

Learning Management System

Delegate User Manual



Contents

Contents	1
Introduction	1
Conventions used in this document	1
Objectives.....	1
How to register	2
Your Details	3
Login Details.....	4
Logging In	5
Logging out	6
Pages	6
Your History & Bookings	6
Active Bookings	7
History	7
Your Invoices	8
Your Account.....	8
Changing your password.....	9
Events & Courses	10
Navigation bar	10
Terms and Conditions	10
Finding an event	11
Events List	11
See other dates	11
Upcoming occurrences notifications	12
Searching by venue or by category	13
Searching by date.....	13
Booking onto an event	14
Cancel a booking	16
Attending an event	16
QR Codes.....	16
Delegate Managers	17
What is a delegate manager and how do you become one?	17
Adding a delegate	18





Managing a Delegate	19
Booking your delegates.....	20
Document Control.....	21
Document information	21
Revision history.....	21

Introduction

The Learning Management System has been created to enhance your ability to book onto courses simply and efficiently. This manual has been written for the delegates to assist them with booking the courses and or events

Conventions used in this document

This manual uses icons to illustrate comments with the following purposes.

-  **Warning**
-  **Best Practice**
-  **Useful tips**
-  **Navigate to**

[***] Key from PC Keyboard for example, press [Tab]

Objectives

This manual is designed to help you manage this system. It will cover:

- > How to register
- > How to log in and out
- > Navigating around the different pages of the site
- > Finding an event
- > Booking onto an event
- > Cancelling a booking
- > This system is not compatible with Internet Explorer 7 (IE7) or below

How to register

The screenshot shows the Phew! Learning Management System interface. At the top right, there are 'Login' and 'Register' buttons. The main navigation bar includes 'Events & Courses', 'Our Work', 'What We Do', and 'Why Us'. The 'Events & Courses' section is active, displaying a list of events. An example event is shown: 'Example Event' on 'SUNDAY 20 OCTOBER 2019 (12 - 12)'. The venue is 'Phew - The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS'. The number of places available is 0, and the cost is 'Please login or register for costings'. A 'More Information & Booking' button is present. To the right, there are filters for 'By Venue' and 'By Category', both set to 'Select Venue' and 'Select Category' respectively. Below these is a calendar for August 2019, with the 16th and 17th highlighted. At the bottom, there are 'Login', 'Register', and 'Terms & Conditions' buttons, along with contact information: Address: Building 115 Bedford Technology Park MK44 2YA, Call: 01234 779 050, Email: support@phew.org.uk. The footer states 'Learning Management System designed by Phew'.

If you have not used the site before and have not been set up by an Administrator.

Click the **Register** button to set an account up.



You will be taken to the registration page which will have a series of fields for you to complete.

Your Details

Your Details

First Name *

Last Name *

Your Role/Job Title *

Your Organisation *

What best describes your organisation * -- Please Select --

Phone Number *

Mobile

Address *

Dietary Requirements:

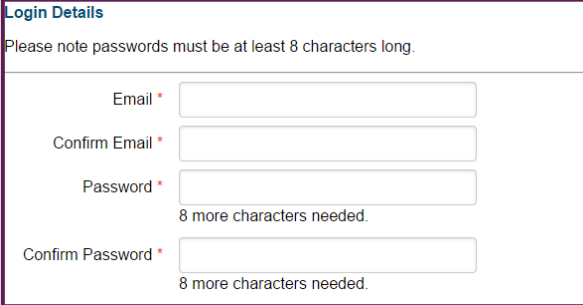
Disabilities to be aware of

- **First Name:** your first name
 - **Surname:** your surname
 - **Your Role/Job Title:** your job title
 - **Your Organisation:** the name of the organisation you work for
 - **What best describes your organisation:** this is a dropdown of the current **Organisation Types** set up – these are representative of the different sectors. Select which one your organisation best suits.
 - **Phone Number:** your phone number
 - **Mobile:** your mobile number
 - **Address:** your address
- ✓ This can be your organisation's address
- **Dietary Requirements:** if you have any dietary requirements please enter them here. e.g. vegan or gluten free.

 This feature may not be an option on all systems.

- **Disabilities to be aware of:** if you have any disabilities that the event organisers need to be aware of or that need to be accommodated, please enter them here.

Login Details



Login Details

Please note passwords must be at least 8 characters long.

Email *

Confirm Email *

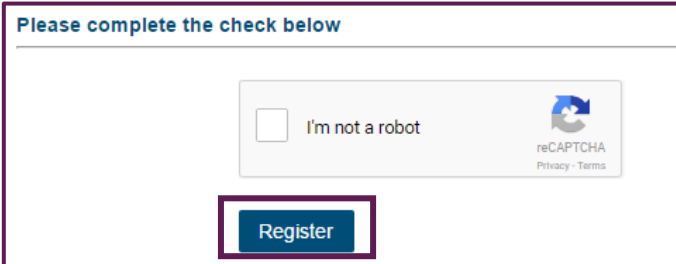
Password *
8 more characters needed.

Confirm Password *
8 more characters needed.

- **Email:** enter the email address that you would like to be associated with this account. You will need to use this to log in.
- **Confirm Email:** confirm the email entered above.
- **Password:** enter your password you would like to use for this account. You will need to enter this each time you log in.
- **Confirm Password:** confirm the password entered above.
- **Check box:** simply tick the box to confirm you are not a robot (spam). You must wait until the green tick has appeared in place of the white tick box before continuing.

 Not all systems will have been set up with this check.

Once all the fields have been completed click the blue **Register** button underneath the spam box.



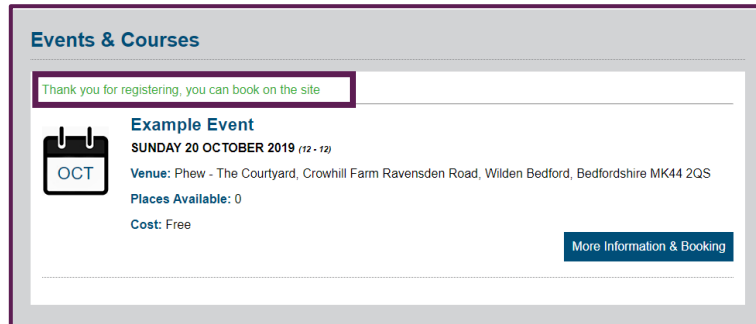
Please complete the check below

I'm not a robot

reCAPTCHA
Privacy - Terms

Register

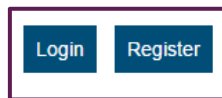
Once registered, you will be directed back to the **Events & Courses** page and a green message will appear confirming your registration.



Logging In

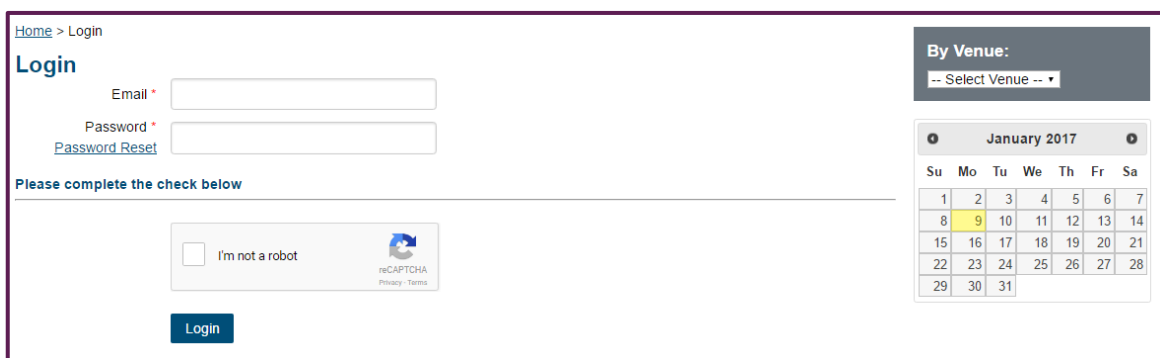
Go to the relevant Board's Events and Courses website or page.

At the top on the right-hand-side you will see two buttons, one labelled **Login** and one **Register**.



To login, simply click the **Login** button.

You will be taken to a new page where you will be prompted to enter your email address and password that you registered with.



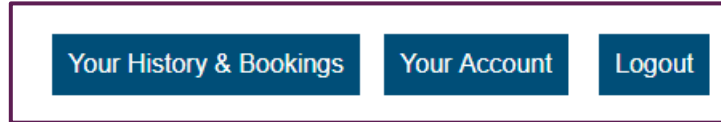
Once you have entered these details, you will need to tick the box to confirm you are not a robot (spam).

 **Not all systems will have been set up with this check.**

You must wait until the green tick has appeared in place of the white tick box before continuing.

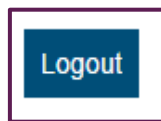
Once all the fields have been completed click the blue **Login** button underneath the spam box.

Logging out

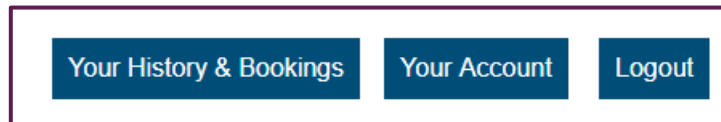


In the top right-hand side of the screen buttons you will see the **Logout** button. Alternatively, at the bottom left next to the terms and conditions button.

If you would like to logout of the system at any time simply click either of these buttons.



Pages



At the top right of the screen you will see three buttons directing you to different pages on the site.

Your History & Bookings

This is where you will find all the information relating to bookings you have made for past and future events. If you are new to the system and have not yet booked on to anything this page will simply say **You currently have no booking history.**

A screenshot of the "Your History & Bookings" page. It shows a breadcrumb trail "Home > Your History & Bookings", the page title "Your History & Bookings", a welcome message, and a message stating "You currently have no booking history." Below this is a section titled "Your Payment History" with a table header containing columns: Event, Amount, Reference, Date, Refunded, Refund Amount, Refund Comment, and Receipts.

[Home](#) > Your History & Bookings

Your History & Bookings

Welcome to your History & Bookings area where you can review and manage your past and current bookings with us.

You currently have no booking history.

Your Payment History

Event	Amount	Reference	Date	Refunded	Refund Amount	Refund Comment	Receipts
-------	--------	-----------	------	----------	---------------	----------------	----------

Active Bookings

You are now booked.

Active Bookings

Information	Cancelled	Cancel	Actions
How to create a Project in Asana Phew - The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS 23-08-2019 (9:30 - 12:30)	No	Cancel	

This will give you an overview of all the upcoming events that you are currently booked on to.

- **Information:** you will see the event title, location, date and time.
- **Cancelled:** there will be either **Yes or No** depending on whether you have cancelled this booking or not.
- **Cancel:** option to cancel it if you haven't already done so and providing you are still within the cancellation time period.
- **Actions:** there are different actions that can be required such as:
 - Complete an evaluation.
 - Download your certificate.
 - On occasion there may be a further evaluation.

History

Event History

Information	Attended	Cancelled	Certificate
-------------	----------	-----------	-------------

This table shows all bookings you have made for past events.

- **Information:** you will see the event title, location, date and time.
- **Attended:** there will be a **Yes or No** regarding whether you have attended this event or not.
- **Cancelled:** there will be a **Yes or No** regarding whether you cancelled this booking or not.
- **Certificate:** there will be a link to access your certificate (if applicable).

Your Invoices

The last table on this page details all your invoices.

Your Invoices							
Event	Amount	Reference	Date	Refunded	Refund Amount	Refund Comment	Invoice
							↓

- **Event:** will give the event title, location and date.
- **Amount:** will show the cost to attend the event.
- **Reference:** will be the event payment reference.
- **Date:** is the invoice date.
- **Refunded:** will show a **Yes or No** answer as to whether you have been refunded or not.
- **Refund Amount:** will show the amount in pounds you have been refunded (if applicable).
- **Refund Comment:** shows the comment given regarding the refund (if applicable).
- **Invoice:** will show an arrow icon that you can click on to download your invoice.

Your Account

This page shows all your details as they were displayed when you registered. If you need to make any changes to your personal information.

Disabilities:

 Click the grey Update button at the bottom of the page to save any changes.

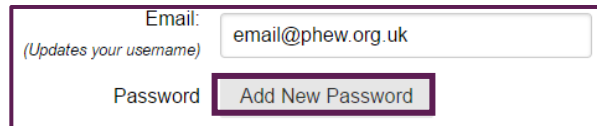
Review Your Notifications

You will be notified via email when the conditions below are met. You can unsubscribe from any of these notifications by clicking the relevant link included at the bottom of these emails.

This section also allows you to view any notifications setup by you or on your behalf by the website, such as for upcoming event occurrences.


Changing your password

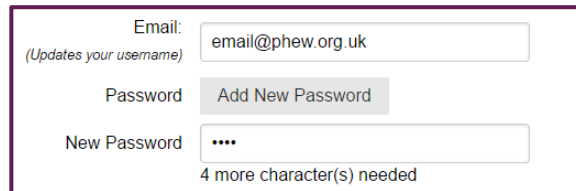
To change your password, click the grey **Add New Password** button shown underneath your email address details on the **Your Details** page.



The screenshot shows a form with two rows. The first row is labeled 'Email:' and contains a text input field with the value 'email@pew.org.uk'. Below the label is the text '(Updates your username)'. The second row is labeled 'Password' and contains a grey button with the text 'Add New Password'.

Once you click the button, a new field labelled **New Password** will appear below. Enter your new password here.

 **If your character is not long enough to meet security requirements, a text notice will appear under the field to tell you how many more characters you need to enter.**



The screenshot shows the same form as before, but with an additional row. The third row is labeled 'New Password' and contains a text input field with four dots '....'. Below the field is the text '4 more character(s) needed'.

Once you have entered a suitable password, click the grey **Add New Password** button again and the changes will be saved.

Events & Courses

Here you will see a list of all upcoming events and courses, along with search functionalities and a link to find out more information and book on for each course. This will be covered in further detail later in the manual.

Home > Events & Courses

To use this booking system, you will first need to create a user account and once you have done this, you will be able to manage your own bookings, access course evaluations, certificates and access your training history.

Please note: Individuals must create their own account. There is no facility for one person to create an account in their name and book places for numerous numbers of staff.

Events & Courses

Example Event
WEDNESDAY 1 NOVEMBER 2017 (9AM - 5PM)
 Venue: Phew - The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS
 Places Available: 99

[More Information & Booking](#)

Example Event
FRIDAY 1 DECEMBER 2017 (9AM - 5PM)
 Venue: Phew - The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS
 Places Available: 99

[More Information & Booking](#)

By Venue:
 -- Select Venue --

January 2017

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Navigation bar



Underneath the organisation's logo you will see the navigation bar running across the screen. The first option will be **Events & Courses** but the titles of the other page links will differ depends on your organisation's website. All links apart from the **Events & Courses** tab will take you to the organisation's main website.

Terms and Conditions

In the footer at the bottom of the page you will see a button labelled **Terms & Conditions**. All event booking terms and conditions will be detailed here for your reference.

[Your History & Bookings](#) [Logout](#) [Terms & Conditions](#)

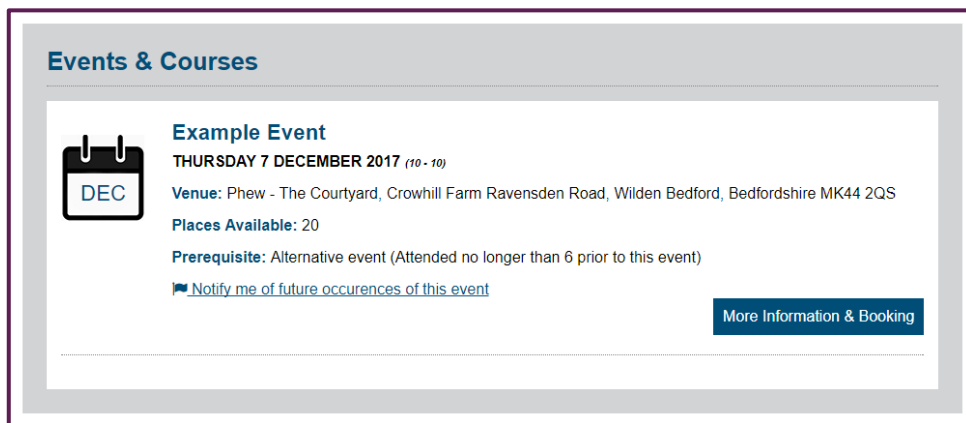
Address: Building 115 Bedford Technology Park MK44 2YA
 Call: 01234 779 050
 Email: support@phew.org.uk

Finding an event

Events List

Click on **Events & Courses** will take you to a list of upcoming events.

Note: This can also be accessed by going directly to the booking system website address.




For each event you will see a calendar icon on the left with the month of the event, then to the right of that will be the event's title, full date, time, venue, booking status and places available and cost (if applicable).

See other dates




Underneath the event information will be a text button option to **See other dates**; this will take you to a similar list displaying all the same information for each occurrence of that chosen event.

Events & Courses : Example Event




Example Event
THURSDAY 19 SEPTEMBER 2019 (9:30 - 17:00)
Venue: Phew - The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS
Places Available: 0
Cost: Free
[- Go back to all events & courses](#)

More Information & Booking



Example Event
THURSDAY 24 OCTOBER 2019 (9:30 - 10:30)
Venue: Phew - The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS
Places Available: 12
Cost: Free
[- Go back to all events & courses](#)

More Information & Booking



Example Event
THURSDAY 21 NOVEMBER 2019 (9:30 - 17:30)
Venue: Phew - The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS
Places Available: 12
Cost: Free
[- Go back to all events & courses](#)

More Information & Booking

You may want to use this if, for example, you would like to attend the event but cannot make the time and date shown. To go back to the main list, click the **Go back to all events & courses** link.

Upcoming occurrences notifications

You can subscribe for notifications of future occurrences of an event by using **Notify me of future occurrences of this event**. If you **click this link**, then you would be sent emails and notifications for when future occurrences of this event take place.

On the right-hand side you will see a button labelled **More Information & Booking**, this will be covered in more detail in the **Booking onto an event** section on the manual.

Searching by venue or by category



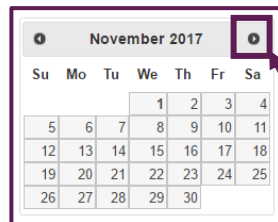
Located on the right-hand side of the **Events & Courses** page they allow you to search for events either by venue and or category. Within this box is a drop-down menu which will display all the registered locations or categories for this organisation.

If you want to search for an event **By Venue** (location) and or **By Category** you can do so here by selecting the relevant one from the drop-down.

Once you have selected the venue or category the page will refresh, and the only events listed to the left will be ones being held at that venue.

If there are no upcoming events taking place at that venue the events list will be blank.

Searching by date



On the right-hand side of the of the **Events & Courses** page there is an online calendar.

To search for an **event by date** select the date you want to search by using the arrows either side of the of the month and then select a date.

Once you have selected the date the page will refresh, and the only events listed to the left will be ones being held at that venue.

If there are no upcoming events taking place at that venue the events list will be blank.

Booking onto an event

Once you have found an event you would like to book on to, click the **More Information and Booking** button to the right-hand side of the event details.

More Information & Booking

You will be directed to a new page with full event details.

[Home](#) > [Events & Courses](#) > [Example Event](#)

Example Event

Date & Time:
THURSDAY 21 NOVEMBER 2019 (9.30 - 17.30)

Venue:
Phew, The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS

Detail:
Lorem ipsum dolor sit amet, consectetur adipiscing elit. In molestie nibh at imperdiet iaculis. Donec nec elit viverra velit ornare bibendum. Maecenas magna purus, accumsan a mattis sed, sodales quis urna. Sed tristique in augue ut posuere. Fusce vitae sagittis tellus, vitae tristique erat. Ut condimentum quis nisi vel laoreet. Duis sit amet ligula fringilla, ullamcorper tortor eget, condimentum neque. Cras ut porta ipsum, sed dictum turpis. Etiam a velit luctus, imperdiet massa ut, pellentesque turpis. Pellentesque gravida sit amet lorem in faucibus.

Places Available:
12

Booking:

** Required Field
Phew Admin Email *

Phew Address *

Phew By booking on this event you agree to the terms and conditions.

Book Now

Further Information:

Type:
Standard Event


Enquiries:
Jaz Brace

Trainer:
H Williams

Venue Details:
Phew, The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS
(01234 603 042)

[Website](#)
its PHEW HQ!

[View larger map](#)



Map data ©2019 Terms of Use Report a map error

This will include the:

Revision ver3-Aug 2019

- **Event title:** the name of the event.
- **Date and time:** the date and time of the event.
- **Venue:** where the event is taking place.
- **Detail:** a more in-depth details of the event.
- **Places available:** the number of places available.
- **Booking:** either a button to book on to the course **or** a message informing you that booking has closed.

Under further information there are:

- **Type:** type of event.
- **Enquiries:** who to contact if you require further information.
- **Trainers name:** if updated.
- **Venue details:** the venue details and an interactive map.

Places Available:

12

Booking:

* Required Field

Phew Admin Email *

hiliary.williams@phew.org.uk

Phew Address *

Building 115
Bedford Technology Park
MK44 2YA

Phew By booking on this event you agree to the terms and conditions.

Book Now

By clicking the **Book Now** button you will be booked onto the course.

If there is a Pre-Booking evaluation, then you are required to fill this out before booking onto the event.



Not all events will have been set up with this check.

Down the right-hand side of the page towards the top you will see a box with a link to more occurrences of the same event as well as the venue and date search boxes.

Cancel a booking

Active Bookings			
Information	Cancelled	Cancel	Actions
How to create a Project in Asana Phew - The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS 23-08-2019 (9:30 - 12:30)	No	Cancellation Date Expired	

Event History							
Information	Attended	Cancelled	Certificate				
Your Payment History							
Event	Amount	Reference	Date	Refunded	Refund Amount	Refund Comment	Receipts

To cancel a booking simply go to the **Your History & Bookings** page and select the cancel option alongside the relevant event in the **Active Bookings** table. If you are no longer in the cancellation period for this event, this will be shown in the **Cancel** space in the table.

Attending an event

QR Codes



In some instances when you book onto an event and attend that event you will be required to bring a **QR code** with you. You will be notified of this by email and you will need to print this off and bring it with you on the day of the event.

Delegate Managers

What is a delegate manager and how do you become one?

Delegate managers are a special type of delegate which can add and manage other delegates within their organisation. This is useful for office administrators or other managers who wish to book multiple members of their staff on courses and keep track of their progress.

To become a delegate manager

- You must register as a normal delegate
- Then request an upgrade by using the contact details on the site (Phone or Email).
- When you request upgrade to a delegate manager please ensure you ask for all the delegates already registered on the system and that are part of your organisation to be linked to you.



This is important so you don't have to re-register delegates.

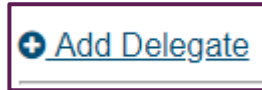
If you are setup as a delegate manager, you can still do all of the actions as a normal delegate, e.g. book on events etc except when you login, you will see this screen:

This screen is always accessible from the following top navigation link:



Adding a delegate

To add a delegate simply click this link from the delegate managers screen:



From here you can fill out the details of the delegate:

- **First Name:**
- **Last Name:**
- **Role/Title:**
- **Organisation:** automatically filled in
- **Organisation Type:** automatically filled in
- **Phone:** work phone.
- **Mobile:**
- **Address:** this is their work address.
- **Correspondence address:**
- **Email/Username:**
- **Password:**
- **Admin Email:** automatically filled in and can be changed.
- **Dietary requirements:** special requirements, e.g. vegan
- **Disabilities:** any disabilities, e.g. wheelchair

Then select **Add** button.



it is not a requirement of a delegate added in this way for them to have an email address.



everything * is a mandatory field and must be completed.



there are some labels that can be renamed to suit specific needs.

Once you have added a delegate you can provide the delegate with their login details.

The delegate will be able to login as normal and allow them to login as a normal delegate would do.


This will allow them to book courses and complete evaluations.




if restrict has been set up they will only be able to complete evaluations.

Managing a Delegate

Once you have added a delegate, they will appear in a list on the delegate manager screen link this:

Surname	First Name	Organisation	Username/Email	Restricted	Login as
Brace	Jazmine	Phew	jazmine.brace@phew.org.uk	<input type="checkbox"/>	

You can toggle the **restrict** button against a delegate to stop them from booking on a course should they ever login individually.

Surname	First Name	Organisation	Username/Email	Restricted	Login as
Brace	Jazmine	Phew	jazmine.brace@phew.org.uk	<input checked="" type="checkbox"/>	

For example, you may give them their login details to login and complete an evaluation to access their certificate but in doing so you would like to ensure they don't book their self on any other courses.

Surname	First Name	Organisation	Username/Email	Restricted	Login as
Brace	Jazmine	Phew	jazmine.brace@phew.org.uk	<input type="checkbox"/>	

Clicking the **login as** button will log you in as that delegate.

Once you are logged in as a delegate you can access their history under:

- Your History & Bookings
- their details under Your Account.

You should login as a delegate if you would like to update their personal details or would like to check their course history.

If you wish to stop being logged in as a delegate, you can return the delegate home screen via:


[Manage Delegates](#)

Booking your delegates

Once you have your delegates setup you can simply book them via visiting a course and selecting which you would like to book (this list will include yourself).

- Go to **the Events and Courses** page.
- Select the **Course or Event** you wish to book.
- Select **More information & Booking** button.
- Under Booking you will see your list of delegates including yourself.

Booking:		
Select delegates to book, you may book a maximum of 5.		
Surname	First Name	Book
Williams	Hilary	<input type="checkbox"/>
Brace	Jazmine	<input type="checkbox"/>

 there will typically be a maximum number of delegates which you manage that can be booked onto a course.

- Simply tick against the names of the delegates you would like to book.
- Check that the **Admin** email and the **Address** are completed.
- Tick the check box to state that you agree to the terms and conditions.
- Then select the **Book Now** button.

Once you have booked delegates in this way or if a delegate that is linked to you ever books on an event individually

 you will receive all the reminders on behalf of that delegate.

Document Control

This document is maintained as an electronic document.

Document information

Document Title	Delegate manual for WordPress		
Author(s)	Hilary Williams		
Version number	3.00	Document owner	Hilary Williams
Date approved	03/09/2019	Document status	Live
Effective date		Approved by	Kern Roderick-Jones
Superseded version	2.00	Date of next review	

Revision history

System Version	Revision No.	Date	Summary of changes	Revision marks
Ver 2	1.0	01/07/2018	Updated	
Ver 3		Aug 2019	Complete review of the manual and structure and update to mark new features.	

01234 779050
hello@pnew.org.uk
pnew.org.uk

Phew!
LEARNING MANAGEMENT
SYSTEM