**Dashboard**

To complete

**Sessions**

On the page, you see :

* Possibility to create a new one
* Filters
* Column filters add/hide
* Sort by clicking on the column

**Creating a new**

When creating, we must have those fields :

**FIRST TAB : GENERAL**

* Unique sequential ID (not editable)
* Status
  + Drop down menu with pre-selected fields (editable in Settings)
* Training
  + Drop down menu with pre-selected fields from Trainings tab, showing : Short Name (Reference)
* Duration (in hours)
  + Single text field, default value is %DURATION from Course (Training) chosen above
* Type
  + Drop down menu
    - INTRA
    - INTER
    - Individual
* Location
  + Choose from Locations already registered or create a new one
* Starting Date
  + Date picker (format from wordpress)
* Ending date
  + Date picker (format from wordpress)
* Attendees spots
  + Default value taken from %training\_maximum\_spots% from the training chosen
    - Simple one line text field
* I subcontract the mission to
  + True or False (false by default)
    - IF TRUE
      * Who
        + Simple one line text field
* I am a subcontractor of
  + True or False (false by default)
    - IF TRUE
      * Who
        + Simple one line text field
* Commentary
  + Rich paragraph text editor
* Satisfaction (not editable)
  + Show the results of the gravity forms survey, linked to the Unique sequential ID of the Session
* Results (not editable)
  + Show on the total of attendees, how much have AQUIRED value in %Result%

**SECOND TAB : CALENDAR**

Here, the goal is to set all the dates of the training.  
We cut each day into half days

So we need to be able to set the day and the hours.  
On the way to do, it would be

* Take the Starting Date
* Take the Ending Date
* For each days between starting (included) and ending (included), have 2 rows per day
* On the row, having 2 columns : Starting Hour / Ending Hour with drop down hours for each 15 mins

So example, if starting date is 2022/12/25 and ending date is 2022/12/27 it would be

* 2022/12/25 - Starting Hour 09:00 - Ending Hour 12:00
* 2022/12/25 - Starting Hour 13:00 - Ending Hour 17:00
* 2022/12/26 - Starting Hour 09:00 - Ending Hour 12:00
* 2022/12/26 - Starting Hour 13:00 - Ending Hour 17:00
* 2022/12/27 - Starting Hour 09:00 - Ending Hour 12:00
* 2022/12/27 - Starting Hour 13:00 - Ending Hour 17:00

It's an example but we need to be able to disable one. The goal is to have those infos transfered to the following for generating the documents with the informations.

**THIRD TAB : ATTENDEES**

Here we have the list of people for the training.  
There are global settings and linked settings to the actual session.  
We must be able to choose from the already created Attendees or to Create from the same page a new attendees.  
Think about be able in to create multiple attendees very fast.

We must be able to send emails with an icon on each row for each attendee. So we click on it and we decide which email template is used and will be sent to the email of the attendee (must be editable in case, and add a CC field empty)

* Unique sequential ID (not editable)
* Gender
  + Drop down : Male / Female
* Last Name
  + Simple one line text field
* First Name
  + Simple one line text field
* Phone number
  + Simple one line text field
* Email
  + Simple one line text field
* Birthdate
  + Date picker
* Birth country
  + Simple one line text field
* Birthplace (city)
  + Simple one line text field
* Birthplace (zip code)
  + Simple one line text field
* Is in a situation of disability
  + True or False
    - IF TRUE
      * More informations about his disability
        + Paragraph rich text
* Attendee expectations (is only linked to the training, not a global settings)
  + Rich paragraph text editor
* Conditions for success (is only linked to the training, not a global settings)
  + Rich paragraph text editor
* Is Individual (is only linked to the training, not a global settings)
  + True or False
* Type of funding  (is only linked to the training, not a global settings)
  + Drop down menu with pre-selected fields (editable in Settings)
* Funder  (is only linked to the training, not a global settings)
  + Simple one line text field
* Cost  (is only linked to the training, not a global settings)
  + Simple one line text field
* Status (is only linked to the training, not a global settings)
  + Drop down menu with pre-selected fields (editable in Settings)
    - IF Count in statistics = TRUE
      * Count +1 for the ALL\_ATTENDEES in %TRAINING\_SUCCESS% math calculation
* Result
  + Drop down menu : Acquired, in progress, not acquired
    - IF ACQUIRED
      * Count +1 for the ATTENDEES\_SUCCEDED in %TRAINING\_SUCCESS% math calculation ( ATTENDEES\_SUCCEDED / ALL\_ATTENDEES = value to show in %TRAINING\_SUCCESS% variable in percentage )
  + Satisfaction
    - Get the survey score with the unique ID of the attendee and session ID (because 1 attendee could do multiples trainings so have multiple survey score and we want only the survey linked to that session)
* Attendance time
  + IF BLANK & Count in statistics = TRUE = Take Duration as default value
    - ELSE single text field for numbers format 0,00

For each row of attendees, we must have :

* Document icon
  + Email template
    - Drop down menu
  + Attendee's email, default value is attendee's email
  + Email object, default value is the email object from email template
  + Documents to attach
    - Multiple choice from drop down menu from documents template settings
  + Files to attach
    - Be able to browse from PC to add new attachments
  + Email content
    - Default is email content from email template
* Digital signature
  + Ask a digital signature for the selected document(s)
    - We need to know if we need to provide a special list of template for that and how it will work, so depending of what you can offer us as solution.  
      Most of the time, it is always the same documents but with variables, and sometimes it is documents linked to the training.
* Attendee status changer
  + Be able to change the status
* Attendee result changer
  + Be able to change the result
* Attendee edit
  + Be able to edit all the settings added in the adding page

Buttons to do actions on selected attendees :

* Send documents
* Change status
* Change result

**FOURTH TAB : TRAINERS**

Choose the trainer for the training

* Pick from the Trainers
  + Show only Trainers that have the training in their profile
* Cost
  + Single text field for numeric value

Be able to send to the selected trainer(s) emails and documents.

Get the Second Tab (Calendar) informations about when the Trainer is supposed to be teaching.  
Have all the rows and cross a checkbox if he is present during that time.

Example

* 2022/12/25 - Starting Hour 09:00 - Ending Hour 12:00  [X]
* 2022/12/25 - Starting Hour 13:00 - Ending Hour 17:00  [   ]
* 2022/12/26 - Starting Hour 09:00 - Ending Hour 12:00  [X]

So for this, his $trainer\_presence\_time$ would be 6 hours.  
And something like $exact\_date$ would be : 2022/12/25 - Starting Hour 09:00 - Ending Hour 12:00, 2022/12/26 - Starting Hour 09:00 - Ending Hour   
More infos in report.

**FITH TAB : DOCUMENTS**

The documents we generate in PDF, some can be send by mail.

* Practical tips (from the locations chosen)
* Training program (from the training chosen)
* Attendance sheet
  + Generating following a template the list of attendees and trainers to sign up during training

Buttons for each document are :

* Generate the PDF
* Preview it (in iframe)
* Send it through email

Is that possible to add and remove the documents that will be here if it's linked to a specific settings maybe ? So we can add/remove the document we really use or not.

**SIXTH TAB : FINANCIAL**

Showing all the counting.

* Sum of Attendees cost (Revenue generated)
* Cost from trainer
* Other costs
  + Array with Single text field for numeric value + single text field for label

Be able to add other costs with label

**EIGHTH TAB : LOGS**

Having all logs of all actions made.

* Can only be edited by dev account

If possible, be able to look into one action to have more informations. Export it in pdf.

We are open to discuss about it and what solution can you provide.

**Attendees**

On the page, you see :

* Possibility to create a new one
* Filters
* Column filters add/hide
* Full list depending on the active filter

**Trainings**

On the page, you see :

* Possibility to create a new one
* Filters
* Column filters add/hide
* Full list depending on the active filter

For all the fields used inside this “category”, we need to be able to use them in front-end pages.  
So we can have a shop like, where it display all of the trainings with the informations.  
No payment method, just to be able to having them, filter them and having all the informations.

**Creating a new**

When creating, we must have those fields :

**GENERAL INFORMATIONS**

* Unique sequential ID (not editable)
* Short Name
  + Simple one line text field
* Full Name
  + Simple one line text field
* Reference
  + Simple one line text field
* Duration
  + Simple one line number field with format : 00,00
* Price
  + Simple one line number field
* Max trainees
  + Simple one line number field
* Minimum trainees to confirm
  + Simple one line number field
* Category
  + Drop down menu with pre-selected fields (editable in Settings)
    - Show Label to search
      * Has the ability to type to search and not only choose in the drop down menu
* Type of service
  + Drop down menu with pre-selected fields (editable in Settings)
    - Has the ability to type to search and not only choose in the drop down menu
      * IF F3A is selected, display a drop down menu called Level of service for %TYPE\_OF\_SERVICE\_A% variables
* Is it Online ?
  + Check box True or False
    - IF YES
      * Dropdown menu with Online Training variables
* Is it a Certification ?
  + Check box True or False
    - IF TRUE
      * Show the Certification tab
* Short description of the Goal
  + Rich paragraph text editor
* Target audience
  + Simple one line text field
* Prerequisites
  + Rich paragraph text editor
* Teacher
  + Rich paragraph text editor
* Methods used
  + Rich paragraph text editor
* Teaching resources
  + Rich paragraph text editor
* Evaluation methods
  + Rich paragraph text editor
* Terms and conditions of access
  + Rich paragraph text editor
* Accessibility
  + Rich paragraph text editor
* Show training in public catalog
  + True or False
    - Allow if TRUE to display it on front-end

**TRAINIG CONTENT**

* Training goals
  + Rich paragraph text editor
* Program
  + Rich paragraph text editor

**CERTIFICATION**

* Certification name
  + Simple one line text field
* Directory
  + Drop down menu choices are : RS, RNCP, Other
* Certificate link
  + Simple one line text field
* Duration (tooltip : if there is none, leave it empty)
  + Simple one line text field
* Terms of renewal (show only if Duration is not empty)
  + Rich paragraph text editor
* Possibility of validating one or more blocks of skills
  + Rich paragraph text editor
* Equivalencies or gateways
  + Rich paragraph text editor
* Follow-up and opportunities
  + Rich paragraph text editor

**DOCUMENTS**

Browse from PC to upload documents.

**Administrative documentation**

* Pedagogical course of action
  + Show the actual document in that field
* Competency framework
  + Show the actual document in that field
* Others documents
  + Show them on a list

**Documents for the attendee**

* Documents
  + Show them on a list

**EVALUATION**

Choose between templates from Gravity forms (or something similar powerful) the forms template to use for

* Positioning test
* Evaluation of achievements
* Satisfaction quiz for attendee
* Satisfaction quiz for trainer

Question here : is there a way to take an entry back and show the difference like before / after ?   
I will take an example to be more specific :

1. Attendee does a positioning test and got some questions about : What is your level right now from 1 to 5 in english ?
2. Attendee replies level 1 before training
3. Attendee does the training
4. At the end of the training, the same form is sent or something similar with same questions but now after the training
5. Attendees replies level 4 after training

Is there a way to show to the attendee his previous reply AND/OR how can we manage to see the difference easily ? It's a bonus question.

**PERFORMANCE**

Here it is supposed to show the results of all the survey as an average of all Sessions in status Realized only and for each attendee with Status that has “count in statistics” as TRUE.  
So for example, we don't count for attendees that has been cancelled.

We count how many sessions realized has this training.  
We count how many attendees has been trained through the sessions on that training.

* Satisfaction
  + Not editable : getting the informations from a database table
* Success
  + Not editable : getting the informations from a database table

**Trainers**

On the page, you see :

* Possibility to create a new one
* Filters
* Column filters add/hide
* Full list depending on the active filter

**Creating a new**

When creating, we must have those fields :

**General informations**

* Unique sequential ID (not editable)
* Gender
  + Drop down : Male / Female
* Last Name
  + Simple one line text field
* First Name
  + Simple one line text field
* Phone number
  + Simple one line text field
* Email
  + Simple one line text field
* Status
  + Drop down menu with pre-selected fields (editable in Settings)
* Trainings
  + List of all the trainings registered, multiple select choice
* User ID
  + Drop down list of users in role Trainer, showing First Name - Last Name

**Documents**

Be able to upload documents

* Resume
  + Can have multiple documents attached
* Diplomas
  + Can have multiple documents attached
* Contract
  + Can have multiple documents attached
* Others
  + Can have multiple documents attached

**Locations**

On the page, you see :

* Possibility to create a new one
* Filters
* Column filters add/hide
* Full list depending on the active filter

**Creating a new**

When creating, we must have those fields :

* Unique sequential ID (not editable)
* Name
  + Simple one line text field
* Address
  + Simple one line text field (autocompletion by Google maps)
* Zip Code
  + Simple one line text field (autocompletion by Google maps)
* City
  + Simple one line text field (autocompletion by Google maps)
* Country
  + Simple one line text field (autocompletion by Google maps)
* Phone Number
  + Simple one line text field
* How to access
  + Rich paragraph text editor
* General informations
  + Rich paragraph text editor
* Attached files
  + Possibility to upload files

**Calendar**

Soon

**Reports**

Realized if we don't talk about it, you risk to develop in a way that you need to edit a lot of things to get it work.  
So let's talk about what we need first.

Filtered by Year

* ONE COLUMN (C frome our code system)
  + SUM of %COST% (Attendee tab in Session) if Session %STATUS% = Realized and %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE for each %ATTENDEE\_TYPE\_FUNDING% (1 row per %ATTENDEE\_TYPE\_FUNDING%)
  + SPECIFIC ROW : SUM of %COST% (Attendee tab in Session) if %SUBCONTRACTOR\_OF% = TRUE and Session %STATUS% = Realized and %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE
* ONE COLUMN - TOTAL
  + SUM of %COST% if Session %STATUS% = Realized and %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE (should be the Total of each row above)
* ONE COLUMN (D from our code system)
  + SUM of %TRAINER\_COST% if Session %STATUS% = Realized for each %TRAINERS\_STATUS% (1 row per %TRAINERS\_STATUS%)
* ONE COLUMN - TOTAL
  + SUM of %TRAINER\_COST% if Session %STATUS% = Realized (should be the total)
* TWO COLUMNS (E from our code system)
  + SUM of TRAINERS for each %TRAINERS\_STATUS% IF $TRAINER\_PRESENCE\_TIME$ IS NOT 0 (1 row per %TRAINERS\_STATUS%)
  + SUM of $TRAINER\_PRESENCE\_TIME$ for each %TRAINERS\_STATUS% (1 row per %TRAINERS\_STATUS%)
* TWO COLUMNS (F-1 from our code system)
  + SUM of ATTENDEES IF %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE for each %TYPE\_FUNDING\_F% (1 row per %TYPE\_FUNDING\_F%)
  + SUM of %ATTENDANCE\_TIME% IF %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% IS TRUE for each %TYPE\_FUNDING\_F% (1 row per %TYPE\_FUNDING\_F%)
* TWO COLUMNS - TOTAL
  + SUM of ATTENDEES IF %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE (should be the Total of the 5 rows above)
  + SUM of %ATTENDANCE\_TIME% IF %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% IS TRUE (should be the Total of the 5 rows above)
  + ONE ROW : SUM of ATTENDEES IF %IS\_TRAINING\_ONLINE% IS TRUE AND %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE
* TWO COLUMNS (F-2 from our code system)
  + SUM of ATTENDEES IF %SUBCONTRACT\_TO% = TRUE and %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE
  + SUM of %ATTENDANCE\_TIME% IF %SUBCONTRACT\_TO% = TRUE and %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE
* TWO COLUMNS (F-3 from our code system)
  + ONE ROW : SUM of ATTENDEES if %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE for %TYPE\_OF\_SERVICE% = F3A from Trainings in Session %STATUS% = Realized
  + ONE ROW : SUM of %ATTENDANCE\_TIME% if %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE for %TYPE\_OF\_SERVICE% = F3A from Trainings in Session %STATUS% = Realized
  + SUM of ATTENDEES if %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE for each %TYPE\_OF\_SERVICE\_A% from Trainings in Session %STATUS% = Realized (should be 6 rows)
  + SUM of %ATTENDANCE\_TIME% if %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE for each %TYPE\_OF\_SERVICE\_A% from Trainings in Session %STATUS% = Realized (should be 6 rows)
  + SUM of ATTENDEES if %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE for each %TYPE\_OF\_SERVICE% and IS NOT F3A from Trainings in Session %STATUS% = Realized (should be 5 rows)
  + SUM of %ATTENDANCE\_TIME% if %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE for each %TYPE\_OF\_SERVICE% and IS NOT F3A from Trainings in Session %STATUS% = Realized (should be 5 rows)
* 4 COLUMNS (F-4 from our code system)
  + SUM of ATTENDEES for each %COURSE\_CATEGORY% if Session %STATUS% = Realized and %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE (display the code in one column and name in another column for  %COURSE\_CATEGORY%)
  + SUM of %ATTENDANCE\_TIME% for each %COURSE\_CATEGORY% if Session %STATUS% = Realized and %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE
  + number of rows depending of the number of different course category used this year in session finished (Realized status).
* TWO COLUMNS (G from our code system)
  + SUM of ATTENDEES for IF %SUBCONTRACTOR\_OF% = TRUE and %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE
  + SUM of %ATTENDANCE\_TIME% IF %SUBCONTRACTOR\_OF% = TRUE and %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE

Explanations - Goal of variables

* { %PARTICIPATION\_STATUS% %COUNT\_IN\_STATISTICS% = TRUE } is to be sure the attendee was present to be counted.
* { Session %STATUS% = Realized } is to be sure the training session has been realized

Explanations in depth

* C code
  + Having the revenue in 19 differents rows depending of type of funding if the training session has been done (Realized)
  + Total row of those 19 rows
* D code
  + The cost if trainer is internal or external and the total of it
* E code
  + A row for internal trainers with 2 columns : how much different trainers, sum of hours done (if they were really present)
  + A row for external trainers with 2 columns : how much different trainers, sum of hours done (if they were really present)
* F-1 code
  + 5 rows dedicated for the %type\_funding\_f% with 2 columns : sum of attendees, sum of hours done by each (if they were really present)
  + Total of those 5 rows with 2 same columns
  + Number of attendees who followed a training online (if they were really present)
* F-2 code
  + A row when "I subcontract the mission to" is true, 2 columns : sum of  attendees, sum of hours done by each (if they were really present)
* F-3 code
  + 1 row when F3a is selected in the Training of a Session, 2 columns : sum of attendees, sum of hours done by each (if they were really present)
  + 6 rows when F3a is selected in the Training of a Session for each type\_of\_service\_a (levels), 2 columns : sum of attendees, sum of hours done by each (if they were really present)
  + 5 rows when F3a is not selected in Training of a Session, 2 columns : sum of attendees, sum of hours done by each (if they were really present)
* F-4 code
  + Each row should be an used course category in 4 columns : name of course category, code of course category, sum of attendees, sum of hours done by each (if they were really present)
* G code
  + A row when "I am a subcontrator of" is true, 2 columns : sum of attendees, sum of hours done by each (if they were really present)

**Settings**

**Company**

* Company name
* Company address
* Company phone number
* Company email address
* Company logo header
* Company signature

**Documents**

We set the template for each document.

* Training contract
  + Set the header with
    - Company name
    - Company address
    - Company phone number
    - Company email address
    - Company logo header
    - Company footer
  + Rich paragraph text editor with variables usage like
    - Training-short-name
    - Training-duration
    - Attendee-first-name
    - Attendee-last-name
    - …
  + Footer with variables like
    - Company signature
    - Company footer
* Invitation documents
  + Invitation
    - Rich paragraph text editor with variables again
  + Others documents
    - Rich paragraph text editor with variables again
* Certification
  + Rich paragraph text editor with variables again

We can also create new templates.

**Documents list**

For attendees

* Contract
* Invitation
* Certificate of completion
* Certificate of achievement

For trainers

* Attendees list with expectations & conditions of success
* Attendance sheet
* Letter of mission
* Contract
* Welcome Guide

**Emails**

Template for emailing.

Be able to use variable in emails linked to trainings, trainers, attendees.  
Global variable & specific variable when in a training.

* Training contract
  + Hello %attendee-first-name%,   
    You will find inside that email your training contract for the %training-full-name% starting the %training-start-date% that you must…
* Satisfaction Survey
  + Be able to use gravity forms already created survey but to link it to the Training Session
    - Dynamic data inside the link to fill a hidden field with the Unique sequential ID of the Training Session
    - Use the same Unique sequential ID (not editable) from the Training for the Training field hidden label
      * So there is a total results of the survey for each attendee
      * This result is reported inside the Training page/profile for each Training showing
        + Satisfaction = % of satisfaction for all the attendees who did that training

**Examples**

* Template : Test in progress
  + Define the object
  + Define the corpse
  + Put link from %Positioning\_test% depending of the training of the session
* Template : Test in progress relaunch
  + Define the object
  + Define the corpse
  + Put link from %Positioning\_test% depending of the training of the session
  + Joint the document : Procedure in case of difficulties
* Template : Welcome in training
  + Define the object
  + Define the corpse
  + Join following documents
    - Rules of procedure
    - Convocation
    - General conditions
    - Advice related to the place of training
    - Procedure in case of difficulties
    - Complaint procedure
    - …
* Template : Your attendees
  + Define the object
  + Define the corpse
  + If Is in a situation of disability is True for one attendee
    - Give more informations about the disability from the field More informations about his disability
  + Get the Attendee expectations & Conditions for success for each attendees of the training
  + Get the positioning results from the form sent to all the attendees and give them to the trainer
* Template :  Satisfaction email
  + Define the object
  + Define the corpse
  + Get the Satisfaction quiz for attendee link from the training
* Template : Trainer Satisfaction email
  + Define the object
  + Define the corpse
  + Get the Satisfaction quiz for trainer link from the training

**Notifications**

Be able to plan an email sending depending of variables.

* Name of the notification
  + Simple one line text field
* Mail template used
  + Drop down and choose from emails template
* When ?
* Drop down and choose : Changing attendee status, at a date
  + IF ATTENDEE STATUS
    - Drop down and choose from Attendees Status
  + IF DATE
    - Drop down : Training start date, Training end date
    - Drop down : Before, After
    - Drop down : 1, 2, 3, 4 … until 30 in days

**Examples**

Attendee's status changed to TEST IN PROGRESS

* Send the Test In Progress email template to the attendee

Attendee's status is TEST IN PROGRESS during 2 days

* Send the Test in Progress Relaunch email template to the attendee

Attendee's status changed to CONFIRMED

* Send the Welcome in training email template to the attendee

3 days before Training starting date if status is Confirmed

* Send the Your attendees email template to the trainer

1 day before Training starting date if status is Confirmed

* Send the Training reminder email template to the attendee
* Send the Training reminder trainer email template to the trainer

3 hours before Training end date and end hour if status is Confirmed

* Send the Satisfaction email template to the attendees
* Send the Teacher Satisfaction email template to the trainer

The only issue I see, when we change the attendee status, it will be automatic, is that possible to make it automatic or manual depending of what the user wants ?

**Variables**

**Sessions status**

* (Color Circle Orange) Considered
* (Color Circle Green) Confirmed
* (Color Circle Blue) Ongoing
* (Color Circle Black) Realized
* (Color Circle Red) Cancelled

**Course Category**

We have 3 fields for each :

* Label = %CODE% “ - ” %NAME%  
  Example : 110 - All

We have a list of ~ 100 choices.

**Type of Service**

* F3a
* F3b
* F3c
* F3d
* F3e
* F3f

%TYPE\_OF\_SERVICE\_A% :

* Level 6 to 8
* Level 5
* Level 4
* Level 3
* Level 2
* No level

**Trainers Status**

* Internal
* External
* …

**Attendees Situation**

* Personal
* Foreign Company
* Company
* …

**Attendees Status**

For each, Add a check box : True/False = Count in statistics

* Waiting confirmation
* Test in progress
* Confirmed
* Waiting satisfaction
* To be Charged
* Charged
* Paid
* Cancelled
* To Call
* …

**Type of Funding**

19 In total.

* Personal
* CIF
* CPF
* …

%TYPE\_FUNDING\_F% : For each choice, we must be able have a dropdown menu, default is NULL and other choices are :

* Employees of private employers excluding apprentices
* Apprentices
* Job seekers trained by your training organization
* Individuals trained by your training organization at their own expense
* Other trainees

**Online training**

* Elearning
* Virtual classes
* …

**Main questions**

1. How the PDF document generation is done, and when ?
   * To explain more about that question. We need to be able to provide a PDF document about the training which contains all the informations about the training. Do we need to have a generating system inside the Training page so we can select it or it can be done without that ? In this case, the document won't change everytime.
   * In other case, if we talk about contract, the contract will have some changes everytime because the name of the attendee and the informations about the training will change everytime.
2. Is it worth to stay on Wordpress or do you recommend something else ?
3. Drop down menus must have the ability to type text to search and not only choose by clicking
4. For each uploaded document, be able to preview them like inside an iframe for PDF.
5. Is that possible to track who really did the satisfaction survey and who didn't ? And make some auto-reminder to do it ?
6. Is that possible to link documents sent (in PDF) to digital signatures ? On wordpress we use [ApproveMe eSignature](https://www.approveme.com/)
7. What could be good usage through API to work with ?
8. Create some restrictions on usage like you can’t have more than 20 sessions or 50 attendees or something else, is that possible ?