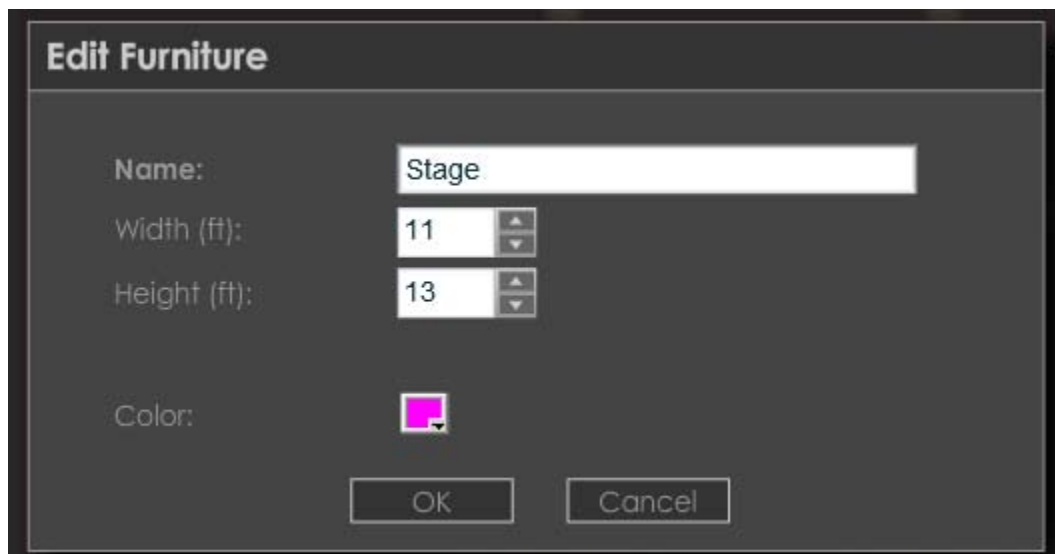
**Diameter:** select the number of feet the table's diameter should be.

**Seats on top side:** select the number of seats you want placed on the top side of the table. This option is only available when using rectangle tables.

**Row Length:** select the number of seats that should be in the row of your table. This option is only available when using theater tables.

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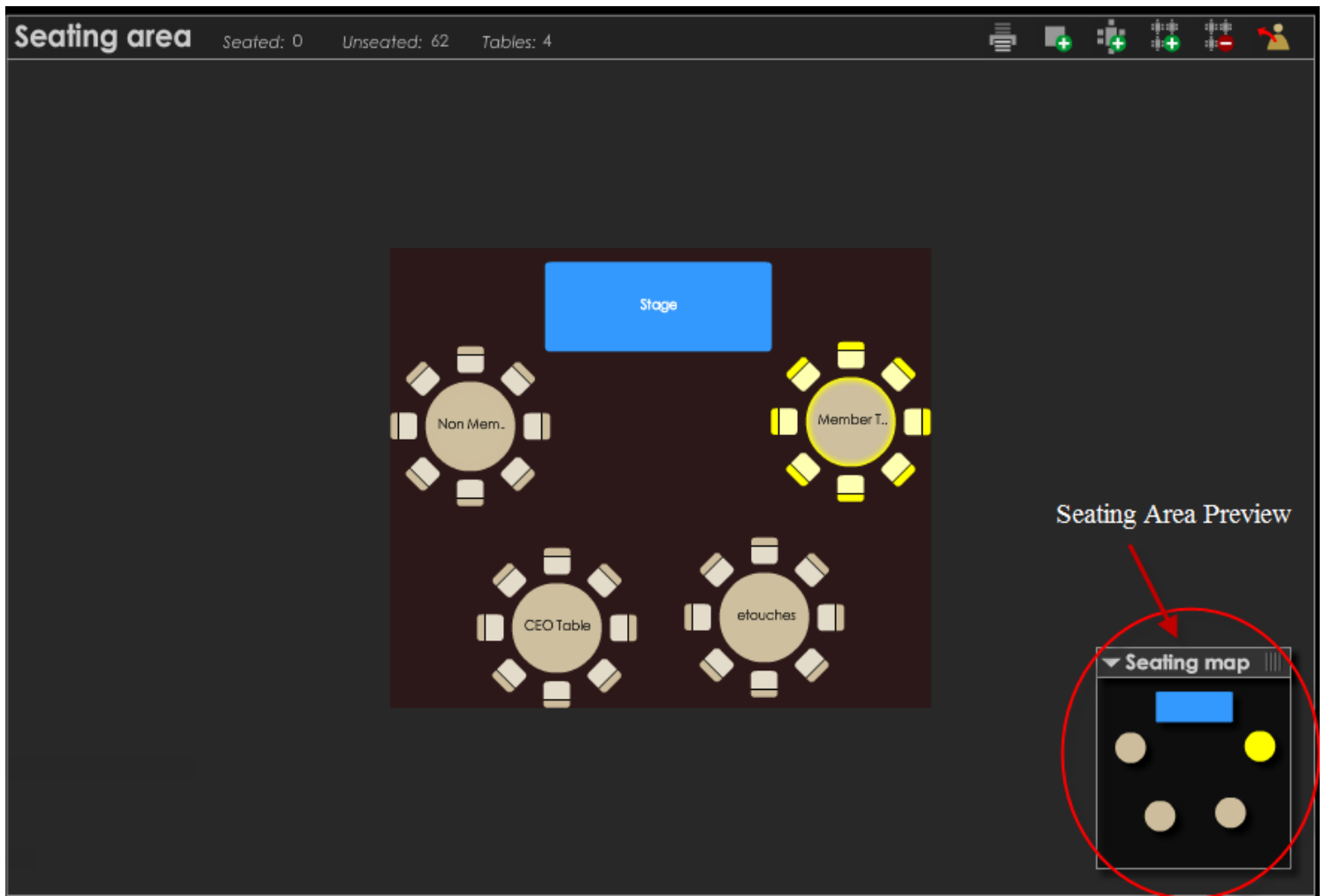
**Adding a Furnishing:** to add furnishing to your seating area select the furnishing icon (  ). You can edit the furnishing by clicking the pencil icon and then clicking edit. In the new window you can change the name, select the size, and change the color of your furnishing.



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**Seating Area Overview:** Once you have begun to add tables and/or furnishing your seating chart will begin to look like the screen shot below where you can start adjusting and modifying the setup of your

seating area to your specific look at feel. Please note you can always see the entire seating area by looking at the seating area preview.



**Seating an Attendee as an Admin User:** as an admin user you can select where you would like to seat your attendees. You will see the attendee list on the left side of your screen. You can search for attendees based on name or company. You can then seat an attendee by dragging and dropping the attendees name into the seat at the correct table.

### Waiting area

Search:

☒ search names  
☐ search companies  
☐ include seated

Attendees found: 62

Susan Abrams

Kathy Anderson

Kathy Bartek

Lisa Beverly

Erin Brody

Summer Dachenhausen

Sara Davis

Colin Delaney

Steph Didonato

Dina Fox

Tania Green

Jennifer Heaton

Ellie Holland

Joshua Holland

William Holland

Vernon Howard

Faith Hunt

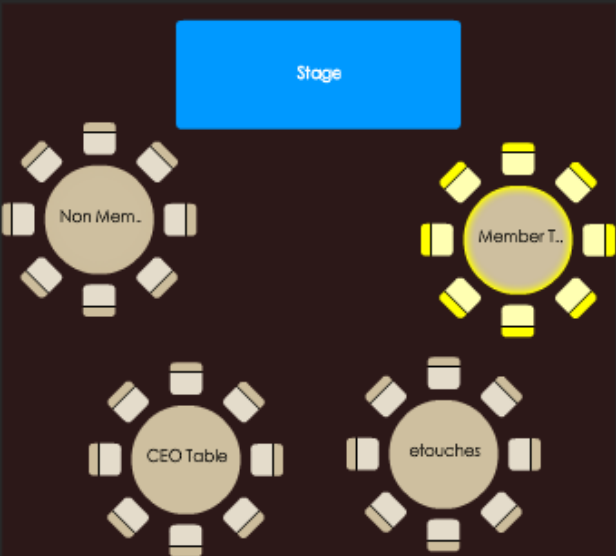
Carrie Jennings

Showing 1 to 18

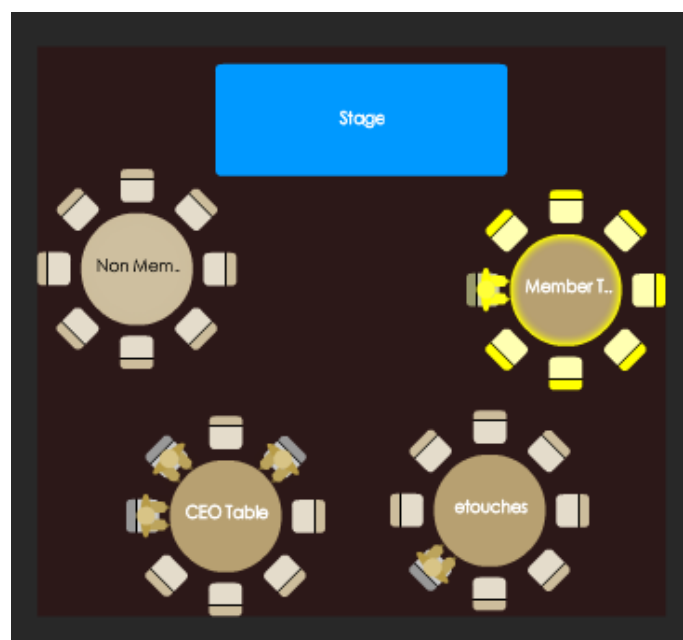
### Seating area

Seated: 0   Unseated: 62   Tables: 4   Width: 17 ft   Height: 16 ft

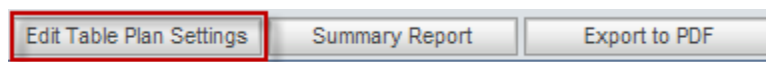
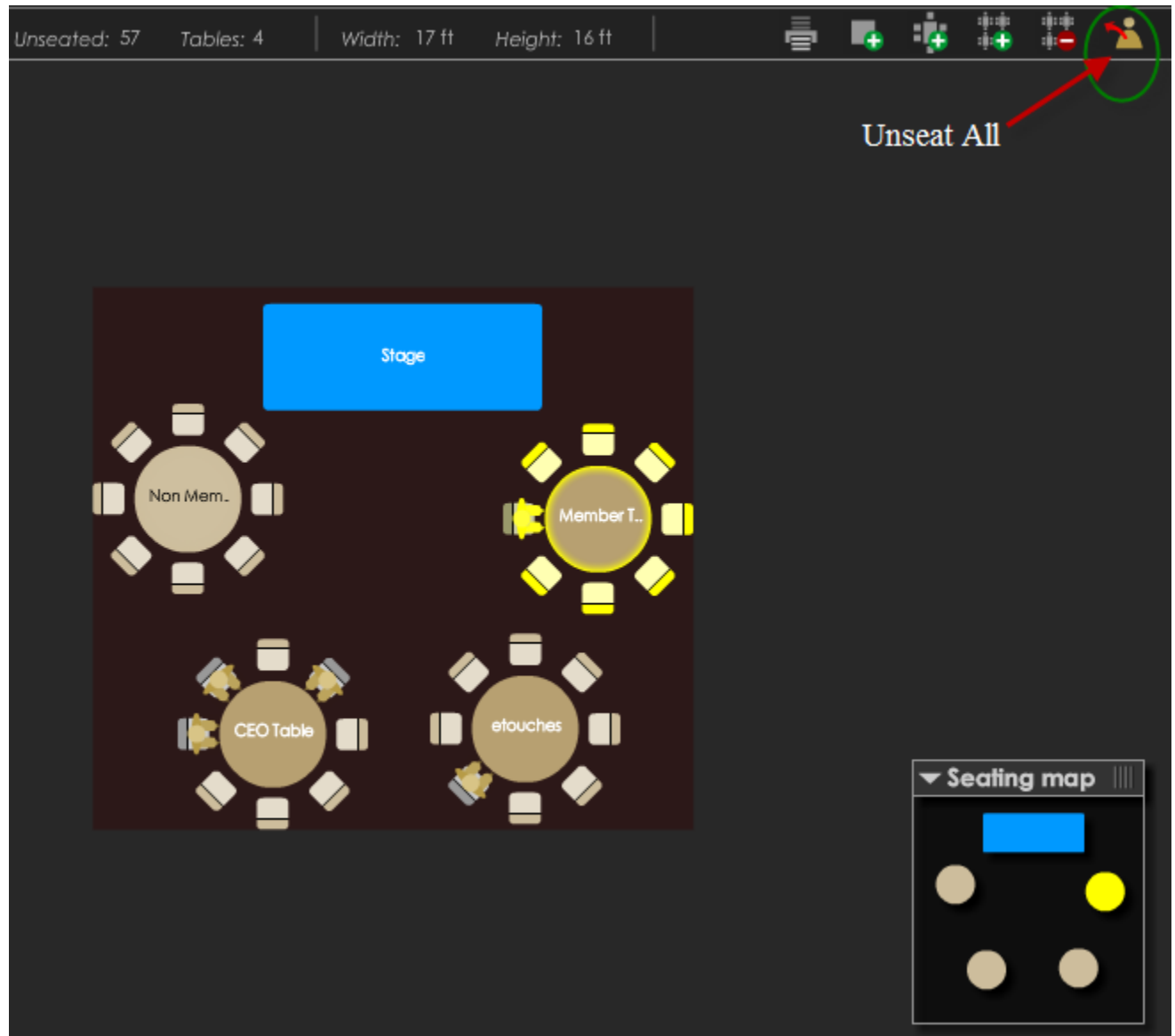
Under your attendee list on the left here you can drag and drop your attendees to place them at the seat of your choice



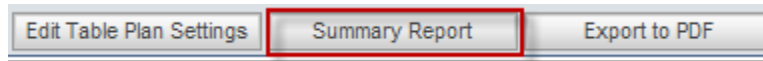
**Seated Attendees:** once you have started seating your attendees your seating area will look similar to the screenshot below. In this view it is easy to view which seats are available for attendees.



**Unseat All Attendees:** If you are unhappy with the seating arrangements you can always click on the unseat all attendees button at the top left of the seating area and begin seating your attendees again.



**Edit Table Plan Settings:** If you select to “Edit the Table Plan Settings” located at the top right of the seating area this will redirect you back to the table plan tab where you can edit the general details, table plan availability, attendee information, advanced settings, and restricted seating settings.

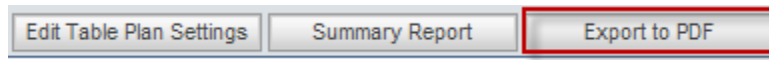


**Summary Report:** By selecting the summary report at the top right of the seating area you will have the ability to report the on all tables or reserved tables of the total attendees, total seats available and attendees who have selected a seat.

All Tables	#	% of total
Total Attendees	62	
Total Seats Available	32	
Attendees who have selected a seat	5	8%

Reserved Tables	#	% of total
Total Seats Available at Reserved Tables	16	
Attendees who have selected a Reserved Seat	1	6%



**Export to PDF:** If you choose “Export to PDF” your seating plan will export to a PDF file that looks similar to the one in the screenshot below.

