NHS

Health Education East of England

Course Management System Version 2 User Guide

(Centre Administration)
Version 1.0
October 2015

Developing people for health and healthcare

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Version Control

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Change made	
Reviser	

Table of Contents

1 What's new in this Version?

The Course Manager system allows Courses to be created and Events to be linked. Events can be broken down into separate sessions spanning one or more days. Delegates can book onto a course online, submit cancellation requests, email administrator's questions about courses and Administrators themselves can process bookings, messages and tasks directly from the home page.

Courses are the shell; they contain basic information regarding the course. An Event is a specific instance of a course. There may be one or more Event dates for a Course, but each Event in a Course follows the same programme.

Additions in V2

- Delegate types
- Packages
- Tasks
- Discount codes
- Search function
- Partial CPD

Changes from V1-V2

- Administrators permissions
- Administrators view – (no cost centre partitioning)
- Speakers – admin permissions
- One homepage
- Course and event coding
- Courses only viewable to delegates
- HTML coding required for Aims and Learning outcomes

2 Abbreviations

GDC	General Dental Council
CPD	Continuing Professional Development
HEEOE	East of England
HICOM Ltd	The organisation that supports the Intrepid Course Management system
URL	Uniform Resource Locator which is equivalent to Website Address
DDE	Director of Dental Education (Alex Baxter)
DC	Dental Co-ordinator (Liz Hope)
DDBA	Dental Database Administrator

3 Overview

Dentists and Dental Care Professionals are required to undertake continuous professional development (CPD) in order to maintain their professional registration with the General Dental Council (GDC).

Health Education East of England (HEEoE) provides funding and oversees the quality and standards of dental education throughout the East of England.

Courses are run by 12 postgraduate Education Centres located throughout the East of England. These Centres are hosted by the relevant NHS Trust in the area they are located. A map showing the location of these centres is shown below:

Through the Dental Tutor and dental administrative staff based in the Education Centre a programme of Courses is planned and delivered for CPD Courses to Dentists and their Team. The Centres also determine expenses and costs for delivery of Courses as part of the planning process.

These Course plans are submitted to HEEoE for approval. HEEoE evaluates each Course plan and, if the Course plan is approved, assigns funding for the delivery of the programme calendar over the year.

Events are published online at the following link:
https://secure.intrepidonline.co.uk/coursemanager/eoe

by Centre Newsletters or Flyers at the Local Centre. Delegates who wish to take CPD Courses are encouraged to book online via the website. Each delegate pays a contribution to the cost of the Event and is confirmed onto the relevant Event by the CPD Centre Administrators on receipt of payment.

3.1 What is the Course Management System V2?

The Course Management System (CMS) is software available online to enable Courses to be managed online. The level of access permitted to the user will dictate was the user has access to. Delegates will be allocated to view courses and book and administrators will be given operator rights which will mirror the access in CMSV1. However all users will sign into the same homepage.

Administrators are able to use the software to manage Course costs and income; publish Events on-line; manage venues, accommodation and catering needs; publish Course documentation and resources; manage speaker participation; manage waiting lists and attendance; and communicate electronically with delegates via email.

Delegates are able to search for relevant Courses, apply for Courses on-line and track their status as their application progresses. Upon attendance, applicants can record Course evaluation on-line using the Survey Module and download Course certificates.

CMS has been developed by a company called HICOM Ltd.

4 Main concepts

The following list provides a description of the main concepts or terms used by CMS:

4.1 Course and Events.

A *Course* is the name given to the Subject or content being communicated. Each *Course* will have a Title, which describes the Course, together with aims and objectives.

An Event is the name given to a Course which is being provided *at a specific time and place.* One Course can be delivered many times as Events.

For example a Course named 'Radiology Protection' can be delivered on 29 April, again on 31 June and yet again on 25 August as separate Events

Each one of these dates is an Event in the Course Manager System

The course details include the summary details such as the title of the course, the aims and objectives.

The event details include the date and time, the actual and estimated finance or costs.

Some details, such as the course venue, the speaker, course documents such as maps, CPD and the minimum and maximum number of delegates can be provided at a course level or at an event level.

CMSV2 reflects the set up as V1 where courses are created an events created under the course. However in the delegate's view of the system only courses will be available. These courses will be an amalgamation of both the course and event information that the administrator has created and the delegates will book onto the course which is infact the event to the administrator. This has been developed as on CMSV1 delegates could view both courses and events which could cause confusion when a delegate wished to book onto a course that was not running an event.

The following table provides a summary of the data stored against courses and events and which fields should be completed:

Data	Course	Event	Not compulsory
Course number	✓		
Course title	✓		
Course Status	✓		
Administrator	✓		
Co-coordinator			✓
Director			✓
Cost Centre	✓		
Budget Owner	✓		
Category	✓		
Room type			✓
Evaluation		✓	
Created date	✓		
Review date			✓
Version			✓
Publish check box (set to ‘checked when course details are to be published on the delegates website)	✓		
Folder Number			✓
Course Length	✓		
Min and max number of delegates	✓		
Waiting list	✓		
Certificate	✓		
Observations required			✓
CPD	✓	✓	
CPD code			✓
Location	✓		
Information only			✓
Accommodation			✓
Display Programme	✓		
Hands on/Team work/Core subject	✓		
Aims	✓		
Learning outcomes	✓		
Information	✓		
Notes	✓		
Venue		✓	
Event number		✓	
Online booking		✓	
Fee types		✓	

4.2 Bids

A *Bid* is simply the name given to a request given to HEEoE for a Course or Course Event to be approved. At the end of each calendar year post graduate centres submit their ‘Bids’, that is, the details of all the Courses and Events they would like to run the following academic year (starting in April). The Bid details are all entered onto the CMS in the form of Course and Event details. This will include the Course title, aims, learning outcomes,speaker details, CPD, keywords, date and time and anticipated expense.

4.3 CPD

Continuing Professional Development (CPD) is an activity which contributes to professional development. It can be *verifiable* or *non-verifiable.* All dentists need to complete 250 hours of CPD over a 5 year period. At least 75 of these must be verifiable CPD. DCPs need to complete 150 hours of CPD over a 5 year period. At least 50 of these need to be verifiable CPD. This is shown in the following table:

	Total CPD hours to be completed over a 5 year period	Total verifiable CPD.
Dentists	250	75
DCPs	150	50

Verifiable CPD needs to meet the following criteria:

- The training Course has concise educational aims and objectives
- The training Course has clear anticipated learning outcomes
- The training Course has quality control
- The training Course has documentary proof

Further information on this can be found on the General Dental Council website.

CPD is recorded on CMS in terms of *hours*.

4.4 Key words 'Hands-on', 'Core subject' and 'Team work'

CMS provides the facility for 'key words' to be used in the description of Courses so that Courses can later be searched for specific features.

4.4.1 Hands-on

The term *Hands-on* is used when the Course involves some physical activity and isn't lecture based.

4.4.2 Core subject

A core subject is one which is required for CPD. Delegates should consult the GDC website to determine whether a specific subject is required for their individual profession. It is worth remembering that in dentistry these are not currently mandatory but are *recommended*.

4.4.3 Team work

The meaning of *Team work* is a little imprecise. However, it is widely accepted that a Course which includes Team *work* would involve the dentist and their team and that the topic and content would be aimed at the entire team.

The 'key words' used to describe Courses can be checked or ticked on the Intrepid CMS software so that they can be easily be retrieved in searches carried out for Courses having those keywords. For example, a search can be carried out for all Courses which have been checked or ticked as being *Hands-on*.

4.5 Target audience

As its name suggests, Course may be aimed at delegates having different professional interests. For example, the Course may be aimed at Dentists as well as dental nurses. Alternatively, Courses may be aimed at both NHS and private practising dentists.

4.6 Payment terms

This describes the terms by which payment for the Course Event must be made. It includes the payee and timeframe for payment. This information needs to be entered into the Information field on the course. This will then be viewable to the delegates when booking.

4.7 Delegate types

In CBMS V2 there is a new feature called 'Delegate types'. There will be only one delegate type available on the east of England system which is 'Dental'. When creating fee types for the event, these fee types will need to be attached to the delegate type 'Dental'. All delegates on the system will be assigned to the 'Dental' delegate type which will ensure all delegates can see all courses.

4.8 Fee types

Fee types provide a mechanism by which different charges can be made for different professional groups. For example private dentists may be charged more than dentists working for the NHS. All fee types created in an event must be assigned to the 'Dental' delegate type.

5 Logging on to the system and changing your password

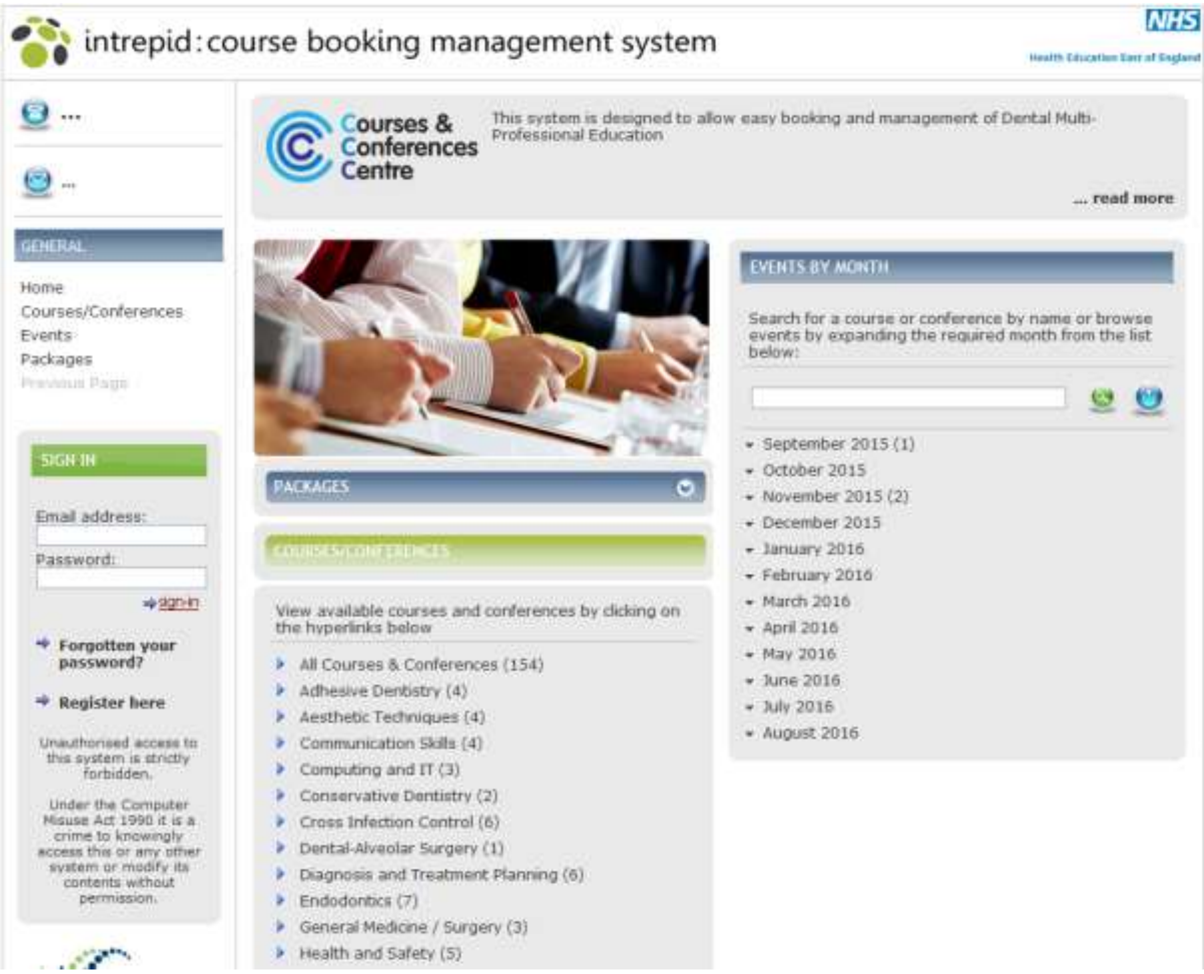
With CMS2 there is now only one homepage to login into for both administrators and delegates. The permissions for the account holder will dictate what is viewable.

To log onto CMS only one set of login details are required:

- Email address.
- Password.

To log in, complete the following steps:

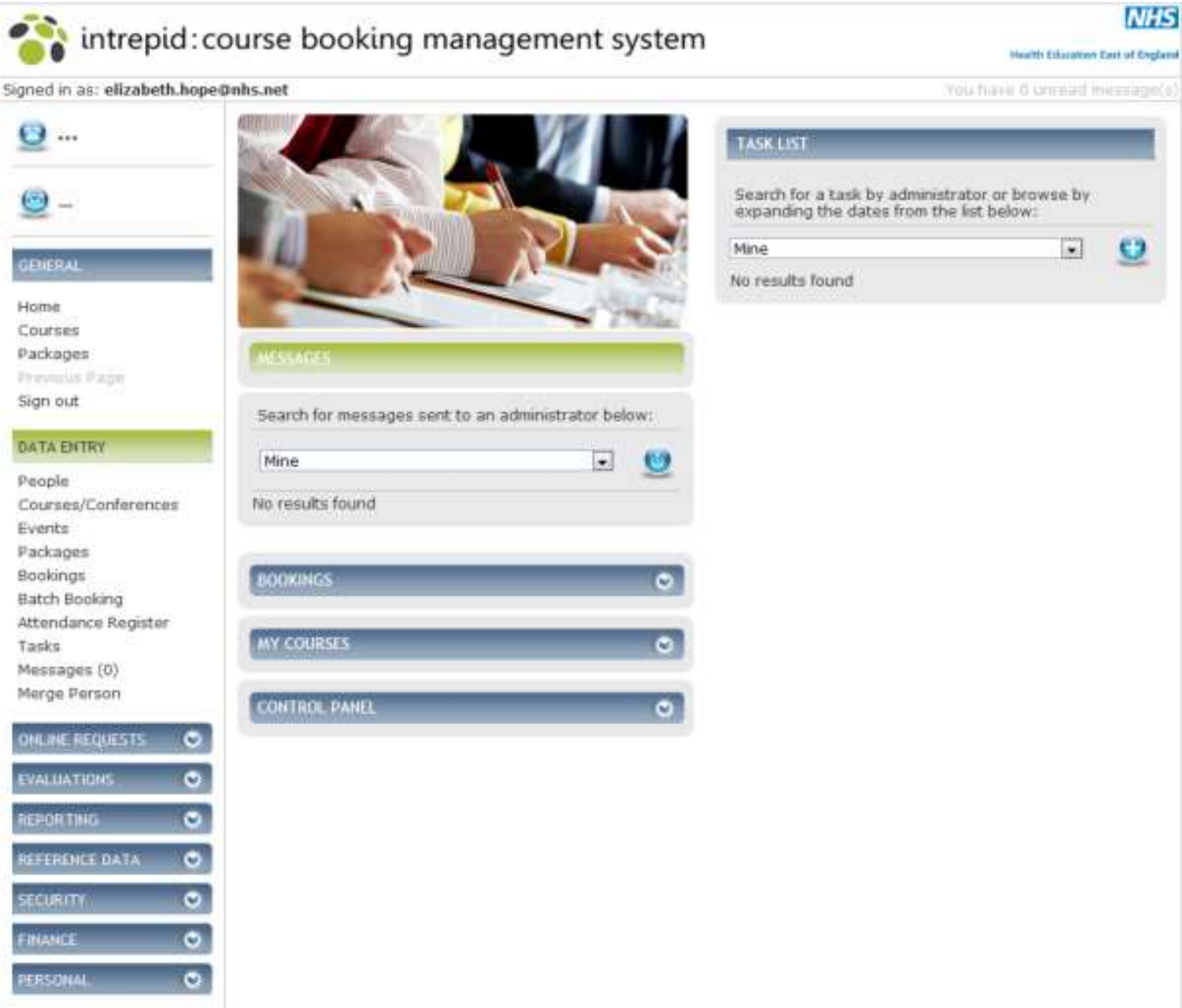
Go to the Intrepid website https://secure.intrepidonline.co.uk/coursemanager/eoe



Intrepid Web Site (drop down list of resolutions available)

- Enter your login details
- Click sign-in

The main menu will be displayed, as shown in the screenshot below:



6 CBMS Home Screen

Once you have logged onto the system there are numerous functions that will be available to you which will be covered in this section.

The **CBMS Home Screen** is displayed.

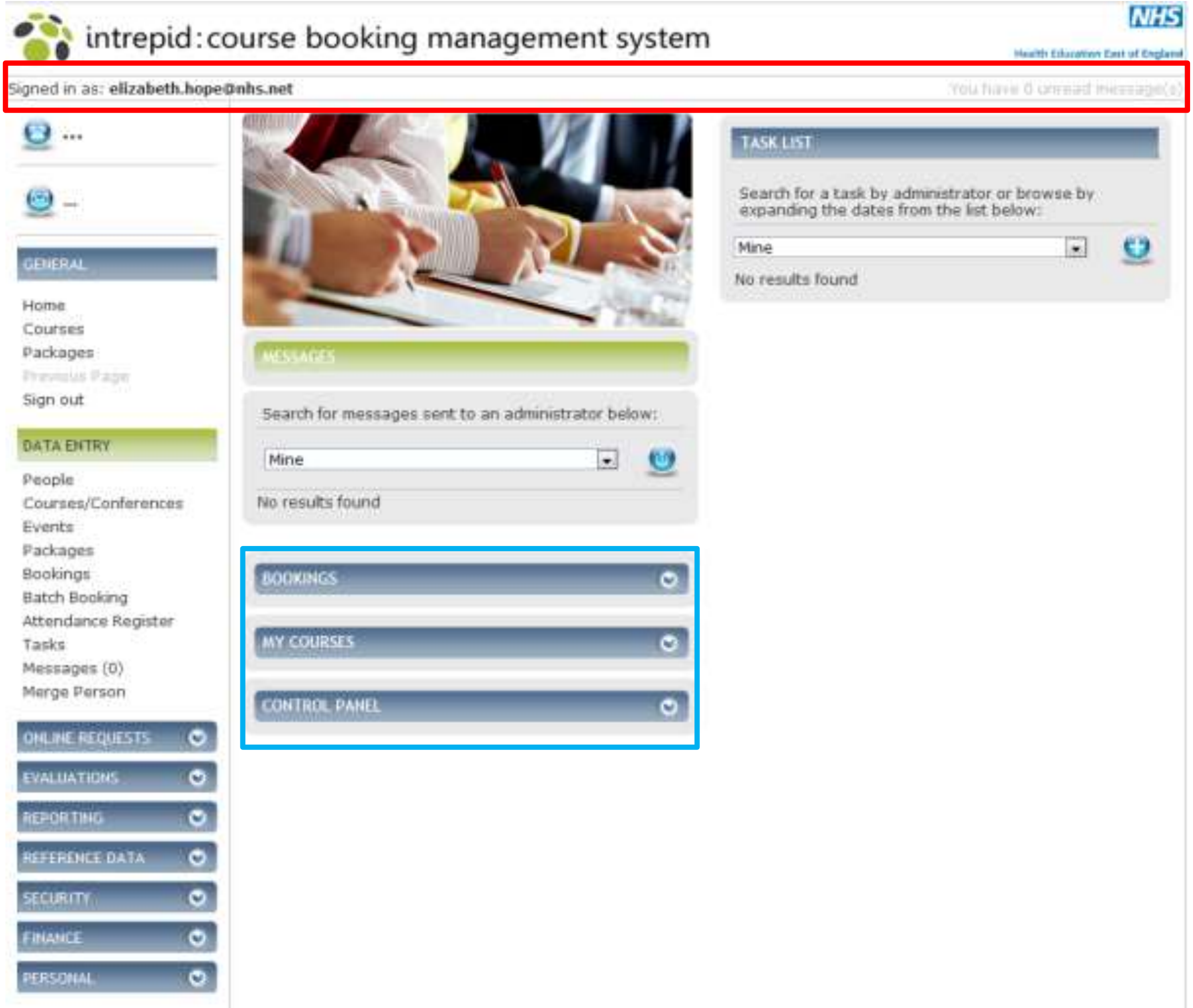


Fig 2.2 CBMS Home Screen

At the top of the Home screen is the **Notification Bar**, in the area outlined in red in Fig 2.2 above. This displays the currently logged in user on the left and number of unread messages on the right.

On the left hand side are the menu items. These direct you to the various pages within the system. As you click on an option from the left hand menu, the menu on the left may change to reflect additional sub-menu items within. To direct back to the original menu, click either ‘cancel’, ‘back’ or ‘Home’.

From the Home Screen you can perform the following actions:

- See the delegate view of Courses using the links in the General section.
- See **Tasks** for all Courses that the logged in Administrator is responsible for, in the area outlined in red in Fig 2.2 above. This drop down is located on the Course detail page of each Course. See section 8.1 for more information.
- New Tasks can be created from the list by clicking the **plus icon.**
- See Messages that have not been read by the currently logged in user, in the area outlined in green in Fig 2.2 above. (see section 8.4 for more information)

- Manage Bookings, using the booking section in the area outlined in blue in Fig 2.2 above.
- Click on the chevrons to display all Bookings that have a status of ‘Pending’ or have yet to be marked as complete, within the booking actioned field in the booking record screen. You can search and select individual Bookings. In doing so you will be taken to the Booking Summary screen for the selected booking. See section 5 for more information.

Manage **My Courses** in the area outlined in blue in Fig 2.2 above.

- Click on the chevrons this displays all Courses where the logged in user is set as the owning Administrator. See section 3 for more information.

Access the **Control Panel**, in the area outlined in blue in Fig 2.2 above, which displays shortcuts to Administrator functions. These are set using the Role within security. Click on the chevrons and access the following options:

- New Course
- New Event

7 Managing Courses

Courses are the shell; they contain basic information regarding the Course.

7.1 Creating a Course/Conference

Within the left hand menu under **Data Entry** click **Courses/Conferences.**

The **Courses** screen is displayed.

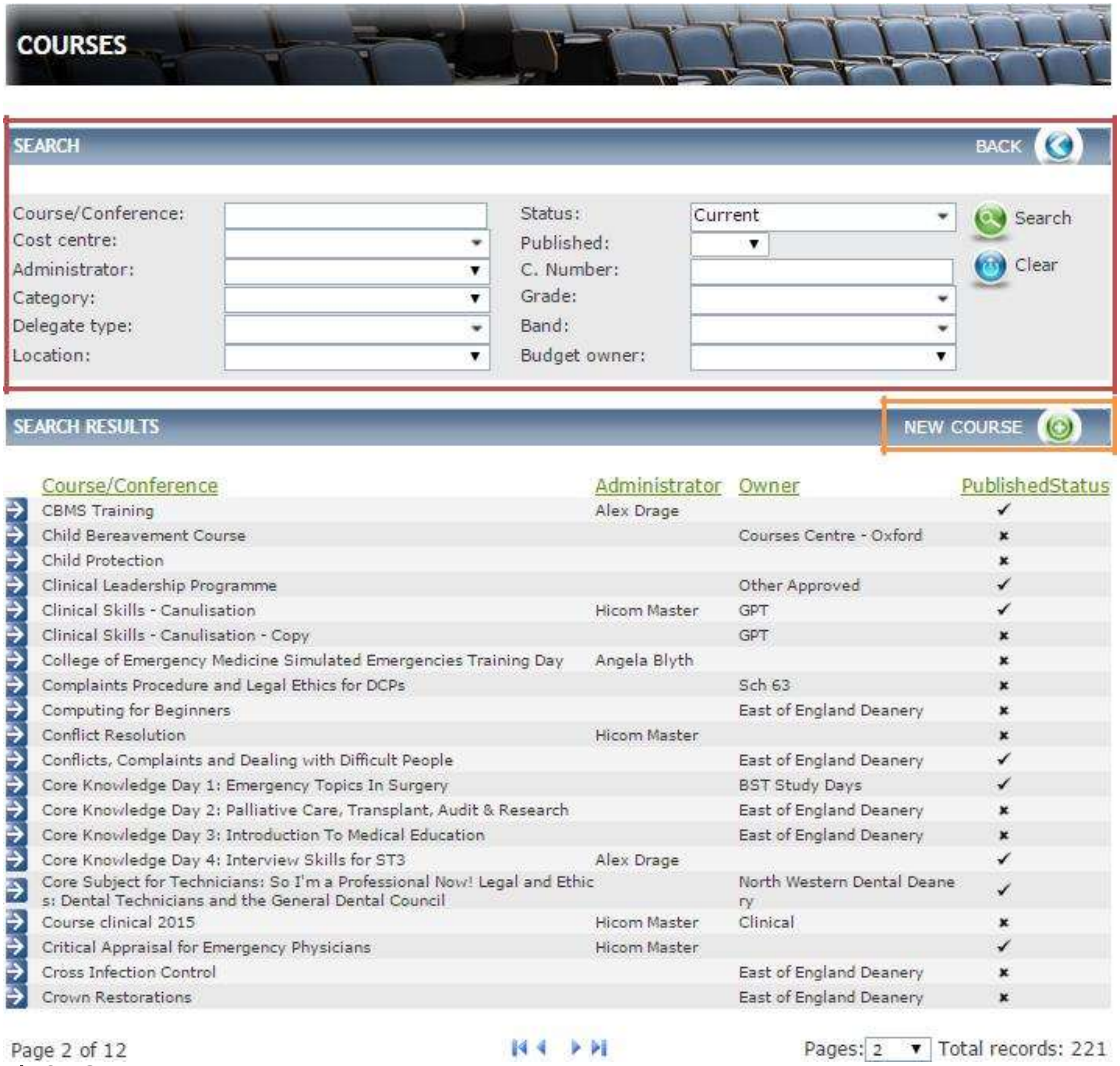


Fig 3.1 Course screen

The full Course list is displayed here. From here you can search for a Course using the filters displayed in the area outlined in red in Fig 3.1 above. Create a new Course.

To create a new Course click on **New Course** in the area outlined in orange in Fig 3.1 above.

The **New Course Detail** screen is displayed

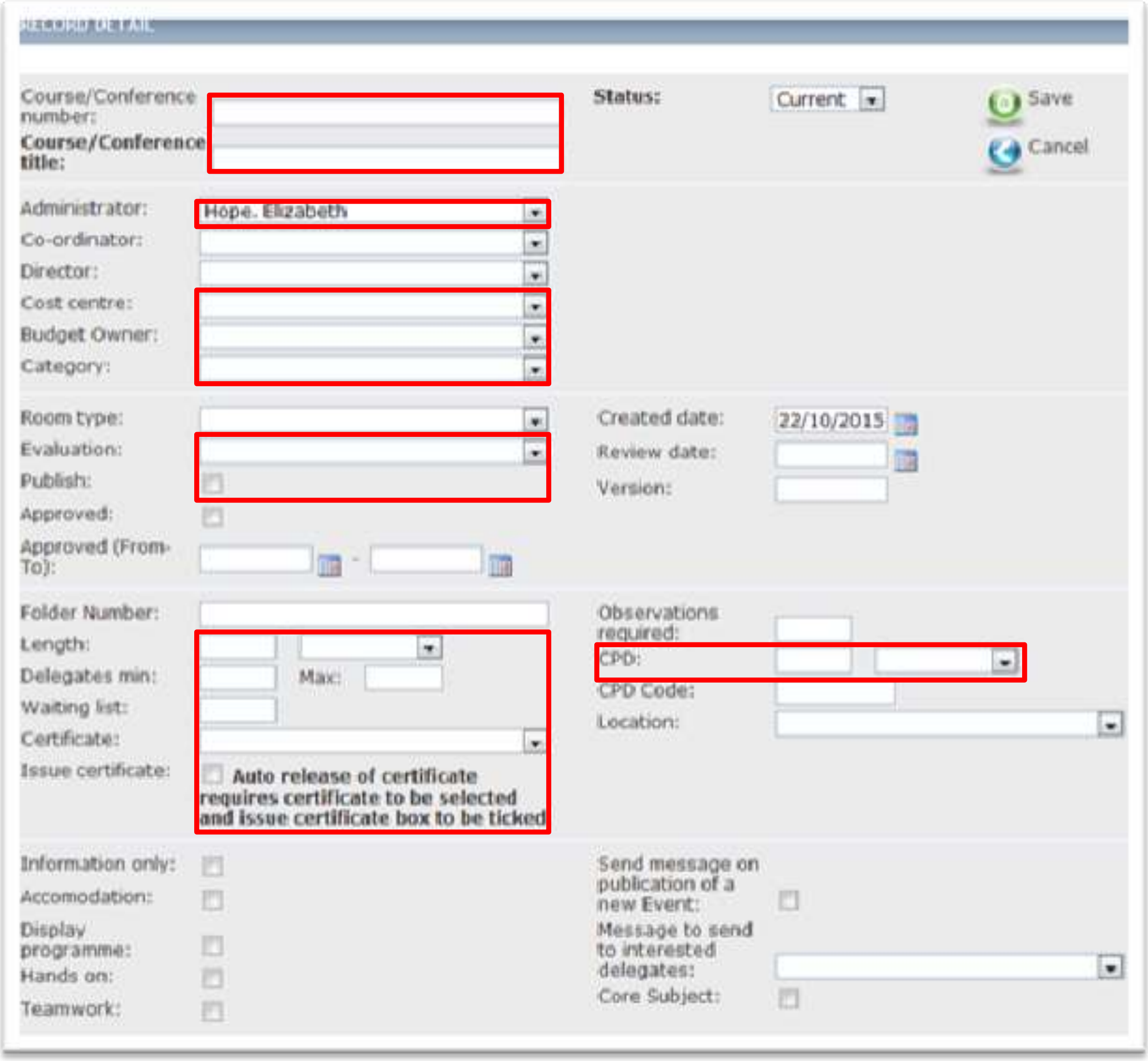


Fig 3.2 New course screen (The fields highlighted in red are mandatory.)

The New Course Detail page is the primary course page.

Some of the details entered against the Course will be inherited by the Events within this Course/Conference.

Complete the details of your Course/Conference as follows:

Enter a **Course/Conference number**, which is the identifying number for the Course/Conference, and is for administrative purposes only, and a **Course/Conference title,** which is displayed to delegates when searching for a Course/Conference or Event. This was previously automatically generated in V1 but this function has now been removed. Please see **Appendix 1** for the code convention guide.

Please then select the following details:

- **Administrator** This person receives an email when the delegate clicks "Ask a Question" when viewing an Event. This will be the PEC Dental Administrator.
- **Co-ordinator** is the person who is co-ordinating the Course. This will be displayed in the Course Programme details.
- **Director** is the person directing the Course. This will be displayed in the Course/Conference Programme details.

- **Cost centre** is the cost centre that the Course is being charged against. This will be the Postgraduate Education Centre.
- **Budget Owner** The selected owner of the Course decides which budget this Course will be part of. This will be either Section 63 or Other Funded Course.
- **Category** will assist delegates when searching for a specific Course.
- **Room type** is the type of room where the Course will be held. (Populated from reference table Location – Room Type)
- **Evaluation** allows you to link an evaluation to the Events within the Course/Conference so that it's sent automatically to all attendees. provided the following criteria are met:
  - Event date has passed
  - Delegate booking is marked as confirmed and paid
  - The Evaluation has been linked to the Course or Event
  - Delegate is marked as attended

The final step MUST be to mark the delegate as attended. The evaluation will only be sent if this is the last step.
Once the evaluation is sent, you can view the responses vie the Evaluation Reporting screen

- **Publish** Until it is published, this Course/Conference is hidden from the delegate view. You can publish a Course once the Course and Event have been approved by HEEoE.
- Enter the **Length** of the Course/Conference, the **Maximum** and **Minimum** number of **Delegates** that can book onto the Course, and how many delegates can go on a **Waiting list**.
- **CPD hours**
- **Certificate** allows you to assign a specific certificate to the Course/Conference. There is only one certificate to be selected.
- **Issue certificate** In order to release certificates to delegates, you must have set Issue certificates in the Course/Conference details, selected a certificate in the Course/Conference, and released the certificate for each delegate individually.
- **Accommodation** If accommodation is available you must select this in order to be able to add the accommodation option to the Events within this Course/Conference. (see section 4.2.6 for information on adding accommodation to an Event)
- **Display Programme** When selected there is a link to download a programme in the Course/Conference details (delegate view; and at top of course in admin view). The Programme contains the Course title, Course components, Course director and coordinator.
- **Hands on**, **Teamwork** and **Core Subject,** as appropriate**.** These are administrator only fields, to allow you to report on these details.
- **Send message on publication of new event** When a new Event is published all delegates who have expressed interest in the Course/Conference will receive an email informing them that there is a new event.
- **Message to send to interested delegates –** When you publish Events within the Course/Conference any delegates that had registered an interest in will be sent an email.

Please note the following fields available on the course which do not need to be completed:

- **Created Date**
- **Review Date**
- **Version number**
- **Folder Number**
- **Observations required**
- **CPD Code**
- **Location**

The second half of the screen allows you to write in free-text comments, to give the delegates as much information as possible. This includes and Aims and Learning outcomes.

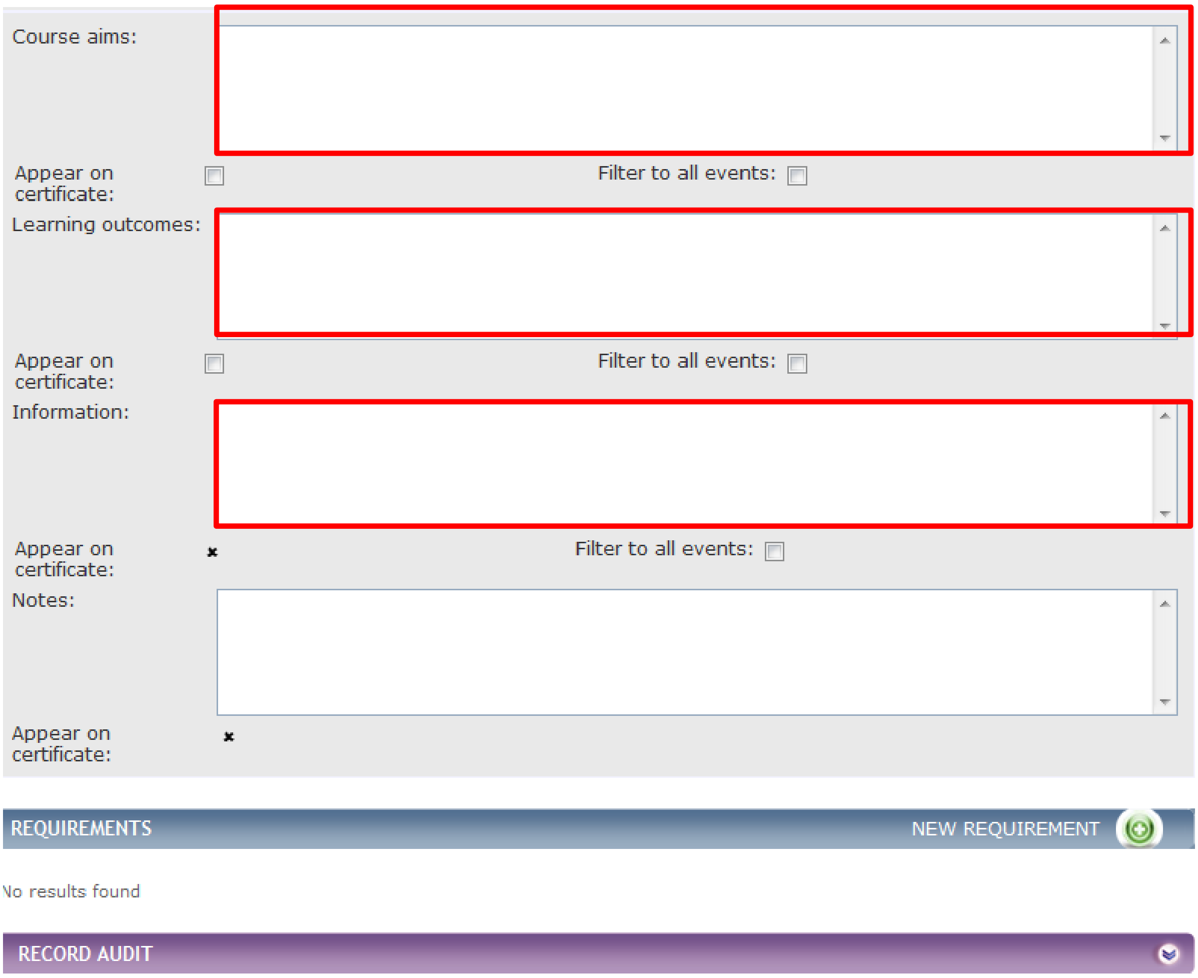


Fig 3.3 New Course screen

Complete the details as follows:

Enter the **Course Aims**, these appear on the delegate's view within the Course Aims tab and displayed within the downloadable Course information.

Please note that this has a free text field which is for outlining the aims and objectives of the Course (displays on the website and is locked on approval of the Course).

Ensure that there are no spelling mistakes or grammatical mistakes. It is also important to use proper wording for the Aims & Objectives. The use of punctuation appropriately is extremely vital. It is suggested that there are 3 Aims & Objectives for each Course.

This field also requires the use of HTML coding **{br/}** to add a line break in the text and ensures that the copy is correctly formatted on the delegates certificate.

Please see the example below:

Display in the back end	Display on the certificate
At the end of the session you will be aware of : **{br/}** Recent discoveries of bacteria related diseases**{br/}** New equipment to be used by dentists.	At the end of the session you will be aware of : Recent discoveries of bacteria related diseases New equipment to be used by dentists.

Learning Outcomes appear on the delegate's certificate.
Again this is a free text field and the use of **{br/}** also applies.

Information appears on the delegate's view of the Course above the Tabs. This is where payment information needs to be entered as the 'Fee Comments' box no longer exists.

There are also boxes ' **Appear on Certificate'** beneath the Aims and Learning outcomes fields please ensure that these **are not ticked** as this information automatically pulls onto the certificate.

Once the relevant information is entered ensure that you click on **Save** to store your Course/Conference.

Note, once you have saved a Course/Conference, you can edit it.

7.2 Course Requirements

You can add Requirements to a Course; these allow you to predefine certain criteria that must be met by a delegate. For example, a delegate who is looking to book on this Course must have an educational supervisor approval form and or personal supporting evidence.

New Requirements can be added at the initial creation of the Course or a later date.

To add a new requirement, you must first find your Course/Conference. To do this, click **Courses/Conferences** from the **Data Entry** menu.

The **Courses** screen is displayed.

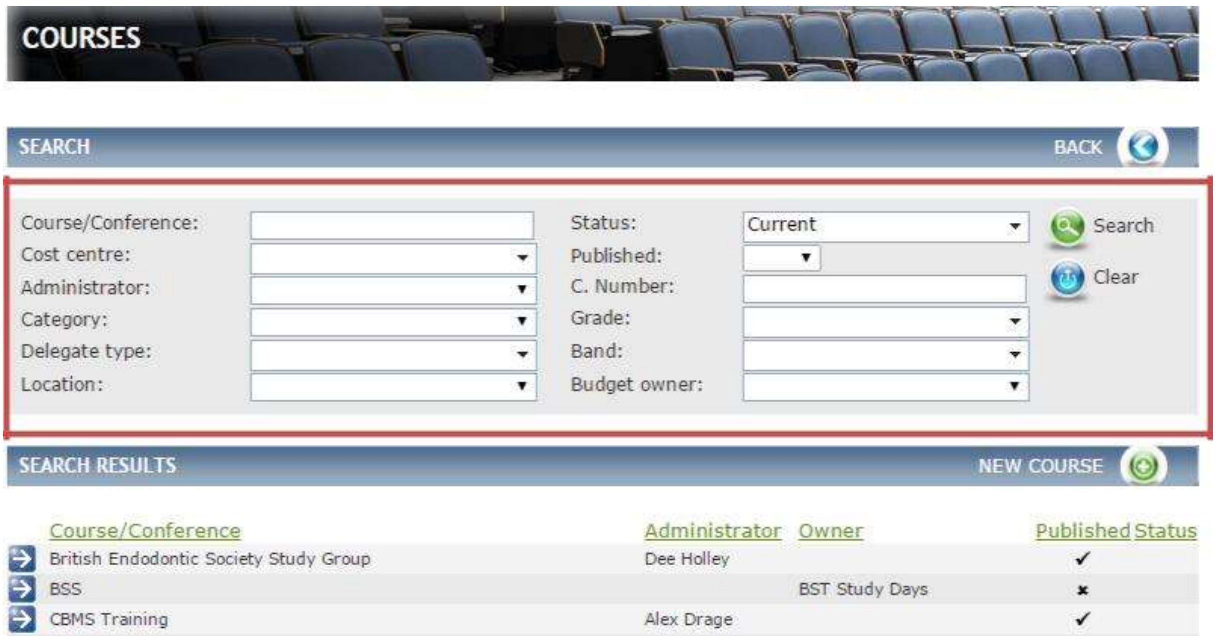


Fig 3.5 Courses screen

Use the search filters, in the area outlined in red in Fig 3.5 above, to find the Course/Conference. Once you've found the Course/Conference, click on it. This takes you to the Course Summary screen.

Within the Course Summary screen, if you scroll to the bottom of the page you will see the **Requirements** header. Any previous Requirements added to the Course will be listed within this field as shown in Fig 3.6 below.

Fig 3.6 Course requirements

To create a new Requirement click on **New Requirement.**

The **Course-Requirement Detail** screen is displayed.

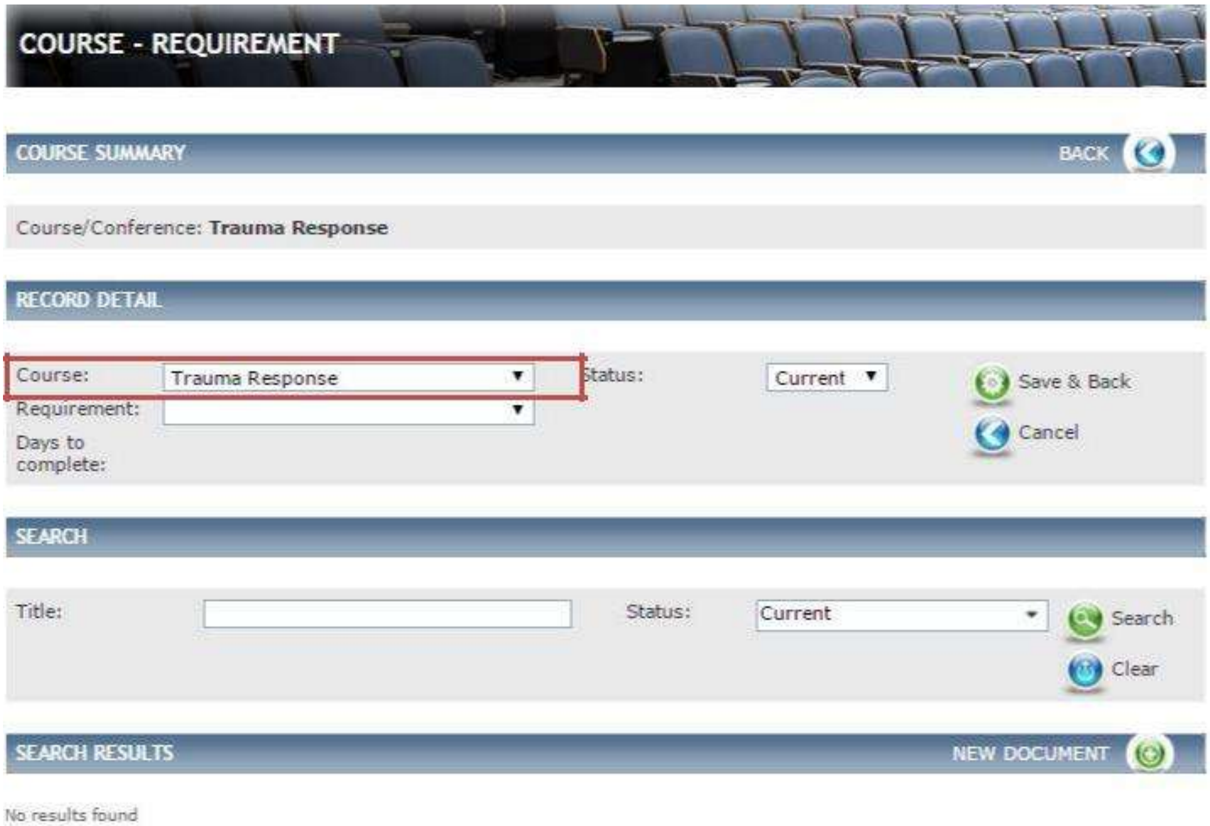


Fig 3.7 Course-requirement detail screen

Complete the details as follows:

- The **Course** details will populate in the area outlined in red in Fig 3.7 above. To select a different Course click on the drop-down and select a Course.

Select a **Requirement**.

- If the requirement has a number of **Days to complete** these will be displayed here.(Requirements are added within the reference table – Booking-Requirement)

Click **Save & Back.**

All Events created within this Course/Conference will have these requirements added to them.

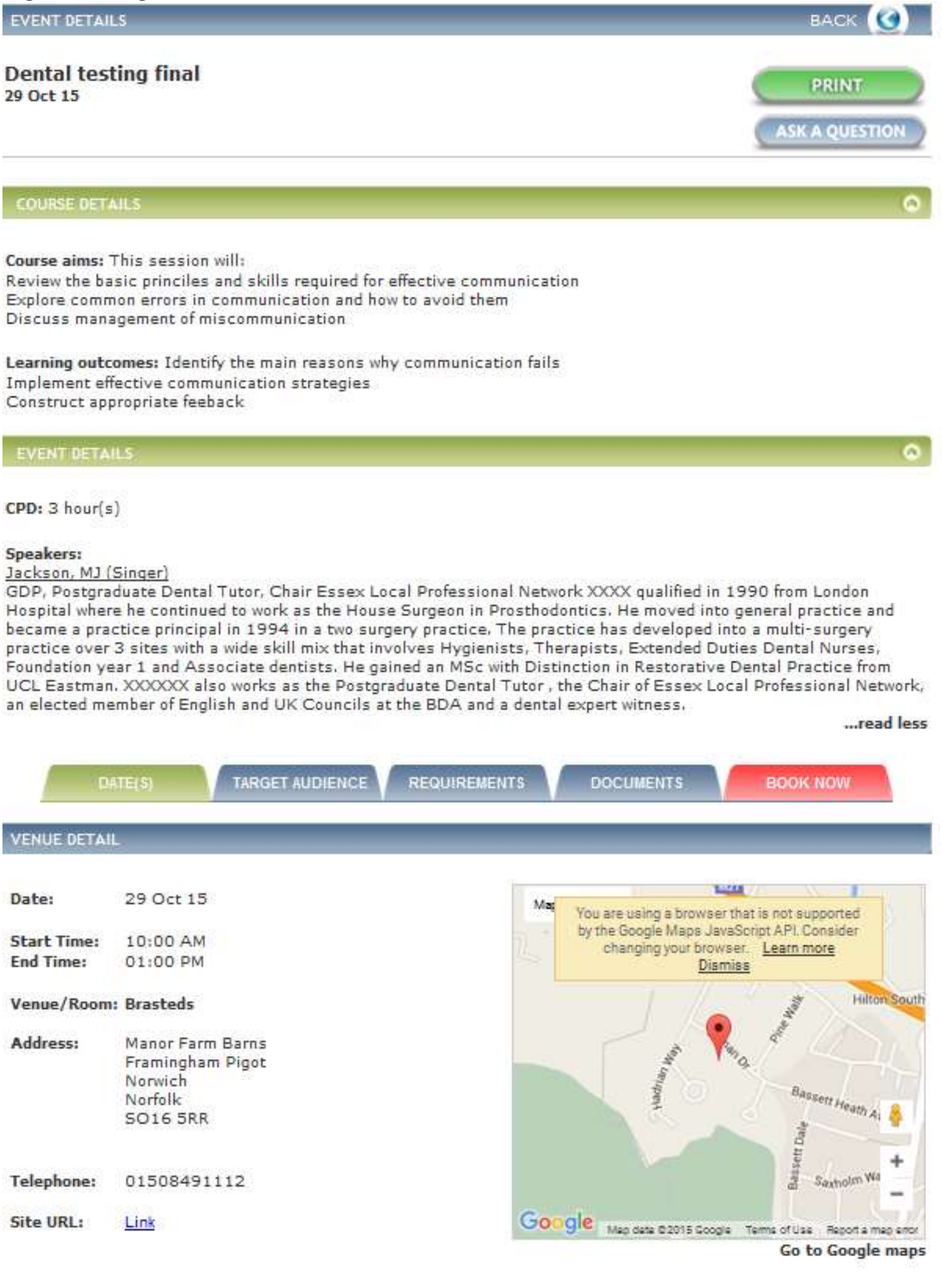
Requirements are displayed to delegate in the Course details, and against their event booking. Administrators can mark a Requirement as completed for a specific delegate.

7.3 Delegates view

The delegate view of the Course/Conference details is displayed below.

The delegates screen shows the delegates view of the Course/Conference details. When creating a Course the details you enter in the Course **Information** field are displayed to the delegate as per the image above and the information you enter for the **Aims** and **Learning outcomes** will appear in the tab in the area at the top of the screen. These details will also appear in the downloadable Course **Information**, when you click on Information in the area outlined in purple in Fig 3.4 above.

Fig 3.4 Delegate view



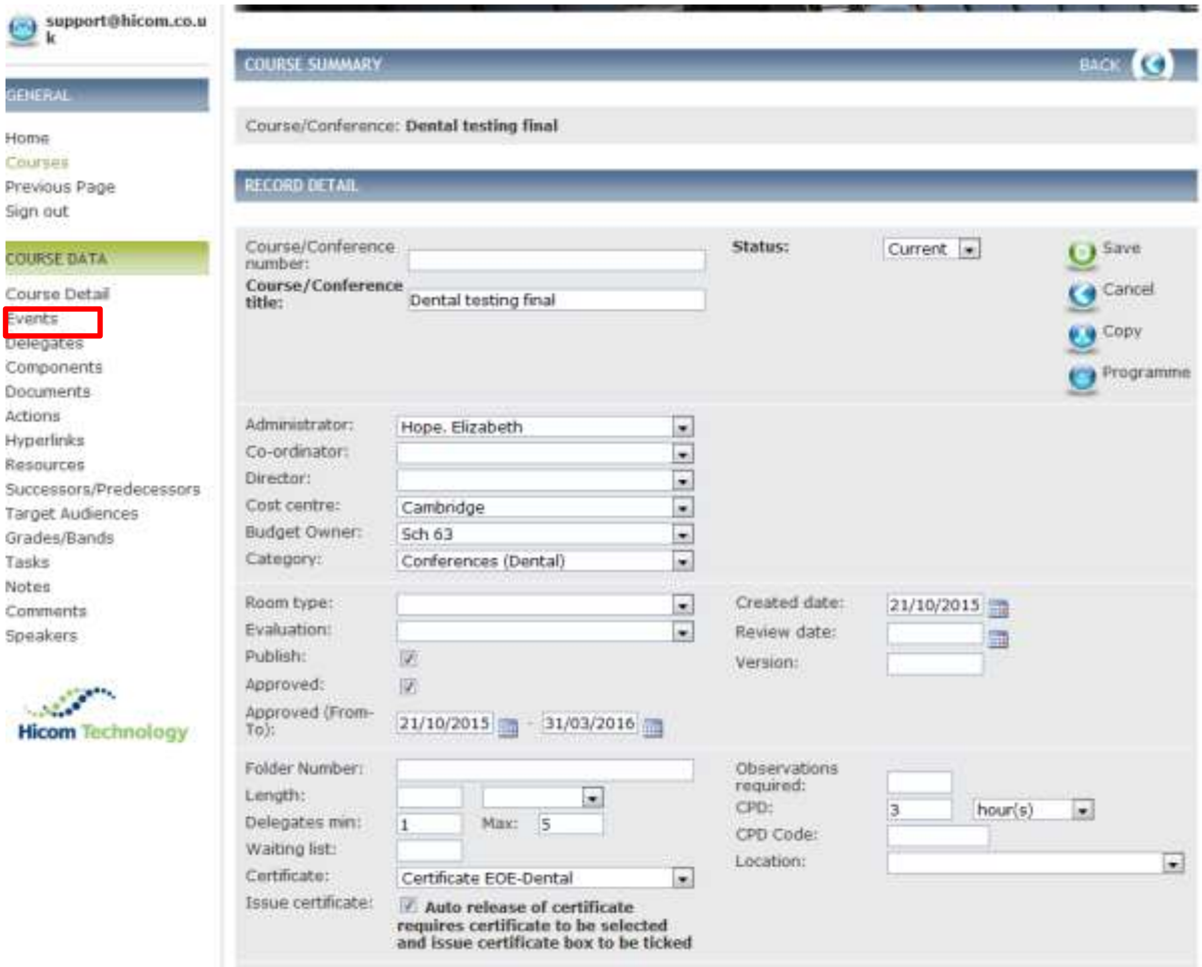
8 Managing Events

An Event is a specific instance of a Course. There may be one or more dates for a Course, but each Event in a Course follows the same programme. Events form the core of the Course. You can create, view and amend Event details.

8.1 Creating an Event

Events are created within the Course. So before you add an event you first need to find/create the Course. You can find a course by following the instructions in section 9.1.

Once you have found/created the Course, from the Course summary screen on the left-hand side, click on **Events.**



The **Course -Events** screen is displayed.

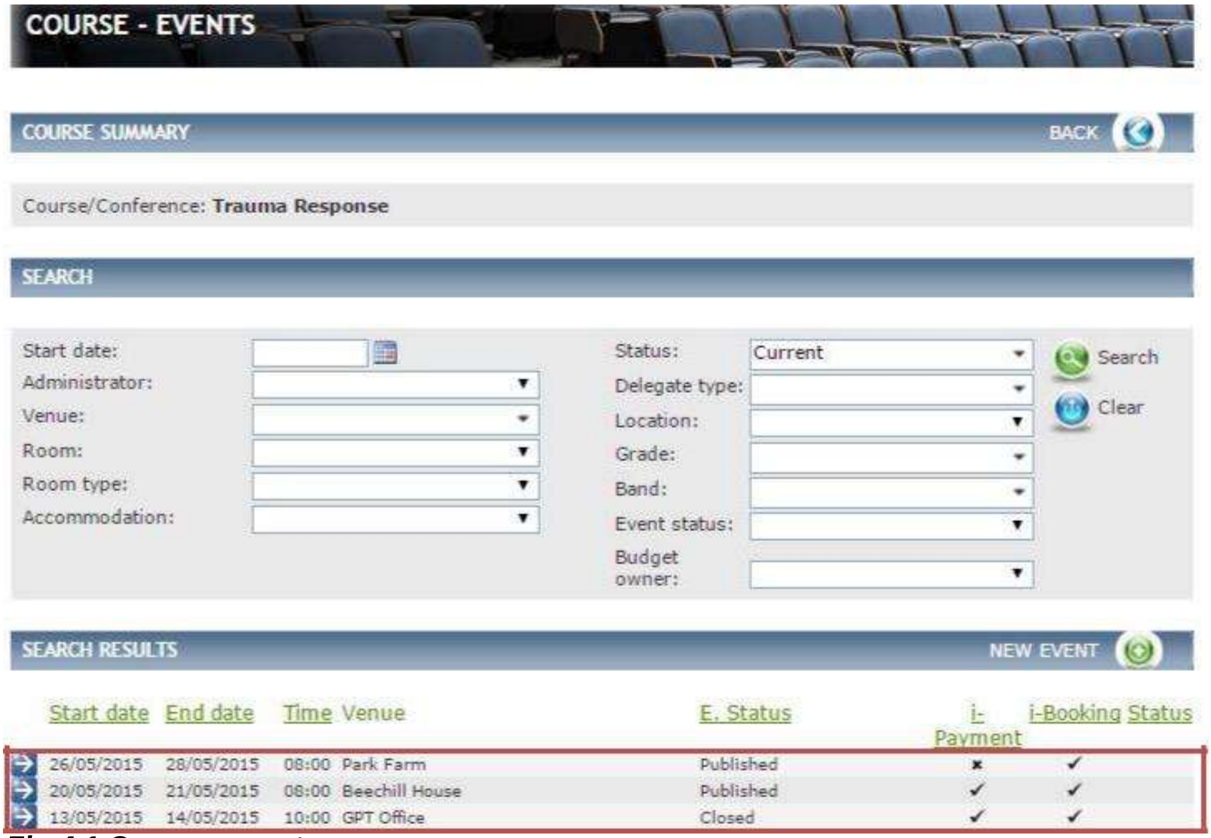


Fig 4.1 Course -events screen

If any Events have already been added they will appear in the bottom half of the screen, in the area outlined in red in Fig 4.1 above.

To add a new Event click on **New Event.**

The **Event Detail** screen is displayed.

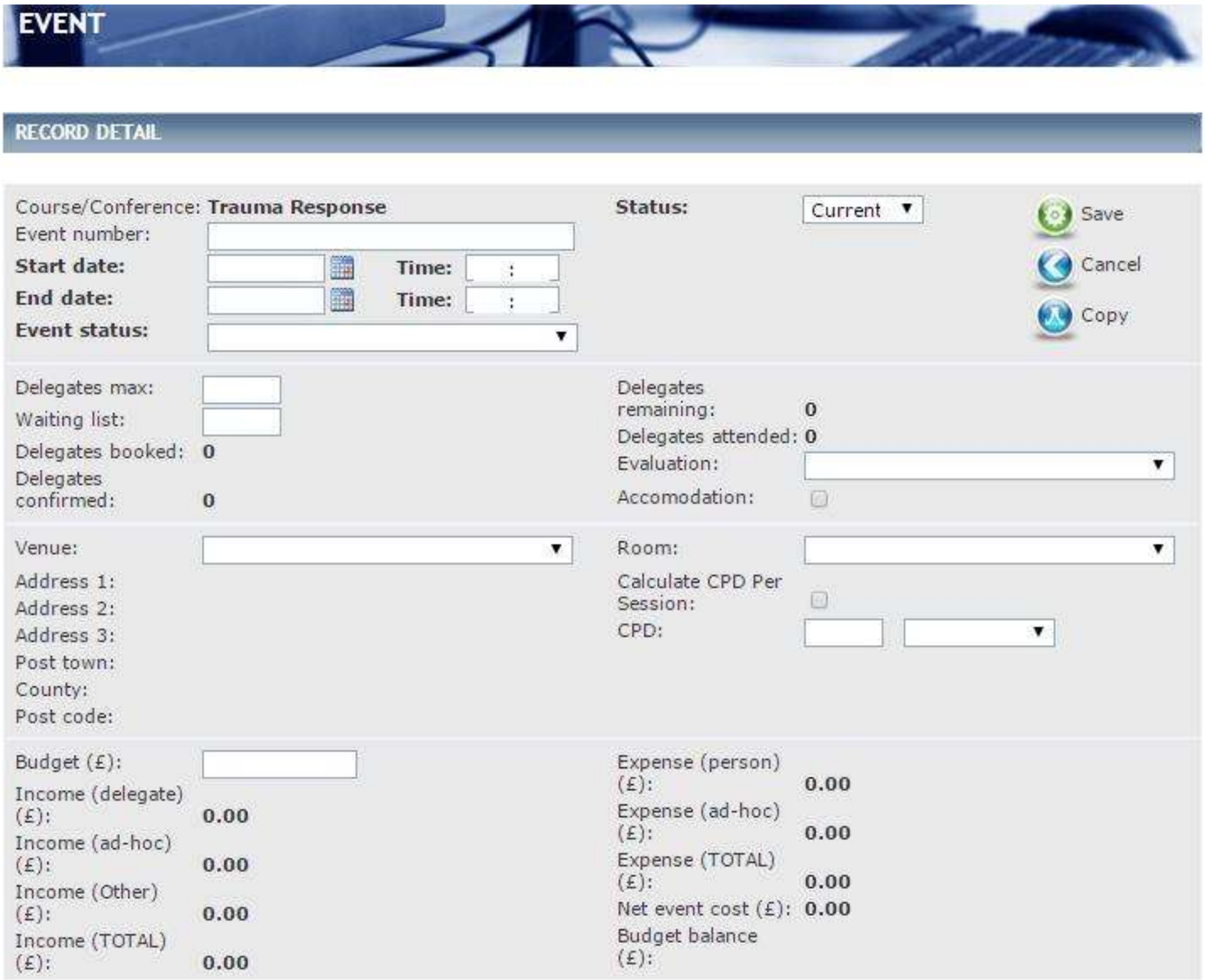


Fig 4.2 Event detail screen

Complete the details as follows:

- Enter **Start date, End Date** and **Time** for this specific Event. These will be displayed to the delegate when searching for an Event.
- Enter the **Event number**. This is for administrative purposes only and not displayed to the delegate. Please see **Appendix 1** for the coding convention.
- Select an **Event Status**. This will be 'Ready for approval' when preparing for the bids process or if cancelling a course 'Cancelled'. Once the event is approved, the status can be changed to 'Published'
- Enter the maximum number of delegates that can attend in **Delegates**
- **max** and how many delegates can go on the **Waiting list.**

Then select the following:

- **Evaluation –** select the required **Dental Evaluation** to be sent to the delegates. The Evaluation will be available for a period of 30 days – there is no longer the requirement to enter the expiry date is this will now be automatic and after the 30 day period will disappear from the delegates account.
- **Venue –** this will be from a drop down menu. If your venue is not on the list please contact the Dental Data Administrator.
- **Room**
- **CPD hours for the event**
- Enter the **Budget** allowance for this Event. This will be the total of the bids amount e.g total cost of lecture fees, LOE, travel etc.

The second half of the screen consists of tick-boxes and free-text fields see Fig 4.3 below.

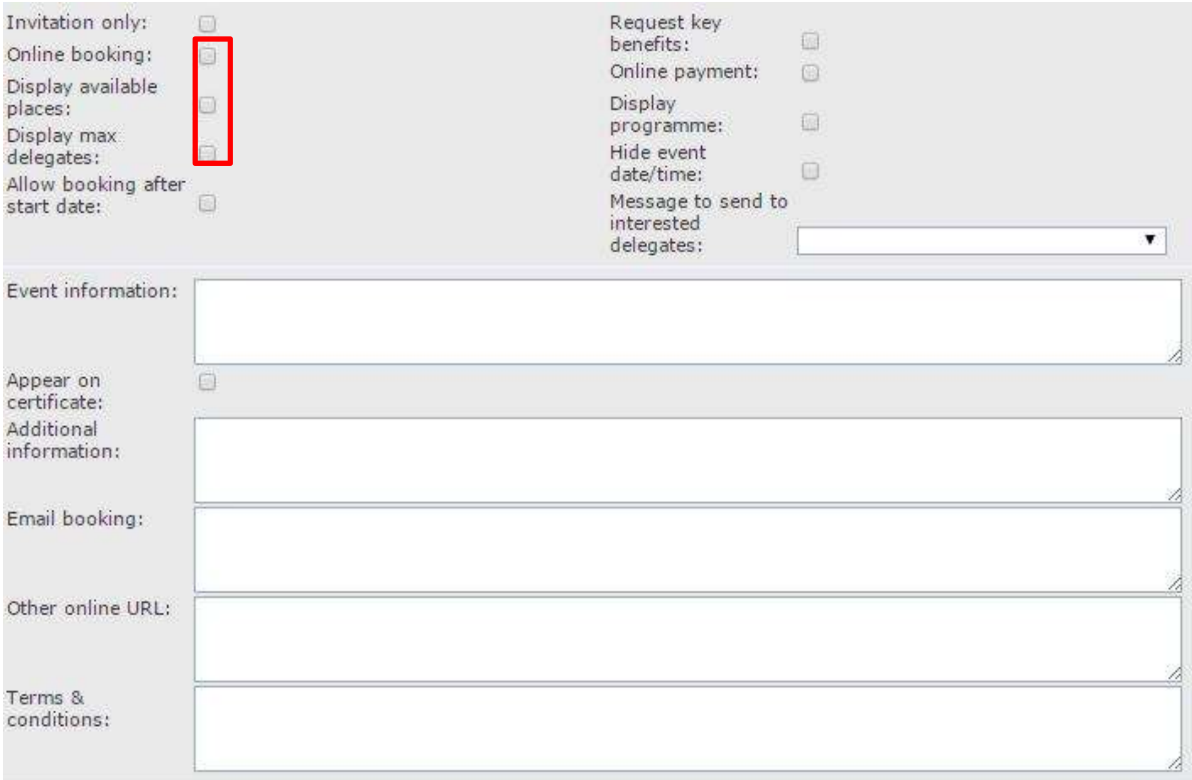


Fig 4.3 Event detail screen (The fields in red are mandatory)

Complete the details as follows:

Select the following if relevant:

- **Invitation only** if you want to restrict delegates to only be able to book onto an Event if invited.
- **Online booking** allows delegates to book online. Please ensure that this is ticked.
- **Display available places** and **max delegates**. This information will display to the delegate in their course summary.
- **Allow booking after start date** should you want to allow delegates to book on an event after the start date.
- **Display programme** if you want the programme details displayed to the delegate
- **Hide event date/time** if you want to hide the event date and time from the delegate
- **Message to send to interested delegates** will enable the delegate to be able to select register interest icon in the Course details and be notified via email when further event dates are published in. (Populated from reference table message Template types – Event)

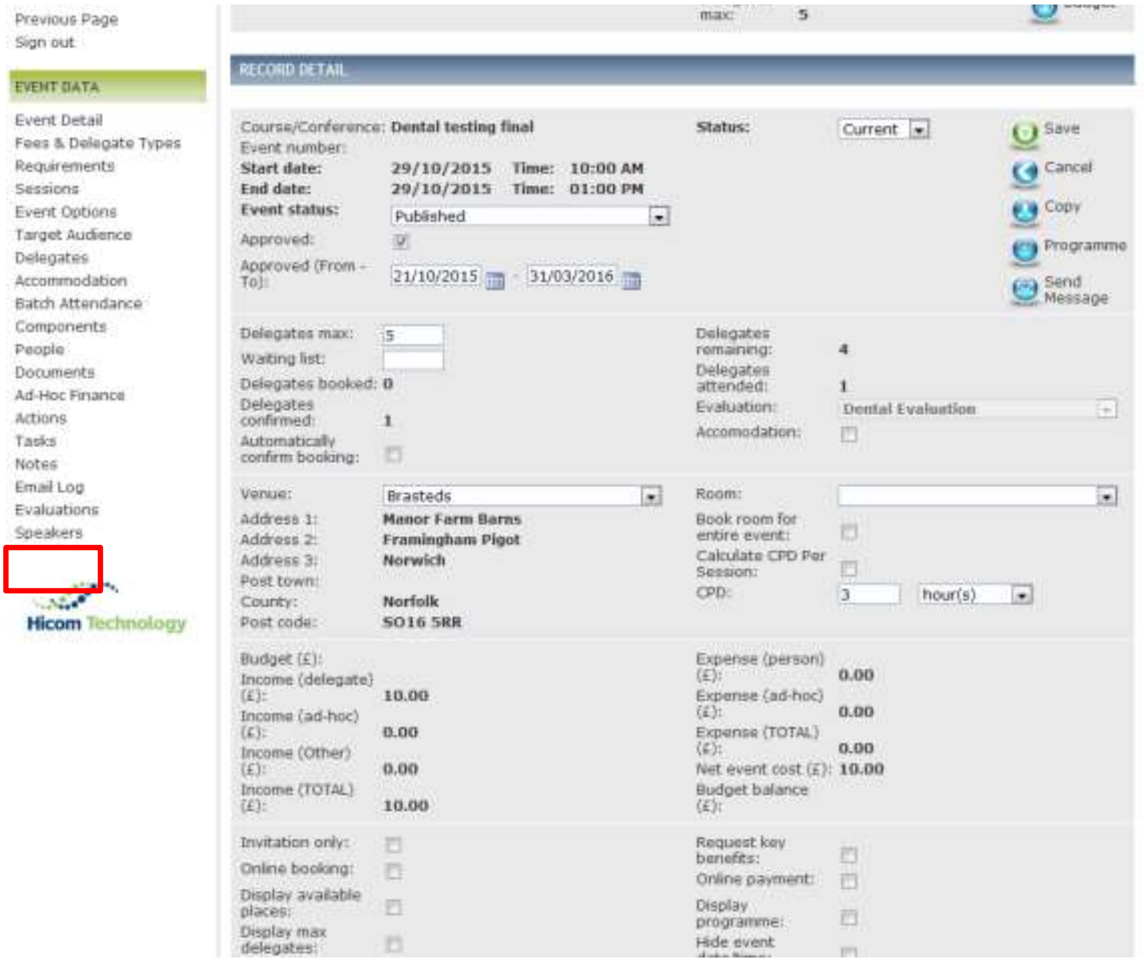
Enter the **Event information –** this is displayed in the information sheet that delegates can download from the Event details.

Enter **Additional information** which is displayed to delegates in the list of events within a course, **Email booking** if you want to provide another contact and any **Other online URL** relevant to the event and the **Terms & conditions.**

8.1 Speakers

You will need to add Speakers to the event.

To create a new Speaker, from the Event summary screen, click on **Speakers** from the left hand menu.



The **Event – Speakers** screen is displayed

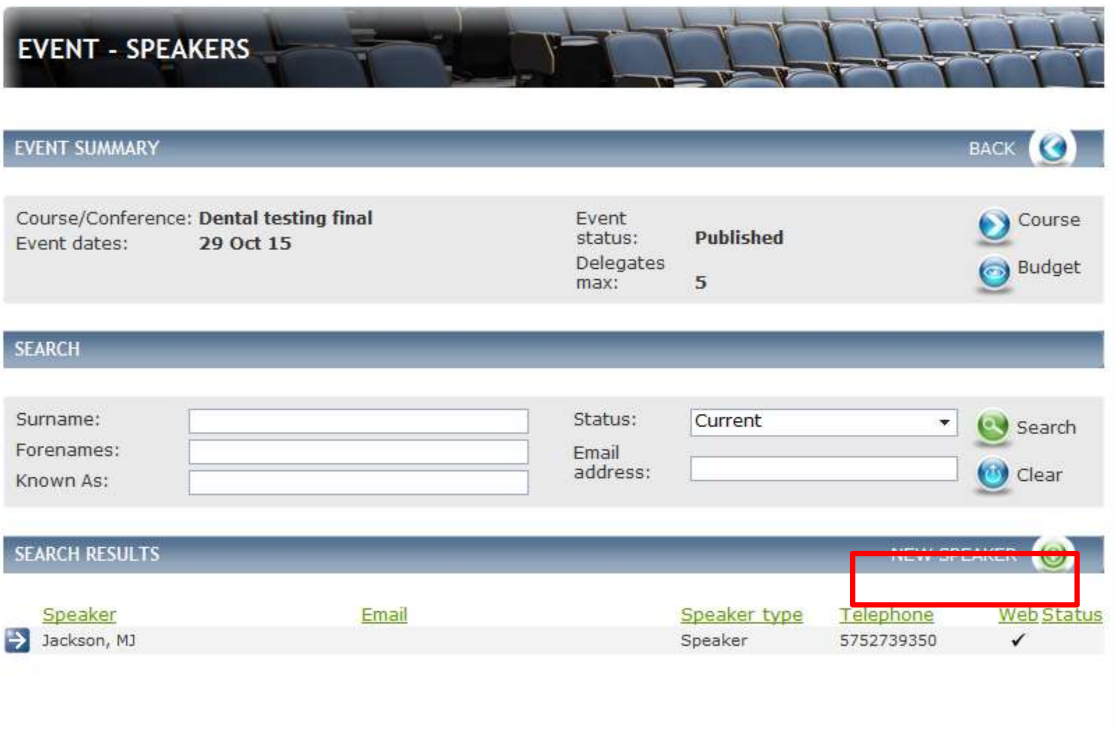


Fig 3.28 Event – speakers screen

If any Speakers have already been added they will appear in the bottom half of the screen, in the area outlined in red in Fig 3.28 above.

Click on **New Speaker.**

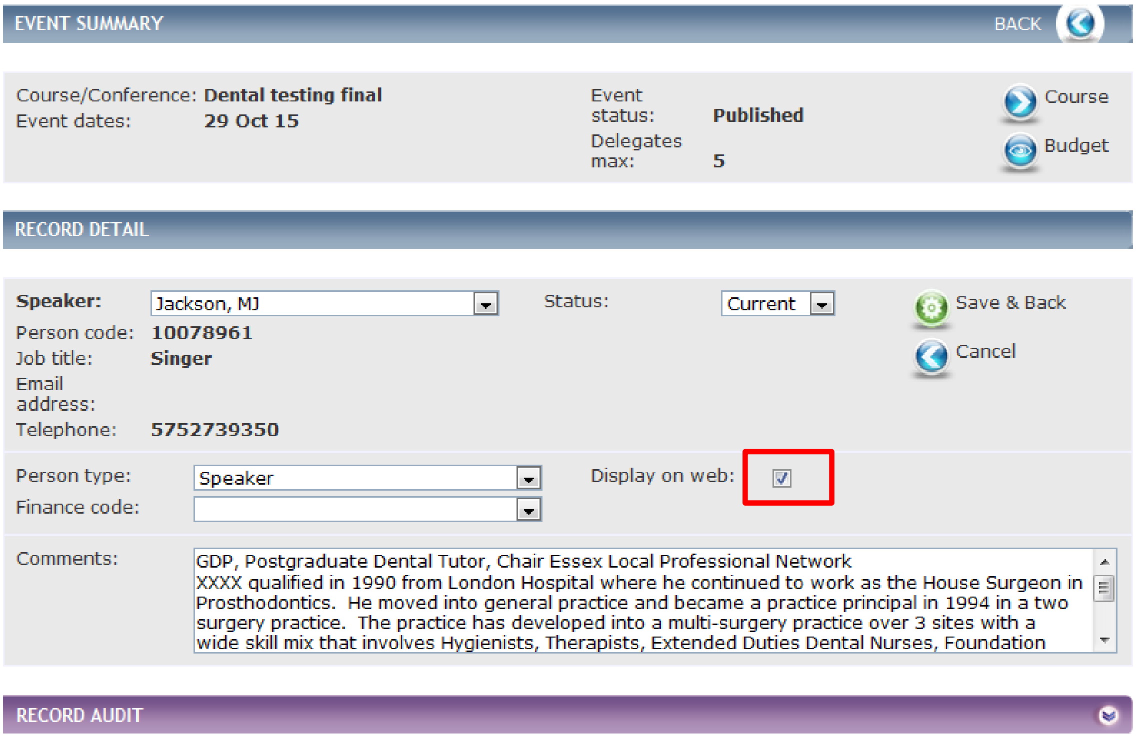


Fig 3.29 Event – speakers detail screen

Complete the details as follows:

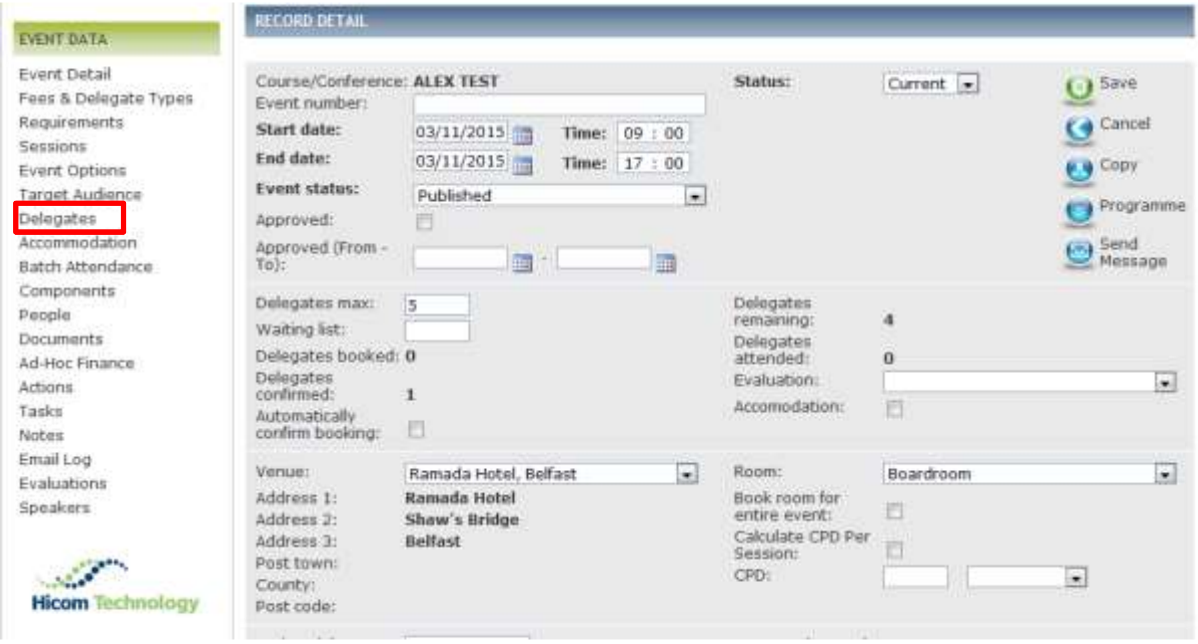
> Select the **Speaker** from the drop down. (Populated from when creating a new person and selecting a person type of speaker)
>
> If the speaker is existing their biography will appear in the comments section.
>
> Please then tick ‘Display on web’ to ensure that the speaker is displayed on the Course information to the delegates.

Click **Save & Back.**

You are returned to the Speakers list screen, where you will see that your Speaker has been added.

8.2 Registers and Badges

To pull off registers and badges for your event please click on delegates in the Event Data menu



The Event Summary box at the top of this page will carry icons which will enable you to download the following:

- Dinner List
- Register
- Badges
- Labels

8.3 Adding Additional Details

Once you have created your Event you can add the following details:

- Fees & Delegate Types
- Requirements
- Sessions
- Event Options
- Target Audience
- Accommodation
- Batch Attendance
- Components
- People
- Documents
- Ad-hoc finance Actions
- Tasks Notes
- Evaluations

The items in red are mandatory.

When you are in an existing Event you will see at the top of the screen the Event Summary. As shown in Fig 4.4 below

Fig 4.4 Event summary

From the summary section you can view the following:

- Course details, click on the blue arrow icon next to Course and it will take you to the Course record.
- Budget details, click on the icon next to Budget to be taken to the budget.

8.4 Fees & Delegate Types

Course Manager V2 requires Fees Types to be linked to Delegate types. In the case for east of England, there is only one delegate type 'Dental' to which all fee types need to be linked to.

To add Fees and Delegate type, from the **Event Data** left hand menu click on **Fees & Delegate Types**.

The **Event – Fee & Delegate Types** screen is displayed.

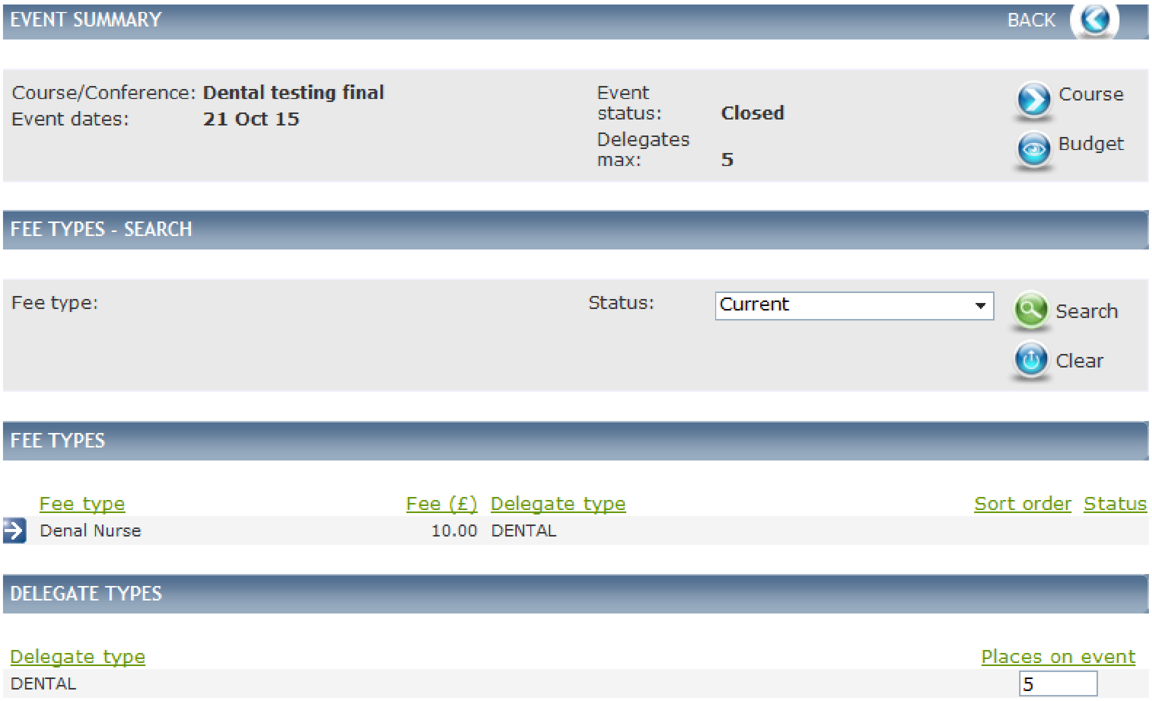


Fig 4.5 Event – Fee & delegate types screen

If any Fees and Delegate types have already been added they will appear in the bottom half of the screen, in the area outlined in red in Fig 4.5 above.

To add a new Fee, click on **New Fee**.

The **Event – Fee Type Detail** screen is displayed.

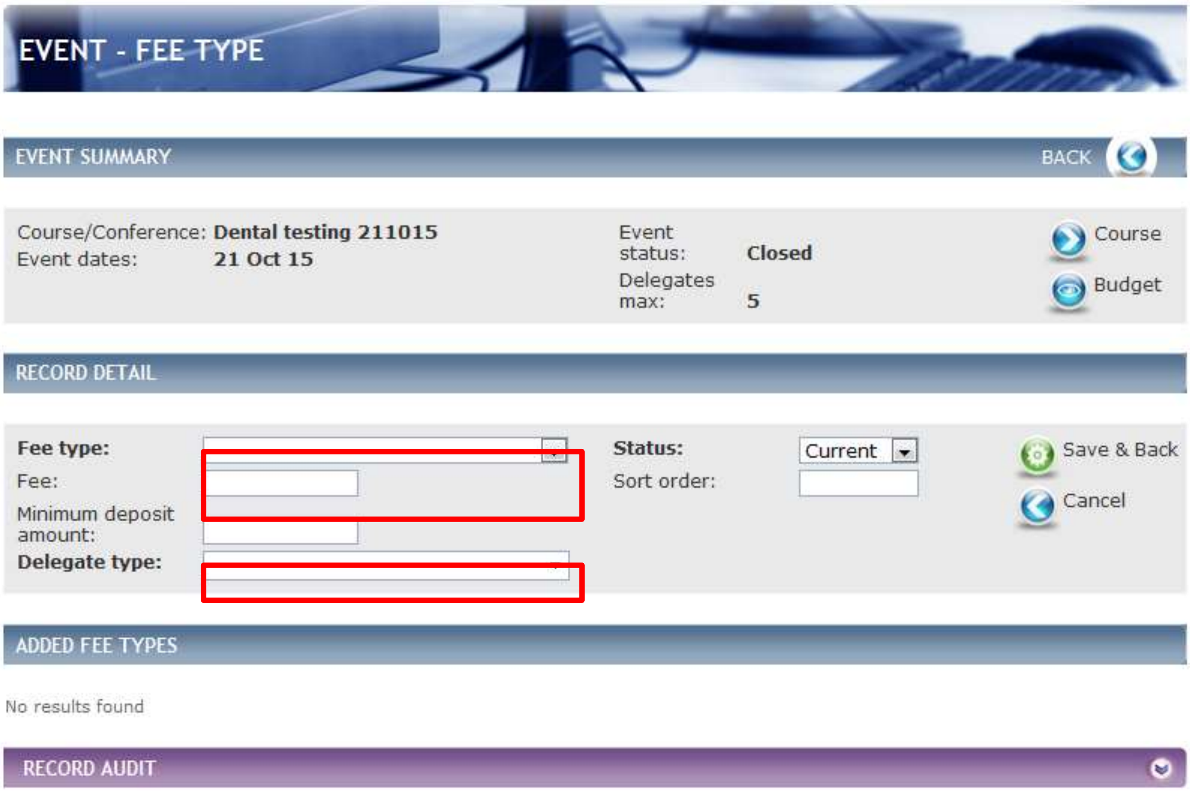


Fig 4.6 Event – fee type screen

Complete the detail as follows:

- Select a **Fee Type** from the drop down. (Populated via reference table Event – Fee type) this is defining what the cost is against. Examples would be; 'NHS Dentist' or 'Dental Nurse'.
- Enter the **Fee** and this will be displayed to the delegate in the Book now tab. The sort order will define the in which order the fees are displayed.
- Select the **Delegate type** (Dental).

Note: Delegates will only see the fee type which is set for their delegate type. If there is no fee for their delegate type they will not be able to book the event. Hence why it is imperative that all fee types are linked to the delegate type 'Dental' – to which all delegates will be set up as in their user accounts.

Click **Save & Back.**

You are returned to the Event – Fee & Delegate Types list screen, where you will see that your Event – Fee & Delegate Types have been added.

Note: Once a delegate has booked onto your event, the fee type they selected becomes **read-only**, meaning that you cannot change the delegate types or make the fee type inactive. Make sure you check your fee types and delegate types carefully before publishing your event.

When you create a new Fee and Delegate type you will need to enter the number of places for each Delegate type in the area outlined in red in Fig 4.7 below.

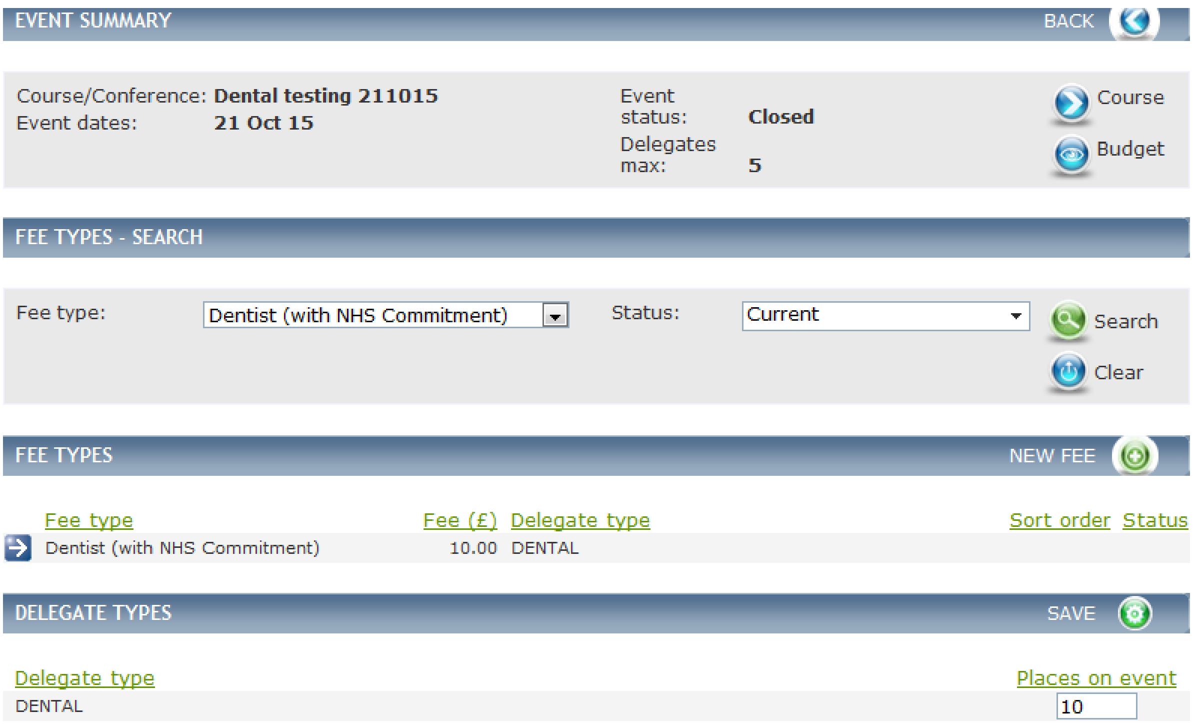
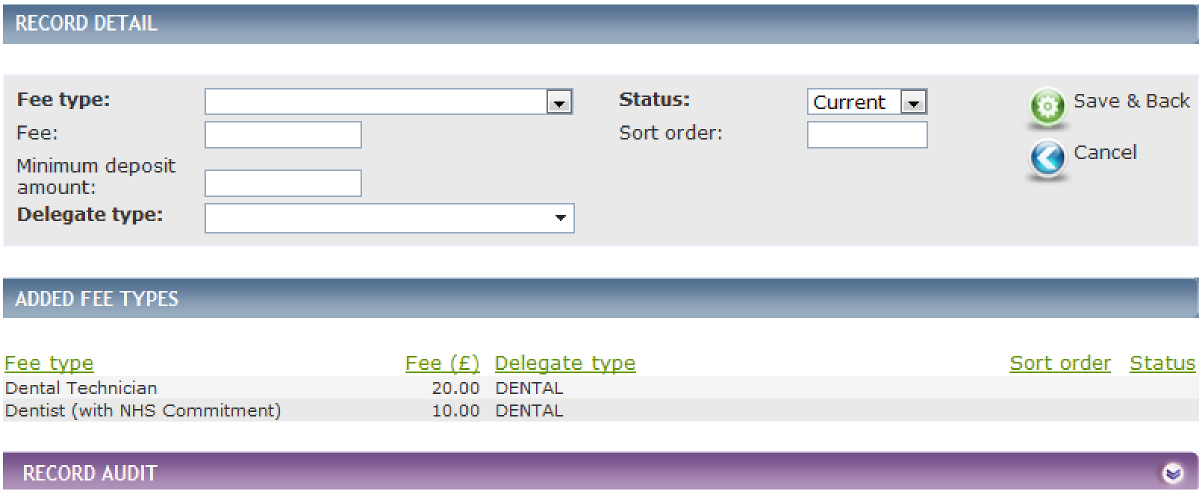


Fig 4.7 Event – fees& delegate types screen

Please note that the number of places on the event will be the maximum number of places available.



The above image illustrates where there is more than one fee type against the one delegate type.

8.5 Requirements

Requirements are any things that the delegates are required to do for the Event. These, and the Requirements added to the Course in which this Event is contained, are displayed to the delegate under the Requirements Tab.

To add a new Requirement, from the **Event Data** left hand menu, click **Requirements**.

The **Event – Requirements** screen is displayed.

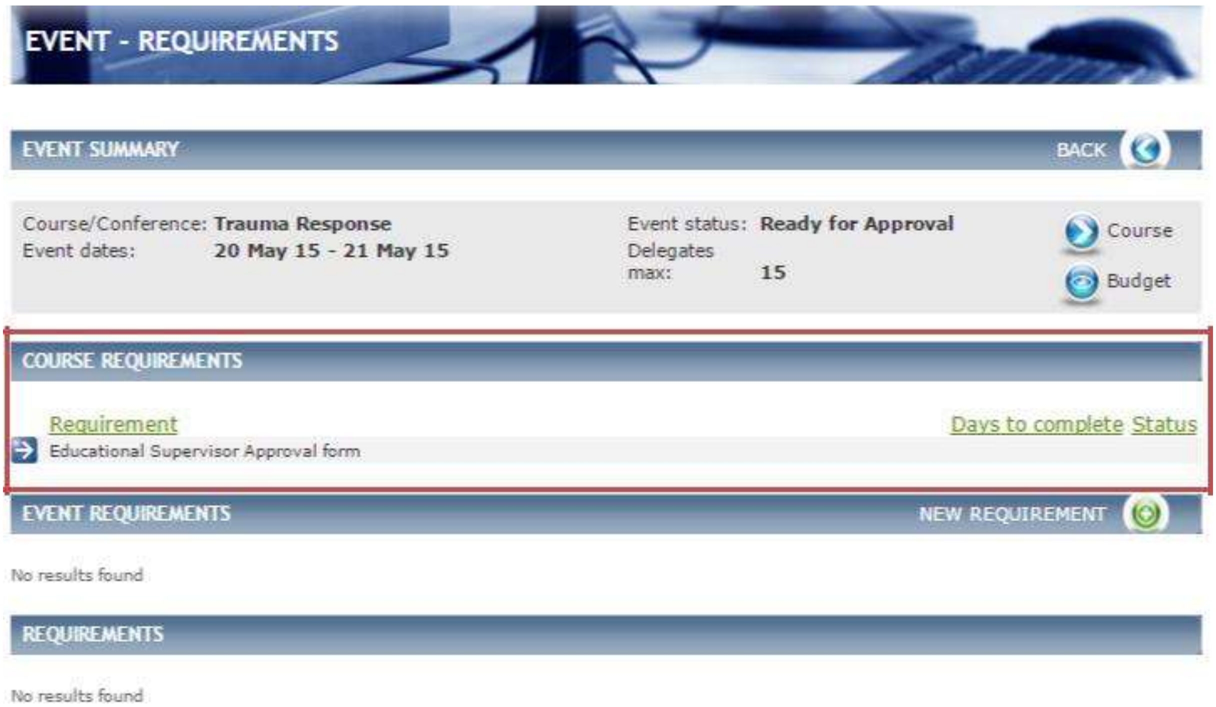


Fig 4.8 Event – requirements screen

Within the Course Requirements section, you can see that this has populated with a Requirement, in the area outlined in red in Fig 4.8 above, as one has been added to the Course it will be inherited by the Event.

To add a new Requirement, click on **New Requirement.**

The **Event – Requirement Detail** screen is displayed.

Fig 4.9 Event – Requirement detail screen

Select a **Requirement** from the drop down. (Populated via reference table Course – Requirement) Requests for a requirement option not on the drop down menu need to be emailed to the Dental Data Administrator.

If the requirement has a number of **Days to complete** these will be displayed here. (Requirements are added within the reference table – Booking- Requirement.

Click **Save & Back.**

You are returned to the Requirement list screen, where you will see that your Requirement has been added.

8.6 Event Options

If an Event has additional Options available to delegates such as lunch, parking permit, they can be added as an Event Option and given a date and price. Delegates can book the Event Options along with their place on the Event.

To add a new Event Option from the **Event Data** left hand menu click on **Event Options.**

The **Event – Event Options** screen is displayed.

Fig 4.12 Event - event options screen

If any Event Options have already been added they will appear in the bottom half of the screen, in the area outlined in red in Fig 4.12 above.

To add a new event option click on **New Event Option.**

The **Event- Event Option Detail** screen is displayed.

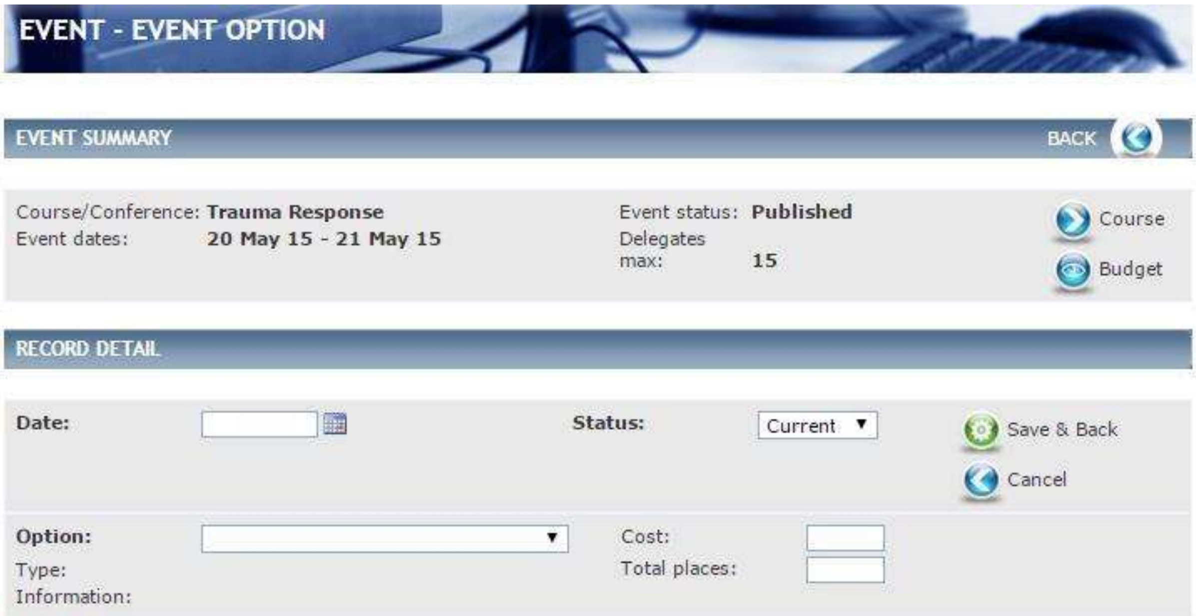


Fig 4.13 Event- event option detail screen

Complete the details as follows:

- Enter the **Date, Cost** and **Total places,** this will be displayed to the delegate when they book onto an Event.
- Select an **Option** from the drop down (populated from reference table Event – Event Option)

Note, Type Information will populate once an Option is selected if information had been added when creating the Event Option in the reference table.

Click **Save & Back.**

You are returned to the Event Options list screen, where you will see that your Event Option has been added.

8.7 Target Audience

Target Audiences are defined when creating a Course. Target Audience must be added to a Course in order to add it to an Event. Administrators can select Target Audiences, which are specified in the Course.

The Target Audience is displayed to delegates in Event details, along with any Target Audience on the course within the Target Audience Tab.

If you add the target audience to the course, and then create the event, all the target audiences for the course are auto added to the event. But, if you later add another target audience to the course, it is not auto added to existing events

To add a new Target Audience from the **Event Data** left hand menu click on **Target Audience.**

The **Event – Target Audience** screen is displayed.

Fig 4.14 Event – target audience screen

The Target Audience has defaulted to Surgeon in the area outlined in red in Fig 4.14 above. Target Audiences are defined in the Course and inherited to the Events.

To add a new Target Audience click on **New Target Audience**

The **Event- Target Audience** screen is displayed.

Fig 4.15 Event- target audience screen

Select the **Target Audience** from the drop down (contains only Target Audiences that have been added to the Course in which this Event has been placed, that have not yet been added to this Event), and click **Save & Back.**

Note: If there are no options to select within the drop-down it is because they have not been added to the Course.

You are returned to the Target Audience list screen, where you will see that your Target Audience has been added.

8.8 Accommodation

New accommodation can be added along with the cost. Delegates can book Accommodation when booking the Event via the book now tab.

To add a new Accommodation from the **Event Data** left hand menu click on **Accommodation.**

The **Event – Accommodations Options** screen is displayed.

Fig 4.16 Event – accommodations options screen

If any Accommodation has already been added they will appear in the bottom half of the screen, in the area outlined in red in Fig 4.16 above.

To add a new Accommodation click on **New Accommodation.**

The **Event – Accommodation Detail** screen is displayed.

Fig 4.17 Event – accommodation detail screen

Complete the details as follows:

- Enter the **Date** the Accommodation is available.
- Select the **Venue** from the drop down. (populated from reference table Event – Event Options)

Note: Information will populate when a Venue is selected if information was added when creating the Event Option in the reference table Event – Event Option.

- Enter the **Cost** (this can be 0 if you are offering Accommodation free of charge) **associated to the Accommodation** and **Total places** available.

Click **Save & Back.**

You are returned to the Accommodation list screen, where you will see that your Accommodation has been added.

Note: you can only add Accommodation if the Accommodation checkbox is ticked in the Course details and the Event details for this event**.** See section 4.2.6.

8.9 Documents

You can add Documents relating to the Event. Displayed to delegates in event details within the Document Tab.

From the **Event Data** left hand menu click on **Documents.**

The **Event – Documents** screen is displayed.

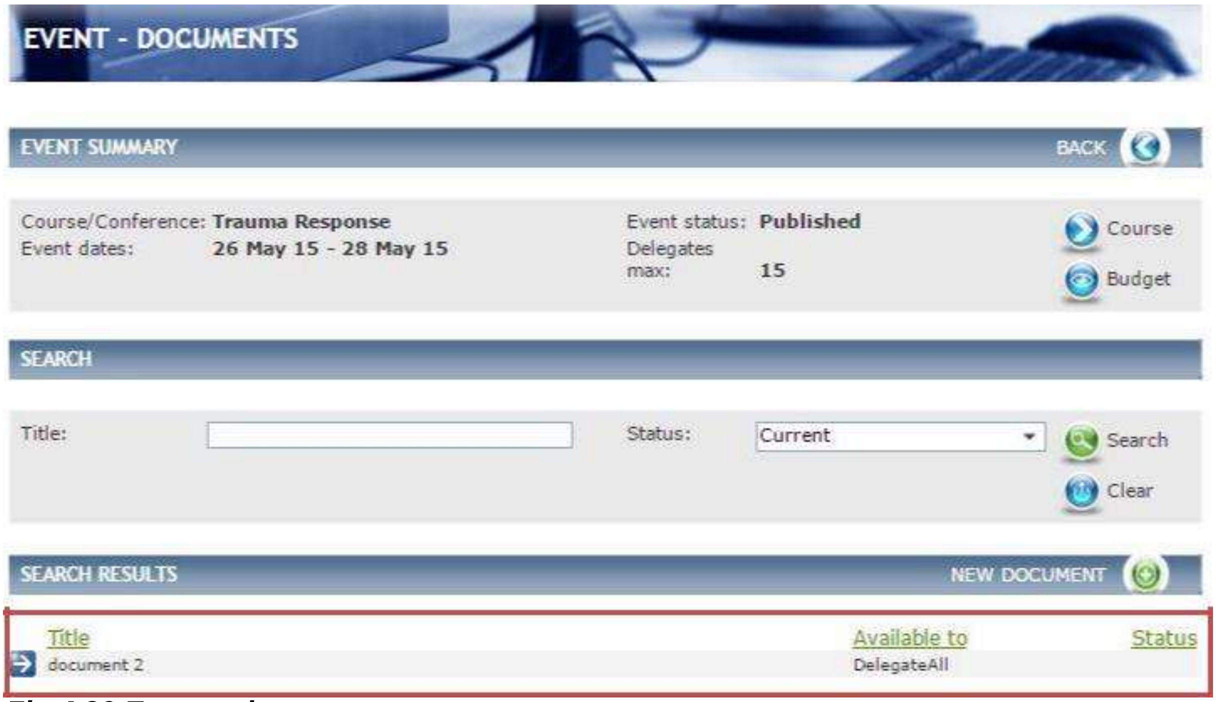


Fig 4.20 Event – documents screen

If any Documents have already been added they will appear in the bottom half of the screen, in the area outlined in red in Fig 4.20 above.

To add a new Document, click on **New Document.**

The **Event – Document Detail** screen is displayed.

Fig 4.21 Course – document detail screen

Complete the details as follows:

- Enter a **Title, Description** and an **Order** of the Document if relevant. The order will sort the list of Documents displayed to the delegate in the Document tab.
- Select who is able to see this Document by clicking in the relevant tick box(s) **in Available to** o If you select **Administrator** the Document will only be held against the course and not
- visible to delegates.
- If you select **Delegate (all)** then the Document will be visible to any delegate who views the Course
- If you select **Delegate (attending)** the Document will only become visible once they have booked onto an Event.
- If you select **Everyone** the Document is visible to all.
- Upload the Document by clicking on **Choose file** in the **Location** field.

You are returned to the Document list screen, where you will see that your Document has been added.

<u>Speaker Contract</u>

It is a requirement as part of the bids process that speaker contracts for each event are uploaded to the documents section of the event to be validated by HEEoE. Please ensure when uploading the document (in pdf format) that it is only available to **Administrator.**

8.10 Ad-Hoc Finance

Incomes and Expenses can be added directly against an Event using the Ad-hoc finance sub-menu.

8.11 Expense (BIDS)

This is where the expenses for the bids will be entered. This section replaces the ‘Estimated finance’ section in V1. Please ensure that all bids requests are entered here as per the below.

To add a new Expense from the **Event Data** left hand menu click on **Ad-Hoc Finance.**

The **Event – Finance** screen is displayed.

Fig 4.22 Event – finance screen

If any Expenses have already been added they will appear in the bottom half of the screen.

Click on **New Record.**

The **Event –Finance Detail** screen is displayed.

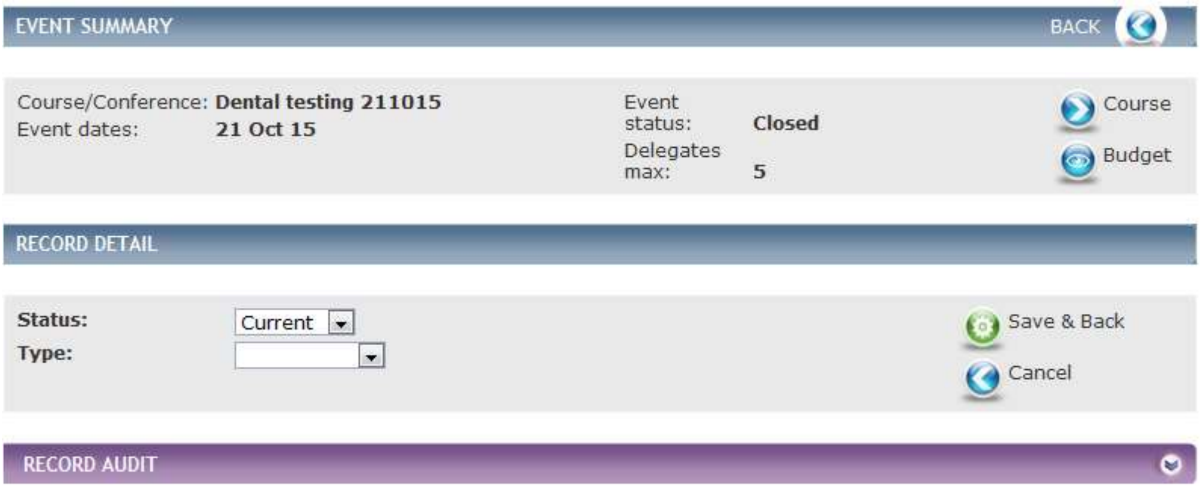


Fig 4.23 The event –finance detail screen

Select the **Type to Expense,** on doing so more fields will populate see Fig 4.24 below.

The **Event – Finance Expense screen** is displayed.

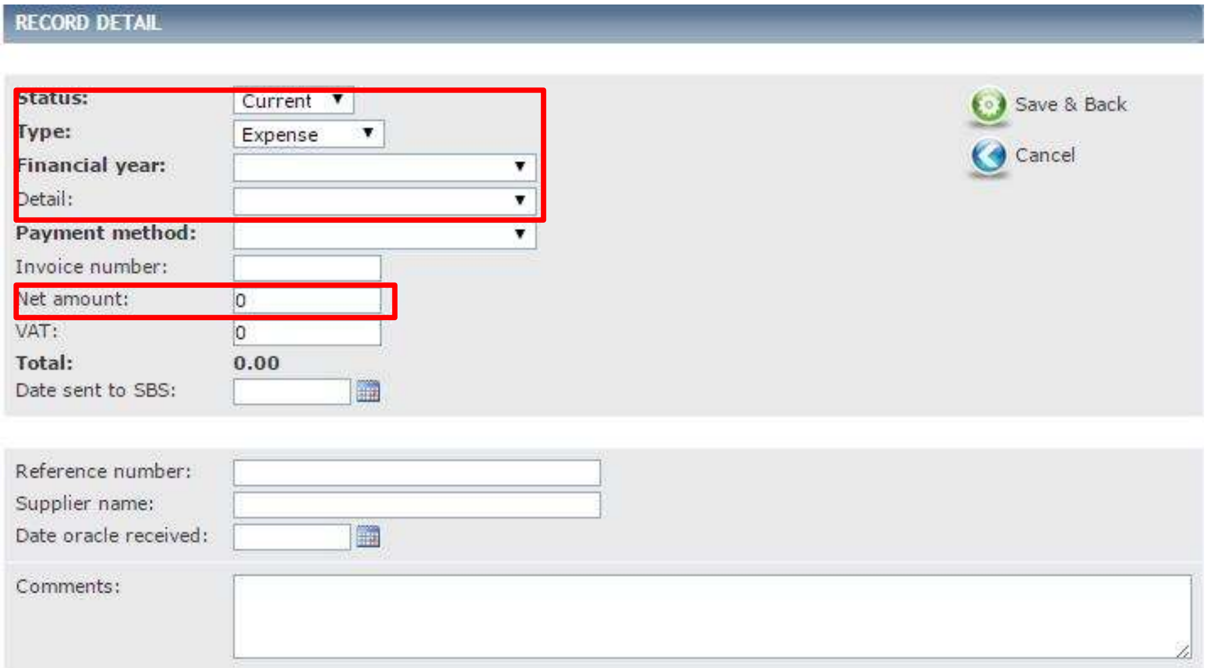


Fig 4.24 Event – finance expense screen (Please note that only the fields in red above are mandatory.)

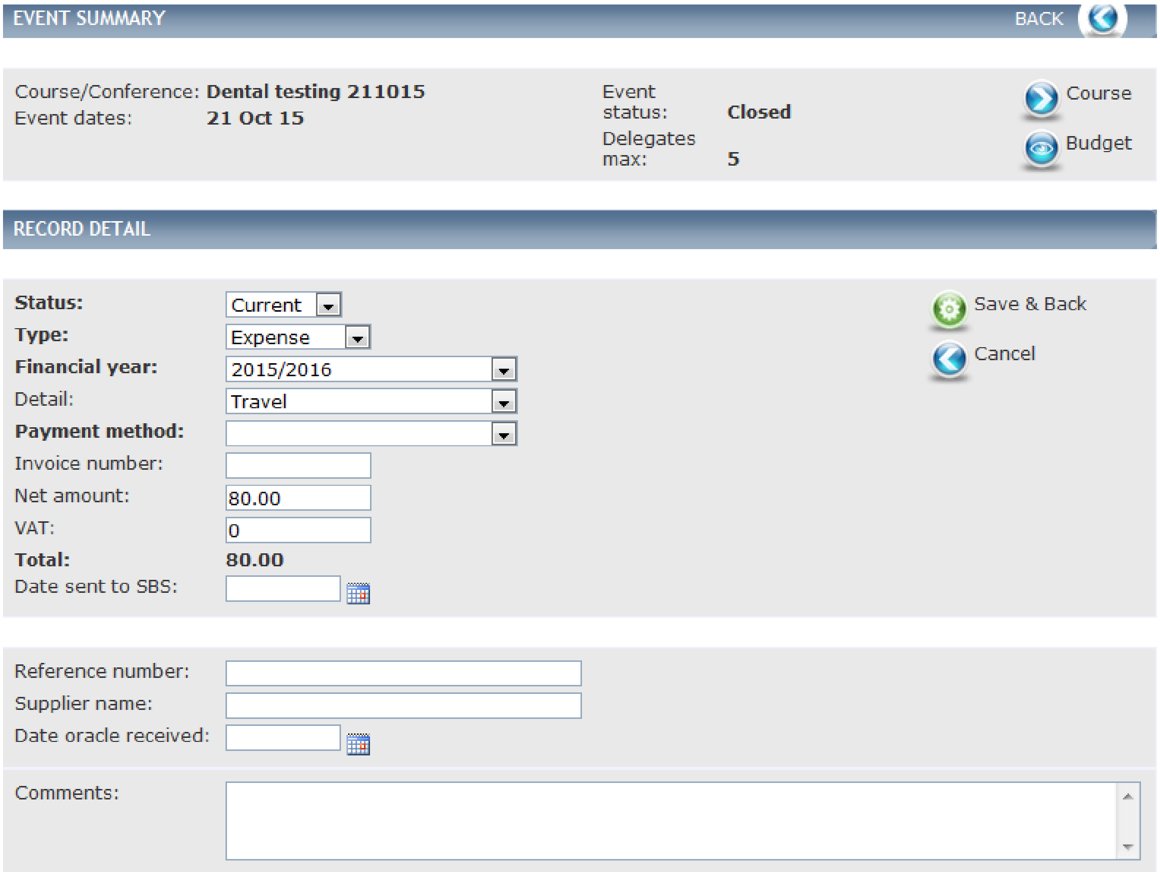
Complete the details as follows:

Select the following:

- **Financial year** (populated from reference table Finance – Financial Year)
- **Detail** i.e. Lecture Fee, LOE, Travel (populated from reference table Finance – Detail Type).
- **Payment method** (populated from reference table Finance – Payment method). Enter the following details:
  Invoice number, Net, VAT and **Total amounts** and the **Date sent to SBS.**
  Reference number, **Supplier name** and **Date oracle received**.
  Enter any additional **Comments** that relate to this expense.

Click **Save & Back.**

You are returned to the Event Finance list screen, where you will see that your Event Expense has been added.



8.12 Income

You can add an income figure here which will be the income expected to be generated from the course.

To add a new Income from the **Event Data** left hand menu click on **Ad-Hoc Finance**.

The **Event – Finance** screen is displayed.

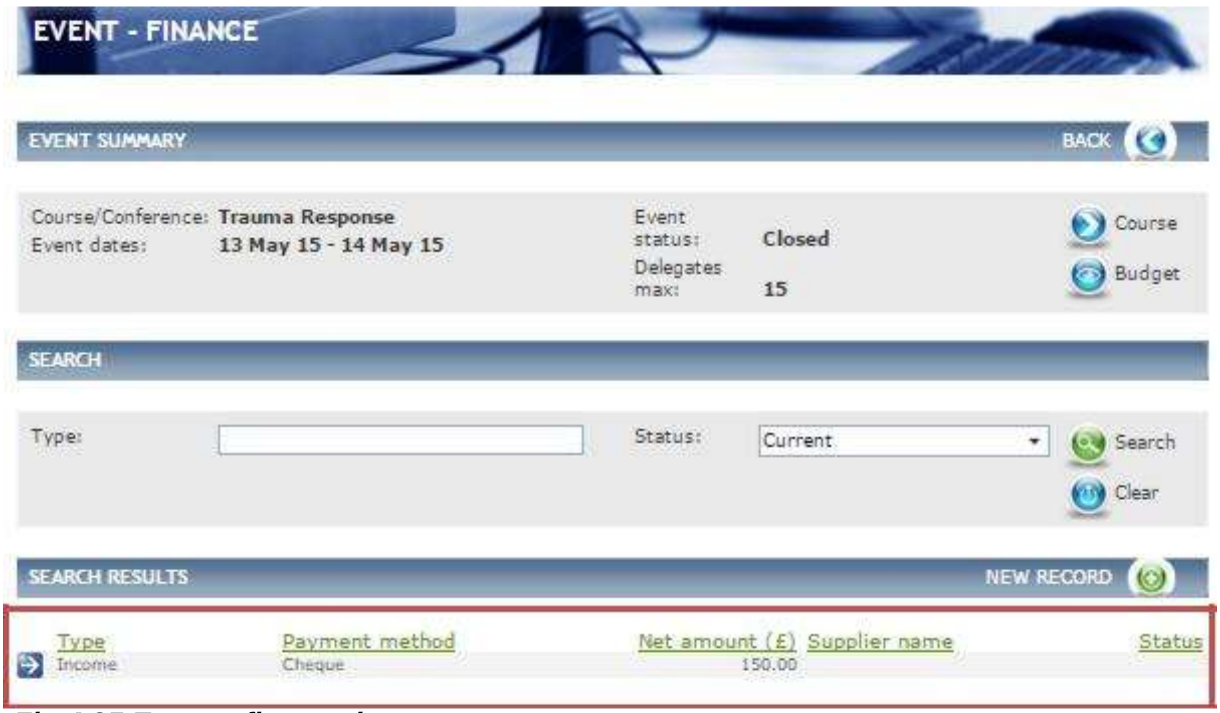


Fig 4.25 Event – finance income screen

If any Income records have already been added they will appear in the bottom half of the screen, in the area outlined in red in Fig 4.25 Event – finance income screen above.

Click on **New Record.**

The **Event –Finance Detail** screen is displayed.

Select the **Type** to **Income**, on doing so more fields will populate see Fig 4.27 Event – finance income screen below.

The **Event – Finance Income** screen is displayed.

Fig 4.26 The event –finance detail screen

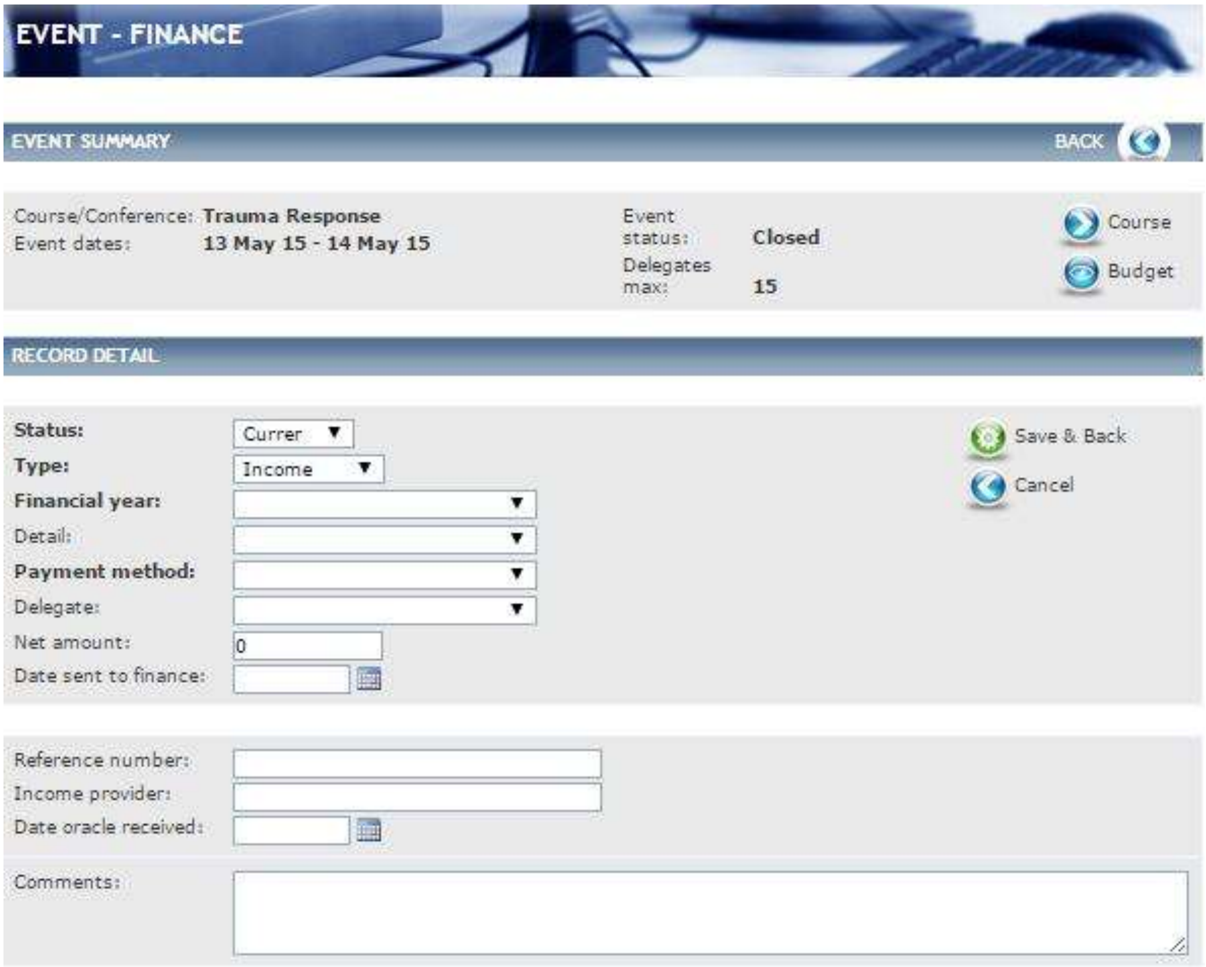


Fig 4.27 Event – finance income screen

Complete the details as follows:

Select the following:

- **Financial year** (populated from reference table Finance – Financial Year).
- **Detail** i.e. delegate fees (populated from reference table Finance – Detail Type).
- **Payment method** (populated from reference table Finance – Payment method). Enter the following details:
- **Net amount** and **Date sent to finance.**
- **Reference number**, **Income provider** and **Date oracle received**.
- Enter any additional **Comments** that relate to this expense.

Click **Save & Back.**

You are returned to the Event Finance list screen, where you will see that your Event Income has been added.

8.13 Notes

This section allows Notes to be made against an Event record.

From the **Event Data** left hand menu click on **Notes.**

The **Event – Note** screen is displayed.

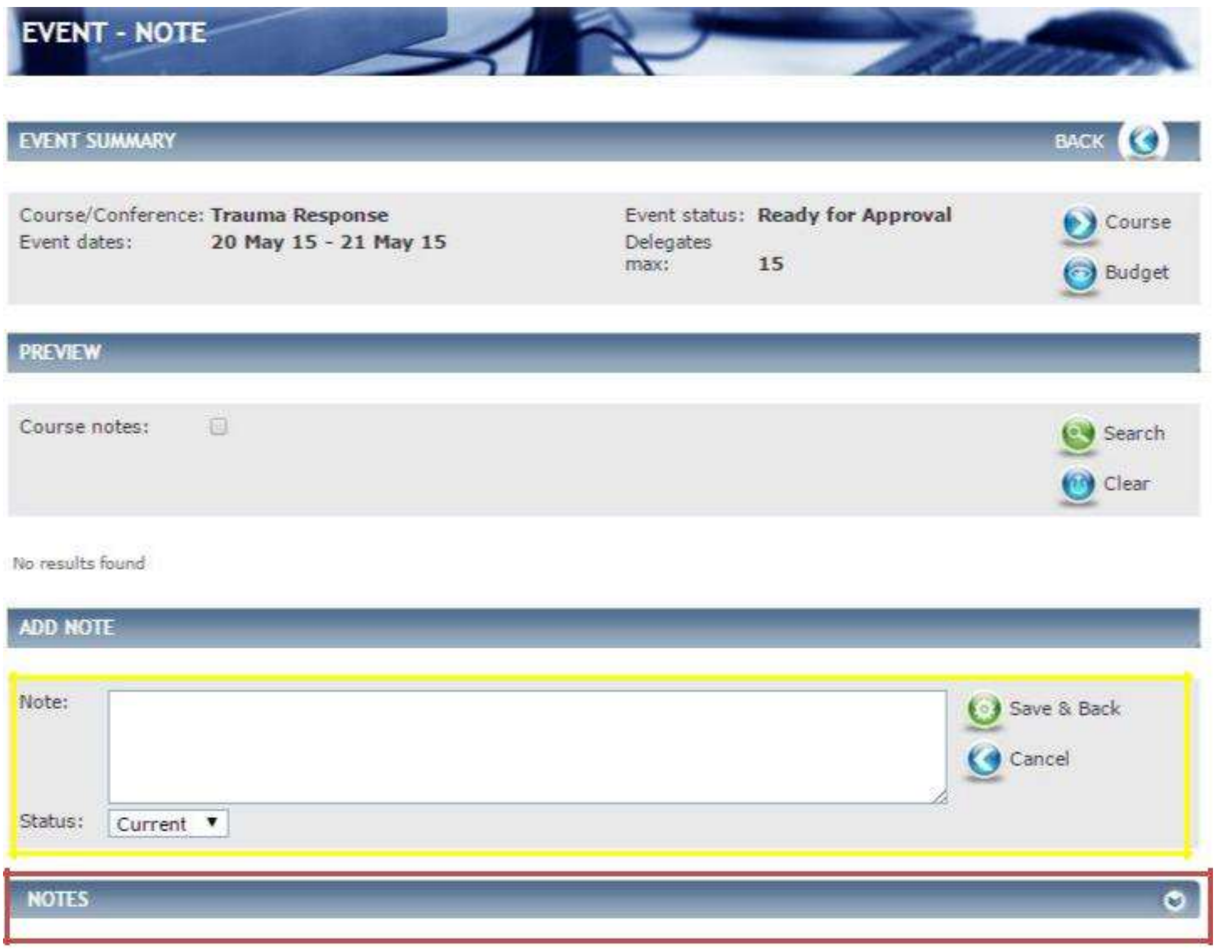


Fig 4.32 Event – note screen

If any Notes have already been added they will appear in the bottom half of the screen if you expand the chevrons in the header bar, in the area outlined in red in Fig 4.32 above and within the preview section.

Note, by clicking in the square tick-box next to **Course notes**, this page will display Notes that have been added to the Course as well as any Notes added to the Event.

To create a new Note Enter a **Note** in the area outlined in yellow in Fig 4.32 above, and click Save & Back to store your Note.

You are returned to the Note list screen, where you will see that your Note has been added.

9 System Maintenance

There are two ways in which you can search for a Course/Conference, from the left-hand menu and from the home screen.

9.1 Finding an Existing Course - Left-hand menu

From the **Data Entry** menu on the left-hand side select **Courses/Conferences.**

The **Courses** screen is displayed.

Fig 3.30 Course screen

From here, use the search criteria to find the Course/Conference. Once you have found the Course/Conference click on the blue-arrow to view.

9.2 Finding an Existing Course - Home screen

From the home screen click on **My Courses,** the field will expand showing all Course/Conferences that you are set as the owning Administrator.

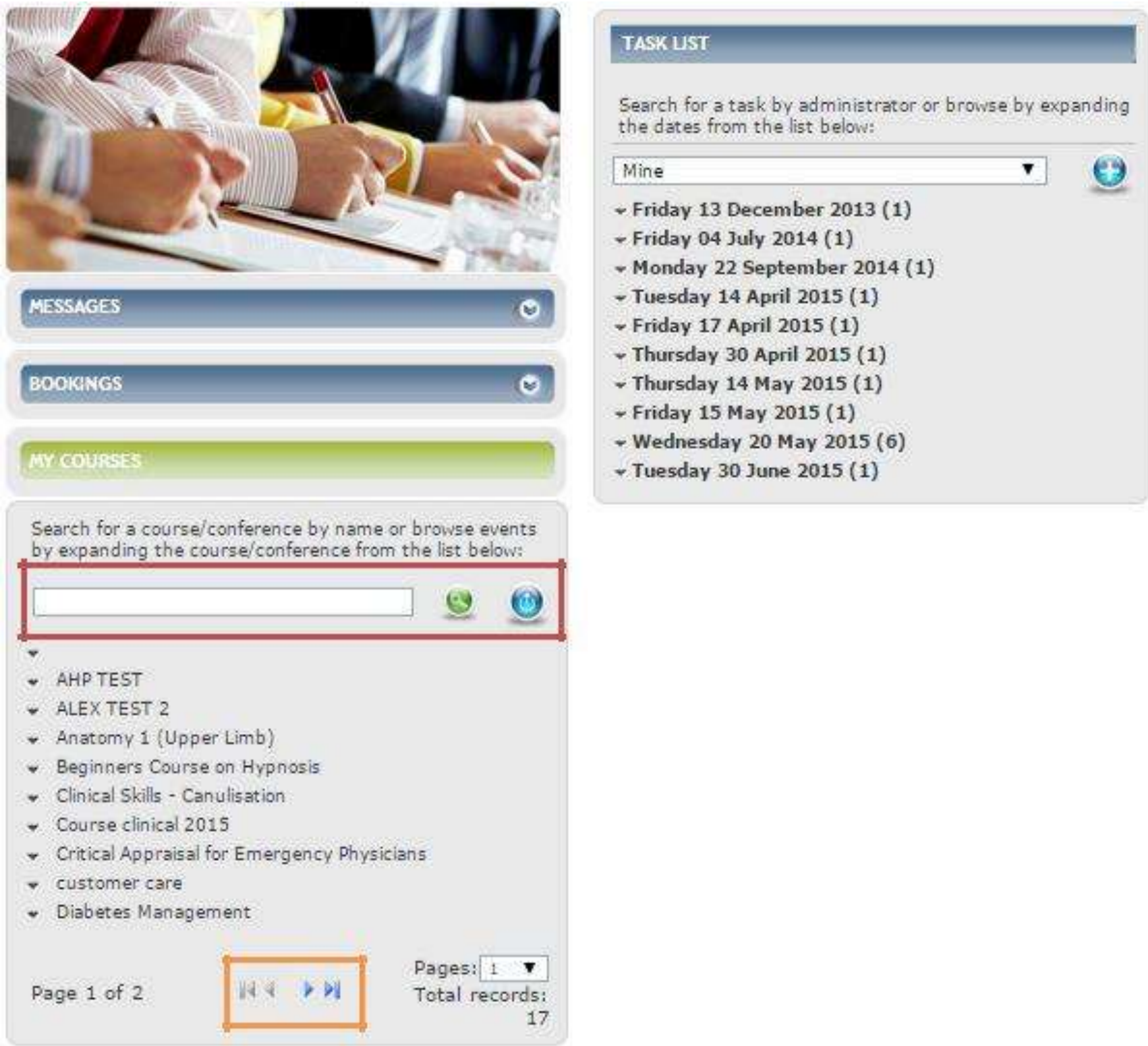


Fig 3.31 CBMS home screen

From here you can search for a Course/Conference in the following ways:

- Enter the Course/Conference name in the area outlined in red in Fig 3.31 above and click on the **green magnifying glasses** icon.
- Scroll through the list of Course/Conferences by clicking on the forward and backward arrows outlined in the area in orange in Fig 3.31 above.

9.3 Copying an Existing Course

Functionality is available to copy an existing course, described below. When you copy a course, the following details are copied:

Course/Conference	Delegates min
Status	Delegates max
Co-ordinator	Waiting list
Category	Information only
Room type	Issue certificate
Evaluation	Accommodation
Created date	Display programme
Length	Hands on
Teamwork	Core Subject
Course aims	Course Learning outcomes
Information	

To copy an existing Course within the **Date Entry** menu click on **Courses/Conference.**

The **Courses** screen is displayed.

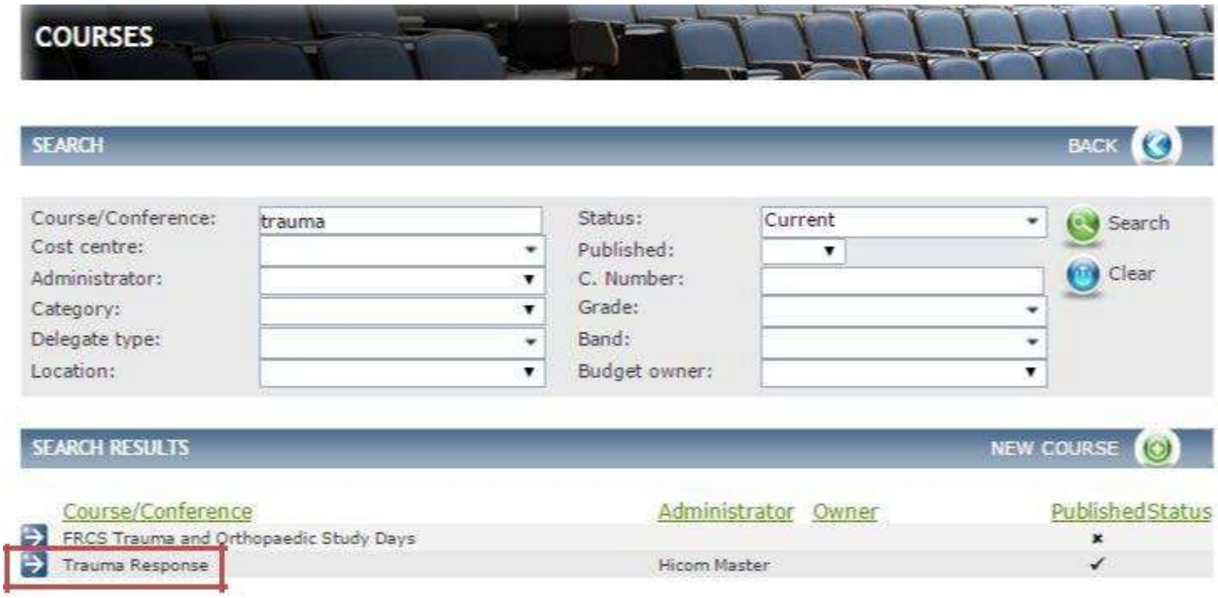


Fig 3.32 Courses screen

Search for the Course/Conference by using the search filters. Once you have found the Course that you wish to Copy. Click on the **blue-arrow** as outlined in red in Fig 3.32 above.

The **Course Detail** screen is displayed

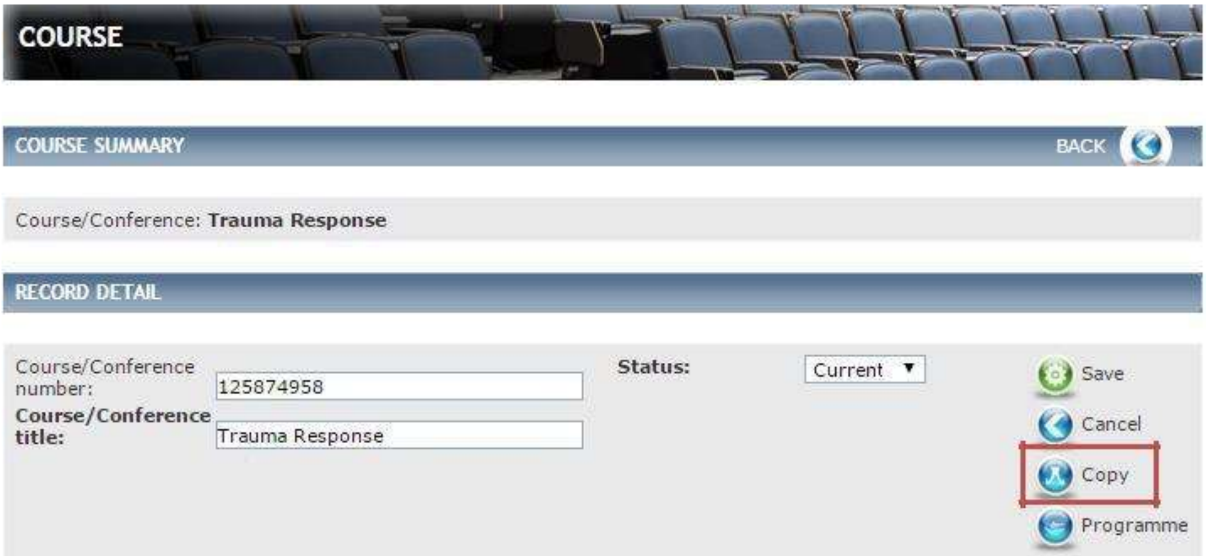


Fig 3.33 Course detail screen

Click on **Copy**, as outlined in the area in red in Fig 3.33 above.

A pop-up will display confirming that you are about to create a copy of this Course. Click on **Ok** or **Cancel.**

- If you Select OK another pop-up is displayed Fig 3.34 below.

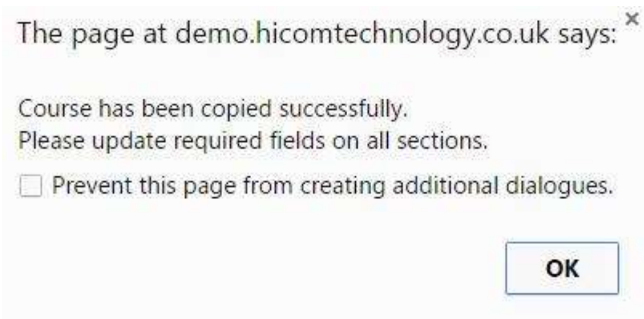


Fig 3.34 Pop up successfully copied

Click on **OK**

You are returned to the Course screen where you can make changes to any of the fields and enter other relevant information. Please refer to section 3.2 for more information on updating your new Course/Conference.

Click **Save**

Note: If you do not rename the Course it will default to the previous course name with the word copy in the title.

9.4 Deleting a Course

You will never be able to permanently delete a Course from the system. As an administrator, you can still search for a deleted Course by selecting delete in the status field in the area outlined in red in Fig 3.35 below. Deleted Courses are never displayed to delegates.

To delete an existing Course within the **Data Entry** menu click on **Courses/Conference**.

The **Courses** screen is displayed.

Fig 3.35 Courses screen

Search for the Course/Conference by using the search filters, once you have found the Course that you wish to delete. Click on the blue-arrow as outlined in orange in Fig 3.35 above.

The **Course Detail** screen is displayed.

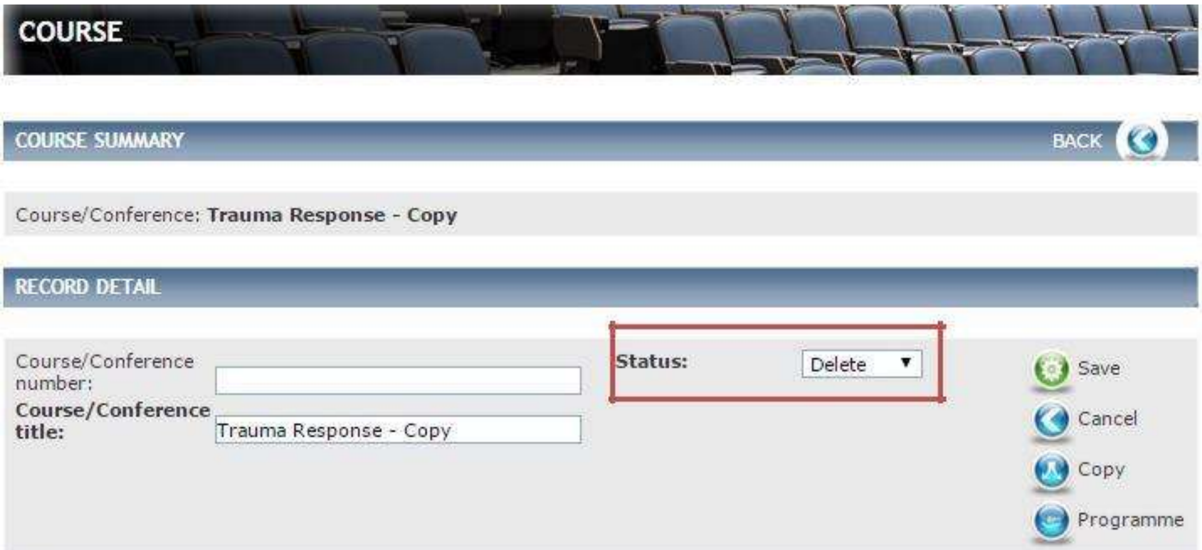


Fig 3.36 Course detail screen

Select **Delete** in the **Status** field as outlined in red in Fig 3.36 above. Click on **Save.**

9.5 Delegates and Batch Attendance

Functionality is available to mark delegates attendance in batch, please refer to Managing Bookings section 10.

9.6 Finding an existing Event

Within the **Data Entry** menu select **Events.**

The **Events** screen is displayed.

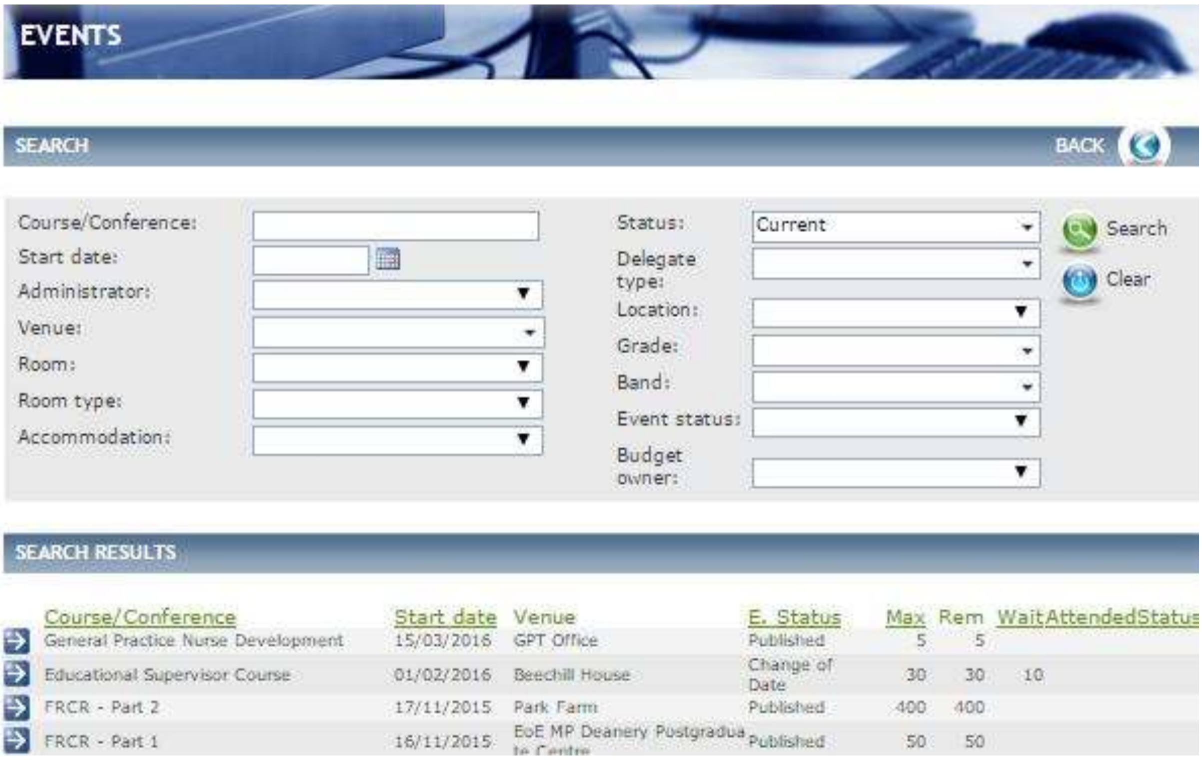


Fig 4.33 Events screen

From this screen you can:

Use the **Search** criteria's to find an Event.
Within **Search results** see a list of all current Events.

9.7 Copying an Existing Event

Functionality is available to copy an existing Event, as described below.

The majority of the information will be copied across including all the additional options such as, Requirement, Event options etc.

The fields that will **not** Copy over are as follows:

- Start date
- End date
- Time
- Event status
- Budget
- Accommodation
- Delegates

To Copy an existing Event within the **Date Entry** menu click on **Events.**

The **Event** screen is displayed.

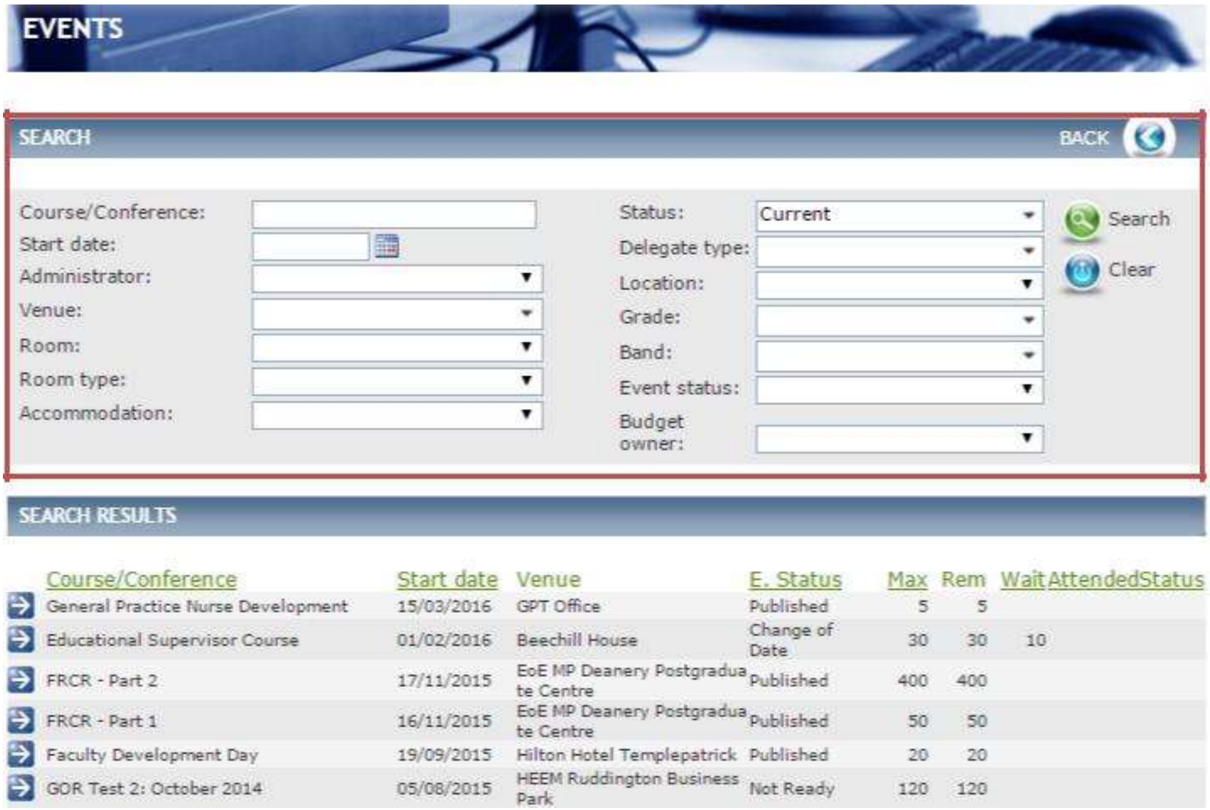


Fig 4.34 Event screen

You can use the Search for the Event that you wish to Copy by using the search filters in the area outlined in red in Fig 4.34 above.

Click on the blue-arrow against the event you wish to copy.

The **Event Detail** screen is displayed.

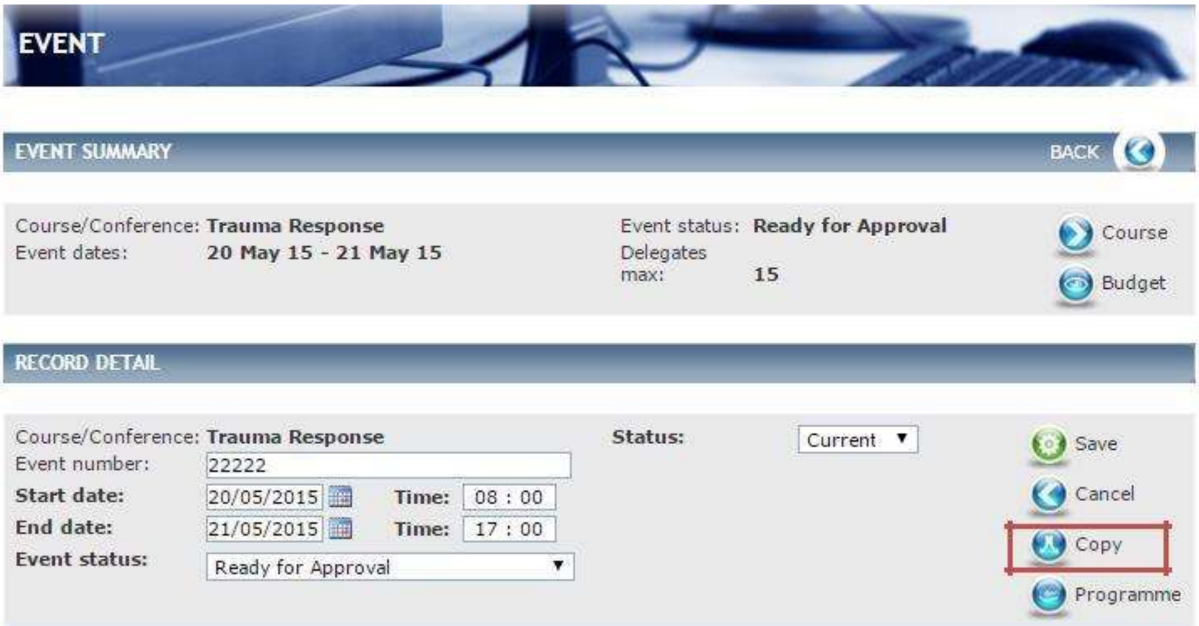


Fig 4.35 Event detail screen

Click on **Copy** in the area outlined in red in Fig 4.35 above.

A pop-up will display confirming that you are about to create a Copy of this Event do you wish to proceed? Click on **Ok** or **Cancel.**

If you click on **OK.**

Another pop-up will display see Fig 4.36 below.

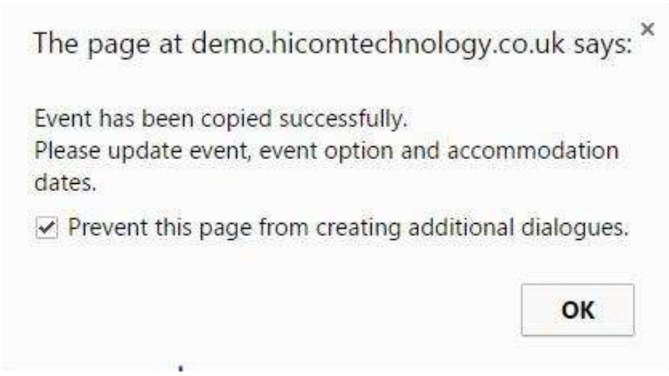


Fig 4.36 Pop-up event copied successfully

Click **Ok**

The **Event summary** screen is displayed.

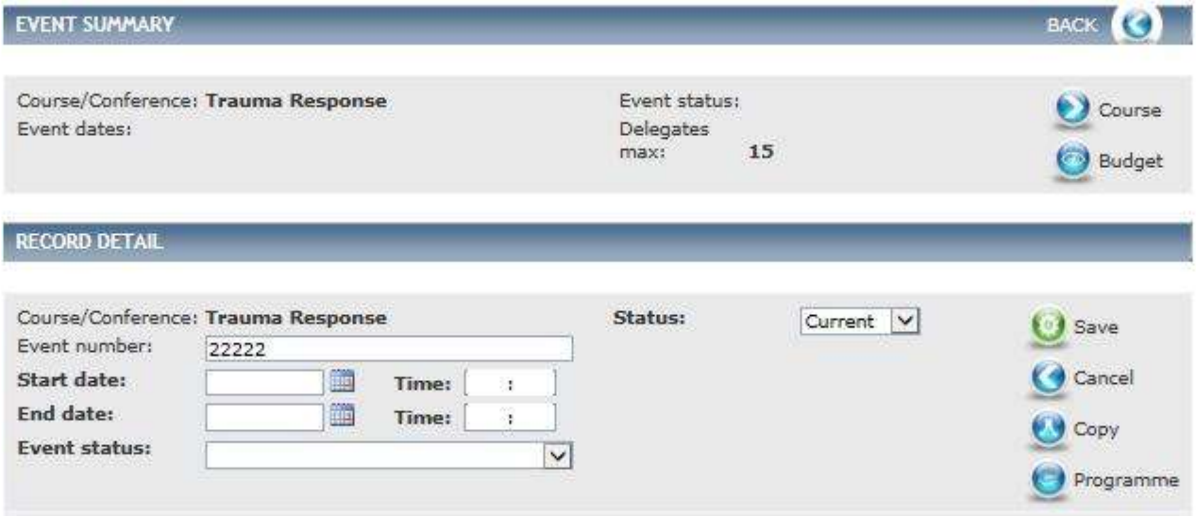


Fig 4.37 Event summary screen

Enter the details required, along with any other additional information you wish to add to this particular Event.

Click **Save.**

9.8 Deleting an Event

You will never be able to permanently delete an Event from the system. As an administrator, you can still search for a deleted Course by selecting Delete in the status field within the search filters. Deleted Events are never displayed to delegates.

Find the Event you wish to delete by following the instructions in section 4.4.

Fig 4.38 Event screen

From the Event summary screen Fig 4.38 above**.**

Select the **Status** to **Delete,** in the area outlined in red in Fig 4.38 above, and click on **Save.**

10 Managing Bookings

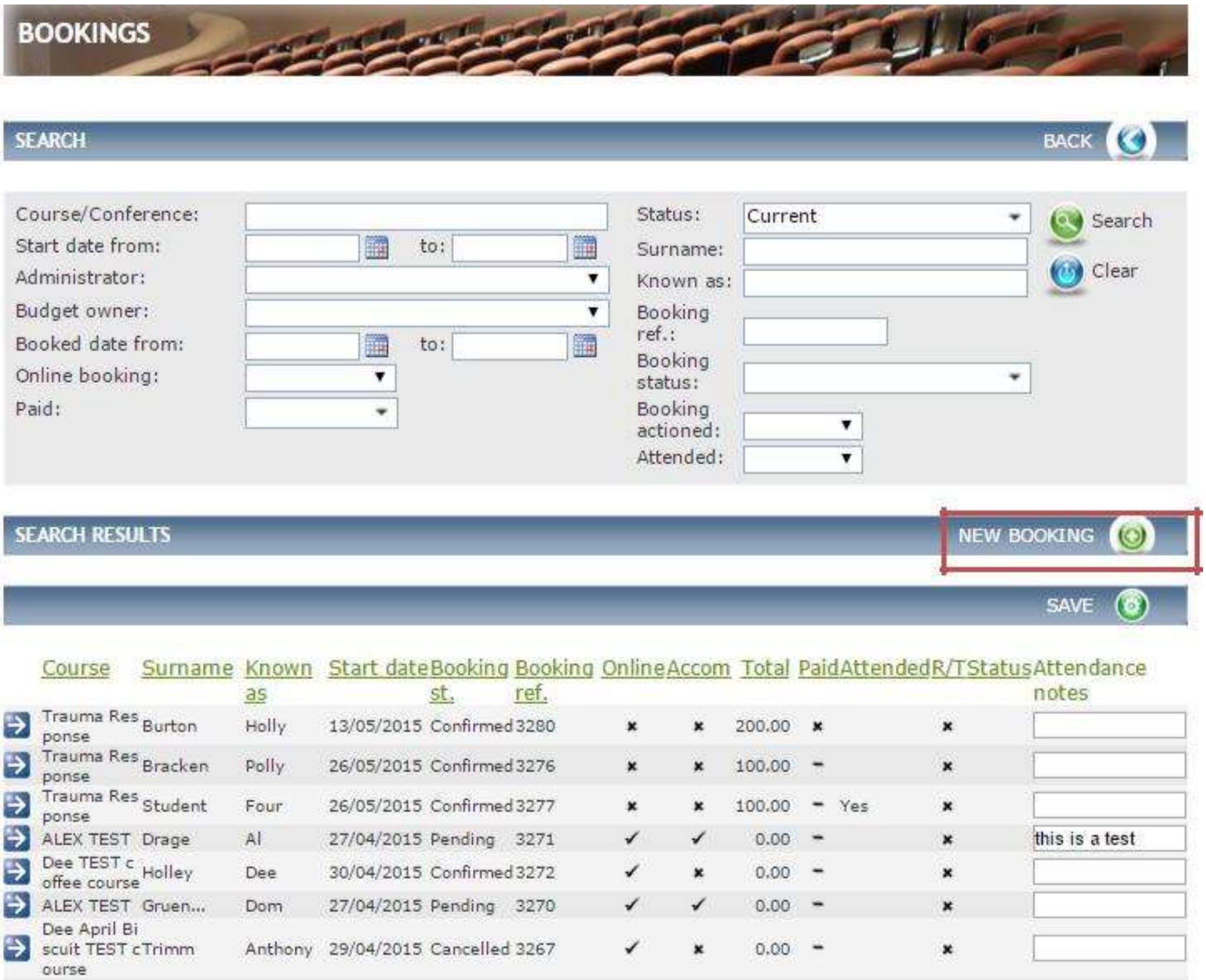
A Booking is an instance of a delegate either booking a place against a course, or showing an interest.

There are two ways to access the list of bookings:

1. Via the Bookings list screen found from Data Entry (this shows delegates for all Events you have access to)
2. By clicking on Delegates within an Event (this will show only delegates for that Event)

To access Bookings within the **Data Entry** menu on the left-hand side click on **Bookings.**

The **Booking** screen is displayed.



Course	Surname	Known as	Start date	Booking st.	Booking ref.	Online	Accom	Total	Paid	Attended	R/T	Status	Attendance notes
Trauma Response	Burton	Holly	13/05/2015	Confirmed	3280	✗	✗	200.00	✗		✗		
Trauma Response	Bracken	Polly	26/05/2015	Confirmed	3276	✗	✗	100.00	-		✗		
Trauma Response	Student	Four	26/05/2015	Confirmed	3277	✗	✗	100.00	-	Yes	✗		
ALEX TEST	Drage	Al	27/04/2015	Pending	3271	✓	✓	0.00	-		✗		this is a test
Dee TEST coffee course	Holley	Dee	30/04/2015	Confirmed	3272	✓	✗	0.00	-		✗		
ALEX TEST	Gruen...	Dom	27/04/2015	Pending	3270	✓	✓	0.00	-		✗		
Dee April Biscuit TEST course	cTrimm	Anthony	29/04/2015	Cancelled	3267	✓	✗	0.00	-		✗		

Fig 5.1 Booking screen

From this screen you can:

- **Search** for Bookings using the search filters to narrow results down Under the **Search Result** header see all Bookings
- Create a **New Booking**

10.1 Adding a Delegate to an Event

There are 2 ways to add a new delegate:

1. Via the Bookings list screen found from Data Entry (this shows delegates for all Events you have access to)
2. By clicking on Delegates within an Event and New delegates

The screen is the same on either option apart from via the Event the event details will populate. To create a New Booking, select **New Booking** in the area outlined in red in Fig 5.1 above. The **Booking Detail** screen is displayed.

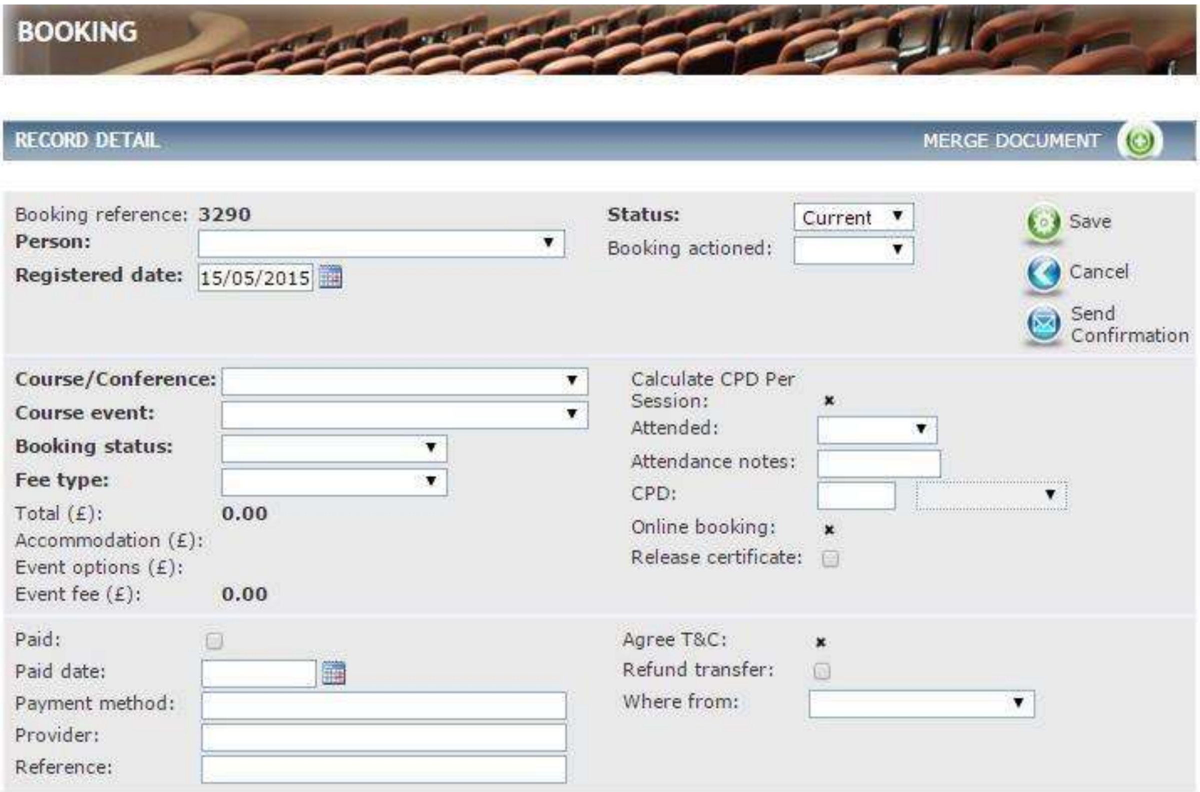


Fig 5.2 Booking detail screen

Complete the details as follows:

- Select the **Person**, **Course/Conference**, **Course event**, **Booking status** (populated from reference table Booking- Booking Status) and **Fee type.** (Populated from reference table Event – Fee type)
- If Payment had been made for the Booking select **Paid** and enter a **Paid date**, **Payment method**, **Provider** and **Reference.**
- Select **Refund transfer** and **Where from** (populated from reference table Booking-where from) this is information recording only.

Click on **Save.**

In addition, after the Event has taken place you can select **Attended** and add any **Attendance notes** if applicable.

Please remember once a delegate has attended an event, to trigger the release of the evaluation the following criteria must be met:

- Event date has passed
- Delegate booking is marked as confirmed and paid
- The Evaluation has been linked to the Course or Event
- Delegate is marked as attended

Note: Total, Accommodation, Event options, Event fee and Calculate CPD Per Session will automatically calculate from the Event details.

10.2 Managing Delegate Requirements

Once you have booked a delegate on the Event you can manage any Requirements that where set out in the Event/Course.

Locate the Delegate to which you want to manage Requirements for.

From the Booking summary click on **Requirements** from the left-hand

menu. The **Booking – Requirements** screen is displayed.

Fig 5.3 Booking - requirements screen

From this screen you can:

- Navigate to the **Person**, **Event** and **Course** details by clicking on the icons in the area outlined in orange in Fig 5.3 above.

Add a **New Requirement**. See section 4.2.2.

See all **Requirements** outstanding for this delegate, in the area outlined in red in Fig 5.3 above. The x means that they are yet to be received.

To manage the outstanding **Requirement(s)** click on the blue-arrow against the record.

The **Booking-Requirement Detail** screen is displayed.

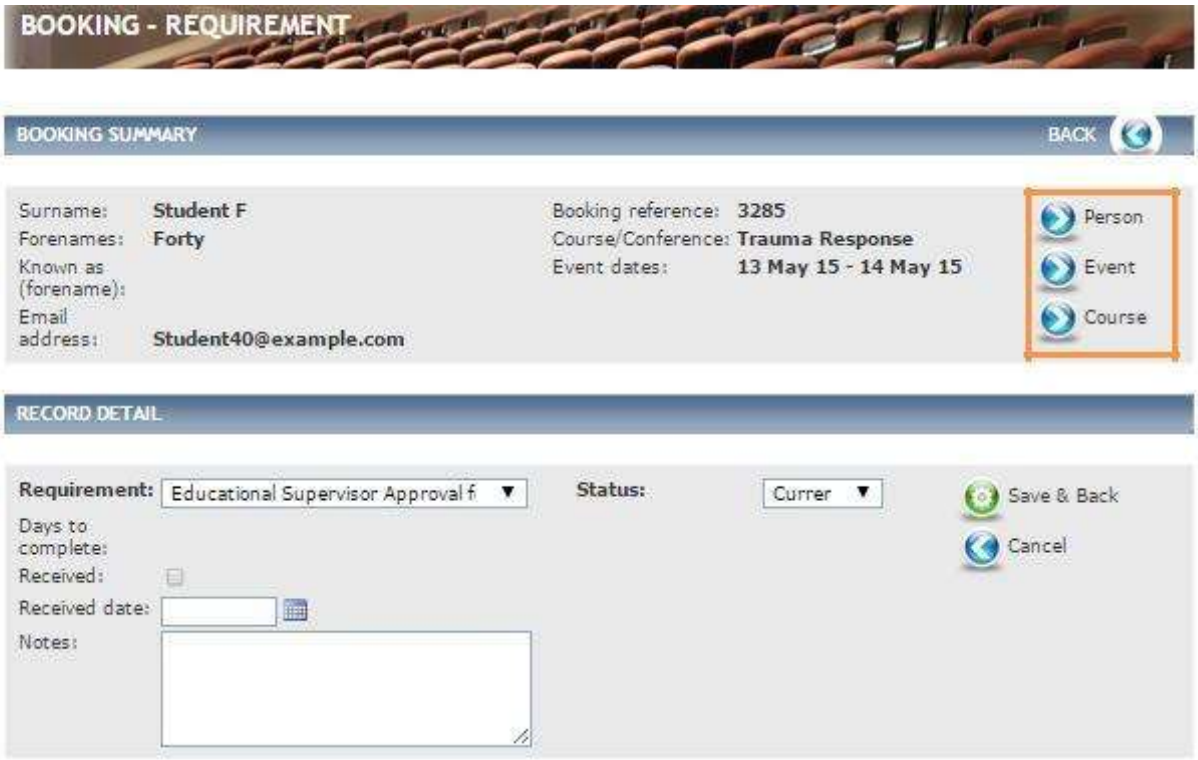


Fig 5.4 Booking-requirement detail

Complete the details as follows:

- Select **Received.**
- Enter **Received date** and any **Notes** if relevant.

Click **Save** & **Back.**

You are returned to the Requirement list screen, where you will see that your Requirement has been updated to received.

Note: You can navigate between, **Person**, **Event** and **Course** by clicking on the icons in the are outlined in orange in Fig 5.1 above.

10.3 Managing Delegate Accommodation

Once you have booked a delegate on to the Event you can manage any Accommodation that where set out in the Event/Course.

Locate the delegate to which you want to manage Accommodation for.

From the Booking summary click on **Accommodation** from the left-hand menu.

The **Booking – Accommodation** screen is displayed.

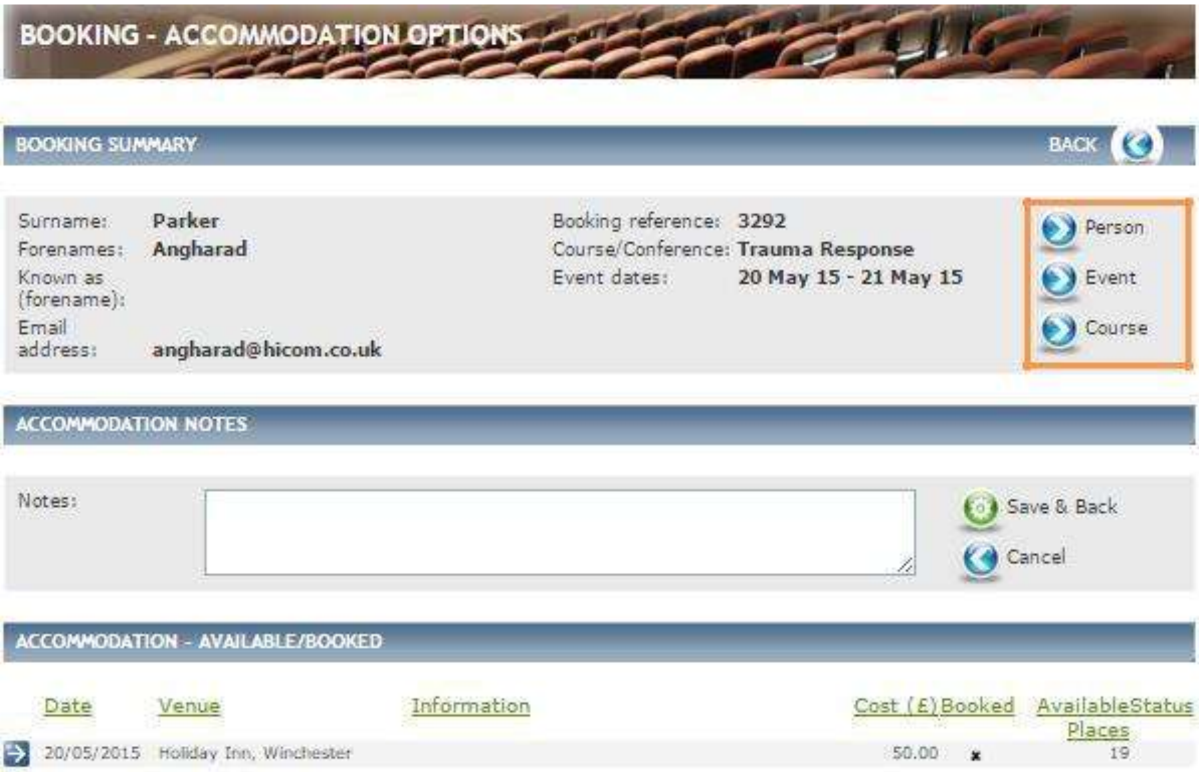


Fig 5.5 Booking – accommodation screen

From this screen you can:

- Navigate to the **Person**, **Event** and **Course** details by clicking on the icons in the area outlined in orange in Fig 5.5 above.
- Add any **Notes** against the Accommodation Booking. Remember to click Save & Back to store your Note.
- Manage the **Accommodation** booking for this delegate. This is for administrate purposes only; it will not connect to any other third party site. It allows for ease of finical record keeping against each individual.

To manage the Accommodation Booking click on the blue-arrow against the record.

The **Booking- Accommodation Detail** screen is displayed.

Fig 5.6 Booking- accommodation detail

To secure the Accommodation Booking click on **Book.** This will automatically update the remaining number of accommodation places available and move the cost within the charges screen on the delegate's record. It will not automatically book the accommodation.

You are returned to the Accommodation detail screen.

10.4 Managing Delegate Event Options

Once you have booked a delegate on the Event you can manage any Event Options that where set out in the Event/Course.

Locate the Delegate to which you want to manage Event options for.

From the Booking summary, click on **Event options** from the left-hand menu.

The **Booking-Event Options** screen is displayed.

Fig 5.7 Booking-event options screen

From this screen you can:

- Navigate to the **Person**, **Event** and **Course** details by clicking on the icons in the area outlined in orange in Fig 5.7 above.
- See all **Event Options** outstanding for this delegate, in the area outlined in red in Fig 5.7 above. The x means that they are yet to be dealt with.

To manage the outstanding **Event Options** click on the blue-arrow against the record. The **Booking- Event Option Detail** screen is displayed.

Fig 5.8 Booking- event option detail screen

To Book the Event Option click on **Book**

You are returned to the Event Option detail screen. This is for administrative purposes only and does not connect with any other third party system.

10.5 Batch Adding Delegates

The Batch Booking feature allows you to book multiple delegates on to multiple Events depending on their delegate type.

To access Batch Booking within the **Data Entry** menu on the left-hand side click on **Batch Bookings.**

The **Batch Booking** screen is displayed.

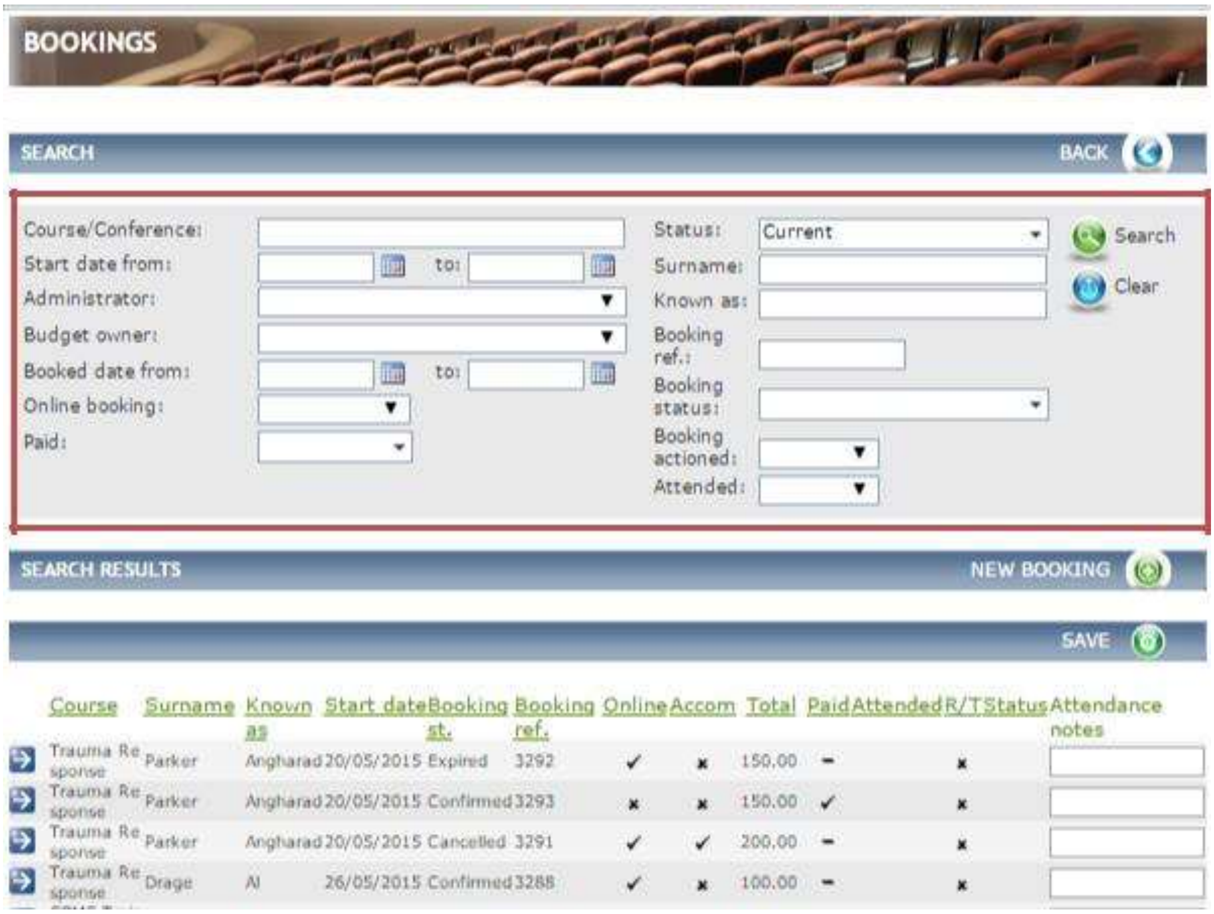


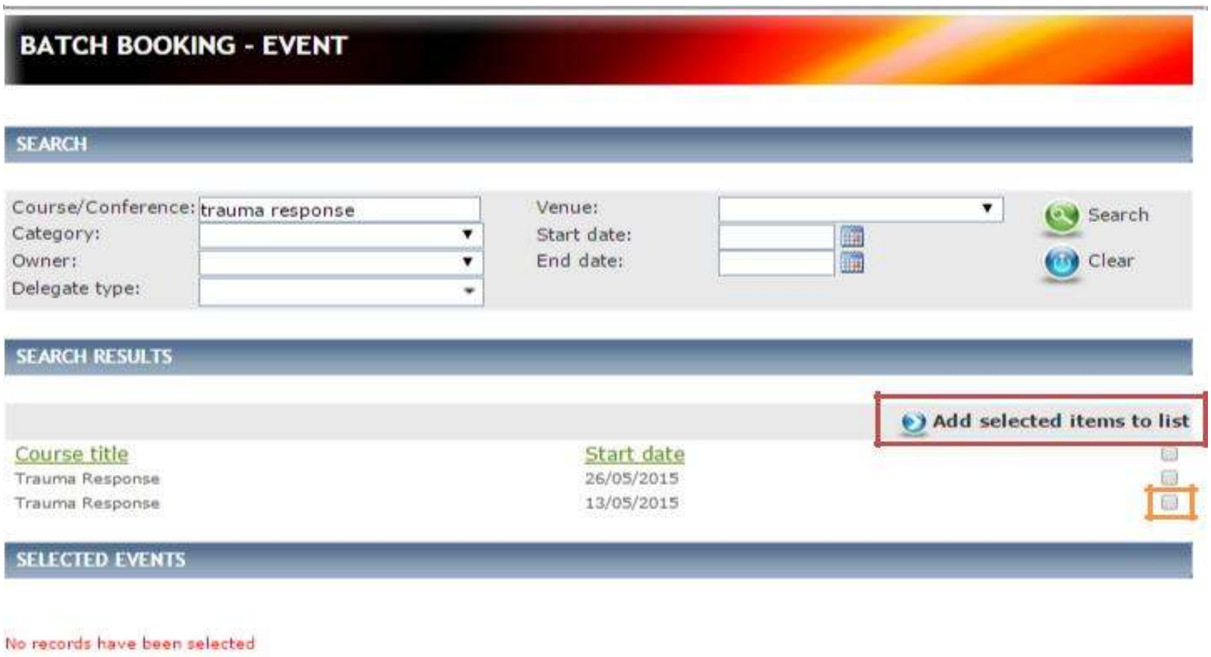
Fig 5.9 Batch - booking event screen

From here you can:

- Use the **Search** filters to find an Event you wish to Batch Book against in the area outlined in red in Fig 5.9 above.
- Under **Search Result** header you can see all Events that recent Bookings have been made against.

Once you have found the Event to batch add to, in the area outlined in orange in Fig 5.10 below, click on the tick-box and then click **add selected items to list** in the area outlined in red in Fig 5.10 below.

Fig 5.10 Batch booking - event screen



Once you have selected Add Selected items to list the Event details will populate under the header **Selected Events** see Fig 5.11 below.

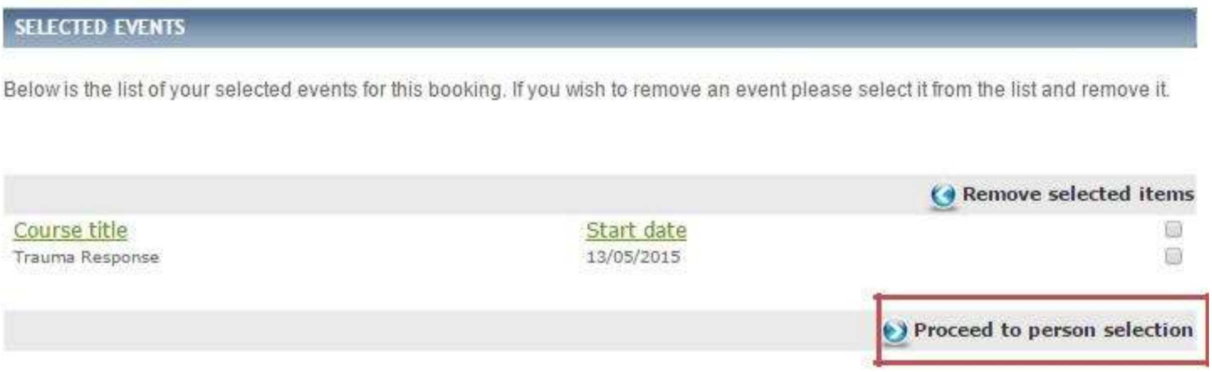


Fig 5.11 Selected event field

Select the Event(s) to re-confirm and then click on **Proceed to person selection** in the area outlined in red in Fig 5.11 above.

The **Batch Booking – Delegate** screen is displayed.

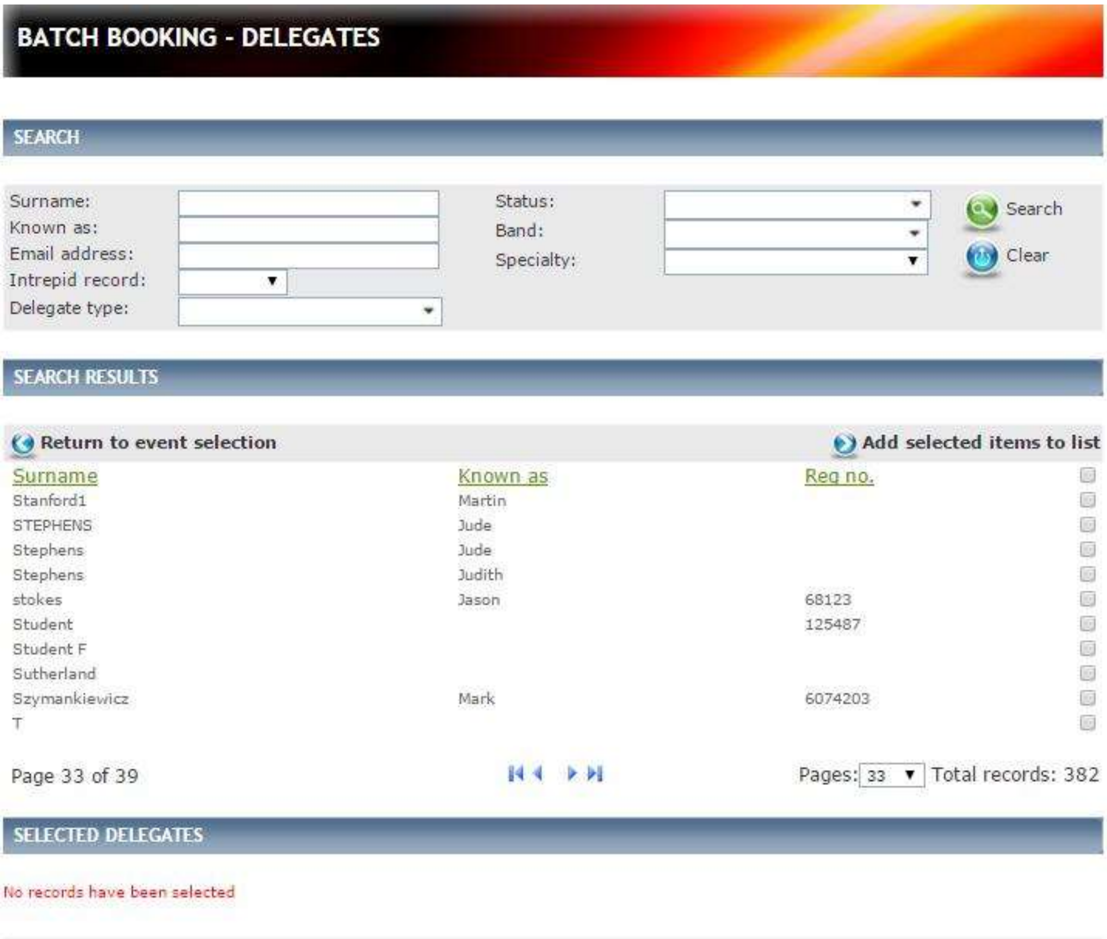


Fig 5.12 Batch booking – delegate screen

From this screen you can use the **Search** filters to narrow results to find the relevant delegates. A list of all delegates will be displayed under the **Search Results** header.

To select delegates to add to the Event click on the tick-box to the right then click on **Add selected items to the list.**

Note: If the '**Return to event selection'** button is clicked and you had already selected delegates these would drop off and you would need to re-select.

Once you have clicked on **Add selected items to list** you will see that the details populate under the Selected Delegates header see Fig 5.13 below.

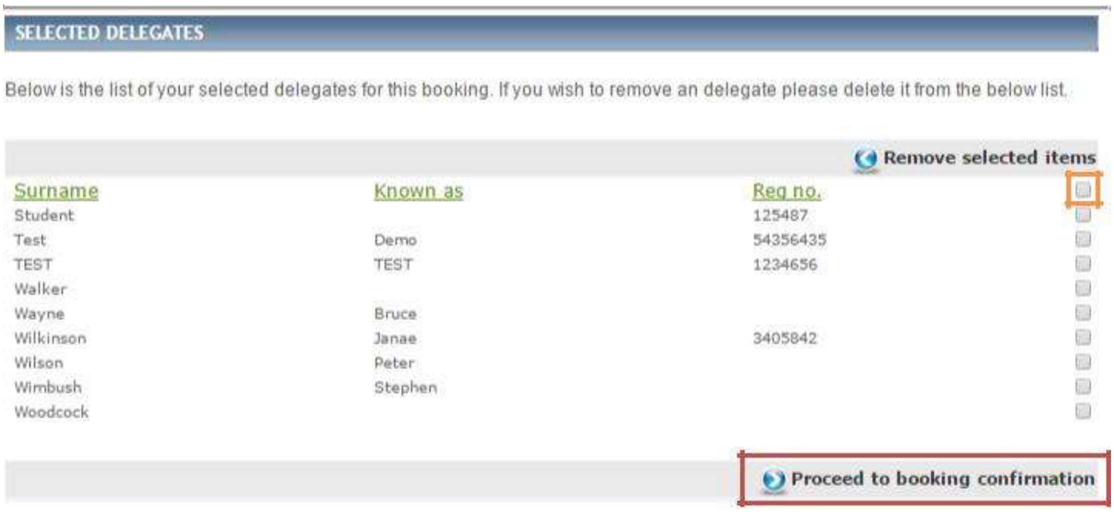


Fig 5.13 Selected delegates field

Click on the tick-box to the right of the delegates to re-confirm and then click on **Proceed to person selection** in the area outlined in red in Fig 5.13 above.

Note, to select all delegates in the list click on the top tick-box in the area outlined in orange in Fig 5.13 above.

Once you have clicked on **Proceed to booking confirmation.**

The **Batch Booking – Confirmation** screen is displayed.

Fig 5.14 Batch booking – confirmation screen

Click on **Book** to proceed to book all delegates onto the Event.

To go back to the person selection screen click on **Return to person selection.**

10.6 Recording Delegate Attendance

After the event takes place you must record the delegate attendance in order to release their evaluation. There are multiple ways to record attendance:

1. Attendance register
2. Individually
3. In Batch

10.7 Attendance Register

The attendance register feature enables a quick view of the attendance for a particular Course or Event. It enables you to edit a delegate's attendance. Allows for multiple or batch attendance to make it easier and quicker to see and change delegates attended status.

To access Attendance Register within **Data Entry** menu on the left-hand side click on **Attendance Register.**

The **Attendance Register** screen is displayed.

Fig 5.15 Attendance Register screen

Use the search filters to find Course/Event.

Note. You have to select a Course from the drop-down and then an Event from the drop-down in order for any results to be displayed.

The **Attendance Register (updated)** screen is displayed.

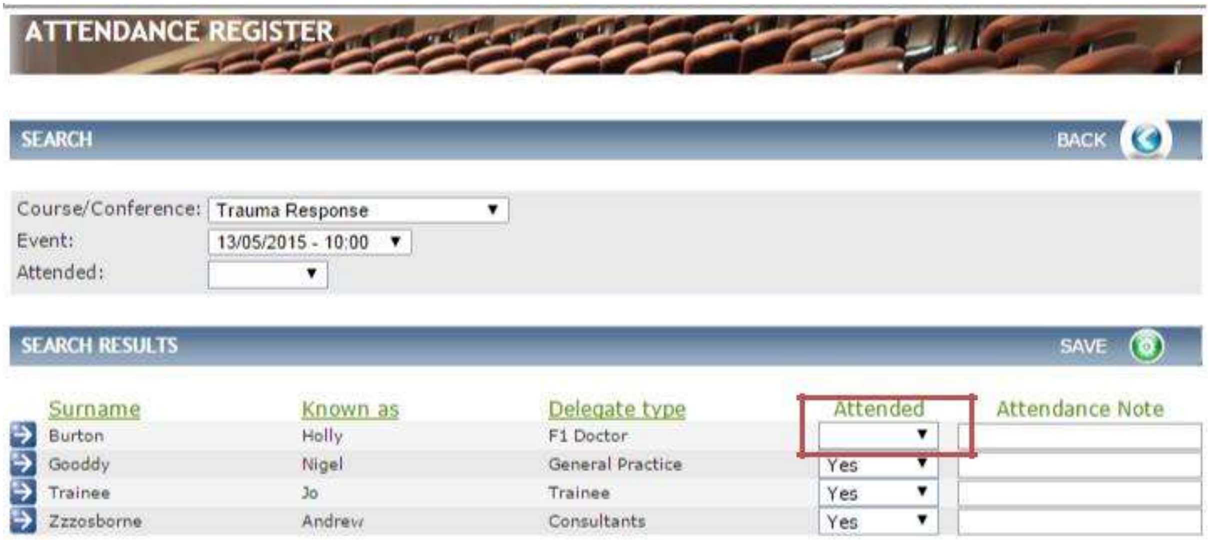


Fig 5.16 Attendance register (updated) screen

Under the **Search Results** header a list of all the delegates booked on the selected are displayed.

To update delegates Attendances click on the drop-down and select **Yes**, **No** or **Partial** in the area outlined in red in Fig 5.16 above. **Attendance notes** can be added in the free-text field if relevant.

Click on **Save.**

10.8 Individually

From the Event summary screen click on **Delegates** in the left-hand menu.

The **Event – Delegates** screen is displayed.

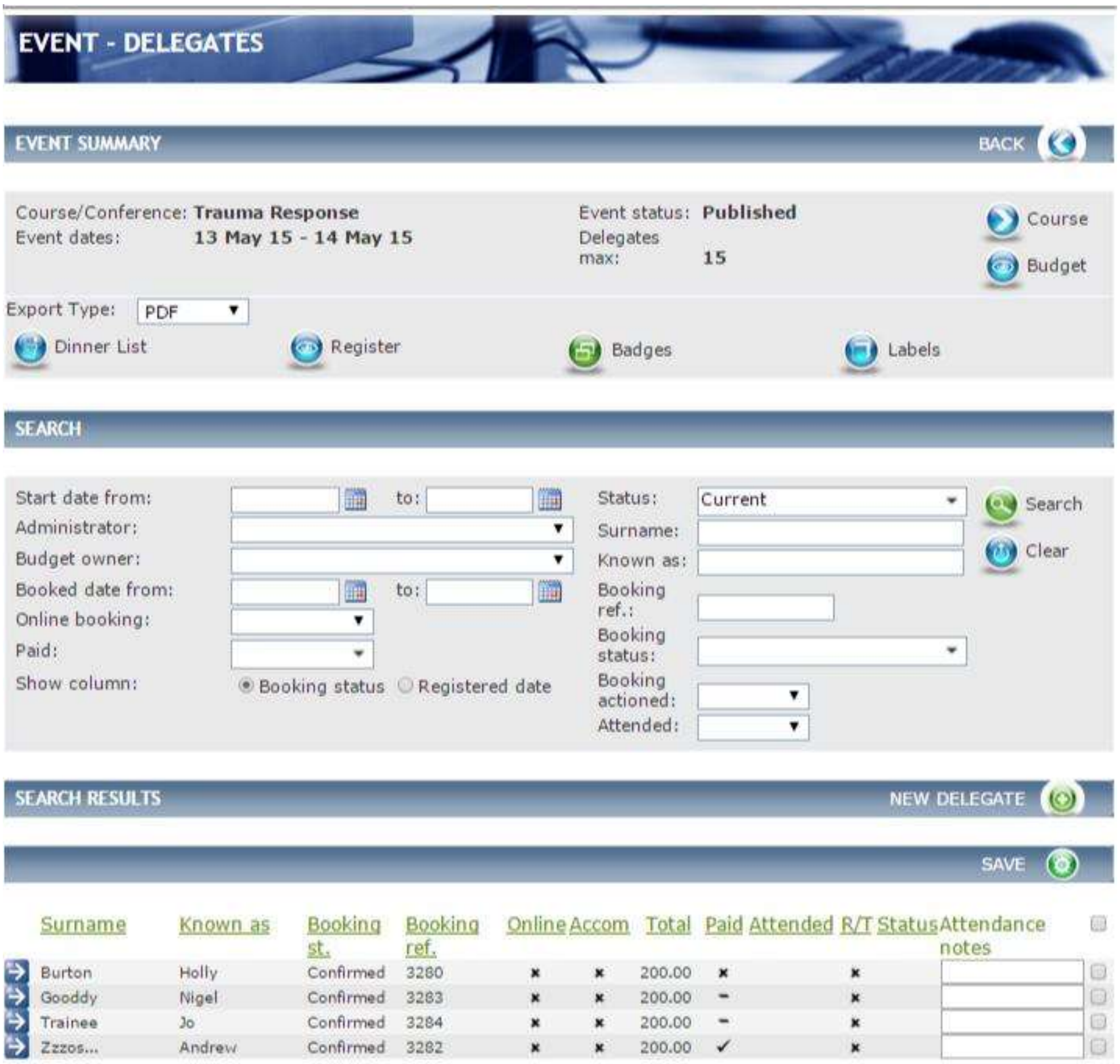


Fig 5.17 Event – delegates screen

Click on the blue-arrow to the left of the delegate that you want to show as attended in the area outlined in red in Fig 5.17 above.

The **Booking Detail** screen is displayed.

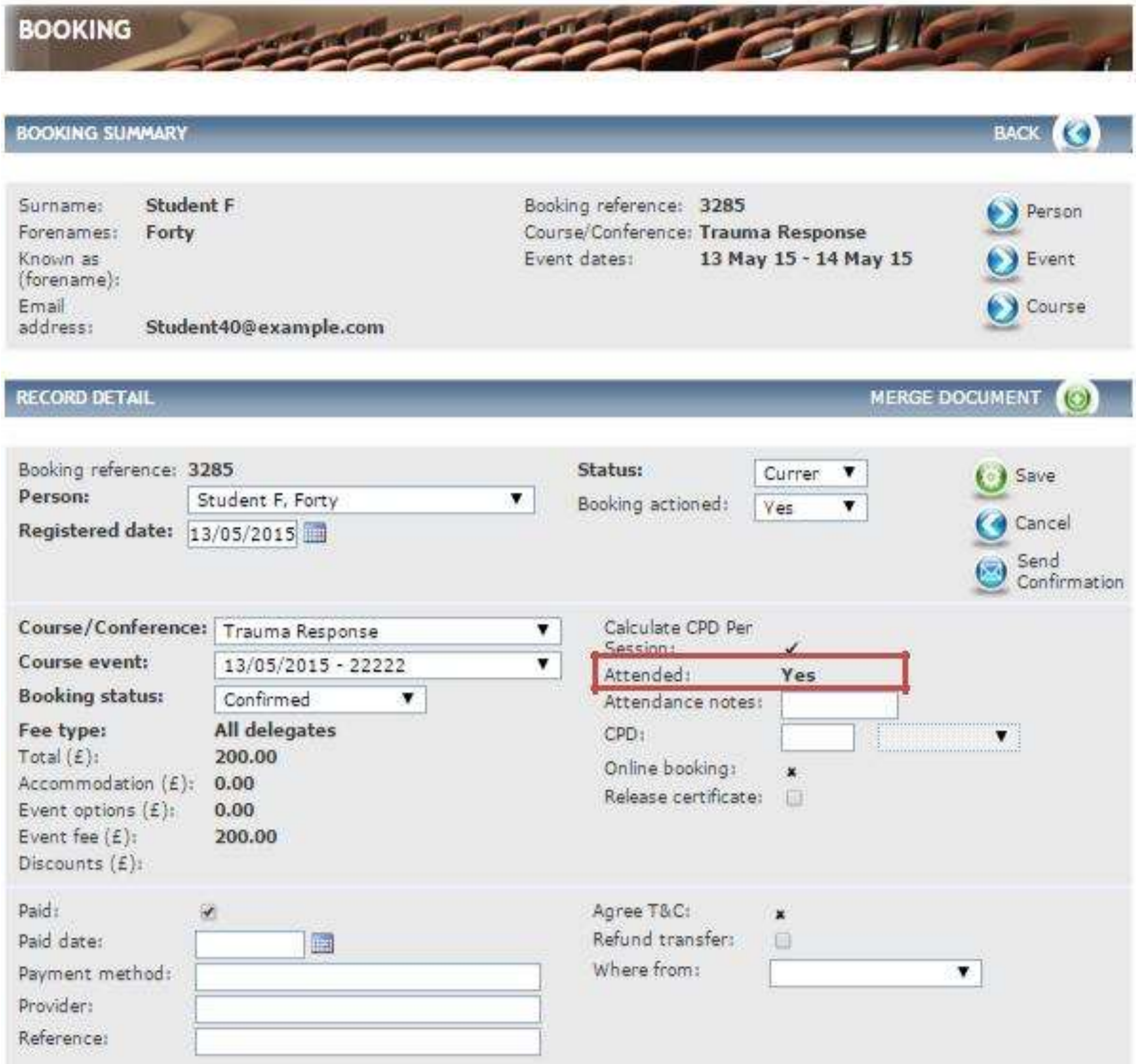


Fig 5.18 Booking detail screen

Within the record detail screen click on the drop-down next to **Attended** and select from Yes, No or Partial in the area outlined in red in Fig 5.18 above.

Attendance notes can be added in the free-text field.

Click **Save** to store these details.

Note: Please note partial CPD can be used in the instance where a delegate has had to leave an event early in the event of an emergency/illness. In these circumstances partial CPD can be awarded for the hours the delegate attended. Awarding partial CPD is at the Administrators discretion and should not be awarded if the delegate has simply left the event early.

When selecting the ‘Partial’ option, you will then need to add in the amount of hours to be awarded to the delegate.

10.9 In Batch

From the Event summary screen click on **Batch Attendance** in the left-hand menu.

The **Event – Batch Attendance** screen is displayed.

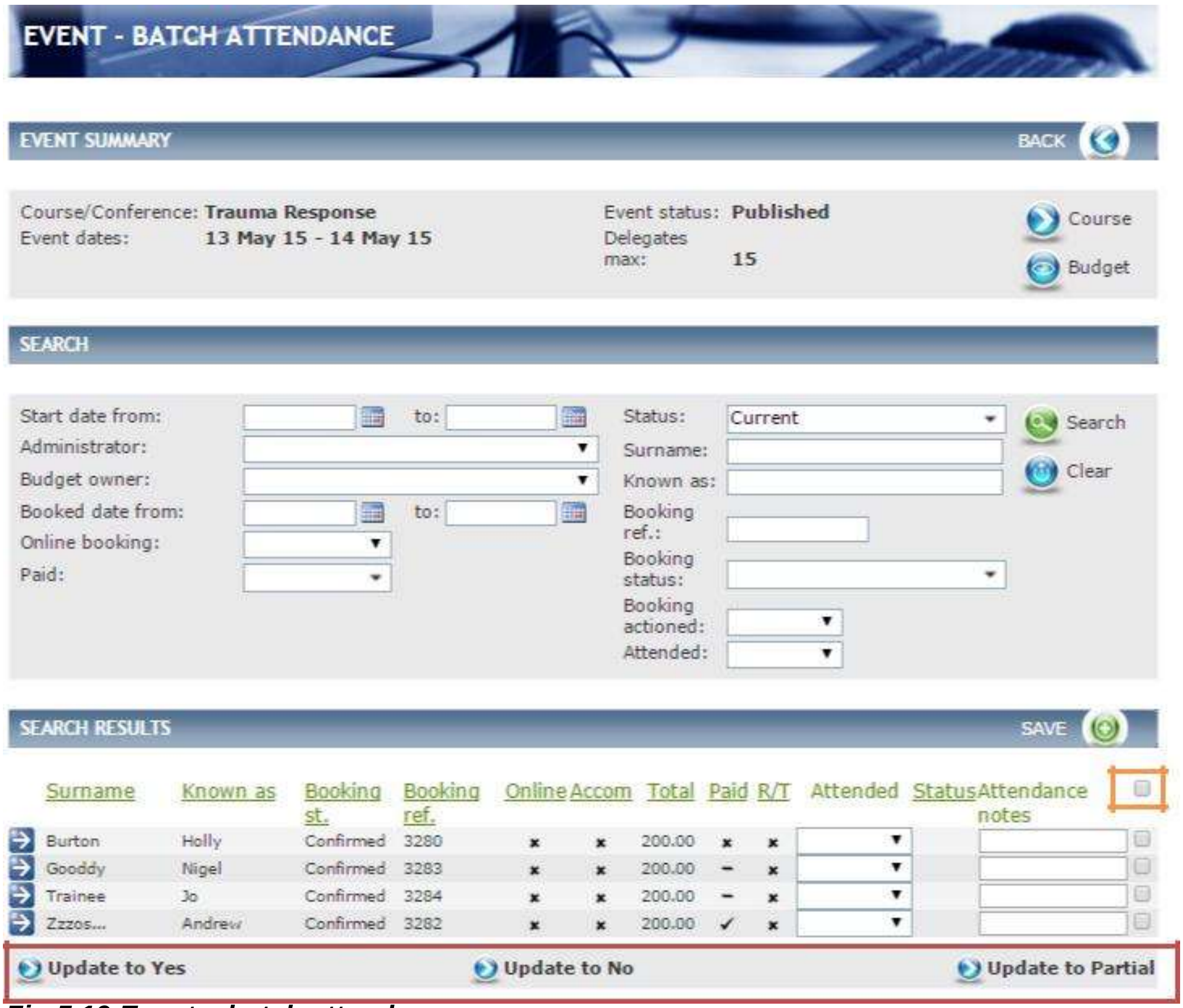


Fig 5.19 Event – batch attendance screen

From this screen you can:

- Use the **Search** filters to narrow results down.
- See a list of all delegates under the Search Results header that have Booked onto the Event.

To select delegates to mark as attended click in the tick-box to the left of the record or to select all click in the top tick-box in the area outlined in orange in Fig 5.19 above.

Select which Attendance update is relevant in the area outlined in red in Fig 5.19 above.

- If you select **Update to Yes** it will mark all selected delegates as attended.
- If you select **Update to No** it will mark all selected delegates as not attended.
- If you select **Update to Partial** it will mark all selected delegates as partially attended.

Click **Save.**

11 Managing People

You can add people (delegates, guests and speakers) to CBMS. You can also make any relevant amendments to their record. Remember, people refers mainly to delegates – users that you wish to be able to book themselves onto courses/events.

11.1 Adding a Person to Course Manager

Please note that HEEoE does encourage that all delegates register themselves onto the CBMS.

Within the **Data Entry** menu on the left hand side click **People.**

The **People** screen is displayed.

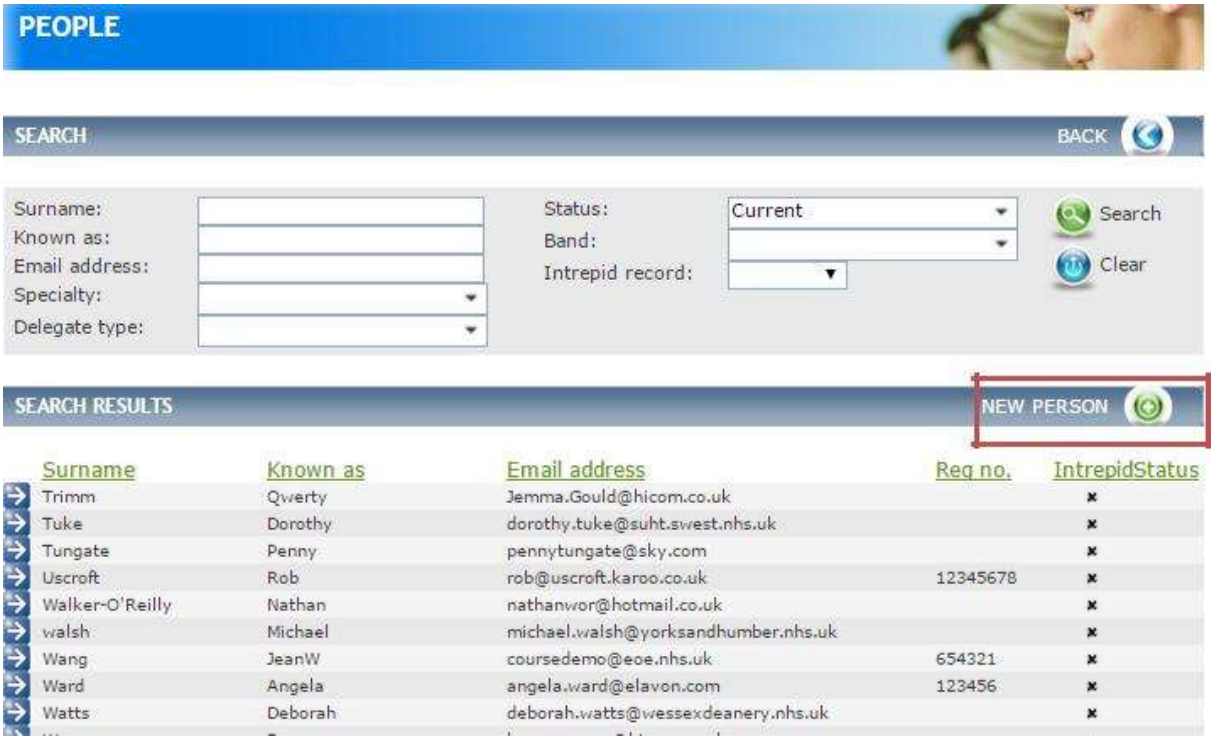


Fig 6.1 People screen

From this screen you can:

- Use the **Search** filter to find specific individual.
- Under the **Search Results** header see every delegate that is registered on the system

To add a new Person, click on **New Person.**

The **Person Details** screen is displayed.

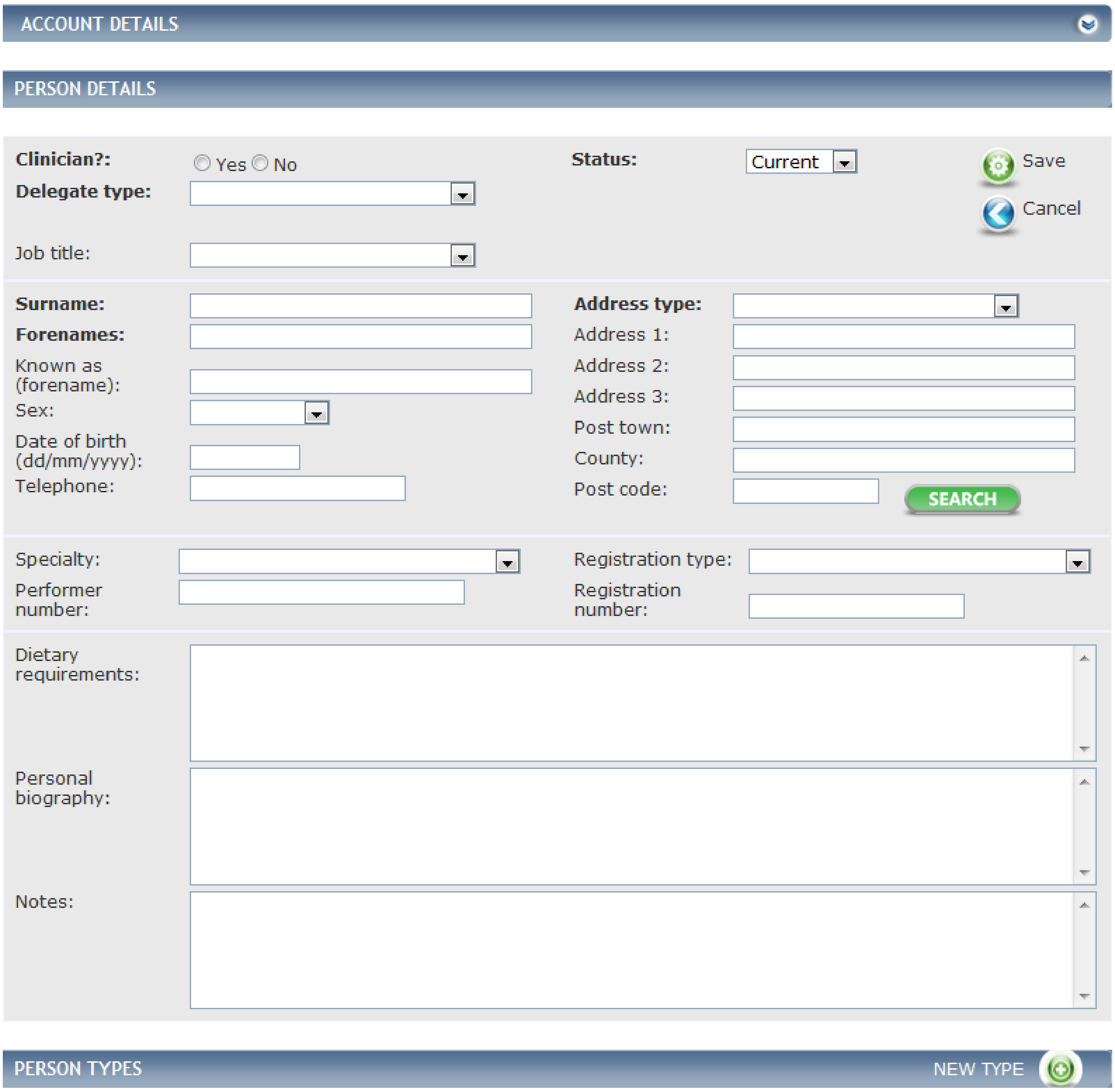


Fig 6.2 Person details screen

To add the Person's Details complete the fields as follows:

- Select **yes** to if they are a **Clinician and Dental Delegate type.**
- Enter **Job title**, **Surname**, Forenames, **Known as (forename)** if relevant, **Sex**, **Date of birth**, **Telephone** and **Registration number.**
- Select **Specialty** and **Performer number** if required.
- Select **Address type.** (Populated from reference table Person – Address type).
- Enter the **Address** or enter the **Postcode** and click on search. This will verify the address based on the postcode.
- Enter **Email Address.**
- Enter any **Dietary requirements, Personal biography** and **Notes** for the delegate if relevant– enter any dietary needs the delegate may have.

Click on **Save** to store your new person.

11.2 Managing a Person's Account Credentials

Within a Person Record, the **Account** details are held within a collapsible panel click on the **chevrons** in the header. Click on this header.

The Person's **Account details** are displayed.

Fig 6.3 Person account details

From this screen you can:

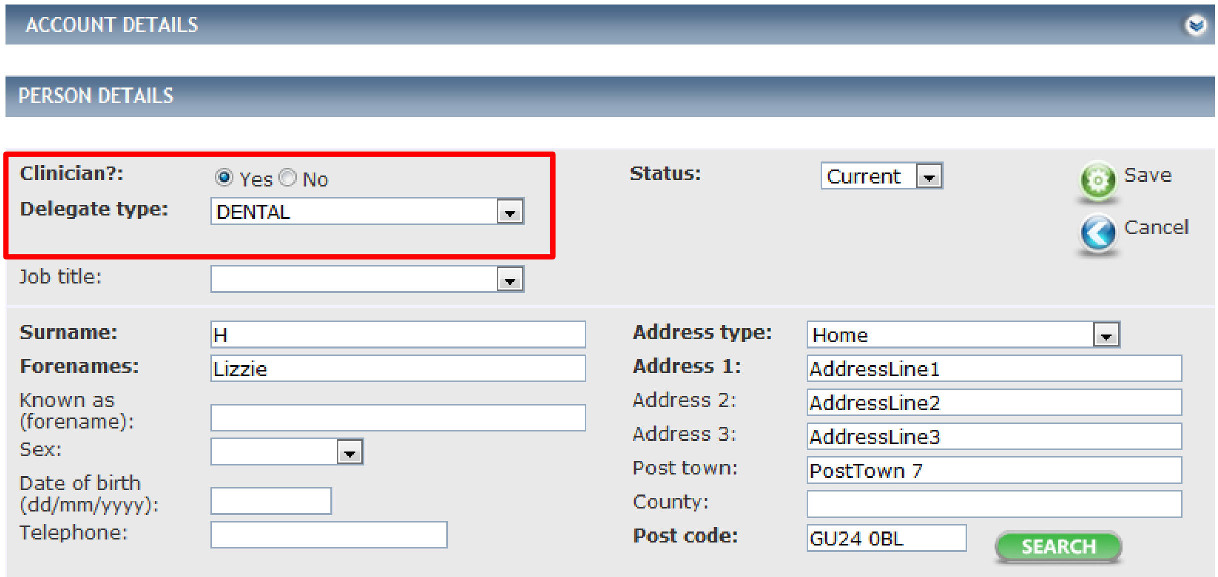
- Enter a person's **Email address**.
- Enter any relevant **Comments.**

Once details have been entered Click **Save.**

You can also click **Reset Password** if a person has forgotten their password. This sends them an email to reset their password.

11.3 Amending a Person's Delegate type

If a delegate sets up their account incorrectly when registering e.g. selecting 'No' to 'Are you a clinician', the administrator can amend this in the persons record:



11.4 Adding Person Types to the Person's Record

You can select which **Person Type** a person is i.e. a delegate or when a speaker or lecturer is placed on the system they can be marked as such using Person type.

Click on **New Type** in the area outlined in red in Fig 6.2

The **Person-Person Type** screen is displayed.

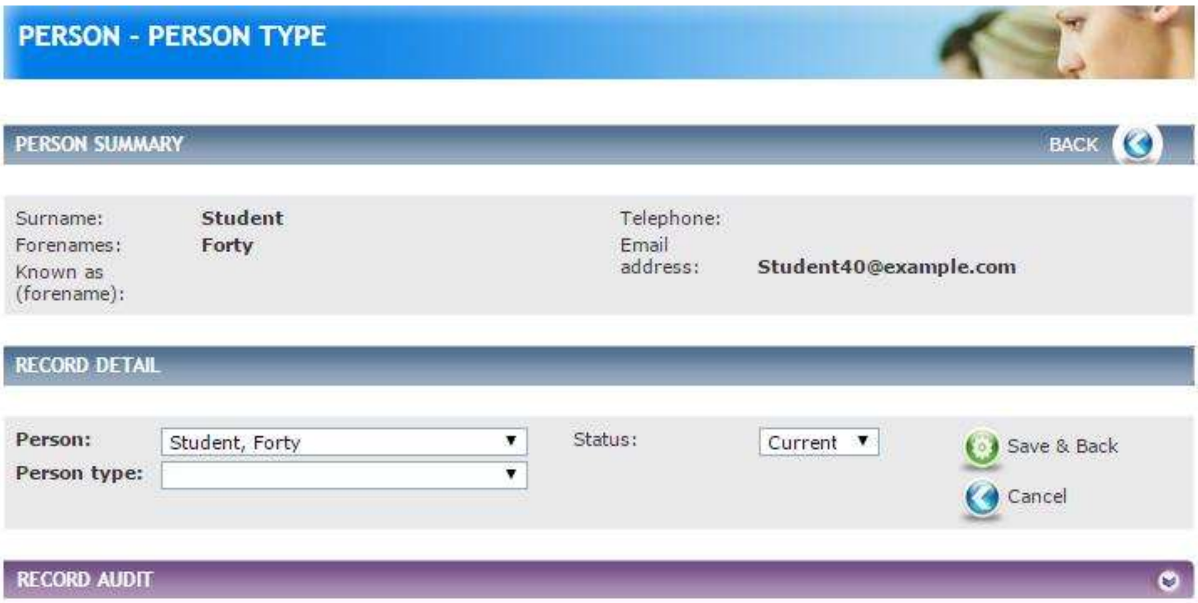


Fig 6.4 Person-person type screen

Select the Person type from the **Person Type** drop down (populated from reference table Person – Person type).

Click **Save & Back.**

The new **Person Type** is now displayed within the Person Details screen, in the Person Type section.

11.5 Adding Additional Details

Once you have created a Person you can add the following details:

1. Courses & Conferences
2. Document
3. Notes
4. Email logs
5. Representatives

11.6 Courses & Conferences

From the Person summary screen you can add Course/Conference. Click on **Courses/Conferences** from the left-hand menu.

The **Person-Course/Conference** screen is displayed.

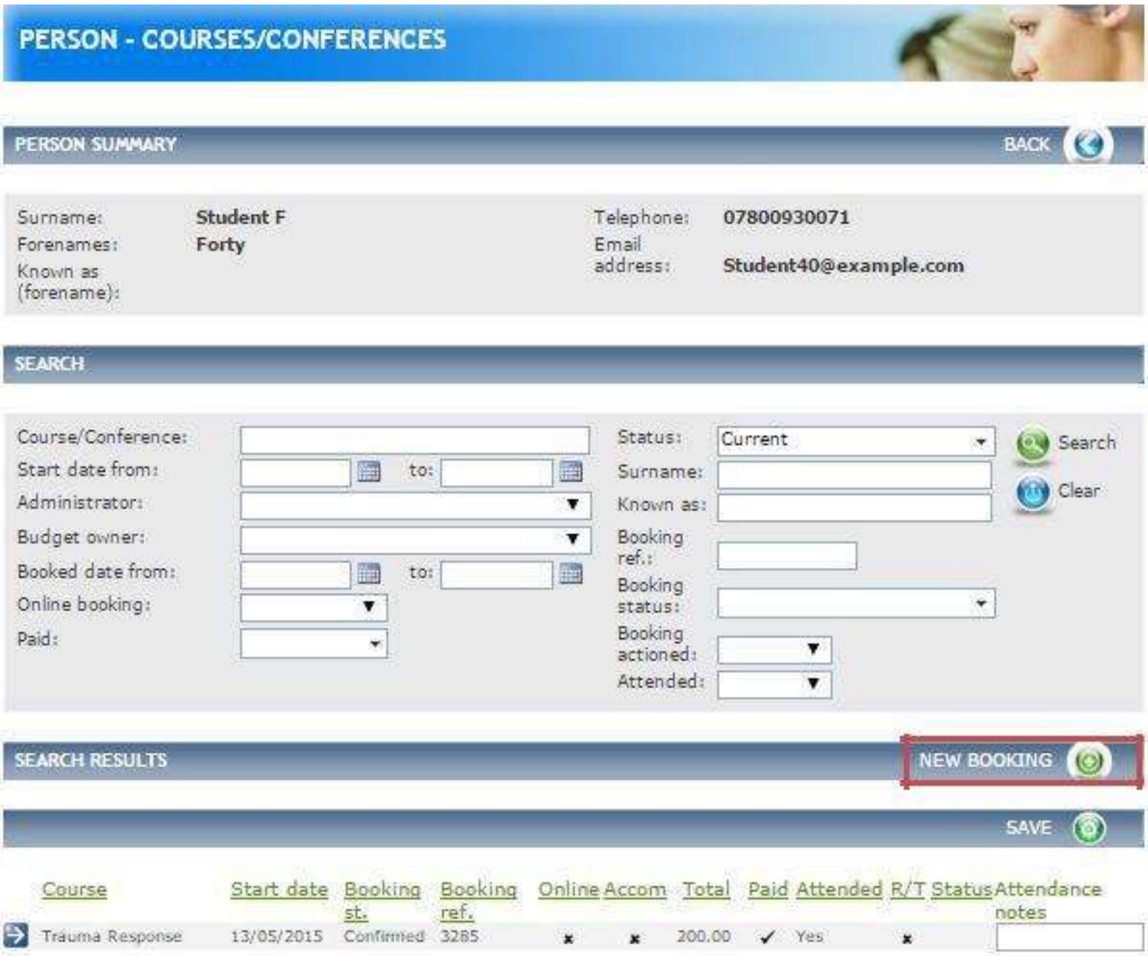


Fig 6.5 Person-course/conference screen

From this screen you can:

Use the **Search** filters to find a Course/Conference.

- See all bookings for this delegate/person under the **Search Results** header. Create a new booking in the area outlined in red in Fig 6.5 above.

For information on how to create a new booking click on **New Booking** see section 5.1.

11.7 Documents

From the Person summary screen you can add Documents. Click on **Documents** from the left-hand menu.

The **Person – Document** screen is displayed.

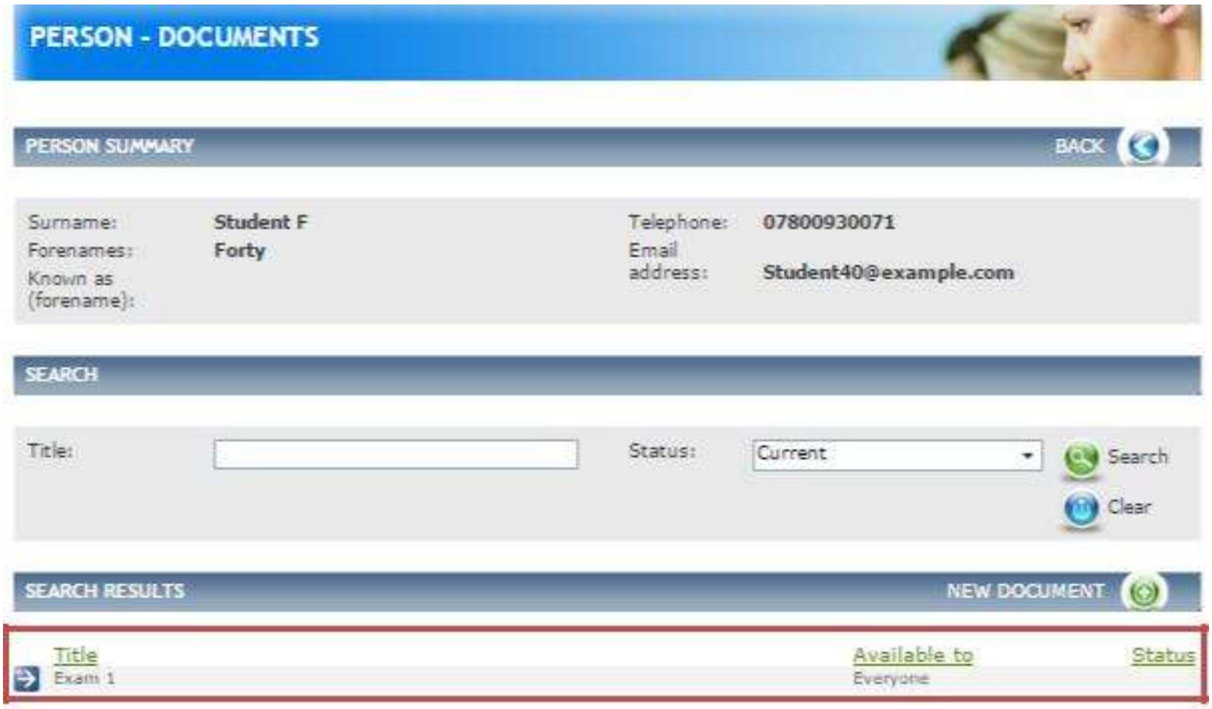


Fig 6.7 Person – document screen

If any Documents have already been added they will appear in the bottom half of the screen, in the area outlined in red in Fig 6.7 above.

Click on **New Document.**

The **Person – Document Detail** screen is displayed.

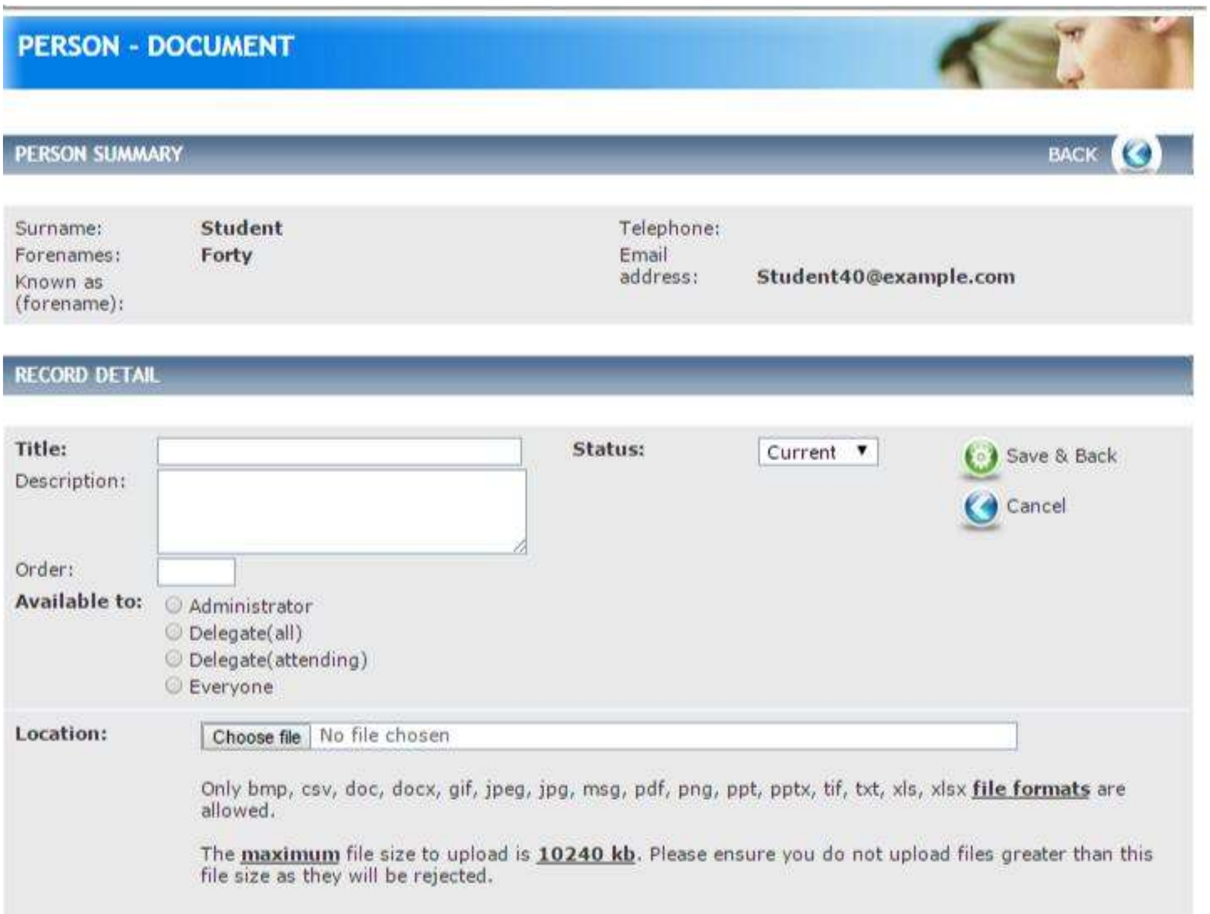


Fig 6.8 Person – Document detail screen

Complete the details as follows:

- Enter a **Title, Description** and an **Order** of the Document if relevant. The order will sort the list of Documents displayed to the delegate in the document tab.
- **Note**, the **Available to** fields are displayed the same as in the Event and Course but are not relevant to the Person as the Document is for administration purposes only

Upload the Document by clicking on **Choose file** in the **Location** field.

You are returned to the Documents list screen, where you will see that your Document has been added

11.8 Notes

This section allows Notes to be made against a Person record. These are only visible to administrators; delegates will not be able to see them.

From the Person summary screen you can add notes. Click on **Notes** from the left-hand menu.

The **Person Notes** screen is displayed.

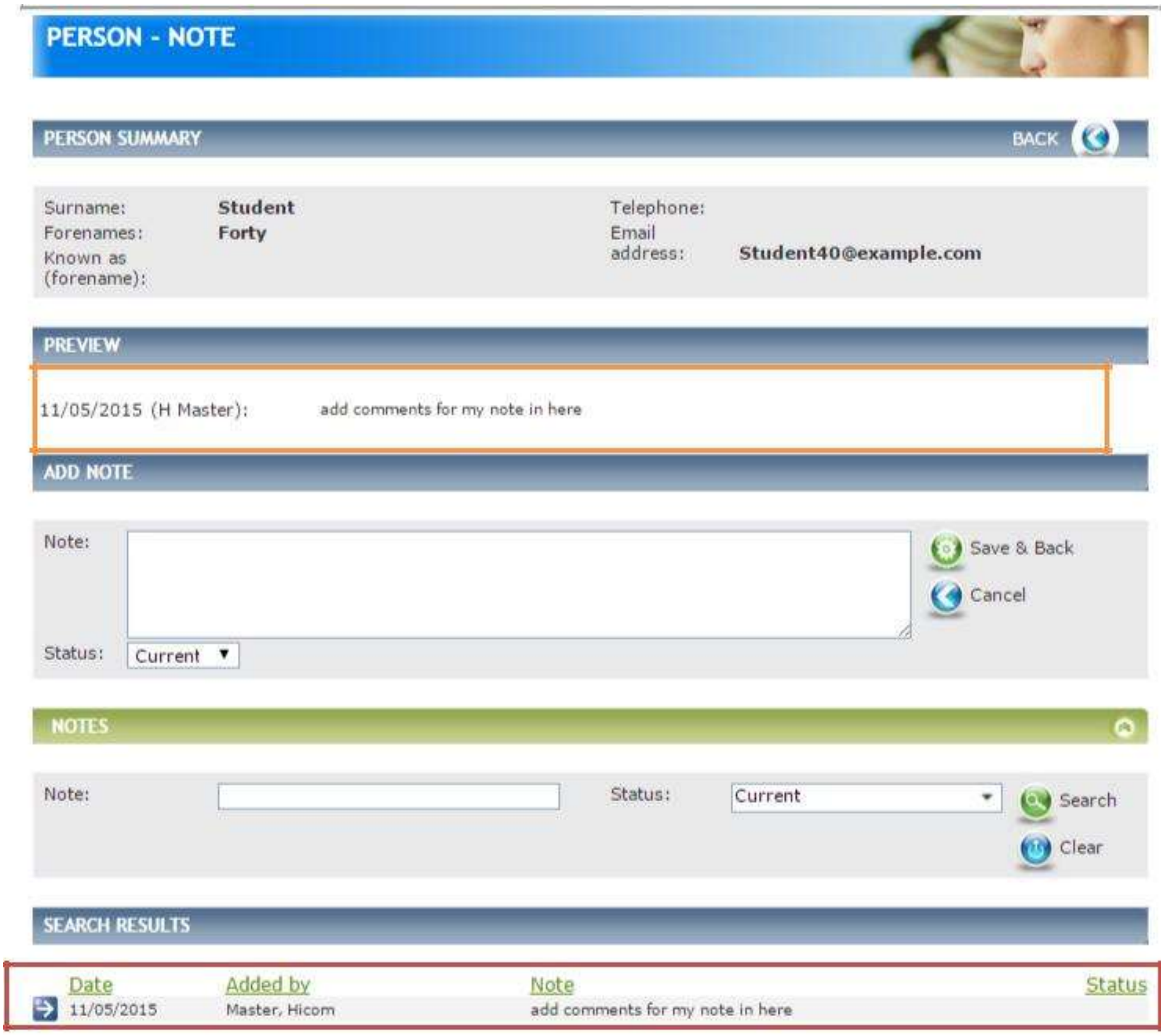


Fig 6.11 Person notes screen

If any Notes have already been added they will appear in the bottom half of the screen if you expand the chevrons in the Search Results header bar, in the area outlined in red in Fig 6.11 above. They will also appear within the Preview section in the area outlined in orange in Fig 6.11 above.

To add a new Note enter the details of the **Note** and click **Save & Back.**

You are returned to the Note list screen, where you will see that your Note has been added.

11.9 Email Logs

Emails are sent to the delegate automatically via the system when bookings need to be paid for or evaluations must be completed.

From the person summary screen you can view emails. Click on **Email Log** from the left-hand menu.

The **Person – Email Log** screen is displayed.

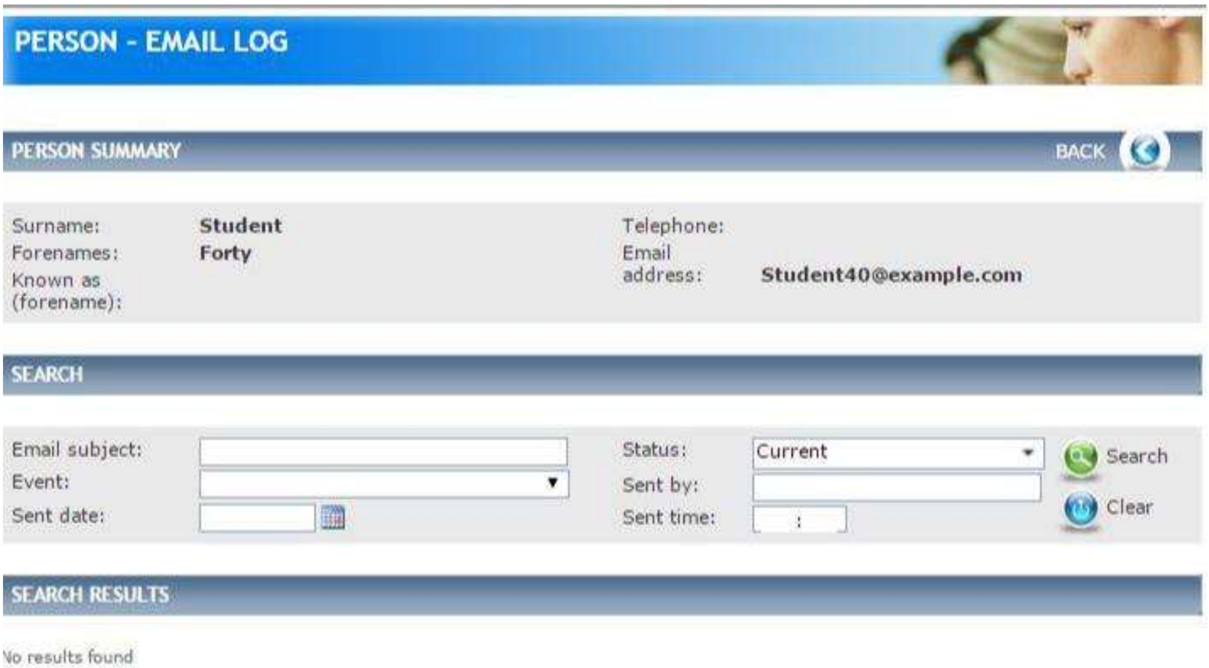


Fig 6.12 Person – email Log screen

If any Emails have already been sent they will appear in the bottom half of the screen, in the area outlined in red in Fig 6.12 above.

From this screen you can:

- Use the **Search** filters to find a specific email.
- Under the **Search results** header you can see a record of every email sent to the delegate. View emails.

11.10 Representatives (Multi-booking)

A representative is a person who can book another person onto a course on their behalf.

From the Person summary screen you can edit person Representative details. Click on **Representative** from the left-hand menu.

The **Person Representative** screen is displayed.

Fig 6.13 Person representative screen

If any Representatives have already been added they will appear in the bottom half of the screen, in the area outlined in red in Fig 6.13 above.

To add a new representative click on **Add/Remove Representatives.**

The **Representative** screen is displayed.

Fig 6.14 Representative screen

You can use the **Search** filters to narrow results. Click in the tick-box to the right of the person you wish to add in the area outlined in red in Fig 6.14 above.

Click **Save & Back.**

11.11 Editing an Existing Person

The Account details are held within a collapsible panel at the top of the page.

Fig 6.15 Person account details

From this screen you can:

- Change person‟s **Email address.**
- Select **Account status** to disable or enable.
- Select **Reset Password** and an email with a new password will be sent to the delegate.

Note: A delegate is able to reset their own password from within the CBMS login screen.

The Personal Details occupies the rest of the page. Details can be changed here as needed. Within **Data Entry** menu on the left-hand side click on **People.**

Use the **Search** filter to find the persons record to update/amend.

Click on the blue-arrow to open the person's record in the area outlined in red in Fig 6.16 above.

This will take you to the Person detail screen. The fields are the same as when creating person records.

12 Managing Finance

12.1 Finance Budgets

Budgets can be managed and amended from within this page.

To access Budgets within the **Finance** menu on the left-hand side click on **Budgets.**

The **Budgets** screen is displayed.

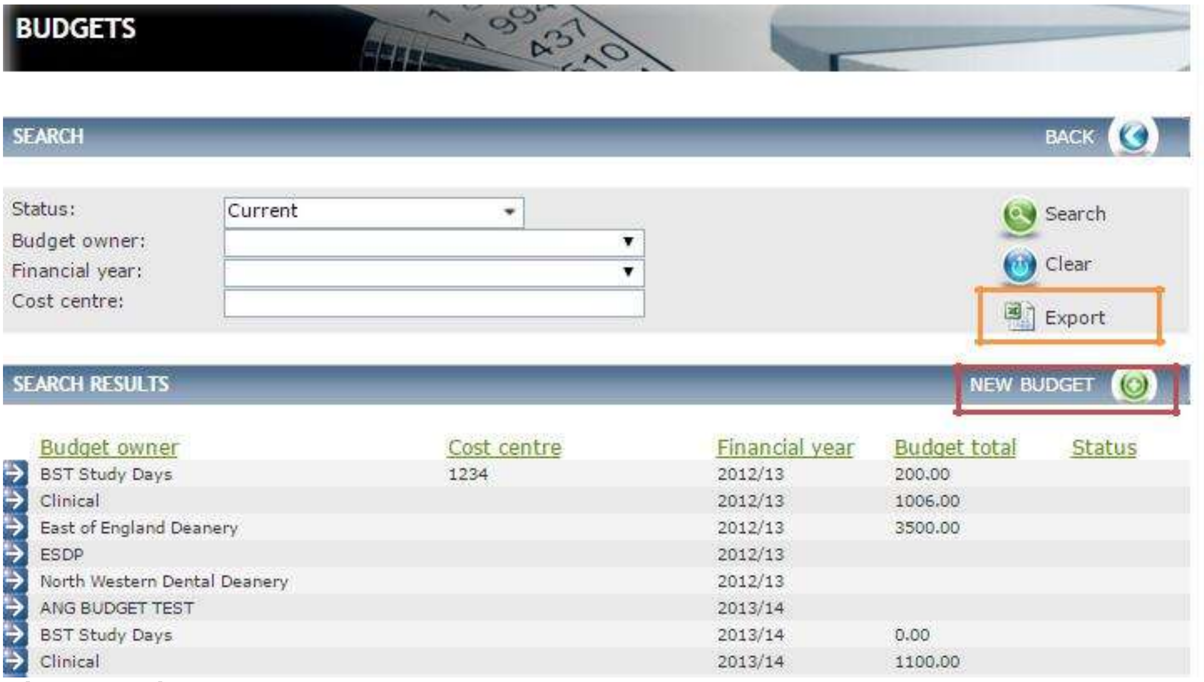


Fig 7.1 Budgets screen

From this screen you can:

- **Search** for a budget by using the filters.
- **Export** details for all budgets in the area outlined in orange in Fig 7.1 above. Under the **Search Results header** see a list of all Budgets.
- Enter an individual budget record by clicking on the blue-arrow to the left.
- Manage and or amend a particular **New Budget** in the area outlined in red in Fig 7.1 above.

To manage or amend a specific Budget click on **New Budget.**

The **Budget Detail** screen is displayed.

Fig 7.2 Budget detail screen

Complete the details as follows:

- Select a **Budget** from the drop down (populated from reference table Course – Owner) and the **Financial year** from the drop down (populated from reference table Finance – Financial Year)
- Any courses with the same course owner as the option selected in budget, and any events that fall in the same financial year will be searched for.

Enter the **Cost centre** (Populated from reference table Course – Cost centre).

Click on the icon next to **Generate** in the area outlined in red in Fig 7.2 above.

The **Budget Owner Detail** screen is displayed.

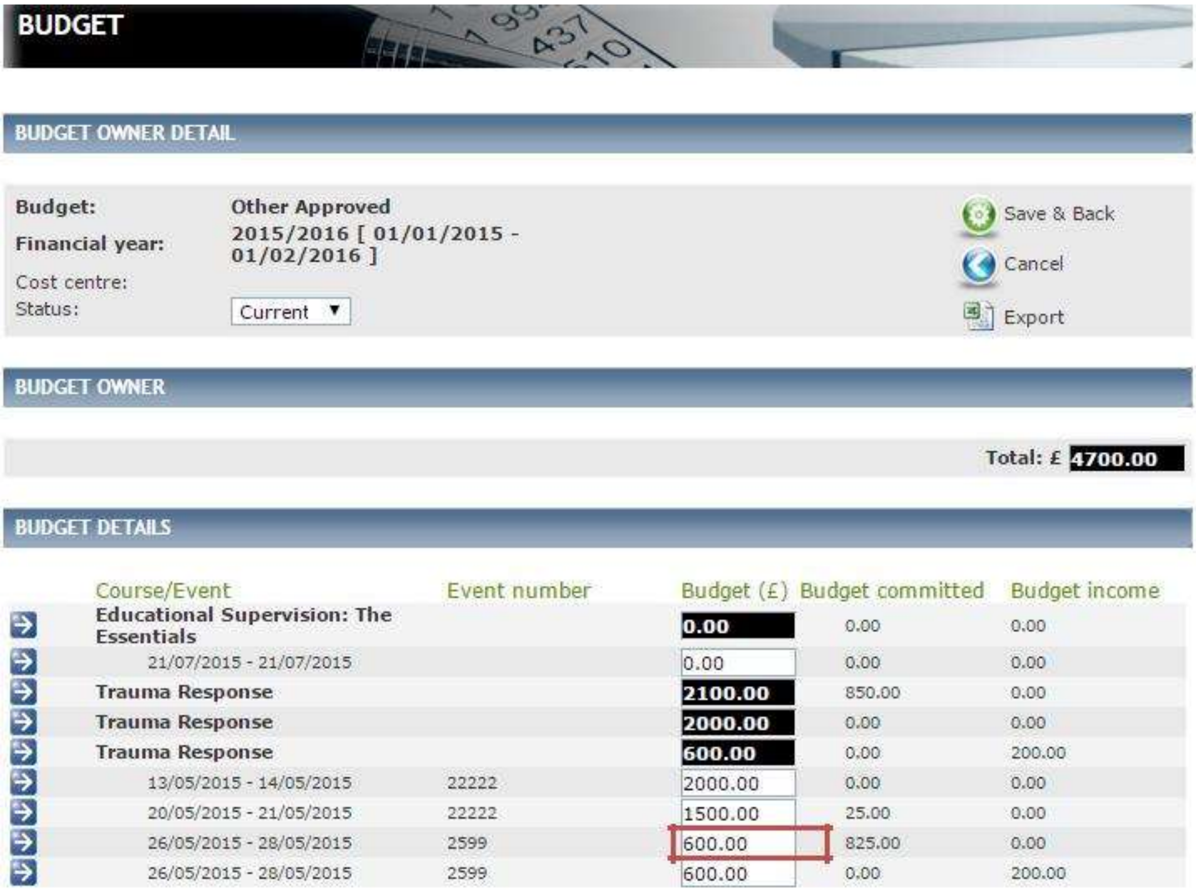


Fig 7.3 Budget owner detail screen

From this screen you can:

See the **Budget Owner**. This displays the total budget for the financial year you searched on. See a list of all the Budget Details for all Courses and Events that fall within this Budget. This view gives you the following details:

- **Course/event** the name of the course and the dates of each event within the course.
- **Event number** displays the Event number, if entered.
- **Budget** gives a breakdown of the Budget per Course and Event.
- **Budget committed** shows current balance of monies spent.
- **Budget income** shows balance of monies received.

To change the Budget Owner for a Course, click on the blue-arrow against the budget record. This will take you to the Course summary page where you can amend the budget owner.

To change the Budget allowance for an Event, click in the Budget amount box and overtype the current figure in the area outlined in red in Fig 7.3 above.

12.2 Finance – Income

This page contains a list of all Incomes within the system.

This allows you to manage and process Incomes and payments without having to go into each individual Course/Event or Booking record.

To access Income within the **Finance** menu on the left-hand side click on **Income.**

The **Income** screen is displayed.

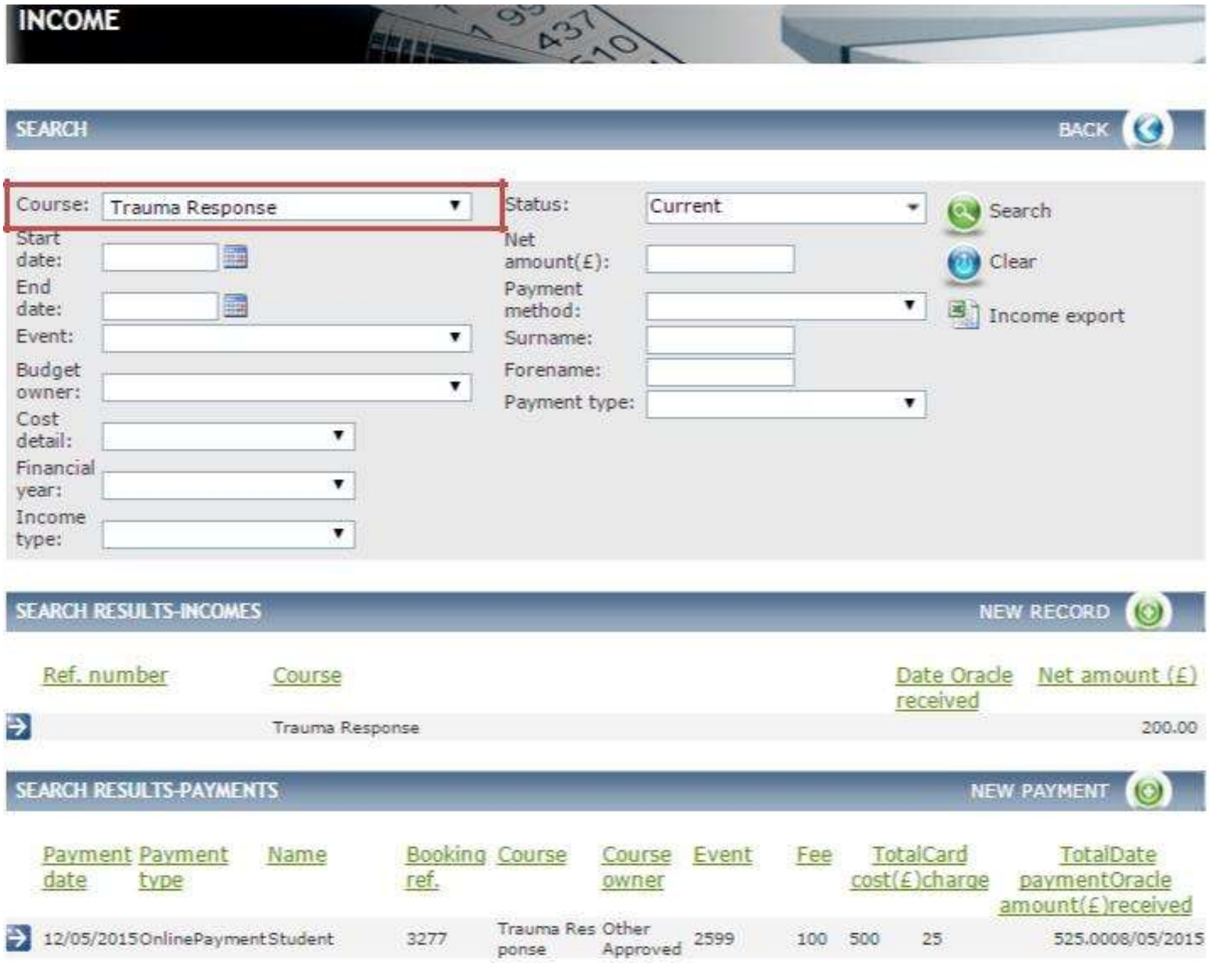


Fig 7.4 Income screen

From this screen you can:

- Use **Search** filters to narrow result down.
- Under the **Search Results -Income** see all incomes paid that are linked to the Course. Under the **Search Results Payments** see all payments made against the Course.

To add a new income click on **New Record.**

The **Event – Finance Detail** screen is displayed.

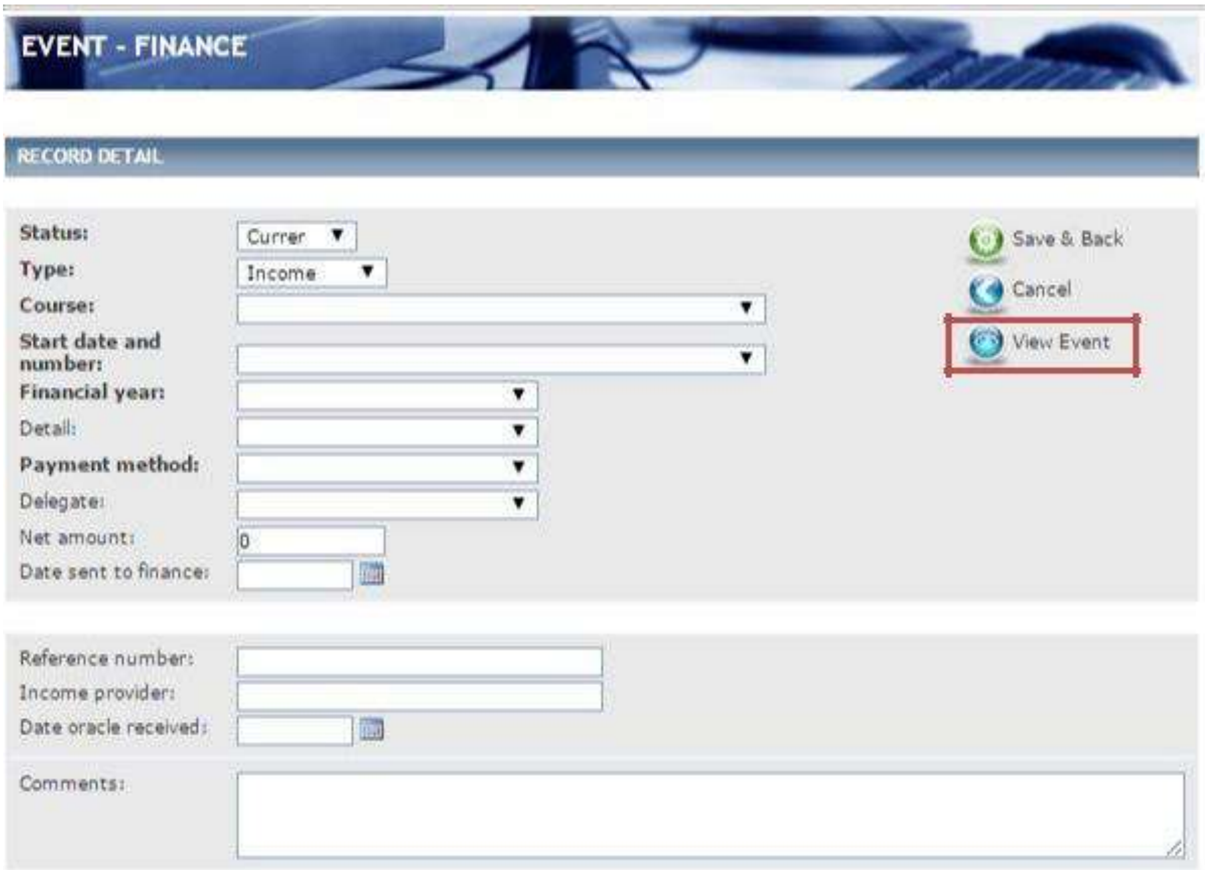


Fig 7.5 Event – finance detail screen

Complete the details as follows:

- Select a **Course**, **Start date and number**, **Financial year**, **Detail** (populated from reference table Finance Detail type), **Payment method** (populated from reference table Finance – Method payment) and **Delegate** (populated if delegates have booked onto an Event).
- Enter a **Net amount**, **Date sent to finance**, **Reference number**, **Income provider** and the **Date oracle received**.
- If relevant enter any **Comments.**

Click **Save & Back.**

Note, click on the icon next to **View Event** to navigate to that specific event if more details are required in the area outlined in red in Fig 7.5 above.

To add a new Payment click on **New Payment** from the Income screen.

The **Finance** – **Payment Detail** screen is displayed.

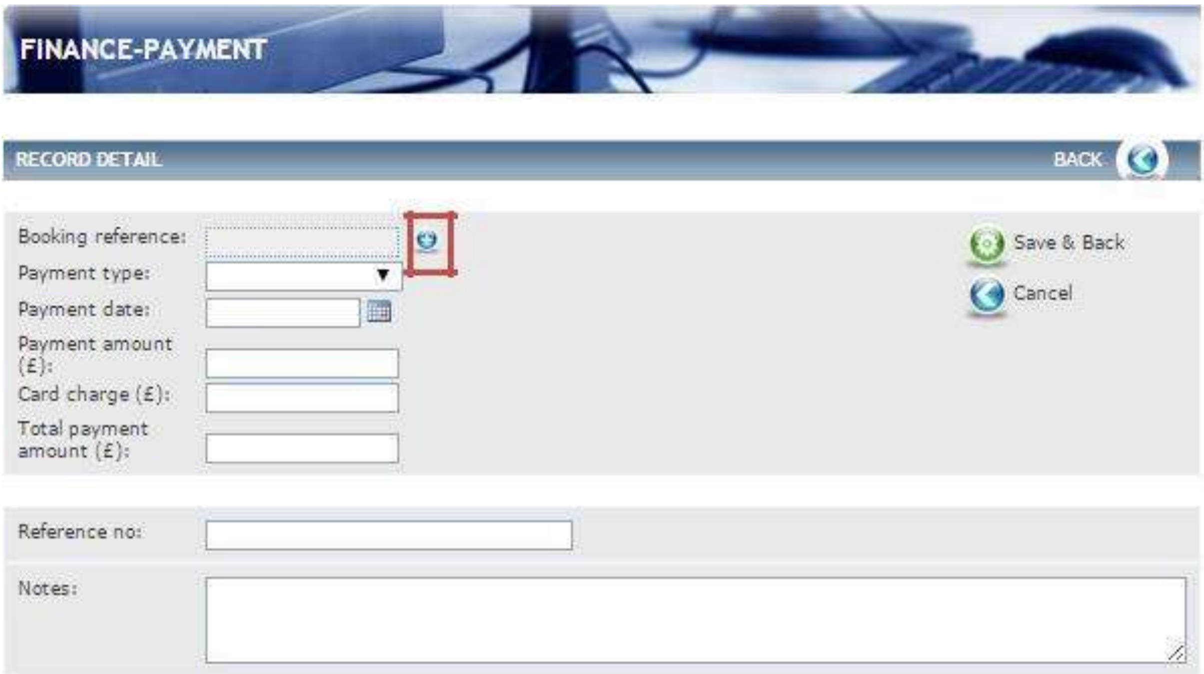


Fig 7.6 Finance – payment detail screen

Complete the details as follows:

- Select the blue plus icon against **Booking reference** in the area outlined in red in Fig 7.6 above A pop-up screen of the bookings screen is displayed see Fig 7.7
- Enter relevant details in the search criteria. Click on the blue-arrow to select the Booking to which this relates, on doing so you are taken back to the Finance – Payment detail screen.
- Select a **Payment type** (populated from reference table Finance – Payment method).
- Enter a **Payment Date**, **Payment amount**, **Card charge**, **Total payment amount** and
- **Reference no.**
- Enter any relevant **Notes.**

Click **Save** & **Back**.

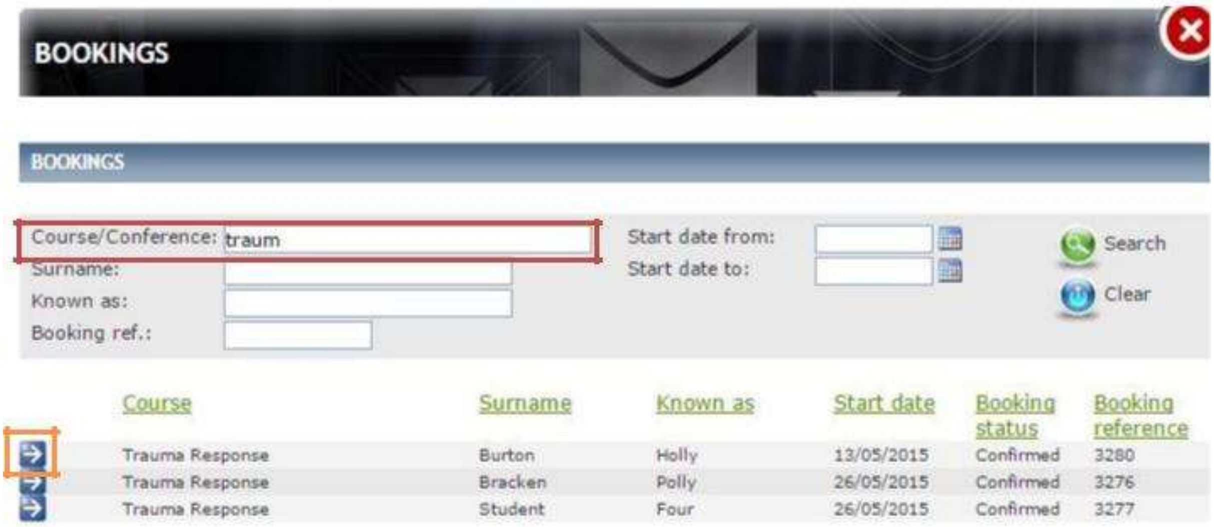


Fig 7.7 A pop-up screen of the bookings screen

12.3 Finance – Expenses

This page contains a list of all expenses within the system.

Allows you to manage and process expenses without having to go into each individual course/event record.

To access expenses within the **Finance** menu on the left-hand side click on **Expenses.**

The **Expenses** screen is displayed.

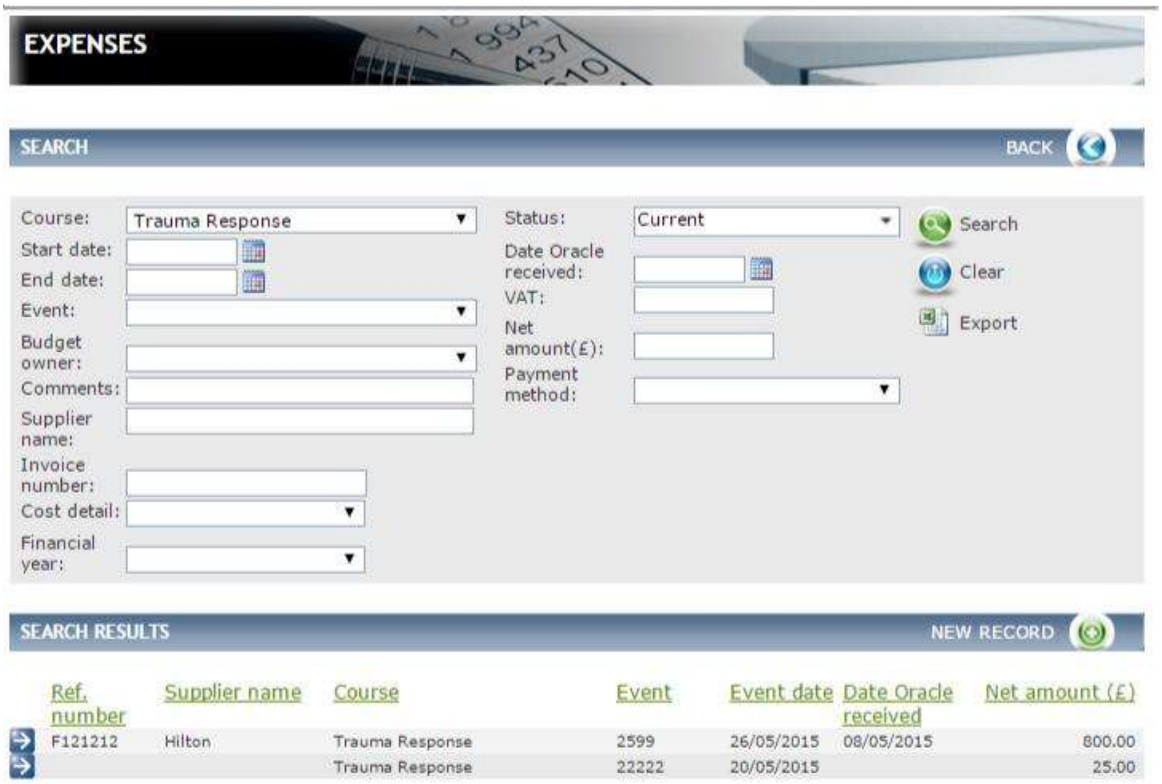


Fig 7.8 Expenses screen

From this screen you can:

- Use the **Search** filters to narrow results down.
- Under the **Search Results see** all expenses that are linked to the Course.

Note, if no search filters were applied a list of all expenses would appear under the search results header.

To add a new Expense click on **New Record**.

The **Event – Finance** screen is displayed.

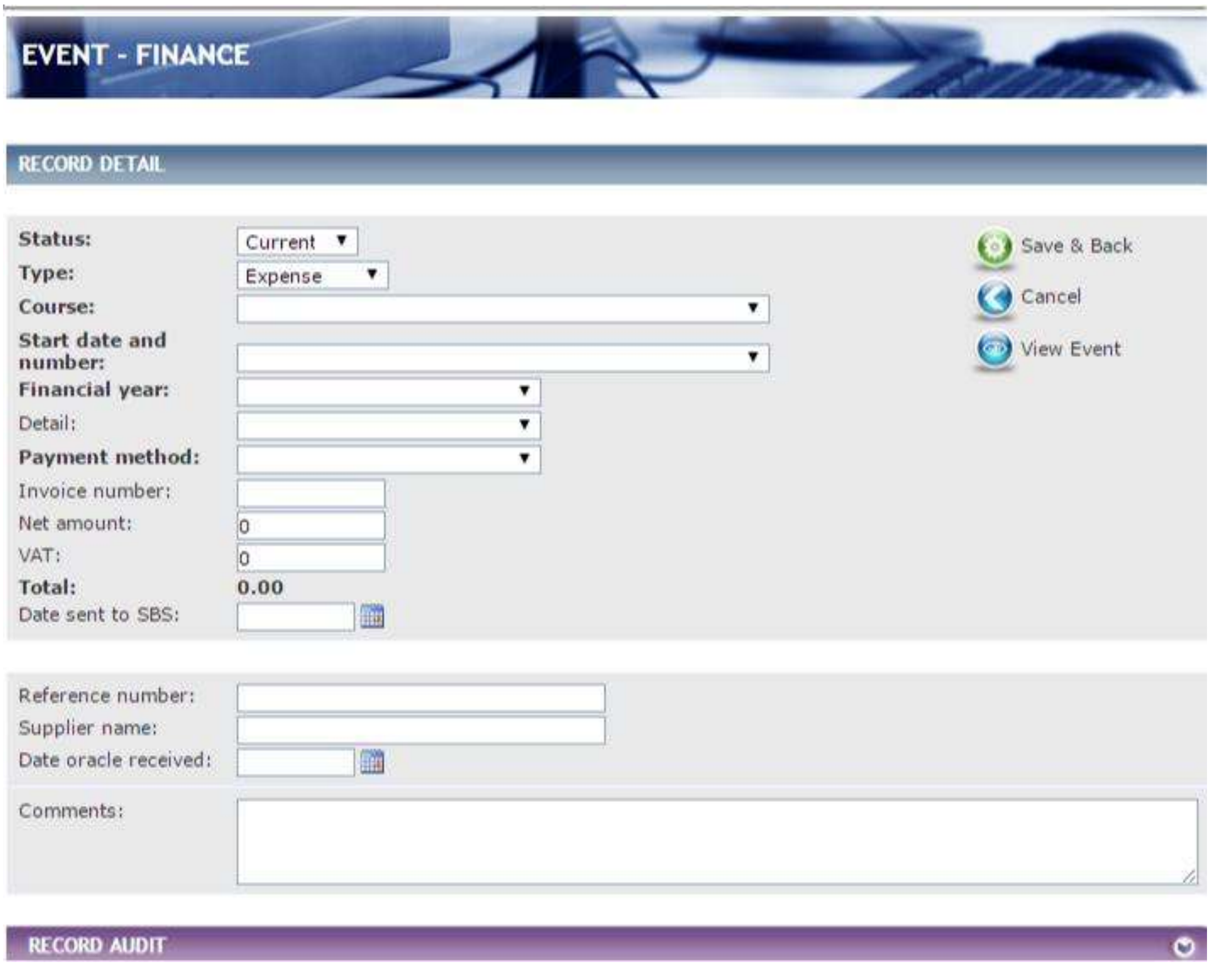


Fig 7.9 Event – finance screen

Complete the details as follows:

- Select the **Course, Start date** and **number**, **Financial year**, **Detail** (populated from reference table Finance – Detail type) and the **Payment method.**
- Enter **Invoice number**, **Net amount**, **VAT, Date sent to SBS**, **Reference number**, **Supplier name** and **Date oracle received**.
- Enter any relevant **Comments.**

Click **Save & Back.**

12.4 Merge Person

This section allows administrators to merge duplicated person records. To merge person within **Data Entry** menu click on **Merge Person.**

Please note that this function was not previously available to PEC administrators in V1 but is available to PEC administrators in V2.

The **Merge Person** screen is displayed.

Fig 8.16 Merge person screen

Complete the following:

There are two sections containing lists of all people.

Within the first section **People – Master Record** enter the surname of the person's record that you wish to keep, click on search. All matches will be returned and display within the field, in the area outlined in red in Fig 8.16 above.

Person's record that you wish to merge with the selected master record, click on search. All matches will be returned and display within the field, in the area outlined in orange in Fig 8.16 above.

Once you have found the people you wish to merge click in the tick-box to the right to the person details in both the master record and the record to be merged.

Click the **Next** button.

The **Merge Person (cross-reference)** screen is displayed.

In the two records below, select which field from each you wish to remain in the resulting merged record

Email address:	four@example.com	Student40@example.com
Clinician?:		Yes
Delegate type:	Any deleg	Consultants
Delegate type (other):		
Job title:		
Title:		Miss
Surname:	Student	Student F
Forenames:	Four	Forty
Known as (forename):		
Sex:		
Date of birth (dd/mm/yyyy):	21/05/1987	
Telephone:	01215 41	07800930071
Address type:	Home	Home
Address 1:	AddressLine1	AddressLine1
Address 2:	AddressLine2	AddressLine2
Address 3:	AddressLine3	AddressLine3
Post town:	PostTown 6	PostTown 1
County:		hampshire
Post code:	GU24 0BL	GU24 0BL
Training number:	555555	
Training start date (dd/mm/yyyy):		
Training completion date (dd/mm/yyyy):		
Grade:		
Place of work:	Great Ormond Street	
Place of work (other):		
Specialty:	ACCS - Emergency Medicine	
Educational supervisor:	Ed Supervisor	
Educational supervisor email:	EdS@example.com	
Registration type:	GMC	
Registration number:	125487	
Trust name:	Brookwood	
Trust name (other):		
Band:	1	
Dietary requirements:	allergic to nuts	
Personal biography:		
Notes:		

Previous Merge

Fig 8.17 Merge Person (cross-reference) screen

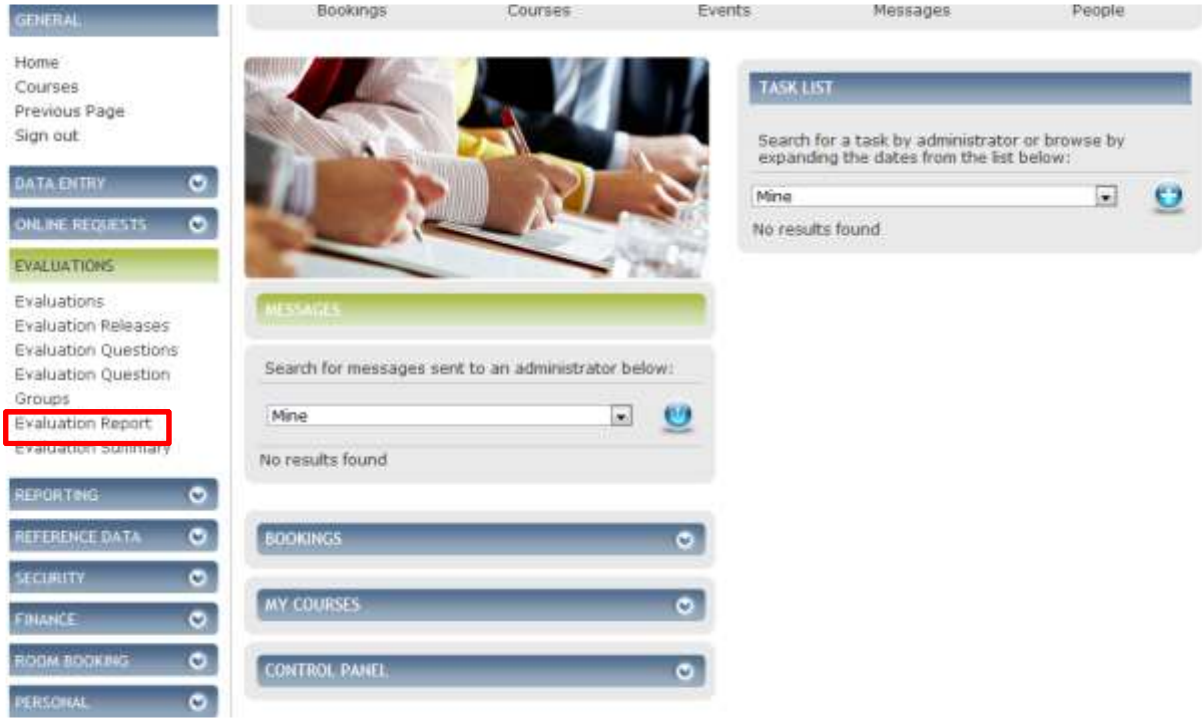
Here you can select which option from each record you wish to keep or discard by clicking on the circle next to each individual detail.

Note, should you wish to go back to the previous screen with making no changes click on **Previous** or if you have finished making the relevant changes click on **Merge,** in the area outlined in red in Fig 8.17 above.

13 Evaluations

There is one type of evaluation available to the Administrator to select on the event which is 'Course Evaluation Feb 14.'

When delegates have completed their evaluations, completed feedback can be found by selecting 'Evaluation Report' from the Evaluations menu:



You will then be taken to a list of search results listing the reports for all courses. You can select your report by clicking on the blue arrow.

SEARCH RESULTS

Click on one of the releases in the list to export it to Excel.

Evaluation	Course	Course dates	Category	Target audience	Date	Due date
Test Dee Eval for m March 2015	Test Dee 16 March Course on Writing	02 Apr 15	category name here		17/03/2015	23/03/2015
Test Dee Eval for m March 2015	Dee April Biscuit T EST course	29 Apr 15	category name here		29/04/2015	27/04/2015
Dental Evaluation	Dental testing final	21 Oct 15	Section 63		21/10/2015	28/10/2015
Dental Evaluation	Dental testing final	29 Oct 15	Section 63		21/10/2015	28/10/2015
Dental Evaluation			Section 63			27/11/2015
Tests			Demo			30/04/2014
Tests	Manual Release		Demo	Course Attendees	20/01/2015	30/05/2014
Tests	Physiology 2 (Applied Physiology of Hypoxia & Hypercapnia)/Anatomy 3 (Abdomen & Pelvis)	27 Feb 15	Demo		27/02/2015	11/03/2015
Tests	Trauma Response	26 May 15 - 28 May 15	Demo		26/05/2015	18/05/2015
Eval summary	ALEX TEST 2	15 Jul 15	Eval summary		16/07/2015	23/07/2015
Jo's feedback for m	Train the Trainer	11 Feb 15	test		11/02/2015	17/02/2015

Appendix 1

CMS V1 had previously automatically created unique codes for each course. In V2 this must be done manually. HEEoE have created the following coding convention for each PEC to follow.

To generate the **Course/Conference number** please follow the convention below:

CAT/PEC/Date/Type**-000.eoe**

CAT -Course category

Course category	Code
Adhesive Dentistry	AD
Aesthetic Techniques	AT
Clinical Governance, Audit and Research	CGar
Communication Skills	CSc
Computing and I.T	CIT
Conservative Dentistry	CD
Cross Infection Control	CIC
Dental - Alveolar Surgery	CAS
Diagnosis and Treatment Planning	DTP
Diploma Training e.g. MFGDP	DT
Endodontics	ED
Forensic Dentistry	FD
General Medicine/Surgery	GMS
Health and Safety	HS
Implants	IM
Life Support/CPR	LS
Medico-Legal/Ethics	ML
Miscellaneous	Misc
NHS Management Organisations	NMO
Occlusion and TMJ	OTMJ
Oral and Maxillofacial Surgery	OMS
Oral Medicine	OM
Orthodontics	OD
Paediatric Dentistry	PD
Pain Management	PM
Periodontics	PE
Pharmacology	PH
Practice Management/Development	PMD
Preventative Dentistry	PRD
Prosthodontics	PR
Radiology	RA
Sedation	SE
Training Trainers	TT
Worn Detention/Surface Loss	WD

If there are any courses which come under a category not featured in the table above please email the Dental Data Administrator.

PEC- Codes

PEC	Code
Basildon	BAT
Bedford	BH
Cambridge	CUH
Colchester	CHU
East and North Herts	ENH
Great Yarmouth	JP
Harlow	PAH
Health Education East of England	HEEoE
King's Lynn	QEKL
Ipswich	IH
Luton & Dunstable	LD
Norfolk and Norwich	NNUH
Peterborough	PSH

Date

Date should be formatted as per the following:
DDMMYY – 080915

Course type

S63 – Section 63
OAC – Other approved course

Event code

The second part of the coding convention -000.eoe is to be entered only under the event. The system will require you to enter the course code in the event add the following to the end:

-000.eoe – for the first event please enter 001, the second event 002 and as follows.

For example:

Course Code: DTP/CUH/011015/S63
Event Code: DTP/CUH/011015/S63-001.eoe