



Leader Administration

Reference Manual

1. Accessing the Administration

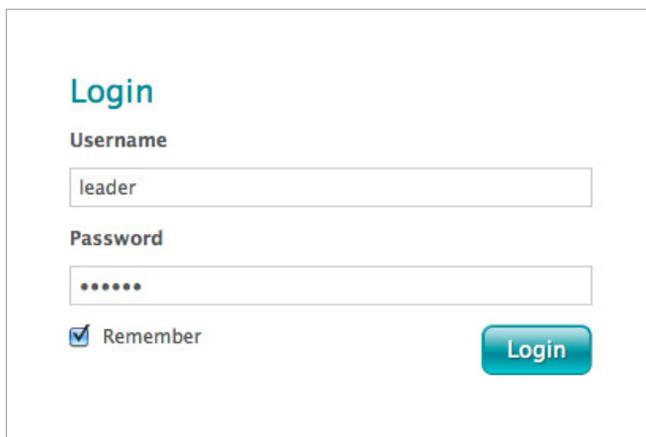
Go to www.healthychange.ca

Login to the Administration area by clicking **Login** in the top navigation.



Enter your login information.

Checking **Remember** will prevent your login from timing out.



A login form titled "Login" in teal. It contains a "Username" field with the text "leader", a "Password" field with six dots, a checked "Remember" checkbox, and a teal "Login" button.

Once you have logged in, a login bar will appear at the bottom of each page



The login bar provides links to access the **Administration** area and update your **Account**. (i.e. Contact Information)

To log out of the system, click Log Out.

2. Adding a Workshop

To add a workshop, click **New Workshop**.



Enter the information for the Workshop.

* Denotes required fields

Workshops > New Workshop

New Workshop

Workshop Information

Workshop Type *

Chronic Disease

Description

The Healthy Change workshop is a free six-week workshop. The workshop helps people with chronic health conditions and their caregivers to better cope with symptoms and activities of daily life. We suggest that participants attend all six sessions of the workshop, where possible.

Community *

Thunder Bay

Venue *

North West CCAC Head Office

Address *

961 Alloy Drive

City *

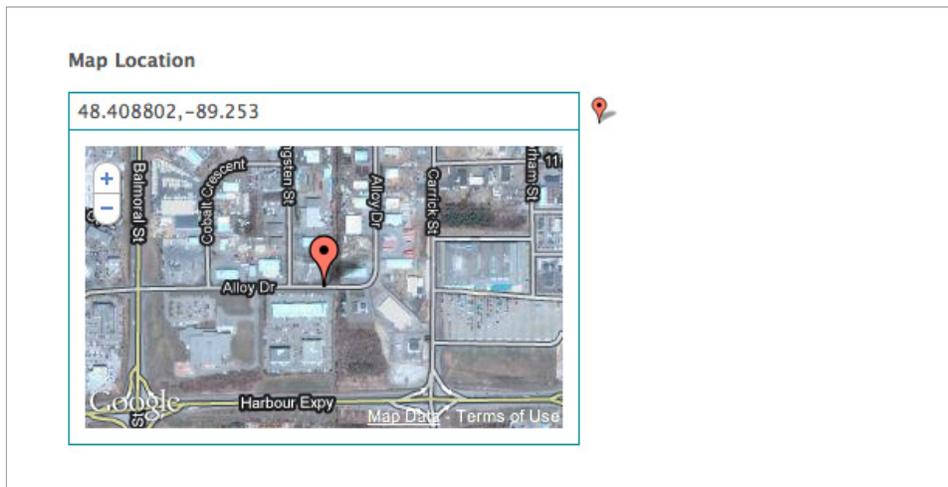
Thunder Bay

Postal Code *

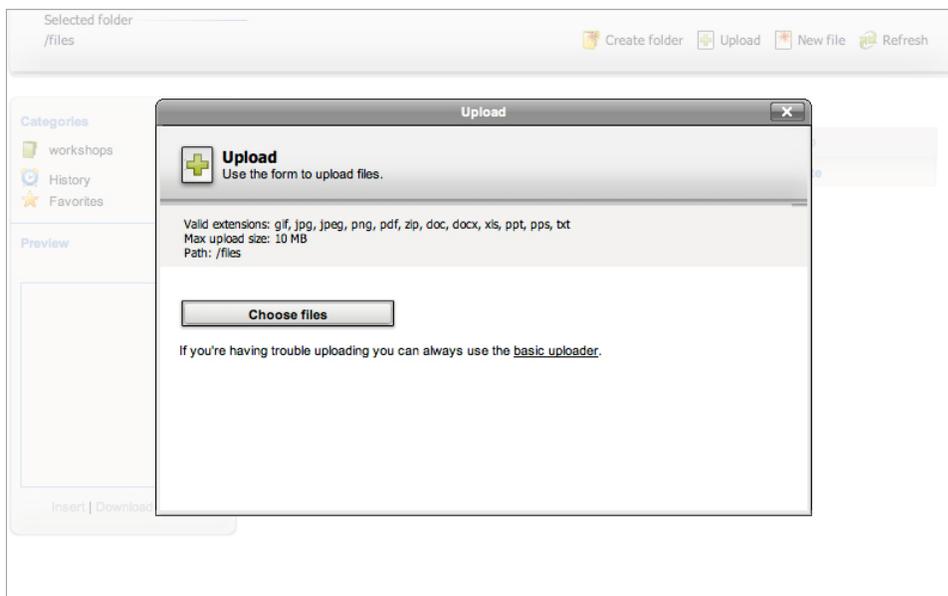
P7B 5Z8

Workshop Details

The map location can be modified by dragging the map point.



If there is a file to display with the workshop (i.e. poster), click the file icon. Files can be uploaded by clicking Upload, then Choose files.



Registration Details

Modify the Registration Details as necessary for each workshop.

Registration Details

To register for this workshop, please call our toll free number: 1-800-626-5406

Maximum Participants *

20

Videoconferencing is available

Online registration is closed

Workshop is active

The number of spots available is determined by the **Maximum Participants**.

Check the Videoconferencing option if the workshop venue can accommodate this.

If online registration is closed, the workshop will appear on the website, but participants will need to register using the contact information shown in **Registration Details**.

The workshop must be active to appear on the website.

To move to the next step, click **Next**.

Next

If a **Validation Error** displays upon submission, correct any errors as necessary.

Validation Error ✕

Please enter the name of the Venue.

OK

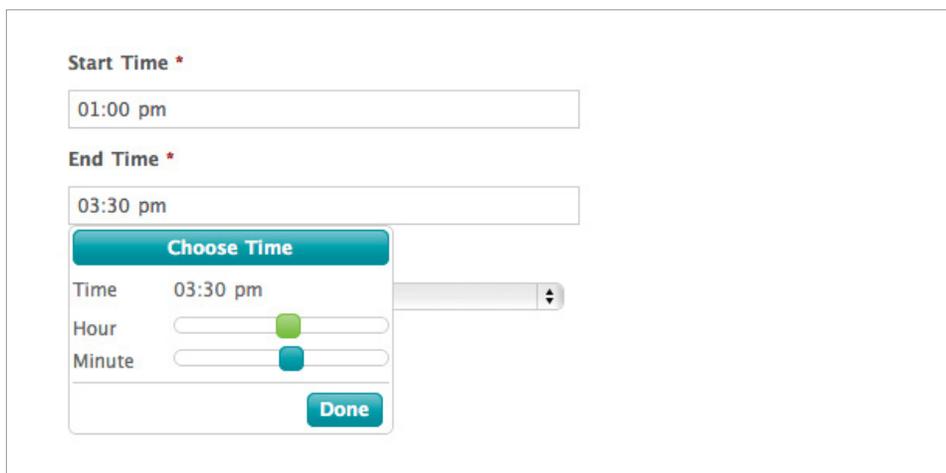
Workshop Dates

Enter all 6 dates for the workshop in the format yyyy-mm-dd.
A datepicker will pop up to simplify date selection.



The screenshot shows a form titled "Workshop Dates *". It features a text input field containing "2011-05-02" with a calendar icon to its right. Below this is a datepicker for "May 2011". The datepicker has a header with "May 2011" and navigation arrows. The days of the week are listed as Su, Mo, Tu, We, Th, Fr, Sa. The dates 1 through 31 are displayed in a grid. The date 2 is highlighted in orange. To the right of the datepicker are five empty text input fields, each with a calendar icon, representing the remaining five dates for the workshop.

Enter the **Start Time** and **End Time** for the workshop.
A timepicker with hour and minute sliders will pop up to simplify time selection.



The screenshot shows a form with two text input fields. The first is labeled "Start Time *" and contains "01:00 pm". The second is labeled "End Time *" and contains "03:30 pm". Below the "End Time" field is a "Choose Time" dialog box. The dialog box has a title bar "Choose Time" and a "Time" field showing "03:30 pm". Below this are two sliders: "Hour" with a green slider and "Minute" with a blue slider. A "Done" button is at the bottom of the dialog box.

The workshop **Time Zone** can be modified if necessary.
This will help in coordinating videoconferencing.

Workshop Submission

Select additional **Leaders** for the workshop.

Workshop Leaders

Leaders *

Select Leaders

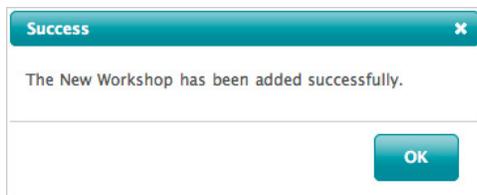
Workshop Leader

The leader creating the workshop is added automatically.
The additional leaders will have access to administer the workshop as well.

To go back and change workshop input, click **Back**.
When all input is correct, click **Finish**.

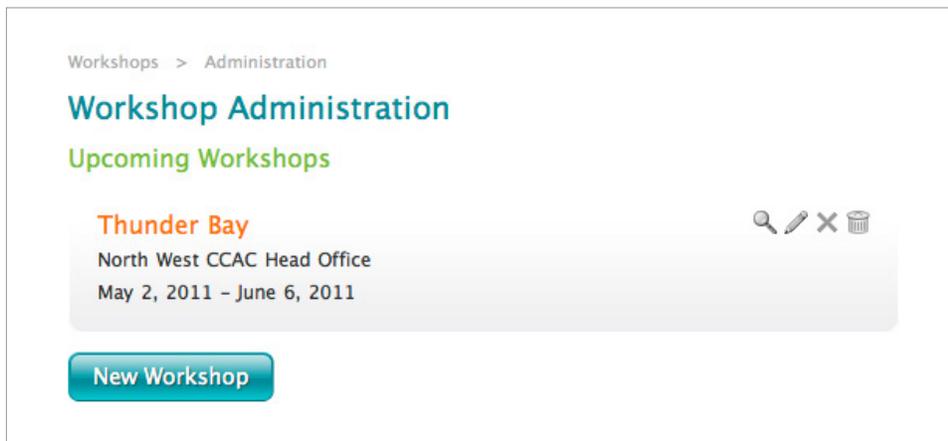


Upon success, the workshop is added to the website.



3. Modifying a Workshop

Created workshops will appear in the **Workshop Administration**.



The screenshot shows the 'Workshop Administration' page. At the top, it says 'Workshops > Administration'. Below that is the title 'Workshop Administration' and a sub-section 'Upcoming Workshops'. A workshop entry for 'Thunder Bay' is shown, with details: 'North West CCAC Head Office' and 'May 2, 2011 - June 6, 2011'. To the right of the entry are four icons: a magnifying glass, a pencil, an 'X', and a trash can. Below the workshop entry is a 'New Workshop' button.

Click the magnifying glass icon to **View** the workshop details.

Click the pencil icon to **Edit** the workshop.

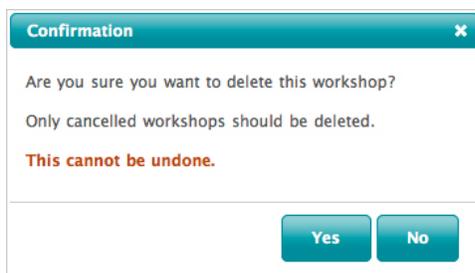
Click the X icon to **Cancel** the workshop.

Click the trashcan icon to **Delete** the workshop.

Cancelling a workshop (X icon) sends a cancellation notification to all pending and confirmed participants associated with the workshop. These participants are automatically moved to the waiting list. The workshop is then set as inactive.

Deleting a workshop (trashcan icon) cancels the workshop first, then completely removes it from the system. This option should only be used if a workshop was created in error, as deleted workshops cannot be restored and will not appear in administrative reports.

If a workshop has been cancelled, use the Cancel option instead.



The screenshot shows a 'Confirmation' dialog box with a close button (X) in the top right corner. The text inside reads: 'Are you sure you want to delete this workshop?' followed by 'Only cancelled workshops should be deleted.' and 'This cannot be undone.' in red. At the bottom, there are two buttons: 'Yes' and 'No'.

4. Managing Participants

To administer participants, click the **Participants** button in the navigation.

Upcoming workshops will display in a list.



The screenshot shows a web interface for "Participant Administration". At the top, it says "Workshops > Administration". Below that is the title "Participant Administration" and a sub-section "Upcoming Workshops". A workshop entry for "Thunder Bay" is shown, with details: "North West CCAC Head Office" and "May 2, 2011 - June 6, 2011". To the right of the workshop name are icons for a magnifying glass and a pencil. At the bottom left of the workshop entry is a blue button labeled "New Workshop".

Click the magnifying glass icon to **View** the workshop participants.
Click the pencil icon to **Edit** the workshop participants.

Viewing Participants

Confirmed participants will appear in green.

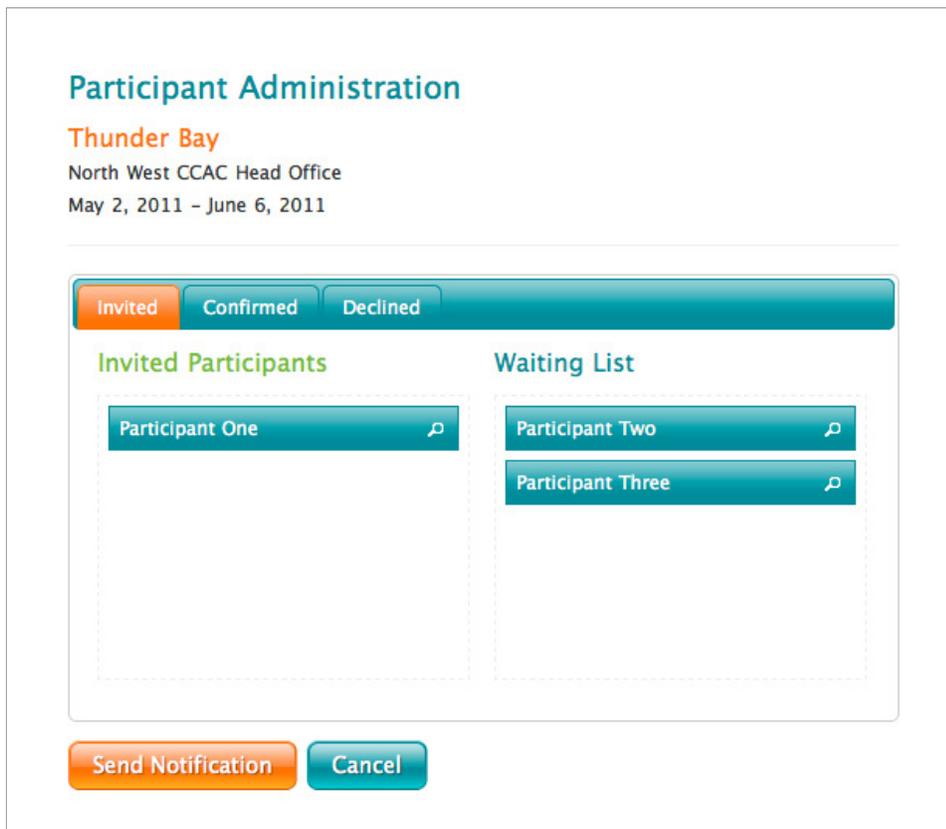


A green rectangular card with the text "Participant One" on the left and a magnifying glass icon on the right.

Click the magnifying glass icon to **View** the participant details.
Participants attending via videoconference will display a signal icon.
Inactive participants will display an alert icon.

Editing Participants

To invite a participant to a workshop, drag and drop them from the **Waiting List** to the list of **Invited Participants**.



The screenshot displays the 'Participant Administration' interface for a workshop titled 'Thunder Bay' at the 'North West CCAC Head Office' from 'May 2, 2011 - June 6, 2011'. At the top, there are three tabs: 'Invited' (highlighted in orange), 'Confirmed', and 'Declined'. Below the tabs, there are two columns: 'Invited Participants' and 'Waiting List'. The 'Invited Participants' column contains one participant, 'Participant One', in a teal box with a drag handle icon. The 'Waiting List' column contains two participants, 'Participant Two' and 'Participant Three', also in teal boxes with drag handle icons. At the bottom of the interface, there are two buttons: 'Send Notification' (orange) and 'Cancel' (teal).

Click **Send Notification** to invite the participants that have just been dragged over.

There are additional tabs to display participants that have **Confirmed** or **Declined** attendance.

Editing Participants

Upon clicking **Send Notification**, participants will receive a confirmation message for them to **Attend** or **Decline** the invitation.

If a participant has no email address, they should be notified by phone.

Please confirm your registration to this workshop by clicking one of the following options:

To be removed from the waiting list, [click here](#).

Participants pending a response will appear in green.



Click the magnifying glass icon to **View** the participant details.

Confirm attendance on behalf of a participant by clicking the checkmark icon.

Decline attendance on behalf of a participant by clicking the X icon.

Participants will be notified of any changes to their status via email.

If no email address is provided, notifications will prompt the leader to contact the participant by phone.

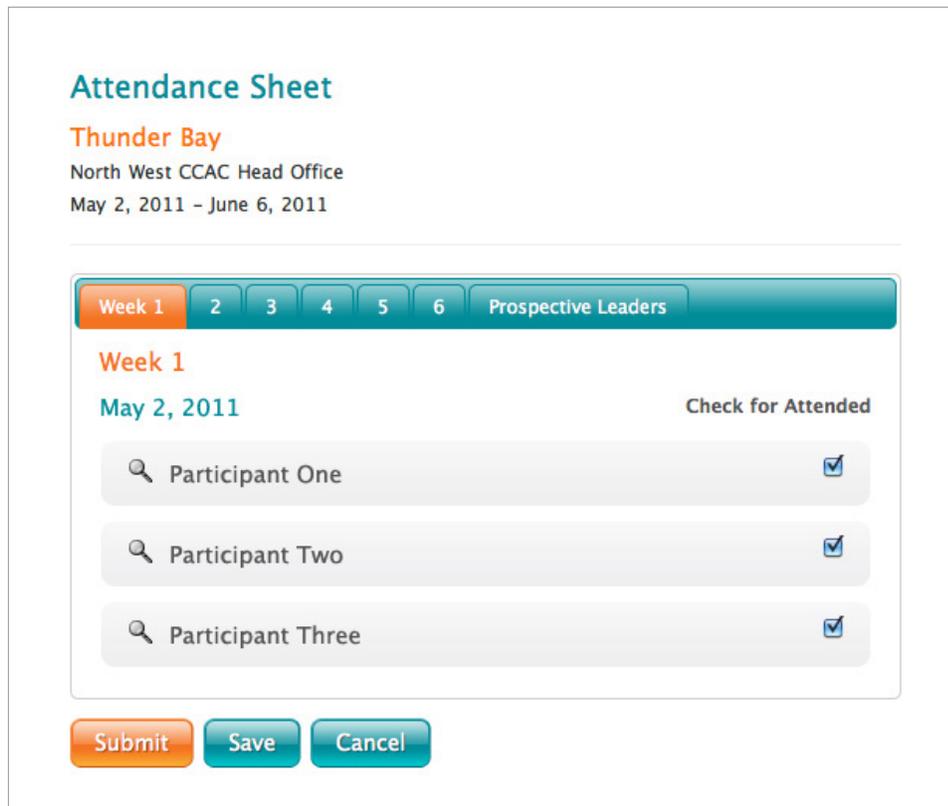
5. Attendance Sheet

Click the Participants > **Attendance Sheet** button in the navigation.

Upcoming workshops will display in a list.

Click the magnifying glass icon to View the workshop attendance.

Click the pencil icon to Edit the attendance sheet.



The screenshot shows the 'Attendance Sheet' interface for a workshop titled 'Thunder Bay' at the 'North West CCAC Head Office' from 'May 2, 2011 - June 6, 2011'. At the top, there are tabs for 'Week 1', '2', '3', '4', '5', '6', and 'Prospective Leaders'. The 'Week 1' tab is selected. Below the tabs, the date 'May 2, 2011' is displayed, along with a 'Check for Attended' button. A list of participants is shown, each with a magnifying glass icon and a checked checkbox: 'Participant One', 'Participant Two', and 'Participant Three'. At the bottom, there are three buttons: 'Submit', 'Save', and 'Cancel'.

The attendance sheet displays each date as a series of selectable tabs. Select the tab for the week that is to be updated.

Check each participant that attended the workshop for the selected week. If any participants are interested in becoming peer leaders, check them accordingly in the **Prospective Leaders** tab.

To save changes to the attendance sheet, click **Save**.

Once the workshop is finished, click **Submit** to send the final attendance sheet to CCAC.

6. Registering Participants

To register a participant, click the **Register** button in the navigation. Select a workshop to register for or click Waiting List Registration.

The email field is recommended but not required when a leader is registering a participant. Otherwise the registration form is the same.

Waiting List Registration

First Name *

Last Name *

Gender

Male Female

Address *

City *

Postal Code *

Phone Number *

Email (Recommended)

Step 1 of 4



7. Email Confirmation

When users are registered for the waiting list, they must confirm the registration via email.

Healthy Change
Registration Confirmation

Hello Participant,

You have registered for the Healthy Change workshop waiting list.

Please confirm your registration by clicking the confirmation button below:

[Confirm Registration](#)

To be removed from the waiting list, [click here](#).

If users are registered for a specific workshop, they must accept or decline the registration.

Please confirm your registration to this workshop by clicking one of the following options:

[Attend in Person](#) [Attend via Videoconference](#) [Decline](#)

To be removed from the waiting list, [click here](#).

If no email address is provided, prompts will display to contact the participant by phone.



8. Support

For information or assistance, please contact:



Charlene Snow
Chronic Disease Self-Management Training Supervisor
Toll Free: 1-800-626-5406 Ext: 2297
Phone: (807) 766-2824
Email: charlene.snow@nw.ccac-ont.ca

or



Mike Wheeler
Senior Multimedia Developer
Toll Free: 1-866-346-9333
Phone: (807) 346-9333
Email: mike@korkoladesign.com