

# Manager Guide

Within your Manager Portal you can perform a variety of tasks and view course information.

The guide will walk you through the key tasks that you can complete in your portal.

- **What can I use my portal for?**
- **How do I manage my staff/users?**
- **How do I search for courses?**
- **How can I view upcoming courses for my staff?**
- **How can I transfer delegates?**
- **How can I cancel places?**
- **How can I view all delegate records for my staff**
- **How can I manage my placeholder bookings?**

## What can I use my portal for?

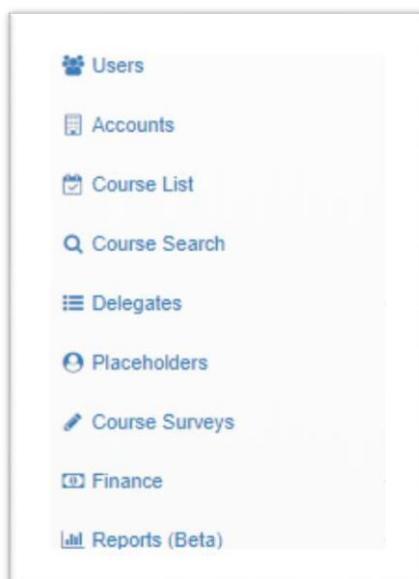
- You can review the course bookings you have made and create new users within your account.
- You can book courses for your users, view training history, and run reports.

### After log in

You will initially log in to your own learning portal, to access your manager portal, click on the menu in to the right corner and select Manager Mode



After selecting Manager mode you will have a different view and menu.



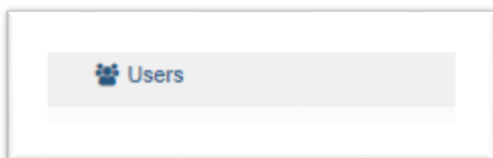
This is your menu bar.

Please note that you will not be able to view Course Surveys this function is not in use.

## How do I manage my staff/users?

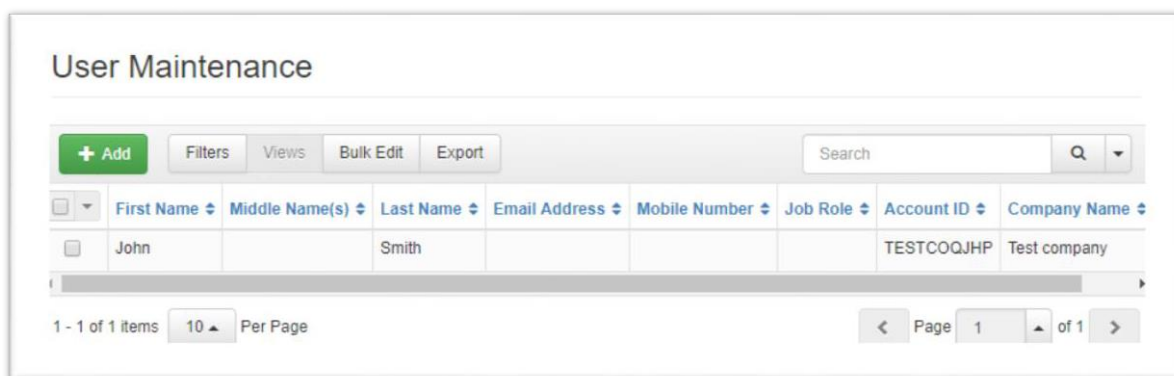
You are able to:

1. View the details of users within your account(s)
2. Edit the details of users within your account(s)
3. Create new users within your account(s)



All of these functions are available in the **Users** page from your menu.

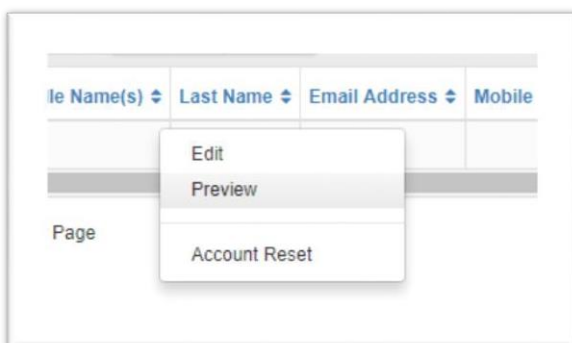
User information is displayed within a DataGrid - therefore this page is known as the **Users DataGrid**:



### Filtering Users

You can create **filters** within this page to allow you to easily lookup users from specific accounts or with specific job roles, this is particularly useful if you have a lot of users to manage. See Appendix A

### 1. View a users details



To **View** a user's details, **right click** on the user's record within the User DataGrid and select the **Preview** option.

A pop up window will then display the user's basic information including contact details:

Preview window showing user details:

Personal	
First Name	John
Last Name	Smith
Date of Birth	Gender

Contact	
Phone Number	Address
Fax Number	
Mobile Number	

## 2. Edit a user's details

← To **Edit** a user's details, **right click** on the user's record within the User DataGrid and select the **Edit** option.

You will be taken to the edit screen where you can make changes to the users's details, and add further information. To save changes made, click '**Save**' at the top right of the page

User Maintenance  
tester tester

Details (selected)  
Awards

### Account Information

[Save](#)

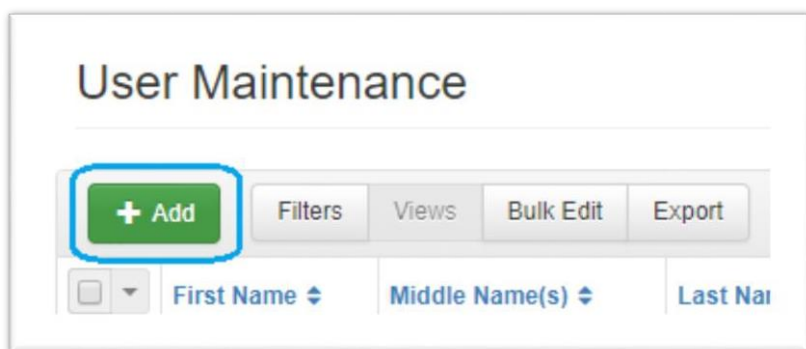
Personal

First Name \*  
John

Middle Name(s)  
\_\_\_\_\_

Last Name \*  
Smith

### 3. Create a new user



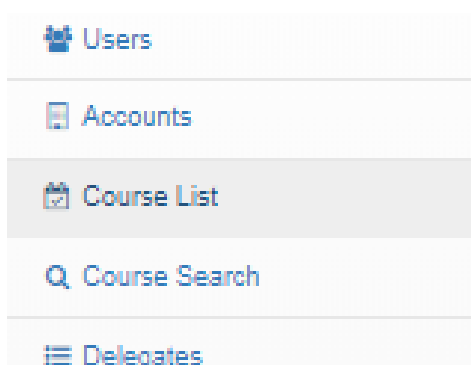
← To **Create** new users, click on the '**Add**' button above the Users DataGrid, this will take you to a form where you can complete the details of the new user.

You only need to supply a minimum of first name, last name and Account (under Employment) (for job roles – you can select from the list, if the role you need is not there, and you want to create a job role please contact [nhastraining@shelter.org.uk](mailto:nhastraining@shelter.org.uk). Click **Save** at the top to finish creating the new user.

How do I search for courses?

There are two pages available for searching for courses for yourself and your employees

#### 1. Course List



← The Course List page can be used to search for future Classroom or Webinar courses

You can use the filter options at the top of this page to search for a specific course and/or within a certain date range: See Appendix A for Setting up filters.

## View Dates

Filters Views Export Search

Filters ▾ No filters defined, please click the New Filter button...

Course ▾ Contains ▾

Start Date ▾ Period ▾ Future ▾

Course Type ▾ Is In ▾ Class, Web ▾

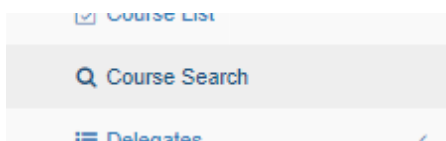
To add a course to your basket to make a booking, simply right click on it and click on the option Add to Basket:

Course Type ▾ Is In ▾ Class, Web ▾

<input type="checkbox"/>	Course ↕	Start Date ↕	End Date ↕	Course Type ↕	Cost ↕	Categories ↕
<input type="checkbox"/>	Housing Foundation Course	29/08/2018 10:00	30/08/2018 16:00	Class	0	Advice Agencies
<input type="checkbox"/>	Housing Foundation Course	04/09/2018 10:00	11/09/2018 16:00	Class	0	Advice Agencies
<input type="checkbox"/>	Housing Foundation Course - Gloucester	04/09/2018 10:00	11/09/2018 16:00	Class	0	Advice Agencies

Follow the Check Out Process below (after Course Search) to complete the booking.

## 2. Course Search



The Course Search allows you to search through all courses including courses which do not yet have any scheduled dates, E-Learning and Document courses.

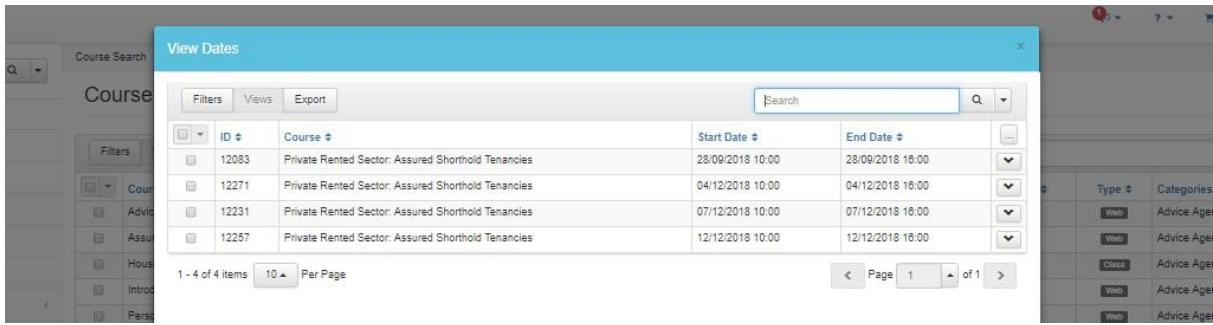
To see if there are any available dates for a course, right click on the course and select 'View dates' option, from here you will be able to see a list of available dates that you can book,

Course Search

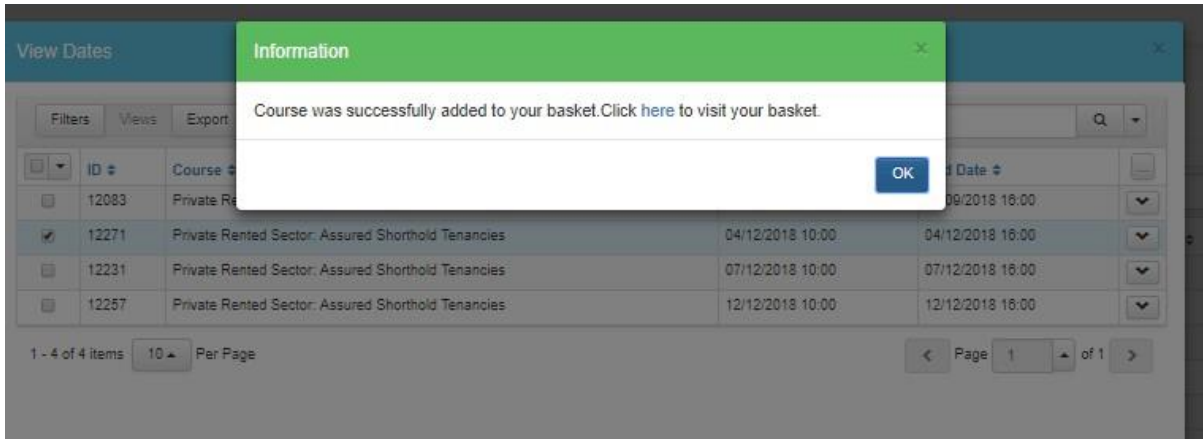
### Course Search

Filters Views Export

<input type="checkbox"/>	Course ↕	Provider ↕
<input type="checkbox"/>	Advice on Tenancy Deposits	Shelter
<input type="checkbox"/>	Assured Shorthold Tenancies: S21 Notices, an overview	Shelter
<input type="checkbox"/>	Housing Foundation	Shelter
<input type="checkbox"/>	Introduction to the Homelessness Reduction Act	Shelter
<input type="checkbox"/>	Persons from Abroad – an introduction to benefits entitlement for EEA Nationals	Shelter
<input type="checkbox"/>	Preventing Mortgage Re...	Shelter
<input type="checkbox"/>	Private Rented Sector: Assured Shorthold Tenancies	Shelter



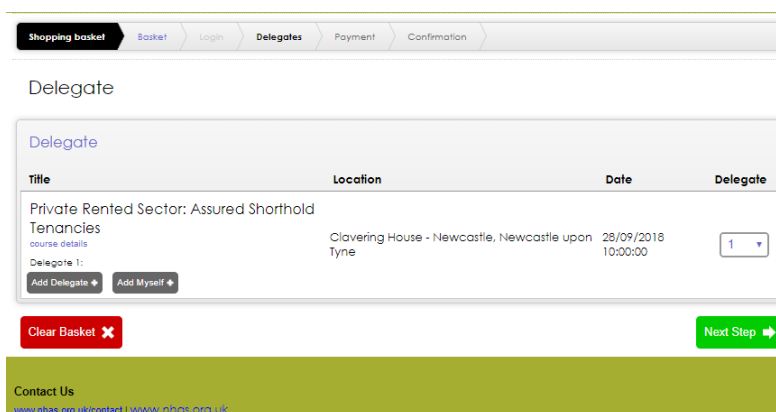
To book a date, just right click on the date that you would like to book and add this to your shopping basket.



The course should be added to your basket. Click OK and then close the View dates datagrid.

## Check Out process

In the top right of your screen, there is a shopping trolley icon. You should see that the shopping trolley/basket now has an item in it, and if you click on the the shopping trolley, you can select Checkout, to complete the booking process.



← When you check out you can amend the number of delegates if you need to, and proceed to the Next Step.

At this point you can add the delegates to the place – select Add Delegate. A box will pop up with any existing staff registered to your organisation’s account. You can select a person if they are already listed, or you can click on Create New to add a new user.

Search

First Name  Last Name  Account

Joe Bloggs Shelter

When adding a new user here, you only need to add the following information:

- First Name
- Last Name
- Email Address (this is where joining instructions will be sent)
- Contact Number
- Additional details – please detail any support needs under ‘Special Requirements’

Once you have added the above information, ‘Save Candidate Details’ and you will then proceed to the next stage ‘payment details’ (please note there is NO BOOKING FEE for our training).

### Payment details (note – our courses are free)

The next step of the process is unavoidably called Payment details. As you will know, we do not have any booking fees for our courses. All you need to do at this point is check the details, **and tick the box for the terms & conditions.** Then you can Complete the process.

Shopping basket Basket Login Delegates Payment Confirmation

Payment details

Basket

Please review your basket.

Title	Location	Date
Private Rented Sector: Assured Shorthold Tenancies <small>course details</small>	Clavering House - Newcastle, Newcastle upon Tyne	28/09/2018 10:00:00

Message to manager

Please enter a message

Billing details

Please enter your billing details below.

This is a private booking billed to my personal account.

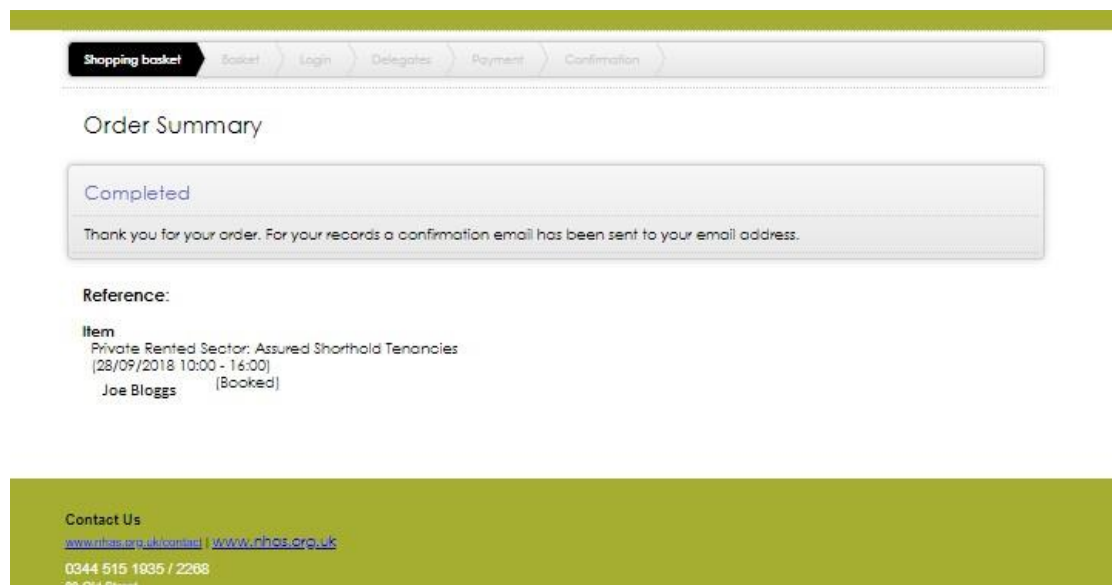
Account

I have read and accept the [terms and conditions](#)

WARNING! Do not use the Back Button or Refresh during the checkout process!

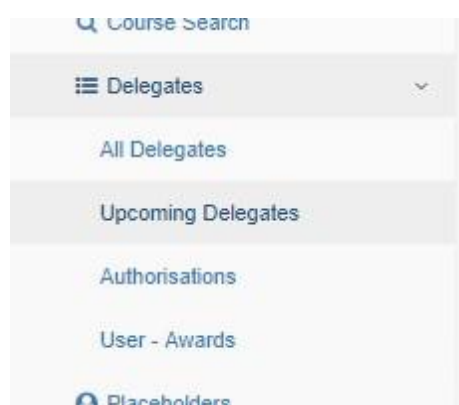
Contact Us

Once you have completed the booking you will get a confirmation message.



## How can I view upcoming booked courses?

You can see a list of the future courses that your staff are attending through the Upcoming Delegates menu option found under the Delegates drop down option in the left hand navigation menu.



This page will only show you a list of delegates for **courses in the future**, if you would like to see a list of delegates including past courses please open the All Delegates menu option

In this page you can **preview** more information about each delegate by **right clicking** on the delegate from the DataGrid and selecting **Preview**.

### Delegate Maintenance

ID	Status	Type	Delegate ID	First Names	Last Name	Delegate Account Name	Course	Course Start Date	
jblogs-33441	Booked	Delegate	112233	JOE	BLOGGS	A Company	Housing Foundation	14/06/2018 09:00	
jlinks-21345	Waiting List	Delegate	134635	HEATH		A Company	Housing Foundation	14/06/2018 09:00	Preview

1 - 2 of 2 items  Per Page < Page 1 of 1 >

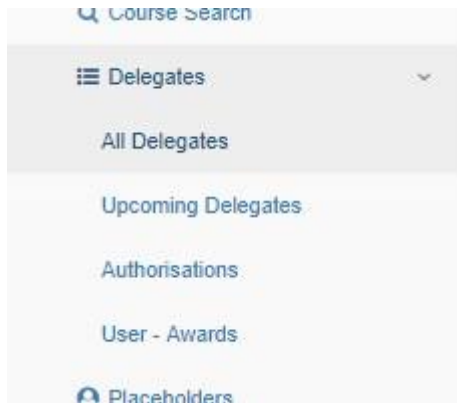


## How can I transfer places?

To transfer delegates on to alternative training sessions, or cancel places on existing sessions you will need to email [nhastraining@shelter.org.uk](mailto:nhastraining@shelter.org.uk).

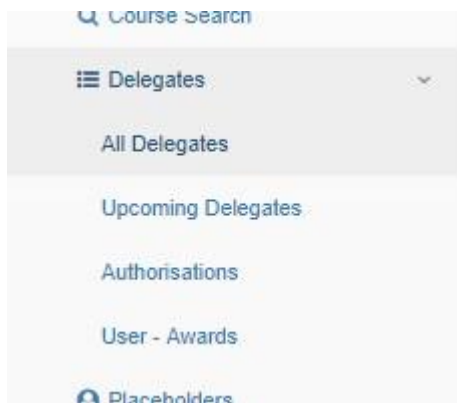
How can I cancel places?

In the Manager portal, click on Upcoming Delegates, right click on the row for the delegate that you wish to cancel the place for, and chose cancel delegates.



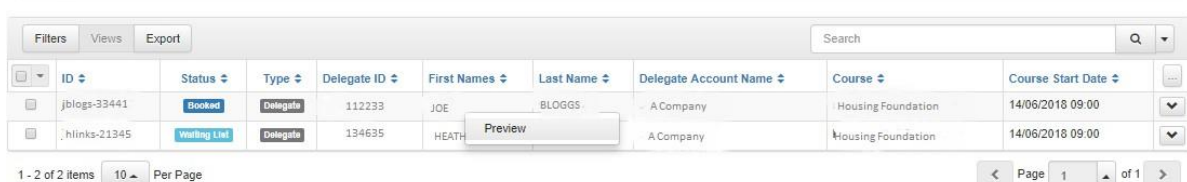
## How can I view all training records?

You can see a list of all courses booked by your organisation (past, present and future) by opening the **All Delegates** menu option found under the Delegates drop down option in the left hand navigation menu.



In this page you can **preview** more information about each delegate by **right clicking** on the delegate from the DataGrid and selecting **Preview**.

Delegate Maintenance



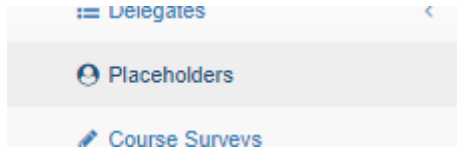
ID	Status	Type	Delegate ID	First Names	Last Name	Delegate Account Name	Course	Course Start Date	
jblogs-33441	Booked	Delegate	112233	JOE	BLOGGS	A Company	Housing Foundation	14/06/2018 09:00	
hlinks-21345	Waiting List	Delegate	134635	HEATH		A Company	Housing Foundation	14/06/2018 09:00	

1 - 2 of 2 items | 10 Per Page | Page 1 of 1

## How can I manage my placeholder bookings?

Placeholder bookings are course bookings where you have not yet provided the names of the delegates that will be attending the course, you have only selected how many places are to be booked for your account(s).

You can view and manage your placeholder bookings by going to the Placeholder option in the navigation menu.



Selecting this option will open a DataGrid containing all placeholder bookings that have been made for your account(s).

You can assign your users to your placeholders by **right clicking** on the placeholder and selecting the **Maintain** menu option

Invoice	Reserved	Used	Remaining	Status	Date Created	
		0	2	Active	18/10/2012 11:09	⋮
		0	2	Active	24/06/2013 11:46	⋮

Page 1 of 1

Within the **Maintain Placeholder** window you can select the users that will be attending the course as delegates.

### Maintain Placeholder

Details

Course Details

Places Reserved  
2

Users

Delegates

Select

Save & Close

# Appendix A

## How to apply filters to a DataGrid

Filters allow you to limit the results shown in your DataGrid so you can quickly find the rows that you are looking for.

There are two ways to filter your DataGrid, you can either use your saved filters or you can build an ad-hoc filter for use now.

### Create a new filter

Click on Filter on the left, and then click on More Filters from the right hand side, choose Create New.

The screenshot shows a 'Course Search' interface. At the top, there is a search bar and a 'Search' button. Below the search bar, there are two buttons: 'Filters' and 'Export'. The 'Filters' button is circled in red. Below the buttons, there is a message: 'You do not yet have any filters defined for this DataGrid, to create a filter please click the More Filters button'. Below the message is a data grid with the following columns: Course, Provider, Cost, Cost Type, Type, and Category. The 'More Filters' dropdown menu is circled in red, showing a 'Create New' option.

Course	Provider	Cost	Cost Type	Type	Category
Advice on Tenancy Deposits	Shelter	0	Day	Web	Advice Agencies
Assured Shorthold Tenancies: S21 Notices, an overview	Shelter	0	Day	Web	Advice Agencies
Housing Foundation Day 1	Shelter		Delegates	Class	Advice Agencies
Housing Foundation Day 2	Shelter		Delegates	Class	Advice Agencies
Introduction to the Homelessness Reduction Act	Shelter	0	Day	Web	Advice Agencies
Persons from Abroad – an introduction to benefits entitlement for EEA Nationals	Shelter	0	Day	Web	Advice Agencies
Preventing Mortgage Repossessions	Shelter	0	Day	Web	Advice Agencies
Private Rented Sector: Assured Shorthold Tenancies	Shelter	0	Day	Class	Advice Agencies
Right to Rent Immigration Checks	Shelter	0	Day	Web	Advice Agencies
S21 Notices: new tenancies from 1 October 2015	Shelter	0	Day	Web	Advice Agencies

The page will then display the options that you need to build a new filter.

You can change the fields as applicable below. In this case the filter is to show Housing Foundation courses: Remember to rename your filter (4<sup>th</sup> circle below). Then SAVE. This should apply your change.

## Course Search

The screenshot shows the 'Course Search' interface. At the top, there are 'Filters' and 'Export' buttons, and a search bar. Below this, a message states: 'You do not yet have any filters defined for this DataGrid, to create a filter please click the More Filters button'. The filter configuration area shows a dropdown menu for 'Course' with a 'Contains' operator selected. The search term 'Foundation' is entered in the adjacent text box. A 'Save' button is visible next to the search term. Below the filter configuration, a table displays search results:

Course	Provider	Cost	Cost Type	Type	Categories
Advice on Tenancy Deposits	Shelter	0	Day	Web	Advice Agencies
Assured Shorthold Tenancies: S21 Notices, an overview	Shelter	0	Day	Web	Advice Agencies

To remove your filter, just click on the filter in the field menu. It will change from blue to grey once removed.

## Course Search

The screenshot shows the 'Course Search' interface after the filter has been removed. The 'Foundation' filter is now displayed in a grey box in the filter bar. The table below shows the search results:

Course	Provider	Cost	Type	Categories
Housing Foundation Day 1	Shelter		Class	Advice Agencies
Housing Foundation Day 2	Shelter		Class	Advice Agencies

At the bottom of the interface, there is a pagination control showing '1 - 2 of 2 items' and '10 Per Page'. The page number is '1' of '1'.

All your saved filters will be displayed in the filter bar and via the More Filters list.

## Changing the columns in your view

You may want to change your default view in any of the datagrids. To do this you need to click on the columns button (three dots):

Course Search

Course Search

Filters Export Search

Foundation More Filters

Course	Provider	Cost	Cost Type	Type	Categories	
<input type="checkbox"/> Advice on Tenancy Deposits	Shelter	0	Day	Web	Advice Agencies	⋮
<input type="checkbox"/> Assured Shorthold Tenancies: S21 Notices, an overview	Shelter	0	Day	Web	Advice Agencies	▼
<input type="checkbox"/> Housing Foundation Day 1	Shelter		Delegate	Class	Advice Agencies	▼
<input type="checkbox"/> Housing Foundation Day 2	Shelter		Delegate	Class	Advice Agencies	▼
<input type="checkbox"/> Introduction to the Homelessness Reduction Act	Shelter	0	Day	Web	Advice Agencies	▼
<input type="checkbox"/> Persons from Abroad – an introduction to benefits entitlement for EEA Nationals	Shelter	0	Day	Web	Advice Agencies	▼
<input type="checkbox"/> Preventing Mortgage Repossessions	Shelter	0	Day	Web	Advice Agencies	▼
<input type="checkbox"/> Private Rented Sector: Assured Shorthold Tenancies	Shelter	0	Day	Class	Advice Agencies	▼

This opens an information box where you can use the plus and minus buttons to add or remove the available fields. You can also change the order of the columns by moving them up or down using the vertical double ended arrow – as highlighted below.

Remember to click on Apply to save the changes.

# Course Search

Filters Export

Foundation

Course

- Advice on Tenancy Deposits
- Assured Shorthold Tenancies: S21 Notices, an overview
- Housing Foundation Day 1
- Housing Foundation Day 2
- Introduction to the Homelessness Reduction Act
- Persons from Non-EU/EEA - an introduction to benefits
- Preventing Mortgage Repossessions
- Private Rented Sector: Assured Shorthold Tenancies
- Right to Rent Immigration Checks
- S21 Notices: new tenancies from 1 October 2015

Sean11

More Filters

Provider	Course	CostO	Cost	Type	Categories
Shell	Course				
Shell	Probleir....				
Shell	Cost t T				
Shell	Cost Yifl •				
Shell	Type				
Shell	Ca egories ..				

Restore Default Columns