

Learning Management System

Delegate User Manual



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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

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

Communication

The screenshot displays the Phew! Learning Management System interface. At the top, there is a grey header with the text "Site communication". Below this is the Phew! logo (a blue water drop) and the tagline "Potential Realised". To the right of the logo are "Login" and "Register" buttons. A dark blue navigation bar contains the following menu items: "Events & Courses", "eLearning Courses", "Our Work", "What We Do", and "Why Us". Below the navigation bar is a breadcrumb trail: "Home > Events & Courses > Light sabre training - Stage 1". The main content area is titled "Light sabre training - Stage 1" and contains the following information:

- Date & Time:** TUESDAY 31 MARCH 2020 (9 - 17)
[Notify me of future occurrences of this event](#)
- Venue:** Phew house, x
- Detail:** This is to show the basics on how to use the wapon

On the right side of the main content area, there are two filter boxes:

- More Occurrences:** Friday 10 April 2020 x, Thursday 30 April 2020 x
- By Venue:** -- Select Venue --
- By Category:** -- Select Category --

This is where your learning provider will communicate general information to you.
This is not always visible.

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'. Below the navigation, there is a breadcrumb trail 'Home > Events & Courses' and a brief introduction to the booking system. A 'Please note' section states that individuals must create their own account. The main content area features an 'Events & Courses' section with an 'Example Event' for Sunday 20 October 2019. The event details include the venue, zero places available, and a cost. A 'More Information & Booking' button is provided. To the right, there are filters for 'By Venue' and 'By Category', and a calendar for August 2019. The footer contains 'Login', 'Register', and 'Terms & Conditions' buttons, along with contact information: Address: Building 115 Bedford Technology Park MK44 2YA, Call: 01234 779 050, and Email: support@phew.org.uk. A footer note 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 in the top right-hand corner to set an account up. You will be taken to the registration page which will have a series of fields for you to complete.

 You only need to register once not every time you book a course if you have forgotten your password you can select the reset password on the Login screen.

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

Your Details

First Name *

Last Name *

Your Role/Job Title *

Your Organisation *

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

* -- Please Select --

None applicable? [Contact us](#)

Finance Name *

Finance Email *

Linemanager Namex *

Linemanger Emailx *

Phone Number *

Mobile

Address 1 *

Address 2 *

Disabilities to be aware of



This can be different depending on the features that have been switched on by the administrators in site settings.

- **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, e.g. self-employed.
- **What best describes your organisation:** this is a dropdown of the current Organisation Types set up – these are representative of the different e.g. sectors. Select from the drop-down which one, your organisation best suits.



Note these can be different depending your setup.

- **Finance Name:** type in the contact finance name.
 - **Finance e-mail:** this would be the finance email address.
 - **Line manager name:** this would be the line managers name.
 - **Line manager e-mail:** type in your line manager email address.
 - **Phone Number:** your phone number.
 - **Mobile:** your mobile number.
 - **Address 1:** your address.
- ✓ This can be your organisation's address.
- **Address 2:** optional second address.
 - **Dietary Requirements:** if you have any dietary requirements please enter them here. e.g. vegan or gluten free.
 - **Disabilities to be aware of:** if you have any dietary requirements please enter them here 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 *	<input type="text"/>
Confirm Email *	<input type="text"/>
Password *	<input type="password"/>
	8 more characters needed.
Confirm Password *	<input type="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.

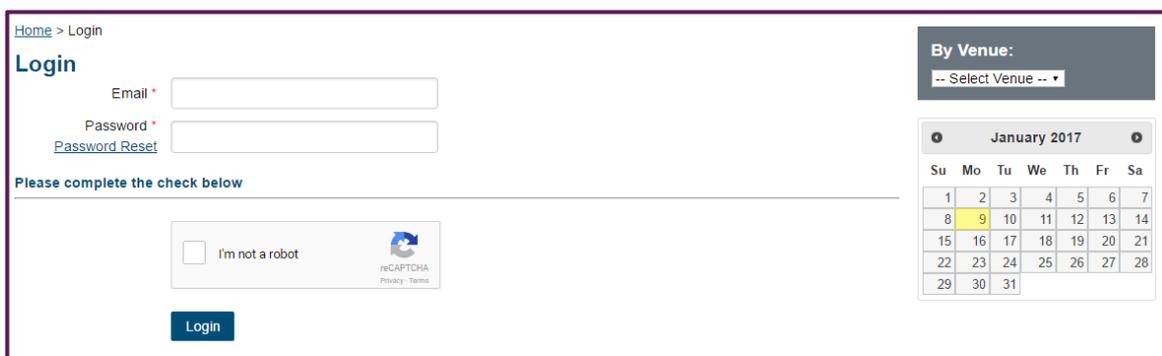
The screenshot shows a registration form with the heading "Please complete the check below". Inside the form, there is a reCAPTCHA widget with a checkbox labeled "I'm not a robot" and a "reCAPTCHA" logo with "Privacy - Terms" below it. Below the reCAPTCHA widget is a blue "Register" button.

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

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

The screenshot shows the "Events & Courses" page. At the top, there is a green confirmation message: "Thank you for registering, you can book on the site". Below this, there is an event listing for "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 free. A blue button labeled "More Information & Booking" is located at the bottom right of the event listing.

Logging In



Home > Login

Login

Email *

Password *

[Password Reset](#)

Please complete the check below

I'm not a robot 

[Login](#)

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				

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.

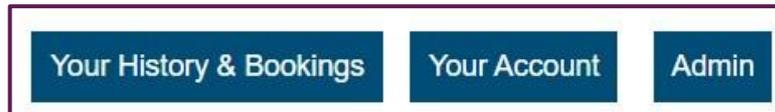
Once all the fields have been completed click the **Login** button underneath the spam box.

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

[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
-------	--------	-----------	------	----------	---------------	----------------	----------

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.**

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	

Active Bookings

Information	Cancelled	Cancel	Actions
Light sabre training - Stage 1 Phew house - x 20-03-2020 (9 - 12)	Yes	This has been cancelled: Cancelled 1234	

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. If the event has been cancelled it will state with a reason.
- **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 to complete.

Event History

Event History			
Information	Attended	Cancelled	Certificate
Flight Training Tatooine Star base - Tatooine 26-09-2019 (9:30 - 17:00)	No	No	
Flight Training Tatooine Star base - Tatooine 16-10-2019 (9:30 - 16:30)	No	No	
Force Training Tatooine Star base - Tatooine 30-10-2019 (9:30 - 17:00)	No	Yes This has been cancelled: Trainer in car accident we will be rearranging	

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. If the event has been cancelled it will state here as well.
- **Certificate:** there will be a link to access your certificate (if applicable) unless you need to complete an evaluation first.

Active eLearning Courses

Title	Load Course	Cancel
Child Development e-Learning		Cancel

This will show the list of eLearning courses you have booked on to.

eLearning History

Title	Cancelled	Result	Reattempt	Certificate
An Awareness of Child Abuse and Neglect	No	Passed	Not required	Download

This will give you a list of the eLearning courses you have completed with the result and the ability to download your certificate.

Your Payment History

Event	Amount	Reference	Date	Refunded	Refund Amount	Refund Comment	Receipts
An Awareness of Child Abuse and Neglect 01-01-1970	£36.00	2Z548JBFHQ7H	14-03-2020				

- **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.

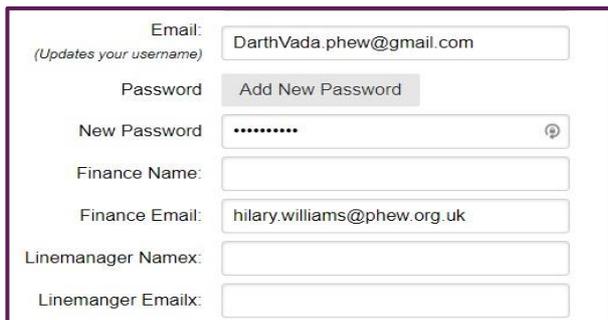
Your event waiting list

Your Event Waiting List				
Title	Location	Date	Places	Leave List
Another Event2	Phew house	20-03-2020 (10 - 12)	18	
Light sabre training - Stage 1	Phew house	31-03-2020 (9 - 17)	0	

As a delegate you can add yourself to a waiting list for the course you wish to attend if it is complete. You can leave the list if you do not want to go on the list or no longer can attend if a place becomes available.

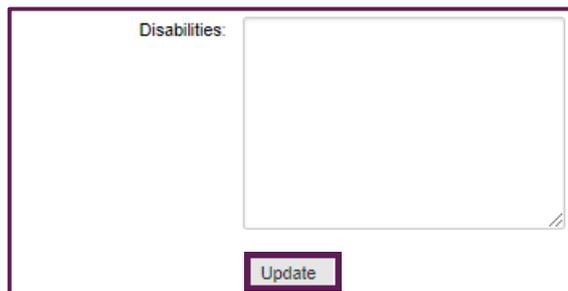
If you click that you wish to leave the list, you will be asked “Are you are sure you wish to leave this waiting list?” select OK to leave or Cancel to save.

Your Account



The screenshot shows a form with the following fields and buttons:

- Email: (Updates your username)
- Password:
- New Password:
- Finance Name:
- Finance Email:
- Linemanager Namex:
- Linemanger Emailx:

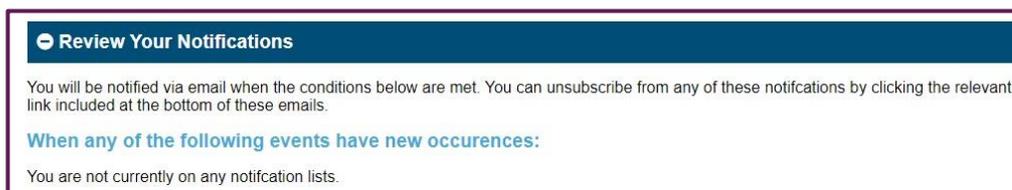


The screenshot shows a section titled "Disabilities:" with a large empty text area and an "Update" button at the bottom right.

This page shows you your account details and allows you to make any changes and or updates to your personal information such as password change or adding line and of finance emails if required.

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

Review your notifications



The screenshot shows a section titled "Review Your Notifications" with the following text:

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.

When any of the following events have new occurrences:

You are not currently on any notification lists.

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

<p>Email: <input type="text" value="email@pnew.org.uk"/> <i>(Updates your username)</i></p> <p>Password <input type="button" value="Add New Password"/></p>	<p>Email: <input type="text" value="email@pnew.org.uk"/> <i>(Updates your username)</i></p> <p>Password <input type="button" value="Add New Password"/></p> <p>New Password <input type="text" value="...."/> 4 more character(s) needed</p>
---	--

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

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.

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

Events & Courses

[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				

15
Revision ver 4 – Mar 2020

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.

Top 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.

Footer Navigation bar



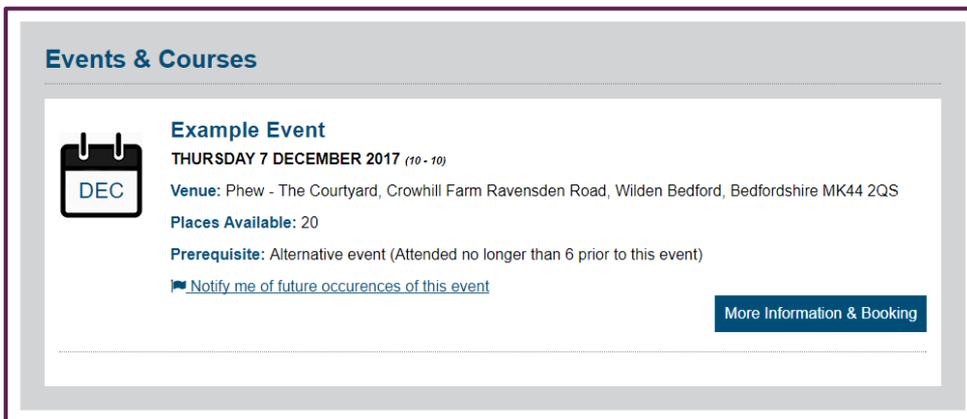
In the footer at the bottom of the page you will see different buttons depending on how the system has been created.

- **Your History & Bookings:** this takes you to your history and bookings.
- **Logout:** ability to log out of the system.
- **Terms & Conditions:** All event booking terms and conditions will be detailed here for your reference.
- **Privacy Policy:** this references the companies privacy policy (GDPR).

- **Accessibility statement:** this references the companies accessibility statement.
- **Cookies Policy:** this references the companies cookies policy.

Finding an event

Events List



Events & Courses

 **Example Event**
THURSDAY 7 DECEMBER 2017 (10 - 10)
Venue: Phew - The Courtyard, Crowhill Farm Ravensden Road, Wilden Bedford, Bedfordshire MK44 2QS
Places Available: 20
Prerequisite: Alternative event (Attended no longer than 6 prior to this event)
[📧 Notify me of future occurrences of this event](#)

[More Information & Booking](#)

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



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

[See other dates](#)

[More Information & Booking](#)

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](#)

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.

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, category or date



Located on the right-hand side of the **Events & Courses** page they allow you to search for events either by venue category and or date. 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. To Search by date, select the day in the calendar.

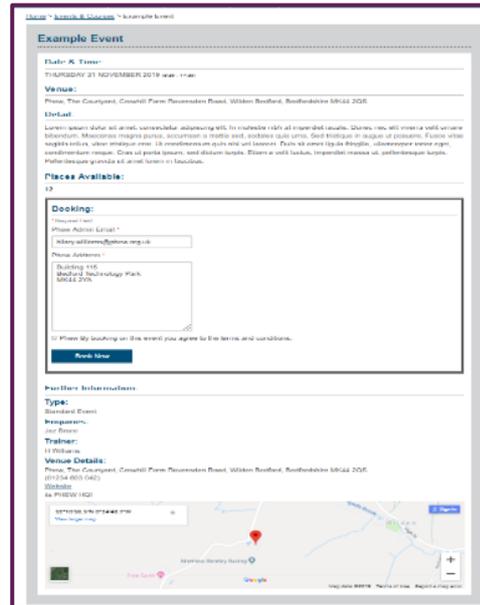
✓ The dates in bold have events on them.

Once you have selected the venue, category or date, the page will refresh and to the left will show the events available.

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

Booking onto an event

More Information & Booking



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

This will include the:

- **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 this has been added by the event administrator.
- **Venue details:** the venue details and an interactive map.

Places Available:

12

Booking:

* Required Field

Phew Admin Email *

hilary.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
Potions course Phew house - x 30-09-2050 (10 - 10), 30-10-2050 (10 - 10), 30-11-2050 (10 - 10)	No	Cancel	

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.

Delegate Management

Manage Delegates

Delegate Management

Your Delegates

Below are a list of delegates which you manage. You can login as each delegate to edit their personal information or view their history. If a delegate is marked as restricted below this means they cannot book on the system if they were to login individually.

[Add Delegate](#)

Surname	First Name	Organisation	Username/Email	Restricted	Login as
Leia	Princess	Star Wars	PrincessLeia.phew@gmail.com	<input type="checkbox"/>	
Mccallum	Kern	Phew	kern123	<input checked="" type="checkbox"/>	
Skywalker	Luke	Star Wars	Lukeskywalker.phew@gmail.com	<input type="checkbox"/>	
Solo	Hans	Star Wars	user4@gmail.com	<input type="checkbox"/>	
Vader	Darth	Star Wars	user2@gmail.com	<input type="checkbox"/>	

If you are setup as a delegate manager, you can still do all the actions as a normal delegate, e.g. book on events etc except when you login you will have an extra

button at the top right called **Manage Delegates**. Delegate managers can allow the delegates to book their own courses unless they use the **Restricted** button which will allow them to log on complete their evaluations and download their certificates.

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:



The login details can be different depending on how the site has been set up.

- 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, e.g. Domestic staff.

 everything * is a mandatory field and must be completed.

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 **Restricted** has been set up they will only be able to complete evaluations.

How to restrict a Delegate

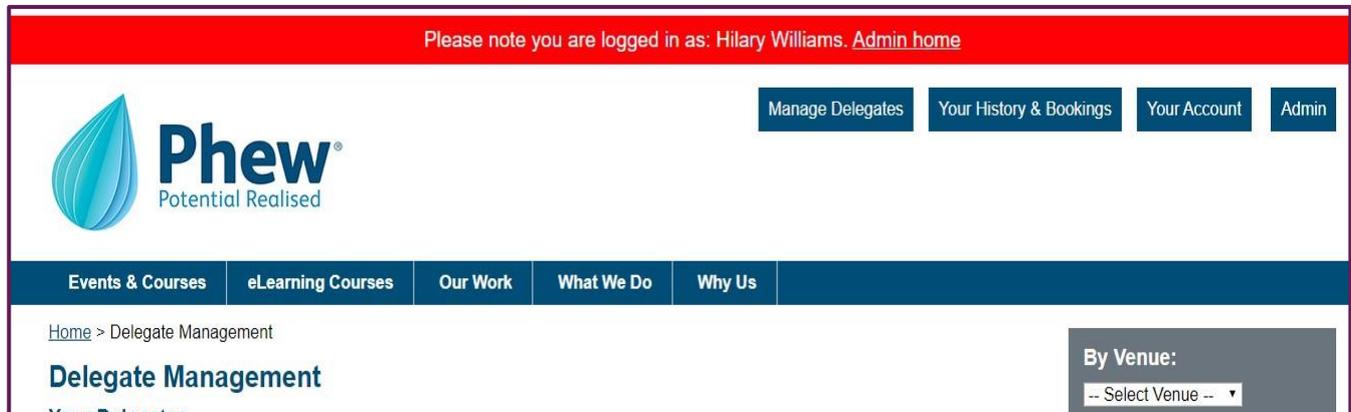
Surname	First Name	Organisation	Username/Email	Restricted	Login as
Brace	Jazmine	Phew	jazmine.brace@phew.org.uk	<input type="checkbox"/>	

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

Once you have added a delegate, they will appear on the delegate manager list. You can toggle the **restrict** button against a delegate to stop them from booking on a course should they ever login individually.

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.

How to login as a Delegate



Clicking the **login as** button will log you in as that delegate. At the top of the screen you will see you are logged in as the 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

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"/>

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.

 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

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Revision history

System Version	Revision No.	Date	Summary of changes	Revision marks
Ver 2	1.0	Jul 2018	Updated	
Ver 3		Aug 2019	Complete review of the manual and structure and update to mark new features.	
Ver 4		Mar 2020	Moved to new template and added the new features line and finance manager and the New waiting list feature	

Contact your Learning Management provider

