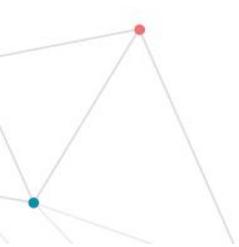




# Enterprise Administrator Guide

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**Consultation Manager**

**P** 1300 850 058

**E** [enquiries@consultationmanager.com](mailto:enquiries@consultationmanager.com)

PO Box 1217

New Farm, QLD, 4005

**W** [consultationmanager.com](http://consultationmanager.com)

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## Welcome to Consultation Manager!

### General Overview

Consultation Manager is a multi-relational database, intended to support the management of stakeholder and community engagement data.

This document is designed to provide general guidance on using stakeholder relationship management software, Consultation Manager, at an Enterprise Administrator level. This guide is best read in conjunction with our General User Guide for a comprehensive view of all aspects of the system.

Each system has a tailored framework to suit your organizations needs and reporting outputs. This guide will help you create and adapt this framework as project needs change.

Please note that this guide is based on a basic 'out of the box' system and may appear differently to yours if your system has some customisations.

### Support

Consultation Manager has a dedicated support team to assist with any product questions or concerns. They can be contacted during business hours, Monday – Friday, on a variety of channels.



Email: [support@consultationmanager.com](mailto:support@consultationmanager.com)



Live Chat: <http://consultationmanager.com/>



Phone: 1300 850 058



Self Help: <https://support.consultationmanager.com.au/support/solutions>

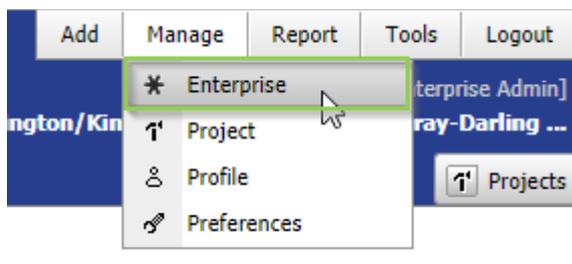
## Enterprise Administrator role and responsibilities

Enterprise Administrators hold full system administrative rights and can create, modify, remove, and manage all aspects of the system.

This includes but is not limited to: project creation, segregation and framework allocation of stakeholder groups, stakeholder distribution lists, property groups, property distribution lists, event types, issues and document folders.

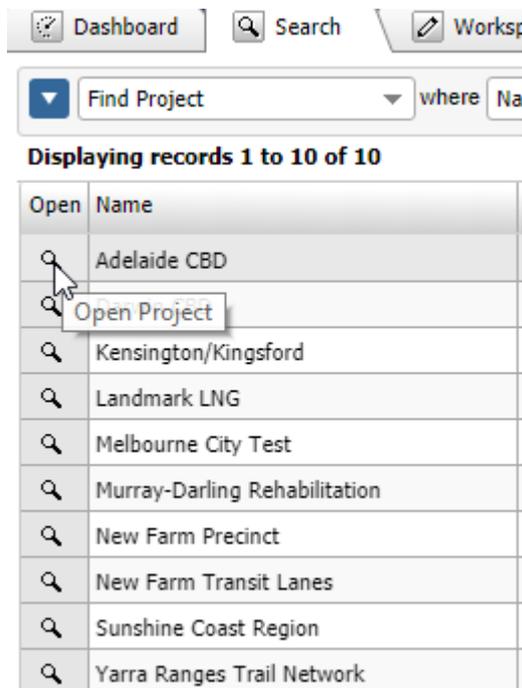
In addition, Enterprise Administrators are responsible for creating new team members in the system and issuing credentials.

You can perform most functions as an Enterprise Administrator by going to the Manage menu on the 'Command Bar' at the top right side of the screen, and down to Enterprise.



 *Hint: This guide will refer to this screen frequently as 'Manage Enterprise'.*

You can perform functions on a specific Project by going to the Manage menu on the 'Command Bar' and down to Project. This will open a list of Projects for you to select from.



 *Hint: This guide will refer to this screen frequently as 'Manage Project'.*

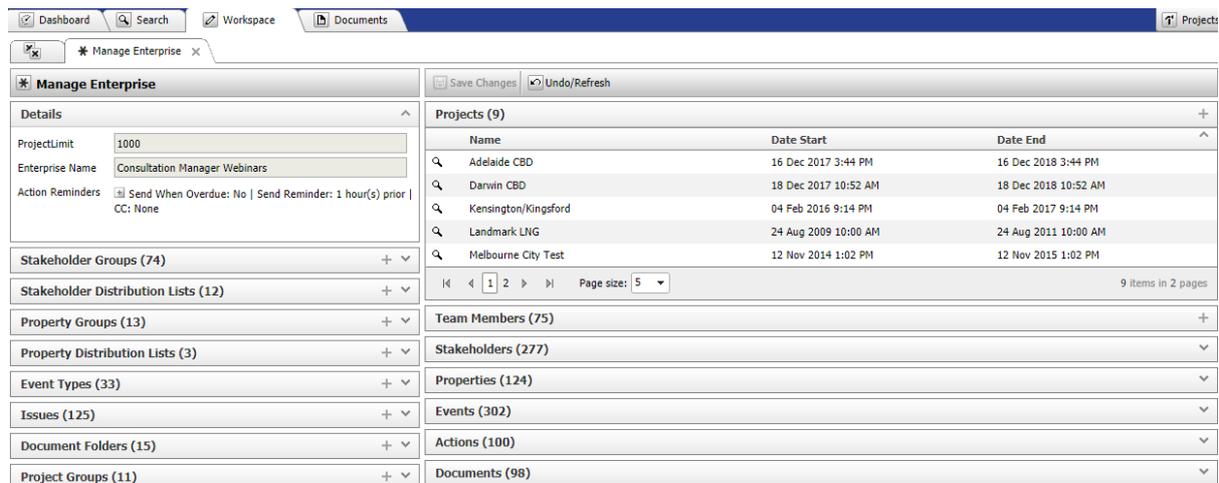
## Projects

Enterprise Administrators are the only users who can create a new Project or Project Group in the system.

### Components of a Project

The structure of a Project is broken down into many different aspects which can be accessed via the 'Manage Enterprise' screen.

On the 'Manage Enterprise' screen you can see a comprehensive view of all entities within the system, as well as what we refer to as the 'Framework' which includes all the Groups and Types.



The screenshot shows the 'Manage Enterprise' screen. On the left, a sidebar lists various entity counts: Stakeholder Groups (74), Stakeholder Distribution Lists (12), Property Groups (13), Property Distribution Lists (3), Event Types (33), Issues (125), Document Folders (15), and Project Groups (11). The main area displays a table of Projects (9) with columns for Name, Date Start, and Date End. The table lists projects such as Adelaide CBD, Darwin CBD, Kensington/Kingsford, Landmark LNG, and Melbourne City Test. Below the table, there are expandable sections for Team Members (75), Stakeholders (277), Properties (124), Events (302), Actions (100), and Documents (98).

Name	Date Start	Date End
Adelaide CBD	16 Dec 2017 3:44 PM	16 Dec 2018 3:44 PM
Darwin CBD	18 Dec 2017 10:52 AM	18 Dec 2018 10:52 AM
Kensington/Kingsford	04 Feb 2016 9:14 PM	04 Feb 2017 9:14 PM
Landmark LNG	24 Aug 2009 10:00 AM	24 Aug 2011 10:00 AM
Melbourne City Test	12 Nov 2014 1:02 PM	12 Nov 2015 1:02 PM

### Stakeholder Groups

Stakeholder Groups are a way to categorise your Stakeholders and where their interests might lie. Some common examples of Stakeholder Groups include: Local businesses, Charities, Schools etc.

### Stakeholder Distribution Lists

Stakeholder Distribution Lists are a way to make sure your Stakeholders are receiving any communications from your organisation they've expressed interest in. Some common examples of Stakeholder Distribution Lists include: Project Updates, Email lists etc.

### Property Groups

Property Groups act very similarly to Stakeholder Groups but for Properties. They're a way to categorise and reflect the interests of a Property. Some common examples of Property Groups include: Residential, School zone, Commercial etc.

### Property Distribution Lists

Property Distribution Lists act very similarly to Stakeholder Distribution lists but for Properties. They are a way to make sure Properties in your system are receiving any communication relevant to them from your organisation. Some common Property distribution lists include: Project works notifications, SMS updates etc.

## Event Types

Event Types are a way to indicate how your Stakeholders are interacting with your organisation. These are a mandatory field when users are creating an Event and as such are an integral aspect to setting up a Project. Some common examples of Event Types are: Email, Phone Call, Meeting etc.

## Issues

Issues are commonly associated with negative connotations – however in this sense they are more used to indicate the topics of conversations you’re having with your Stakeholders regarding your Project. Issues are also a mandatory field when users are creating an Event and as such are an integral aspect to setting up a Project. Some common examples of Issues are: Noise, Dust, Accessibility etc.

## Document Folders

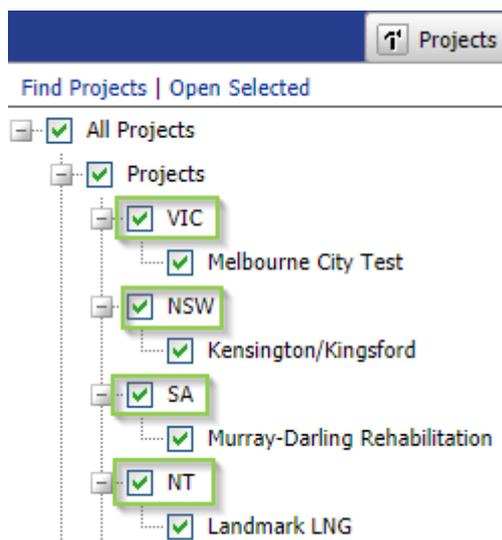
Document folders act very similarly to document folders on your computer. They are a way to organise and categorise any documents that are uploaded into your system so they can easily be found.

 *Hint: If you have some customisations of Groups or Types in your system, this is where they will appear.*

## Creating a Project Group

Projects groups are an excellent way to group your Projects together. Think of them as a type of folder to categorise your Projects, for example, by location or by type of Project.

Project groups are most commonly seen in the Project tree and are highlighted in green:



To create a new Project Group, go to 'Manage Enterprise' as instructed at the start of this guide.

Look for, and click on, the "+" button on the Project Groups panel.

✖ Manage Enterprise ✕

**\* Manage Enterprise** Save Char

**Details** ^

ProjectLimit: 1000

Enterprise Name: Consultation Manager Webinars

Action Reminders:  Send When Overdue: No | Send Reminder: 1 hour(s) prior | CC: None

Stakeholder Groups (74) + v

Stakeholder Distribution Lists (12) + v

Property Groups (13) + v

Property Distribution Lists (3) + v

Event Types (33) + v

Issues (125) + v

Sentiment (5) + v

Document Folders (15) + v

**Project Groups (11)** + v

- Projects
- Waste Management

**Add Project Groups**

Projects (9)

Adela

Darwi

Kensi

Landr

Melbc

Team Men

Stakehold

Properties

Events (30

Actions (1

Document

This will create a pop-up menu where you can add the details of your new Project Group.

**Add Project Groups** ✕

➕ Add New

**Details** ^

Type Category: Project Group

**Name** 1

**Group Under** 2 [none]

**Description** 3

Create | Continue | Add Another

- Projects
  - ACT
  - NSW
  - NT
  - Projects
  - QLD
  - SA
  - TAS
  - VIC
  - WA
- Waste Management

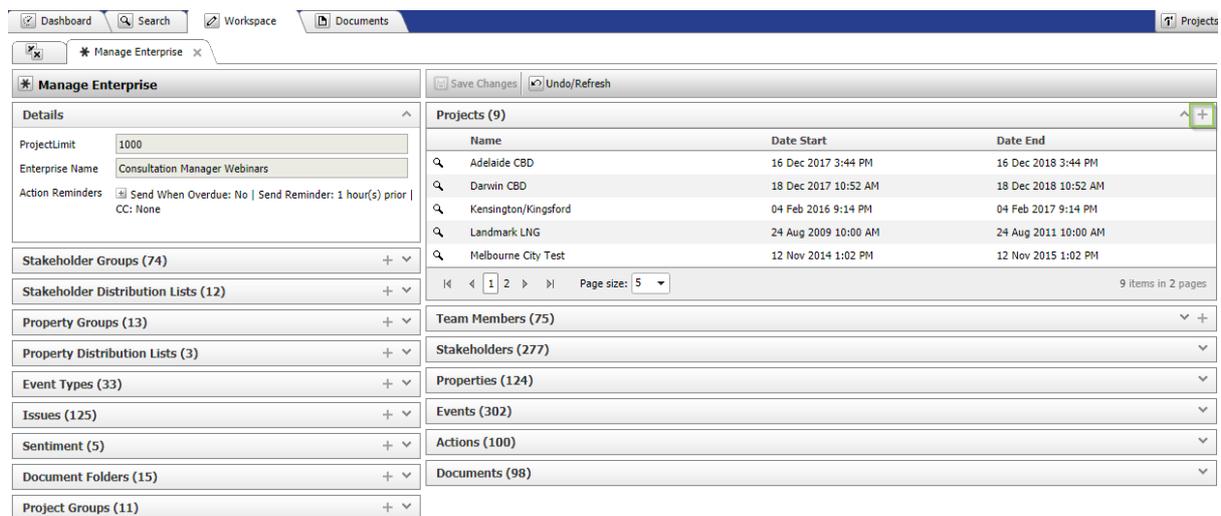
1. Name: This is where you designate the name of your Project Group

2. **Group Under:** This is where you can choose to put your Project Group under another Project Group. For example, if you wanted to break QLD down further into particular regions. You can leave this blank if you do not wish to add your Project to a Project Group.
3. **Description:** This is where you can add a brief explanation of the Project Group's purpose.

Once you've populated your details, click 'Create' and 'Continue'. This will open the new Project Group into the Workspace where you can edit or add Projects under it directly.

## Creating a Project

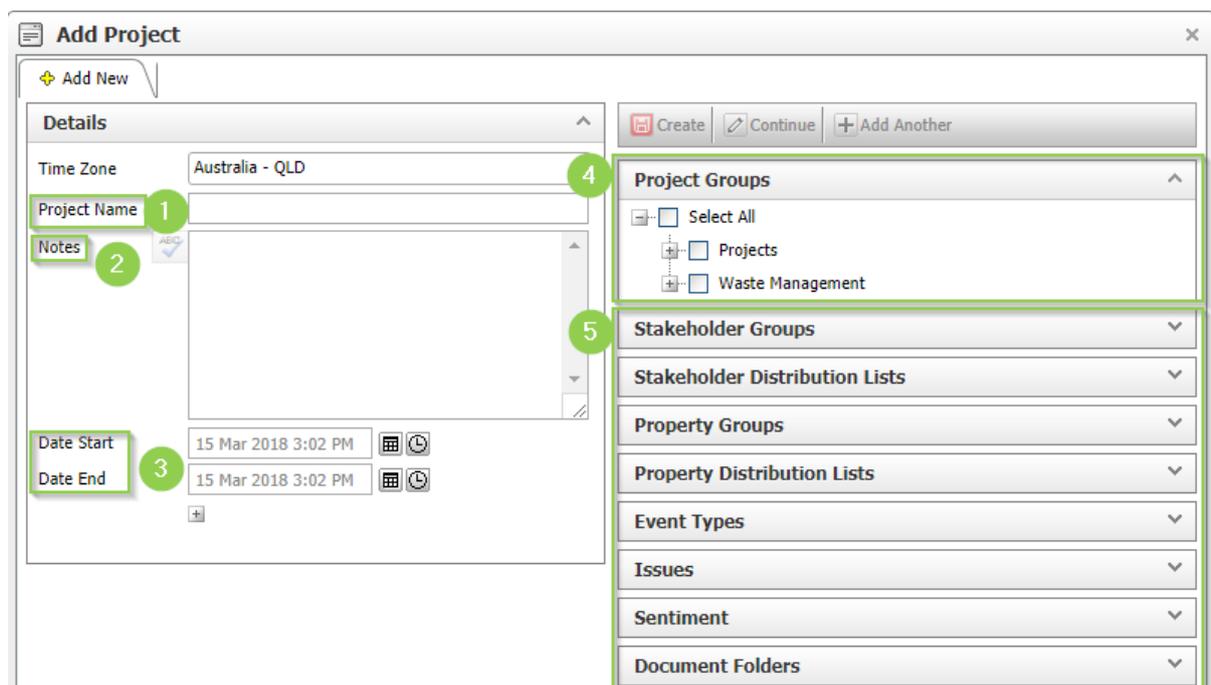
Look for, and click on, the "+" button on the Projects panel.



The screenshot shows the 'Manage Enterprise' interface. On the right side, there is a 'Projects (9)' panel with a table of projects. A green box highlights a '+' button in the top right corner of this panel. Below the table, there are navigation controls and a 'Page size: 5' dropdown. On the left side, there is a 'Details' section with various fields like 'ProjectLimit', 'Enterprise Name', and 'Action Reminders'. Below that, there are several expandable sections: 'Stakeholder Groups (74)', 'Stakeholder Distribution Lists (12)', 'Property Groups (13)', 'Property Distribution Lists (3)', 'Event Types (33)', 'Issues (125)', 'Sentiment (5)', 'Document Folders (15)', and 'Project Groups (11)'.

Name	Date Start	Date End
Adelaide CBD	16 Dec 2017 3:44 PM	16 Dec 2018 3:44 PM
Darwin CBD	18 Dec 2017 10:52 AM	18 Dec 2018 10:52 AM
Kensington/Kingsford	04 Feb 2016 9:14 PM	04 Feb 2017 9:14 PM
Landmark LNG	24 Aug 2009 10:00 AM	24 Aug 2011 10:00 AM
Melbourne City Test	12 Nov 2014 1:02 PM	12 Nov 2015 1:02 PM

This will open a pop-up window where you can add a new Project.



The screenshot shows the 'Add Project' pop-up window. It has a 'Details' section on the left and a 'Project Groups' section on the right. The 'Details' section includes:
 

- Time Zone:** Australia - QLD
- Project Name:** (1) - A text input field with a green circle '1' next to it.
- Notes:** (2) - A text area with a green circle '2' next to it.
- Date Start:** 15 Mar 2018 3:02 PM
- Date End:** 15 Mar 2018 3:02 PM (3) - A green circle '3' is next to the date field.

 The 'Project Groups' section on the right has a green box around it and contains:
 

- Project Groups:** A section with a 'Select All' button and two sub-items: 'Projects' and 'Waste Management'.
- Stakeholder Groups:** (4) - A dropdown menu with a green circle '4' next to it.
- Stakeholder Distribution Lists:** A dropdown menu.
- Property Groups:** A dropdown menu.
- Property Distribution Lists:** A dropdown menu.
- Event Types:** A dropdown menu.
- Issues:** A dropdown menu.
- Sentiment:** A dropdown menu.
- Document Folders:** A dropdown menu.

 At the top of the window, there are buttons for 'Create', 'Continue', and '+ Add Another'.

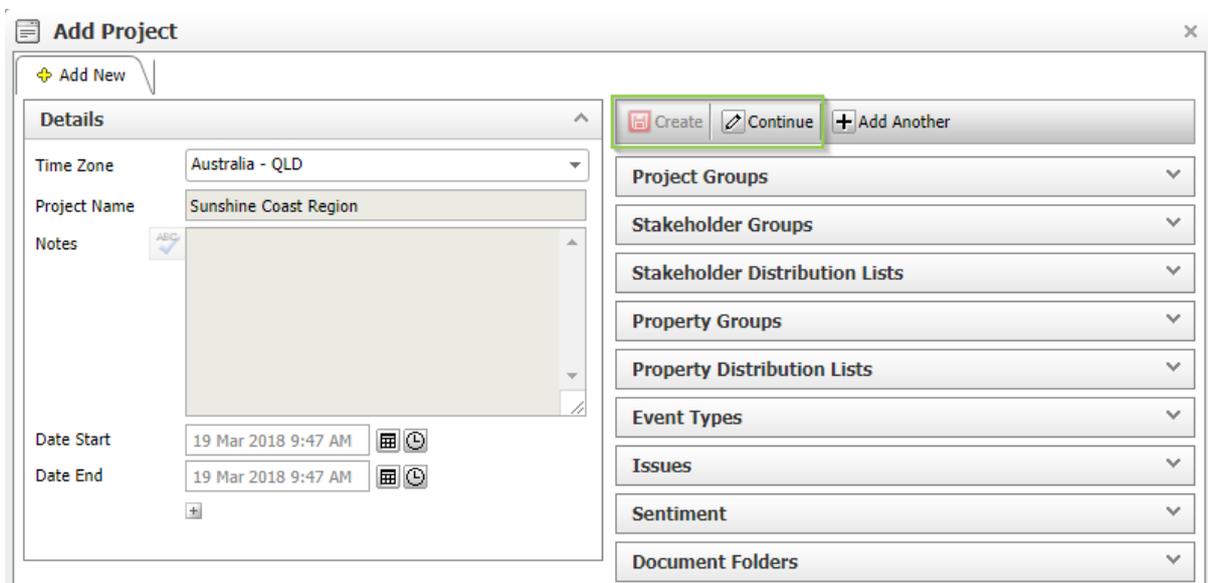
1. **Project Name:** This is where you designate the name of your Project

2. **Notes:** This is where you can add a brief explanation or the new Project's purpose, or any important information relating to the Project at large.
3. **Date start/end:** This is where you can specify the duration of your Project. Please note this doesn't impact your billing schedule at all.
4. **Project Groups:** This is where you can put your new Project under any Project Groups it may need to go in.
5. **Groups/Types:** This is where you can select any existing Group and/or Type in the system and allocate it to the Project. Please note that leaving any of these items unselected may significantly impact user's ability to input data into the system.



**Hint:** You can find a break down of Groups and Types in the 'Components of a Project' section.

Once you've populated the details of the Project, making sure all relevant Groups/Types are selected, click 'Create' and 'Continue'.



This will open the new Project in the Workspace where you can edit any details of the Project, as well as assign Team Members and any other entities to the Project.

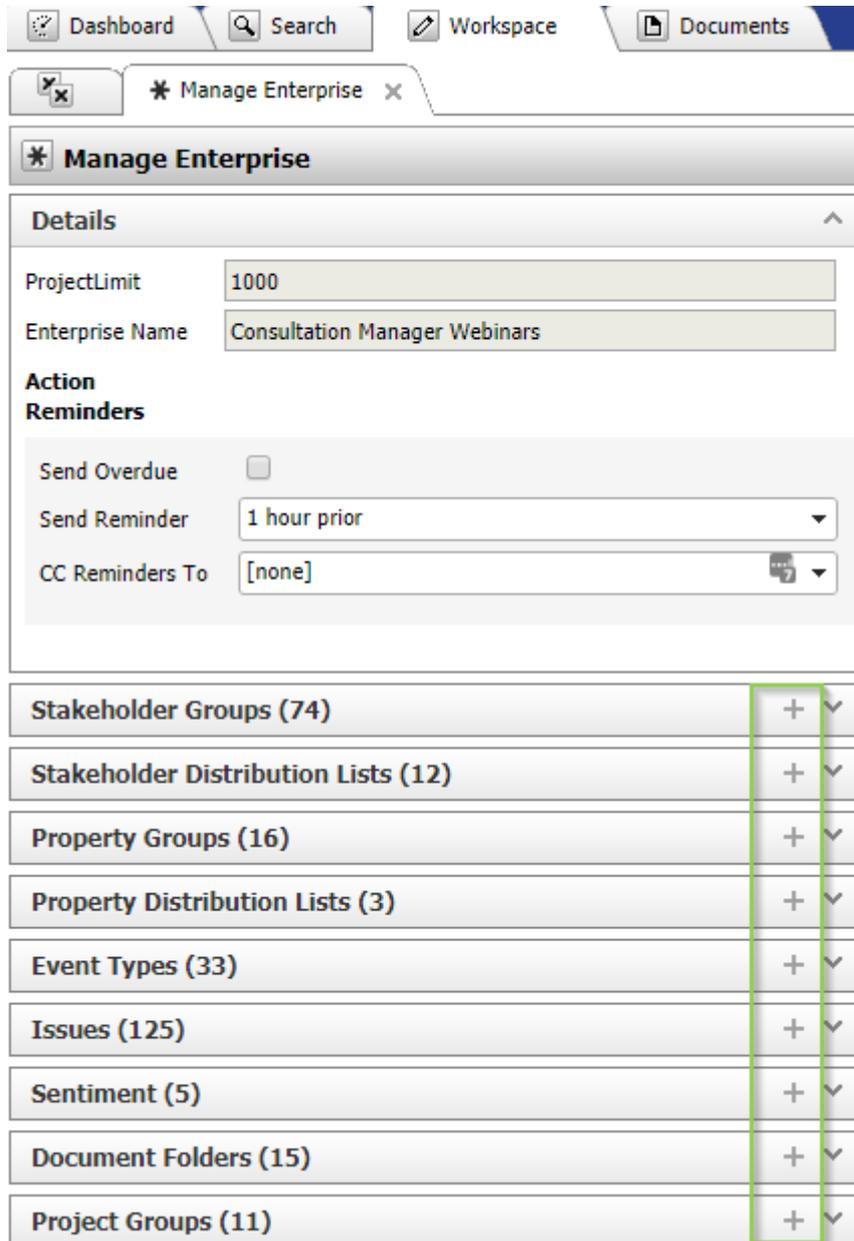


**Hint:** You can find information on how to add Team Members to your Project in the 'Team Members' section.

## Adding new Groups/Types

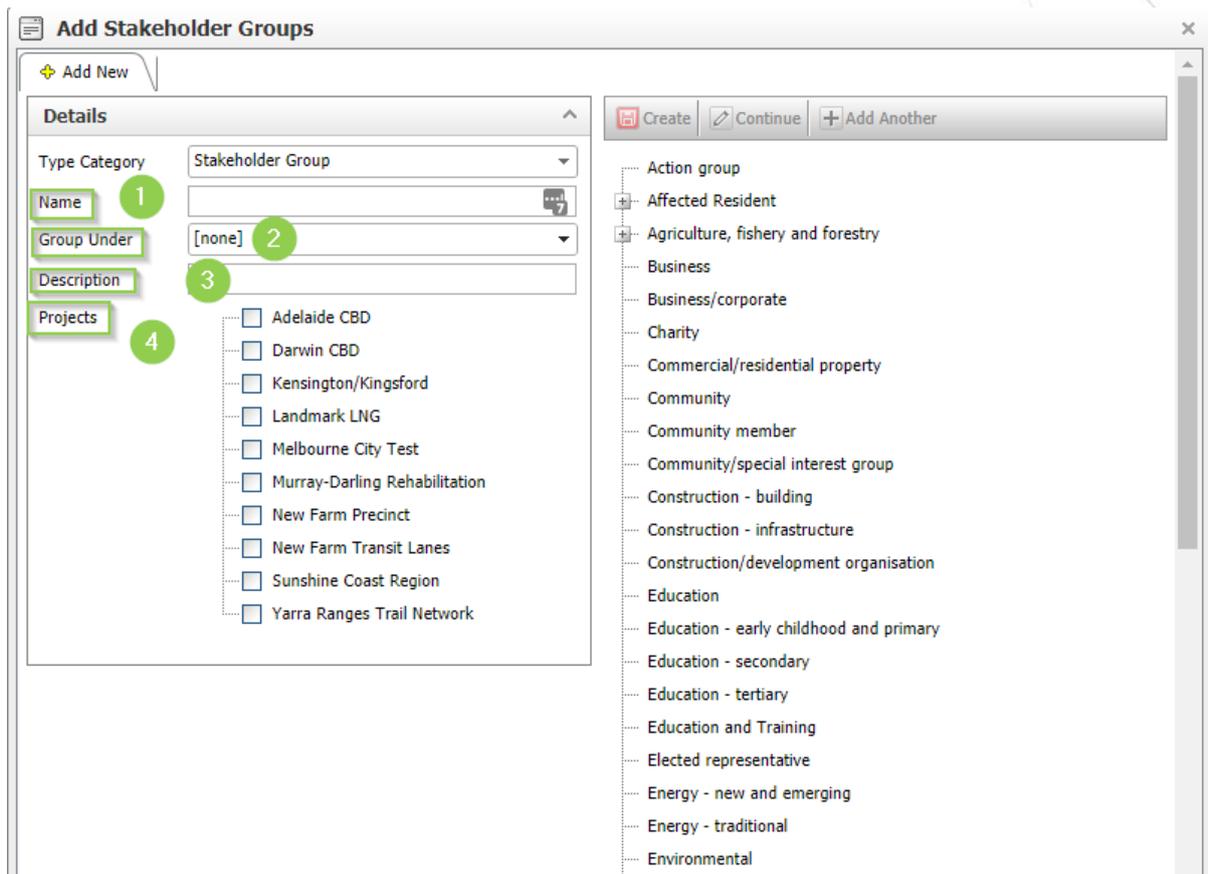
The Groups and Types in the system are highly customisable and can be added or removed at any time.

To create a new Group or Type in the system, go to the 'Manage Enterprise' screen, and click on the "+" button on the panel of the Group or Type you wish to add.



Category	Count	Action
Stakeholder Groups	74	+ ▼
Stakeholder Distribution Lists	12	+ ▼
Property Groups	16	+ ▼
Property Distribution Lists	3	+ ▼
Event Types	33	+ ▼
Issues	125	+ ▼
Sentiment	5	+ ▼
Document Folders	15	+ ▼
Project Groups	11	+ ▼

This will create a pop-up window where you can add the details of the new Group or Type you wish to add.



1. **Name:** This is where you allocate the name of the new Group or Type.
2. **Group Under:** This is where you can specify if this new Group or Type needs to be grouped under another category. For example, from the above screenshot, Affected Resident is a Stakeholder Group 'Parent' which can have other Stakeholder Groups grouped under them. You can leave this blank if you do not wish to add your new group or type under a group.
3. **Description:** This is where you can write a brief description of what the new Group or Type is meant to capture.
4. **Projects:** This is where you can select which Projects to add this new Group or Type to. If you leave this blank, no users in any Project will be able to select this new Group or Type.

 *Hint: Event Type is the only Group or Type which cannot be Grouped.*

After you've included all the details, click 'Create' and 'Continue' which will open the new Group or Type in the Workspace where you can edit or add details directly to it.

 *Hint: If you have some extra Groups or Types in your system, the process to create new ones will be the same as this.*

## Team Members

Any users of Consultation Manager are considered team members, often they are organisational employees and project contractors. However, this is not limited and any person requiring system access can be created as a team member.

### Roles

Consultation Manager has six (6) different access levels, suitable to configure team member roles for different authority and responsibility within your organization. The table below provides an overview for each.

Role	Team Member	Data Viewer	Data Entry	Data Editor	Team Leader	Enterprise Administrator
View Data, Reports and Documents	•	✓	✓	✓	✓	✓
Edit and add data	•	•	✓	✓	✓	✓
Delete data	•	•	•	✓	✓	✓
Manage existing team and Framework	•	•	•	•	✓	✓
Create Framework	•	•	•	•	•	✓
Create or change Projects	•	•	•	•	•	✓
Make Entities private	•	•	•	•	•	✓
Add new Team Members	•	•	•	•	•	✓

### Team Member

Team Members are those who have participated in an event or action but require no access to data i.e. they cannot login to the program. In addition, this role is useful for revoking system access to a previous or past user.

### Data Viewer

Data Viewers have access to view data, lists and reports but are not able to enter new or modify existing data.

### Data Entry

Users with Data Entry assignment can enter and only edit data that they have created.

## Data Editor

Data Editors can view and generate reports, as well as edit and delete data but are not able to create or change lists and categories within the project.

## Team Leader

Team Leaders can assign, remove and modify access levels on existing system team members for their project areas, however they cannot create new ones. They are also able to access and select lists for use in their project.

## Enterprise Administrator

Enterprise Administrators hold full system administrative rights and can create, modify, remove and manage all framework.

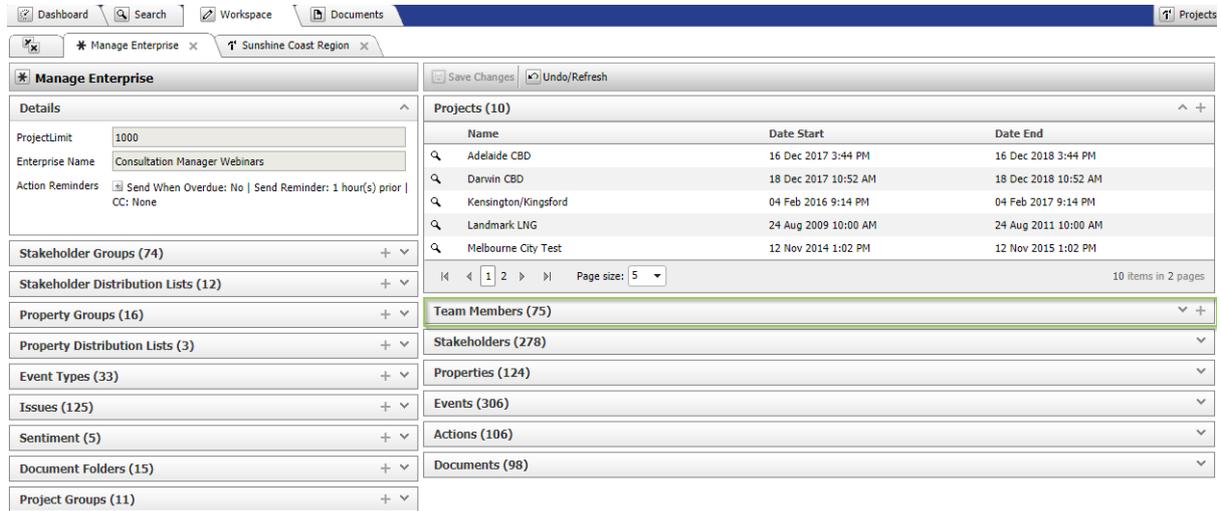
This includes but is not limited to project creation, segregation and framework allocation of stakeholder groups, stakeholder distribution lists, property groups, property distribution lists, event types, issues and document folders.

In addition, Enterprise Administrators are responsible for creating new team member and issuing credentials.

## Creating a new Team Member

You can create a new Team Member from the 'Manage Enterprise' screen, 'Manage Project' screen, or from your dashboard when you first log in.

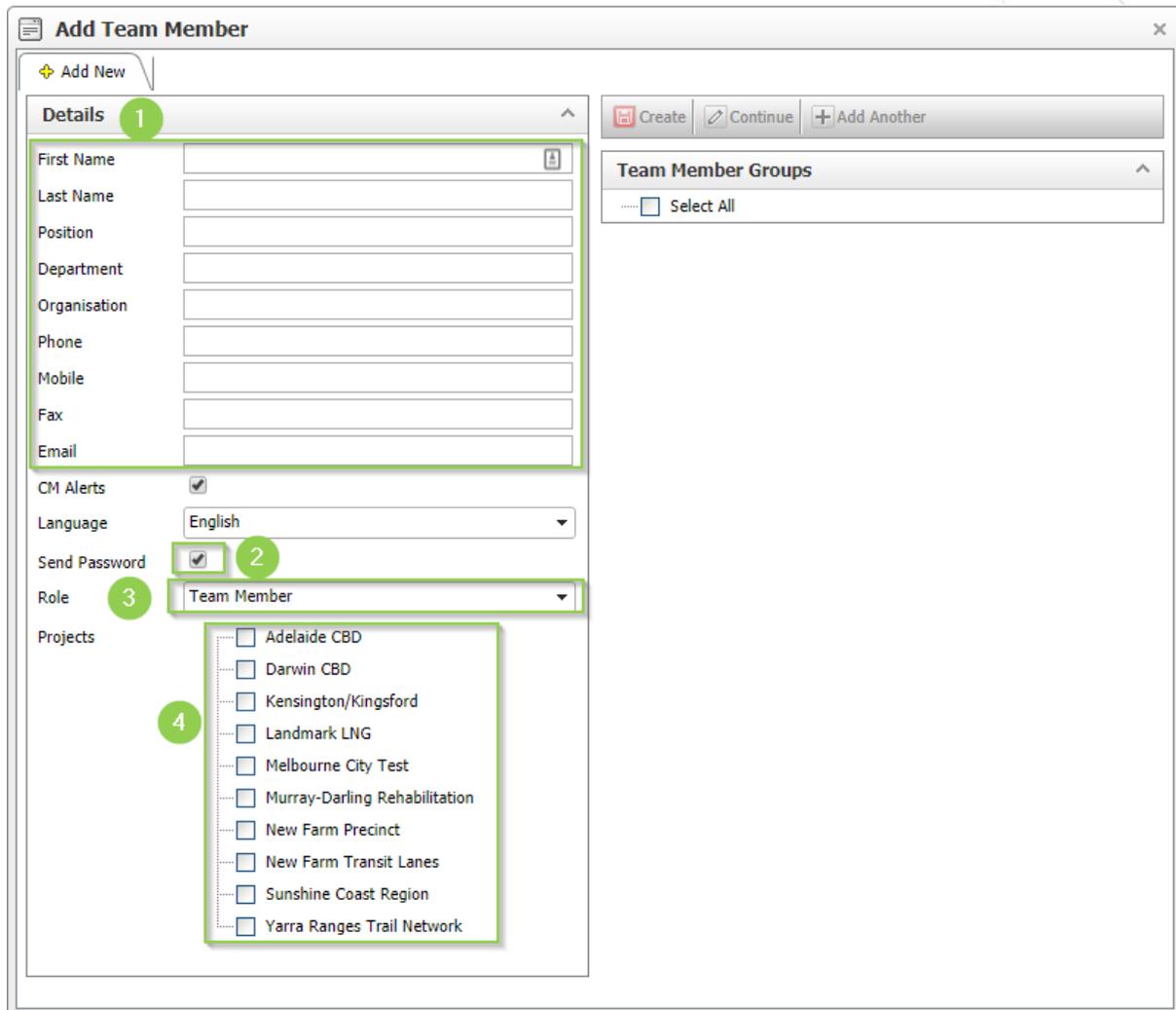
On the 'Manage Enterprise' or 'Manage Project' screen, look for and click on the "+" button on the Team Member panel.



The screenshot shows the 'Manage Enterprise' interface. On the left, there is a sidebar with several panels: Details, Stakeholder Groups (74), Stakeholder Distribution Lists (12), Property Groups (16), Property Distribution Lists (3), Event Types (33), Issues (125), Sentiment (5), Document Folders (15), and Project Groups (11). The main content area is titled 'Manage Enterprise' and includes a 'Save Changes' button and an 'Undo/Refresh' button. Below this, there is a table of 'Projects (10)' with columns for Name, Date Start, and Date End. The table lists projects such as Adelaide CBD, Darwin CBD, Kensington/Kingsford, Landmark LNG, and Melbourne City Test. Below the table, there is a 'Team Members (75)' panel with a '+' button, and other panels for Stakeholders (278), Properties (124), Events (306), Actions (106), and Documents (98).

Name	Date Start	Date End
Adelaide CBD	16 Dec 2017 3:44 PM	16 Dec 2018 3:44 PM
Darwin CBD	18 Dec 2017 10:52 AM	18 Dec 2018 10:52 AM
Kensington/Kingsford	04 Feb 2016 9:14 PM	04 Feb 2017 9:14 PM
Landmark LNG	24 Aug 2009 10:00 AM	24 Aug 2011 10:00 AM
Melbourne City Test	12 Nov 2014 1:02 PM	12 Nov 2015 1:02 PM

This will create a pop-up menu where you can add the details of your new Team Member.



**Add Team Member**

✦ Add New

**Details** 1

First Name

Last Name

Position

Department

Organisation

Phone

Mobile

Fax

Email

CM Alerts

Language

Send Password  2

Role 3

Projects 4

- Adelaide CBD
- Darwin CBD
- Kensington/Kingsford
- Landmark LNG
- Melbourne City Test
- Murray-Darling Rehabilitation
- New Farm Precinct
- New Farm Transit Lanes
- Sunshine Coast Region
- Yarra Ranges Trail Network

Create | Continue | Add Another

**Team Member Groups**

Select All

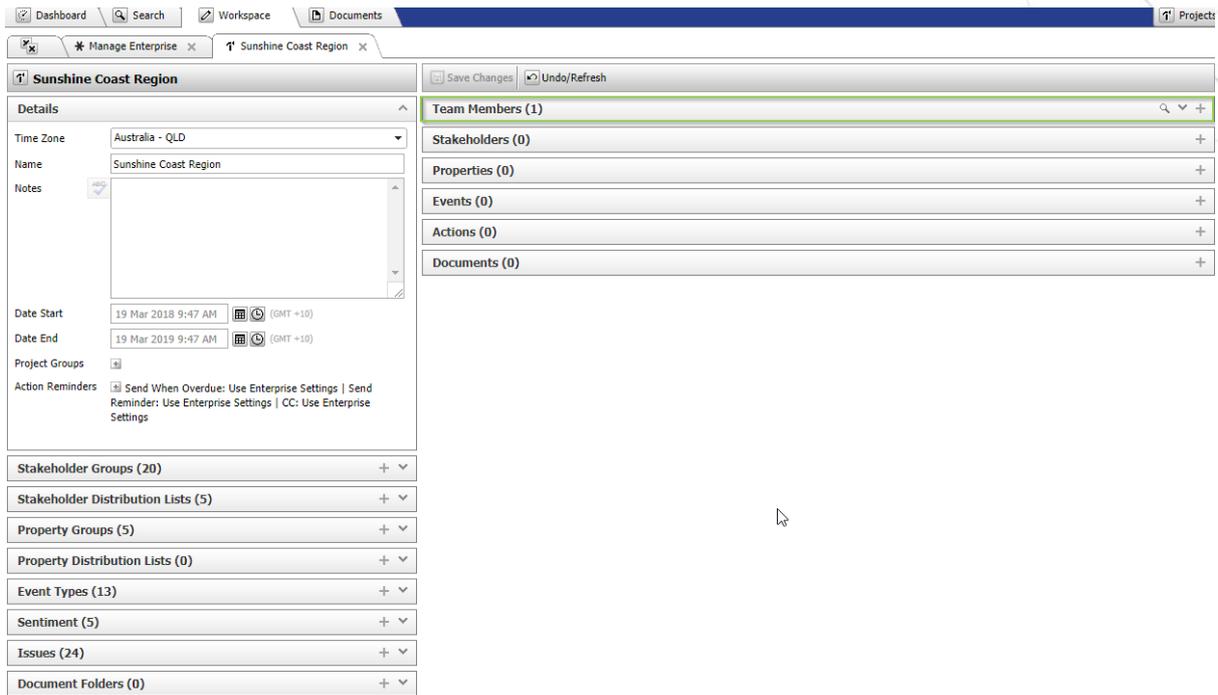
1. **Details:** This is where you can input all the details of the new Team Member. Please note that they need to have a valid email they have access to. This email is where their credentials will be sent to.
2. **Send Password:** Make sure this box is always selected when creating a new Team Member, otherwise their credentials will not automatically be sent to them.
3. **Role:** This is where you can allocate what access role they are to have. If you leave this as 'Team Member' they will not be able to have access to the system.
4. **Projects:** This is where you select which Projects they are to have access to. Please note that they will have the same role across all Projects as allocated in the Role.

Once all details have been filled out, click 'Create' and 'Continue'. This will open this user's profile in the Workspace.

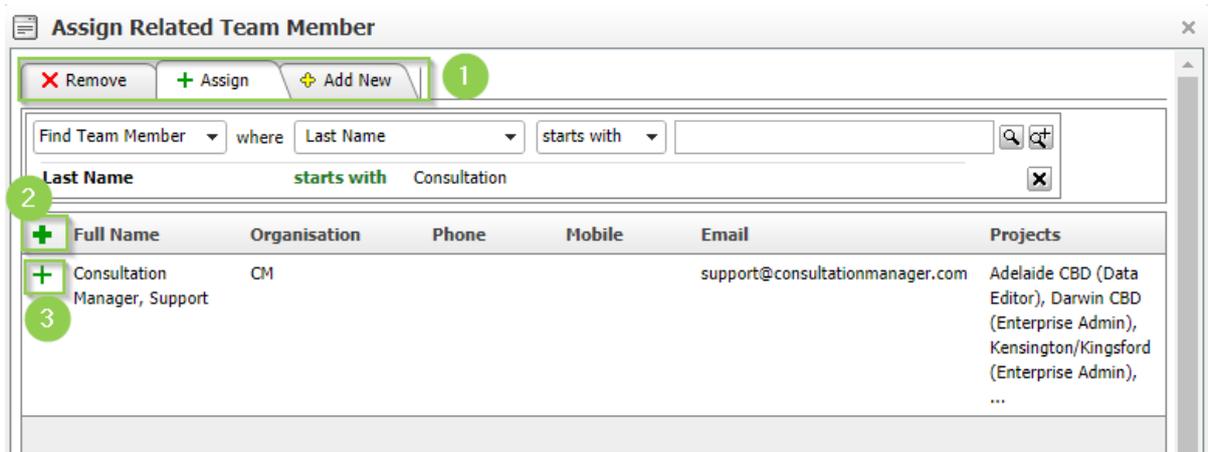
### Assigning existing Team Members

After creating a new Project, you can add existing Team Members that are in the system into your Project.

Look for and click on the "+" button on the Team Members tab in the 'Manage Project' screen.



This will create a pop-up window where you can Remove, Assign, or Create a Team Member.

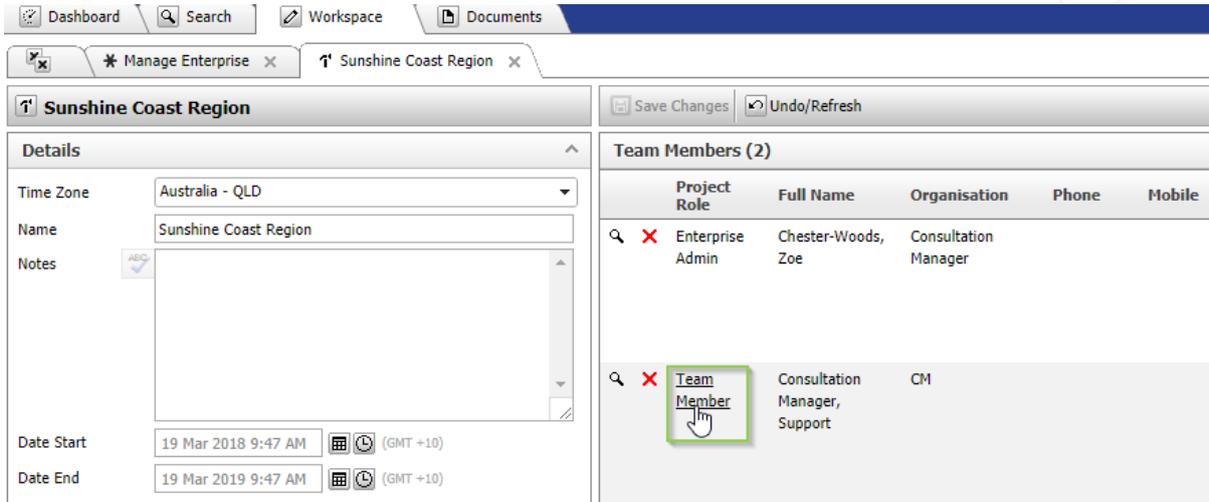


Full Name	Organisation	Phone	Mobile	Email	Projects
Consultation Manager, Support	CM			support@consultationmanager.com	Adelaide CBD (Data Editor), Darwin CBD (Enterprise Admin), Kensington/Kingsford (Enterprise Admin), ...

1. **Remove, Assign, Add New tabs:** This pop-up will automatically open in the Assign tab, but you can navigate between them easily. Remove is to remove any Team Members currently on the Project, Assign is to include any existing Team Members on the Project, Add New is to create an entirely new Team Member.
2. **Bulk Assign:** You can bulk assign Team Members to the Project by clicking this large green + button. This will assign all Team Members on the search results to the Project.
3. **Single Assign:** Clicking the + button next to a specific Team Member will add only that Team Member to that Project.

Once you've added your Team Members to the Project, their names will disappear from the list, meaning they've been added to the Project and you can close out of that pop-up menu.

After you've added these users to the Project, you need to assign their access roles. They will automatically be added with the 'Team Member' role.



The screenshot shows the 'Sunshine Coast Region' project details on the left and a list of team members on the right. The team members list has the following data:

Project Role	Full Name	Organisation	Phone	Mobile
Enterprise Admin	Chester-Woods, Zoe	Consultation Manager		
Team Member	Consultation Manager, Support	CM		

Click on 'Team Member' next to their name, and it will create a drop-down menu where you can choose their role for the Project.

 **Hint:** Team Members can have different access roles for different Projects. If they have all open at the same time, their access role will revert to their lowest role for all Projects for security reasons.

## What to do when a Team Member leaves

If you have a staff member that has access to the system, but leaves the company, you can manage this in a couple of ways.

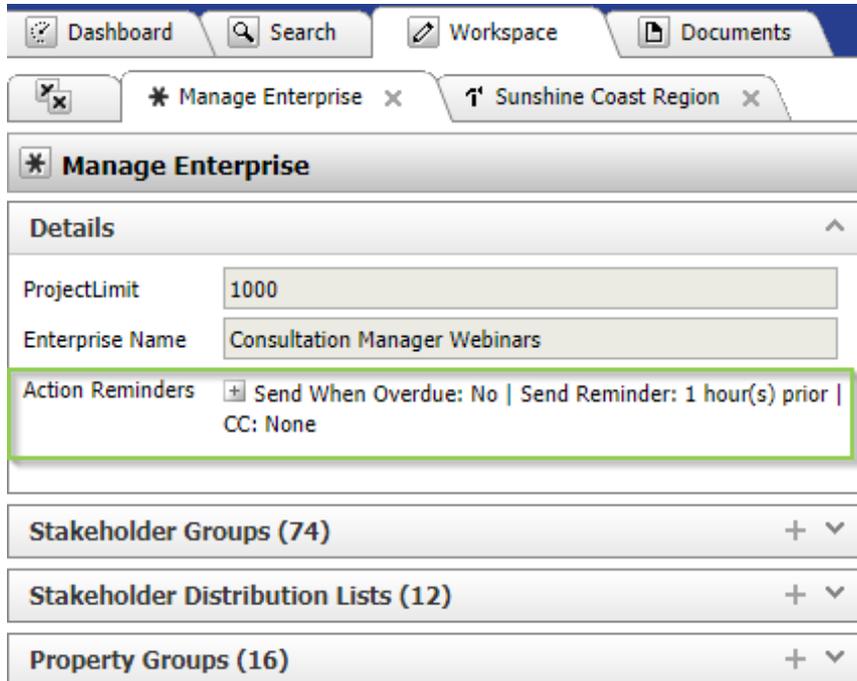
To retain all data integrity, we highly recommend reducing their access to all Projects to 'Team Member'. This ensures all their historical interactions are maintained, but they no longer can log in and access the system.

Whilst this is not a method we recommend, you can also delete the user profile. To do this however, all relationships between the user and any Entities need to be re-allocated or removed, so their Profile should look blank.

## Automated Action Reminders

Automated Action reminders can be set up system wide, or on a per Project basis. This functions to alert a particular Team Member if Actions are not being resolved.

You can set them up for the whole Enterprise in the 'Manage Enterprise' Screen.



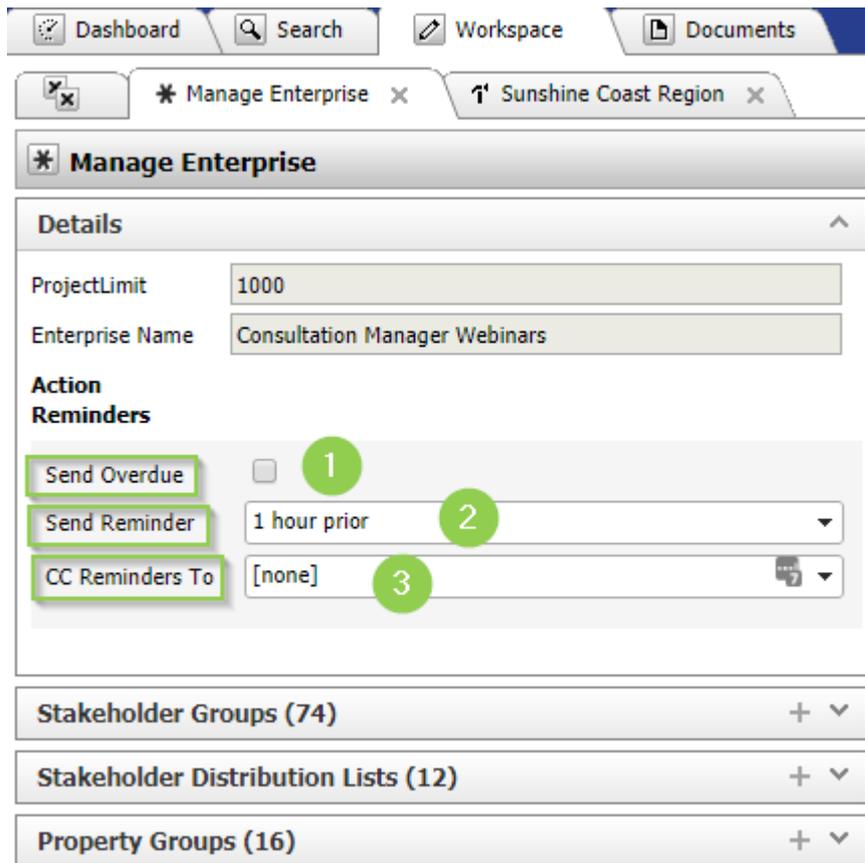
The screenshot displays the 'Manage Enterprise' configuration screen. At the top, there is a navigation bar with icons for Dashboard, Search, Workspace, and Documents. Below this, there are two tabs: 'Manage Enterprise' (active) and 'Sunshine Coast Region'. The main content area is titled 'Manage Enterprise' and contains a 'Details' section with the following settings:

- ProjectLimit: 1000
- Enterprise Name: Consultation Manager Webinars
- Action Reminders:  Send When Overdue: No | Send Reminder: 1 hour(s) prior | CC: None

Below the details section, there are three expandable sections, each with a '+' icon and a dropdown arrow:

- Stakeholder Groups (74)
- Stakeholder Distribution Lists (12)
- Property Groups (16)

Click the "+" to expand the options available.



The screenshot shows the 'Manage Enterprise' settings for the 'Sunshine Coast Region'. The interface includes a navigation bar with 'Dashboard', 'Search', 'Workspace', and 'Documents'. Below the navigation bar, there are tabs for 'Manage Enterprise' and 'Sunshine Coast Region'. The main content area is titled 'Manage Enterprise' and contains a 'Details' section with the following fields:

- ProjectLimit:** 1000
- Enterprise Name:** Consultation Manager Webinars
- Action Reminders:**
  - Send Overdue:** A checkbox labeled '1' is currently unchecked.
  - Send Reminder:** A dropdown menu labeled '2' is set to '1 hour prior'.
  - CC Reminders To:** A dropdown menu labeled '3' is set to '[none]'.

Below the 'Details' section, there are three expandable sections: 'Stakeholder Groups (74)', 'Stakeholder Distribution Lists (12)', and 'Property Groups (16)', each with a plus and minus icon.

1. **Send Overdue:** This is where you can select if you wish to send overdue notices. If this box is unchecked, no one will be informed if Actions are overdue.
2. **Send Reminder:** This is where you can allocate when you'd like reminders to be sent to users who have Action deadlines coming up. These range in timeframes from 1 hour prior to deadline, to 7 days prior.
3. **CC reminders To:** This is where you can select an additional Team Member in the system who gets notified of all automated reminders. This typically is someone in a managerial role who needs to be notified if Actions aren't being resolved.

Setting this function up per Project has the same layout and can be found in the specific Project's profile.

Dashboard Search Workspace Documents

Manage Enterprise x Sunshine Coast Region x

### Sunshine Coast Region

**Details**

Time Zone: Australia - QLD

Name: Sunshine Coast Region

Notes:

Date Start: 19 Mar 2018 9:47 AM (GMT +10)

Date End: 19 Mar 2019 9:47 AM (GMT +10)

Project Groups: +

Action Reminders: + Send When Overdue: Use Enterprise Settings | Send Reminder: Use Enterprise Settings | CC: Use Enterprise Settings

Stakeholder Groups (20) + v

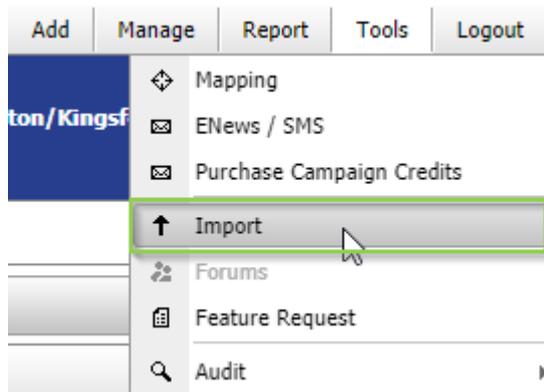
 Hint: These settings will be set at 'Use Enterprise Settings' for new Projects as default.

## Importing

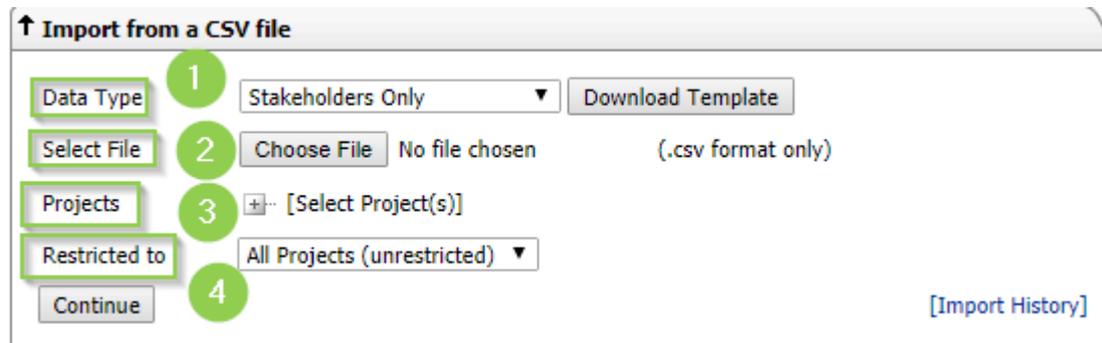
Enterprise Administrators are the only users who can bulk add data into the system quickly and easily using the import tool.

You can do this by using specific import templates which can be downloaded at any time from within the system.

Go to the 'Tools' menu on the Command Bar, and down to 'Import'.



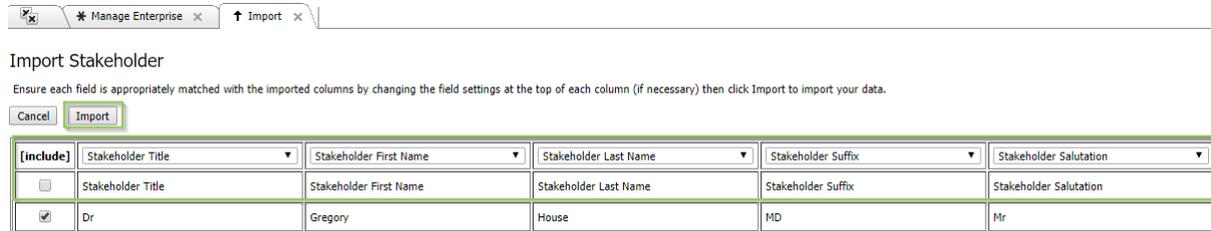
This will open up the Importing screen in the Workspace. From this screen you can perform imports, or simply download the relevant Template to begin filling it out with your data.



1. **Data Type:** This is where you can choose what type of data to import. This is also where you can choose which Template to download, then click 'Download Template'. There are 4 Templates you can choose from: Stakeholders, Properties, Stakeholders and Properties, and Events.
2. **Select File:** When you've input the data into your template, this is where you can choose which file to upload.
3. **Projects:** This is where you can select which Projects you'd like this data to be allocated to. Please note Events must be allocated to a Project.
4. **Restricted To:** This is where you can choose to have your data you're uploading available and viewable to all Projects and users in the system, or if you want to lock it down to one or a couple of Projects in particular. Please note the default for this is set to unrestricted.

Once you've filled in the relevant template with all your data and selected your preferences, click 'Continue' to begin the importing process.

 **Hint:** Make sure the 'Data Type' section matches the template you're importing.



**Import Stakeholder**  
 Ensure each field is appropriately matched with the imported columns by changing the field settings at the top of each column (if necessary) then click Import to import your data.

Cancel Import

[include]	Stakeholder Title	Stakeholder First Name	Stakeholder Last Name	Stakeholder Suffix	Stakeholder Salutation
<input type="checkbox"/>	Stakeholder Title	Stakeholder First Name	Stakeholder Last Name	Stakeholder Suffix	Stakeholder Salutation
<input checked="" type="checkbox"/>	Dr	Gregory	House	MD	Mr

This will take you to the importing screen where you can see how your data will be imported before implementing.

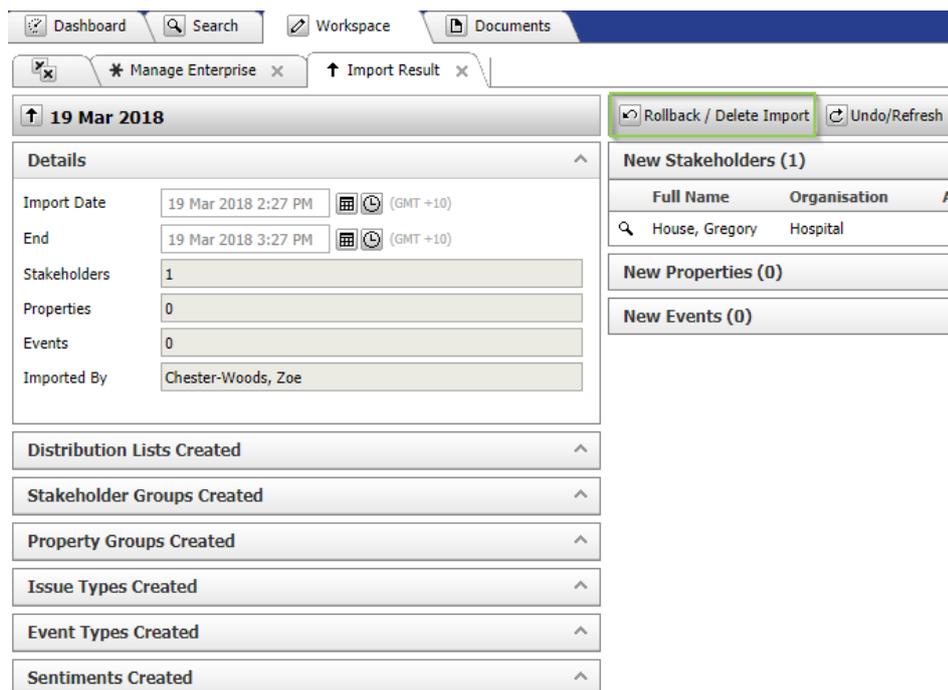
Make sure the top two rows match exactly, as the top one is what the system is expecting, and indicate the fields where that column will go, and the second is the title of the column in your spreadsheet.

Once you're satisfied it is how you'd like it, click 'Import' to begin the process.

Depending on how much data you have to import, it may take a few minutes to complete.

The system will take you to the workspace. This page will show you exactly what was imported, how many entities it's created, who conducted the import, as well as if it's created any new Groups or Type. If you're unhappy with the importing result, you can always roll the import back from that screen.

To roll back an import, simply click 'Rollback/Delete Import'.



Dashboard Search Workspace Documents

Manage Enterprise Import Result

19 Mar 2018 Rollback / Delete Import Undo/Refresh

**Details**

Import Date: 19 Mar 2018 2:27 PM (GMT +10)

End: 19 Mar 2018 3:27 PM (GMT +10)

Stakeholders: 1

Properties: 0

Events: 0

Imported By: Chester-Woods, Zoe

**New Stakeholders (1)**

Full Name	Organisation	Ac
House, Gregory	Hospital	

**New Properties (0)**

**New Events (0)**

Distribution Lists Created

Stakeholder Groups Created

Property Groups Created

Issue Types Created

Event Types Created

Sentiments Created

### Important Importing notes:

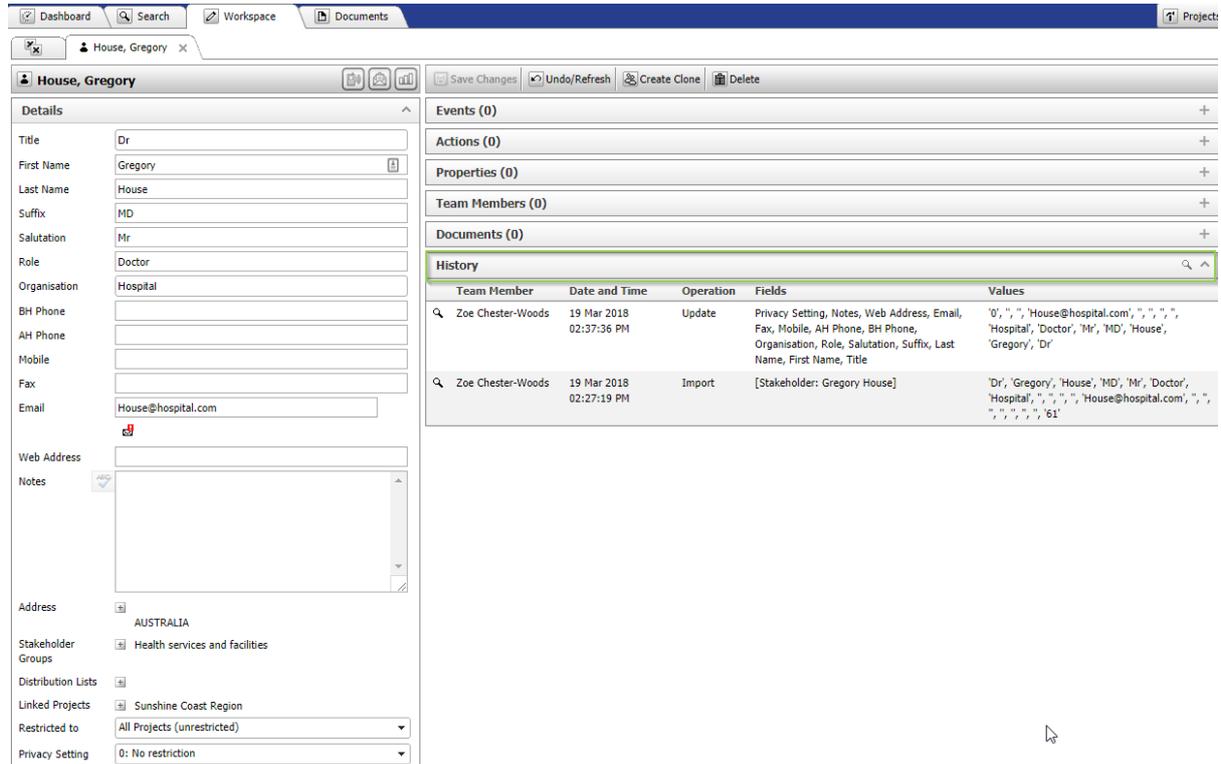
- Please **do not** change the format of the template in any way, this will cause the import to fail.
- If you have over 500 rows of data, we recommend conducting multiple imports.
- Event imports can be linked to Stakeholders via the Stakeholder email address field. However, they must be identical to their existing record in Consultation Manager. Any variations, including capital letter differences or spaces will affect this function.
- You do not have to populate every cell in the document, but **do not** delete columns from the template.
- Please **do not** add more than one phone, fax, or email in a cell. Adding more than one may cause the import to malfunction.
- You cannot add more than one Stakeholder Group or Distribution List to a Stakeholder.
- You cannot add more than one Event Type, or Issue to an Event.
- Event Types or Issues must appear exactly the same on the template as they are in the system. Any differences, such as capital letters or spaces will create a new Type with the spelling difference. Eg. Dust appears as an Issue in the system, but it was put into the template as dust. A new Issue named 'dust' will appear in the system with the imported Events linked to it.

## User history

As an Enterprise Administrator, you also have some transparency over what general users are doing within the system. You can do this on a specific entity, or over the entire system.

### Entity History

Enterprise Administrator are the only users who can see exactly what has happened to each entity by looking at it's profile's history.



The screenshot shows the 'House, Gregory' entity profile with the 'History' tab expanded. The history table contains the following data:

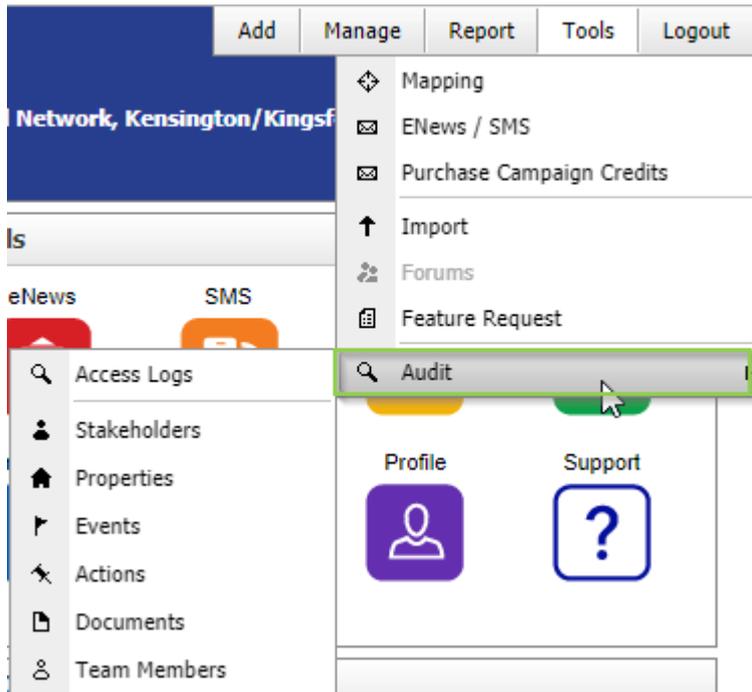
Team Member	Date and Time	Operation	Fields	Values
Zoe Chester-Woods	19 Mar 2018 02:37:36 PM	Update	Privacy Setting, Notes, Web Address, Email, Fax, Mobile, AH Phone, BH Phone, Organisation, Role, Salutation, Suffix, Last Name, First Name, Title	'0', '', 'House@hospital.com', '', '', 'Hospital', 'Doctor', 'Mr', 'MD', 'House', 'Gregory', 'Dr'
Zoe Chester-Woods	19 Mar 2018 02:27:19 PM	Import	[Stakeholder: Gregory House]	'Dr', 'Gregory', 'House', 'MD', 'Mr', 'Doctor', 'Hospital', '', '', 'House@hospital.com', '', '', '', '51'

By expanding the history tab on an Entity, you can see what Team Member edited it in what way, and when.

### Audit history

Enterprise Administrators are also able to access full audit logs outlining what has happened on Entities within the entire system.

You can access these by going to the 'Tools' menu in the 'Command bar' and down to 'Audit'.



Selecting any option from this menu will take you to a search function where you can narrow down the audit details you want to find on that particular entity.

For example, if you wanted to see what functions a particular set of Team Members have been performing over the past month you can run a report narrowing down those Team Members to a specific timeframe to see what Entities they've updated or added into the system.

## Support

Remember we are always here and happy to assist. Our dedicated Support team can be contacted during business hours, Monday – Friday, on a variety of channels.



Email: [support@consultationmanager.com](mailto:support@consultationmanager.com)



Live Chat: <http://consultationmanager.com/>



Phone: 1300 850 058



Self Help: <https://support.consultationmanager.com.au/support/solutions>