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

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

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:

<table>
<thead>
<tr>
<th>User Role</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchaser (most members of staff)</td>
<td>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.</td>
</tr>
<tr>
<td>Purchaser Pro (Members of staff who can approve their own bookings i.e. SMT)</td>
<td>A purchaser pro can book courses and buy products. Either credit / debit cards or invoices can be used. Invoice bookings are approved automatically.</td>
</tr>
<tr>
<td>Admin</td>
<td>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</td>
</tr>
</tbody>
</table>
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.

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.

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.

Select Update Profile to make the changes.
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 admin can approve or view the booking and, if required, cancel it.

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.

<table>
<thead>
<tr>
<th>Staff List</th>
<th>View</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sam Aspden</td>
<td>View</td>
<td>x</td>
</tr>
<tr>
<td>Laura Port</td>
<td>View</td>
<td>x</td>
</tr>
<tr>
<td>Helen Manger</td>
<td>View</td>
<td>x</td>
</tr>
<tr>
<td>Hazel Aspden</td>
<td>View</td>
<td>x</td>
</tr>
<tr>
<td>Jude Smith</td>
<td>View</td>
<td>x</td>
</tr>
<tr>
<td>Joe Bragg</td>
<td>View</td>
<td>x</td>
</tr>
</tbody>
</table>

**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.