

## Online Demo Scheduling Tool: User Guide

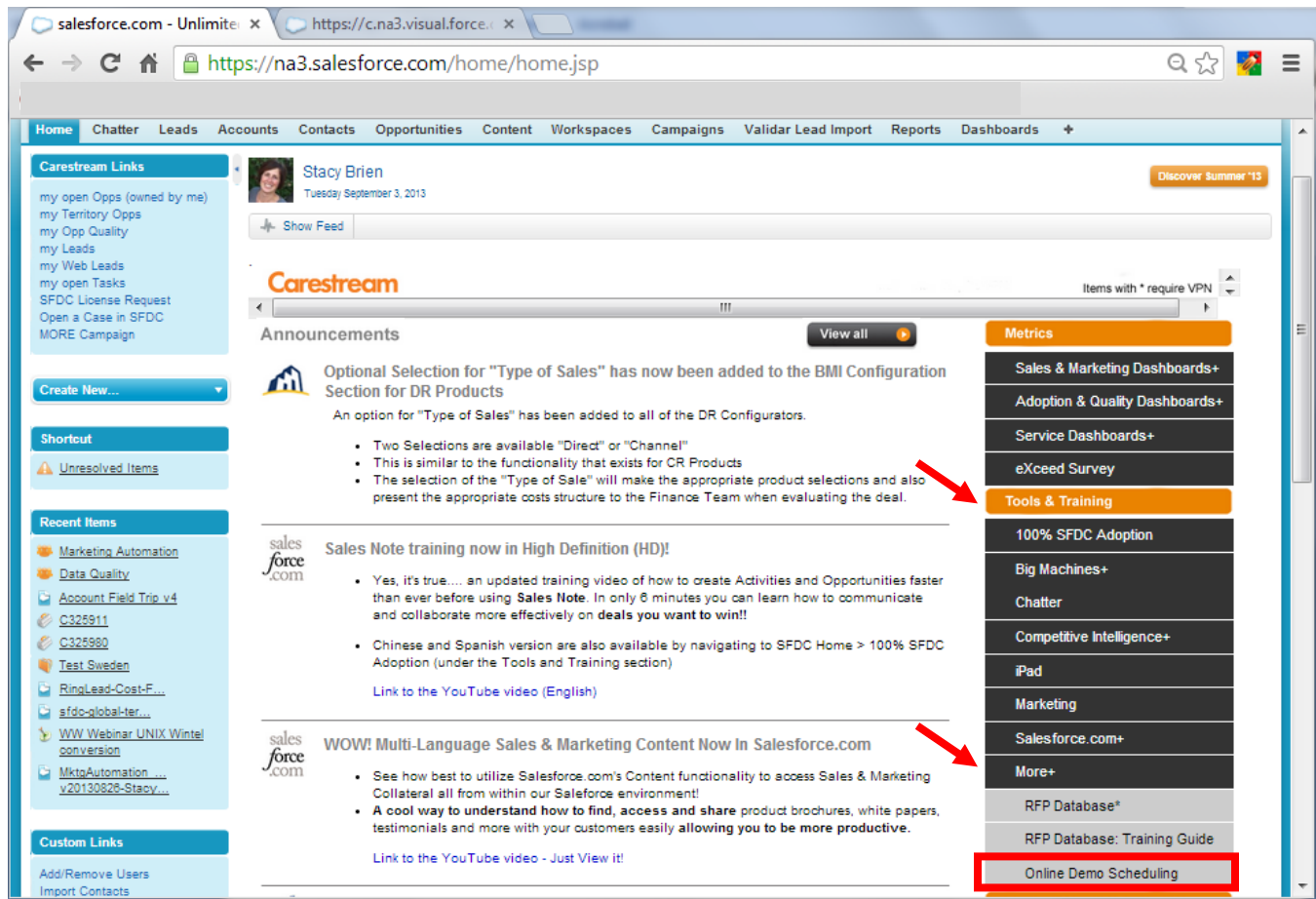
This document provides step by step instructions on how to successful use the Online Demo Scheduling tool for pre booking appointments for tradeshow/congresses.

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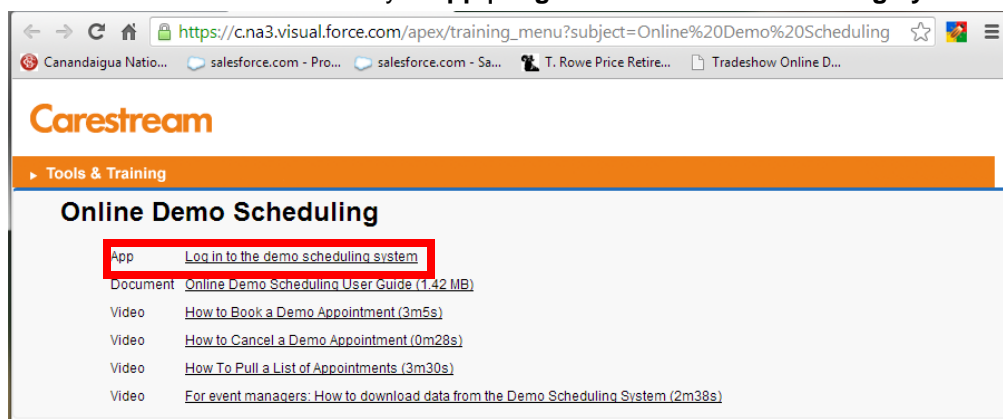
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## How to Log into the Online Demo Scheduling Tool

1. Log in to Salesforce.com, using Google Chrome or Firefox. Scroll to the bottom of the home page and select the **'More+'** button in the **Tools & Training** Menu of the right navigation.
2. The 'More+' button will expand down three options. Click on the **'Online Demo Scheduling'** button.



3. Bookmark this page in your web browser.
4. Click on the first link that says **"App | Log in to the demo scheduling system"**

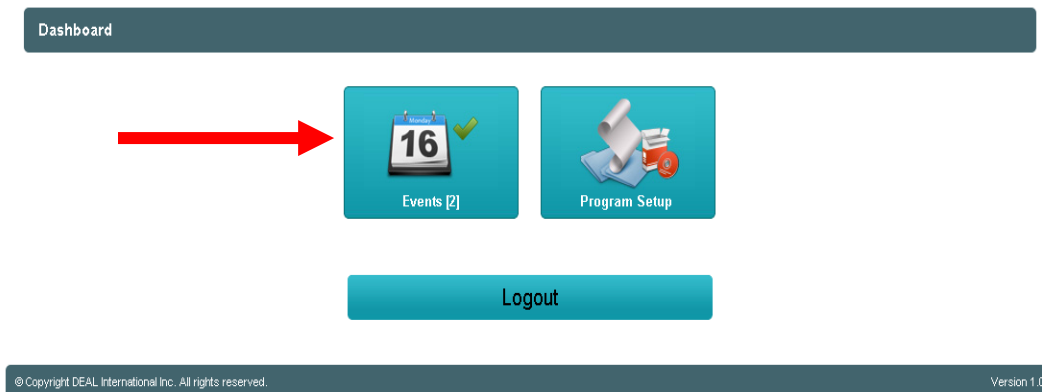


5. Log into the application (User name = Carestream email address, Password = Global ID)

## How to Book a Demo Appointment

(Hover over the above title and hit CTRL+Click to open the video training version of this document)

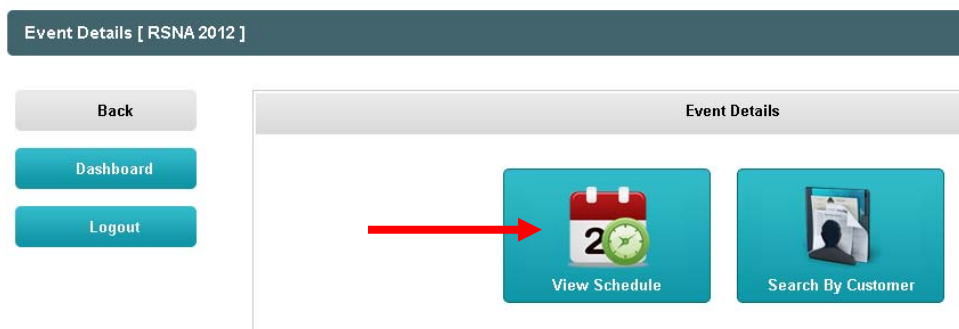
1. Log into the Online Demo Scheduling Tool (See instructions: “How to Log into the Online Demo Scheduling Tool”). User name = Carestream email address, Password = Global ID.
2. From dashboard click the '**Events**' icon to see details about the events.



3. From the 'Events List' screen, click the '**Goto**' arrow for the event you want to book an appointment for. Note that you will only see listed the events you have permissions to schedule for.

Duration	Events	Location	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	<b>RSNA 2012</b> RSNA Show Demo Stations	Chicago USA	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	<b>RSNA CONF RM</b> RSNA Conference Rooms Scheduling	Chicago USA	Goto	Edit

4. From the 'Events Dashboard' click the '**View Schedule**' icon to book a new appointment.



This will bring you to the calendar view of that event. From here you will want to:

- Select the date of the appointment you want to schedule at the top left of the calendar view.
- Then use the '**Select Station Filter**' from the left navigation to filter which station you are booking for (ex. 'Category' select HCIS, and then under '**Select Stations**' choose all Demo areas you wish to see the schedule for).
- Click '**Apply Filter**'. This will refresh your screen and only show the availability for what you the date you selected, and the items you identified in the 'Select Station Filter' and 'Select Station' areas.
- Similar to other calendaring tools you will **single click** on the time block you want to book. Note: Most demo appointments are scheduled in 15 min time slots due to the large volume of requests for these types of appointments.

The screenshot shows a web-based calendar interface. On the left, there is a sidebar with navigation links: 'Back', 'Dashboard', and 'Logout'. Below these is a 'Select Station Filter' section with checkboxes for 'Type', 'Category' (checked), 'HCIS' (checked), and 'Region'. Underneath is a 'Select Stations' list with checkboxes for various stations: '1A - RAD', '1B - RAD', '1D - RAD', '2B - RAD', '3A - Radiology, UK', '3C - RAD', and '3D - RAD'. A 'Show Schedule >>' button is at the bottom of this list. The main calendar area displays a grid for Sunday, November 25, 2012, with time slots from 08:00 am to 12:30 pm. The top of the calendar shows 'Showing Stations 1 to 6 of 28'. Annotations: 'a' points to the date selector 'today'; 'b' points to the 'Category' checkbox; 'c' points to the 'Show Schedule >>' button; and 'd' points to a time slot in the calendar grid.

5. Selecting the time slot in step 4.d automatically opens up the form that needs to be submitted to book the appointment.

The screenshot shows a two-column form for booking an appointment. The left column is titled 'Customer Details' and includes fields for Name, Search By (Last Name - First Name), Company, Title, Address, Zip/Postal Code, City, State, Country, Cell Phone, Work Phone, Sales Funnel Stage, and Email. There is a 'New Customer?' checkbox. The right column is titled 'Appointment Details' and includes fields for Start Date & Time (11/26/2012 9:00 AM), Duration (15 min.), End Date & Time (11/26/2012 9:15 AM), # of Customers Attending (0), Name of additional customers attending, Notes, Appointment Scheduled By (Karen Berwind), Schedule Status (Confirmed), Account Owner (John LaBella), Cell Phone, Email (john.labella@carestream), Station (1A - RAD), and Demo Person (Karen Berwind). At the bottom, there are buttons for 'Save', 'Cancel', and 'Preview/Edit Email'.

- a. Complete three areas (Customer Details, Appointment Details and Send Appointment Notification Email):

### 1. Customer Details

- If you are booking an appointment for a new customer, the **'New Customer'** check box is automatically selected and you will need to fill out the information for the new customer.
- If it is for an existing customer, use the **'Search By'** functionality to identify how you would like to search for the user ('Last Name – First Name' or 'First Name – Last Name').
- Once you have chosen how you will search for the customer go back to the **'Name'** field and type in the customer's name you want to find. The search tool is synced to SFDC and will populate the name as you type it.

**Customer Details**

Name

Search By

☒ New Customer?

Company

Title

Address

Zip/Postal Code

City

State

Country

Cell Phone

Work Phone

Email

Sales Funnel Stage

- Confirm the information and ensure you designate the **'Sales Funnel Stage'**.

### 2. Appointment Details

- Review and confirm the information stored in the 'Start Date & Time', 'Scheduled Status', 'Account Owner', 'Chaperone' and 'Station' sections for accuracy.
- If the customer is bringing additional customers, list out their names and email addresses in the box under the label **'Name of additional customers attending.'**
- If the 'Chaperone' is not identified and the account owner is not attending the event, complete this section.
- You can also additionally add notes for the demonstrator to review at the event to help frame their conversations with the attendees. Be aware that these are seen by the demonstrator and others.

**Appointment Details**

Start Date & Time

Duration

End Date & Time

# of Customers Attending

Name of additional customers attending

Notes, including customer insights for Demonstrator (key topics, hot buttons, etc.)

Appointment Scheduled By

Schedule Status

Account Owner

Name

Cell Phone

Email

Chaperone

Name

Cell Phone

Email

Station

Demo Station




Demo Person


### 3. **Send Appointment Email Notification**

- i. You can send an appointment confirmation email to the following people: Account Owner, Scheduled by Person, Customer, or any other email address typed into the field under the label 'Other E-mail' or 'Please specify'.

Select the check box next to the people you want the email to go to, or type in the email address in the field provided.

**Send Appointment E-mail Notification to**

☐ Account Owner  ☐ Scheduled by person  ☐ Customer 

Other E-mail, Please specify 

**Save** **Cancel** **Preview/Edit Email**

- ii. To preview the email, click the **'Preview/Edit Email'** button. The Preview/Edit window will appear.

**Carestream** A SMARTER WAY FORWARD.


**Confirmed Carestream Product Demo at RSNA 2013**

Jane Doe  
ABC Company  
123 Street Rd  
Rochester, NY  
United States

This email will confirm your appointment for a product demonstration at our exhibit booth during RSNA 2013

**Your demo station is:** Area 1 - RAD #A  
**Date of appointment:** 12/1/2013  
**Time:** 8:30 AM  
**Location:** Chicago USA

\_\_\_\_\_ will serve as your chaperone for the demo

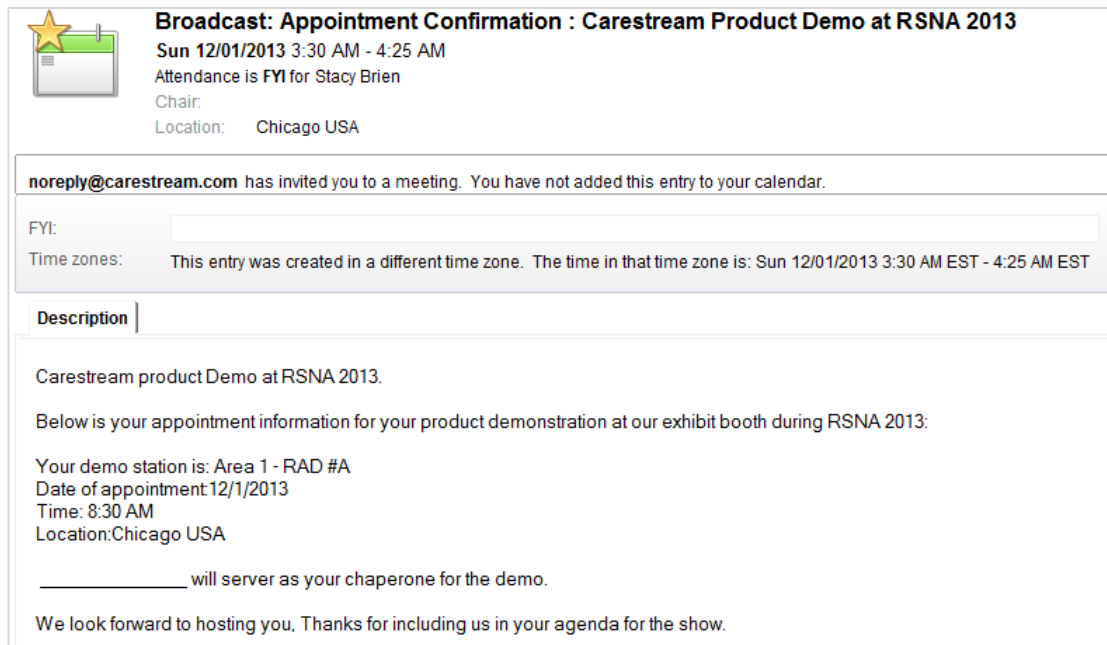
 [Add this event to my calendar](#)

**Done** **Cancel**

Stacy Brien

The email will auto-populate with information from the form completed in steps 5.a.1, 5.a.2 and 5.a.3.

The email will also auto-populate the “Add this event to my calendar” feature, allowing the user to easily add their appointment to their calendars. Below is what they will see when they click the link:



**Broadcast: Appointment Confirmation : Carestream Product Demo at RSNA 2013**  
**Sun 12/01/2013 3:30 AM - 4:25 AM**  
 Attendance is **FYI** for Stacy Brien  
 Chair:  
 Location: Chicago USA

**noreply@carestream.com** has invited you to a meeting. You have not added this entry to your calendar.

FYI:

Time zones: This entry was created in a different time zone. The time in that time zone is: Sun 12/01/2013 3:30 AM EST - 4:25 AM EST

**Description**

Carestream product Demo at RSNA 2013.


Below is your appointment information for your product demonstration at our exhibit booth during RSNA 2013:

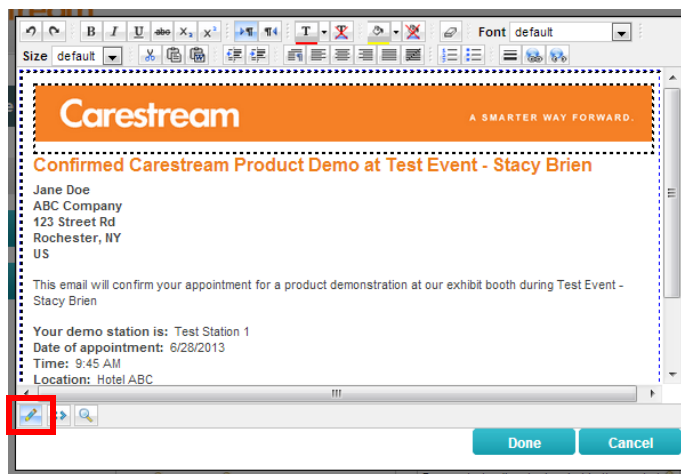
Your demo station is: Area 1 - RAD #A  
 Date of appointment: 12/1/2013  
 Time: 8:30 AM  
 Location: Chicago USA

\_\_\_\_\_ will server as your chaperone for the demo.

We look forward to hosting you. Thanks for including us in your agenda for the show.

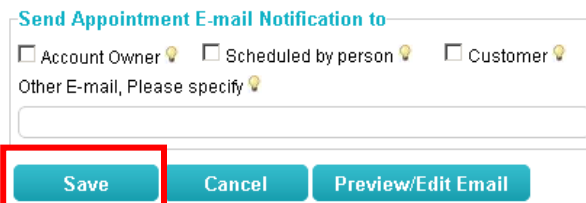
- iii. If you need to edit or change information in the email, select

**'Design Mode'** (  ) and edit as needed. Click **'Done'**.







The screenshot shows a web-based email design editor. At the top, there's a header with the Carestream logo and tagline "A SMARTER WAY FORWARD.". Below the header, the email content is displayed within a dashed border, indicating it's in design mode. The content includes a subject line "Confirmed Carestream Product Demo at Test Event - Stacy Brien", a recipient name "Jane Doe", company "ABC Company", address "123 Street Rd, Rochester, NY, US", and appointment details: "Your demo station is: Test Station 1", "Date of appointment: 6/28/2013", "Time: 9:45 AM", and "Location: Hotel ABC". At the bottom of the editor, there are "Done" and "Cancel" buttons. A red box highlights the "Design Mode" icon (a pencil) in the bottom left corner of the editor.

- iv. After you are done reviewing and editing the email, click **Save**. The email will be sent and the appointment will be booked. Note: the email is sent from a generic Carestream address.



**Send Appointment E-mail Notification to**

☐ Account Owner  ☐ Scheduled by person  ☐ Customer 

Other E-mail, Please specify 

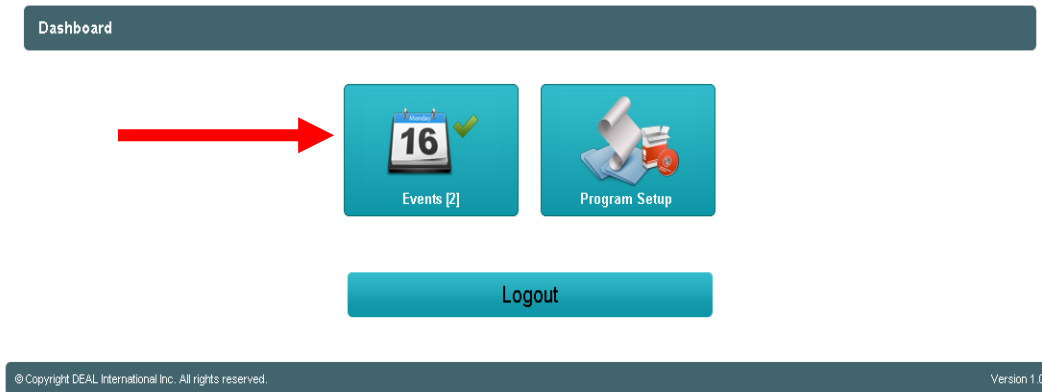
**Save** **Cancel** **Preview/Edit Email**

- b. To confirm appointment was booked, repeat **Step 4**.

## How to Cancel a Demo Appointment

(Hover over the above title and hit CTRL+Click to open the video training version of this document)

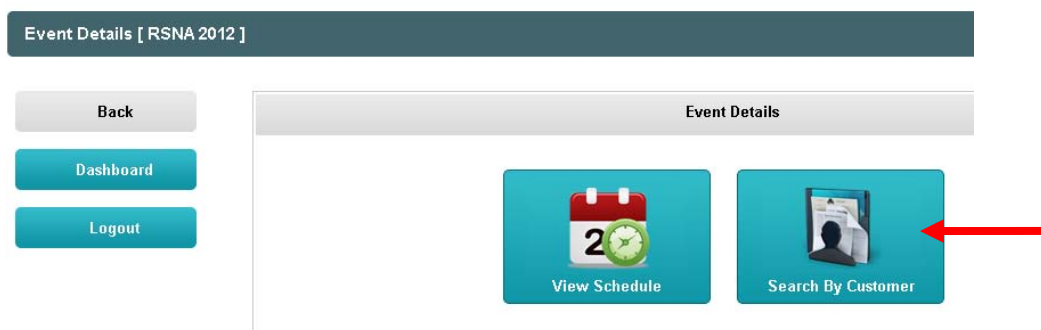
1. Log into the Online Demo Scheduling Tool (See instructions: "How to Log into the Online Demo Scheduling Tool"). User name = Carestream email address, Password = Global ID.
2. From dashboard click the '**Events**' icon to see details about the events.



3. From the 'Events List' screen, click the '**Goto**' arrow for the event in which the appointment is in that you wish to cancel. Note that you will only see listed the events you have permissions to schedule for.

Duration	Events	Location	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	RSNA 2012 RSNA Show Demo Stations	Chicago USA	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	RSNA CONF RM RSNA Conference Rooms Scheduling	Chicago USA	Goto	Edit

4. From the 'Events Dashboard' click the '**Search By Customer**' icon to locate the appointment you want to cancel.





5. The **'Search By Customer'** screen now displays.

**Carestream**

Welcome: Stacy Brien    Date: 03 September 2013    Time: 1:27:33 PM

**Search By Customer [ RSNA 2012 ]**

Back    Dashboard    Logout

**Search**

Search By: All    Search What ?

Search    View

**Customers**

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- a. Select the method in which you want to search by from the **'Search By'** drop down, and then type in the search criteria in the **'Search What?'** field. Click the **"Search"** button to run your search.

**Search By Customer [ RSNA 2012 ]**

Back    Dashboard    Logout

**Search**

Search By: All    Search What ?

Search    View

**Custom**

- b. You will now see a list of all customers that meet your search criteria. Now click the **'View/Edit Schedule'** ( ) button.

**Search By Customer [ RSNA 2012 ]**

Back    Dashboard    Logout


**Search**

Search By: First Name    Search What ? Stacy

Search    View

**Customers**

First Name	Last Name	Station Name	Start Date/Time	End Date/Time	City	View/Edit Schedules
Stacy	Goergen	1D - RAD	11/25/2012 12:00:00 PM	11/25/2012 12:30:00 PM	Clayton	

- c. You are now shown the calendar view for the date in which the appointment you want to cancel is booked. The appointment you searched for will be shown in Dark Blue.
- d. Locate the appointment from the list and hover over the box until you see the red x appear in the upper right corner. **Click the red X** (  ).
- e. A prompt will appear asking you to confirm that you want to delete the event. Click '**OK**'.

**Schedule [ RSNA 2012 ]**

**Back** **Dashboard** **Logout**

**Select Station Filter:**

- Type
- Category
- Region

**Select Stations:**

- ☐ Name
- ☐ 2A - Cloud Presentation
- ☐ 1A - RAD
- ☐ 1B - RAD
- ☐ 1C - RAD, Hornback Demo
- ☐ 1E - Vue Connect Presentation

**Apply Filter >>**

**Important!**

- \* Single click on a time slot to schedule an appointment: A screen will appear for you to fill in. Doing so should be intuitive.
- \* The customer's name will appear in a time slot once an appointment is scheduled. Right click for a "quick view" of the customer's detail(hospital, address, phone number if available etc.)

**Showing Stations 1 to 1 of 1**

**today Sunday, November 25, 2012**

**1D - RAD [ TBA TBA ]**

Time	Appointment
08:00 am	
08:15 am	
08:30 am	
08:45 am	
09:00 am	
09:15 am	
09:30 am	
09:45 am	
10:00 am	
10:15 am	
10:30 am	
10:45 am	
11:00 am	
11:15 am	
11:30 am	
11:45 am	
12:00 PM	Stacy Goergen
12:15 PM	

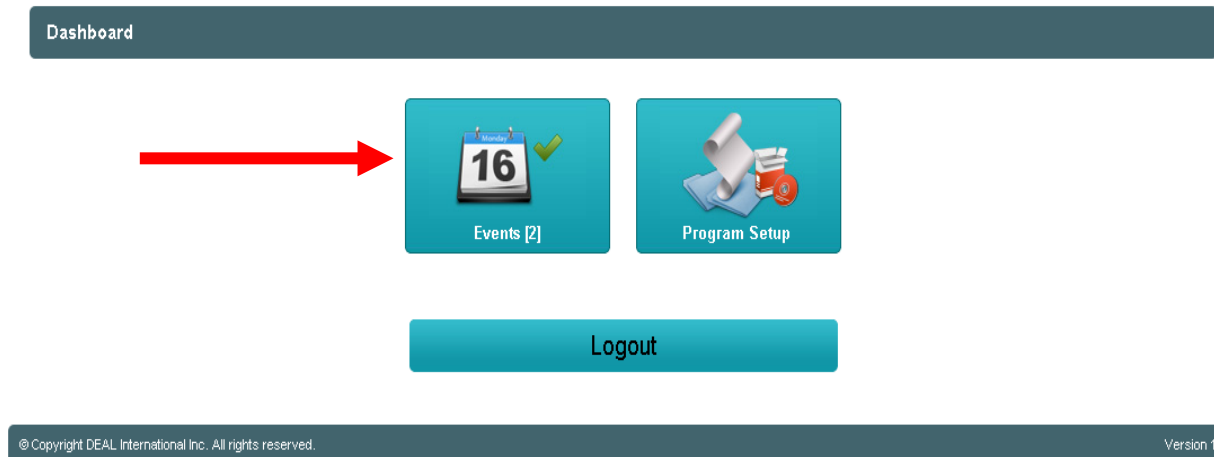
A red box highlights the appointment for Stacy Goergen at 12:00 PM, and a red arrow points to the red X icon in the upper right corner of the appointment box.

- f. Once you confirm, the appointment is removed from the calendar view and deleted.

## How to Pull a List of Appointments

(Hover over the above title and hit CTRL+Click to open the video training version of this document)

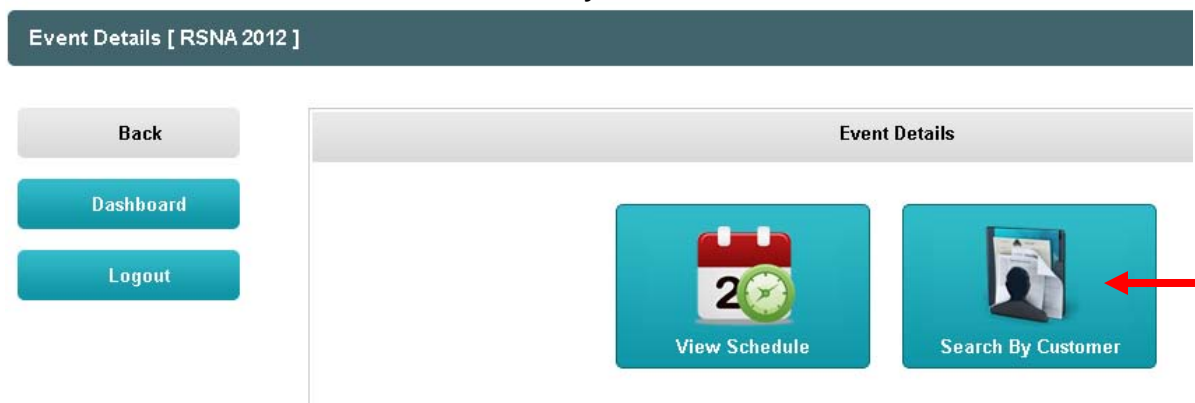
1. Log into the Online Demo Scheduling Tool (See instructions: "How to Log into the Online Demo Scheduling Tool"). User name = Carestream email address, Password = Global ID.
2. From dashboard click the '**Events**' icon to see details about the events.



3. From the 'Events List' screen, click the '**Goto**' arrow for the event in which you want to pull a list of appointments from. Note that you will only see listed the events you have permissions to schedule for.

Duration	Events	Location	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	<b>RSNA 2012</b> RSNA Show Demo Stations	Chicago USA	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	<b>RSNA CONF RM</b> RSNA Conference Rooms Scheduling	Chicago USA	Goto	Edit

4. From the 'Events Dashboard' click the '**Search By Customer**' icon



- Under **'Search By'** select the method in which you want to search for appointments by. For this example we will use **'Scheduled by'**. Enter the name into the **"Search What?"** field, and click the **'Search'** button. A list of all appointments that were scheduled by the person identified in the 'Search What?' field will now appear.

**Search By Customer [ Test Event - Stacy Brien ]**

Back

Dashboard

Logout





Search

Search By Scheduled By

Search What ? Stacy Brien

SearchView

Customers

First Name	Last Name	Station Name	Start Date/Time	End Date/Time	City	View/Edit Schedules
Stacy	Brien	Test Station 1	6/28/2013 10:30:00 AM	6/28/2013 10:45:00 AM	Rochester	 2
Test		Test Station 1	6/28/2013 9:45:00 AM	6/28/2013 10:00:00 AM	test	 2
Test		Test Station 1	6/28/2013 9:45:00 AM	6/28/2013 10:00:00 AM	test	 2
Test		Test Station 1	6/28/2013 9:45:00 AM	6/28/2013 10:00:00 AM	test	 2

6. Above the list, next to the 'Search' button, you will find the '**View**' button. Click '**View**'
7. This will bring up a print friendly view of the list that you can easily send to your printer. You can also export the list by clicking the '**Export All**' button.

### Customer Appointment Details [ Test Event - Stacy Brien ]

Back

Dashboard

Logout

Print

Export All

Find...

1 of 1

75%

SAP CRYSTAL REPORTS

Main Report

Carestream

Customer Schedule Details

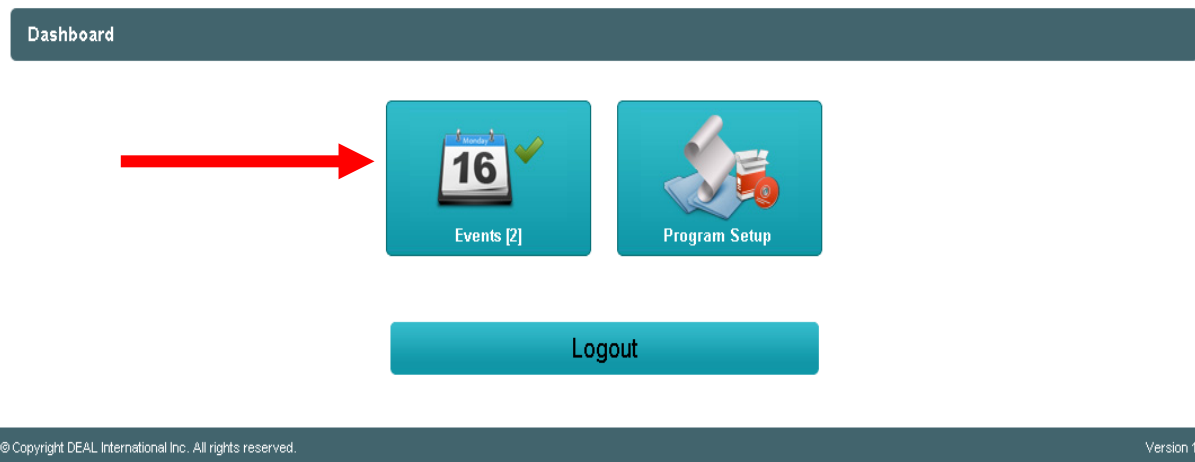
9/3/2013

First Name	Last Name	Station Name	City	Start Date/Time	End Date/Time
Stacy	Brien	Test Station 1	Rochester	6/28/2013 10:30:00AM	6/28/2013 10:45:00AM
Test		Test Station 1	test	6/28/2013 9:45:00AM	6/28/2013 10:00:00AM
Test		Test Station 1	test	6/28/2013 9:45:00AM	6/28/2013 10:00:00AM
Test		Test Station 1	test	6/28/2013 9:45:00AM	6/28/2013 10:00:00AM

## For Administrators and Event Managers: How to Download Data from the Demo Scheduling System

(Hover over the above title and hit CTRL+Click to open the video training version of this document)

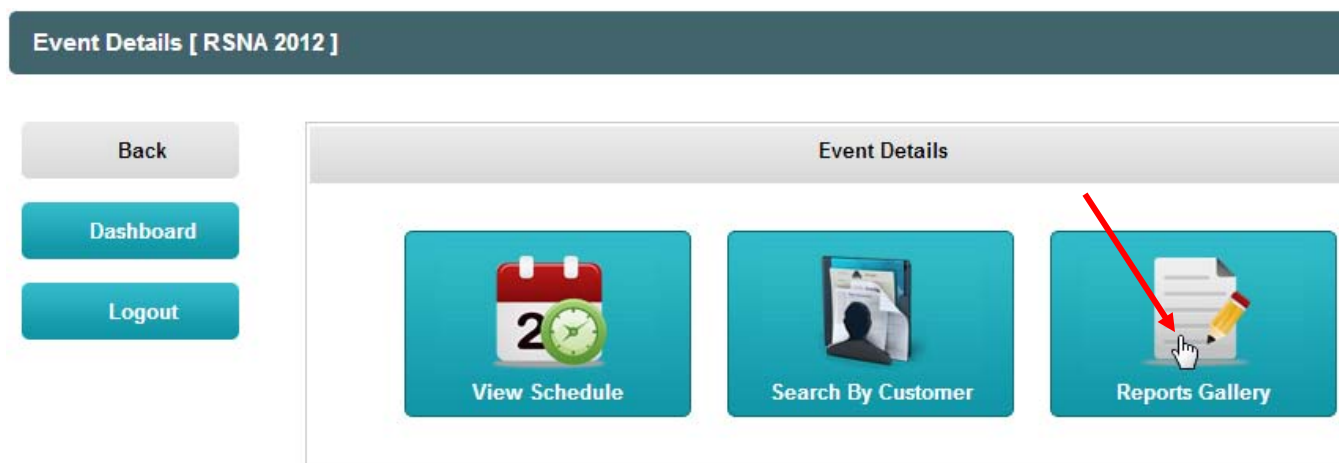
1. Log into the Online Demo Scheduling Tool (See instructions: “How to Log into the Online Demo Scheduling Tool”). User name = Carestream email address, Password = Global ID.
2. From dashboard click the '**Events**' icon to see details about the events.



3. From the 'Events List' screen, click the '**Goto**' arrow for the event in which you want to download data from. Note that you will only see listed the events you have permissions to schedule for.

Duration	Events	Location	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	RSNA 2012 RSNA Show Demo Stations	Chicago USA	Goto	Edit
25 Nov, 2012 - 29 Nov, 2012	RSNA CONF RM RSNA Conference Rooms Scheduling	Chicago USA	Goto	Edit

4. From the Events Details screen select the 'Reports Gallery' button.



5. In the Reports Gallery section set the 'Filter Appointments By' field to 'Customize Data'.
6. Click the 'View' button, and when the pop up appears click 'Okay'. This will download and open the data in Excel.

### Reports Gallery [ RSNA 2012 ]

Back

Reports Gallery

Filter Appointments By: Customize Data

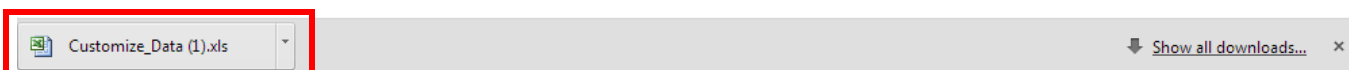
View

Dashboard

Logout

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Version 1.0

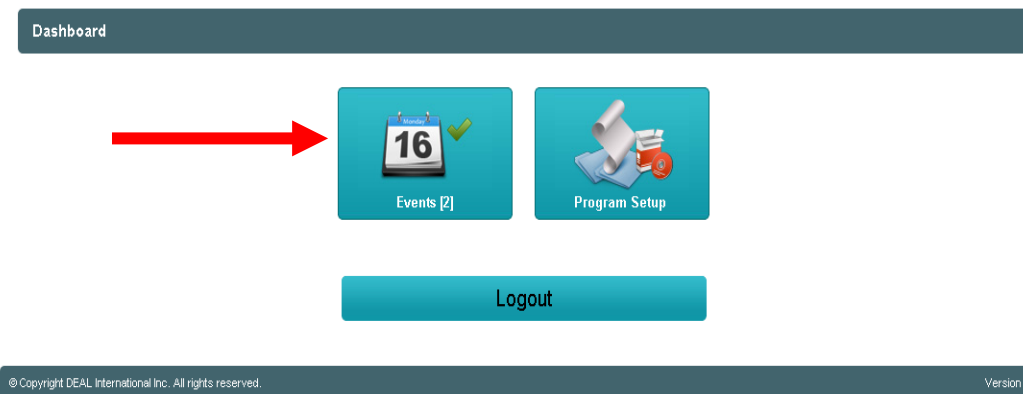


7. When Excel loads it will display all the data for that tradeshow.
8. Once in Excel you can organize the data in many fashions by applying the 'Filter' tool to the worksheet.
  - a. To apply this functionality navigate to the 'Data' tab and click on the 'Filter' icon.
  - b. Now, if for example, you want to sort the worksheet by the 'Account Owner' you can click the on the arrow next to the 'Account Owner' title in row A and select 'Sort from A to Z'. This arranges the worksheet by account owner in alphabetical order.

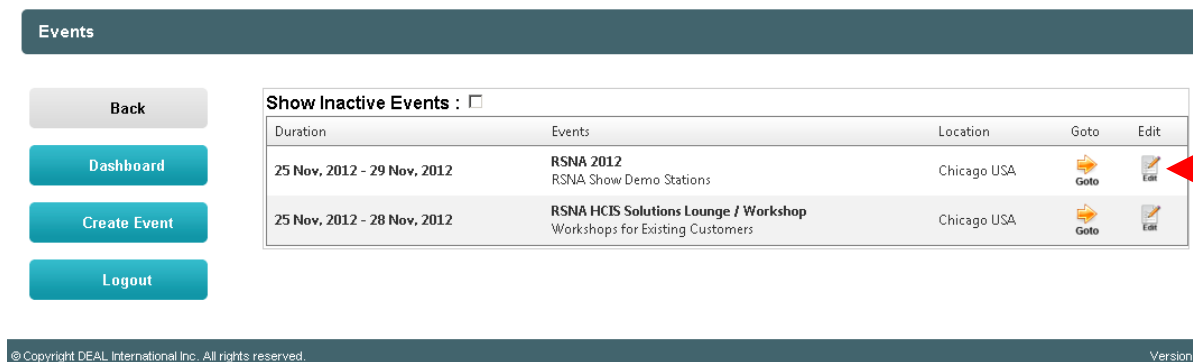
Customize_Data (1).xls [Compatibility Mode] - Microsoft Excel																				
<div> <div>HomeInsertPage LayoutFormulasDataReviewViewAcrobat</div> <div> <div> <div>From Access</div> <div>From Web</div> <div>From Text</div> </div> <div> <div>From Other Sources</div> <div>Existing Connections</div> </div> <div>Get External Data</div> </div> <div> <div>Connections</div> <div>Refresh All</div> <div>Properties</div> <div>Edit Links</div> <div>Connections</div> </div> <div> <div>Sort &amp; Filter</div> <div>Sort</div> <div>Filter</div> <div>Advanced</div> </div> <div> <div>Data Validation</div> <div>Consolidate</div> <div>What-If Analysis</div> </div> <div> <div>Group</div> <div>Ungroup</div> <div>Subtotal</div> </div> <div> <div>Text to Columns</div> <div>Remove Duplicates</div> <div>Data Tools</div> </div> <div> <div>Clear</div> <div>Reapply</div> <div>Outline</div> </div> </div>																				
<div> <div>A1</div> <div>Company</div> </div>																				
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Com	Title	Cust	Addr	City	State	Coun	Regi	Funn	Dem	Busi	Cust	Start	Time	Dura	Dem	Chap	Appc	Accd	Accd
2	DIA TEC	Director Miguel I	Paragu	Capital	Buenos	AR	LAR	1-Qualif	1E - Vu	HCIS	OLD	11/25/21	10:00:01	15 minu	RMNPACS	and	Confirm	luciano. luciano		
3	St. Mar	Adminis	Patti Na	1300 M	Troy	NY	US	USC	1-Qualif	2C - Ca	HCIS	OLD	11/25/21	10:00:01	15 minute(s)			Confirm	david.cl	DAVID (J
4	MIT		na	na	na	na	us	na	1-Qualif	1C - RA	HCIS	NEW	11/29/21	1:00:00	60 minute(s)		Bob Ma	Confirm	bob.mai	Bob Ma (
5	St. Ros	Dr.	weiser	na	na	NV	us	na	1-Qualif	RAD Pr	HCIS	NEW	11/28/21	3:00:00	15 minute(s)			Confirm	stuart.vi	STUAR
6	Radiolo	Dr.	Kraush	na	na	na	CA		1-Qualif	1B - RA	HCIS	NEW	11/28/21	3:00:00	30 minute(s)			Confirm	randy.rc	Randy F
7	NM Medical		Rahil S	na	INDIA		INDIA		1-Qualif	RAD Pr	HCIS	NEW	11/28/21	3:15:00	45 minute(s)			Confirm	marylou	Marylou M
8	na	Dr.	Dr. And	na	na	NJ	US		1-Qualif	2B - RA	HCIS	NEW	11/28/21	1:00:00	30 minu	Customer stopp	Confirm	joseph.i	JOSEPI	
9	Rome I	Director	Sharon	1500 N	Rome	NY	us	USC	1-Qualif	3C - RA	HCIS	OLD	11/28/21	10:30:01	30 minute(s)			Confirm	david.cl	DAVID (C
10	United I	Preside	Nasser	1762 W	Los Ang	CA	US	USC	1-Qualif	2D - RA	HCIS	OLD	11/28/21	11:30:01	30 minute(s)			Confirm	valerie.r	VALERI
11	Kaiser F	Director	John Ec	4460 H	Pleasant	CA	US	USC	1-Qualif	RAD Pr	HCIS	OLD	11/28/21	12:30:01	30 minute(s)			Confirm	robert.a	Robert /
12	Tufts	Dr.	Ward	na	na	na	us	na	1-Qualif	1C - RA	HCIS	NEW	11/28/21	2:00:00	30 minute(s)			Confirm	michael	Michael C
13	Albert Grabb		Albert C	NA	NA		USA		1-Qualif	RAD Pr	HCIS	NEW	11/28/21	2:00:00	60 minute(s)			Confirm	marylou	Marylou M
14	Brisban	Chief H	John M	LVL 6 &	BRISBA	QLD	AU	Asia	1-Qualif	1D - RA	HCIS	NEW	11/29/21	10:00:01	60 minute(s)		Heather	Confirm	daniel.d	Daniel D
15	na	na	Jack B	na	na	na	Africa	na	1-Qualif	4A - DR	X-Ray	SNEW	11/28/21	4:30:00	30 minu	Requested by V	Confirm	cathleer	Cathy E	
16	na	na	Jack B	na	na	na	Africa	na	1-Qualif	10 - DR	X-Ray	SNEW	11/28/21	4:00:00	15 minu	Wayne Elliot CS	Confirm	cathleer	Cathy E	
17	na	na	Danielle	na	na	na	CA	na	1-Qualif	3D - RA	HCIS	NEW	11/27/21	2:30:00	30 minute(s)			Confirm	randy.rc	Randy F
18	na	na	Minday	na	na	na	na		1-Qualif	3C - RA	HCIS	NEW	11/27/21	2:30:00	30 minu	Dr. Walk in appt	Confirm	cathleer	Cathy E	
19	Preferred Imagin		Rollen	NA	NA		USA		1-Qualif	1C - RA	HCIS	NEW	11/29/21	12:30:01	15 minute(s)			Confirm	marylou	Marylou M
20	Wellspan		Ron Be	NA	York	PA	USA		1-Qualif	RAD Pr	HCIS	NEW	11/28/21	1:00:00	60 minute(s)			Confirmed		504717M
21	na		Dr. Lin	na	na	na	na		1-Qualif	1B - RA	HCIS	NEW	11/28/21	12:00:01	30 minute(s)			Confirm	robert.a	Robert /
22	na		EJ Solis	na	na	na	na	na	1-Qualif	3D - RA	HCIS	NEW	11/27/21	3:00:00	30 minute(s)			Confirm	john.rad	JOHN R
23	Premier Radiolo		Mr. Rob	620 Cro	Tupelo	MS	US		1-Qualif	1A - RA	HCIS	NEW	11/27/21	11:45:01	15 minute(s)			Confirm	anne.mi	ANNE M
24	Tokyo University		Masaak	7-3-1 H	TOKYO	Tokyo	Japan	Japan	1-Qualif	1A - RA	HCIS	NEW	11/29/21	12:15:01	105 minute(s)		Shinichi	Confirm	kenji.tar	KENJI T
25	Epworth Executi		Allan B	89 Bridg	Richmo	VIC	AU	ASIA	1-Qualif	1D - RA	HCIS	NEW	11/27/21	11:00:01	60 minute(s)		Heather	Confirm	terry.za	TERRY D
26	John Hu IT		Garvin V	CNR LA	BROAD	NSW	AU	ASIA	1-Qualif	1D - RA	HCIS	NEW	11/29/21	12:00:01	90 minute(s)		Heather	Confirm	frank.ab	Frank A
27	Aucklar Managir		Steve W	P.O. Box	Newmarket		NZ		1-Qualif	5B - DR	X-Ray	SNEW	11/28/21	2:00:00	30 minu	Carestre	Rob Wil	Confirm	kay.stol	KAY ST

## For Administrators and Event Managers: How to Set up Event Team Members

1. Log into the Online Demo Scheduling Tool (See instructions: “How to Log into the Online Demo Scheduling Tool”). User name = Carestream email address, Password = Global ID.
2. Click the ‘**Events**’ button on the dashboard to set up team members for an event.
  - “Team members” constitute all people that will need to use the scheduling system to book demo appointments for a particular trade show.
  - At any time, you can click on the “Back” button, to go to the previous screen, or you can click on “Dashboard” to take you back to the Event screen.



3. After clicking on the “Events” button, you will be taken to the screen below. Find the Event name you need to access and click on the “**Edit**” button.



4. You are now taken to the Event Setup Screen (shown below) that displays details of your event. Click on the “**Save General Information and Setup Event Team**” button on the bottom right.

**Event Setup [RSNA 2012]**

**General Information**

Name of event \*  Detailed Description

Active ☒

Description \*  Location \*

Zip  City  ST

Address

Country

Start Date \*  End Date \*

Scheduling Date \*  Time Zone  #Demo Station

**Save General Information and Setup Event Team >>**

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5. You are now in the “**Event Team Members**” section. Here, you will add the appropriate people to your event as team members. **However, before you do so you first need to decide on what “permission levels” you want to give the various members of the team.**

Event Setup [ RSNA 2012 ]

Back

Dashboard

Logout

Event Team Members

Select Role : Event Manager

All Team Members Selected Team Members

<input type="checkbox"/>	Name	City	Zip	State	Country	Region	Department
<input type="checkbox"/>	50471736					MED US&C	Sales
<input type="checkbox"/>	cloud9					MED US&C	Vendor
<input type="checkbox"/>	ConcentrioIntegrator					MED US&C	Partner
<input type="checkbox"/>	COS Reporting User		14560-0944	NY	US	MED US&C	COS
<input type="checkbox"/>	diana.dsa					MED US&C	Sales
<input type="checkbox"/>	Hubspot					MED US&C	Marketing
<input type="checkbox"/>	ipadtest					MED US&C	Sales
<input type="checkbox"/>	Model Metrics					MED US&C	Sales

Page: 1 of 79 Go Page size: 20 Change Item 1 to 20 of 1564

Add User to Selected Team List

Print Selected Members << General Information Setup Demo Station >>

**Follow these steps to add event team members:**

- a) When granting permission, first click on the ‘**All Team Members**’ button (blue arrow below); then click on the down arrow (circled in red) in the ‘**Select Role**’ field. This will expose the names of the different permission types (shown adjacent to “dotted” black arrow): Event Manager, Scheduler, Sales Person, Demo Person. Select the permission you want to grant. Permission Level definitions are shown below.

Select Role : Event Manager

All Team Members Selected Team Members

espinosa

NoFilter

Upside

Validar

WasBrianMelrose

Contains

DoesNotContain

StartsWith

EndsWith

Event Manager

Event Manager

Scheduler

Sales Person


Demo Person

**Permission Levels:**

- **Administrator** – Has the rights to create new events, grant permission levels, and add new people that are not in the ‘Universe’. The ‘Universe’ is defined as those employees and names that are preloaded into the system from Salesforce.com. If you cannot find a name in the system, you will need to add that person as a new user to the Universe.
- **Event Manager** – Can essentially do everything Administrators can, except create new events.
- **Scheduler** – Can schedule demo stations for themselves and other people.
- **Demo Person** – Can schedule demonstrations for them only.
- **Sales Person** – Can schedule demo stations for themselves and view information.
- **Basic Login** – When a user is originally added into the system they are defaulted to ‘Basic Login’. This role provides ‘View only’ access to the user. They cannot add, delete, or edit any information within the system.



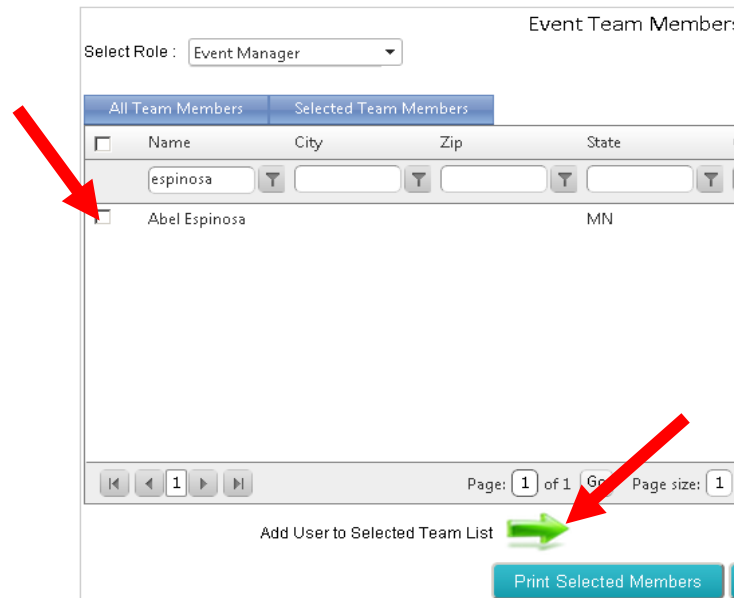
**b) Granting Permission to One or a Few People:**

- In the name field, type in part of the first or last name of the person you wish to search for.
- Then select the Filter icon (  ) and select “contains” to perform the search, shown in step a above.

If the person is in the system, you will see him/her listed (see illustration below).

Click on the white check box adjacent to the person's name to select the person. Then click on the Green Arrow which says 'Add user to Selected Team List' (  ).

You will see that person's name disappear from the window below. **This means they have been added to your event at the permission level you selected.**

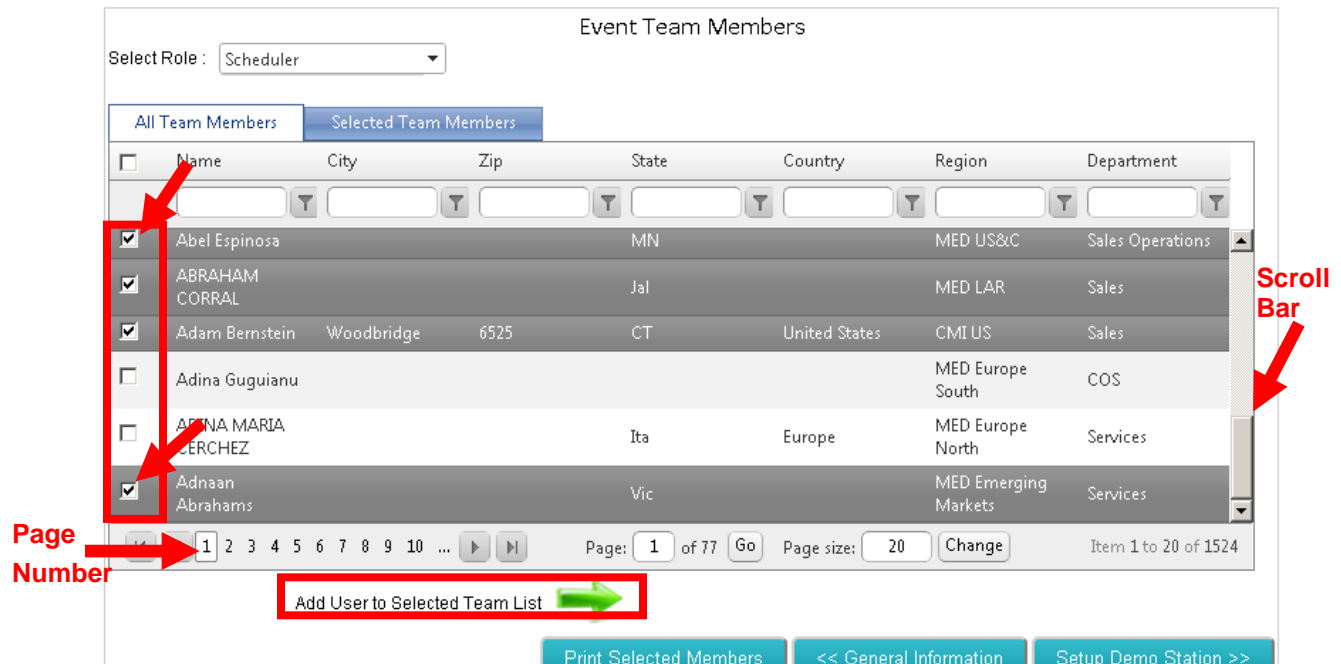


The screenshot shows the 'Event Team Members' window. At the top, 'Select Role' is set to 'Event Manager'. Below are two tabs: 'All Team Members' and 'Selected Team Members'. A search bar contains 'espinosa' with a filter icon. Below the search bar, a table lists team members. The first entry is 'Abel Espinosa' with a white check box to its left. At the bottom, there is a green arrow button labeled 'Add User to Selected Team List' and a blue button labeled 'Print Selected Members'.

**c. Granting Permission Level to Many People:**

This can be done by clicking on the white check box before each name you want to assign that role to. The person's name will be highlighted in gray when selected. This process needs to be done for each page. Make sure you scroll from top to bottom on each page.

Once all the individuals are selected for that role, click on the green arrow next to the content 'Add User to Selected Team List'. The people marked are removed from the 'All Team Members' list and added to the permission level list you selected. Repeat the steps above on each page until you are done.



The screenshot shows the 'Event Team Members' window with 'Select Role' set to 'Scheduler'. The 'All Team Members' tab is active. A table lists team members with columns: Name, City, Zip, State, Country, Region, and Department. Several rows are highlighted in gray, and their corresponding check boxes are checked. At the bottom, there is a green arrow button labeled 'Add User to Selected Team List' and a blue button labeled 'Print Selected Members'. A red box highlights the 'Add User to Selected Team List' button. A red arrow points to the 'Page Number' field, which shows '1' of 77. A red arrow points to the 'Scroll Bar' on the right side of the table.

**d. Confirm Permission Levels:**

If you want to confirm who has a certain level of permission, you can select the permission level and then click on the '**Selected Team Members**' tab.

If there is more than one page, you will need to review each page to see who is listed. All names are listed alphabetically.

Event Setup [ RSNA 2012 ]

Back

Dashboard

Logout

Event Team Members

Select Role: Event Manager

Permission Level

Selected Team Members

<input type="checkbox"/>	Name	City	Zip	State	Country	Region	Department
<input type="checkbox"/>	50471736					MED US&C	Sales
<input type="checkbox"/>	cloud9					MED US&C	Vendor
<input type="checkbox"/>	ConcentriidIntegrat					MED US&C	Partner
<input type="checkbox"/>	COS Reporting User		14560-0944	NY	US	MED US&C	COS
<input type="checkbox"/>	diana.dsa					MED US&C	Sales
<input type="checkbox"/>	Hubspot					MED US&C	Marketing
<input type="checkbox"/>	ipadtest					MED US&C	Sales
<input type="checkbox"/>	Model Metrics					MED US&C	Sales

Page: 1 of 79 Go Page size: 20 Change Item 1 to 20 of 1564

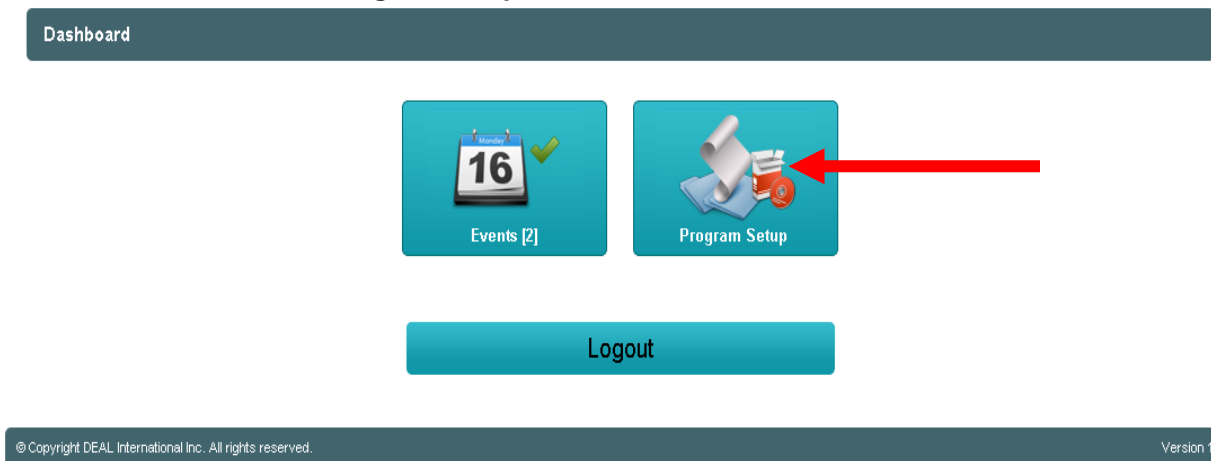
Add User to Selected Team List

Print Selected Members << General Information Setup Demo Station >>

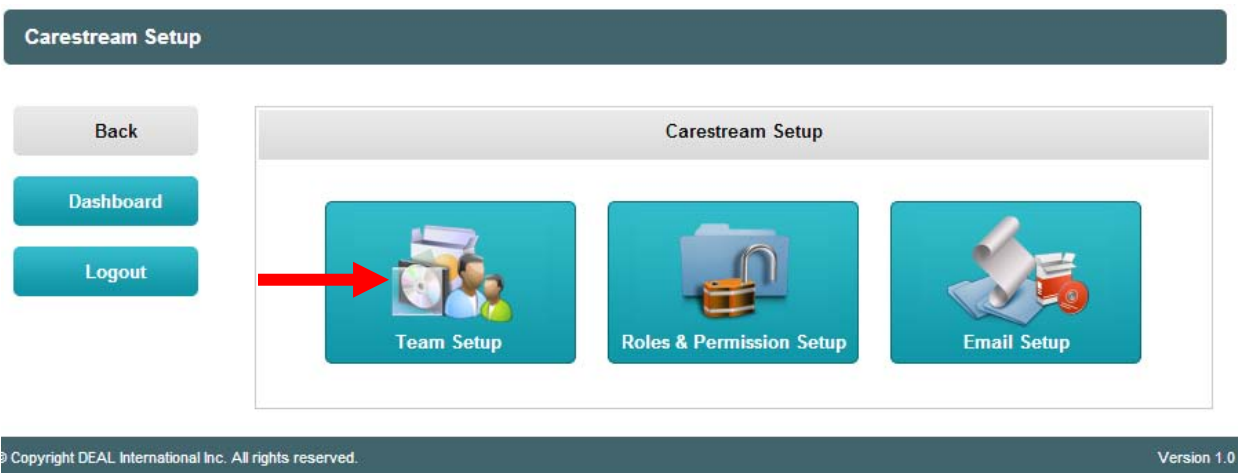
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## For Administrators: How to Add a User to the Universe

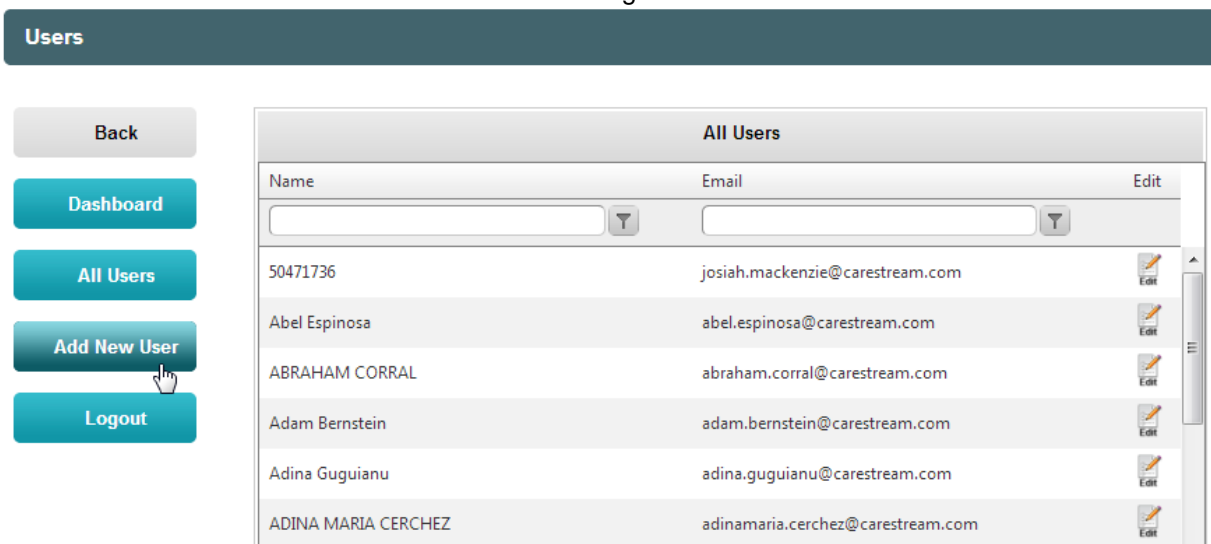
1. Log into the Online Demo Scheduling Tool (See instructions: "How to Log into the Online Demo Scheduling Tool"). User name = Carestream email address, Password = Global ID.
2. From dashboard click the **Program Setup** icon.



3. From the Carestream Setup section, select the **Team Setup** icon.



4. The **'Users'** section shows you all the users in the Carestream Universe. To add a user to the universe, select the **'Add New User'** button from the left navigation.



5. Fill in all the appropriate information on the '**Add/Edit User**' form.

Users

[Back](#)
[Dashboard](#)
[All Users](#)
[Add New User](#)
[Logout](#)

Add/Edit User

First Name *	Last Name *	Screen Name *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Address Line1	Address Line2	E-mail Address *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Zip/Postal Code	City	State/Province
<input type="text"/>	<input type="text"/>	<input type="text"/>
Region	Department	
<input type="text"/>	<input type="text"/>	
Country *	Cell Phone	User Role *
<input type="text"/>	<input type="text"/>	Admin <span style="float: right;">▼</span>
Password *	Confirm Password *	IsActive <input type="checkbox"/>
<input type="text"/>	<input type="text"/>	
Contract Details		
<div style="border: 1px solid #ccc; height: 30px;"></div>		
		<a href="#" style="background-color: #00728f; color: white; padding: 5px 10px; border: 1px solid #ccc;">Add</a> <a href="#" style="background-color: #ccc; padding: 5px 10px; border: 1px solid #ccc;">Cancel</a>

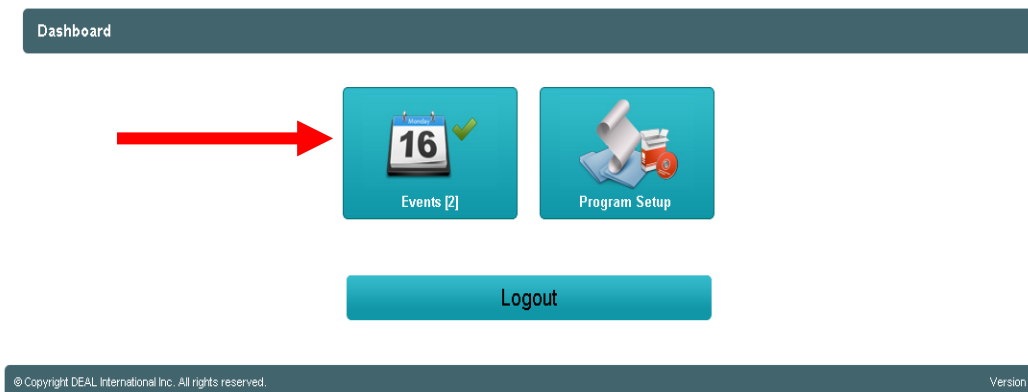
The following fields are **required**:

- a. First Name
- b. Last Name
- c. Screen Name (First Name + Last Name, Title Case)
- d. Email Address
- e. Country
- f. User Role – All Users are added in as 'Basic Login' unless identified otherwise
- g. Password – we use our Global IDs as passwords
- h. Confirm Password – we use our Global IDs as passwords

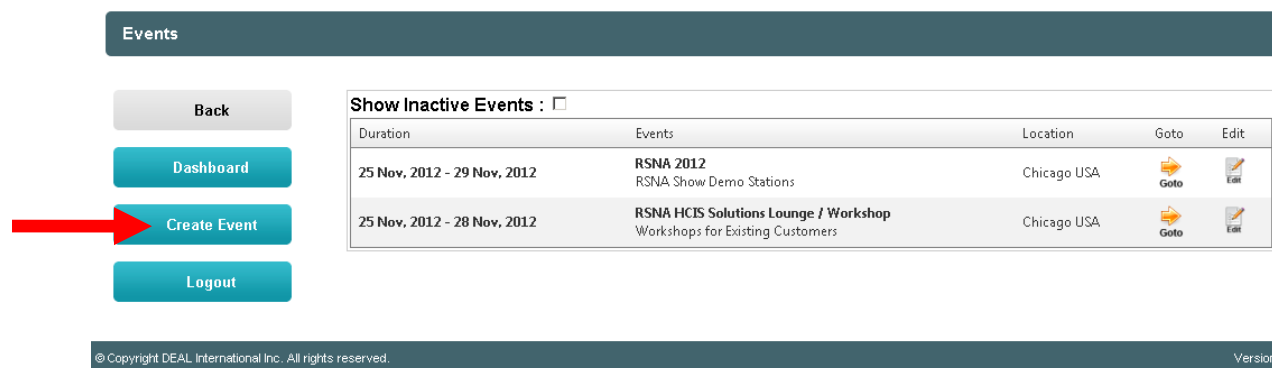
6. When you are done, click '**Add**'. The user has now been added to the Universe.

## For Administrators: How to Create an Event

1. Log into the Online Demo Scheduling Tool (See instructions: “How to Log into the Online Demo Scheduling Tool”). User name = Carestream email address, Password = Global ID.
2. Click the ‘Events’ button on the dashboard. At any time, you can click on the “Back” button, to go to the previous screen, or you can click on “Dashboard” to take you back to the Event screen.



3. From the left navigation choose the ‘Create Event’ button.



4. You are first taken to the ‘General Information’ section. Please complete all required fields and all additional fields to the best of your ability. Refer to screen shot on next page.
  - a. **Name of Event – Required.** Enter the name of the event you are creating (i.e. Arab Health 2013 or RSNA 2013). Keep it simple.
  - b. **Active** – Check this box if you want the event to be visible. If the event is in the future, leave this unchecked until you want to make it visible in the system.
  - c. **Description – Required.** Enter a description of the event. This appears under the event title in the main listing of events.
  - d. **Detailed Description** – Enter any additional details for this event here.
  - e. **Location – Required.** Enter the location of where the event is being held. (i.e. Chicago, IL or Palais des Congrès, Paris, France)
  - f. **Start Date – Required.** Enter the date in which the event begins.
  - g. **End Date – Required.** Enter the date in which the event ends.
  - h. **Scheduled Start Date – Required.** Enter the date in which you would like users to be able to begin scheduling appointments. This date would occur before the event Start Date.

- i. **#Demo Station** – This field is for information only. It counts the total number of demo stations that are created for the event.

### Event Setup [ New Event ]

[Back](#)

[Dashboard](#)

[Logout](#)

#### General Information

**a** Name of event \*

**b** Active ☐

**c** Description \*

Zip  City  ST

Address

Country

**d** Detailed Description

**e** Location \*

**f** Start Date \*  **g** End Date \*  **h** Scheduling Start Date \*

Time Zone   
 (GMT-05:00) Eastern Time (US & Canada) ▼

**i** #Demo Station

[Save General Information and Setup Event Team >>](#)

5. Once the general information is completed click the 'Save **General Information and Setup Event Team >>**' button.
6. You are now taken to the '**Event Team Members**' section.
  - a. Find the people who will be assigned to this event by first selecting the role in which you want to assign from the '**Select Role**' drop down. Once the page reloads, select the names of the individuals in the list you want to assign that role to by clicking the check box to the left of their name.
  - b. After you have checked the box of the individuals, click the green arrow ( ) that says '**Add User to Selected Team List**'.
  - c. Review the individuals you have added to the role identified from the 'Select Role' drop down by clicking on the '**Selected Team Members**' tab. If you added someone by mistake select the check box next to their name and click the green arrow that says "**Move to All Team Member List**".

From here you can also print a copy of the selected members by clicking the '**Print Selected Members**' button at the bottom.

[Back](#)

[Dashboard](#)

[Logout](#)

#### Event Team Members

Use this section to define the appropriate users to your event. You will need to define what user role you will grant each person. Begin by selecting the user role from the 'Select Role' drop down field in which you want to assign users to. Next select the 'All Team Members' tab and search for the user(s) you want to assign that role to. When you select the user(s) click the green arrow to assign them the role identified in the 'Select Role' drop down. These users will now appear under the 'Selected Team Members' tab for the identified role. Click 'Setup Demo Station' when you are done assigning the user roles for the event.

**a** Select Role :

**C – tab name hidden by drop down**

Name	Zip	State	Country	Region	Department
<input type="checkbox"/> User	Unlimited	Access		MED US&C	Sales Operations
<input type="checkbox"/> Johan Zoli			France		
<input type="checkbox"/> Abel Espinosa		MN		MED US&C	Sales Operations
<input type="checkbox"/> ABRAHAM CORRAL		Jal		MED LAR	Sales
<input type="checkbox"/> Adam Bernstein	Woodbridge	6525	CT	United States	CMI US Sales

**b** Add User to Selected Team List

[Print Selected Members](#)

[<< General Information](#)

[Setup Demo Station >>](#)

7. When you have finished selecting all the event members, click the '**Setup Demo Station >>**' button at the bottom of the 'Event Team Members' section.
8. In this section you will create the Demo Stations needed for your event.
  - a. **Station Name** – **Required**. Enter the name you want to call the demo station. Use a consistent naming convention to organize the list (i.e. POD 1 - PACS, POD 2 - Mini-Théâtre).
  - b. **Default App. Duration** – **Required**. Enter the length of time in which each demonstration lasts (i.e. 15 minutes, 30 minutes, etc.)
  - c. **# Appointments** – **Required**. Enter how many appointments can be scheduled per the length of time you listed in "Default App Duration."
  - d. **Region** – Enter the Region for the station, or leave blank. This is used for filtering when booking appointments.
  - e. **#Attendees** – **Required**. Enter the total capacity or number of people who can physically fit in the demo area -usually 10.
  - f. **Demo Person Assigned** – **Required**. Select from the drop down the person who will be doing the demonstration for this station. The list is populated by those defined in the 'Team Members List' as being demonstrators.
  - g. **Type** – Enter a value for the type of station this is, like RIS/PACS, MyVue, Vue Motion or Elite CR. This is used for filtering when booking appointments.
  - h. **Category** – Enter the product category for the station like HCIS, MAMMO, X-Ray Solutions, etc. This is used for filtering when booking appointments.

## Event Setup [ RSNA 2013 ]

Back

Dashboard

Logout

Station Details

**a** Station Name \*

**b** Default App. Duration \* 0 min.

**c** #Appointments \* 0

**d** Region

**e** #Attendees \* 0

**f** Demo Person Assigned \* ABRAHAM CORRAL

**g** Type

**h** Category

<< Team Members

Update Station

Reset

Freeze Time Slot

9. When you have completed the fields for the first station select the '**Add Station**' button. You will receive a confirmation pop up when the station is created. Click '**OK**' to return to the Station Details screen to add additional stations. Each created station will appear in the table below the fields once you hit 'Add Station'.

## Event Setup [ RSNA 2013 ]

Back

Dashboard

Logout

Station Details

Station Name \* Area 1 - RAD #A

Default App. Duration \* 55 min.

#Appointments \* 1

Region Area 1

#Attendees \* 10

Demo Person Assigned \* David Altal

Type RIS/PACS

Category HCIS

<< Team Members



Update Station


Reset

Freeze Time Slot

Name	Type	Region	Category	Edit	Delete
Area 1 - RAD #A	RIS/PACS	Area 1	HCIS		
Area 1 - RAD #B	RIS/PACS	Area 1	HCIS		
Area 1 - RAD #C: Thomason	RIS/PACS	Area 1	HCIS		

10. Repeat steps 8 and 9 until all stations have been added. If you need to edit a station, click the 'Edit' icon

(  ) to the right of the station name. If you need to delete a station, click the 'Delete' (  ) icon to the right of the station you want to remove.

Name	Type	Region	Category	Edit	Delete
Area 1 - RAD #A	RIS/PACS	Area 1	HCIS		
Area 1 - RAD #B	RIS/PACS	Area 1	HCIS		

11. Once you have added all stations needed for the event, click the 'Freeze Time Slot' Button.

[Back](#)
[Dashboard](#)
[Logout](#)

### Station Details

Station Name \*

#Attendees \*

0

Default App. Duration \*

0 min.

Demo Person Assigned \*

ABRAHAM CORRAL

#Appointments \*

0

Type

Region

Category

[<< Team Members](#)
[Update Station](#)
[Reset](#)
[Freeze Time Slot](#)

12. The 'Freeze Time Slots' section allows you to block a single period of time (i.e 12:00 AM to 8:00 AM), where you do not want to allow appointments to be booked. Only Administrators are allowed to book appointments during frozen time slots. If you do not wish to freeze a time slot click 'Finish Event Setup'.

- Start Time – Required.** Enter the time of day in which you want the freeze to begin (i.e. 12:00 AM).
- End Time – Required.** Enter the time of day in which you want the freeze to end (i.e. 8:00 AM).
- Reason – Required.** Enter a reason for why you are freezing this time slot (i.e. Show does not start until 9:00 AM.)
- IsActive – Required.** Checking this box indicates that the time slot identified above is turned on and only administrators can book appointments within that time slot.

#### Event Setup [ RSNA 2013 ]

[Back](#)
[Dashboard](#)
[Logout](#)

### Freeze Time Slot

Freezing a time slot allows you to block a single period of time (i.e 12:00 AM to 8:00 AM), where you do not want to allow appointments to be booked. Only Administrators are allowed to book appointments during frozen time slots. If you do not wish to freeze a time slot click 'Finish Event Set Up'.

a Start Time \*

12:00 AM

b End Time \*

10:00 AM

c Reason \*

Do not want to allow appointments to be booked prior to 10am.

d IsActive \*

☒

[Save Freeze Time Slot](#)
[Finish Event Setup](#)

13. Once the fields are complete click the 'Save Freeze Time Slot' button. Click 'Ok' when you receive the confirmation pop up window. You are now redirected to the beginning at the 'General Information' section. **At this point your event has been created.**










14. If you need to go back into your event to edit any details you can step through this process again, or you can click on the **'Dashboard'** button to the right and see if your event shows up in the listing.

**Note:** if your event is not set as 'Active' (from step 4) you will need to check the **'Show Inactive Events'** box at the top of the table.

**Events**

[Back](#)  
[Dashboard](#)  
[Create Event](#)  
[Logout](#)

Show Inactive Events : ☐

Duration	Events	Location	Goto	Edit
28 Jan, 2013 - 31 Jan, 2013	Arab Health 2013 Arab Health	Trade Center - SZR - Dubai -UAE	 Goto	 Edit
03 Mar, 2013 - 07 Mar, 2013	HIMSS 2013 Largest Health IT Show in U.S>	Booth # 2727, Ernest N. Morial Convention Center, New Orleans.	 Goto	 Edit
08 Mar, 2013 - 10 Mar, 2013	ASMMIRT 2013 Radiography Conference	Tazmania, Australia	 Goto	 Edit
08 Mar 2013 - 11	ECR Tradeshow 2013		 Goto	 Edit

## Frequently Asked Questions

**Question:** What to do when people can't log onto the System?

**Answer:**

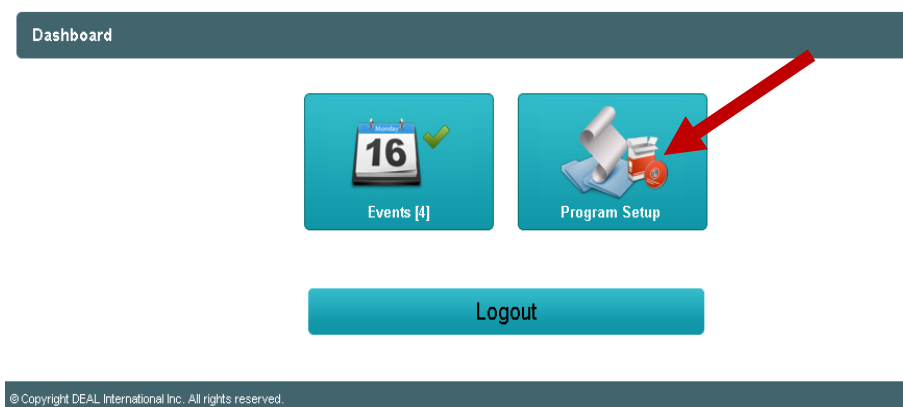
Please contact one of the system administrators. Troubleshooting this question can only be performed by users with Administrator level permissions. Carestream trade show managers should have this permission level. Contact Stacy Brien ([stacy.brien@carestream.com](mailto:stacy.brien@carestream.com)) if you need any further assistance.

If you do have the above permissions, here are instructions for troubleshooting the most common log in issues:

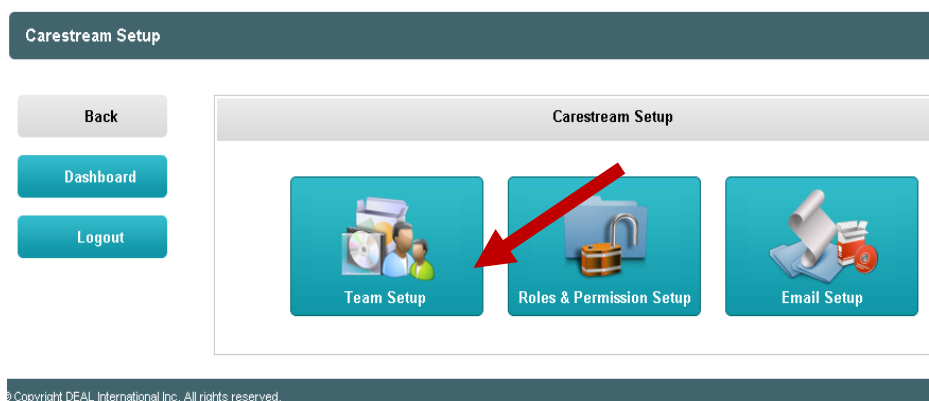
### A. If someone cannot log onto the Online Demo-Scheduling System

First, look up the person's external email address and Global ID and try logging on as him or her. If you are unable to do so, use this procedure:

1. Log on to the System with your own email address and Global ID.
2. Select Program Setup



3. Select Team Setup



- Put the last name of the person you want to check (i.e., the person who can't log into the system) in the name field shown below.

Then click on the filter icon and select the word “contains” to search for that person.

If the person cannot be found, you know you need to add them to the database of names in the system (called the “Universe”). To add a person to the Universe, see Page 19, of this User Guide, “For Administrators: How to Add a User to the Universe”.

Otherwise, proceed to Step 5 below.

The screenshot shows the 'Users' management interface. On the left is a sidebar with buttons: Back, Dashboard, All Users, Add New User, and Logout. The main area is titled 'All Users' and contains a table with columns 'Name' and 'Email'. The 'Name' column has a search input field with 'hatton' entered. A filter icon (a funnel) is located to the right of the search field. A dropdown menu is open, showing various filter options: NoFilter, Contains, DoesNotContain, StartsWith, EndsWith, EqualTo, NotEqualTo, GreaterThan, LessThan, GreaterThanOrEqual, LessThanOrEqual, Between, NotBetween, IsEmpty, NotIsEmpty, IsNull, and NotIsNull. A red arrow points to the filter icon, and another red arrow points to the 'Contains' option in the dropdown menu. A third red arrow points to the search input field.

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- Once the system finds the person, click on the “Edit” button to open that person’s profile.

The screenshot shows the 'Users' management interface with the profile of David Hatton displayed. The sidebar on the left is the same as in the previous screenshot. The main area is titled 'All Users' and shows a single user entry. The 'Name' column contains 'DAVID HATTON' and the 'Email' column contains 'david.hatton@carestream.com'. An 'Edit' button (a pencil icon) is located to the right of the user entry. A red arrow points to the 'Edit' button. At the bottom of the main area, there is a pagination bar showing 'Page: 1 of 1 Go', 'Page size: 1 Change', and 'Item 1 to 1 of 1'.

6. The User's profile screen now appears.

Ensure the following information is accurate: the User email address is correct, the User Role states "Basic Login," the User is listed as "Active," and his/her Password is correct.

Remember, a person's Global ID serves as his/her Password. Since you cannot see the Password, re-enter the person's Global ID in the "Password" field, and in the "Confirm Password" field.

Then click on the "Update" button to make sure the person's User profile is updated.

**Note:** When an individual's User Role is "Basic Login" they merely have access to view the system.

The screenshot shows the 'Add/Edit User' form with the following data:

Field	Value
First Name *	DAVID
Last Name *	HATTON
Screen Name *	DAVID HATTON
Address Line1	
Address Line2	
E-mail Address *	david.hatton@carestream.com
Zip/Postal Code	215149
City	
State/Province	FR
Region	MED Emerging Markets
Department	Product Line Manager
Country *	AE
Cell Phone	- -
User Role *	Basic Login
Password *	*****
Confirm Password *	*****
IsActive	<input checked="" type="checkbox"/>

Contract Details: [Empty text area]

Buttons: [Update] [Cancel]

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7. To verify everything is working properly, log off, and then try logging back on as that User. If log on is successful, everything is okay.

## B. If someone can log onto the System, but cannot see the Tradeshow Event

If a person can log onto the Online Demo Scheduling System, but cannot see the Tradeshow event, this means that the person has 'Basic Login' to the System and has NOT been granted any level of permissions. This means you need to grant a permission level such as 'Scheduler', 'Sales Person' or 'Demo Person'.

This is easy to do:

In the **User's profile screen**, click on the down arrow in the **User Role** field and select the appropriate permission level, then click on the 'Update' button to update the person's User Role.

The screenshot shows the 'Add/Edit User' form. The 'User Role' dropdown is open, showing the following options: Sales Person, Admin, Basic Login, Event Manager, Scheduler, Sales Person, and Demo Person. A red box highlights the dropdown menu, and a red arrow points to the 'Update' button at the bottom right of the form.

Field	Value
First Name *	DAVID
Last Name *	HATTON
Screen Name *	DAVID HATTON
Address Line1 *	
Address Line2	
E-mail Address *	david.hatton@carestream.com
Zip/Postal Code *	215149
City *	
State/Province *	FR
Region	MED Emerging Markets
Department	Product Line Manager
Country *	AE
Cell Phone	- -
User Role *	Sales Person
Password *	*****
Confirm Password *	*****
Contract Details	

Buttons: Back, Dashboard, All Users, Add New User, Logout, Update, Cancel

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