# NEO: Training Officer Guidelines

NIBA COLLEGE
of Insurance & Risk Professionals

## General Notice

NEO uses the Capabiliti learning management system which is made available through DPM Consulting.

Information about how to use NEO can be directed to NIBA College on telephone 61 2 9964 9400 or by email on cpd@nibacollege.com.au.

Capabiliti
online learning management system



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**General Notice**



# Contents

***This chapter introduces you to the NEO system, and provides an overview of its features, system requirements and how to get started.***

**In this Chapter…**



# Introduction

# Welcome to NEO

Welcome to NEO, a Learning Management System designed to assist you in managing the continuing professional development needs of your representatives. NEO improves the delivery of training programs by allowing you, in your role as training officer, to access training information and register representatives for NIBA College qualifications and continuing professional development programs whenever and wherever you need.

Through the NEO Registration site you can easily access:

- *All NIBA College distance education courses and workplace assessments on offer*
- *Program content*
- *Available dates*
- *Registration and payment facilities*
- *Representative training history.*

NEO facilitates the management of bookings for all your representatives.

# About This Guide

## Who Is This Guide For?

This NEO Training Manual has been developed for training officers responsible for administering training activities and records for representatives within their organisation. The manual provides step by step instructions on how to perform general functions in NEO including viewing representative training history, updating training records and processing bookings for courses.

## Conventions Used In This Manual

This manual uses many different styles of text and layout to provide step-by-step instructions, notes and other types of information. Conventions have been used to ensure you are presented with a consistent, clear and precise guide to help you find your way around the NEO system.

### Instructions

Instructions are provided in steps, headed with a name telling you precisely what task the instructions help you perform. Following is an example of how instructions are presented:

► **To read step-by-step instructions**

1. Do this…
2. Then do this…

### Screen Elements

Where there are screen names and screen elements such as fields, these are written in **bold**. For example, the **Welcome** screen displays.

### Fields

For fields such as text entry boxes (textboxes), drop-down lists and option buttons, a table is used to describe what should be entered. Sometimes there are mandatory fields, in which case the field names are displayed in bold; for example:

Complete the following optional and **mandatory** fields:

| Field Name | Purpose |
|---|---|
| Textbox Name | Type… Default is… |
| **List Name** | Select… from the drop-down list. |
| Option Button Name | Click… to select. |

## Buttons

Instructions to click a button on the screen are presented as follows:

Click 

.

When you see such an instruction, hover the mouse cursor over the button and tap the primary (usually left) mouse button once.

## Hyperlinks

You are often required to click a hyperlink to jump to a different screen. A hyperlink is some text that is usually a different colour, and may be underlined. When the mouse cursor hovers over a hyperlink, the cursor changes to a hand icon indicating you may click to jump somewhere else.

## Notes

When there is information that is important to mention, but is either slightly off the main topic or too large to fit in a field table, the information is presented as a note, as follows:

---

Note: **Important notes appear in boxes like this.**

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# Getting Started

## Launching NEO

Starting NEO is the same as browsing the Internet using your web browser.

### To launch NEO

1. Open Internet Explorer, which can be found either in the **Start** menu or on you computer's Desktop.

   **To open Internet Explorer from the Start menu:**

   ▶ On the Windows Taskbar, click **Start → Programs → Internet Explorer**.

   **To open Internet Explorer from the Desktop:**

   ▶ On the Windows Desktop, double-click the **Internet Explorer** icon, which usually appears as follows:

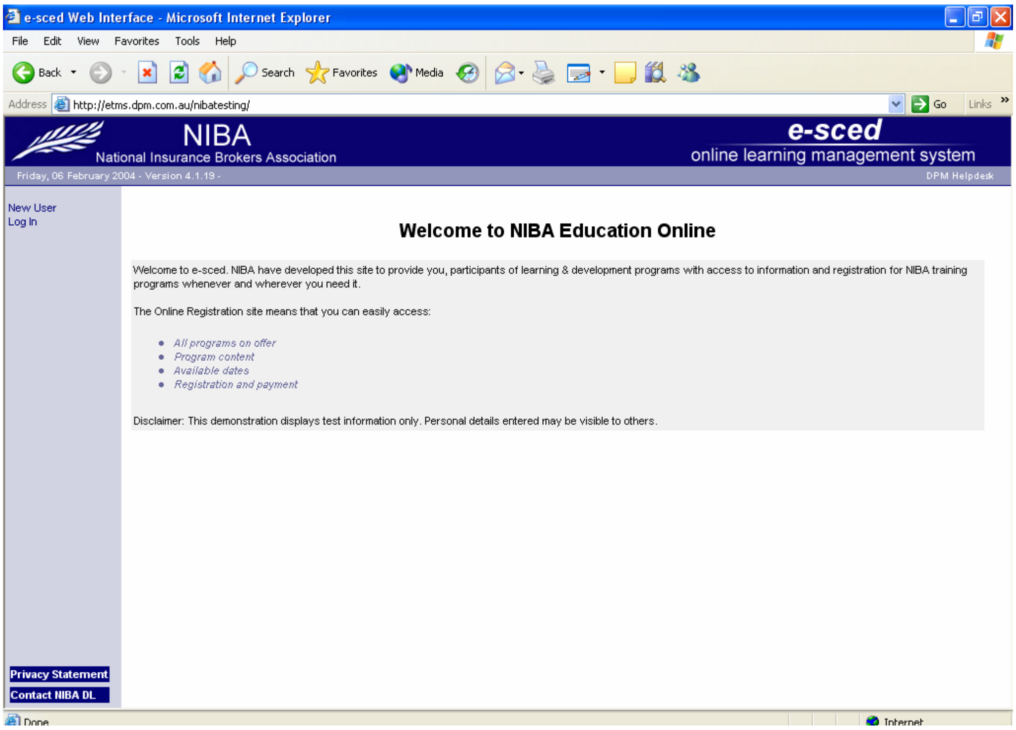
   

   The **Internet Explorer** application window displays.

2. In the **Address** field, type **www.nibacollege.com.au**, Click .

3. Select **NEO** from the **Log In** menu

   The **Welcome** screen displays in the Internet Explorer window.



# Logging In

To protect the privacy of all NIBA College user details, and for security reasons, NEO requires that all users, from representatives to Administrators, log in using a private username and password. The type of role assigned to you will also define which information you are privy to view and edit.

### ► To log in to NEO

From the **Welcome** screen:

1. From the login menu on the left, click the **Log In** hyperlink.

   The **Log In** screen displays.

2. Complete the following relevant fields:


| Field Name | Purpose |
|---|---|
| Enter User Name | Type your Client Number. This information can be provided by an administrator or by registering as a new user. For more information see *New User Registration* in this chapter. |
| Enter Password | Type your NEO password. |

3. Click Log In.

   You will return to the **Welcome** screen with your full name displayed at the top of the screen.

**Note:** If your login credentials are incorrect, you will return to the **Log In** screen with the message 'Login Incorrect'.

## Forgotten Password

If you are a registered user of NEO and you have forgotten your password, a facility is provided to resend your login information to you via e-mail. Please contact NIBA if you encounter any problems.

► **To obtain forgotten login information**

From the **Welcome** screen:

1. From the login menu on the left, click the **Log In** hyperlink.

   The **Log In** screen displays.

2. Click Forgot my password.

   The **Forgot My Password** screen displays.

3. Complete **one** of the following relevant fields:

| Field Name | Purpose |
|---|---|
| Please enter your e-mail address below | Type your e-mail address. This must match the e-mail address you used to register. |
| Please enter your Client Number below | Type your client number. This must match the client number you used to register. |

4. Click Submit to e-mail address.

   The **Forgot My Password** screen displays with the message 'Your username and password will be sent to that e-mail address'.

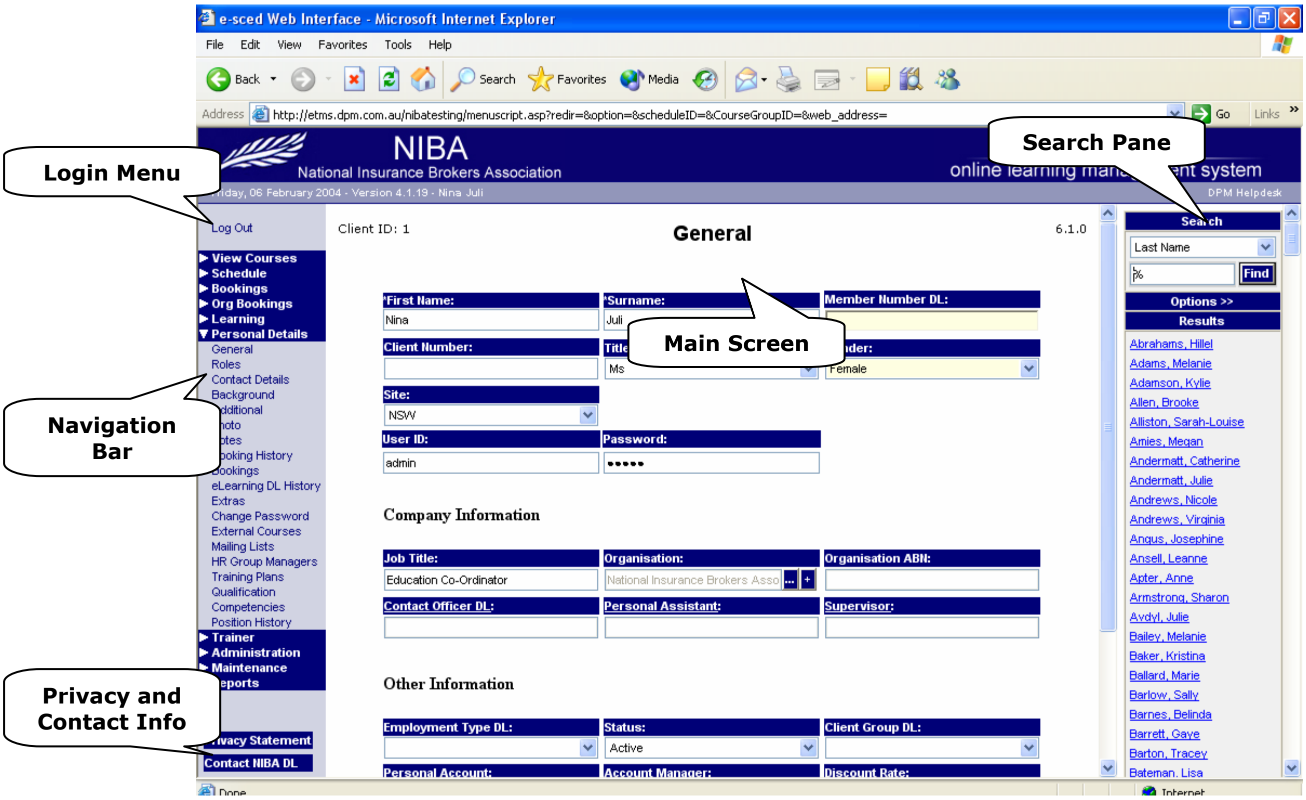
**Note:** If you enter an incorrect e-mail address or Client Number, the **Forgot My Password** screen displays with the message 'There is no username and password with that e-mail address' or 'There is no username and password with that Client Number'.

# Navigation

This section is designed to give you a basic feel for how to move about within the NEO site.

## The NEO Screen Layout

The NEO screen is organised into several components, which are outlined below. All screens are displayed within the Internet Explorer window.




Elements of the NEO screen include:

- **Login Menu** allows you to register as new user, or to log in to NEO. The user registration is for representatives, to enable them to book onto courses or seminars.
- **Navigation Bar** provides navigation around the main areas of NEO. Before logging into the application, the side menu only allows you to browse or search for courses. The Navigation Bar allows quick entry to all parts of the system to which you have been granted access. For more information see *Using the Navigation Bar* below.
- **Privacy and Contact Info** provides links to the relevant privacy statement or to view the contact information for your organisation.
- **Main Screen** is where much of the application information is displayed, and where you perform the majority of the tasks. The first screen displayed in this area is the Welcome screen.

► **Search Pane** will display on the right of the screen when it's pertinent to the main screen contents. The Search Pane can be used to locate an individual, an organisation, a trainer or a course. For more information see *Using the Search Pane* below.

## Using the Navigation Bar

The Navigation Bar is a menu system that is organised into all the functional areas of NEO. Based on your role, the menu items available in the Navigation Bar vary from normal representatives to full system administrators. Following is an example of the menu available to a Training Officer:


By default, menu items in the Navigation Bar appear 'collapsed'. That is, none of the sub-menu items are visible, and an arrow to the left of the menu item points to the right.

To 'expand' a menu to display its sub-menu items, click the menu item. Any available sub-menu items will roll down below, and the arrow to the left of the menu item will point downwards.

In most cases, clicking a sub-menu item will take you to the relevant screen. For example, if you click the **Advanced Search** sub-menu item, the **Advanced Search** screen displays in the main screen area.

## Using the Search Pane

The Search Pane appears on the right of the screen to allow selection of a person, organisation or course. Being context sensitive, the Search Pane is available only from the appropriate screens, for example the **General** screen of the Personal Details area. Below is a typical view of a Search Pane.

### ▶ To use the Search Pane to find and select an entity

1. Select search criteria from the drop down list in the **Search** area. This usually comprises of a search field and search text.

> **Note:** You may type just the first few letters of the name or the wildcard '%' in the search text field if you wish.

2. Select any additional search criteria from the **Options** area. Click to expand or collapse the **Options** area as shown below.
3. Click Find.

   The **Results** area displays a list of any entities that match the criteria.
4. Click the hyperlink to select an entity from the **Results** area.

   The selected item becomes the focus for the main screen area. For example, in the **General** screen in the Personal Details area, selecting a person from the Search Pane loads their details into the main screen.


# NIBA Education Online Assistance

For assistance with NEO please contact NIBA by email: cpd@nibacollege.com.au

***This chapter focuses on the View Courses menu options, which allows you to view the list of available NIBA programs such as seminars, workplace assessments, distance education courses and traineeships that have been scheduled to run over a set period of time.***

**In this Chapter…**



# View Courses

# Finding a Course

The View Courses area offers two methods for locating a NIBA College course such as a seminar, workplace assessment, distance education course or traineeship which are Course Browse and Advanced Search. This section describes how to find a course using each of the two methods.

## Finding a Course

### Using Course Browse to Find a Course

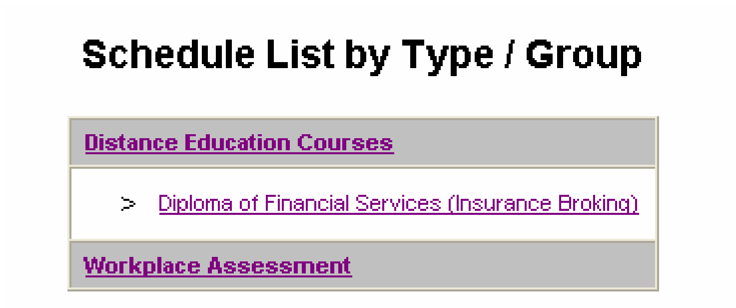
The *Course Browse* menu option allows you to find a course scheduled in NEO by browsing through the available *course groups* and *course types*.

#### ► To browse for a course

1. On the Navigation Bar, click **View Courses → Course Browse**.

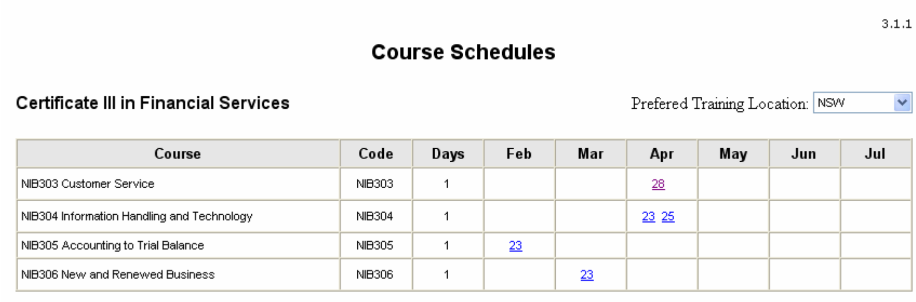
   The **Schedule List by Type / Group** screen displays, offering a list of course types or course groups.

2. Click a course type name to expand its list of course groups as shown below.




3. Click a course group name.

   The **Course Schedules** screen displays, offering a list of course schedules in the selected course group as shown below.




| Course | Code | Days | Feb | Mar | Apr | May | Jun | Jul |
|---|---|---|---|---|---|---|---|---|
| NIB303 Customer Service | NIB303 | 1 | | | 28 | | | |
| NIB304 Information Handling and Technology | NIB304 | 1 | | | 23 25 | | | |
| NIB305 Accounting to Trial Balance | NIB305 | 1 | 23 | | | | | |
| NIB306 New and Renewed Business | NIB306 | 1 | | 23 | | | | |

4. To view courses that are scheduled in a different location:
   - Select a location from the **Preferred Training Location** drop-down list.

5. To view an outline of a course:
   - If the course name is displayed as a hyperlink, click the course name.
   - The **Course Outline** screen displays in a new Internet Explorer window.
   - When finished, click  to close the window.

6. To view the details of a schedule:
   - In the calendar area, click the date number hyperlink to view the details.
   - The **Schedule Details** screen displays.
   - For more details on how to book onto a schedule from the **Schedule Details** screen, refer to *Booking onto a Course* below.

## Using Advanced Search to Find a Course

If you already have an idea of what course you would like to view, and do not want to have to browse through all the other courses to get to it, you might find the search utility very useful.

Following is a table showing various things you can type into search fields, and what the results would be.

| Search Character | Results |
|---|---|
| Nothing | All entries would be returned. |
| First few characters | All entries beginning with the letters entered would be returned. |
| % | Wildcard. Used alone or before a letter or word, everything that contains that letter or word would be returned. |

### ▶ To search for a course

1. On the Navigation Bar, click **View Course → Advanced Search.** The **Advanced Search** screen displays.


2. Complete the following optional search fields to narrow down the search results:

| Field Name | Purpose |
|---|---|
| Course Type | Always select Face to Face |
| Sort By | Select the data you want to use to sort the search results. Defaults to 'Start Date', and always sorts in *ascending* order. |
| Course Code* | Type the course code if known. |
| Course* | Type the name of the course if known. |
| Site | Select a site from the drop-down list if known. Defaults to blank (returns any site). |
| Start Date | Select a start date using the day, month and year drop-down lists. Defaults to blank (returns any start date). |
| Module ID | Enter the module ID for the course schedule |

**Note:** Some fields above (marked with an asterisk *) allow you to enter search characters. See *Search Characters* on page 14 for more information about what may be entered into these fields to assist you in your search.

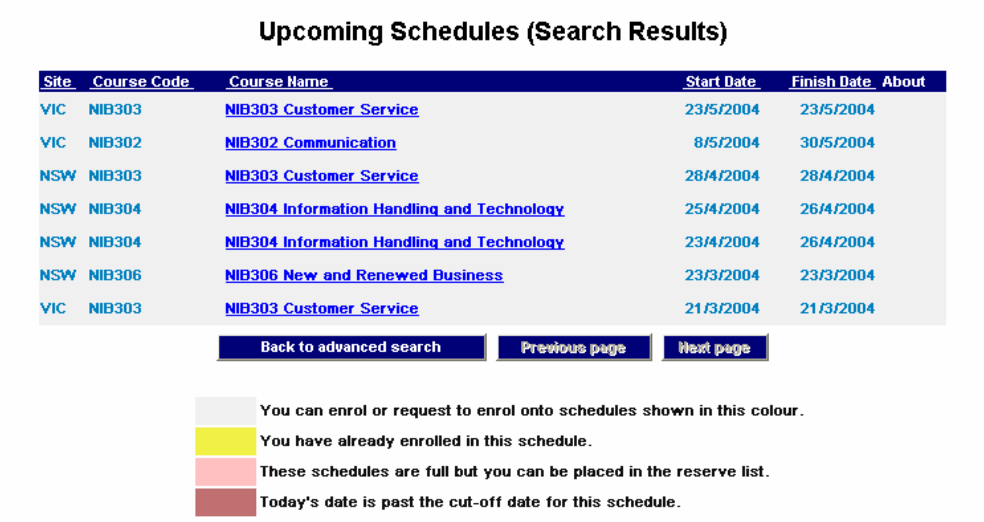
3. To clear the search fields, click 

.

4. To perform the search, click 

.

   The **Upcoming Schedules (Search Results)** screen displays with a list of course schedules that match the search criteria.



**Upcoming Schedules (Search Results)**

| Site | Course Code | Course Name | Start Date | Finish Date | About |
|---|---|---|---|---|---|
| VIC | NIB303 | NIB303 Customer Service | 23/5/2004 | 23/5/2004 | |
| VIC | NIB302 | NIB302 Communication | 8/5/2004 | 30/5/2004 | |
| NSW | NIB303 | NIB303 Customer Service | 28/4/2004 | 28/4/2004 | |
| NSW | NIB304 | NIB304 Information Handling and Technology | 25/4/2004 | 26/4/2004 | |
| NSW | NIB304 | NIB304 Information Handling and Technology | 23/4/2004 | 26/4/2004 | |
| NSW | NIB306 | NIB306 New and Renewed Business | 23/3/2004 | 23/3/2004 | |
| VIC | NIB303 | NIB303 Customer Service | 21/3/2004 | 21/3/2004 | |

Back to advanced search | Previous page | Next page

You can enrol or request to enrol onto schedules shown in this colour.
You have already enrolled in this schedule.
These schedules are full but you can be placed in the reserve list.
Today's date is past the cut-off date for this schedule.

**Note:** If there are more than ten results displayed, use the **Next page** and **Previous page** buttons to move between pages of results.

5. To perform another search:
   - Click **Back to advanced search**.
   - You return to the **Advanced Search** screen. Go to **step 2** above.

6. To change the sort ordering of the results:
   - Click the column heading by which you want the results sorted, for example Course Name or Start Date.
   - The results will be sorted by the selected column, in ascending order.
   - Click the column heading again to sort in descending order.

7. To view the details of a schedule:
   - Click the hyperlinked name of the schedule.
   - The **Schedule Details** screen displays.
   - For more details on how to book onto a schedule from the **Schedule Details** screen, refer to *Booking onto a Course* below.

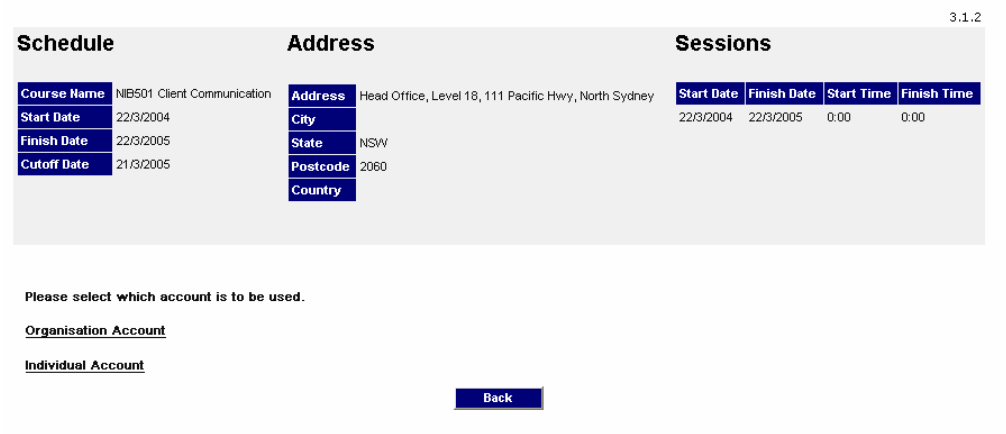
# Booking onto a course

This section details how to book representatives onto a course including processing payment.

### ► To book representatives onto a course

1. Follow the steps *To browse for a course* or *To search for a course* above to locate the course schedule you wish to book representatives onto that is scheduled to run in the future.

   You should be on the **Schedule Details** screen.




2. Select the **Organisation Account** hyperlink.

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**Note:** The **Organisation Account** is only selected if the organisation is paying for the course. If the representative is responsible for paying for the course, the **Individual Account** is selected.

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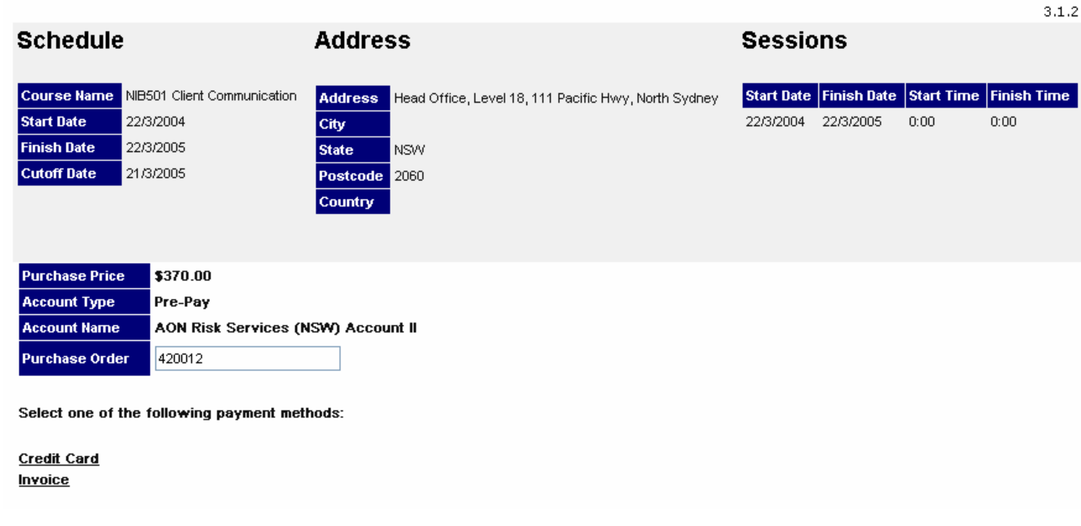
The **Schedule Details** screen will display again as shown below

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**Note:** If the course is free of charge, click Book On.

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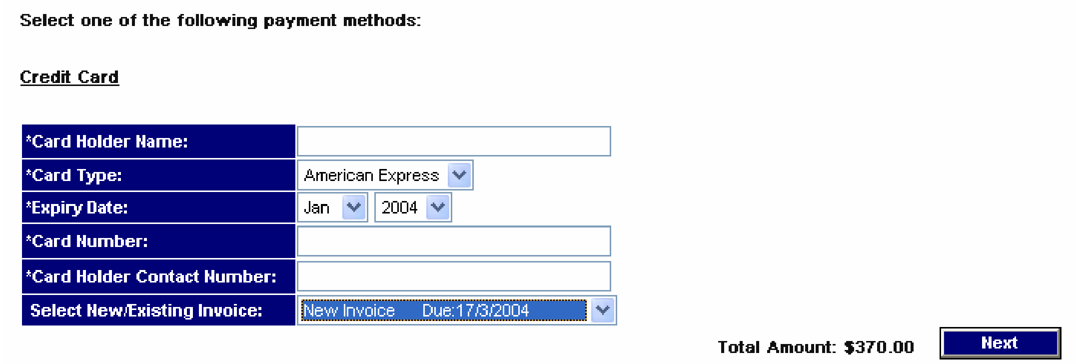
3. To purchase the course using your credit card:
   - Then click the **Credit Card** hyperlink as the payment method.
   - The **Credit Card Details** screen displays.

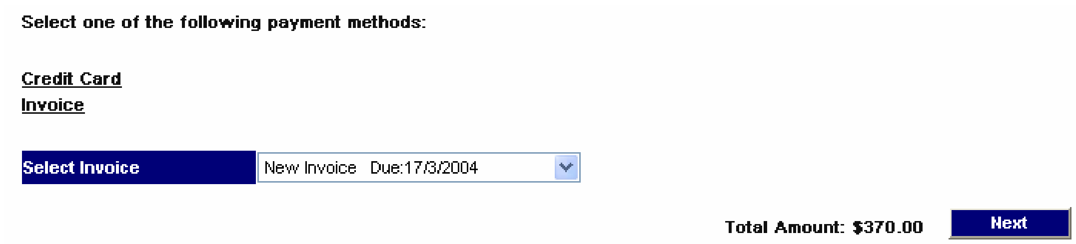



   - Complete the following fields:

| Field Name | Purpose |
|---|---|
| Enter Card Holder's Name | Type your name, or the name that appears on the credit card. |
| Card Type | Select the type of credit card from the drop-down list. |
| Expiry Date | Select the credit card's expiry date from the month and year drop-down lists. |
| Card Number | Type the credit card number. |
| Enter Card Holder's Phone Number | Type your contact telephone number including area code. |
| Select New/Existing Invoice | Select the invoice to be paid from the drop-down list which could be either new or existing |

   - Click **Next**.
   - The **Session and Payment Details** screen displays. Continue from step 5.

4. To purchase the course using invoice:
   - Then click the **Invoice** hyperlink as the payment method. The **Select Invoice** field displays.



- If a **New Invoice** is to be issued for this booking select New Invoice, otherwise select an **Existing Invoice** and the payment for the booking will be added to that invoice number.
- Click **Next**.
- The **Session and Payment Details** screen displays. Continue from step 5.

5. In the **Search Personnel** Field enter either;
   - **For an individual booking**, the last name of the representative to be booked onto the course and click **Find**
   - **For a group booking**, the Wild Card i.e. % to display all representatives in your organisation and click **Find**
   - The search pane will then display the representative's name or list of representative names.

---

**Note:** If the representative to be booked does not appear in the system, select **Enter New Person** and the **Please Enter Your Details** window displays. Enter the representatives details accordingly and click **Save** and continue from step 5.

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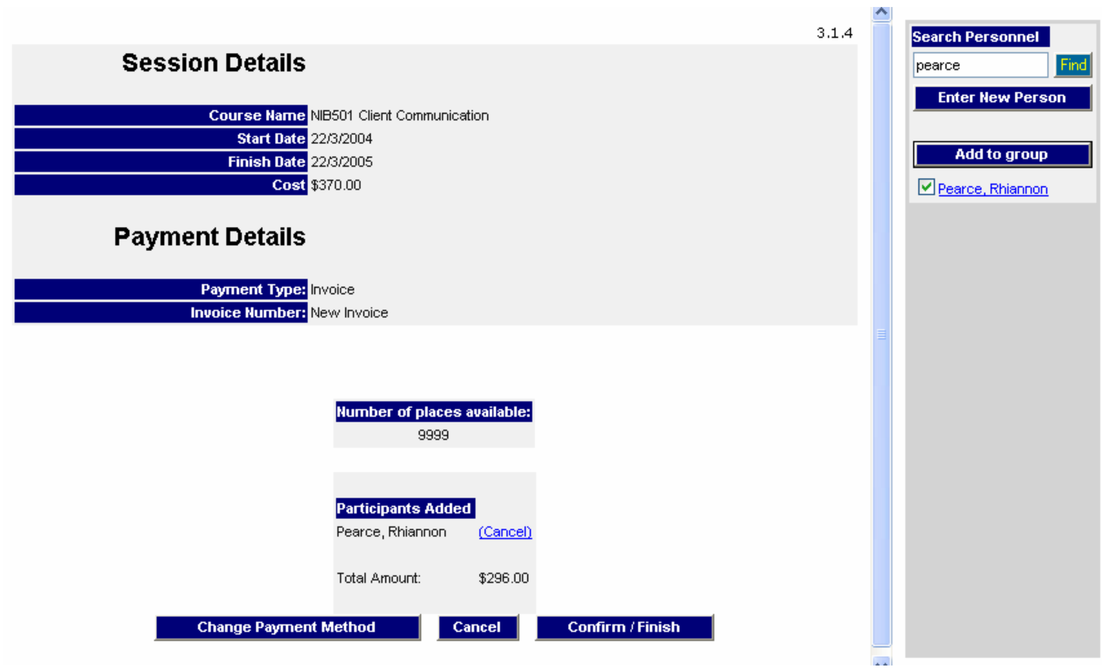
6. To book an representative or group of representatives;
   - At the search pane, place a **Tick** in the checkbox beside the representative/s that need to be booked onto the scheduled course.
   - Click **Add to group**



**Note:** If you wish to view the details of an representative before booking them onto the course, select the representative name hyperlink from the search pane which will take you to the General screen under Personal Details menu.

- All representatives that have been added will then be displayed to the **Participants Added** box.

7. To remove an representative from a booking:
   - Click the **Cancel** hyperlink beside the representative's name in the **Participants Added** box.
8. To cancel a whole booking:
   - Click Cancel .
   - A pop window will appear warning you that representatives will not be added to the booking, click **OK**.
9. To change payment method for a booking:
   - Click Change Payment Method .
   - This returns you to the **Schedule Details** page.
   - Select the alternative payment method by clicking the **payment method hyperlink** and complete steps 3 or 4.
10. To confirm and finalise a booking:
    - Click Confirm / Finish
    - The **Confirmation** screen will display confirming that all participants have been added to the schedule.
    - If you wish to book more representatives onto the schedule click the **Add More Participants** button which will return you to the previous page, then complete step 6.
11. To view the invoice for the booking:
    - From the **Confirmation** screen, click Print Invoice .
    - The invoice displays in a new browser window. The **Print** dialog displays automatically for you to print the invoice.
    - Select the required print options, then click Print .
    - When finished, click to close the invoice window.
    - You return to the **Confirmation** screen.

***This chapter will show you how to view your current bookings and booking history as well as view the schedule details for NIBA courses you are booked on. For instructions on how to view bookings and booking requests for representatives you are responsible for refer to Organisation Bookings.***

**In this Chapter...**



# Bookings

# Booking History

Once you have attended a course, the booking is added to your booking history. The Booking History area allows you to view the list of all courses you have attended, and find out detailed information such as:

- which course it was,
- when it was run, and
- the grade you were awarded, if applicable.

Similar to Current Bookings, you can also review a full history of the enrolment process of your past bookings.

## ▶ To view your booking history

1. On the Navigation Bar, click **Bookings → Booking History**.

   The **Booking History** screen displays.

   **Booking History**

   | Course Name | Start Date | Finish Date | Grade | History |
   |---|---|---|---|---|
   | Excel 2002 - Introductory XP | 12/9/2002 | 12/9/2002 | | View |
   | Leadership in the Workplace | 30/9/2002 | 1/10/2002 | | View |
   | Exceptional Customer Service | 3/10/2002 | 4/10/2002 | 30 | View |
   | Working with VBA in Access 97 | 28/10/2002 | 29/10/2002 | | View |
   | Introduction to ASP .NET (Visual Studio .NET Beta 2) | 26/11/2002 | 2/12/2002 | | View |
   | Exceptional Customer Service | 13/12/2002 | 14/12/2002 | 20 | View |
   | Project 98 - Introductory/Intermediate | 17/12/2002 | 18/12/2003 | | View |
   | Advanced Skills for Office Professionals | 3/2/2003 | 4/2/2003 | 20 | View |
   | CIW Associate - Web Page Authoring Fundamentals | 10/2/2003 | 11/2/2003 | | View |
   | Writing e-sced Online Documentation | 19/6/2003 | 19/6/2003 | | View |

2. Review the information about your past bookings, such as the course name, start and finish dates, and your grade if applicable.
3. To view the history of a booking:
   - Click the **View** hyperlink from the **History** column for the required booking.
   - The **Booking Details** screen displays.
   - Review the information, such as start and finish dates, and the history of the enrolment process.
   - When finished, click **Back** to return to the **Booking**

***All people that have been entered into NEO have information recorded against them personally, such as general details, qualifications, notes and representative external NIBA College training history.***

***As a Training Officer this chapter explains how to view qualifications and competencies assigned to representatives you are responsible for, add notes regarding a representative as well as view their general details.***

**In this Chapter…**



# Personal Details

# Basic Personal Details

The **Personal Details** area enables you to view and edit information associated with the representatives you are responsible for within your organisation.

The first time you visit this area, the default details displayed will be your own. To view or edit details for another person in the system, you will need to do a search to locate them. Refer to *Using the Search Pane* in the chapter *Introduction*.

## General

The **General** screen contains basic identification details for a person. In this section you will only be able to view the representatives that belong to your organisation.

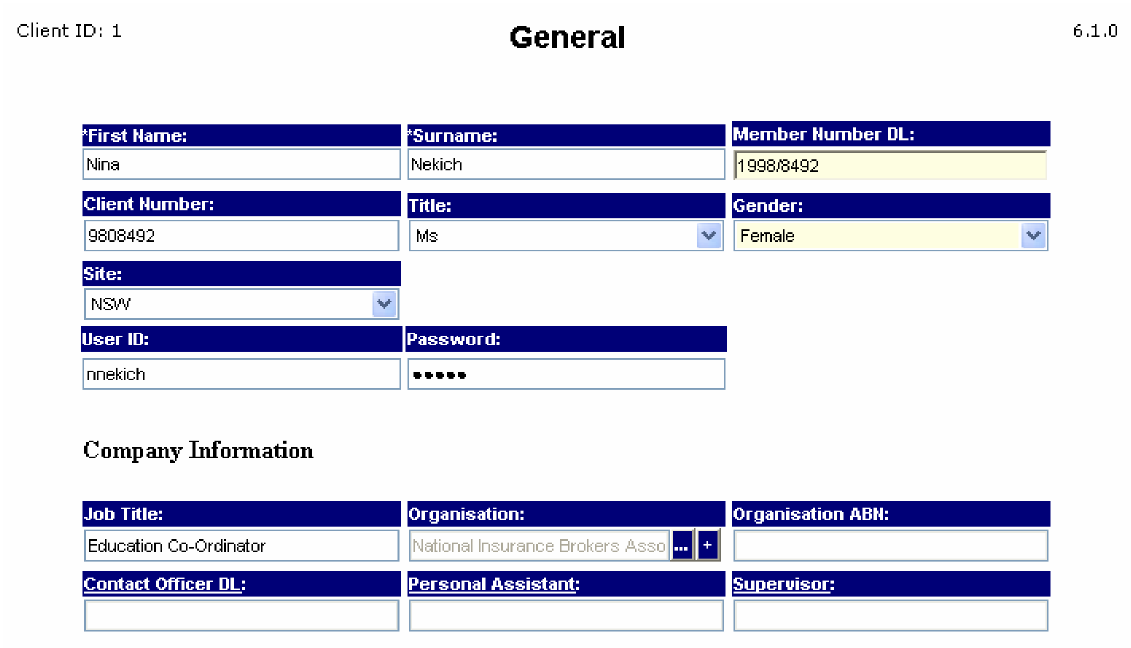
### ► To view an representative

1. On the Navigation Bar, click **Personal Details → General.**

   The General screen displays. By default, this screen will display your details.

2. At the search pane enter the representative's name you wish to view details for and click **Find** or alternatively use the wildcard '%' and select the representatives name

   The **General** screen displays.



3. The General screen will display the following information about an representative:

| Field Name | Purpose |
|---|---|
| **Personal Details** | |
| Title | Select your preferred title from the drop-down list. Defaults to 'Mr'. |
| **First Name** | Type your first name. This field is always mandatory. |
| Middle Names | Type your middle name(s) if appropriate. |
| **Surname** | Type your surname. This field is always mandatory. |
| Gender | Select your gender from the drop-down list. |
| Phone | Type your telephone number, including the area and country codes where appropriate. |
| Membership Number | NIBA Membership Number |
| Client Number | This is a unique, dynamic, value and is usually assigned by the Administrator. |
| **Site** | Type the name or location of the site of your organisation where you work, if applicable. |
| **Business Details** | |
| Job Title | Type your job title. |
| Organisation | Type the name of your organisation. |
| Organisation ABN | Type the Australian Business Number for your organisation. |
| Contact Officer | Type your contact officer's name, if applicable. |
| Personal Assistant | Type your personal assistant's name, if applicable. |
| Supervisor | Type your supervisor's name, if applicable. |
| **Other Information** | |
| This section provides representative's account details. | |

4. To view another representative's details, at the search pane enter the representative's name and click **Find**.

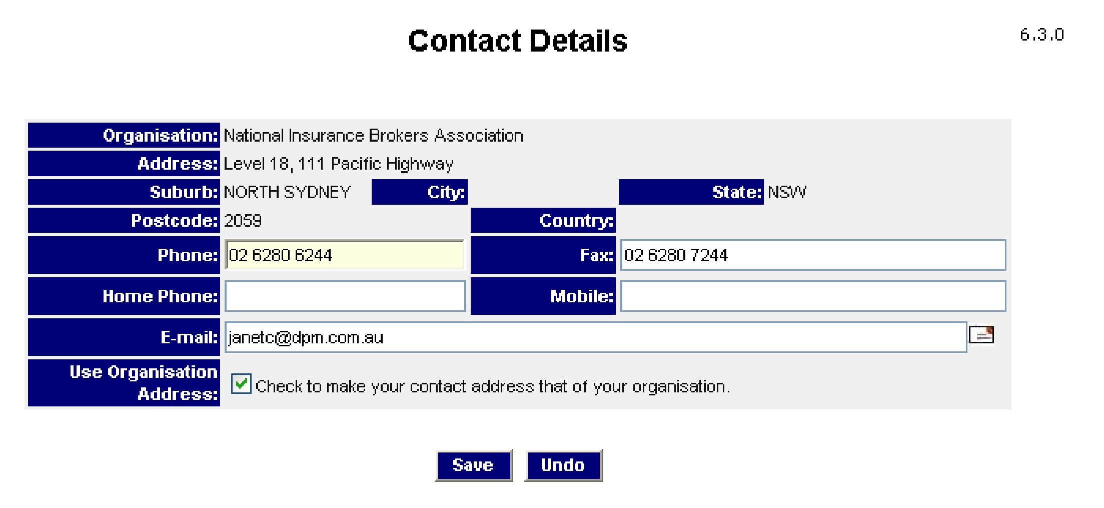
## Contact Details

This screen is used to view the contact details for the selected representative.

### ► To view contact details

1. On the Navigation Bar, click **Personal Details → Contact Details**.

   The **Contact Details** screen displays.




2. To view another representative's details, at the search pane enter the representative's name and click **Find**.

### ► To email the selected person

3. Click the button next to the e-mail field. If an email address has been defined, a new mail message will be created using your default email application.

## Notes

This section allows you to store custom notes about a representative such as general comments or notes which is visible to that person. This enables you to capture different information about a person.

### ► To enter notes for an representative

1. On the Navigation Bar, click **Personal Details → Notes**.
2. Select a **Note Type** from the list.
3. Enter text for the note in the **Note** textbox.
4. Click **Save** to apply changes.

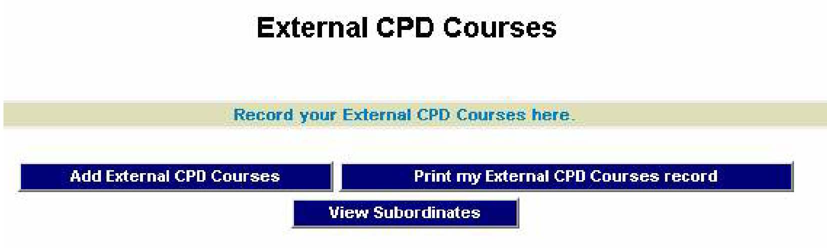
# External CPD Courses

This section enables you to record details of external CPD hours, ie: those to be counted towards the representatives ASIC requirements for Continuing Professional Development, not administered through NIBA College. For more information visit www.nibacollege.com

## ► To view external courses

1. On the Navigation Bar, click **Personal Details → External Courses**.

   The **External CPD Courses** screen displays.



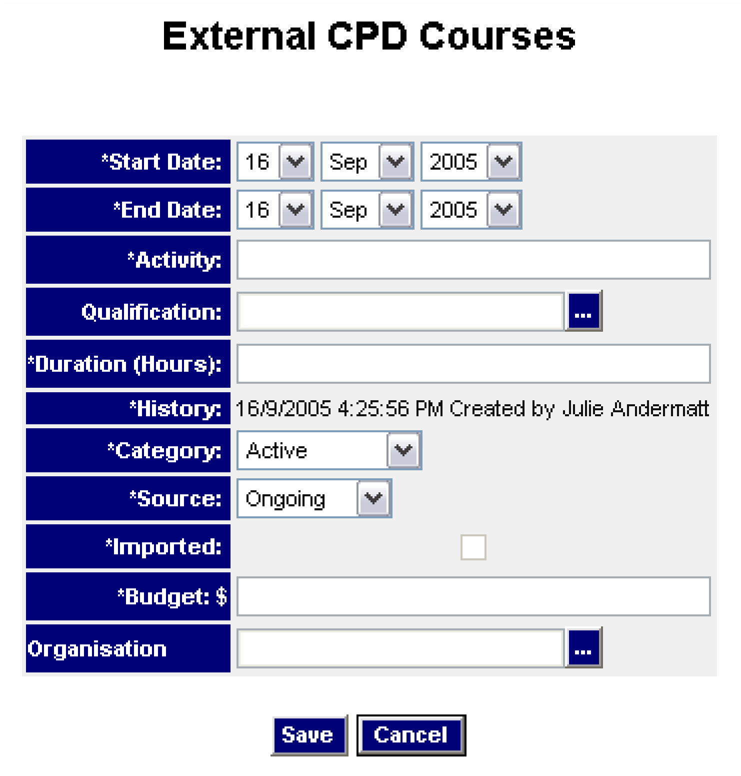

2. The list of external courses attended by the person will be listed, showing all the details as entered above.
3. To view other staff members records, enter '%' in the search field on the right hand side and click **Find**


## ► To add an external course

1. On the Navigation Bar, click **Personal Details → External Courses**.

   The **External Development Courses** screen displays.
2. Click 

3. Complete the following fields:




| Field Name | Purpose |
|---|---|
| Start date | Select the date the course started. |
| End date | Select the date the course ended. |
| Activity | Type the name of the course, and the NIBA College accreditation number if known |
| Qualification | Leave this field clear |
| Duration (Hours) | Type the length of the course in hours. |
| Category | Leave as Active |
| Source | Leave as ongoing |
| Imported | Leae empty |
| Budget | Type Zero '0' |
| Organisation | Select the host organisation |

4. Click **Save** to apply changes.

---

**Note:** Click **Add Details** to add further details about an external course and click Save to apply the changes. Refer to external course comments below.

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## ► To edit an external course

1. On the Navigation Bar, click **Personal Details → External Courses**.

   The **External Development Courses** screen displays.

2. Select the **External Course** hyperlink to be edited.

3. Edit the fields as required:
4. Click **Save** to apply changes.

### ▶ To delete an external course

1. On the Navigation Bar, click **Personal Details → External Courses**.

   The **External Development Courses** screen displays.
2. Select the **External Course** hyperlink to be deleted. This will display the details of the external development course.
3. Click **Delete Course**
4. A message box will appear prompting you to click Ok to delete the course. Click **OK** to confirm the deletion.

## Booking History

Refer to *Booking History* in the *Bookings* chapter.

## Qualifications

This section allows you to view information about the qualifications held by an representative within your organisation.

### ▶ To view a qualification

1. On the Navigation Bar, click **Personal Details → Qualification**.

   The **Qualifications** screen displays.

**Qualifications**

Details for Nina Nekich

| Code | Qualification | Completed | Start Date | Finish Date |
|---|---|---|---|---|
| FNB50199 | Diploma of Financial Services | No | 22/1/2004 | 26/4/2004 |

Add | Batch Add | View Subordinates

2. The qualifications for the selected representative are shown by default. To view qualifications for a different representative, use the search pane. Refer to *Using the Search Pane* in the chapter *Introduction*.
3. Click the link for a qualification to view the full details.

***As a Training Officer you will have access to some reports that you may find useful for keeping track of your staff's learning progress.***

**In this Chapter…**



# Reports

# Summary of Reports

**Attendances vs Enrolments Report by Participant**
Provides a report on which events participants have enrolled and whether or not they attended.

**External CPD Courses**
Provides a report listing participants and their External CPD Courses

**Full Participant List**
Provides a list of all people entered on the NEO: Records Management System with contact details

**IDP**
Provides a breakdown of participants and their individual enrolment history

**Organisation Booking History**
Provides a breakdown of organisation bookings over a specified date range

**Participant Enrolments by Course**
Selecting a particular course, shows organisations participation

**Personal Training History**
Show a participants training history over a specified date range

**Personnel Roles**
Show's roles designated to participants from a particular organisation

**Upcoming Schedules List**
Shows the upcoming events for a particular region

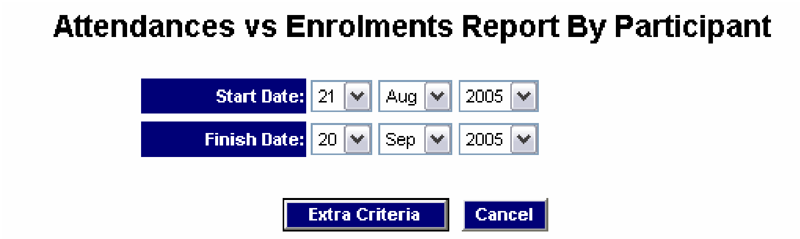
# How to Run a Report

▶ **To run a report**

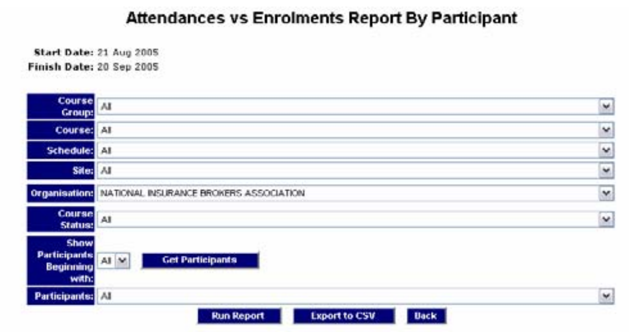
4. On the Navigation Bar, click **Reports → Reports**.

   The **Reports** screen displays.


5. Select ALL for a list of all available reports.
6. Select your chosen report.
7. Enter the information as necessary




8. If available, select extra criteria




9. Enter further information
10. Select run report OR if you would like the data in Microsoft Excel format select Export to CSV