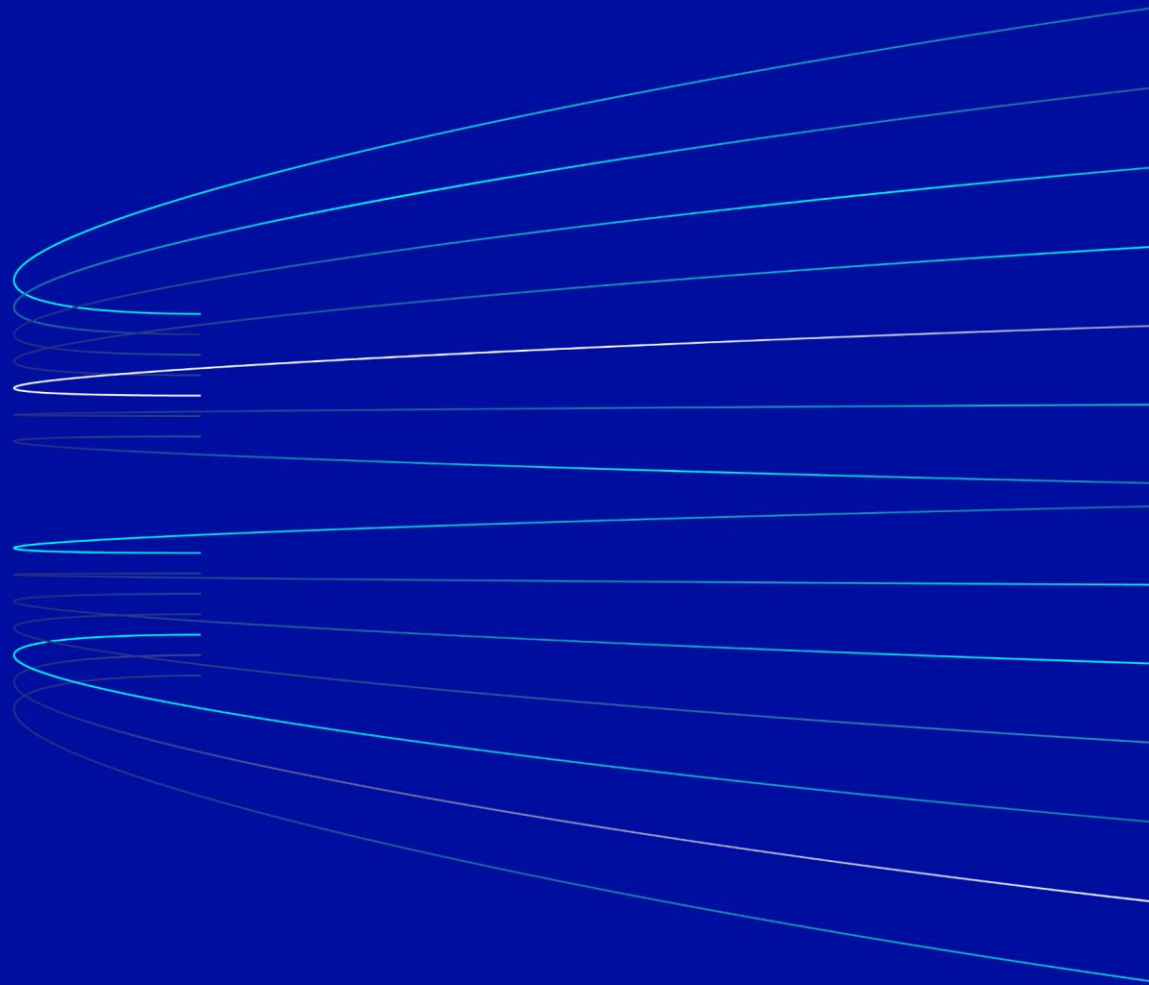


Transform TMS User Guide (Delegate)





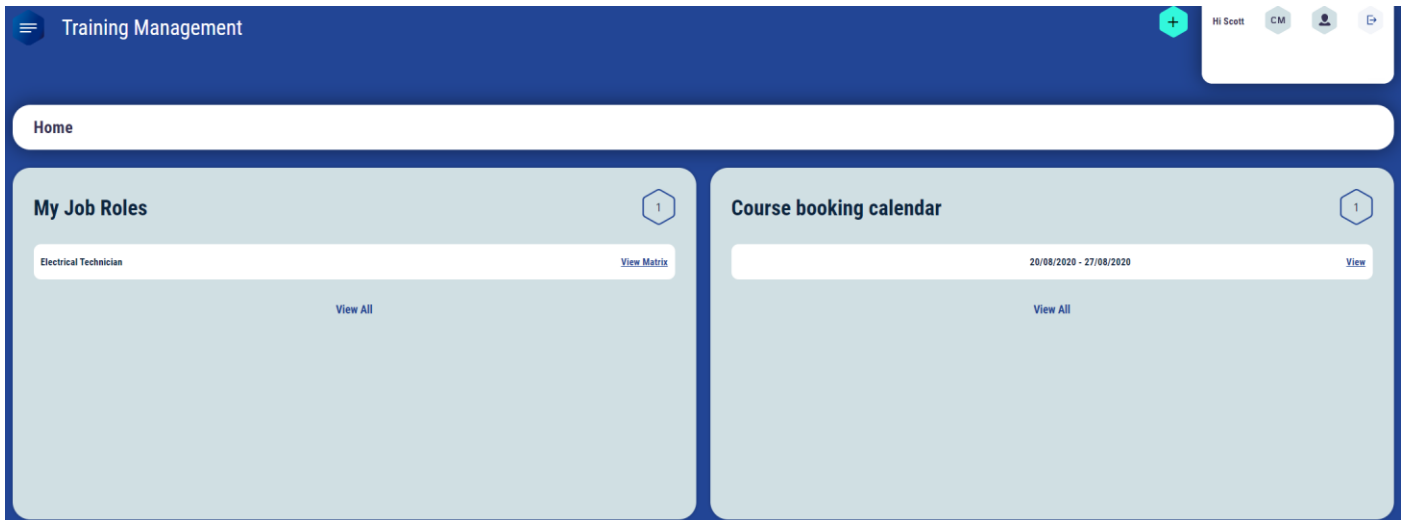
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1. Overview

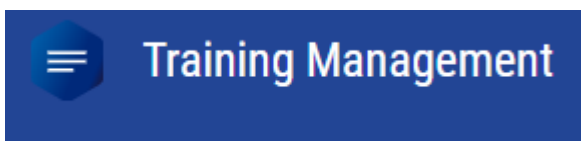
Welcome to the user guide for using the TMS, when you first login to the TMS you will see your dashboard which what is displayed in the screenshot below:



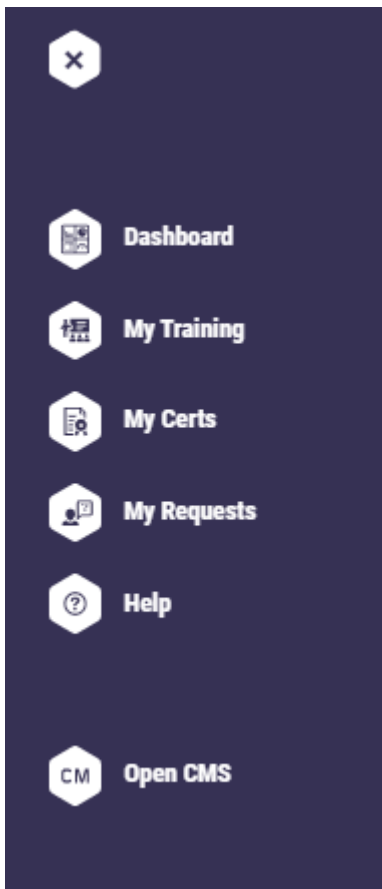
This is the page you will always see first when you log into the TMS.

2. Menu

At the top left corner of the page next to 'Training Management' you will see this button as shown below:



Once you click this button you will see a side menu appear like so



We will go through each one individually and in more depth.

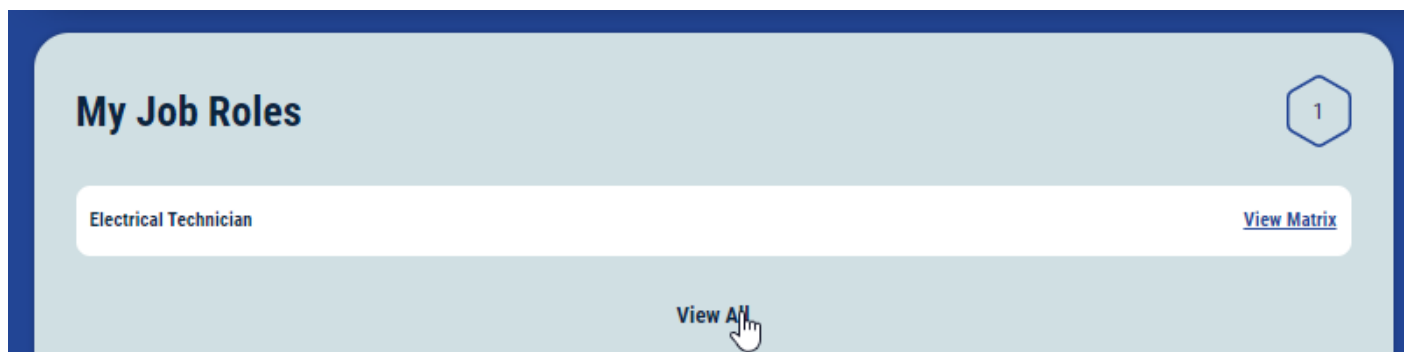


3. Dashboard

The dashboard works essentially as an overview of your profile. Think of it as your own homepage. It is divided into further sections in which we will go through.

3.1. My Job Roles

My Job Roles is very self-explanatory, depending on how many assigned job roles you have, they will be listed in this section.



3.2. Course Booking Calendar

With each job role comes courses in which you will have to undertake, ones that have already been booked will appear here.





3.3. Courses I need to Book

Depending on your role, there will be specific courses you will have to attend and book, this section here will show you which courses you need to book and when to book them by as shown by the “Book before” field.

Courses I need to book

29

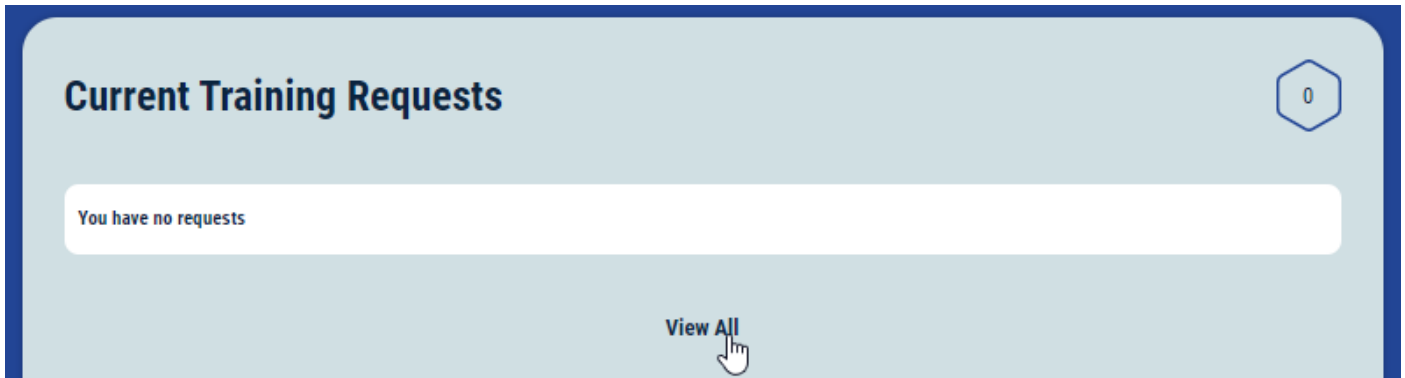
Example Course 1	Book Before 29/12/2018	Book
Example Course 2	Book Before 30/12/2018	Book
Example Course 3	Book Before 31/12/2018	Book
Example Course 4	Book Before 31/12/2018	Book
Example Course 5	Book Before 31/12/2018	Book

[View All](#)



3.4. Current Training Requests

This section will show the requests that have been raised for your training, whenever you have requests, this section here will populate.



3.5. Re-Certs

The Re-Cert section is where your certs you have already are due to expire, some certs can have an expiry date on them, so when they are due to be booked or expire, they will appear in this section here.





4. My Training

This is where you will be able to see your matrix, your courses, current booking and Recerts.



4.1 My Matrix

Each job role you have comes with a matrix, and within that matrix are the courses required to do that job. As you can see from the screenshots below, everything you need to know or do is displayed and any courses that you need to book will display “To Book” and will also show a date to “Book Before”.

Overall Compliance 0%		Client Training Matrix		0%
Booked	Example Booked Course	Booking Number(s): EBC- EC-12345	ACTIONS	
To Book	Example 'To Book' Course	Authorised To Book	ACTIONS	
To Book	Example 'To Book' Course	Authorised To Book	ACTIONS	



4.2 Courses to Book

This section is very self-explanatory, these are the courses relevant to your job role that need to be booked. They will let you know if you are 'Authorised to Book' and if the course has already been booked it will display when the course has been 'Booked for (Date)'

Training > Courses To Book

Priority Courses you need to book

Authorised To Book	Example Booked Course	Booked for 20/08/2020	ACTIONS
Authorised To Book	Example Course To Book		ACTIONS
Authorised To Book	Example Course To Book		ACTIONS

4.3 Current Bookings

The current booking is very self-explanatory. What courses you have booked will appear in this section here, there is also more information regarding your booking such as the location and whether accommodation was required.

Training > Current Bookings

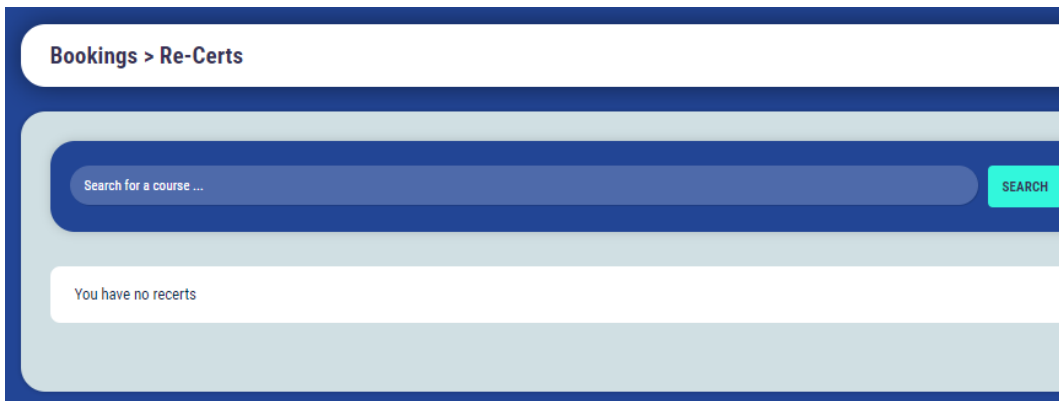
August 20 2020

Example Current Booking 20/08/2020 00:00 - 27/08/2020 00:00	Booking Ref	Attended? : Not set Passed? : Not Set	Location: Example Location No Hotel	Date change requested (Pending)	ACTIONS
--	-------------	--	-------------------------------------	------------------------------------	---------



4.4 Re-Certs

The re-cert section will display all expiring certs you have including the date and the name of the cert that is due to expiry.



5. My Certs

Here you can see the Certs section in more details such as the name of the course and the date they were passed.



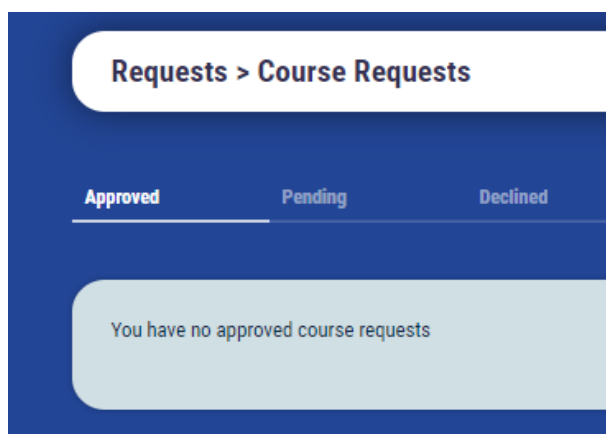


6. My Requests

Within the request section you can send a request for a course, a change of date or cancellation.

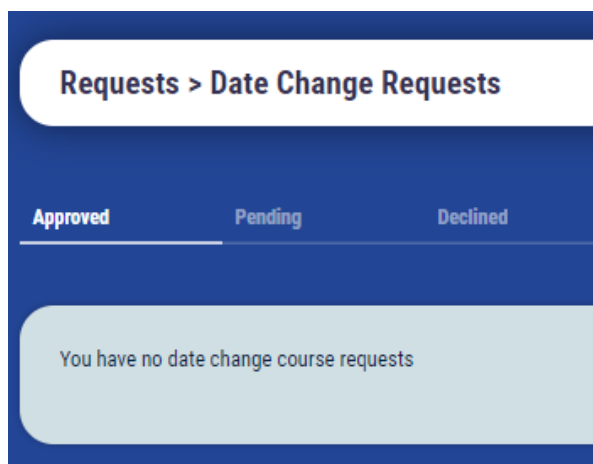
6.1 Course Requests

In this section you will be able to see the courses you have requested, you can see which have been approved, which are still pending and haven't been looked at yet, and declined with a reason why the request was declined.



6.2 Date Change Requests

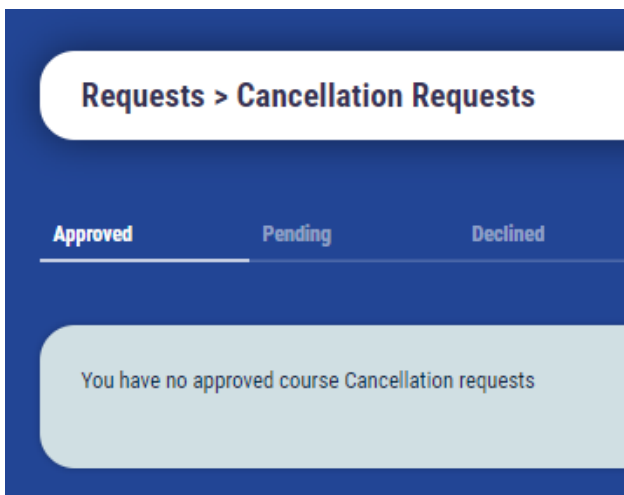
When you have a booking that you need to change the date for, the request will be here. You can see whether they were approved, declined or if they are still pending.





6.3 Cancellation Requests

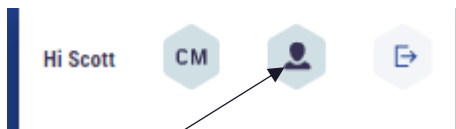
Very similar to the course request section however within this section these are the course cancellation requests, again which have been approved, which are still pending, and which have been declined, again which will have a reason.





7. My Account

In the top right corner of the page you will see the following:



If select this icon it will take you to your account settings and display the page below:

Account

Your Stats Email : delegate@email.com Correspondence Email : Phone : Registered : 13/08/2020 (0 days ago)	Reset Password Existing Password * <input type="password"/> New Password * <input type="password"/> Repeat New Password * <input type="password"/> <input type="button" value="RESET PASSWORD"/>
--	---

From here you can reset your password and see your stats such as what your email/login in, what phone number you have registered and that date you we're registered on the TMS.

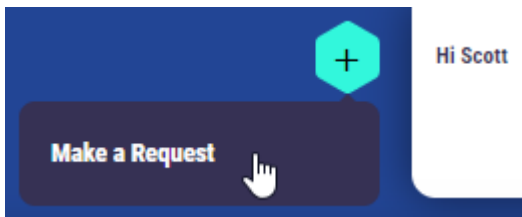
If we look at the selection again



This icon will log you out of the TMS

8. Make a Request

In the Top right corner of the page you will see a Plus + symbol



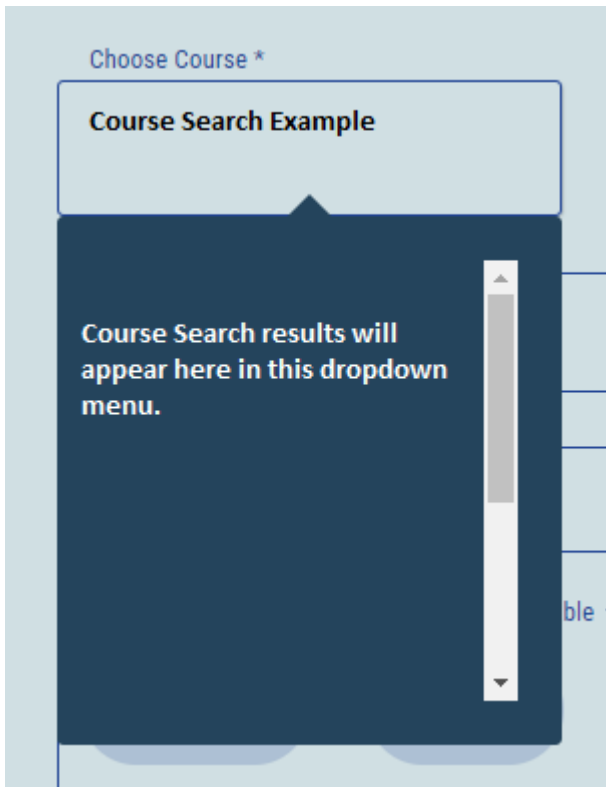
From here you can make a request for a course/training, when you select this option you will be presented with the screen below:

Any field marked with an * is a mandatory field, information must be entered.



9.1 Request a Course

Choose Course* is a search box which gives results base on the course you are searching



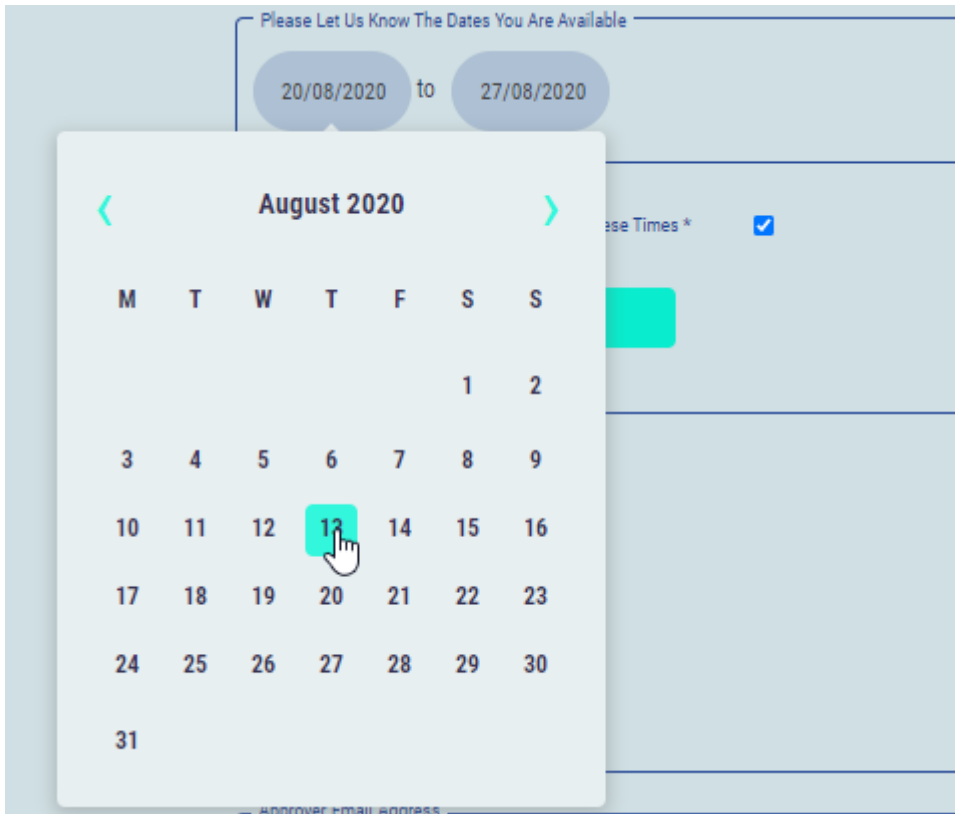
You can select the course you need from this drop down.

If this course requires approval a message will appear on the form like below:

This course needs to be approved before booking can be confirmed



You can select the dates you are available in the calendar and these will appear as shown below when you select them:



You can add more dates if you wish.

You have to 'Tick To Confirm You're Not On Rota During These Times *' on each date range you add.

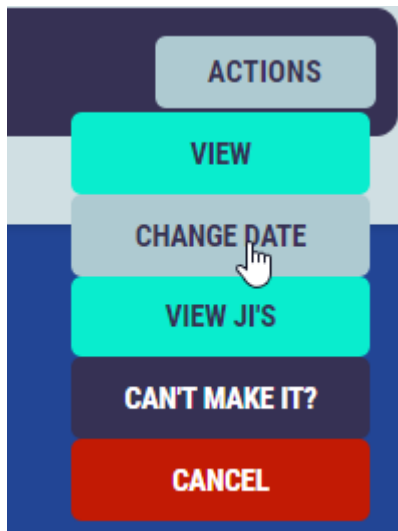
'Extra Information' is for any other details you wish to add.

Finally you select your Training Manager and send the request, this request will then go to your 'Pending' Section of 'Course Requests'



10 Request a Date Change

From the 'Action' drop down you can request to change the date from here, select 'Change Date'



And you will see the screen below:



Your date change request

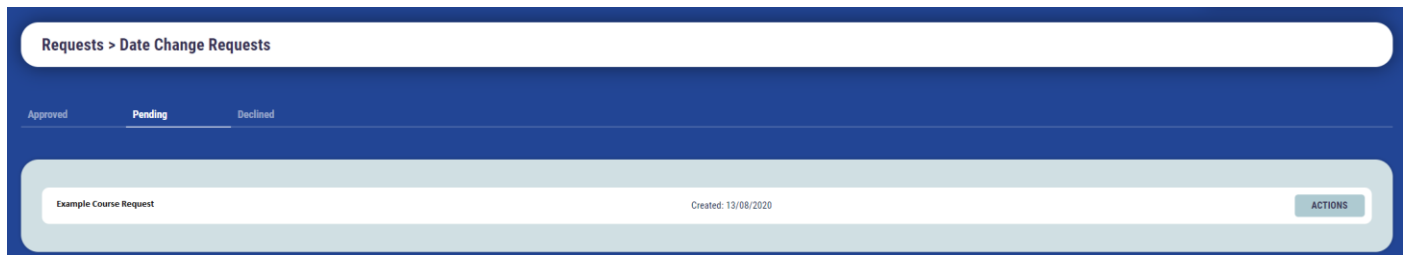
Course	Example Course 1
Location	
Dates	20/08/2020 00:00 - 27/08/2020 00:00
Date From You Requested	30/08/2020
Date To	03/09/2020
When Was The Request Made?	13/08/2020 @ 15:42
Request Status	Pending
The New Location You Requested	
Your Reason For The Request	Better Availability



Request your new date and select 'Save Changes'



This will then take you to the 'Date Change Requests' screen where this request will be 'Pending' see below:



You can view this for more detail.