CEMES-Manual

Clients

IBS - CEMES Institut GmbH

CEMES-Manual – Clients

Content

Introduction

Dear user!

The manual describes the use of the module „Clients“ of the CEMES platform, a web-based application program on the basis of PHP scripts and MySQL data banks.

You can get to the login for that platform via ibs.cemes.eu.

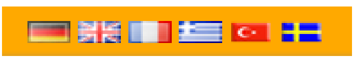
For a failure-free work with the CEMES platform it is indispensable that JavaScript as well as Cookies are activated in the browser since JavaScript was used, e.g. for writing different tool tips, the dynamic menus and the language control. Cookies permit the administration of sessions, which remember the user and make an administration of the platform possible.

Important information for using this platform is displayed in this document in a separately marked field.

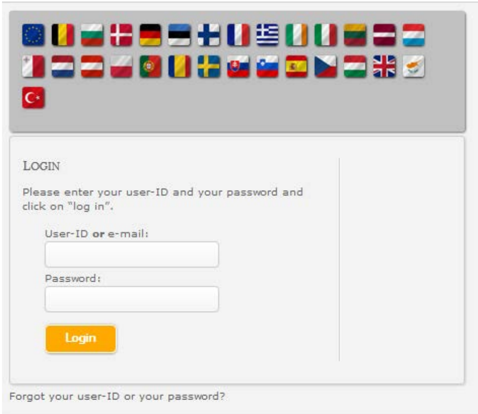
Preparation

Login

After entering the address of the platform in the browser's address line, the Welcome page opens in German language.

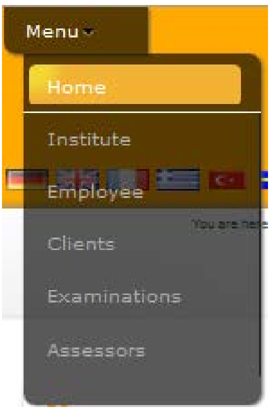
For switching into another language, click the button  in the upper part of the page, then the window opens in the respective language.

For logging in for the platform, first click the button „Login“ on the right side of the page.



In the mask open now, please enter your user ID or Email-address as well as the password given to you. Then click on Login. After having logged in, your name appears in the right column of the screen.

Selection of the menu



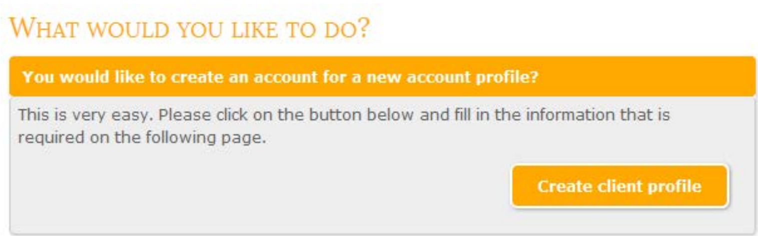
When you want to get to the module „Clients“, you have to select the menu point Clients in the upper part of the page first using the mouse.

After that, you see the start page for the administration of clients.

Administration of clients

Creating a new account

When you want to create a new account for a client, first click „You would like to create an account for a new account profile?“ and then „Create client profile“.



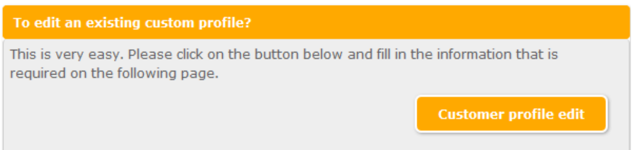
After clikcing „Create client profile“, you are shown a menu bar with „Status“, „Master data“ and „Examinations“. „Examinations“ is separately explained in this manual under „Allocate examination“. At first you have to possibility to change the status of the client between “active” and “inactive”.

Information: <u>NO</u> candidate can login at the institute when the status is „inactive“.

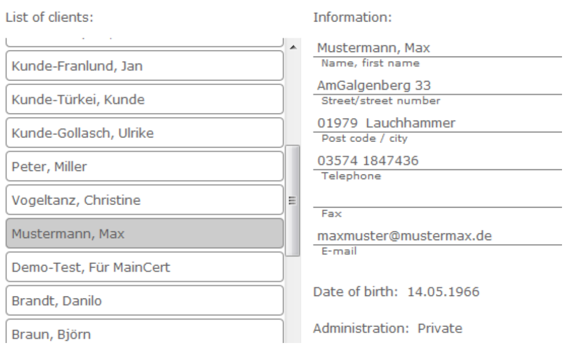
Then you click the button „Master data“. Here you entert he client’s master data, select the standard language as well as the client’s sex. The fields marked with * have to be filled in in any case. Only after filling in the data into these fields, the button „Save“ appears.
Please write down the login-ID and the password, if no email address was entered or automatic sending was not activated (selecting field appears only after entering your email). After that you select the type of administration. For business clients you can add separate company data.

Edit client profile

When editing an existing client profile, first click on „You would like to edit an existing client profile?“ and then on „Edit client profile“.



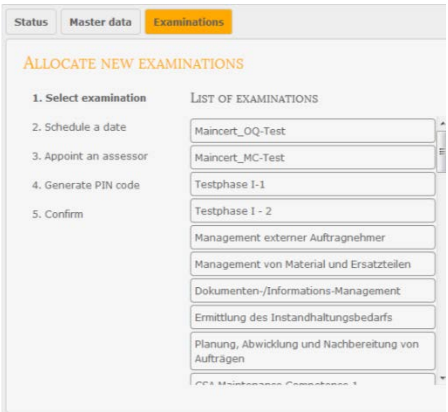
A list of the clients is shown with the respective data (when going over the button with the name of the client).



After selecting the client by clicking on the name button, the client's status is shown and can be changed. For editing the master data, click the button "Change". Then you can change the data or allocate a new password to the client by clicking "New password". Then you have to go to "Save changes" to finish editing.

Allocating an examination

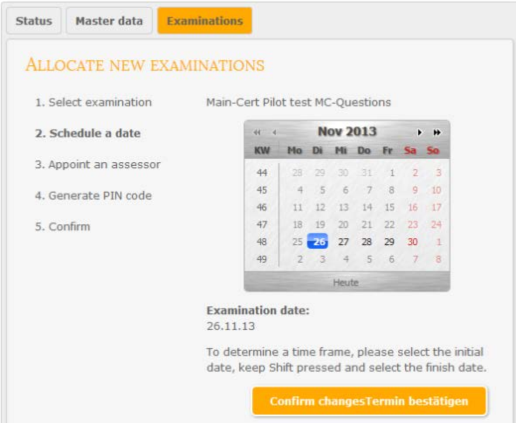
There are two possibilities for allocating an examination, the first directly after saving a new account, or the second vie editing a client.



In both cases to have to click Examinations in the client profile. A list appears in which you click the button „+". In a first step, an examination is selected from the list of existing examinations.

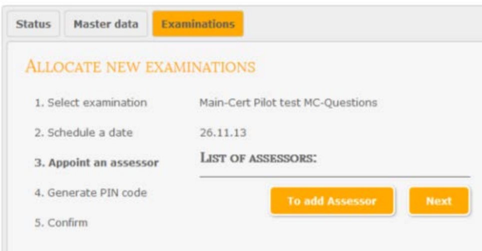
By clicking on the required examination you get to the next step.

In a second step. The date is fixed, i.e. the date of the examination or a period in which the exam can be taken.

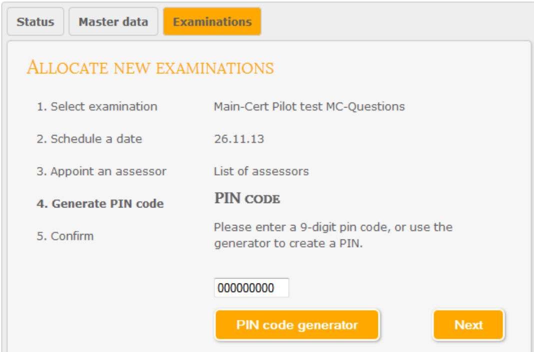


After fixing the date, click „Confirm date“ to finish that step.

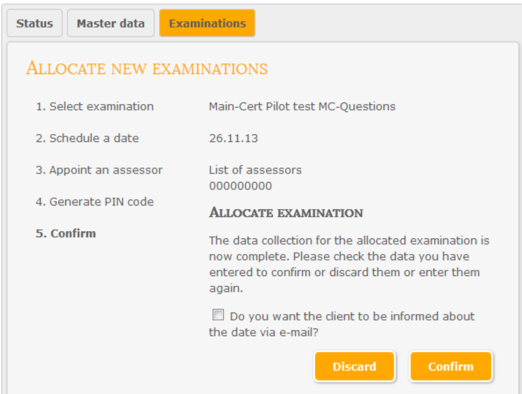
Now the assessors are appointed. For this go to “Add assessor”, then select one or several assessors in the new window and click



In the second last step, the 9-digit pin code for the examination is fixed. This safety code is asked for before the examination can start.



You can either enter a code yourself or use the pin code generator to get a code generated. Then click “Next”.



The last step is to check the entered data. They can now be confirmed to allocate the examination or be discarded to enter new data.

Final remarks

Thank you for reading this manual and much success in the administration of clients.