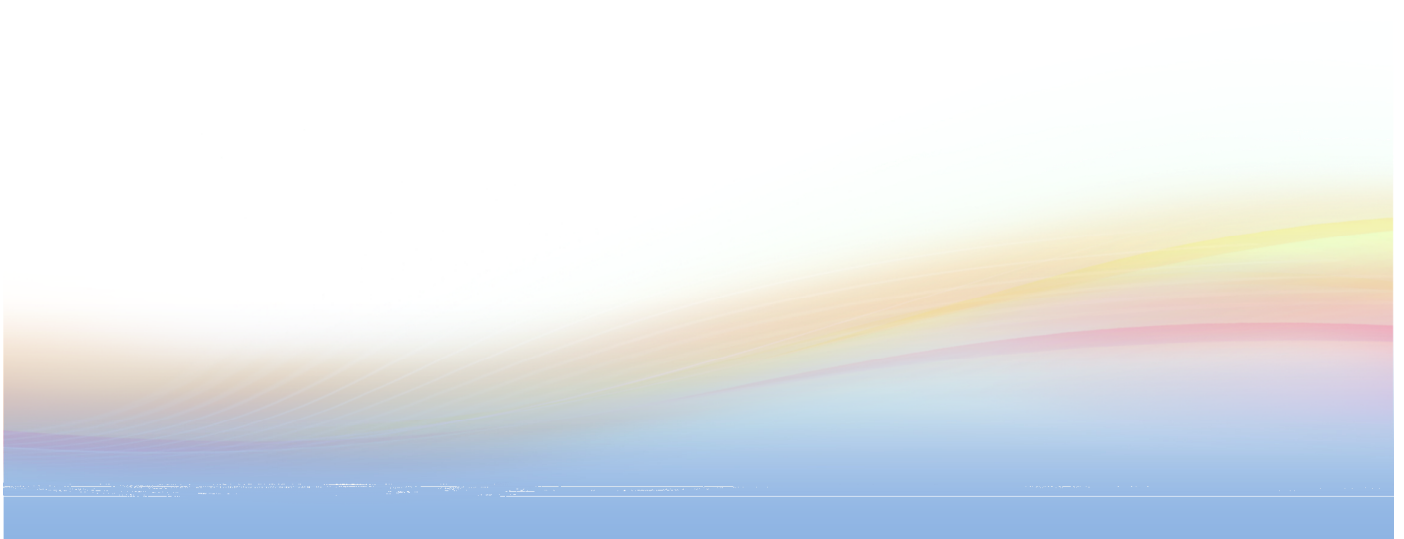


# Gateway Foundation Activities Module

Jan 2013

Version 1.0



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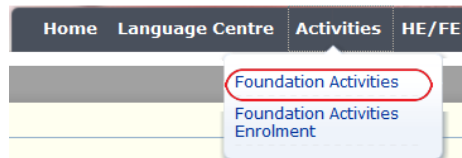
## Foundation Activities Module

The module allows students, parents and staff from all schools sign up for activities organised by ESF Centre. ESF Centre administrator can tailor make application forms for different user types: student, parent and staff for each programme, and it is possible to make a program target for specific user types, year group and schools. It was designed based on the Beijing trip 2012 work flow, and with a view to making it available for others activities to offer ESF wide trips and activities allowing online sign up in the future.

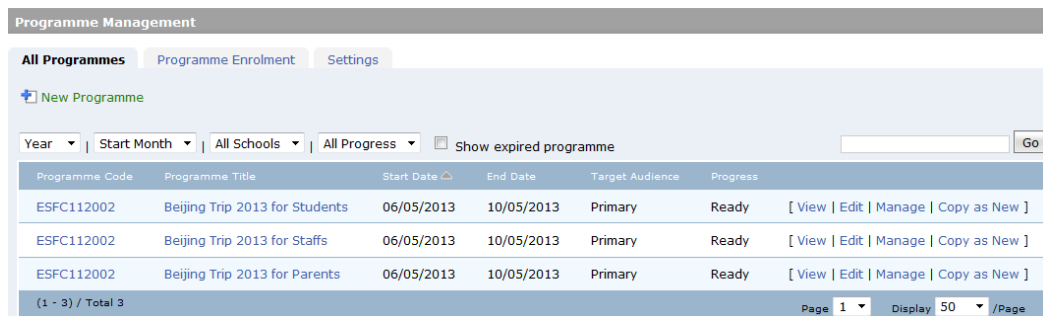
### 1. Programme Management – Foundation Admin

It requires the **ESFC Foundation Activities Management Gateway** role in order to manage the module.

- Login to ESF Centre Gateway
- Go to **Activities** menu.
- Select **Foundation Activities**.



- The Foundation Activities module will be opened.



Programme Code	Programme Title	Start Date	End Date	Target Audience	Progress	
ESFC112002	Beijing Trip 2013 for Students	06/05/2013	10/05/2013	Primary	Ready	[ View   Edit   Manage   Copy as New ]
ESFC112002	Beijing Trip 2013 for Staffs	06/05/2013	10/05/2013	Primary	Ready	[ View   Edit   Manage   Copy as New ]
ESFC112002	Beijing Trip 2013 for Parents	06/05/2013	10/05/2013	Primary	Ready	[ View   Edit   Manage   Copy as New ]

It lists all the foundation activities. To look for an expired programme, tick the **Show expired programme** check box. It is possible to narrow down your search by the **Year, Start Month, Schools and Progress** drop-down. Also you may search a program by inputting part of its programme title and click **Go**.

#### Add a new programme

User may create a new programme by click on the **New Programme** link, or copy from an existing programme with its data by the **Copy as New** link. There are number of fields are required to fill in.

**School code:** school that organise the programme

**Target Audience:** expected audience of the programme, but this is nothing to do with controlling who can see the programme.

**Allow Sign up:** specify what user type is allowed to view the programme and sign up/enrol

**Year Group:** what year band(s) student/parent is allowed view the programme and sign up/enrol

**Programme Management**

All Programmes Programme Enrolment Settings

**New Programme**

Programme Convener  
 Contact Person \* Ms LIU, Ling Email \* ling.liu@esfcentre.edu.hk

School Code \* ESFC Year \* 12

Target Audience \* 1 - for Primary 002

Allow Sign Up \*  
 Staff [Edit Application Form](#)  
 Parents for students [Edit Application Form](#)  
 Parents for themselves [Edit Application Form](#)

Year Groups \*  
 All Years  
 K1  K2  Y01  Y02  Y03  Y04  Y05  Y06  Y07  Y08  Y09  Y10  Y11  Y12  Y13

Programme Title \* Beijing Trip 2013

Description \*  
 Date 6-10 May 2013,  
 Registration 25 Feb - 12 April 2013,  
 Cost: HK\$9,830 child, HK\$11,030 parent

Venue  
 Beijing

Start Date \* 06/05/2013

End Date \* 10/05/2013

Enrolment Opens Date \* 25/02/2012

Enrolment Closes Date \* 15/03/2013

Enrolment \*  
 First come first served  Select manually

Places Offered \*  
 220 from All Schools  
 (This section determines who sees a programme and who is able to apply for it.)  
 from School Code [X Delete Offer](#)  
[+ Add more schools](#)

Waiting List \*  
 Yes  No

Attachment  
[Beijing\\_Trip\\_1305\\_Letter\\_to\\_Parents\\_1.pdf](#) [X Delete](#)  
[+ Add more documents](#)

Fields with asterisk \* are required.

Submit Reset Cancel

**Start Date & End Date:** start and end date of the programme

**Enrolment Opens Date & Enrolment Closes Date:** the dates to open/close the programme for Enrolment accordingly.

**Enrolment:** there are two options, first come first served or confirmed by Admin manually.

**Places Offered:** can be a lump sum for All Schools, or specify the quota for individual schools

**Waiting List:** if answer **Yes**, it will allow enrolment when quota is full and put the candidates to waiting list subject to admin's approval. If answer **No**, it won't allow any enrolment when there is no vacancy.

## Setup Application Form

Application forms can be setup based on the Allow Sign Up user types: Staff, Parent for Student, and Parent for themselves. When user apply for the programme, the application form will be pop-up for user to input required data. It is possible to save an application form as a template for reuse.

Click on **Edit Application Form** next to the Parent for Student option to manage an application form. A screen will be shown as below.

**Application Form - Parents for students**

Application Template: Please Select

Application Template Name:

Please select fields to display

Student Information:

- Official Full Name
- Gender  Delete Field
- Date of Birth  Delete Field
- + Add New Field

Guardian Information:

- Please Select
- + Add New Field

Family Information:

- Please Select
- + Add New Field

Emergency Information:

- Please Select
- + Add New Field

Reply Slip:

- Display Question Number
- Please Select

Submit Save as new Cancel

It allows apply any **Application Template** created previously, and then make necessary changes to build a form.

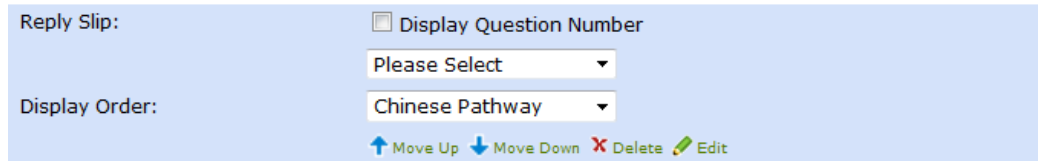
For Parent for students application form, it allows to add student demographic data fields to the application form directly, which will save applicant's effort on inputting everything but just need to verify the data we have.

- Select data field from each Information categories you need
- Click on **Add New Field** to add more fields
- **Delete Field** if you don't need it

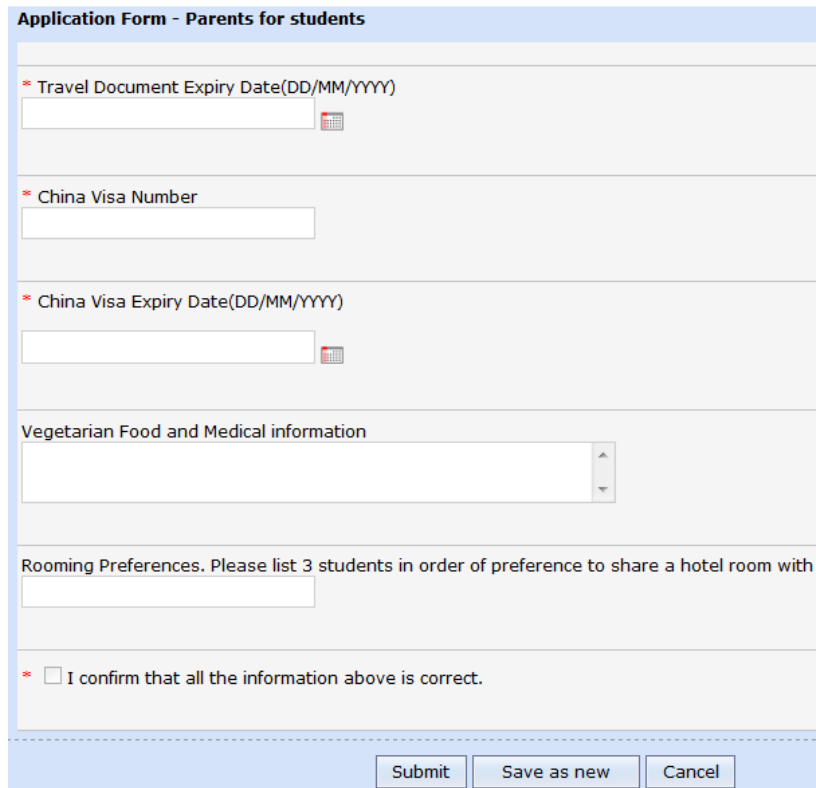
You may add more extra fields to the form in the **Reply Slip** session. There are a number of data field types available. E.g. Text field, True or False, MC (single), MC

(multiple), Date, Date of Birth etc. you may specify each field to be mandated or optional.

- Reorder field - you may reorder the selected field in **Display Order**, use the **Move Up**, **Move Down** buttons to move it.
- Delete field - you may delete the selected field in **Display Order**, by click on the **Delete** button

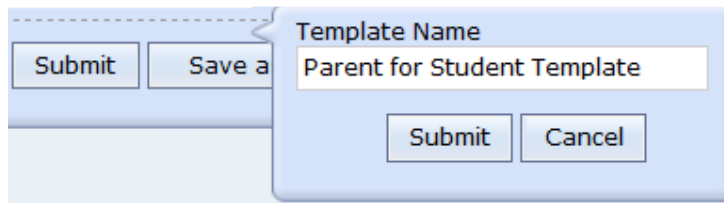


- Edit field – you may edit the selected field in **Display Order**, click on the **Edit** button, Scroll to locate the selected field on the form, change anything necessary, click **[Save]** link to save the changes.



*A sample Application form*

- Save template – after everything done, optionally, you may save this as a template for future reuse. Click on **Save as new**, give a Template name and click on **Submit** to save. Next time you may load it from the **Application Template**, and create a new form based on this template.



- To save application form, click on the **Submit** on the application form.
- User will be required to fill out the application form if and only if the application form has been setup.

## Programme Enrolment

To manage the Enrolment, click on the **Manage** link.

Programme Management							
All Programmes   <b>Programme Enrolment</b>   Settings							
Year	Start Month	<input type="checkbox"/> Show expired programme		<input type="text"/> Go			
Programme Code	Programme Title	Target Audience	Enrolment Closes	Start Date	Quota	Approved Applicants	Enrolment Management
ESFC112002	Beijing Trip 2013 for Students	Primary	15/03/2013	06/05/2013	220	2	Manage
ESFC112002	Beijing Trip 2013 for Staffs	Primary	15/03/2013	06/05/2013	30	0	Manage
ESFC112002	Beijing Trip 2013 for Parents	Primary	15/03/2013	06/05/2013	10	2	Manage

(1 - 3) / Total 3 Page 1 / Display 50 /Page

It shows the programme enrolment list with the approval status.

Programme Management										
All Programmes   <b>Programme Enrolment</b>   Settings										
All Schools   All User Type										
ESFC112002 - Beijing Trip 2013 for Students [ Show Details ]										
#	Name	Gender	Type	Registration Time	School	Year Group	Roll Group	Approved	Waiting List	
1	BHAV000020, BHAV000020	M	Student	Dec 19 2012 09:45PM	BHS	Y06	6H	✓		
2	BUCK000028, BUCK000028	F	Student	Dec 19 2012 09:50PM	BHS	Y06	6F	✓		

[Edit](#) [Back](#)

To change the status and edit information, click on **Edit** button.

Programme Management												
All Programmes   <b>Programme Enrolment</b>   Settings												
All Schools   All User Type												
ESFC112002 - Beijing Trip 2013 for Students [ Show Details ] <span style="float: right;">+ Add Applicant</span>												
#	Name	Gender	Type	Registration Time	School	Year Group	Roll Group	Application Form	Deposit	Final payment	Status	Remark
1	BHAV000020, BHAV000020	M	Student	Dec 19 2012 09:45PM	BHS	Y06	6H		<input type="checkbox"/>	<input type="checkbox"/>	Approved	
2	BUCK000028, BUCK000028	F	Student	Dec 19 2012 09:50PM	BHS	Y06	6F		<input type="checkbox"/>	<input type="checkbox"/>	Approved	

[Submit](#) [Reset](#) [Cancel](#)

- User can edit the application forms submitted by candidates, click on the edit icon to launch the application form to edit. However, you won't be able to see the edit icon if the registration does not require fill in any application form.

- It allows capture **Deposit** and **Final Payment** status.
- To change the enrolment status, select the **Status** from the drop-down.
- It allows input **Remarks** to the text box.
- Click on the **Export to CSV** to download all the application form details to a CSV file for further manipulation.
- To print the application form, click on the **Print All Application Form**



## Settings

**Programme Management**

All Programmes Programme Enrolment **Settings**

**Programme Settings**

Days of withdrawal before programme start

**Email Notification Settings**

Notify on new programme

Notify on new application

Notify on application approval/rejection

Notify on application withdrawal

Notify on programme cancellation

Notify when promoted from Waiting list to Approval Pending

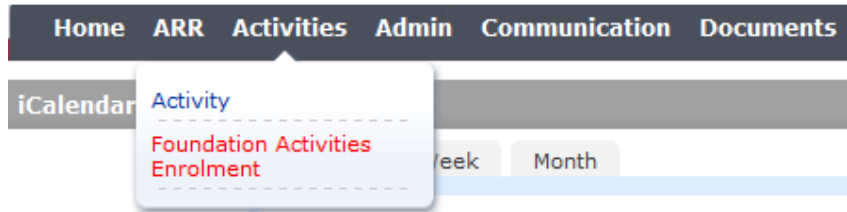
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It is possible to change the withdrawal policy for the programmes.

e.g. input 30 to the **Days of withdrawal before programmes start**, it will allow candidates to withdraw the enrolment 30 days prior to the programme start date. It will also allow applicant to edit application form 30 days prior to the programme start date.

## 2. Programme Enrolment – Parent, Student, Staff

Login in as a parent who eligible for enrolment to the programme. Click on **Activities** → **Foundation Activities Enrolment**.



Under the **Programme Enrolment**, first of all, parent needs to select whom he is going to **enrol for**. Select from the **Enrol for** drop down list. i.e. enrol for **self** or enrol for the student. The eligible active programme(s) will be shown on the list. Parent is required to do the enrolment for each person who wish to apply for the programme.

Programme Enrolment

Programme Enrolment My Programmes

Enrol for: Self  
Please Select  
Self  
BUCK000028, BUCK000028  
BUCK000034, BUCK000034

Note: It is in listed.

Year | Start Month | Show expired programme

Programme Code	Programme Title	Target Audience	Enrolment Closes	Start Date	Quota	Vacant	
ESFC112002	Beijing Trip 2013 for Parents	Primary	15/03/2013	06/05/2013	10	8	[ View   Apply ]

(1 - 1) / Total 1 Page 1 / Page Display 50 / Page

Click on the **Programme Title** or **View** link to view the programme full details.

Programme Code	Programme Title	Target Audience	Enrolment Closes	Start Date	Quota	Vacant	
ESFC112002	Beijing Trip 2013 for Parents	Primary	15/03/2013	06/05/2013	10	8	[ View   Apply ]
Programme Period:		06/05/2013 - 10/05/2013					
Max Number of Participants:		10					
Max Places offered to schools:		10 from All School					
Venue:		-					
Target Audience:		School: All School Phase: Primary					
Programme Material:		Beijing_Trip_1305_Letter_to_Parents_1.pdf					
Short Description:		Date 6-10 May 2013, Registration 25 Feb - 12 April 2013, Cost: HK\$9,830 child, HK\$11,030 parent					
Programme Convener:		-					
Contact Person:		Ms LIU, Ling					
Email:		ling.liu@esfcentre.edu.hk					
Enrolment Period:		18/12/2012 - 15/03/2013					
Registered Currently:		2					

If a programme starts for enrolment, user will see an **Apply** link, otherwise the **Apply** link will not be shown.

To enrol, click **Apply**. There will be a confirmation message, and click **OK** to confirm.

Are you sure to enrol now?

OK Cancel

If the programme requires submitting an application form, it will redirect to the application form. User will be required to fill in the application form, click **Submit** to complete the application.

**Programme Enrolment**

**Programme Enrolment**
My Programmes

**ESFC112002 - Beijing Trip 2013 for Parents** [\[ Show Details \]](#)

**Application Form - Beijing Trip 2013 for Parents**

Name

---

**Question**

\* Surname(as in Travel Document)

---

\* Given Name(as in Travel Document)

---

\* Date of Birth(DD/MM/YYYY)

---

\* Gender  
 Male  
 Female

---

\* Email

\*  I hereby declare that all the above information is accurate and that I have contacted my child's school to join this trip as a parent helper.

After complete the application, it will redirect to the **My Programmes** tab, which lists the programme enrollment status.

Programme Enrolment
**My Programmes**

Note: Withdrawal is allowed up to 2 days prior to programme start.

Self
Year
Start Month
 Show expired programme

Go

Programme Code	Programme Title	Venue	Start Date	End Date	Progress	Remark
ESFC112002	Beijing Trip 2013 for Parents	Beijing	06/05/2013	10/05/2013	Enrolled and Approved	- [ View   Withdraw ]

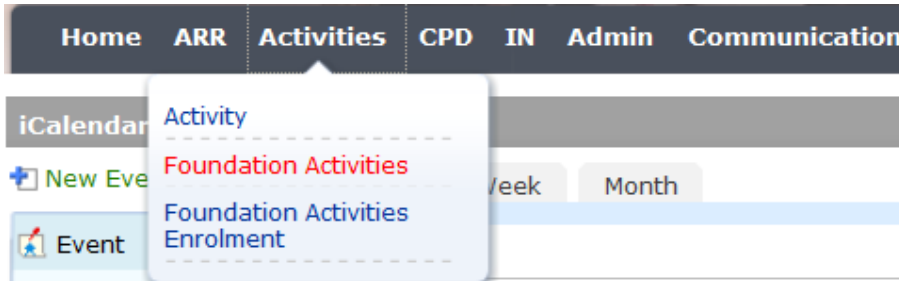
(1 - 1) / Total 1
Page 1 Display 50 /Page

**Withdrawal** or **Edit** application form is allowed within a specific period according to the **Note** shown on top of the list. To Withdraw, click on the **Withdraw** link. To Edit application form click on the **Edit** link.

### 3. Programme Management – School Admin

At school level, teacher with **Foundation Activity Management** Gateway role will be able to view the enrolment list for their school.

Log in Gateway, **Activity** → **Foundation Activities**



It lists all the foundation activities. To view an expired programme, tick the **show expired programme** check box. It is possible to narrow down your search by the **Year, Start Month, Schools and Progress** drop-down criteria. Also you may search a programme by inputting part of its programme title and click **Go**.

Programme Code	Programme Title	Start Date	End Date	Target Audience	Progress
ESFC112002	Beijing Trip 2013 for Students	06/05/2013	10/05/2013	Primary	Ready [ View ]
ESFC112002	Beijing Trip 2013 for Staffs	06/05/2013	10/05/2013	Primary	Ready [ View ]
ESFC112002	Beijing Trip 2013 for Parents	06/05/2013	10/05/2013	Primary	Ready [ View ]

You may click on the Programme Title or View link to view the full details of a programme.

Programme Code	Programme Title	Start Date	End Date	Target Audience	Progress
ESFC112002	Beijing Trip 2013 for Students	06/05/2013	10/05/2013	Primary	Ready [ View ]
Programme Period:		06/05/2013 - 10/05/2013			
Max Number of Participants:		220			
Max Places offered to schools:		220 from All School			
Venue:		Beijing			
Target Audience:		School: All School Phase: Primary			
Programme Material:		<a href="#">Beijing_Trip_1305_Letter_to_Parents_1.pdf</a>			
Short Description:		Date 6-10 May 2013, Registration 25 Feb - 12 April 2013, Cost: HK\$9,830 child, HK\$11,030 parent			
Programme Convener:		-			
Contact Person:		Ms LIU, Ling			
Email:		ling.liu@esfcentre.edu.hk			
Enrolment Period:		25/02/2012 - 15/03/2013			

## Programme Enrolment

Programme Management								
All Programmes		<b>Programme Enrolment</b>	Settings					
Year	Start Month	<input type="checkbox"/> Show expired programme						Go
Programme Code	Programme Title	Target Audience	Enrolment Closes	Start Date	Quota	Approved Applicants	Enrolment Management	
ESFC112002	Beijing Trip 2013 for Students	Primary	15/03/2013	06/05/2013	220	0	View	
ESFC112002	Beijing Trip 2013 for Staffs	Primary	15/03/2013	06/05/2013	30	1	View	
ESFC112002	Beijing Trip 2013 for Parents	Primary	15/03/2013	06/05/2013	1	1	View	

(1 - 3) / Total 3 Page 1 / Display 50 /Page

Click on the **Programme Enrolment** tab, it lists the quota and number of approved applications for each programmes. Click **View** to show the enrolment list with approval status for each candidate.

All Programmes		<b>Programme Enrolment</b>	Settings						
KOS	All User Type								
<b>ESFC112002 - Beijing Trip 2013 for Staffs</b> [ Show Details ]									
#	Name	Gender	Type	Registration Time	School	Year Group	Roll Group	Approved	Waiting List
1	Gateway, Support3		Staff	Dec 28 2012 11:19AM	Our School			✓	

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### Settings

At school level, you may ignore the **Settings** tab, currently email alerts will not go to school administrator.