# STAGE 1: setting up ADMIN and STAFF user accounts

Log in as user "admin" with password "admin123"

Change "admin" password
from "admin123" to something-else.

Create at least one other ADMIN account
(only admin users can lock/unlock ALL
account types) as a recovery account

(Optional)

Create other ADMIN accounts for
BTM group leaders or equivalent but keep the
new assignments to a minimum.

Note that ADMIN or STAFF account holders
can be designated as "BTM Representatives":
these are users who are a primary point of
contact between a family and BTM; they are
assigned responsibility for the management
of a family's personal data. No other ADMIN or
STAFF user can edit the family's personal data
(except for locking/unlocking user accounts).

Create the required STAFF accounts
(these account types should make up
the bulk of the BTM activity organiser
accounts)

Make sure all new users have received an
email with their username and default
password.

Initial BTM volunteers setup complete. Proceed to Stage 2.

Note: new users of all account types (ADMIN, STAFF and
PARENT) are required to change their default
password. The Booking system will not allow
users to proceed beyond the login page until
they do,

# STAGE 2: parent registration and uploading activity templates

Please note that the Booking system does not differentiate between biological parent, foster parent or legal guardian etc. They are all "parents" as far as the Booking system is concerned.

Same goes for children, step-children etc. The system only assumes that an adult ("parent") is responsible for a minor ("child").

ADMIN or STAFF user log in (or already logged in)

What do you want to do?

**Register a parent account (for a new family)**

Submit the Registering Parent's username and email address

A "Registering Parent" is the primary contact for the family and is always registered before ANY other family member.

The family is now part of the system.

The Booking system will automatically assign this family to you. If you aren't one already, you are now a BTM representative.

Other parent needs registering too?

No

Yes

**Register other parent (of an existing family)**

Submit the other parent's (*) username and email address.

(*) If the parent is not designated the "registering parent" then they are loosely referred to as the "other parent" in these instructions.

**Finished everything from here for now**

Log out or go to Stage 3

**Compile a new Activity template**

Devise a unique ID for an activity template. Make sure it really is unique.

Enter all required details for your activity template. The booking system will already know who you are and assign you as the owner (**) of the activity template.

(**) Activity templates can be used by other BTM volunteers when composing activity details (see stage 3).

An "activity template" is akin to a Microsoft Word template. It sets the initial fundamentals of an activity, from which "activity details" (analogous to a Word document) are based on.

Activity templates set out basic attributes including the activity name, the owner of the template and a unique ID.

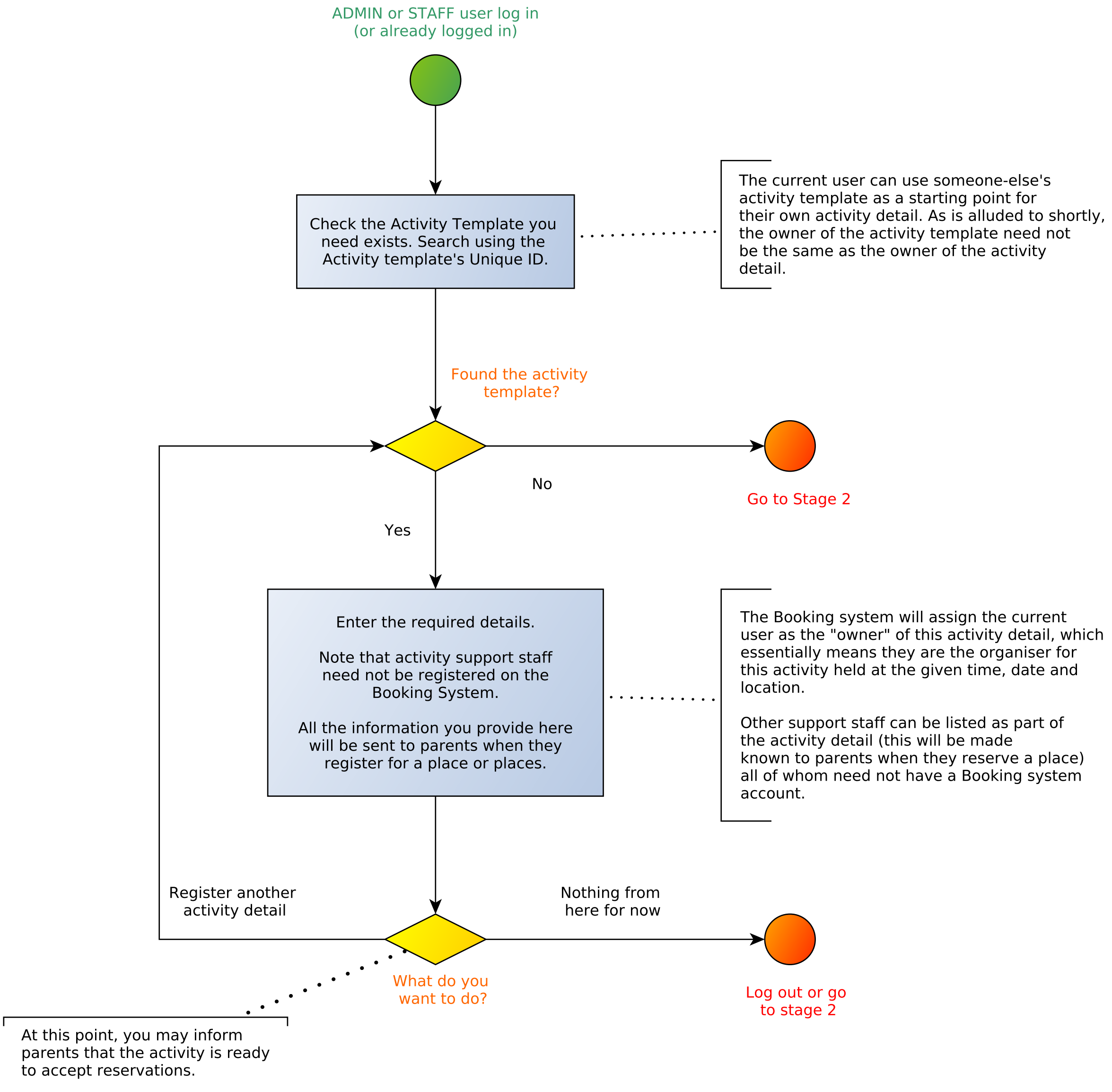
"Activity Details" contain more specific info, including date, time and location of the activity. (More info given later.)

The unique ID is akin to a filename: one can write identical Word documents stored in the same folder but they cannot have identical file names.

The name of an activity template need not be unique but clearly the unique ID must by unique. Unique IDs can be made up of alphanumeric characters but must not contain spaces.

I recommend that BTM as a whole devise a unique ID system so that it makes identifying the activity template a bit easier e.g. "TENNIS001", "FootieSEP2022" and so on.

# STAGE 3: uploading activity details



# STAGE 4: registering child details and booking activities

PARENT log in using credentials emailed to them

Change default password
(parent will then receive an email
that you changed you password and
be logged out of the booking system)

Log back in using new password

Enter all required personal
details and click "Submit"

(Parent to wait for their BTM representative to activate their account)

The parent can log out at this point if they wish.

Each BTM representative will be able
to view a list of parent accounts
awaiting activation. The volunteer will
also receive an email stating that a new
parent account is awaiting activation.

This step is intended to allow the
volunteer to check the details provided
by the parent(s) are sufficient.

ACTIVATION and LOCKED ACCOUNTS
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Note that "activation" is not the same as
an "unlocked account". A parent can log in to
their account as long as their account is
not locked but cannot upload child related
details or make activity bookings until
their account is "activated".

More on what Activation means for the parents
is outlined elsewhere.

ADMIN users can lock/unlock any account
(though obviously not their own!). STAFF
users can only lock/unlock PARENT accounts,
regardless if they are the family's BTM
representative or not.

(Account activated by the BTM
representative)

What do you want
to do now?

**Register my child/edit my child's details**

Enter your child's details.

You will receive an email confirming
that your child's details have been
uploaded/edited.

**Nothing more from here**

Log out

**Book a place on an activity**

Behind the scenes, parents will be able
to view the details from the activity template
and the activity detail, all placed on a
Calendar.

Search for the activity

Book place(s) or cancel
reservation(s)

Parents can book places
for each other (if applicable),
provided their account
is activated.

Parents can only book places
for their child if their details
are held on the Booking system.

Check your email for confirmation

The email will be sent to all parents
that have activated accounts on the system.

Note that the activity detail owner (the
organiser) will not be emailed. They have to
monitor the register from their account.

Regarding reservations only, the email
will inform parents if they secured a
place/places they requested. It is all or
nothing: if there were too many reservations
submitted then no member of the family will
have reserved a place.

Cancellation of bookings are always accepted.

# What is parent account activation

The basics
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Carried out by the assigned BTM rep only.

When activated, the parent or parents can upload their child details and manage activity bookings. It does not relate to user log in access. A locked account is not the same as an unactivated account.

It is not possible to deactivate an (activated) account.

Why activate their account? This step represents an acknowledgement to the parent(s) that their personal details have been received and are sufficient to unlock all features of the application.

In order to allow either parent make changes to child records of their family or edit bookings, on behalf of their partner then a specific set of steps must be carried out in the correct order.

This page attempts to outline what happens internally and what steps the BTM rep can be expected to follow.

Registering parent
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Following the registration email instructions, the registering parent completes their details and selects the option which indicates they have a partner who wants to be linked to this account. Registering parent must also provide the email address of their partner (this is used by the back-end for verification).

Other parent
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Following the registration email instructions, the other parent completes their details and selects the option which indicates they have a partner who wants to be linked to this account. Other parent must also provide the email address of their partner (this is used by the back-end for verification).

Update parent record to indicate they have uploaded the registration form.

Note, this step does not validate the information; the BTM will have to check this by loading the parent's file and seeing if is sufficient. If not, then the parent can use the same link to re-upload the information BTM needs.

Pre-activation stage (with partner)
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BTM rep can get a list of parent accounts who are ready to be activated (i.e. they have provided sufficient details).
If the details are incorrect then the parent(s) will have to log in and edit their personal details again.

On the front-end, the BTM rep will enter the username and email address of both partners (or select two parent records from a list) and check the "is partnered" checkbox (or equivalent).

(Activate accounts)

What the booking system does
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Checks performed with the username and email addresses provided:

+ Did the registering parent consent to bringing partner to the system by selecting "has a Partner"?
+ Do the BTM rep details for both parents match?
+ Do the partners' email address field make sense?

All criteria satisfied?

No → Explain to the user what the problem is

Yes

Activate both parent accounts and link them together.

This means that both parents can:

+ upload/edit child personal details
+ manage activity bookings

Changes made by one parent will be viewable by their partner. Parents can make changes/updates etc. on behalf of each other.

Note: at present, it is not possible to separate the link between both parent accounts.

Registering parent (with INACTIVE account) logs in and updates their personal details to include information about their partner

Registering parent (with ACTIVE account) logs in and updates their personal details to include information about their partner

The next step following this one does not really activate the registering parent's account again but more specifically updates their record to include partner details.

From a practical view, as shown by the workflow, the BTM rep would have to re-"activate" both accounts.

It is possible for the registering parent to change their mind and indicate that they have a partner who wants to be part of the Booking system.

Registering parent completes their details and selects the option which indicates they DO NOT have a partner who wants to be linked to this account.

Update parent record to indicate they have uploaded the registration form.

Note, this step does not validate the information; the BTM will have to check this by loading the parent's file and seeing if is sufficient. If not, then the parent can use the same link to re-upload the information BTM needs.

Pre-activation stage (without partner)
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BTM rep can get a list of parent accounts who are ready to be activated (i.e. they have provided sufficient details).
If the details are incorrect then the parent will have to log in and edit their personal details again.

On the front-end, the BTM rep will enter the username and email address (or select a parent record from a list) of the sole parent partners and uncheck the "is partnered" checkbox.

(Activate account)

What the booking system does
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Simple. Does the email address and username of the sole parent belong to the same user on file?

All criteria satisfied?

No → Explain to the user what the problem is

Yes

Activate the sole parent account.

This means that the parent can:

+ upload/edit child personal details
+ manage activity bookings