Hanlon
software solutions

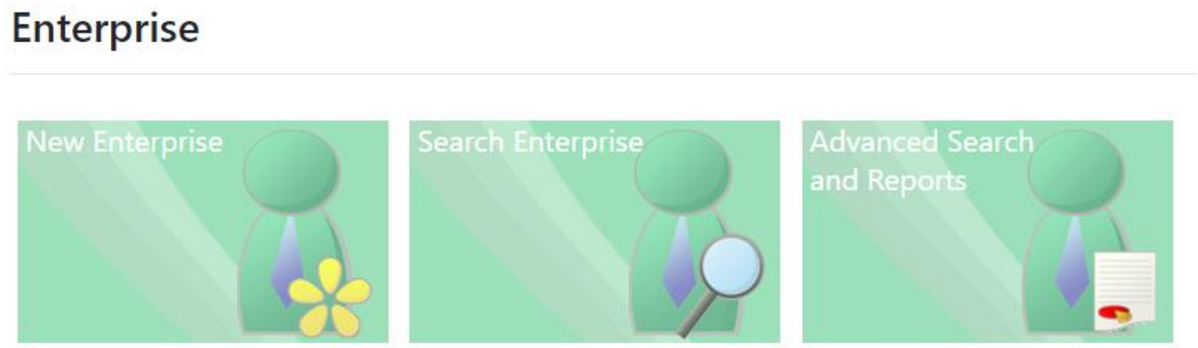
Hanlon
Enterprise Manual

Contents

1.0 Enterprise dashboard and new enterprise

1.1 Enterprise dashboard

When the enterprise option has been selected from the left side of the Hanlon website, a page will be displayed as follows:



1.2 New enterprise

When selecting 'new enterprise' you are directed to a page as follows.

Enterprise Registration Wizard Selection

◉Add New Enterprise ○Edit Existing Enterprise

Registration Form	Home Site	Access Name	Created	
Basic Registration Form	Mental Health Trailblazer	brform	17/08/2011	Select
Business Details	Mental Health Trailblazer	bdts	12/10/2012	Select
Business Registration	Mental Health Trailblazer	basic	30/06/2010	Select
Simple	Mental Health Trailblazer	simple01	02/02/2011	Select

This page shows current registration form wizards that are in use. You are then able to assign a new enterprise to these existing registration forms or edit an existing enterprise by pressing the selection options and then selecting which registration form.If no registration form appears, please contact

◉Add New Enterprise ○Edit Existing Enterprise Select

the support team.

1.2.1 Adding a new enterprise

When adding a new enterprise, the first step is to check if there are any current duplicates. You will need to enter the details of the new enterprise you are wanting to add and then press search. If no duplicates are found, you will be directed to the next stage.

◉ Duplicate check ○ Registration form

Enterprise Name:	Reference:	Address Line 1:	Postcode:	
				Search

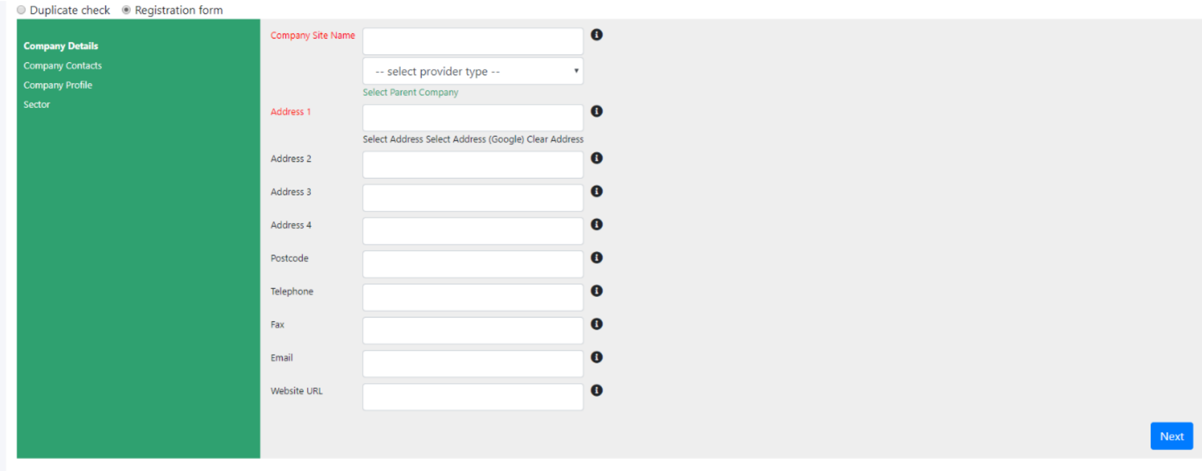
View Data Protection Notes

◉ Show ○ Hide working Enterprise list

Your working enterprise list (0)

You can also skip this stage by ticking the registration form tick box at the top of the screen.

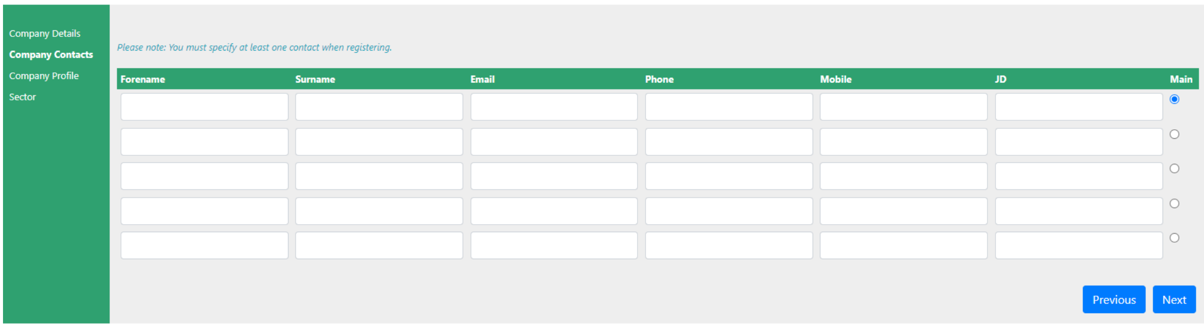
The registration form can be set up with bespoke questions when creating the website. However, as an example of a current wizard already set up, these are the type of questions that would appear.



As you can see above, each section has an i logo attached. This will give further information if the user is confused on what to input. Furthermore, anything labelled in red means the text is mandatory.

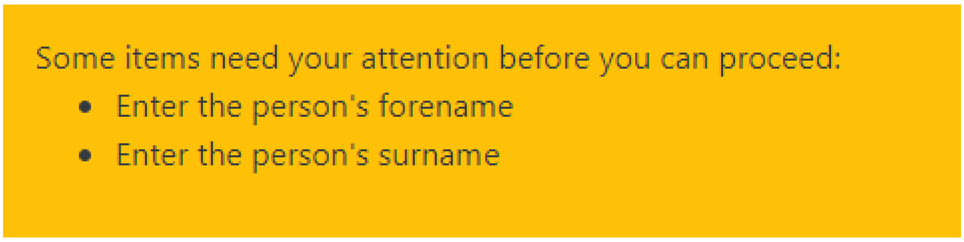
Once the details are submitted, press the blue 'next' button to continue.

For further information, the left section of this table shows you the current stage of the registration you are in. Each time you press the 'next' button you will be progressed to the next heading. This also means if you need to skip to a section or go back, you just need to click the name and it will return you to that page.



The company contacts section is where all contacts related to that enterprise are stored this information is crucial when it comes to posting vacancies etc.

If you have missed any areas where mandatory options are missing, the system will tell you which fields are missing. Such as:

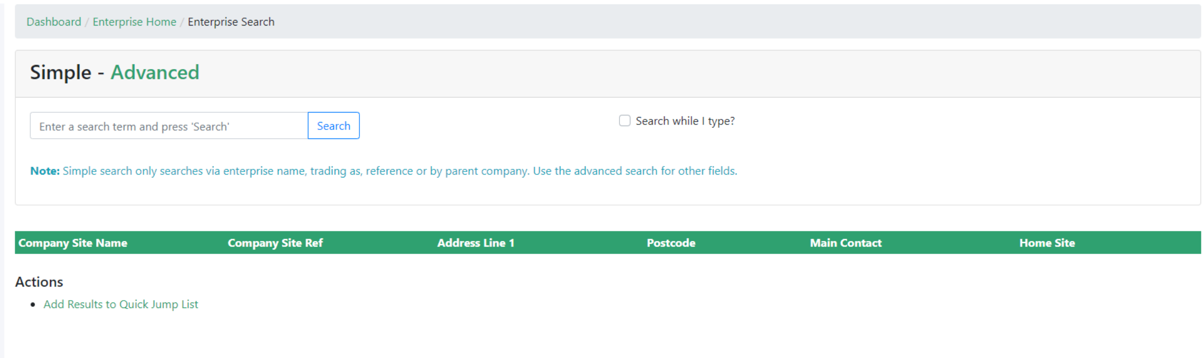


Finally, once all details of the registration are completed, you will finally be given the option after registering to either remain in this wizard to add another enterprise or return to the enterprise home page.

Once selected, press the 'register' button to complete this registration.

2.0 Enterprise search

On the enterprise dashboard, select search enterprise. Enterprise search is used as a way of navigating through existing registered enterprises, to access their account. The enterprise search is a quick way of gathering information on enterprises as you can search for them without inputting data (just press the search button and a list will appear)



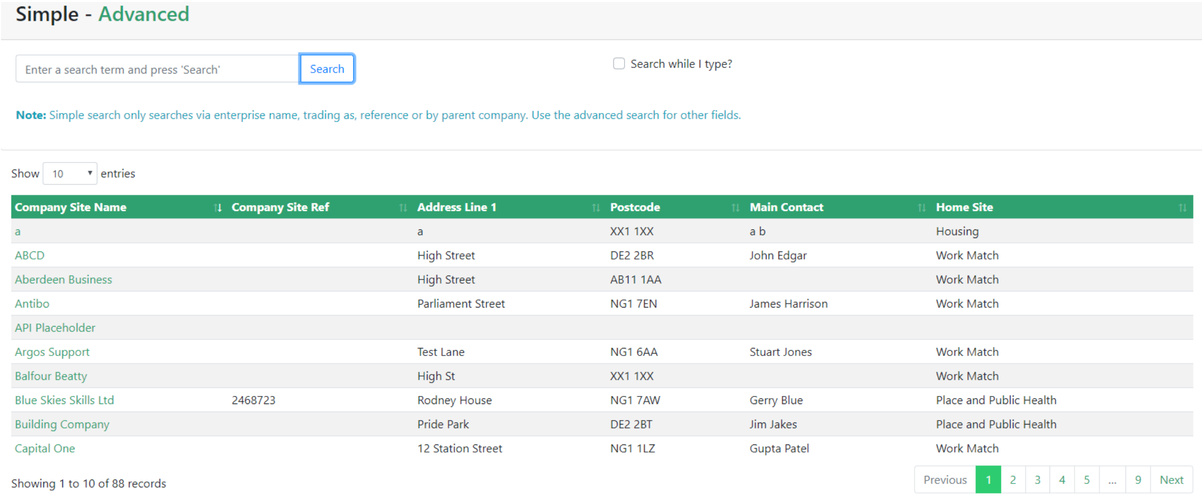
This part of the system is used to locate registered enterprise profiles. When loaded, the page loads as a **simple search**. The mode it is in, will be written in black bold as follows above.

There are several ways to search using this mode:

1. Type in the enterprise company site name, company site reference etc in the search box and click 'search'.
2. If you want to see all registered enterprises, just press the search button and it will display them all. This will be in alphabetical order.
3. Click the **search while I type option** and it will search as you are typing.

Once the chosen enterprise has been found, in the company site name section, the reference will be colored green and clickable. This will then load the enterprises profile. As shown below.

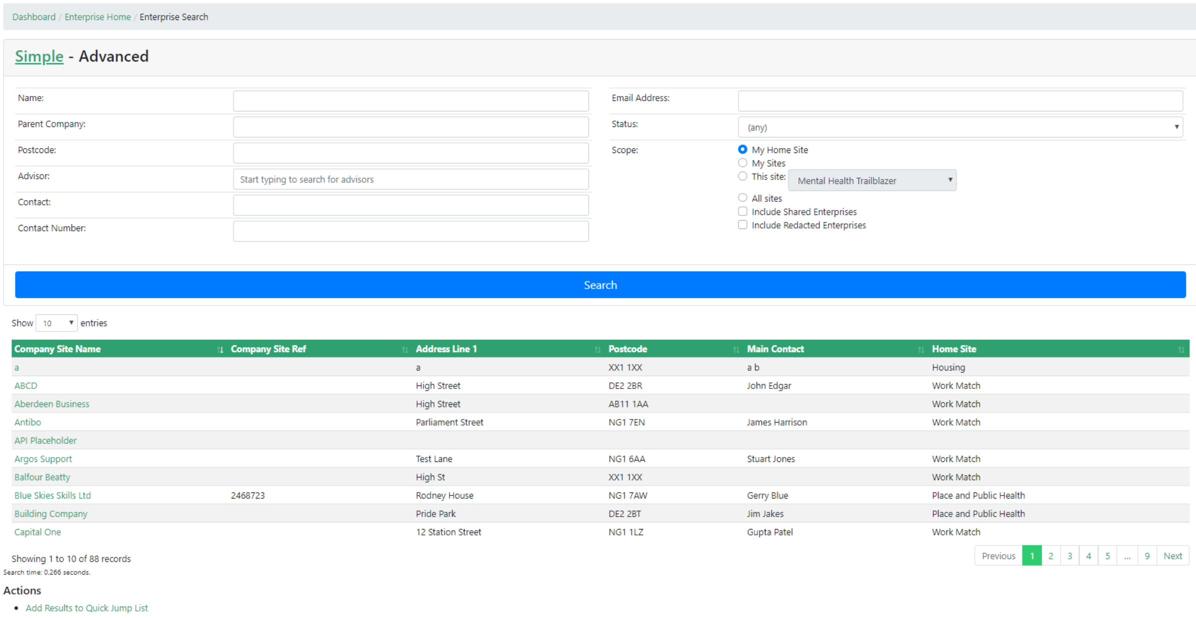
Please note these results can be added to the Quick Jump List (which will be covered in a different section).



Company Site Name	Company Site Ref	Address Line 1	Postcode	Main Contact	Home Site
a		a	XX1 1XX	a b	Housing
ABCD		High Street	DE2 2BR	John Edgar	Work Match
Aberdeen Business		High Street	AB11 1AA		Work Match
Antibo		Parliament Street	NG1 7EN	James Harrison	Work Match
API Placeholder					
Argos Support		Test Lane	NG1 6AA	Stuart Jones	Work Match
Balfour Beatty		High St	XX1 1XX		Work Match
Blue Skies Skills Ltd	2468723	Rodney House	NG1 7AW	Gerry Blue	Place and Public Health
Building Company		Pride Park	DE2 2BT	Jim Jakes	Place and Public Health
Capital One		12 Station Street	NG1 1LZ	Gupta Patel	Work Match

2.1 Advanced enterprise search

If you wish to change to a more advanced search, just click the word and it will to display as follows:



Company Site Name	Company Site Ref	Address Line 1	Postcode	Main Contact	Home Site
a		a	XX1 1XX	a b	Housing
ABCD		High Street	DE2 2BR	John Edgar	Work Match
Aberdeen Business		High Street	AB11 1AA		Work Match
Antibo		Parliament Street	NG1 7EN	James Harrison	Work Match
API Placeholder					
Argos Support		Test Lane	NG1 6AA	Stuart Jones	Work Match
Balfour Beatty		High St	XX1 1XX		Work Match
Blue Skies Skills Ltd	2468723	Rodney House	NG1 7AW	Gerry Blue	Place and Public Health
Building Company		Pride Park	DE2 2BT	Jim Jakes	Place and Public Health
Capital One		12 Station Street	NG1 1LZ	Gupta Patel	Work Match

Within the advanced search screen, you can search with similar categories that the simple search offers but the advanced also allows you to search postcode, advisor, parent company and email address etc. To perform an advanced search, enter the criteria in and click the search button.

The scope section of the advanced search allows the user to search on different sites of the system. 'My home site' searches through enterprises that belong to your home site. 'My sites' searches through all the sites the enterprise has access to. 'This site' will search through the site that is selected in the drop down and finally 'all sites' will search through all sites on the system.

Once you perform your search the system will search through all the sites on the system and you will be presented with the list of enterprises that match your criteria. In your results you will be able to see the enterprises site reference, company site name, address, post code, main contact and homesite. If some of these criteria's have not been recorded, they will appear as blank.

As the same as the simple search, once the chosen enterprise has been found, in the company site name column, the name will be colored green and clickable. This will then load the enterprises profile.

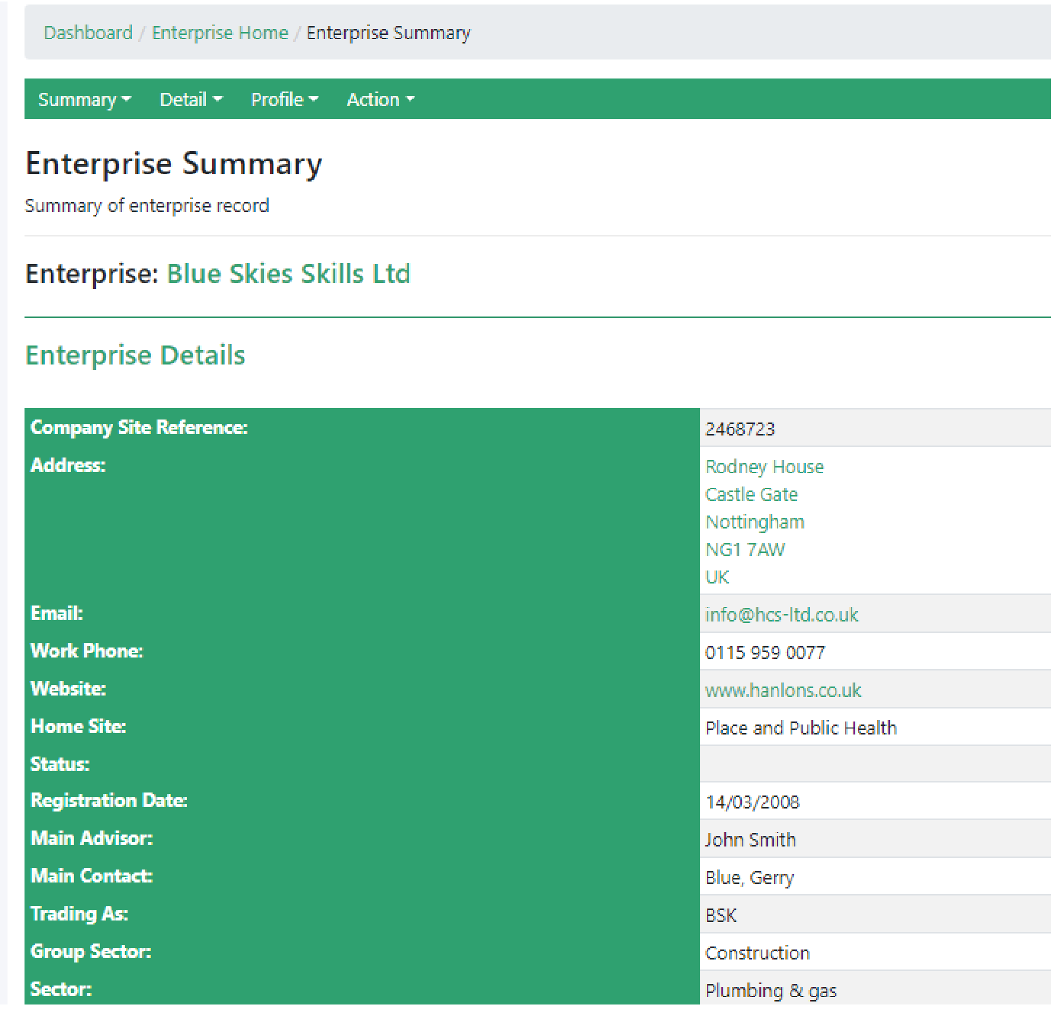
Please note these results can be added to the Quick Jump List (which will be covered in a different section).

2.1 Enterprise summary

The enterprise summary section is an over view of the basic details associated to the enterprise that has been selected in the previous search. All details that have been edited elsewhere in the system will be reflected here, however, the main details about the selected enterprise are in the Enterprise Details sub section. This section allows for a quick glance about the selected enterprise without needing to go further into it.

2.1.1 Enterprise details

The first section on the Enterprise search subcategory bar is summary. Once an enterprise has been selected the page will load with the client's summary details. The enterprise reference/name is given is shown at the top of the enterprise page on each section. The enterprise summary is shown as below:


Dashboard / Enterprise Home / Enterprise Summary

Summary ▾ Detail ▾ Profile ▾ Action ▾

Enterprise Summary

Summary of enterprise record

Enterprise: Blue Skies Skills Ltd

Enterprise Details

Company Site Reference:	2468723
Address:	Rodney House Castle Gate Nottingham NG1 7AW UK
Email:	info@hcs-ltd.co.uk
Work Phone:	0115 959 0077
Website:	www.hanlons.co.uk
Home Site:	Place and Public Health
Status:	
Registration Date:	14/03/2008
Main Advisor:	John Smith
Main Contact:	Blue, Gerry
Trading As:	BSK
Group Sector:	Construction
Sector:	Plumbing & gas

This information is fed from the enterprise registration wizard created from before. Information that is written in green means it is a clickable link. Meaning when the address is selected, you are taken to the Enterprise email manager where email addresses will be pre-set in and you are given the option to 'Record an interaction against each Enterprise emailed'.

3.0 Enterprise details

3.1 Details

Like the enterprise summary page, the enterprises personal details are displayed again. This section however is a longer field with a variety of more personal details. This is the main hub for updating details that will be updated against all over the system. This information is populated through the enterprise registration wizard.

Similar to the enterprise summary page, It also has the same option to directly email, visit the website or view their postcode directly from the green links provided. Furthermore, it also shows business caution again at the bottom of the screen highlighted in purple.

You are also given the option to edit any of these details by pressing the blue 'edit' button at the bottom of this section.

As shown below:

Enterprise: Asda

Details

Company Site Reference:	
Address:	28 Trafalgar Road London NG9 1LB
Parent Company Site:	
E-mail:	support@hanlons.co.uk
Work Phone:	
Fax:	
Website:	
Home Site:	Work Experience Admin
Status:	
Registration Date:	06/07/2022
Main Advisor:	Administrator
Main Contact:	Hanlon, Joe
Trading As:	
Group Sector:	Construction
Sector:	Electrical
Provider Type:	

3.2 Contacts

This section manages the enterprises contact details. As you can see below these are examples of current contacts linked to the enterprise at the moment. You are able to edit a current contact by selecting the blue 'edit' button.

Contacts

Show 10 entries

Search:

Name	Job Description	Email	Mobile	Work Phone	Extension Number	Main	Can Be Contacted	Edit
Gerry Blue	Business Development Manager	gerry@blue.co.uk		0115 959 0077		Yes	Yes	Edit
Joe Hanlon						No	Yes	Edit
Michael Wolff		michael@bluefarms.com	0779 8654			No	Yes	Edit
Rachel Adamson						No	Yes	Edit

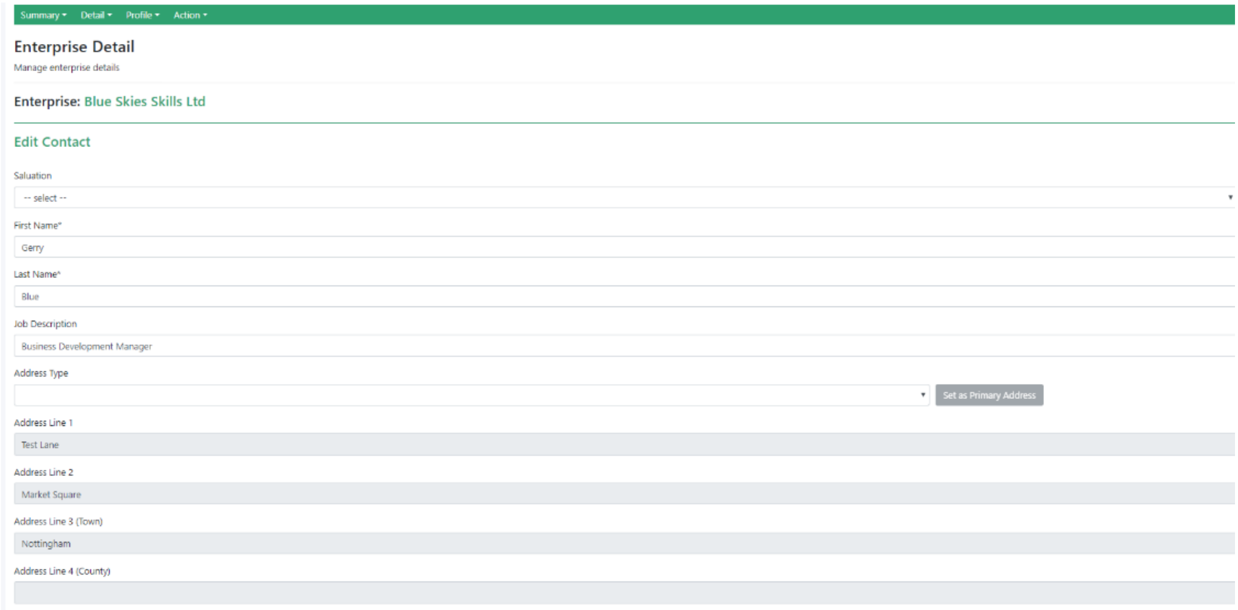
Showing 1 to 4 of 4 entries

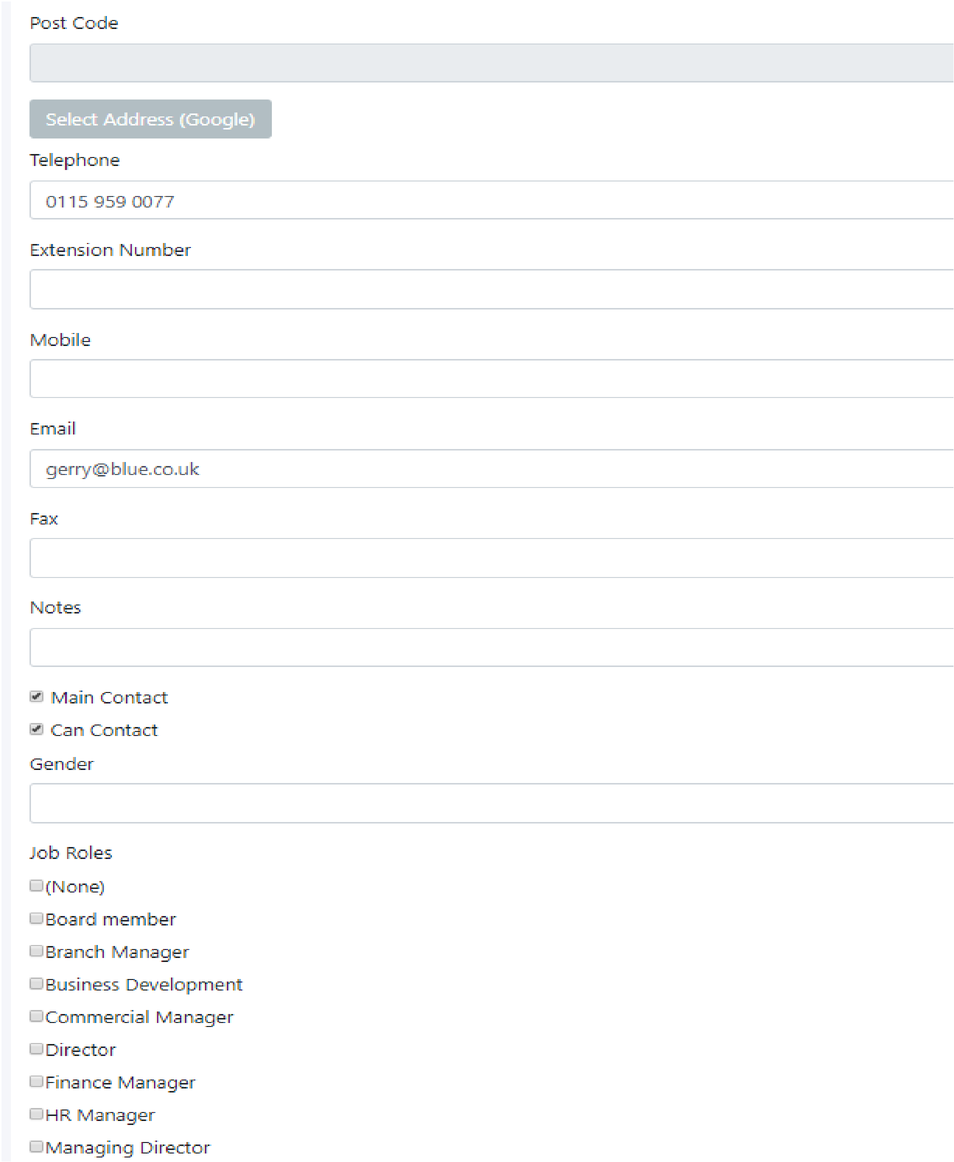
Previous 1 Next

New

To create a new contact, press the blue 'Create Contact button at the bottom of the table.

You will then get a form similar to the edit form as shown below:





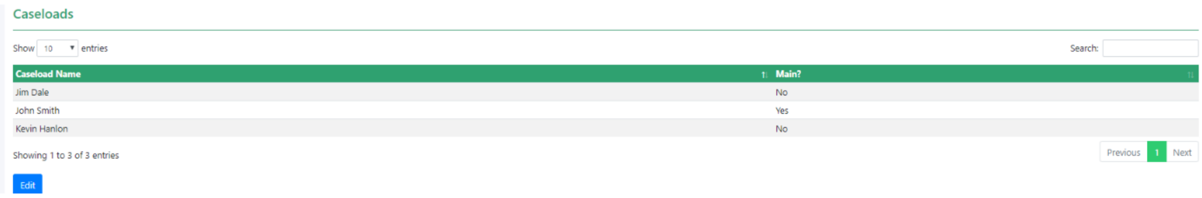
Similar to client fields and registration forms, these questions can be made bespoke when setting up the client wizard. Some can be set as mandatory too. Once completed, press save and this will show in the contact table as displayed above.

3.3 Caseloads

This section deals with caseloads associated to the chosen enterprise.

The table records the name of the caseload and whether it is a main or non-main caseload as shown below:

Main Caseload - This means you are the main person working with this client. You will be the person that is identified as the person to contact if this client is returned in a Duplicate Check.



To **edit** a current caseload, press the blue 'edit' button.

You are not able to edit an existing inputted caseload name; however, you are given the option to change whether it is main or not. Furthermore, you are given the option to delete existing caseload.

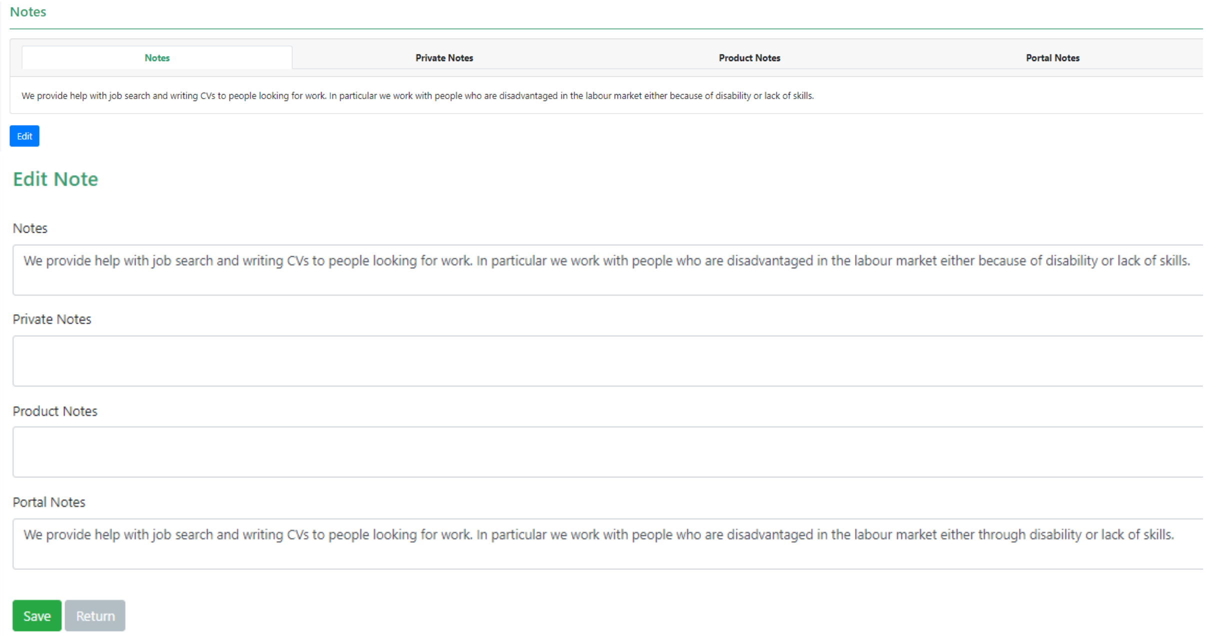
To **add** a caseload, in the text box section, begin typing the name in. You are also given the option to filter caseloads by the Enterprise home location. Once inputted, press the 'add advisor' button.

Please note, that you can input more than one caseload, but you can only have **one main** caseload.

3.4 Notes

The notes section is used to input any further information that was not appropriate to enter anywhere else in he edits sections. These notes can be public and displayed on the profile or they can be private, product notes or portal notes.

To edit a note, press the blue 'edit' button.

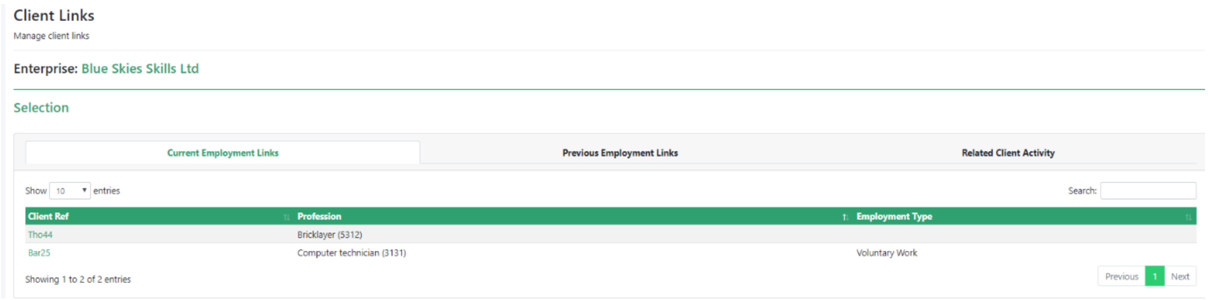


3.5 Client links

This sub section records any current, previous employment links and related client activity.

This allows the enterprise to understand the various links they are associated to. It provides a quick list where client records associated to them can be easily identified and updated upon. This may be useful when looking back at client records and seeing how they have progressed over time, but also a quick way to understand who is under your team and the types of work requested that are most common.

By clicking the green client references, you will be taken to that client's profile summary.



Current and previous employment links will state the start/end dates, the profession and the associated reference.

Whereas related client activity records any activity that a client has had with the enterprise. This can range from email send, group meetings, accident on training etc. It can also determine whether the activity was vacancy, destination or employer related. This information will add more accuracy to a report should it be created.

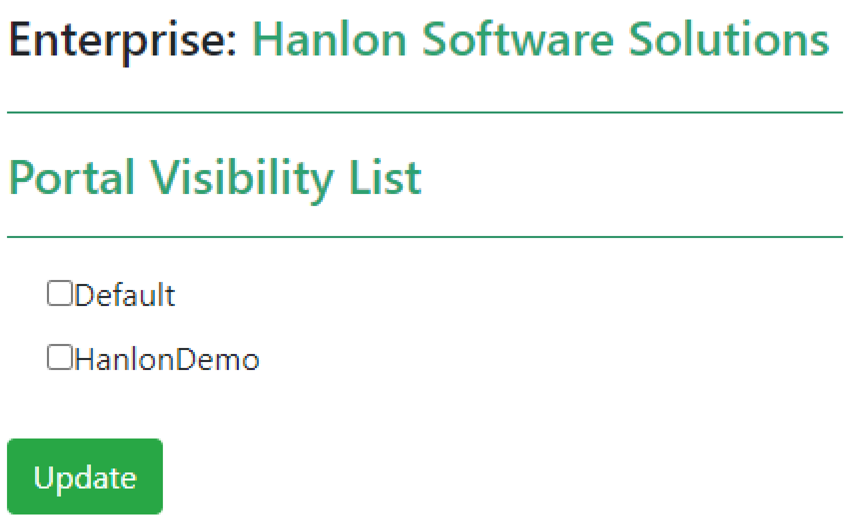
3.6 Portal Visibility List

This sub section is for managing portal visibility of enterprises.

Associated portals that have previously been set up will be set on this page as tick boxes.

This means how the selected enterprise is being displayed on certain portals. More than one portal visibility can be selected. This means that once these options have been selected, these portals associated to the enterprise will be able to see the enterprise portal once selected.

To update this change, please press the update button and a pop up will show it has been successfully updated.

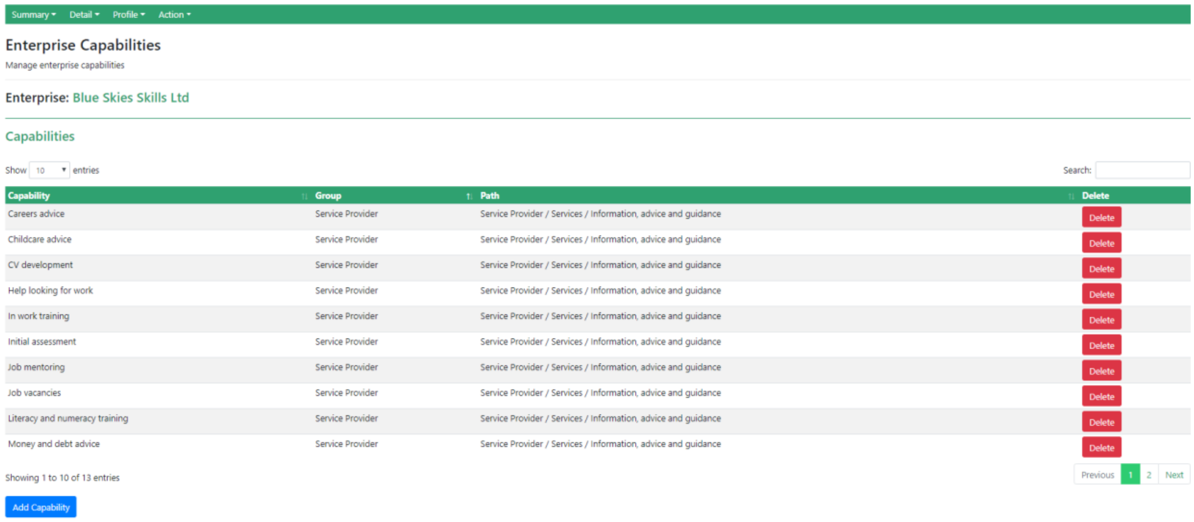


4.0 Enterprise profile

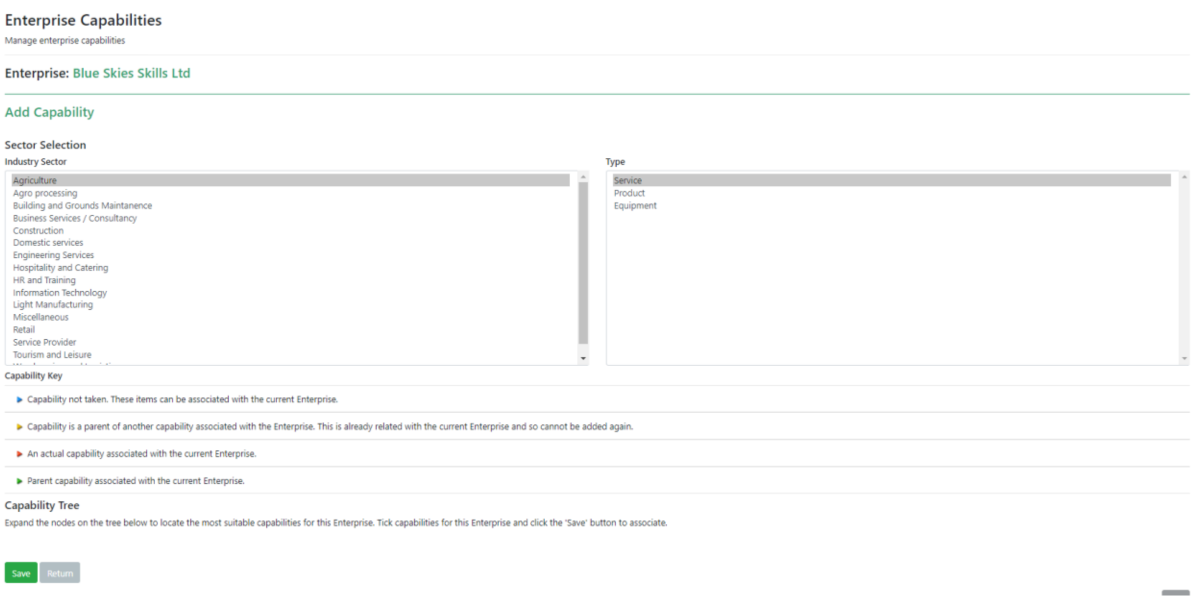
4.1 Enterprise capabilities

The Capabilities section is used to describe what the business can actually do, i.e. what are its products and/or services and what equipment has it got. This sub section allows you to manage the enterprise capabilities section.

Capabilities are important, because they can be used to match the business to market opportunities. Current capabilities that have been recorded are shown as follows below. This records the capability such as job vacancies, cv development, initial assessment etc., group, path and whether you wish to delete the capability.

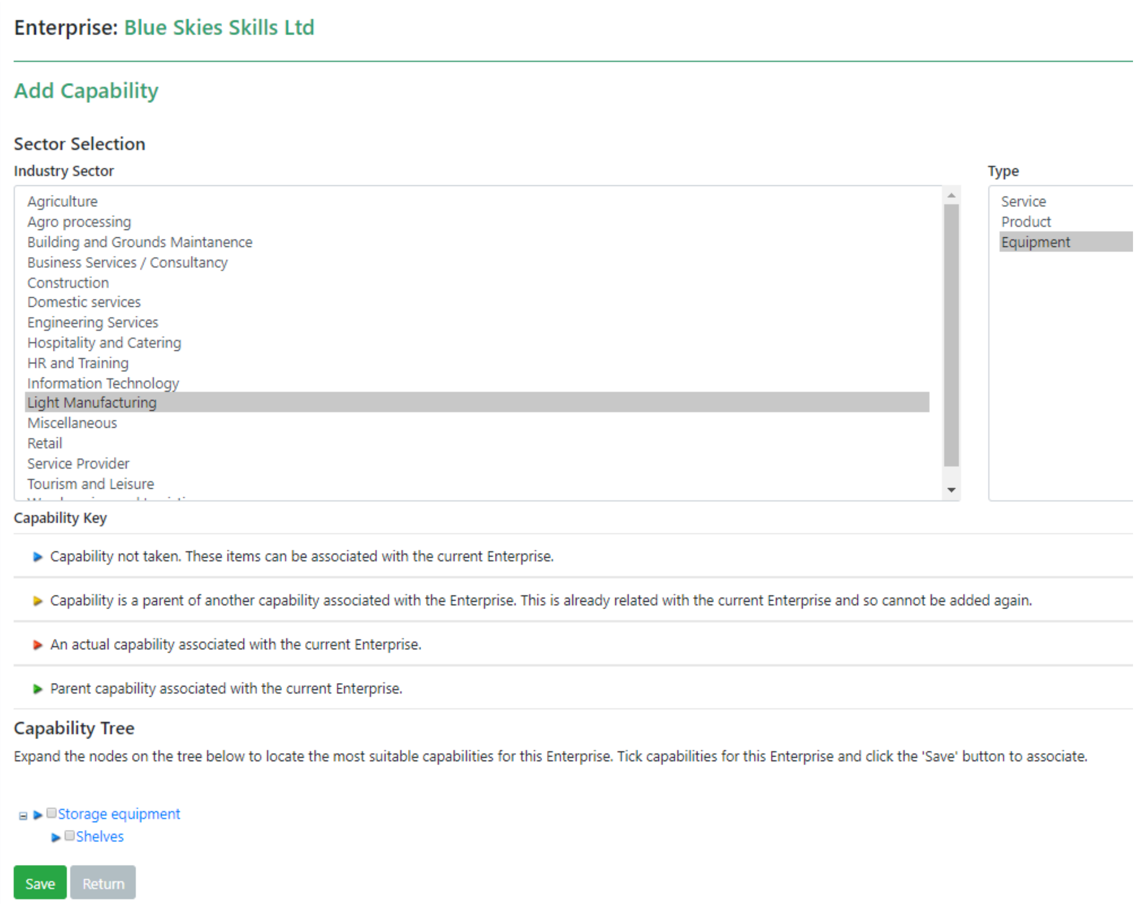


To add a new capability, press the 'add capability' button at the bottom of the screen. This helps to understand what the company does and is included.



Once selected, this will then show something like the example below:

By clicking each of the sectors and types, certain capability trees will be shown underneath matching the key above. For example, by selecting Industry sector - Light manufacturing and type-equipment a blue node tree will appear as follows:



As the nodes are labelled blue, by following the key from above, this means the capability is not taken. These items can be associated with the current enterprise.

Once completed, press save and it will be displayed alongside the other capabilities.

4.2 Enterprise community benefit obligations

This sub section relates to enterprise community benefit obligations. For example, construction types. Community benefit obligations are obligations that the enterprise has been associated with as a form of community benefit (almost like charity obligation). This could range from a new residential area to be constructed or new shopping center construction. These are obligations that will benefit the community.

Enterprise Community Benefit Obligations

View enterprise community benefit obligations

Enterprise: Blue Skies Skills Ltd

Works Site Obligations

Show 10 entries Search:

Works Site	Type	Benefit	Obligation	Data Type	Lead Officer	Status
New Residential Area	Construction	ESP	New Entrant - Modern Apprentice	Value	Billy Connolly	Live
New shopping centre construction AC	Construction	S106 obligations	New Entrant - Job	Value	Administrator	Live
New shopping centre construction AC	Construction	S106 obligations	New Entrant - Modern Apprentice	Value	Administrator	Live
New shopping centre construction AC	Construction	S106 obligations	Work Experience Placement	Value	Administrator	Live
New shopping centre construction AC	Construction	S106 obligations	School Mentoring or Enterprise Programme	Value	Administrator	Live
New shopping centre construction AC	Construction	Work Schedule	Work Experience Placement	Value	Administrator	Live

Showing 1 to 6 of 6 entries Previous 1 Next

By clicking the first left column of the table above (named work sites), these clickable links directly link to any live work sites which will then detail further information about planning, enterprises, notes, benefit schedules etc as follows:

Therefore, this section can allow a quick overview of any current or previous work sites that the selected enterprise is obligated against instead of searching through individual work sites.

When a new work sites has been created through the community benefit section, this table will then therefore update.

Dashboard / Community Benefits / Search Works Sites / Works Site

New shopping centre construction AC

Lifecycle: 01/01/2018 - 30/11/2019

Details | Planning | Enterprises | Benefit Schedule (Enterprise) | Notes | Documents | Activities | Trade Schedule | History | Manage

Details

Date Created:	30/10/2019
Type:	Construction
Status:	Live
Addresss	Parliament Street, Nottingham, NG1 3LZ
Site Contact Name:	Kevin Hanlon
Site Contact Phone:	0115 9590077
Site Contact Email:	info@hcs-ltd.co.uk
Site Contaxt Fax:	0115 8417432
Site Contact Website:	www.hcs-ltd.co.uk
Lead Officer:	Administrator
Contract Date Start:	01/01/2018
Contract Date End:	30/11/2019

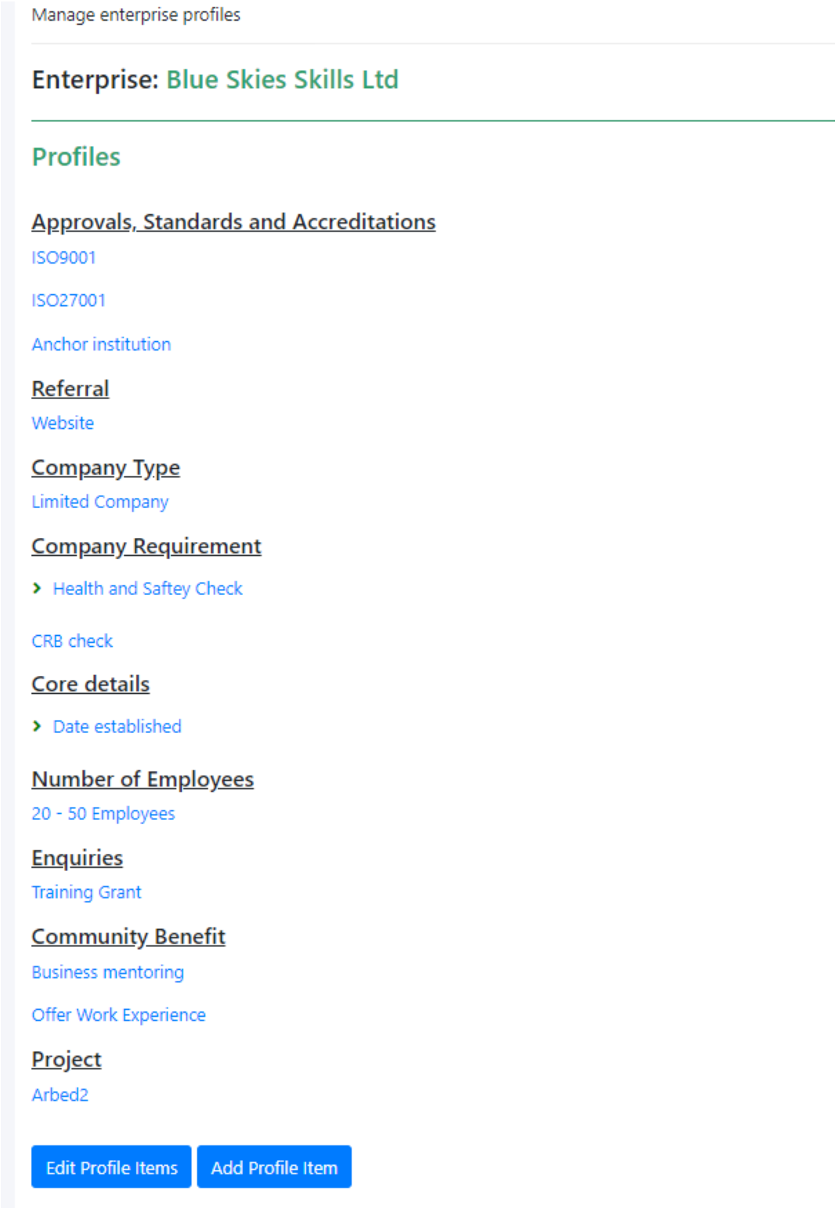
4.3 Profiles

The Profiles section provides a flexible and standardised way of describing the key details of companies.

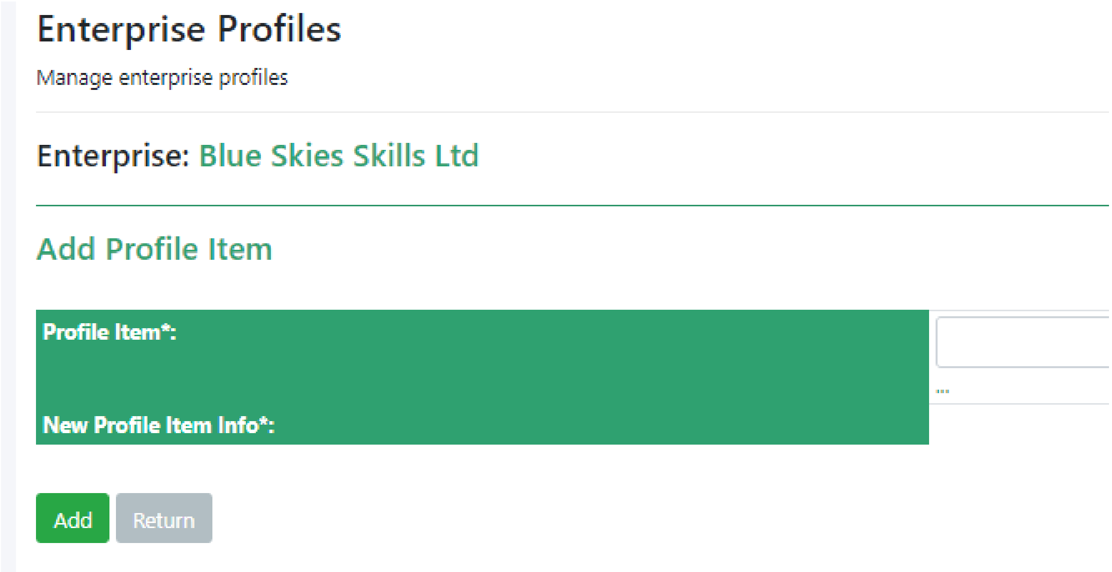
This sub section lists enterprise profiles and profile items the enterprise is associated with.

By default, this section will display all profile items associated with the business unless it is filtered by a group

Some of these profiles are expandable (if they have a green arrow sign). Often stating the date from and date to underneath.



In order to add further profile items. Click the blue 'add profile item' button. This will then give you an add profile item form as follows:



There are two methods to **adding** new profile items.

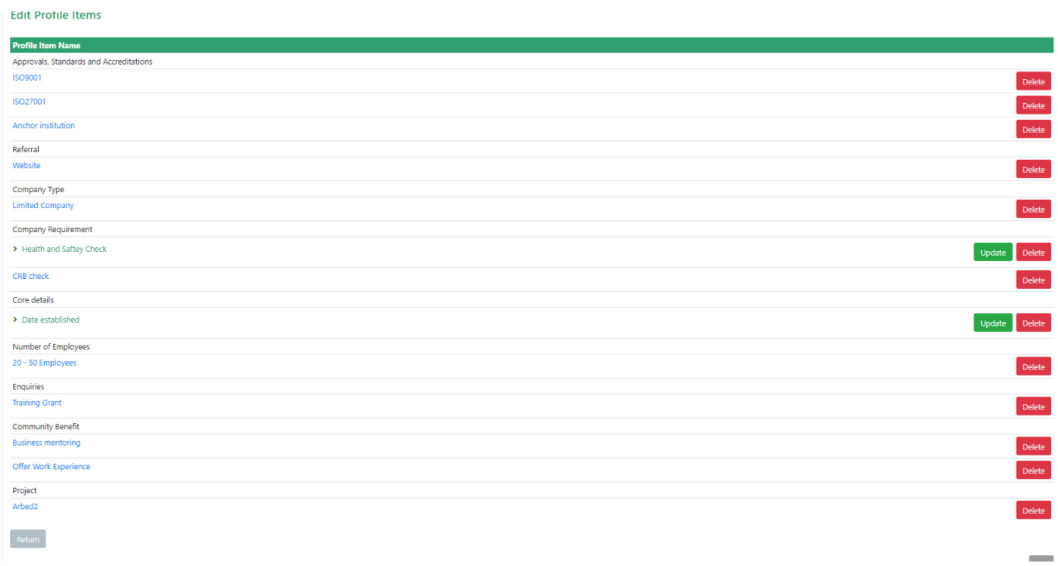
1. Begin typing the name of the profile item you want to add and as you type options will appear based of your search criteria.
2. Click the three dots underneath the text box. This will start a pop-up window that will allow you to select from a drop down of pre-set profile items.

To remove a profile item that has been entered, click the name of it and it will reset.

Once the profile item is selected, the item information will be generated. Once completed, press the 'add' button.

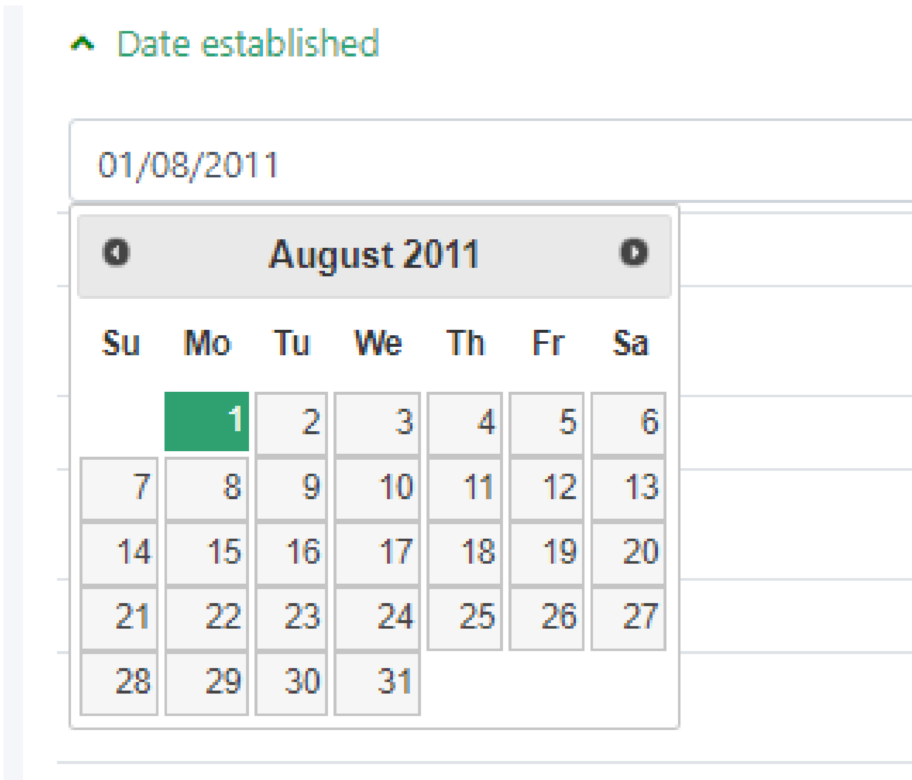
To **edit** the enterprise profiles, press the blue 'edit profile items' on the main dashboard page.

Once selected, a list of the current profile items attached to this enterprise will be shown that will give you the option to 'delete' or 'update' some fields.



The fields you can update are highlighted in green as clickable links. By clicking the green arrow assigned to the names will expand this field. These are often to allow you to change dates on fields. To do this begin to type the updated information or use the calendar option provided.

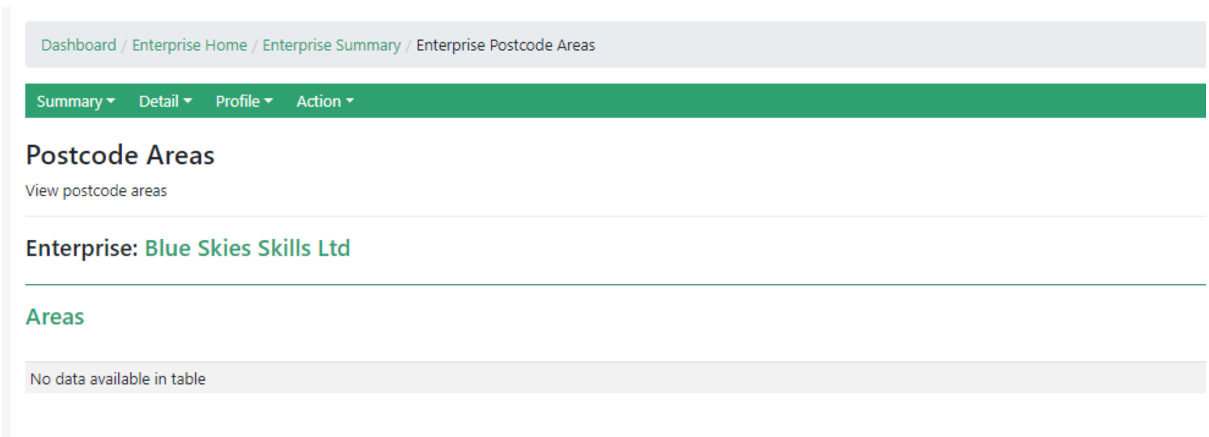
Once updated press the green update button attached to that field and press return at the bottom of the field.



Once this has been done, the updates will be reflected in the profile items home screen as shown above.

4.4 Post code areas

This sub section records any enterprise post code areas that are attached to this enterprise. This can be postcodes that are known as deprived areas. Once registered, these postcodes will then be displayed onto this subsection. Once entered they will be displayed as follows below:

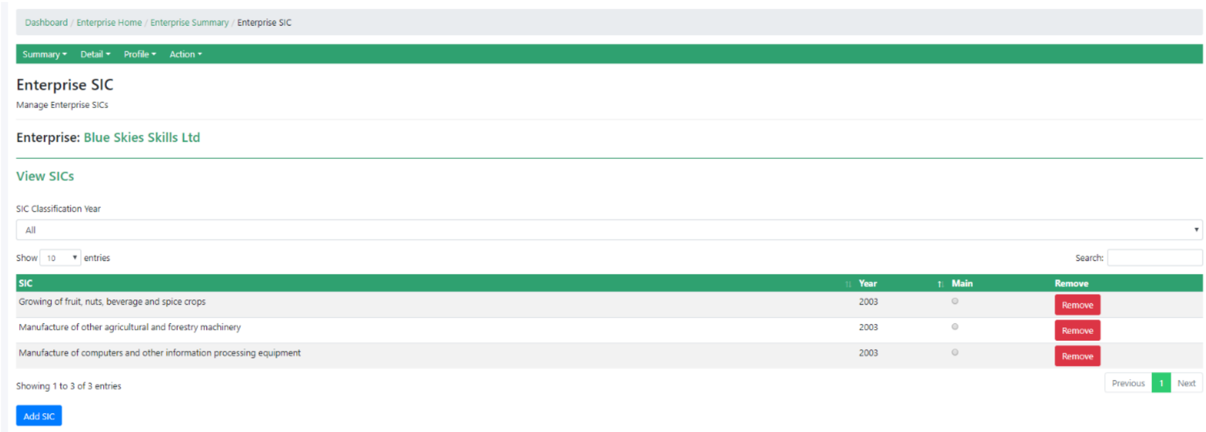


4.5 Enterprise SIC

This subsection manages the enterprises SICs.

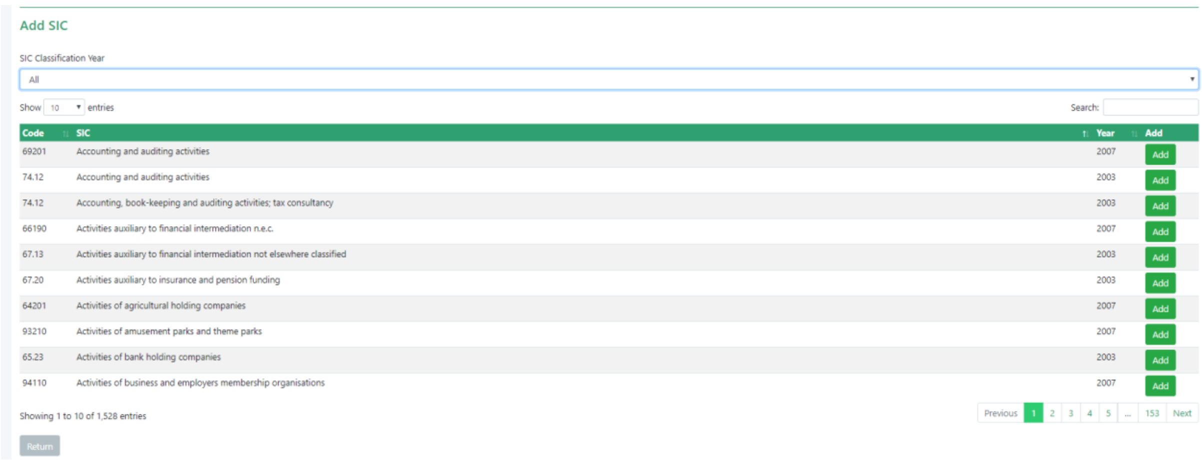
A SIC is a Standard industrial classification, which reveals what the enterprise has to offer. This could range financial sections, accounting, auditing activities etc. It is a standardized description of what the company does, the area and sector that the business is in. You can only select one code as your main SIC code, but you can add as many other codes as you wish.

Some examples as follows below:



As you can see above, the code, SIC and year are recorded in the table above. More than one SIC can be assigned to an enterprise and they can also be removed by clicking the red ‘remove’ button.

To add a SIC to an organization, press the ‘add SIC’ button below. Once selected the following screen will be displayed:

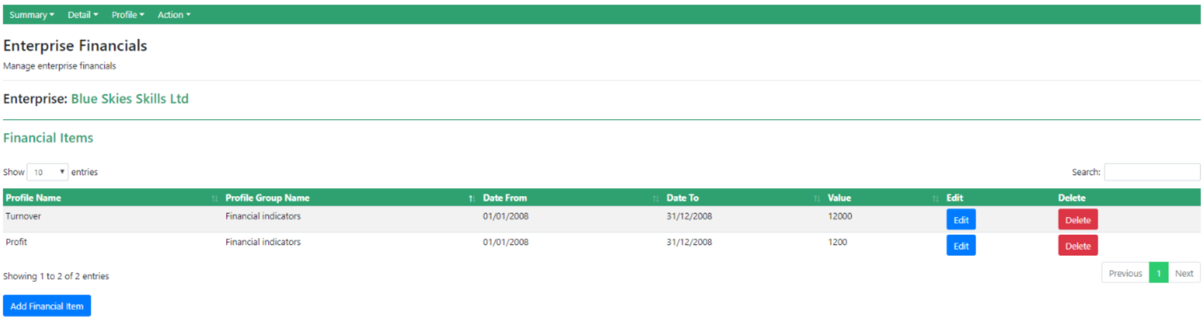


From the top you can choose the SIC Classification year from the drop-down option at the top.

Furthermore, to add one of the following SIC to the selected enterprise, press the green ‘add’ button to the right of the table. Once selected a pop up will appear stating that it is has been added successfully. This will now show on the summary enterprise SIC page.

4.6 Enterprise financials

This sub-section manages the enterprises financials. As shown in the table below, it lists any financial items. This could range from profit from certain sectors, possibly how much a client or site has cost to be successful/unsuccessful. This is a useful summary section to report on current/previous existing financial records.

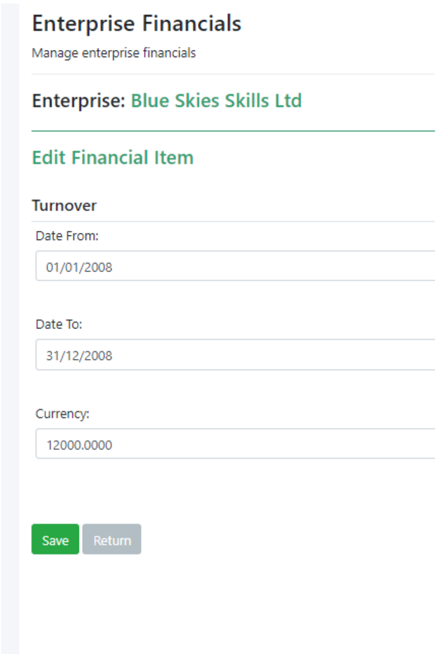


The finance item tables are recording the profile name, profile group name, data from, date to and value. These are editable and can be removed by clicking the associated buttons on the right-hand side of the table.

To **edit** an existing financial item, press the blue ‘edit’ button associated. You will then be shown the following:

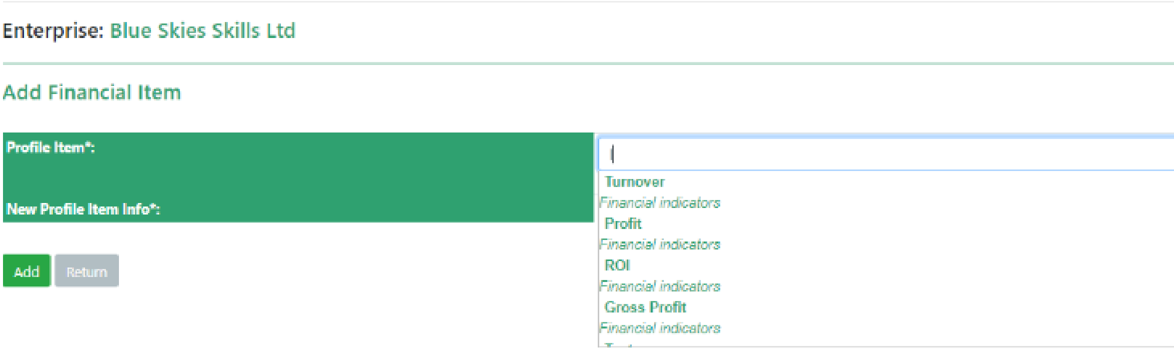
You are then able to edit the date from and date to by using the calendar drop down.

Currency can also be edited by typing the amount in as follows.



Once completed, press the save button and the updates will show in the main table from above.

To add a new financial item, press the ‘add financial item’ button at the bottom of the table. Once done, the following will be displayed:



In the profile item section, begin typing and options will begin to appear that may match. As follows:

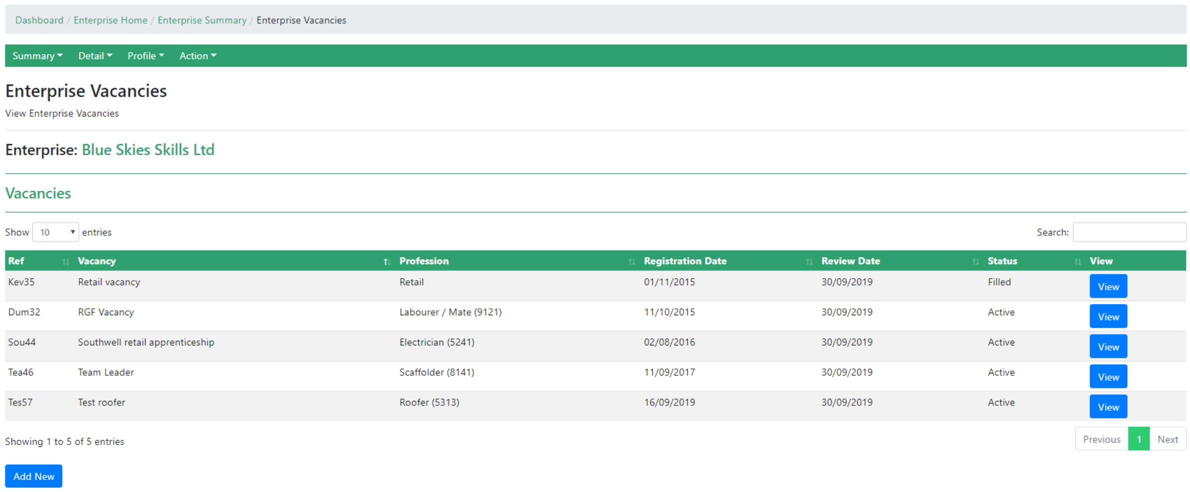
Once selected, ‘date from’, ‘date to’ and ‘currency’ text boxes will appear to finish creating the financial item.

Alternatively, instead of typing in the profile item, if you select the 3 small dots between the text boxes, it will provide a pop-up window of populated profile items to choose from. By clicking the green linked name this will then be added into the profile item text box.

5.0 Enterprise action

5.1 Enterprise vacancies

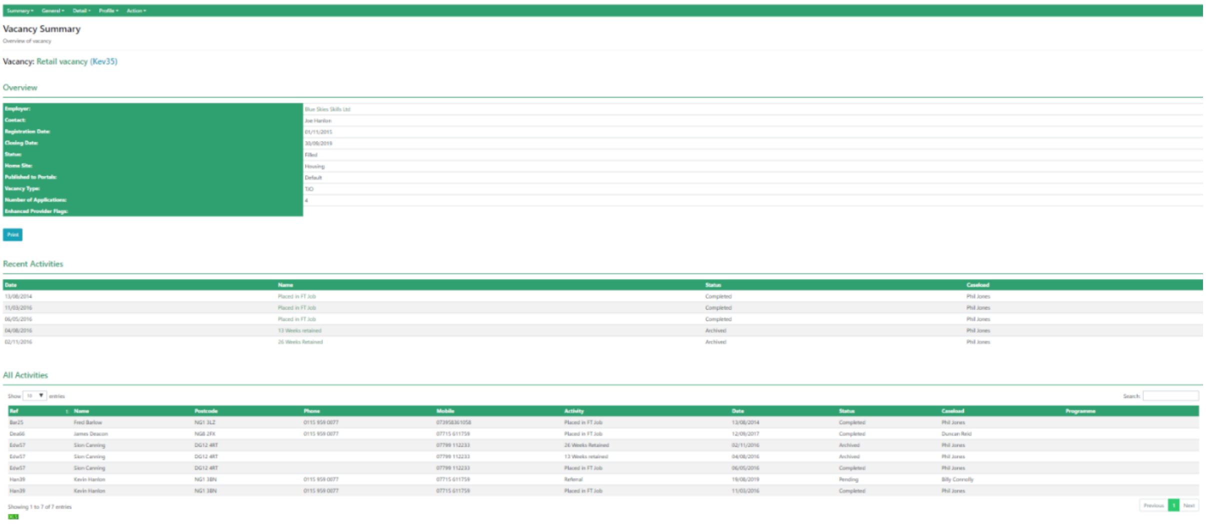
This sub sections list all job vacancies that the selected enterprise is associated with. Enterprise vacancies are available job opportunities for clients. The aim is to help the associated clients into work via these vacancies. It is a useful central way of being able to view how many enterprise vacancies are available and discuss what may interest the client.



This table above will record the vacancy reference, vacancy name, profession, registration date, review date and status. This page is also linked to the vacancy section on the left dashboard menu.

5.1.1 View vacancies

To view a current vacancy registered press the 'view' button the right-hand side. You will then be shown as follows:



This will give you an overview of the vacancy, but also allowing you the option to print this by pressing the 'print' button below the summary.

5.1.2 Recent Activities

In the recent activities section, this will record the date, name, status and caseload of each activity associated with the enterprise/vacancy. As shown below:

Recent Activities

Date	Name	Status	Caseload
13/08/2014	Placed in FT Job	Completed	Phil Jones
11/03/2016	Placed in FT Job	Completed	Phil Jones
06/05/2016	Placed in FT Job	Completed	Phil Jones
04/08/2016	13 Weeks retained	Archived	Phil Jones
02/11/2016	26 Weeks Retained	Archived	Phil Jones

As you can see above, in the name category, the activity names are in green text meaning they are clickable. Once clicked this will direct you back to the client activity section which will also show the enterprise vacancy details on this summary page. This allows for quick access between clients and vacancies.

Client: Fred Barlow (Bar25)

Details

Activity:	Placed in FT Job
Activity Date:	13/08/2014
Activity Time:	12:34
Duration:	0.50
Client Beneficiary Hours:	0.50
Activity Cost:	£950.00
Status:	Completed - View history
Caseload:	Phil Jones
Associated Programme:	
Enterprise:	Blue Skies Skills Ltd
Vacancy:	Retail vacancy
Provider:	Blue Skies Skills Ltd
Actioned By:	Kevin Hanlon
Reminder Alert:	Reminder Alert Not Set
Notes:	
Documents:	Manage Documents
Signed by Client:	Not Signed

Edit | Copy | Print | Delete | Back To Activity List

5.1.3 All activities

This section states all activities that are associated with the enterprise vacancies. This records the reference, name of the client, postcode, phone mobile, activity, date, status, caseload and programme. This section is like the recent activities table but defines all of them.

All Activities

Show 10 entries Search:

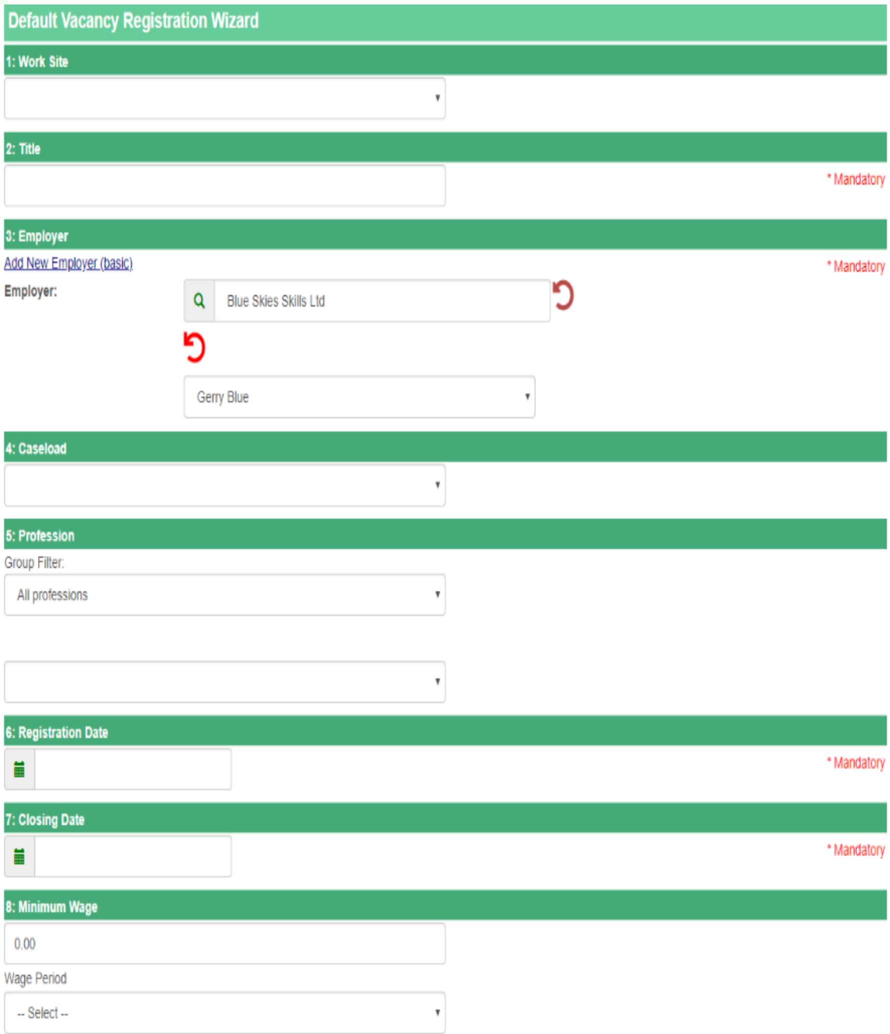
Ref	Name	Postcode	Phone	Mobile	Activity	Date	Status	Caseload	Programme
Bar25	Fred Barlow	NG1 3LZ	0115 959 0077	073958361058	Placed in FT Job	13/08/2014	Completed	Phil Jones	
Dea66	James Deacon	NG8 2FX	0115 959 0077	07715 611759	Placed in FT Job	12/09/2017	Completed	Duncan Reid	
Edw57	Sion Canning	DG12 4RT		07799 112233	26 Weeks Retained	02/11/2016	Archived	Phil Jones	
Edw57	Sion Canning	DG12 4RT		07799 112233	13 Weeks retained	04/08/2016	Archived	Phil Jones	
Edw57	Sion Canning	DG12 4RT		07799 112233	Placed in FT Job	06/05/2016	Completed	Phil Jones	
Han39	Kevin Hanlon	NG1 3BN	0115 959 0077	07715 611759	Referral	19/08/2019	Pending	Billy Connolly	
Han39	Kevin Hanlon	NG1 3BN	0115 959 0077	07715 611759	Placed in FT Job	11/03/2016	Completed	Phil Jones	

Showing 1 to 7 of 7 entries
XLS
Previous 1 Next

You can search for certain activities by using the search bar on the right top corner of the table.

5.1.4 Adding a new enterprise vacancy

To add a new enterprise vacancy, on the main vacancy page, press the 'add new' button under the existing vacancies table. One loaded a vacancy registration form will appear, as an example below.



The 'house' symbol attached to the form is a button that will return you back to the main enterprise vacancy page.

The 'key' symbol attached to the form is a button that will allow you to log out once selected.

This registration form, like the new client and new enterprise forms are very similar.

Any fields with a * after, and often labelled mandatory in red to the right of the field means this field requires input. Meaning you must provide data, or the form will not save.

The red curled arrow symbols under the employer field mean that any data inside the fields can be cleared i.e. deleted.

The rest of the fields are a mix of drop-down selection boxes, calendar selection fields and text boxes. Once all the required fields have been inputted, press the 'save vacancy' button at the bottom of the page.

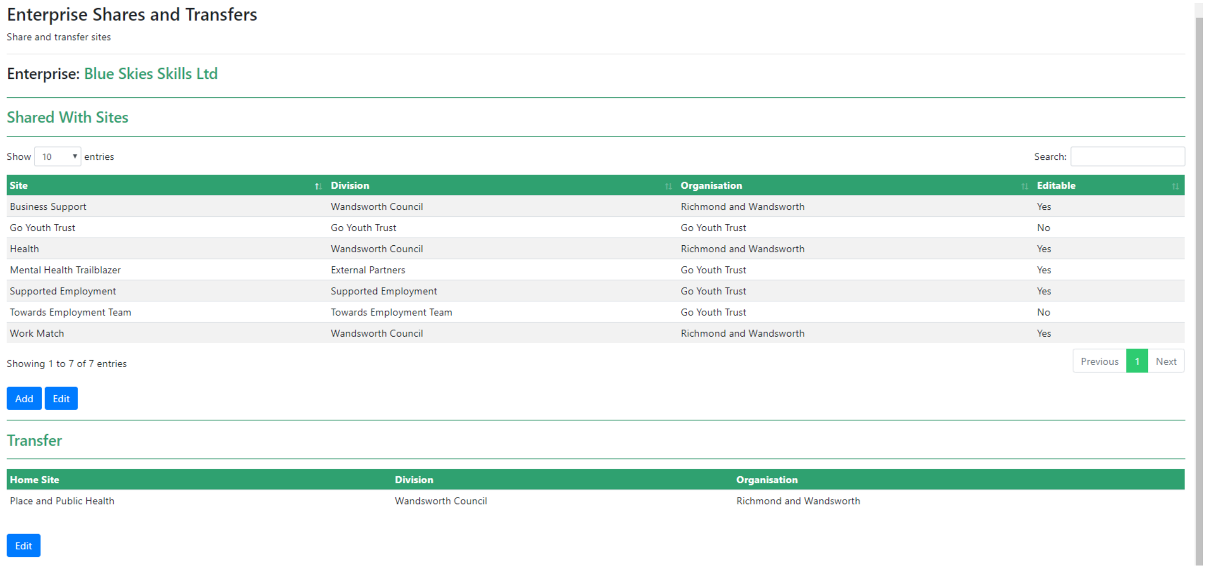
If for any reason you wish to cancel the registration form, press the 'exit without saving' button.

Furthermore, you can also run a duplicate check, by inputting some data into fields such as name, date, postcode etc. and run this check. This will then show if there are any duplicate information already been inputted previously. For example, a vacancy that was already inputted a few days before etc.

5.1 Action – Enterprise shares and transfers

This sub-section records any shared and transferred sites linked to the selected enterprise. This section shows the structural hierarchy of the enterprise. Each enterprise will have various divisions and sites associated. The division (a department of an organisation) will then have associated sites which the client is registered to. These sites may specialise in certain areas such as helping clients that are from deprived areas or clients with disabilities. This section allows the user to understand the shared sites that are associated with the selected enterprise and are able to edit any sites associated with it.

Details on the shared site, division, organisation will be recordable in this table. You are also able to set if these sites are editable. As shown below:



Enterprise Shares and Transfers

Share and transfer sites

Enterprise: Blue Skies Skills Ltd

Shared With Sites

Show 10 entries

Search:

Site	Division	Organisation	Editable
Business Support	Wandsworth Council	Richmond and Wandsworth	Yes
Go Youth Trust	Go Youth Trust	Go Youth Trust	No
Health	Wandsworth Council	Richmond and Wandsworth	Yes
Mental Health Trailblazer	External Partners	Go Youth Trust	Yes
Supported Employment	Supported Employment	Go Youth Trust	Yes
Towards Employment Team	Towards Employment Team	Go Youth Trust	No
Work Match	Wandsworth Council	Richmond and Wandsworth	Yes

Showing 1 to 7 of 7 entries

Previous 1 Next

Add Edit

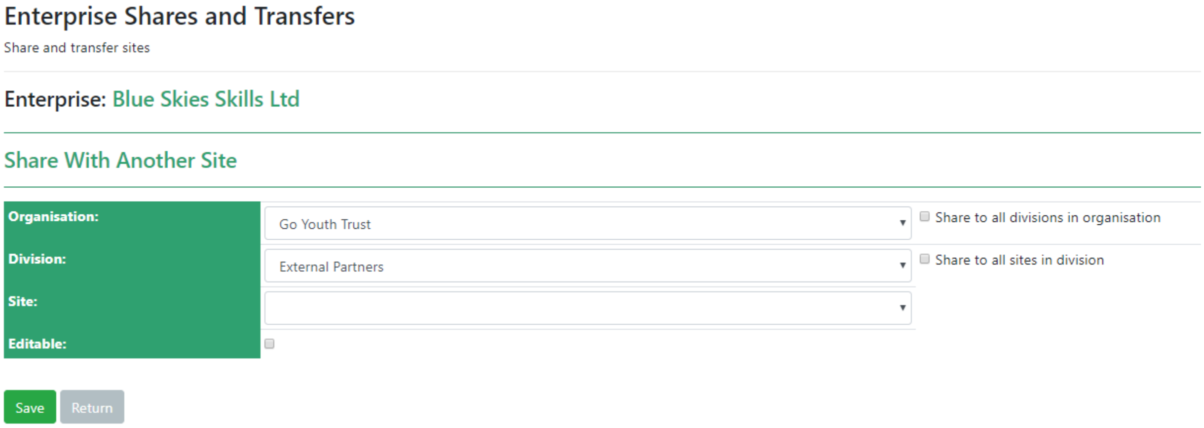
Transfer

Home Site	Division	Organisation
Place and Public Health	Wandsworth Council	Richmond and Wandsworth

Edit

5.21 Shared with sites

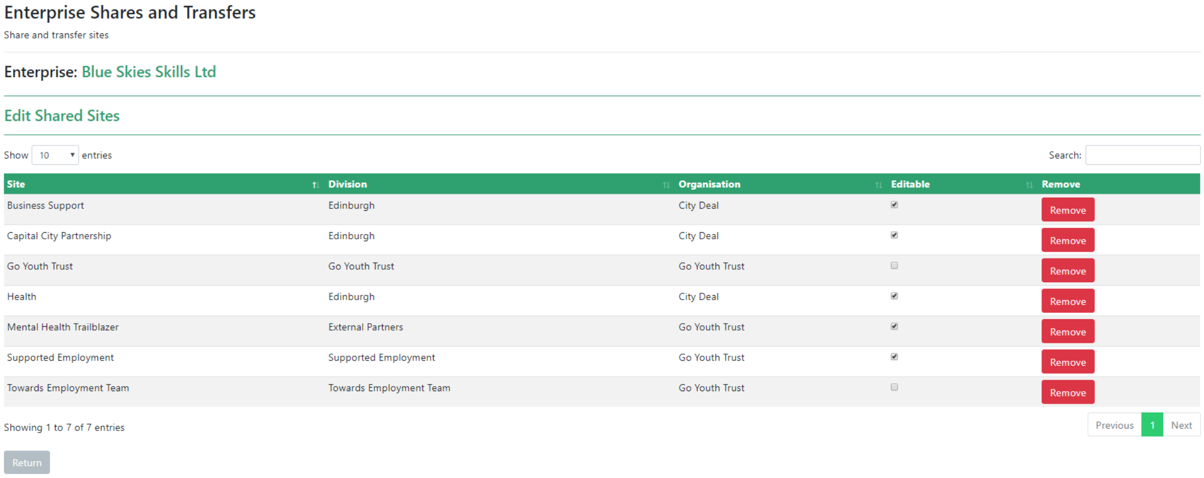
To **add** a new shared site, press the ‘add’ button. You will then be provided with a registration form to set up how to share with another site. As shown below:



To **share an enterprise** with another site, select the organisation, division and site by the drop-down menus. You can then choose to share to all divisions or/and sites by selecting the tick boxes to the right of the drop downs. Furthermore, you are also given the option whether to make this editable by selecting the option at the bottom of the form.

Once completed, press '**save**' and this will be updated in the shared sites table on the main page.

To **edit** a shared enterprise site, press the '**edit**' button. You will then be shown the following:


Enterprise Shares and Transfers
Share and transfer sites
Enterprise: Blue Skies Skills Ltd
Edit Shared Sites
Show 10 entries Search:

Site	Division	Organisation	Editable	Remove
Business Support	Edinburgh	City Deal	☑	Remove
Capital City Partnership	Edinburgh	City Deal	☑	Remove
Go Youth Trust	Go Youth Trust	Go Youth Trust	☐	Remove
Health	Edinburgh	City Deal	☑	Remove
Mental Health Trailblazer	External Partners	Go Youth Trust	☑	Remove
Supported Employment	Supported Employment	Go Youth Trust	☑	Remove
Towards Employment Team	Towards Employment Team	Go Youth Trust	☐	Remove

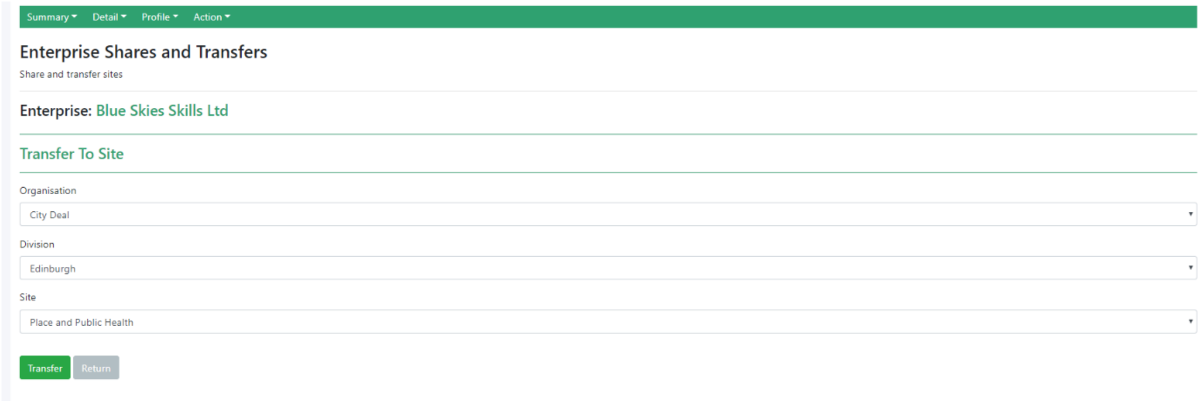
Showing 1 to 7 of 7 entries Previous 1 Next
Return

From the right-hand side of the table you can remove any shared sites, by selecting the 'remove' button. You are also to edit the option of whether a shared site can be editable or not.

This will then be reflected in the main shared sites table on the main page.

5.2.2 Transfer

To edit an existing transfer, press the 'edit' button below the table. Once selected, you will then be shown the following page:

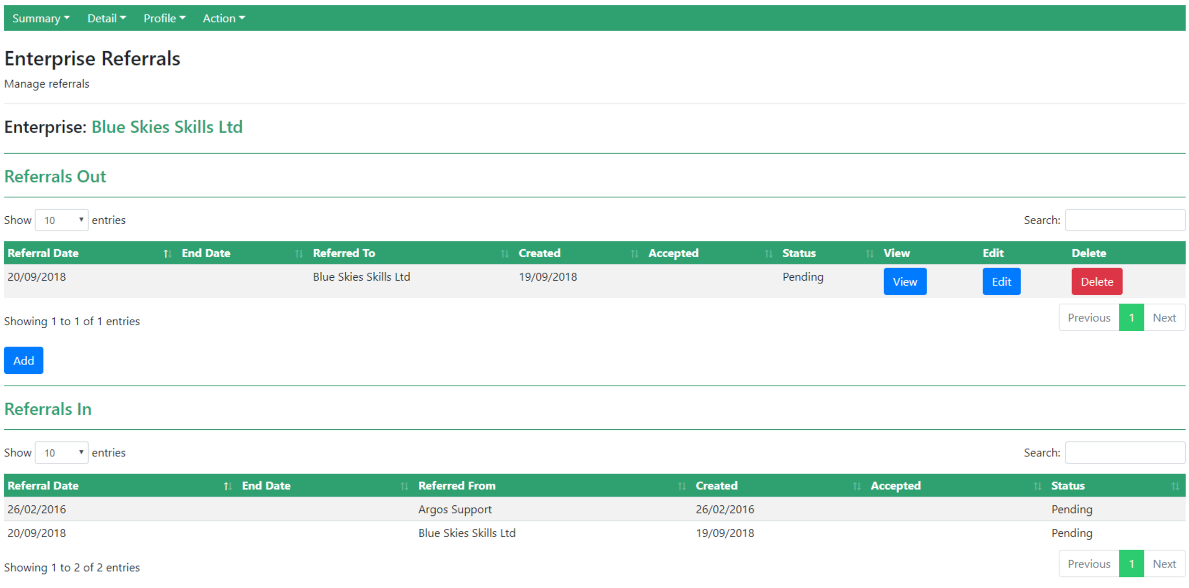


By using the drop-down options, you will then be able to change the organisation, division and site options. These are the fields you want your chosen enterprise site to be transferred to.

Once the fields are completed, press the transfer button. This change will then be reflected on the transfer table on the main enterprise share/transfer page.

5.3 Enterprise referrals

This sub-section allows you to manage the enterprises referrals. This allows you to refer the associated enterprise with other providers. These providers are still linked to the current enterprise. Therefore, a useful way of being able to access all resources from across all sites/divisions and associated businesses. This sub section will also give you an overall summary of the referrals coming in and out of the enterprise. Therefore, creating a full record.



As you can see above these are separated into referrals out and referrals in.

5.3.1 Referrals out

The referrals out section, records the referral date, end date, referred to (which enterprise), created, accepted, status. You are also able to view, edit and delete a referral.

Enterprise Referral Details

Manage enterprise referral

Enterprise: Blue Skies Skills Ltd

Referral Details

Referred Enterprise:	Blue Skies Skills Ltd
Referral Date:	20/09/2018
To Enterprise:	Blue Skies Skills Ltd
To Caseload:	Kevin Hanlon
Referral Reason:	Finance advice
Status:	Pending
Created Date:	19/09/2018
Notes:	

By pressing the 'view' button you will get an overview of the out referral recorded. It will often look like this example:

To edit an existing out referral, press the edit button. You will then get the following registration form with pre-existing data entered.

These fields can be edited through text and drop-down menus. Some of these fields will be mandatory (they will have an * by the name). You also have the option to make the referral share read only. Once completed press the 'update' button and the information will be updated in the main table above.

When adding a new referral out, press the 'add' button the on the main enterprise referral page.

You will be then given the exact same document as the 'edit referral page' but just blank. Ensure all mandatory fields are filled in and press the 'save' button.

Enterprise Referrals

Manage referrals

Enterprise: Blue Skies Skills Ltd

Edit Referral

Referral Date *
20/09/2018

Referral From Company
Antibo

Referral From Caseload *
Angela Spence

Referral to provider *
Blue Skies Skills Ltd

Referral to caseload *
Kevin Hanlon

Reason Group
Support and advice

Reason *
Finance advice

End Date

Notes

Share read only?

Update Return

5.3.2 Referrals in

When a new referral has been added, as in the example above, it will be automatically populated in the referral in section. This will then set the status to 'pending' as it is waiting to be reviewed. Once it has been accepted, it will be notified in the referral in 'accepted' column. This table will also record the referrals date, end date, referred from, when it was created.

Referrals In

Show 10 entries Search:

Referral Date	End Date	Referred From	Created	Accepted	Status
26/02/2016		Argos Support	26/02/2016		Pending
20/09/2018		Blue Skies Skills Ltd	19/09/2018		Pending
13/11/2019		Blue Skies Skills Ltd	05/11/2019		Pending

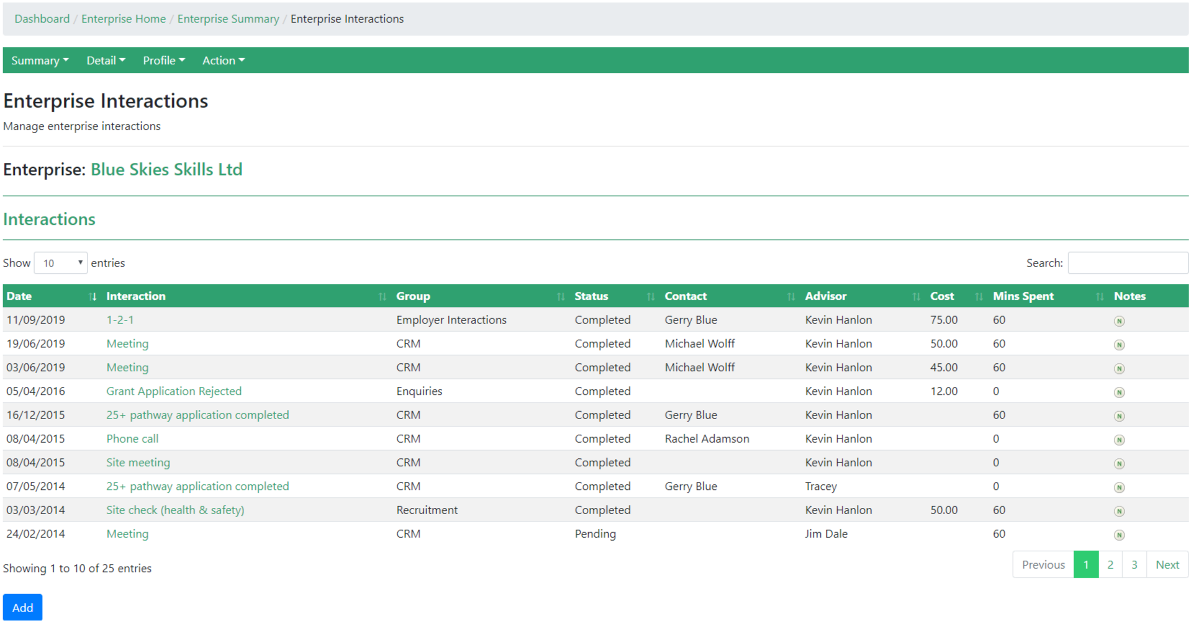
Showing 1 to 3 of 3 entries

Previous 1 Next

5.4 Enterprise Interactions

The Interactions section records details of any activities that you have conducted with the business. These could range from phone calls and meetings to workshops and training events. This is so the enterprise can keep track of the progress an associated clients progress and has records of interactions completed.

This sub-section records any interactions the enterprise is associated with.



Dashboard / Enterprise Home / Enterprise Summary / Enterprise Interactions

Summary ▾ Detail ▾ Profile ▾ Action ▾

Enterprise Interactions

Manage enterprise interactions

Enterprise: Blue Skies Skills Ltd

Interactions

Show 10 entries Search:

Date	Interaction	Group	Status	Contact	Advisor	Cost	Mins Spent	Notes
11/09/2019	1-2-1	Employer Interactions	Completed	Gerry Blue	Kevin Hanlon	75.00	60	
19/06/2019	Meeting	CRM	Completed	Michael Wolff	Kevin Hanlon	50.00	60	
03/06/2019	Meeting	CRM	Completed	Michael Wolff	Kevin Hanlon	45.00	60	
05/04/2016	Grant Application Rejected	Enquiries	Completed		Kevin Hanlon	12.00	0	
16/12/2015	25+ pathway application completed	CRM	Completed	Gerry Blue	Kevin Hanlon		60	
08/04/2015	Phone call	CRM	Completed	Rachel Adamson	Kevin Hanlon		0	
08/04/2015	Site meeting	CRM	Completed		Kevin Hanlon		0	
07/05/2014	25+ pathway application completed	CRM	Completed	Gerry Blue	Tracey		0	
03/03/2014	Site check (health & safety)	Recruitment	Completed		Kevin Hanlon	50.00	60	
24/02/2014	Meeting	CRM	Pending		Jim Dale		60	

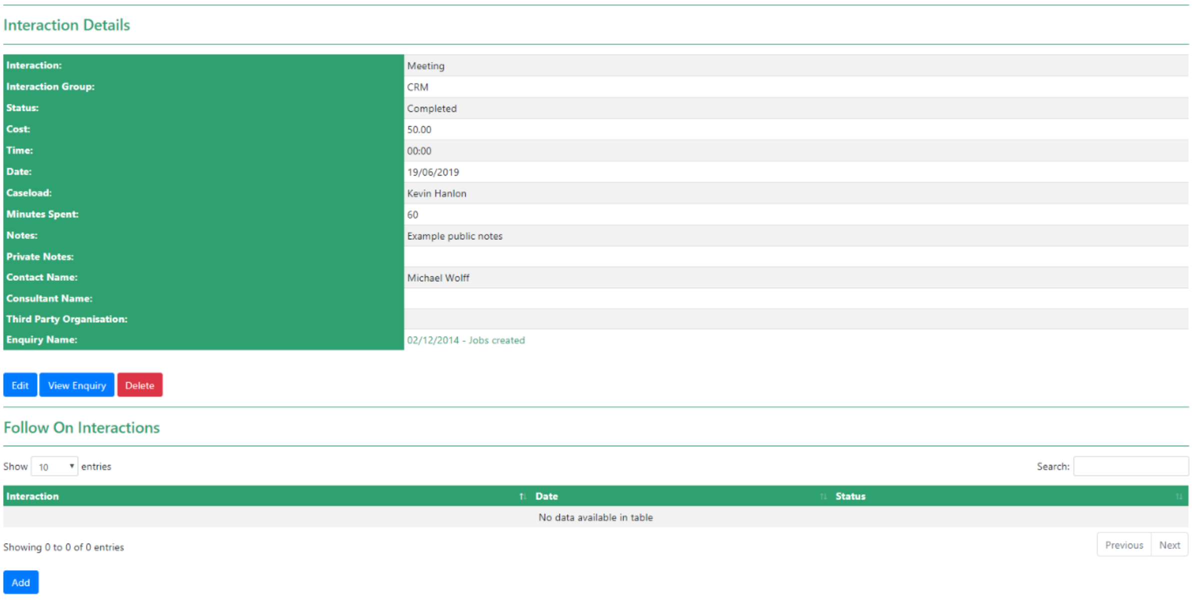
Showing 1 to 10 of 25 entries

Previous 1 2 3 Next

Add

The table above records the date, interaction, group, status, contact ,advisor, cost minutes spent and any further notes about the interaction.

An enterprise can have more than one interaction associated.



Interaction Details

Interaction:	Meeting
Interaction Group:	CRM
Status:	Completed
Cost:	50.00
Time:	00:00
Date:	19/06/2019
Caseload:	Kevin Hanlon
Minutes Spent:	60
Notes:	Example public notes
Private Notes:	
Contact Name:	Michael Wolff
Consultant Name:	
Third Party Organisation:	
Enquiry Name:	02/12/2014 - Jobs created

Edit View Enquiry Delete

Follow On Interactions

Show 10 entries Search:

Interaction	Date	Status
No data available in table		

Showing 0 to 0 of 0 entries

Previous Next

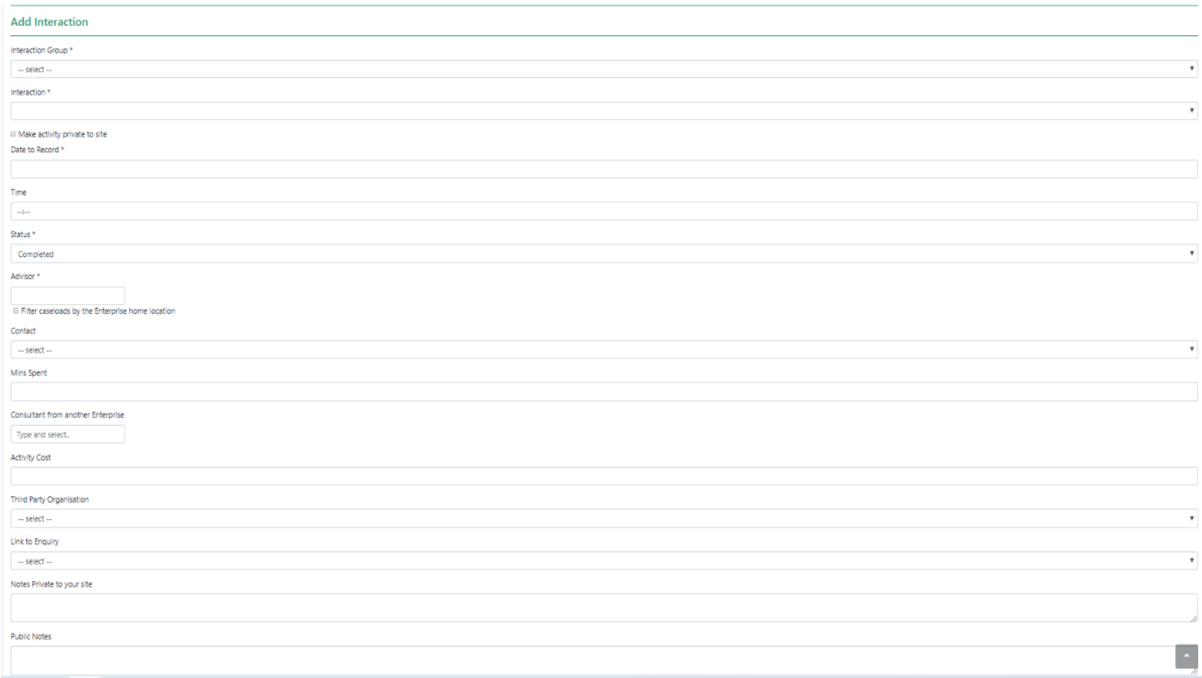
Add

In the interaction section, the names are highlighted green as clickable links. This means, once selected, you will be given an overview of that interaction. This will then give you the option to edit or delete this interaction.

Furthermore you can assign follow on interactions to this interaction by selecting the blue ‘add’ button.

This saves time moving through pages and adding new interactions on.

To **add** a new interaction, press the blue ‘add’ button at the bottom of the main enterprise interaction screen.



This form is similar to the edit form from before. All * requires information as they are mandatory fields.

You also have the option to tick the ‘Make activity private to site’.

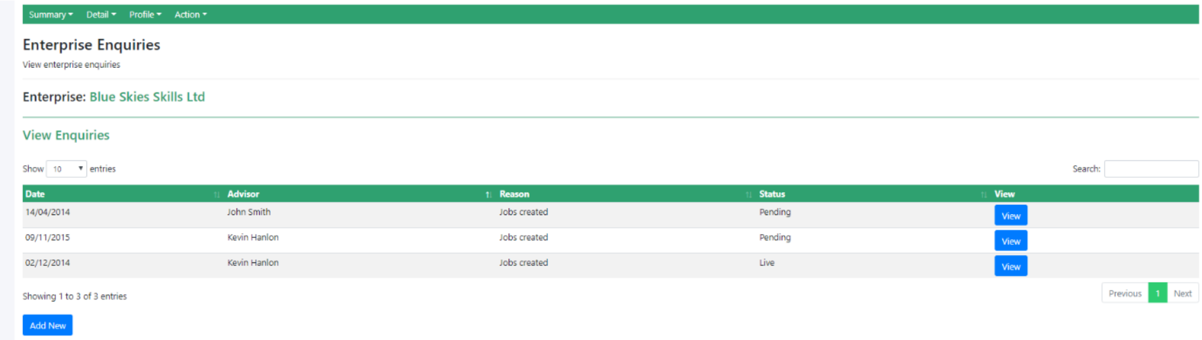
The fields are majority text input boxes, however some are drop downs. On the ‘advisor’ field, you are also given the option whether you wish to filter caseloads by the Enterprise Home location’.

‘Notes Private to your site’ are notes yo uwish to make about the interaction that you do not want the client to see. This may be to do with any barriers or anything that may require warning such as behavioural issues.

Once all the fields are completed, press the green ‘save’ button at the bottom of the page. This information will then be populated into the main Enterprise interaction table.

5.5 Enterprise Enquiries

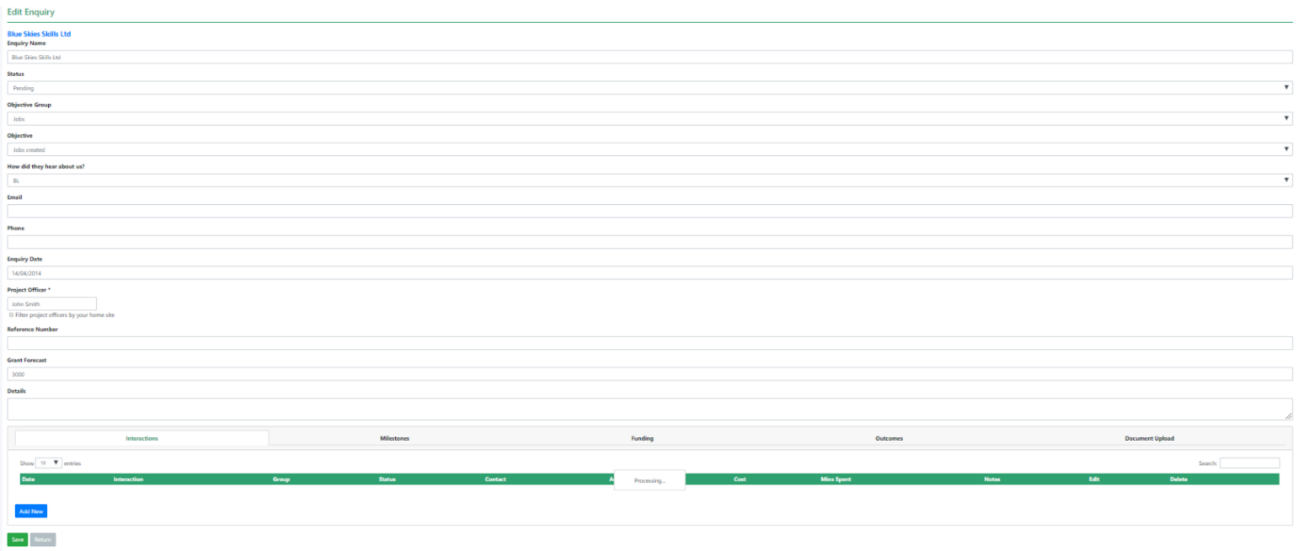
This sub section records any enquiries associated to the selected enterprise. These enquiries are written towards the enterprise. The enquiries can range from enquiring about a grant or support. Enquires can be sent before an enterprise has been set up. Once an enterprise has been set up the enquiry can then be linked. You will then be able to track this through enterprise milestones actions, etc. The date, advisor, reason and status of an enquiry are recorded as follows below.



You are also able to **view** an existing enquiry by pressing the blue 'View' button on the table. By selecting this option, you will then be able to **edit the existing enquiry** too. An example of an editable enquiry is as follows:

This will then allow you to change certain details such as changing the status from pending to live or the ' how did you hear about us' section from BL to word of mouth etc.

Any fields with an *** are mandatory fields**, meaning they need to be filled it. For example, a Project Officer needs to be filled in. On this field you also have the option to 'Filter project officers by your home site' by ticking the option.



The table section at the bottom below the ‘details’ field allows you to switch between the interaction, milestones, funding, outcomes and document upload tables. This gives you quick access to add new fields into these sections that are associated to this enquiry. This saves you time going backwards and forwards between pages. Once the enquiry has been updated, press the green ‘save’ button at the bottom of the page. This will then update the table on the main enterprise enquiry page.

To **add** a new enquiry, click the ‘Add New’ button on the main enterprise enquires homepage.

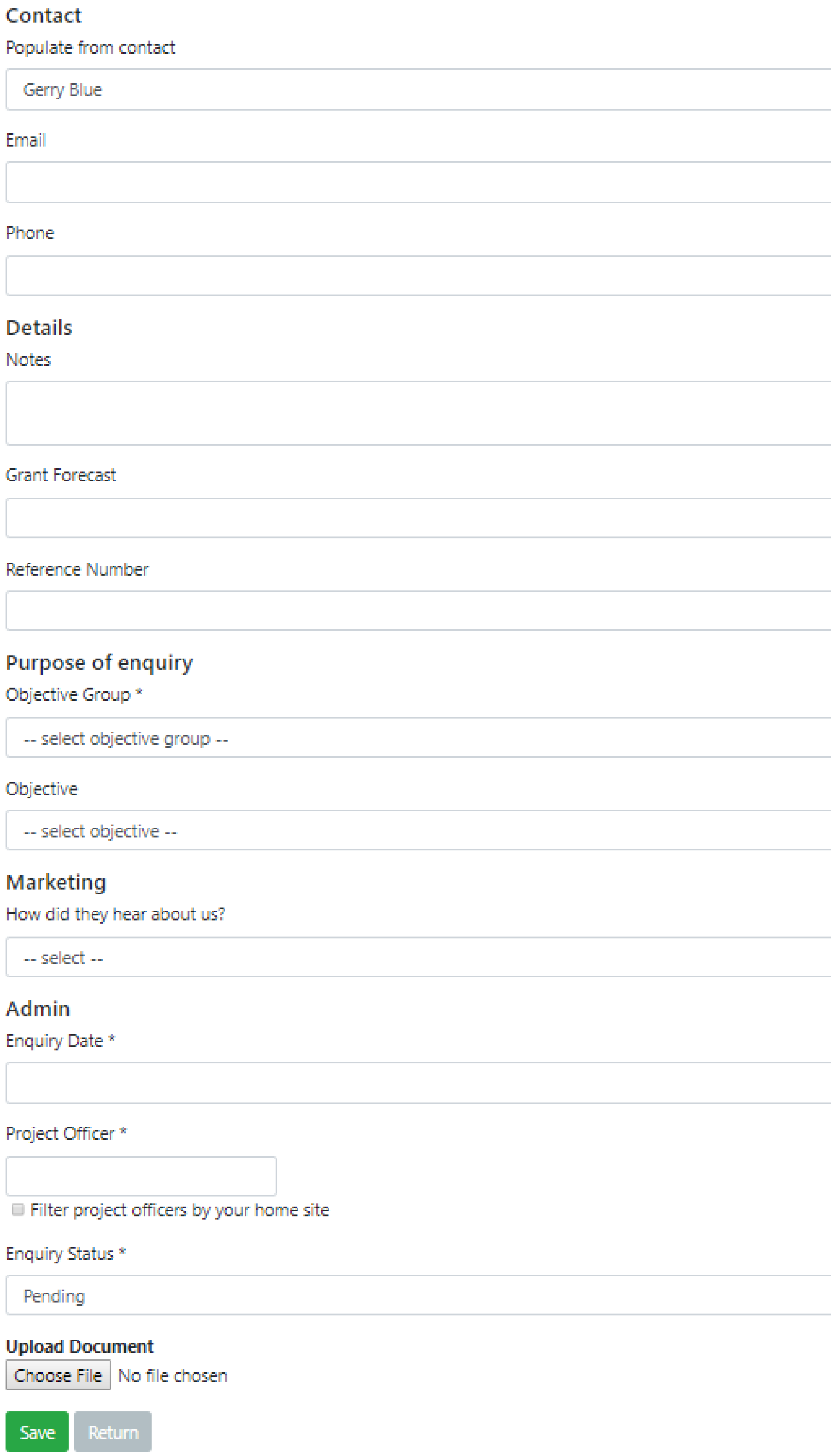
This form is like the edit view version.

The * fields are mandatory.

This form also includes options to use drop down menus, calendars and to upload a document at the bottom of the screen. To upload a document, press the button and then locate the selected file from your PC and press open.

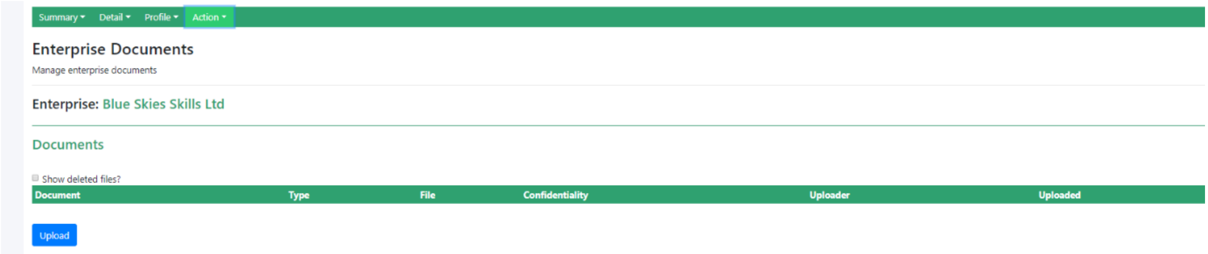
Once all fields have been completed, press the green ‘save’ button at the bottom of the screen.

The enterprise enquiries table on the main page will then be populated with this new information.



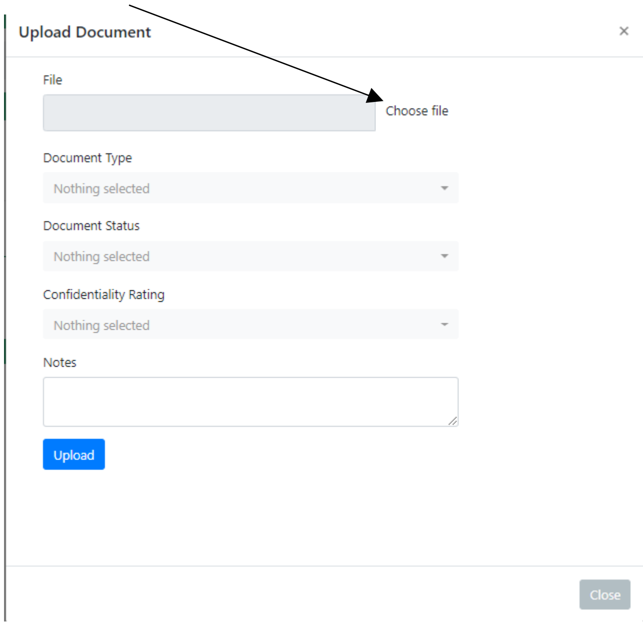
5.6 Enterprise documents

This sub section allows you to upload any documents related to the enterprise. This could be any supporting documents about a client or any document that may be required by the enterprise. It is possible to upload any Microsoft Word, Microsoft Excel, Adobe PDF, rtf, gif or jpg file. You are also able to show previously deleted files by clicking the option just above the table.



To upload a Document, simply click on the 'Upload' button at the bottom of the table. Once selected, the following pop up display will appear:

Use the choose file option to browse for the selected files on your computer Once selected, click on 'open'. The name of your chosen file should now be showing in the file text box.



The file size must not exceed 2MB. If you try to upload a file which is too big, a warning message will appear letting you know it cannot be uploaded.

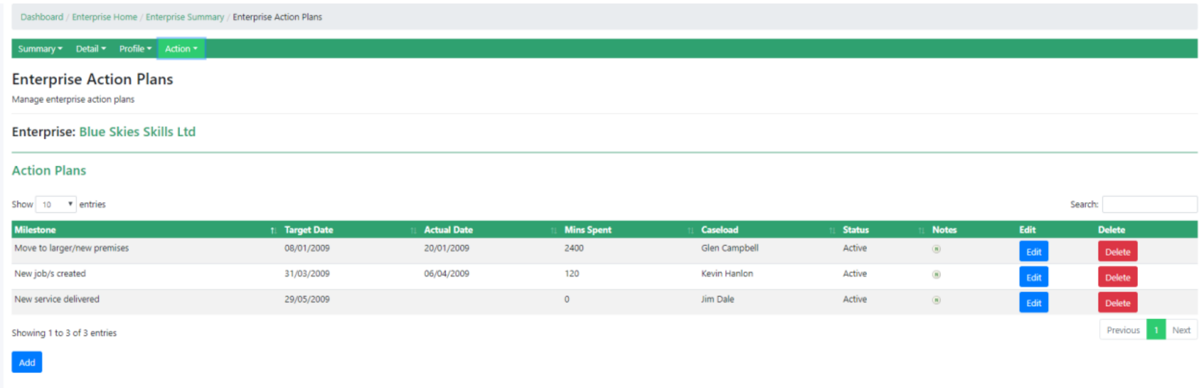
The notes section is to add any further details about the document you have attached, perhaps the reason for uploading, anything missing or context around the document.

Once all these fields have been recorded, press the blue 'upload' button and this change will be reflected in the table above.

5.7 Enterprise action plans

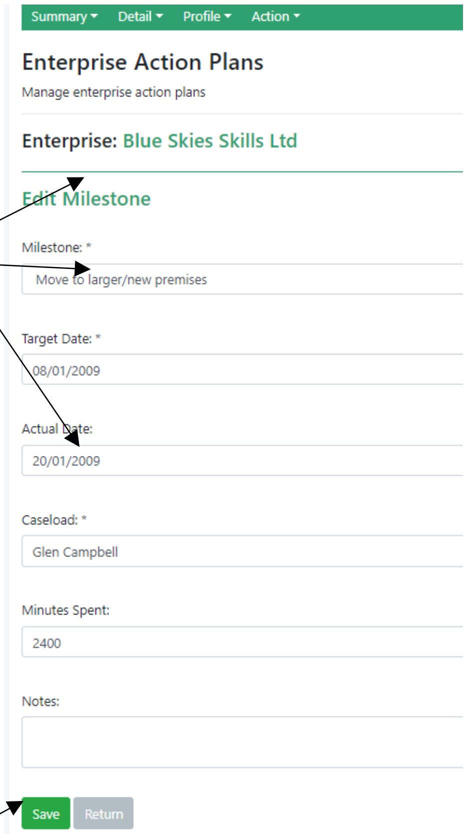
This sub section details the selected enterprises action plans. The Action Plan section can be used to set milestones for the business to achieve. If there are Action Plans/Milestones already in place these will be viewable here. This is a useful section of the system, as It will provide a brief overview of existing action plans when a user is busy but also has the option to provide further details about each action plan.

Milestones, target date, actual date, minutes spent, caseload, status, and notes are recorded against enterprise action plans. As show below:



Multiple action plans can be added against an enterprise. These action plans can also be deleted by pressing the red 'delete' button the right side of the table.

Furthermore, to '**edit**' an existing action plan, press the blue 'edit' button. Once selected the following will be shown:



The categories with a * next to the name mean the field is **mandatory** and must be completed.

Once the required information has been updated, press the green **'save'** button at the bottom and you will be returned to the main enterprise action plan page.

To **add** a new action plan, press the blue **'add'** button at the bottom of the table. Once selected you will be shown the same form you received to edit a milestone. The only difference will be is the fields will be blank for you to input the required information.

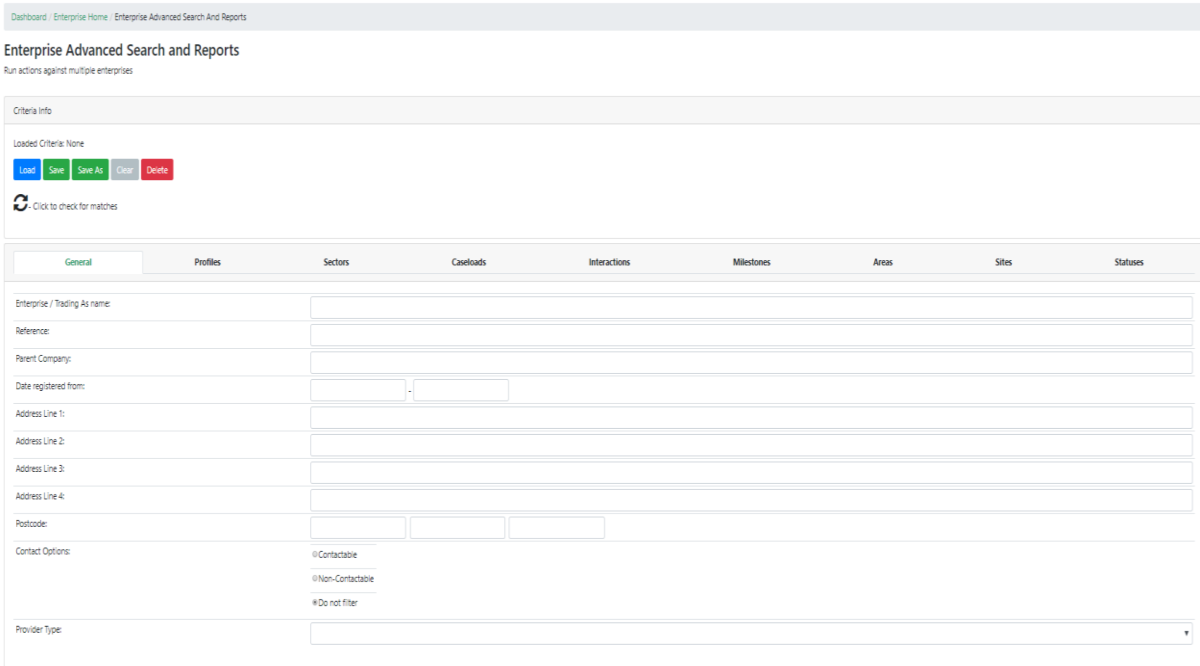
Once all the correct information has been recorded, press the green 'save' button at the bottom of the page. Your new milestone will be recorded in the main enterprise action plan table.

6.0 Enterprise reporting

6.1 Creating enterprise reports

The enterprise report section is used to highlight the different styles of reports that you can create to analyse enterprise data stored on the system. The system can then update various sections of the system with this data. To do this:

1. Select enterprise from the left side of the dashboard, then 'Advanced Search and Reports'.
2. Once selected the reporting dashboard will load as follows:



6.2 Enterprise reports overview

This type of report gives an overview of the information held by a specific enterprise including caseloads, sites, milestones and profiles.

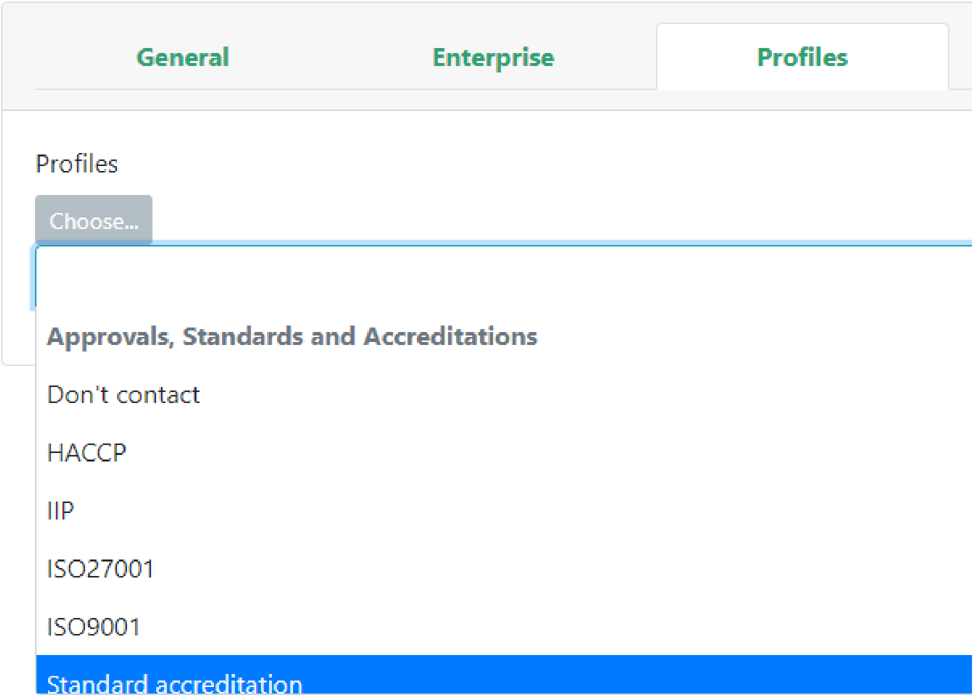
The sub-tab at the top of the report criteria are used for various types of criteria to report against. These criteria sections are: 'general', 'Profiles', 'Sectors', 'Caseloads', 'Interactions', 'Milestones', 'Areas', 'Sites' and 'statuses'. Each of these sub tabs vary in criteria and can be searched over several categories at once.

A useful tool to remember if you are searching between various tabs, is once information has been entered into one section (caseloads perhaps) , and you perhaps change to general and add content there, you will notice a * will be updated on the tab name.

6.3 Enterprise criteria

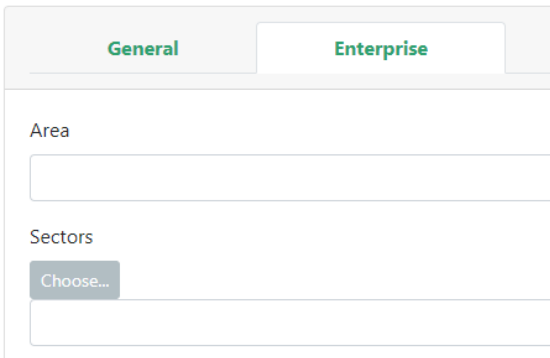
- **General –** The general tab is anything that may be stereotypical to this section such as basic details. This section is very specific to details that are displayed on an enterprise's basic details/summary pages. This includes, address, reference, name postcode etc. These are filled in by the usual text boxes, drop downs and options.

- **Profiles –** This section narrows down your search onto enterprise profiles. These are filtered through groups as follows:



Once the selected group is selected, you can then choose from the profiles that are associated to this group. Once you select a profile, it will be listed in the text box below (Please note this text box is not imputable). You can then continue to follow this process and create a list of specific profiles you wish to search by. These can be cleared by the 'clear' button at the bottom if needed.

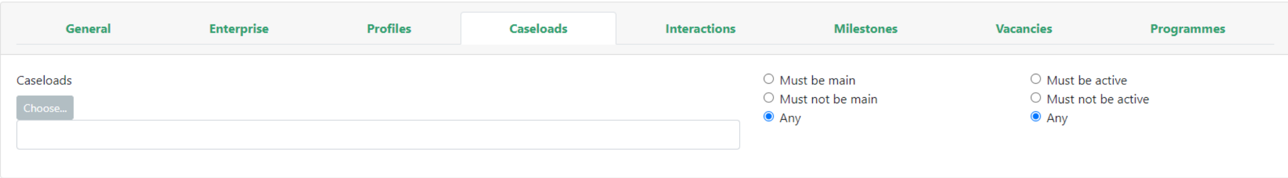
- **Sectors –** This section searches on sector criteria. This means sectors (or departments) in an organisation/enterprise. This could range from engineering, health care and retail.
To add sectors, following the exact same method of the profile section, the criteria is grouped. This means if you selected the ICT group, you would be provided with a list of sectors associated to that group. Once the sector has been chosen, it will be placed into the textbox below and can be added as a list, the same way as the Profile section.



- **Caseloads -** This section searches criteria based on caseloads. Caseloads are like line managers of a client. You can filter the search criteria to include active caseloads or all caseloads.

Following the exact same process as the sections above, once you have chosen the filter, you can pick from a drop-down list on the 'caseload' section. Once a caseload is selected it will be inputted into the text box below.

You can add as many caseloads as you wish.



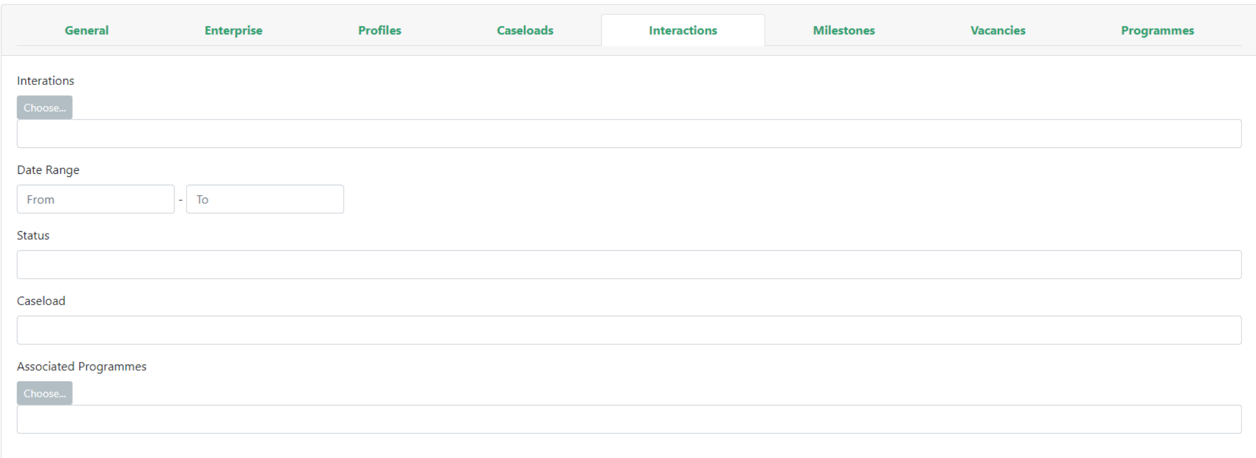
- **Interactions**

To search by interaction criteria, as the same as the previous sections, choose the selected group from the drop down. Then select the interaction from the down that is associated to the selected group. This will then show in the text box to the right as a list. More than one can be included.

The Date Range boxes can be used to specify that the Interaction must have taken place within a given time period. To select a date range, press the text box and a calendar window will appear.

The status can be selected by a drop-down list containing the following options: completed, not completed, pending, successful or all interactions.

Like the status section, a further drop-down list will appear for the Caseload option. You can also search the name at the top of the drop-down.

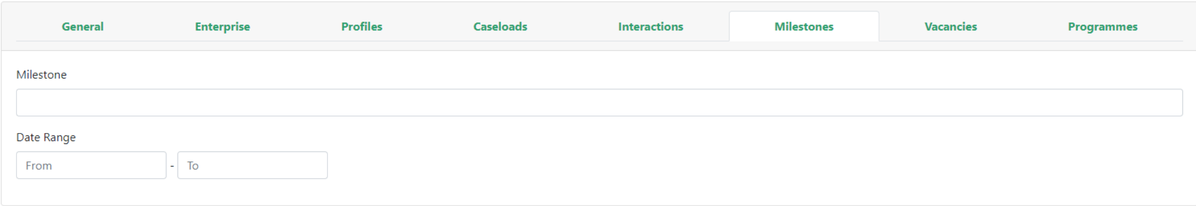


- **Milestones**

Milestones registered against an enterprise/client can be used as part of the search criteria in this section. As the same as the previous sections, you can filter if you wish to search by all milestones or not.

Once the filter is in place, you can then choose a selected milestone based of the filter criteria. This can be chosen through a drop down. Once found, you can list as many milestones as you wish. They will be displayed in the text box above.

You also have the option to filter any milestones that have been added/created etc between a certain date. This date range can be added through a calendar option in the 'date range' fields in the example above.

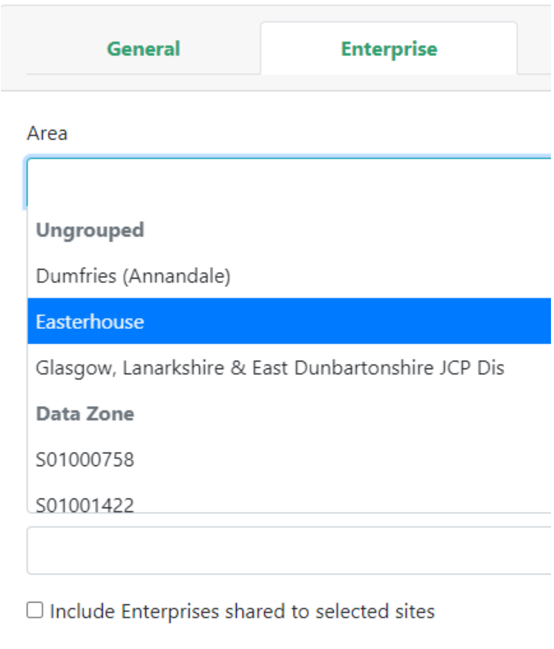


- **Areas**

The areas section allows you to set criteria based on a particular area under a local authority.

Following the same procedure as the previous sections, select from the drop-down menu on the group your chosen group.

Once selected, you can then choose the area from the associated drop-down list that is attached to the group. Once selected, the result will be recorded into the text box below. You can add multiple areas at a time.

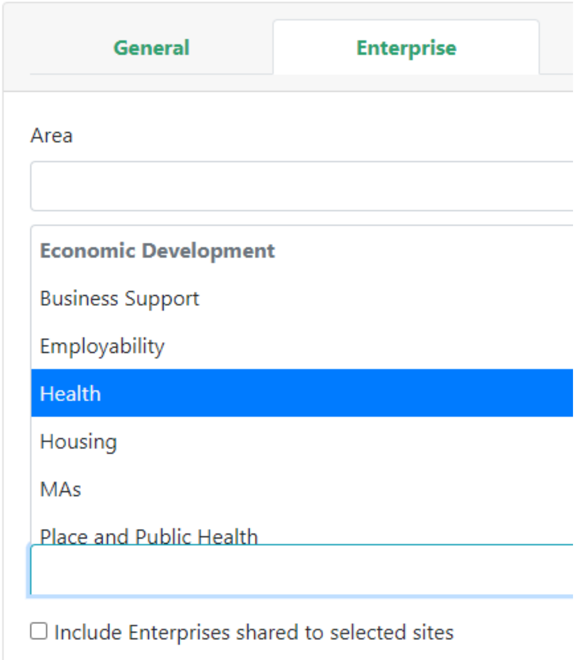


- **Sites**

The sites section relates to the sites within an organisation/enterprise. An organisation can have many sites under a division. Therefore, a report can be created based on specific sites.

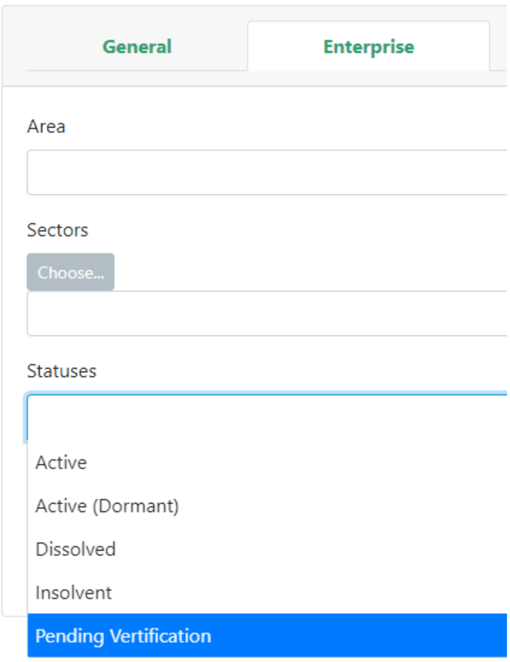
Using the same method as the sections above, if you select the division the site is located under by the drop-down menu. The drop-down menu on the 'sites' section will now reflect this and are able to select from. Once the site has been selected, the textbox above will update this choice. More than one site can be searched against at any time.

You also have the option to 'include Enterprise shared to selected sites' by clicking the tix box below the text box/clear button.



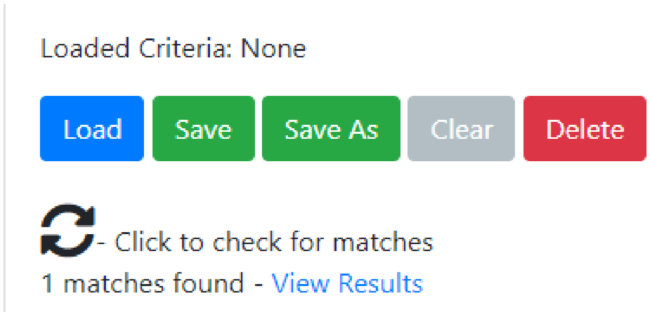
- **Statuses**

This section reflects the statuses of the enterprise. Following the same procedures as above, use the drop-down list from the 'statuses' section to search via whether an enterprise is active, inactive etc. Once selected, the status result will be added into the textbox list.



6.4 Client reporting buttons

Once all your criteria have been inputted, it is important to understand how the report workings and the buttons associated. As shown below:



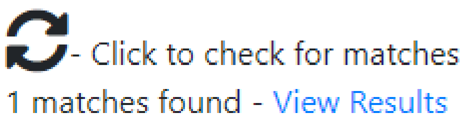
Located at the top of the reporting section, these buttons manage how the report and criteria results are used.

When you have selected all your criteria and may possibly need to do this same sort of report in the future you can ‘**save as’**. Or if you are updating then ‘**save**’. This will save a copy of the information you have inputted in. Therefore, when you come back to this report, if you press the ‘load’ button all your saved criteria from that save can be brought back.

Furthermore, if you wanted to clear all the information you had inputted, instead of going through each field and deleting them you can press the ‘**clear’** button, and this will delete it all.

The same goes with the ‘**delete’** button, to save you having to remove each field individually.

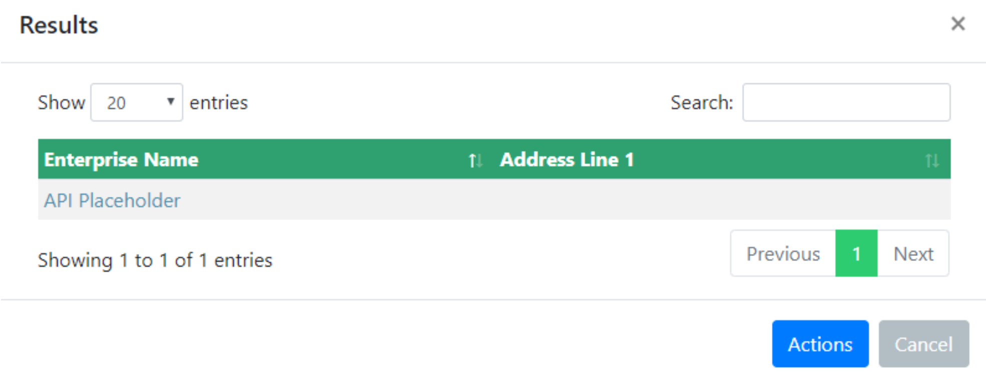
Finally, once all the relevant criteria have been loaded, if you press the ‘**Click to check for matches’** button, this is the button that performs the search. This button is key to beginning the reporting. Once selected, it will show you how many matches it has found and out of how many. This is how you know that the search went through. To view these matches, you then press the ‘view results’ as shown below.



6.5 Click for matches

Once the search has begun and has found matches, by pressing the ‘view matches’ you will then be shown the following example:

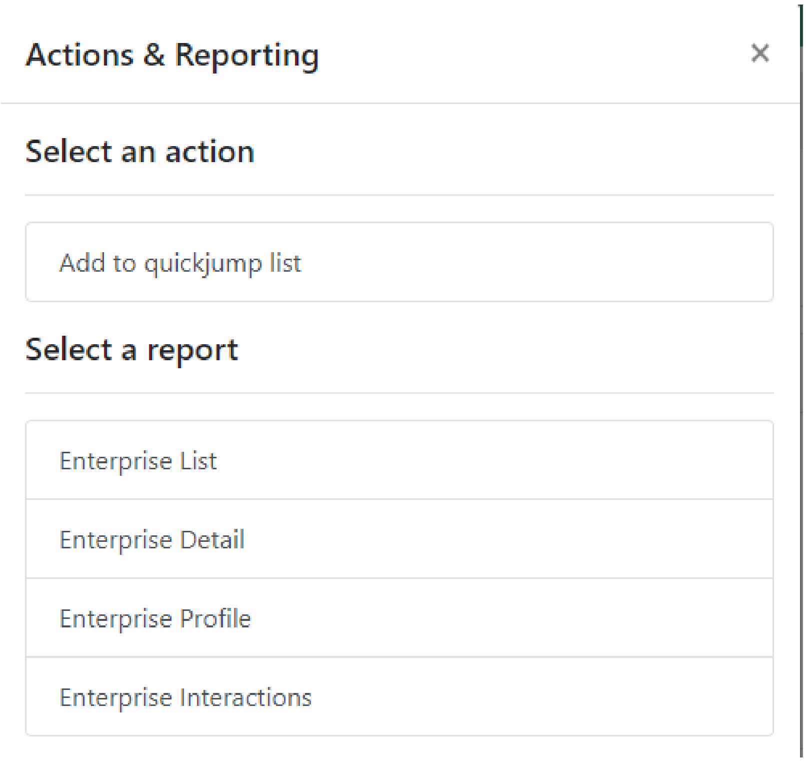
This shows all the matches that have met the criteria you have set from before.



Once viewed you can either press the ‘cancel’ button and continue searching other criteria or press the ‘Actions’ button to further use the information provided. Think of this section as like a print preview, where you can quickly check if you have the correct information you were looking for before continuing to do more with the data. This saves a lot of time by previewing before you spent further time on the actual data.

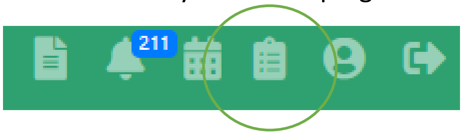
6.6 Enterprise matches actions

If you have decided to use the following matched data from the report and have pressed the ‘actions’ button from above, you will then be shown the following options. This means the information pulled from the reporting can be used in these following options:



- **Add to quick jump list**

Quick Jump Lists are used to build enterprise lists to enable easy access to client or enterprise records without returning to the Search screens. The jump list icon is located always on the top right and corner of the page. This can be used for both client and enterprise data. Therefore, the information matched from the reporting section, can be stored on the quick jump list to allow you to come back to it at any point and perform certain interactions with it. Various other features can be added to the quick jump list around the system (like the client side of the system).



- **Enterprise List**

When selecting this option with the following criteria searched, a report will be created. An example of a report created by this option is as the follows:

Report Output

Your requested report is displayed below. You may export this as a PDF document or as a Microsoft Excel Spreadsheet by using the export features in the report viewer.

Return

1 of 1 Find | Next

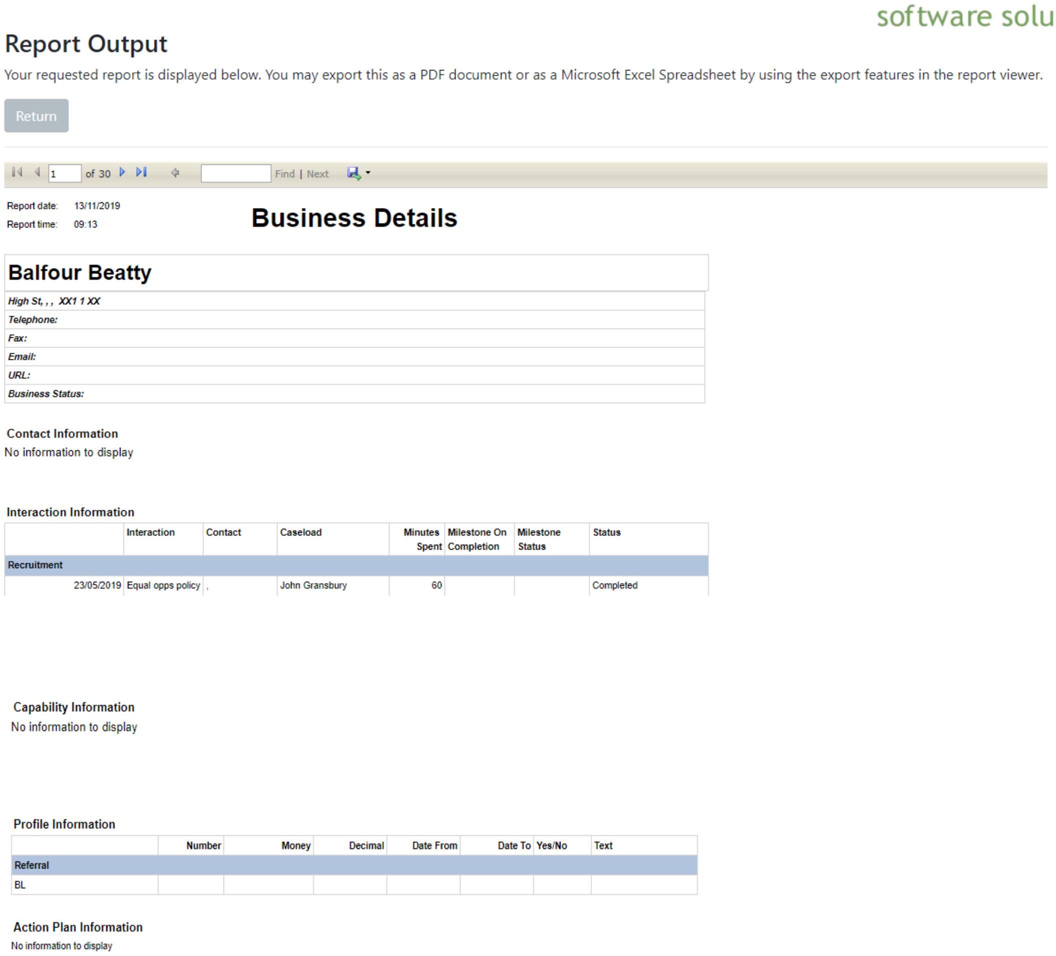
Business List

Business	Address 1	Address 2	Town	County	Post Code	Country	Telephone	Business Status	Email	Main Contact	Contact Tel	Contact Email
Edwards Construction	72 White Lane	Sinfin	Derby		DE6 5 HD					,		
Derby Test Company	Elvaston Street	Borrowash	Derby		DE3 2 JR		01332 245109		info@derby.co.uk	Birch, Gina	01332 281390	gina@derby.co.uk
Carillion	Tarmac Road				XX1 1 XX					,		
Jack Daniel's IT Contractors	33 Wellington Street				NG4 1 DX	England	01253847439		j.daniels@contracters-ltd.co.uk	Daniels, Jack		daniels.j@live.co.uk
MPI	Tees Valley				XX1 1 XX					Hanlon, Kevin		

You then have the option to save this report by pressing the save button above. This report will give you an overall summary list of the criteria that you have searched against. This can also be exported as PDF and a Microsoft Excel Spreadsheet.

- **Enterprise Detail**

When selecting this option with the following criteria searched, a report will be created. An example of a report created by this option is as follows:



Report Output

Your requested report is displayed below. You may export this as a PDF document or as a Microsoft Excel Spreadsheet by using the export features in the report viewer.

Return

1 of 30 Find | Next

Report date: 13/11/2019
Report time: 09:13

Business Details

Balfour Beatty

High St, , , XX1 1 XX
Telephone:
Fax:
Email:
URL:
Business Status:

Contact Information

No information to display

Interaction Information

	Interaction	Contact	Caseload	Minutes Spent	Milestone On Completion	Milestone Status	Status
Recruitment							
23/05/2019	Equal opps policy	,	John Gransbury	60			Completed

Capability Information

No information to display

Profile Information

	Number	Money	Decimal	Date From	Date To	Yes/No	Text
Referral							
BL							

Action Plan Information

No information to display

This report provides more specific detail on the required criteria, rather than listing it in a table. If any areas are blank, this is because no criteria was entered or does not exist for the criteria that was searched. This report can be exported as a PDF document or as a Microsoft Excel Spreadsheet, or save it by using the save icon button at the top of the report.

- **Enterprise Profile**

When selecting this option with the following criteria searched, a report will be created. Any blank areas often mean there was no criteria searched against them or there was no existing data in the first place. An example of a report created by this option is as follows:

Hanlon
software solutions

Report Output

Your requested report is displayed below. You may export this as a PDF document or as a Microsoft Excel Spreadsheet by using the export features in the report viewer.

Return

1 of 3 Find | Next

Report date: 13/11/2019
Report time: 09:18

Business Profile

Fitzwise Transport

Lenton Lane, Lenton, Nottingham, NG7 4 FQ
Telephone: 0115 9590077
Fax: 0115 9417432
Email: info@hcs-ltd.co.uk
URL:

Contact Information

Name	Telephone	Email	Main?	Job Description
Livingston, Ken		kevin@hcs-ltd.co.uk	Main Contact	MD

Interaction Information

	Interaction	Contact	Caseload	Status	Interaction Notes	Private Notes
CRM						
13/10/2015	No longer engaged	,	Kevin Hanlon	Completed		

Profile Information

	Number	Money	Decimal	Date From	Date To	Yes/No	Text
Company Type							
Limited Company							
Number of Employees							
1 - 20 Employees							

General Notes

Private Notes

This report can be exported as a PDF document or as a Microsoft Excel Spreadsheet, or save it by using the save icon button at the top of the report.

- **Enterprise Interactions -** When selecting this option with the following criteria searched, a report will be created. This report will search via interactions the enterprise has had. Any blank areas often mean there was no criteria searched against them or there was no existing data in the first place. An example of a report created by this option is as follows

Hanlon
software solutions

Report Output

Your requested report is displayed below. You may export this as a PDF document or as a Microsoft Excel Spreadsheet by using the export features in the report viewer.

Return

1 of 6 Find | Next

Report date: 13/11/2019
Report time: 09:20

Interactions by Business

	Interaction Date	Status	Caseload Name	Minutes Spent	Hours Spent	Cost	Milestone On Completion	Milestone Status
Balfour Beatty								
Recruitment								
Equal opps policy check	23/05/2019	Completed	John Gransbury	60	1.00	0.00		
Notes: None								
Totals for Interaction Group Recruitment:				**60**	**1.00**	**0.00**		
Total for business Balfour Beatty:				**60**	**1.00**	**0.00**		
Blue Skies Skills Ltd								
CRM								
Email received	06/11/2019	Completed	Billy Connolly	0	0.00	0.00		
Notes: Test notes								
Meeting	19/06/2019	Completed	Kevin Hanlon	60	1.00	50.00		
Notes: Example public notes								
Meeting	03/06/2019	Completed	Kevin Hanlon	60	1.00	45.00		
Notes: Example public notes								
25+ pathway application completed	16/12/2015	Completed	Kevin Hanlon	60	1.00	0.00		

This report can be exported as a PDF document or as a Microsoft Excel Spreadsheet, or save it by using the save icon button at the top of the report.

Notes: Test public notes								
Phone call	08/04/2015	Completed	Kevin Hanlon	0	0.00	0.00		
Notes: Public test								
Site meeting	08/04/2015	Completed	Kevin Hanlon	0	0.00	0.00		
Notes: None								
25+ pathway application completed	07/05/2014	Completed	Tracey	0	0.00	0.00		
Notes: None								
Meeting	24/02/2014	Pending	Jim Dale	60	1.00	0.00		
Notes: Second of two meeting to discuss implementation								
Meeting	17/02/2014	Pending	Jim Dale	60	1.00	0.00		
Notes: First of two meeting to discuss implementation								
Business Assisted	01/05/2009	Completed	Glen Campbell	15	0.25	0.00		
Notes: I provided advice on grants								
Meeting	14/04/2009	Pending	Jim Dale	60	1.00	0.00		
Notes: None								
Meeting	24/03/2009	Pending	Glen Campbell	30	0.50	0.00		