

Familiarisation Guide



Day to Day

1. Preparation

- o Creating account for testing.
- o Creating users for testing.
- o Creating trainer for testing.
- o Creating courses for testing.

To test your system and your processes without the risk of sending emails to your real users, please create the following:

1a. Account

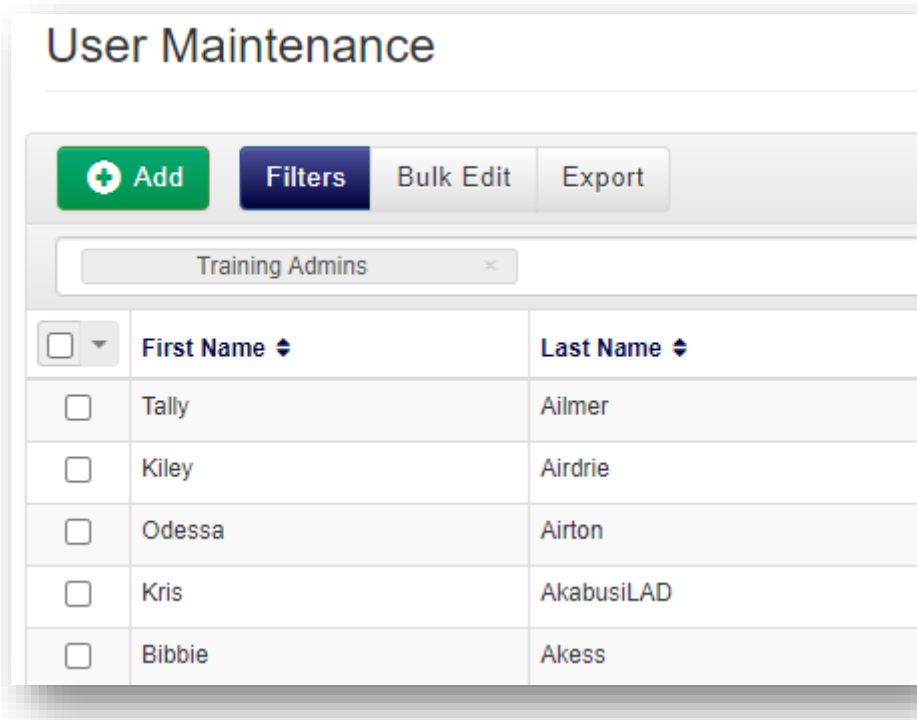
Access your system > Open the Accounts page > click 'Add'

| <input type="checkbox"/> | Account Name ▲ | Town ⇅ |
|--------------------------|----------------|--------|
| <input type="checkbox"/> | Babbleopia | |
| <input type="checkbox"/> | Babbleset | |
| <input type="checkbox"/> | Babblestorm | |
| <input type="checkbox"/> | baccount | |
| <input type="checkbox"/> | Blognation | |
| <input type="checkbox"/> | Blogpad | |

Create a new account labelled 'Test' and assign it to any account group, you do not need to apply any contact or address details.

1b. Users

Access your system > Open the Users page > click 'Add'



Create a new user called 'Booked User', with the email address of bookinguser@test.com and add them into the account 'Test' with the role of 'Individual'

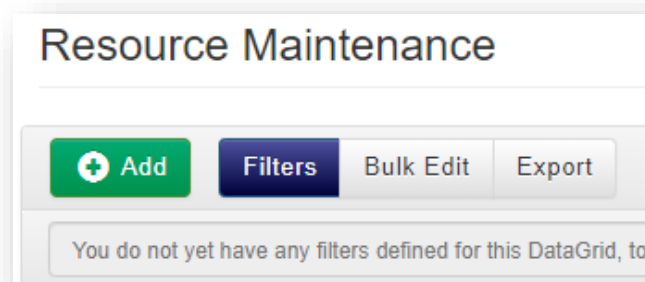
Repeat this process for the following test users:

| Name | Email Address |
|----------------|--|
| Transfer User | transferreduser@test.com |
| Cancelled User | cancelleduser@test.com |
| New User | newuser@test.com |

Create a new user called 'Manager User', with the email address of manageruser@test.com and add them into the account 'Test' with the role of 'Customer Manager'

1c. Trainer

Access your system > Open the Resources 'Manage' page > click 'Add'

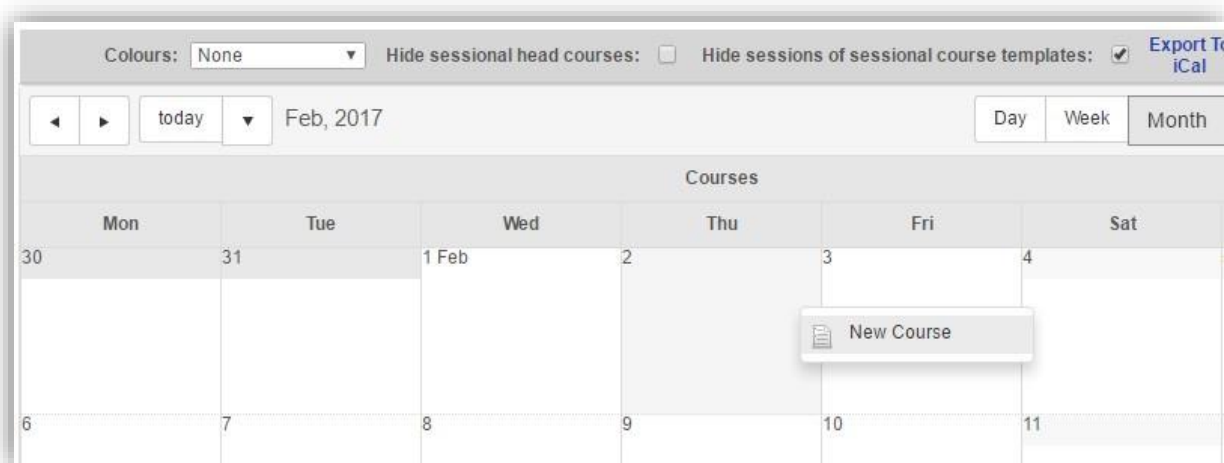




Create a new External Trainer resource with the label 'Test Trainer', provide the trainer with a name and the email address of trainer@test.com and provide them with full access to the My Teaching menu options

1d. Courses

Access your system > Open the Courses 'Calendar' page > right click on a date in the calendar and click 'New Course'














Create the new course selecting any course template set the cost to £0, then select 'Test Trainer' as your course's trainer, select any venue

Repeat this process and schedule a course on the following day using the same course template and the same trainer


2. Booking Process

Access your system > Open the Courses 'Calendar' page > right click on the first date that you have scheduled in the calendar and select 'Add to basket'



-  Edit
-  Preview
-  Delegates
-  Course Booker
-  Document Generator
-  File Store
-  Export to iCal
-  Manage Elements
-  Notes
-  Tasks
-  Add To Basket

On the first stage of the shopping basket select to book **3** delegates

| Order Summary | | | | |
|---|---|--------------|------------|----------------------|
| 1 Item | | | | |
| | | Qty / Places | Unit Price | Total |
|  | Course A Date: 31/03/2021 08:00 - 16:00 Remove | 1 | £10.00 | £10.00 |
| | | | | Net: £10.00 |
| | | | | Tax: £2.00 |
| | | | | Total: £12.00 |



Click 'Select Booker' and select the **Manager User** as the booking user

Delegates

Booker
Your selected booker will receive the booking confirmation email, this selection also affects the bill to options in the payment stage.

Select Booker

Jamie Butterworth

Course A

Select Delegates

Select Delegate

Continue to Payment

One the third stage of the shopping basket select the following users as delegates

- Booking User
- Transfer User
- Cancelled User

Candidates

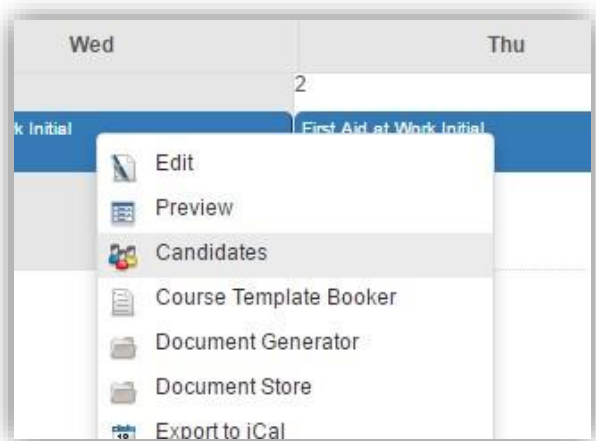
| Title | Location | Date | Candidates | Cost |
|---|----------|---------------------|------------|-------|
| First Aid at Work Initial course details | | 01/03/2017 09:00:00 | 3 | |
| Add candidate + Add myself + | | | | Total |

Complete the booking

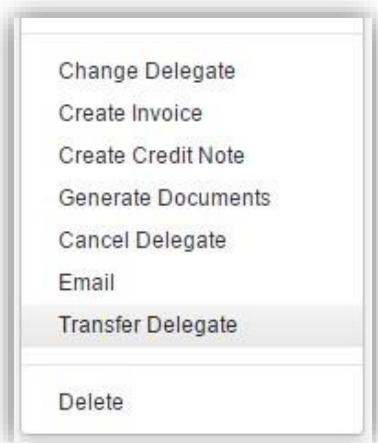
3. Delegate Management

3a. Transfer a delegate to another course

Access your system > Open the Courses 'Calendar' page > right click on the first date that you have scheduled in the calendar and select 'Candidates'



Right click on Transfer User and click on 'Transfer Delegate'



In the Transfer Delegate window select the transferred to date as the other course you scheduled in 1d



Transfer Delegate

Original Course Template

First Aid at Work Initial: 01/03/2017 09:00 - 17:00

Cost

0.00

Options

Candidate *

Transfer User x Select

Course Template *

First Aid at Work Initial: 02/03/2017 09:00 - 17:00 x Select

Copy Source Notes

Return to the Courses 'Calendar' page > right click on the first date that you have scheduled in the calendar and select 'Candidates'

Your delegate should now have the status of 'Transferred' on the first course

| Course Template or Alias Name | Start Date | End Date | Status | |
|-------------------------------|------------------|------------------|-------------|---|
| First Aid at Work Initial | 01/03/2017 09:00 | 01/03/2017 17:00 | Transferred | ▼ |

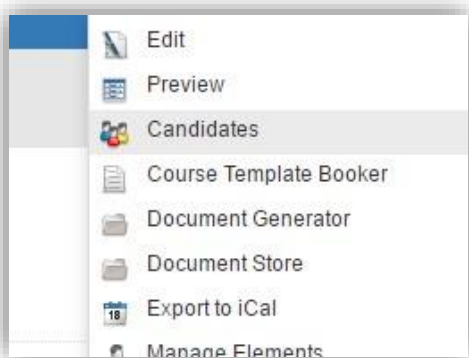
Return to the Courses 'Calendar' page > right click on the second date that you have scheduled in the calendar and select 'Candidates'

Your delegate should now have the status of 'Booked' on the second course

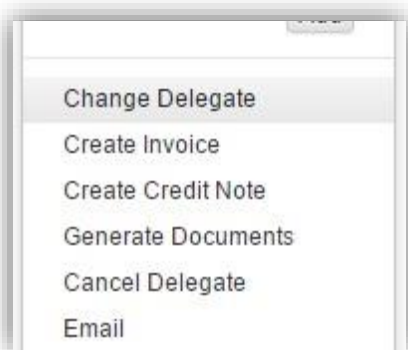
| Course Template or Alias Name | Start Date | End Date | Status | |
|-------------------------------|------------------|------------------|--------|---|
| First Aid at Work Initial | 02/03/2017 09:00 | 02/03/2017 17:00 | Booked | ▼ |

3b. Change a delegate to another user

Access your system > Open the Courses 'Calendar' page > right click on the **second** date that you have scheduled in the calendar and select 'Candidates'



Right click on Transfer User and click on 'Change Delegate'



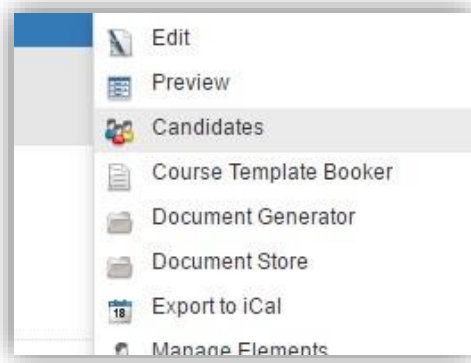
Select 'New User' as the replacement delegate



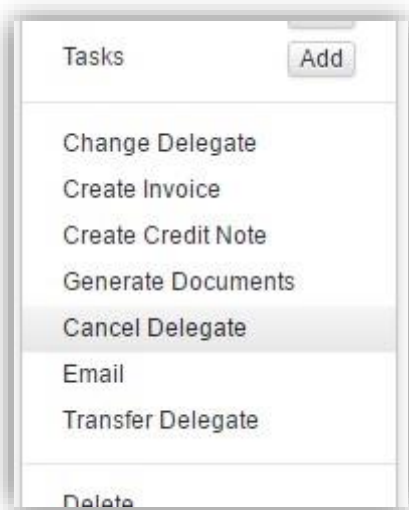
Save and close

3c. Cancel a delegate

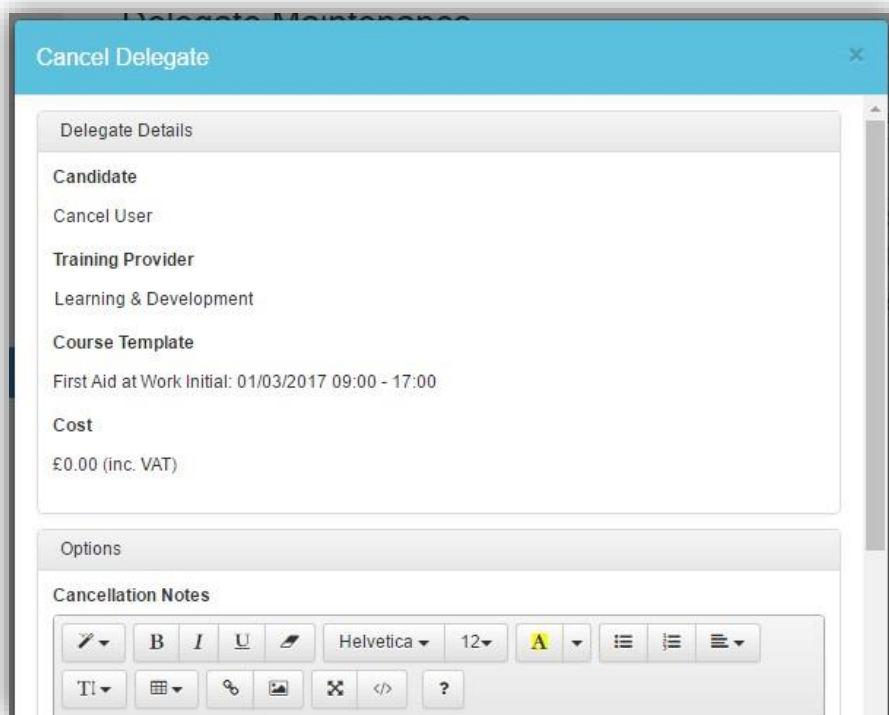
Access your system > Open the Courses 'Calendar' page > right click on the first date that you have scheduled in the calendar and select 'Candidates'



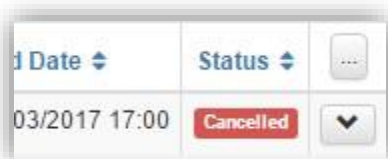
Right click on 'Cancel User' and click on 'Cancel Delegate'



Add any applicable cancellation notes and confirm the cancel

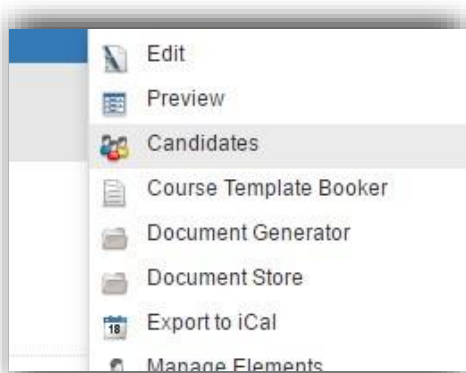


Your delegate should now have the status of 'Cancelled' on the course



4. Document Generation

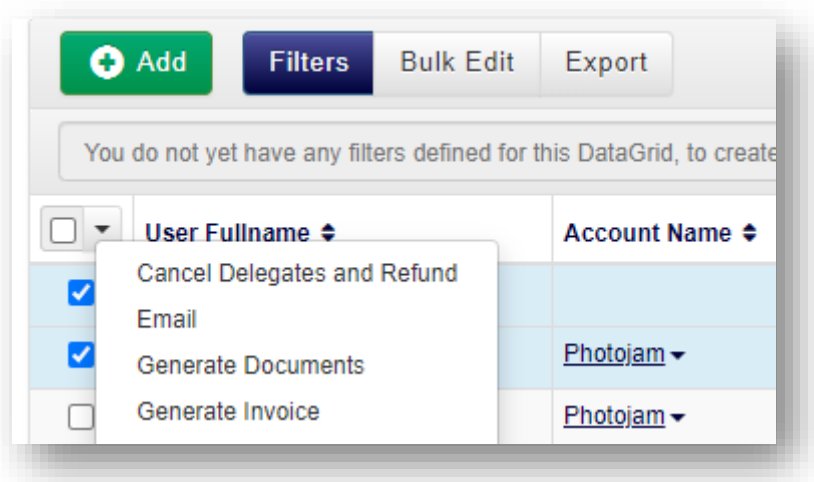
Access your system > Open the Courses 'Calendar' page > right click on the **first** date that you have scheduled in the calendar and select 'Candidates'



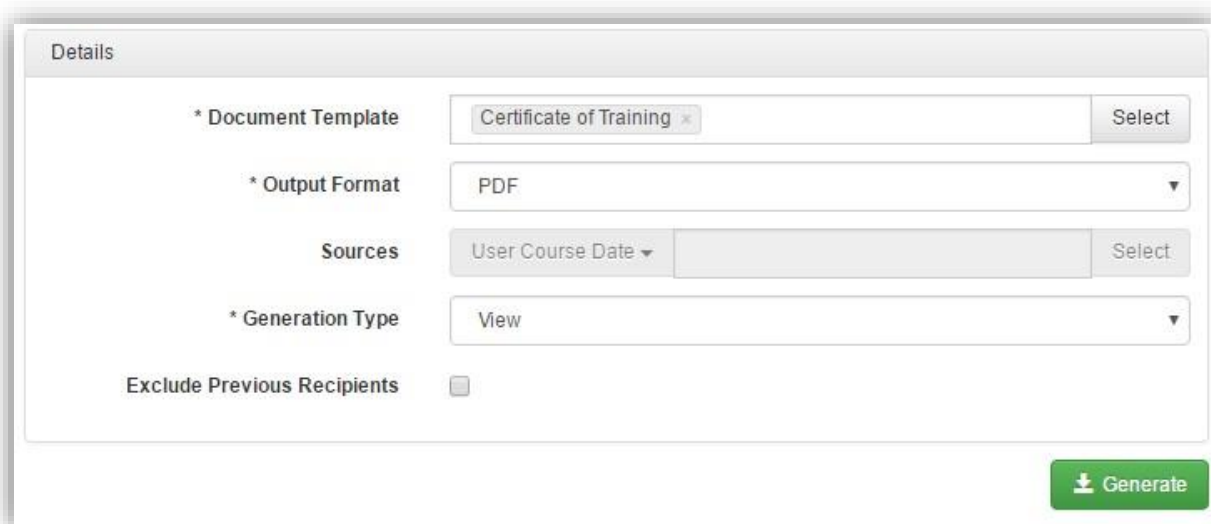
Select 'Booking User' delegate



Click on the multi-select options drop down button, click on 'Generate Documents'

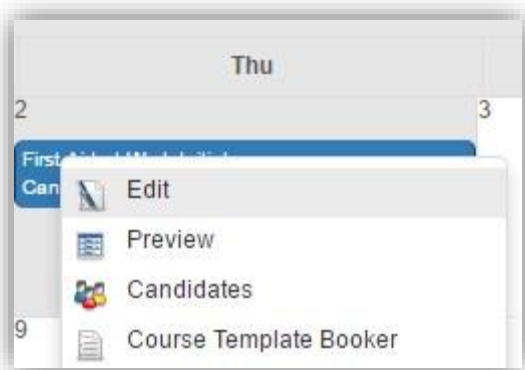


Select each document template in turn and View these being generated to ensure your documents are working as expected



5. Course Cancellation

Access your system > Open the Courses 'Calendar' page > right click on the **second** date that you have scheduled in the calendar and select 'Edit'



Scroll down to the scheduling settings and change the course status from Available to Cancelled

Scheduling

Start Date *
02/03/2017 09:00

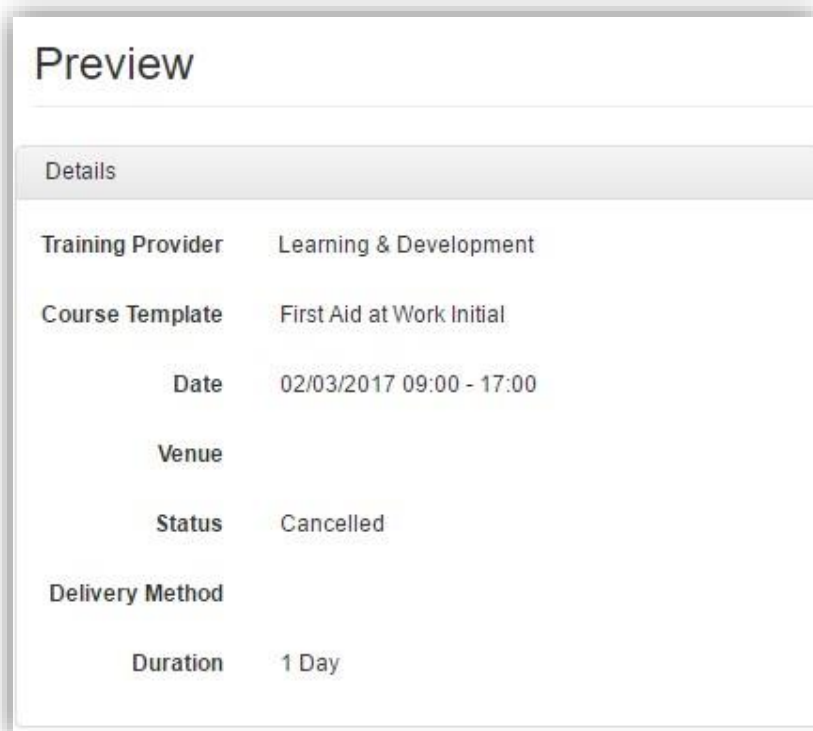
End Date *
02/03/2017 17:00

Duration
1

Duration Type
Day

Status *
Available
Cancelled
Completed
FullyBooked
InProgress
Available
OnHold
Failed
Provisional

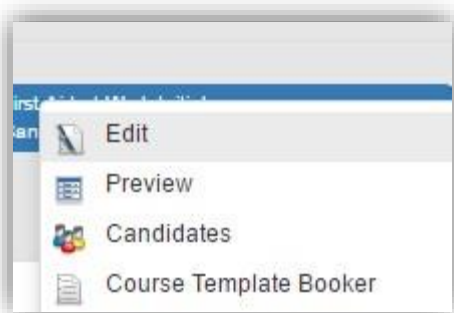
Return to the Courses 'Calendar' page > right click on the **second** date that you have scheduled in the calendar and select 'Preview'



The course status will now be cancelled

6. Course Completion

Access your system > Open the Courses 'Calendar' page > right click on the **first** date that you have scheduled in the calendar and select 'Edit'



Scroll down to the scheduling settings and change the course status from Available to Completed



Scheduling

* Start Date 01/03/2017 09:00

* End Date 01/03/2017 17:00

Duration 1

Duration Type Day

* Status Available

Delivery Method

Number of Places

Maximum Places

- Cancelled
- Completed**
- FullyBooked
- InProgress
- Available
- OnHold
- Failed
- Provisional

Access the list of delegates for the course date

Details

Attributes

Text

Exclusivity

Delegates

Placeholders

Change Booking User's status to completed by clicking on 'Bulk Edit'

Select the status field and select the status of completed, click Save

+ Add Filters **Bulk Edit** Export Search Q

Status

Completed

- +

Cancel Save



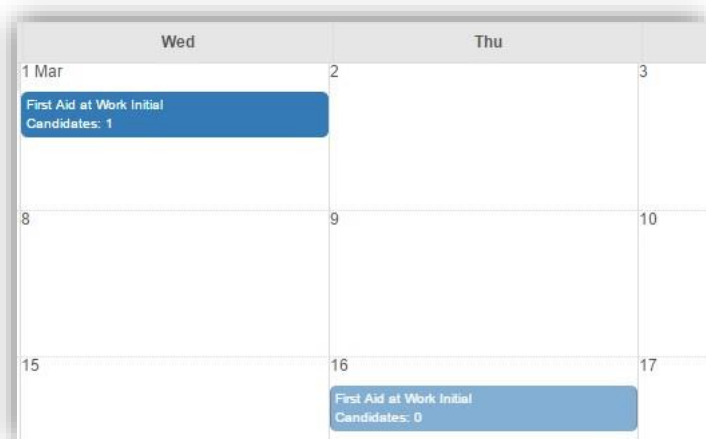
Checking Communications

Within the communications page of your system you would expect to see the following communications, subject to the communications defined during your implementation:

- Booking Confirmations to Booking User, Transfer User & Cancelled User for course one.
- Transfer Confirmation to Transfer User for course one.
- Booking Confirmation to Transfer User for course two.
- Booking Confirmation to New User for course two.
- Cancellation Confirmation to Cancelled Candidate for course one.
- Course Cancelled Notification to New User for course two.
- Course Completed Notification to Booking User for course one.

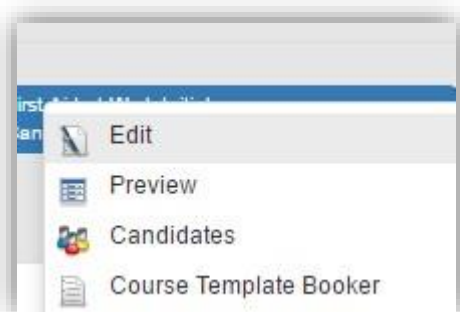
7. Moving a course

Access your system > Open the Courses 'Calendar' page > click on a course date to move it and drag it to another date in the calendar.



8. Changing a trainer / venue on a course

Access your system > Open the Courses 'Calendar' page > right click on any course that you have scheduled in the calendar and select 'Edit'



Scroll down to the Resources section and click 'Select' to change the Trainer and/or Venue



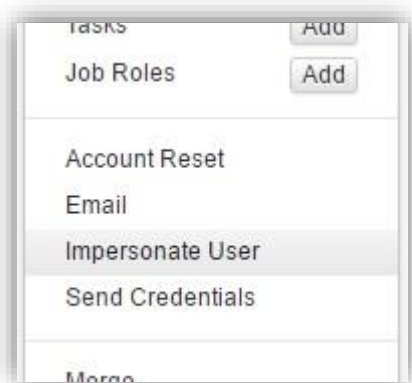
The screenshot shows a form with the following sections:

- Resources**: A header section.
- Trainers**: A section with an input field and a "Select" button.
- Venue**: A section with an input field and a "Select" button.
- Financial**: A header section at the bottom.

Scroll to the bottom of the page and click Save

9. Logging in as a trainer

Access your system > Open the Users page > search for Test Trainer > Right click on Test Trainer and click 'Impersonate User'



Once logged in access My Account > My Teaching page to view their courses as a trainer

10. Logging in as a manager

Access your system > Open the Users page > search for Manager User Right click on Manager User and click 'Impersonate User'



11. Logging in as a learner

Access your system > Open the Users page > search for Booking User Right click on Booking User and click 'Impersonate User'

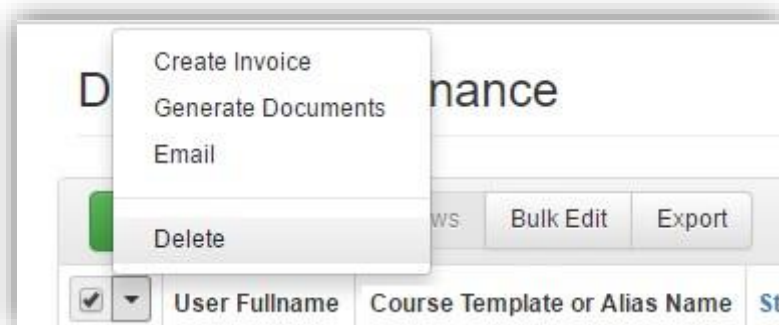


Removing Test Data

Deleting Delegates & Courses

Access your system > Open the Courses 'Calendar' page > right click on either course that you have scheduled in the calendar and select 'Candidates'

Select all delegates listed on the course and Delete them



Repeat this for the other scheduled course in the calendar



Access your system > Open the Courses 'Class' page > right click on either course and click 'Delete'



Repeat this for the other scheduled course

Deleting Trainer

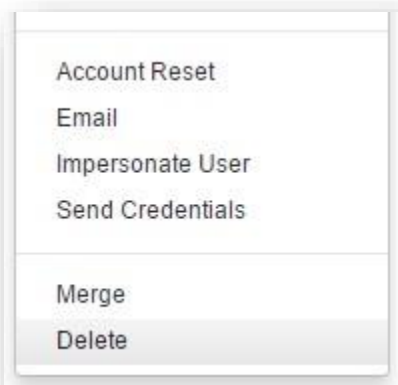
Access your system > Resources 'Manage' > search for Test Trainer Right click on Test Trainer and click 'Delete'



Deleting Users & Account

Access your system > Users > search for 'Booked User'

Right click on Booked User and click 'Delete'



Repeat this for

- Transfer User
- Cancelled User
- New User
- Manager User

Access your system > Accounts > search for 'Test'

Right click on Test and click 'Delete'

