

A background photograph of three people in a modern office setting. A man in a dark blazer and glasses is seen from the back, holding a laptop. He is high-fiving a bearded man in a denim shirt who is smiling broadly. A woman in a light grey blazer is partially visible on the right, also smiling. The scene is lit with soft, modern office lighting.

# User manual online management supplier portal

**Develop Yourself**







## Index

<b>DEVELOP YOURSELF .....</b>	<b>1</b>
<b>1 FOREWORD.....</b>	<b>3</b>
1.1 Logging in.....	3
1.2 General.....	3
1.3 Using online management.....	4
<b>2 SETTINGS.....</b>	<b>5</b>
2.1 Parameters.....	5
2.1.1 Language.....	5
2.1.2 Daily notification with new subscriptions completed.....	5
2.1.3 Product and event maintenance.....	5
2.1.4 Registration complete and ready for evaluation .....	6
2.2 Countries.....	6
<b>3 COMPANY CHARACTERISTICS.....</b>	<b>7</b>
3.1 General.....	7
3.2 Billing address.....	8
3.3 Contacts.....	10
<b>4 REPORTS .....</b>	<b>10</b>
4.1 Registrations.....	10
4.2 Products in Search & Register .....	11
4.3 Products per system category .....	12
4.4 Entering training results .....	12
<b>5 PRODUCT RESOURCES.....</b>	<b>14</b>
5.1 Types of packages (changes in Price Elements) .....	14
5.2 Locations.....	15
<b>6 PRODUCTS.....</b>	<b>16</b>
6.1 Maintain.....	16
6.1.1 General.....	17
6.1.2 Packages.....	18
6.1.3 Categories (Mandatory).....	20
6.1.4 Level.....	21
6.1.5 Competencies.....	21
6.1.6 Texts.....	21
6.2 Import.....	22
<b>7 EVENTS .....</b>	<b>23</b>
7.1 Events.....	23
7.2 Schedule.....	25
7.3 Accommodation package .....	26
<b>8 PRODUCT GROUPS.....</b>	<b>26</b>





# 1 Foreword

## 1.1 Logging in

Before you can start using Develop Yourself as an Archipel supplier, you will receive a login code at the e-mail address given by your organisation.

You can then start the process at <https://www.manageyourservices.nl>.

Tip: save this URL in your web browser's favourites!

The following login screen appears. Log in using the e-mail address and password.

The screenshot shows a login interface with the title "Login to the system". It contains two input fields: "Login name" with a user icon and "Password" with a lock icon. Below the password field is a link "Forgot password?" and a red "Login" button. At the bottom, there is a welcome message: "Welcome to the Learning Portal of your company. You can use it to Search for and Register on learning activities. Please note that Seminars and Conferences are not considered as a portal learning activity. If you don't know your password, you can request a new password via the link in the right upper corner. A new password will be sent to your business email address. For questions and remarks, please contact the Learning Desk / Academy of your company. Or send an email to the Servicedesk at Archipel, [info@archipel.academy](mailto:info@archipel.academy)."

## 1.2 General

After logging in, the following screen appears

The screenshot shows a top navigation bar with the following links: "LANGUAGE | AFDELING INFORMATIEMANAGEMENT | CONTACT | LOGOUT". On the right side, there are two dropdown menus: "REGISTRATION" and "SUPPLIER".

Your preferred language is set to Dutch. If you want, you can change it to English by putting the cursor on TAAL (= language).

This screenshot is similar to the previous one, but the "LANGUAGE" link in the top navigation bar is highlighted with a red rectangular box.

**Note:** French and German are not yet active on the Develop Yourself Portal.





The name that appears in the screenshot below concerns the personal details entered with the e-mail address that is used to log in.

LANGUAGE | **FEBE VAN INGEN** | CONTACT | LOGOUT

When you click on CONTACT, you can opt for three different actions:

LANGUAGE | FEBE VAN INGEN | **CONTACT** | LOGOUT

- Complete the 'call me' form -> we will call you back
- Make telephone contact by calling the number shown
- Complete the e-mail form -> we will contact you

Call me	Contact
<p>Name <input type="text"/></p> <p>Telephone <input type="text"/></p> <p>Date <input type="text"/></p> <p>Time <input type="text"/></p> <p><input type="button" value="Send"/></p>	<p>Telephone: +31 418 68 8674 Open during office hours from 8:30 - 17:00 hours</p>
	<p>Email</p> <p>Name <input type="text"/></p> <p>Email <input type="text"/></p> <p>Telephone <input type="text"/></p> <p>Message <input type="text"/></p> <p><input type="button" value="Send"/></p>

### 1.3 Using online management

In portal management, under the 'Supplier' tab, you will find:

- FAQ
- Company characteristics
- Products
- Product resources
- Product groups
- Events
- Reports (Information provision for the supplier)
- Settings





## 2 Settings

It is recommended to start with the settings. These are details you often only have to enter once and they hardly ever need changing.

### 2.1 Parameters

Click on Settings - Parameters and the screen below appears.

The screenshot shows the 'Parameters' settings page. At the top, there are navigation tabs: 'BEHEERDER', 'LEVERANCIER', 'PLANNING', and 'SYSTEM ADMIN'. Below these, the 'Taal' (Language) dropdown menu is set to 'Nederlands'. A purple arrow points to this dropdown. The 'E-mail naar leverancier bij inschrijving door deelnemer' section contains four checkboxes: 'Melding bij nieuwe inschrijving nog zonder autorisatie', 'Melding bij afkeur inschrijving', 'Melding bij voorlopige afkeur inschrijving', and 'Inkoopmails onderdrukken'. The checkbox 'Verstuur dagelijkse notificatie met nieuwe afgeronde inschrijvingen' is checked. A purple arrow points to this checkbox. The 'Vraag die aan de deelnemer gesteld wordt tijdens het inschrijven' section has a checkbox 'Vraag standaard tonen tijdens inschrijven' and an empty text input field. The 'Producten en uitvoeringen onderhouden' section has a checkbox 'Docenten op roosterregelniveau weergeven'. The 'Aantal dagen na het verstrijken van de einddatum dat de status van inschrijvingen automatisch naar afgerond of te evalueren gezet mag worden' section has a checkbox 'Automatisch afronden actief' which is checked. A purple arrow points to this checkbox. Below it, the 'Aantal dagen na einddatum' is set to '4' in a text input field. A purple arrow points to this input field.

#### 2.1.1 Language

The default language is Dutch. You then enter the requested information. If you only offer Dutch-language products, you don't have to do anything. Don't forget to click on the red 'Save' button!

However, if you also offer English-language products, select English in the 'Language' field drop-down menu and repeat the above step. The language of the field names continues to be shown based on your standard language setting (see 1.2 General). You can switch very fast, for that matter, if you prefer.

#### 2.1.2 Daily notification with new subscriptions completed

If you do not want to receive daily reminders that an enrolment has been completed, you can uncheck the check box 'Send daily notification with new completed enrolments'. We advise you not to do this, as this way you will be informed when a participant has completed the product so that this can be entered in 'Training results'. This is further explained in section 4.4 'Enter Training Results'.

#### 2.1.3 Product and event maintenance

When you want to 'Show trainers per schedule line', you can tick the checkbox. However, we advise against this in the case of online product and event maintenance. This requires





additional maintenance. You also have to be aware of the GDPR legislation and your agreements about this with your trainers.

#### 2.1.4 Registration complete and ready for evaluation

If you do not want to complete every registration manually, tick the 'Automatically finish active' checkbox. You can also indicate the number of days after the final fulfilment day when this step must be completed. The default value is 0, but it should be changed to 4. The course participant will then receive an evaluation request from the customer portal on the final training day.

## 2.2 Countries

Click on 'Settings - Countries' and the screen below appears.

#	Name
<input type="checkbox"/>	Austria
<input type="checkbox"/>	Belarus
<input type="checkbox"/>	Belgium
<input type="checkbox"/>	Bosnie and Herzegovina
<input type="checkbox"/>	Brazil
<input type="checkbox"/>	Canada
<input type="checkbox"/>	China
<input type="checkbox"/>	Czech Republic
<input type="checkbox"/>	Denmark
<input type="checkbox"/>	Finland
<input type="checkbox"/>	France
<input type="checkbox"/>	Germany
<input type="checkbox"/>	Ghana
<input type="checkbox"/>	Hong Kong
<input type="checkbox"/>	Hungary
<input type="checkbox"/>	India
<input type="checkbox"/>	Ireland
<input type="checkbox"/>	Israel
<input type="checkbox"/>	Italy
<input type="checkbox"/>	Kenia

Page 1 of 2 (37 items) [1] 2

Save

Currently, the list contains 37 items. Tick the countries where the training will be held. Instead of navigating through pages, you can also find a country by typing in the preferred country in the search field. Don't forget to click on 'Save' after selecting one or more countries.





## 3 Company characteristics

The next step is to enter company details. This again is a once-only step, unless changes occur (following the relocation of a company for instance, or a change to a telephone number, etc.)

### 3.1 General

If you are a supplier and you can log into the Develop Yourself Portal, we have created the role of supplier for you in the portal. We will enter the details held on our records. We ask you to check them and supplement them, if necessary. Click on 'Edit' to start the process.

**SCHOUTEN & NELISSEN**

Leveranciersnaam :	Schouten & Nelissen	Straat :	Van Heemstraweg West 5
Postcode :	5301 PA	Plaats :	Zaltbommel
Land :	Nederland	Website :	http://www.sn.nl
E-mail algemeen :	info@sn.nl	Telefoon algemeen :	+31 (0)418 688666
E-mail inschrijving :	specialaccount@sn.nl	Telefoon inschrijving :	+31 (0)418 688666
E-mail presentie/certificering :			

Visie :

**Uw talent staat centraal**

Wij zetten uw persoonlijke ambitie en talenten centraal. Ook als u zelf nog niet of onvoldoende beseft dat u die heeft. Deze positieve invalshoek geeft u meer power om uw doelen te realiseren. Daarom stemmen we de training altijd op u persoonlijk af. Zo bent u verzekerd van een resultaat op maat.

**U leert continu, dus beter**

Wij kennen geen trainingen meer die uitsluitend klassikaal zijn. U leert immers het beste door continu te werken aan uw leerdoelen. Daarom krijgt u op verschillende momenten en in verschillende vormen inzichten en opdrachten aangereikt.

**U past direct toe in uw eigen praktijk**

U leert het beste op de plek waar u het geleerde wilt toepassen. Uw eigen werkomgeving. Onze trainers laten u daarom veel oefenen in de praktijk. Een praktijk die zij kennen, omdat u erover vertelt in het doelstellend gesprek. En omdat we vooraf vaak werken met 360 graden feedback van bijvoorbeeld collega's en leidinggevenden

**Wij werken met de beste trainers**

We zetten trainers in die onze visie begrijpen en voorop lopen in hun vak. Met hun persoonlijkheid weten zij individuen en groepen verder te brengen. Zij hebben toegang tot de nieuwste kennis, interventies en inzichten.

**Het effect is bewezen**

Onze aanpak bewijst zich iedere keer weer. Dat blijkt uit de evaluaties van de deelnemers. En het blijkt uit onafhankelijk onderzoek van de Universiteit Utrecht. Collega's en leidinggevenden geven aan dat ze ook na verloop van tijd blijvend effect zien van de training die mensen bij ons volgen.

[Wijzigen](#)

The requested information is self-explanatory. Fields we would like to see completed:

- E-mail general
- E-mail registration (the address where the purchase order will be e-mailed to)
- E-mail attendance/certification (the address where notifications of completed registrations will be e-mailed to)
- Logo (preferably png extension of approximately 600px)
- Vision

Do not forget to click to save after making a change.





Naam :	Schouten & Nelissen		
Straat :	Van Heemstraweg West		
Huisnummer :	5		
Huisnummer toevoeging :			
Postcode :	5301 PA	Plaats :	Zaltbommel
Land :	Nederland ▾	Website :	http://www.sn.nl
E-mail algemeen :	info@sn.nl	Telefoon algemeen :	+31(0)418 688666
E-mail inschrijving :	specialaccount@sn.nl	Telefoon inschrijving :	+31(0)418 688666
E-mail presentie/certificering :	<input type="text"/> <input type="button" value="Browse..."/>		

Visie :

**Uw talent staat centraal**  
Wij zetten uw persoonlijke ambitie en talenten centraal. Ook als u zelf nog niet of onvoldoende beseft dat u die heeft. Deze positieve invalshoek geeft u meer power om uw doelen te realiseren. Daarom stemmen we de training altijd op u persoonlijk af. Zo bent u verzekerd van een resultaat op maat.

**U leert continu, dus beter**  
Wij kennen geen trainingen meer die uitsluitend klassikaal zijn. U leert immers het beste door continu te werken aan uw leerdoelen. Daarom krijgt u op verschillende momenten en in verschillende vormen inzichten en opdrachten aangereikt.

**U past direct toe in uw eigen praktijk**  
U leert het beste op de plek waar u het geleerde wilt toepassen. Uw eigen praktijk is de plek waar u het geleerde wilt toepassen. Uw eigen praktijk is de plek waar u het geleerde wilt toepassen.

Opslaan

Annuleren

## 3.2 Billing address

When you click on 'Company characteristics – Billing address', the following page appears. Mandatory fields:

- Company name
- Invoicing per
- E-mail
- Address (preferably a PO box)
- VAT number
- KVK number





## Billing information

Company name	<input type="text" value="Schouten &amp; Nelissen"/>
Attn	<input type="text" value="Crediteurenadministratie"/>
First name	<input type="text"/>
Last name	<input type="text"/>
Invoicing per	<input checked="" type="radio"/> Email <input type="radio"/> Post
Email	<input type="text" value="crediteurenbeheer@sn.nl"/>
Telephone	<input type="text" value="0418 688 644"/>
Address	<input type="text" value="Postbus 266"/> <input type="text"/>
Zip code	<input type="text" value="5300 AG"/>
City	<input type="text" value="Zaltbommel"/>
Country	<input type="text" value="The Netherlands"/>
VAT number	<input type="text"/> <input type="checkbox"/> Company has no valid VAT number
Legal form	<input type="text"/>
KVK number	<input type="text"/>
IBAN	<input type="text"/>
BIC	<input type="text"/>
Invoice addition	<input type="text"/>

Save

Complete the other fields if so desired. Click on the red 'Save' button.





### 3.3 Contacts

When you click on 'Company characteristics - Contacts', the following screen appears.

Add contact person

Drag a column header here to group by that column

#	Name	I'd like to be addressed as	Business email	Business telephone number	Business mobile phone	Role

To add a Contact Person, click on the red 'Add contact person' button. Enter the requested values in the fields. In the 'Role' field, you must indicate the role of the contact person in relation to the Develop Yourself Portal.

The request is to enter at least two contact persons/roles for questions from Archipel about:

- operational management of the training products in the portal
- content of training products

Naturally, when these roles are united in a single person, you only have to enter one contact person.

Add contact person

Drag a column header here to group by that column

#	Name	I'd like to be addressed as	Business email	Business telephone number	Business mobile phone	Role

Prefix:

Middle name:

Suffix:

Business email:

Business mobile phone:

First name:

Last name:

I'd like to be addressed as:

Business telephone number:

Role:

## 4 Reports

Reports are intended for the supplier. Maintenance does not apply to this section. The overviews serve to give you information.

### 4.1 Registrations

When you click on 'Reports - Registrations', the following screen appears, listing all the registrations for your product range from the Develop Yourself Portal. In the red square in the screenshot below, you can search by a random value per column or you can select a value from the drop-down list by clicking on the arrow.

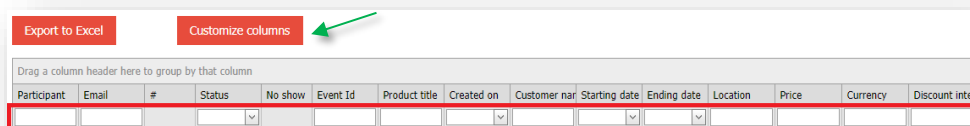
You can also sort by single columns. You can do this by clicking on the column title. An arrow tells you if sorting is ascending or descending. You can change the order of the columns by putting the cursor on a column field name and dragging it to the left or right.








Adding and removing columns is also an option. Click on the 'Customize columns' button. You can drag the column or columns you want to remove to the column list that has appeared. To add a column, drag the required column from the column list to the overview in the desired location.

Lastly, you can export the desired overview to Excel. Click on the appropriate button. Excel offers you several sorting and/or filter options and you can distribute your report internally.



In the case of a registration, you also see several icons:

- The red exclamation mark can be used to cancel a registration.
- The green bullet makes a registration final. In practice, this is not used.
- The thumb completes the registration. When something is not completed automatically, you have to click on this item for every registration to ensure the course participant receives the evaluation.

Deelnemer T Almere2	Dlinr2@sn.nl	  	Geautoriseerd	<input type="checkbox"/>	Coaching_24	Coaching	21-2-2017	Gemeente Almere					100,00	EUR
---------------------	--------------	---	---------------	--------------------------	-------------	----------	-----------	-----------------	--	--	--	--	--------	-----

## 4.2 Products in Search & Register

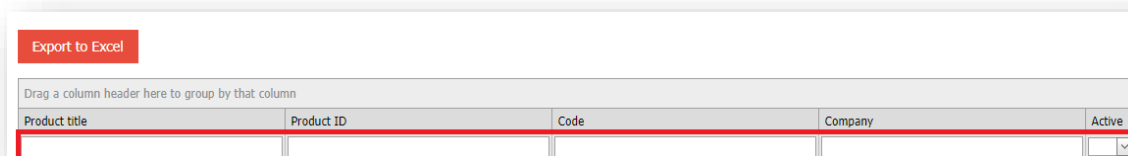
When you click on 'Reports – Products in Search & Register', the following list appears. This report shows which type of training is offered and in which customer portal. This gives you an idea of the customers and which products they have selected. In the red square, you can search by value or you can select a value from the drop-down list by clicking on the arrow.

Again, you can change the order of the columns by putting the cursor on a column field name and dragging it to the left or right. You cannot add or remove columns in this report.

You can also sort by single columns. You can do this by clicking on the column title. An arrow tells you if sorting is ascending or descending.

Lastly, you can export the desired overview to Excel. Click on the appropriate button. Excel offers you several sorting and/or filter options and you can distribute your report internally.





### 4.3 Products per system category

When you click on 'Reports – Products per system category', the following list appears for every system category. If you click on 'Export to Excel', you are shown an Excel document you can sort and filter. You have an overall list of the product ranges and the Main (category) products they are linked to.

#### Products per system category

Export to Excel					
Drag a column header here to group by that column					
Main Category	Category	Use as def	Product title	Active	IsVerwij
		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Coaching	Individuele coaching	<input type="checkbox"/>	Talentmeting (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Coaching	Coachingsopleidingen	<input type="checkbox"/>	Talentmeting (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Persoonlijke effectiviteit	Persoonlijke ontwikkeling	<input type="checkbox"/>	Talentmeting (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Opleiding & Onderwijs	Coaching	<input type="checkbox"/>	Talentmeting (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Persoonlijke effectiviteit	Persoonlijk leiderschap	<input type="checkbox"/>	Talentmeting (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Persoonlijke effectiviteit	Communicatieve vaardigheden	<input type="checkbox"/>	Beïnvloedingsvaardigheden (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Persoonlijke effectiviteit	Timemanagement	<input type="checkbox"/>	Beïnvloedingsvaardigheden (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Persoonlijke effectiviteit	Persoonlijk leiderschap	<input type="checkbox"/>	Beïnvloedingsvaardigheden (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vitaliteit & Gezondheid	Mindfulness	<input type="checkbox"/>	Mindfulness in één dag (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vitaliteit & Gezondheid	Stress	<input type="checkbox"/>	Mindfulness in één dag (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vitaliteit & Gezondheid	Vitaliteit	<input type="checkbox"/>	Mindfulness in één dag (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Persoonlijke effectiviteit	Persoonlijk leiderschap	<input type="checkbox"/>	Mindfulness in één dag (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Persoonlijke effectiviteit	Persoonlijk leiderschap	<input type="checkbox"/>	To the point communiceren (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Persoonlijke effectiviteit	Communicatieve vaardigheden	<input type="checkbox"/>	To the point communiceren (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communicatie	Externe communicatie	<input type="checkbox"/>	To the point communiceren (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communicatie	Omgaan met emotie	<input type="checkbox"/>	To the point communiceren (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communicatie	Feedback	<input type="checkbox"/>	To the point communiceren (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communicatie	Mondelinge communicatie	<input type="checkbox"/>	To the point communiceren (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Persoonlijke effectiviteit	Assertiviteit	<input type="checkbox"/>	Assertiviteit intensief (hbo) (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Persoonlijke effectiviteit	Communicatieve vaardigheden	<input type="checkbox"/>	Assertiviteit intensief (hbo) (ook virtueel)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Page 1 of 75 (1486 items) [1] 2 3 4 5 6 7 ... 73 74 75 Page size: 20

### 4.4 Entering training results

The report "Entering training results" is available in the Supplier menu under the Reporting tab.

FAQ	PRODUCT RESOURCES	REPORTS	SETTINGS
COMPANY CHARACTERISTICS	Accommodation package	Registrations	Parameters
General	Locations	Products in Search & Register	Countries
Billing address	PRODUCT GROUPS	Products per system category	
Contacts	EVENTS	Enter training results	
PRODUCTS			
Maintain			
Import			

Here the supplier has insight into the completed training courses for which a result can/should be entered. The results can be put down and changed in this overview.





☐ Also show registrations with already registered training result

Drag a column header here to group by that column

#	PO-number	Customer na	Employee na	Product	Event code	Starting date	Ending date	Result	Presence	Grade	Start date cer	End date cert	Certification
		Thales The Netherlands		Masterclass Psychologie in één dag									
		Thales The Netherlands		Masterclass Leiderschap en complexiteit									

The report has the following columns:

1. Mutation option for the line (this activates the selection box in the column result).
2. PO number
3. Customer name
4. Employee
5. Product name
6. Implementation code
7. Start date
8. End date
9. Result (obligatory). Here you can indicate what the result was. There are 3 options:
  - a. Passed, certificate applicable
  - b. Passed, no certificate applicable
  - c. Not passed
10. Grade. (optional) Here you can optionally enter the grade obtained (2 digits after the comma)
11. Attendance (mandatory). Here you can indicate whether the participant has been (sufficiently) present: Yes/No.
12. Start date certificate (compulsory and only to be filled in if result is equal to 'passed certificate'). Here you can enter the start date.
13. End date of certificate (optional and only to be filled in if result is equal to 'certificate passed'). The end date can be entered here.
14. Upload certificate (optional and only to be filled in if result is equal to 'certificate passed'). If there is a certificate, one pdf can be uploaded here.

The overview only shows completed registrations (Authorised, Final, To be evaluated and Completed) on products for which no result or attendance has been entered yet. You can only enter an end date for a registration once the end date has passed. For registrations without a start or end date, only the status of the registration applies.

It is also possible to view and modify the rules for which results have already been entered by expanding/removing the selection. If the result has been entered and the status was 'authorised' or 'final' it will be changed to 'completed' or (if there is an evaluation form) 'to be evaluated'.

### Entering results in bulk

There is a possibility to enter results in bulk. You can select multiple lines and 'process' these in one go by clicking on the button 'Bulk Results Edit'. A layover will then appear where you can fill in the relevant data in the same way as you would fill in an individual line. The message OK, means that for the selected rules the filled results from the lay-over are written to these rules.





## 5 Product resources

Under 'Product resources', you can document master data you need to enter training courses/products. You have to document these, if relevant, before creating a product range via 'Products - Maintain'.

### 5.1 Types of packages (changes in Price Elements)

Apart from the standard prices elements, you can also enter additional price elements to determine a price for a training course per course participant. You create a master data list for additional price elements.

Standard type of package/price elements for a training course/product:

- Product price
- Examination price
- Subsidy price

Example additional type of package/price elements:

- Day package
- Dinner
- Accommodation
- Lunch
- Training materials

To set up additional price elements in the master data list, click on 'Product resources – Accommodation package'. The following screen appears.

The screenshot shows a red 'Add' button with a green arrow pointing to it. Below the button is a table with the following headers: #, ExtAccommodationPackageID, Accommodation package title, and Short description. The table is currently empty.

Click on the red 'Add' button to create an additional price element.

- **ExtAccommodationPackageID:** An ID is always a unique value.
- **Accommodation package title:** Description of ExtArrangementTypeID.
- **Short description:** Additional text about package/price element can be included here.
- **Save:** Use the appropriate icon (the green arrow in the example below).

The screenshot shows a form with the following fields: ExtAccommodationPackageID: Overnight stay, Accommodation package title: Overnight stay, and Short description: Until 8 days before the first meeting, you can cancel your reservation. A green arrow points to the save icon (a green arrow) in the bottom right corner.





## 5.2 Locations

To be able to link fulfilments to a venue, a master data list of all location options must be created. To create this list, click on 'Product resources - Locations'. You are taken to the page shown below.

A red 'Add' button is highlighted with a green arrow. Below it is a table with the following columns: #, ExtAccommodationID, Address, Description accommodation, Zip code, Email, City, Telephone, and Active. The table is currently empty.

Click on the red 'Add' button to create a venue.

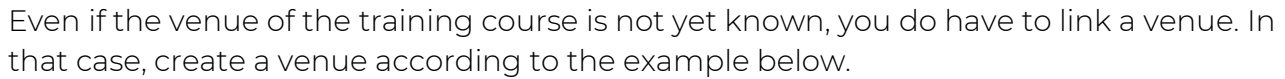
The 'Add' form is shown. It contains the same table as above, but with a form below it for entering data. The form fields are: ExtAccommodationID, Address, Description accommodation, Zip code, Email, City, Telephone, GeoLongitude, GeoLatitude, and Location description. The 'Active' checkbox is also present. A green arrow points to the 'Active' checkbox, and another green arrow points to the 'Save' icon (a blue square with a white 'S') at the bottom right.

Field name	Data	Additional Information
ExtAccommodationID	Mandatory	An ID is always a unique value
Description accommodation	Mandatory	Name of the venue/building/hotel
E-mail	Not mandatory	General e-mail address of the venue
Telephone	Not mandatory	General telephone number of the venue
Address	Recommended	Visiting address of the venue*
Zip code	Recommended	Postcode visiting address of the venue
City	Mandatory	Locality of the venue
Country	Mandatory	Country where the venue is located
GeoLongitude	Do not fill	Field will be removed
GeoLatitude	Do not fill	Field will be removed
Location description	Not mandatory	Additional desired information about the venue
Active	Mandatory	Tick to activate venue
Save	Mandatory	Click on the 'Save' icon

\*Please note: use the official spelling of a place name. Do not enter your own additions in the field. The reason for this is that potential course participants can filter by place name when looking for a course. When in doubt, use

<https://www.postnl.nl/adres-zoeken/>.





## 6 Products

After completing the steps under 5, 'Product resources', you can start entering the training products.

## 6.1 Maintain

Click on 'Products - Maintain'. Now click on the red 'Add product' button.

The following page will open.

Versie 9.0





### 6.1.1 General

Field name	Data	Additional Information
Product ID	Mandatory	Unique ID (can be the same as Code)
Code	Mandatory	Unique code
Product title	Mandatory	Title of the training course
Product URL	Mandatory	Tip: choose a URL that does not change
Planning type	Mandatory	Select a value from the drop-down list (usually, 'Only scheduled fulfilments')
Language	Mandatory	Select training language
Active	Mandatory	Tick if training is topical
Finish automatically	Mandatory	You are advised to always tick this
Manual maintenance	Mandatory	Only tick this box when you add products manually apart from the Edudex upload!
Minimum number of seats	Mandatory	Minimum number of course participants
Maximum	Mandatory	Maximum number of course participants
Product type	Mandatory	Select a value from the drop-down list
Type of intervention	Mandatory	Select a value from the drop-down list
Level at completion	Mandatory	Select a value from the drop-down list
Study hours	Mandatory	Number of hours of training + hours of independent study
Show question	Mandatory	<p><b>Use default</b> = default value and ensures the question filled under 2.1.3 is copied.</p> <p><b>Yes</b> = question specifically intended for the product you are entering. The text of the question is entered under 'Registration comment'.</p> <p><b>No</b> = question filled under 2.1.3 is not copied. Registration comment does not have to be filled.</p>
Registration remark	Not mandatory	See explanation under 'Show question'
Internal remark	Not mandatory	When this field is filled, the included text will appear on the purchase order.
Currency	Mandatory	The default value is EUR
Product price	Mandatory	Enter the amount
Product VAT %		
Product VAT	Fill if relevant	Enter the amount
Exam mandatory	Fill if relevant	Enter the amount
Exam price	Fill if relevant	Enter the amount
Exam VAT %	Do not fill	
Exam VAT amount	Fill if relevant	Enter the amount
Subsidy price	Fill if relevant	Enter the amount (not a minimum amount)
Subsidy VAT %	Do not fill	
Subsidy VAT amount	Not mandatory	Enter the amount (not a minimum amount)
Image	Recommended	Upload an image (this creates a nice presentation on the customer side)
Save:	Mandatory	Click on the red 'Save' button





After the final step, the following page appears. The various tabs ask you for additional product information.

**Product: Test title** Copy product

Main Accommodation package Categories Level Competencies Texts

Product ID: Test Planning type: Scheduled events

Code: Test Language: Dutch

Product title: Test title

Product URL:

Active: ☒ Manual maintenance: ☒

Finish automatically: ☒

Minimum number of seats:

Product type: Skills Training Type of intervention: Open enrollment

Level at completion: Unknown Study hours:

Show question: Use default Internal remark:

Registration remark:

Currency: EUR; € Exam mandatory: ☐

Product price:

Product VAT %:

Product VAT:

Subsidy price:

Subsidy VAT %:

Subsidy VAT amount:

SCHOUTEN & NELISSEN

Save

Back to the report

## 6.1.2 Packages

Tab: Accommodation Packages

Under this tab, you enter additional price elements for the product. Under '*Product resources – Accommodation packages*', you created a master data list for this.

Open the 'Accommodation package' tab and the following screen appears. First, enter the correct quantity before clicking on the red 'OK' button.





Product: Test title Copy product

Main Accommodation package Categories Level Competencies Texts

1 Add accommodations Ok

Remove	Accommodation description	Part of the price	VAT percentage	VAT amount	Mandatory	Date	Accommodation package
<span>Save</span>							
<span>Back to the report</span>							

Product: Test title Copy product

Main Accommodation package Categories Level Competencies Texts

1 Add accommodations Ok

Remove	Accommodation description	Part of the price	VAT percentage	VAT amount	Mandatory	Date	Accommodation package
<span>✖</span>	-	0	0	0	<input type="checkbox"/>		
<span>✖</span>	-	0	0	0	<input type="checkbox"/>		
<span>✖</span>	-	0	0	0	<input type="checkbox"/>		
<span>✖</span>	-	0	0	0	<input type="checkbox"/>		
<span>Save</span>							
<span>Back to the report</span>							

Field name	Data	Additional Information
Accommodation description	Mandatory	Free field (as brief as possible)
Part of the price	Mandatory	Price of the element
VAT percentage	Do not fill	
VAT amount	Fill if relevant	VAT amount on element price
Mandatory	Mandatory	Tick in the case of compulsory purchase
Date	Not mandatory	Fill if the product is linked to a specific date and is <u>NOT</u> mandatory
Accommodation package	Mandatory	Select from the drop-down list





### 6.1.3 Categories (Mandatory)

The product can be linked to a category under the 'Categories' tab. Click on the relevant Main Category (see the list in red in the next screenshot = NRTO/Vetron documented values). When you click on the relevant value, a list of categories will appear, associated with the selected Main Category, which you can tick. Click on the red 'Save' button.

#### Note:

Only relevant categories can be linked to a single product. For suppliers who use Edudex, the link to a category is made based on documented keywords. However, the <theme> field must be filled in the Edudex standard in order to determine the Main Category or Categories. If this is not the case, the product range will not be visible when this filter is used in a customer portal!

Suppliers who use Edudex can also link a category or categories through online management. During the daily update of Edudex, the documented value or values are not overwritten.

Product: Test title

Copy product

Main Accommodation package Categories Level Competencies Texts

Show selected categories

- Health & Safety
- Automation & IT
- Coaching
- Communication
- Finance
- Human Resources
- Procurement & Logistics
- Internet & Media
- Legal
- Quality & Project management
- Management
- Marketing
- Training & Education
- Personal effectiveness
- Manufacturing, engineering and construction
- Sales
- Secretarial & Administration
- Language courses
- Vitality & Health

Save

Back to the report

Example Sub-Categories under Personal Effectiveness:

Product: Test title

Copy product

Main Accommodation package Categories Level Competencies Texts

Show selected categories

- Health & Safety
- Automation & IT
- Coaching
- Communication
- Finance
- Human Resources
- Procurement & Logistics
- Internet & Media
- Legal
- Quality & Project management
- Management
- Marketing
- Training & Education
- Personal effectiveness
- Manufacturing, engineering and construction
- Sales
- Secretarial & Administration
- Language courses
- Vitality & Health

- ☐ Assertiveness
- ☐ Communication skills
- ☐ Creativity
- ☐ Emotional intelligence
- ☐ Neuro Linguistic Programming (NLP)
- ☐ Personal development
- ☐ Personal effectiveness
- ☐ Personal leadership
- ☐ Time management

Save

Back to the report





### 6.1.4 Level

Under the 'Level' tab, you can indicate the level of the training on offer. Select the correct value and click on the red 'Save' button.

Product: Test title

Copy product

Main Accommodation package Categories Level Competencies Texts

☐ Associate degree  
☐ Bachelor  
☐ Doctoral  
☐ HAVO/MBO  
☐ HBO  
☐ Lower general secondary education  
☐ Lower Vocational Education  
☐ Master

Save

Back to the report

### 6.1.5 Competencies

Tick a maximum of five competencies.

### 6.1.6 Texts

The substantive text about the training can be placed here. In the 'Recap' field, you can place a brief text, which will be shown on an overview page underneath the image uploaded for each product. In short, a text that will trigger a potential course participant. We recommend including at least the following elements in the 'Full description' field: Content, Result and Target Group.

*Note: in both fields, you can place text for a lovely presentation on the customer side using the menu in the field.*

Product: Test title

Copy product

Main Accommodation package Categories Level Competencies Texts

Language Dutch

Product title Test title

Recap

Full description

Save

Back to the report





After completing 6.1.5, click on the red 'Save' button and return to the list by clicking on the appropriate button. When you have entered multiple products, you are shown a list as the one below.

Product IDCode	Product title	Events
SCBATH	SummerCamp Assertiviteitstraining intensief (hbo)	
ATTT	Assertiviteit kort en krachtig (ook virtueel)	
ATTM	Assertiviteit intensief (mbo) (ook virtueel)	
ATTH	Assertiviteit intensief (hbo) (ook virtueel)	
ATTD	Assertiviteit in één dag (ook virtueel)	
01012980	NHAS Assertiviteit Online met coach	
01012877	DDD Assertiviteitstraining Kort en krachtig	
01012588	ATTC Assertiviteitstraining intensief I met persoonlijke coach	
01012586	ATTO Assertiviteit opfrustraining met coaching	
01011454	ATT_N Assertiviteitstraining Intensief (hbo)	
01011280	ATTDAG Assertiviteit in één dag	
01010877	DDD Assertiviteitstraining I kort & krachtig	
01010070	LC_O Assertiviteitstraining I e-learning	
01006386	ATT Persoonlijke effectiviteit: assertiviteitstraining	
01006349	CDD Assertiviteitstraining Intensief (mbo)	

You can now opt to add Fulfilments for each product. The functionality is the same as described under 7, 'Events'. However, the product is already preselected.

## 6.2 Import

This functionality is useful only for suppliers who upload their product range via Edudex.

#	Typename	Import typename
1	ProductgroepType	

Explanation of fields:

- Product Web Service URL: this is a mandatory field. It is the Edudex URL on an institutional level.
- E-mail error message: this is a mandatory field and must be filled with the e-mail address of the supplier where the error message can be sent to. If a supplier receives an error





message, action must be taken, namely, the cause must be found and the error must be resolved.

- Import last executed: this field is automatically filled with the last date on which the upload was completed. This is, in fact, the import log.
- Start time automatically import: this field must be filled with a night-time hour. This must be after the export to Edudex is completed if you have automated this process as a supplier.
- Deactivate all current products: we recommend ticking this checkbox. This ensures the training courses on offer are cleaned up. Products that are no longer offered via Edudex are automatically disabled.
- Import mapping: do not use or only in consultation with the Partner Manager of Archipel.

## 7 Events

Go to the menu and click on 'Events'. This will open the following page. Via the drop-down list in the 'Product' field, you can select the training course for which you wish to create a fulfilment.

Product

Start date as of

Location

Employee

Ending date until and including

Description accommodation

Planning type

After selecting the product, the red 'Add event' button appears. Do not fill the other fields before clicking on this button.

Product

01006260; STRA; Strategisch denken

Start date as of

Location

Employee

Ending date until and including

Description accommodation

Planning type

Add event

Search

### 7.1 Events

Next, the following page appears. Values from fields you have entered under 6.1.1, 'Products - General', have been copied. If a specific fulfilment has a different price, you can enter it in the appropriate fields. You will overwrite the prices you entered on a product level. If this is not the case, you will only fill the following fields (green square screenshot below):

- ID = Unique ID of the fulfilment, i.e. not that of the product. It can be the same as the fulfilment code.
- Code = A unique code. If you do not use unique codes for fulfilments as a supplier, we recommend composing it as follows:
  - *<product code>*
  - *<year>*
  - *<fulfilment number>* Example in screenshot below STRA1901





- Starting date
- Ending date
- Location (use the drop-down button => choose from the master data list of locations created under 5.2, 'Product resources - Locations').

Save the entered values by clicking on the red 'Save' button (green arrow screenshot below).

**Product: Strategisch denken**

Events | **Schedule** | Accommodation package

ID	STRA1901	Currency	EUR; €
Code	STRA1901	Event price	0
Product	01006260; STRA; Strategisch denken	Event VAT %	0.00
Number of seats available	12	Event VAT price	0
Minimum number of seats	4	Subsidy price	0
maximum	12	Subsidy VAT %	0
Study hours	36	Subsidy VAT amount	0
Starting date	7/14/2020	Exam price	0.00
Ending date	7/14/2020	Exam VAT %	0.00
Location	RTWTC; Beurs-WTC Congress & Event Center; Ro	Exam VAT amount	0.00
Internal remark			

Active ☒  
Registration is possible ☒  
Exam mandatory ☐  
Trainers

Drag a column header here to group by that column

#	First name	Last name	Business email
<input type="checkbox"/>	Coach	Aaltsje (SN)	
<input type="checkbox"/>	Coach	Alissa (SN)	
<input type="checkbox"/>	Coach	Angela (SN)	
<input type="checkbox"/>	Coach	Anita (SN)	
<input type="checkbox"/>	Coach	Ankie (SN)	
<input type="checkbox"/>	Coach	Anne (SN)	
<input type="checkbox"/>	Coach	Anne (SN)	
<input type="checkbox"/>	Coach	Anne-Else (SN)	
<input type="checkbox"/>	Coach	Annette (SN)	
<input type="checkbox"/>	Coach	Aveline (SN)	

Page 1 of 8 (80 items) [1] 2 3 4 5 6 7 8

**Save**

**Back**

After the event is saved, the 'Schedule' and 'Accommodation package' tabs become active and will be filled.





## 7.2 Schedule

Under the 'Schedule' tab, you first enter the number of lines you wish to create, including the start and end dates, then click on OK.

Product: Strategisch denken

Events Schedule Accommodation package

1 Add lines Ok

Remove	Date	Start time	Ending time	Location	Grouping

Save

Back

The start and end dates and the selected location for the fulfilment will be copied. Enter the intervening dates of timetable days. If relevant, you can change the location on each timetable line. You can still only choose from the documented master data list of locations under 5.2, 'Product resources - Locations'.

For Start and End Times, default values are shown which you can change to the actual values. The 'Grouping' field does not have to be filled. After filling this block with the desired values, you save the information via the appropriate button (green arrow).

Product: Strategisch denken

Events Schedule Accommodation package

1 Add lines Ok

Remove	Date	Start time	Ending time	Location	Grouping
✖	7/14/202	9:00 A	5:00 P	RTWTC; Beurs-WTC Congress & Event Ce	
✖		9:00 A	5:00 P	RTWTC; Beurs-WTC Congress & Event Ce	
✖		9:00 A	5:00 P	RTWTC; Beurs-WTC Congress & Event Ce	
✖		9:00 A	5:00 P	RTWTC; Beurs-WTC Congress & Event Ce	
✖		9:00 A	5:00 P	RTWTC; Beurs-WTC Congress & Event Ce	
✖	7/14/202	9:00 A	5:00 P	RTWTC; Beurs-WTC Congress & Event Ce	

Save

Back





## 7.3 Accommodation package

The final step is to open the 'Accommodation package' tab. This tab contains the values documented under 6.1.2, 'Products – Accommodation package'. If these values do not apply to the fulfilment you are entering, you can change them (see the explanation under 6.1.2).

Product: Strategisch denken

Events Schedule Accommodation package

1 Add accommodations Ok

Remove	Accommodation description	Part of the price	VAT percentage	VAT amount	Mandatory	Date	Accommodation package
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Save

Back

## 8 Product groups

Suppliers should only set up this section when another discount percentage has been contractually agreed on for part of the product range. The standard discount percentage is set up by the Partner Manager of Archipel.

Click on 'Product Groups', which will open the following screen.

University

Add Remove

Assigned products Assign products

Search :

Search on

Page 1 of 2 (37 Products) [1] 2

ActiveProduct IDCodeProduct title Remove





First, click on the red 'Add' button. The following page appears. Give a name to the product group you wish to create and click on the 'Save' button.

Add product group

Name :

Save

Then go to the 'Assign products' tab to link the product range subject to a different discount percentage than the standard value to the Product Group you have just created. Products can be found fast by using:

- Search field (Find)
- Filter (right-hand column)

University

Clear search

Categories

Health & Safety

- ☐ Company emergency services
- ☐ Environment
- ☐ General
- ☐ Prevention
- ☐ Safety
- ☐ Safety, Health and Environment Certification

Automation & IT

- ☐ Business intelligence (BI)
- ☐ ERP / CRM
- ☐ General
- ☐ Information management
- ☐ IT Security
- ☐ Microsoft
- ☐ Service management

Coaching

- ☐ Coaching courses
- ☐ General
- ☐ Personal coaching
- ☐ Team coaching

Communication

- ☐ Advisory skills
- ☐ Communication
- ☐ Dealing with emotion
- ☐ External communication
- ☐ Feedback
- ☐ Influencing skills
- ☐ Internal communication

Finance

- ☐ Accountancy
- ☐ Banking
- ☐ Business Economics
- ☐ Controlling
- ☐ Finance
- ☐ Financial administration
- ☐ Financial advisor

Human Resources

- ☐ Absenteeism
- ☐ Burn out
- ☐ Confidential advisor
- ☐ Employment law
- ☐ HR conversation techniques
- ☐ Human Resource Management (HRM)

Add

Remove

Assigned products

Assign products

Search :

Search on

Page 1 of 28 (689 Products) [1] 2 3 4 5 6 7 ... 26 27 28 >

Selected	Active	Product ID Code	Product title
<input type="checkbox"/>	<input checked="" type="checkbox"/>	NHKS	Aaargh... keuzestress! Online met coach
<input type="checkbox"/>	<input type="checkbox"/>	01006327 AGN	Actiegericht notuleren
<input type="checkbox"/>	<input type="checkbox"/>	01006261 ADV	Adviesvaardigheden Intensief
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ADVI ADVI	Adviesvaardigheden intensief (ook virtueel)
<input type="checkbox"/>	<input type="checkbox"/>	01008493 M3	Adviseren over opleiden en leren
<input type="checkbox"/>	<input type="checkbox"/>	01012858 ASP	Agile en Scrum in projecten
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ASPR	Agile en Scrum in projecten (ook virtueel)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	LWBM3 LWBM3	Agile HR
<input type="checkbox"/>	<input type="checkbox"/>	01013026 SS-AGI	Agile introductie (ook virtueel)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	POAI	Agile introductie (ook virtueel)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ALAC ALAC	Agile leiderschap A-coaching basic (ook virtueel)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ALBC ALBC	Agile leiderschap B -Agile coaching advanced
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ALCA ALCA	Agile leiderschap C -Agile transformatie
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ALDW ALDW	Agile leiderschap D -Wendbaar door zelforganisatie
<input type="checkbox"/>	<input type="checkbox"/>	01013037 ALC	Alchemy (CRR Global)
<input type="checkbox"/>	<input type="checkbox"/>	01006703 KAN-2	Algemeen kwaliteitsmanagement en auditing
<input type="checkbox"/>	<input type="checkbox"/>	01006511 BARB	Arbo voor de OR   basistraining
<input type="checkbox"/>	<input type="checkbox"/>	01011280 ATTDAG	Assertiviteit in één dag
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ATTD ATTD	Assertiviteit in één dag (ook virtueel)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ATTH ATTH	Assertiviteit intensief (hbo) (ook virtueel)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ATTM ATTM	Assertiviteit intensief (mbo) (ook virtueel)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ATTT ATTT	Assertiviteit kort en krachtig (ook virtueel)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01012980 NHAS	Assertiviteit Online met coach
<input type="checkbox"/>	<input type="checkbox"/>	01012586 ATTO	Assertiviteit opfrustraining met coaching
<input type="checkbox"/>	<input type="checkbox"/>	01010070 LC_O	Assertiviteitstraining   e-learning





You can then link a product to a product group by:

- Selecting the correct product group (if multiple were created)
- Ticking 'selected' under the desired product or products.

The screenshot shows the 'University' section of the Archipel Academy Partner Manager. A green callout bubble points to the 'University' header with the text 'Select the correct product group'. Below this are 'Add' and 'Remove' buttons. A tabbed interface shows 'Assigned products' and 'Assign products'. A search bar with a 'Search on' button is present. A green callout bubble points to the 'Check' button. The table below shows the product list.

Selected	Active	Product ID	Code	Product title
<input checked="" type="checkbox"/>	<input type="checkbox"/>	NHKS		Aaargh... keuzestress! Online met coach

Note: the discount percentage associated with the product group is entered by the Partner Manager. Send the entered product group or groups and the contractually agreed discount percentage to [partnermanagement@archipel.academy.nl](mailto:partnermanagement@archipel.academy.nl)