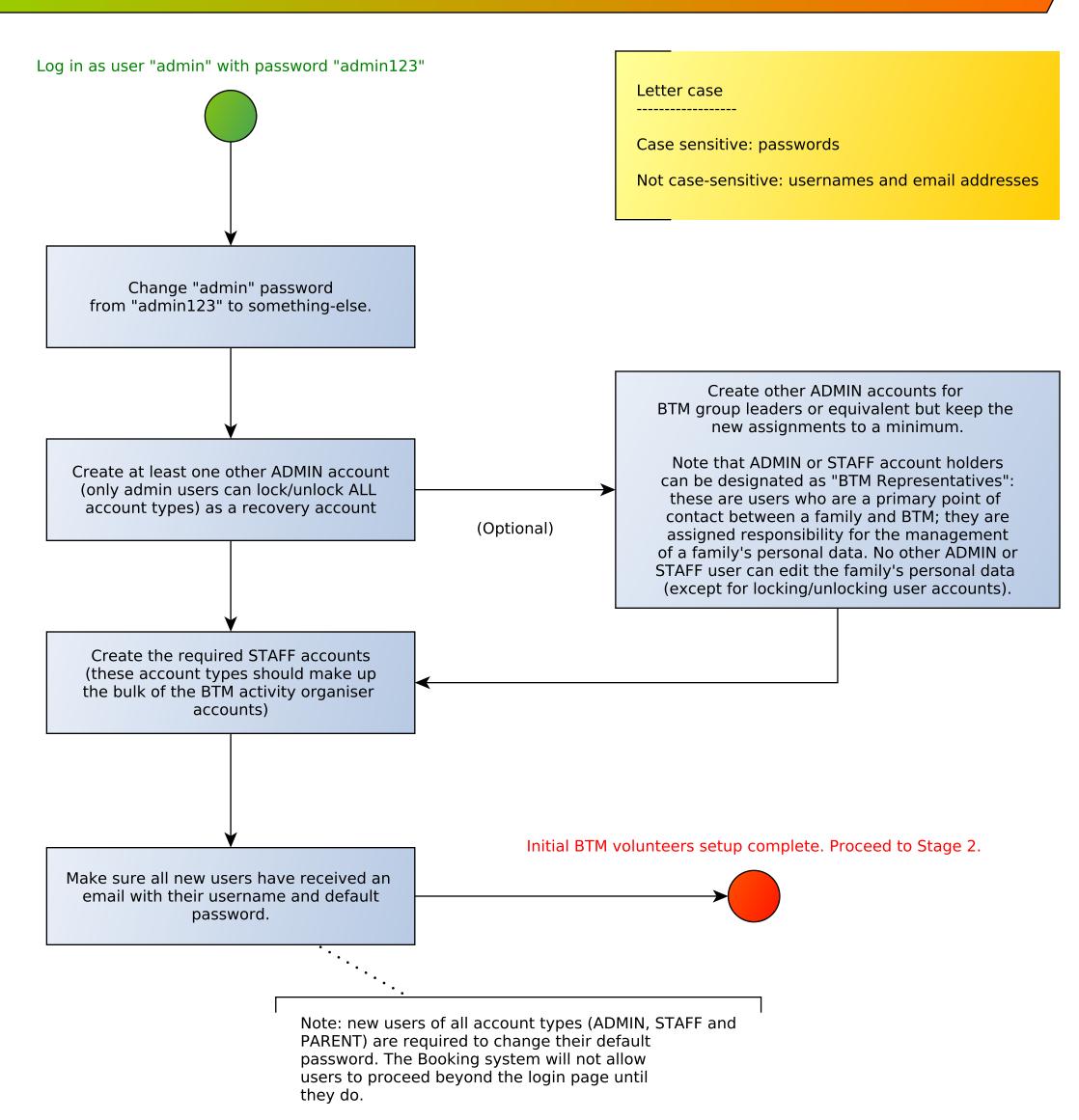
# **STAGE 1: setting up ADMIN and STAFF user accounts**

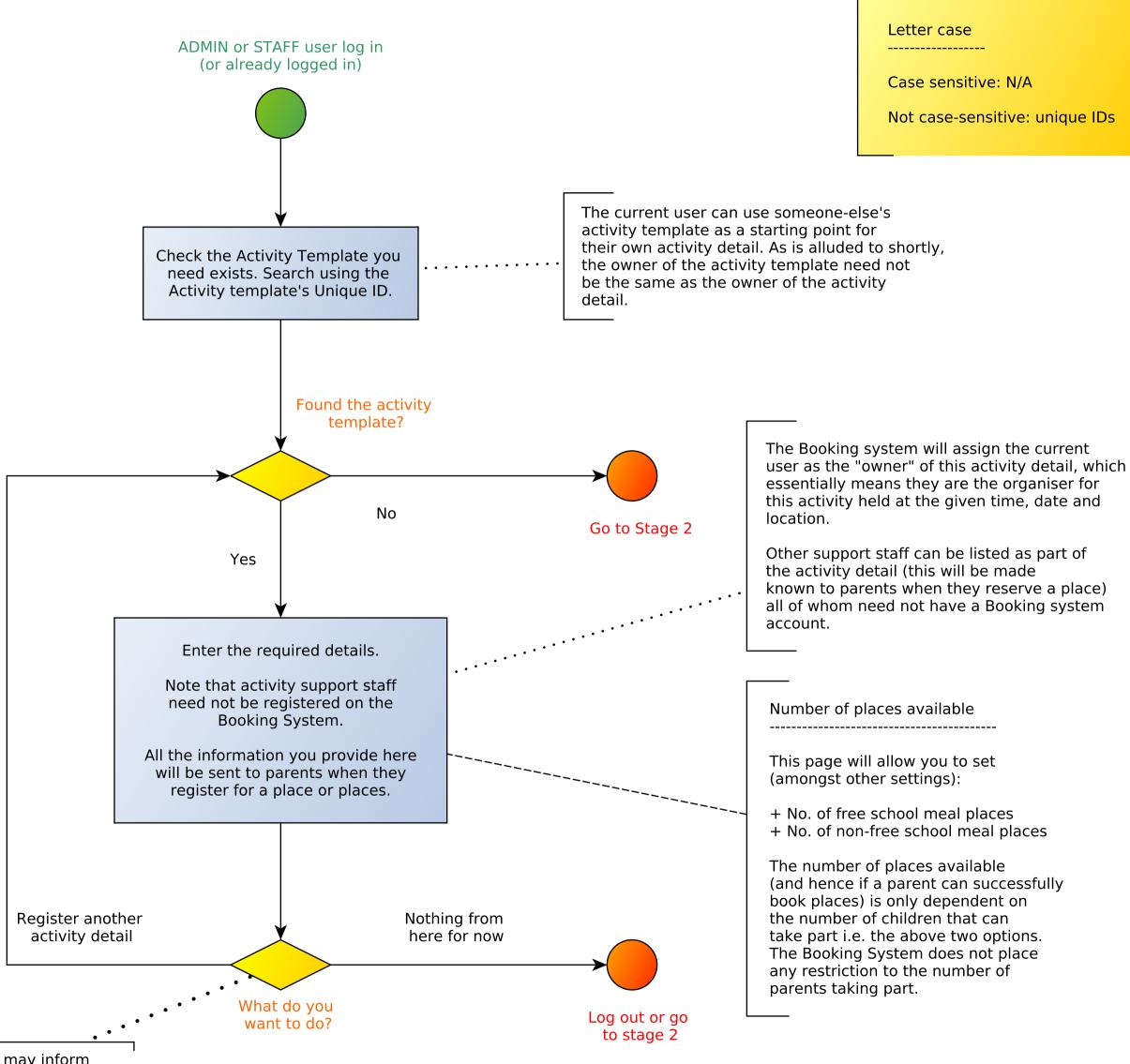


### STAGE 2: parent registration and uploading activity templates

Letter case Please note that the Booking system does not distinguish between biological Case sensitive: N/A parent, foster parent or legal guardian etc. They are all "parents" as far as the Not case-sensitive: usernames, email addresses and unique IDs Booking system is concerned. ADMIN or STAFF user log in Same goes for children, step-children etc. (or already logged in) The system only assumes that an adult ("parent") is responsible for a minor ("child"). An "activity template" is akin to a Microsoft Word template. It sets the initial fundamentals of Register a Submit the Registering Parent's What do you **Compile a new** an activity, from which "activity parent account username and email address want to do? details" (analogous to a Word **Activity template** (for a new family) Devise a unique ID for document) are based on. A "Registering Parent" is the primary an activity template. Make sure it really is unique. contact for the family and is always Activity templates set out basic registered before ANY other family attributes including the activity member. name, the owner of the template and a unique ID. "Activity Details" contain more specific info, including date, time Enter all required details for The family is now part of the system. and location of the activity (see your activity template. The booking stage 3). Register other parent system will already know who you are The Booking system will automatically Finished everything (of an existing family) and assign you as the owner (\*\*) assign this family to you. If you aren't from here for now The unique ID is akin to a filename: of the activity template. one already, you are now a "BTM one can write identical Word documents No representative". stored in the same folder but they cannot have identical file names. The name of an activity template need Other parent needs not be unique but clearly the unique ID registering too? (\*\*) Activity templates can be must by unique. Unique IDs can be used by other BTM volunteers made up of alphanumeric characters when composing activity but must not contain spaces. Yes details (see stage 3). 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. Submit the other parent's (\*) username and email address. (\*) If the parent is not designated the It is currently not possible to delete Activity Templates "registering parent" then they are loosely referred to as the "other parent" in this manual.

Log out or go to Stage 3

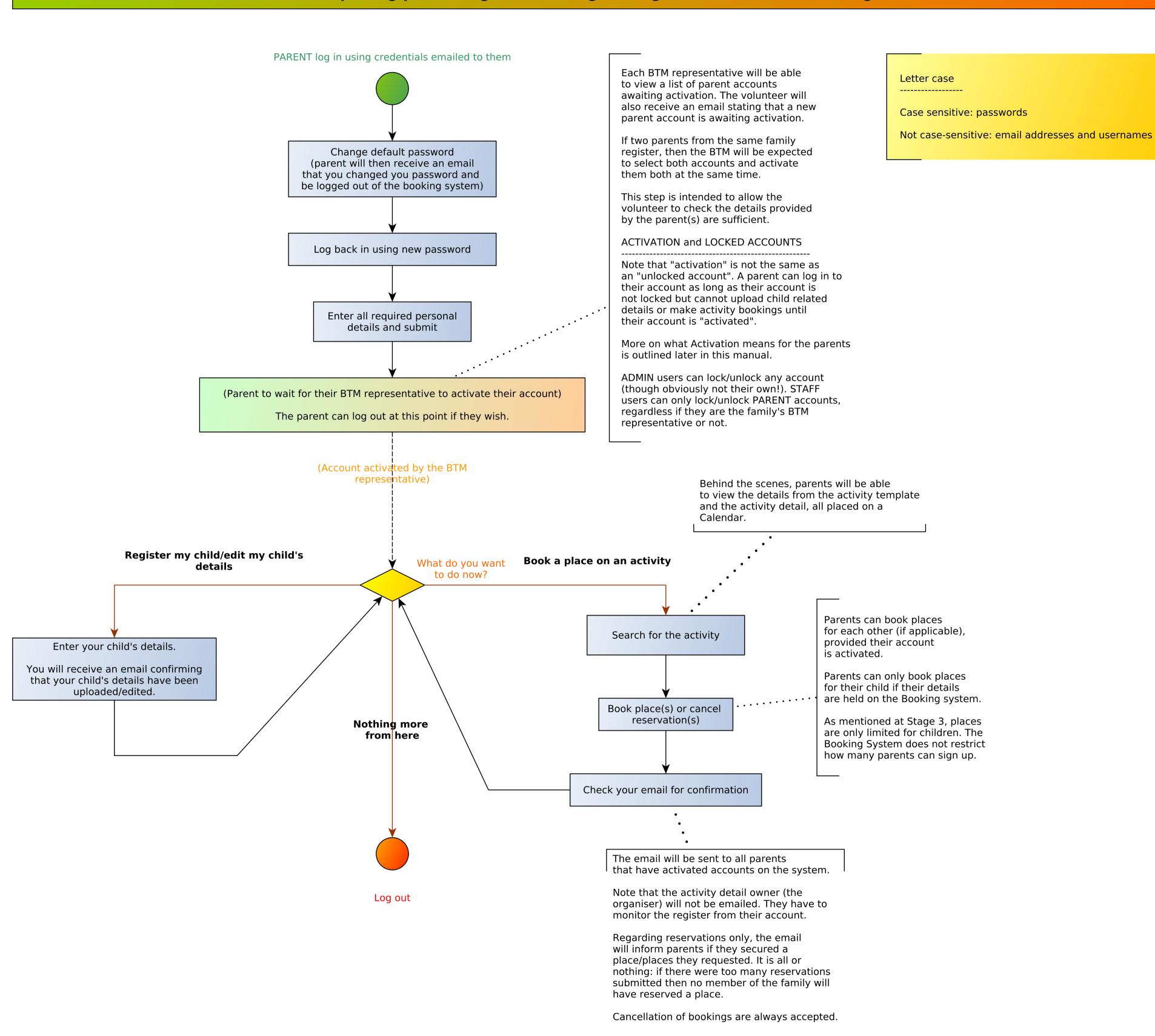
### **STAGE 3: uploading activity details**



At this point, you may inform parents that the activity is ready to accept reservations.

It is currently not possible to delete Activity Details

### STAGE 4: Completing parent registration, registering child details and booking activities



It is possible for the

registering parent to change their mind

### The basics

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

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.

#### and indicate that they have a partner who wants to be part of the Booking system. application. Registering parent Other parent Registering parent completes their details and selects the option which indicates they Following the registration email instructions, the Following the registration email instructions, the DO NOT have a partner who wants to be linked registering parent completes their details other parent completes their details to this account. and selects the option which indicates they and selects the option which indicates they have a partner who wants to be linked to this have a partner who wants to be linked to this account. Registering parent must also provide account. Other parent must also provide the email address of their partner (this is used the email address of their partner (this is used by the back-end for verification). by the back-end for verification). Update parent record to indicate they have uploaded the registration form. Update parent record to indicate they have Registering parent (with INACTIVE uploaded the registration form. Note, this step does not validate the account) logs in and updates information; the BTM will have to check their personal details to include this by loading the parent's file and Note, this step does not validate the information about their partner information; the BTM will have to check seeing if is sufficient. If not, then the this by loading the parent's file and parent can use the same link to re-upload the information BTM needs. 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) Pre-activation stage (without partner) BTM rep can get a list of parent accounts who are ready to BTM rep can get a list of parent accounts who are ready to be activated (i.e. they have provided sufficient details). be activated (i.e. they have provided sufficient details). If the details are incorrect then the parent will have to log in If the details are incorrect then the parent(s) will have to log in and edit their personal details again. and edit their personal details again. On the front-end, the BTM rep will enter the username and email address 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) (or select a parent record from a list) of the sole parent partners and uncheck the "is partnered" checkbox. and check the "is partnered" checkbox (or equivalent). (Activate accounts) (Activate account) What the booking system does What the booking system does Checks performed with the username and email addresses provided: Simple. Does the email address and + Did the registering parent consent to bringing username of the sole parent belong partner to the system by selecting "has a Partner"? to the same user on file? + Do the BTM rep details for both parents match? + Do the partners' email address field make sense? No No All criteria satisfied? All criteria satisfied? Explain to the user Explain to the user what the problem is what the problem is Yes Yes Activate both parent accounts and link them together. This means that both parents can: Activate the sole parent account. Registering parent (with ACTIVE account) logs in and updates + upload/edit child personal details This means that the parent can: their personal details to include + manage activity bookings information about their partner + 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. The next step following this one does not really activate the Note: at present, it is not possible to separate the registering parent's account again but link between both parent accounts. 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.

# **Deleting Booking System accounts**

This page outlines what the booking system does when a request to delete a parent or child account is submitted and what sequence you need to follow to proceed.

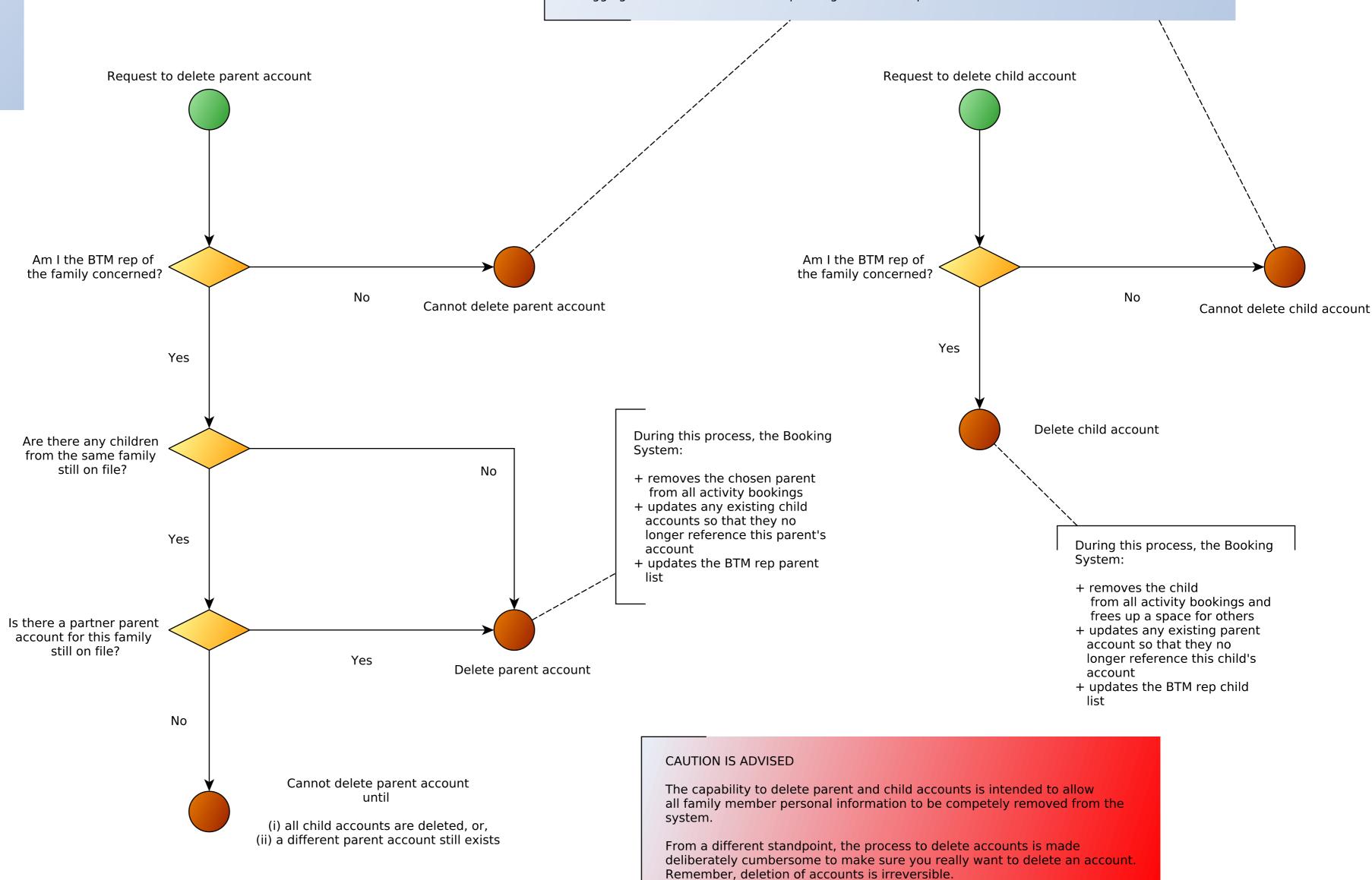
The following assumes that you have found the parent's record either by username or by selecting a parent record from a list of accounts.

At present, STAFF and ADMIN accounts cannot be deleted.

If another user with STAFF credentials wants/needs to delete a parent or child account, then an ADMIN user must first re-assign\* the BTM rep for the family to said STAFF user.

If another user with ADMIN credentials wants/needs to delete a parent or child account, then they can re-assign\* the BTM rep for the family to themself and then proceed to delete the account(s) as shown.

\* Re-assigning BTM reps: please note that parents are not informed if they have been assigned a different STAFF or ADMIN user as their BTM rep. Parents will only know if there is a change by logging in to their account and requesting their BTM rep details.



### **Email notifications**

Emails are sent at given stages when using the Booking System. They are treated as notifications, or as messages for which a reply is not required. I recommend that all Booking System users should be made aware of this information so that they can ignore all other scam emails.

Below is a summary of when emails are sent. Users should not expect automated emails under any other circumstance.

(STAFF or ADMIN user only)

User is sent their username and password, each in separate New user (ADMIN, STAFF and PARENT) accounts emails. User is informed that an instruction to update their personal Update to personal details details (excluding password) was received. User is informed that an instruction to reset their password was received (and the new system generated password is given Reset password from the pre-Login page in the email message). Sole parent or both parents are informed of changes submitted re. an activity booking, and whether the request was accepted. Update to Activity bookings or reservations Note that ADMIN and STAFF users are not emailed, even if they are the activity detail "owner". If the Registering Parent submits the email address of the "other" parent (at registration), then the registering parent is emailed to confirm that the Booking System is awaiting the other parent's registration completion. Similarly, if the "other" parent submits the email address of the Registering parent, then the other parent is emailed. Parent registration submitted, awaiting activation If the Registering Parent does not submit an email address of the other parent, then they are not emailed about the other parent's pending registration. In all cases, the BTM rep is emailed and informed that one or both parents have completed their registration, and are awaiting activation. The BTM rep is expected to select and then activate one or both parent accounts at the same time. If the parent has not submitted sufficient info then the parent should be asked to log in again, edit their personal details, and re-submit their details. When the BTM rep has activated one or both accounts (as applicable) then emails will BTM rep activates parent account

been activated.

be sent to all concerned: the parent(s) and the BTM rep, confirming the accounts have

If another parent is registered at a later date then the BTM rep will (again) be expected to "activate" both accounts at the same time and (again) all concerned will be emailed.