



# Course Manager V2

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## Administrator User Guide

**Hicom Technology**  
**Version 1.00**

March 2013

Course Manager is an online system designed to manage Courses and bookings for trainees. It forms part of the Intrepid HR software suite used to administer training, education and career progression in the healthcare sector.

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# Distribution

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Although this user guide is expected to be distributed across the Administrator user base, this document is confidential and must **not** be made available publically or distributed to persons outside of your organisation.

# 1. Introduction

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This user guide is the complete Administrator user Guide for Course Manager. It is designed to detail all functionality within the system from an Administrators perspective.

# 2. Course Manager Overview

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The new Course Manager system builds on the success of the original course manager and adds significant functionality to it. Events can now be broken down into separate sessions spanning one or more days. Delegates can submit cancellation requests online, email administrator's questions about courses and Administrators themselves can process bookings, messages and tasks directly from the home page.

Development of the system will continue with more features being added in future releases and this guide will be updated to include details of them.

### 3. Administrator Home Page

The Administrator home page is broken up into 5 sections.

- Notification Bar (very top of the screen)
- Menu items (left hand side)
- Admin Control Bar (near the top with five icons)
- Comms, Bookings, My Courses and Control Panel widgets (centre left)
- Task List (centre right)

The screenshot shows the administrator home page for the Intrepid course booking management system. At the top left is the system logo and name, and at the top right is the NHS South of England logo. Below the logos, the user is signed in as 'angela.blyth1@nesc.nhs.uk' and has 0 unread messages. The page is divided into several sections: a left-hand navigation menu with categories like GENERAL, DATA ENTRY, SECURITY, PERSONAL, and FINANCE; a central area with five main widgets: Bookings, Courses, Events, Messages, and People; a 'COMMS' section with a search for messages sent to administrators; a 'TASK LIST' section with a search for tasks by administrator or date; and a bottom section with buttons for BOOKINGS, MY COURSES, and CONTROL PANEL. The Hicom Technology logo is at the bottom left.

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#### Notification Bar

This contains the currently logged in user on the left and number of unread messages on the right.

## Menu items

These direct you to the various pages within the system. As you click on a menu item, 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'.

## Admin Control bar

The items that appear on this list are selected from within Roles inside the Security menu. At the bottom of the Role page you may select up to five icons and the order.

## Comms, Bookings, My Courses and Control Panel

**Comms** - displays all messages that have not been read by the currently logged in user.

**Bookings** – displays all Bookings that have a status of 'Pending' or have yet to be marked as actioned.

**My Courses** – displays all Courses where the logged in user is set as the owning Administrator

**Control Panel** – displays shortcuts to Administrator functions. These are set using the Role within security.

## Task List

The list on the right shows all Tasks for all Courses that the logged in Administrator is responsible for. This drop down is located on the Course Detail page of each Course.

New Tasks can be created from the list by clicking on the plus icon. To brown another Administrators task list, select them from the drop down list.

A private task cannot be viewed by another administrator browsing your task list.

## 4. Data Entry - People

---

Every delegate that has registered on the system is displayed here. The filter at the top can be used to search for a specific individual. Clicking on a Person will open their record and give access their details.

### 4.1 Data Entry - People

---



Every delegate that has registered on the system is displayed here. The filter at the top can be used to search for a specific individual. Clicking on a Person will open their record and give access their details.

## 4.1.1 Data Entry – Person – Personal Details

---

The Account details are held within a collapsible panel at the top of the page. From within there, a person's email address can be changed, or their password reset. If you wish to disable or enable their account, it is done from here. Comments can be recorded if needed.

The Personal Details occupies the rest of the page. Details can be changed here as needed.

At the bottom of the page is a list of person types. This can be used when a speaker or lecturer is placed on the system and using person type can be marked as such.

## 4.1.2 Data Entry – Person – Courses & Conferences

---

All bookings made by or for this delegate will be displayed here. The filter at the top of the page can be used to filter the bookings. Click on a booking to enter the record. See Data Entry – Bookings under section 0 for details

## 4.1.3 Data Entry – Person – Components

---

Any components which belong to a Course that this delegate has booked onto will be displayed here.

## 4.1.4 Data Entry – Person – Actions

---

Actions can be created against the person and saved here. A list of previously saved actions will show on this page and new actions can be created by clicking the 'New Action' button. Actions can be given a resolution date together with a resolution.

## 4.1.5 Data Entry – Person – Email Logs

---

Emails are sent to the candidate automatically via the system when bookings need to be paid for or evaluations must be completed. A record of every email sent to the delegate is shown here. Use the filter as needed or search for the email subject directly.

Click on the email to display it.

## 4.1.6 Data Entry – Person – Audit Trail

---

Changes to the Person record can be searched for within the Audit Trail. If a field is changed within the system, the change will be audited and the old and new values of the field can be displayed through this audit.

## 4.2 Data Entry – Courses & Conferences

---

The full Course list is displayed here. Courses can be searched for via the filter, or a new course can be created by clicking on the New Course button.




### 4.2.1 Data Entry – Courses & Conferences – Course Detail

---

The Course Detail page is the primary course page. Many items completed on this page will be inherited by Events when they are created.

## COURSE

### RECORD DETAIL

Course number:	Status:	Current	 Save
Administrator:			 Cancel
Co-ordinator:			 Copy
Director:			
Cost centre:			
Course/Conference title:	Created date:	05/03/2013	
Owner:	Review date:		
Category:	Version:		
Venue type:	Publish:	<input type="checkbox"/>	
Old course number:	Observations required:		
Length:	CPD:		
Delegates min:	Location:		
Max:	Certificate:		
Waiting list:			
Information only:	Accommodation:	<input type="checkbox"/>	
Issue certificate:	Display programme:	<input type="checkbox"/>	

The following fields are of particular interest

**Administrator** – The Administrator overseeing the Course. Messages, Tasks and Bookings made to or against this Course or its corresponding Events will appear on the Administrator Home page (see section 3.) for the selected Administrator.

**Owner** – The selected owner of the Course decides which budget this Course will be part of. When creating a budget within finance (see section 0.), the Courses and Events displayed will be the those which have a matching Owner.

**Publish** – The Course is not visible on the Courses and Conferences list until it is published.

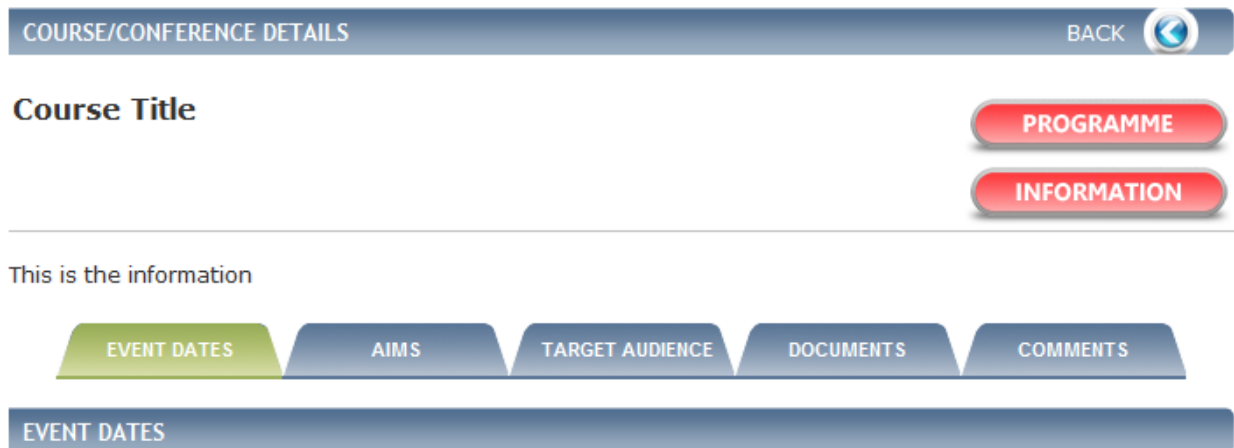
**Aims** – Appears to the Delegate here



### AIMS

These are the aims

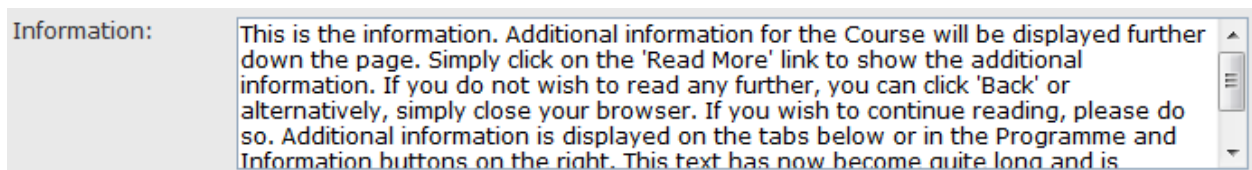
**Information** – Appears to the Delegate here




The information supports the use of a break character which appears to the left of Z on the UK keyboard. To display it within the information, press shift and then the key. It looks like this |

When completing the information, the example below shows the effect of using this character. Firstly, normal text appears as so

### Course Detail



## Course from the Delegates perspective


COURSE/CONFERENCE DETAILS BACK 

**Course Title** PROGRAMME  
INFORMATION

This is the information. Additional information for the Course will be displayed further down the page. Simply click on the 'Read More' link to show the additional information. If you do not wish to read any further, you can click 'Back' or alternatively, simply close your browser. If you wish to continue reading, please do so. Additional information is displayed on the tabs below or in the Programme and Information buttons on the right. This text has now become quite long and is pushing the tabs on the page futher down which can begin to look untidy.



If you exceed 100 words, it will automatically insert a 'Read more' link as shown below.

COURSE/CONFERENCE DETAILS BACK 

**Course Title** PROGRAMME  
INFORMATION

This is the information. Additional information for the Course will be displayed further down the page. Simply click on the 'Read More' link to show the additional information. If you do not wish to read any further, you can click 'Back' or alternatively, simply close your browser. If you wish to continue reading, please do so. Additional information is displayed on the tabs below or in the Programme and Information buttons on the right. This text has now become quite long and is pushing the tabs on the page futher down which can begin to look untidy.

[... read more](#)



Clicking on the 'Read more' link displays the rest of the text

COURSE/CONFERENCE DETAILS BACK 

**Course Title** PROGRAMME  
INFORMATION

This is the information. Additional information for the Course will be displayed further down the page. Simply click on the 'Read More' link to show the additional information. If you do not wish to read any further, you can click 'Back' or alternatively, simply close your browser. If you wish to continue reading, please do so. Additional information is displayed on the tabs below or in the Programme and Information buttons on the right. This text has now become quite long and is pushing the tabs on the page futher down which can begin to look untidy. Use of a break character can help to break up the text.

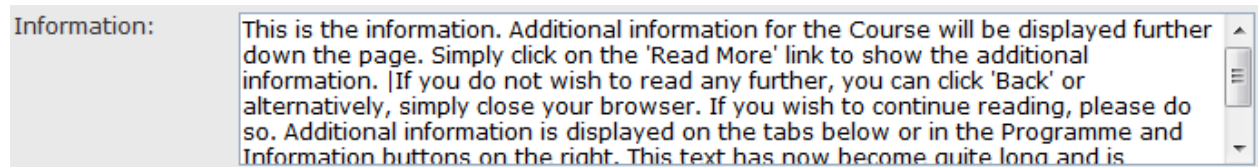
[... read less](#)



This 'Read more' link can be triggered manually using the break character mentioned above.

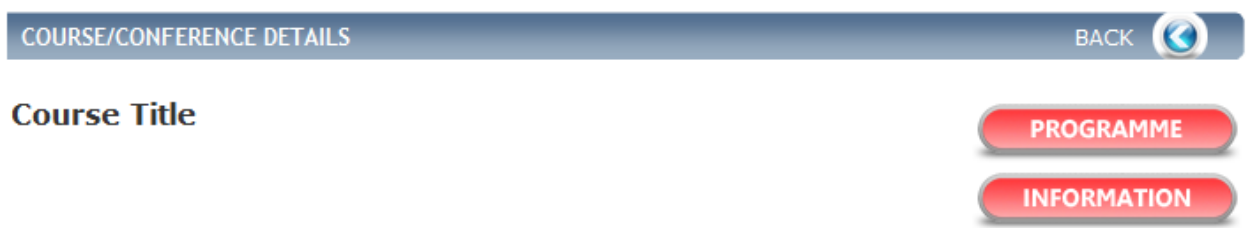
## Course Detail

Note the character appearing after the word 'information' at the beginning of the third line



## Course from the Delegates perspective

The Course now looks like this



This is the information. Additional information for the Course will be displayed further down the page. Simply click on the 'Read More' link to show the additional information.

[... read more](#)



And clicking on the 'Read more' link opens the rest of the Course information



This is the information. Additional information for the Course will be displayed further down the page. Simply click on the 'Read More' link to show the additional information. If you do not wish to read any further, you can click 'Back' or alternatively, simply close your browser. If you wish to continue reading, please do so. Additional information is displayed on the tabs below or in the Programme and Information buttons on the right. This text has now become quite long and is pushing the tabs on the page further down which can begin to look untidy. Use of a break character can help to break up the text.

[... read less](#)




Additional formatting is possible too

## Course Detail

Information:	This is the information. Additional information for the Course will be displayed further down the page. Simply click on the 'Read More' link to show the additional information.   {br}{br} If you do not wish to read any further, you can click 'Back' or alternatively, simply close your browser.
--------------	---

## Course from the Delegates perspective

COURSE/CONFERENCE DETAILS BACK 

**Course Title** PROGRAMME  
INFORMATION

---

This is the information. Additional information for the Course will be displayed further down the page. Simply click on the 'Read More' link to show the additional information.

If you do not wish to read any further, you can click 'Back' or alternatively, simply close your browser.

If you wish to continue reading, please do so. Additional information is displayed on the tabs below or in the Programme and Information buttons on the right. This text has now become quite long and is pushing the tabs on the page futher down which can begin to look untidy. Use of a break character can help to break up the text.

[... read less](#)

EVENT DATES   AIMS   TARGET AUDIENCE   DOCUMENTS   COMMENTS

## 4.2.2 Data Entry – Courses & Conferences – Events

---

From here, Events belonging to the Course can be seen and new Events created. To create a new Event click on 'New Event'. For details of the Event screens refer to section 4.3

## 4.2.3 Data Entry – Courses & Conferences – Delegates

---

A list of all delegates who have a booking status against this course (from confirmed to cancelled). A new delegate can be added by clicking on 'New delegate' and completing the booking. For details of the Booking screen, refer to section 4.4

## 4.2.4 Data Entry – Courses & Conferences – Components

---

All components are shown on the Component list with the 'New Component' button used to create a new one.

## 4.2.5 Data Entry – Courses & Conferences – Actions

---

Actions are recorded here. New actions require a Title, description and a resolution (with date). Saved actions can be viewed and searched for on the list.

## 4.2.6 Data Entry – Courses & Conferences – Hyperlinks

---

To be completed

## 4.2.7 Data Entry – Courses & Conferences – Resources

---

Resources can be added to the Course. The resource reference table lists all available resources. Add one to the course by clicking on the New resource button.

## 4.2.8 Data Entry – Courses & Conferences – Successors/Predecessors

---

If a Course is superseded by another, you can make the preceding Course here. Or alternatively, you can visit the Preceding course and enter its successor. Select the Link type, order and the relevant Course from the drop down.

Entering a Successor or Predecessor against a Course does not populate the reverse status for the other Course.

## 4.2.9 Data Entry – Courses & Conferences – Grades/Bands

---



To be completed

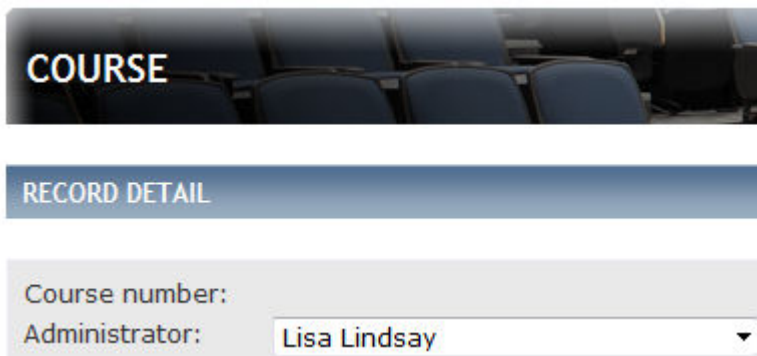
## 4.2.10 Data Entry – Courses & Conferences – Tasks

---

Tasks entered against the Course automatically inherit to any Events created against them. These tasks are designed for the benefit of Administrators who need to fulfil certain tasks when running a Course, such as booking accommodation for candidates or taxis from venues.

These tasks can be entered against a Course (or Event, see Section 4.3.13) and will then appear in the Task list of the Administrator who is marked against the Course

In the example below, Lisa is marked as the Administrator for the Course




The screenshot shows a user interface for course management. At the top, there is a dark blue header with the word "COURSE" in white. Below this is a light blue bar labeled "RECORD DETAIL". Underneath, there are two input fields: "Course number:" followed by a text box, and "Administrator:" followed by a dropdown menu. The dropdown menu is currently open, showing "Lisa Lindsay" as the selected administrator.

On the Administrator Home Page (see section 3), her task list will show tasks for this Course on the date they are due.

### TASK LIST

Search for a task by administrator or browse by expanding the dates from the list below:

Mine 

- Thursday 31 January 2013 (1)**
  - Book Taxi for Course
- ▼ **Wednesday 06 February 2013 (2)**
- ▼ **Thursday 07 February 2013 (3)**
- ▼ **Thursday 14 February 2013 (1)**
- ▼ **Wednesday 20 February 2013 (4)**
- ▼ **Thursday 28 February 2013 (1)**
- ▼ **Thursday 21 March 2013 (1)**
- ▼ **Friday 31 May 2013 (1)**
- ▼ **Sunday 30 June 2013 (29)**

## 4.2.11 Data Entry – Courses & Conferences – Audit Trail

---

To be completed

## 4.3 Data Entry - Events






---

Allows you to view and configure Event details. There are a number of sub-menu items within.

### 4.3.1 Data Entry – Events – Event Detail

---

The Course/Conference is shown, together with the Start Date, End Date and times. The Event Status is used to show the current status of the Event. When it is Published, delegates can view it on the website.

Course / Conference:	<b>Consultant Faculty Day</b>	Status:	Current ▾	 Save
Event number:	<input type="text"/>			 Cancel
Start date:	23/09/2013 	Time:	09 : 00	 Copy
End date:	25/09/2013 	Time:	17 : 00	
Event status:	Not Ready ▾			

The maximum number of delegates, those booked, confirmed, remaining and attended are shown here. The waiting list is used to decide the number of 'waiting' places that are available, should a delegate book on the Course after the maximum number of delegates is reached. If a delegate cancels their booking, an Administrator can select someone from the waiting list in their place.

Delegates max:	<input type="text" value="10"/>	Delegates remaining:	
Waiting list:	<input type="text" value="5"/>	Delegates attended:	
Delegates booked:		Evaluation:	▾
Delegates confirmed:		Accommodation:	<input type="checkbox"/>

The site selected from the drop down will be visible to the Delegate when viewing the Event. The Venue is specific location within the site (normally a room). The number of CPD days/points is also shown here.

Site:	Lewes Victoria Hotel ▾	Venue:	Saul Michelle Hall ▾
Address 1:	<b>Nevill Road</b>	CPD:	18 <input type="text"/> point(s) ▾
Address 2:	<b>Lewes</b>		
Address 3:	<b>East Sussex</b>		
Post town:			
County:			
Post code:	<b>BN1 1PF</b>		

Budget and expenses are shown here. Items can be added using the Ad-hoc finance sub-menu item on the left (see section 4.3.10)

Invitation only:	<input type="checkbox"/>	Request key benefits:	<input checked="" type="checkbox"/>
Online booking:	<input checked="" type="checkbox"/>	Online payment:	<input checked="" type="checkbox"/>
Display available places:	<input checked="" type="checkbox"/>	Display programme:	<input checked="" type="checkbox"/>
Display max delegates:	<input checked="" type="checkbox"/>	Hide event date/time:	<input type="checkbox"/>
Allow booking after start date:	<input checked="" type="checkbox"/>		

## 4.3.2 Data Entry – Events – Fee & Delegate Type

Course Manager V2 supports variable fee's against delegate types. You can enter a specific fee by clicking on the 'New fee' button. Select your fee type from the drop down and enter the value of the fee. Next, select all the Delegate types that the fee relates to. When you are done, you can complete the number of places for each delegate type and click save.

This facility allows you to enter more places for different delegate types than the maximum allowed on the course, but the maximum will still apply.

For example, if you have a maximum of 20 places on a Course, you could add a Course fee and assign it to Dental Technicians, Nurses and Foundation Trainee's with 10 places available for each delegate type.

This means that no more than 20 delegates may book a place on the Course and no more than 10 of each type. So you may have 10 Dental Technicians, 5 Nurses and 5 Foundation Trainee's or you could have 10 Nurses and 10 Foundation Trainee's.

### 4.3.3 Data Entry – Events – Requirements

---

Course requirements are shown on this page (Course requirements inherit to the Event). Event requirements can be added here. Delegate requirements are a combination of the two, and shown for each delegate.

### 4.3.4 Data Entry – Events - Sessions

---

Sessions can be used to break down an Event into separate parts over one or more days. The simplest example is an event with a morning and afternoon session.

However, the Event could be five days long and span three different locations. Using sessions, the dates, times and locations can be recorded which will be visible to the delegate when viewing the course.

### 4.3.5 Data Entry – Events – Event Options

---

If an Event has additional options available to delegates such as lunch, parking permit, even a book on the course subject, 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 Course.

### 4.3.6 Data Entry – Events - Delegates

---

Delegates that have a status against the Event (anything from confirmed to cancelled) will be shown here. Bookings can be viewed by clicking on the delegate and messages can be sent by ticking the check boxes next to each and clicking the 'Send Message' button.

### 4.3.7 Data Entry – Events - Accommodation

---

Accommodation functions in the same way as Event options. New accommodation can be added along with the cost and this will be shown to the delegate when they book their place.

### 4.3.8 Data Entry – Events - Components

---

A breakdown of the components of the Course can be entered here along with start and end times. This is shown on the Course Programme which delegates can view by clicking the 'Programme' button in the corner of the Course or Event.

### 4.3.9 Data Entry – Events - People

---

To be completed

### 4.3.10 Data Entry – Events – Ad-hoc finance

---

Additional Incomes and Expenses can be added directly against an Event using the Ad-hoc finance sub-menu. Click 'Add Income/Expenditure' and then select income or expenditure from the 'type' drop down. Once selected, several drop downs will appear for completion.

### 4.3.11 Data Entry – Events – Actions

---

Actions that are to be completed against the Event are shown here. An Action might be an issue that has arisen, such as the room initially booked for the event being unavailable. Once a new room has been found, the resolution date and resolution can be entered against the Action.

### 4.3.12 Data Entry – Events – Email Logs

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To be completed

### 4.3.13 Data Entry – Events – Tasks

---

Tasks created against the Event will be automatically assigned against the Administrator that has been selected against the Course. Newly created tasks can be assigned to an alternative Administrator instead. These tasks function the same way as tasks against Courses (see section 4.2.10).

## 4.3.14 Data Entry – Events – Audit Trail

---

To be completed

## 4.4 Data Entry - Bookings

---

A Booking is an instance of a delegate either booking a place against a course, or showing an interest. The booking status may change, such as from 'booked' to 'confirmed' or from 'confirmed' to 'cancelled'. Details of the booking, including fees paid, can be viewed by clicking on it in the list.

### 4.4.1 Data Entry – Bookings – Booking

---

The Booking Summary and record detail show the main elements of the booking. The fees paid, status, the course that the booking relates too together with the date of the Event and if the delegate has attended or not.

### 4.4.2 Data Entry – Bookings – Requirements

---

The requirements are shown here and are formed of Event requirements and any Course requirements that the Event inherited. As the requirements are completed, an Administrator can enter each one and mark it as such.

### 4.4.3 Data Entry – Bookings – Accommodation

---

New accommodation information can be entered here. If the delegates accommodation requirements change after the booking is made and paid for, they can be adjusted in here.

### 4.4.4 Data Entry – Bookings – Event Options

---

Event options work in a similar way to Accommodation, with new Event options being added or current ones being edited as needed.

## 4.4.5 Data Entry – Bookings – Actions

---

Actions against the booking can be used in a similar way to Actions against the Person (see section 4.1.4), the Course (see section 4.2.5) or the Event (see section 4.3.11).

## 4.4.6 Data Entry – Bookings – Email Logs

---

To be completed

## 4.4.7 Data Entry – Bookings – Audit Trail

---

To be completed

## 4.5 Data Entry - Tasks

---

Tasks can be created either against a Course or an Event. Tasks created against a Course can be inherited by the Event by ticking the 'Copy to all events' tick box. The Task will be assigned to the Administrator managing the Course (or Event) automatically. This Administrator will then see the Task on their task list when they log in.

Tasks can be created from the Task list in an ad-hoc fashion by selecting 'New Task'. If a task is selected to be a private task, it is hidden from other administrators can will not appear in the list.

When a task is completed, mark it as completed and it will disappear from the list.

## 4.6 Data Entry - Messages

Messages are a key element of Course Manager. The Message page shows a list of all messages sent and received within the system. The filter at the top of the screen can be used to filter the messages in both sections, or the 'New Message' button will open an empty message.

The screenshot shows the 'MESSAGES' interface. At the top is a dark header with the word 'MESSAGES' in white. Below this is a blue navigation bar with 'SEARCH' on the left and a 'BACK' button with a left arrow icon on the right. The main content area is a light grey filter panel. It includes fields for 'Subject:', 'Sent to:', 'Sent date from:', 'Received from:', 'Received date from:', 'Show deleted:' (with a dropdown set to 'No'), 'Course / Conference:', 'Course event:', and 'Message read:' (with a dropdown set to 'No'). There are also 'Search' and 'Clear' buttons. Below the filter panel are two blue navigation bars: 'RECEIVED' on the left and 'NEW MESSAGE' with a plus icon on the right. Under each of these bars, the text 'No results found' is displayed.

When creating a new message the process is made up of three elements.

**Message Type:** The first is to decide if the message relates to a Course, Event or Person. If its for an Event, select that from the 'Linked to' drop down and select the Course and then Event that it relates to. This will give you a list of users who have a booking status against the event allowing you to message some or all of them.

If you were to select Person then you can filter by delegate type if you wish.

**People:** Once you have a list of people beneath, simply click the check box next to the names of each delegate you wish to send the message to.

**Message:** The final step is to compose the message itself and click Send. Templates are available (if created from the Templates reference table).



## 5. Online Requests


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At the bottom of the website is a Feedback link. This allows delegates to submit feedback that they wish


### 5.1 Online Requests - Feedback

---

At the bottom of the website is a Feedback link. This allows delegates to submit feedback that they wish to convey either about the website or the Course they attended. The feedback recorded is shown in a list and can be acknowledged by opening the record and ticking the box in the corner. No message is sent to the delegate when feedback is acknowledged.



The screenshot shows a 'FEEDBACK' header with a globe and a hand icon. Below it is a 'RECORD DETAIL' section. The record includes an 'Acknowledged' checkbox, a 'Status' dropdown set to 'Current', and 'Save' and 'Cancel' buttons. The feedback text is: 'I wanted to say that the new system looks really good. I like the layout and additional functions. Well done.'

Acknowledged:	<input type="checkbox"/>	Status:	Current	 Save
Date/Time:	04/03/2013 13:45:50			 Cancel
Email address:	intrepid@hicom.co.uk			
Registered user:	Nathan Ives			
Subject:	New system			
Details:	I wanted to say that the new system looks really good. I like the layout and additional functions. Well done.			

### 5.2 Online Requests - Cancellations

---

If a delegate cancels their place on a Course, the cancellation request is displayed here. This enables Administrators to process the request by going to the booking and cancelling it

# CANCELLATIONS

## RECORD DETAIL

Request from:	<b>Janice</b>	Status:	<b>Current</b>	 Save
Requested date:	<b>24/09/2012</b>			 Cancel
Course title:	<b>A Balloon Flight Course</b>			 Booking
Event date:	<b>12 Oct 12 - 13 Oct 12</b>			
Booking reference:	<b>2647</b>	Fee type:		
Registered date:	<b>24/09/2012</b>	Fee:	<b>0</b>	
Booking status:	<input type="text" value="Booked"/>	Total cost:	<b>0</b>	

Note, when setting the booking to a status of 'cancelled', the delegate will not be informed as such although the Administrator can message the delegate if they wish.

## 5.3 Online Requests – Change Requests




---

If a trainee finds their details are incorrect on the system but is unable to change them, they can submit a change request which can be viewed here. These can then be Approved or Rejected. If approved, the Person record is available by clicking on the 'Person' button



**CHANGE REQUESTS**

**RECORD DETAIL**

Reference no.:	<b>11277701</b>	Status:	Current ▾	 Save
Request from:	<b>Martin</b>			 Cancel
Email address:	<b>martin.essigman@nhs.net</b>			 User
Requested date:	<b>14/02/2013 14:44:09</b>			

## 6. Reference Data

---

Reference tables

### 6.1 Reference Data – Reference Tables

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Reference tables can be amended to control the values within drop down boxes on the system. The 'Course – Category' table for instance contains the values that appear in the Course Category drop down under Course Detail.

Items removed from this list, or marked with a status of inactive will no longer be available in the relevant drop down box but if currently in use in a field, will remain in that field until it is changed.

## 6.2 Reference Data – Content Management

---

Home page text and email webtexts that will be sent to delegates can be configured here. For example, the 'Contact us' text which is accessible at any time by clicking the link at the very bottom of the webpage, can be configured from within Content Management.

The following characters can be used as HTML within the page

{BR} – Carriage return

{B} – Open Bold

{/B} – Close Bold

## 6.3 Reference Data – System Settings

---

A number of settings can be customised from within this page. These include

- The telephone number available on the top left of the website.
- The reference that system emails will be sent from, for example 'Courses@Client.co.uk'
- Manual Password resets are bcc to:
- Settings for non payment reminders, bookings, evaluations
- Ability to close the website to new registrations or signing in

## 6.4 Reference Data – Transactions

---

Every online booking within the system is logged as a transaction. The number of included transactions within the system is available on this page, together with the start and end date for your system licence.

This page also calculates the number of transactions that the system has processed over the last 12 months and uses this to predict how many you will use over the duration of the licence and therefore, if you will need more.

Two graphs are available together in a table to show the transactions per month.

 **01234 567890**

**GENERAL**

- Home
- Courses/Conferences
- Events
- Previous Page
- Sign out

**DATA ENTRY**

**ONLINE REQUESTS**

**EVALUATION SETUP**

**REPORTING**

**REFERENCE DATA**

- Reference Tables
- Content Management
- System Settings
- Transactions

**SECURITY**

**FINANCE**

**PERSONAL**

**# ROOT USER ONLY #**



**TRANSACTION**

**TRANSACTION SUMMARY**

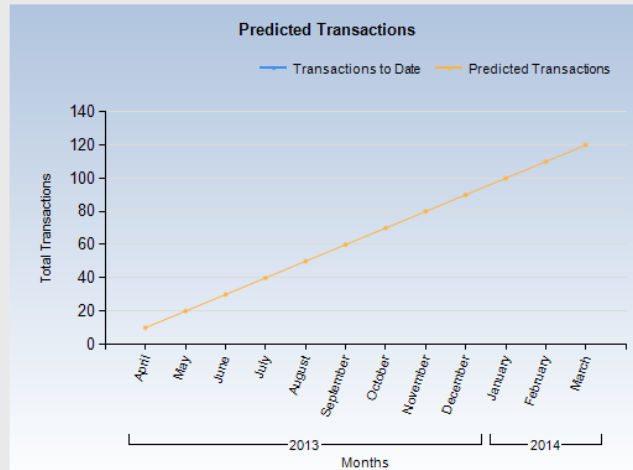
BACK 

Licence start date:	<b>01/04/2013</b>
Licence end date:	<b>31/03/2014</b>
Total number of transactions used (since licence start date):	<b>0</b>
Total number of transactions used in the last 12 months:	<b>123</b>
Predicted number of transactions that will be used within the licence period:	<b>0</b>

**TRANSACTION DATA**

▶ Predicted Transactions

▶ Transactions in Last 12 Months



Month	Transatctions
April 2013	10
May 2013	20
June 2013	30
July 2013	40
August 2013	50
September 2013	60
October 2013	70
November 2013	80
December 2013	90
January 2014	100
February 2014	110
March 2014	120

## 7. Security

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To be completed

### 7.1 Security - Administrators

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All Administrators are shown here in a list. Clicking on each one shows their record. Details can be amended from within here. Mandatory fields are shown in bold.

Account details shows the email address used to sign in to the system. If needed, the password can be reset from here.

Below this is a list of all roles that the Administrator is part of. Roles can be added or removed from here.

New Administrators can be created from the Administrator list by clicking on 'New Record' at the top of the list.

### 7.2 Security - Roles

---

Roles are a way of grouping permissions together, rather than assigning individual permissions to each Administrator. Once you have created a new role, simply add security objects to it using the drop down and the permission tick boxes. It could be that you want a particular role to have read-only access to Events, in which case you could set the permissions as such by adding the Data-Entry-Event objects with the read attribute.

You can create as many roles as you wish.

Below the security objects section are the list of users who are associated to this role. You can add as many as you wish.

Below that is the 'Control Panel – Customise' section which allows you to specify which control panel objects appear on the Control panel on the home page for users associate to this role.

The final panel 'Control Bar – Customise' is used to determine which icons appear in the Administrator Control bar at the top of the home page.

## 7.3 Security – Security Objects

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Security can be assigned against an individual page or in some cases, a section of a page. These are called security objects are shown in a list on this page. Clicking on a security object shows which roles have permissions to it and if you wish, to add more.

A full list of the Security objects and what they do are detailed in Appendix 1

## 8. Finance

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To be completed

### 8.1 Finance - Budgets

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Budgets can be created from within this page. Firstly, you must ensure that the budget year has been created against the 'Budget – Financial Year' reference table. Then, you can create a new budget and assign the budget which comes from the Course Owner reference table, to the finance year. Once done, click on Generate and a budget will be created.

The budget contains every course that is associated to the Course Owner that you have selected. Under each Course is every event that belongs to that Course.

### 8.2 Finance - Income

---

This page contains a list of all incomes within the system. Using the filter to isolate just incomes against a particular course or within a date range.

To add an additional income against an Event, click on 'New income' and then fill in the required fields.

### 8.3 Finance - Expenses

---

This page contains a list of all expenses within the system. Use the filter to isolate just expenses against a particular course or within a date range.

To add an additional expense against an Event, click on 'New expense and then fill in the required fields.

## 9. Appendix 1

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### **Data Entry**

This is the top level Data Entry menu. Access to this is required if giving access to any object beneath.

### **Data Entry-Bookings**

Gives access to the 'Bookings' menu and the list of all bookings. Clicking on one will show the Booking summary and details.

### **Data Entry-Bookings-Accommodation**

Access to the Accommodation sub-menu item of the booking

### **Data Entry-Bookings-Actions**

Access to the Actions sub-menu item of the booking

### **Data Entry-Bookings-Audit Trail**

Access to the Audit Trail sub-menu item of the booking

### **Data Entry-Bookings-Email Logs**

Access to the Email Logs sub-menu item of the booking

### **Data Entry-Bookings-Event Options**

Access to the Event Options sub-menu item of the booking

### **Data Entry-Bookings-Requirements**

Access to the Requirements sub-menu item of the booking

### **Data Entry-Courses/Conferences**

Gives access to the 'Course/Conferences' menu and the list of all Courses. Clicking on one will show the Course summary and details.

### **Data Entry-Courses/Conferences-Actions**

Access to the Actions sub-menu item of the Course

### **Data Entry-Courses/Conferences-Audit Trail**



Access to the Audit Trail sub-menu item of the Course

### **Data Entry-Courses/Conferences-Components**

Access to the Components sub-menu item of the Course

### **Data Entry-Courses/Conferences-Copy**

Allows the copying of a Course. The facility exists on the Course Details page and on the Administrator Control panel (if that item is add to a role the logged in Administrator is a member of. See section 3)

### **Data Entry-Courses/Conferences-Delegates**

Access to the Delegates sub-menu item of the Course

### **Data Entry-Courses/Conferences-Documents**

Access to the Documents sub-menu item of the Course

### **Data Entry-Courses/Conferences-Events**

Access to the Events sub-menu item of the Course

### **Data Entry-Courses/Conferences-Grades/Bands**

Access to the Grades/Bands sub-menu item of the Course

### **Data Entry-Courses/Conferences-Hyperlinks**

Access to the Hyperlinks sub-menu item of the Course

### **Data Entry-Courses/Conferences-Resources**

Access to the Resources sub-menu item of the Course

### **Data Entry-Courses/Conferences-Successors/Predecessors**

Access to the Successors/Predecessors sub-menu item of the Course

### **Data Entry-Courses/Conferences-Target Audiences**

Access to the Target Audiences sub-menu item of the Course

### **Data Entry-Events**

Gives access to the 'Events' menu and the list of all Courses. Clicking on one will show the Event summary and details.

### **Data Entry-Events-Accommodation**

Access to the Accommodation sub-menu item of the Event

### **Data Entry-Events-Actions**

Access to the Actions sub-menu item of the Event

### **Data Entry-Events-Ad Hoc Finance**

Access to the Ad-hoc Finance sub-menu item of the Event

### **Data Entry-Events-Audit Trail**

Access to the Audit Trail sub-menu item of the Event

### **Data Entry-Events-Components**

Access to the Components sub-menu item of the Event

### **Data Entry-Events-Copy**

Allows the copying of a Event. The facility exists on the Event Details page and on the Administrator Control panel (if that item is add to a role the logged in Administrator is a member of. See section 3)

### **Data Entry-Events-Delegates**

Access to the Delegates sub-menu item of the Event

### **Data Entry-Events-Documents**

Access to the Documents sub-menu item of the Event

### **Data Entry-Events-Email Logs**

Access to the Email Logs sub-menu item of the Event

### **Data Entry-Events-Event Options**

Access to the Event Options sub-menu item of the Event

### **Data Entry-Events-Fees & Delegate Types**

Access to the Fees & Delegate Types sub-menu item of the Event

### **Data Entry-Events-People**

Access to the People sub-menu item of the Event

### **Data Entry-Events-Requirements**

Access to the Event Requirements sub-menu item of the Event

### **Data Entry-Events-Sessions**

Access to the Sessions sub-menu item of the Event

### **Data Entry-Events-Target Audiences**

Access to the Target Audience sub-menu item of the Event

### **Data Entry-Messages**

Access to the Messages sub-menu item of the Event

### **Data Entry-People**

Gives access to the 'People' menu and the list of all registered delegates. Clicking on one will show the Delegate summary and details.

### **Data Entry-People-Actions**

Access to the Actions sub-menu item of the Delegate

### **Data Entry-People-Audit Trail**

Access to the Audit Trail sub-menu item of the Delegate

### **Data Entry-People-Components**

Access to the Components sub-menu item of the Delegate

### **Data Entry-People-Courses & Conferences**

Access to the Courses & Conferences sub-menu item of the Delegate

### **Data Entry-People-Documents**

Access to the Documents sub-menu item of the Delegate

### **Data Entry-People-Email Logs**

Access to the Email Logs sub-menu item of the Delegate

### **Data Entry-Tasks**

Access to the Tasks sub-menu item of the Delegate

## **Finance**

This is the top level Finance menu. Access to this is required if giving access to any object beneath.

### **Finance-Budgets**

Shows all budgets within the system

### **Finance-Expenses**

Shows all Expenses within the system

### **Finance-Income**

Shows all Incomes within the system

## **Merge Person**

This is only available on the Administrator Control Panel.

## **Online Requests**

This is the top level Reference Data menu. Access to this is required if giving access to any object beneath.

### **Online Requests-Cancellations**

Access to read Cancellations requested by delegates.

### **Online Requests-Change Requests**

Access to read Change Requests received from delegates

### **Online Requests-Feedback**

Access to read feedback received from delegates

## **Purge**

This is only available on the Administrator Control Panel.

## **Reference Data**

This is the top level Reference Data menu. Access to this is required if giving access to any object beneath.

## **Reference Data-Content Management**

All web texts and email texts are available with this object.

## **Reference Data-Reference Tables**

All reference tables are available with this object.

## **Reference Data-System Settings**

Customisable settings for the system such as the telephone number and reminder settings are grouped here.

## **Reference Data-Transactions**

This page shows details of the transactions used within the system. No data can be changed on this page.

## **Security**

This is the top level Security menu. Access to this is required if giving access to any object beneath.

### **Security-Administrators**

Access to create and remove Administrators from the system. Passwords can be reset and details changed.

### **Security-Roles**

Gives access to Role creation and assignment. Roles can be edited and security objects can be assigned.

### **Security-Security Objects**

Gives access to the Security object list to allow them to be added to roles individually.