



Course Manager V2

Course Booking Management System (CBMS)

Delegate User Guide

Hicom Technology
Version 2.01

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Intrepid: V10 is an online system designed to manage trainees and their education, and forms part of the Intrepid HR software suite used to administer training, education and career progression in the healthcare section.



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Distribution

Although this user guide is expected to be distributed across the CBMS Delegate user base, this document is confidential and must **not** be made available publically or distributed to persons outside of your organisation.



1 Introduction

This guide is to assist you with setting yourself up as a delegate and navigating through to book yourself on Courses, administer your account and also provide feedback to help improve services for future courses.

1.1 Overview

The Course Manager system allows Delegates to book onto a course or event online, submit cancellation requests and email administrators questions about courses.

Courses are the shell; they contain basic information regarding the course. An Event is a specific instance of a course. There may be one or more Event dates for a Course, but each Event in a Course follows the same programme.



2 Getting Started

2.1 Accessing the System

When first accessing the System you will be presented with the **CBMS login** page, where you can search for specific Course and Events prior to logging on.

The **CBMS login** screen is displayed.

intrepid: course booking management system **NHS**

01234 567890

GENERAL

Home
Courses/Conferences
Events
Previous Page

SIGN IN

Email address:
Password:
[sign-in](#)

[Forgotten your password?](#)

[Register here](#)

Unauthorised access to this system is strictly forbidden.
Under the Computer Misuse Act 1990 it is a crime to knowingly access this or any other system or modify its contents without permission.

WELCOME TO THE COURSE BOOKING MANAGEMENT SYSTEM (CBMS)

This system provides course/conference and event information for all courses and conferences offered by the Courses and Conferences Centre, on behalf of *Health Education Wessex, Health Education Thames Valley and Thames Valley Leadership Academy*.

Following the one-step registration process you will be able to book and pay online for places on events, register your interest in courses or conferences and follow the progress of your bookings via your 'My Courses & Conferences' section. [... read more](#)

COURSES/CONFERENCES

View available courses and conferences by clicking on the hyperlinks below

- All Courses & Conferences (137)
- Computing and IT (30)
- Conferences (10)
- Educator and Trainer Development (4)
- Leadership and Management (9)
- Medical Specialty (1)

EVENTS BY MONTH

Search for a course or conference by name or browse events by expanding the required month from the list below:

- May 2014
- June 2014 (3)
- July 2014
- August 2014 (1)
- September 2014
- October 2014
- November 2014
- December 2014
- January 2015
- February 2015
- March 2015
- April 2015 (2)

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Fig 2.1 CBMS login screen

From this screen you can do the following:

- Login to CBMS by entering your email and password into the fields located within the **Sign In** panel on the left-hand side, in the area outlined in red in Fig 2.1 above
- Register for an account, in the area outlined in orange in Fig 2.1 above. For further details see section 3
- View available Courses and Conferences by clicking on the hyperlinks and searching for a Course/Conference by name or browse Events by expanding the required month, for further details see section 4



- Reset your password, in the area outlined in green in Fig 2.1 above
 - When you click on **forgotten your password** you are taken to the reset password screen, as shown in Fig 2.2 below. Enter your email address and click on **Reset password**. You will be emailed a new password

RESET PASSWORD BACK 

Please enter your email address and use the link below to reset your password. A new password will be generated and sent to you via email.

Email address:

[→ Reset password](#)

IMPORTANT NOTE REGARDING PASSWORDS

Passwords stored in this application are encrypted and cannot be retrieved directly.

This application will reset your password and email the newly generated password to your email account.

Fig 2.2 Reset password screen

2.2 CBMS Home Screen

When you have logged onto the system there are numerous functions that will be available to you, which will be covered in this section.

Once you have an account and logged into CBMS you will be taken to the CBMS home screen.

The **CBMS Home Screen** is displayed.



Fig 2.3 CBMS home screen

At the top of the Home screen is the **Notification Bar**, in the area outlined in red in Fig 2.3 above. This displays the currently logged in user on the left and number of unread messages on the right.

On the left hand side are the menu items. These direct you to the various pages within the system. As you click on an option from the left hand menu, the menu on the left may change to reflect additional sub-menu items within. To direct back to the original menu, click either 'cancel', 'back' or 'Home'.

From the Home Screen you can perform the following actions:

- View available Courses and Conferences by clicking on the hyperlinks and searching for a Course/Conference by name or browse Events by expanding the required month
- Access your **Personal** account information by selecting the relevant sub-category from the left-hand menu



3 Register for a Delegate Account

If you need to create an account, from the CBMS login page select **register here** as shown in Fig 2.1, in the area outlined in orange.

Note that self-registration for CBMS may not be possible, depending on individual system configuration.

The **Register** screen is displayed.

REGISTER

SUBMIT

Thank you for choosing to register. Please enter your personal details below and click SUBMIT above.

Please note that we will communicate with you via email. You should provide a secure and individual email address which you check regularly.

Wessex or Oxford Deanery trainees/Educational Supervisors

If you are a Wessex or Oxford Deanery trainee or a Wessex Deanery Educational Supervisor your details should be automatically populated with information from your secure Deanery 'Intrepid' database record.

If you do not register with the correct email address which is held on your Deanery Intrepid database record your details will not automatically populate and the system will not recognise you as a Wessex or Oxford Deanery trainee or Wessex Deanery Educational Supervisor.

If you find any information missing, incorrect or you wish to amend the email address that is held on your Deanery Intrepid database record, please contact 01962 718501 and we will make/request the necessary changes for you.

*** Mandatory fields are shown in bold**

Email address:	<input type="text"/>
Confirm email address:	<input type="text"/>
Password:	<input type="text"/>
Confirm password:	<input type="text"/>

Fig 3.1 Register screen

The first section of the screen is where you can set up your account credentials.

- Enter and confirm your **Email** address and **Password**

The rest of the register screen is for you to enter personal details and any specific requirements that you may have, as shown in Fig 3.2 below.



Are you a Clinician?: <input type="radio"/> Yes <input type="radio"/> No			
Delegate type:	▼		
Job title:			
Surname:			Address type: ▼
Forenames:			Address 1:
Known as (forename):			Address 2:
Sex:	▼		Address 3:
Date of birth (dd/mm/yyyy):			Post town:
Telephone:			County:
			Post code:
			<input type="button" value="SEARCH"/>
Specialty: ▼			Registration type: ▼
Performer number:			Registration number:
			(If you are a trainee please enter N/A)
Dietary requirements:			
Personal biography:			
<input type="checkbox"/> Please confirm you agree to the Terms of Registration by ticking this box Terms and Conditions			

Fig 3.2 Continuation - register screen

Complete the details as follows:

- Select Yes or No to **Are you a Clinician**, and your **Delegate type**
 - **Note**, depending on what you put as a answer to **Are you a Clinician?** Will determine on what **Delegate types** appear. Delegate types are used to determine what job role you do and therefore what courses and events are suited to you. These are controlled by system administrators so if you have any issue about what delegate type you should be in or have an issue with your delegate type then please speak to them. Once a delegate type is chosed then the rest of the fields will become available to fill in. Please give as much info as possible.
- Enter your personal details and any relevant details with regards to **Dietary requirements** and **Personal biography**
- Select and read the **Terms and Conditions** and if in agreement click in the tick-box alongside
- Once all details have been completed scroll to the top of the screen and click on **Submit**, in the area outlined in red in Fig 3.1 above. This will then create your delegate account
 - Please keep a note of your password which is case sensitive but this can be reset using the **Forgotten your password** link, see Fig 2.2 in section 2.2 for more details

The **Registration Successful** screen is displayed.



REGISTRATION SUCCESSFUL

Welcome Angharad Henniker-Parker.

Thank you for registering with the Course Booking Management System (CBMS).

You are now signed in.

Your account credentials will be forwarded to you via email.

Please be aware that receipt times are beyond this system's control and receipt of the registration email may take longer than anticipated.

Fig 3.3 Registration successful

Your account has now been set up and you will receive an email confirmation.



4 Searching for Courses and Events

Courses and Conferences are grouped by category for ease of searching or alternatively an instance of a Course, known as an Event, can be viewed by month. All Courses or Events can be viewed in a list format by clicking on 'Course/Conferences'. These pages contain options at the top of the page allowing filtering of the lists to show specific Courses or Events based on their location or content.

Note, you can search for a course when you are **not** Signed In.

4.1 Courses

There are two ways in which you can search for a Course/Conference, from the left-hand menu and from the home screen.

From the **General** menu on the left-hand side select **Courses/Conferences**.

The **Course/Conference** search screen is displayed.

Course/Conference	Course/Conference type
Acute Simulation Day	GOR: F1 Mandatory
Advanced Life Support	
AHP TEST	
ALEX TEST	
Anaesthesia Test Conference	
Anatomy 1 (Upper Limb)	Computing and IT
Annual SAS Conference 2014	Conferences
ARCP Chairs Training	Educator and Trainer Development

Fig 4.1 Course/conference search screen

From this screen you can do the following:

- Use the search criteria to narrow the results
- Within the search results view a list of the Courses available to you
- View a specific Course by clicking on the name - on doing so the **Course/Conference** screen will be displayed as shown in Fig 4.2 below.



The **Course/Conference** details screen is displayed.

COURSE/CONFERENCE DETAILS BACK

Trauma Response PROGRAMME INFORMATION ASK A QUESTION

<http://www.parkavenuehotel.ac.uk>

EVENT DATES AIMS TARGET AUDIENCE DOCUMENTS COMMENTS

COMMENTS

No parking on site

Please be aware that you will not be able to park on site - the nearest parking is the park and ride

Fig 4.2 Course/conference details screen

This screen has all the information that you will need to know about the Course including the Course **Programme** and **Information**, once clicked on these will download in a PDF format.

To see detailed information for a Course click on each tab in-turn to see the following:

- **Event dates** within the course
- The **Aims** for the course
- **Target Audience** as to who this course is designed for
- Any **Documents** associated to the course

Any other information will be displayed within the **Comments** tab **Note**, all these fields are populated when the Course is created by an administrator.

Should you have any questions in relation to the Course you can contact the administrator by clicking on **Ask a Question** on doing so a message pop-up screen will be displayed as shown in Fig 4.3 below.



RECORD DETAIL

Linked to: **Course**  Send
Course/Conference: **Trauma Response**  Cancel

Subject:

Message:

Fig 4.3 Message pop-up – course

Enter a **Subject** and **Message** then click on **Send**. Another pop-up will display informing you that the message has been sent correctly, click on Ok you are returned to **Course/Conference** details screen.

4.2 Events

There are two ways in which you can search for an Event, from the left-hand menu and from the home screen

There can be multiple Events in a Course. For example if the Course is running over multiple days/weeks or there are different venues doing the same Course etc. You can also register interest in the Course and the system will alert you if/when new events are added to the Course. Useful when there are no spaces left on the current events.

From the **General** menu on the left-hand side select **Events**.

The **Events** screen is displayed.



SEARCH BACK

All available events are displayed in the list below. Browse the full list, search for a course or conference by name or use the filters to tailor the list to show the events which are of interest to you.

Course/Conference: <input type="text"/>	Grade: <input type="text"/>	<input type="button" value="Search"/> <input type="button" value="Clear"/>
Category: <input type="text"/>	Band: <input type="text"/>	
Delegate type: <input type="text"/>	Location: <input type="text"/>	
Start date from: <input type="text"/>	Town/City: <input type="text"/>	
Start date to: <input type="text"/>		

SEARCH RESULTS

Course/Conference	Start date	Venue	Event state
Trauma Response	31 Jul 15	City of Manchester Stadium	Places Available

Fig 4.4 Events screen

From this screen you can:

- Use the search criteria to narrow the results
- Within the search results see a list of the Events available to you
- View a specific Event by clicking on the name within the search results, on doing so the **Events detail** screen will be displayed as shown in Fig 4.5 below

The **Event** details screen is displayed.

EVENT DETAILS BACK

Trauma Response
31 Jul 15

Information

VENUE DETAIL

Date:	31 Jul 15
Start Time:	05:00 PM
End Time:	06:00 PM
Venue:	City of Manchester Stadium
Address:	Rowsley Street Manchester Greater Manchester M11 3FF
Telephone:	NOT SPECIFIED
Site URL:	Link

Go to Google maps

Fig 4.5 Event detail screen



This screen has all the information that you will need to know about the Event. To see all the relevant information click on each tab in-turn to see the following:

- Within the **Date(s)** tab you will be able to see the start and end times along with Venue and contact details
- **Target Audience** as to who this event is designed for
- Event **Requirements** to fulfill before booking
- Any **Documents** associated to the Event
- Book onto the Event, see section 5 for further details
- View relevant **Information**, such as aims and objectives
 - Once clicked on this will download in a PDF format

Note, all these fields are populated when the Event is created by an administrator. Also note that you can only book on to an Event and not on to a Course.

Should you have any questions in relation to the Event you can contact the administrator by clicking on **Ask a Question** on doing so a message pop-up screen will be displayed as shown in Fig 4.6 below.

RECORD DETAIL

Linked to: **Event**  Send
Course/Conference: **Trauma Response**
Course event: **30/07/2015 - 987654**  Cancel

Subject:

Message:

Fig 4.6 Message pop-up - event

Enter a **Subject** and **Message** then click on **Send**. Another pop-up will display informing you that the message has been sent correctly, click on Ok you are returned to **Course/Conference** details screen.



5 Booking on an Event

When you book on to an Event it will give you multiple options depending on what was included when the Course and Event were populated by an administrator.

Follow the steps in section 4.2 and locate the specific Event that you want to book onto.

From the **Event Details** screen click on the **Book Now** Tab.

Book Now tab screen is displayed.

The screenshot shows the 'Book Now' tab selected in a navigation bar. Below the navigation bar is a section titled 'EVENT COSTS'. It lists various cost items with checkboxes and prices:

Item	Price
Standard Event Fee(s)	
Any Delegate type	£50.00
Accommodation	
Holiday Inn, Winchester (04/08/2014)	£45.00
Holiday Inn, Winchester (05/08/2014)	£45.00
Holiday Inn, Winchester (06/08/2014)	£45.00
Holiday Inn, Winchester (07/08/2014)	£45.00
Subsistence	
Lunch (04/08/2014)	£5.00
Other	
Course Material (Literature) (04/08/2014)	£10.00
Parking Permit (04/08/2014) <i>A voucher to allow unlimited parking during the event.</i>	£100.00
Total	£0.00

Below the table is a 'CALCULATE' button. Underneath is a dropdown menu for 'How did you hear about this Course/Conference?'. There is a checkbox for 'By ticking this box, I agree to provide all Requirements and accept the Terms & Conditions and the Cancellation & Refund Policy.' and a 'BOOK' button at the bottom right.

Fig 5.1 Book now screen

Complete the details as follows:

- Click in the tick-box for the the event fees for your delegate type.
 - **Note**, this field may already be ticked depending on your delegate type but the example in Fig 5.1 is for any delegate type
- Select **Accommodation** and **Subsistence** if relevant along with any **Other** items such as, literature for event or permit parking
- You can **Calculate** the Total cost of the Event



- Select from the drop-down as to **how did you hear about this course/conference**
- Confirm that you agree to the **terms & conditions** along with **cancellation & refund policy** **by select the tick-box alongside**

Note, depending on system configuration there may be a option next to **Book** saying **Add to Basket** so that you can add a course to **My Basket** and carry on browsing.



6 Packages

Packages are a number of Events that span a certain period of time. An administrator will create a Package if there are a number of Events that are mandatory in relation to one another i.e. if a delegate needs to book on all of the Events as they are dependent on completing each other, you can book on the Package and this will book all the Events associated for you.

6.1 Viewing Packages

To view Packages from the **General** menu on the left-hand side select **Packages**.

The **Packages** screen is displayed.

SEARCH BACK 

All available packages are displayed in the list below. Browse the full list, search for a package by name or use the filters to tailor the list to show the courses or conferences packages which are of interest to you.

Package:  Search
Delegate types:  Clear

SEARCH RESULTS

Package	Start date
Response T	30-Jul-2015

Fig 6.1 Packages screen

From this screen you can do the following:

- Use the search criteria to narrow results
- See available Packages
- Select and view individual Packages

Once you have located the relevant Package click on the name of the package within the search results.

The **Package Details** screen is displayed.



PACKAGE DETAILS BACK

Response T

ASK A QUESTION

Package information

- DATES
- TARGET AUDIENCE
- REQUIREMENTS
- DOCUMENTS
- BOOK NOW

EVENT DATES

TRAUMA RESPONSE (04 AUG 15 - 05 AUG 15)

VENUE DETAIL

Date: 04 Aug 15

Start Time: 10:00 AM

End Time: 05:00 PM

Venue: Galgorm Resort & Spa

Address: Galgorm Resort & Spa
Fenaghy Road
Ballymena
Antrim
BT42 3RF

Telephone: 028 30 546789

Site URL: [Link](#)



[Go to Google maps](#)

Fig 6.2 Package details screen



TRAUMA RESPONSE (19 AUG 15 - 20 AUG 15)

VENUE DETAIL

Date: 19 Aug 15
Start Time: 09:00 AM
End Time: 04:30 PM
Venue: GPT Office
Address: 1
2
3
St Asaph
Telephone: NOT SPECIFIED
Site URL: [Link](#)



TRAUMA RESPONSE (13 AUG 15 - 14 AUG 15)

VENUE DETAIL

Date: 13 Aug 15
Start Time: 09:00 AM
End Time: 04:00 PM
Venue: Everglades Hotel
Address: Derry
Telephone: NOT SPECIFIED
Site URL: [Link](#)



Fig 6.3 Continuation of package screen

From this screen you can see and do the following:

- Within the **Dates** tab you can see all the Events associated with this Package, giving the date, start and end time along with the venue details
- **Target Audience** as to who this Event is designed for
- Event **Requirements** to fulfill before booking
- Any **Documents** associated to the Event or Course
- **Book** onto associated Events within the Package

Note, all these fields are populated when the Events and subsequent Package is created by an administrator.



Should you have any questions in relation to the Package you can contact the administrator by clicking on **Ask a Question** on doing so a message pop-up screen will be displayed as shown in Fig 6.4 below.

RECORD DETAIL

Linked to: **Package**
Package: **Response T**

Send
Cancel

Subject:

Message:

Fig 6.4 Message pop-up - package

Enter a **Subject** and **Message** then click on **Send**. Another pop-up will display informing you that the message has been sent correctly, click on Ok you are returned to **Package** details screen.

6.2 Booking a Package

Within the **Package detail** screen select the **Book Now** tab.

The **Book Now** screen is displayed.



Package information

Navigation tabs: DATES, TARGET AUDIENCE, REQUIREMENTS, DOCUMENTS, BOOK NOW (highlighted). Below is a bar labeled "EVENT COSTS".

TRAUMA RESPONSE (04 AUG 15 - 05 AUG 15)

Standard Event Fee(s)

All delegates £95.00

Total

TRAUMA RESPONSE (19 AUG 15 - 20 AUG 15)

Standard Event Fee(s)

full fee £80.00

Total

TRAUMA RESPONSE (13 AUG 15 - 14 AUG 15)

Standard Event Fee(s)

Any Delegate type £65.00

Total

TRAUMA RESPONSE (30 JUL 15 - 31 JUL 15)

Standard Event Fee(s)

All delegates £66.00

Fig 6.5 Book now screen

From this screen you can do the following:

- See all available Events within the Package
 - You can view each individual Event in more detail by clicking on the name of the Event in the area outlined in red in Fig 6.5 above, on doing so you will be taken to the Event screen
- Select and book onto the Events by clicking in the tick-box alongside

Once you have selected the relevant Events, scroll to the bottom of the page where you need to confirm your booking as shown in Fig 6.6 below.



How did you hear about this Course/Conference?

- By ticking this box, I agree to provide all Requirements and accept the **Terms & Conditions** and the **Cancellation & Refund Policy**.

ADD TO BASKET

Fig 6.6 Continuation - book now screen

Complete the details as follows:

- Select from the drop-down as to **how did you hear about this Course/Conference**
- Click in the tick-box to accept the **terms and conditions** along with the **cancellation and refund policy**
- Click on **Add to basket**, on doing so you will be taken to **My Basket** screen where you can proceed to the checkout or clear basket, see section 7.1 for further details.



7 Online Payments

If the administrator has set up the online payment functionality against a specific Event, you will be able to book and make relevant payments to complete the booking process. These actions are carried out through the left-hand menu option **My Basket**; see section 7.1 for further details.

7.1 My Basket

If the system administrator has configured the system to allow online payments, once you have selected and booked onto Events those items will be moved to **My Basket**, where you will need to either proceed to checkout or clear your basket to finalise the booking.

To access My Basket from the left-hand **Personal** menu select **My Basket**.

The **My Basket** screen is displayed.



MY BASKET BACK

All bookings currently in your basket are shown below. You can remove individual/all bookings if you wish or proceed to checkout.
Please be aware that if any bookings remain in your basket when you sign out they will automatically be transferred to your 'Cancelled' bookings.

TRAUMA RESPONSE (19 AUG 15 - 20 AUG 15) ☑
Booking reference: 3318 Amount (£): 80.00
Date added: 23 Jul 15

▼ ACCOMMODATION EDIT

▼ ADDITIONAL OPTIONS EDIT

▼ REQUIREMENTS

TRAUMA RESPONSE (04 AUG 15 - 05 AUG 15) ☑
Booking reference: 3317 Amount (£): 95.00
Date added: 23 Jul 15

▼ ACCOMMODATION EDIT

▼ ADDITIONAL OPTIONS EDIT

▼ REQUIREMENTS

Total **£175.00**

Deposit amount **£20.00**

How do you wish to pay?

CHECKOUT CLEAR BASKET

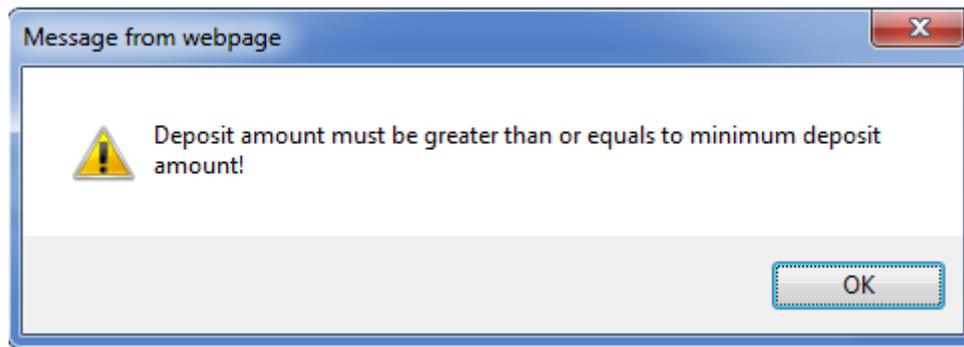
Fig 7.1 My basket

From this screen you can do the following:

- See a breakdown of costs associated with each Event
- Unselect a booked Event
- See your total amount payable and the **Deposit**, see 7.2 for further details
- Proceed to **Checkout** to make payment, see section 7.4 for further details
- **Clear Basket** of selected event bookings, see section 7.3 for further details

7.2 Deposit

If a deposit amount has been specified by the administrator it will be displayed in the area outlined in red in Fig 7.1 above. Should you try and put in a lower amount than the deposit then the following message will be displayed.



You can pay anything over and above the deposit amount but this allows the option to be able to pay in instalments. To make further payments follow the steps in section 7.4.

7.3 Clear Basket

There are two ways in which you can clear your basket, either through the My Basket screen or when you sign-out of CBMS.

From within **My Basket** screen scroll to the bottom of the page.

To clear your basket of bookings select **Clear Basket**. The following message is displayed:

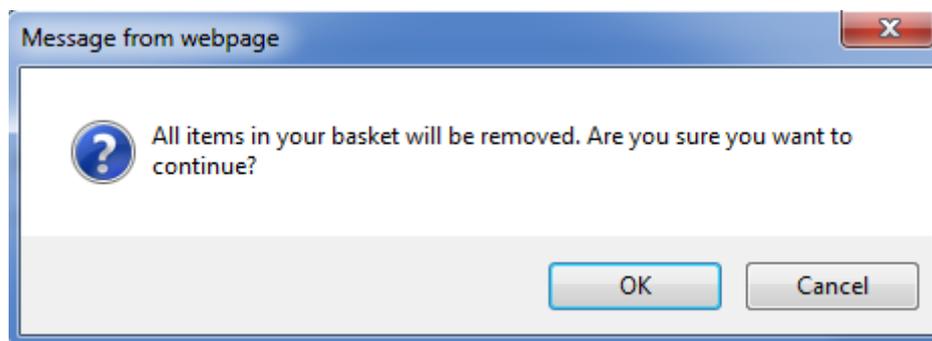


Fig 7.2 Confirmation message when removing basket items

Click on **OK**

You are returned to **My basket** screen where all bookings have been removed as shown in Fig 7.3 below.



There are currently no items in your basket

Fig 7.3 Clear basket

Note, you can also individually deselect any of the Events by unticking them in the basket screen. That will take them out of the total amount to be paid.



The second way to clear your basket is to click on **Sign Out** within the **General** left-hand menu.

The following message is displayed:

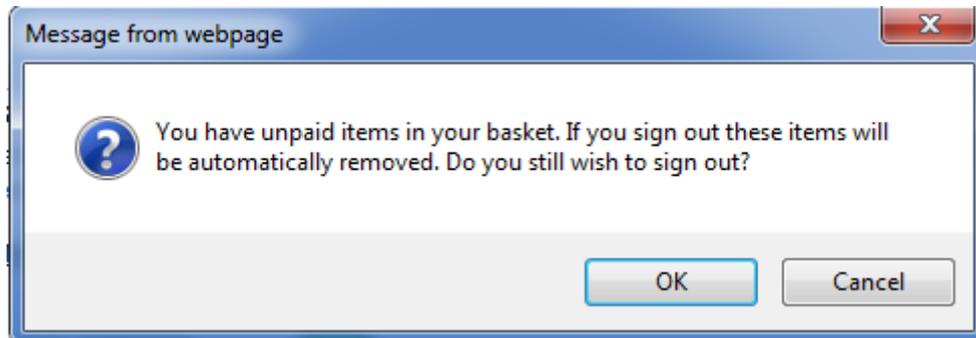


Fig 7.4 Confirmation message when signing out with unpaid items

Click on **OK**

You are returned to the **CBMS login** screen and all items in your basket will be removed.

7.4 Checkout

There are two online payment types. The first one is Debit Cards. This will have no effect on the total amount in your basket and will pay for just your events and options. The second is Credit Cards. When this option is selected an additional line of text will appear warning you that extra charges will be applied to your total, as shown in Fig 7.5 below. These charges are 2.9% + 20p. This will then automatically update the total.

From the **My Basket** screen once selections have been made scroll to the bottom of the page where you will see the **How do you wish to pay** drop-down, as shown in Fig 7.5 below.



Fig 7.5 Credit card payment option

Note, if you select Credit Card as your payment method then you will need to click in the tick-box to agree with the extra charges.

Click on **Checkout**

The **Payment method** screen is displayed.



Multiple Course Booking
BookingReference(s): 3318,3317

Choose one of the following payment methods:



Fig 7.6 Payment method screen

Select the preferred payment method.

The **personal payment** details screen is displayed.

Multiple Course Booking
BookingReference(s): 3318,3317
Fields marked with (*) are mandatory

Payment reference number	2193be02-3dd1-4305-8fe6-fdfa31ccec8c
Amount to pay	GBP 20.00
Payment with	Visa
Card number *	<input type="text" value="111222111222"/>
Card expiry date (MM/YYYY) *	<input type="text" value="01"/> / <input type="text" value="2016"/>
Name card holder *	<input type="text" value="Mr Smith"/>

The payment will be authorised online. This process will take approximately 15 seconds.



Fig 7.7 Personal payment details

Enter the card details then click on **Make Payment**.

Once payment details are completed and submitted there are a number of screens that you can be redirected to in CBMS.

If there was an issue with the payment you will see Fig 7.8 below.



Unfortunately your payment has been declined.
You may attempt to pay for the event again via the shopping basket.

Fig 7.8 Booking declined

Click on **Back**

If the payment goes through, then the booking acknowledgement screen is displayed, as shown in Fig 7.9 below.



BOOKING ACKNOWLEDGEMENT

BACK 

Thank you for booking via the Course Booking Management System (CBMS). Your payment has been accepted. Please see below for your booking details. A Booking Acknowledgement will also be sent to you via email.

The Event Co-ordinator will contact you shortly regarding your booking. If you wish to speak to someone prior to this please contact us on the phone number shown at the top of this screen.



Download PDF

ALEX'S AWESOME CBMS TRAINING (16 JAN 15)

Booking reference: 3164

Booking date: 12 Jan 15

Event fee (£): 100.00

Total cost (£): 100.00

▼ [VIEW REQUIREMENTS](#)

Fig 7.9 Booking acknowledgement

You will also receive an email to confirm the payment and details.



8 Administration of Delegate Account

From the CBMS Home screen under the **Personal** left-hand menu you will see a list of options available to you, which will enable you to manage your account and bookings.

8.1 My Account

This is where you can change your email address and password.

8.1.1 Changing your Email Address

From the **Personal** menu on the left-hand side select **My Account**.

The **Account Credentials** screen is displayed.

ACCOUNT CREDENTIALS BACK

To change your email address or password, please click on the respective link below.

Email address: [→ Change Email Address](#)

Password: [→ Change Password](#)

Fig 8.1 Account credentials

To change or amend your Email address, click on the link **Change Email Address**.

The **Change Email Address** screen is displayed.

CHANGE EMAIL ADDRESS SAVE

Please note that we will communicate with you via email. You should provide a secure and **individual** email address which you check regularly.

Current email address: Delegate@example.com

New email address:

Confirm email address:

Fig 8.2 Change email address screen

Complete the details as follows:

- Enter and **Confirm** your email address
- Click on **Save**.

A pop-up will display advising that your email address has been changed successfully, click on ok.

You are return to the **Account Credentials** screen.



8.1.2 Changing your Password

From the **Personal** menu on the left-hand side select **My Account**.

The **Account Credentials** screen is displayed.

ACCOUNT CREDENTIALS BACK

To change your email address or password, please click on the respective link below.

Email address: [→ Change Email Address](#)

Password: [→ Change Password](#)

Fig 8.3 Account credentials

To change or amend your Password, click on the link **Change Password**.

The Change **Password** screen is displayed.

CHANGE PASSWORD SAVE

Your password must be at least six characters and contain at least one number.
Please note that passwords are case sensitive.

Current password:

New password:

Confirm password:

Fig 8.4 Change password screen

Complete the details as follows:

- Enter your **Current password**, **New password** and then **Confirm**
- Click on **Save**

A pop-up will display advising that your password has been changed successfully, click on **OK**.

You are return to the **Account Credentials** screen.

8.2 My Personal Details

This is where you can make amendments to your personal details.

From the **Personal** menu on the left-hand side select **My Personal Details**.

The **Personal Details** screen is displayed.



PERSONAL DETAILS

Please update your personal details using the form below.

Wessex or Oxford Deanery trainees/Educational Supervisors

If you are a Wessex or Oxford Deanery trainee or a Wessex Deanery Educational Supervisor your details should be automatically populated with information from your secure Deanery 'Intrepid' database record.

If you did not register with the correct email address which is held on your Deanery Intrepid database record your details will not have automatically populated and the system will not recognise you as a Wessex or Oxford Deanery trainee or Wessex Deanery Educational Supervisor.

If you find any information missing, incorrect or you wish to amend the email address that is held on your Deanery Intrepid database record, please contact 01962 718501 and we will make/request the necessary changes for you.

* **Mandatory fields are shown in bold**

Are you a Clinician?:	<input checked="" type="checkbox"/>	 Save & Back
Delegate type:	Trainee	 Cancel
Job title:	<input type="text" value="Trainee Dr"/>	
Surname:	<input type="text" value="Trainee"/>	Address type: <input type="text" value="Home"/>
Forenames:	<input type="text" value="One"/>	Address 1: <input type="text" value="The house"/>
Known as (forename):	<input type="text"/>	Address 2: <input type="text" value="Brook street"/>
Sex:	<input type="text" value="Male"/>	Address 3: <input type="text"/>
Date of birth (dd/mm/yyyy):	<input type="text" value="20/02/1980"/>	Post town: <input type="text" value="ALDERSHOT"/>
Telephone:	<input type="text" value="022 2555 48887"/>	County: <input type="text" value="hampshire"/>
		Post code: <input type="text" value="GA12 B45"/> <input type="button" value="SEARCH"/>
Specialty:	<input type="text" value="ACCS - Emergency Medicine"/>	Registration type: <input type="text" value="GMC"/>
Performer number:	<input type="text"/>	Registration number: <input type="text"/>
		(If you are a trainee please enter N/A)
Dietary requirements:	<input type="text"/>	
Personal biography:	<input type="text"/>	

Fig 8.5 Personal details screen

From this screen you can make changes to your **name, job title, address, specialty, dietary requirements** and **personal biography**.

To return to the Home screen without making any changes click on **Cancel** and if changes have been made then click on **Save & Back**.

You are returned to the **CBMS Home** screen.

Note, you cannot change your delegate type as that is your job role.

8.3 My Courses/Conferences

This section contains a list of your courses or events that you have ever booked on.



From the **Personal** menu on the left-hand side select **My Courses/Conferences**.

The **Courses/Conferences** screen is displayed.

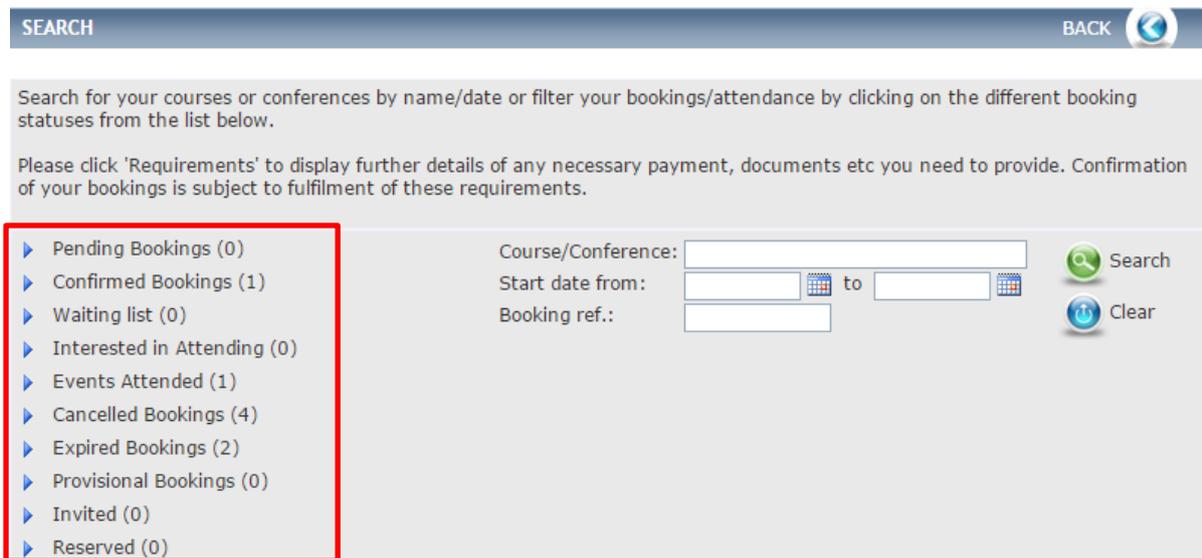


Fig 8.6 Your courses/conferences screen

The first section of this screen allows you to see an overview of your bookings in the area outlined in red in Fig 8.6 above and search for a specific booking using the search criteria.

The rest of the screen will display a list of your current bookings as shown in Fig 8.7 below.



SEARCH RESULTS

▶ **TRAUMA RESPONSE (26 MAY 15 - 28 MAY 15)** **VENUE(S)**

Booking reference: 3302
Booking status: **Expired**
Booking date: 21 May 15
Online booking: ✓

▼ DOCUMENTS **PROGRAMME**

▶ **TRAUMA RESPONSE (26 MAY 15 - 28 MAY 15)** **VENUE(S)**

Booking reference: 3301
Booking status: **Cancelled**
Booking date: 21 May 15
Paid: ✗
Paid date:
Online booking: ✓
Refund/Transfer: ✗
Refund/Transfer date:
Refund/Transfer amount:

Event fee (£): 100.00
Total cost (£): 194.00
Cancelled date:

▼ ACCOMMODATION **PROGRAMME**

▼ ADDITIONAL OPTIONS

▼ REQUIREMENTS

▼ DOCUMENTS

Fig 8.7 Your bookings

From this screen you can do the following:

- See an overview of the Event along with all other available options such as, **accommodation**, **requirement** and **documents** associated with the Event
- Click on **Programme**, on doing so it will download a PDF document with the Event itinerary
- Click on **Venue** to see details of where the Event is being held

8.4 My Requirements

This section will show you what Requirements are outstanding from you.

For example, a delegate who is looking to book on this Course must have an educational supervisor approval form and or personal supporting evidence.

From the **Personal** menu on the left-hand side select **My Requirements**.

The **Requirements** screen is displayed.



SEARCH
BACK

Please make sure you have fulfilled all the requirements to confirm your place on the events.

Course/Conference:

Booking status:

Search

Clear

SEARCH RESULTS

Trauma Response (26 May 15 - 28 May 15) - Expired

Confirmation of your booking is subject to fulfilment of the following event requirement(s).

Requirement	Received	Due date
Must be a trainee in East Midlands (not LAS)	✘	22/05/2015
Educational Supervisor Approval form	✘	
Personal supporting evidence required	✘	

Trauma Response (20 May 15 - 21 May 15) - Expired

Confirmation of your booking is subject to fulfilment of the following event requirement(s).

Requirement	Received	Due date
Educational Supervisor Approval form	✘	
Personal supporting evidence required	✘	

Fig 8.8 Requirements screen

From this screen you can do the following:

- Use the search criteria to narrow results
- See the specific details of the Requirements, the due date and if it has been received by the administrator

Note, you cannot submit Requirements to the administrator via CBMS this will need to be done via other means. Should you have any questions in relation to the requirements then you can contact the administrator by selecting Ask a Question from the events detail screen see section 4.2 for further details.

8.5 My Course Evaluations

If the system administrator has aligned a specific Evaluation in relation to the Course or Event for you to complete it will be displayed within the My Course Evaluations section.

From the **Personal** menu on the left-hand side select **My Evaluations**.

The **Evaluations** screen is displayed.



Name	Date sent	Due date	Completed on
→ Test Evaluation	24/07/2015	24/07/2015	

Fig 8.9 My evaluations

From this screen you can do the following:

- Use the search criteria to narrow results
- See your Evaluations that are yet to be submitted
- View and complete outstanding Evaluations

To view and complete a specific Evaluation, click on the arrow-icon alongside.

The **Evaluation** screen is displayed.

Did the course cover the relevent topic?

Yes

No

Partialy

Next

SUBMIT

Fig 8.10 Evaluation screen

Once you have completed the Evaluation click on **Submit**.

You are returned to the **Evaluations** screen.



8.6 My CPD Calculator

This section shows total of hours/points you have accumulated. Each course or event will have CPD hours/points set by the administrator and will build up as you do more.

From the **Personal** menu on the left-hand side select **My CPD Calculator**.

The **CPD Calculator** screen is displayed.

SEARCH BACK

Use the calculator to check how many CPD hours and CPD points you have attained.

Date from: to

Search
 Clear

CPD HOURS

No results found

CPD POINTS

No results found

Fig 8.11 CPD calculator screen

From this screen you can do the following:

- Use the search criteria to narrow results
- See all your accumulated **CPD Hours** and **Points**

8.7 My Certificates

This section is where you can view any certificate(s) that have been issued to you after attending an event.

From the **Personal** menu on the left-hand side, select **My Certificates**.

The **Certificates** screen is displayed.

SEARCH BACK

All of your certificates are listed below. Simply click on the icon to view the certificate as a PDF and then either save it or print it.

Course:

Search
 Clear

SEARCH RESULTS

Course/Conference	CERTIFICATE
Trauma Response (26 May 15 - 28 May 15)	

Fig 8.12 My certificates screen



From this screen you can do the following:

- Use the search criteria to narrow results
- See all Certificates that have been issued to you
- Select and view a specific Certificate

To select and view a specific certificate, click **Certificate** alongside the relevant one within the Search Results.

8.8 My Basket

When booking on Events it will give you the option to add to your basket so that you can pay at another time.

From the **Personal** menu on the left-hand side select **My Basket**.

The **My Basket** screen is displayed.



There are currently no items in your basket

Fig 8.13 My basket screen

From this screen you can finalise your bookings see section 7.1 for further details.

8.9 My Messages

Any Messages you may have regarding new events that you have expressed an interest in or any other correspondence with regards to an Event, Course or Package will appear here.

From the **Personal** menu on the left-hand side select **My Messages**.

The **Messages** screen is displayed.



SEARCH BACK

Subject: Show deleted: Search

Sent to: Course/Conference: Clear

Sent date from: to: Course event:

Received from: Message read:

Received date from: to:

RECEIVED

No results found

SENT

<u>Subject</u>	<u>Linked to</u>	<u>Date</u>	<u>Status</u>
can you tell me	Course	17/07/2015	

Fig 8.14 My messages screen

From this screen you can do the following:

- Use the search criteria to find a specific Message
- See all messages **Received** and **Sent**
- View a specific Message by clicking on the blue-arrow icon alongside, this will open up the **Message detail** screen as shown in Fig 2.1 below

RECORD DETAIL

To: **Master. Hicom** Back

Sent date: **17/07/2015 14:47:00**

Linked to: **Course** Delete

Course/Conference: **Trauma Response** Reply

Subject: can you tell me

Message:

MESSAGE HISTORY

<u>Subject</u>	<u>Linked to</u>	<u>To</u>	<u>From</u>	<u>Date</u>
can you tell me	Course	Hicom Master		17/07/2015

Fig 8.15 Message details screen

From this screen you can do the following:

- View the Message details
- **Delete** the Message
- **Reply** to the Message, on selecting reply the Message template is displayed in Fig 8.16 below.



RECORD DETAIL

Linked to: **Course**
Course/Conference: **Trauma Response**

 Send
 Cancel

Subject:

Message:

Fig 8.16 Message template

Enter the **Subject** and **Message** and click **Send** or **Cancel** to return to the **Message detail** screen.



9 Other Features

[About Us](#) | [Contact Us](#) | [Feedback](#) | [FAQs](#) | [Terms & Conditions](#) | [Cancellation & Refund Policy](#) | [Data Protection](#)

About Us: This info is administrated by the administrators and just provides info of your deanery, organisation etc.

Contact Us: Details of administrators and how to contact them.

Feedback: This is where you would log any complaints, praise or feedback that you may have about the system. This will go to your administrators and then, if required, will feed back to Hicom Technology.

FAQs: Frequently asked questions with answers as to what to do if...

Terms & Conditions: Terms & Conditions of use of the application.

Cancellation & Refund Policy: How to request a refund if you have paid for a course or event and then cannot make it.

Data Protection: How any data that is input in to the system is protected.



10 Document Revision History

Version	Date	Sections changed	Comments
V2.00	24/07/2015	Document created	
V2.01	11/08/2015	Document restyled, and minor amends throughout	