

Edsential Website Guide for School & Business Users

The Edsential website has been designed for customers, whether members of staff in education settings or parents, to book training and purchase products.

We hope the website is largely intuitive and we are endeavoring to make it so but we appreciate that technology can sometimes be more complex than we would like. This guide hopefully provides a quick oversight to the way we think our education setting based customers may use the site. We always value customer feedback which can be provided by emailing hello@edsential.co.uk

Registering An Account

Anybody can create an account by selecting the Register button in the top red bar.



The registration process allows you select the kind of customer you are.

Please choose what type of user you are from the options below:

Supply Teacher, Parent, Carer	School Staff Member	Governor
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When School Staff Member or Governor are selected the registration form will provide a list of our current customers set up on the website settings. If their setting is not there they can register a new school. When completing the form you will be asked whether you wanted to be invoiced and we will send you a customer form to complete.

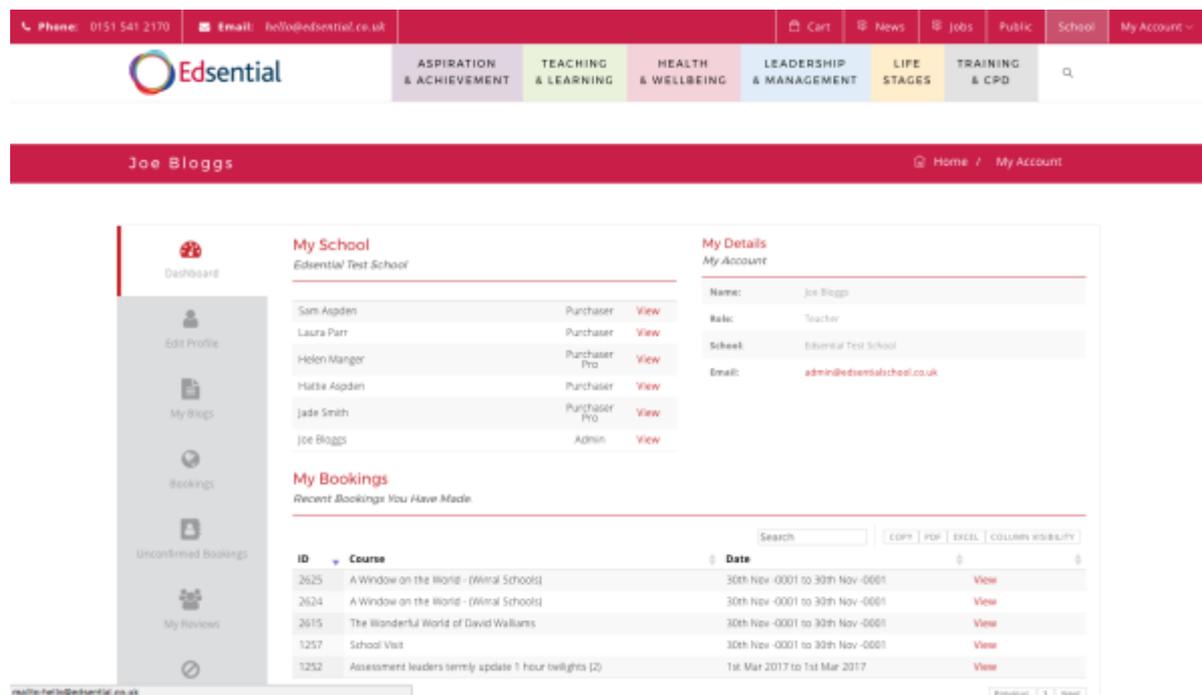
Once a new user has registered they can book training or purchase a product immediately using a credit or debit card via SagePay.

Each of our existing customers will have a nominated admin account which they have used to purchase with previously. When a user makes a booking the Admin will be notified by email that a booking has been made by the user and they have the opportunity to:

1. Confirm the booking

2. Cancel the booking.
3. Delete the user if they are not a member of your school

The Admin View



The screenshot shows the Edsential Admin View for user Joe Bloggs. The dashboard includes a navigation menu on the left with options like 'Edit Profile', 'My Bookings', 'Bookings', 'Unconfirmed Bookings', and 'My Reviews'. The main content area is divided into three sections: 'My School' (listing staff members and their roles), 'My Bookings' (a table of recent bookings), and 'My Details' (user profile information).

ID	Course	Date	Action
2625	A Window on the World - (Wimal Schools)	30th Nov -0001 to 30th Nov -0001	View
2624	A Window on the World - (Wimal Schools)	30th Nov -0001 to 30th Nov -0001	View
2615	The Wonderful World of David Walliams	30th Nov -0001 to 30th Nov -0001	View
1257	School Visit	30th Nov -0001 to 30th Nov -0001	View
1252	Assessment leaders termly update 1 hour twilights (2)	1st Mar 2017 to 1st Mar 2017	View

We have introduced a new admin dashboard which has a number of elements that can be accessed by the grey bar on the left of the page.

The initial dashboard gives an overview of who is in the school and the bookings the admin account has made.

Each user has a permission setting, which is as follows:

Purchaser (most members of staff)	A purchaser can book courses and buy products but needs to be approved by the admin if the booking is by invoice or pay for them using a credit or debit card.
Purchaser Pro (Members of staff who can approve their own bookings i.e. SMT)	A purchaser pro can book courses and buy products. Either credit / debit cards or invoices can be used. Invoice bookings are approved automatically.
Admin	An admin account manages the users and can make bookings and purchases as above. They can also approve bookings and purchases made by a Purchaser account. They can change the permission levels of other users

No Access (user doesn't belong to the school)	User can not access the school account. You could delete them (
Read Only	You provide read only access for members of staff who want to access their information, perhaps after leaving the school but still want access to their CPD record.

The admin account is able to manage the other accounts within school. They will do this by selecting *View* next to each user's name.

Sam Aspden Purchaser [View](#)

When you select *View* the Dashboard page changes. The admin (Joe Bloggs) has selected Sam. The name in the red bar has changed from Joe to Sam.

Sam Aspden Home / My Account

Dashboard

- Edit Profile
- Bookings
- Unconfirmed

My School
Edsential Test School

Sam Aspden	Purchaser	View
Laura Parr	Purchaser	View
Helen Manger	Purchaser Pro	View
Hattie Aspden	Purchaser	View
Jade Smith	Purchaser Pro	View
Joe Bloggs	Admin	View

My Details
My Account

Name: Sam Aspden

Role: Assistant

School: Edsential Test School

Email: mark.aspden@qualitylearning-partners.co.uk

The admin users then can select *Edit Profile*. All the details for that user, that they entered at Registration appear. The Permission Level can then be edited as described in the table above.

Dashboard

Edit Profile

Bookings

Unconfirmed

Bookings

Personal Information

Email:

First Name:

Last Name:

Schools:

Role:

Permission Level:

- no access
- read only
- ✓ purchaser
- purchaser pro
- admin
- super admin

Contact Information

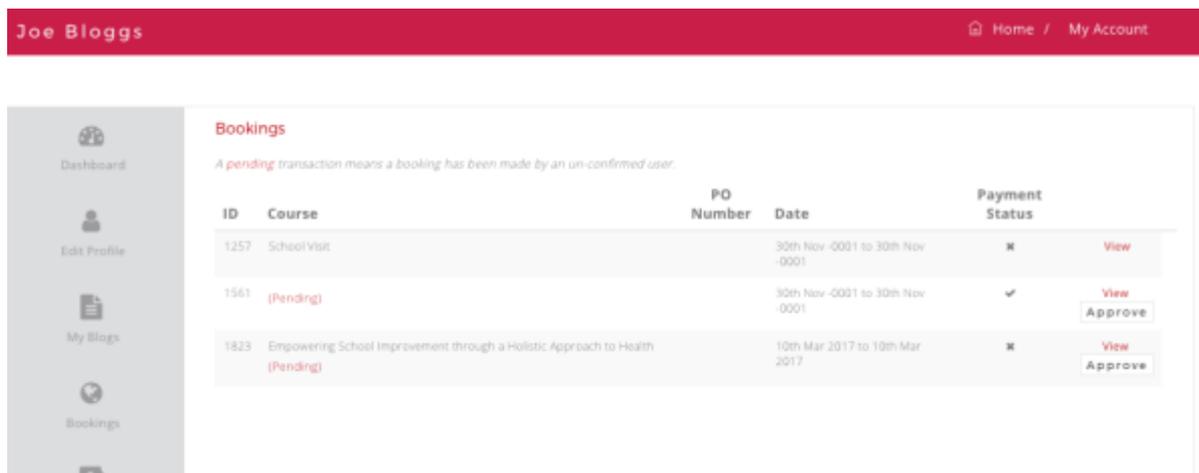
Select Update Profile to make the changes.

Update Profile



When the admin selects a User's bookings they can see the bookings that user has made. In *Unconfirmed bookings* they can any bookings the user has made but needs to be approved.

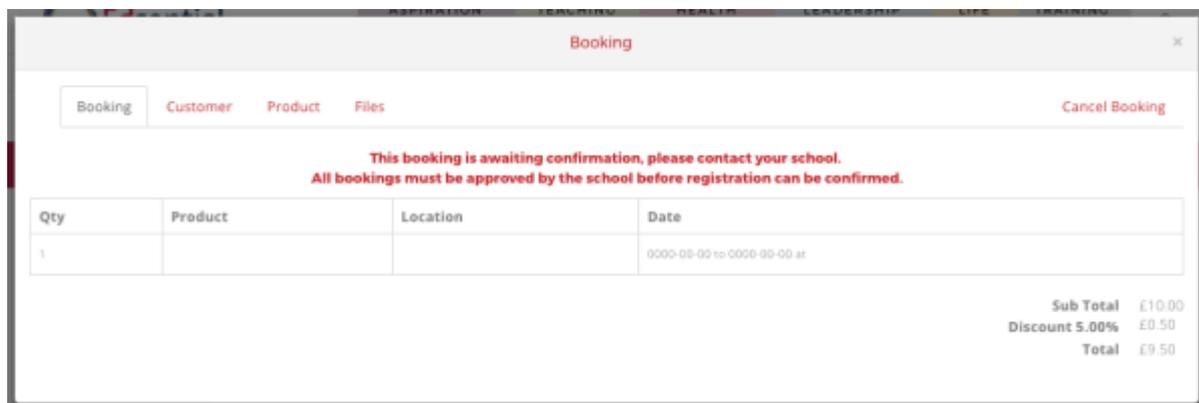
To approve bookings the admin needs to select *Dashboard* and view the admin account. There is a subtle change in the grey bar with more options which are school based. For ease the admin will see *My School Bookings* which lists bookings all users have made for the school.



The screenshot shows the 'Bookings' section of the Edsential dashboard for user 'Joe Bloggs'. A red navigation bar at the top contains 'Home / My Account'. A left sidebar lists 'Dashboard', 'Edit Profile', 'My Blogs', and 'Bookings'. The main content area is titled 'Bookings' and includes a note: 'A pending transaction means a booking has been made by an un-confirmed user'. Below this is a table with columns: ID, Course, PO Number, Date, and Payment Status.

ID	Course	PO Number	Date	Payment Status
1257	School Visit		30th Nov -0001 to 30th Nov -0001	✘ View
1561	(Pending)		30th Nov -0001 to 30th Nov -0001	✔ View Approve
1823	Empowering School Improvement through a Holistic Approach to Health (Pending)		10th Mar 2017 to 10th Mar 2017	✘ View Approve

The admin can approve or view the booking and, if required, cancel it.



The screenshot shows a 'Booking' modal window with tabs for 'Booking', 'Customer', 'Product', and 'Files'. A 'Cancel Booking' link is in the top right. A red warning message states: 'This booking is awaiting confirmation, please contact your school. All bookings must be approved by the school before registration can be confirmed.' Below this is a table with columns: Qty, Product, Location, and Date.

Qty	Product	Location	Date
1			0000-00-00 to 0000-00-00 at

Summary table:

Sub Total	£10.00
Discount 5.00%	£0.50
Total	£9.50

Training can only be cancelled with more than a fortnight's notice as defined in our terms and conditions.



When viewing the admin profile other features that can be accessed are:

My School – lists all the different members of staff and the school information.

My School			My School	
<i>Staff List</i>			<i>Edsential Test School</i>	
Sam Aspden	View	✘	DFE Number:	8750000
Laura Parr	View	✘	Sector:	Nursery, Primary, Pupil Referral Unit, Secondary, Special
Helen Manger	View	✘	Telephone:	0845 557 6315
Hattie Aspden	View	✘	Address:	Whitby Hall Lodge, Ellesmere Port, CH65 6QY
Jade Smith	View	✘		
Joe Bloggs	View	✘		

Users can be deleted here by selecting the red x. They will be archived.

Reviews – each product or course can be reviewed by the user. School reviews can be viewed here.

Account – Shows the draw down account that some schools opted into last year.

School Subscriptions – Lists the service level agreements and subscriptions that your school is a part of.

School Uploads – Lists all the files that we have provided to schools either linked to products or services. For example if you purchase our data package you should find your files here.