

# e-professional

v 1.8.3.3

## User Guide

*for*

**Accredited Training Organisations**

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## Foreword

### Scope

This user guide is for the purpose of accredited training providers to enable them to use the e-professional system for the booking and management of exams and associated tools. Future functionality is expected to follow and this guide will be updated as appropriate.

### Versioning

This guide will reflect the same version number as the application release.

The current software release is: **v1.8.3.3**

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## Introduction

The e-professional Portal is a web-based interface (accessed via a web browser). It allows authenticated users to complete a number of tasks and business processes, regardless of location. By using a permissions based system, it is the login credentials that determine the level of functionality the user will have access to and what system interactions actions they can perform.

There are three types of user roles; each one has a specific landing page. These are defined as:

- BCS Administrator Portal
- Training and Exam Provider (ATO) Portal
- Candidate Portal

This user guide covers the 'Training and Exam Provider (ATO) Portal'.

To access the Training and Exam Provider (ATO) Portal dashboard, enter the URL provided by BCS into your web browser address bar.

*Note: If you do not have a BCS profile you will not be able to use this system. You will need to contact BCS Accreditation to apply for a new accreditation, which will take you through an approval process to become an accredited organisation.*

This application is compliant with the following browsers:

Recommended	Not Recommended		
<b>Optimised for these browsers</b>	<b>The design is optimised in these browsers, but some elements and functionality may be missing or different.</b>	<b>Functionality is expected to be working and free from any errors.</b>	<b>Unknown</b>
<ul style="list-style-type: none"> <li>• Internet Explorer 9.#</li> <li>• Internet Explorer 8.#</li> <li>• Firefox (Latest stable)</li> <li>• Chrome (Latest stable)</li> <li>• Safari (Latest stable)</li> </ul>	<ul style="list-style-type: none"> <li>• Internet Explorer 10.# (will move to A grade soon)</li> <li>• Internet Explorer 7.#</li> </ul>	<ul style="list-style-type: none"> <li>• Firefox 3.#</li> </ul>	<ul style="list-style-type: none"> <li>• Opera (Latest stable)</li> <li>• Browsers for iOS</li> <li>• Browsers for the Android OS</li> <li>• Internet Explorer 6.#</li> <li>• Chrome Beta Channel</li> </ul>



**Caution: Using browsers that are not recommended as listed in the above table may produce unexpected results.**

## Login

*Note: You will not be able to login if you have not been accredited by BCS. To become BCS accredited, please contact the BCS accreditation team.*

To login to the portal, use the credentials supplied by BCS.

Field	Input
Email address	Enter your organisation email address.
Password	Enter your password.  If you have forgotten your password, click on the 'Click here to reset your password' link. The following popup will be displayed. Enter your organisation email address that you used for accreditation and login reset instructions will be sent to that email address.

BCS The Chartered Institute for IT e-professional putting you in control Login

Login

Please login using your email address and password.

Email address \*

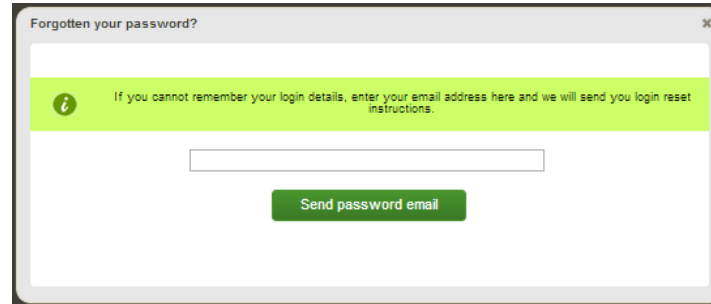
Password \*

Login [Click here to reset your password](#)

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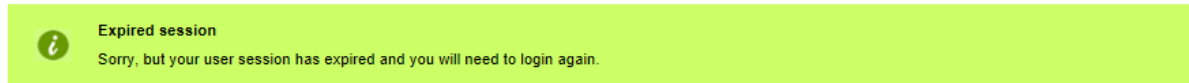
*The Login Page*

## Forgotten Password



## Timeout

If there is a period of inactivity after you have signed in, the system will sign you out and you will see the message below.



Log back into the system as normal to return to the screen you were working on.



## The Training and Exam Provider (ATO) Portal for Accredited Organisations

The Training and Exam Provider Portal allows providers to manage their exams, candidates, accreditation, invoices and account details.

### Dashboard

Your dashboard with your details is displayed after you have logged in and it summarises the following information:

- Upcoming exams
- Exam actions
- Accreditation
- Results Summary

Using the onscreen tabs, you can access all the necessary functions available:

- Exam Manager
- Candidates
- Accreditation
- Invoices
- People (SuperUser access level Only)
- Account

bcsc  
The Chartered Institute for IT  
e-professional putting you in control

Logged in as: BCS ATO Super User [Logout](#)

DASHBOARD EXAM MANAGER CANDIDATES ACCREDITATION INVOICES PEOPLE ACCOUNT

### Dashboard

Hello BCS, here's a glance of your account as it stands today. [2 new notification\(s\)](#)

#### Upcoming exams

APR 17	ISTQB-BCS Certified Tester Foundation Level Fleming Way, Swindon, Wiltshire, SN1 2NG
APR 10	ISTQB-BCS Certified Tester Foundation Level Fleming Way, Swindon, Wiltshire, SN1 2NG
APR 10	ISTQB-BCS Certified Tester Foundation Level Fleming Way, Swindon, Wiltshire, SN1 2NG

[View all upcoming exams](#) | [Book a new exam](#)

#### Exam actions

0	require <b>candidates</b> to be registered
7	require a <b>tutor</b> to be allocated
0	require an <b>invigilator</b> to be allocated

#### Accreditation

0	require a <b>renewal decision</b> to be made
0	have <b>recently lapsed</b>

[Accreditation dashboard](#)

#### Results summary for last 12 months

At a glance for all currently held accreditations:

Exam sittings	Candidates	Pass Rate
70	102	60%

View more detailed analysis with data filtering using our [Results Analyser Tool](#)


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The ATO Dashboard Screen

With the on-page links you can jump to:

- [Upcoming exams - View all upcoming exams](#)
- [Upcoming exams - Book a new exam](#)
- [Accreditation - View the Accreditation dashboard](#)
- [Exam actions - Allocate tutors and invigilators to exam sessions](#)
- [Result Analyser Tool – View results summary data](#)

*Note: If there are bookings with unread messages for you to action, you will see the following notification*

 [1 new notification\(s\)](#)

## Result Analyser Tool

Click on the 'Result Analyser Tool' link to go to the next level of analysis.

*Note: The results summary for the last 12 months shows how many candidates and sitting have taken place in the past we month excluding resit candidates. The data is only for examinations that have been booked on e-professional.*


### Results summary for last 12 months

At a glance for all currently held accreditations:

Exam sittings	Candidates	Pass Rate
70	102	60%

View more detailed analysis with data filtering using our [Results Analyser Tool](#)

Dashboard – Results Summary

Field	Input
Qualifications	Select from current or retired qualifications
Time Period	Select a From and To date using the dynamic calendar by clicking on the calendar icon to display a popup calendar. 
Tutors	Select a tutor from the list
Resits	Select to Include resits, Exclude resits or display Resits only
Display Format	Select to display by Qualification or Tutor
	Click [Run Analysis]

## Results Analyser

### Exam Results Analysis

Qualifications  All qualifications

Time period  All dates

Tutors  All tutors

Resits  Include resits  Exclude resits  Resits only

Display format  By qualification  By tutor

The Results Analyser Selection Screen

The Results Summary and Results Detail are displayed by the chosen Display Format.

*Note: Click on the 'Run another analysis' button to return to the Results Analyser Selection screen.*

**Results Analyser**

**Exam Results Analysis**

Analysis Query

Qualifications	All qualifications
Time period	All dates
Tutors	All tutors
Resits	Including exam resits
Analysis run on	4 April 2014, 11:05

Run another analysis

**Results Summary**

Exam Sittings	Candidates who sat Exams	Exam Pass Rate
82	114	61%

Results Detail [Export candidate data to CSV](#) [Export analysis data to CSV](#)

**BCS Specialist Certificate in Business Relationship Management**

	Exam Sittings	Candidates who sat Exams	Exam Pass Rate
Total	1	2	50%

*The Result Analyser Summary Screen*

Double click on the Total line to drill down to the next level.

Double click on the expanded Tutor or Qualification name to view the 'Exam Results Analysis Detail'.

Click on 'Export analysis data to CSV' to export the data into a spreadsheet format.

**Exam Results Analysis Detail**

Qualifications	BCS Specialist Certificate in Business Relationship Management
Tutors	ATO Tutor
Time period	All dates
Resits	Including exam resits

BCS Ref	Your ID	Client	Exam Date	Exam Time	Candidates	Pass Rate
OLEB001034	AW 01/06/2013	Client	01/06/2013	09:00	2	50%

[Export analysis data to CSV](#)

*The Exam Results Analysis Detail Screen*

## Exam Result Candidate Analysis Report

Exam result candidate data can be exported to a spread sheet format by clicking on the link 'Export analysis data to CSV'.

*Note: Resit data is displayed separately in the drill down. Therefore, if an examination sitting contained a re-sit and a non-resit candidate, 2 difference sittings will be displayed. This will also show as 2 sittings in the Exam Sitting summary for the booking when drilling down using the 'Resits included' option.*

*Note: Candidates with results on hold will not be displayed in this report.*

The screenshot shows the 'Results Analyser' interface. At the top, there's a green header with the title 'Results Analyser'. Below it, the 'Exam Results Analysis' section is visible. It includes an 'Analysis Query' section with filters for Qualifications (All qualifications), Time period (All dates), Tutors (All tutors), and Resits (Including exam resits). The analysis was run on 4 April 2014, 11:05. A 'Run another analysis' button is present. Below this is the 'Results Summary' section, which displays three key metrics: Exam Sittings (82), Candidates who sat Exams (114), and Exam Pass Rate (61%). The 'Results Detail' section includes links to 'Export candidate data to CSV' and 'Export analysis data to CSV'. At the bottom, there's a table for 'BCS Specialist Certificate in Business Relationship Management' with a total row showing 1 sitting, 2 candidates, and a 50% pass rate.

The Result Analyser Summary Screen

The report will display the candidate details for the selection with their grade.

	A	B	C	D	E	F	G	H	I
1	Exam Date	BCS Reference	Your ID	PO Number	Qualification Name	Candidate First Name	Candidate Last Name	Candidate Email Address	Result
2	22/01/2014 13:30	EB003680	DE134	PO526	ITIL® Continual Service Improvement Certificate	Aubrey	Smith	aubreysmith@test.test	Pass
3	14/01/2014 10:50	EB003415	DE103	PO496	Certificate in Data Protection	Simon	Smith	simonsmith@test.test	Fail
4	09/01/2014 13:50	EB003316	DE067	PO356	PRINCE2® Practitioner	John	Jones	johnjones@test.test	Pass
5	09/01/2014 13:50	EB003316	DE056	PO322	PRINCE2® Practitioner re-registration	Steve	Smith	stevessmith@test.test	Pass

## Exam Result Analysis Report

Exam result analysis data can be exported to a spread sheet format by clicking on the link 'Export analysis data to CSV'.

*Note: Resit data is displayed separately in the drill down. Therefore, if an examination sitting contained a re-sit and a non-resit candidate, 2 difference sittings will be displayed. This will also show as 2 sittings in the Exam Sitting summary for the booking when drilling down using the 'Resits included' option.*

### Results Analyser

**Exam Results Analysis**

Analysis Query

Qualifications	All qualifications
Time period	All dates
Tutors	All tutors
Resits	Including exam resits
Analysis run on	4 April 2014, 11:05

[Run another analysis](#)

Results Summary

Exam Sittings	Candidates who sat Exams	Exam Pass Rate
82	114	61%

Results Detail [Export candidate data to CSV](#) [Export analysis data to CSV](#)

BCS Specialist Certificate in Business Relationship Management

	Exam Sittings	Candidates who sat Exams	Exam Pass Rate
Total	‡ 1	2	50%

The Result Analyser Summary Screen

The report will display the exam sitting details for the selection with the pass rate.

	A	B	C	D	E	F	G	H	I	J	K	L
	OrganisationName	QualificationName	TutorFirst Name	TutorLast Name	BCSBooking Reference	ATOBooking Reference	ClientName	Venue	Candidate Count	PassRate	ExamDate	ExamTime
1	Test Account - BCS	Certificate in Commercial Awareness	ATO	Tutor	OLEB001275		BCS	Reading, United Kingdom	1	100	03/07/2013	16:30:00
2	Test Account - BCS	Certificate in Commercial Awareness	ATO	Tutor	OLEB001349	1526	BCS	New York, USA	1	0	18/07/2013	14:15:00
3	Test Account - BCS	Certificate in Commercial Awareness	ATO	Tutor	OLEB001418	1752	BCS	Taunton, United Kingdom	1	100	01/08/2013	13:45:00
4												

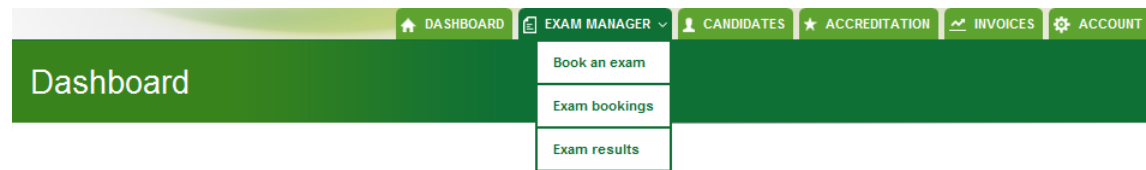
## Exam Manager

e-professional will allow you to book all the exams you are accredited to deliver.

Exam Manager options are accessed from the Exam Manager tab. When you move your mouse over the tab, a dropdown menu is displayed.

### How to book an exam

To book an exam, move your mouse over the Exam Manager tab and click on 'Book an exam' from the dropdown menu. The 'Book an Exam Session' step 1 screen is displayed.



*The Exam Manager Tab*

*Note: There are 6 steps to booking an exam, 5 of which require you to input some information, followed by step 6 which is the confirmation screen that informs you all the necessary information has been gathered.*

## Step 1. Session Information

This screen captures exam session and venue information. You need to complete this screen before you can progress to the next stage.

*Note: The progress steps can be used to navigate to previous screens during the booking process.*

**Field**      **Input**

- Exam format**      Select the exam format from a dropdown list. The options are:
- Online (the exam is completed on a computer)
  - Paper Based (traditional paper exam paper is dispatched from BCS)

The screenshot shows the 'Book an Exam Session' interface. At the top, a green header contains the title 'Book an Exam Session'. Below it is a progress bar with six steps: 1: Session Information (highlighted), 2: Select Exams, 3: Candidates & Papers, 4: Invigilator, 5: Submit Booking, and 6: Confirmation. The main content area is titled 'Step 1: Exam Session Information' and contains the following fields:

- Exam format:** A dropdown menu with 'Paper Based' selected.
- Date:** A text input field with a calendar icon.
- Start time:** A text input field.
- Course type:** Radio buttons for 'Public' and 'Client'.
- Venue:** A dropdown menu with 'Please select from previously saved venues' selected. Below it, a list of venues is shown with radio buttons:
  - Jury's Inn, Fleming Way, Swindon, SN1 2NG
  - BCS, Davidson Building, Davidson Building, 5 Southampton Street, London, WC2E 7HA
  - Wyvern Theatre, Theatre Square, Swindon, SN1 1QN
  - 100 Brook Drive, Reading, RG2 6UJ
  - Client Limited, Wakefield House, Pipers Way, Swindon, SN3 1RE

At the bottom of the form, there are two buttons: 'Continue' and 'Cancel booking'. A footer at the bottom right contains the text: '© Copyright BCS 2014 | Legal and Privacy Notices | BCS is a registered charity: No 292786'.

Step 1/6: Book an Exam Session Screen



**Field**      **Input**

- Date**
- Select the date from the dynamic calendar by clicking on the calendar icon to display a popup calendar.
  - Then select the date by clicking on the desired date on the calendar.
  - Once you have clicked on the date, the calendar will close and the date in numerical format will be displayed in the date field.



- Start time**
- Place your cursor into the Start time field and left mouse click, a time popup is then displayed.
  - Select the time by clicking on the desired hour and minute.
  - Once you have made your selection, click outside of the time popup and it will close.
  - The time in numerical format will be displayed in the Start time field.



- Course Type**      Select the course type by clicking the associated radio button. The options are:
- Public
  - Client

Note: If Client is selected, another field will appear where the client's name is entered.

- Venue**      You have 3 options when selecting a venue:
- Option 1. Select a venue from the dropdown list.
- Option 2. If venues are available, select the venue by clicking the associated radio button.

*Note: Once a selection has been made, venue contact name, venue telephone number and specific venue instructions will be displayed.*

Option 3. Add a new venue. When this link is clicked, you will be led through a process to capture the required information.

**Field**      **Input**

- Country - dropdown list
- Postcode/Zip - txt field. Any UK addresses found with this postcode are displayed. If the address for a venue you wish to use is not displayed, you can add it to the system. You will need to add the following information:
- Company
- Country (mandatory)
- Building/Venue name
- Address line 1 (mandatory)
- Address line 2
- Town/City (mandatory)
- County/State
- Postcode/Zip (mandatory)

Click [Create]

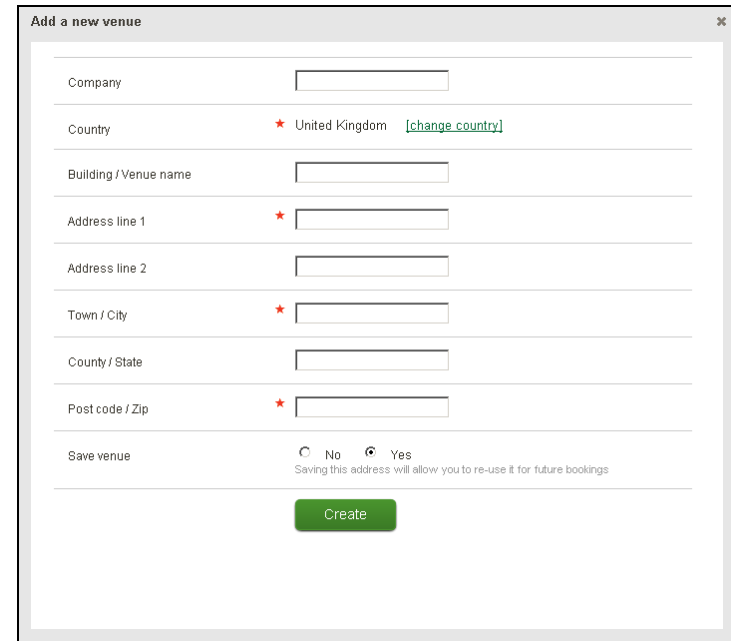
You then have the option to save this address so it can be re-used for future bookings.

**Venue contact name**      This is where a contact name for the venue is entered.

**Venue telephone number**      This is where the telephone number for the venue is entered.

**Specific venue instructions**      This is where any specific venue instructions are entered.

After you have populated all mandatory fields, click [Continue] to carry on to the next step or cancel to cancel the booking.



*Add a new Venue Screen*

## Step 2. Select Exams

This screen displays all the exams that you are accredited to deliver.

The exams are listed in a hierarchical order that you can expand/collapse by clicking on the icon to the right of the exam group. You need to complete this screen before you can progress to the next stage.

When an exam group hierarchy has been fully expanded, the exam title(s) for that group are displayed.

You will notice the expand/collapse icon is now replaced by a check box.

Click in the checkbox(s) of the exam(s) you wish to select for your exam session

After you have populated all mandatory fields, click [Continue] to carry on to the next step or cancel to cancel the booking.

**Book an Exam Session**

1: Session Information 2: Select Exams 3: Candidates & Papers 4: Invigilator 5: Submit Booking 6: Confirmation

**Step 2: Select Exam(s)**

Exam format: Paper Based

Professional Certifications	▼
IT Service Management (ITIL®)	▶
Project Management and Support	▶
Software Testing	▶
Business Analysis	▶
Solution Development and Architecture	▶
Green and Sustainable IT	▼
Foundation Certificate in Green IT	<input type="checkbox"/>
Data Centre Management	▶
IT Governance and Information Security	▶
Software Asset Management	▼
Certificate in Software Asset Management Essentials	<input type="checkbox"/>
C ESG	▶
Agile	▶

[Continue](#) [cancel booking](#)

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Step 2/6: Book an Exam Session Screen

*Note: If an exam is unavailable in the desired exam format, it cannot be selected.*

*Another exam session will need to be created with the appropriate exam format to select the exam.*

Professional Certifications	▼
Business Analysis	▼
Practitioner Certificate in Benefits Management and Business Acceptance	<input type="checkbox"/>
Data Centre Management	▼
Intermediate Certificate in Energy and Cost Management in Data Centres	<input type="checkbox"/> <small>Not available (hover for explanation)</small>
Software Asset Management	▼
Foundation Certificate in Software Asset Management Essentials	<input type="checkbox"/> <small>Not available (hover for explanation)</small>

Example Exam Unavailable selection

### Step 3. Candidates & Papers

This screen displays the previously selected exams and asks you to refine your requirements.

*Note: Where more than one language is offered, a language selection needs to be made to move to the next stage to enter candidate numbers attending the examination sitting.*

Book an Exam Session

1: Session Information 2: Select Exams 3: Candidates & Papers 4: Invigilator 5: Submit Booking 6: Confirmation

Step 3: Candidates & Papers

ITIL® Foundation Certificate in IT Service Management [\[remove\]](#)

Languages required for this paper \*  English

No. of candidates taking this paper \* 5

How many of these are taking a resit?

Czech

French

German

Italian

LA Spanish

Is extra time required due to language?  Yes  No

Any other reasonable adjustments  Yes  No

Course tutor ATO Tutor

Course start date \* 28 April 2014

Course end date \* 30 April 2014

Total candidates for session: 5

[Continue](#) [\[cancel booking\]](#)

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Step 3/6: Book an Exam Session Screen

You need to complete this screen before you can progress to the next stage.

After you have populated all mandatory fields, click [Continue] to carry on to the next step or cancel to cancel the accreditation application.

For every exam selected, the following fields are displayed:

Field	Input
<b>Languages required for this paper</b>	<p>Where an exam paper has been translated, the language options are listed and are selected by clicking in the check boxes.</p> <p><i>Note: Where more than one language is offered, a language selection needs to be made to reveal the fields to enter candidate numbers attending the exam session.</i></p> <p><i>If the exam is only available in English, the check box is greyed out.</i></p>
<b>No. of candidates taking this paper</b>	<p>This is the total number of candidates that the exam session is expected to host (including resit candidates).</p> <p>When a figure has been entered, additional fields are displayed; these are course tutor, course start date and course end date. See below for further details.</p>
<b>How many of these are taking a resit?</b>	<p>This is the number of candidates resitting the exam that the exam session is expected to host. If all candidates are re-sitting then this will be the same as the number of candidates taking this paper.</p>
<b>Is extra time required due to language?</b>	<p>If you have candidates sitting an exam in a language that is not their mother tongue, then they may be eligible for time extension.</p> <p>When you click the radio button, you will be required to identify candidates requiring extra time after you have completed the booking.</p>
<b>Any other reasonable adjustments</b>	<p>If you have a candidate sitting an exam who requires a reasonable adjustment to be made (e.g. they require a scribe, large print paper, extra time for reasons other than language etc...)</p> <p>When you click the radio button, you will be required to identify candidates requiring reasonable adjustments after you have completed the booking.</p>

**Course tutor**

You are required to enter the course tutor details into this field. If the course tutor is not known, you will be required to update this booking with the course tutor details before the booking process can be completed and the exam pack can be produced.

**Course start date**

The date entered must be earlier than the course end date.

- Select the date from the dynamic calendar by clicking on the calendar icon to display a popup calendar.
- Then select the date by clicking on the desired date on the calendar.
- Once you have clicked on the date, the calendar will close and the date in numerical format will be displayed in the date field.

**Course end date**

The date entered must be later than the course start date.

Select the course end date using the same method as the course start date.

After you have populated all mandatory fields, click [Continue] to carry on to the next step or cancel to cancel the booking.

## Step 4. Invigilator

This screen displays your exam invigilator requirements.

You can use your own accredited invigilator, or BCS will source one on your behalf (UK Only).

You need to complete this screen before you can progress to the next stage.

### Book an Exam Session

1: Session Information → 2: Select Exams → 3: Candidates & Papers → 4: Invigilator → 5: Submit Booking → 6: Confirmation

#### Step 4: Invigilator

Are you supplying your own invigilator? \*

Invigilator

Where should papers be sent?

Exam Venue  
 Invigilator's Home Address  
 A Different Address

Papers will be sent to the exam venue address:

Davidson Building  
Davidson Building  
5 Southampton Street  
London  
WC2E 7HA  
United Kingdom

Delivery contact name \*

Delivery telephone no. \*

[\[cancel booking\]](#)

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Step 4/6: Book an Exam Session Screen

Field	Input
<b>Are you supplying your own invigilator? Y/N</b>	<p>This question is answered by selecting either Yes or No from a drop down menu.</p> <ul style="list-style-type: none"> <li>• Yes – You are going to use your own accredited invigilator</li> <li>• No – You require BCS to source an invigilator on your behalf</li> </ul>
<b>Invigilator</b>	<p>If Yes is selected from the dropdown list, this field is displayed.</p> <p>Select the name of the accredited invigilator that you are going to use.</p>
<b>Where should papers be sent?</b>	<p>Select exam paper dispatch address by clicking on the related radio button.</p> <p>The choices are:</p> <ul style="list-style-type: none"> <li>• Exam Venue</li> <li>• Invigilators Home Address</li> <li>• A Different Address</li> </ul> <p>Depending on what has been selected, the following fields may/may not be visible.</p>
<b>Exam Venue address</b>	<p>If Exam Venue was selected:</p> <p>The venue address will be displayed and you will be asked to enter the delivery contact name and a delivery telephone number.</p>
<b>Invigilator Home address</b>	<p>If Invigilator's Home Address was selected:</p> <p>The invigilator's address is displayed from the accreditation area of the system.</p>



#### **A Different address**

If A Different Address was selected:

Click on the Add a new address link to enter a different address you will be led through a process to capture the required information.

- Country - dropdown list
- Postcode/Zip - txt field. Any UK addresses found with this postcode are displayed. If the address for a venue you wish to use is not displayed, you can add it to the system. You will need to add the following information:
- Address line 1 (mandatory)
- Address line 2
- Town/City (mandatory)
- County/State
- Postcode/Zip (mandatory)

Click [Create] and you will be returned to the main screen.

You will need to enter the delivery contact name and a delivery telephone number.

After you have populated all mandatory fields, click [Continue] to carry on to the next step or cancel to cancel the booking.

## Step 5. Submit Booking

This screen displays a summary of your booking.

Click on the underlined fields in green to go back to the relevant booking screen and make any corrections.

### Book an Exam Session

1: Session Information → 2: Select Exams → 3: Candidates & Papers → 4: Invigilator → 5: Submit Booking → 6: Confirmation

#### Step 5: Submit Booking

**Booking summary**

Exam format:	<a href="#">Paper Based</a>
Date:	<a href="#">30 April 2014</a>
Start time:	<a href="#">15:00</a>
Venue:	<a href="#">BCS Davidson Building, Davison Building, 5 Southampton Street, London, WC2E 7HA</a>
Invigilator:	<a href="#">Unknown</a>
Papers being sent to:	<a href="#">Exam Venue</a>
<b>ITIL® Foundation Certificate in IT Service Management</b>	
Tutor:	<a href="#">ATO Tutor</a>
Papers:	<a href="#">5 x English</a>

**Your booking reference details**

Your booking ID	<input type="text"/>
Purchase order number	<input type="text"/>
Invoice for the attention of	<input type="text" value="Hannah Test"/>

We will not invoice you until after the exam session has been held

[Submit Booking](#) [\[cancel booking\]](#)

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Step 5/6: Book an Exam Session Screen

### *Booking summary*

The booking reference details

<b>Field</b>	<b>Definition</b>
<b>Your Booking Id</b>	The Booking Id refers to your reference that you are using for this exam session. This booking ID is unique and cannot be used for more than one booking.
<b>Purchase Order Number</b>	This is the purchase order number that will be used when raising an invoice for the exam session. A purchase order number can be used for more than one booking. This may be a mandatory field that can be set in My Organisation under the Account tab in the Payment Preferences field.
<b>Invoice for the attention of</b>	The name of whom the invoice should be sent to. This is populated in My Organisation under the Account tab in the Finance Contact field.

After you have populated all mandatory fields, click [Submit Booking] to carry on to the next step or cancel to cancel the booking.


## Step 6. Confirmation

Once the booking process has been successfully completed, you will see the confirmation screen.

**Book an Exam Session**

1: Session Information | 2: Select Exams | 3: Candidates & Papers | 4: Invigilator | 5: Submit Booking | 6: Confirmation

**Step 6: Confirmation**

 **Thank you! Your booking was successfully submitted.**

The BCS reference number of this booking is **EB006032**  
Please quote this if you need to speak to us about this booking.

[View / modify this booking](#) | [Create new booking based on this booking data](#) | [Make another booking](#) | [View all bookings](#)

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Step 6/6: Book an Exam Session Screen

From this screen you can:

- View/modify this booking (clicking this will take you to the Exam Booking screen for this exam).
- Create new booking based on this booking data (clicking this will copy the details of this booking into a new booking)
- Make another booking (clicking this link will take you to Step 1 of the Book an Exam Session process)
- View all bookings (clicking this link will take you to the Exam Bookings default tab All upcoming exams tab).

## View/modify this booking

To view or modify this booking, click on the 'View/modify this booking' link and the following screen will be displayed with the following tabs:

- Booking
- Candidates
- Messages
- Audit
- Results

*Note: If there is an outstanding action, the tab will have an alert like the one shown below. Click on the tab to carry out the required actions.*



To view/modify a booking using Exam Manager click on the green underlines qualification name of the booking.

<u>ITIL® Foundation Certificate in IT Service Management</u>	Your ID BCS12345	Exam Candidates 5 (all outstanding)	Status Open
Wednesday 30 April 2014, 15:00 Davidson Building, Davidson Building, 5 Southampton Street, London, WC2E 7HA, United Kingdom	BCS Ref EB006032	Exam Format Paper Based	
<a href="#">Create new booking based on this booking data</a>			

To create another booking based on this booking click on the 'Create new booking based on this booking data' link. This will copy all the booking details with the exception of:

- Exam date and start time
- Exam paper selection
- Number of candidates and resit candidates
- Your booking ID and purchase order number

### Exam Booking

[Back to dashboard](#)

**Exam:** ITIL® Foundation Certificate in IT Service Management  
Wednesday 30 April 2014, 15:00, London

Booking
5
Candidates
Messages
Audit
Results
✖ Cancel booking

**Your Id** Modify  
BCS12345

**Exam date and time** Modify  
Wednesday 30 April 2014, 15:00

**Course date** Modify  
Monday 28 April 2014 -  
Wednesday 30 April 2014

**Exam venue** Modify  
Davidson Building, Davidson Building, 5  
Southampton Street, London, WC2E 7HA,  
United Kingdom  
  
Venue contact: Hannah, 01793 417666  
  
Instructions: No parking on site. Nearest car  
park is Drury Lane. Closest Underground station  
is Covent Garden.

**Paper languages** Modify  
English (5 Candidates)

**Invigilator** Modify  
ATO Invigilator

**Purchase order number** Modify  
PO81466

**Tracking details**  
N/A at this stage

**BCS Id**  
EB006032

**Exam type**  
Paper Based

**Course type** Modify  
Public

**Extra time / adjustments** Modify  
Extra time required: No  
Reasonable adjustments: No

**Course tutor** Modify  
ATO Tutor

**Delivery address for papers** Modify  
Davidson Building, Davidson Building, 5  
Southampton Street, London, WC2E 7HA,  
United Kingdom

**Invoice contact** Modify  
Finance Manager

**Dispatch notes**  
N/A at this stage

Open  
Booking is open and can be modified

**Booking Status Summary**

Booking received	Yes
Invigilator assigned	Yes
Tutor assigned by ATO	Yes
Booking locked by BCS	No
Exam pack sent by BCS	No
Exam pack received by BCS	No
Candidate registration confirmed	No
Invoice raised	No
Candidates assigned	No

[Add another exam to this session](#)

[Create new booking based on this booking data](#)

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View/modify Exam Booking Screen

## Booking Status Summary

The Booking Status Summary located on the right side of the screen provides an overview of the exam status, and where in the booking process it is, highlighting any outstanding actions.

Hover your mouse over the Yes to see the date of that status.

Booking Exam Status:

Open – open and can be modified

Locked – locked by BCS and cannot be modified

Pack Produced – exam pack has been produced by BCS

Pack Sent – exam pack has been sent by BCS

Candidates Confirmed – candidates have been confirmed and results are available

*Note: This is a static summary that has no interactivity.*

**Open**  
Booking is open and can be modified

Booking Status Summary	
Booking received	Yes
Invigilator assigned	Yes
Tutor assigned by ATO	Yes
Booking locked by BCS	No
Exam pack sent by BCS	No
Exam pack received by BCS	No
Candidate registration confirmed	No
Invoice raised	No
Candidates assigned	No

*Exam Status Summary*

## Booking Tab

When you click on the Booking tab, you see a see screen summarising the exam session that has been booked.

You can modify the following details by clicking 'Modify' and then editing the test in the following fields:

Field	Input
<b>Your ID</b>	Your reference identification number.
<b>Exam date and time</b>	The date and time you have requested for the exam.
<b>Course date</b>	The course dates for which the exam is being booked.
<b>Course Type</b>	The type of course Public or Client.
<b>Exam Venue</b>	The location of the exam.
<b>Extra time/adjustments</b>	If adjustments have been requested.
<b>Paper languages</b>	The language(s) requested and number of candidates for each.
<b>Course tutor</b>	Who the course tutor is.
<b>Invigilator</b>	The name of the exam invigilator.
<b>Delivery address for papers</b>	Where the exam papers will be posted.
<b>Purchase order number</b>	The purchase order that will be used when raising the invoice.
<b>Invoice contact</b>	The name of whom the invoice will be sent to.

'Add another exam to this session' – click this link to add another exam to this booking.

'Create new booking based on this booking data' – click this link to create a copy of this booking into a new booking.

## Candidates Tab

When you click on the Candidates tab, you see a screen summarising the candidates and/or exam slots for the booked exam session.

Exam Booking

[Back to exam bookings list](#)

**Exam: ITIL® Foundation Certificate in IT Service Management**  
Wednesday 30 April 2014, 15:00, London

Booking Candidates Messages Audit Results Cancel booking

English Paper Candidates (5)

Name	Your ID	Email	Resit	Extra Time	R Adjustments
<a href="#">Register candidate for this slot</a>					<span>✗</span>
<a href="#">Register candidate for this slot</a>					<span>✗</span>
<a href="#">Register candidate for this slot</a>					<span>✗</span>
<a href="#">Register candidate for this slot</a>					<span>✗</span>
<a href="#">Register candidate for this slot</a>					<span>✗</span>

[Add another candidate slot](#)

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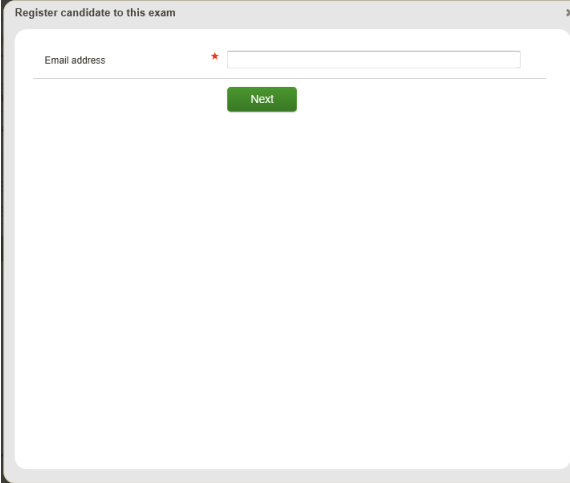
Candidates Screen



## Add Candidates to a Booking

To register candidates for this exam slot, complete the following steps;

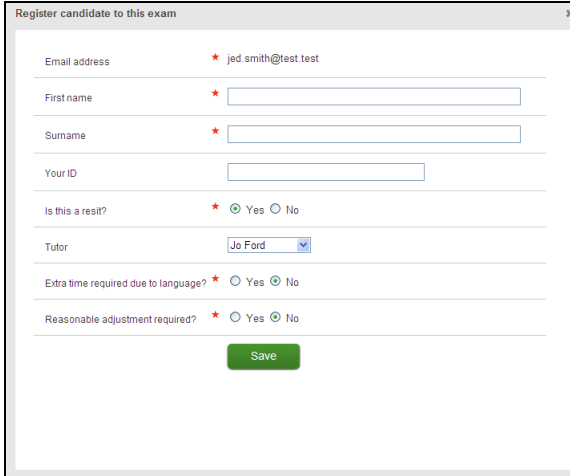
Click on the 'Register candidate for this slot' link and enter the candidates email address.



*Register Candidate – Step 1*

Enter the candidate first name and surname

Is this a resit – please enter the name of the original course tutor



*Register Candidate – Step 2*

### Add Extra Time/Reasonable Adjustments

Extra Time required due to language? If Yes is selected then enter the reason into Why is extra time required?

Extra time required due to language? ★  Yes  No

---

Why is extra time required ★

Reasonable Adjustment required? If Yes is selected check the box for the adjustment reason. A further box is displayed for additional text.

Reasonable adjustment required? ★  Yes  No

---

Adjustment reason ★  Cognitive Impairment e.g. Dyslexia

Visual Impairment

Motor Difficulties e.g. hand eye co-ordination

Physical Impairment e.g. cerebral palsy, multiple sclerosis

Hearing Impairment

Religious Grounds

Other

Check the box for the adjustment(s) requested. A further box is displayed for additional text.

Adjustment	
	<input checked="" type="checkbox"/> Reader
	<input type="checkbox"/> BSL/English Interpreter
	<input type="checkbox"/> Large Print
	<input type="checkbox"/> Audio
	<input type="checkbox"/> Rest Period/Break
	<input type="checkbox"/> Scribe
	<input type="checkbox"/> Lip Speaker
	<input type="checkbox"/> Braille
	<input type="checkbox"/> Coloured Paper
	<input type="checkbox"/> Hardware
	<input type="checkbox"/> Software
	<input type="checkbox"/> Reasonable Adjustments additional time
	<input type="checkbox"/> Any Other

Click [Save]

*Note: When the candidate details are saved, an email is sent to the candidate inviting them to register with BCS through the Candidate Portal.*

To add another candidate slot, click on the 'Add another candidate slot' link and another slot is automatically created. You can then register a candidate for that slot, using the previous process.

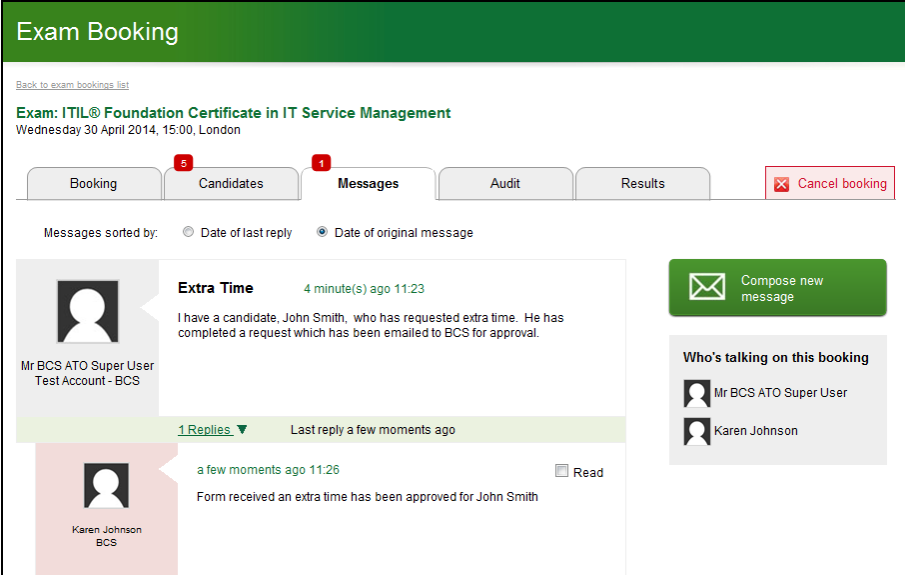
## Messages Tab

When you click on the Messages tab, you see any messages relating to the booked exam session.

The messages are displayed as a thread, and can be sorted by 'Date of last reply' or 'Date of original message'.

*Note: Messages cannot be deleted after they have been posted.*

To confirm the message has been read, click on the Read checkbox to the right hand side of the message date.



The screenshot shows the 'Exam Booking' interface. At the top, there's a green header with the text 'Exam Booking'. Below it, a link 'Back to exam bookings list' is visible. The main content area displays details for an exam: 'Exam: ITIL® Foundation Certificate in IT Service Management' and 'Wednesday 30 April 2014, 15:00, London'. A navigation bar contains tabs for 'Booking', 'Candidates', 'Messages', 'Audit', and 'Results', with a 'Cancel booking' button on the right. The 'Messages' tab is active, showing a list of messages. The first message is from 'Mr BCS ATO Super User Test Account - BCS' with the subject 'Extra Time' and a timestamp of '4 minute(s) ago 11:23'. The message text reads: 'I have a candidate, John Smith, who has requested extra time. He has completed a request which has been emailed to BCS for approval.' Below this message, there is a '1 Replies' section with a dropdown arrow and the text 'Last reply a few moments ago'. The second message is from 'Karen Johnson BCS' with a timestamp of 'a few moments ago 11:26' and a 'Read' checkbox. On the right side of the screen, there is a 'Compose new message' button and a 'Who's talking on this booking' section listing 'Mr BCS ATO Super User' and 'Karen Johnson'.

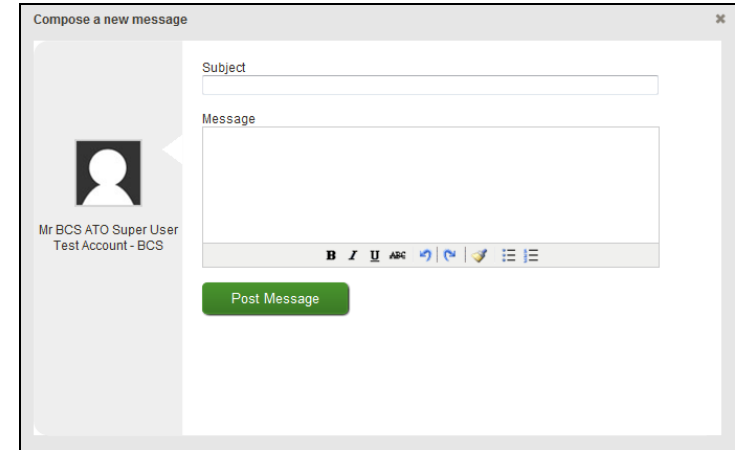
Messages Screen

*Composing new or responding to messages*

**Field**                      **Definition**

**[Compose new message]**

Click on this to compose a new message. You need to give the message a subject in the subject field and then add content to the message field. Click [Post Message] to submit the message.



**'Click to reply'**

When the message has been posted, others can reply to it by clicking on the 'Click to reply' link, and then enter their reply in the text field that is displayed. Click [Post reply] to submit it to the thread.



## Audit Tab

The Audit tab displays a historical record of any changes made to the exam booking at field level.

*Note: It does not record messaging or candidate additions, but it does capture candidate registration deletion. It does not show date of status change.*

It records:

- Who made the change
- When the change was made
- What the change was
- The exam session it relates to

The results can be sorted to show either the oldest or newest change first.

The screenshot shows the 'Exam Booking' interface. At the top, there is a green header with the text 'Exam Booking'. Below the header, there is a navigation bar with tabs for 'Booking', 'Candidates', 'Messages', 'Audit', and 'Results'. The 'Audit' tab is currently selected. To the right of the 'Audit' tab is a red button labeled 'Cancel booking'. Below the navigation bar, there is a section for 'Audit trail sorted by:' with two radio buttons: 'Oldest first' and 'Newest first'. The 'Newest first' option is selected. Below this, there is a list of audit entries. The first entry shows a user profile icon for 'Mr BCS ATO Super User Test Account - BCS' and a timestamp of '17/04/14 13:35'. The entry text reads: 'Exam date/time changed from "30/04/2014 15:00" to "30/04/2014 13:00"'. To the right of the audit trail, there is a 'Booking Status Summary' box with three rows: 'Booking received' with a green 'Yes' button, 'Invigilator assigned' with a green 'Yes' button, and 'Tutor assigned by ATO' with a green 'Yes' button.

Audit Screen

## Results Tab


The Results tab displays all the exam results.

If the exam has not taken place yet 'Exam has not taken place yet.' Is displayed

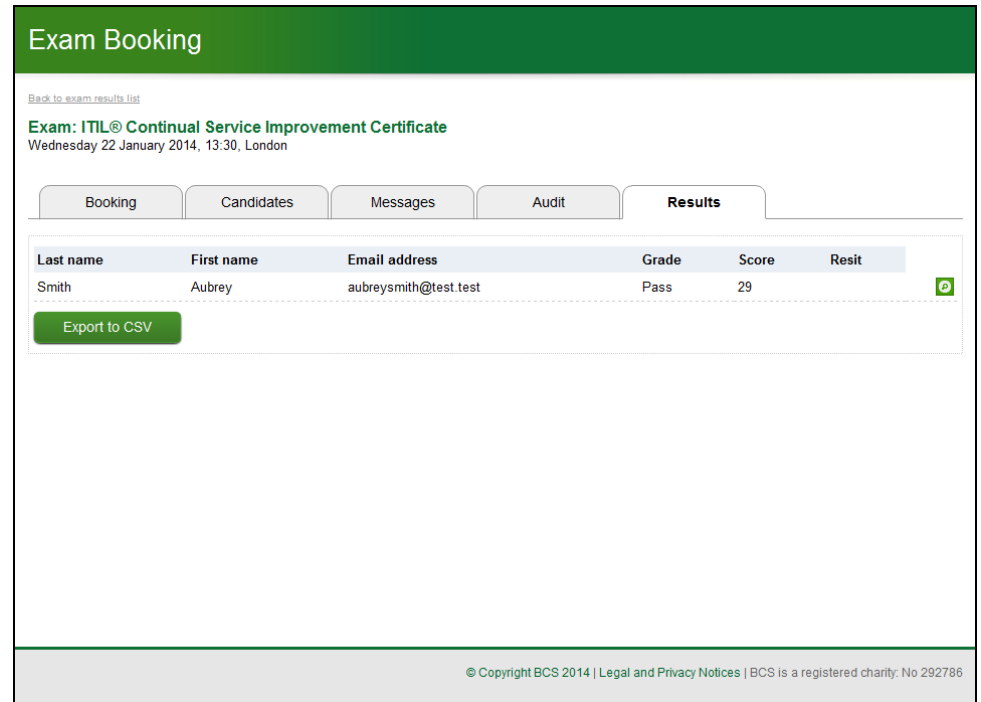
Grade – Pass, Fail or Distinction

Pending – the candidate has not yet registered on e-professional


Held – for evidence of ID, pre-requisite, extra time or reasonable adjustment approval

Click  to View result breakdown by section available only for written exams.

Click on [Export to CSV] to export these results into a spread sheet format.



The screenshot shows the 'Exam Booking' interface. At the top, there is a green header with the text 'Exam Booking'. Below the header, there is a link 'Back to exam results list'. The main content area displays the exam details: 'Exam: ITIL® Continual Service Improvement Certificate' and the date/time 'Wednesday 22 January 2014, 13:30, London'. There are five tabs: 'Booking', 'Candidates', 'Messages', 'Audit', and 'Results', with 'Results' being the active tab. Below the tabs is a table with the following data:

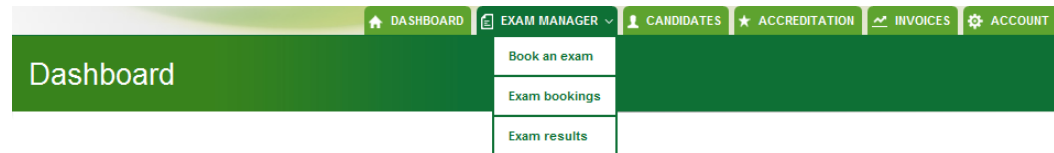
Last name	First name	Email address	Grade	Score	Resit
Smith	Aubrey	aubreysmith@test.test	Pass	29	

Below the table is a green button labeled 'Export to CSV'. At the bottom of the page, there is a footer with the text: '© Copyright BCS 2014 | Legal and Privacy Notices | BCS is a registered charity: No 292786'.

Results Screen

## How to Manage Exam Bookings

To manage your exam booking, move your mouse over the Exam Manager tab and click on 'Exam Bookings' from the dropdown menu. The 'Exam Bookings' screen is displayed.



The Exam Manager Tab

There are five tabs to provide the functionality required to manage the following:

- All upcoming
- Need candidates
- Need tutor
- Need invigilator
- Cancelled

The list will show the first 5 bookings in order of the BCS Reference number. To view the full list click on [Show all](#)

To view/modify a booking click on the green underlines qualification name of the booking.

To create another booking based on this booking click on the 'Create new booking based on this booking data' link.

A screenshot of the 'Exam Bookings' screen. The page has a green header with the title 'Exam Bookings'. Below the header, there are five tabs: 'All upcoming', 'Need candidates', 'Need tutor', 'Need invigilator', and 'Cancelled'. The 'All upcoming' tab is selected. There are filters for 'Start date', 'End date', 'Qualification', and 'Venue'. A search bar is also present. Below the filters, there is a table of exams. The table has columns for 'Qualification', 'Your ID', 'Exam Candidates', and 'Status'. The first five rows of the table are visible, each with a 'Create new booking based on this booking data' link.

Qualification	Your ID	Exam Candidates	Status
<a href="#">ISTQB-BCS Certified Tester Foundation Level</a>	635201244674605308	5 (1 outstanding)	Open
<a href="#">ISTQB-BCS Certified Tester Foundation Level</a>	635201247961080923	4 (3 outstanding)	Open
<a href="#">ISTQB-BCS Certified Tester Foundation Level</a>	635201291758650200	4 (3 outstanding)	Open
<a href="#">ITIL® Foundation Certificate in IT Service Management</a>	[Not specified]	1 (all registered)	Open
<a href="#">ISTQB-BCS Certified Tester Foundation Level</a>	635312458424168494	4 (3 outstanding)	Candidates confirmed

The Exam Bookings Screen – All Upcoming



## All upcoming exams tab

Exam Manager defaults to the All Upcoming tab.

### Filtering

The following filters can be applied to the listings.

#### Filters

User filters to search for exam bookings

<b>Start date</b>	Filter by start date
<b>End date</b>	Filter by end date
<b>Qualification</b>	Filter by examination/qualification
<b>Venue</b>	Filter by venue
<b>Search ID</b>	Filter by BCS Id, Your Id or Purchase order number

#### Additional Filters

Click on Show additional filter options to view more filter options

<b>Tutor</b>	Filter by tutor
<b>Status</b>	Filter by status (open/closed)

### To search

Apply the necessary filters and click on the 'Apply filter' to return filtered results

or

Enter the Search ID and click on the 'Search' button.

### New search

Click the 'Reset Filter' or 'Reset Search' to clear the search parameters.

## Need candidates tab

This tab will display a number when an examination has a mandatory requirement for candidates to be registered before the examination takes place. The number shows the number of exam sittings not candidates.

1. Click on the Need candidate tab and the following screen is displayed, summarising all exam sessions that have been booked that have candidate slots.
2. Click on the qualification and you will be taken to the 'Exam Booking' screen.
3. Click on the Candidates tab and follow the on screen prompts to add a candidate. (See Candidates on page 32 for more details)

*Note: This will not show for empty candidate slots for examinations where pre-registration is not mandatory.*

The screenshot shows the 'Exam Bookings' interface with the 'Need candidates' tab selected. The interface includes a navigation bar with tabs: 'All upcoming' (3), 'Need candidates' (1), 'Need tutor', 'Need invigilator', and 'Cancelled'. Below the navigation bar, it says 'Displaying all matching exams'. The main content area displays details for an exam: 'ITIL® Foundation Certificate in IT Service Management'. The exam details include: 'Your ID: 554123', 'Exam Candidates: 5 (all outstanding)', 'Status: Open', 'Date: Wednesday 14 August 2013, 13:00', 'Location: North Star House, North Star Avenue, Swindon, Wiltshire, SN2 1FA, United Kingdom', 'BCS Ref: EB002142', and 'Exam Format: Paper Based'. At the bottom of the page, there is a copyright notice: '© Copyright BCS 2013 | Legal and Privacy Notices | BCS is a registered charity. No 292786'.

*The Exam Booking Need Candidates Screen*

## Need tutor tab

This tab will display a number when an examination requires a tutor to be added to the booking.

1. Click on the Need tutor tab and the following screen is displayed, summarising all exam sessions that have been booked that require tutor details.
2. Click on the qualification and you will be taken to the 'Exam Booking' screen.
3. Under the heading Course tutor, click on the Modify tab and follow the on screen prompts to add tutor details. (See View/modify this booking on page 29 for more details)

The screenshot shows the 'Exam Bookings' interface. At the top, there's a green header with the title 'Exam Bookings'. Below it, a navigation bar contains five tabs: 'All upcoming', 'Need candidates', 'Need tutor' (which is highlighted with a green box and a '3' indicator), 'Need invigilator', and 'Cancelled'. A message says 'Select an exam to view / amend or to see options for cancellation.' Below the tabs, it says 'Displaying all matching exams'. There are three exam entries, each with a link to 'Create new booking based on this booking data'. Each entry includes the exam name, date, time, location, Your ID, Exam Candidates (with a count of outstanding candidates in red), and Status (Open). The first entry is for Thursday 17 April 2014, 15:30, with 5 candidates (1 outstanding). The second is for Thursday 10 April 2014, 15:30, with 4 candidates (3 outstanding). The third is also for Thursday 10 April 2014, 15:30, with 4 candidates (3 outstanding). At the bottom right, there is a copyright notice: '© Copyright BCS 2014 | Legal and Privacy Notices | BCS is a registered charity; No 292786'.

Exam Name	Date & Time	Location	Your ID	Exam Candidates	Status
ISTQB-BCS Certified Tester Foundation Level	Thursday 17 April 2014, 15:30	Fleming Way, Swindon, Wiltshire, SN1 2NG, United Kingdom	635201244674606308	5 (1 outstanding)	Open
ISTQB-BCS Certified Tester Foundation Level	Thursday 10 April 2014, 15:30	Fleming Way, Swindon, Wiltshire, SN1 2NG, United Kingdom	635201247981086923	4 (3 outstanding)	Open
ISTQB-BCS Certified Tester Foundation Level	Thursday 10 April 2014, 15:30	Fleming Way, Swindon, Wiltshire, SN1 2NG, United Kingdom	635201291756650200	4 (3 outstanding)	Open

The Exam Booking Need Tutor Screen

## Need invigilator tab

This tab will display a number when an examination requires an invigilator to be added to the booking.

1. Click on the Need invigilator tab and the following screen is displayed, summarising all exam sessions that have been booked that require invigilator details.
2. Click on the qualification and you will be taken to the 'Exam Booking' screen.
3. Under the heading Course invigilator, click on the Modify tab and follow the on screen prompts to add invigilator details. (See View/modify this booking on page 29 for more details)

Exam Bookings

Select an exam to view / amend or to see options for cancellation.

10 All upcoming    Need candidates    3 Need tutor    1 Need invigilator    Cancelled

Displaying all matching exams

[ITIL® Foundation Certificate in IT Service Management](#)    Your ID: BCS12345    Exam Candidates: 5 (all outstanding)    Status: Open

Wednesday 30 April 2014, 15:00  
Davidson Building, Davidson Building, 5 Southampton Street, London, WC2E 7HA, United Kingdom

BCS Ref: EB006032    Exam Format: Paper Based

[Create new booking based on this booking data](#)

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The Exam Booking Need Invigilator Screen

## Cancelled tab

Click on the Cancelled tab and the following screen is displayed, summarising all exam bookings that have been cancelled. The list does not contain cancelled exams in with a sitting date the past.

Select an exam to view / amend or to see options for cancellation.

4 All upcoming 2 Need candidates 1 Need tutor Need invigilator **Cancelled**

Displaying all matching exams

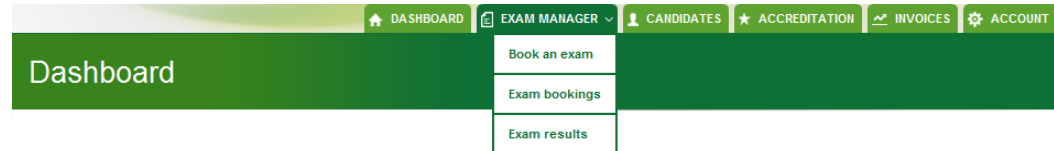
<b><u>Certificate in Software Asset Management Essentials</u></b>	Your ID 456890	Exam Candidates 5 (all outstanding)	Status Cancelled
Friday 23 August 2013, 15:00 North Star House, North Star House, North Star Avenue, Swindon, Wiltshire, SN2 1FA, United Kingdom	BCS Ref EB002146	Exam Format Paper Based	

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The Exam Booking - Cancelled Screen

## How to View Exam Results

To manage your exam booking, move your mouse over the Exam Manager tab and click on 'Exam Results' from the dropdown menu. The 'Exam Results' screen is displayed.



The Exam Manager Tab

To help you find the exam results you are looking for, you can filter by:

- Date range
- Examination
- Tutor
- ID

### To search

Apply the necessary filters and click on the 'Apply filter' to return filtered results

or

Enter the Search ID and click on the 'Search' button.

### New search

Click the 'Reset filter' or 'Reset search' to clear the search parameters.

To view the results tab in a booking click on the green underlines qualification name of the booking.

To create another booking based on this booking click on the 'Create new booking based on this booking data' link.

A screenshot of the 'Exam Results' screen. It features a green header with the title 'Exam Results'. Below the header is a search and filter section. On the left, there are 'Filters' for 'Start date', 'End date', 'Qualification', and 'Tutor', each with a dropdown menu and a 'Show all' button. There are 'Apply filter' and 'Reset filter' buttons. On the right, there is a 'Search ID' field with a 'Search' button and a 'Reset search' button. Below this is a table of exam results. Each row represents an exam booking with columns for qualification name, date, location, Your ID, BCS Ref, Exam Candidates, Exam Format, and Status. The status column indicates the number of candidates and their status (e.g., 'confirmed', 'all outstanding').

Qualification	Date	Location	Your ID	BCS Ref	Exam Candidates	Exam Format	Status
<a href="#">Intermediate Certificate in Software Testing</a>	Friday 31 May 2013, 15:30	Fleming Way, Swindon, Wiltshire, SN1 2NG, United Kingdom	[Not specified]	OLEB001005	1 (all registered)	Paper Based	Candidates confirmed
<a href="#">ISTQB-BCS Certified Tester Foundation Level</a>	Friday 31 May 2013, 15:30	Fleming Way, Swindon, Wiltshire, SN1 2NG, United Kingdom	[Not specified]	OLEB001005	1 (all outstanding)	Paper Based	Candidates confirmed
<a href="#">ISTQB-BCS Certified Tester Foundation Level</a>	Friday 31 May 2013, 09:00	The Barn, The Barn, Lydiard Tregoze, Swindon, Wiltshire, SN5 3PA, United Kingdom	SAS 31/05/13	OLEB001030	2 (all outstanding)	Paper Based	Candidates confirmed
<a href="#">Foundation Certificate in Business Analysis</a>	Friday 31 May 2013, 09:00	The Barn, The Barn, Lydiard Tregoze, Swindon, Wiltshire, SN5 3PA, United Kingdom	SAS 31/05/13	OLEB001030	2 (all outstanding)	Paper Based	Candidates confirmed

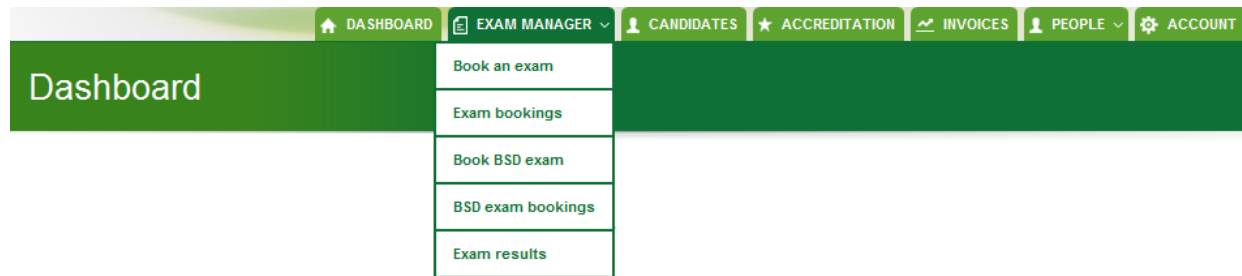
The Exam Results Screen

## BA or SD Written Exams

### How to book a BA or SD Written exam


To book a BA or SD written exam, move your mouse over the Exam manager tab and click on 'Book BSD exam' from the dropdown menu. The 'Book BSD Exam Session' screen is displayed.

*Note: The BSD options in the menu will appear only for ATOs accredited to deliver BA or SD written exams.*



*The Exam Manager Tab*

This screen captures the qualification, date and PO number (if applicable) of the BA or SD exam session.

Field	Input
<b>Qualification</b>	Select the qualification from a dropdown list. The list displays the BA or SD exams that you are accredited deliver.
<b>Exam Date</b>	Select the date from the dynamic calendar by clicking on the calendar icon to display a popup calendar. 
<b>PO number</b>	This is the purchase order number that will be used when raising an invoice for the exam session. This may be a mandatory field that can be set in My Organisation under the Account tab.

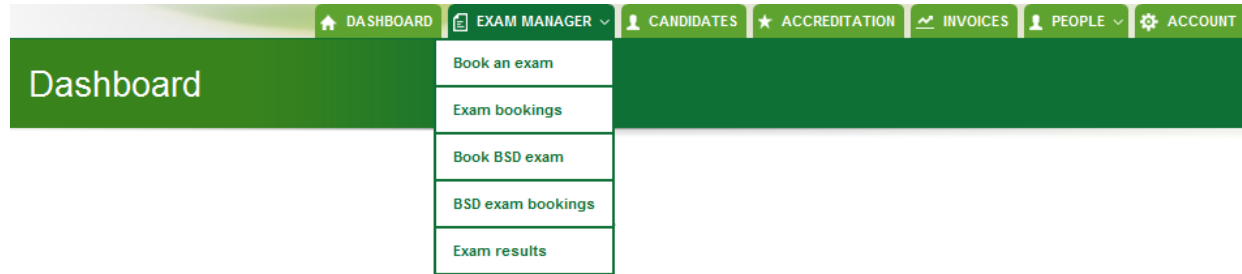
**Click on [Submit Booking] to save the booking.**

A screenshot of the 'Book BSD Exam Session' form. The form has a green header with the title. Below the header is a section titled 'BSD Exam Session Information'. It contains three input fields: 'Qualification' (a dropdown menu with 'Please select...' and a red asterisk), 'Exam date' (a text input field with a calendar icon and a red asterisk), and 'PO number' (a text input field). At the bottom of the form is a green 'Submit Booking' button.

*Book BSD Exam Screen*

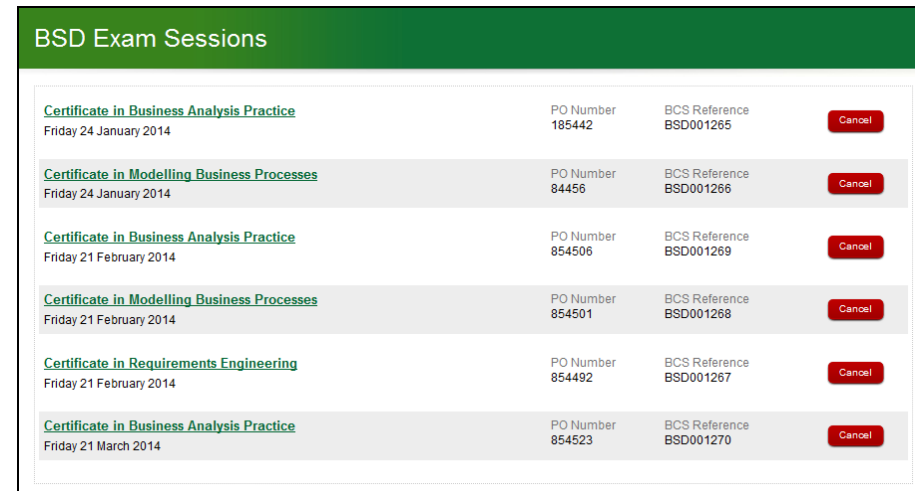
## How to manage a BA or SD Written Exam

To manage a BA or SD written exam booking, move the mouse over the Exam Manager tab and click on 'BSD exam bookings' from the dropdown menu. The 'BSD Exam Bookings' screen is displayed



*The Exam Manager Tab*

The BA or SD written bookings are listed in date order. Once a BA or SD written booking has had the results uploaded to it by BCS, it will longer appear in the list.

A screenshot of the 'BSD Exam Sessions' screen. It displays a table with six rows of exam sessions. Each row includes the exam name, date, PO Number, BCS Reference, and a 'Cancel' button.

Exam Name	Date	PO Number	BCS Reference	Action
<a href="#">Certificate in Business Analysis Practice</a>	Friday 24 January 2014	185442	BSD001265	Cancel
<a href="#">Certificate in Modelling Business Processes</a>	Friday 24 January 2014	84456	BSD001266	Cancel
<a href="#">Certificate in Business Analysis Practice</a>	Friday 21 February 2014	854506	BSD001269	Cancel
<a href="#">Certificate in Modelling Business Processes</a>	Friday 21 February 2014	854501	BSD001268	Cancel
<a href="#">Certificate in Requirements Engineering</a>	Friday 21 February 2014	854492	BSD001267	Cancel
<a href="#">Certificate in Business Analysis Practice</a>	Friday 21 March 2014	854523	BSD001270	Cancel

*The BSD Exam Bookings Screen*



## To modify a BA or SD Written Exam

To modify a booking, click on the name of the qualification and the following screen will be displayed:

Click [Update] to save the changes or Cancel to cancel the booking.

### BSD Exam Session

#### Modify BSD exam session details

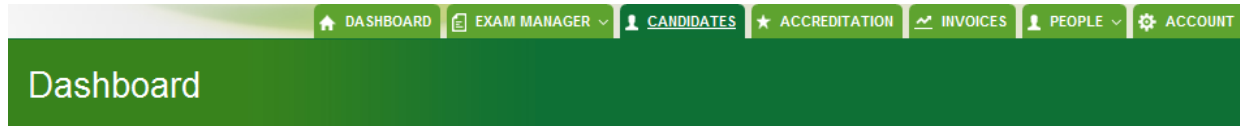
BCS reference	BSD001265
Qualification	* Certificate in Business Analysis Practice <input type="text"/>
Exam date	* 24 January 2014 <input type="text"/>
PO number	185442 <input type="text"/>

[\[Cancel\]](#)

*The Modify BSD Exam Session Screen*

## Candidates

To manage your candidates, click on the 'Candidates' tab. The 'View/Edit Candidates' screen is displayed.




*The Candidates Tab*

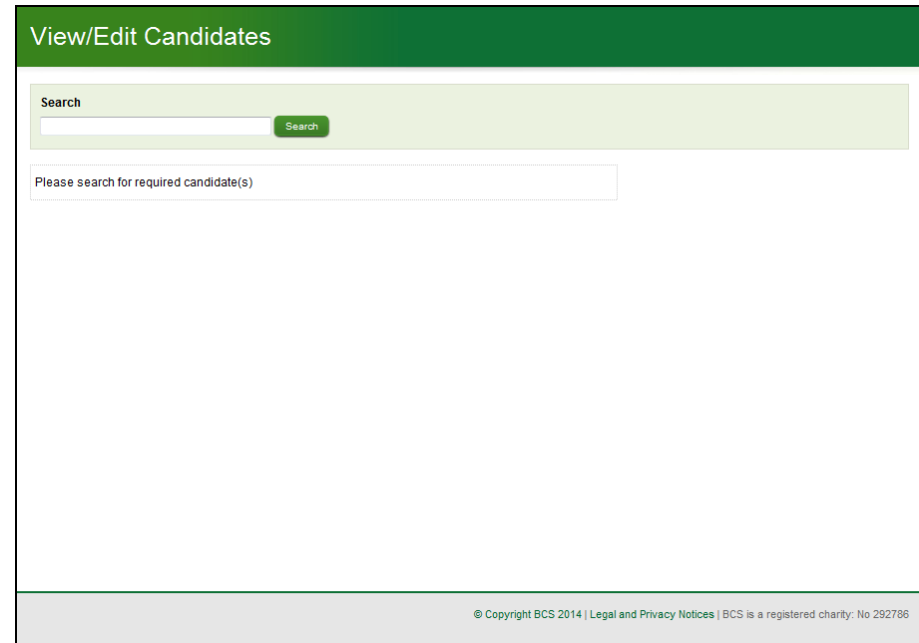
### How to view candidate details

To view candidate details, enter the candidate's name or email address into the search field and click 'search'.

The following candidate details will be displayed:

- First Name
- Last Name
- Email address

If a candidate has not yet registered, an exclamation symbol  is displayed next to the candidate's name.



*The Candidates Screen*

Click on a name in the list to see upcoming exams and exam history in e-professional.

*Note: Only examinations that have been taken through your organisation in e-professional will be displayed.*

### View/Edit Candidates

Search   *The Candidates Details Screen*

<u>First Name</u>	<u>Last Name</u> ▼	<u>Email Address</u>
John	Smith	john.smith@test.test
Niles	Smith	niles.smith@test.test
Reg	Smith	regsmith@test.test
Susan	Smith	sue.smith@test.test

**Candidate Overview**  
John Smith  
john.smith@test.test

**Upcoming exams**  
None

**Exam history**

14/08/2013	Certificate in Information Security Management Principles (CBT) [Distinction]
01/08/2013	Certificate in Commercial Awareness [Pending]
03/07/2013	Certificate in Commercial Awareness [No show]

## Accreditation

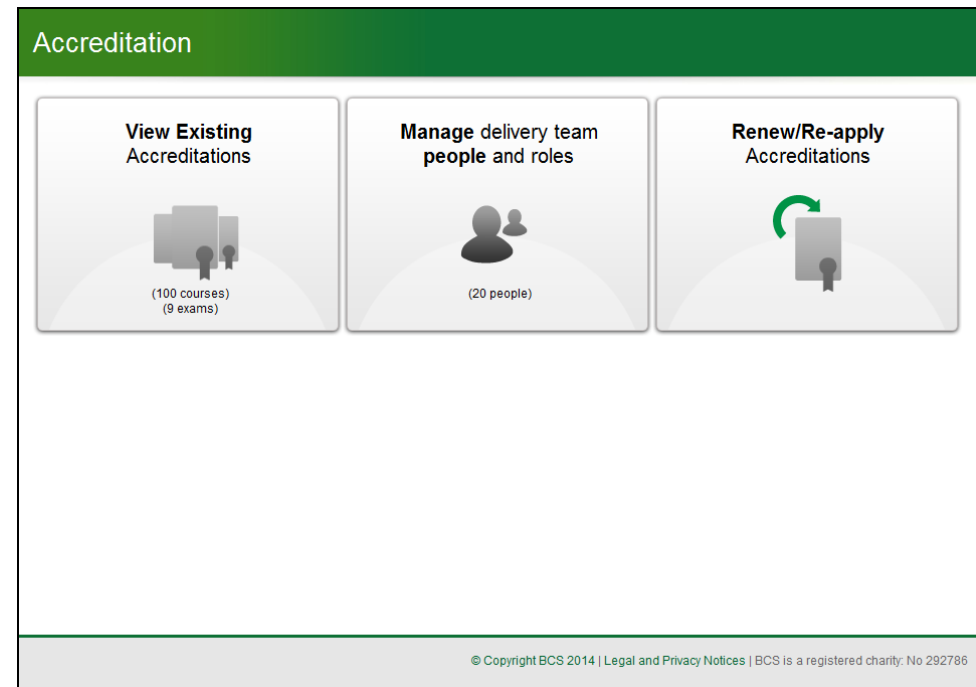
From the dashboard, click on the 'Accreditation' link on the menu bar



The Accreditation Tab

From here you can

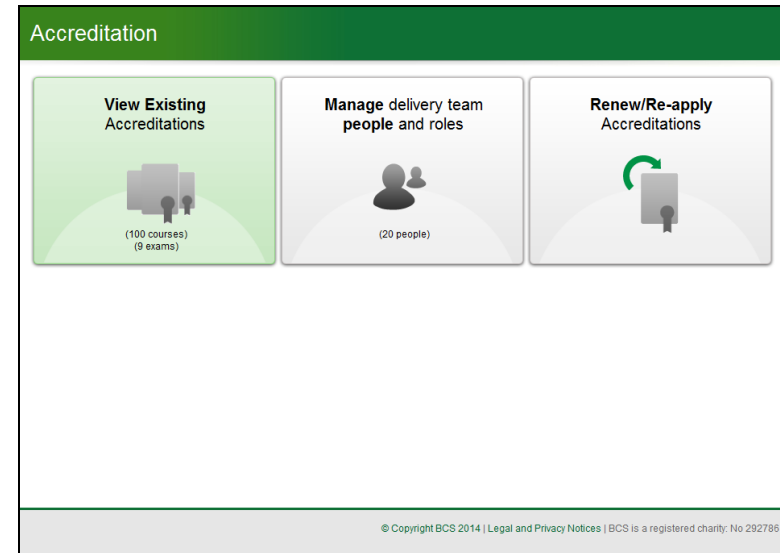
- View existing accreditations
- Manage your delivery team people and roles
- Renew/Re-apply for accreditations



The Accreditation Dashboard

## How to view existing accreditations

To view your accreditation status, click on the [View Existing Accreditations] button.



Accreditation – View Existing Accreditations Screen

The 'Current' tab displays a summary of all your current accreditations.

The 'Expired' tab displays a summary of all your expired accreditations.

The 'Rejected' tab displays a summary of all your rejected accreditation applications.

The 'Abandoned' tab displays a summary of all your abandoned accreditation applications.

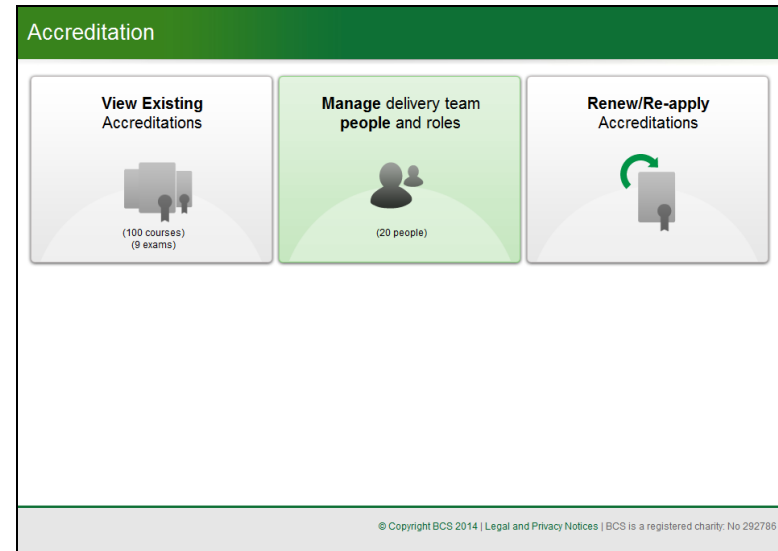
The screenshot shows a screen titled "View Accreditations" with a green header. Below the header are four tabs: Current, Expired, Rejected, and Abandoned. The "Current" tab is selected, displaying a table of accreditations.

Certification	First Accredited	Date Awarded	Expiry Date	People
Certificate in Software Asset Management Essentials	08/05/2013	08/05/2013	07/05/2016	3
ISTQB-BCS Certified Tester Foundation Level		15/04/2013	14/04/2016	12
ITIL® Foundation Certificate in IT Service Management	08/05/2013	08/05/2013	07/05/2016	4

View Accreditations Screen

## How to manage delivery teams, people and roles

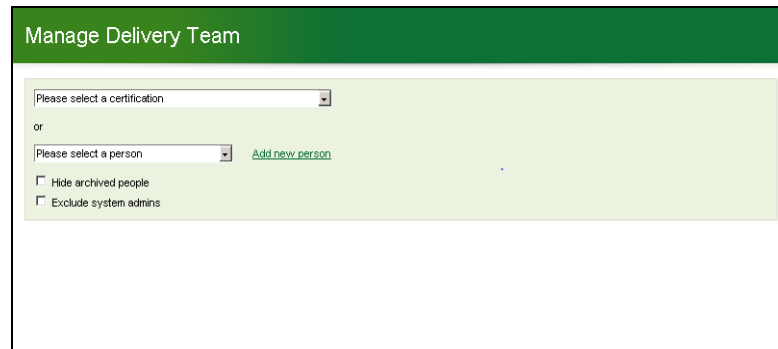
To manage your delivery team, click on the [Manage delivery teams, people and roles] button and you will be taken to the Manage delivery team screen



*Manage delivery team people and roles*

The Manage Delivery Team screen provides you with the following options:

- To manage people by certification, select a certification from a dropdown list
- To manage a person, select a person from a dropdown list
- To hide archived people from the results view, click the associated checkbox
- To exclude system admins from the results view, click the associated checkbox
- To add a new course director, tutor, administrator or invigilator, click on the 'Add new person' link.



*Manage Delivery Team*

## Manage people by certification

Select the desired certification from the dropdown list.

The list of certified team members are displayed in the All people tab.

The following tabs are available if you want to see team members grouped by role:

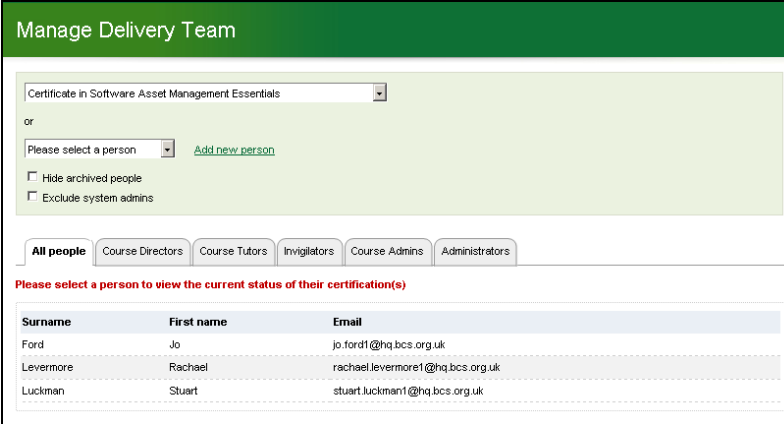
- All people
- Course Directors
- Course Tutors
- Invigilators
- Course Admins
- Administrators

Select the team member you want to modify from the displayed list.

You will be directed to their personal details screen.

## Add Invigilator

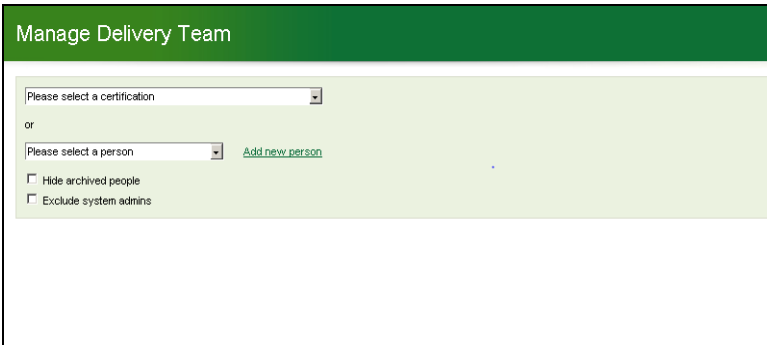
To add an invigilator click on the 'Add new person' link



The screenshot shows the 'Manage Delivery Team' interface. At the top, there is a green header with the text 'Manage Delivery Team'. Below the header, there is a light green box containing a dropdown menu with the text 'Certificate in Software Asset Management Essentials'. Below this, there is the word 'or' and another dropdown menu with the text 'Please select a person'. To the right of this dropdown is a link that says 'Add new person'. Below these elements are two checkboxes: 'Hide archived people' and 'Exclude system admins'. Below the checkboxes is a row of tabs: 'All people', 'Course Directors', 'Course Tutors', 'Invigilators', 'Course Admins', and 'Administrators'. Below the tabs is a red text prompt: 'Please select a person to view the current status of their certification(s)'. Below this prompt is a table with three columns: 'Surname', 'First name', and 'Email'. The table contains three rows of data:

Surname	First name	Email
Ford	Jo	jo.ford1@hq.bcs.org.uk
Levermore	Rachael	rachael.levermore1@hq.bcs.org.uk
Luckman	Stuart	stuart.luckman1@hq.bcs.org.uk

Manage Delivery Team – by Certification



The screenshot shows the 'Manage Delivery Team' interface. At the top, there is a green header with the text 'Manage Delivery Team'. Below the header, there is a light green box containing a dropdown menu with the text 'Please select a certification'. Below this, there is the word 'or' and another dropdown menu with the text 'Please select a person'. To the right of this dropdown is a link that says 'Add new person'. Below these elements are two checkboxes: 'Hide archived people' and 'Exclude system admins'.

Manage Delivery Team

**Field**                      **Input**

**Qualification**            Select the qualification from a dropdown list. Invigilators are approved at an organisation level not a qualification level. Select a qualification to add an invigilator.

**User to be created as**    Select Invigilator.

**Click on [Continue]**

Back to Manage Delivery Teams

## Add User Accreditation

User to be Accredited as

Qualification \* Foundation Certificate in Project Management

User to be Accredited as \* Invigilator

Continue

*The Add User Accreditation Screen*



Enter the following details for the invigilator. The name and address are used in the exam booking process in the Exam Manager.

- First name (mandatory)
- Surname (mandatory)
- Email (mandatory)
- Telephone
- Date of birth (mandatory – if not known then select any date)
- Country – dropdown list
- Address Line 1 (mandatory)
- Address line 2
- Town/City (mandatory)
- Country/State
- Post code/Zip (mandatory)

Click on [Save and Continue]

The following message will be displayed

Your application has been sent to the BCS Accreditation team for review

Send the signed copy of the completed NDA to BCS Accreditation.

## Invigilator

### Delivery teams

#### Invigilator

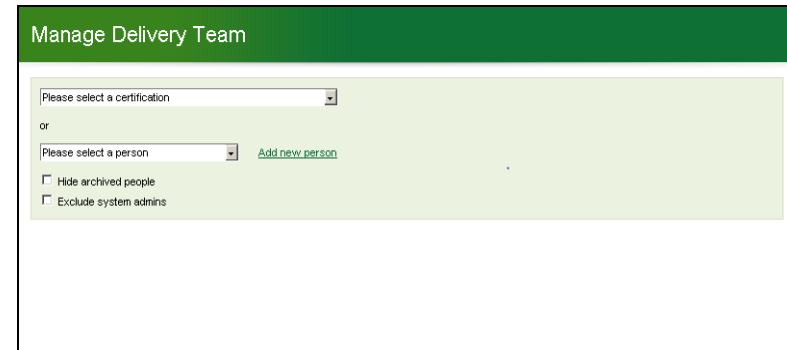
First name	*	<input type="text"/>
Surname	*	<input type="text"/>
Email	*	<input type="text"/>
Telephone		<input type="text"/>
Date of birth	*	day <input type="text"/> month <input type="text"/> year <input type="text"/>
Country	*	Select country... <input type="text"/>
Address line 1	*	<input type="text"/>
Address line 2		<input type="text"/>
Town / City	*	<input type="text"/>
County / State		<input type="text"/>
Post code / Zip		<input type="text"/>

To complete the invigilator review process, please send a signed copy of the NDA form to [pds-accreditation@hq.bcs.org.uk](mailto:pds-accreditation@hq.bcs.org.uk). If you require a copy of the NDA form please contact the BCS Accreditation Team.

The Add Invigilator Screen

## Add Tutor

To add a new tutor click on the 'Add new person' link



The screenshot shows the 'Manage Delivery Team' interface. It features a green header bar with the title 'Manage Delivery Team'. Below the header, there is a light green background area containing two dropdown menus: 'Please select a certification' and 'Please select a person'. The 'Please select a person' dropdown has a link 'Add new person' next to it. Below these dropdowns are two checkboxes: 'Hide archived people' and 'Exclude system admins'.

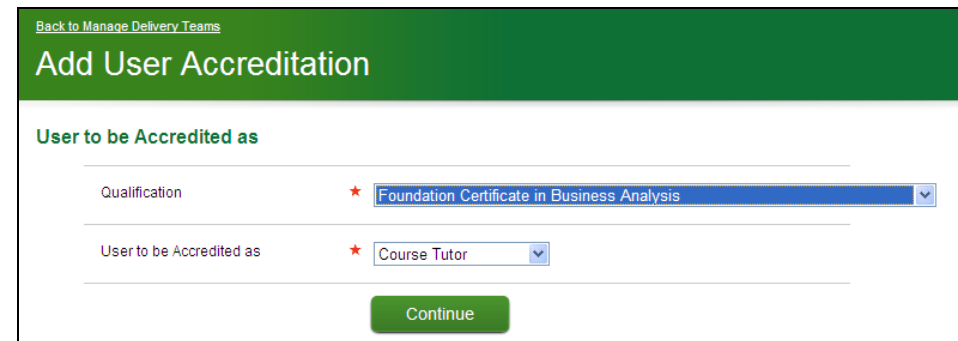
*Manage Delivery Team*

**Field**            **Input**

**Qualification**    Select the qualification from a dropdown list

**User to be created as**    Select Course Tutor.

**Click on [Continue]**



The screenshot shows the 'Add User Accreditation' interface. It has a green header bar with the title 'Add User Accreditation' and a link 'Back to Manage Delivery Teams'. Below the header, there is a section titled 'User to be Accredited as'. This section contains two dropdown menus: 'Qualification' with a red star icon and 'User to be Accredited as' with a red star icon. The 'Qualification' dropdown is currently set to 'Foundation Certificate in Business Analysis' and the 'User to be Accredited as' dropdown is set to 'Course Tutor'. Below these dropdowns is a green 'Continue' button.

*The Add User Accreditation Screen*

Enter the following details for the tutor. The name is used in the exam booking process in the Exam Manager.

- First name (mandatory)
- Surname (mandatory)
- Email (mandatory)
- Telephone
- Date of birth (mandatory – if not know then select any date)
- Already registered with
  - BCS** – if the tutor is already accredited with BCS to deliver training for a different course
  - Other EI** – if the tutor is already accredited to deliver a BCS course with another EI
  - None** – if the tutor is not accredited to deliver BCS training with any EI

**Course Tutor**

Application for: Foundation Certificate in Business Analysis

**Delivery teams**

**Course Tutor**

First name \*

Surname \*

Email \*

Telephone

Date of birth \*  day  month  year

Already registered with  BCS  Other EI  None

The Add Course Tutor Screen

Click on [Next]

### If the tutor is already registered with BCS

Enter any other relevant information.

Click on [Next].

Already registered with  BCS  Other EI  None

If you are applying for CTFL, CTAL TA, CTAL TM and CTAL TTA you will be required to upload evidence of this later.

**Any other relevant information**

Other information

[Cancel](#)

Upload evidence and/or optional evidence as requested

Click on [Upload] to browse to attach documents

**User to be Accredited as**

User name: ATO User

Role: ATO Process Course Tutor

PO number:

**List of evidence to be supplied**

Description: Curriculum Vitae for ATO User

**List of optional evidence to be supplied**

Description: Existing Tutor Evidence for ATO User

Click on [Save].

The following message will be displayed

Your application has been sent to the BCS Accreditation team for review

**User to be Accredited as**

User name: ATO User

Role: ATO Process Course Tutor

PO number:

**List of evidence uploaded / sent**

Description	Send method	File view	Modify	Received
Curriculum Vitae for ATO User	Online	<a href="#">Download</a>	<a href="#">Modify</a>	24/10/2013 16:55
Existing Tutor Evidence for ATO User	Online	<a href="#">Download</a>	<a href="#">Modify</a>	24/10/2013 16:55

**If the tutor is already registered with another EI**

Enter any other relevant information

Click on [Next]

Already registered with  BCS  Other EI  None

**Any other relevant information**

Other information

**Next**

Upload evidence as requested.

Click on [Upload] to browse to attach documents.

**User to be Accredited as**

User name

Role

PO number

**List of evidence to be supplied**

Description	
Curriculum Vitae for ATO User	<b>Upload</b>
Existing Tutor Evidence for ATO User	<b>Upload</b>

Click on [Save]

The following message will be displayed

Your application has been sent to the BCS Accreditation team for review

### User to be Accredited as

---

User name                      ATO User

---

Role                              ATO Process Course Tutor

PO number                     

---

### List of evidence uploaded / sent

---

Description	Send method	File view	Modify	Received
Curriculum Vitae for ATO User	Online	<a href="#">Download</a>	<a href="#">Modify</a>	24/10/2013 16:55
Existing Tutor Evidence for ATO User	Online	<a href="#">Download</a>	<a href="#">Modify</a>	24/10/2013 16:55

**If the tutor is not registered with BCS or another EI**

Click the Add button to enter data for each section

- Work Experience as a Course Tutor
- Work Experience in the Subject Area
- Academic/Professional Certifications
- Professional memberships
- Any other relevant information

Already registered with  BCS  Other EI  None

---

**Work Experience as Course Tutor**

Please supply details of your work experience as a Course Tutor \*

[Add](#)

---

**Work Experience in the Subject Area**

Please supply details of your work experience in the subject area being accredited \*

[Add](#)

---

**Academic / Professional Certifications**

Please supply details of any academic / professional certifications you hold. \*

[Add](#)

---

**Professional Memberships**

Please supply details of any Professional Memberships you hold.

[Add](#)

---

**Any other relevant information**

Other information

[Next](#) [Cancel](#)

### Adding Course Tutor/Subject Area Experience

Enter the details of

- Start Date (mandatory) – drop down list
- Finish Date (mandatory) – drop down list
- Organisation (mandatory)
- Summary of Duties (mandatory)

#### New Experience

Start date \*

Finish date \*    or  tick if current role

Organisation \*

Summary of duties \*

### Adding Academic/Professional Certifications

Enter the details of

- Qualification name (mandatory)
- Exam board (mandatory) – drop down list or enter into the text box below

#### New Academic / Professional Certification

Qualification name \*

Exam board \*    
If "Other", please specify:

### Adding Professional Membership

Enter the details of

- Professional body (mandatory)
- Level/Grade
- Date joined (mandatory) – drop down list

#### New Professional Membership

Professional body \*

Level / Grade

Date joined \*



### Adding other relevant information

Enter the details into

- Other information

Click [Next]

#### Any other relevant information

Other information

Upload evidence as requested.

Click on [Upload] to browse to attach documents.

#### User to be Accredited as

User name

Role

PO number

#### List of evidence to be supplied

Description
Curriculum Vitae for Kate Smith <input type="button" value="Upload"/>

Click [Save]

The following message will be displayed

Your application has been sent to the BCS Accreditation team for review

#### User to be Accredited as

User name

Role

PO number

#### List of evidence uploaded / sent

Description	Send method	File view	Modify	Received
Curriculum Vitae for Kate Smith	Online	<a href="#">Download</a>	<a href="#">Modify</a>	18/09/2013 15:19

## Manage People

You can access team member's details by either by selecting the desired team member from the dropdown list on the Manage Delivery Team default landing page or by clicking on the team members name when managing people by certification.

You will see a screen with two tabs, 'Personal details' and 'Roles'.

The 'Personal details' tab is the default landing page for this tab. It displays the individual's name, date of birth and contact details, certifications, memberships and if previously entered, associated information.

The screenshot shows the 'Manage Delivery Team' interface. At the top, there is a green header with the text 'Manage Delivery Team'. Below the header, there are two tabs: 'Person details' and 'Roles'. The 'Roles' tab is selected. Below the tabs, there is a sub-header 'View and amend roles for Jo Ford'. Underneath, there are six sub-tabs: 'Course directors', 'Course tutors', 'Invigilators', 'Course Admins', 'Internal examiners', and 'Exam directors'. The 'Invigilators' sub-tab is selected. The main content area displays a list of certifications with checkboxes:

- Data Centre Management
  - Intermediate Certificate in EU Code of Conduct in Data Centres
- IT Governance and Information Security
  - Certificate in Information Security Management Principles
- IT Service Management/ITIL®
  - ITIL® Foundation Certificate in IT Service Management (Submitted)
- Software Asset Management
  - Certificate in Software Asset Management Essentials
- Software Testing
  - ISTQB-BCS Certified Tester Foundation Level
  - Intermediate Certificate in Software Testing

*Manage Delivery Team - Roles*

Note: Greyed out fields cannot be modified from this screen.

You can modify field information or click 'Add' to add information.  
Click [Update] to apply changes.

[Back to Manage Delivery Teams](#)

## Manage Delivery Team

**Person details** Roles

First name \* ATO

Surname \* Tutor

Email \* ATOTutor@example.com

Telephone

Date of birth \* 1 January 1998

### Academic / Professional Certifications

Please supply details of any academic / professional certifications you hold. \*

Add

### Professional Memberships

Please supply details of any Professional Memberships you hold.

Add

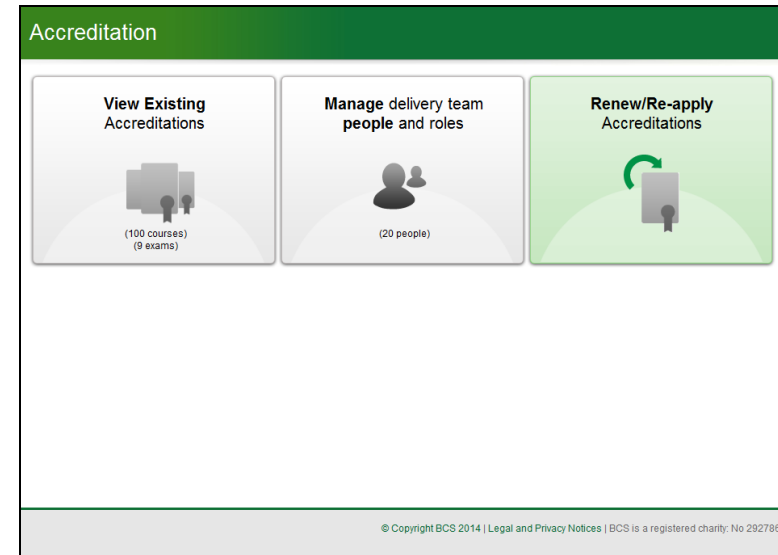
Update

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Manage Delivery Team – Person Details

## How to renew/re-apply for accreditations

To renew an accreditation, click on the [Renew/Re-apply Accreditations] button and you will be taken to the Renew Accreditation screen



The list shows accreditations due for renewal in the next 3 months in order of expiry date

Those highlighted in red have expired within the last month and have not been renewed.

Certification	First accredited	Awarded date	Expiry date	Status
Specialist Certificate in Change Management	01/01/2001	01/10/2010	24/07/2013	
Certificate in Programme and Project Support Office Essentials		01/08/2010	31/07/2013	
Intermediate Certificate in Enterprise and Solution Architecture		15/09/2010	14/09/2013	

*Renew Accreditations List*

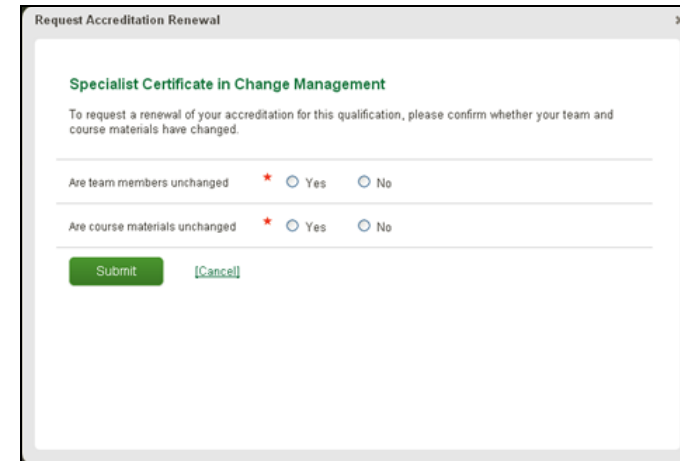
Hover over a line and it will highlight the certification. Click to renew. The Request Accreditation Renewal box will open.

Certification	First accredited	Awarded date	Expiry date	Status
Specialist Certificate in Change Management	01/01/2001	01/10/2010	24/07/2013	
Certificate in Programme and Project Support Office Essentials		01/08/2010	31/07/2013	
Intermediate Certificate in Enterprise and Solution Architecture		15/09/2010	14/09/2013	

Confirm that people and materials have remained unchanged (as this is the norm generally)

*Note: If new people are to be added or roles changed then this needs to be done in the Manage People Section first.*

If No is selected for either section then a message will be displayed advising you to contact BCS Accreditation to process the renewal changes.



**Request Accreditation Renewal**

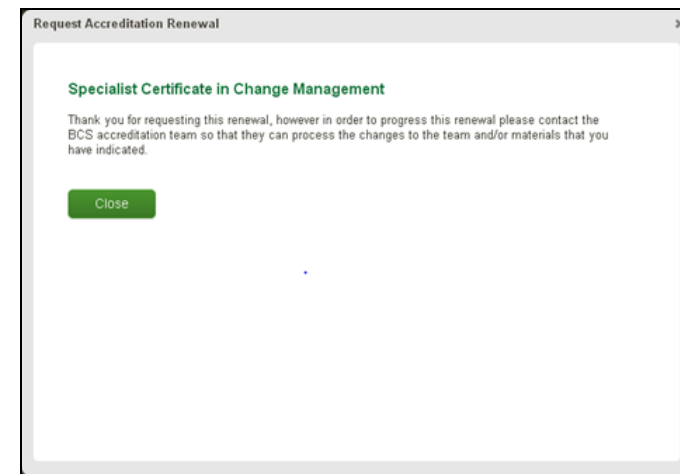
**Specialist Certificate in Change Management**

To request a renewal of your accreditation for this qualification, please confirm whether your team and course materials have changed.

Are team members unchanged \*  Yes  No

Are course materials unchanged \*  Yes  No

[\[Cancel\]](#)

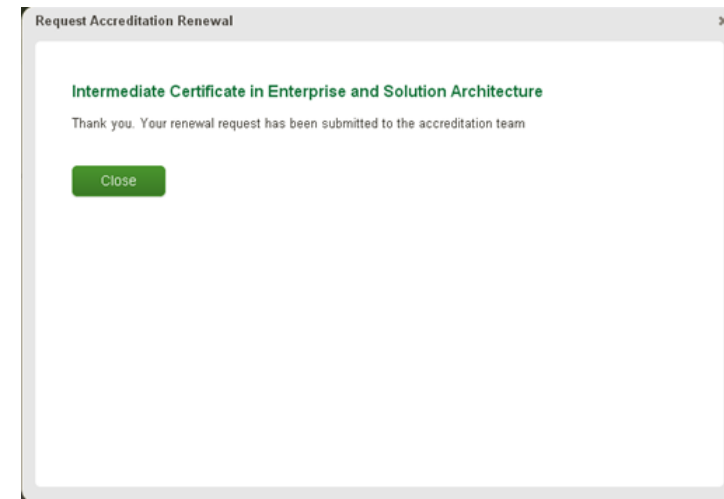


**Request Accreditation Renewal**

**Specialist Certificate in Change Management**

Thank you for requesting this renewal, however in order to progress this renewal please contact the BCS accreditation team so that they can process the changes to the team and/or materials that you have indicated.

If Yes is selected for both sections the renewal is submitted and a confirmation screen will be displayed.



The qualification will be greyed in the Renew Accreditations list and show status With BCS. Once approved by BCS the qualification will no longer appear in the renewal list. You will be sent the renewed Accreditation certificate by BCS Accreditations.

The image shows a table titled "Renew accreditations" with a green header. The table has five columns: Certification, First accredited, Awarded date, Expiry date, and Status. The data rows are as follows:

Certification	First accredited	Awarded date	Expiry date	Status
Specialist Certificate in Change Management	01/01/2001	01/10/2010	24/07/2013	
Certificate in Programme and Project Support Office Essentials		01/08/2010	31/07/2013	
Intermediate Certificate in Enterprise and Solution Architecture		15/09/2010	14/09/2013	With BCS

## Invoices

To manage your invoices, click on the Invoice tab. The 'Invoice List' screen is displayed.



*The Invoice Tab*

### How to view invoices

To help you find the invoice you are looking for, you can filter by:

- Date type: Due Date, Exam Date or Invoice Date
- Certification
- Start Date
- End date

#### To search

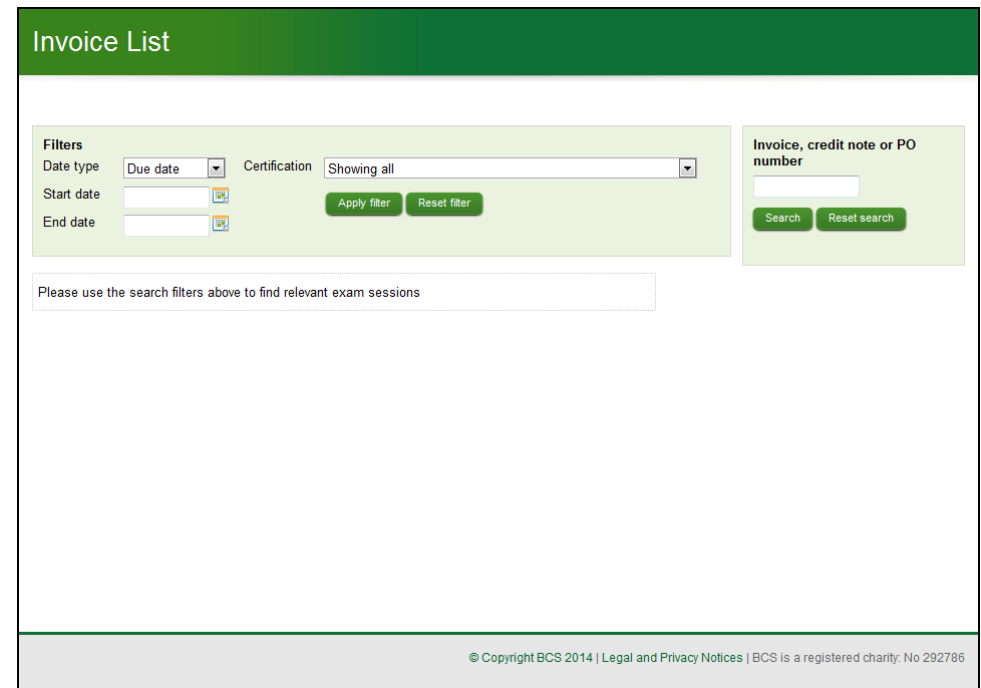
Apply the necessary filters and click on the 'Apply filter' to return filtered results

or

Enter the Invoice, credit note or PO number and click on the 'Search' button.

#### New search

Click the 'Reset filter' or 'Reset search' to clear the search parameters.



*The Invoices Screen*

Click on an invoice to display the details on the right hand side of the screen.

Click on the underlined invoice number in green to open the invoice as a pdf document

**Invoice**  
**Number:** [0000002227](#)  
**Date:** 16 July 2013  
**Amount:** 162.00 GBP

If a credit note has been raised against an Invoice  is displayed against the line item.

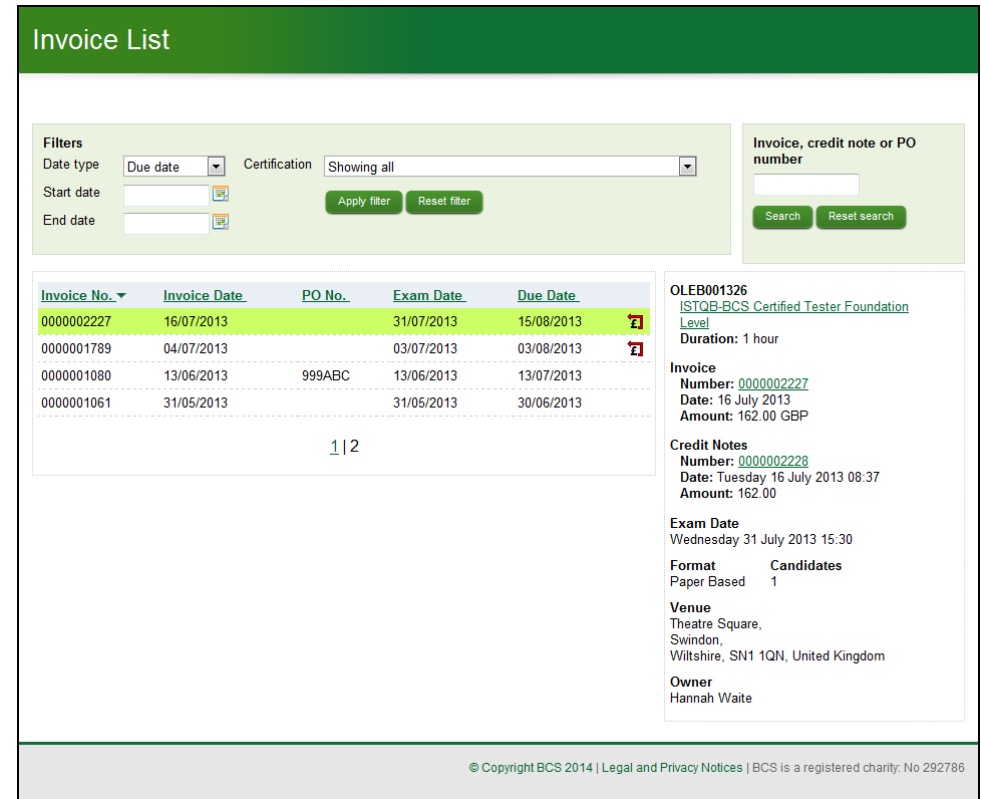
Click on the underlined credit note number in green to open the credit note as a pdf document

**Credit Notes**  
**Number:** [0000002228](#)  
**Date:** Tuesday 16 July 2013 08:37  
**Amount:** 162.00



Click on the name of the qualification in green to view the booking.

**OLEB001326**  
[ISTQB-BCS Certified Tester Foundation Level](#)

*Note: This link is not available for BA or SD Written examinations.*



The screenshot shows the 'Invoice List' interface. At the top, there are filters for 'Date type' (set to 'Due date'), 'Certification' (set to 'Showing all'), 'Start date', and 'End date'. There are 'Apply filter' and 'Reset filter' buttons. To the right, there is a search box for 'Invoice, credit note or PO number' with 'Search' and 'Reset search' buttons.

Invoice No.	Invoice Date	PO No.	Exam Date	Due Date	
<a href="#">0000002227</a>	16/07/2013		31/07/2013	15/08/2013	
0000001789	04/07/2013		03/07/2013	03/08/2013	
0000001080	13/06/2013	999ABC	13/06/2013	13/07/2013	
0000001061	31/05/2013		31/05/2013	30/06/2013	

OLEB001326  
[ISTQB-BCS Certified Tester Foundation Level](#)  
Duration: 1 hour  
**Invoice**  
**Number:** [0000002227](#)  
**Date:** 16 July 2013  
**Amount:** 162.00 GBP  
**Credit Notes**  
**Number:** [0000002228](#)  
**Date:** Tuesday 16 July 2013 08:37  
**Amount:** 162.00  
**Exam Date**  
Wednesday 31 July 2013 15:30  
**Format**      **Candidates**  
Paper Based      1  
**Venue**  
Theatre Square,  
Swindon,  
Wiltshire, SN1 1QN, United Kingdom  
**Owner**  
Hannah Waite

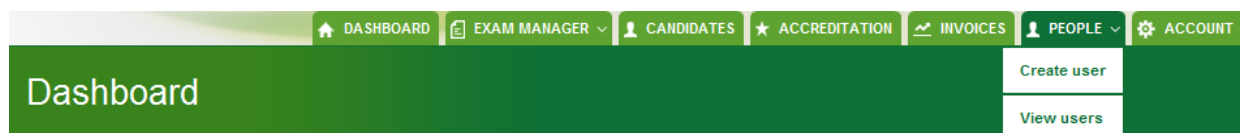
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The Invoices Screen – Example of Highlighted invoice



## People

To manage users access, click on the People tab and select 'Create User' to create a new user or .View User. to view and manage users.



The People Tab

## How to create Users

To create a new user, move your mouse over the People tab and click on Create User from the dropdown menu. The 'Create User' screen is displayed.

Enter the email address and select a role:

- Administrator - Access to Exam Manager, Candidates, Accreditation, Invoices and Account tabs
- Reporting User – Access to the Result Analyser Tool Only on the dashboard and Account tab
- SuperUser - Access to Exam Manager, Candidates, Accreditation, Invoices, People and Account tabs

Click [Continue]

A screenshot of a web application's 'User Management' screen. The title bar is dark green with the text 'User Management' in white. Below the title bar, the page has a white background. The main heading is 'Create user role'. There is a form with two sections. The first section is 'Email address', which has a text input field with a red asterisk to its left. The second section is 'Roles', which has three checkboxes: 'Administrator', 'Reporting User', and 'Super User'. At the bottom of the form, there are two buttons: a green 'Continue' button and a blue '[Cancel]' link.

The Create User Screen

*Note: Only one role is required for a user.*

Enter title, first name and surname

Click [Create]

The screenshot shows a 'User Management' interface with a green header. Below the header is a section titled 'Create user role'. The form contains the following fields: 'Email address' with the value 'sarah.smith@ace.test'; 'Title' with a dropdown menu showing 'Please select...'; 'First name' and 'Surname' fields, both marked with a red asterisk to indicate they are required; and 'Roles' with the value 'Administrator'. At the bottom of the form are two buttons: a green 'Create' button and a blue '[Cancel]' button.

The new user will receive an email message.

The user is required to click on the enclosed link to complete their registration and gain access to the system.

The screenshot shows the 'User Management' interface for a specific user. The header is green and says 'User Management'. Below the header is a link 'Back to dashboard'. The user's name 'Sarah Smith' is displayed. There are two tabs: 'User' (which is active) and 'Administrator'. A green information banner contains the text: 'This user needs to complete their registration in order to use this account. This can be done by following the instructions in the email that was sent to them when their account was created.' Below this, there are two fields: 'Name' with the value 'Sarah Smith' and a 'Modify' button, and 'Email address' with the value 'sarah.smith@ace.test' and a 'Modify' button.

## How to view Users

To view users, move your mouse over the People tab and click on View Users from the dropdown menu. The 'User Management' screen is displayed.

There are three tabs

- Administrators
- Super Users
- Reporting Users

Click on a user to view their details

## How to make a User Inactive

To make a user inactive or active again, view the user.

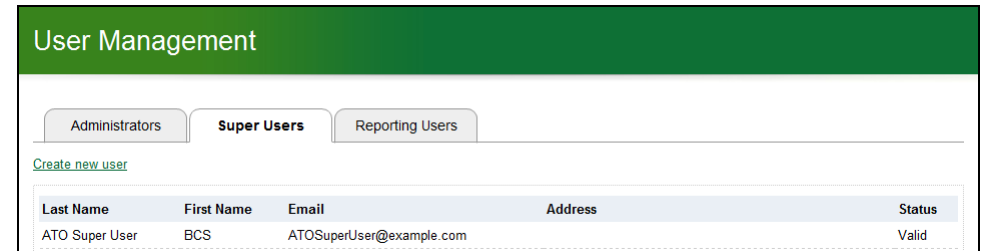
Click on the Super User tab to mark a user inactive or active.

Click on modify

Check the Active box as required

Click [Update]

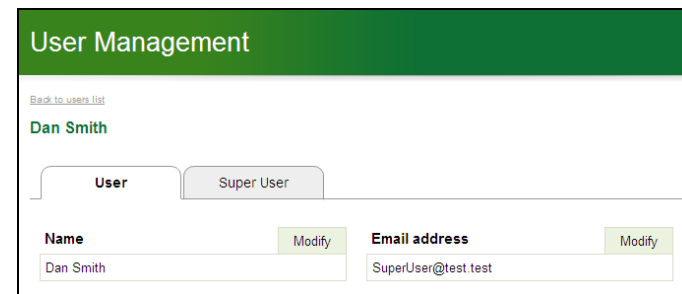
*A new user is automatically created as an active user.*



The screenshot shows the 'User Management' interface with a green header. Below the header are three tabs: 'Administrators', 'Super Users', and 'Reporting Users'. The 'Super Users' tab is selected. A link 'Create new user' is visible. Below the tabs is a table with the following data:

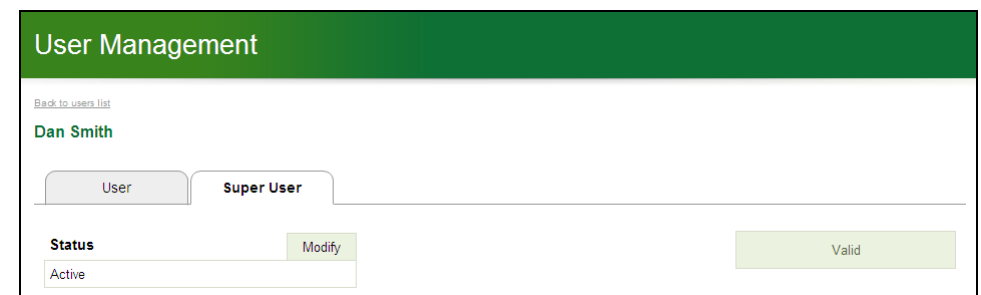
Last Name	First Name	Email	Address	Status
ATO Super User	BCS	ATOSuperUser@example.com		Valid

*The User Management Screen*



The screenshot shows the 'User Management - User Details' screen for 'Dan Smith'. It has a green header and a 'Back to users list' link. Below the header are two tabs: 'User' and 'Super User'. The 'Super User' tab is selected. There are two input fields: 'Name' with the value 'Dan Smith' and 'Email address' with the value 'SuperUser@test.test'. Each input field has a 'Modify' button next to it.

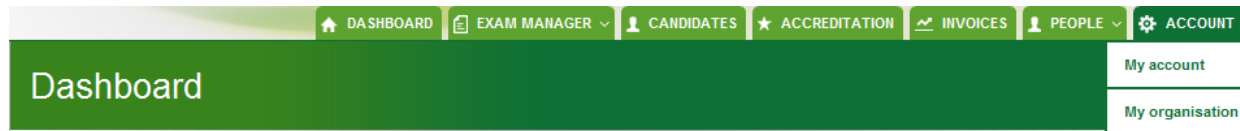
*User Management - User Details Screen*



The screenshot shows the 'User Management - User Active' screen for 'Dan Smith'. It has a green header and a 'Back to users list' link. Below the header are two tabs: 'User' and 'Super User'. The 'Super User' tab is selected. There is a 'Status' input field with the value 'Active' and a 'Modify' button next to it. To the right of the 'Status' field is a 'Valid' button.

*User Management - User Active Screen*

## Account



## My account

My account options are accessed from the Account tab. When you move your mouse over the tab, a dropdown menu is displayed, click on 'My account'.

This screen has two tabs:

### Personal details tab

This is where you can modify :

- Name
- Address
- Email
- Telephone number

A screenshot of the 'My Account' page, specifically the 'Personal details' tab. The page title is 'My Account' and the user's name is 'Jo Smith'. There are two tabs: 'Personal details' (selected) and 'Password'. The 'Personal details' tab contains four sections, each with a 'Modify' button: 'Name' (Jo Smith), 'Email address' (aceadmin@test.test), 'Address' (North Star House, North Star Avenue, Swindon, Wiltshire, SN2 1FA, United Kingdom), and 'Telephone numbers' ([Not specified]). At the bottom of the page, there is a footer with the text: '© Copyright BCS 2013 | Legal and Privacy Notices | BCS is a registered charity; No 292786'.

*My Account – Personal Details*

## Password tab

This is where you can modify your password.

- You will need to enter your current password and then input your new password twice.
- Click [Update] to change your password or Cancel to abandon any changes.

**My Account**

Jo Smith

Personal details **Password**

Current password \*

New password \*

Confirm new password \*

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*My Account – Change Password*

## My Organisation

My organisation options are accessed from the Account tab. When you move your mouse over the tab, a dropdown menu is displayed, click on 'My organisation'.

This screen lists your:

- Organisation details
- General enquiry details
- Main contact details
- Candidate contact information that will be displayed in the candidate portal with the candidate result
- Finance details

*Note: The fields will be pre-populated. To change your organisation name or address please contact the BCS Accreditation team.*

Make any modifications required.

### Organisation

#### Your Organisation

Organisation name/address  
To change your organisation name or address please contact the BCS accreditation team

Organisation name \* Ace Training Org1

Department

Country United Kingdom

Address line 1 North Star House

Address line 2 North Star Avenue

Town / City Swindon

County / State

Post code / Zip SN2 1FA

Main telephone 01793417417

Website address \* www.bcs.org.uk

Status Active

Date first accredited

Renewal date

*My Organisation – Organisation details*

## Enter General Enquiries and Main Contact details

General Enquiries	
First name	* <input type="text" value="Jo"/>
Surname	* <input type="text" value="Smith"/>
Email	* <input type="text" value="jo.smith@test.test"/>
Telephone	* <input type="text" value="01793417417"/>

Main Contact	
First name	* <input type="text" value="Sue"/>
Surname	* <input type="text" value="Smith"/>
Email	* <input type="text" value="sue.smith@test.test"/>
Telephone	<input type="text" value="01793417417"/>

*My Organisation – General Enquiries and Main Contact Details*

## Enter Candidate Contact Information


The details entered here will be displayed in the candidate portal for candidates who have sat examinations with your organisation that have been booked through the e-professional system.

- Your Display Name – pre-populated from the Organisation name
- Your website URL – pre-populated from the Website address
- Your email address – enter an address that candidates can contact your organisation for further information for further training requirements or re-sits.
- Your logo – click on Browse to upload your logo to appear by your Organisation name in the candidate Portal
- Result pass message text – Prepopulated with suggested text and can be edited for your organisation
- Result fail message text - Prepopulated and can be edited for your organisation

*Note: The text should be for information purposes to candidates only. Review regularly to make sure it is up to date. This data will be reviewed by BCS who will contact you if there are any issues.*

### Candidate Contact Information

For exams taken within your organisation the following information is displayed on the candidate portal.

Your display name	★	<input type="text" value="Test Account - BCS"/>
Your website URL	★	<input type="text" value="http://certifications.bcs.org/"/>
Your email address		<input type="text" value="certifications@hq.bcs.org.uk"/>
Your logo		<input type="text"/> <input type="button" value="Browse..."/> <small>Your logo must be a maximum of 200px wide and 50px high</small> 
Result pass message text	★	<input type="text" value="Congratulations on passing your examination. If you have any future training requirements and would like to attend a course from our portfolio please visit our website for more information."/>
Result fail message text	★	<input type="text" value="If you would like to book an examination or re-sit please visit our website for more information."/>

My Organisation – Candidate Contact Information



### Enter Finance details

All Finance Contact fields must be populated for BCS to invoice against bookings.

Additional invoice addresses can be added by clicking on the [Add Additional Invoices] button and you will be led through a process to capture the required information

Payment Preferences – select yes for a purchase order to be entered in a booking as mandatory.

Mandatory fields need to be completed before saving changes.

Click [Save] to apply changes.

#### Finance Contact

First name	*	<input type="text" value="Finance"/>
Surname	*	<input type="text" value="Manager"/>
Email	*	<input type="text" value="finance.manager@test.test"/>
Telephone	*	<input type="text" value="01793417417"/>

#### Finance Information and Invoicing

Company registration number	<input type="text" value="123456"/>	
Invoice address	*	<input checked="" type="radio"/> Same as organisation address <input type="radio"/> A different address

#### Additional invoice addresses

#### Payment Preferences

Will a PO number be required for every exam booking you make with us? \*

Yes  
 No

*My Organisation – Finance Details*



