



Maxcourse System Administration Guide

Version 4.12



Limitless · Learning

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1 Overview

1.1 User access rights

Each user account has an access rights setting which govern the restrictions of a user. There are ten different access rights.

1.1.1 Initialisation

The user account is in the process of creation; the email address used during creation has not yet been confirmed. This user has no access to the system, an account cannot be set to this access rights.

1.1.2 Lecturer

The user account is used as a lecturer for courses but the lecturer is not an active user of the site, an account cannot be set to this access rights.

1.1.3 Deceased

Setting an account to Deceased access rights will stop them from being sent any system newsletters and email and stop anyone from logging into the account.

1.1.4 Inactive user

Setting an account to Inactive user access rights will stop them from being sent any system newsletters and email and stop anyone from logging into the account.

1.1.5 Restricted user

Setting an account to Restricted user access rights will stop them from being able to book on a course, they will still be able to login, access their development portfolio and receive newsletters etc.

1.1.6 Absentee ban

Setting an account to Absentee ban access rights has the same effect as setting to Restricted user; this access right should only be used when a user has not attended an acceptable number of courses they have been booked on. The system supports the automatic identification of high absentee users (see Manager's Current issues) and the automatic restoration of their access rights back to Standard user after a set period of time.

1.1.7 Standard user

A standard user is able to search for courses, find courses using the calendar and course list and have access to their own user area to be able to:

- Update personal details
- Manage their development portfolio pages
- View their account history pages

A standard user will also be able to setup car sharing for courses they are booked on, answer evaluations and download certificates for the courses they have attended, manage their CPD portfolio and much, much more.

1.1.8 Organiser

A course organiser is able to create new courses and manage existing courses that they have created that are not live. They can also view, but not edit, courses that are being created/have been created by other organisers. An organiser can communicate by email with the users on the course through the register.

1.1.9 Operator

It is intended that this user will be a member of your departmental team and has the most limited administration rights of all the administrators. It is a suitable role for a temporary member of staff or someone who doesn't hold the level of departmental trust associated with many administrative functions.

The privacy of all users' data is maintained throughout the site for this user role. For example an operator is unable to access users' personal data without the explicit consent from the user by the use of a password key or some form of personal detail.

A course operator is able to create a new user, search for courses and users and create a new course booking over the telephone.

1.1.10 Administrator

An Administrator can handle the day-to-day running of the course booking system; they have the combined access rights of both an Organiser and an Operator. In addition they can also bypass the Operator's user partial password security, confirm cheque payments and cancel courses. They cannot approve courses or edit them once approved; they also cannot create or edit system resources such as lecturers, venues and professions.

1.1.11 Manager

A Manager handles the day-to-day management of the course booking system; they have full access to both the Operator and Organiser interfaces including the ability to authorise user balance adjustments & refund, approve and edit live courses. A manager is also able to create and edit all system resources such as lecturers, venues and professions but cannot alter course, user or system settings. Managers also have access to the newsletter & email communications and standard reporting functions of the site.

1.1.12 System manager

A System manager is able to carry out all of the functions available on the site for administering courses and users. They also have the ability to carry out system wide administration such as backing up data and setting the overall state of the site.

1.2 User modes

Not to be confused with user access rights which govern the access rights of a logged in user, User modes give access to the different administrative functions of the site.

When you login to the system you will automatically be taken to the home page of the highest mode that you have permissions for, e.g. An Organiser will see the Organiser mode home page, a Manager the Manager mode home page, etc.)

1.2.1 Guest

This user mode is the only one available before a user logs in. In this mode a user is able to search for courses and find them using the calendar and course list views. A guest user is able to view the detail of each course, add them to their basket but is unable to checkout.

1.2.2 User

This 'User mode' puts the logged in user into their user area. Here the user will be able to book a course, edit their personal details, answer evaluation questions, print off course certificates and manage their personal development portfolio.

1.2.3 Organiser

This 'Organiser mode' sets up the browser to give access to all the functions relating to creating and managing courses. A user must have Organiser, Manager or Administrator access rights to access this mode.

1.2.4 Operator

This 'Operator mode' sets up the browser to give access to all the functions for creating and managing users and enables the operator to book courses for users over the telephone. A user must have Operator, Manager or Administrator access rights to access this mode.

1.2.5 Manager

This 'Manager mode' allows the user to access all current course and user issues, communicate with all or sections or the user base, generate reports for administrative purposes, and configure system resources and settings. A user must have Manager access rights to access this mode, some features are disabled if the user is not a System manager.

1.3 Course states

The Course state defines where a course is in its lifecycle from being created through to approval and going live to being rejected or cancelled. Only the states that are relevant to the current state of a course will be available for selection.

1.3.1 Creating

The state after the course has just been created. The course is owned by its creator and remains in this state until it is submitted to be approved, the state then changed to 'Pending approval'.

1.3.2 Pending approval

The course now is waiting for approval or rejection by a manager. It is assumed that the person responsible for approval will check all course details and the suitability of the course to go live. If they are happy with it the state is changed to 'Approved' and it will automatically become live at the set live date. If the course does not meet the requirements for approval the state is changed to 'Amending' and is effectively sent back to the creator for modification, the manager can create notes on what corrections are necessary to make the course suitable. If the course will never be approved its state can be changed to 'Rejected'.

1.3.3 Amending

The course that has been submitted for approval requires amendments. Details of what changes need to be made should be included in Memo field of the course. The course organiser now has the opportunity to amend the course accordingly and resubmit it for approval.

1.3.4 Rejected

There may be times that a course has been passed between the organiser and the manager and no progress has been made. This option is intended to be used by the manager to draw a line under the course, barring it from being resubmitted.

1.3.5 Approved

If all of the criteria for a course to be live has been met the approver may approve the course to go live. A course with this state will automatically go live at the course live date.

1.3.6 Approved - Live

This is the state of a course that is approved and the course live date has passed. Standard users can now view and book on the course.

1.3.7 Live EDIT

A live course is put back into this state to allow a manager to amend the course. If the edit will produce significant changes to the course users already booked on the course should be contacted, a warning will be given and the mechanism for communication highlighted.

1.3.8 Cancelled

This is the state of a course that has been cancelled.

1.3.9 Cancelled EDIT

As with Live EDIT, a cancelled course is put into this state to allow amendments to the course.

1.4 Basic navigation

Navigation around the site is organised into five distinct areas.

The screenshot shows the Maxcourse website interface. The top navigation bar includes links for Home, Course, Support, and Contact. The main content area displays a 'Course List' with filters for regions, subjects, and dates. A table lists three courses with details such as date, title, venue, CPD hours, and cost. The right sidebar contains sections for 'Courses', 'Basket', 'No current user', and 'Your login'. The footer contains contact information and copyright details.

1. Maxcourse home page / Operator mode

2. Courses

3. Operator home / Search courses / Course list

4. Course List

5. Powered by Maxcourse 1.5

Date	Title Short description	Type	Venue, region	CPD (hours)	Cost (£)	Avail- ability
Wed 9 Mar 2011	Management and leadership (MCD-124) Explore value based leadership to overcome stress and adversity, producing an efficient, intelligent team.		Mount Somerset Hotel, Somerset	2:00	20.00	
Tue 15 Mar 2011	Digital photography in dentistry A course for dentists and DCPs on digital photography in dental practice . In addition to lectures there is plenty of hands-on ...		Gipsy Hill Hotel, Devon	7:00	100.00	
Thu 7 Apr 2011	Handling complaints (MCD-125) Learn the process for dealing face to face with someone who has a complaint		Mount Somerset Hotel, Somerset	2:00	20.00	

1. Primary navigation – These links appear on every page of the site:

- Home page – This leads to the clients main home page.
- Mode selector – For administrative staff the mode selector leads to the main administrative functions of the site.
- Home – Directs you to the Maxcourse home page.
- Course – Leads you to the course list.
- Support – Directs you to the Support FAQs of the site.

- f. **Contact** – Allows you to contact the site administration directly
- 2. **Secondary navigation** – These links are related to the mode you are in to allow you to find the links to perform the functions required.
- 3. **Breadcrumb trail** – This shows you where you are in the site and where you have come from, very useful to trace your steps when navigating deep into the system.
- 4. **Body of page** – The main area to view information, input form data and generally use the site.
- 5. **Page footer** – This information and links appear on every page of the site.

1.5 Administration access rights

Mode Feature	System Manager	Manager	Admini- strator	Operator	Organiser
Organiser Mode	✓	✓	✓	✗	✓
Create new courses	✓	✓	✓	✗	✓
View all & edit own courses	✓	✓	✓	✗	✓
Edit all non-live courses	✓	✓	✓	✗	✗
Approve courses	✓	✓	✗	✗	✗
Edit live courses	✓	✓	✗	✗	✗
Cancel courses	✓	✓	✓	✗	✗
Add users to course	✓	✓	✓ ¹	✗	✗
Operator Mode	✓	✓	✓	✓	✗
Restart	✓	✓	✓	✓	✗
Search & view courses	✓	✓	✓	✓	✗
View & edit Basket	✓	✓	✓	✓	✗
Online payment checkout ²	✓ ³	✓ ³	✓ ³	✓ ³	✗
Cheque payment checkout ²	✓	✓	✓	✓	✗
Defer payment checkout ²	✓	✓	✓	✗	✗
Create new users	✓	✓	✓	✓	✗
View user accounts	✓	✓	✓	✓ ⁴	✗
Bypass partial password security	✓	✓	✓	✗	✗
Approve balance adjustments	✓	✓	✗	✗	✗
Approve balance refunds	✓	✓	✗	✗	✗
Edit basic user details	✓	✓	✓	✓	✗
Edit user ID	✓	✓	✓	✗	✗
Edit access rights	✓	✓	✗	✗	✗
Approve profession applications	✓	✓	✗	✗	✗
Merge user accounts	✓	✓	✗	✗	✗
Manager Mode	✓	✓	✗	✗	✗
Current issues	✓	✓	✗	✗	✗
Communication	✓	✓	✗	✗	✗
Reports	✓	✓	✗	✗	✗
Course admin	✓	✓	✗	✗	✗
Settings	✓	✗	✗	✗	✗
User admin	✓	✓	✗	✗	✗
Settings	✓	✗	✗	✗	✗
System admin	✓	✗	✗	✗	✗

¹ Only available once the course has taken place.

² Optional payment method may not be enabled.

³ Operator/Administrator/Manager must be approved to make online payments, see user Access rights.

⁴ Cannot bypass partial password security (if enabled) so cannot view account unless given access by user.

2 Organiser

2.1 Current issues



This page shows any current issues with courses. These issues can be filtered to find those that are relevant to the logged in user at that time. This page is available to Organisers, Administrators and Managers.

There are two filters (filters are pre-defined parameters designed to narrow down a search):

Filter 1: Issue type

- All course issues
- Courses with Live EDIT state
- Courses with cancelled EDIT state
- Courses late in creation
- Courses waiting for approval
- Attendance requirement not met
- Not fully booked with waiting list
- With unknown attendance state

Filter 2: Issue ownership/region

- My issues
- All issues
- <region one>
- <region two>
- <region three>...



NOTE

The number of filters available is user role specific. Administrators and Managers have access to both filters, whereas Organisers can only access the first filter as they can only access courses they create.

Clicking on the titles of the resulting courses that meet the filter criteria will take the user to the course for you to take the remedial action necessary.

2.2 Create course



To create a course you must select the Organiser mode. Organisers, Administrators and Managers are able to create courses.

2.2.1 Create new course

When you click on the 'Create course' icon you will be directed to the first page of the process to create a course, see *Figure 1: Create course*.



Figure 1: Create course

Each of the fields that appear on this page is mandatory.

Course title: You must enter a course title.

Course subject: Select a subject for your course.

Course date: Enter a course date .



NOTE

Please be aware that each of these fields can be edited until the course is sent for approval.

Click on 'Create course' when the information is entered, this will save your changes and take you to the Manage course page. See *Manage course* on page 17.

2.3 Search courses



There are three distinct ways to view/search courses. By using the Search courses option or simply selecting either the Course calendar or Course list. Click this link to enter your search criteria (e.g. keywords) to find the course you need, see *Figure 2: Search Courses*.

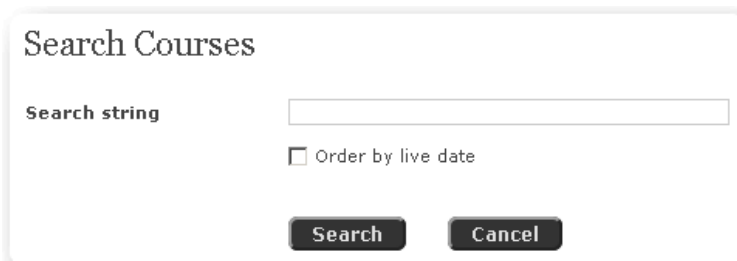


Figure 2: Search courses



NOTE

To list all courses type '*' in the search criteria. This is called a wild card character to mean 'all'.

Enter the search criteria for your search and click 'Search'. The page that displays is the 'Course match list' and will show all the courses matching the search criteria. See *Figure 3: Course match list*.

Course Match List

All courses All states All courses Go

Summary: 3 courses matching search string "Warner"

Date	Title Short description	Venue, region	State	Booked	Organiser
Fri 30 Oct 2009	Handling complaints (#125) Learn the process for dealing face to face with someone who has a complaint	Mount Somerset Hotel, Somerset	Pending approval	0 / 50	Jane Warner
Fri 23 Oct 2009	Management and leadership (#124) Explore value based leadership to overcome stress and adversity, producing an efficient, intelligent team.	Mount Somerset Hotel, Somerset	Live	0 / 50	Jane Warner
Fri 16 Oct 2009	Communicating more effectively (#123)	Not set	Creating	0 / 0	Jane Warner

Figure 3: Course match list

There are three filters available on the course match list page.



NOTE

Filter one is not available to organisers as they can only action edits and view their own courses, not those of other Organisers.

Filter 1: Course ownership/region, available to Administrators and Managers

- All my courses
- All courses
- <Region 1>
- <Region 2>...

Filter 2: Course state, available to Organisers, Administrators and Managers:

- All states
- Pre-approval
- Rejected
- Pending approval
- Approved
- Live
- Attendance not met
- With waiting list
- Cancelled

Filter 3: Date of course, available to Organisers, Administrators and Managers:

- Current courses (courses between 2 months old and 6 months in the future)
- All courses
- All future
- Last 12 months
- All historic

Clicking the course title will lead to the individual course manage page where all course edits are carried out. See *Manage course* on page 17.



NOTE

If a course does not appear check the filter settings in the Course match list.

2.4 Course calendar



The course calendar is available to use as a means of finding the course you need, see *Figure 4: Course calendar*.

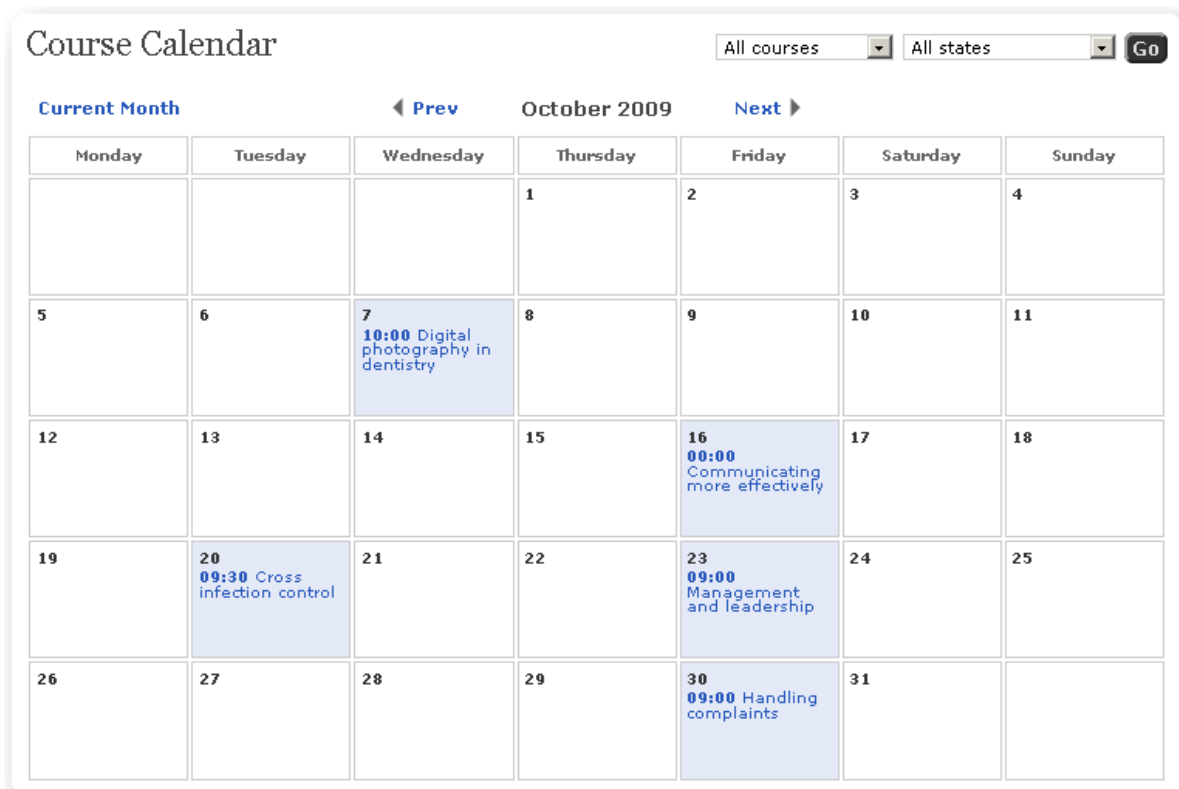


Figure 4: Course calendar

There are two filters available on the course calendar page.



NOTE

Filter one is not available to organisers as they can only action edits and view their own courses, not those of other Organisers.

Filter 1: Course ownership/region, available to Administrators and Managers

- All my courses
- All courses
- <Region 1>
- <Region 2>...

Filter 2: Course state, available to Organisers, Administrators and Managers:

- All states
- Pre-approval
- Rejected
- Pending approval
- Approved
- Live
- Attendance not met
- With waiting list
- Cancelled

Current month After navigating through the calendar clicking the 'Current month' link sets the calendar to the current month.

Prev Will move the calendar to the previous month.

Next Will move the calendar to the next month.

Clicking the course title will lead to the individual Course manage page where all course edits are carried out. See [Manage course](#) on page 17.

2.5 Course list



Click on the Course list link to get a list of all courses which meet the current filter criteria, see [Figure 5: Course list](#).

Course List

All courses All states All courses Go

Summary: 5 courses

Date	Title Short description	Venue, region	State	Booked	Organiser
Fri 30 Oct 2009	Handling complaints (#125) Learn the process for dealing face to face with someone who has a complaint	Mount Somerset Hotel, Somerset	Pending approval	0 / 50	Jane Warner
Fri 23 Oct 2009	Management and leadership (#124) Explore value based leadership to overcome stress and adversity, producing an efficient, intelligent team.	Mount Somerset Hotel, Somerset	Live	0 / 50	Jane Warner
Tue 20 Oct 2009	Cross infection control (#126)	Treliske Hospital, Cornwall	Creating	0 / 40	Tim McElwaine
Fri 16 Oct 2009	Communicating more effectively (#123)	Not set	Creating	0 / 0	Jane Warner
Wed 7 Oct 2009	Digital photography in dentistry (#127)	Gipsy Hill Hotel, Devon	Creating	0 / 20	Tim McElwaine

Figure 5: Course list

There are three filters available on the course list page.



NOTE

Filter one is not available to organisers as they can only action edits and view their own courses, not those of other Organisers.

Filter 1: Course ownership/region, available to Administrators and Managers

- All my courses
- All courses
- <Region 1>
- <Region 2>...

Filter 2: Course state, available to Organisers, Administrators and Managers:

- All states
- Pre-approval
- Rejected
- Pending approval
- Approved
- Live
- Attendance not met
- With waiting list
- Cancelled

Filter 3: Date of course, available to Organisers, Administrators and Managers:

- Current courses (courses between 2 months old and 6 months in the future)
- All courses
- All future
- Last 12 months
- All historic

Clicking the course title will lead to the individual course manage page where all course edits are carried out. See [Manage course](#) on page 17.

2.6 Manage course

The manage course page is the main page for managing all the details of your course, see *Figure 6: Manage Course*.

Manage course: #123

[View course](#)

State Creating [Edit](#)

Memo [Save changes](#)

Overview #123: Course on Communication skills, organised by Jane Warner, **venue not yet set**. With **course style not yet set**, no catering, no course info 3 and no course info 4. [Edit](#) [View](#)

Text Communicating more effectively - **No course description**
Neither course aims or objectives have been set. [Edit](#) [View](#)

Date & Time Course is a 1 day event held on Fri 16 Oct 2009, **from 00:00 till 00:00** with **0 hours CPD**. The course will go live on Fri 16 Oct with a last cancellation date of Fri 18 Sep. [Edit](#) [View](#)

Lecturers **No lecturers yet.** [Edit](#) [View](#)

Target Audience No target audience set (recommended to all). [Edit](#) [View](#)

Conditions No conditions set. [Edit](#) [View](#)

Costing Total cost of the course is £0.00 the charge per person is £0.00 with no minimum attendance, **maximum attendance not yet set**; maximum revenue is £0.00. [Edit](#) [View](#)

Documents No course documents have been added, an attendance certificate will be available. [Edit](#) [View](#)

Evaluation questions This course has 1 question and additional comments for the attendee; **1 of the MC questions has not been fully defined.** [Edit](#) [View](#)

Register There is no one booked on the course. [View all](#)

Figure 6: Manage course



NOTE

There are visual cues to help you make sure you have entered all the necessary information for a course to proceed through the course state system. **RED** visual cues are mandatory settings and **ORANGE** cues are advisory.

The ability to edit the information on this page is restricted to the 'Creation' state and the 'Live edit' state. The view link remains active so all the information is accessible in all states.

2.6.1 View course

Click this link to view the course detail as it would appear if viewing as a registered standard user.

2.6.2 State

This is the page that is used to set the approval state of the course. You cannot view all states; only those that are eligible for your permissions or are relevant to the current course state. See [Course states](#) on page 7 for a full list of course states. It is also used to test the readiness of the page, for example if you simply click on this page straight after you have created the course you will see something similar to the figure below, see [Figure 7: Edit course state - issues](#).

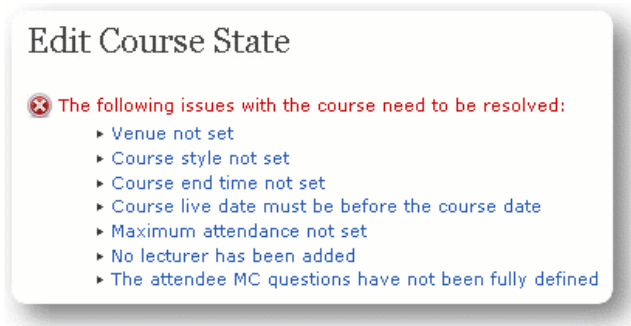


Figure 7: Edit course state - issues

Once all of the issues have been resolved then the Course state can be changed to 'Pending approval' to submit the course for approval. Having successfully set your course to 'Pending approval' it may be approved by a Manager or, if changes are required, returned to you with 'Amending' state. This and the main Manage Course page include a memo field which should detail what amendments are required, giving you an opportunity to make corrections before resubmitting for approval, see [Figure 8: Edit course state - memo](#).

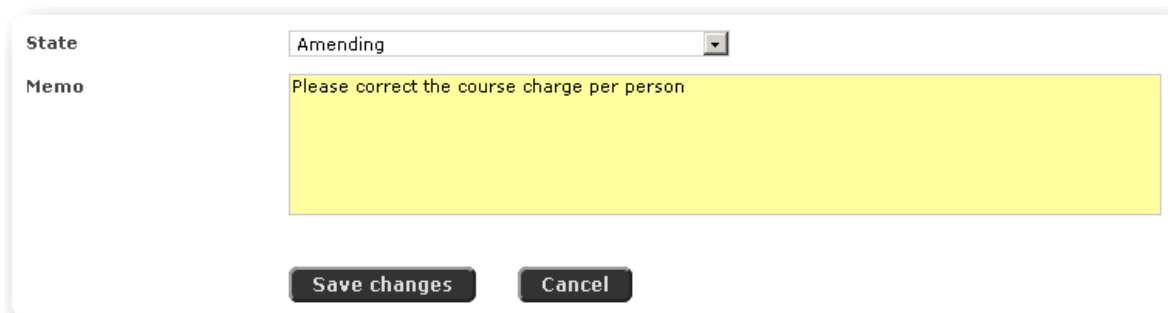


Figure 8: Edit course state - memo

If you are in a position to set the course state from the current value, click 'Save changes' afterwards and the course state will be changed.

2.6.3 Memo

This is an area for the course organiser to add comments relevant to the course that might be useful to the Manager or just as a reminder for the Organiser. This information is not visible to the standard user. Click 'Save changes' after you have added the memo, see [Figure 8: Edit course state - memo](#).

2.6.4 Overview

The course overview controls a lot of mandatory course detail, see *Figure 9: Edit course overview*.

Edit Course Overview: #123

Course ID	<input type="text" value="#123"/>	
Organiser	<input type="text" value="Warner, Jane"/>	
Venue	<input type="text" value="Select one..."/>	<input type="button" value="Request new venue"/>
Subject	<input type="text" value="Communication skills"/>	<input type="button" value="Request new subject"/>
Course style	<input type="text" value="Select one..."/>	
Catering	<input type="text" value="No catering"/>	
Course info 3	<input type="text" value="No course info 3"/>	
Course info 4	<input type="text" value="No course info 4"/>	
Booking type	<input type="text" value="Standard online booking"/>	

Figure 9: Edit course overview

Course ID: This is a unique identifier for the course. The default is the unique course key preceded with the '#' symbol. It can be changed to something else as long it is unique to the system.

Organiser: This is a drop down selection so you can change the course organiser to someone else.



NOTE

By changing the course organiser you will lose management access to this course unless you are an Administrator or Manager

Venue: Select the venue the course will be held in. Pay attention to select the best venue option, particularly if there are different room options at one venue. If the venue is not present in the list, please click 'Request new venue' and follow the instructions. An email is generated to the relevant person will add the venue to the available venues if appropriate. See *Figure 10: Request new venue*.

Request New Venue

Please enter the name of the new venue, its address and any additional relevant information in the *Message* box below, this request will then be sent to **venue-admin@maxcourse.co.uk**.

Message

Venue name:	<input type="text"/>
Address (including postcode):	<input type="text"/>

Figure 10: Request new venue

Subject: Select the subject for the course. If the subject is not present in the list, please click 'Request new subject' and follow the instructions. An email is generated to the relevant person who will add the subject to the available subjects if appropriate. See *Figure 11: Request new subject*.

Request New Subject

Please enter the name of the new subject and any additional relevant information in the *Message* box below, this request will then be sent to **subject-admin@maxcourse.co.uk**.

Message

Subject name:

Figure 11: Request new subject

Course info 1-4: Are customised for each installation of Maxcourse, they can be used to store a piece of information about the course which may be visible to the general user of the site. Throughout this manual Course info 1 has been customised to store a course style setting and Course info 2 to store catering information.

Booking type: If set to *Administrator manual booking only* the Maxcourse user and operator modes cannot be used to book a person onto the course, only a Manager (or an Administrator after the course has taken place) can book people onto the course using the refSectionmcRegistercourse register. This feature can be used to manage courses whose application must remain more manual, e.g. requires an application form to be filled - the form could be added as a *downloadable document* on page 32.



NOTE

If set to manual booking you should carefully document how a user is to book on the course in the course's details

2.6.5 Text

The course text section contains the course description, aims and objectives; see *Figure 12: Edit course text*.

Edit Course Text: #123

Title*

Description

Aims

Objectives

Figure 12: Edit course text

Title: This mandatory field is the title of the course.

Description: This text field is displayed next to the title in course lists on the standard user site.

Aims: The aims of the course can be set here and formatted with the basic formatting functions available in the CKEditor.

Objectives: The objectives of the course can be set here and formatted with the basic formatting functions available in the CKEditor. Click on the down arrow to expand the toolbar and view the CKEditor options.



NOTE

You can cut/copy and paste Aims and Objectives from other file formats such as Word documents or PDFs.

2.6.6 Date & time

The time and date related options are available in this section. See *Figure 13: Edit course date & time*.



Edit Course Date & Time: #123

Course date: 16 October 2009

Event type: Single day event

Start time: 00:00

End time: 00:00

CPD hours: 0:00

Live date: 16 October 2009

Last cancellation: 4 weeks before the course

Save changes Cancel

Figure 13: Edit course date & time

Course date: This field was set during course creation, edit the date accordingly.

Event type: It is possible to set a multi-day event using this function.

Start time: This is the start time of the course.

End time: This is the end time of the course.

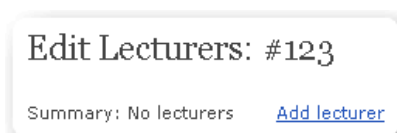
CPD hours: This is the default number of hours that will appear on the certificate.

Live date: Set a day for the course to become live for bookings. This is the date that the course will appear to end users once it has been approved. The live date cannot be changed once the course is live.

Last cancellation: There will be a default last cancellation date for a refund, modify this here. You should only change the default last cancellation under special circumstances.

2.6.7 Lecturers

The lecturers for the course can be assigned in this section, see *Figure 14: Edit lecturers – No lecturers*.



Edit Lecturers: #123

Summary: No lecturers [Add lecturer](#)

Figure 14: Edit lecturers – No lecturers

Clicking 'Add lecturer' will lead to the add lecturer page for the course, see *Figure 15: Add lecturer*.

Add Lecturer: #123 Lecturers of course subject


Name	Email address	Lecture subjects	
Boothroyd, Dr Lynda	lboothroyd@maxcourse.co.uk	Communication skills, Health and safety	Contact
Courtney, Mr Nathan	ncourtney@maxcourse.co.uk	Communication skills, Health and safety, Information technology	Contact

Figure 15: Add lecturer

Filter selection: The filter will toggle between lecturers that are assigned to lecture on the course subject already and a list of all lecturers. If a lecturer is selected that isn't assigned to the course subject a confirmation screen will appear to add the subject to the lecturer.

Contact: Clicking on the contact link to the right of each listed lecturer takes you to the lecturer's contact details page, this page lists any known contact telephone numbers, postal and email addresses.

If there is a not suitable lecturer you can 'Request new lecturer'. An email is generated to the relevant person who will add the lecturer if appropriate and advise you by email.



NOTE

The 'Request new lecturer' button is visible for Organisers and Administrators. Managers have 'Create new lecturer'.

2.6.7.1 Create new lecturer

This is available to Managers of the system. Enter a surname into the text box and click 'Continue' to search for an existing user, see *Figure 16: Create new lecturer*.

Create New Lecturer

Last name*

Enter the last name of the lecturer to search for their user account.

Figure 16: Create new lecturer

Any user with the same surname will be listed, select the user to make them a lecturer. If your search does not find any user then either go back and change your search string or click 'Create new user account', see *Figure 17: Create new lecturer – continued*.

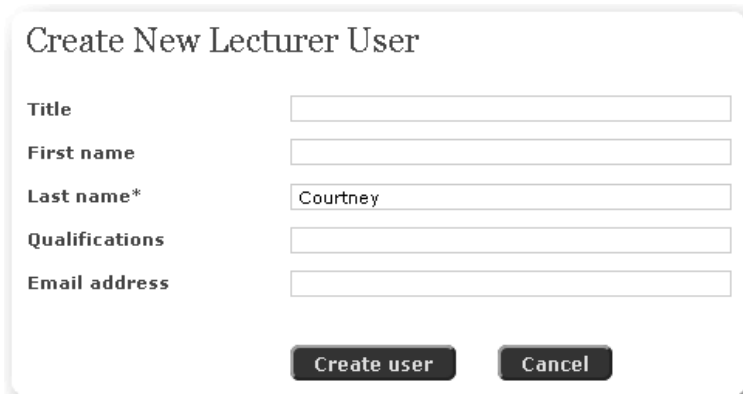
Create New Lecturer - Continued

No users with a last name containing "Courtney"

[Create a new user account](#) for lecturer "Courtney"

Figure 17: Create new lecturer – continued

Clicking on the 'Create a new user account' link opens up a simple page to input the information needed to create a new lecturer user, see [Figure 18: Create new lecturer user](#).



The screenshot shows a form titled "Create New Lecturer User". It contains five input fields: "Title", "First name", "Last name*" (pre-filled with "Courtney"), "Qualifications", and "Email address". At the bottom of the form are two buttons: "Create user" and "Cancel".

Figure 18: Create new lecturer user

Title: Enter the title of the lecturer.

First name: Enter the first name of the lecturer.

Last name: Mandatory field. This field is pre-filled and not editable.

Qualifications: Enter the qualifications of the lecturer.

Email address: Enter the email address of the lecturer.

Click on 'Create user' when you are ready, this will take you to the Edit lecturer page, see [Figure 18: Edit lecturer](#).

Edit Lecturer: Nathan Courtney

Title

First name

Last name*

Qualifications

State

- Active - new courses can be created with this lecturer
- Retired - new courses cannot be created but users can search for courses with this lecturer
- Hidden - cannot create new courses or search for this lecturer

Contact details

Email address

Telephone number

Address line 1

Address line 2

Address line 3

Town/City

County

Postcode

Figure 19: Edit lecturer

You can set the state of the lecturer to active, retired or hidden and enter lecturer specific contact details. When you are ready click 'Save changes'.

After a lecturer has been added the 'Edit Lecturers' screen is as shown in *Figure 20: Edit course lecturers*.

Edit Lecturers: #123

Summary: 1 lecturer [Add lecturer](#)

Name	Fee (£)	Allowance (£)	Expenses (£)	Lecture time (hours:mins)	
Mr Nathan Courtney	0.00	0.00	0.00	0:00	Contact Remove

Figure 20: Edit course lecturers

Clicking on the name of the lecturer takes you to an edit screen that allow you to input the costs associated with the lecturer, see *Figure 21: Edit lecturer costs*.

Figure 21: Edit lecturer costs

2.6.8 Target audience

A specific target audience can be applied to a course, limiting by profession who can book on the course, e.g. Doctor only, Dentist only, etc. The target audience is populated by entries in the professions section of the site. See *Figure 22: Edit target audience – No rules*.

Figure 22: Edit target audience – No rules

NOTE

If your course has no target audience stipulations then leave the 'Target audience' section empty. This means that the course is open to all end users regardless of their profession.

If there are current target audience entries you can remove them by clicking the remove link. Click on 'Create new target audience' to add a profession to the target audience list. See *Figure 23: Create new target audience*.

Figure 23: Create new target audience

Single target audience: If your course requires one profession then select a profession in 'First profession'. Click 'Create'. See *Figure 24: Edit target audience - 1 profession*.

Edit Target Audiences: #123

Summary: 1 target audience rule [Create new target audience](#)

First profession	Second profession	Surcharge (£pp)		
Dentist	None	None	Edit	Remove

Target audience is mandatory [Change](#)

Figure 24: Edit target audience - 1 profession

See [Edit target audience](#) on page 28 below for details on editing the target audience.

Multiple professions with 'OR': If your course requires more than one profession, but the audience can be made up of any of the professions, e.g. <profession 1> OR <profession 2> etc. then select the first profession and click 'Create', repeat the process to add the subsequent professions. See [Figure 25: Edit target audience - 2 professions \(OR\)](#).

Edit Target Audiences: #123

Summary: 2 target audience rules [Create new target audience](#)

First profession	Second profession	Surcharge (£pp)		
Dentist	None	None	Edit	Remove
Doctor	None	None	Edit	Remove

Target audience is mandatory [Change](#)

Figure 25: Edit target audience - 2 professions (OR)

See [Edit target audience](#) on page 28 below for details on editing the target audiences.

Dual professions with 'AND': If your course requires mandatory dual professions e.g. <profession 1> AND <profession 2> then select the first profession, then the second profession. Click 'Create'. See [Figure 26: Edit target audience - 2 professions \(AND\)](#).

Edit Target Audiences: #123

Summary: 1 target audience rule [Create new target audience](#)

First profession	Second profession	Surcharge (£pp)		
Dentist	Nurse	None	Edit	Remove

Target audience is mandatory [Change](#)

Figure 26: Edit target audience - 2 professions (AND)

See [Edit target audience](#) on page 28 below for details on editing the target audience.

NOTE



The 'Edit target audience' page also has an important selector. The default for target audiences are 'Mandatory' so only users with the professions selected can book on courses with the profession set in the target audience. You can click the associated 'Change' link that will allow the target audience to be only recommended and therefore allow other professions to book on the course as well.

2.6.8.1 Edit target audience

Clicking the 'Edit' link alongside the profession rule you have created will take you back to the 'Edit target audience' page that has just been set above. Both professions can be edited, but most importantly a 'Surcharge' can be set. This surcharge will be calculated at the 'Basket' stage of the purchasing process.

NOTE



The surcharge is applied per person in addition to the course charge. If you enter a negative value then this is a discount on the course charge.

A discount cannot be more than the course fee.

2.6.9 Conditions

Course conditions are similar to a target audience in that they can be used to restrict access to a course or define discounts/surcharges. You can choose the duration that the condition is available for. If your course does not have such requirements or is best implemented using target audiences then leave this section empty.

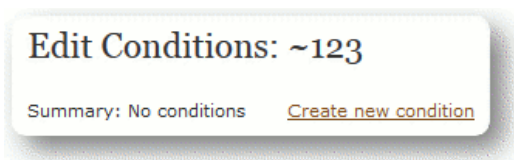


Figure 27: Edit conditions

NOTE



Unlike Target audiences, conditions cannot be strictly enforced when based on a user group info. This is because conditions can rely on *user infos* on page 92 which can be freely edited by a user whereas target audiences use professions which can be configured to require manual approval for each profession application.

Click on 'Create new condition' to create a new condition for the course, see *Figure 28: Create new condition*.

Figure 28: Create new condition

Condition type: Select the type of condition to add, 'only available for' and 'not available for' add restriction on who can book on the course, 'surcharge - fixed amount/percentage' and 'discount - fixed amount/percentage' can be used to alter the charge. A discount cannot be more than the course fee.

User field: Select either 'all users' to apply the condition to everyone or the user info field the condition is to apply to, user info fields are system dependent, see [User info 1 - 4](#) on page 92 for more information.

Duration: Select the time period the condition is available for.



NOTE

Once a condition becomes live, the duration can only be changed to 'always' or 'till now'.

Once these have been set, click on the 'Continue' button to define where appropriate, the user field value and the discount/surcharge fixed amount or percentage, see [Figure 29: Create new condition - continued](#).

Figure 29: Create new condition - continued

2.6.9.1 Edit condition

Description	Duration		
10% discount for people whose main occupation is dentist	2 weeks from the live date	Edit	Remove
£10.00 discount for people whose main occupation is administrator	6 weeks from the live date	Edit	Remove

Figure 30: Edit Conditions

Clicking the 'Edit' link alongside the condition rule you have created will take you to the 'Edit Condition' page that is similar to the page in *Figure 29*: . The condition type and user field cannot be altered, if these need to be changed you must remove the condition and create a new one. After conditions become live, they cannot be removed but they can be terminated immediately.



NOTE

The order of conditions on the 'Edit Conditions' page determines the order in which the conditions are applied. Conditions that will expire first will appear at the top of the list, with the exception of a condition that has the duration set to 'always'.

Editing conditions after the live date

Once conditions become active, they can only be edited by a Manager when the course is in a Live EDIT state. Conditions cannot be removed.

Description	Duration	State		
10% discount for people whose main occupation is dentist	2 weeks from the live date	Active	Edit	Remove
£10.00 discount for people whose main occupation is administrator	6 weeks from the live date	Active	Edit	Remove

Figure 31: Edit Conditions after the live date has passed

Clicking the 'Edit' link alongside the condition rule will take you to the 'Edit Condition' page where the field value, duration and discount/surcharge can be changed. The duration can be changed either to 'always' to keep the condition in an active state until the course start date or 'till now' to terminate the condition immediately. Selecting 'till now' puts the condition in a 'terminated' state. The state of a condition is shown on the 'Edit Conditions' and 'View Conditions' page.

Edit Condition

Condition type: Discount - percentage

User field: Main occupation

Field value*: Dentist

Duration: 2 weeks from the live date


Discount (%)*: 2 weeks from the live date

The discount is a per person reduction to the course charge.

Save changes Cancel

Figure 32: Edit Condition

NOTE



The discount/surcharge - fixed amount/percentage should not be changed after the live date. If it does need to be altered, terminate the condition and create a new condition.

2.6.10 Costing

Clicking the 'Edit' link in the 'Costing' section opens the page that allows you to enter course costing information for budgeting purposes. See *Figure 33: Edit course costing*.

Edit Course Costing: #123

Charge per person (£): 0.00

Minimum attendance: 0

Maximum attendance: 0

Course budgeting

Lecturer costs (£): 0.00

Venue costs (£): 0.00

Material costs (£): 0.00

Equipment costs (£): 0.00

Refreshment costs (£): 0.00

Other costs (£): 0.00

Additional notes

Save changes Cancel

Figure 33: Edit course costing

Charge per person: Enter the charge per person.



NOTE

For systems with the VAT option enabled this charge is the gross amount, i.e. inclusive of VAT.

Minimum attendance: Enter the minimum attendance that the course can run with. If the course does not reach the minimum required attendance an issue will be raised with the Organiser, Administrators and Managers so they can take remedial action.

Maximum attendance: enter the maximum attendance.

Lecturer costs: These costs are entered in the lecturers section available on the course manage page. See *Manage course* on page 17.

Venue costs: Enter costs associated with the venue.

Material costs: Enter costs associated with course materials.

Equipment costs: Enter costs associated with equipment.

Refreshment costs: Enter costs associated with refreshments.

Other costs: Enter any other costs.

Additional notes: enter any additional notes in this section.

2.6.11 Documents

Relevant documents can be added to the course and the accessibility options set, see *Figure 34: Edit document*.

Edit Document: #123

Name*	<input type="text" value="Programme"/>
Access restrictions	<input type="text" value="Not accessible"/>
Available from	<input type="text" value="Live date"/>

Figure 34: Edit document

Name: This field is mandatory, set the name of the document here.

Access restrictions: The document may have restricted access and can be set accordingly; not accessible, attendees only, booked only, accessible to all.

Available from: The document may also be available from the day the course becomes live, from the date the course is run, or once the course evaluation has been completed.

The main edit documents page manages the current documents, see *Figure 35: Edit documents*.

Edit Documents: #123

Summary: 2 documents [Add document](#)

Name	Access restrictions	Available from		
Handout 1	Attendees only	Course date	View	Remove
Programme	Booked only	Live date	View	Remove

The course offers an attendance certificate [Change](#)

Figure 35: Edit documents

In the example above the programme is available to people booked on the course from the course live date. Handout 1 is available to attendees of the course only from the course date.

The 'Change' link at the bottom of the page is used to configure whether a certificate is available for the course.

2.6.12 Evaluation questions

Evaluation questions can be created and edited in this section, the standard evaluation questions are automatically added to the course when it is created. After the evaluation questions have been answered there is an option on the main 'Manage course' page to export the answers. Clicking the 'Edit' link will open the 'Edit evaluation questions', see *Figure 36: Edit evaluation questions*.

Edit Evaluation Questions: #124

Number of questions 2 [Add question](#)

✘ The text within the '**' update markers needs to be replaced and the markers removed.

Q1 text
 Q1 type with
[Move up](#) [Move down](#) [Remove](#)

Q2 text
 Q2 type with
[Move up](#) [Move down](#) [Remove](#)

Additional comments
 Comments label

Evaluation must be completed and submitted before attendance certificate is unlocked for download

[Save changes](#) [Reset to default](#) [Cancel](#)

Figure 36: Edit evaluation questions

Number of questions: Details the number of questions that make up the evaluation. Click 'Add question' to add a further question.

Question text: This is the question text.

Question type: The type of answer required and the number of options can be set:

- Yes/no
- True/false
- Agree/disagree
- Strongly agree/disagree
- Excellent/poor
- Achieved/not achieved
- Easy/difficult
- Assess venue: This is a specific question type that can be used for all venue related questions, enabling the system to generate a venue report

Move up: If this button is enabled then use it to order the questions. The associated question will be moved up in the evaluations list.

Move Down: If this button is enabled then use it to order the questions. The associated question will be moved down in the evaluations list.

Remove: Use this button to remove the question completely.

Additional comments: Set this to 'Optional' or 'Mandatory' to include a textbox for further comments at the bottom of the evaluation form; an error is returned to the user if this is set to mandatory and they do not supply a comment.

Comments label: Optional text displayed above the Addition comments textbox which can be used to outline information required.

Force evaluations: Check this box to force the evaluation questions to be answered for the certificate to be made available.

Save changes: Click 'Save changes' when you have finished the editing.

Reset to default: If there are any standard evaluation questions that have been modified click this button to restore them to the default values. Any questions added will be removed as well.



WARNING

Clicking the 'Reset to default' button will remove any questions that have been added.

2.6.13 Register

The register is available from the main 'Manage course' page; click the 'booked' link to go to a register of people who are booked on the course. Click the 'view all' to view users that are booked on the course and that are on the waiting list; see *Figure 37: View register*. The attendance register is also available from this section, clicking this link will generate a PDF document for the sign in and sign out sheets.

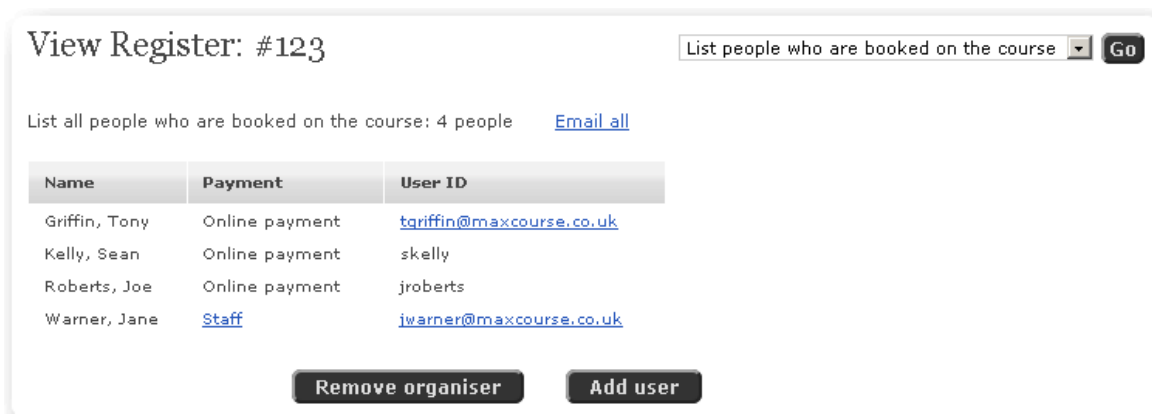


Figure 37: View register

Before the course has taken place the following filters can be selected from the 'View register' page:

- List all
- List people who are booked on the course
- List people on the waiting list

Add organiser or **Remove organiser**: Clicking this button will either book the organiser onto the course, allowing the organiser to obtain a certificate of attendance, or remove them if already booked on the course. If the organiser has been booked onto the course they will take one of the course places (i.e. their place is counted towards the maximum attendance limit); they will then have to sign the attendance register to validate their attendance and possibly fill out the evaluation questions after the course if they have been set.

Add user: This button can be used to add other members of staff as well as standard users, creating either a pre-paid or unpaid booking transaction. This feature is not available to Organisers; it is only available to Administrators once the course has taken place and to Managers at any time.

Once the course has taken place the following filters can be selected from the 'View register' page:

- List all
- List people who are booked on the course
- List people who have unknown attendance
- List people who were absent
- List people who attended the course
- List people on the waiting list

If the 'List people who have unknown attendance' filter is selected the View register page can be used to mark course attendance, see *Figure 38: View register, setting attendance*.

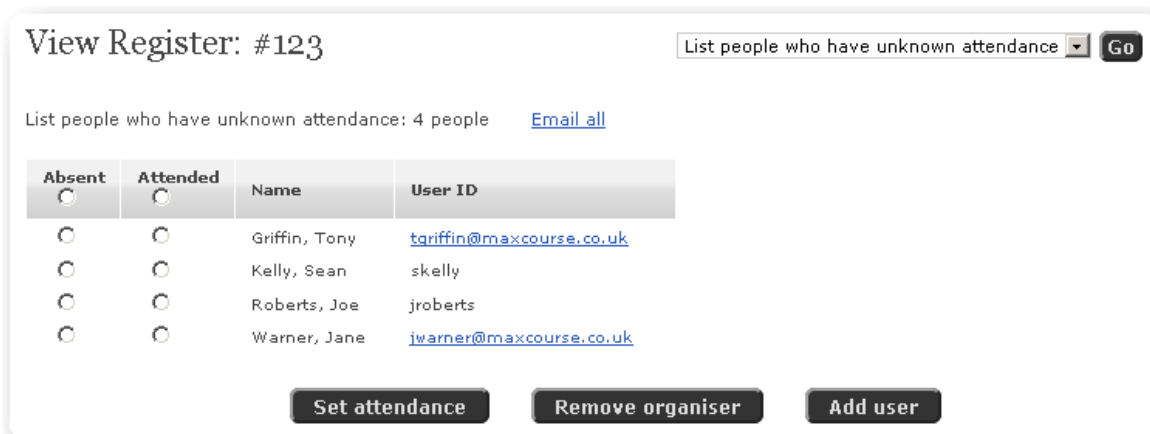


Figure 38: View register, setting attendance

Set attendance: Click this button once you have checked either *Absent* or *Attended* for each person whose attendance is known. Once set, a person's attendance state can be removed by changing the View register filter to list just absent or attended, see *Figure 38: View register, removing attendance*.

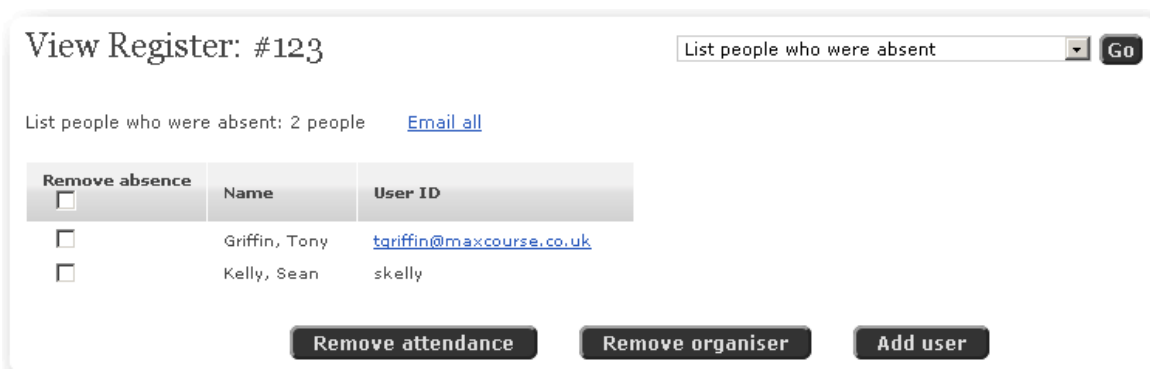


Figure 39: View register, removing attendance

2.6.13.1 Changing an attendee's CPD

If a person attended only part of the course the amount of CPD can be adjusted appropriately. First mark the person as attended and then change the View register filter to list attended, see *Figure 40: View register, changing CPD*.

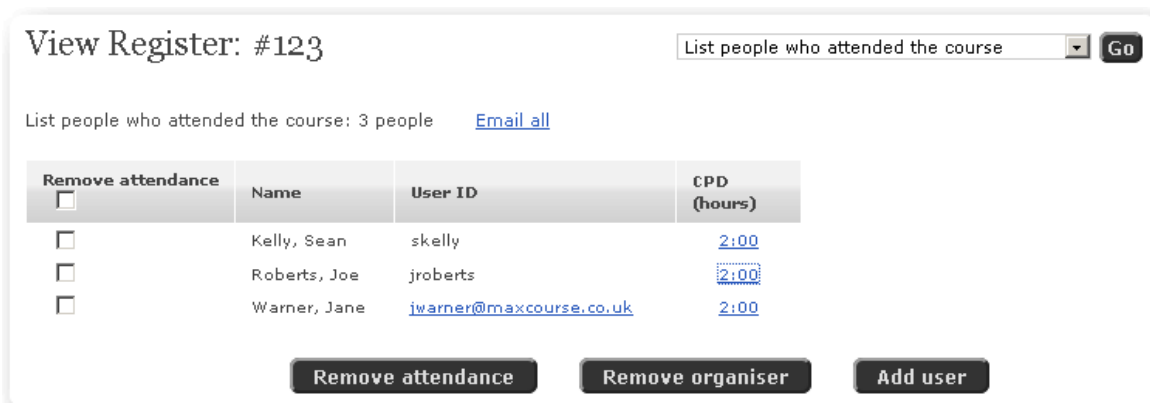


Figure 40: View register, changing CPD

Next, clicking on the user's current CPD value and on the 'Edit Attendee CDP' page correct their CPD

and click on 'Save changes' when done. The amount of CPD shown in the register and in their course certificate will now be the corrected value.

2.7 Lecturers



Click on the Lecturers link to get a full list of active lecturers which meet the current filter criteria, see *Figure 41: Lecturers list*.

Name	Email address	Lecture subjects	
Boothroyd, Dr Lynda	lboothroyd@maxcourse.co.uk	Communication skills, Health and safety	Contact
Courtney, Mr Nathan	ncourtney@maxcourse.co.uk	Communication skills, Health and safety, Information technology	Contact

Figure 41: Lecturers list

The filter can be used to reduce the list to just lecturer of a selected subject. Click on the 'Contact' link so access further details of the lecturer.

2.8 Venues



Click on the Venues link to get a full list of active venues which meet the current filter criteria, see *Figure 42: Venue list*.

Name	Region	Location
Treliske Hospital	Cornwall	
Gipsy Hill Hotel	Devon	
Prince of Wales Hotel	Gloucestershire	
Mount Somerset Hotel	Somerset	

Figure 42: Venue list

The filter can be used to reduce the list to just venues in a selected region. Click on the venues name to view further or on the map icon in the Location column to view a map of its location (if available for the venue).

3 Operator

3.1 Restart



The Operator mode is used for all user related functions. An Operator uses this mode to search for a user and book them on a course or provide assistance over the telephone. The Restart button must be used to clear the current selected user before taking another call.

3.2 Cheque payment



This section allows the operator to process cheque payments that have come in, this option may not be available on your system. Click this link to enter your search criteria (e.g. the cheque reference number, user ID or the user's name) to find the cheque, see *Figure 43: Cheque search*.

Cheque Search

Region

Search string

To search for a cheque enter its reference number (e.g. 'MXNTY1234' or just '1234'), to search for a person's cheques enter their user ID or name.

Figure 43: Cheque search

NOTE



In the example above the programme is available to people booked on the course from the course live date. Handout 1 is available to attendees of the course only from the course date.

Enter the search criteria for your search and click 'Search'. The page that displays is the 'Cheque Match List' and will show all the cheques matching the search criteria. See *Figure 44: Cheque match list*.

Cheque Match List

Summary: 4 cheques found

Name	User ID	Ref	Date	Cheque amount (£)
Griffin, Tony	tgriffin@maxcourse.co.uk	7	23 Aug 09	60.00
Roberts, Joe	jroberts	12	23 Sep 09	100.00
Kelly, Sean	skelly	13	14 Oct 09	60.00
Warner, Jane	jwarner@maxcourse.co.uk	14	15 Oct 09	60.00

Figure 44: Cheque match list

This page displays the results of the search, if there are any results the users' name, user ID, Cheque reference, Date and Cheque amount are displayed. Click on '**Ref**' link to proceed to acknowledge receipt of or cancel the cheque payment. you are then taken to the transaction page, see *Figure 45: Cheque payment, view transaction*, showing all events associated with the payment, you should check for booking

cancellations as these often explain any discrepancy between the requested amount and the actual cheque amount. Click on the 'Unconfirmed cheque payment' link to confirm or cancel the payment.

View Transaction: Reference 7

Related course bookings

Date	Title	Number of people	Booking cost (£)
Mon 24 Aug 2009	Cross infection control (MCD-112)	1	60.00

Related transactions

Date	Description	Booking charge (£)	Payment (£)	To/From Account (£)	Transaction Balance (£)
23 Aug 09	Booking for 1 course place (Ref: 7) Unconfirmed cheque payment of £60.00	60.00			60.00
Total		60.00	0.00	0.00	

Figure 45: Cheque payment, view transaction

3.2.1 Confirm cheque payment

You are now presented with a page specific to a user cheque payment, see *Figure 46: Confirm cheque payment*.

Confirm Cheque Payment: Reference 7

User name [Tony Griffin](#)

User ID tgriffin@maxcourse.co.uk

Booking date 23 August 2009

Maxcourse reference MXNTY7

Requested amount £60.00 (GBP)

Cheque amount (£)

Cheque details

Comments

Figure 46: Confirm cheque payment

You can see the following information on this page: User ID, Booking Date, Maxcourse reference and Requested amount.

User name: Click on this link to move away from cheque payment and go to the Operator home page specific to the user (Administrators and Managers only).

Cheque amount: Enter the cheque number or any other important information about the cheque payment itself. This is a mandatory field when confirming a payment.

Cheque details: Enter the cheque number or any other important information about the cheque payment itself. This field may be customised for each installation of Maxcourse and is usually mandatory when confirming a payment.

Comments: Used for any other comments associated with the cheque payment.


Click 'Confirm payment' button to confirm the payment, confirmation is immediate and you are taken to the confirmed cheque payment page, see *Figure 48: Confirmed cheque payment*. Alternatively you can click on 'Cancel payment' to cancel the payment and any related bookings.

3.2.1.1 Cancel payment

Click on the 'Cancel payment' to cancel a cheque payment, this will taken you to the cancel payment confirmation page, see *Figure 47: Cancel cheque payment*.

Cancel Cheque Payment: Reference 7

Click the *Confirm* button below to cancel the cheque payment.

 There are no refundable course bookings; the 1 non-refundable course booking will not be cancelled. Payment for the non-refundable course place will be debited from the user's account.

User name [Tony Griffin](#)

User ID tgriffin@maxcourse.co.uk

Comments

Confirm

Figure 47: Cancel cheque payment

NOTE




When a cheque is cancelled all refundable course bookings pertaining to that transaction are also cancelled, this action is irreversible as another user may take the course place.

All free and non-refundable course places are not cancelled, these must be cancelled manually if they are no longer required. Any money still owed for a non-refundable booking will be immediately debited from the user's account.

3.2.1.2 Handling a bounced cheque

If a cheque is returned by the bank the cheque payment state can be returned to unconfirmed and can then, if necessary, be cancelled. Use the Cheque search page in the same way to get to the Confirmed cheque payment page, see *Figure 48: Confirmed cheque payment*. Note that searching by the user's name or ID only lists unconfirmed or recently confirmed cheques, if the cheque is not in the match list use only the cheque reference as the search criteria. Alternatively the user's Account history interface may be used.

Confirmed Cheque Payment: Reference 7

 This cheque payment has been confirmed.

User name	Tony Griffin
User ID	tgriffin@maxcourse.co.uk
Maxcourse reference	MXNTY7
Booking date	23 August 2009
Request amount	£60.00 (GBP)
Cheque amount	£60.00 (GBP)
Cheque details	Account: Mr Griffin, No: 123456789
Cheque confirmed	By Sam Clayton (sclayton@maxcourse.co.uk) on 9 September 2009
Not cleared comments	<input type="text"/>

Cheque not cleared

Figure 48: Confirmed cheque payment


On this page you are also able to use the 'Cheque not cleared' button used if a cheque is not cleared for any reason. This puts the transaction back into the unconfirmed payment state so a future cheque can be processed or the payment and bookings can be cancelled.

3.3 Search courses




This section enables the user to search for courses using the three standard methods, see [Figure 49: Search courses - Operator](#).

Search Courses



Course calendar



Course list
Printable list

Search string

Search

Figure 49: Search courses - Operator

Course calendar: Click this link to view courses through the calendar view. For further information on the course calendar see [Course calendar](#) on page 14.

Course list: Click this link to view courses through the calendar view. For further information on the course list see [Course list](#) on page 15.

Search string: Enter the search criteria (e.g. keywords) and click 'Search'. The results will be displayed on the 'Course match list'. For further information on searching for courses using text searching see [Search courses](#) on page 12.

3.4 Basket



After a course has been searched and selected it can be 'Added to the basket' by clicking on the link in the 'Course details' page.

The main Operator page contains the link to the 'Basket' page. This link also contains information on the current state of the basket. See *Figure 50: Empty basket* and *Figure 51: Basket containing a course*.

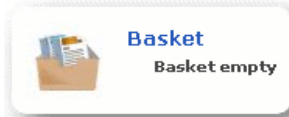


Figure 50: Empty basket



Figure 51: Basket containing a course

Clicking on the basket link directs the user to the Basket detail page. See *Figure 52: View basket, no course or user* and *Figure 53: View basket, one course no user*.



Figure 52: View basket, no course or user



Figure 53: View basket, one course no user

Current user: The name of the user is displayed here, however if there is no current user then 'No current user' is displayed and the link 'User must be set to continue' is active.

Course title: This active link will go straight to the 'Course detail page'.

Edit: If there is no current user this is a dead link, however with a loaded user this leads to the 'Edit course booking page'.

Remove: To remove the course from the basket, click this link.

User must be set to continue: If there is no current user, this link directs the user to the main operator page to help facilitate searching for a user.

With a current user the 'Basket' has extended functionality, see *Figure 54: View basket with user and course*.

View Basket: 1 course

User name Sean Kelly

Date	Title	Cost (£pp)	Number of people	Total Cost (£)	
Fri 23 Oct 2009	Management and leadership	20.00	1	20.00	Edit Remove

Subtotal £20.00
 Account credit £0.00
 Total to pay £20.00

[Checkout](#)

Figure 54: View basket with user and course

The added functionality can be seen in the active 'Edit' and 'Checkout' links.

Edit: The 'Edit' link shows the booking detail, see *Figure 55: Edit course booking*.

Edit Course Booking

You currently have 1 person booked on **Management and leadership** which takes place on Friday 23 October 2009.

Name	User ID	Professions
Kelly, Sean	skelly	Manager

i To add other people to this booking you need to [add them as contacts](#) first.

Figure 55: Edit course booking

Checkout: The checkout link directs the user to the 'Confirmation' page, see *Figure 56: Checkout*.

Checkout: 1 course

User name Sean Kelly

You are about to book 1 person onto 1 course with a total cost of £20.00 (GBP). The outstanding balance to pay is £20.00, to authorise payment and complete the booking click on a payment method button below.

i Please ensure you inform the caller of how to access the terms and conditions (they can be found at <http://mxlocal/maxcourse/maxinity/terms>) and that by continuing with this booking they are agreeing to the terms and conditions. You must also inform them of the course last cancellation dates, they will not be eligible for any refund if they cancel a booking after these dates:

Date	Course title	Last cancellation date
Fri 23 Oct 2009	Management and leadership	Fri 25 Sep 2009

w Please note that to secure this booking, online payment must be received within **30 minutes**, cheque payment within **7 days**.

I have informed the caller of the terms & conditions and last cancellation dates.

[Online payment](#) [Cheque payment](#) [Defer payment](#)

You are not authorised as an operator to make an online payment - please contact your Maxcourse system manager.

Figure 56: Checkout

This page gives you a lot of important pieces of information:

Current user: This informs the user the name of the person being booked on the course.

Cost of course and amount payable: This informs you about the number of people booking on the course, the total cost and the amount outstanding after any credit the user has in the system has been taken into account.

Cancellation detail: By law the person who is booking on a course must have a cooling off period. The specific time frame is set during installation of the site. This page warns the user to tell the person who is being booked on the course if this time period has passed, or if it is close to being passed.

Terms & conditions: By processing a payment the user is making a contract with the course provider. All users must be given the opportunity to view them and they are available online. You must check the box to verify the user has been given this opportunity.

Reservation: The booking is reserved for different timeframes depending on the payment method that is chosen. For an online transaction the payment must be received within 30 minutes and for a cheque payment, it must be received within 7 days.

There are now up to three options available depending on your system installation:

Online payment: Click to take payment online.

Cheque payment: Click to use the cheque payment process.

Defer payment: Click to defer payment.

NOTE



For PCI compliance both the Operator themselves and the computer being used must be approved before 'Online payment' option is made available. If you find this payment method disabled please consult your Maxcourse system manager.

3.4.1 Online payment

Clicking this option takes you to the online payment system and can result in either payment success or payment failure.

3.4.1.1 Payment failure

If the payment has not been successful the user is directed to the 'Online Payment Not Received' page asking what to do next, see [Figure 57: Online payment not received](#).

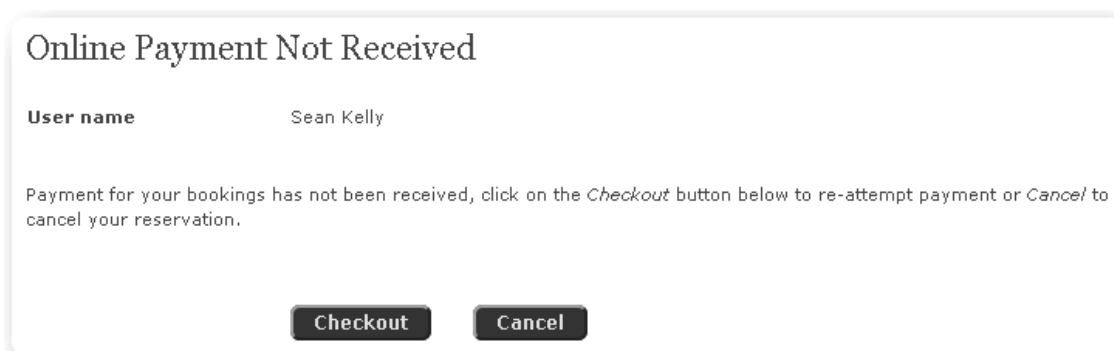


Figure 57: Online payment not received

Clicking 'Checkout' takes the user back to the checkout page, clicking on 'cancel' opens up the basket page to allow the user to remove the course from the basket.

3.4.1.2 Payment success

If the payment has been successful the user is directed to the 'Online Payment Confirmation' page giving details of the payment and options of what to do next, see *Figure 58: Online payment confirmation - Success*.

Online Payment Confirmation

User name Sean Kelly

Your payment of £20.00 has been authorised and your bookings have been confirmed. Please go to [Course management](#) to download available course documents and setup car sharing.


[Continue](#)

Booking Payment Confirmation

[Email confirmation](#) [Printable version](#)

Date 17 September 2009
User name Sean Kelly
User ID skelly
Maxcourse reference MXNTY9
NetBanx reference 090917233252_9XXXX
Cardholder Sean Kelly

Booking total £20.00 (GBP)
Online payment £20.00 (GBP)
Online payee Maxinity Software

 Please note **Maxinity Software** will appear on your bank or credit card statement.

Course date	Title	Number of places	Booking cost (£)	Last cancellation date
Fri 23 Oct 2009	Management and leadership	1	20.00	Fri 25 Sep 2009
	Total	1	20.00	

The terms and conditions of using this site can be found at <http://mxlocal/maxcourse/maxinity/terms>.

Figure 58: Online payment confirmation - Success

3.4.2 Cheque payment

Clicking this option enables the user to pay for the bookings by cheque; the system immediately reserves the course places and goes to the Cheque payment details page, see *Figure 59: Cheque payment confirmation*. This page details what information is required by the user to write and send the cheque.

Cheque Payment Confirmation

User name Sean Kelly

You need to write a cheque for £20.00 payable to the **Cheque payee** and send it to the **Cheque address**, see details below.

⚠ You must write the **Maxcourse reference** and your **User ID** on the back of the cheque.

The cheque must be received within 7 days to confirm the booking. Please go to [Course management](#) to download available course documents and setup car sharing.

[Continue](#)

Unconfirmed Cheque Payment Booking Details

[Email confirmation](#) [Printable version](#)

Date 17 September 2009

User name Sean Kelly

User ID skelly

Maxcourse reference MXNTY13

Booking total £20.00 (GBP)

Cheque amount £20.00 (GBP)

Cheque payee Maxinity Software Ltd

Cheque address Maxcourse Administrator
Unit 4G, Winford Business Park
Littleton Mills
Winford
Bristol
BS40 8HJ

ℹ Please remember to write the **Maxcourse reference** and your **User ID** on the back of the cheque.

Course date	Title	Number of places	Booking cost (£)	Last cancellation date
Fri 23 Oct 2009	Management and leadership	1	20.00	Fri 25 Sep 2009
	Total	1	20.00	

The terms and conditions of using this site can be found at <http://mxlocal/maxcourse/maxinity/terms>.

Figure 59: Cheque payment confirmation

3.4.3 Defer payment

Clicking this option enables the user to be booked on the course without going through the payment process at this point in time. The system immediately reserves the course places and debits the user's account by the booking amount; this debit can be paid later using *Pay outstanding balance* on page 57.

3.5 Create user



To book on a course the user has to be registered. An Operator creates a user by clicking the 'Create user' link from the main operator page, see [Figure 60: Create new user](#).

Create New User

First name

Last name*

Password*
Case sensitive, minimum of 6 characters & maximum of 16

Date of birth*

Telephone number

Address line 1*

Address line 2

Address line 3

Town/City*

County

Postcode*

Address type*

Figure 60: Create new user

First name: Enter the user's first name.

Last name: Mandatory field. Enter the user's last name.

Password: Mandatory field. Enter a password following the specified criteria.

Date of birth: Mandatory field. Input the user's date of birth.

Telephone number: Enter the user's telephone number.

Address line 1: Mandatory field. Enter the user's first line of the address.

Address line 2: Enter the user's second line of the address.

Address line 3: Enter the user's third line of the address.

Town/City: Mandatory field. Enter the user's town/city.

County: Enter the user's county.

Postcode: Mandatory field. Enter the user's postcode.

Address type: Select an address type. The options are home, work or other.

Clicking 'Create account' will create a new user record then go directly to the 'User details' page, see [Edit user](#) on page 59. Clicking the 'Operator home' link in the breadcrumb trail will allow other tasks to be completed.

3.6 Search users



To search for a particular user click the 'Search users' icon and enter the search criteria. See [Figure 61: Search users](#).

The 'Search Users' dialog box contains a title bar 'Search Users'. Below the title bar, there are two labels: 'Access rights' and 'Search string'. The 'Access rights' label is next to a dropdown menu currently showing 'All access rights'. The 'Search string' label is next to an empty text input field. At the bottom of the dialog box, there are two buttons: 'Search' and 'Cancel'.

Figure 61: Search users

Searching using the user ID of a previously created user 'skelly' the system finds 'Sean Kelly', see [Figure 62: Match list](#).

The 'User Match List' table has a title 'User Match List' and a summary line: 'Summary: 1 user found matching search string "kelly"'. The table has three columns: 'Name', 'User ID Address', and 'Access rights'. The first row contains the following data: 'Kelly, Sean' (with a blue link), 'skelly' and '47 Hill Grove, BS9 4RG' (under 'User ID Address'), and 'Standard user' (under 'Access rights').

Name	User ID Address	Access rights
Kelly, Sean	skelly 47 Hill Grove, BS9 4RG	Standard user

Figure 62: Match list

Clicking on the name link in the list opens up the 'User details' page, see [Edit user](#) on page 59. Maxcourse takes security seriously and protects an individual user's privacy, to this end the first page after clicking the name link above is a security screen, see [Figure 63: User security confirmation - Partial password](#).

The 'User Security Confirmation - Partial Password' screen displays the following information: 'User ID' is 'skelly' and 'Full name' is 'Sean Kelly'. Below this, a message states: 'To proceed the user must supply the **first, third** and **next to last** characters of their password. Please note, passwords are case sensitive.' There is a warning icon (a triangle with an exclamation mark) and the text 'Do not ask for their full password.' Below this is a 'Partial password' label and an empty text input field. At the bottom, there are two buttons: 'Continue' and 'Bypass'.

Figure 63: User security confirmation - Partial password



WARNING

Do not ever ask for a user's full password.

You are directed to enter a partial password in the text box and press continue.

NOTE



Only Administrators and Managers have the required access rights to 'Bypass' the partial password security, Administrators and Managers are trusted users of the system and can opt to use a different form of user authentication - see below. If the user has forgotten their password an Operator cannot help resolve the problem.

If the partial password security has been successfully passed the 'Operator home' page is displayed with the searched for user set as the current user. See [Figure 65: Operator home](#).

If the 'Bypass' button was selected (perhaps because a user could not remember their password), then a second security page is displayed, see [Figure 64: User security confirmation - Personal details](#).

User Security Confirmation - Personal Details

Full name Sean Kelly

Date of birth 1 January 1970

Correspondence address 47 Hill Grove, BS9 4RG

User ID skelly

Confirm

Figure 64: User security confirmation - Personal details

This page is designed to confirm the identity of the selected user and the intended user. After confirming two pieces of personal information click the 'Confirm' button.

After clicking the 'Confirm' button the 'Operator home' page is displayed with the confirmed user set as the current user, see [Figure 65: Operator home](#).

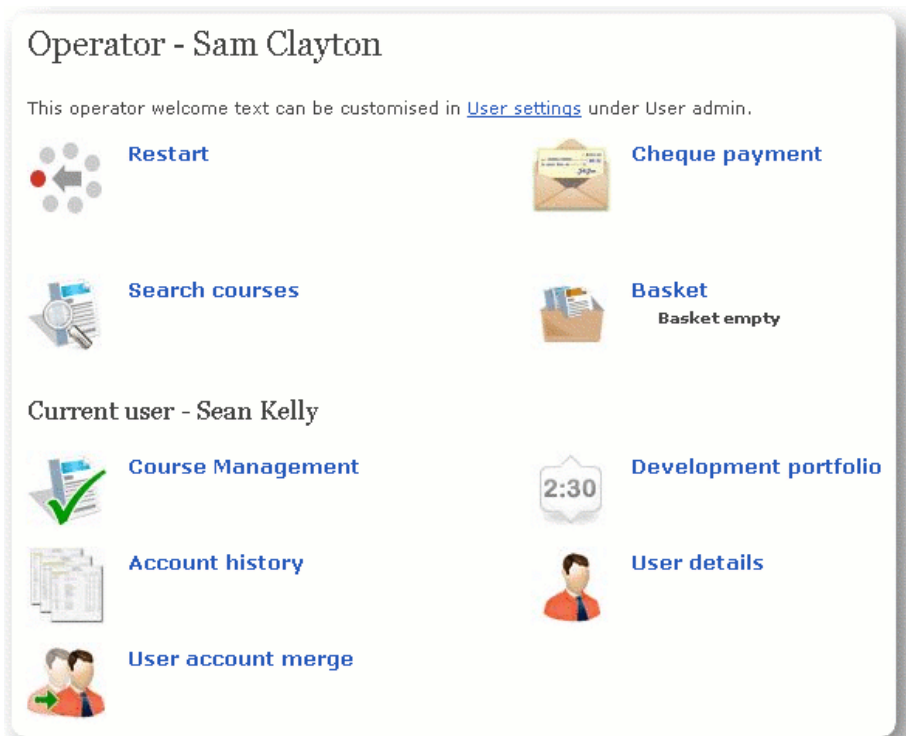


Figure 65: Operator home

3.7 Course management


 This section manages everything to do with the courses of the current user, see *Figure 66: Course management*.



Figure 66: Course management

3.7.1 Page filter

To help get the course information you need quickly this page contains a filter to help you narrow down your search and find exactly what you are looking for.

Filter 1: Course booking status

- All courses (displays all courses)
- Cancelled (displays the courses that have been cancelled)
- On waiting list (displays the courses that the user is on a waiting list for)
- Currently booking (displays the courses that are being currently booked)
- Booked (displays the courses the user is booked to go on)
- Absent (displays the courses that the user failed to attend)
- Attended (displays the courses the user attended)

- Unanswered evaluation (displays the courses that have unanswered evaluation questions)
- With certificate (displays the courses that have certificates)

3.7.2 Course

Each course can be viewed by clicking on the title of the course on the 'Course management' page. This page is similar to the 'Course details' page that was viewed during the 'Add to basket' process before booking the course. There are some additions to the page, see *Figure 67: Booked course details*.

The screenshot shows a course page titled 'Management and leadership'. It includes the following information:

- State:** Booked on course, with a [View booking](#) link.
- Links:** A car icon and the text 'Car share'.
- Documents:** Two document icons. The first is labeled 'Handout 1' with a [Need help](#) link and the text 'viewing PDF documents?'. The second is labeled 'Programme'.
- Subject:** Communication skills.
- Description:** Explore value based leadership to overcome stress and adversity, producing an efficient, intelligent team.

Figure 67: Booked course details

3.7.2.1 View Booking

The 'View booking' link will go to the booking management page, see *Figure 68: View booking*.

The screenshot shows a 'View Booking' page. It contains the following information:

The last cancellation date of course **Management and leadership** is 25 September 2009. Sean Kelly made this booking on 14 September 2009, see transaction [Ref: 4](#).

Name	Email address	Cost (£)	State
Kelly, Sean	skelly	20.00	Booked on course

Total cost of this booking was £20.00. [Cancel booking](#)

Figure 68: View booking

Transaction reference: Clicking on the transaction reference number will lead you to the view transaction detail page, see *Figure 69: View transaction*.

View Transaction: Reference 4

Related course bookings

Date	Title	Number of people	Booking cost (£)
Fri 23 Oct 2009	Management and leadership	1	20.00

Related transactions

Date	Description	Booking charge (£)	Payment (£)	To/From Account (£)	Transaction Balance (£)
14 Sep 09	Booking for 1 course place (Ref: 4) 	20.00			20.00
	Confirmed online payment NetBanx reference: 090914103402_4XXXX Cardholder: Sean Kelly		-20.00		0.00
	Total	20.00	-20.00	0.00	

Figure 69: View transaction

This page has all the detail relating the transaction the course was booked in. The first section describes all the related courses for the booking and the second section describes the transaction detail.

Cancel booking: This link starts the cancellation process for the course booking, see [Figure 70: Cancel whole booking - outside cancellation period](#).

Cancel Whole Booking

You have 1 place booked on **Management and leadership** with a cost of £20.00. The last cancellation date is 25 September 2009.

Click the *Confirm* button below to cancel your booking, the booking cost of £20.00 will be credited to your account.


Confirm

Figure 70: Cancel whole booking - outside cancellation period

If the booking falls within the latest cancellation period a warning is displayed informing you that the user will not be entitled to a financial refund, see [Figure 71: Cancel whole booking - in cancellation period](#).

Cancel Whole Booking

You have 1 place booked on **Management and leadership** with a cost of £20.00. The last cancellation date was 25 September 2009.

 You can cancel your places on the course but you will not be entitled to a refund as the last cancellation date has already passed. Click the *Confirm* button below to cancel the booking.

Confirm

Figure 71: Cancel whole booking - in cancellation period

3.7.2.2 Links

There are two links that can appear on the booking page *shown above*, the *Car sharing* link and *Certificate* link which is only available when a certificate can be viewed and printed.

Car sharing

When a user has been booked on the course the car sharing link becomes active, this is an opt-in service for users; see *Figure 72: Course car share*.


Course Car Share

You are currently reviewing the car share scheme for **Management and leadership** on Fri 23 Oct 2009 at [Mount Somerset Hotel, Tauton](#).

You have not currently opted in to the course's car sharing scheme. [Setup](#)

Figure 72: Course car share

Clicking the name of the venue will direct the user to information about the venue, there is also information about the car sharing status.



NOTE

Maxcourse takes the security of personal information seriously. To protect personal data when a user opts-in to car sharing only the user's name and the first part of the postcode is used.

Clicking 'Setup' will allow you to setup car sharing, see *Figure 73: Car share setup*.

Car Share Setup

Select to either not opt-in to the car sharing scheme or select an address from which you want your car share to start. [Click here](#) to add another address.

Do not opt-in to the car sharing scheme.

Opt-in to car sharing scheme using partial postcode **BS9**.



 If you opt-in to the course's car sharing scheme your name and first part of your selected address' postcode will be visible to other people who have requested a car share for the course.

Figure 73: Car share setup



NOTE

If you opt-in to the course's car sharing scheme your name and the first part of the postcode of your selected address will be visible to other people who have requested a car share for the course.

Click 'Save changes' when you are ready. If you have opted-in to car sharing the red car on the course details page changes to green and the 'Course car share' page will have been updated. See *Figure 74: Course car share - continued*.

Course Car Share

You are current reviewing the car share scheme for **Management and leadership** on Fri 23 Oct 2009 at [Mount Somerset Hotel, Tauton](#).

You have opted in to the course's car sharing scheme using address **BS9**. [Change](#)

The following people have requested car sharing for this course.

Tony Griffin **BS9** [Send email](#)

Figure 74: Course car share - continued

You have the option to add another address to you personal details for car sharing.

Clicking the 'Send email' link will initiate the page that sends an email to the second user for car sharing, see [Figure 75: Car share - email person](#).

Email Person

Reply to skelly@maxcourse.co.uk

Email subject Car share to course: Management and leadership (23 Oct)

Email message Sean Kelly is interested in a car share with you to the Maxcourse Demo course Management and leadership which takes place on Fri 23 Oct 2009, please reply directly to skelly@maxcourse.co.uk. Further information from Sean Kelly follows.

Enter car share details

 Please note that your name and email address will be disclosed in this email.

Send message

Cancel

Figure 75: Car share - email person

When you are ready click 'Send message'.

Certificate

The course certificate for the course becomes available after the course has been run and the attendance validated by the course organiser.

3.7.2.3 Documents

Other course related documents can be found in this section.

3.8 Development Portfolio



This section pulls all the courses together to help make a personal development portfolio. You can also add external courses so all courses can be kept in one place.

The 'Development portfolio' page contains a page filter to allow you to find the courses you are interested in reviewing. See *Figure 76: Development portfolio*.

Development Portfolio

All course types Any date Go

User name Sean Kelly

[Add external course](#)

Date	Title	Type	CPD (hours)	
Thu 24 Sep 2009	Back pain - how to avoid it	External (verifiable)	4:00	Remove
Wed 7 Oct 2009	Digital photography in dentistry	Unconfirmed	7:00	
Fri 23 Oct 2009	Management and leadership	Unconfirmed	2:00	

CPD hours 4:00 external and 9:00 unconfirmed. A total of 13:00 hours.

Figure 76: Development portfolio

There are two filters on the page.

Filter 1: Manages the types of courses

- All course types
- Confirmed & external courses
- Confirmed
- External

Filter 2: Manages the time frame

- Any date
- 2009
- 2010
- ... (future years will also be displayed as time goes on)

3.8.1 Add external course

The system has the ability to store courses run by external providers and is included here as a service and to help you build and manage a comprehensive development portfolio, see [Figure 77: Add external course](#).

The screenshot shows a form titled "Add External Course". The form contains the following fields and controls:

- Title***: A text input field.
- Date***: Two dropdown menus for month and year, followed by a text input for the day and a calendar icon.
- Provider**: A text input field.
- Venue**: A text input field.
- CPD hours**: Two dropdown menus for hours and minutes.
- Verifiable**: A checkbox.
- Comments**: A large text area.
- Buttons**: "Add external course" and "Cancel".

Figure 77: Add external course

Title: Enter the title of the course.

Date: Enter the date the course was held on.

Provider: Enter who provided the course.

Venue: Enter where the course was held.

CPD hour: Enter the number of CPD hours.

Verifiable: Tick if the course met certain professional criteria.

Comments: Type any further information you wish to remember about the course.

3.8.2 Course title

If the course has been provided by this system, clicking the course title link will display the Course detail page, see [Manage course](#) on page 17.

If the course is an external course then the page that is displayed is the external course edit page.

3.8.3 Remove

External courses can be removed from the list.

3.9 Account history



This section pulls all of the transaction history together to show all the financial transactions made while using the site.

The page has a simple page filter that enables you to look at a particular years worth of transactions. The page is set out in a similar fashion to a regular bank statement itemising all of the transactions that have been made. See *Figure 78: Account history*.

The screenshot shows the 'Account History' page for user Sean Kelly. At the top right, there is a year filter set to '2009' and a 'Go' button. Below the user name, a table lists transactions. The table has five columns: Date, Description, Paid out (£), Paid in (£), and Balance (£). The transactions include a balance brought forward, a failed payment, two successful online payments, and a balance carried forward. At the bottom, a summary states the current balance is £0.00 and provides a link to 'Request balance refund'.

Date	Description	Paid out (£)	Paid in (£)	Balance (£)
	BALANCE BROUGHT FORWARD			0.00
14 Sep 09	Failed online payment of £20.00 for 1 course place (Ref: 3)			0.00
14 Sep 09	Online payment for 1 course place (Ref: 4)	20.00	20.00	0.00
14 Sep 09	Online payment for 1 course place (Ref: 5)	100.00	100.00	0.00
	BALANCE CARRIED FORWARD			0.00

This account currently has a balance of £0.00 Request balance refund

Figure 78: Account history

3.9.1 Pay outstanding balance

When the account is in debit, payment of the outstanding balance can be made by clicking this link. Depending on your system this will either take you to a payment method selection page, where either Online or Cheque payment can be selected, or directly to the Online payment page. See sections *Online payment* on page 44 and *Cheque payment* on page 46 for more information on these payment methods.

3.9.2 Request balance refund

When there is a credit on the account it is possible to 'request balance refund', by clicking this link a request is sent to a Manager who can look at the credit on the system and proceed with a credit refund.

3.9.3 Transaction reference


Where possible there are links embedded alongside a transaction that display more detailed information, see *Figure 79: View transaction reference*.

View Transaction: Reference 4

Related course bookings

Date	Title	Number of people	Booking cost (£)	
Fri 23 Oct 2009	Management and leadership	1	20.00	View booking

Related transactions


Date	Description	Booking charge (£)	Payment (£)	To/From Account (£)	Transaction Balance (£)
14 Sep 09	Booking for 1 course place (Ref: 4) 	20.00			20.00
	Confirmed online payment		-20.00		0.00
	NetBanx reference: 090914103402_4XXXX				
	Cardholder: Sean Kelly				
	Total	20.00	-20.00	0.00	

[Request transaction balance adjustment](#)

Booking Payment Confirmation

[Email confirmation](#) [Printable version](#)

Date	14 September 2009
User name	Sean Kelly
User ID	skelly
Maxcourse reference	MXNTY4
NetBanx reference	090914103402_4XXXX
Cardholder	Sean Kelly
Booking total	£20.00 (GBP)
Online payment	£20.00 (GBP)
Online payee	Maxinity Software

 Please note **Maxinity Software** will appear on your bank or credit card statement.

Course date	Title	Number of places	Booking cost (£)	Last cancellation date
Fri 23 Oct 2009	Management and leadership	1	20.00	Fri 25 Sep 2009
	Total	1	20.00	

The terms and conditions of using this site can be found at <http://mxlocal/maxcourse/maxinity/terms>.

Figure 79: View transaction reference

3.9.4 View booking

From this screen it is possible to view the course booking by clicking the 'view booking link'.

3.9.5 Request transaction balance adjustment

If a user rings requesting a refund you can click this link that will send an email to the person responsible to approve or deny the refund. The request is sent at the transaction level giving the approver all the detail they need to make an informed decision.

3.10 Edit user



Editing a user is central to user management and key to the Operator mode. The edit 'User details' page can be accessed either by first creating a new user, searching a user in the 'Search user' section or by clicking the link associated with a user's name on some other pages. See *Figure 80: User details*.

80: *User details*.

User Details		
Full name	Sean Kelly	Edit
User ID	skelly	Edit
Access rights	Standard user (since 15 Sep 2009)	Edit
Password	*****	Edit
Contact email address	Not set	Edit
Mobile	Not set	Edit
Addresses	1 address	Manage
Professions	1 profession	Manage
Contacts	No contacts	Manage
Subjects	No subjects	Manage
Preferences	Currently set to receive all newsletters and all emails	Edit
Personal details	Date of birth has been set	Edit

Figure 80: User details

3.10.1 Full name

Clicking edit will allow the title, full name and qualifications to be edited, see *Figure 81: Edit name*.

Edit Name: Sean Kelly	
Title	<input type="text"/>
First name	<input type="text" value="Sean"/> <small>Please note that course certificates will contain your name exactly as given, so if given as 'john' & 'smith', you certificates will be for 'john smith'</small>
Last name*	<input type="text" value="Kelly"/>
Qualifications	<input type="text"/>
<input type="button" value="Save changes"/> <input type="button" value="Cancel"/>	

Figure 81: Edit name

3.10.2 User ID

The user ID can be edited here and is used as a unique identifier that is searchable in the site. The user ID should be edited to enter a user's email address which is the primary method of identifying and searching for a user. Without a valid email address a user will not be able to communicate with the site (receive alerts, etc.) or book on a course. See *Figure 82: Edit user ID or email*.

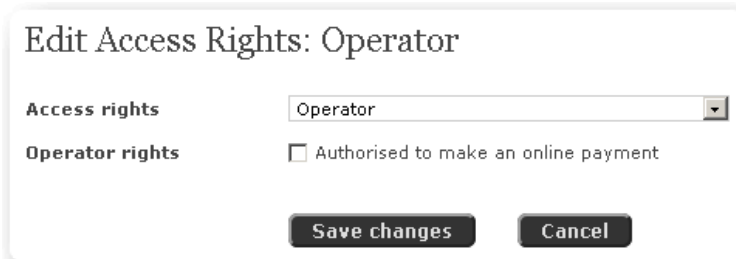


The screenshot shows a form titled "Edit User ID: skelly". It contains a text input field labeled "User ID*" with the value "skelly" entered. Below the input field are two buttons: "Save changes" and "Cancel".

Figure 82: Edit user ID or email

3.10.3 Access rights

After a user has just been created they have 'Standard user' rights. You can change the access rights between, Deceased, Inactive user, Restricted user, Absentee ban, Standard user, Organiser, Operator, Administrator, Manager and System manager; see *Figure 83: Edit access rights*.



The screenshot shows a form titled "Edit Access Rights: Operator". It contains a dropdown menu labeled "Access rights" with "Operator" selected. Below it is a checkbox labeled "Operator rights" with the text "Authorised to make an online payment" next to it, which is currently unchecked. At the bottom are two buttons: "Save changes" and "Cancel".

Figure 83: Edit access rights

NOTE



Access rights can only be changed by Managers and cannot be set with greater privileges than the current logged in user level. For example, a Manager can set the access rights to Manager and below but cannot set it System manager.

Only System managers can set whether a user is authorised to make online payments in Operator mode. Training of Operators is a base requirement of PCI compliance.

3.10.3.1 Automatic removal of absentee ban

When a user's access rights are set to 'Absentee ban' they are no longer allowed to book on courses (their existing bookings are unaffected). You can set a date on which the ban will be automatically lifted by the system, see *Figure 86: Edit absentee ban removal date*, the banned user will also be able to see this date in their user details page.

Figure 84: Edit absentee ban removal date

3.10.4 Password

The password must be no less than 6 characters and for improved security it should contain a variety of different type of characters (i.e. composed of upper and lower case letters, numbers and some non-alphanumeric characters such as underscore). See [Figure 85: Edit password](#).

Figure 85: Edit password

NOTE



In the Operator interface the password edit is in plain text and not the standard hidden character method. This is intentional as user creation will be during a telephone call and it must be possible to check and confirm the password itself.

A valid password is never displayed.

3.10.5 Contact email address

Edit the email address to be used by the system when the user needs to be contacted, this option is only available when the user account is using an ID; see [Figure 86: Edit contact email address](#). The contact email address does have to be a personal email address, it could, for example, be a share work address. The email address is only used to inform the user when a pending profession has been approved or for any message sent about a course they are booked on.

Edit Contact Email Address

i A contact email address should only be used if the user does not have a personal email address (i.e. they are using a shared email address); if they have a personal email please change their User ID to the email address so they can benefit from the full functionality of the site.

Contact email address

A contact email address is only used to inform you when a pending profession has been approved and for any message sent about a course you are booked on.

Save changes **Cancel**

Figure 86: Edit contact email address

3.10.6 Mobile

Edit the mobile telephone number by clicking edit here, see *Figure 87: Edit mobile telephone number*.

Edit Mobile

Mobile

Save changes **Cancel**

Figure 87: Edit mobile telephone number

3.10.7 Addresses

It is possible to enter multiple addresses into the system. One address must be designated a correspondence address, see *Figure 88: Manage addresses*.

Manage Addresses: 1 address

An address is required in order to receive course correspondence and for car sharing (if used).

[Add new address](#)

Line 1	Town/City	Postcode	
47 Hill Grove	Bristol	BS9 4RG	Correspondence address

Figure 88: Manage addresses

'Add new address' creates a new address for the user. Clicking on a current address enables the address to be edited.

3.10.8 Professions

Users can specify one or more professions. This enables detailed reporting, focused direct marketing and allows target audiences to be set for courses. This section is used to manage the professions, see [Figure 89: Manage professions](#). This shows the profession management page with the profession 'Dentist' set for the user.

Manage Professions: 1 profession

A profession is required to enrol on some of the courses; profession specific information about courses can also be sent to you by email.

[Add profession](#)

Name	State	
Dentist	Accepted	Edit Remove

Figure 89: Manage professions

'Add profession' will allow another profession to be assigned to the user. 'Edit' changes the state of the profession, see [Figure 90: Edit profession](#). This shows the different possible states for a profession. The list of professions is set by Managers and depending on how they have been configured a user may be required to enter a valid certificate number to be approved for a profession.

Edit Profession: Dentist

Dentist registered to practice in the UK

State

- Denied - addition of the profession was denied by administration
- Accepted - profession was automatically added, no approval required
- Pending approval - addition of the profession is waiting for approval by administration
- Approved - addition of the profession has been approved by administration

[Save changes](#) [Cancel](#)

Figure 90: Edit profession

'Remove' disassociates the profession from the user.

3.10.9 Contacts

Adding a friend/colleague as a contact enables you to book them on a course. Please note that some courses require a pair booking (e.g. a Doctor and a Nurse). You can manage them in this section.

Add contact: Opens the add contact dialog were an email address of a currently registered user can be used to request the contact. This request must be accepted to confirm the contact. See [Figure 91: Add contact](#).

Add Contact

A new contact must already have a user account; **they must login and accept your request before you can book them on a course**. To add a new contact please enter their **User ID** in the box below.

Contact's user ID

[Add contact](#) [Cancel](#)

Figure 91: Add contact

Confirmation pending: The contact management page will display 'Confirmation pending' until the user responds and accepts the contact or cancels the request.

Remove: An active contact can simply be removed at any time.

3.10.10 Subjects

Subjects can help list areas of special interest and is used in searching for specific courses and also you can receive email communication relating to your registered subjects. See *Figure 92: Manage subjects*.

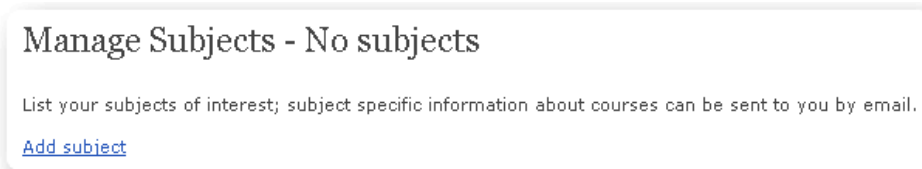


Figure 92: Manage subjects

Add subject: Allows the registering of current subjects to the user account.

Remove: The subject can at any time be removed from the list.

3.10.11 Preferences

The user can opt in or out of certain types of communication, see *Figure 93: Edit preferences*.

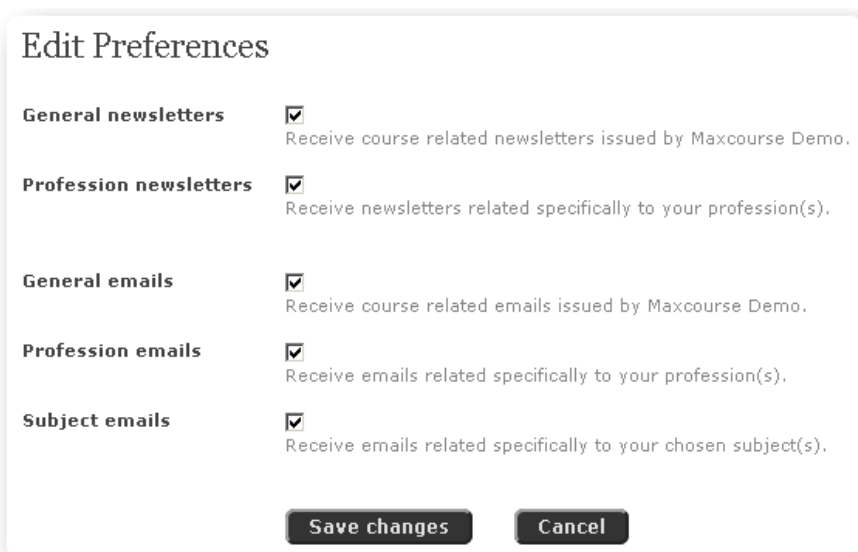


Figure 93: Edit preferences

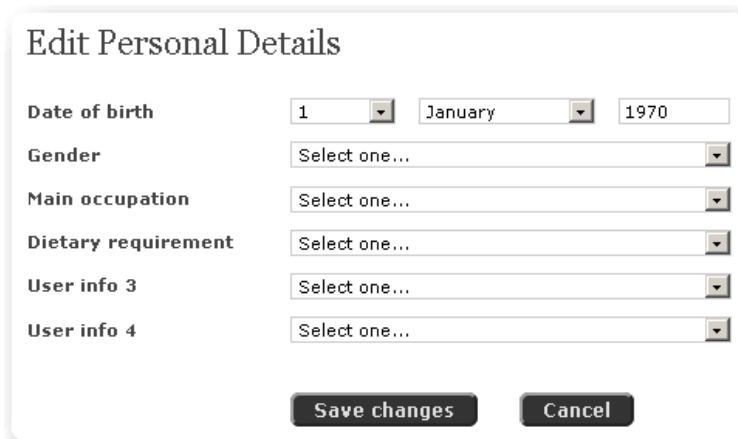


NOTE

The Reminder emails option will only be available if course email reminders have been enabled, see *Course settings* on page 88.

3.11 Personal details

There are a certain amount of personal details that can be edited by the user, see *Figure 94: Edit personal details*.



Edit Personal Details

Date of birth: 1 January 1970

Gender: Select one...

Main occupation: Select one...

Dietary requirement: Select one...

User info 3: Select one...

User info 4: Select one...

Save changes Cancel

Figure 94: Edit personal details

NOTE



The User info 1 - 4 are customisable settings, their use is defined during installation. Throughout this manual User info 1 has been customised to store a user's main occupation and User info 2 to store dietary requirements.

4 Manager

4.1 Current issues



This page shows any current issues with courses. These issues can be filtered to find those that are relevant to the user at that time.

This page is available to Managers and System Managers

There are two filters:

Filter 1:

- Summary of all issues
- All user issues
- Outstanding profession approvals
- Outstanding balance adjustments
- Outstanding balance refunds
- User accounts in debit
- Unconfirmed online payments
- Unconfirmed cheque payments
- High absenteeism
- All course issues
- Courses with Live EDIT state
- Courses with Cancelled EDIT state
- Courses late in creation
- Courses waiting for approval
- Attendance requirement not met
- Not fully booked with waiting list
- With unknown attendance state

Filter 2:

- All issues
- My issues
- <Region one>
- <Region two>
- <Region three>...

Clicking on user's names or course titles of the resulting issue list will take you directly to the user or course where the required change/remedial action can be taken.

4.2 Communication

This section is used to manage communication with the end users or specific user groups. The system allows you to create and save both newsletter and email templates to generate regular information bulletins for users.

4.2.1 General newsletter



A newsletter is a formatted HTML page that is embedded into an email. A general newsletter is one that is sent to every registered user of the system.

After clicking on the General newsletter icon you will be directed to the newsletter filters page, see [Figure 95: General newsletter - filters](#).

General Newsletter - Filters

Main occupation: All Main occupations

Postcode filter: [Text Input Field]

Optionally enter a space separated list of postcode areas (e.g. 'W SW SE' or 'W NW10')

Continue

Figure 95: General newsletter - filters

Main occupation: This is a filter based on the first User info field, the availability of filtering newsletters based on User Info fields is defined during installation. If a specific value is selected the newsletter will only be sent to users whose User Info is set to the selected value.

Postcode filter: Enter a list of postcodes to send the newsletter to or leave empty so disable this filter.

After setting the required filtering options clicking on the 'Continue' button to go to the main newsletter creation page, see [Figure 96: General newsletter](#). An error is returned if no newsletters would be sent as a result of the filtering options.

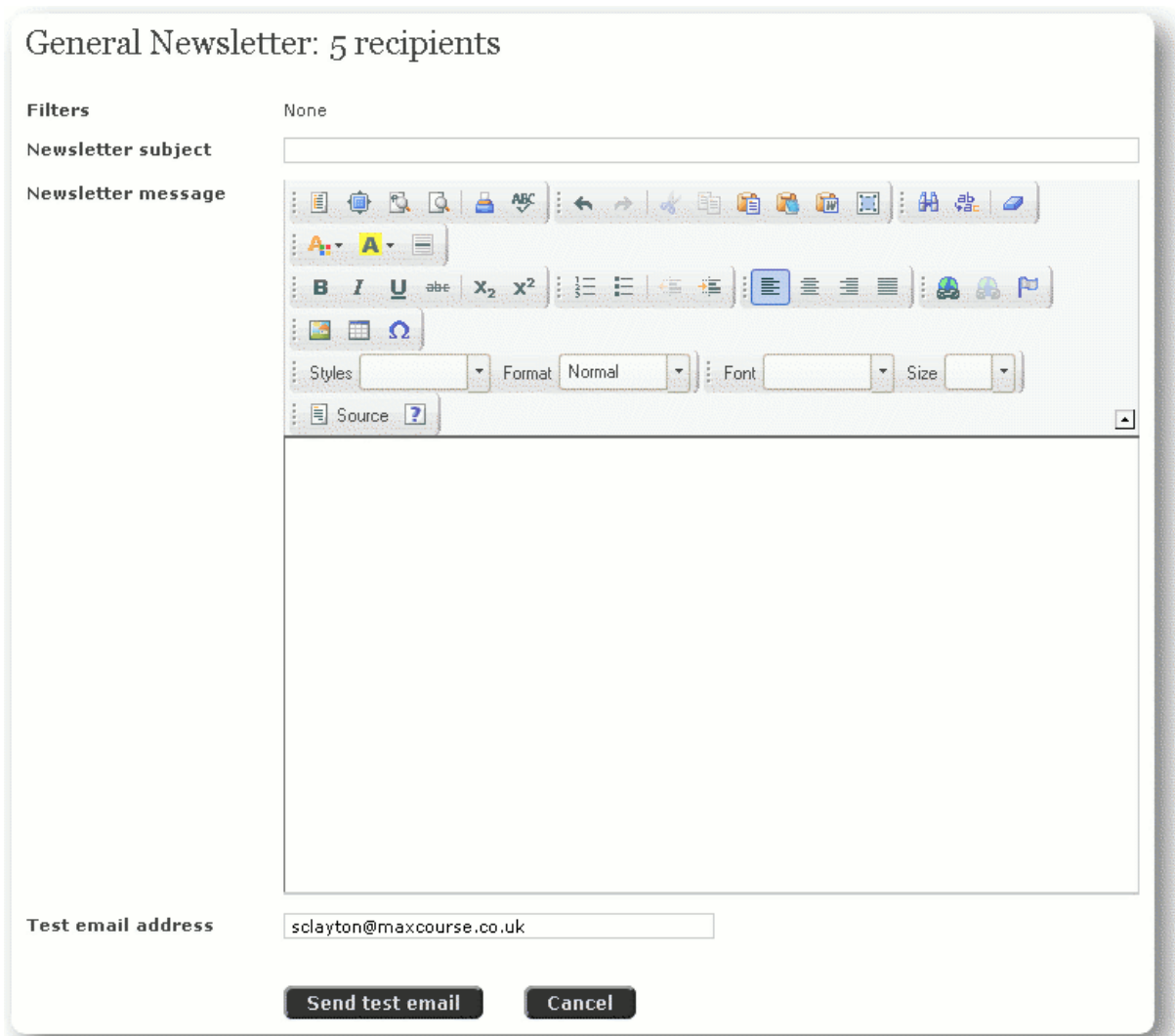


Figure 96: General newsletter

Newsletter subject: Enter the subject text that will appear in the subject of the email that is sent with the embedded newsletter.

Newsletter message: Enter the body of the newsletter here. Maxcourse uses the CKEditor that allows you to create visually attractive newsletters; this is accessed by clicking on the down arrow to expand the toolbar. The CKEditor has the standard formatting options similar to those found in most editors. You can choose to format your newsletter using one of the predefined templates available in the editor.

Test email address: Enter an address to send a copy of the newsletter to. A test copy is sent first to this email address, giving you the chance to check the newsletter before sending it to everyone else.

Send test email: When you have completed your newsletter click this button to continue.

General newsletter - confirm: The page that displays tells you that the newsletter has been sent to the given test email address, see *Figure 97: General newsletter - confirm*. Use your usual email program to receive and check this email is correct; once you have confirmed the newsletter is correct click on the **Confirm** button to continue.

General Newsletter - Confirm

Filters None

Newsletter subject Latest news from Maxcourse

The newsletter has been sent to **sclayton@maxcourse.co.uk**, click the *Confirm* button below to send this newsletter to all General newsletter subscribers (5 people).

Confirm **Cancel**

Figure 97: General newsletter - confirm

Sending confirmation: The page that displays tells you that your newsletter is being sent, and when it has been successfully sent the conformation message appears. See *Figure 98: Sending general newsletter*.

Sending General Newsletter

Newsletter subject Latest news from Maxcourse


 Do not refresh or reload this page otherwise the newsletter may be sent twice.

Sending ... COMPLETE

5 emails sent.

Figure 98: Sending general newsletter

Postcode filter: Enter a list of postcodes to send the newsletter to or leave empty so disable this filter.



WARNING

Do not refresh the page otherwise the newsletter may be sent twice.

4.2.2 Profession newsletter



A newsletter is a formatted HTML page that is embedded into an email. A Profession newsletter is one that is sent to every registered user of the system who has the specific profession.

After clicking on the Profession newsletter icon you will be directed to the newsletter filter page, see *Figure 99: Profession newsletter - filters*.

Profession Newsletter - Filters

Profession

Main occupation

Postcode filter

Optionally enter a space separated list of postcode areas (e.g. 'W SW SE' or 'W NW10')

Continue

Figure 99: Profession newsletter - filters

After selecting the profession and filtering options (see General Newsletter above) click on 'Continue' to go to the main newsletter creation page, See [Figure 100: Profession newsletter](#). An error is returned if no newsletters would be sent as a result of the filtering options.

Profession Newsletter: 2 recipients

Profession Dentist

Filters None

Newsletter subject

Newsletter message

Test email address sclayton@maxcourse.co.uk

Send test email Cancel

Figure 100: Profession newsletter

Newsletter subject: Enter the subject text that will appear in the subject of the email that is sent with the embedded newsletter.

Newsletter message: Enter the body of the newsletter here. Maxcourse uses the CKEditor that allows you to create visually attractive newsletters; this is accessed by clicking on the down arrow to expand the toolbar. The CKEditor has the standard formatting options similar to those found in most editors. You can choose to format your newsletter using one of the predefined templates available in the editor.

Test email address: Enter an address to send a copy of the newsletter to. A test copy is sent first to this email address, giving you the chance to check the newsletter before sending it to everyone else.


Send test email: When you have completed your newsletter click this button to continue.

Profession newsletter - confirm: As with General newsletters, the page that displays tells you that the newsletter has been sent to the given test email address. Use your usual email program to receive and check this email is correct; once you have confirmed the newsletter is correct click on the **Confirm** button to continue.

Sending confirmation: The page that displays tells you that your newsletter is being sent, and when it has been successfully sent the conformation message appears, see [Figure 101: Sending profession newsletter](#).




Figure 101: Sending profession newsletter



WARNING

Do not refresh the page otherwise the newsletter may be sent twice.

4.2.3 General email

 An email is a mostly non-formatted communication tool. A General email is one that is sent to every registered user of the system who has subscribed to General emails (see Preferences in user details).

After clicking on the General email icon you will be directed to the email filters page, see [Figure 102: General email - filters](#).

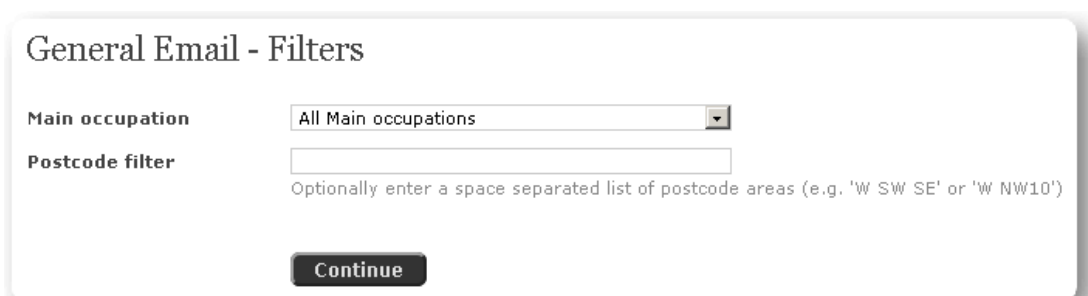


Figure 102: General email - filters

Main occupation: This is a filter based on the first User info field, the availability of filtering emails based on User Info fields is defined during installation. If a specific value is selected the email will only be sent to users whose User Info is set to the selected value.

Postcode filter: Enter a list of postcodes to send the email to or leave empty so disable this filter.

After setting the required filtering options clicking on the 'Continue' button to go to the main email creation page, see [Figure 103: General email](#). An error is returned if no email would be sent as a result of the filtering options.

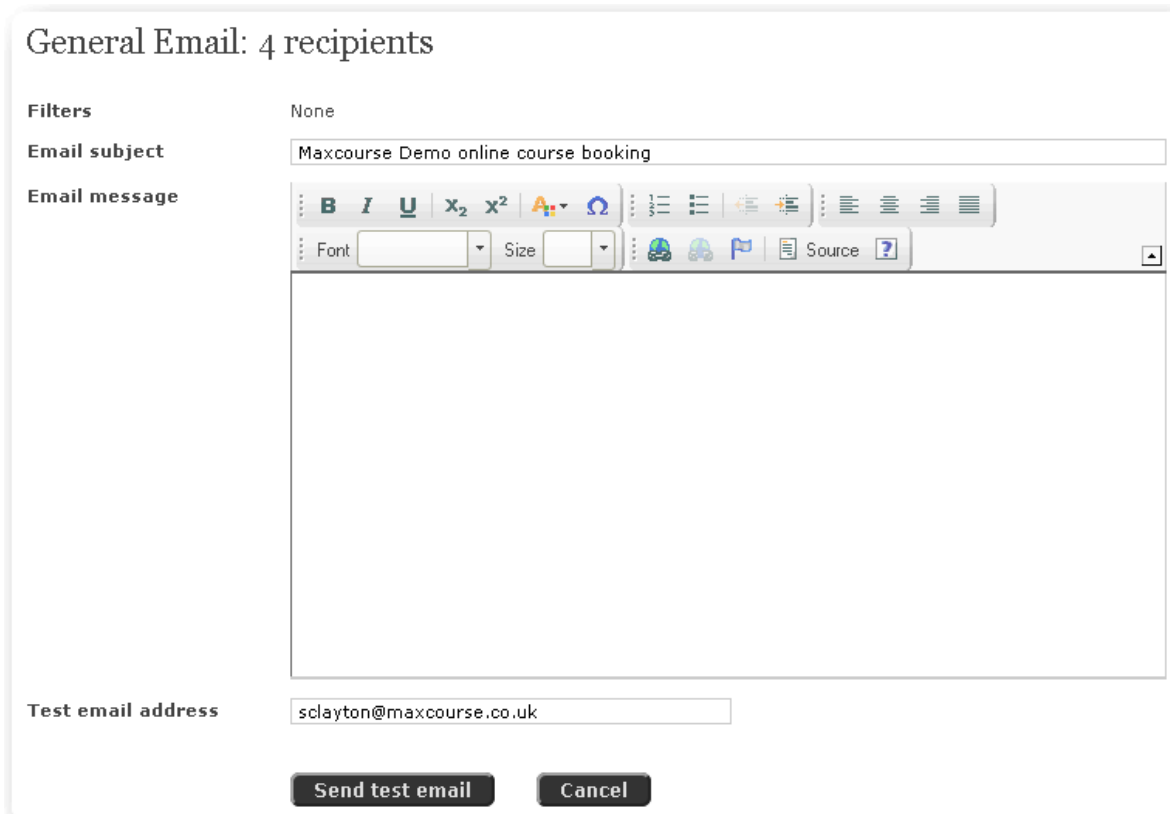


Figure 103: General email

Email subject: The default subject text can be edited to something more suitable.

Email address: The body of the text is entered here.

Test email address: Enter an address to send a copy of the email to. A test email is sent first to this email address, giving you the chance to check the email before sending it to everyone else.

Send test email: When you have completed your email click this button to continue.

General email - confirm: The page that displays tells you that the email has been sent to the given test email address, see *Figure 104: General email - confirm*. Use your usual email program to receive and check this email is correct; once you have confirmed the email is correct click on the **Confirm** button to continue.

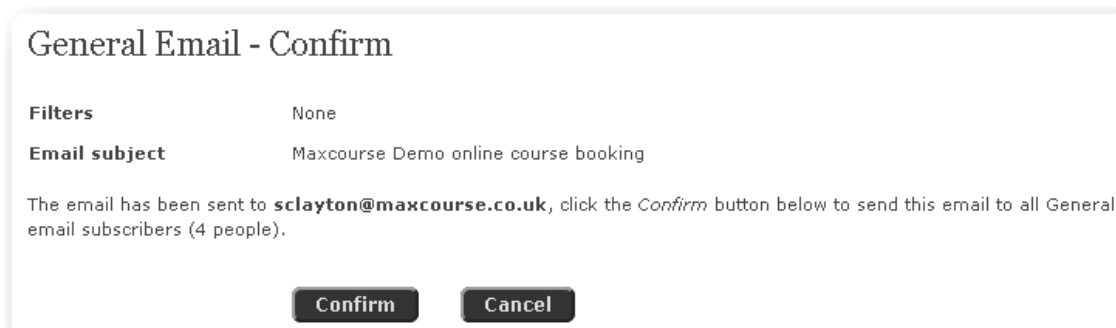


Figure 104: General email - confirm

Sending confirmation: The page that displays tells you that your email is being sent, and when it has been successfully sent the conformation message appears, see *Figure 105: Sending general email*.

Sending General Email

Filters None

Email subject Maxcourse Demo online course booking

⚠ Do not refresh or reload this page otherwise the email may be sent twice.

Sending ... COMPLETE

4 emails sent.

Figure 105: Sending general email



WARNING

Do not refresh the page otherwise the email may be sent twice.

4.2.4 Profession email



An email is a mostly non-formatted communication tool. A Profession email is one that is sent to every registered user of the system who has the specific profession.

After clicking on the profession email icon you will be directed to the email filters page, see [Figure 106: Profession email - filters](#).

Profession Email - Filters

Profession

Main occupation

Postcode filter

Optionally enter a space separated list of postcode areas (e.g. 'W SW SE' or 'W NW10')

Continue

Figure 106: Profession email - filters

After selecting the profession and filtering options (see General Email above) click on 'Continue' to go to the main email creation page, see [Figure 107: Profession email](#). An error is returned if no emails would be sent as a result of the filtering options.

Profession Email: 2 recipients

Profession Dentist

Filters None

Email subject Maxcourse Demo online course booking: Dentist

Email message

Font Size

Test email address sclayton@maxcourse.co.uk

Send test email **Cancel**

Figure 107: Profession email

Email subject: The default subject text can be edited to something more suitable.

Email address: The body of the text is entered here.

Test email address: Enter an address to send a copy of the email to. A test email is sent first to this email address, giving you the chance to check the email before sending it to everyone else.

Send test email: When you have completed your email click this button to continue.

Profession email - confirm: As with General emails, the page that displays tells you that the email has been sent to the given test email address, see *Figure 108: Profession email - confirm*. Use your usual email program to receive and check this email is correct; once you have confirmed the email is correct click on the **Confirm** button to continue.

Profession Email - Confirm

Profession Dentist

Filters None

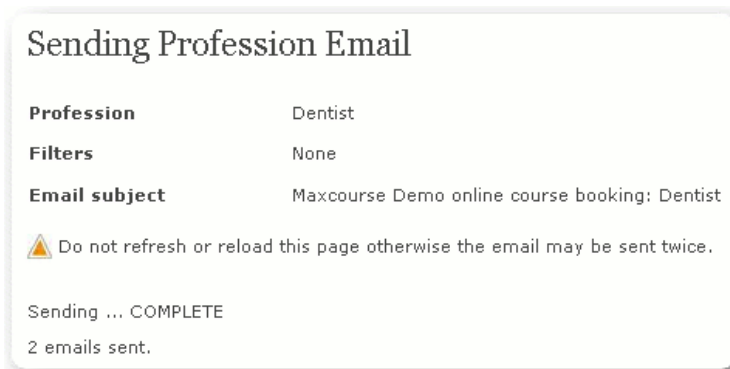
Email subject Maxcourse Demo online course booking: Dentist

The email has been sent to **sclayton@maxcourse.co.uk**, click the *Confirm* button below to send this email to all Dentist profession email subscribers (2 people).

Confirm **Cancel**

Figure 108: Profession email - confirm

Sending confirmation: The page that displays tells you that your email is being sent, and when it has been successfully sent the conformation message appears, see *Figure 109: Sending profession email*.



The screenshot shows a confirmation box titled "Sending Profession Email". It contains the following information:

Profession	Dentist
Filters	None
Email subject	Maxcourse Demo online course booking: Dentist

Below the table is a warning icon (a yellow triangle with an exclamation mark) and the text: "Do not refresh or reload this page otherwise the email may be sent twice."

At the bottom, it says "Sending ... COMPLETE" and "2 emails sent."

Figure 109: Sending profession email



WARNING

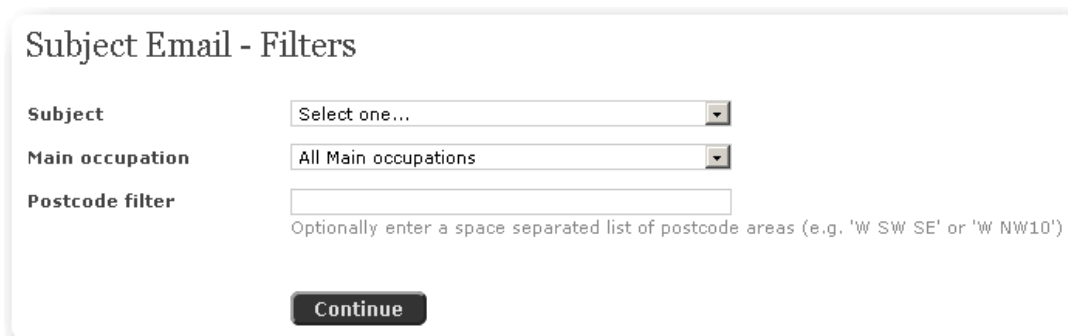
Do not refresh the page otherwise the email may be sent twice.

4.2.5 Subject email



An email is a mostly non-formatted communication tool. A subject email is one that is sent to every registered user of the system who is registered with the specific subject.

After clicking on the subject email icon you will be directed to the email filters page, see *Figure 110: Subject email - filters*.



The screenshot shows a form titled "Subject Email - Filters". It has three main sections:

- Subject:** A dropdown menu with "Select one..." as the current selection.
- Main occupation:** A dropdown menu with "All Main occupations" as the current selection.
- Postcode filter:** A text input field. Below it is a note: "Optionally enter a space separated list of postcode areas (e.g. 'W SW SE' or 'W NW10')".

At the bottom of the form is a dark grey button labeled "Continue".

Figure 110: Subject email - filters

After selecting the subject and filtering options (see General Email above) click on 'Continue' to go to the main email creation page, see *Figure 111: Subject email*. An error is returned if no emails would be sent as a result of the filtering options.

Subject Email: 3 recipients

Subject Health and safety

Filters None

Email subject Maxcourse Demo online course booking: Health and safety

Email message

Font Size

Test email address sclayton@maxcourse.co.uk

Send test email **Cancel**

Figure 111: Subject email

Email subject: The default subject text can be edited to something more suitable.

Email address: The body of the text is entered here.

Test email address: Enter an address to send a copy of the email to. A test email is sent first to this email address, giving you the chance to check the email before sending it to everyone else.

Send test email: When you have completed your email click this button to continue.

Subject email - confirm: As with General emails, the page that displays tells you that the email has been sent to the given test email address. Use your usual email program to receive and check this email is correct; once you have confirmed the email is correct click on the **Confirm** button to continue.

Sending confirmation: The page that displays tells you that your email is being sent, and when it has been successfully sent the conformation message appears, see *Figure 112: Sending subject email*.

Sending Subject Email

Subject Health and safety

Email subject Maxcourse Demo online course booking: Health and safety

⚠ Do not refresh or reload this page otherwise the email may be sent twice.

Sending ... COMPLETE

3 emails sent.

Figure 112: Sending subject email



WARNING

Do not refresh the page otherwise the email may be sent twice.

4.2.6 Global email



An email is a mostly non-formatted communication tool. A global email is one that is sent to every registered user.



WARNING

Users cannot opt-out of Global emails - therefore they should only be used when essential otherwise users who do not wish to receive them may start ignoring all emails for the system.

After clicking on the global email icon you will be directed to the creation page, see [Figure 113: Global email](#).

Global Email: 6 recipients

Global email should only be used in exceptional circumstances as users cannot unsubscribe from these emails.

Email subject

Email message

Test email address

Figure 113: Global email

Email subject: The default global text can be edited to something more suitable.

Email address: The body of the text is entered here.

Test email address: Enter an address to send a copy of the email to. A test email is sent first to this email address, giving you the chance to check the email before sending it to everyone else.

Send test email: When you have completed your email click this button to continue.

Global email - confirm: As with General emails, the page that displays tells you that the email has been sent to the given test email address. Use your usual email program to receive and check this email is correct; once you have confirmed the email is correct click on the **Confirm** button to continue.

Sending confirmation: The page that displays tells you that your email is being sent, and when it has been successfully sent the conformation message appears, see *Figure 114: Sending global email*.

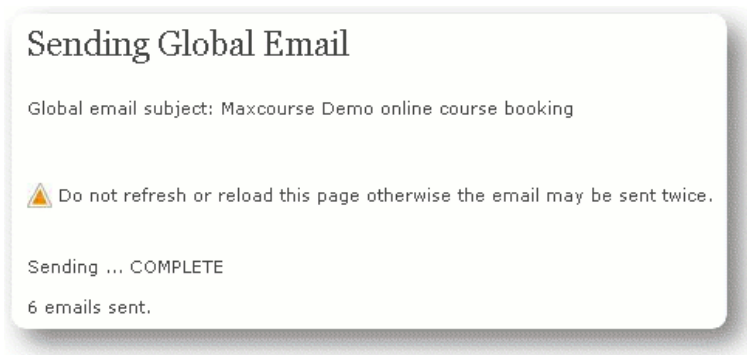


Figure 114: Sending global email



WARNING

Do not refresh the page otherwise the email may be sent twice.

4.3 Course administration



The course administration section gives Managers access to the site's system course resources and settings. It is available under the Manager mode.

When you click on the icon on the main home page you are directed to the 'Course administration' page. See *Figure 115: Course administration*.

You can set:

- Subjects
- Professions
- Course info 1 (Course style)
- Course info 2 (Catering)
- Course info 3
- Course info 4
- Lecturers
- Regions
- Venues
- Settings



NOTE

Course info 1 - 4 are customisable settings, their use is defined during installation. Throughout this manual Course info 1 has been customised to store a course style setting and Course info 2 to store catering information.

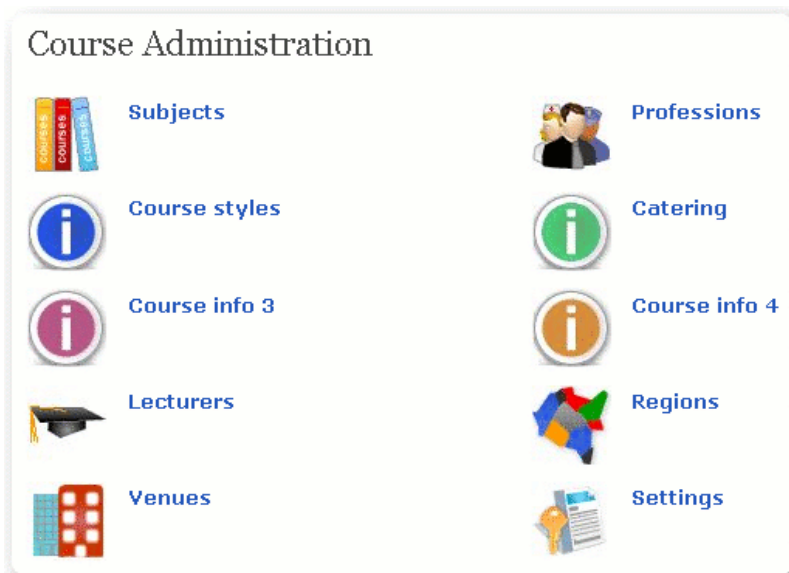


Figure 115: Course administration

4.3.1 Manage subjects



A registered user can choose to select a number of subjects that they are interested in. This feature can be very powerful and is used throughout the site, for instance the default view for the calendar and course search list is to the selected courses. You can also communicate with users that are interested in specific subjects (this way a user can choose to receive subject specific updates). A lecturer can be designated to lecture on a subject; this helps the course organiser plan courses. See *Figure 116: Manage subjects*. This shows the labels of each subject and the state for each subject.

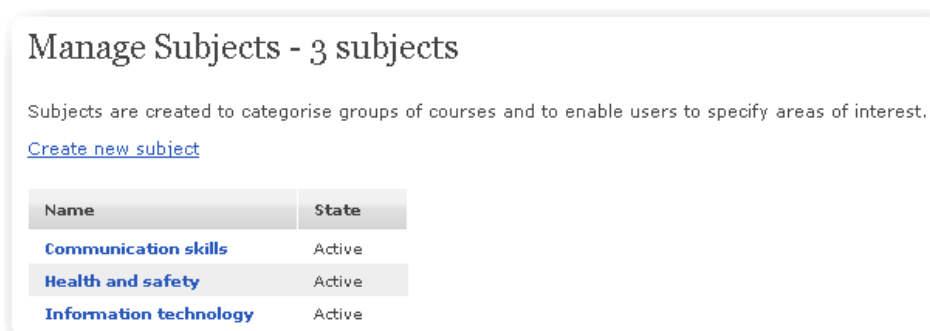


Figure 116: Manage subjects

Clicking on 'Create new subject' will allow you to enter in a name for your new subject, see *Figure 117: Create new subject*.



Figure 117: Create new subject

By default the new subject is created as active and ready to be used. When you click on an existing subject you are led onto the 'Edit subject' page, see *Figure 118: Edit subject*.

Figure 118: Edit subject

On the edit field you can change the name and set the three states of a subject:

Active: new courses with this subject can be created

Retired: new courses cannot be created but users can search for courses with this subject

Hidden: cannot create new courses or search for this subject

Click on 'Save changes' when you are done.

4.3.2 Manage professions



Courses can be set up with target audiences that can be made a mandatory requirement for booking. The target audience comes directly from the professions field. You can also communicate with the user base by targeting specific professions. The profession can also be set up so the user is validated against the profession to become a member of it, they may even be made to fill out certain information in order to be granted the profession status. See [Figure 119: Manage professions](#).

Name	State	Description
Dentist	Active	Dentist registered to practice in the UK
Doctor	Active	Medical doctor registered to practice in the UK
Manager	Active	A practice manager
Nurse	Active	

Figure 119: Manage professions

Clicking on 'Create new profession' will allow you to enter in a name for your new profession. When you click on an existing profession you are led onto the 'Edit profession' page, see [Figure 120: Edit profession](#).

Edit Profession: Nurse

Name*

Description

Applicant requirements

- Date of birth
- Gender
- Main occupation
- Dietary requirement
- User info 3
- User info 4
- Home address
- Work address
- Certificate number

Certificate name

Admin requirements Approval for each applicant

Admin email address

State

- Active - users can add this profession and new course target audiences can be created with this profession
- Retired - users cannot add this profession, nor can new course target audiences, but users can search for courses with this profession as a target audience
- Hidden - cannot add, create target audience or search for this profession

Figure 120: Edit profession

Name: This is the name of the profession and is the only mandatory field on the page.

Description: Enter a description of the profession here to guide the user to selecting the most appropriate profession.

Applicant requirements:

- **Date of birth:** By selecting this option it will be a requirement for the user to enter their date of birth to become a member of the profession.
- **Gender:** By selecting this option it will be a requirement for the user to set their gender to become a member of the profession.
- **User info 1 - 4:** User info 1 - 4 (the first two shown as Main occupation & Dietary requirement) are customisable settings. By selecting these options it will be a requirement to set their value to become a member of the profession.
- **Home address:** By selecting this option it will be a requirement to enter a home address to become a member of the profession.
- **Work address:** By selecting this option it will be a requirement to enter a work address to become a member of the profession.
- **Certificate number:** By selecting this option it will be a requirement to enter a certificate number to become a member of the profession.

Certificate name: Some professions have to belong to a professional body or register with an institution. This option is where you type in the name or reference to make the user understand what needs to be entered.

Admin requirements: It might be very important to the course booking mechanism to make sure a user is of the profession he is registered on the site as. By checking this box the automatic assignment of

a profession is suspended pending a manual checking procedure by an authorised member of staff. By checking this option the email address below is a mandatory field.

Admin email address: As stated in 'Admin requirements' above this field is mandatory if the box is checked. Enter a valid email address of the person responsible for validating the user against a profession.

State: In the state section you are able to set the three states of profession

- **Active:** new courses with this profession can be created
- **Retired:** new courses cannot be created but users can search for courses with this profession
- **Hidden:** cannot create new courses or search for this profession

Click on 'Save changes' when you are done.

4.3.3 Manage course info 1 - 4



The 'Course info' options enables the courses to be identified in a particular way, for instance it could be that a course is funded in a particular way or attending the course will lead the user to getting credit towards a qualification. See *Figure 121: Manage course info*.

NOTE



The label 'Course info 1' will not appear in a true installation and will be replaced to something more applicable to the client, throughout this manual the label 'Course style' has been used.

Name	Icon	State
Hands-on		Active
Lecture		Active
Workshop		Active

Figure 121: Manage course info

Clicking on 'Create new course info' will allow you to enter in a name for your new course info value. When you click on an existing value you are led onto the Edit page. See *Figure 122: Edit course info*.

Edit Course Style: Hands-on

Name*

Icon

State

Active - new courses can be created with this course style

Retired - new courses cannot be created but users can search for courses with this course style

Hidden - cannot create new courses or search for this course style

Figure 122: Edit course info

On the edit page you are able to change the name, the icon, and the state of the item:

Active: new courses with this item can be created

Retired: new courses cannot be created but users can search for courses with this item

Hidden: cannot create new courses or search for this item

Click on 'Save changes' when you are done.



NOTE

There are up to four course info options. Please repeat the procedures set out above for each course info available on your server.

4.3.4 Manage lecturers



By clicking on the Lecturers icon on the Course admin page you enter the lecturer database and are able to manage all the lecturers on the system.

All lecturers on the system are users. They may not be actively using the site but some of the lecturer data is stored in the user section of the database. Maxcourse respects the privacy of all its users and therefore it is necessary to restrict who can edit the lecturer data to Managers.



WARNING

A lecturer may have current live courses; you are therefore effectively editing LIVE data when you edit a lecturer. Great care must be taken.

On clicking the Lecturer icon you can click 'Create new lecturer' or choose from the list of current lecturers to edit.

4.3.4.1 Create new lecturer

Enter the name of the lecturer you want to create, see *Figure 123: Create new lecturer*.

Create New Lecturer

Last name*

Enter the last name of the lecturer to search for their user account.

Continue Cancel

Figure 123: Create new lecturer

After clicking 'Continue' you will be presented with one of the following:

- The surname of the proposed lecturer does not exist, or it does exist but it is not the user you require. You have the option to 'Create a new user account' for the proposed lecturer.
- The surname of the proposed lecturer exists:
 - a. The user is not currently a lecturer. You can click on the users name to make them a lecturer and after confirming move on to the edit page of the lecturer. See next section.

- b. The user is a current lecturer and you can click on the users name to go to the edit page for the lecturer. See next section.

4.3.4.2 Edit lecturer

From the Manage Lecturers page, clicking on the lecturer's name takes you to the 'Edit Lecturer' page, this allows you to edit the lecturer's name, state and contact details, see *Figure 124: Edit lecturer*.

Edit Lecturer: Lynda Boothroyd

Title	<input type="text" value="Dr"/>
First name	<input type="text" value="Lynda"/>
Last name*	<input type="text" value="Boothroyd"/>
Qualifications	<input type="text"/>
State	<input checked="" type="radio"/> Active - new courses can be created with this lecturer <input type="radio"/> Retired - new courses cannot be created but users can search for courses with this lecturer <input type="radio"/> Hidden - cannot create new courses or search for this lecturer
Contact details	
Email address	<input type="text" value="lboothroyd@maxcourse.co.uk"/>
Telephone number	<input type="text" value="01275 331 901"/>
Address line 1	<input type="text" value="Unit 4E"/>
Address line 2	<input type="text" value="Winford Business Park"/>
Address line 3	<input type="text" value="Littleton Mills"/>
Town/City	<input type="text" value="Winford"/>
County	<input type="text" value="Bristol"/>
Postcode	<input type="text" value="BS40 8HJ"/>

Figure 124: Edit lecturer

NOTE



This page does not allow the lecturer's name or email address to be set if they are an active user of the site, this is because you would be changing important account details. The operator mode can be used to make these changes if required.

A lecturer's state can be set, to either:

Active: new courses can be created with this lecture

Retired: new courses cannot be created but users can search for courses with this lecturer

Hidden: cannot create new courses or search for this lecturer

NOTE



A lecturer's contact telephone and address are stored as a special user address which a lecturer, who is an active user of the site, can edit themselves using the Manage address interface found with User details.

A lecturer's subjects can be edited by clicking on the 'Subjects' link, see *Figure 125: Manage lecturer subjects*. Setting a lecturer's subjects correct will help organisers locate a suitable lecturer for their course.

Name	
Communication skills	Remove
Health and safety	Remove

Figure 125: Manage lecturer subjects

4.3.5 Manage regions



Regions are used on the site to help find courses in a geographic region, see *Figure 126: Manage regions*.

Name	State
Cornwall	Active
Devon	Active
Gloucestershire	Active
Somerset	Active
Wiltshire	Active

Figure 126: Manage regions

Clicking on 'Create new region' will allow you to enter in a name for your new region. When you click on an existing region you are led onto the 'Edit region' page, see *Figure 127: Edit region*.

Name*

State

Active - new venues can be created with this region

Retired - new venues cannot be created but users can search for courses with this region

Hidden - cannot create new venues or search for this region

[Save changes](#) [Cancel](#)

Figure 127: Edit region

On the edit page you are able to change the name and set the three states of region:

Active: new venues with this region can be created

Retired: new venues cannot be created but users can search for courses with this region

Hidden: cannot create new venues or search for this region

Click on 'Save changes' when you are done.

4.3.6 Manage venues



Venues are integral to the running of courses and in this section you are able to manage all the venues you use, see *Figure 128: Manage venues*.

NOTE



Course organisers and administrators are not able to edit venues as the data about the venue could be live in other courses and is therefore regarded as sensitive data. To avoid the possibility of duplicate entries they are also unable to create venues. Organisers and Administrators are able to submit requests for new venues to Managers so they can be added to the venue database if appropriate to do so.

Name	Region	State	Further details
Treliske Hospital	Cornwall	Active	Upload
Gipsy Hill Hotel	Devon	Active	Upload
Prince of Wales Hotel	Gloucestershire	Active	Upload
Mount Somerset Hotel	Somerset	Active	Upload

Figure 128: Manage venues

Clicking on 'Create new venue' will allow you to enter in a name for your new venue. When you click on an existing venue you are led onto the 'Edit venue' page, see *Figure 129: Edit venue*.

Edit Venue: Mount Somerset Hotel

Name*	<input type="text" value="Mount Somerset Hotel"/>
Region*	<input type="text" value="Somerset"/>
Address line 1*	<input type="text" value="Mt Somerset Lane"/>
Address line 2	<input type="text" value="Lower Henlade"/>
Address line 3	<input type="text"/>
Town/City*	<input type="text" value="Tauton"/>
County	<input type="text" value="Somerset"/>
Postcode*	<input type="text" value="TA1 3RC"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>
Website URL	<input type="text" value="www.mountsomersethotel.co.uk"/>
State	<input checked="" type="radio"/> Active - new courses can be created at this venue <input type="radio"/> Retired - new courses cannot be created but users can search for courses at this venue <input type="radio"/> Hidden - cannot create new courses or search for this venue

Figure 129: Edit venue



NOTE

The fields marked with an asterisk are mandatory.

On this page you can edit the name, assign the venue to a region and the usual address fields. The telephone number, email address and the website address are displayed on the course details page. You are able to set the three states of the venue:

Active: new courses can be created with this venue

Retired: new courses cannot be created but users can search for courses with this venue

Hidden: cannot create new course or search for this venue

Click on 'Save changes' when you are done.

4.3.6.1 Setting the venue location

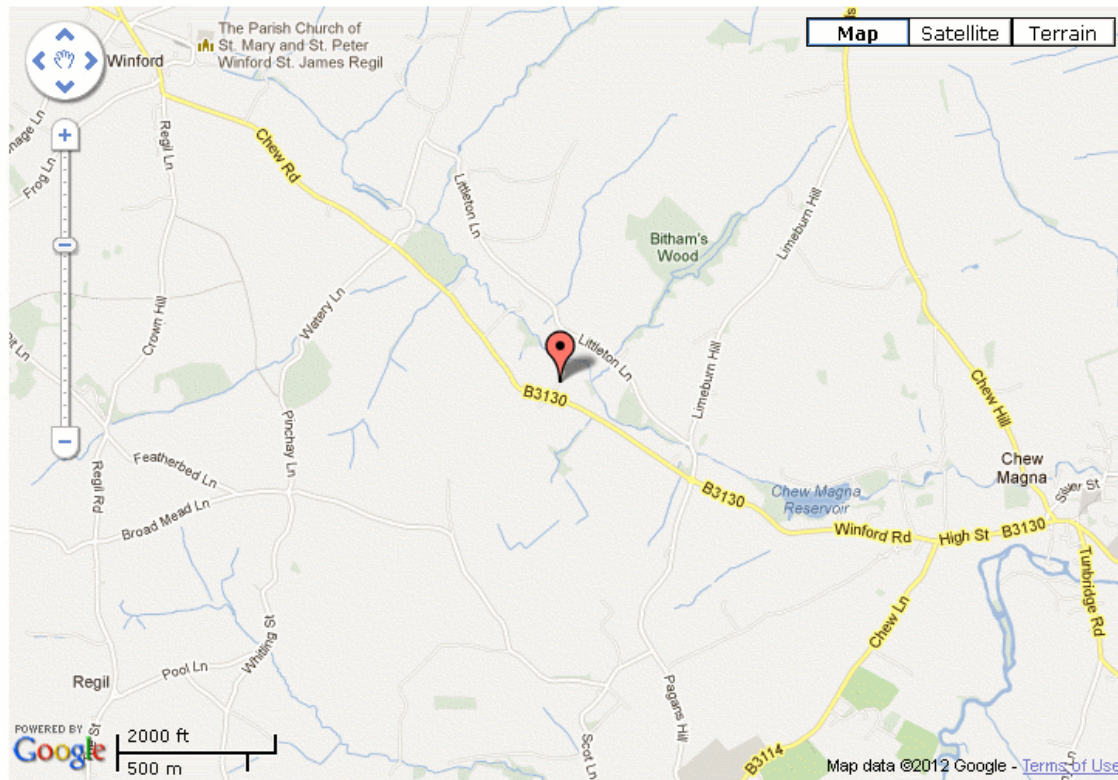


Click on venue location icon to set, update or remove a venue's location, see [Figure 130: Venue set map location](#).

Venue Set Map Location: Mount Somerset Hotel

Address Mt Somerset Lane, Lower Henlade, Tauton, Somerset TA1 3RC

Location Not set



Click on the map to set the venue map location.

Save location

Remove location

Cancel

Figure 130: Venue set map location

Use the navigation controls on the left hand side to locate the venue and then click on the map to set the location - the red marker will be moved to the new location. Click on 'Save location' when you are done or on 'Remove location' to remove the location definition for the venue.

4.3.7 Course Settings



The settings section of Course administration contains a group of functions that are intended to be set once and edited rarely, see [Figure 131: Course settings](#).



NOTE

Only System managers have access to the course settings page.

Course Settings

Default live date

Preferred live day

Default last cancellation

Email reminder

Waiting list Automatically email users on the waiting list when a place becomes available

Default attendee evaluation questions

Number of questions 1

Q1 text

Q1 type with

Additional comments

Comments label

Figure 131: Course settings

4.3.7.1 Default live date

Setting the default live date enables Managers to identify courses which are late in creation (see Manager's *Current issues* on page 66). When a new course is created by an Organiser the new course's Live date is set to this default, the course is then considered late in creation if it has not been approved by this date.

4.3.7.2 Preferred live day

By default, when a Manager is approving a course, the system offers them a choice of leaving the live date the same or to change it to the current date (making the course immediately live). If this option is set a third option given, allowing the live date to be set to the first preferred day of the month.

4.3.7.3 Default last cancellation date

A user booked on the course is able to receive a full refund up to this date; the user is not eligible to get a refund after this time. Information about the last cancellation date for a full refund is available in the 'Terms & conditions' that the user has acknowledged they have read and is available from the 'Basket' page at the beginning of a course booking.

NOTE



It is strongly advised you set this value to something that is reasonable. Too short a time will mean you have less of control over the numbers who actually come on the courses and too long a date will negatively affect the customer experience.

There is also a 'Cooling off' period that is needed after a user purchases a course online. This period is fixed to **SEVEN** days. This is the time that a user must be able to obtain a refund and is needed to safe guard the user under consumer law. The 'Cooling off' period is important when a course is booked

less than seven days before the last cancellation date or if it is booked after the last cancellation date has expired. It is Maxcourse policy that there is no automatic referral for a refund that falls into this category and each user requesting a refund is referred directly to the course provider to accept or deny the request.

4.3.7.4 Email reminder

If set the system will email a short reminder to all users booked on a course the sent time before the course starts. The user must have an email User ID or a contact email address to take advantage of this feature, they can disable course reminders through their 'Preferences' setting, see [Preferences](#) on page 64



NOTE

Course reminders are sent during the night to ensure minimum impact on the system. There is no guarantee that a reminder was successfully sent and received, the course register does flag which users were sent a reminder.

4.3.7.5 Waiting list

If set the system will automatically email all users on the waiting of a course when a spare place becomes available, the user must have an email address as an ID. The system delays the sending out of this email by 10 minutes, allowing the user or administrator who freed the place time to rebook on the course if that is their intension - this reduces the number of 'false alarms'.

4.3.7.6 Default attendee evaluation questions

This is a useful tool to define a limited number of evaluation questions that you want to include by default in all evaluations for your courses.

If you want to have complete flexibility for your course organisers to set their own evaluation questions then do not use this tool.

Add question: You can add questions by clicking the 'Add question' button

Q1 text: Enter the text that will appear as the question text, for example:

- The main objective, ****objective name****, was achieved:
- The venue and catering was:

The ****...**** indicates you need the course organiser to replace the text with the correct value, they are referred to as update markers; a course cannot be approved while a question text contains an update marker.

Q1 type: There are several options here:

1. Yes/no
2. True/false
3. Agree/disagree
4. Strongly agree/disagree
5. Excellent/poor
6. Achieved/not achieved
7. Easy/difficult
8. Assess venue: This is a specific question type that can be used for all venue related questions, enabling the system to generate a venue report

For each question type you can select the number of options you want available to the user. If you do not want them to be able to give a neutral answer then an even number of answer options must be selected.

The 'Move up', 'Move down' and 'Remove' buttons related to each question you create enable it to be moved up and down within the list of questions or removed totally.

Additional comments: Set this to 'Optional' or 'Mandatory' to include a textbox for further comments at the bottom of the evaluation form; an error is returned to the user if this is set to mandatory and they do not supply a comment.

Comments label: Optional text displayed above the Addition comments textbox which can be used to outline information required.

When all the modifications are complete, click the 'Save changes' button.

4.4 User administration



The User administration section gives Managers access to the site's system user resources and settings. It is available under the Manager mode.

When you click on the icon on the main home page you are directed to the 'User administration' page, see *Figure 132: User administration*. You can set:

- Professions
- Subjects
- User info 1 (Main occupations)
- User info 2 (Dietary requirements)
- User info 3
- User info 4
- Settings

NOTE



The User info 1 - 4 are customisable settings, their use is defined during installation. Throughout this manual User info 1 has been customised to store a user's main occupation and User info 2 to store dietary requirements.



Figure 132: User administration

4.4.1 Professions

Please see the course administration section on professions, see caManageProfessionsManage professions.

4.4.2 Subjects

Please see the course administration section on subjects, see ManageSubjectsManage subjects.

4.4.3 User info 1 - 4



The 'User info' options enable users to be identified in a particular way. For example having a category for a user's main occupation or workplace setting would then enable you to do statistical analysis on your user base.



NOTE

The label 'User info 1' will not appear in a true installation and will be replaced to something more applicable to the client, throughout this manual the label 'Main occupation' has been used.

You are taken to the management page for each User info option when you click the corresponding icon. See *Figure 133: Manage user info*. If you have any pre-existing values set you will be able to edit them here, if not you can create a new value.

Name	State
Administrator	Active
Dentist	Active
Doctor	Active
Manager	Active
Receptionist	Active

Figure 133: Manage user info

Clicking 'Create new user info' will start the creation process, see *Figure 134: Create new user info*.

Create New Main Occupation

Name*

Figure 134: Create new user info

After clicking 'Create' the record is created and opens up the edit page, see *Figure 135: Edit user info*.

Edit Main Occupation: Administrator

Name*

State

Active - users can set their main occupation to this value

Retired - users cannot set their main occupation to this value

Figure 135: Edit user info

Name: Change the name here.

State:

Active: users can set this value.

Retired: users cannot set this value.

After making any edits click 'Save changes'.



NOTE

There are up to four user info options. Please repeat the procedures set out above for each user info available on your server.

4.4.4 Settings



The Settings section of User admin contains a group of functions that are intended to be set once and edited rarely.

There are a number of functions contained in this page:

- Booking requirements
- Guest welcome text
- User welcome text
- Organiser welcome text
- Operator welcome text
- Manager welcome text



NOTE

Only System managers have access to the user Settings page.

4.4.4.1 Booking requirements

You can make sure that a user has a certain pre-defined amount of data set before they book on courses. This is a powerful tool to keep you fully informed about the users who book on your courses.

The options available are:

- Date of birth

- Gender
- User info 1 - 4
- Home address
- Work address

4.4.4.2 Welcome text

Guest, User, Organiser, Operator, and Manager welcome text appears on the corresponding home pages of each mode. Although the text appears on different pages the instructions are identical and so will be described here once only. When you click in the text area the formatting options of the CKEditor appear. See *Figure 136: Welcome text*

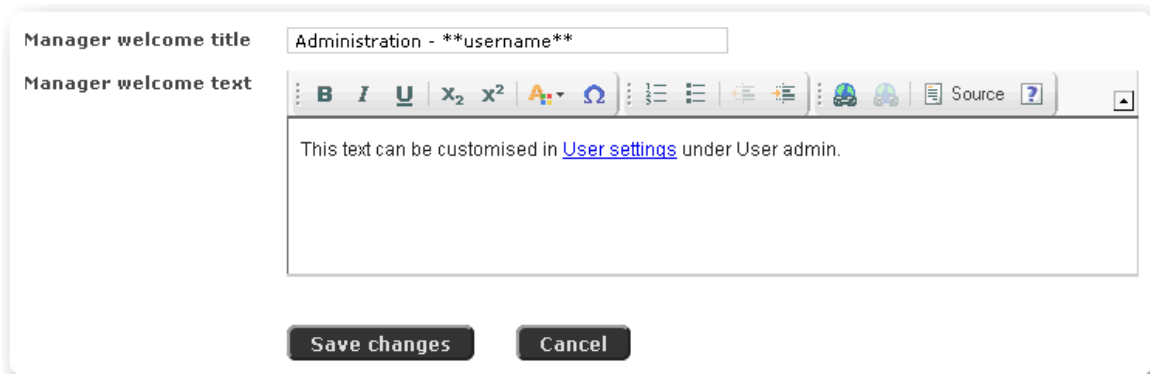


Figure 136: Welcome text



NOTE

The welcome title can be made user specific by including the tag ****username****. Without this tag the title will be generic.

You can format the text by using the Bold, Italic, ordered and unordered list types. You can also include hyperlinks in the heading.



NOTE

You are strongly encouraged not to include hyperlinks to pages outside web sites of your direct control. If you do, include a clause that states you are not responsible for third-party web sites.

When you have finished click the 'Save changes' button.

4.5 System administration



These System admin functions are available to System managers only. They are advanced options and should be used with care, see *Figure 137: System administration*.

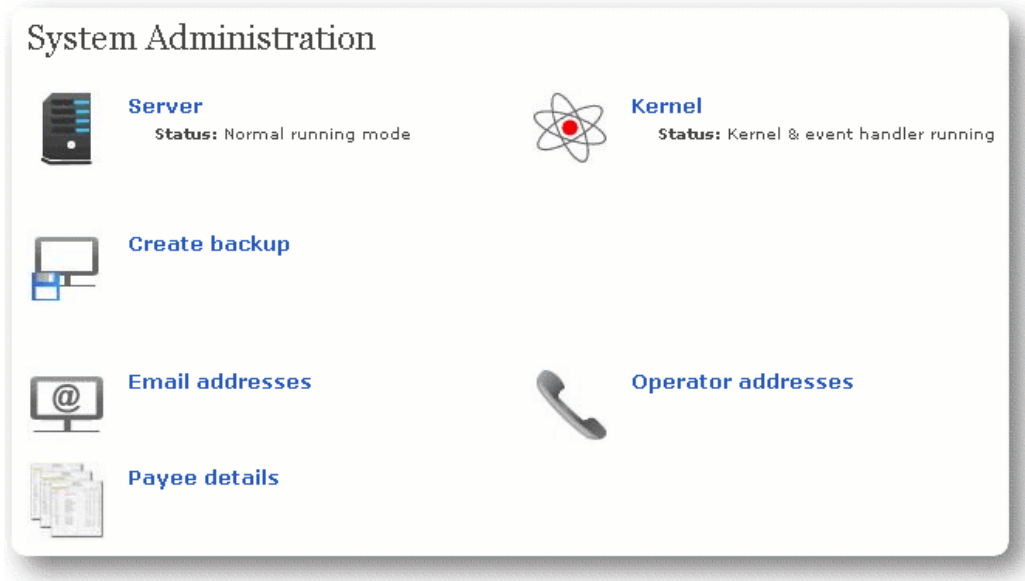


Figure 137: System administration

4.5.1 Server



The server is the computer that holds the Maxcourse software application and your data. This shows the current state of the server.

The server can be in either **Normal running mode** or **Maintenance mode**. There is a link that toggles between the two, see *Figure 138: Server administration*.

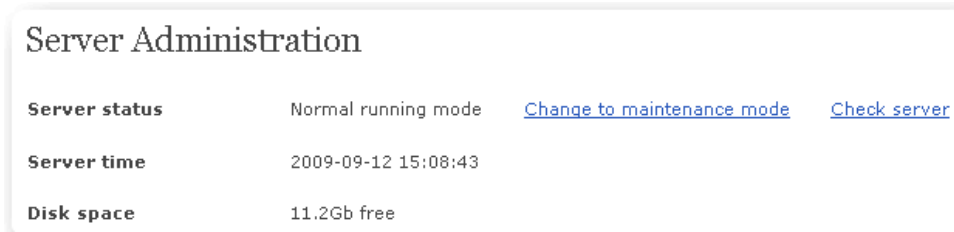


Figure 138: Server administration


Normal running mode: All of the operations of the site are running normally. The site is visible and can be fully used by all users.

Maintenance mode: From time to time the site is updated and maintenance routines are run. In order that the site can be updated it is imperative that nobody who is using the site loses any data or their experience of the site is impaired. Before any updating or maintaining the site is put into 'Maintenance mode' and anyone going to the site will only be able to visit the default home page with a bespoke maintenance message displayed.

To put the site into maintenance mode click the 'Change to maintenance mode' link and you will be able to enter the message that will be displayed for the time the site is in maintenance mode, see *Figure 139: Change to maintenance mode*.

Change to Maintenance Mode

Click the *Confirm* button below to change the server status to **Maintenance** mode.

 Current users of the Maxcourse server may lose work when the server is put into maintenance mode. The server can only be used by system managers.

Message

Confirm

Cancel

Figure 139: Change to maintenance mode

Once you have clicked the 'Confirm' button the site is in maintenance mode. The next screenshot shows the text that is displayed to users coming to the site while in maintenance mode, the message input was 'The site is being updated. Please return shortly to access the site', see [Figure 140: Maintenance mode](#).

Maintenance Mode

The Maxcourse Demo online course booking system is currently down for maintenance:

The site is being upgraded.

We apologise for any inconvenience caused. If you continue to see this message then please contact Maxcourse Demo Online Course Administration, telephone +44 (0)1275 331 901.

Figure 140: Maintenance mode



NOTE

When the site is in 'Maintenance mode' only System managers can log in to the site.

When maintenance or updating is complete the site can be put back into 'Normal running mode' by clicking the 'Change to normal running mode' link. Users can now use the site as before.



WARNING

Maintenance mode has a profound effect on the access to the site. Only experienced System managers should use this function.

4.5.1.1 Server time

This shows the current time of the server. Although the server resides in the UK and has daylight saving enabled it is important from time to time to check the date and time to make sure it is correct. This information is just for reference and no actions are associated with it.

4.5.1.2 Disk space

This shows the available disk space. This information is just for reference and no actions are associated with it.

4.5.2 Kernel



The kernel is a separate installed application that hides behind Maxcourse that helps control functions and processes certain files, see *Figure 141: Kernel administration*.

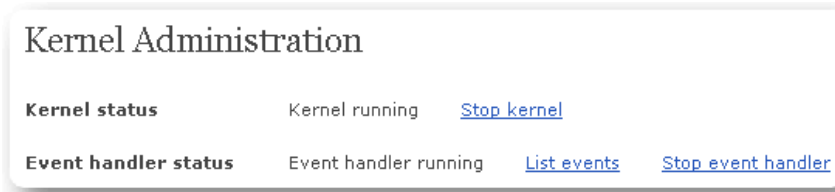


Figure 141: Kernel administration

WARNING



Under no circumstances should anything in this section be changed without fully understanding the implications of the changes. You should only change these settings under a direct request from a Maxcourse support.

It is outside the remit of this manual to describe the functions of this section of the site. Under certain circumstances Maxcourse can deliver precise training on the use of this section. If you need assistance please speak directly to Maxcourse.

4.5.3 Create system backup



Although the system is a live site that is constantly evolving it is important to regularly back up your data. This is done automatically on a day to day basis. However, if you are planning on putting the server into maintenance mode it is advised that a backup is created, see *Figure 142: Create system backup*.



Figure 142: Create system backup

A backup is created with a Long date stamp such as '2009-05-26 20:51:36' to mean 26th May 2009 at 20:51:36. You have the ability to add a comment.

Optional comment: Add a comment to further define your backup.



NOTE

Only Maxcourse support are able to restore a backup.

4.5.4 Email addresses



There are a number of system email addresses that need to be configured to allow the correct functioning of the site. See *Figure 143: System email addresses*.

System Email Addresses

No-reply*

Contact*

Course contact
 Always use course contact email address
If disabled the email ID of the admin user sending the course email will be used where possible

Lecturer admin*

Profession admin*

Subject admin*

Venue admin*

Figure 143: System email addresses

All of the system emails except Course contact need to have a valid email address assigned to them.

No-reply: All emails sent by the system are created with this as its from address, this should be an unmonitored account. Care must be taken when setting up this email account; if an email is sent to it it should auto-respond with a warning that the email will not be read, however it is important that it only responds once per user per day to avoid potential cycles.

Contact: Messages created via the main Maxcourse Contact page are sent to this email address.

Course contact: If course contact is set to a valid email address, this email address will be used as the Reply-to address for any email sent to users in relation to a course, e.g. notification of the course being cancel. If 'Always use course contact email address' is enabled the contact email address will always be used, if not the organiser's ID will be used if it is an email.

Lecturer admin , Profession admin, Subject admin, Venue admin: When an organiser requests a new course resource their request is sent to the appropriate email address.

After making any edits click 'Save changes'.

4.5.5 Operator addresses



This is an IP address list of all computers authorised to allow operator checkouts using 'Online payment'. Restricting operator based online checkouts to well maintained computers is a base requirement of PCI compliance. See *Figure 144: Manage operator addresses*.

Manage Operator Addresses - 1 operator address

[Create new operator address](#)

IP address	State
89.206.179.233	Active

Figure 144: Manage operator addresses

All of the computers used by operators should to be fully checked for viruses and properly maintained before adding to this list. An operator's IP address is documented on the Operator's Checkout page if it is not in the current authorised list.

4.5.6 Payee details



This section configures the online and cheque payment details, editing these settings do not effect any existing transactions, only future ones. See [Figure 145: Manage payee details](#), the options available depend on the payment methods enabled on your system.

System Payee Details

Online payee name*	<input type="text" value="Maxinity Software"/>
Cheque payee name*	<input type="text" value="Maxinity Software Ltd"/>
Send cheque to	<input type="text" value="Maxcourse Administrator"/>
Address line 1*	<input type="text" value="Unit 4G, Winford Business Park"/>
Address line 2	<input type="text" value="Littleton Mills"/>
Address line 3	<input type="text" value="Winford"/>
Town/City*	<input type="text" value="Bristol"/>
County	<input type="text"/>
Postcode*	<input type="text" value="BS40 8HJ"/>
VAT Rate (%)	<input type="text" value="20"/>
VAT Number	<input type="text"/>

Users are only given a full VAT receipt if the VAT Rate is greater than 0% AND the VAT Number is set

Figure 145: Manage payee details

Online payee name: This must be set to the name that will appear on users' bank statements when they make an online payment.

Cheque payee name: This must be set to the payee name users should write on an cheque payment.


Send cheque to and **Address:** Postal details for any cheque payment.

VAT Rate (%): Set to the current VAT rate, the system calculates the VAT payable on every course booking.

VAT Number: If set and the VAT Rate is greater than zero, users will be given a full VAT receipt with every booking transaction, detailing the VAT paid and this VAT registration number.

After making any edits clicking on 'Save changes' will take you to an edit confirmation page, see [Figure 146: Manage payee details - confirm](#).

System Payee Details - Confirm

 When changing the VAT rate either the Gross charge of every course must be changed or the Net price must be changed. Please check the following changes to system payee details and then click on *Change Gross* to accept the changes and adjust the Gross charge or click on *Change Net* to accept the changes and adjust the Net price:

VAT Rate 17.5%

Change Gross

Change Net

Cancel

Figure 146: Manage payee details - confirm

If the VAT rate is changed you are given two options on how this change should affect existing course which have not yet taken place, completed courses are not altered.

Change Gross: The system alters the charge for every course such that its net charge is maintained, for example if the rate was changed from 10% to 20%, a £10.00 charge would be altered to £10.91 to maintain its net charge of £9.09.

Change Net: The system does not alter any course charge so the net charge is effectively altered, for example if the rate was changed from 10% to 20%, a £10.00 charge would remain the same but the net charge would therefore be reduced from £9.09 to £8.33.



WARNING

Any confirmed edits take immediate effect, any transactions made with the current settings cannot be altered so care must be taken to ensure any alterations are correct.

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