



PACE PLUS MANUAL HEALTHY WORKING

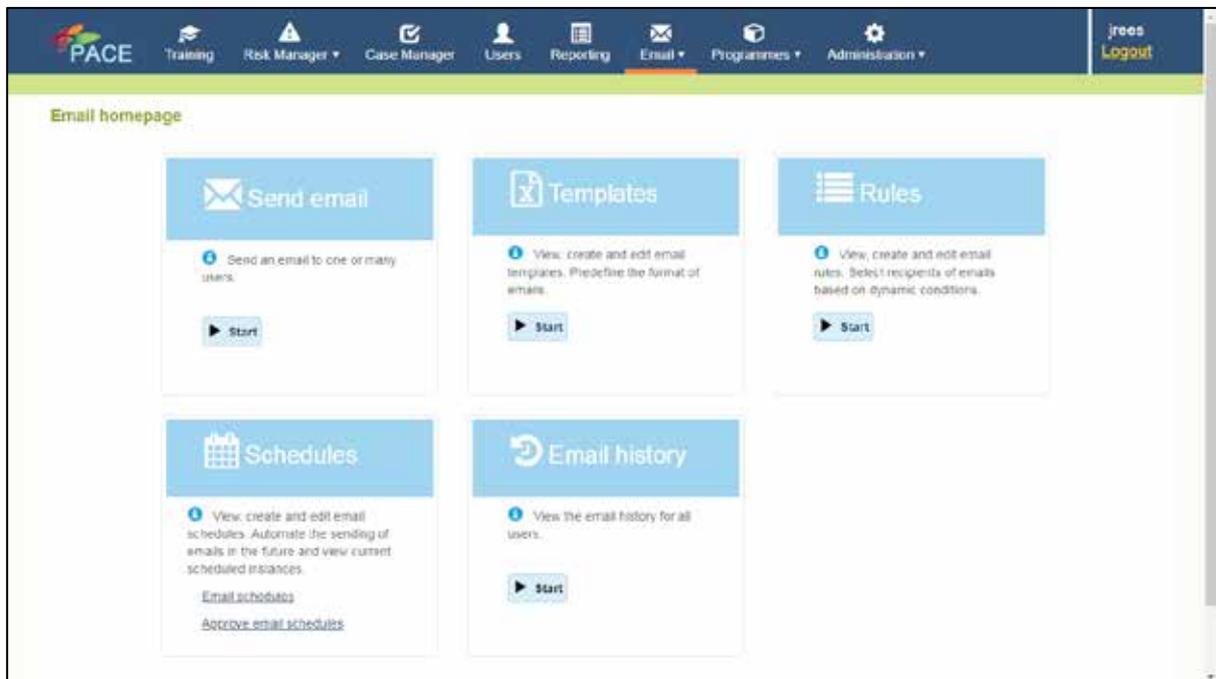
VERSION 1.2



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1.0 Emails



The Email module of PACE covers five key areas.

Send Email enables you to send an ad hoc email to one or more users.

Templates allow you to view, create and edit email templates to cover all eventualities.

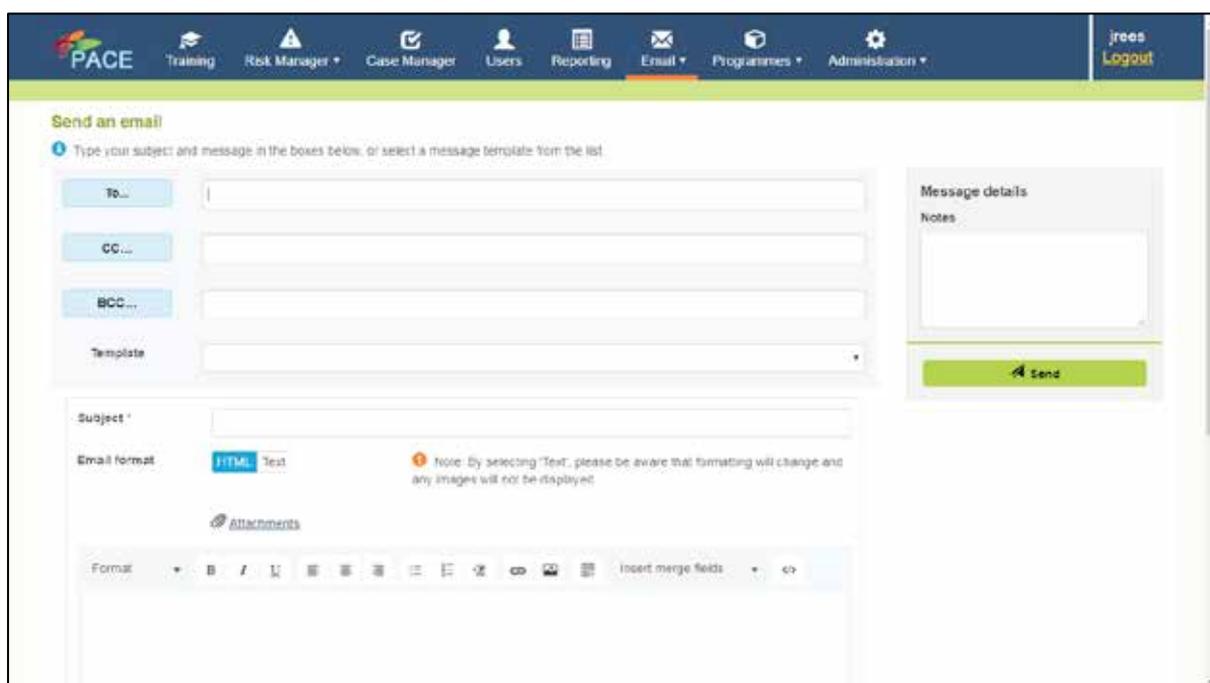
Rules and **Schedules** are the mechanisms for automating emails, specifying that an email (using one of your email Templates) be sent to users who meet whatever criteria meets your business need (defined in the Rule) on whatever Schedule you care to define.

Finally, **Email History** allows you to see what emails have been sent through to PACE to specified Users, thereby giving you a comprehensive audit trail of their activities (or lack of activity) on your Programmes.

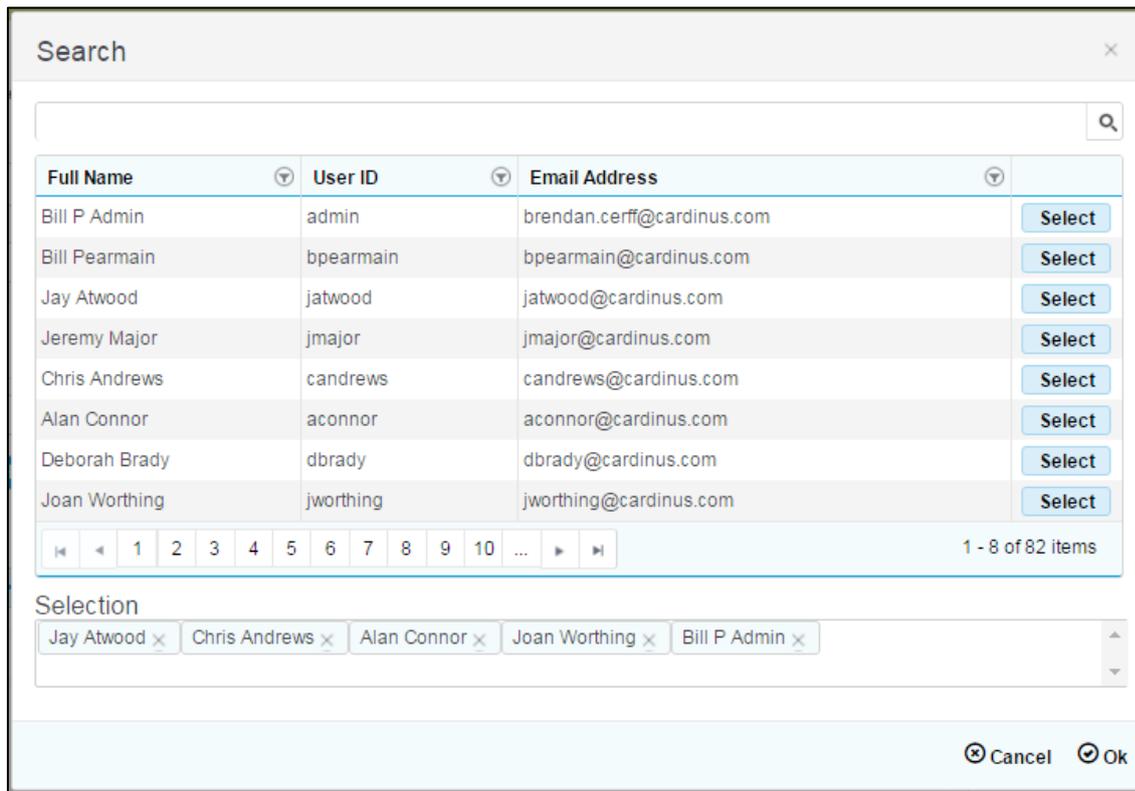
1.1 Sending Emails

PACE comes with a powerful email engine that gives administrators a large degree of control over the look and feel (in addition to the content) of the messages they send. You can send emails to any PACE users to whom you have access (i.e. those users within your area of control).

The interface for sending emails will be familiar to most computer users as it strongly resembles most of the email applications in common use. Your steps to send an email in PACE are therefore (mostly) the same as you would follow to send an email through Outlook, Thunderbird, Gmail or any other email program.



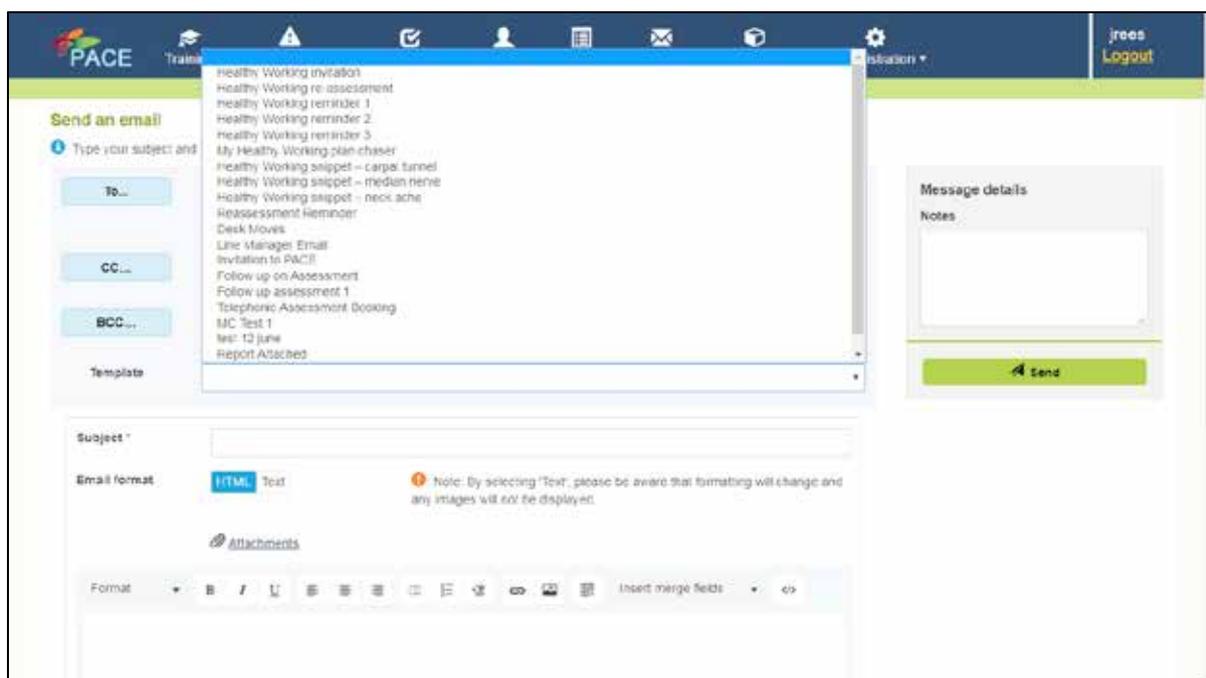
1.1.1 Select your recipients



You can select your recipient(s) in one of two ways. Firstly, you can click the **To...** button to choose one or more PACE users. Your search criteria may well produce multiple results – you can use the **Select** buttons to choose as many users as you wish to be recipients of your email.

Click **OK** when your choices are complete.

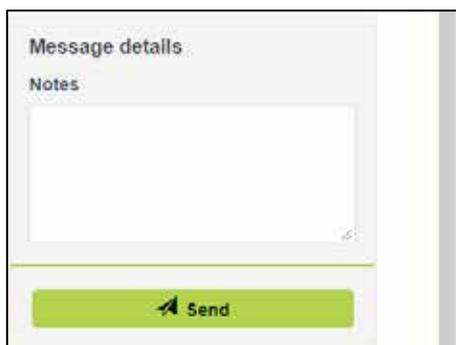
1.1.2 Select your template (optional)



Whilst you can write your email from scratch, there will often be an existing email template which can spare you all that extra typing. The **Templates** drop-down list includes all the templates to which you have access, all you have to do is select it from the list.

Even if you are using a template, you still have the option to amend the wording before you send your email. Email templates are covered in more depth in Section 1.2 of this document.

1.1.3 Add notes to the message (optional)



The **Message details** box gives you the ability to write notes about the email you have sent. This will be displayed in the email details in the email history for that user.

1.1.4 Provide a Subject line



Give your email a **Subject** line. This will pre-populate if you're using a template.

1.1.5 Choose your email format

You can send your email as plain **Text** or **HTML**. If you choose **Text**, you will see that the toolbar above the text editor for the message body disappears.



The only formatting that a **Text** email will retain is line breaks.

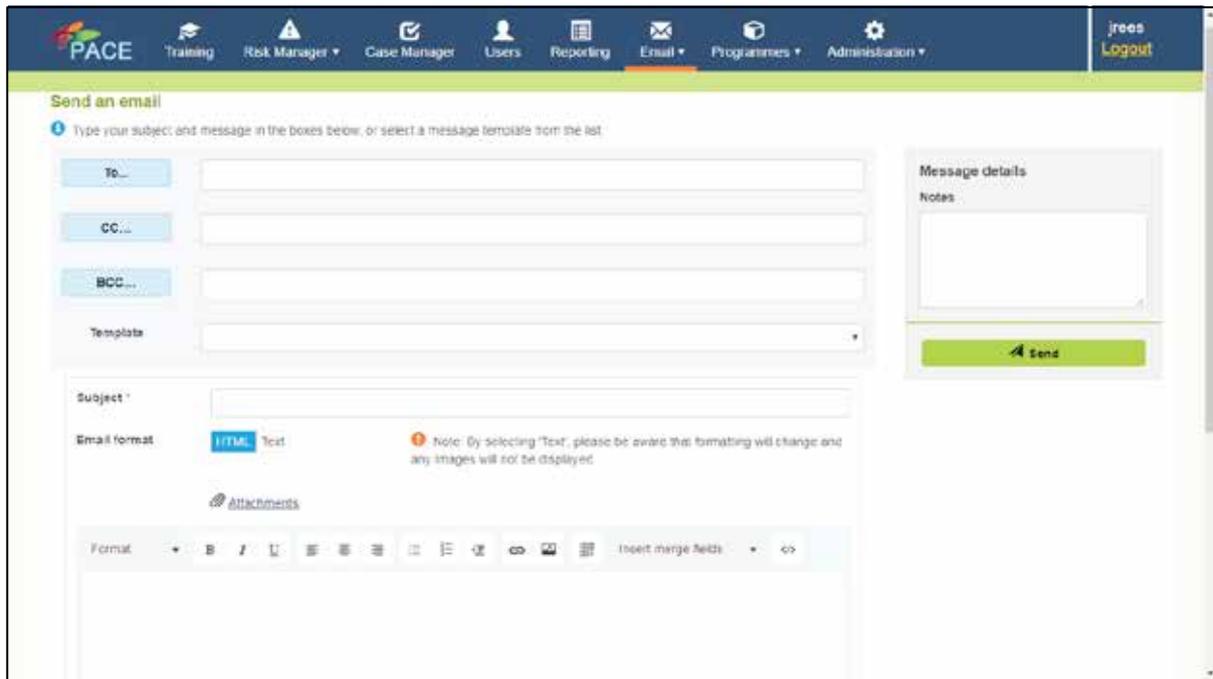
HTML emails not only allow you to use **bold**, *italic* or underlined text, but also to add images, lists and other formatting. HTML is the default option; you should only use **Text** emails if your email system blocks HTML emails.

NOTE - Section 1.1.7 of this document describes the text editor in more detail, but please be aware that if you select “Text” as your email format you will be unable to insert merge afields into your email.

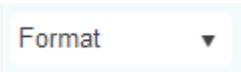
1.1.6 Add attachments (optional)

Use the **Attachments** button to select any files that you want attaching to your emails.

1.1.7 Write the message content (for HTML emails)



The full-featured text editor allows you to create your email exactly as you want it to appear. The text editor can be found at the bottom of the screen and is topped with a toolbar that provides a range of formatting options.

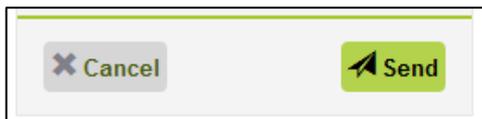
Option	Effect
	Allows you to format text as either “Paragraph” (ie. standard text content), “Quotation” (surrounding the text with Quote formatting) or a Heading (there are 6 headings of descending size – Heading 1 the largest, Heading 2 the smallest)
	Format the text as Bold <i>Italic</i> or <u>Underlined</u>
	All the text to the Left, Centre or Right
	Insert a list of bullet points or a numbered list
	Indent the text to the right
	Insert a functioning hyperlink
	Insert an Image
	Insert a Table



Insert a placeholder that will be populated with data relevant to the recipient when the email is sent (ie. recipient's name, email address or test score etc.)

View HTML – this opens a pop-up window which shows you the raw HTML generated to display your email (advanced users only)

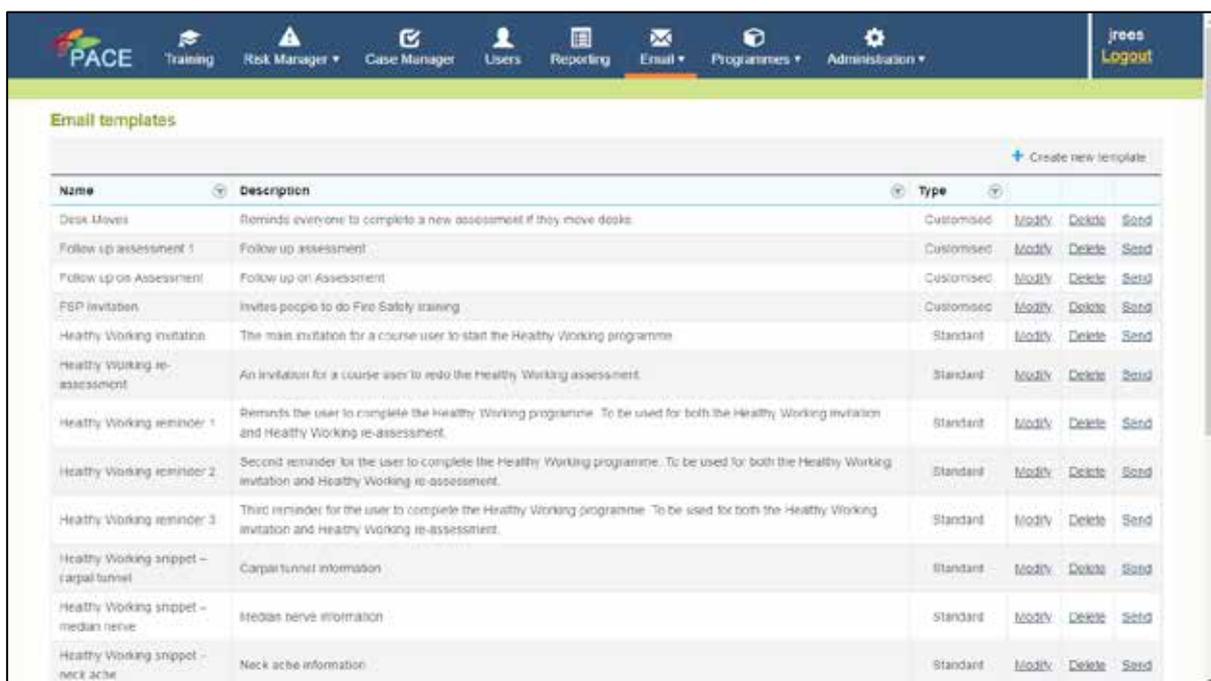
1.1.8 Send the email



Click **Send** to send your email.

1.2 Templates

Email Templates are a great time-saving feature of PACE that allows you to create a dynamic email which automatically updates with data relevant to the person receiving the email. Your system will come ready-configured with a set of email templates which you are able to modify according to your need, and you have the ability to create whatever additional templates you may require.

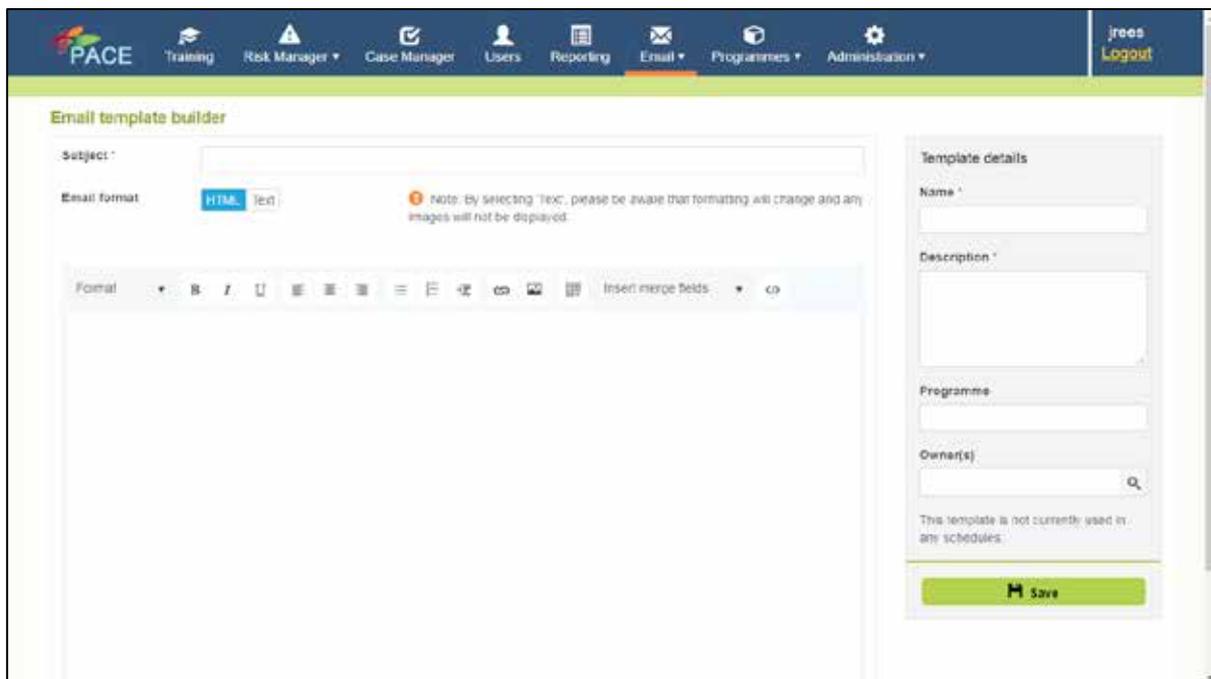


Selecting **Email – Email templates** brings you to the standard **Email templates** screen show opposite. This lists all the templates to which you have access (as you will see below, some templates are only available to a limited number of users), and it gives you links or buttons to perform one of the four actions relevant to email templates.

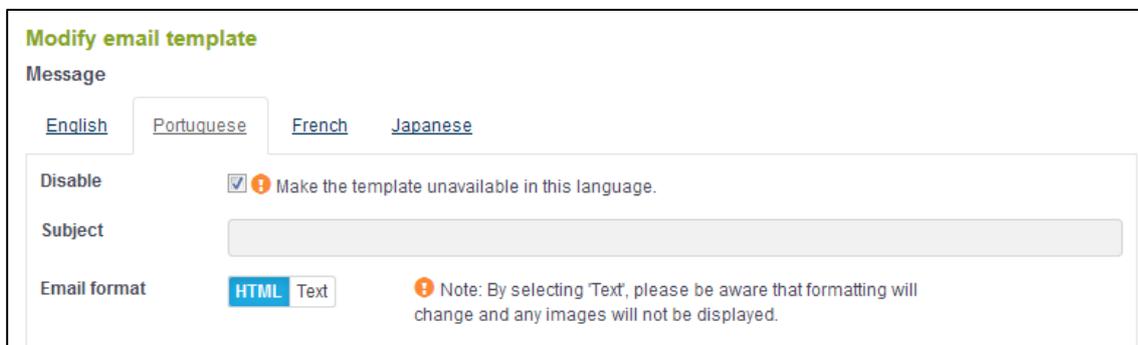
From here you can:

- **Create new templates**
- [Modify](#) existing templates
- [Delete](#) existing templates
- [Send](#) an existing template to specified users

1.2.1 Creating new templates

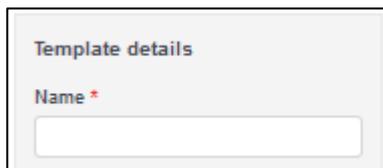


The **Email template builder** (accessed by clicking *Create new template* from the **Email templates** screen) gives you complete control over all elements of your new template. The body of the email is written using the text editor which we have already seen in section 1.1.7 of this document.



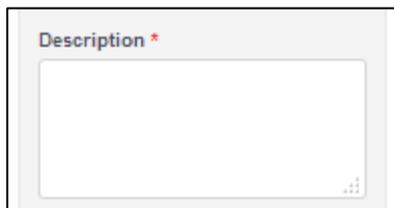
You will start by creating your template in the default language of your system (English in the example opposite), but you have the option of providing translations into whatever other languages your users need. Use the language links at the top of the page to switch between languages. You can also use the **Disable** option to specify that your template is not to be made available in that particular language (the template in the example above will not be available in Portuguese).

Once again you have the choice of **HTML** or **Text** emails, and you can insert a wide range of merge fields to your text to make the email truly dynamic. When you create a template, you will need to provide additional information using the grey section on the right of the screen.



The screenshot shows a form titled "Template details" with a single text input field labeled "Name *".

You must provide a **Name** for your template. This is displayed wherever there is a list of templates. Your name must be unique (the system will not allow you to use the same name as an existing template) and should ideally be descriptive enough to make the purpose of the template immediately obvious.



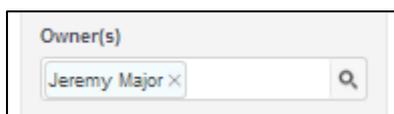
The screenshot shows a form with a large text area labeled "Description *".

You must also provide a **Description**. This should be a comprehensive explanation of the purpose of the template describing the intended recipients and a summary of the contents of the template. Giving your template a good **Name** and a clear **Description** helps all administrators and will save you time in the future (you should not need to open the template to determine if it's what you need).



The screenshot shows a form with a dropdown menu labeled "Programme".

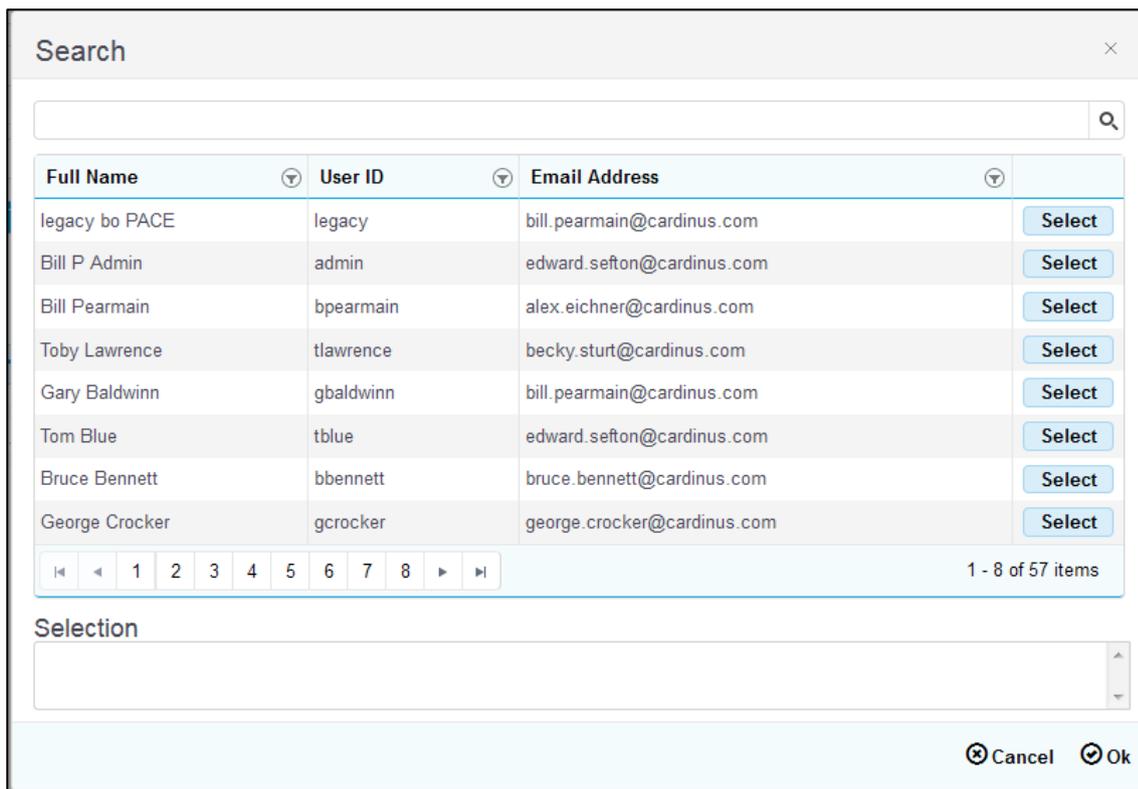
Programme is an optional field and is only really applicable if you have more than one Programme set up in PACE. Selecting one or more Programmes in this field limits your template to use in relation to those Programmes.



The screenshot shows a form with a dropdown menu labeled "Owner(s)" containing the name "Jeremy Major" and a search icon.

Some users are limited to only viewing and using email templates which they "own". Selecting those users as the **Owner** (you can have more than one Owner) will make the template visible to them.

If you do not select any Owners, the template is only visible to users whose permissions allow them to view and access templates which they do not own.



The process for selecting users is the same for **Owners**. Click the **Send** button on the right-hand side of the template to open the **Select users** dialog box. You can filter the list of users with the search box at the top of the screen.

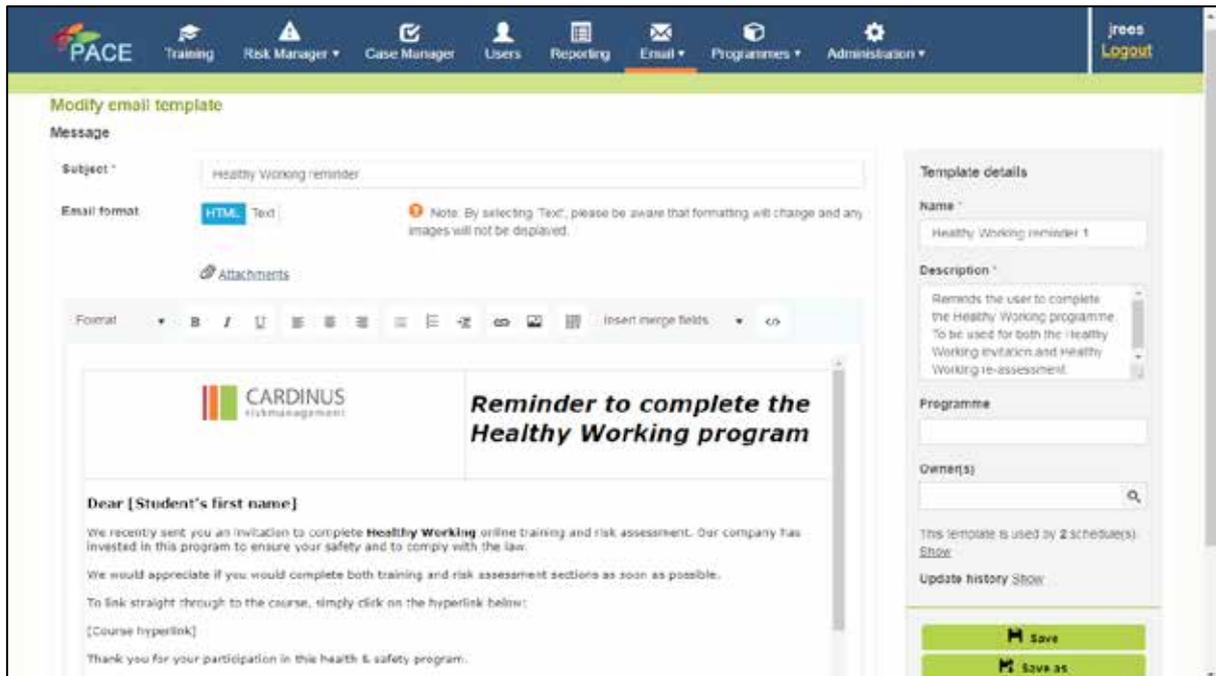
Click **Select** next to all the users you want and click **OK** to confirm.

NOTE - The terms “view”, “use” and “access” in this context means working with the templates in the Email templates section of PACE. It does not affect whether a user could be the recipient of an email using the template – all users could be sent an email using any template.



When you have finished creating your template, click **Save**.

1.2.2 Modifying existing templates



The process for modifying a template uses essentially the same screen and options as we saw when creating a new template. You have the option to see which email schedules use the template. Click **Show** to see which schedules use the template. You can also view the **Update history** of the template. Click Show to see:

- Who created the template
- When the template was created
- Who last modified the template
- When the template was last modified

You can also use “Modify” to create a new template based on the template you “modified”. After you have made your changes, you can select **Save as** to create a new template with a new name.

1.2.3 Sending and deleting templates

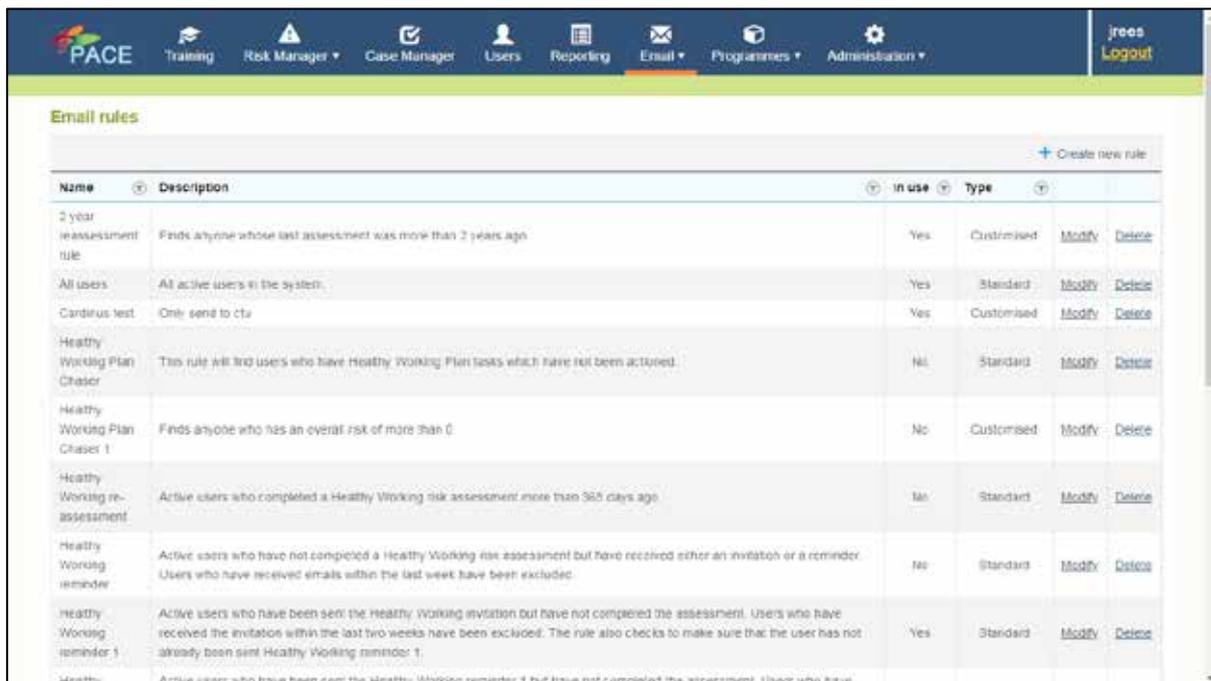
Clicking [Send](#) next to an email template on the main templates page will open the standard **Send email** screen with your chosen template already selected. The process for amending and / or sending the email is exactly as described in section 1.1 of this document.

If you have sufficient rights in the system, you may also see a link to [Delete](#) a template. The system will not allow you to delete an email template that is linked to a schedule. If you are absolutely sure

you want to delete a template, you will need to make sure you remove it from any schedules before doing so.

1.3 Rules

PACE has the ability to send emails automatically to specific users based on defined criteria. Rules, together with Schedules, are what define that criterion. Email rules determine which users are to be included in the automatic emails; email schedules determine when those emails will be sent and also specify the content (ie. the template to be used) for those emails. Schedules are discussed in depth in section 1.4 of this document.



Select **Email – Email Rules** to access the **Email rules** home page. This lists all the rules to which you have access and provides links or buttons to perform one of three actions in relation to email rules:

- **Create new rule**
- [Modify](#) existing rule
- [Delete](#) existing rule

1.3.1 Creating email rules

An email rule is a set of “conditions” which must be true for a user to be the recipient of the email. This is perhaps best understood by looking at some of the rules which are present by default in your system:

Rule Name	Conditions
All users	Selects all users with a status of “active”
Healthy Working Plan Chaser	This rule will find users who have Healthy Working Plan tasks which have not been actioned.

New Starter email	Finds anyone who has not received emails and who has not completed the assessment
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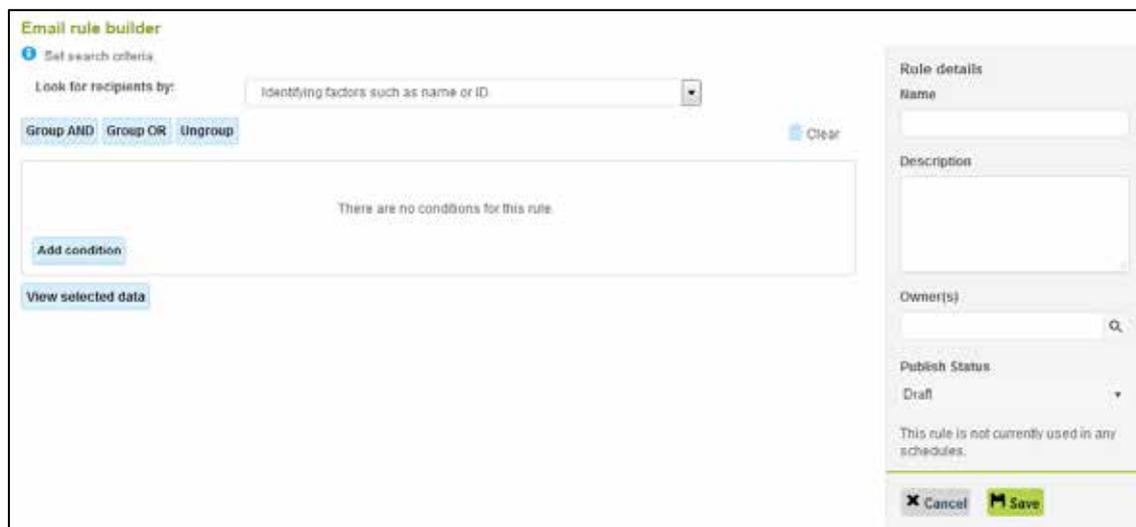
1.3.1.1 Define your conditions

This first step can be completed without even logging in to PACE. Think carefully about the conditions that you need to apply to achieve what you want from your rule. Write it down in “plain language” such as:

- Name: Second Reminder
- Conditions: Users qualify for this email if:
- They are registered for the Healthy Working DSE course
 - They have not completed either their training OR their risk assessment
 - They were sent the First Reminder email at least 2 weeks ago

When you are clear about how your rule will work, you are ready to start building it. Click **Create new rule** at the top of the Rules list.

1.3.1.2 Set your rule details



The grey column on the right of the screen is used to contain key details of your rule. Start by giving it a descriptive **Name** – keep it short, but make sure that its purpose is clear. Use **Description** to provide even more detail – specify how it works.

Owners allows you to make the rule available for other administrators. We have already seen the same functionality in relation to Email Templates, and you will see it again in relation to Email Schedules.

1.3.1.3 Building the conditions

Email rules consist of one or more conditions to which AND / OR logic is applied. “AND” logic applies where you have conditions which must all be true for the rule to apply, whereas “OR” logic applies the

rule if any of the specified conditions are true. The Email rule builder allows you to build complex rules which combine “AND” conditions with “OR” conditions in whatever combination you might need. Let’s look at some examples to see how this might work in practice:

- All Active Users added to the system this year

The rule applies to all users who have a status of “Active” and who have been added to the system this year. The conditions are therefore:

AND User Status Equals Active
 AND Date Added to System On Or After 1/1/[this year]

- Users Added to the system this month, or who have never been invited to complete a course

In this case, the rule would apply if a User was added this month, OR if they have never been sent the email inviting them to complete a course:

OR Date Added to System On Or After 1/[this month]/[this year]
 OR User has not been sent [TEMPLATE]

- Users Added to this system this month, or users who been sent the invitation email this month who have not yet completed their risk assessment

In this case, we combine AND conditions with OR conditions:

OR Date Added to System On Or After 1/[this month]/[this year]
 OR User Sent [Template] On Or After 1/[this month]/[this year]

AND Risk Assessment Status Does Not Equal Completed



Start by selecting the most appropriate option in “**Look for recipient by**”. Choose the option that best describes the conditions you want to apply. Click **Add condition** to create each condition line. The options will depend on the type of data your condition uses.



Each condition consists of three pieces. The first section, on the left, is where you select the data to which your condition applies. In the example above, this is “*User’s first name*”. The second – middle – section evaluates that data in some way. The exact options vary on the type of data selected in the first column (date fields have a different set of evaluators than text or numerical fields). In the final column, you select the value which is to be compared against your data. The example above would apply where the user’s first name begins with a “C”.

Look for recipients by: Identifying factors such as name or ID.

AND

User’s first name
Starts with
C

User’s last name
Contains
e

<input type="checkbox"/>	First name	Last name	Email	Location	Department	User ID
<input checked="" type="checkbox"/>	Chris	Andrews				candrews

15 items per page.
 Items 1 to 1 of 1

When you have your full list of conditions in place, your rule will look something like that above. In this example, the rule will select users with a first name beginning with a “C” whose last name contains an “E”. We have clicked **View selected data** and can see this rule picks up “Chris Andrews”.

If you use the **View selected data** button and you note that the rule has picked up one or more users whom you would prefer it didn’t pick up, check the box to the left of the users’ first names and click **Exclude Selected Recipients**. This will automatically add “AND” conditions that expressly eliminate your selected users.

1.3.1.4 Complex conditions

Look for recipients by: Identifying factors such as name or ID.

OR

User's first name
Starts with
C

AND

User's last name
Contains
e

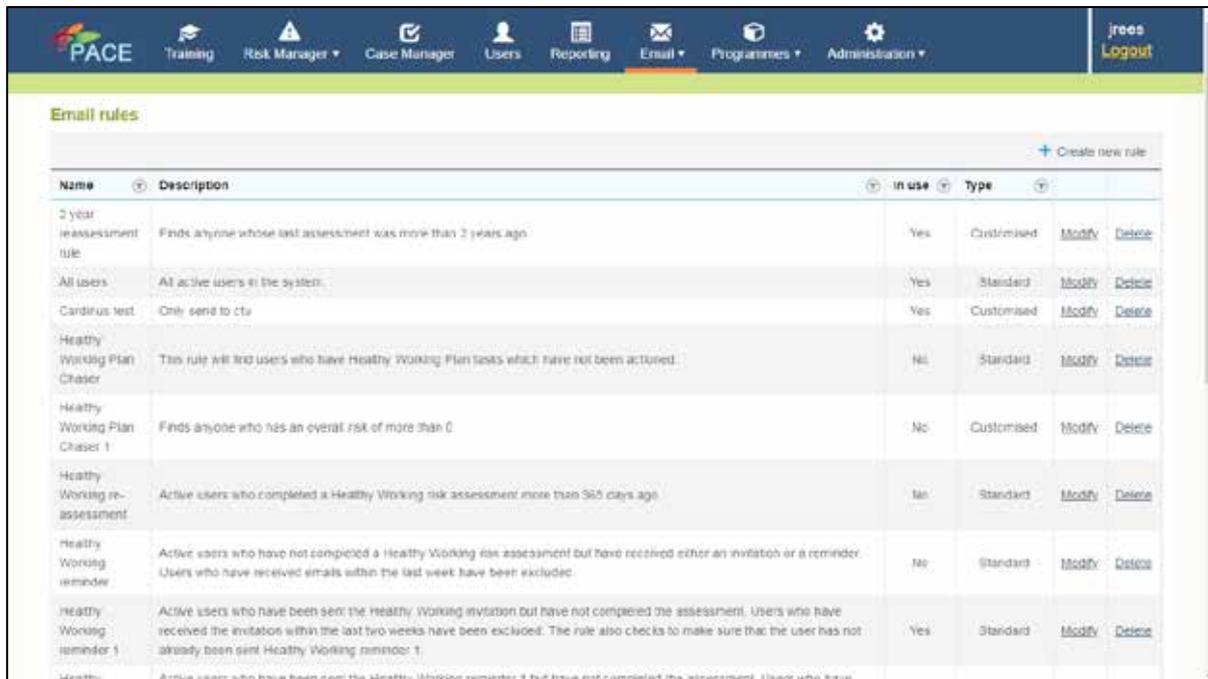
Date the user was
Occurs before
01/08/2015

<input type="checkbox"/>	First name	Last name	Email	Location	Department	User ID
<input type="checkbox"/>	William	Pearmain				bpearmain
<input type="checkbox"/>	Chris	Andrews				candrews
<input type="checkbox"/>	Annie	Masters				amasters

So far we have used simple “AND only” rules. The example above shows a slightly more complex rule which selects both users whose first name begins with “C” AND those whose surname contains an “E” and who were added to the system on or before 1st August 2015. The three conditions were added as described above in section 1.3.1.3.

Once you have added all the conditions, you use the check boxes to the left of each condition and the **Group AND** and **GROUP OR** buttons to combine the selected rules.

1.3.2 Modifying and Deleting existing rules



Name	Description	In use	Type	
3 year re-assessment rule	Finds anyone whose last assessment was more than 3 years ago	Yes	Customised	Modify Delete
All users	All active users in the system	Yes	Standard	Modify Delete
Cardius test	Only send to cta	Yes	Customised	Modify Delete
Healthy Working Plan Chaser	This rule will find users who have Healthy Working Plan tasks which have not been acted.	No	Standard	Modify Delete
Healthy Working Plan Chaser 1	Finds anyone who has an overall risk of more than 0	No	Customised	Modify Delete
Healthy Working re-assessment	Active users who completed a Healthy Working risk assessment more than 365 days ago	No	Standard	Modify Delete
Healthy Working reminder	Active users who have not completed a Healthy Working risk assessment but have received either an invitation or a reminder. Users who have received emails within the last week have been excluded.	No	Standard	Modify Delete
Healthy Working reminder 1	Active users who have been sent the healthy Working invitation but have not completed the assessment. Users who have received the invitation within the last two weeks have been excluded. The rule also checks to make sure that the user has not already been sent Healthy Working reminder 1.	Yes	Standard	Modify Delete
Healthy Working reminder 2	Active users who have been sent the Healthy Working reminder 1 but have not completed the assessment. Users who have			

The Email rules menu lists all email rules of which you are the **Owner**. As noted above, you can only **Modify** or **Delete** rules for which you are one of the Owners. Assuming you are one of the Owners, use the links in the right-hand columns to do just that.

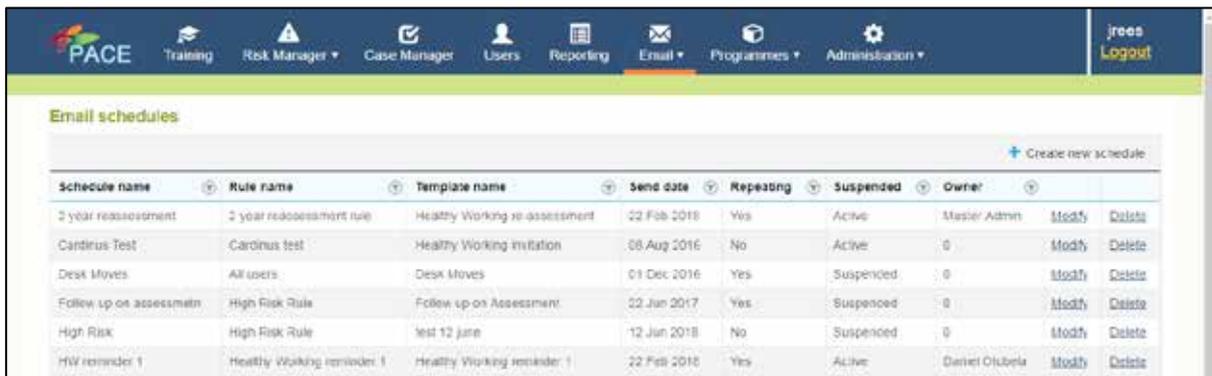
Modifying rules takes you to the Email rule builder seen in section 1.3.1 of this document. Make whatever changes you need in the same way that you build new rules from scratch.

Use **Delete** with great care.

1.4 Scheduling

Email Schedules combine Email rules and Email templates so that emails can be sent automatically to users.

As noted in sections 1.2 and 1.3 of this document, the Email rule determines to whom the email is sent, and the Email template specifies the content of the email that is sent. The schedule specifies the rule and template to be used, and controls when and how often the emails should be sent.

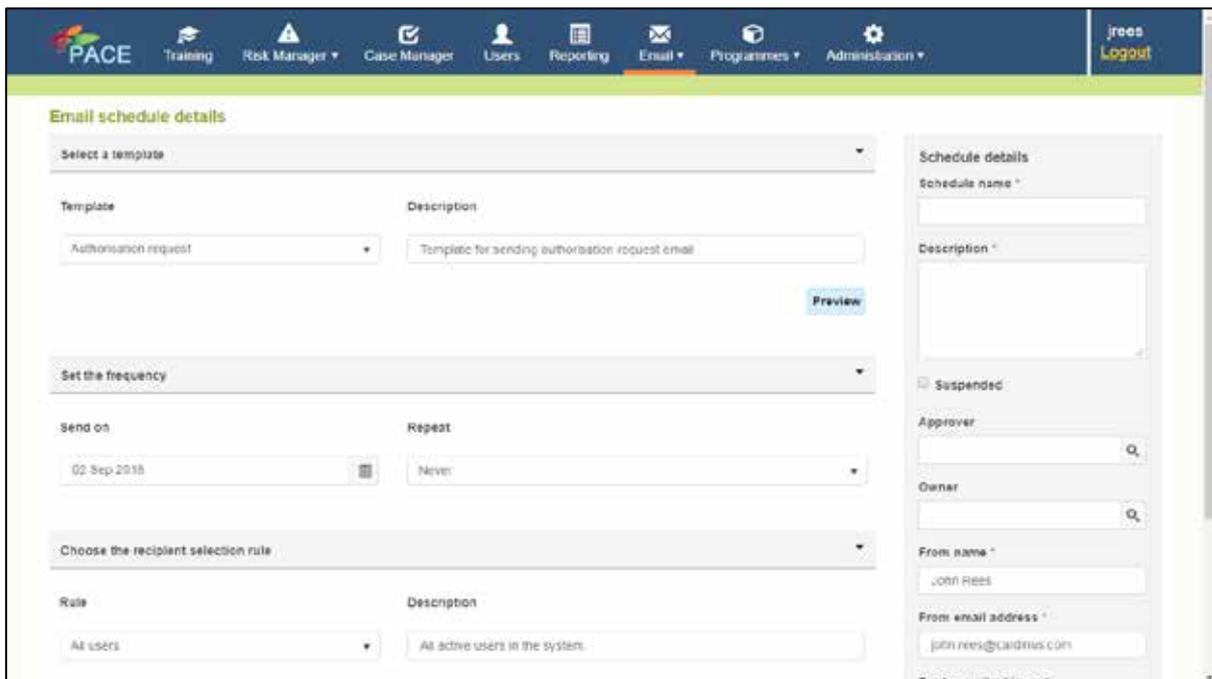


Schedule name	Rule name	Template name	Send date	Repeating	Suspended	Owner		
2 year reassessment	2 year reassessment rule	Healthy Working re-assessment	22 Feb 2018	Yes	Active	Master Admin	Modify	Delete
Cardinus Test	Cardinus test	Healthy Working invitation	08 Aug 2016	No	Active	0	Modify	Delete
Desk Moves	All users	Desk Moves	01 Dec 2016	Yes	Suspended	0	Modify	Delete
Follow up on assessment	High Risk Rule	Follow up on Assessment	22 Jun 2017	Yes	Suspended	0	Modify	Delete
High Risk	High Risk Rule	test 12 June	12 Jun 2018	No	Suspended	0	Modify	Delete
HW reminder 1	Healthy Working reminder 1	Healthy Working reminder 1	22 Feb 2016	Yes	Active	Daniel Okubela	Modify	Delete

You can access Email schedules directly from the main email menu.

1.4.1 Creating new email schedules

Click **Create new schedule** from the Email schedules menu to set up a new schedule.



Email schedule details

Select a template

Template	Description
Authorisation request	Template for sending authorisation request email

Preview

Set the frequency

Send on: 02 Sep 2018

Repeat: Never

Choose the recipient selection rule

Rule	Description
All users	All active users in the system

Schedule details

Schedule name *

Description *

Suspended

Approver

Owner

From name *

From email address *

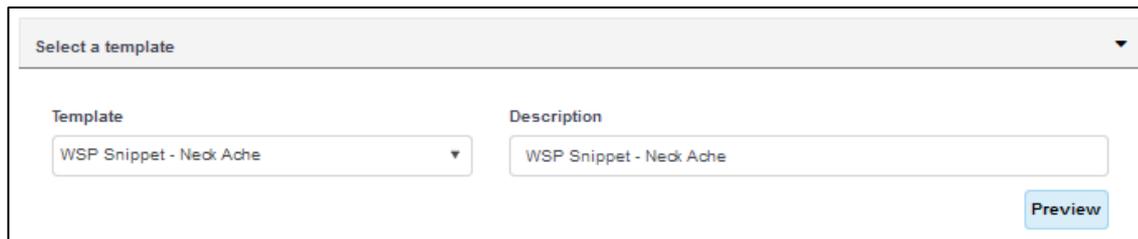
Reply email address *

Give your schedule a **Name** – this should be short but descriptive. Use the **Description** box to specify exactly what the schedule is for and when it should be used. Check the **Suspended** box if you don't want your schedule to have immediate effect.

Owners allows you to make the schedule available for other administrators. We have already seen the same functionality in relation to Email templates and Email rules.

The content of your schedule is set in the three sections on the right of the screen.

1.4.1.1 Set a template



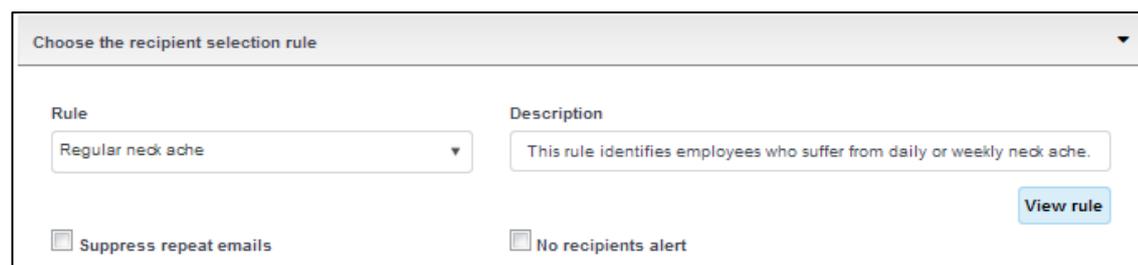
Select your **Template**. The **Description** should pull through automatically. Use **Preview** to review the template.

1.4.1.2 Set the frequency



Select the date the schedule starts using the **Send on** field. Select your **Frequency** from the available options.

1.4.1.3 Choose the recipient selection rule



Select your **Rule**. If you don't want users to be picked up by the schedule more than once, check the **Suppress repeat emails** box.

Sometimes, a schedule runs and finds that the rule picks up no users (or no new users if **Suppress repeat emails** has been selected). By default, the system will simply move to the next run date and take no further action. If you want to receive an email confirming that the schedule ran but picked up no applicable users, check **No recipients alert**. Both boxes are unchecked by default.

With your recipient selection rule chosen, your schedule is completed and can be saved. The schedule will begin to operate on the date specified as **Send on** provided the **Suspended** box is not checked.

NOTE - A special process checks at pre-configured intervals if there are schedules due to run today. Setting your new schedule to start today will not cause the emails to run immediately – it is generally advised to wait at least an hour before checking if your schedule has been properly executed.

When your schedule is due to run and it does find at least one applicable recipient, the system will email the schedule Owner asking for approval before the email is delivered. Once that email has been received the email will be in the list of emails waiting for approval in PACE. Automated emails are sent at regular intervals throughout the day – it may take up to an hour after you approve the schedule run before the emails are sent to users.

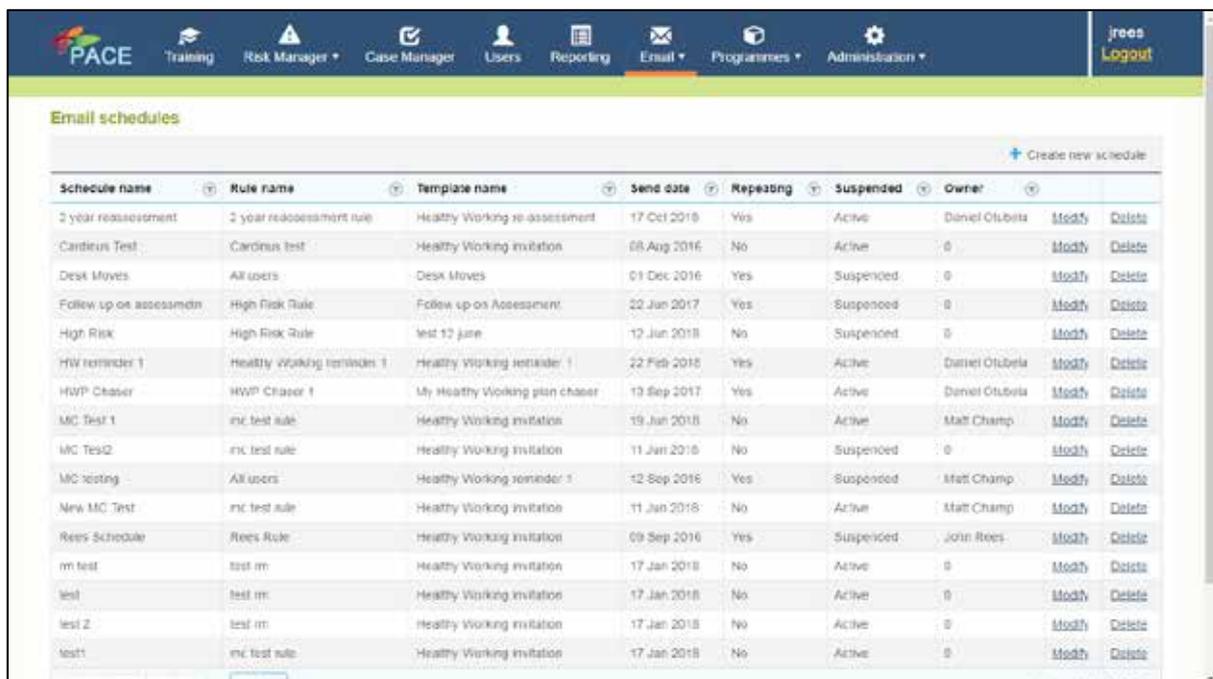
1.4.2 Modifying and deleting schedules

The Email schedules menu lists all schedules of which you are the **Owner**. As noted above, you can only **Modify** or **Delete** schedules for which you are one of the Owners. Assuming you are one of the Owners, use the links in the right-hand columns to do just that.

Modifying schedules takes you to the Email schedule builder seen in section 1.4.1 of this document. Make whatever changes you need in the same way that you build new schedules from scratch.

1.4.3 Monitoring schedules

Use the Email schedules list to monitor your schedules.



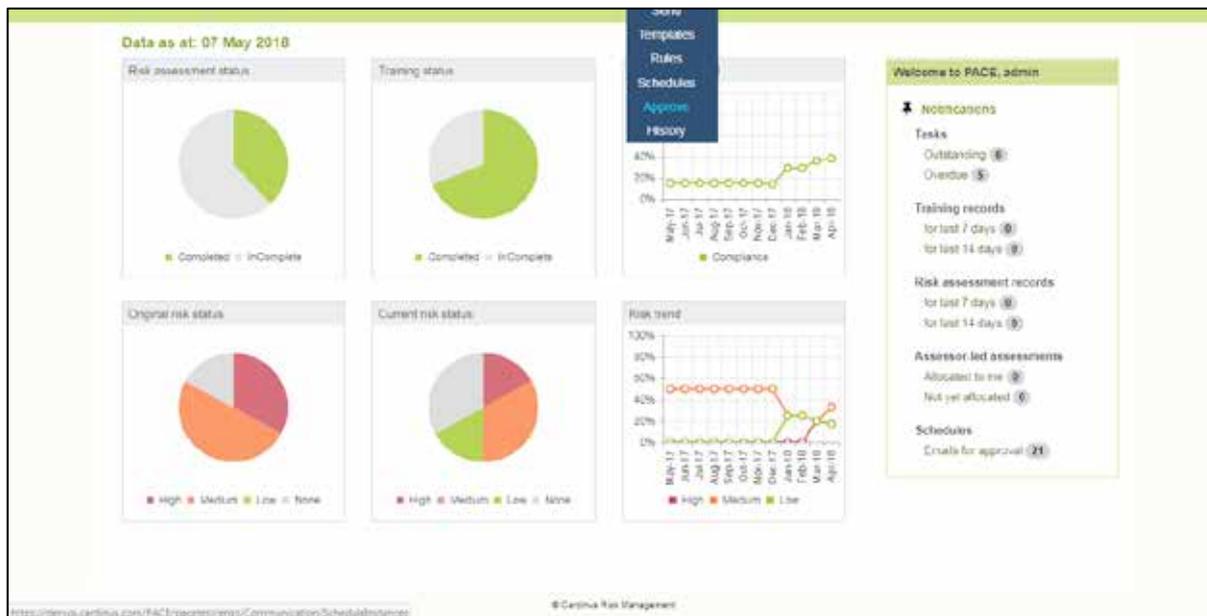
Schedule name	Rule name	Template name	Send date	Repeating	Suspended	Owner		
2 year reassessment	2 year reassessment rule	Healthy Working re-assessment	17 Oct 2018	Yes	Active	Daniel Otubola	Modify	Delete
Cardius Test	Cardius test	Healthy Working invitation	08 Aug 2016	No	Active	0	Modify	Delete
Desk Moves	All users	Desk Moves	01 Dec 2016	Yes	Suspended	0	Modify	Delete
Follow up on assessment	High Risk Rule	Follow up on Assessment	22 Jun 2017	Yes	Suspended	0	Modify	Delete
High Risk	High Risk Rule	test 12 June	12 Jun 2018	No	Suspended	0	Modify	Delete
HW reminder 1	Healthy Working reminder 1	Healthy Working reminder 1	22 Feb 2016	Yes	Active	Daniel Otubola	Modify	Delete
HWP Chaser	HWP Chaser 1	My Healthy Working plan chaser	13 Sep 2017	Yes	Active	Daniel Otubola	Modify	Delete
MC Test 1	mc test rule	Healthy Working invitation	19 Jun 2018	No	Active	Matt Champ	Modify	Delete
MC Test2	mc test rule	Healthy Working invitation	11 Jan 2018	No	Suspended	0	Modify	Delete
MC testing	All users	Healthy Working reminder 1	12 Sep 2016	Yes	Suspended	Matt Champ	Modify	Delete
New MC Test	mc test rule	Healthy Working invitation	11 Jan 2018	No	Active	Matt Champ	Modify	Delete
Rees Schedule	Rees Rule	Healthy Working invitation	09 Sep 2016	Yes	Suspended	John Rees	Modify	Delete
m test	test m	Healthy Working invitation	17 Jan 2018	No	Active	0	Modify	Delete
test	test m	Healthy Working invitation	17 Jan 2018	No	Active	0	Modify	Delete
test 2	test m	Healthy Working invitation	17 Jan 2018	No	Active	0	Modify	Delete
testt	mc test rule	Healthy Working invitation	17 Jan 2018	No	Active	0	Modify	Delete

In most cases, you are looking for email schedules that are overdue. That is to say, the **Send date** has passed for a **Repeating** schedule that is not **Suspended**. You can cause the notification of a schedule waiting for approval to be re-sent to the owner by **Modify**ing the schedule and setting the **Send Date** to the current date.

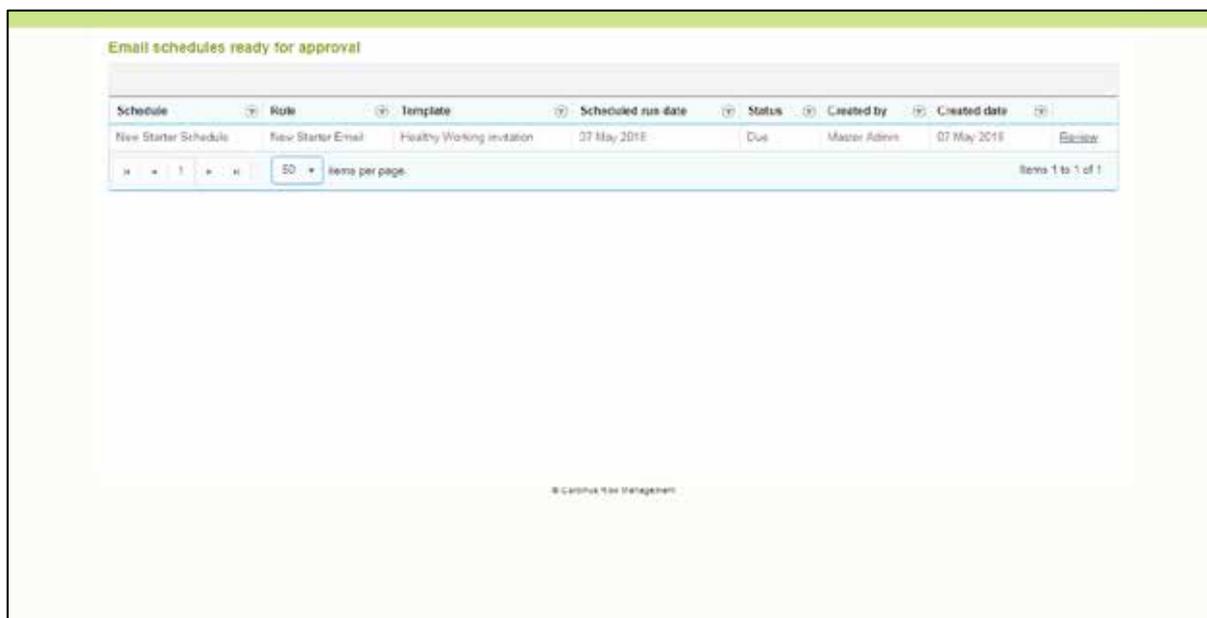
1.4.4 Approving schedules

Once the schedule is active the **Approver** of the schedule will receive notification that a schedule is due to be released and the names of the people who will receive it.

The process for approving a schedule is to go to the Email menu and to Select the **Approve** option from the menu.

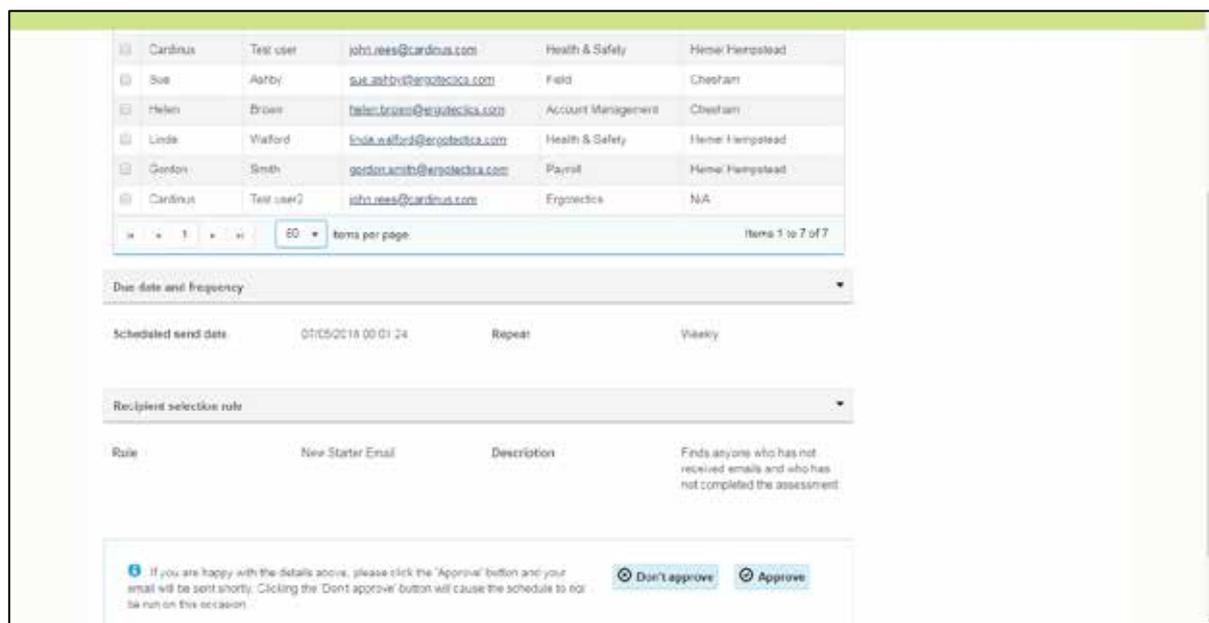


A list of emails for approval will be seen



By clicking on Review the detail of the email schedule can be seen along with the email template and a list of recipients. At this stage recipients can be removed if necessary and the email approved. This will have the effect of sending an individual email to each named person on the list.

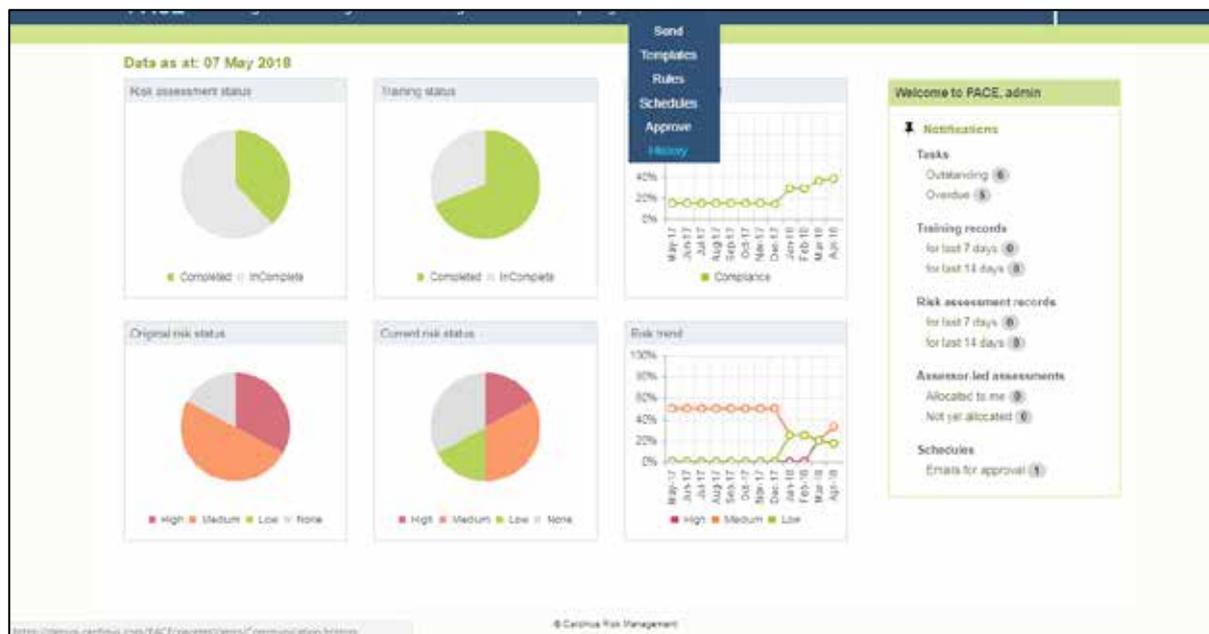
If it is not approved then the email will be regenerated at the next date when it is due to run.



1.5 Email History

When emails are sent from the PACE system a history is maintained in the user records for each email that is sent. This can be useful in cases of non-compliance.

The Email history can be accessed from the Email menu on the PACE home screen.



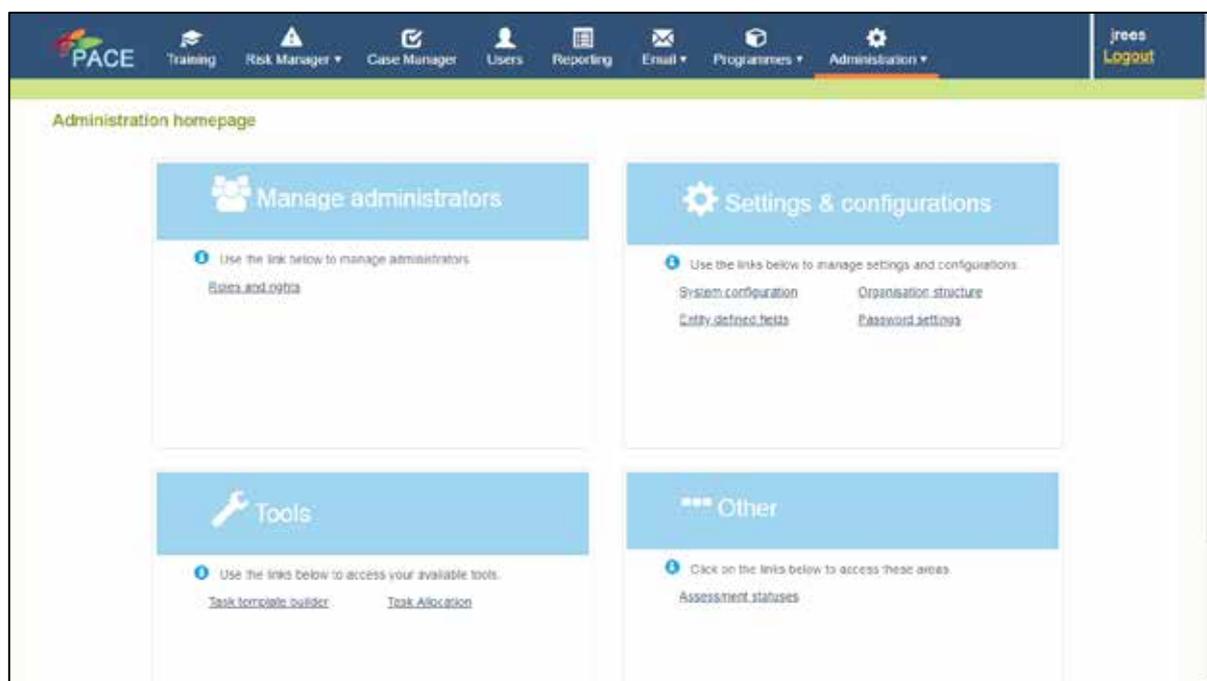
Email history

Sent date	Template name	Schedule name	Rule name	Recipient User ID	Recipient email address	View
07 May 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
06 May 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
05 May 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
04 May 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
03 May 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
02 May 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
01 May 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
30 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
29 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
28 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
27 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
26 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
25 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
24 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
23 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
22 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
21 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View
20 Apr 2015	Authorisation request	New Starter Schedule	New Starter Email	admin	john.rees@cardinus.com	View

The detail of each email can be accessed from the View menu against each individual email.

2.0 Administration

The administration menu allows administrators with appropriate rights to change some of the parameters that determine how the course user hub operates and what other administrators can access in PACE.



2.1 Roles & Rights

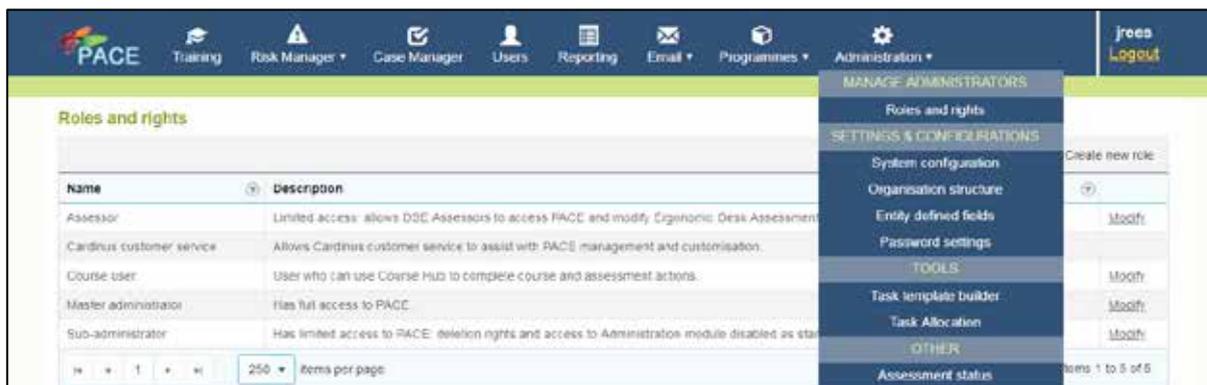
In order to perform any action in PACE, or the Course Hub, a user must have been allocated the “right” to perform that action. To save administrators the trouble of minutely deciding for each user exactly which rights they will need, “rights” are allocated through the assignments of “roles” that collect relevant rights into a single group. The standard “roles” provided by the PACE system are:

Assessor	Someone with restricted rights who can view certain elements of the system.
Master Administrator	An administrator with access to almost every aspect of PACE – the Master Administrator is likely to focus on the day-to-day running of the system.
Sub administrator	An administrator who is limited to a specified “area of control”.
Course User	A user who can access the Course Hub but who has no access to PACE.
Cardinus Customer Service	A special user role that enables authoring of the programme.

Users can be assigned multiple roles – in this case they will end up with a wide range of rights as they only need each right to exist in one of their many roles for them to be able to exercise it. It is also possible to define additional roles and allocate those to relevant users.

Roles and rights are managed through the **Administration** module of PACE. The **Roles and rights** menus sit under the **MANAGE ADMINISTRATORS** menu.

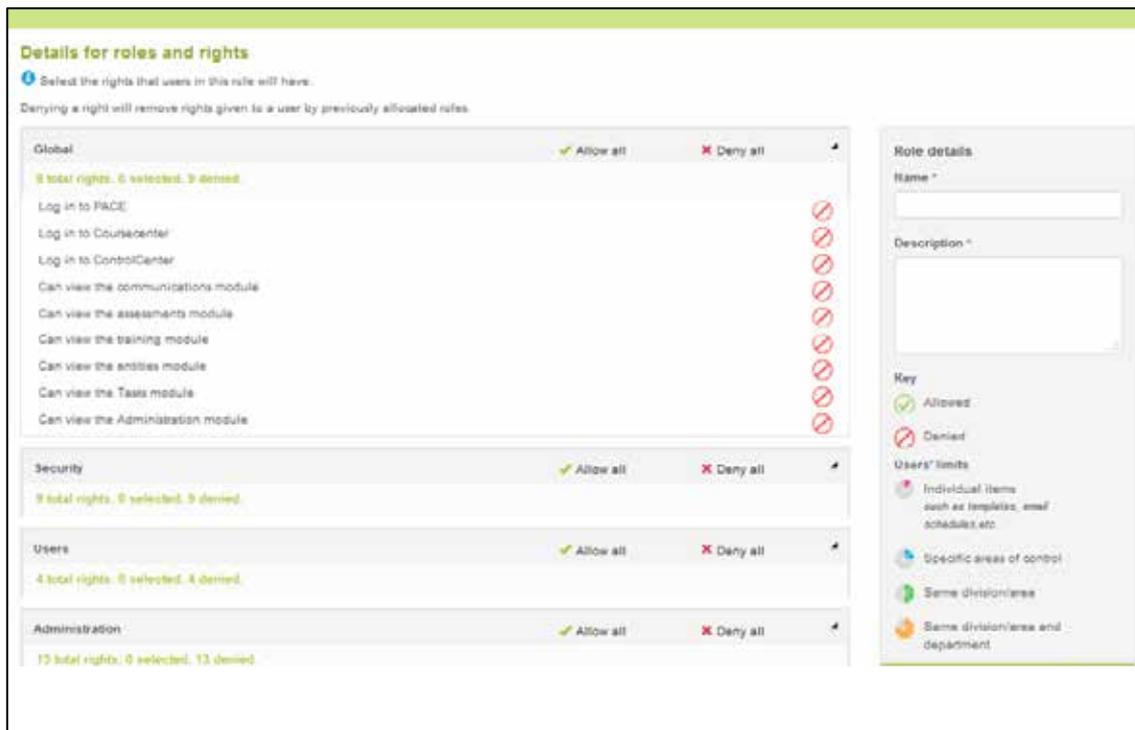




The **Roles and rights** screen lists all roles currently configured in the system. Administrators can perform one of two actions from this screen:

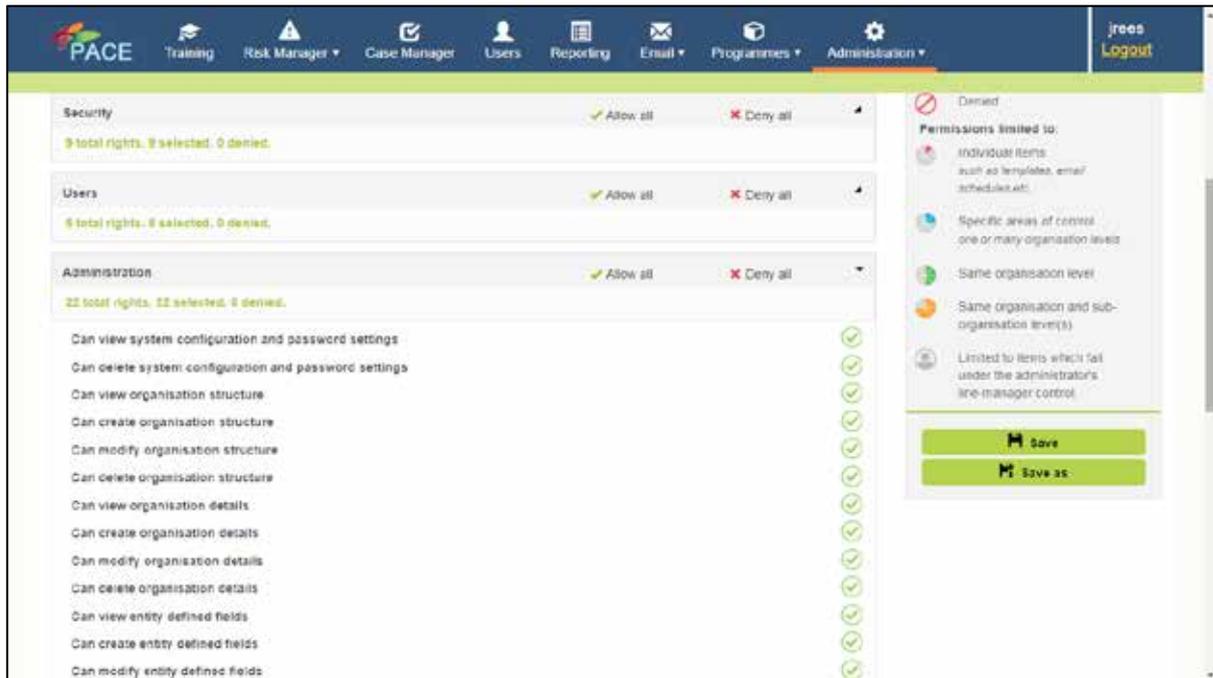
- **Create new role**
- **Modify** role

The **Details for roles and rights** screen is the same for creating a new role as it is for modifying an existing role. In all cases, the role must be given a **Name** and a **Description**. The rest of the screen is dedicated to the allocation of specific rights. The key rights have been organised into logical groups:



- Global** Rights that affect the whole system and rights that determine what elements of PACE, if any, users with the role will be able to access.
- Security** Rights that affect the user's ability to control access to the system.
- Users** Rights that affect the user's ability to modify user details.
- Administration** Rights that affect the user's ability to make changes to tasks and organisational structure.
- Communication** Rights that affect the user's ability to manage automated emails.
- Assessment** Rights that affect the user's ability to view the output of assessments and E-Learning.





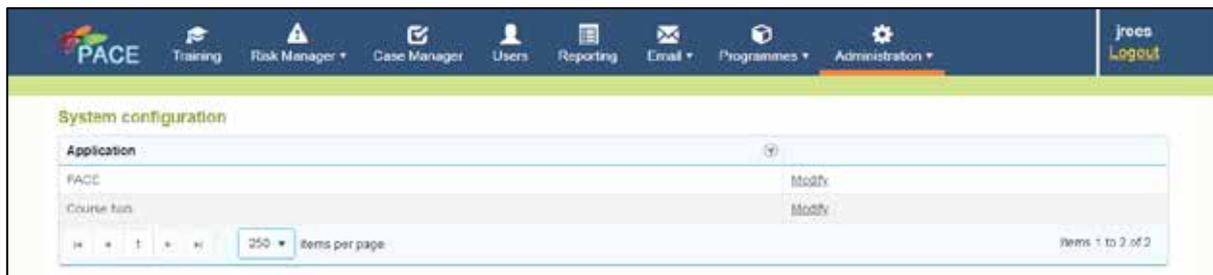
Use the small triangle in the header row for each rights section to either expand (show all the options) or hide the rights it contains. The **Allow all** button immediately places a green check (Allow) next to all rights in the section. **Deny all** places the deny icon against all rights.

If you want to edit the rights individually, you can do this by clicking the icon opposite each right. Each click cycles you through the available options:

	Allow – the user has this right.
	Denied.
	Individual items <i>such as templates, emails, schedules, etc.</i>
	Specific areas of control <i>one or many organisation levels.</i>
	Same organisational level.
	Same organisation and sub-organisational level(s).
	Limited to items which fall under the administrator's line-manager control.

When you have allocated all the rights your role will need / made all the changes you need, click **Save** and the role becomes available to be applied to users.

2.2 System Configuration

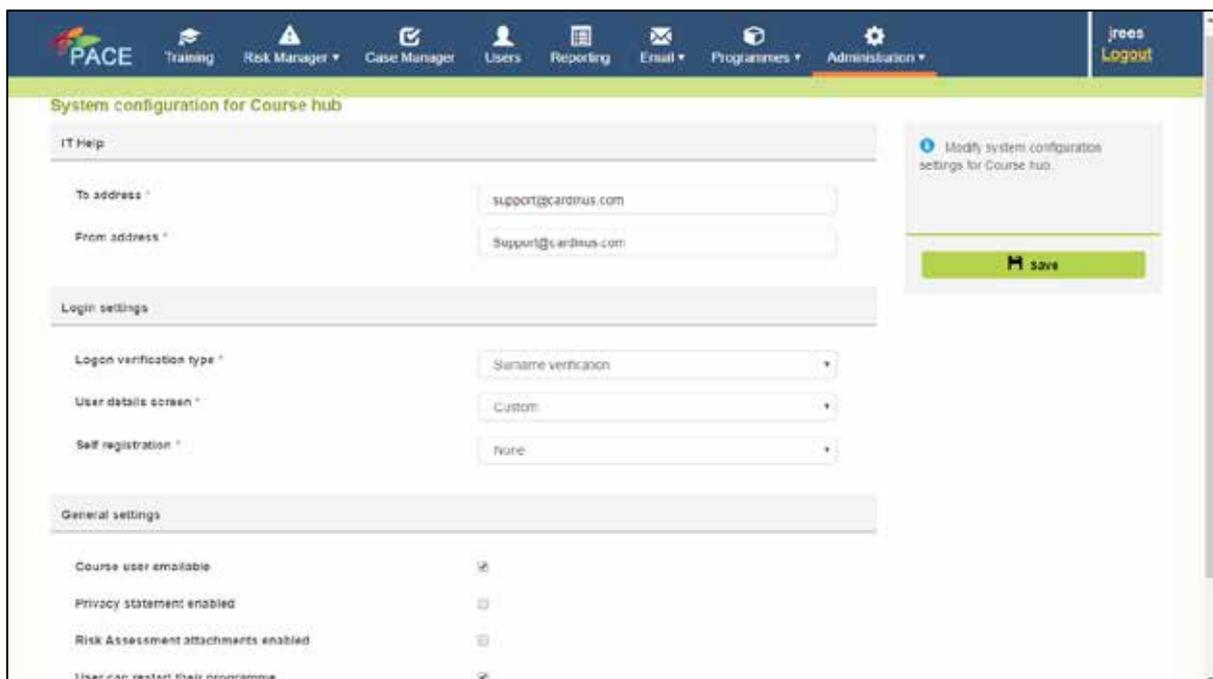


The System Configuration menu allow administrators with access to the Administration menu to change parameters in the course hub such as the email address for Support queries or whether self registration is enabled.

This is done by accessing the **Course hub** menu and changing the email addresses to suit. It should be borne in mind that in changing email settings it may affect how emails are sent and received so this should only be done in consultation with Cardinus.

It is also possible to:

- Enable/disable password or last name verification on login.
- To set self registration so that someone can register themselves on the database
- To set whether a user can be emailed or not.
- To enable a user to attach files to a risk assessment as they are doing it. This could be used for photos of a user’s workstation for example.
- To enable a user to restart the programme if required.



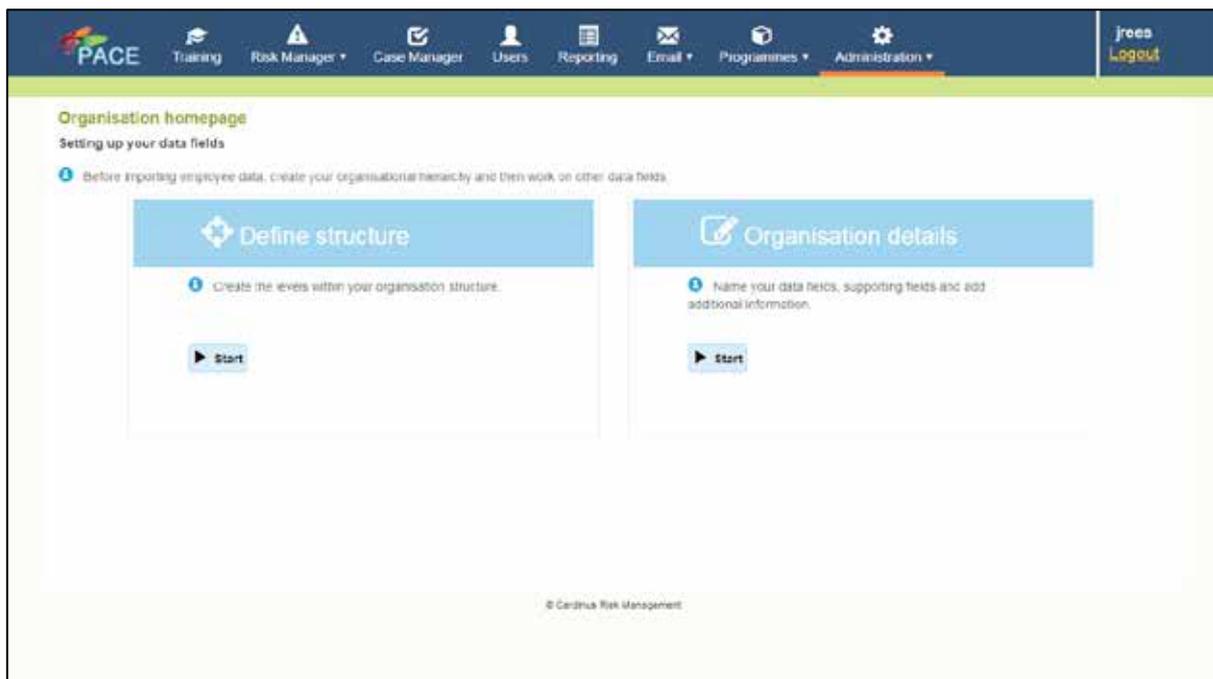
It is also possible to change some to the System settings in PACE by clicking on the PACE option in the menu above.

For example it is possible to change the date format, the default currency and the number of records shown on a page in PACE. This is set to 50 by default but changing the number and then saving the setting would change the number of records shown.



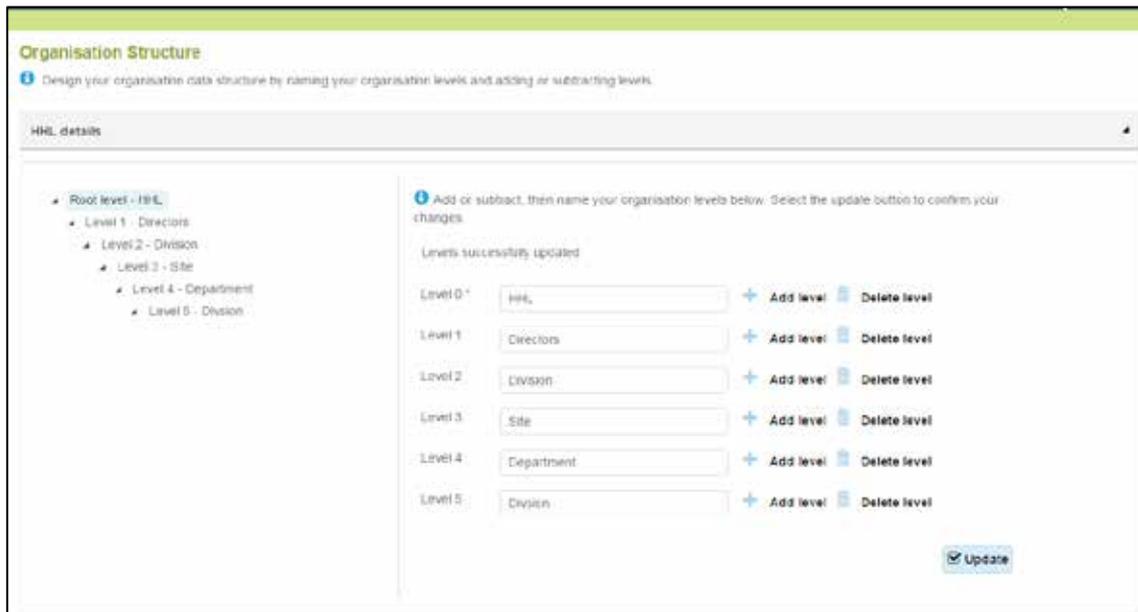
2.3 Defining your Organisation Structure

Organisation Structure is defined via the Administration section of PACE. You will find the link under the **Settings & Configuration** category. It also appears in the menu you see when you click the “Administration” icon at the top of your screen.



Setting up Organisation in PACE is a two-stage process. You begin by defining the structure, specifying how many organisational levels you will have and what they will be called. Click the **Start** button under “Define Structure” to begin.

In the example opposite we have set up PACE to reflect Option 2 from our real-life example. Use the **Add level** button to add further levels to your structure, using the text box to the left of that button to provide a name for that level. If you make a mistake at this point you can use the **Delete level** to remove levels.



NOTES -

- Level names can only include letters and numbers. Special characters, including spaces, are not allowed in level names.
- You will not be able to delete levels once you have started adding Organisations to your structure.
- Use singular level names (as opposed to plural)

2.3.1 Organisation Defined Fields

Organisation Structure
 Design your organisation data structure by naming your organisation levels and adding or subtracting levels.

HHL details

- Root level - HHL
 - Level 1 - Director
 - Level 2 - Division
 - Level 3 - Site
 - Level 4 - Department
 - Level 5 - Division

Add or subtract, then name your organisation levels below. Select the update button to confirm your changes.

Level 0	<input type="text" value="HHL"/>	+	Add level	-	Delete level
Level 1	<input type="text" value="Director"/>	+	Add level	-	Delete level
Level 2	<input type="text" value="Division"/>	+	Add level	-	Delete level
Level 3	<input type="text" value="Site"/>	+	Add level	-	Delete level
Level 4	<input type="text" value="Department"/>	+	Add level	-	Delete level
Level 5	<input type="text" value="Division"/>	+	Add level	-	Delete level

HHL defined fields

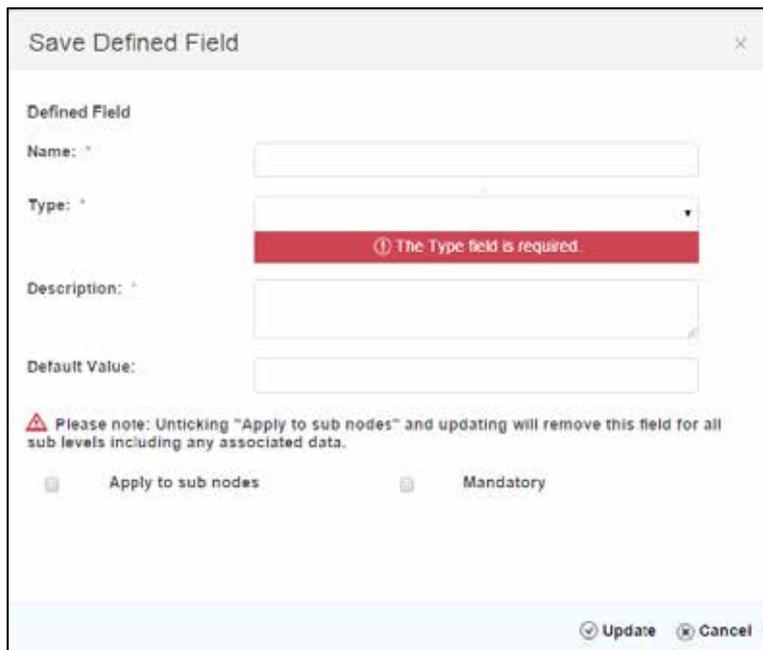
[+ Add new record](#)

Name	Type	Mandatory	Default Value	Updated		
Street.Address	Text	false		11/12/2015 15:23	Modify	Delete

Finished defining your organisational structure? Now define your data.

You have the option to define for each level special fields which capture extra information about organisations at that level. To define these fields for a given level, start by clicking the level on the left hand side of the Organisation structure screen. In the example opposite, the HHL level has been selected. Click the small triangle in the defined fields bar at the bottom of the screen to expand that section.

You can **Modify** or **Delete** existing fields with the links displayed against that field. Be careful here – delete the field and you lose any data currently stored against it for current organisations.



Click the **Add new record** button to add new fields. You will need to provide a **Name** for the field, and to define the **Type**. You have four options for field type:

Text – the field will accept all characters

Numeric – the field will accept only numeric values

Boolean – the field allows only two answers – “true” or “false” (it will be displayed as a check box)

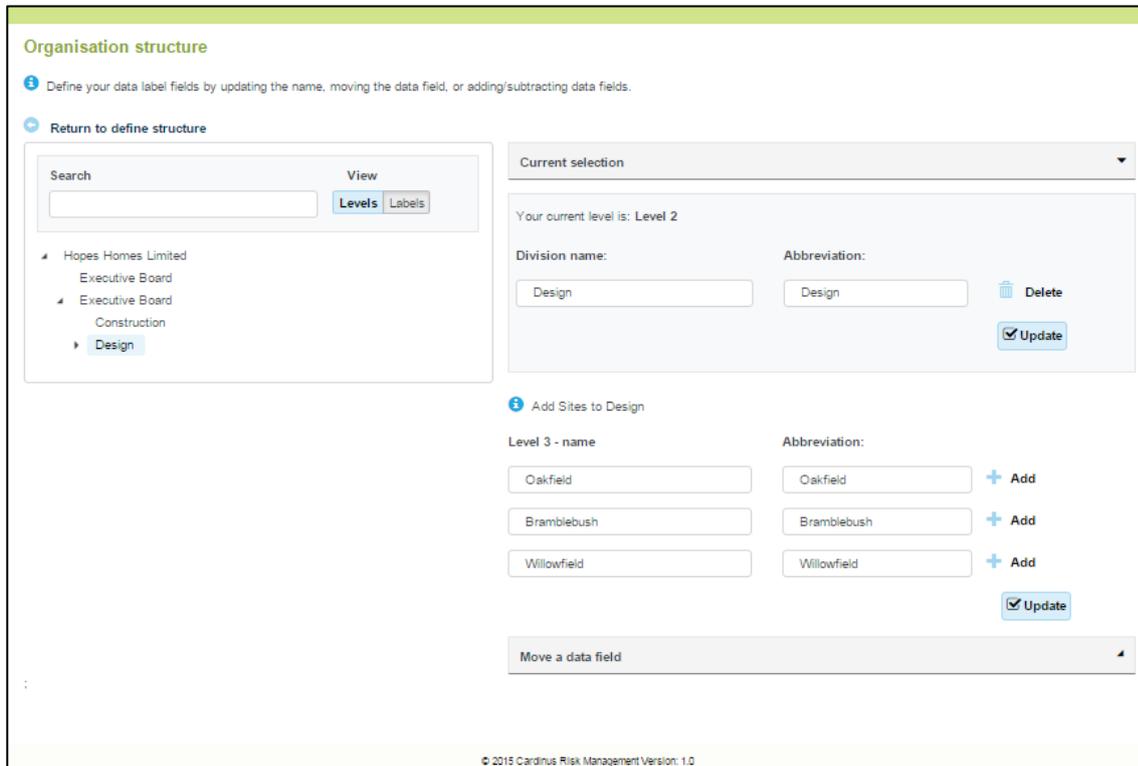
Date – the field will display a calendar tool and accept only date values.

Use the **Description** field to specify what the field is for. Check the **Apply to sub nodes** box to make the field appear in all levels below your currently selected level, and check **Mandatory** if you want to ensure that the field is always updated.

Click **Update** to create your field.

2.3.2 Adding organisations to your Structure

With your structure in place, you can add Organisations via the “Organisation details” option from the Organisation Structure home page. The screen is divided into 2 sections. On the left hand side of the screen you can see the structure you have defined and the Organisations that exist at that level. The right-hand side of the screen is used to create or amend Organisations.



Note - Proceed with caution – it is not always easy to rectify mistakes made in this section of PACE. Before editing any fields in the right-hand side of the screen be absolutely certain that you have selected the correct Organisation on the left-hand side.

You add Organisations at the currently selected level using the blue shaded area at the top of the right-hand side of the screen. Provide a name for the Organisation in the **[Level name] name** field (in the example above, this field is labelled **Division name** because we are working at the Level 2 and we have already defined Level 2 as “Division”. Enter an **Abbreviation** (a shorter version of the full name used for convenience and easy reference) – if you do not have an abbreviated version, simply enter the same value as for **name**. Click **Update** to add your Organisation.

The section below the blue-shaded area is used to add Organisations to the next level down. These Organisations will be linked to the Organisation you have selected on the left-hand side of the screen. The **Add** button to the right of the **name** and **Abbreviation** fields in this section generates a new line of fields, allowing you to add multiple Organisations at the lower level. Click **Update** when you have added all the Organisations you need.

Current selection ▼

Your current level is: Level 0

HHL name: **Abbreviation:** Delete

Update

+ Add Directors to Hopes Homes Limited

Level 1 - name **Abbreviation:**

+ Add

+ Add

Update

User Defined Fields ▲

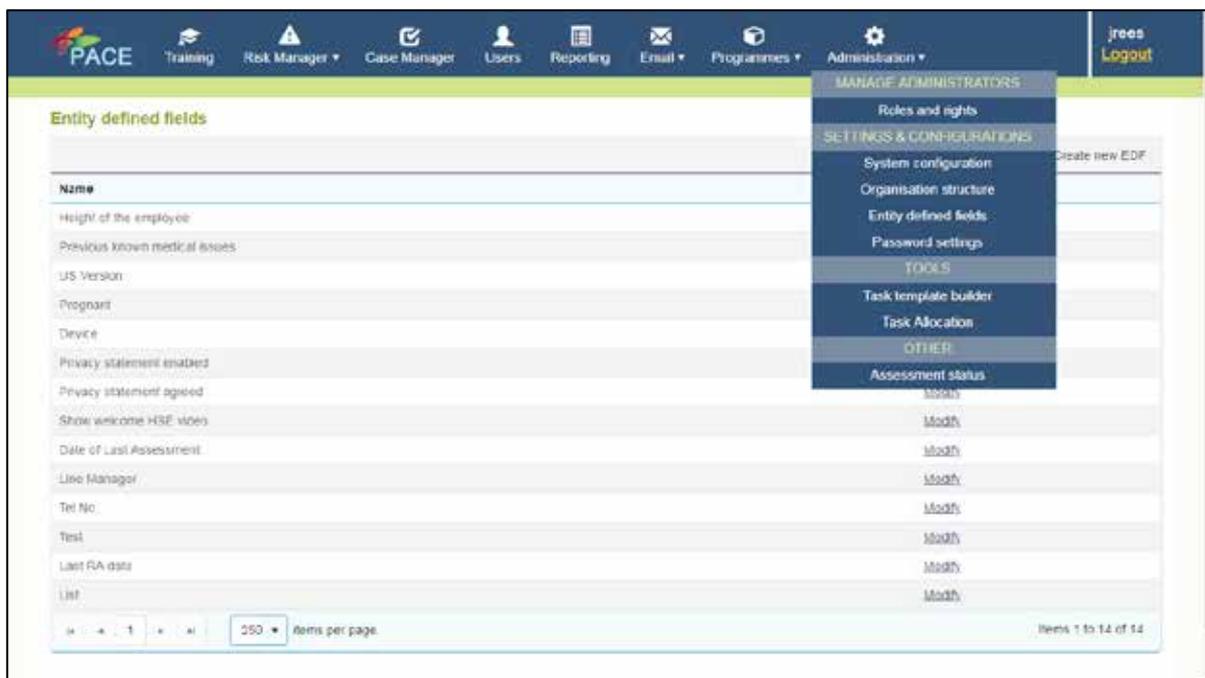
Street Address

Update

If you are creating Organisations at a level for which you have added defined fields, you will see a section for **User Defined Fields** at the bottom of the screen. You can enter the relevant information for the Organisation you are adding via these fields. If you have set the fields as mandatory then the system will prompt you to complete them before allowing you to add the Organisation.

2.4 Entity Defined Fields

Entity defined fields (EDFs) are fields which can be created in PACE to hold additional data about individuals.

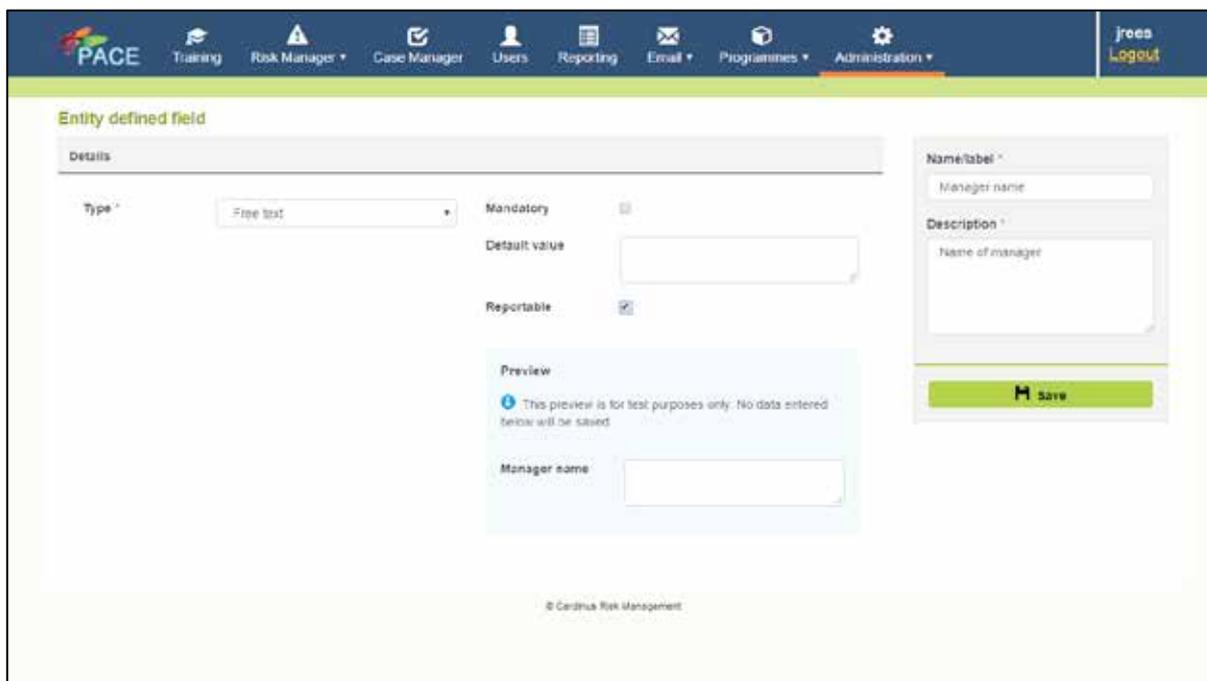


As standard there are a number of **EDFs** pre built into PACE. If these are not required they can be removed. If you decide that you need additional information in the database that cannot be stored in the organisation levels then you can create an entity defined field.

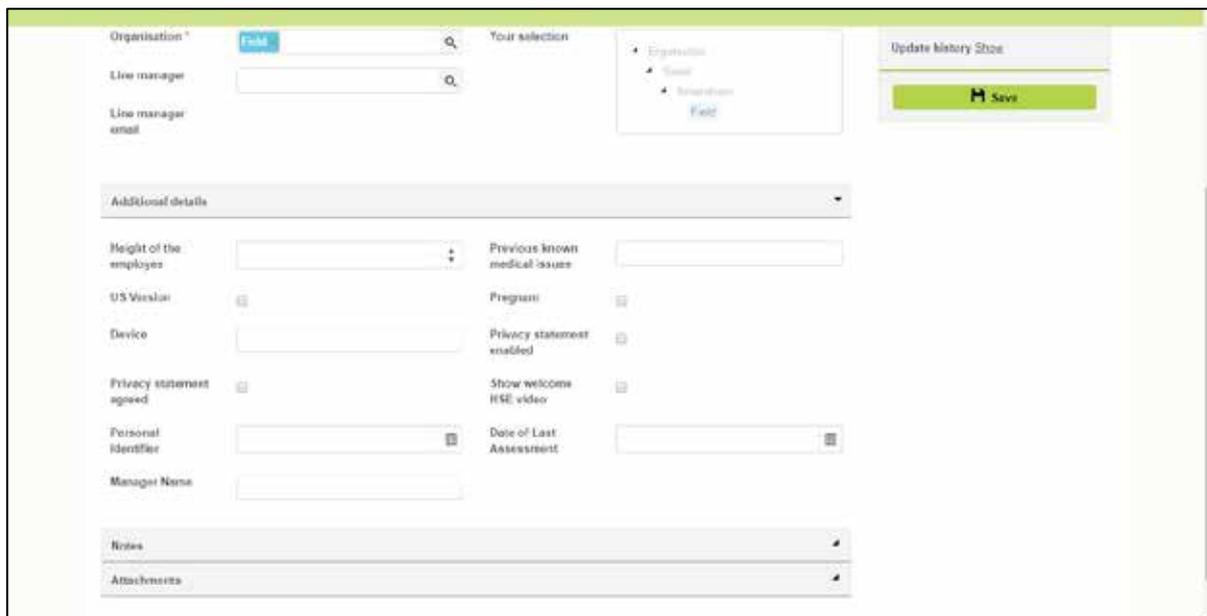
For example you may wish to store the name of the individual’s manager as part of your data feed. In this case you would click on the **Create new EDF** menu item on the screen above.

There are various data types that can be selected such as date or free text. The field can also have a default value and be mandatory if required.

In this case it is a free text field **Manager name** and is also reportable so it would also appear as a selectable field for use as an additional field in the **Reporting** section.

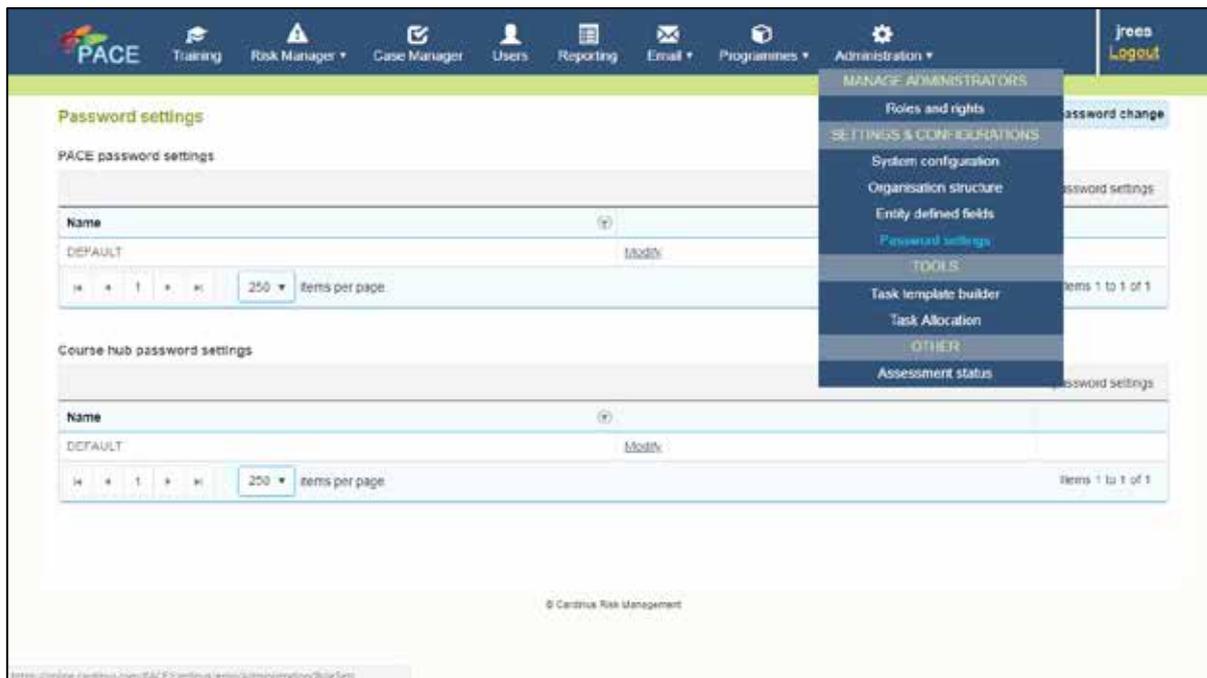


Saving and closing the field makes it available in the user record as can be seen in the screenshot below for **Manager name**.



N.B. It should be noted that if the **EDF** is to be populated through an automatic feed of data, the name of the field in the import file supplied must match exactly the name of the created field.

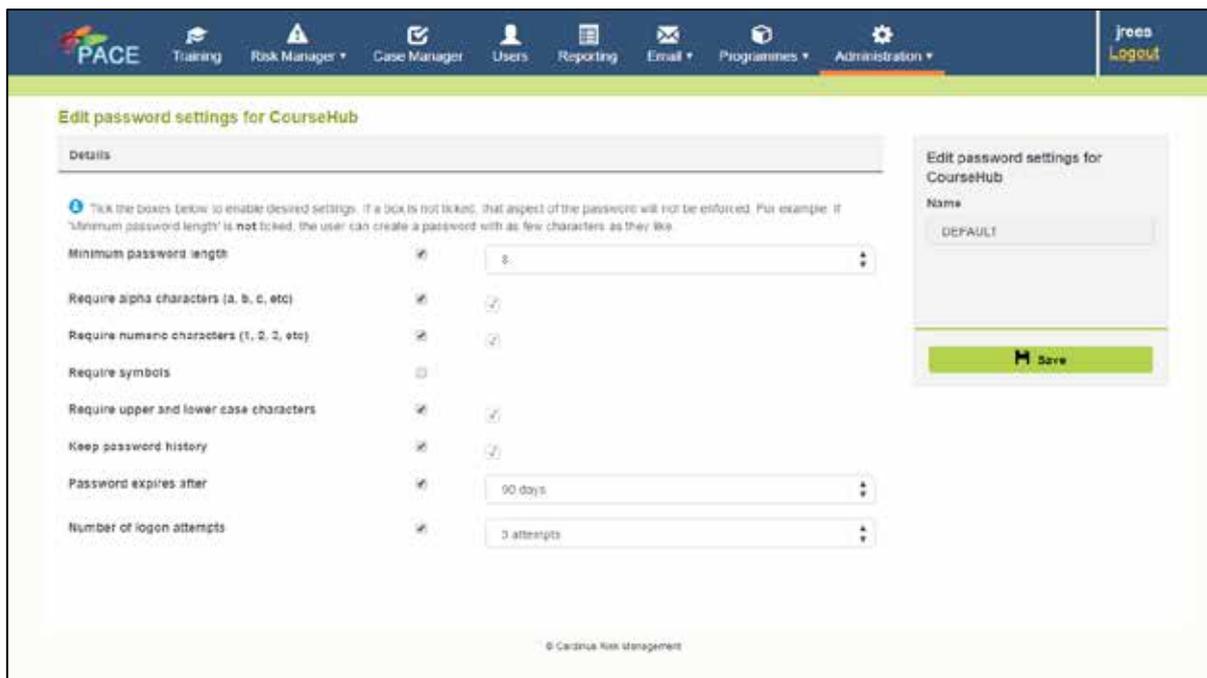
2.5 Password Settings



Password Settings are accessed via the **Administration** section of PACE.

Password settings can be changed for Course users or for Administrators.

From the **Password Settings** screen you can make all current users change their passwords on next log in (via the **Force password change** button on the right-hand side of the screen). Click **Modify** to view or change the rules that govern user passwords.



Edit Password Settings gives you complete control over what users must include for their PACE password to be considered valid.

Minimum Length states the minimum number of characters for a valid password.

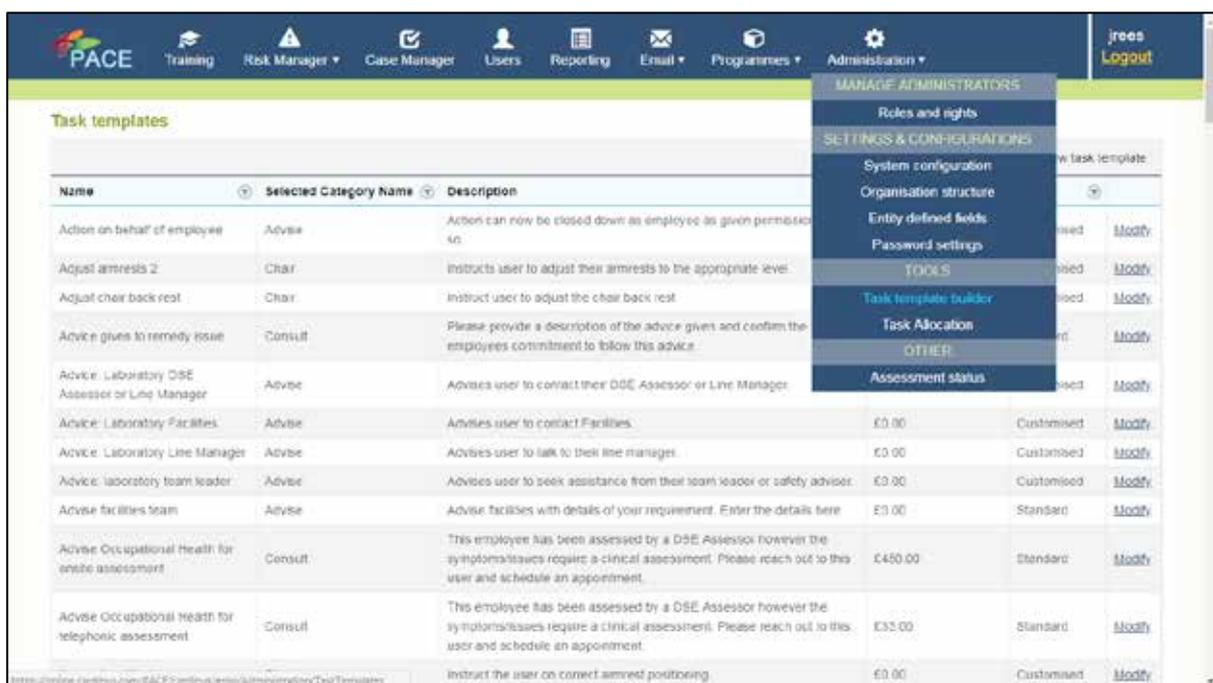
- Include alpha characters** requires users to include at least one letter.
- Include numeric characters** requires a user to include at least one number.
- Include symbols** requires a user to include at least one non-alphanumeric character (such as a punctuation mark) in their password.
- Include Upper and lower case character** requires that there is at least one letter which is a capital letter and one letter that is not.
- Keep password history** determines whether PACE keeps a record of all previous passwords.
- Days valid for** determines the number of days after which PACE will ask the user to change their password.
- Login attempts** determine the number of times the user can enter the wrong password before their account is locked out.

If you want to change the password settings make the changes and then click **Save** to apply them.

2.6 Task Template Builder

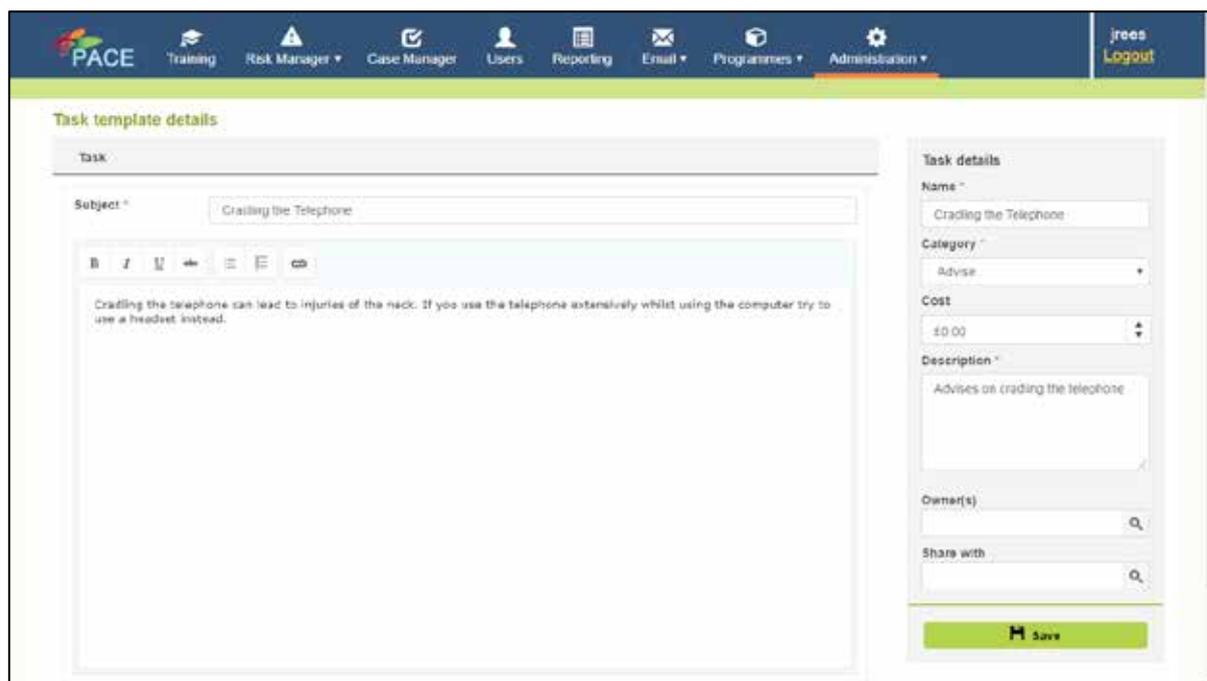
Tasks in PACE are actions that are set up primarily to attach to the Healthy Working Plan so that when a user has completed a risk assessment they receive the advice related to any risks that have been raised.

The menu Task Template Builder is accessed from the Administration menu.



A list of tasks can be seen. Each one has a type, either **Standard** or **Customised**. The standard tasks are not modifiable nor are they allocated to any questions in the risk assessment. We will therefore focus on the **Customised** tasks only.

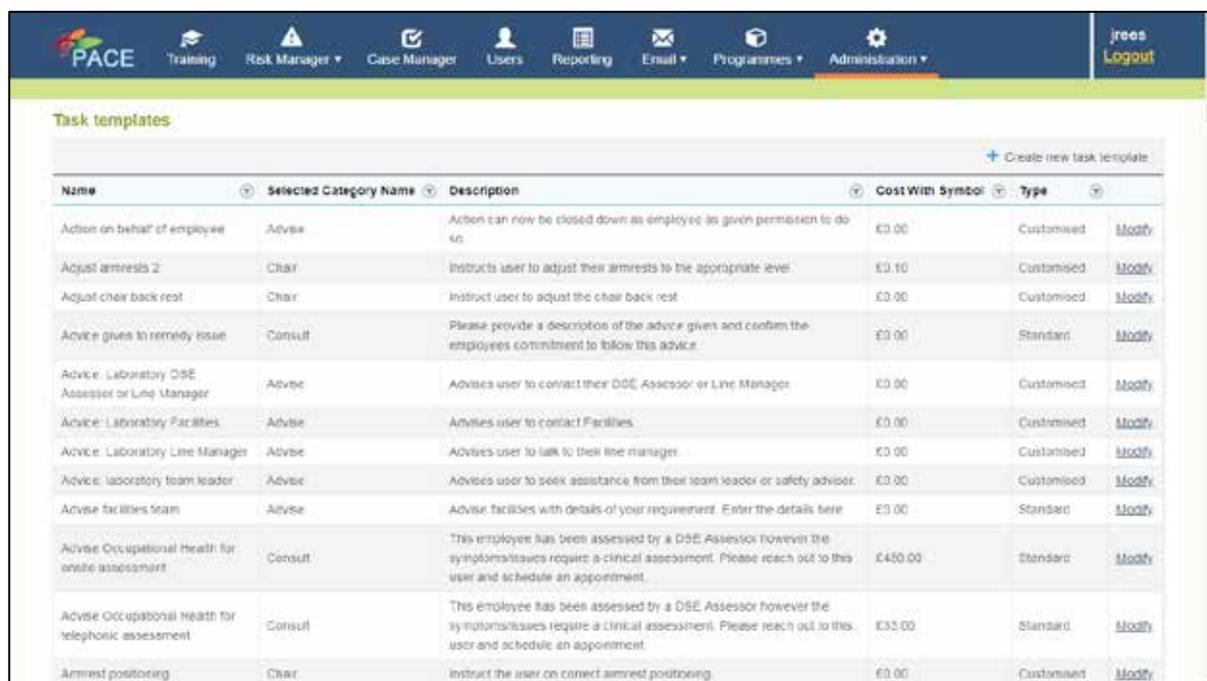
Clicking on Modify will open up the task details



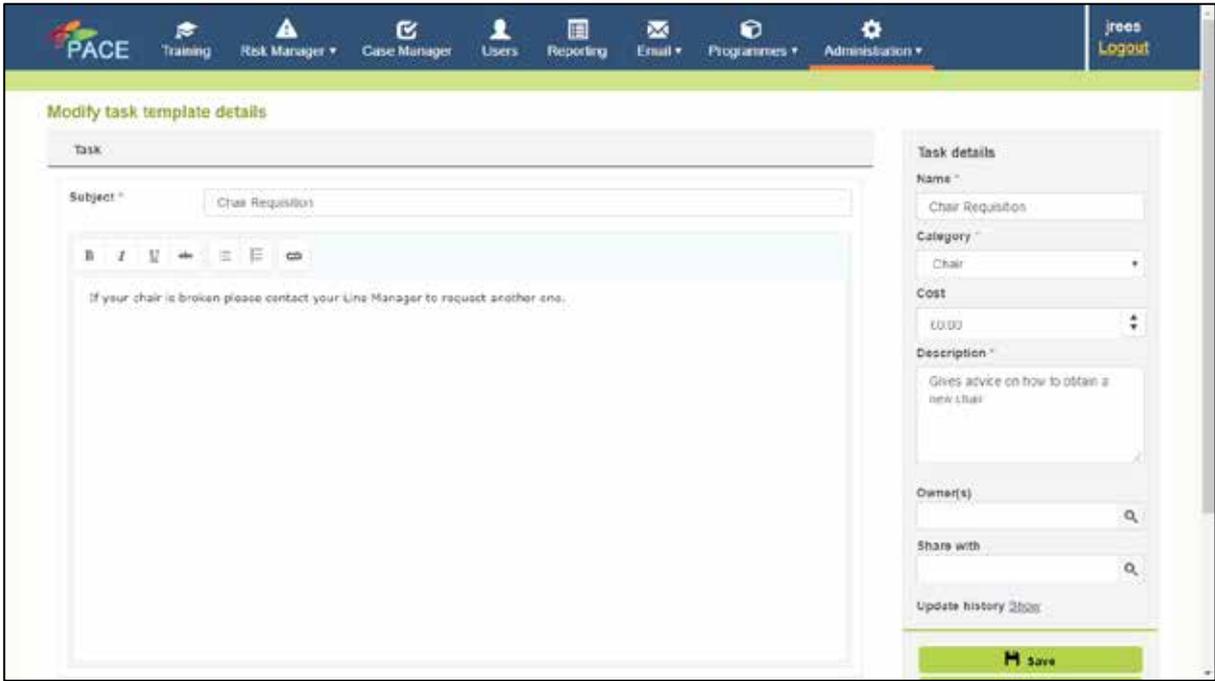
In the example above **Cradling your phone** it is possible to modify the text or to add hyperlinks to a web page or to an email address. This will modify the advice that is given to the user in the Healthy Working Plan.

Adding a new Task template

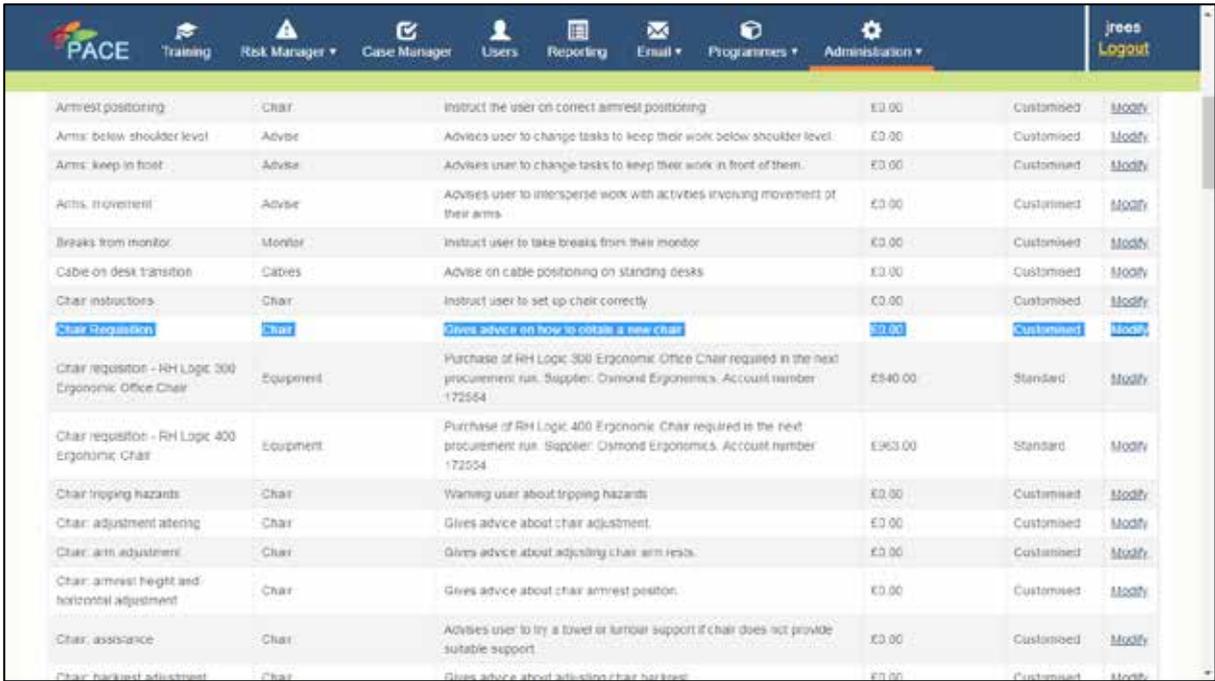
It is possible to create a new task template from the list by clicking on **Create new task template**.



A blank template form will then appear and the details can be completed as per the example below.



Once the detail has been completed then the template can be saved and will appear in the list. It can then be allocated to a question in the risk assessment.



Task	Category	Description	Cost	Status	Action
Armrest positioning	Chair	Instruct the user on correct armrest positioning	£0.00	Customised	Modify
Arms below shoulder level	Advice	Advise user to change tasks to keep their work below shoulder level.	£0.00	Customised	Modify
Arms keep in front	Advice	Advise user to change tasks to keep their work in front of them.	£0.00	Customised	Modify
Arms movement	Advice	Advise user to intersperse work with activities involving movement of their arms.	£0.00	Customised	Modify
Breaks from monitor	Monitor	Instruct user to take breaks from their monitor	£0.00	Customised	Modify
Cable on desk transition	Cables	Advise on cable positioning on standing desks	£0.00	Customised	Modify
Chair instructions	Chair	Instruct user to set up chair correctly	£0.00	Customised	Modify
Chair Requisition	Chair	Gives advice on how to obtain a new chair	£0.00	Customised	Modify
Chair requisition - RH Logic 300 Ergonomic Office Chair	Equipment	Purchase of RH Logic 300 Ergonomic Office Chair required in the next procurement run. Supplier: Diamond Ergonomics. Account number 172554	£540.00	Standard	Modify
Chair requisition - RH Logic 400 Ergonomic Chair	Equipment	Purchase of RH Logic 400 Ergonomic Chair required in the next procurement run. Supplier: Diamond Ergonomics. Account number 172554	£963.00	Standard	Modify
Chair tripping hazards	Chair	Warning user about tripping hazards	£0.00	Customised	Modify
Chair: adjustment altering	Chair	Gives advice about chair adjustment.	£0.00	Customised	Modify
Chair: arm adjustment	Chair	Gives advice about adjusting chair arm rests.	£0.00	Customised	Modify
Chair: armrest height and horizontal adjustment	Chair	Gives advice about chair armrest position.	£0.00	Customised	Modify
Chair: assistance	Chair	Advise user to try a towel or turtleneck support if chair does not provide suitable support.	£0.00	Customised	Modify
Chair: backrest adjustment	Chair	Gives advice about adjusting chair backrest.	£0.00	Customised	Modify

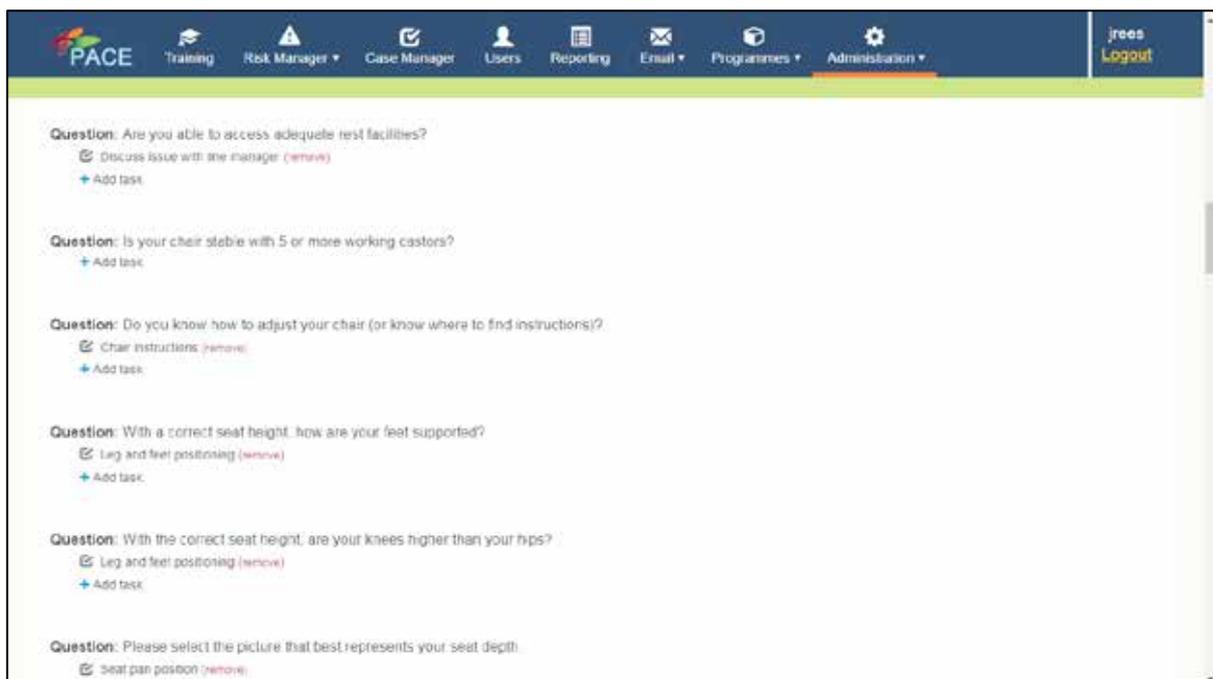
2.7 Task allocation

Although your tasks should already be allocated during system set up it may be that you wish to allocate some different advice to a question. This is done through the **Task allocation** menu under Administration.

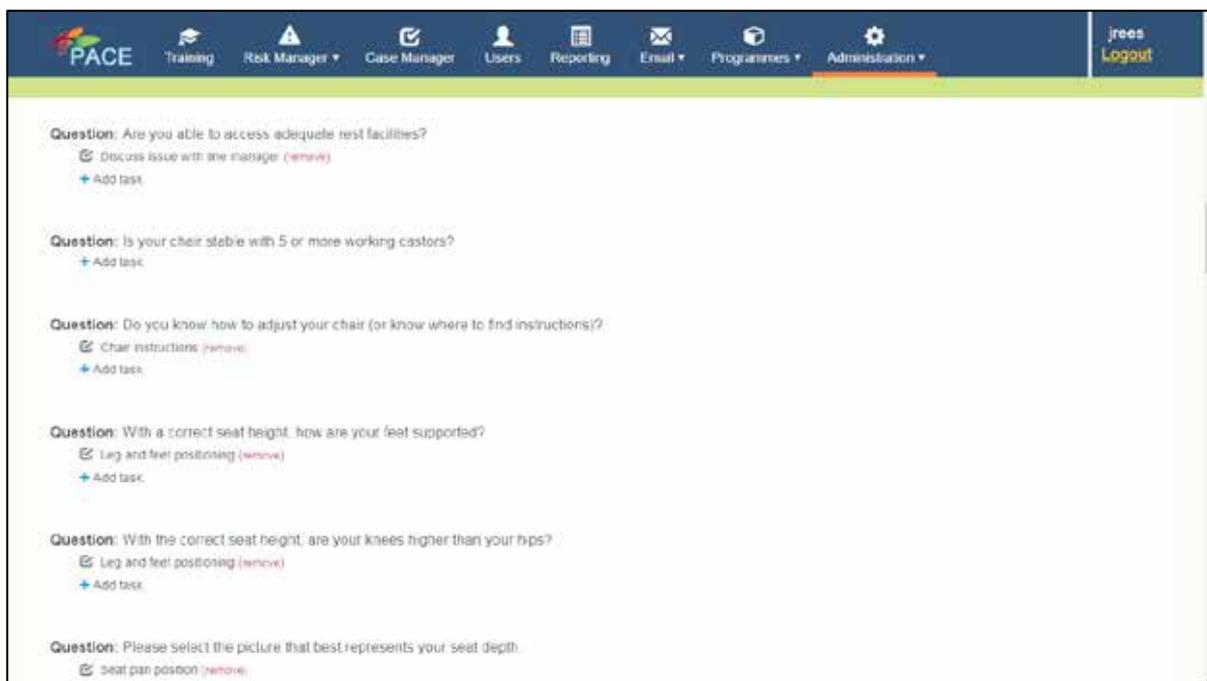
On entering this menu you have an option of which course you can allocate the task to. In this case **Healthy Working** has been selected.



A list of questions and the tasks allocated then appears.

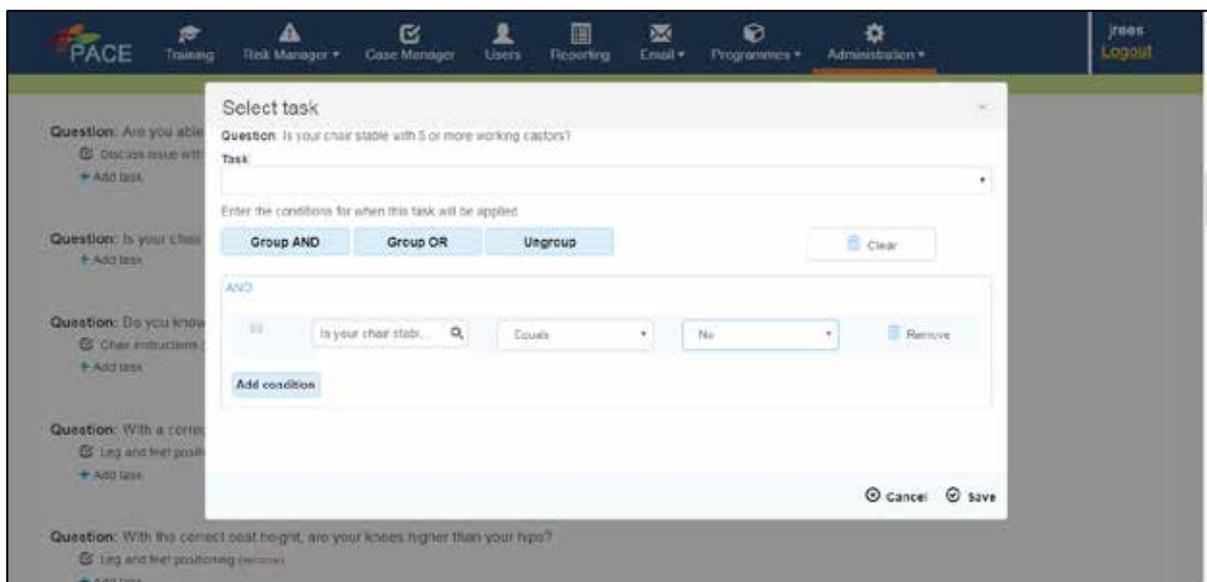


You will notice that for some questions there is no advice attached. This is either because they are profiling questions or a primary question for which no advice is needed.

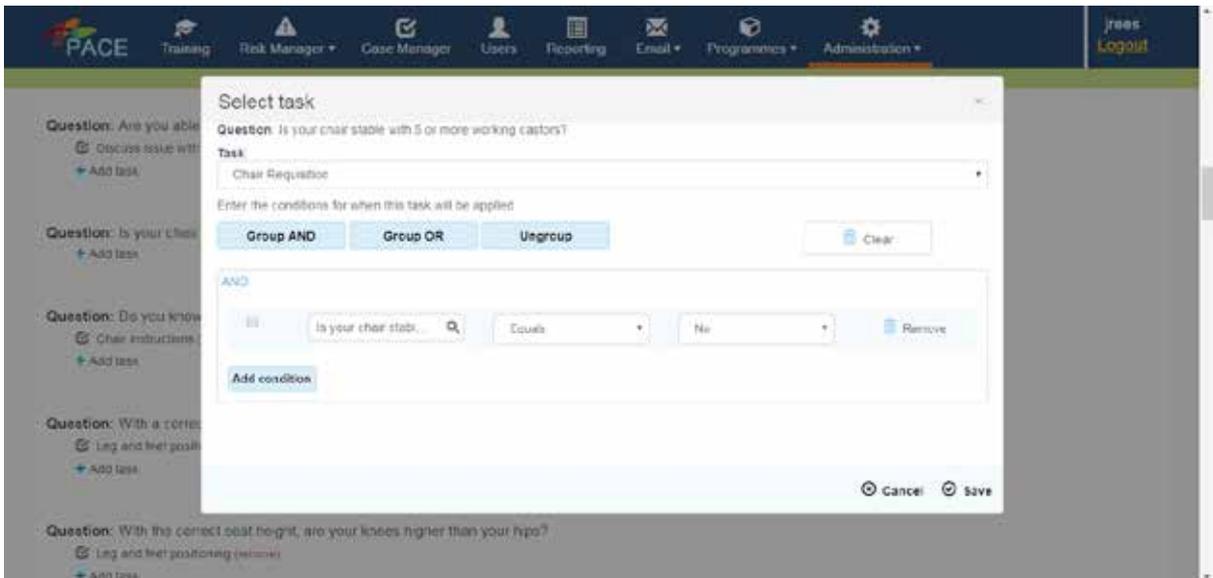
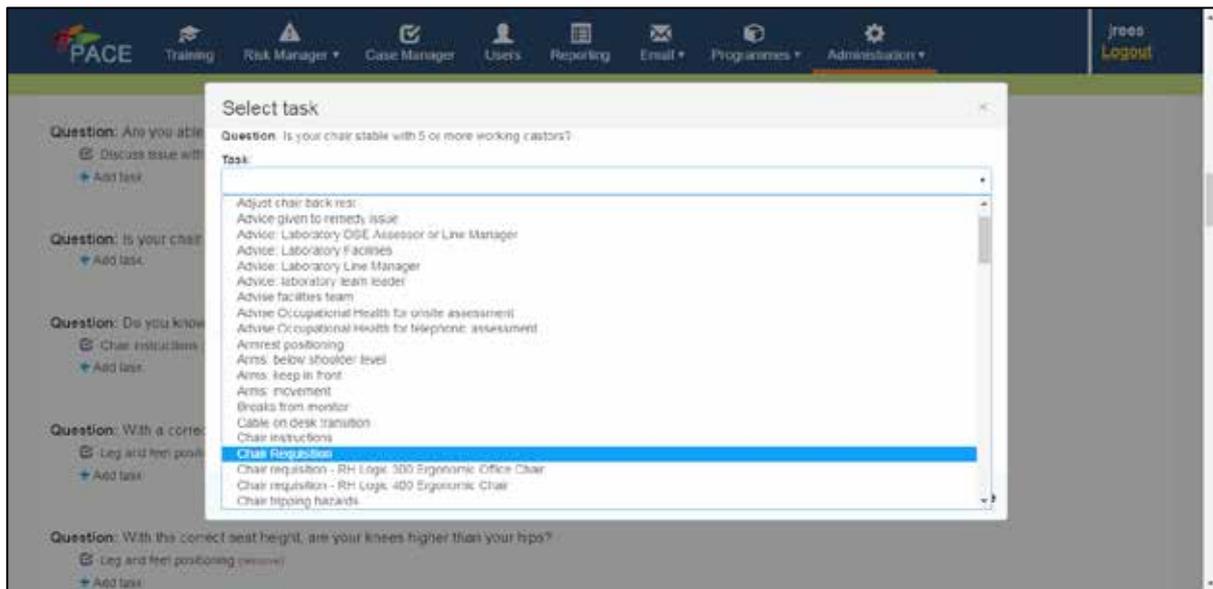


In the example above we can see that the **Question: Is your chair stable with 5 or more working castors?** does not have a task attached to it. Therefore if this question is raised in someone’s risk assessment it will not provide advice to the user.

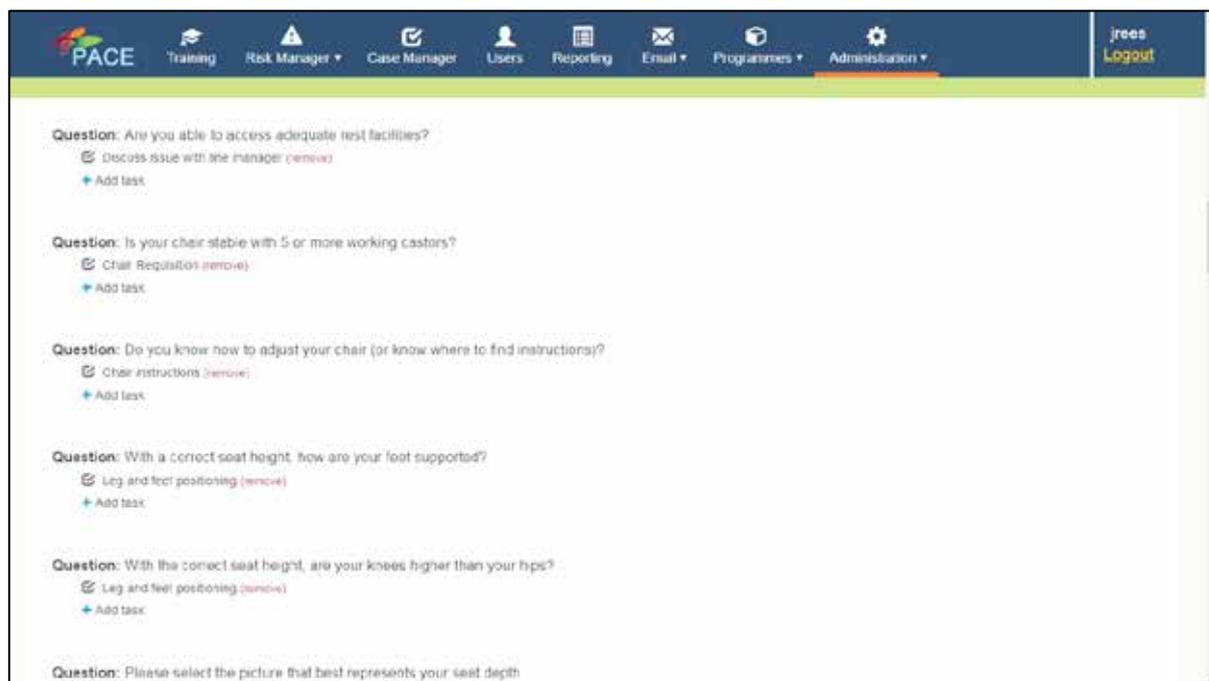
To add advice click on **Add task**



The condition for this question to trigger advice is shown and the relevant **Task code** Chair requisition can be selected from the box with the header **Task**.



Saving this will then show the task allocated to the question.



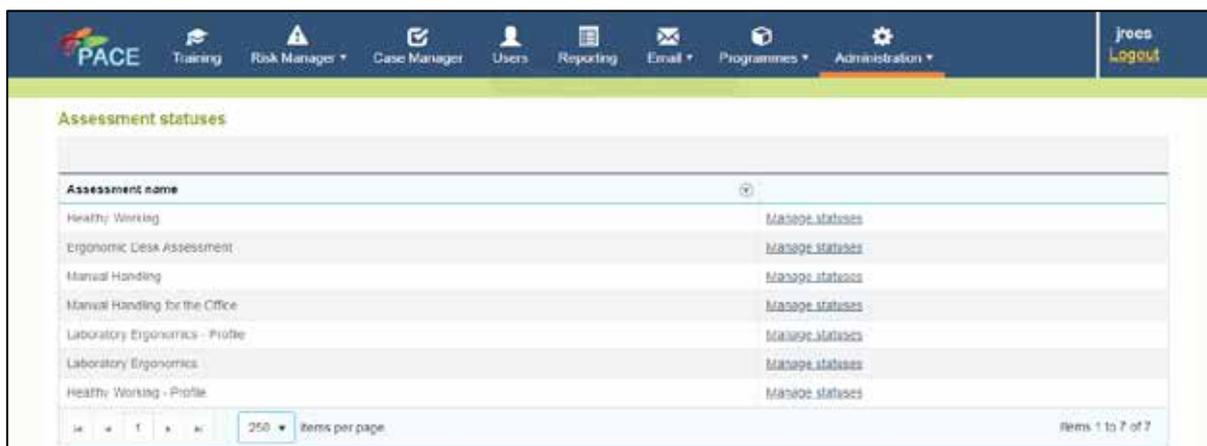
This advice will then appear in the Healthy Working Plan for any user who answers the question with a No in the risk assessment.

2.8 Assessment Status

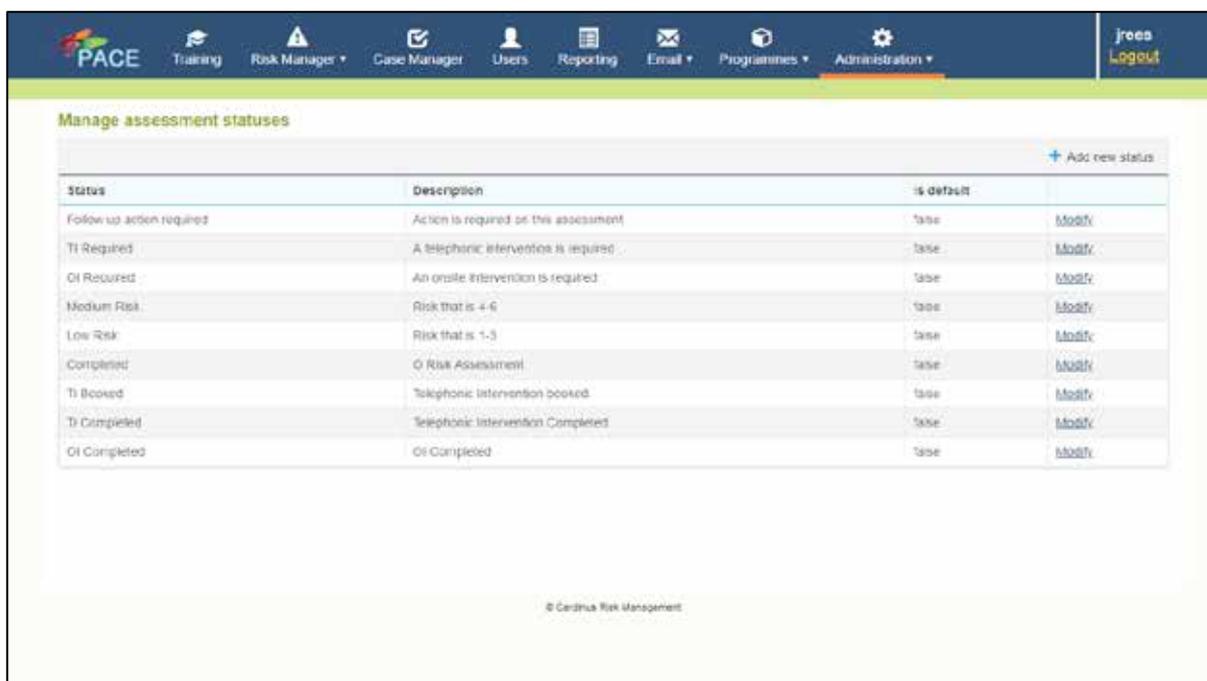
The Assessment status menu is a way of creating and modifying statuses that are allocated to risk assessments so that these can be used to filter the risk assessments according to their status.

The menu is accessed from the Administration menu on the PACE home page.

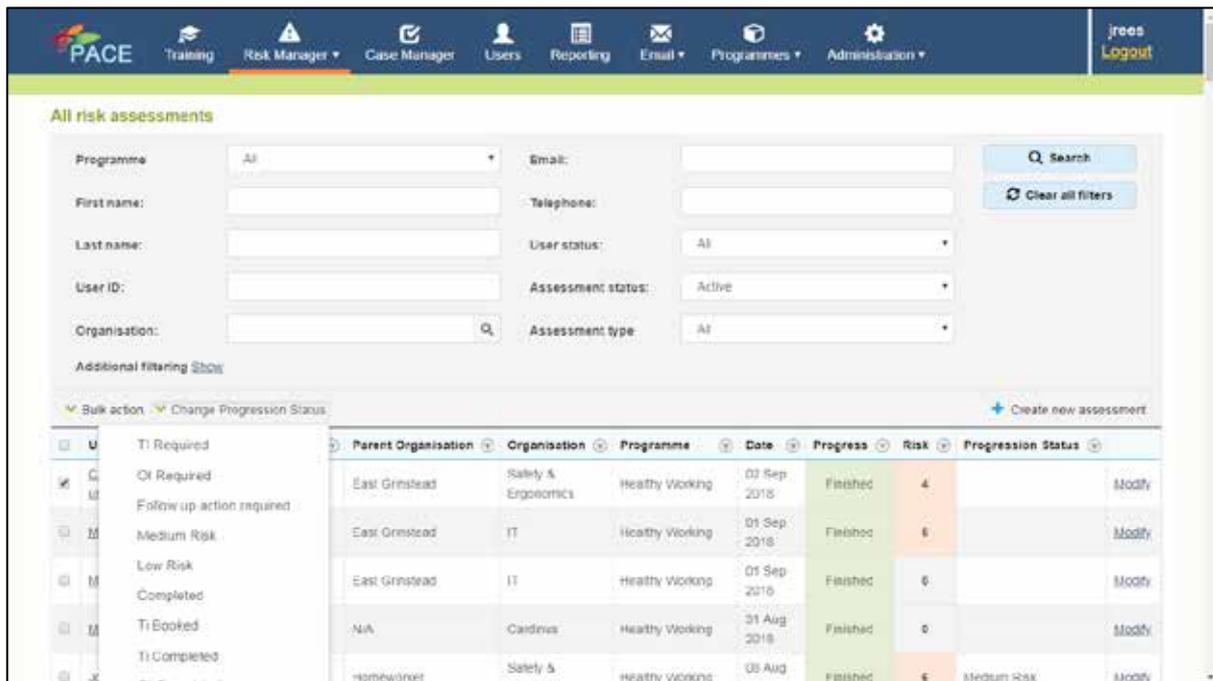




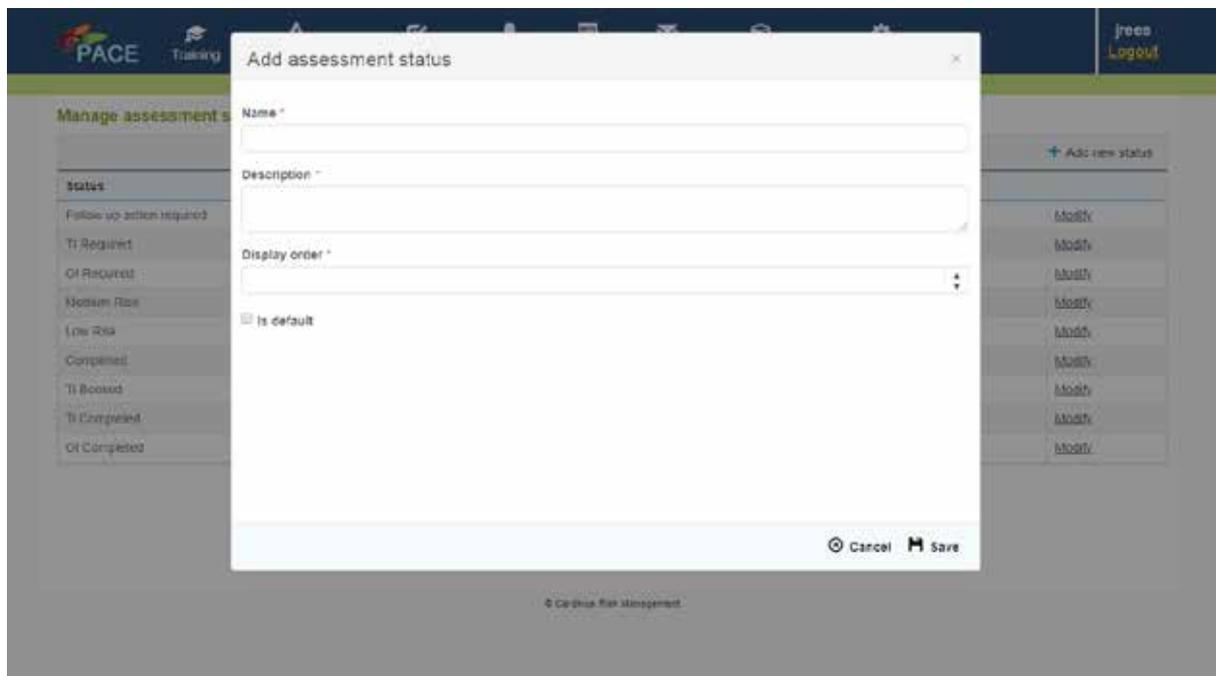
Clicking on Manage statuses for Healthy Working will show a list of any that have been created.



These are used in the risk assessment Menu by checking the box to the left of the risk assessment(s) in the Assessments menu and selecting the Change Progression Status.



To create a new Assessment status the **Add new status** menu can be selected.



Once completed and Saved the new assessment status will appear in the list and will be available in the risk assessments.