

Facilities guide: menus and tabs to use and avoid

Menu structure: **GREEN we use**, **RED we avoid**, others optional (not trained)

Menu bar	Drop-down menus	Comments
Action	Actions for me Actions from me Actions all	
Calendar	Various calendar views	OnCourse <i>internal</i> calendar
Contact	Find Company Find Contact Update Analysis Codes	
Course	Activities Book Private Delegate – Wizard Bookings Course Templates Refresher Training Schedule Availability Waiting List	Frequent – also see below Frequent – also see below
Mailshot	Mailshot Mailshot by Course Campaigns New Customer Contact Analysis Code Usage	
Maintain		Very limited use by <i>Administrator</i> role only
Reports	Course Reports Management reports	Available to <i>Administrator</i> role only
About	About Info Online Help	

Course Template tabs: **GREEN we use**, **RED we avoid**, others optional (not trained)

Activities	Analysis Codes	Documentation	Exams	Evaluations	Qualifications	Resources	Topics	Inclusions
Image of Course	Pre-Requisites	Products	Course Page Layout	Delete Course				
Main Details	Prices	Times	Additional Details	Email Templates				

Schedule tabs:

Actions	Activities	Analysis Codes	Bulk Delegate Updates	Documentation	Evaluations	Delegates & Printing
Evaluation Reports	Exams	Finance	Qualifications	Resources	Topics	Change Schedule Days/Dates
Online Check	Waiting List Browser					
Main Details	Times	Prices	Location And Address	Additional Details	Email Templates	

Delegate statuses and their meaning

These statuses apply to delegate bookings and cancellations. Statuses can be set by administrators through 'Delegates and Printing'

Statuses that start with the word 'Cancelled' do not count toward a schedule's count of the number of delegates enrolled.

Status	Use for
Attended	Attended course to tutor's satisfaction
Attended – part only	Attended only part of course (e.g., left early)
Cancelled- annual leave	
Cancelled – course cancelled	Use when an entire schedule has been cancelled (e.g., tutor sick)
Cancelled – declined	Declined a waiting list offer
Cancelled – diary clash	
Cancelled – did not accept	Waiting list offer timed-out (no response 3 days after the offer)
Cancelled – late notice	Within provider's late cancellations period (penalty charge, if applicable)
Cancelled – no longer relevant	
Cancelled – other reason	
Cancelled – pressure of work	
Cancelled – sick	
Confirmed	Firm booking, confirmation sent, but course has not yet run
Did not attend	Did not show up on the day (penalty charge, if applicable)
Did not attend - excused	Did not show up, but gave an acceptable reason (no penalty charge)
Offered	Waiting list place has been offered
Provisional	Provisional booking (place reserved), confirmation not yet sent
Status unknown	e.g., roster has been lost, attendance has not been recorded.