

*Partnership Development Manager Tool Kit*

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Dear PDM,

Thank you for using our product. This simple guide will allow you to use the site, without any one to one training , with extreme confidence. There is an auto set up guide when you first login, just to get you started. Then, this guide will explain the next steps.

**Logging in for the first time.** You can alter your e-mail address when you come to **edit your profile**, but for now, you need to click the login button (see right), which is on the top right of every website page, using the following details:



E-mail Address:


Password: **123456**

You will now be logged in and looking at the auto set up wizard. It will guide you through the bits you need to add, before you and your members can use the site. There is an order to complete these tasks in. Please read and follow the on screen instructions. You can alter your e-mail address, if you don't want to use the new partnership one that we have given you, when you **edit your profile**. The Auto Set up wizard will tell you when it is complete. **Complete the Auto Set Up Wizard NOW, before continuing reading this document.**


The navigation menu (see below) is set up logically. Your PDM home screen will have all information which is current and which needs attention. For example, if a PLT makes an online claim, you will be notified via e-mail and when you login, you can see the unpaid claims on your PDM home screen. Take a look around the PDM home page and get familiar with the look. Notice that your set up tasks should now have green icons to say they have been completed.

[PDM Home](#) | [Members](#) | [Events](#) | [Courses](#) | [Resources](#) | [Online Forms](#) | [Virtual Leagues](#) | [Gallery](#) | [To Do](#) | [PLT Claims](#) | [Add Content](#)

The Home Screen has coloured icons, which let you know if anything needs doing at a glance

Green indicates that the task needs no attention 

Orange indicates that the task has been started, but may require some more attention 

Red indicates that action is required 

This status symbol system is used throughout the site for your ease and convenience

Now that you have looked around the home page, let's begin to add to the site, so that all your members can use it. You will need to add members, or have them apply for membership before they can login and use it. Click the **Members** tab and the members sub navigation appears on the left. It is always a good idea to read the **Tips** section before you proceed.

**Adding Members yourself:** Just click the add member link and complete the form. Then e-mail address you use for your members will display on then public site and when you add a member, the system will automatically send them their membership details, so that they can login straight away.

We recommend that you add your SSCOs's. Then give your SSCOs's the School Sports Co-ordinator Toolkit and have them add their PLT's. (Or just hand out the SSCO and PLT Toolkit and let them get on with it!)

You might ask the Competition manager and FESCO to registers themselves. It's up to you how you manage it and you will know the structure of your partnership and the best course of action.

**Structure of Hierarchy:** As PDM, you can content, delete content, add events and courses, manage claims, add to do tasks and you have complete autonomy over the look of the site.

**SSCO:** They can add events add members to their family, manage events and courses which they add, view PLT claims for schools in their family, add content to most areas, but not all (see the SSCO Toolkit for detailed functions).

**PLT:** They can add content, but it needs approving, claim for days, complete forms and register for events and courses (see PLT toolkit for detailed functions).

See also FESCO, Competition Manager, Admin Assistant, Coach and Assist PDM guides for their functions.

Because of this structure of hierarchy, you will now see that you do not, and should not have to input all the information yourself. Your site will be kept current by its members, whilst you will add current Partnership news and manage PLT claims and the essential monitoring and evaluating. You can set your SSCOs's simple targets of adding a news article for every festival, with a picture or two. They can add events and the Competition Manager can add the Partnership Events.

You could now go along the main navigation and look at each section in more detail. However, you might find it more useful to add some content for your new users. Go to the ADD CONTENT tab at the far right and look at the options in the Add Content Sub Menu. Please note: **When you add content, it will automatically add headlines, titles and text to fit in with the font size, font style and colour of your site.**

Try adding a news article by clicking the news link. Read the Information about adding news before you complete the form. You can even click the links in the information to show you where your news will appear

**PDM Checklist- Tick off the boxes which apply to you as you complete them**

Login and complete the auto set up and mark all tasks as complete.

Register Families

Register Schools

Add Partnership Name

Check Profile

Add Address

Add Event Type

Add School Profile

Add PLT Claim Amount

Set PLT Claim Days

Set PLT Claim E-mail

Add SMS number

I have taken a look around the PDM home page and I know how to get to the following areas from the home page.

Any unpaid PLT claims

Any Course Applications

Any SSCO added Weekly Diaries

Any Evaluations Requiring Approval

Any Members Requiring Approval

Any Content Requiring Approval

Any Events Requiring Approval

Incomplete tasks

Your To Do list

The Master RESET Button

**Adding Members**

I have added my SSCO's  They will apply (not recommended)


I have added my PLT's  My SSCO's will do this

I have added my Competition Manager  He/she will apply

I have added my FESCO  He/she will apply

Remember, you can get your members to apply for membership themselves, but it will be quicker if you follow our guidelines. Any member who applies for membership will need approval by either you or the SSCO who manages the PLT who has applied to become a member and they cannot use the system until they have been approved.

**PDM Checklist-** Tick the boxes when you have found and visited the relevant page or hyperlink. This is a full check list of the remaining sections and their functions. Please take the time to look around and use the site before you give your SSCO's access.

**Members:** I have read the  section.

By default, when you click the members navigation tab, your SSCO's will be shown by default.


You can search, edit and delete members in this section.

If people apply for membership, you can approve them.

You can view members and see how often your members have logged in and when they last logged in.

You can set this number back to 0 at any point (eg the start of every term or year).

You can export your list of members to a spreadsheet.

**Events:** I have read the  section.

When I click the events tab, I see the numbers of schools and pupils who have registered for events in date order.

I can add an event to the calendar.

I know how to edit or delete that event, if I need to.

If a Primary Link teacher adds an event, it will need approval. I know the link used for this.

If the event has online registration, I know how to do this.


Event totals, tell me how many pupils have attended events in any given month.

When an event happens, it will appear in the old events list. I can see who came to any of my old events until I delete them from the calendar.

I can cancel Events. If the PLT'S and SSCO's have added a private mobile number in their auto set up, they will receive an sms to tell them the event has been cancelled.

I can reschedule cancelled events by clicking the Cancelled Events button. All registration details will be wiped so that schools can re register.

**PDM Checklist- Tick the boxes when you have found and visited the relevant page or hyperlink**

**Courses:** I have read the  section.

When I click the courses tab, I see who has applied to go on courses, in date order.

I can add a course to the calendar.

I know how to edit or delete that course, if I need to.

If the event has online registration, I know how to do this.

I know how to print off a course register.


I know how to register on a course.

**Resources:** See Add Content Section

**Online Forms:** This section is still under development. It will be completed by October Half term

Currently, there is a 5 hour offer, which pupils can fill in from the website, under the heading Online Forms

You can view the results of this by clicking “**completed form results**”

Virtual Leagues: I have read the  section.


I can add a league and see how this will benefit the partnership.

I know how to add league results.

I know how to look at current league results and export the results to a spreadsheet.

I know how to look at previous leagues.

**Gallery:** See Add Content Section


**To Do:** I have read the  section.

This can be used as really useful tool. Your SSCOs can add Their PLT action plans to some or all of their PLTs and every time a PLT logs in, they will be reminded of any incomplete action plans. When you set a To Do, you can see who you set it for, and whether they have completed it or not

I can create a task for myself and other members.

I know how to look at tasks which I have set others.

I know how to look at tasks which others have asked me to do.

**PLT Claims:** I have read the  section.

I have set up the PLT claims system in auto set up.


I know how to view unpaid claims.

It might be a good idea to add a claim from a school and view an unpaid claim at this point. You can always delete it.

I know that every PLT can make their own claims. However, if I want, I can make claims for them, by clicking the add claim button.

I know how to view claims. Every year, claims a reset on September 1<sup>st</sup> and I will be able to view any previous year claims as well as the current year.

Please make sure you put an address into the bursar e-mail, even if it yours.

Adding Content: I have read the  section.

I know that I do not need to alter the colour or size of text when I add articles. The site will look much better if I leave it to the default setting.

I know how to get to the **Add Content Set Up Options** (click the words “set up” and how to add to these.

I can add to the About Us Section.

I can add partnership news and family news.

I can add clubs.

I can add coaches.

I can add Links.

I can add Images.

I can add a message which will pop up on the website homepage every time someone looks at it.

I know that when I add content, it will appear on the main site and I will not need to login to view some of this.

Resources and Pictures need a login in order to view them.

Deleting Content. If I want to delete a news article, I need to go to Add Content and click News. All articles which have been added are at the bottom of the page. Scroll down and find the item you want to delete. Select it and click the “Delete Selected Items”.

Don't forget, if you have a play, adding content, leagues, PLT claims and Events and Courses, you can delete it all by clicking the master reset from the PDM home page and selecting which bits you want to delete.

Thank you for completing this document. You should now be confident in using the system. Good Luck!

**We now recommend that you login as an SSCO and PLT to see how easy the system is to use from their point of view.**