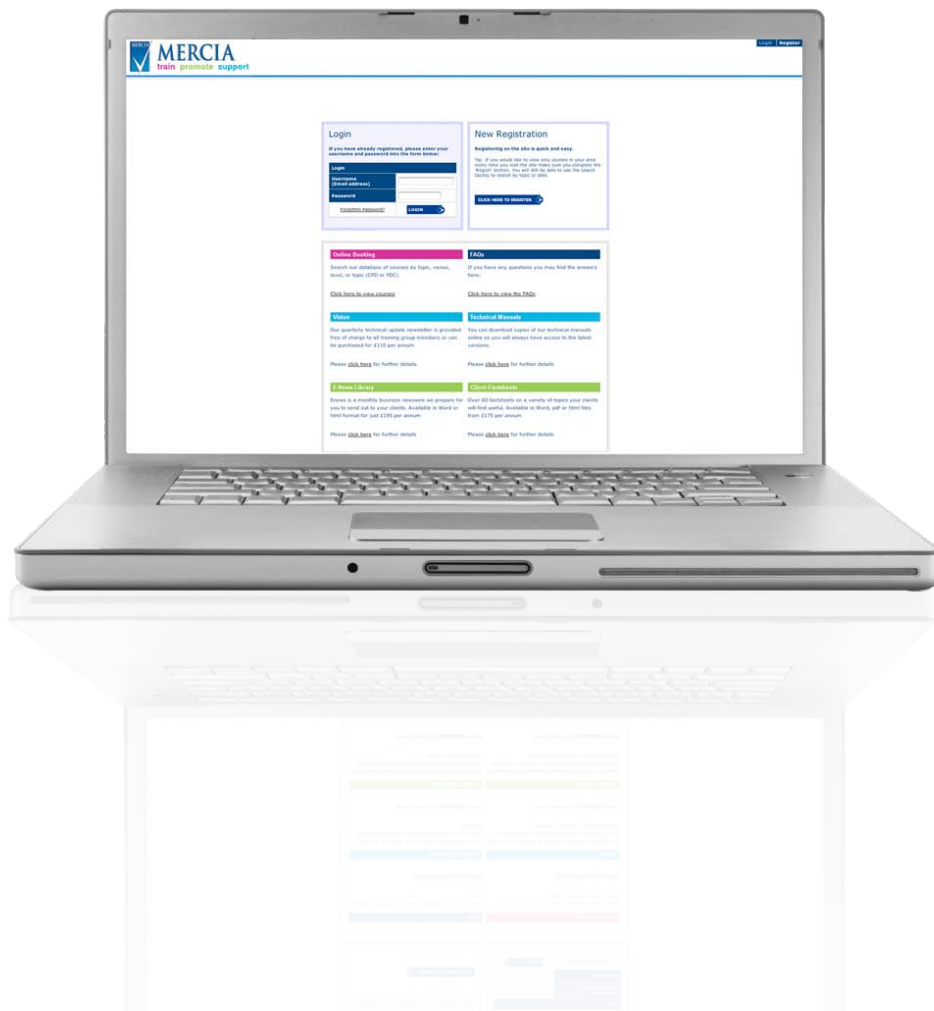




Online Services Guide



train

promote

support

Online Services Guide

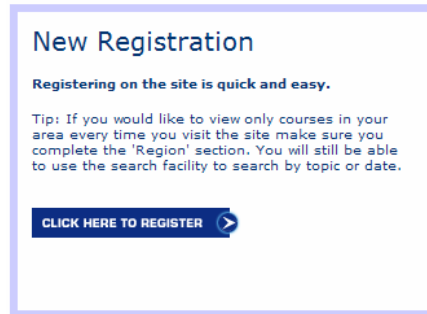
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1. Registering

There are three different scenarios that you may find yourself in when wanting to register on the website.

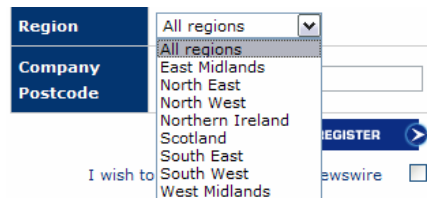
1.1. A new client registering on Online Services Site

1. Select the 'click here to register' link on the home page.



2. Fill in the form on the following page with the correct contact details.

3. When filling in this form you can choose the region that your business is located in, this will help locate courses within your region. To do this select an area from the list in the region drop down box.



4. Then select the register link at the bottom of the page, you will receive a registration email containing your account details and your KeyCode, for further information on KeyCodes, see section 3. 'What is the KeyCode?'.

1.2. An existing client with an Online Services Site Account already created

If you are part of a company that is already registered with the Online Services website then you should not register again as a new company. In order for you to have an account on the Online Services site you need to contact who ever has created the original account for your company. You can then be added as a user to the account, access to the website will depend on your user type. For further information see section 14. 'How do I add a user?'.

1.3. An existing client without an Online Services Site Account

An existing company within the Mercia database can also register for use on the Online Services, as soon as the have registered on the site they can be authenticated and will be able to be confirmed on courses and gain access to any Digital Publications that they have signed up to. To register on the website please follow the steps shown in 1.1.

2. Log in

2.1. How do I log in?

1. Enter your username (email address) and your password in the login box.



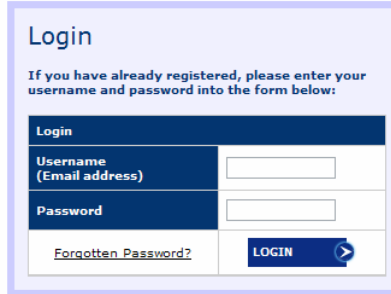
The screenshot shows a 'Login' form with the following elements:

- Title: Login
- Instruction: If you have already registered, please enter your username and password into the form below:
- Fields:
 - Username (Email address): john@jsmith.co.uk
 - Password: masked with dots
- Links: Forgotten Password? and LOGIN button with a right arrow icon.

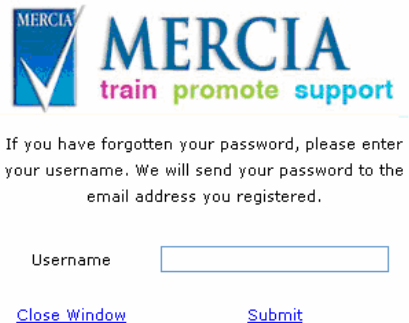
2. Then select the 'Login' button
3. If this is your first time that you are logging in on a new account then you will be asked to enter the KeyCode that you received upon registering. Your password will be set as password but you will be prompted to enter and confirm a new password to be used with the online booking account.

2.2. Forgotten password

1. Select the 'forgotten password' link on the home page.



2. This will open up a new window, enter your email address (the one you registered with) and select the 'Submit' link.



3. An email will be sent to you containing your password.

3. What is the KeyCode?

The KeyCode is generated the first time you register for Mercia's online services. It will be sent to you in an email shortly after registering, this is required to activate the account and you will be prompted to do so the first time you log in.



Once the KeyCode is entered you will gain access to the site immediately. The KeyCode is also required by new users set up on an existing Mercia online account. It will have to be entered the first time that the new user logs into the account. Your KeyCode will expire on the 1st July 2009, you will be issued with a new code and will have to re-enter the new code when prompted. The KeyCode is needed to stop employees no longer working for your firm accessing your online information e.g. digital publications.

3.1. How do I find out what my KeyCode is?

The email containing the KeyCode will look like the following and this is emailed to you the first time you register on the site and then every time a new user is added to the account.

Hello Mr Williams

Your unique login is: a.williams@company.co.uk

Your password is: password

You will be required to change your password the first time you log into Online Booking.

You will also need to enter the following code when you first log-on, this is to activate your account.
Keycode: 123456789

Mercia Group Limited is a company registered in England and Wales with company number 1464141.

Registered Office: Paulton House, 8 Shepherdess Walk, London N1 7LB.

If you have lost your KeyCode then you can request that your KeyCode to be re-sent. To do this either email onlineservices@mercia-group.co.uk or telephone the team on 0116 258 1200.

4. How do I find a course online?

If you have registered with the website you will have the option of filtering your search to display courses localised by region, please see 4.1 for instructions. Alternatively, you can also search for courses without registering, you will be able to access course details, dates and venues but will not be able to book online, please see 4.2 for instructions.

4.1. If you have registered with the website

1. Log onto the site.
2. Then select the 'Online Booking' link at the top of the page.

[Home](#) | [My Details](#) | [Online Booking](#) | [FAQs](#) | [Vision](#) | [E-News Library](#) | [Client Factsheets](#) | [Technical Manuals](#) | [Log Out](#)

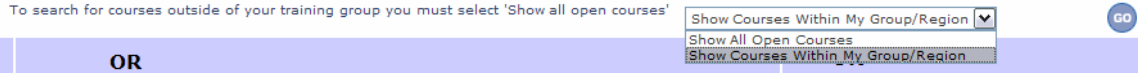
3. If you are on the 'My Services' page, select the 'online booking' link from the list

Online Booking

Search our database of courses by topic, venue, level, or topic (CPD or PDC).

[Click here to view courses](#)

4. This will bring you to the Course Selection page; it will be set to show you only courses within your specific group or region.
5. To view all courses that are available you must select 'Show All Open Courses' from the drop down menu above the search options, and then select go.



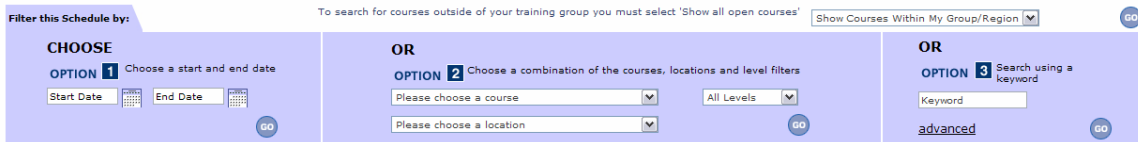
6. In order to refine your search you can use the search options provided on the Course Selection page.

Option 1 To find a course by date, you can enter the start and end dates (under option 1) and then select go.

Option 2 To find a course by name, location or level select the required information from the drop down boxes (under option 2) and then select go.

Option 3 To search using a keyword, enter the keyword in the search box (under option 3) and select then select go.

Please note: If you have selected to 'Show All Open Courses' all courses will be displayed, if you have selected a specific group or region, only courses within that area will be displayed.



7. To view more details about a course you can select the 'More Details' button along the right hand side of the page or click on the course name.

8. To view details about the course venue, click on the course venue name.

Course Name	Venue	Location	Speaker	Date	Start Time	End Time	Course Level	Course Category	Cost	MORE DETAILS
Principles of Bookkeeping	Devonshire Place, Leicester	East Midlands	David Gallagher first	01/09/2008	09:30	17:00	Staff Courses	Audit and Accounting	£90.00	BOOK NOW!

4.2. If you are not registered with the website

1. Then you can choose to register or you can view courses without registering, however if you do not register then you will not be able to book courses online.
2. Select the 'online booking' link at the top of the page. Then select 'Click here to view courses'.

Online Booking

Search our database of courses by topic, venue, level, or topic (CPD or PDC).

[Click here to view courses](#)

3. This will bring you to the 'Course Selection' page and you will be shown a list of all of the courses available.
4. In order to refine your search you can use the search options provided on the Course Selection page.

The screenshot shows a search interface with three options. Option 1 is for date-based searches, Option 2 is for filtering by course, location, and level, and Option 3 is for keyword searches. Each option has a 'GO' button.

Option 1 To find a course by date, you can enter the start and end dates (under option 1) and then select go.

Option 2 To find a course by name, location or level select the required information from the drop down boxes (under option 2) and then select go.

Option 3 To search using a keyword, enter the keyword in the search box (under option 3) and select then select go.

5. To view more details about the a course you can select the 'More Details' button along the right hand side of the page or click on the course name.
6. To view details about the course venue, click on the course venue name.

Course Name	Venue	Location	Speaker	Date	Start Time	End Time	Course Level	Course Category	Cost	
Principles of Bookkeeping	Devonshire Place, Leicester	East Midlands	David Gallagher-first	01/09/2008	09:30	17:00	Staff Courses	Audit and Accounting	£90.00	MORE DETAILS BOOK NOW!

7. If you then select book now you will be taken to the home page to register as you cannot book a course unless you are registered.

5. Enrolling on a course online

1. After finding the course you want, click on the 'Book Now' button to book places on the course or click more details to see more information, for example the start times or venue.

Places	Sally Hutchings	19/09/2008	14:00	17:00	Staff Courses	Taxes	£45.00	MORE DETAILS	BOOK NOW!
--------	-----------------	------------	-------	-------	---------------	-------	--------	------------------------------	---------------------------

2. After clicking 'Book Now', course details will be displayed along with the option to add more people on to the course; you can do this by changing the number of places. Then click 'Go to Step 2'

1 Confirm Places 2 Confirm Delegates 3 Check Details 4 Book Places

Courses Waiting To Be Confirmed

Please confirm the details of your selected courses:

Course Name	Venue	Location	Speaker	Date	Start Time	End Time	Course Level	Course Category	Cost	Discount Per Person	Sub Total	Number Of Places	
Introduction to VAT	PUFC	Eastern Counties	Sally Hutchings	19/09/2008	14:00	17:00	Staff Courses	Taxes	£45.00	£0.00	£45.00	1	DELETE
TOTAL:											£45.00		

[ADD ANOTHER COURSE](#) [GO TO STEP 2](#)

3. You now have the option to add new or existing delegates onto the course(s) you have selected. To take advantage of the training record facility available, it is important to include delegate names where possible. For further information, see section 7. 'Your training record'.

1 Confirm Places 2 Confirm Delegates 3 Check Details 4 Book Places

Confirm Delegates

Please click on the course(s) and complete the name(s) of the delegate(s) attending.

You do not need to complete the delegate names for CPD courses but if you do this information will be retained for you to refer to in future.

Introduction to VAT(Staff Courses) - 19/09/2008 - PUFC

[BACK](#) [CONFIRM THESE DETAILS](#)

4. To add delegates to the course click on the blue bar that contains the courses name. It will open up enabling you to enter delegate's names.

5. The delegates that appear under the existing delegates section match with those stored on the Mercia database.

VAT Healthcheck(Staff Courses) - 07/04/2009 - Strathdon Hotel

Please Confirm Details of the Delegates Attending This Course

		Forename	Surname
New Delegate	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Existing Delegate	<input checked="" type="radio"/>	<div style="border: 1px solid black; padding: 2px;"> Please Choose v Please Choose Andrew Smith Anita Person Brian Anyone Dalla Watson Michelle Hammond test test Wayne Watson Zoe Canham </div>	

[BACK](#) [CONFIRM THESE DETAILS](#)

6. Once the delegates names have been entered select 'Confirm These Details'.

7. Course and delegate details along with the total price for the course(s) will appear. If correct, click 'Confirm & Book Places'. If not, click the back button to change the appropriate details on the previous screen.

VAT Healthcheck(Staff Courses)

Please Confirm Details of the Delegates Attending This Course

Forename	Surname
Andrew	Smith
Delegate Total £45.00	

Course Total
£45.00

Grand Total excl. vat
£45.00

[BACK](#) [CONFIRM & BOOK PLACES](#)

8. The final screen will show a summary of your booking, a provisional confirmation email will be sent automatically. If you do not receive a provisional confirmation email, please contact Enrolments on 0116 258 1200.

An email has been sent to confirm your booking request.

VAT Healthcheck(Staff Courses)

Forename	Surname
Andrew	Smith
Delegate Total £45.00	

Course Total
£45.00

Grand Total excl. vat
£45.00

6. How do I view my course enrolment history?

1. Once you are logged onto the course booking site, click on 'Online Services' at the top of the page.
2. Then select 'My Booked Courses' at the top of the page.
3. This will bring up a list of your provisional bookings and confirmed bookings.
 - a. Provisional bookings - These are bookings that have been generated on the website but have not yet been added onto the database.

- b. Confirmed bookings - These are bookings that have been made on the website and have been added into the database.
4. To view courses that have already taken place you have to select the 'Include Past Courses' tick box and then select go.
5. To view the delegate information on the summary page, select 'Include Delegate Information' tick box and then select go.
6. You can then download a copy of a .CSV file containing a list of your booked courses and previous courses to your PC. To do this click on the 'Download .CSV Data File' link towards the bottom left hand side of the screen.

7. Your training record

As a 'Member Co-coordinator' you can view the course you have booked as well as the course (s) booked by colleagues. This information can be used to create individual training records, accessible whenever required.

The training record will show all Mercia courses but for your convenience can also be supplemented with other training you have undertaken with other providers, giving you a complete training record.

1. To download an individuals training record after logging in select 'My booked courses'
2. Enter the from and to dates that you would like to cover in the training record and click go



Training Records: from 1 Jan 2008 to 10 Dec 2008
Show My Information GO

3. Details of the Mercia training courses attended and number of CPD hours will appear along with a summary. At this stage you can click on 'Download .PDF Training Records Summary Data File' and the summary will be converted into a training record.
4. There is also the facility to record any additional training you have completed with other training providers. To do this, populate the required information and click 'add'.

Training Records 1/1/2009 to 25/2/2009: Kimberley Browne

Continued Professional Development Record - Provided by Mercia		
Course Title	Date	Duration
Audit & Accountancy Update	24/02/2009	3.25
Auditing: First Principles	13/01/2009	3.5
Sage 50 : The Advanced Modules	08/01/2009	7.5
How to Audit Series - Day 3	15/01/2009	7.5
How to Audit Series - Day 1	13/01/2009	3
How to Audit Series - Day 2	14/01/2009	7.5
Total Continued Professional Development Hours:		32.25

Additional Professional Development Record				
Description	Type	Date	Duration Hours	
<input type="text"/>	DVD	25 Feb 2009	<input type="text"/>	<input type="button" value="Add"/>
Total Additional Professional Development Hours:			0	

Summary	
Total Number of Hours:	32.25
Total Professional Development Centre Hours:	32.25
Total Continuing Professional Development Hours:	0
Download .PDF Training Records Summary Data File	

5. Click on 'Download .PDF Training Records Summary Data File' and the summary will be converted into a training record.



Training Records : Kimberley Browne

Continued Professional Development Record - Provided by Mercia

Course Title	Date	Duration
Audit & Accountancy Update	24/02/2009	3.25
Auditing: First Principles	13/01/2009	3.5
Sage 50 : The Advanced Modules	08/01/2009	7.5
How to Audit Series - Day 3	15/01/2009	7.5
How to Audit Series - Day 1	13/01/2009	3
How to Audit Series - Day 2	14/01/2009	7.5
Total:		32.25

Additional Professional Development Record

Course Title	Type	Date	Duration
Total:			0

Summary

Total Number of Hours:	32.25
Total Professional Development Centre Hours:	32.25
Total Continuing Professional Development Hours:	0

8. How do I add a delegate to a booked course?

In order to add a delegate online the booking must have originally been made via the website.

1. Once you are logged into the course booking site, click on the 'My Booked Courses' link at the top of the page.



2. Click on the name of the course that you wish to add an extra delegate to.

Booked Courses

Filter this List by:
 Show My Information All Show Delegate Information Include Past Courses

Provisional Bookings					
Course	Date	Location	Classification	Number Of Bookings	
Finance Act 2008	02/09/2008	South East England	CPD		1
Accounting Standards Refresher	16/12/2008	East Midlands	CPD		1
Introduction to VAT	19/09/2008	Eastern Counties	Staff Courses		1
Money Laundering: What You Need to Know	20/10/2008	East Midlands	Staff Courses		3
Bookkeeping: The Next Stage	02/09/2008	South West England	Staff Courses		1
Total					7

3. Scroll down to the add delegate table.

Add Delegate	
Forename	Surname
John	Smith
Existing	
Please Choose	
Add	

- a. If you have added users under the 'My Users' section, their names will appear under existing users in the drop down box.
- b. If the new delegate doesn't appear in the drop down box, enter their forename and surname into the boxes provided. Then click the 'Add' button at the bottom of the table.

Add Delegate	
Forename	Surname
Existing	
Please Choose	
Please Choose	
Andrew Smith	
Anita Person	
Brian Anyone	
Add	

- c. The delegates' name you have just entered will now appear in the scroll down menu under the 'Existing' heading. Select the delegates name and click on the 'Add' button.

Add Delegate	
Forename	Surname
Existing	
John Smith	
Add	

- d. If the delegate is an existing delegate then select their name from the drop down box in the 'Add Delegate' table.

Add Delegate	
Forename	Surname
Existing	
Please Choose	
Please Choose	
Andrew Smith	
Anita Person	
Brian Anyone	
Add	

- e. Then click the 'Add' button at the bottom right of the table.

Add Delegate	
Forename	Surname
<input type="text"/>	<input type="text"/>
Existing	
<input type="text" value="Anita Person"/> ▼	
<input type="button" value="Add"/>	

9. How do I download course notes/slides?

There are currently notes and slides online for all Mercia non-specialised CPD courses.

You will need a copy of Adobe Acrobat Reader installed on your PC to view or download pdfs.

9.1. Full National/Local members:

1. Once you are logged onto the 'Course Booking Site' click on the 'Notes/Slides' link at the top right of the page



2. To download the notes/slides right click on either the 'Course Notes' or 'Course Slides' options and select Save Target As.

Company Law Update	Menzies Cambridge Hotel (prev Moat Hs)	19/06/2008	Course Notes	Course Slides
Company Law Update	Derby County Football Club	18/06/2008	Course	ies
Company Law Update	Village Hotel & Leisure Club x	18/06/2008	Course	ies
Company Law Update	St George's Banqueting & Conf Centre, Northampton	16/06/2008	Course	ies

3. Then select the location where you would like to download the notes/slides to and select save.
4. To view the notes/slides online left click on either the 'Course Notes' or 'Course Slides' options and the document will open.

9.2. If you book your courses on a Pay As You Go basis:

1. Once you are logged onto the 'Course Booking Site' click on the 'Notes/Slides' link at the top right of the page



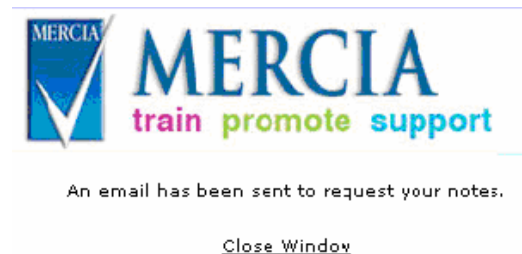
2. Locate the course that you wish to view the notes or slides for from the list
3. Then select the 'Course Notes' or 'Course Slides' option depending on what you wish to view.

Company Law Update	Manzies Cambridge Hotel (prev Moat Hs)	19/06/2008	Course Notes - £0.00	Course Slides - £0.00
--------------------	--	------------	--------------------------------------	---------------------------------------

4. This will then open up a window asking you to confirm your choice.



5. If you wish to continue select the 'Request Notes/Slides' link in the centre of the window. If you do not want to continue then select 'Close Window' to return to the Notes/Slides page.
6. Once you have selected 'Request Notes/Slides' the window will then verify this and you will receive an email containing your notes and/or slides.



10. How do I change my login details?

1. Log onto the site and select the 'My Details' link at the top of the page.



2. Enter your amended details in the text boxes in the 'member information' or 'address information'.

Edit Member

[APPLY ALL CHANGES](#) >

To navigate away from this screen, please use the menu above.

Member Information:	
Member:	<input type="text" value="Mercia Group Ltd"/>
Contact Name:	<input type="text" value="Andrew Smith"/>
Contact Email:	<input type="text" value="a.smith@mercia-group.co.uk"/>
Contact Telephone:	<input type="text" value="01162581200"/>

Address Information:	
Company Address 1	<input type="text" value="Mercia Group Limited"/>
Company Address 2	<input type="text" value="Best House"/>
Company Address 3	<input type="text" value="Grange Business Park"/>
Company Town	<input type="text" value="Leicester"/>
Company Address County	<input type="text" value="Leicestershire"/>
Company Postcode	<input type="text" value="LE8 6EP"/>

3. Once completed click on the 'Apply All Changes' button located at the top of the page.

11. How do I change my password?

1. Log onto the site and select the 'My Details' link at the top of the page.

[Home](#) | [My Details](#) | [Online Booking](#) | [FAQs](#) | [Vision](#) | [E-News Library](#) | [Client Factsheets](#) | [Technical Manuals](#) | [Log Out](#)

2. Then select the 'My Password' link near the top right of the page.

[Course Selection](#) | [Course Confirmation](#) | [CPD Programme](#) | [PDC Programme](#) | [Management](#) | [Notes/Slides](#) | [Logout](#)

[/ My Password](#) / [My Booked Courses](#) / [My Details](#) / [My Services](#)

3. Enter your current password into the 'current password' text box.

Edit User

APPLY ALL CHANGES >

My Profile:

Forename	Surname	Email Address
<input type="text" value="Andrew"/>	<input type="text" value="Smith"/>	<input type="text" value="mercia-group.co.uk"/>

I wish to receive the Mercia Newswire e-Newsletter

Password:

Current Password	New Password	Confirm New Password
<input type="text"/>	<input type="text"/>	<input type="text"/>

APPLY ALL CHANGES >

4. Enter your new password first into the 'new password' box and then into the 'confirm new password box'.
5. Then click the 'Apply All Changes' button.

12. How do I delete a user?

You are unable to delete a user from your account but you can disable their access and hide them from view by removing the tick their active box (you do this by clicking on the tick).

1. Once you are logged into the course booking site, click on the 'My Users' link at the top right side of the screen.

[/ My Password](#) / [/ My Booked Courses](#) / [/ My Details](#) / [/ My Services](#)

2. Scroll down the page to the table called 'Individual Users'

All ▾

Individual Users:						
Title	Forename	Surname	Email Address	Permission		Active
<input type="text" value="Michelle"/>	<input type="text" value="Michelle"/>	<input type="text" value="Hammond"/>	<input type="text" value="michelle.hamond@r"/>	<input type="text" value="Booking"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>
<input type="text" value="Ann"/>	<input type="text" value="Ann"/>	<input type="text" value="Steer"/>	<input type="text" value="ann.steer@mercia-g"/>	<input type="text" value="View Only"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>
<input type="text" value=""/>	<input type="text" value="Dalila"/>	<input type="text" value="Watson"/>	<input type="text" value="dalila_watson@yaho"/>	<input type="text" value="Member Co-ordinator"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>
<input type="text" value="Mrs A Person"/>	<input type="text" value="Anita"/>	<input type="text" value="Person"/>	<input type="text" value="anita.person@merci"/>	<input type="text" value="Member Co-ordinator"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>

3. Locate the user that you wish to deactivate and remove the tick from their active box.

All ▾

Individual Users:						
Title	Forename	Surname	Email Address	Permission		Active
<input type="text" value="Michelle"/>	<input type="text" value="Michelle"/>	<input type="text" value="Hammond"/>	<input type="text" value="michelle.hamond@r"/>	<input type="text" value="Booking"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>
<input type="text" value="Ann"/>	<input type="text" value="Ann"/>	<input type="text" value="Steer"/>	<input type="text" value="ann.steer@mercia-g"/>	<input type="text" value="View Only"/>	<input type="text" value=""/>	<input type="checkbox"/>
<input type="text" value=""/>	<input type="text" value="Dalila"/>	<input type="text" value="Watson"/>	<input type="text" value="dalila_watson@yaho"/>	<input type="text" value="Member Co-ordinator"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>
<input type="text" value="Mrs A Person"/>	<input type="text" value="Anita"/>	<input type="text" value="Person"/>	<input type="text" value="anita.person@merci"/>	<input type="text" value="Member Co-ordinator"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>

- Then scroll down to and click the 'Apply All Changes' button.



- To hide the deactivated users from view locate the drop down menu above the 'Individual Users' table.

All

All
Active
In-Active

Individual Users:					
	Forename	Surname	Email Address	Permission	Active
Michelle	Michelle	Hammond	michelle.hamond@r	Booking	<input checked="" type="checkbox"/>
Ann	Ann	Steer	ann.steer@mercia-g	View Only	<input type="checkbox"/>
	Dalila	Watson	dalila_watson@yaho	Member Co-ordinator	<input checked="" type="checkbox"/>
Mrs A Person	Anita	Person	anita.person@merci	Member Co-ordinator	<input checked="" type="checkbox"/>

- Then to view only active users select 'Active Members' from the drop down menu.

Active

Individual Users:					
Title	Forename	Surname	Email Address	Permission	Active
Michelle	Michelle	Hammond	michelle.hamond@r	Booking	<input checked="" type="checkbox"/>
Ann	Ann	Steer	ann.steer@mercia-g	View Only	<input checked="" type="checkbox"/>
	Dalila	Watson	dalila_watson@yaho	Member Co-ordinator	<input checked="" type="checkbox"/>
Mrs A Person	Anita	Person	anita.person@merci	Member Co-ordinator	<input checked="" type="checkbox"/>

- To view only In-Active (deactivated) users select 'In-Active' from the drop down menu.

In-Active

Individual Users:					
Title	Forename	Surname	Email Address	Permission	Active

13. How do I delete a delegate?

This is the same as deleting a user, you must make them inactive to hide them, see section 12. 'How do I delete a user' for full instructions.

14. How do I add a user?

- Once you are logged onto the course booking site click on the 'My Users' link towards the top right side of the screen.
- Scroll down the page to the 'Add User to Member' table.

Add User to member:					
Salutation	Forename	Surname	Email Address	Permission	
				Booking	ADD USER

Note: When you create a user account, the password will default to "password", and must be changed the first time the user logs in with their new account.

I wish to receive the Mercia Newswire e-Newsletter

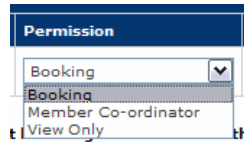
3. Enter the users' salutation, forename, surname and email address. Ensure the email address is correct and unique as this will be their username when they log onto their online booking account.

Add User to member:					
Salutation	Forename	Surname	Email Address	Permission	
Mr	Jamie	Guntert	jamie.guntert@merc	Booking	ADD USER ➔

Note: When you create a user account, the password will default to "password", and must be changed the first time the user logs in with their new account.

I wish to receive the Mercia Newswire e-Newsletter

4. Next you have to choose the permission type you wish to give the new user:



The image shows a dropdown menu titled 'Permission'. The current selection is 'Booking'. The menu is open, showing three options: 'Booking', 'Member Co-ordinator', and 'View Only'.

- a. **Member Co-ordinator** - A member co-coordinator can book multiple places on courses for themselves and others and view the bookings of other users in the company as well as generating training records for the firm.
 - b. **Booking Permission** - A user with booking permission only will be able to book places on courses for themselves but cannot view bookings made by other users.
 - c. **View Only** - A view only user will be able to see the courses that are available on the online booking website and will not be able to view any bookings that have been made by the company, or book any places for themselves.
5. Then select whether the new user would like to receive the Mercia Newswire e-Newsletter by selecting the tick box.

Note: When you create a user account, the password will default to "password", and must be changed the first time the user logs in with their new account.

I wish to receive the Mercia Newswire e-Newsletter

6. Then click on the 'Add User' button to the right of the table.



The image shows a close-up of the 'ADD USER' button from the form above. The button is blue with white text and a right-pointing arrow.

15. How do I add a delegate?

1. Once you are logged onto the course booking site click on the 'My Users' link towards the top right side of the screen

[/ My Password](#) / [/ My Booked Courses](#) / [/ My Details](#) / [/ My Services](#)

2. Scroll down the page to the 'Add Delegate to member' box

Add Delegate to member:		
Forename	Surname	
<input type="text"/>	<input type="text"/>	ADD DELEGATE ➔

3. Enter the delegates forename and surname
4. Click on the 'Add Delegate' link
5. Click on the 'Apply All Changes' link

[APPLY ALL CHANGES](#) ➔

16. How do I view my digital publications?

You can only view the digital publications that you have subscribed to. To access your digital publication:

1. Firstly, log onto the Mercia online website, accessed via the 'login' link on the Mercia Home Page.
2. Once logged on you can gain access to the individual subscriptions by using the links provided on the home page; either the top of the page or from the main section in the centre of the page.

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Online Booking
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FAQs
If you have any questions you may find the answers here:
[Click here to view FAQs](#)

Vision
Vision is the name of our quarterly technical update newsletter. It is included as part of our membership package or can be purchased for £110 per annum.
Please [click here](#) for further details.

Technical Manuals
Our audit manual and a selection of our specialist assignment manuals are available to download online so you always have access to the latest version.
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E-News Library
We can provide you with eight or more topical articles a month for you to email to your clients and/or include on your website. The latest issue is available to download online in Word format or as an html file.
Please [click here](#) for further details.

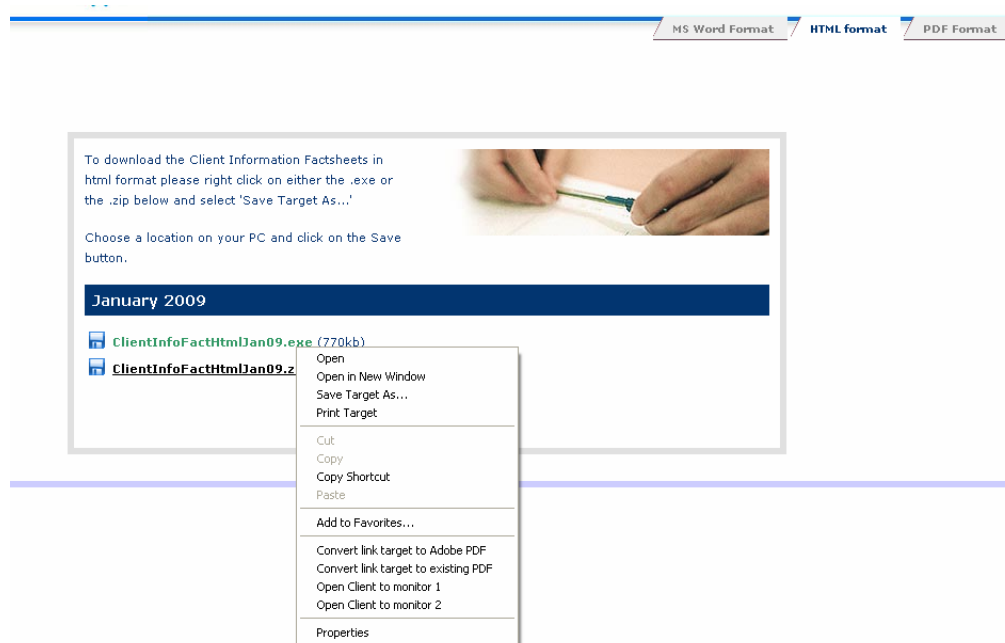
Client Factsheets
Over 60 factsheets of topical information your clients would find useful. You can include them on your website or display in your reception. Whichever format you chose the latest issue is available to download online.
Please [click here](#) for further details.

3. Once on the page for the subscription you require, you can view the subscription online by left clicking on the link, or you can download it by right clicking on the link and

selecting 'save target as'. Then select the location where you would like to save the document to and click 'save'.

16.1. Client Factsheets

1. Firstly, log onto the Mercia online website
2. Once logged on you can gain access to the individual subscriptions by using the links provided on the home page.
3. Once in the client Factsheet area you can select the Factsheet that you wish to view




4. Then right click on the Factsheet you wish to download and select 'save target as'.

16.2. Technical manuals



1. Firstly, log onto the Mercia online website
2. Once logged on you can gain access to the individual subscriptions by using the links provided on the home page.
3. Once in the technical manual area select the technical manuals that you wish to view

Please see the list below for available Special Assignment Manuals. To download your manual, right click on it and select 'Save Target As'.










If you experience any problems when using our manuals please refer to our [FAQ's](#)

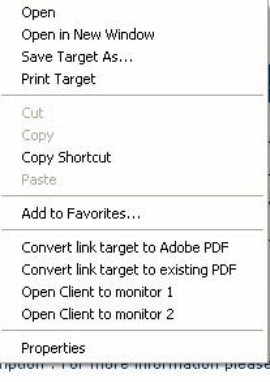


Your technical manuals

-  [SAM SAR 4.0](#)
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- Open
- Open in New Window
- Save Target As...
- Print Target
- Cut
- Copy
- Copy Shortcut
- Paste
- Add to Favorites...
- Convert link target to Adobe PDF
- Convert link target to existing PDF
- Open Client to monitor 1
- Open Client to monitor 2
- Properties

4. Then right click on the manual you want to download and select 'save target as'.


16.3. Vision

1. Firstly, log onto the Mercia online website
2. Once logged on you can gain access to the individual subscriptions by using the links provided on the home page.
3. Once on the vision page right click on the newsletter you wish to download and then select 'save target as'.





The Vision technical update newsletters are available for downloading in PDF format quarterly. To download these, right click on the below links and select 'Save Target As...'



Current Newsletter

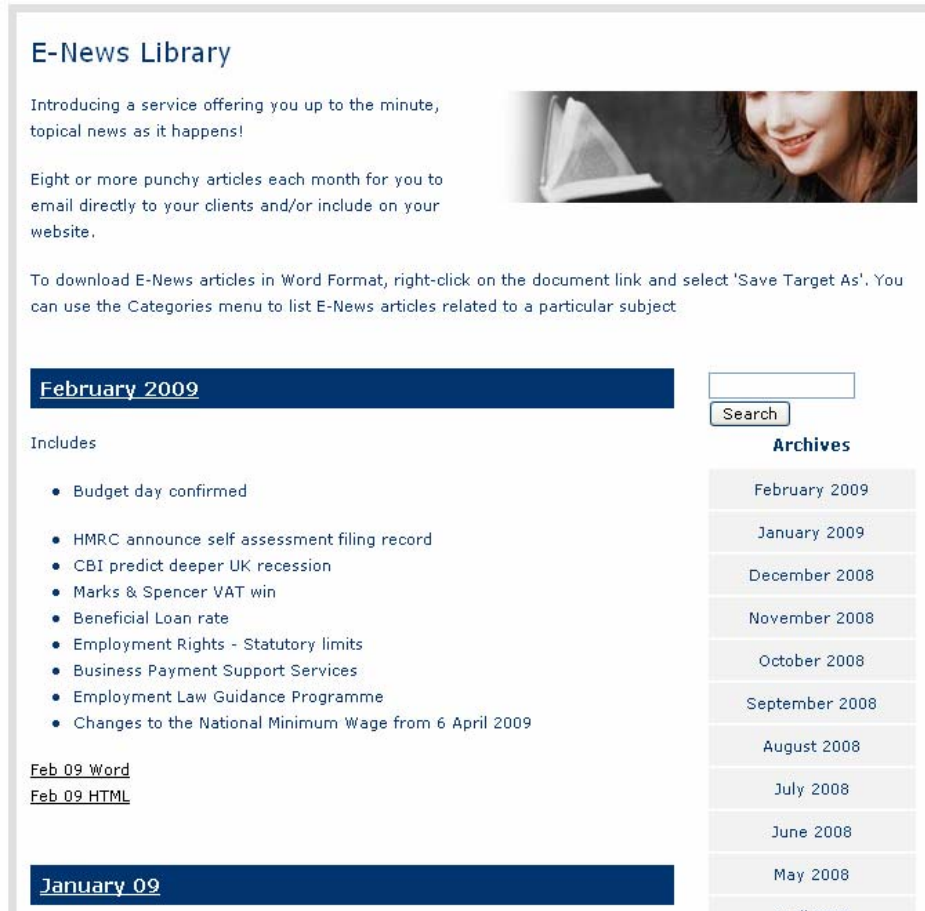
-  [Winter 2008 Download](#)

Previous Newsletters

-  [Autumn 2008 Download](#)
-  [Summer 2008 download](#)
-  [Spring 2008 download](#)
-  [Winter 2007 download](#)

16.4. eNEWS

1. Firstly, log onto the Mercia online website
2. Once logged on you can gain access to the individual subscriptions by using the links provided on the home page.
3. On the eNEWS page you can locate the issue that you want to view by using the navigation bar found down the right hand side of the page.



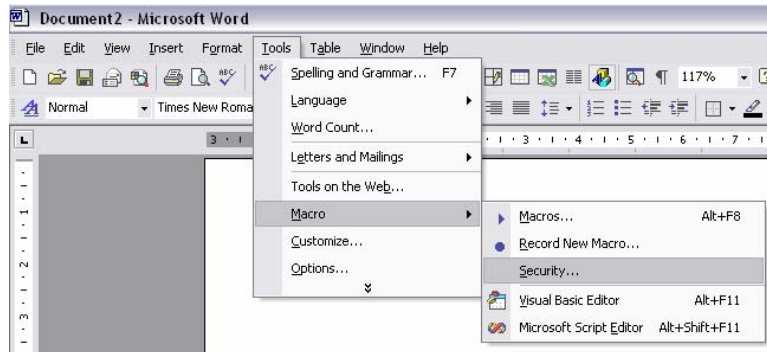
The screenshot shows the 'E-News Library' page. At the top left, there is a heading 'E-News Library' followed by a short introductory paragraph: 'Introducing a service offering you up to the minute, topical news as it happens!' and another paragraph: 'Eight or more punchy articles each month for you to email directly to your clients and/or include on your website.' To the right of this text is a photograph of a woman smiling while reading a book. Below the text, there is a paragraph explaining how to download articles in Word format and how to use the Categories menu. A dark blue navigation bar highlights 'February 2009'. Below this, there is a search box with a 'Search' button and an 'Archives' section with a list of months from February 2009 down to April 2008. A list of article topics is provided under the heading 'Includes', such as 'Budget day confirmed', 'HMRC announce self assessment filing record', and 'Changes to the National Minimum Wage from 6 April 2009'. At the bottom left, there are links for 'Feb 09 Word' and 'Feb 09 HTML'. A dark blue navigation bar at the bottom highlights 'January 09'.

4. Or you can use the search box to locate any articles containing the words you search for
5. Once you have located the issue you want, right click on it and select 'save target as'.

17. I have downloaded a manual and I am getting a Macro error in Word

If you experience an error message when you first enter the creator document informing you that "the Macros in this document are disabled...", this is due to a security setting not allowing the macro to run.

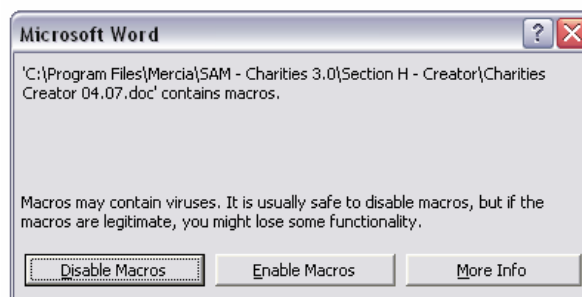
1. In Microsoft Word (versions 2000 to 2003) click on the tools tab in the top toolbar and choose Macro and scroll over to Security.



2. In the security window, select the Medium setting and click OK



3. Exit Word completely and double click on the creator document shortcut from your desktop again and when asked, enable macros



18. I have downloaded a manual and I am getting a Macro error in Word 2007

1. Firstly click on the Microsoft Office logo which can be found in the top left hand corner of the screen



2. Then click on Word Options at the bottom of the window (this could be Access options, PowerPoint options or Excel options depending on what Office application you're running).
3. Now click on Trust Centre settings.
4. From the left hand menu, choose Macro settings and then select from the right hand side list which security level meets your needs. In order to run all macros, select the last option in the list - "Enable all macros (not recommended; potentially dangerous code can run)".

