



General User Guide

Training Manual

December 2018



Consultation Manager

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Welcome to Consultation Manager!

General Overview

Consultation Manager (CM) is regarded as the industry standard software for capturing and reporting on stakeholder and community engagement data. With clients spanning both the public and private sectors, CM is used for various functions including Key Stakeholder Engagement, Community Engagement, Government Relations, Media Relations, Investor Relations, Public Relations, Change Management and Issue Management.

In a nutshell CM enables you to:

1. Record all the interactions between your team and your stakeholders, no matter how those interactions take place.
2. Flag any issues raised in these interactions.
3. Ensure that any issues raised are followed up and alleviated to your satisfaction.

CM ensures nothing falls through the cracks, and so prevents small issues from growing into big issues.

Each system has tailored framework to suit your organisations needs and reporting outputs. This is configured by system administrators and can be adapted as project needs change.

Support

CM 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



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



Phone: 1300 850 058



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

FAQ's

How many users can I have?

You can have an unlimited number of users. We do not charge on the number of users in your system and it has been designed so as many users as you need can access CM simultaneously.

How many projects can I have?

You can have an unlimited number of projects within your CM Enterprise system.

Is document storage free?

In an Enterprise system, you can store as many documents as you want for free.

How do you charge?

We charge on the number of records in your system. This means that you only pay for your use of the system. Total records are the count of all main entities in the system: Stakeholders, Properties, Team Members, Events, Actions and Documents.

How can my team access CM?

CM is a cloud-based platform that is accessible across multiple web browsers including Internet Explorer, Apple Safari, Google Chrome and Mozilla Firefox. No software needs to be installed at your end to access CM.

Are you ISO accredited?

CM has 2 ISO accreditations. ISO 2001:2013 (Information Security) and ISO 9001:2015 (Quality Management). ISO 27001:2013 is an international security standard that specifies security management best practices. To become certified to these standards, and to continue to keep our certifications, we must:

- Systematically evaluate our security risks
- Demonstrate how our information security controls address these risks
- Continuously review our practices to ensure that our information security controls continue to address these risks
- Have our information security practices audited annually and verified by an independent auditor

Data Sovereignty

All data is stored and processed in Australia in highly secure, Tier 3 data centres.

How does CM consolidate existing distributed data sources?

We understand that existing stakeholder data may exist in various forms (sometimes captured inconsistently). During implementation, Account Managers work with the organisation to consolidate these data sources, provide relevant framework structure and import into CM. This will allow for immediate access to data through the Search function, workspace and reporting tabs.

How is information put into CM?

Information can be inputted by various means including manual data entry, webforms, csv imports or outlook and lotus notes plug-ins.



***Webforms:** Webforms deserve special attention as they are becoming very popular. A webform goes on your public website, your visitors can fill it out, and it feeds this information directly into CM. The benefit of this is twofold; it reduces the need for data entry at your end, and it promotes a more engaged group of stakeholders (as they have taken the time to put their own details in and so are more invested in your organisation).*

How do I import existing data?

CM allows the importing of data using a CSV template. Stakeholder, event and properties can all be imported. As this is a higher-level function it is restricted to those with an Enterprise Administrator role in CM and is consequently covered in our certification course for 'Enterprise Administrators'.

Microsoft Office Toolset

Once this toolset is installed, a Consultation Manager icon is added to Microsoft Word, Excel and Outlook. This allows you to upload emails, documents and spreadsheets directly into Consultation Manager without having to leave your desktop or even open Consultation Manager.

Lotus Notes Plug in

The plug in allows for the upload of emails directly into CM without having to leave your mail client. Create or update existing stakeholder records, upload email content and create follow up actions.

IOS and Android Apps for Mobile Devices

Access Consultation Manager data while in the field, view and send documents, access maps and street views of properties, and even use voice to text to enter data while on the move. Note that the Apple app is read and write, while the Android app is read-only.

eNews and SMS Communication

You can use CM to send customised eNews campaigns or direct emails to stakeholders and/or users simultaneously. Similarly, you can do the same with SMS messages.

What is MySite?

The MySite group of companies own and develop the software products Consultation Manager (CM) and Social Pinpoint

Social Pinpoint

MySite acquired Social Pinpoint, a software company that integrates seamlessly with CM but that is public facing. It enables the community to get involved and participate in local planning, design and infrastructure projects. It allows stakeholders to communicate and provide feedback by dragging and dropping an

issue pin on a specific location, offering users a unique opportunity to publicly post feedback, concerns and ideas in a moderated environment. Designed specifically for community engagement, Social Pinpoint's tools are proven to increase participation rates and improve the quality of public feedback.

Clients use Social Pinpoint to present complex information in a simple way with interactive mapping tools so everyone can understand. This enables our clients to inform and educate, to generate ideas, to gain and review feedback, and to collaborate.

This allows us to offer a complete, end-to-end engagement solution. Data inputted by stakeholders in Social Pinpoint seamlessly integrates with Consultation Manager.

Social Pinpoint is licensed separately to Consultation Manager, for more information regarding costings visit socialpinpoint.com. Social Pinpoint integration is free. Please contact us to have it enabled on your platform.

The Basics

Roles

CM has six (6) different access levels, suitable to configure team member roles for different authority and responsibility within your organisation. 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, revoking a previous or past user to a team member will remove system access.

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.

Key Terms and Definitions

Entity

Data within CM are segregated into six (6) major categories, including stakeholders, properties, events, issues, actions, documents and team members. These are most commonly referred to as **Entities**, which are all interrelated.

Stakeholder

A stakeholder is any interested party in the project, they can include people, businesses and organisations, community groups, etc.

Property

Properties are any physical location, often including dwellings and land, associated with an ownership relative to the stakeholder.

Event

Any interaction between stakeholders and team members are considered *events*, these are configured to suit your individual business requirements and frequently feature inbound and outbound calls, email correspondence, meetings, discussion forums, letterbox drops, marketing campaigns, etc.

Any areas of concerns or *issues* raised during an interaction can be assigned to an event. There is no limit to the number of issues that can be allocated.

Action

Actions are tasks or “to do” items assigned by a team member to themselves or another, usually when a follow-up or action is required. Actions remain active until they are resolved.

Document

Documents are electronic files (e.g. Word, Excel, PDF, etc.) or links to external document management systems that are best stored within the system for future reference.

Team Member

Any users of CM 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.

Record

Any new entity, such as a stakeholder, property, event, action, document or team member, is considered a record.

Project

CM uses a project style structure to effectively establish boundaries and data segregation. Projects can be further clustered into project groups so that you can report on a group of projects at once.

Framework

The overarching system configuration is referred to as framework. These are specific groupings, types and categories around which data is captured, such as Stakeholder Groups, Issues and Event Types.

Framework is unique to every organisation’s requirement and reporting outputs. In addition, it is selected to specifically suit the needs of individual project areas.

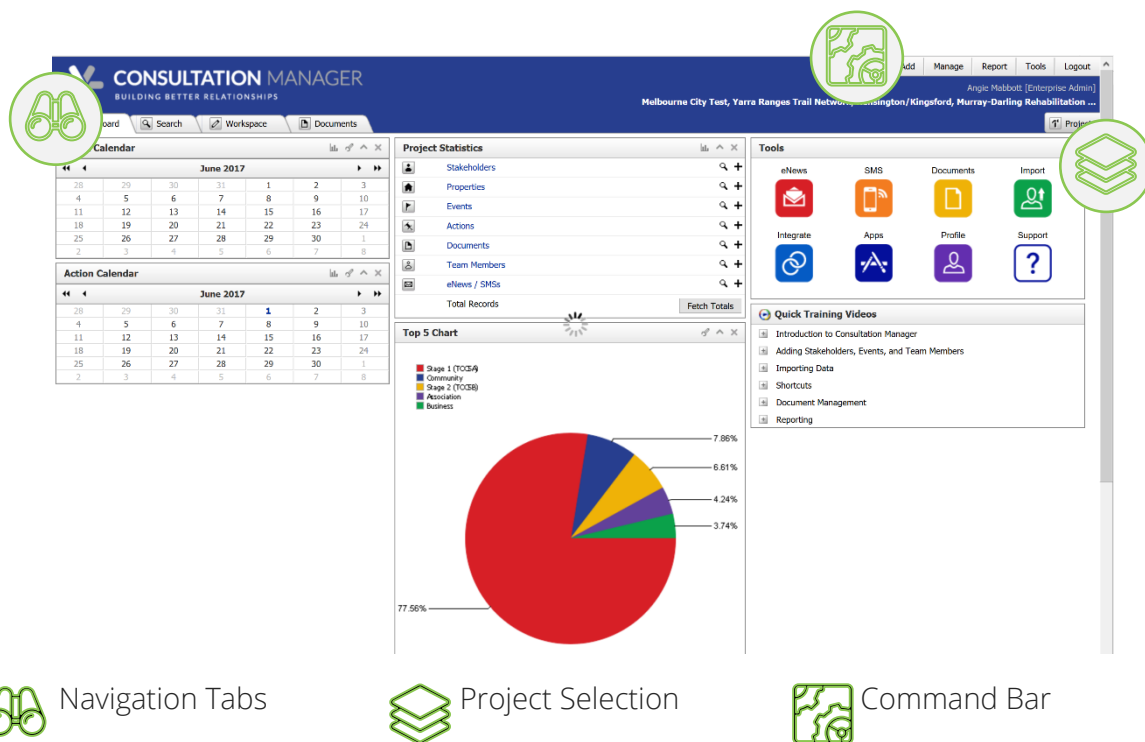
System Layout

User Interface

When logging into CM, you will be taken to the system dashboard. The dashboard features an event and action calendar, overall project statistics, top 5 chart, quick links and a series of self-help training videos.

Take a moment to familiarise yourself with CMs layout, pay attention to the location of the navigation tabs (dashboard, search, workspace and documents), the project selection pop-out and command bar.

The user interface is designed for ease of use and continuity throughout.



Navigation Tabs



Project Selection



Command Bar

Key Icons



Search

Execute search query and/or add additional search parameter to search query.



Add

Add or create a new record.



Save

Save changes and modifications to an existing record.



Delete

Delete or remove an existing record.



Undo /
Refresh

If the changes have not been saved, undo the last change made
OR if the changes have been saved, refresh the page.

Getting Started

Accessing your platform

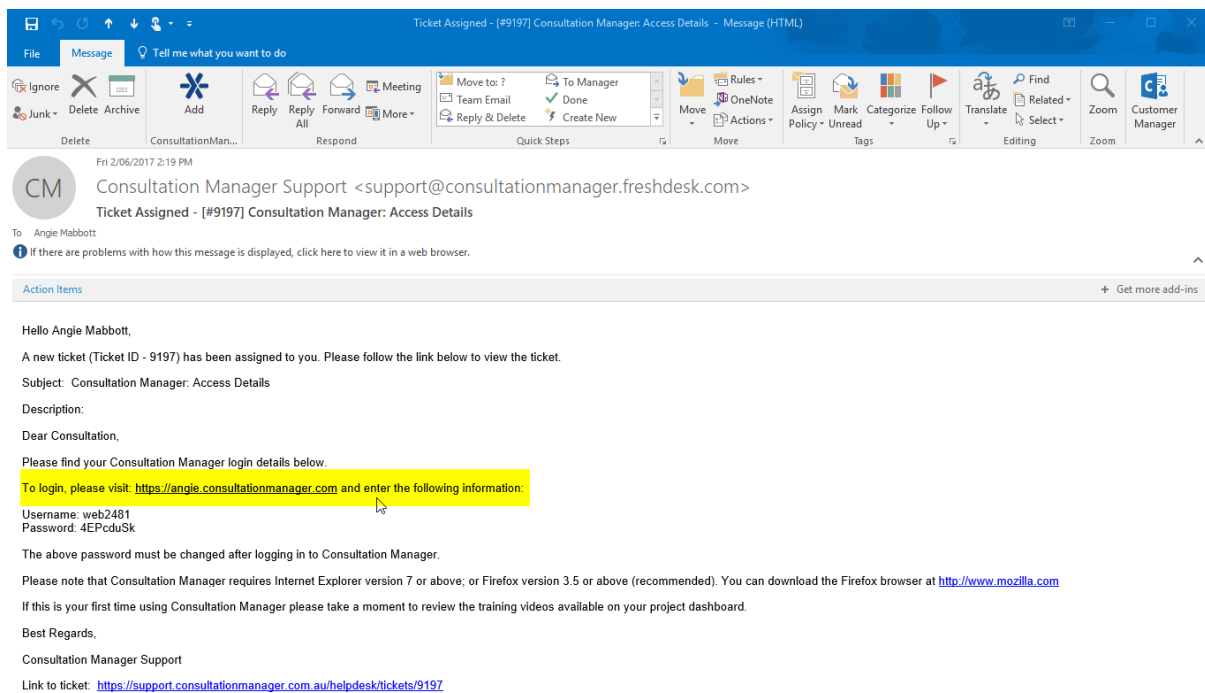
Your Domain

Every CM Enterprise is accessed by a uniform resource locator (URL) or web link. This is usually displayed as a prefix or acronym unique to your organisation, followed by “.consultationmanager.com.au” i.e. <https://prefix.consultationmanager.com.au>.

Once you are created as a team member in your system, you will receive an automatically generated email, with you user credentials. This will include the details of your systems URL. It is important to know your URL, as this is where you will login to CM.



Hint: Bookmark this URL and keep a note for future reference, you will need it every time you access CM.



Ticket Assigned - [#9197] Consultation Manager: Access Details - Message (HTML)

File Message Tell me what you want to do

Ignore Delete Archive Add Reply Reply All Forward More Meeting Move to: ? To Manager Move Rules OneNote Assign Mark Categorize Follow Translate Find Related Zoom Customer Manager

Delete ConsultationMan... Respond Quick Steps Move Actions Tags Editing

Fri 2/06/2017 2:19 PM

CM Consultation Manager Support <support@consultationmanager.freshdesk.com>
Ticket Assigned - [#9197] Consultation Manager: Access Details

To: Angie Mabbott

If there are problems with how this message is displayed, click here to view it in a web browser.

Action Items Get more add-ins

Hello Angie Mabbott,

A new ticket (Ticket ID - 9197) has been assigned to you. Please follow the link below to view the ticket.

Subject: Consultation Manager: Access Details

Description:

Dear Consultation,

Please find your Consultation Manager login details below.

To login, please visit: <https://angie.consultationmanager.com> and enter the following information:

Username: web2481
Password: 4EPcdU5k

The above password must be changed after logging in to Consultation Manager.

Please note that Consultation Manager requires Internet Explorer version 7 or above; or Firefox version 3.5 or above (recommended). You can download the Firefox browser at <http://www.mozilla.com>

If this is your first time using Consultation Manager please take a moment to review the training videos available on your project dashboard.

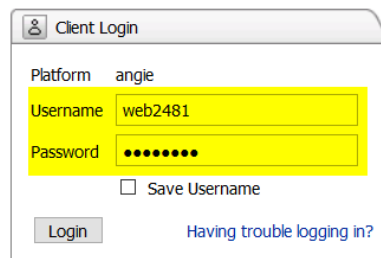
Best Regards,

Consultation Manager Support

Link to ticket: <https://support.consultationmanager.com.au/helpdesk/tickets/9197>

Logging In

To log into CM, go to the URL provided with your credentials in your welcome email. Enter your username and password, exactly how they appear – they are case and space sensitive! Then click login.



A screenshot of a web browser window titled 'Client Login'. The form contains the following elements: a 'Platform' label with the value 'angie'; a 'Username' label with a text input field containing 'web2481'; a 'Password' label with a password input field showing eight dots; a checkbox labeled 'Save Username' which is currently unchecked; a 'Login' button; and a link that says 'Having trouble logging in?'.

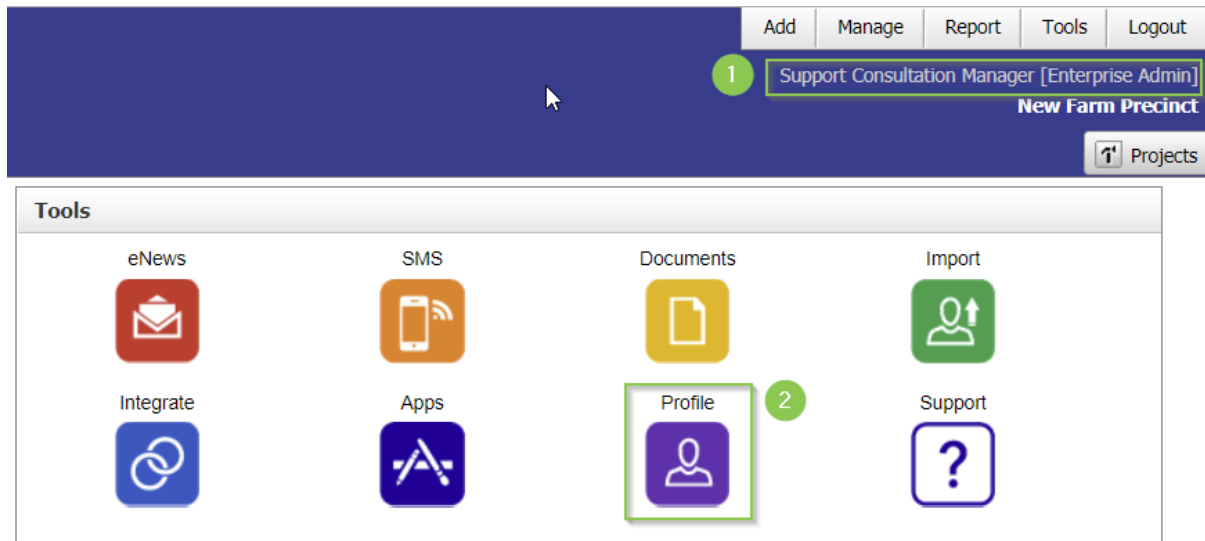
Detected Browser: Firefox53
Fri Jun 02 2017 14:27:45 GMT+1000 (E. Australia Standard Time)

You will then be prompted to reset your password and redirected to the login screen. Once you have successfully logged in, CM's load directly onto the dashboard.

Your Profile

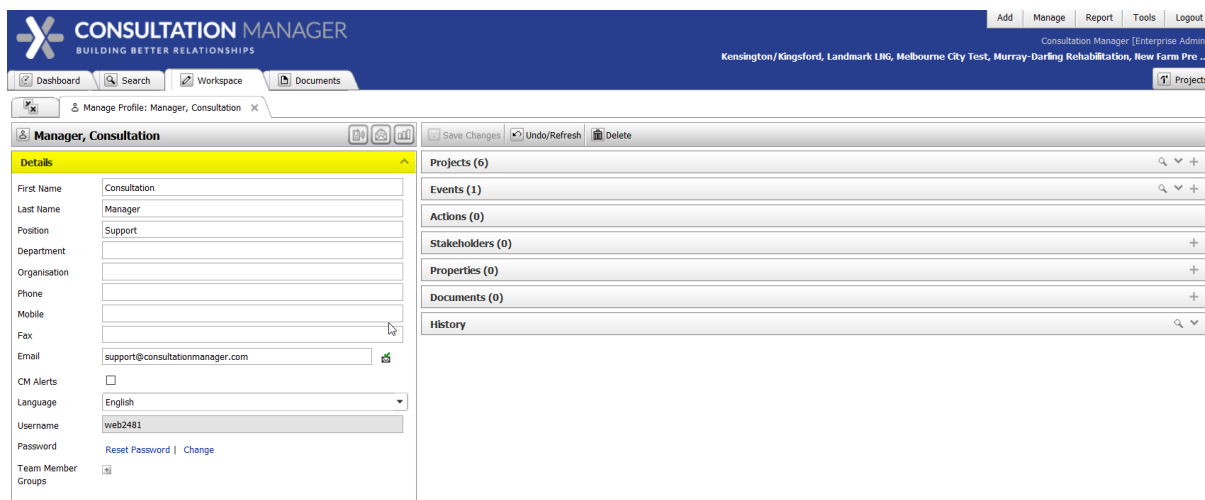
If at any point, you need to update your details, you can do so by accessing and updating your user profile.

You can find your user profile a couple of different ways.



1. Clicking your name at the top of the screen just under the command bar.
2. Clicking 'Profile' in the Tools section on the dashboard.

All available information, including username and email address, will be displayed on the details panel. This information can be updated at any time by changing any details and clicking 'Save Changes'.

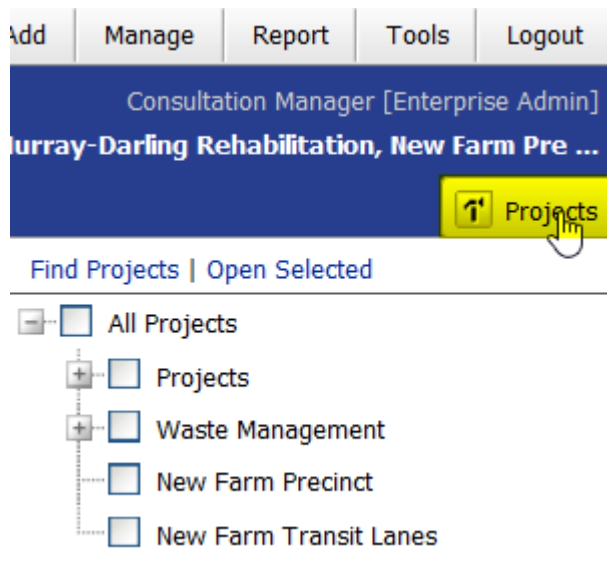


Hint: Nearly all Entities (Stakeholders, Events etc.) within the system have the same basic profile layout. All details will be on the left-hand side, and all its relationships will be on the right-hand side.

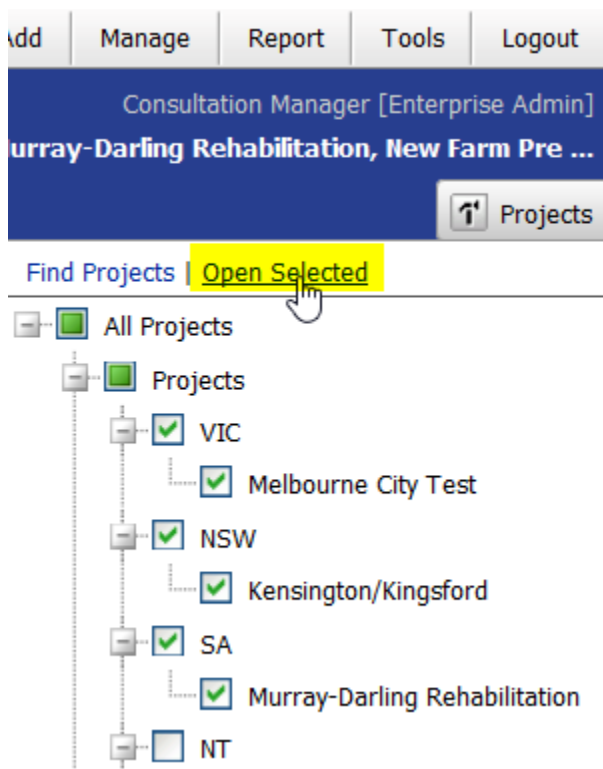
Selecting a Project

CM Enterprise allows users to view multiple projects at once.

For this reason, it is important that you have the correct project areas selected.



To select the relevant project areas, click the project selection tab and your appropriate options will appear.



Using the check boxes, tick the projects you would like to view and then click "Open Selected".

You can have any combination of project areas open at any given time or you can choose to select all. Just note you will only be viewing the data for the projects which you have opened.

System Navigation

Dashboard

When you are logged into CM, you will automatically be directed to the systems dashboard. The dashboard is filled with snapshots, quick links and handy information.



Event Calendar

- 1 Calendar or list display of selected team members and event types.

Action Calendar

- 2 Calendar or list display of selected team members and action status.

Top 5 Chart

- 3 Display the top 5 event types, issues or stakeholder groups.

Quick Training Videos

- 4 A series of self-help training tutorials on system use.

Tools

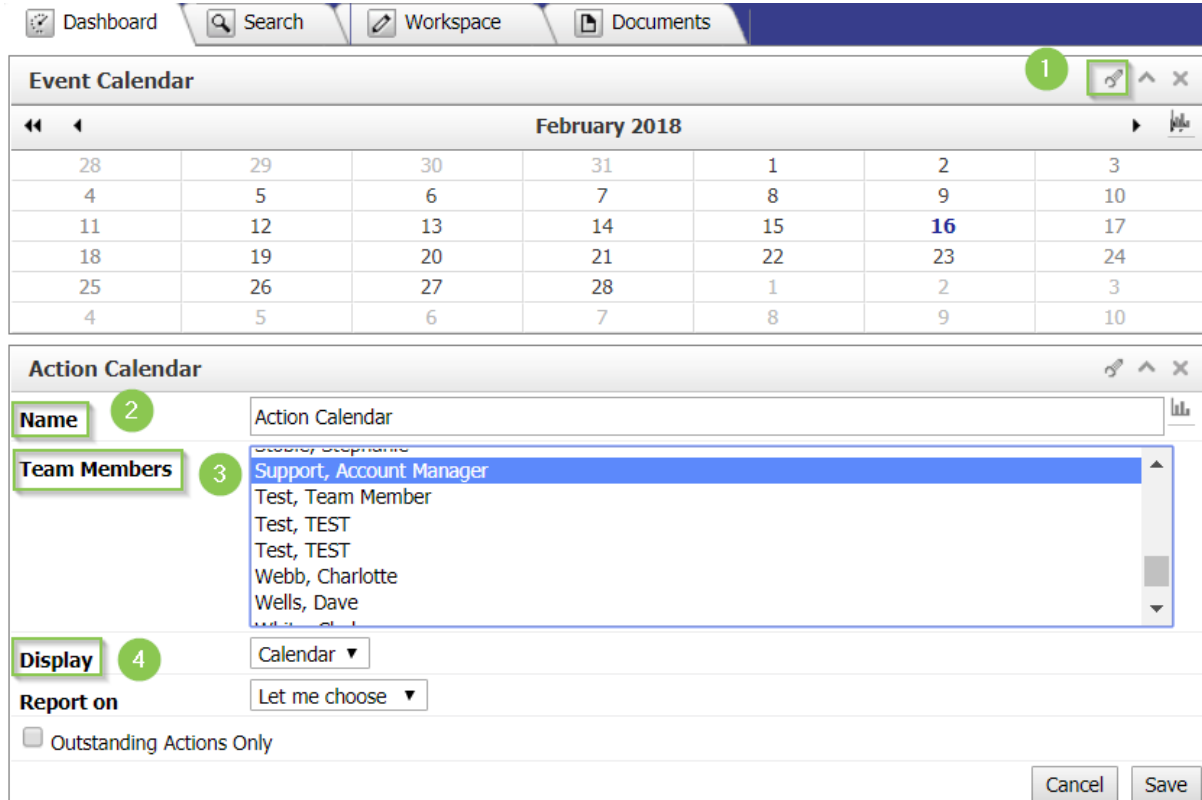
- 5 Links and additional information on commonly used features.

Project Statistics

- 6 Number of records for each entity and document storage.

Calendars

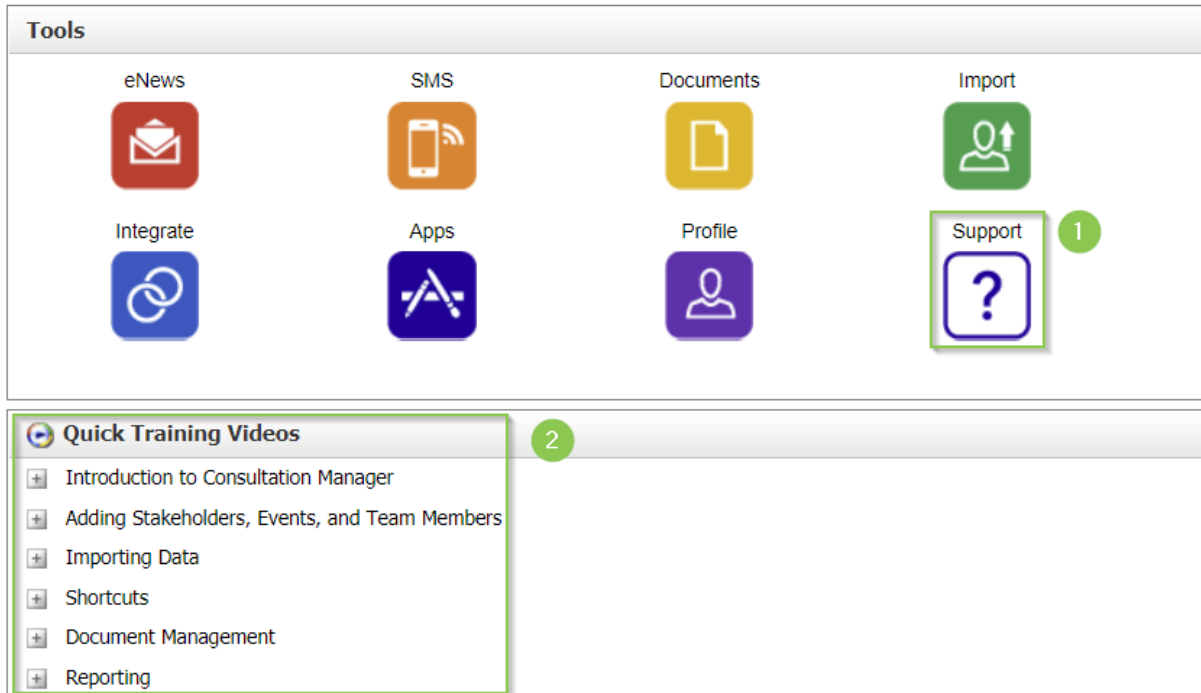
There are 2 calendar widgets available which allow for easy viewing of upcoming Events and Actions.



The screenshot shows the Consultation Manager interface with a top navigation bar containing 'Dashboard', 'Search', 'Workspace', and 'Documents'. Below this, there are two calendar widgets. The first is the 'Event Calendar' for February 2018, showing a grid of dates. The second is the 'Action Calendar' settings panel. This panel includes a 'Name' field (callout 2), a 'Team Members' dropdown menu (callout 3) with a list of users including 'Support, Account Manager', 'Test, Team Member', 'Test, TEST', 'Webb, Charlotte', and 'Wells, Dave'. It also has a 'Display' dropdown (callout 4) set to 'Calendar', a 'Report on' dropdown set to 'Let me choose', and an 'Outstanding Actions Only' checkbox. 'Cancel' and 'Save' buttons are at the bottom right.

1. **Settings:** This is where you can customise how you'd like for it to appear to you and will show the options shown in the Action Calendar.
2. **Name:** This can be changed to reflect what you'd like, but the information pulled into the Calendar would be the same.
3. **Team Members:** Here to you can choose whose information you'd like to see. You can have everyone's, just your own, or specific members of your team. You can multi select by holding down the 'ctrl' key and clicking your selections.
4. **Display:** This is where you can choose which view to show, either a Calendar, or a list detailing specific details or the Event or Action.

Tools



Tools

eNews SMS Documents Import

Integrate Apps Profile Support 1

Quick Training Videos 2

- + Introduction to Consultation Manager
- + Adding Stakeholders, Events, and Team Members
- + Importing Data
- + Shortcuts
- + Document Management
- + Reporting

1. **Support:** This button will send you directly to our Support portal where you can find articles on aspects of the system. You can also use this link to contact our Support team.
2. **Quick Training Videos:** Here are a multitude of different videos you can watch which show you how to use the system.

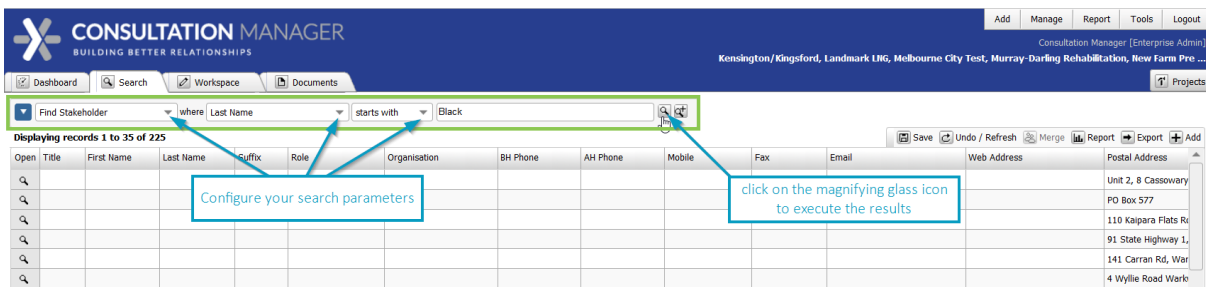
Search

Basic Data Search

To utilise the search function, use the navigation tabs and select “**Search**”. The system allows you to search across single or multiple entity types.

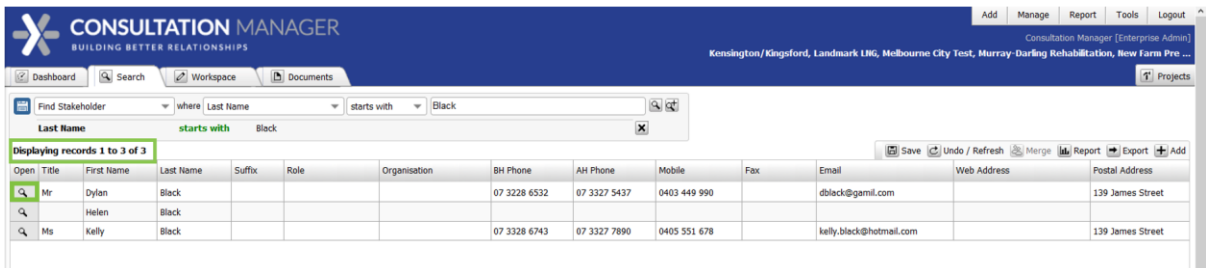
Configure your search parameters using the dropdown and free text fields and click on the magnifying glass icon to execute the results.

For Example, if you wish to find any stakeholder whose last name is “Black”, start by setting your search constraints to “Find Stakeholder” > where “Last Name” > “starts with” > “Black” > Click the magnifying glass.



The screenshot shows the 'Search' tab selected in the navigation bar. The search criteria are set to 'Find Stakeholder' where 'Last Name' 'starts with' 'Black'. A magnifying glass icon is visible at the end of the search bar. Below the search bar, a table displays search results with columns: Open, Title, First Name, Last Name, Suffix, Role, Organisation, BH Phone, AH Phone, Mobile, Fax, Email, Web Address, and Postal Address. The first three rows of results are visible, showing stakeholders with the last name 'Black'.

Once the search has executed, the applicable records will display. You can click the magnifying glass located beside any record to open it in the workspace.



The screenshot shows the search results for the query 'Find Stakeholder' where 'Last Name' 'starts with' 'Black'. The results table displays three records:

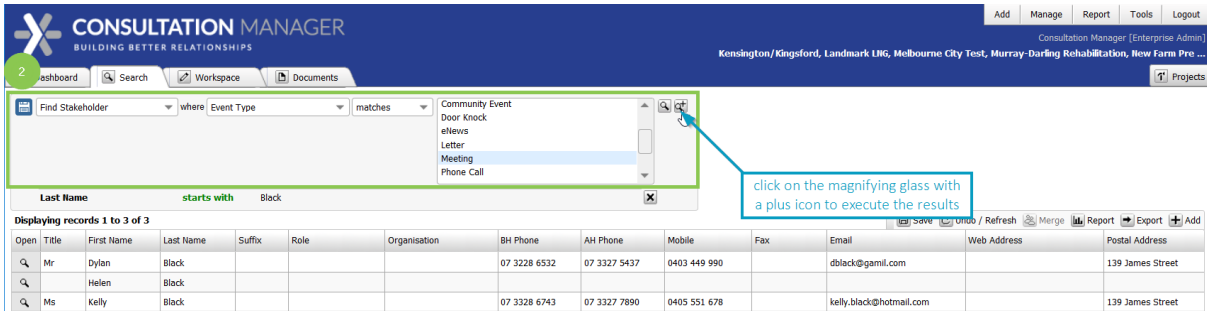
Open	Title	First Name	Last Name	Suffix	Role	Organisation	BH Phone	AH Phone	Mobile	Fax	Email	Web Address	Postal Address
	Mr	Dylan	Black				07 3228 6532	07 3327 5437	0403 449 990		dblack@gamil.com		139 James Street
		Helen	Black										
	Ms	Kelly	Black				07 3328 6743	07 3327 7890	0405 551 678		kelly.black@hotmail.com		139 James Street

Multi-conditional Data Search

The multi-conditional search feature is a simple, yet powerful function that allows you to build detailed search queries and further refine your data outputs.

To complete a multi-conditional search, start by following the basic data search.

Configure your search parameters using the dropdown and free text fields, click on the magnifying glass icon to execute the results.

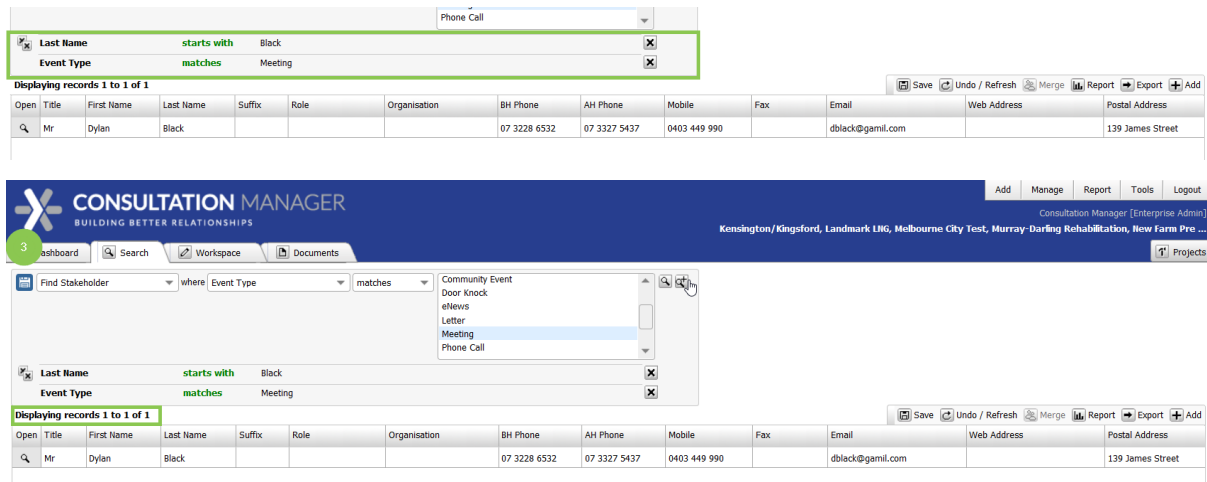


Click on the magnifying glass with a plus icon to execute the results

Open	Title	First Name	Last Name	Suffix	Role	Organisation	BH Phone	AH Phone	Mobile	Fax	Email	Web Address	Postal Address
Q	Mr	Dylan	Black				07 3228 6532	07 3327 5437	0403 449 990		dblack@gamil.com		139 James Street
Q		Helen	Black										
Q	Ms	Kelly	Black				07 3328 6743	07 3327 7890	0405 551 678		kelly.black@hotmail.com		139 James Street

Begin layering your additional condition, again using the dropdown and free text fields. However, this time click on the magnifying glass with a plus icon.

You will note both conditions are now part of your search query.

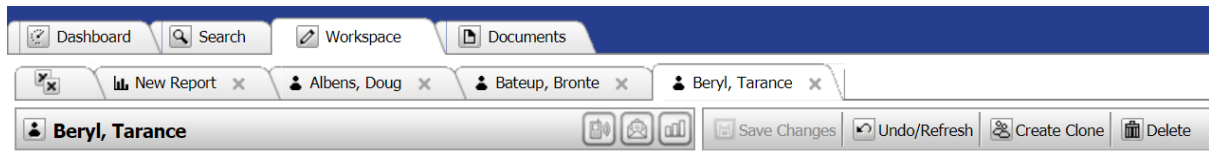


Open	Title	First Name	Last Name	Suffix	Role	Organisation	BH Phone	AH Phone	Mobile	Fax	Email	Web Address	Postal Address
Q	Mr	Dylan	Black				07 3228 6532	07 3327 5437	0403 449 990		dblack@gamil.com		139 James Street

Continue selecting your search conditions until you are satisfied with the results. You can click the **magnifying glass** located beside any record to open it in the workspace.

Workspace

The Workspace tab is the area of the system where users work. This can include tasks like editing entity profiles and generating reports. Each task opens in its own tab, allowing the user to work on multiple items at a time and easily flick between them as necessary.



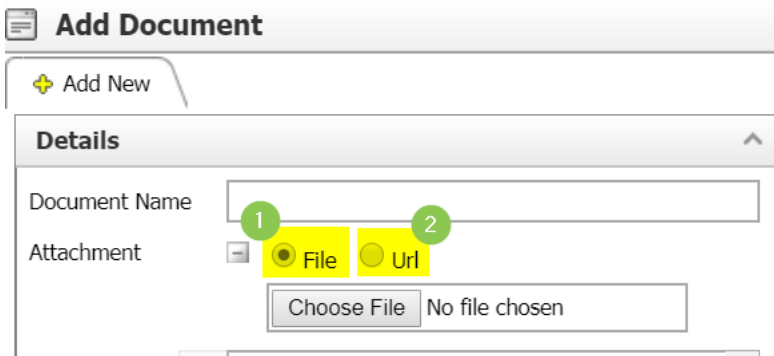
Note that you can easily navigate between any tabs in the system (including Search and Workspace) without losing what is currently open or being worked on.

Documents

Documents refer to any file type and can be associated with any other entity in the system. For example, flyers may be handed out at a public forum. The flyer could be attached directly to the event in the database as a document.

Documents can be recorded in the system in two ways:

1. Uploaded into CM, or
2. Via a link to your organisation's document management system.



You can then assign a document to another entity via the below instructions on *Adding Existing Data*.

Recommended Workflow

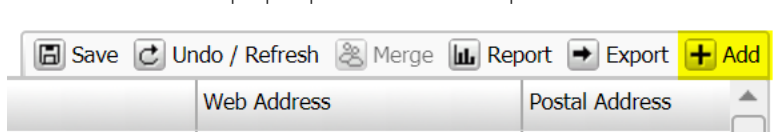
There is a recommend workflow we have found to be most effective when entering data into the system.

Search First

We always recommend searching for a stakeholder prior to adding a new one as per the above instructions. This is to reduce duplicate entries of the same Stakeholder which can lead to confusion. If the stakeholder is not already in the system, follow the below instructions to create them.

Adding a Stakeholder

4. Select “Add” on the right-hand side of the Search tab to add a new Stakeholder. The Add New pop-up window will open.



The screenshot shows a toolbar with the following buttons: Save, Undo / Refresh, Merge, Report, Export, and Add (highlighted in yellow). Below the toolbar are two input fields: 'Web Address' and 'Postal Address'.

5. In the new window, populate the Stakeholder's details
6. Filling out as much data as you have for the Stakeholder will make for a richer database.
7. Note that most clients will use the Stakeholder's address as their mailing address and then create a related Property for their physical address.
8. **Stakeholder Groups:** select the Groups that this Stakeholder is associated with.
9. **Distribution Lists:** select the Distribution Lists the Stakeholder will be subscribed to for eNews/SMS campaigns.
10. Click **Create**, then **Continue** and the stakeholder's profile will open in the Workspace.



Hint: This process can be repeated for any entity within the system by changing the first drop-down menu to the type of entity you wish to create.

Adding an Event directly from the Stakeholder

Typically, Stakeholders are only entered into the system after they've had an interaction with you or another member of your team. Once you've found the relevant Stakeholder, or created them, using the above process, you can create or assign existing data to it to represent certain relationships.

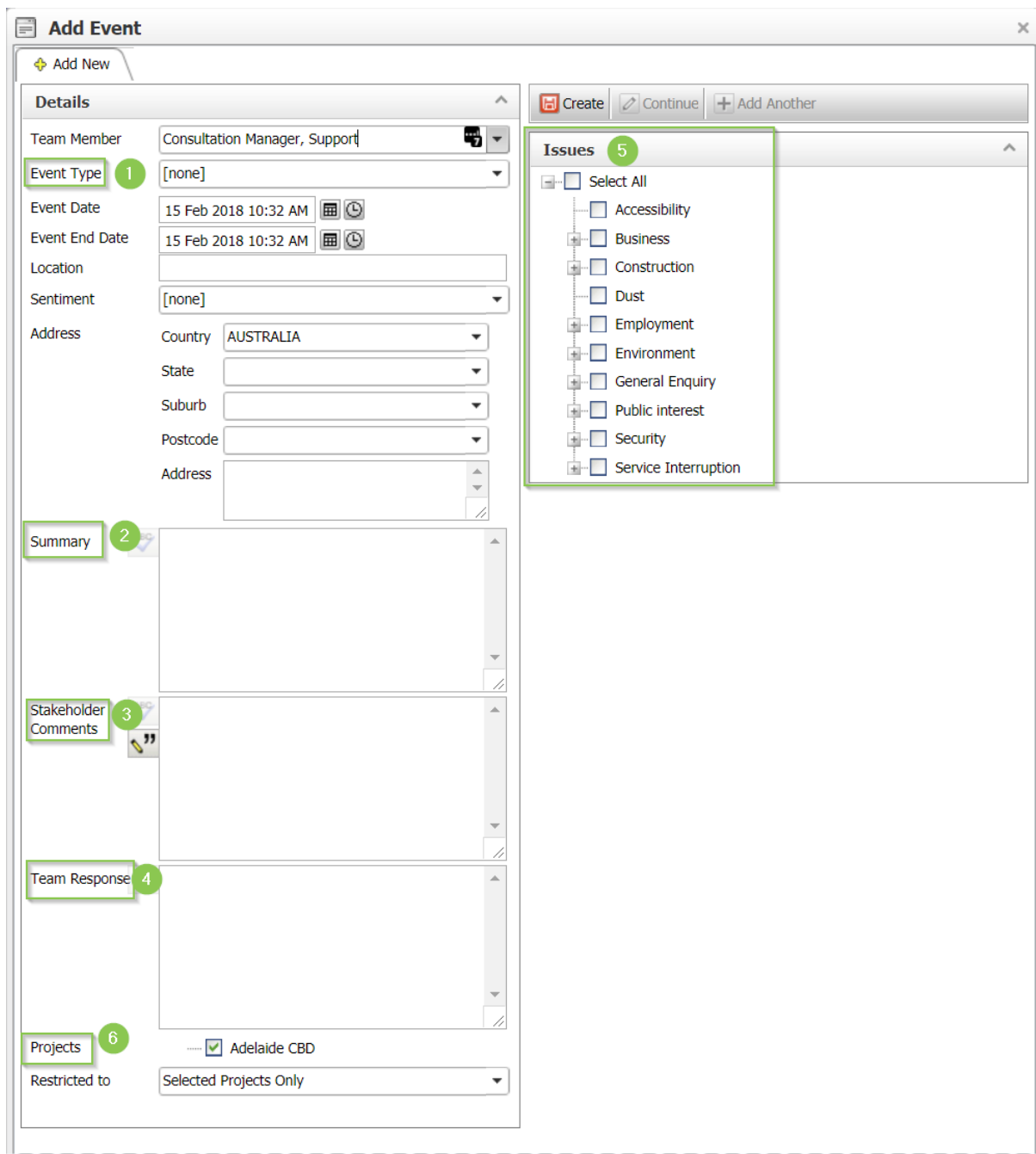


Hint: To see how to add multiple Entities at once, go to our 'Assign Existing data in bulk' section.

To add an Event directly to a Stakeholder, open the Stakeholder's profile, and look for the Event strip on the right-hand side.



Look for, and click on, the small "+" button on the right-hand side of the strip to open a pop-up menu for your Event details.



1. **Event Type:** This is where you specify *how* you interacted with the stakeholder. For example, via Phone Call or Email. This is a mandatory field.
2. **Summary:** This is a short overview of the interaction, like a subject of an email.
3. **Stakeholder Comments:** This is a more comprehensive summary where you include a richer description of what the Stakeholder said during your interaction.
4. **Team Response:** This section is to include what response the team member had to the Stakeholder during the interaction. This section is useful to ensure continuous messaging throughout the team.
5. **Issues:** This is where you can select what topics the conversation included. This is a mandatory field.
6. **Projects:** This is where you select what Project the Event is in relation to. This is a mandatory field.

After you've included all the details, click 'Create' and then 'Continue' for it to open in the Workspace where you can continue to edit or add details.

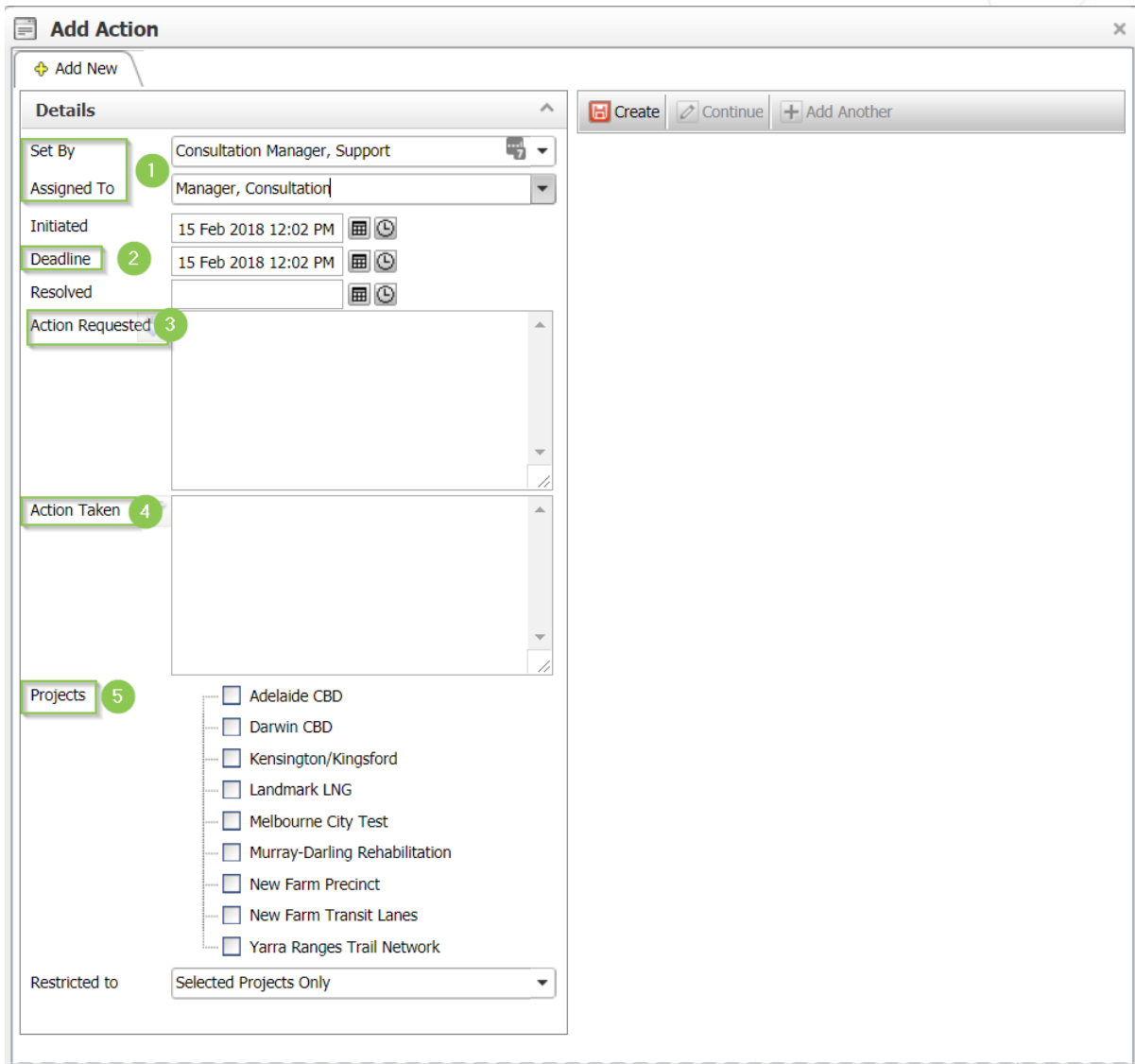
Adding an Action from an Event

An Event may include deliverable outcomes you or another member of your team are responsible for.

These can be managed by creating an Action relating to the Event to track the status of these outcomes.

To add an Action directly from a created Event, open the Event's profile, and look for and click on the small "+" button on the Action strip.

This will create a pop-up menu for all the Action details.



Add Action

✚ Add New

Details

Set By 1 Consultation Manager, Support

Assigned To 1 Manager, Consultation

Initiated 15 Feb 2018 12:02 PM

Deadline 2 15 Feb 2018 12:02 PM

Resolved 15 Feb 2018 12:02 PM

Action Requested 3

Action Taken 4

Projects 5

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

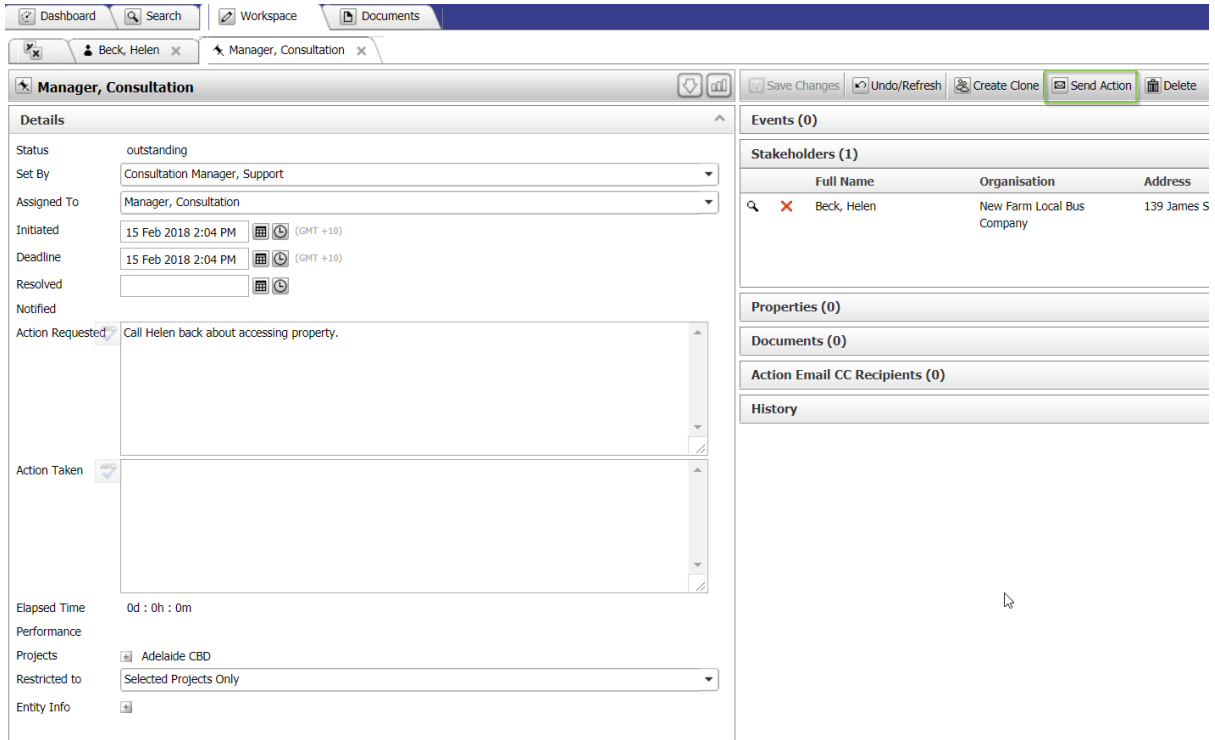
Restricted to Selected Projects Only

Create Continue Add Another

1. **Set by/Assigned to:** These two drop down menus are where you allocate who is the Team Member allocating the Action, and who is responsible for completing the Action. *These will default to your own profile but you can change this by selecting the down arrow.*
2. **Deadline:** This is where you put the deadline for the Action to be completed by.
3. **Action Requested:** This is where you outline what exactly needs to be done for this action to be completed.
4. **Action Taken:** This is to be filled in once the requested action has been finalised by the Team Member it has been assigned to. It is not usual for this to be filled in when the Action is being created.
5. **Projects:** This is where you select what Project the Action is in relation to. This is a mandatory field.

Once you've input all details, click 'Create' and 'Continue' to open the Action profile in the Workspace.

Once you've created the Action, you need to click 'Send Action' in order for the Team Member who the Action is assigned to for an email to be automatically sent informing them.



The screenshot shows the 'Manager, Consultation' interface. The 'Details' section on the left includes fields for Status (outstanding), Set By (Consultation Manager, Support), Assigned To (Manager, Consultation), Initiated (15 Feb 2018 2:04 PM), Deadline (15 Feb 2018 2:04 PM), Resolved, and Notified. The 'Action Requested' field contains the text 'Call Helen back about accessing property.' The 'Action Taken' field is empty. The 'Elapsed Time' is 0d : 0h : 0m. The 'Performance' section shows 'Projects' as 'Adelaide CBD' and 'Restricted to' as 'Selected Projects Only'. The 'Entity Info' field is empty. The right sidebar shows 'Events (0)', 'Stakeholders (1)' with a table containing one entry for 'Beck, Helen' from 'New Farm Local Bus Company' at '139 James S', 'Properties (0)', 'Documents (0)', 'Action Email CC Recipients (0)', and 'History'. The 'Send Action' button is highlighted in the top right of the main panel.



Hint: If you need to reallocate this Action to someone else after it's already been sent, this turns into a 'Send Reminder' button which sends another email to the new Team Member responsible for it.

Assigning Existing Data in bulk

Once an entity is created, you can assign additional relevant data to it in order to represent certain relationships. This is most commonly completed from an entity's profile.

For example, if there was an Event that a group of Stakeholders attended, they could be related back to that event in the system.

1. From the event's profile, select the add button on the far-right hand side of the screen along the Stakeholders bar and an Add New pop-up will appear.

Stakeholders (1)						
Full Name	Organisation	Address	BH Phone	Mobile	Email	Link

2. Filter the search conditions as in the search tab to find the relevant stakeholder or stakeholders.

Assign Related Stakeholder

Remove
Assign
Add New

Find Stakeholder where Stakeholder Group matches

Environmental Group
Government
Media
Partner Organisation
School
University
[Any Stakeholder Group]

New Search

3. Once you have the stakeholder or list of stakeholders you wish to assign to the event, you can either:
 - a. Select the green add button next to the relevant stakeholder (1), or
 - b. Bulk assign the entire filtered list of stakeholders via the bolded green add button next to first name (2).

Once the added stakeholder disappears from the list, it has been added to the event and you can close the pop-up window.

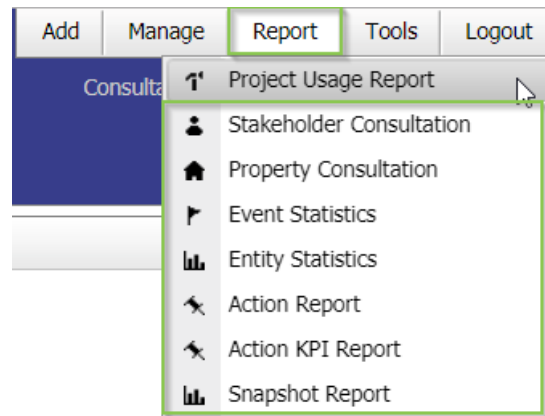
							Linked Projects
Full Name	Organisation	Address	BH Phone	Mobile	Email		
<div>2</div> <div>1</div> + Baggely, Ruth	Flower Are Us	130 Jame Street NEW FARM QLD 4005 AUSTRALIA	07 3358 9565	0403 564 430	ruth@gmail.com		New Farm Precinct, New Farm Transit Lanes, Queen St Bikeway

This process can be repeated for any entity in the system.

Reporting

CM has 7 reports readily available within the system. Each report is highly customisable to reflect what information you need.

Reports can be generated in a couple of different ways, but the easiest is from the Report Menu found in the Command Bar in the upper right-hand corner of the screen.

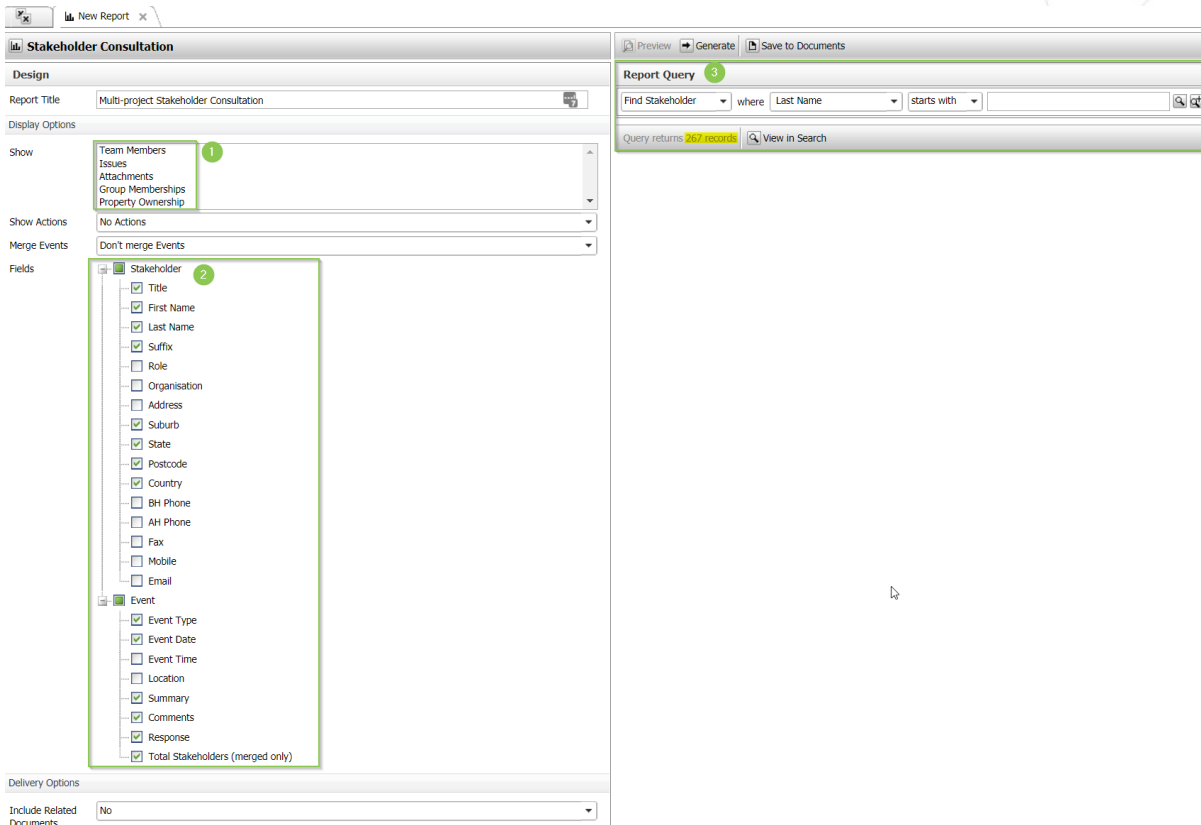


Report Types

Stakeholder Consultation

This report is the “who said what” report. You can search and refine the query to a specific Group, location, Issue etc. and run the report to establish interactions that have occurred with those Stakeholders. The Summary, Stakeholder Comments and Team Response fields from the related Events translate across qualitatively in a Word document and can be easily edited.

There are some fields you can customise before running the report to make sure all the information you want comes through to the report.



1. **Display Options:** You can choose to show extra information regarding the Events in the report. For example, you can include to show what Issues were raised in each Event, as well as any Team Members that were involved. You can multi-select options by holding the 'Ctrl' key down and clicking the options.
2. **Fields:** Here you can customise which personal information is pulled through pertaining to the Stakeholder and Event. This is useful if the Stakeholder data is sensitive but the Event data needs to be publicly shown. *Please note, this doesn't edit out any names or personal information put into the Summary, Stakeholder Comments, or Team Response fields.*
3. **Report Query:** This works the same as the basic Search function within CM. Here you can use our multi-conditional search function to narrow down to find the exact information you need to report on. At the bottom it will show you how many search results have been found matching your search criteria.

Property Consultation

This report functions the same as the Stakeholder Consultation Report as shown above but focuses on Properties within the system.

The reporting layout is the same and can be used in the same ways.

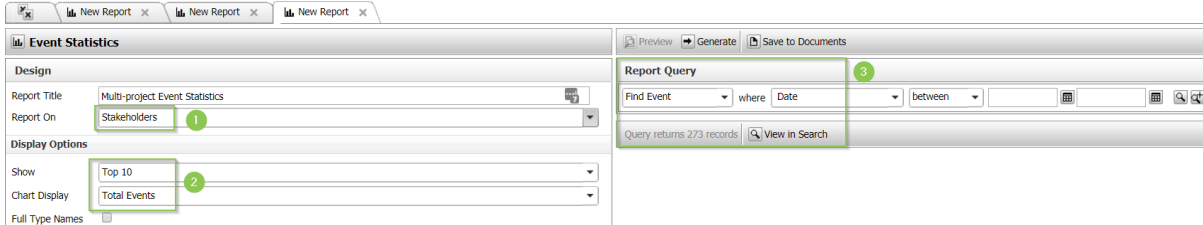
Event Statistics

This report provides a quantitative overview of who you're engaging with, about what and through which channels. The three-page report provides analytics on:

- * Issues raised by Stakeholders (which Issues are the most contentious)

- * Types of Events (which channels you're communicating through most)
- * Stakeholder Groups communicating with you the most and least

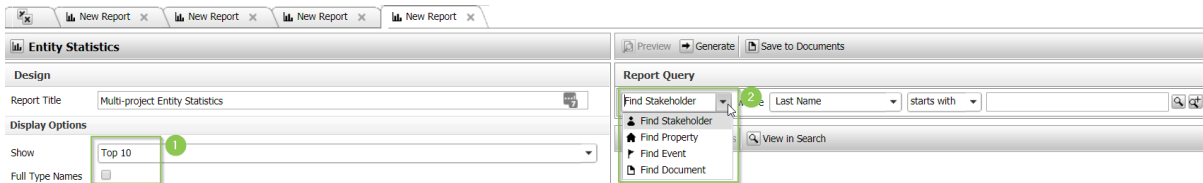
Note that a customisation is available known as Sentiment which allows you to track and report on your Stakeholders' temperament throughout various stages of a project. If instated, this appears as an additional page in this report.



1. **Report on:** You can choose to report on Stakeholders or Properties within the system.
2. **Display Options:** Here you can customise how many Issues, Event Types etc. you'd like to show in the report as well as what type of pie chart you'd like to display.
3. **Report Query:** This works the same as the basic Search function within CM. Here you can use our multi-conditional search function to narrow down to find the exact information you need to report on. At the bottom it will show you how many search results have been found matching your search criteria.

Entity Statistics

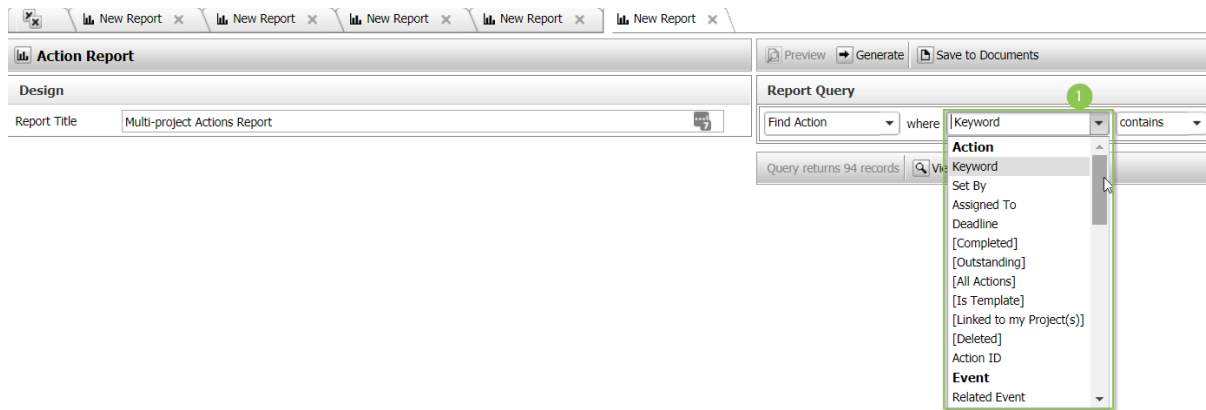
This report enables you to select Stakeholder, Property, Event, or Document and report on the different categories established against it in the system. For example, a Stakeholder Entity Statistics report demonstrates how many Stakeholders are in each Stakeholder Group and Distribution List.



1. **Display Options:** Here you can choose the amount of results that come across in the report. E.g. Stakeholder groups.
2. **Report Query:** This works the same as the basic Search function within CM. Here is where you can choose which entity to report on. Here you can use our multi-conditional search function to narrow down to find the exact information you need to report on. At the bottom it will show you how many search results have been found matching your search criteria.

Action Report

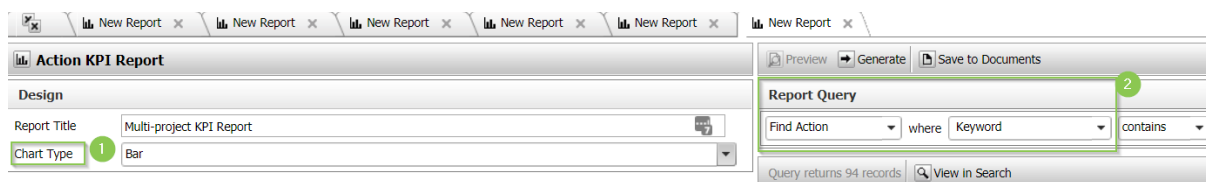
This report allows you to establish the number of Actions completed or outstanding against Stakeholders. It outlines the date set, deadline and date resolved, as well as the action requested, and action taken.



1. **Report Query:** You can narrow search results to show particular varieties of Actions, for example Actions assigned to particular Team Members, any that are outstanding or any with a specific deadline.

Action KPI

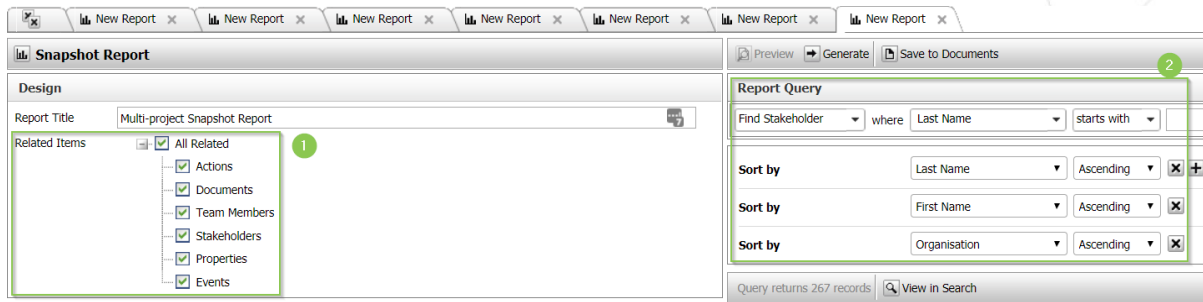
This report enables you to establish the numerical values around Action completion within your team and whether they are meeting their KPIs. This is the only report which comes through in an excel spreadsheet. It details all related data, as well as provides relevant graphs pertaining to the data within the report.



1. **Chart Type:** You can choose what types of charts you'd like displayed. E.g. Bar graph, pie chart.
2. **Report Query:** You can narrow search results to show varieties of Actions, for example Actions assigned to particular Team Members, any that are outstanding or any with a specific deadline.


Snapshot Report

The snapshot report is a highly flexible comprehensive report which can be used as a briefing tool, as it shows a comprehensive summary of everything relating to specific entities you'd like to report on. It shows all details, as well as all relationships within the profile of the entities you want to report on.



1. **Related Items:** This is where you can select which related items you want to bring into the report. The more selected, the more comprehensive and detail rich the report will be.
2. **Report Query:** This works the same as the basic Search function within CM. On this report you can also choose how you'd like it to sort the information within the report. You can use our multi-conditional search function to narrow down to find the exact information you need to report on. At the bottom it will show you how many search results have been found matching your search criteria

You can also access this report directly from an Entity's profile and it will automatically input that entity's details into the Search fields.

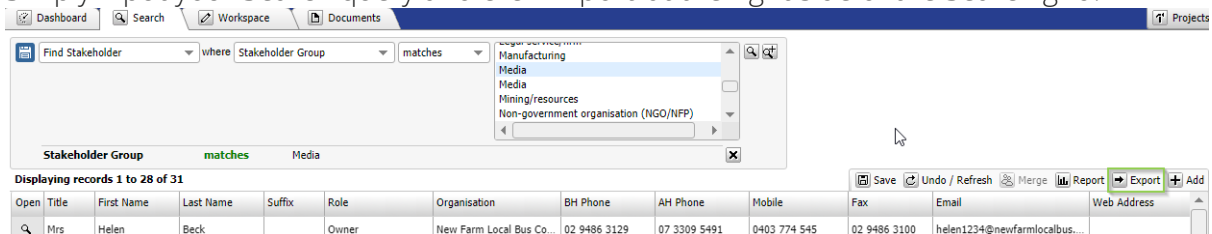


Exporting

Whilst not classified as a report, this function allows you to extract lists of data directly from the Search results. This is especially useful if you need a list of details about entities within the system.

This export generates in an excel format of any Search results delivered.

Simply input your Search query and click 'Export' at the right side of the Search grid.



The screenshot shows the 'Find Stakeholder' search interface. The search criteria are set to 'Stakeholder Group' and 'matches'. The results are displayed in a table with columns: Open, Title, First Name, Last Name, Suffix, Role, Organisation, BH Phone, AH Phone, Mobile, Fax, Email, and Web Address. The first record is for Mrs Helen Beck, Owner of New Farm Local Bus Co... The 'Export' button is highlighted in the top right corner of the table.

Open	Title	First Name	Last Name	Suffix	Role	Organisation	BH Phone	AH Phone	Mobile	Fax	Email	Web Address
	Mrs	Helen	Beck		Owner	New Farm Local Bus Co...	02 9486 3129	07 3309 5491	0403 774 545	02 9486 3100	helen1234@newfarmlocalbus...	

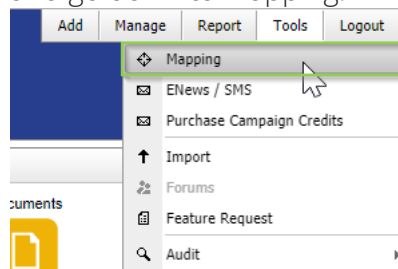
Mapping

Consultation Manager's mapping functionality allows you to accurately pinpoint stakeholders, hotspots for common issues and interactions, and properties in your database.

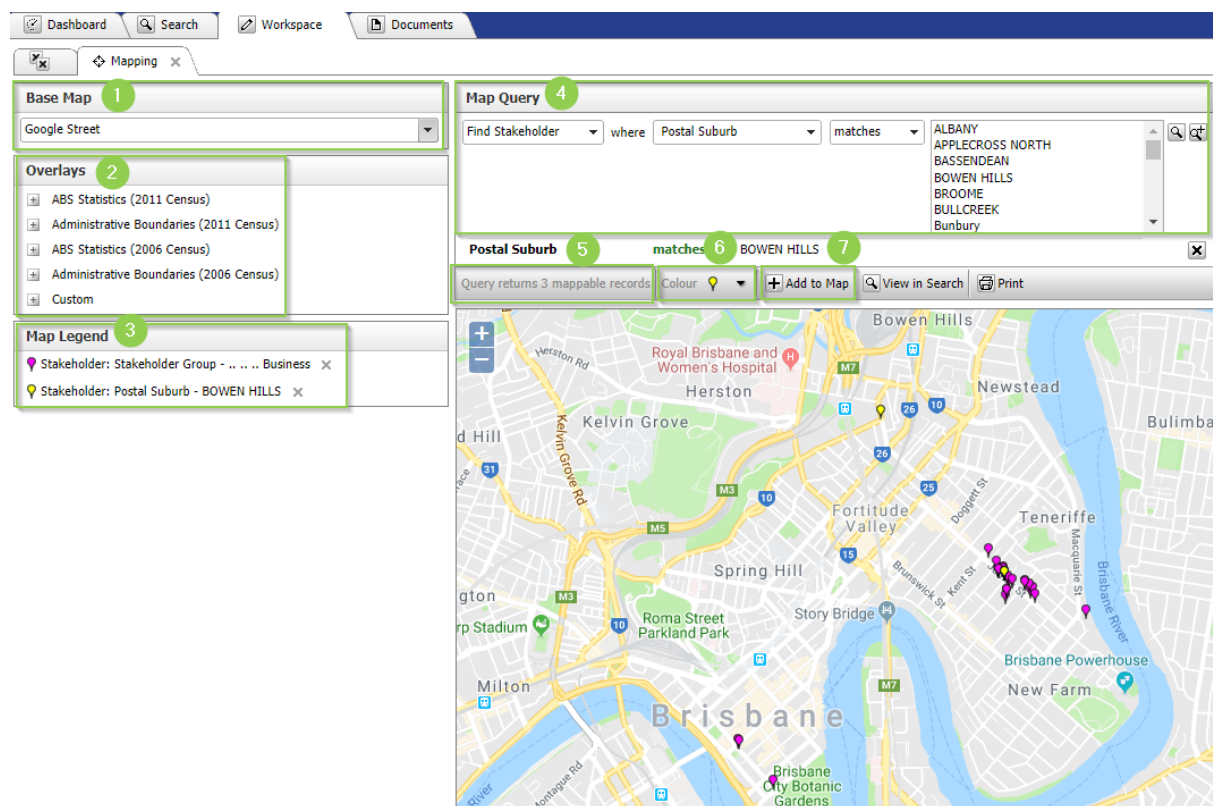
Easily identify, predict and act on high-activity areas by using this feature.

You can plot on the map using searches for 3 Entities within the system: Events, Stakeholders, and Properties.

You can access the Mapping feature by going to the Tool menu found in the Command Bar and go down to Mapping.



This will open a new tab in the Workspace where you can find Entities within the system using the normal Search functions and plot them on the map.




1. **Base Map:** You can choose what type of view to have your map look like. Options include: Google Hybrid, Google Street, Google Satellite, and Google Physical.

2. **Overlays:** You can choose to put an overlay over your search results, such as suburb boundaries, ABS statistics boundaries etc.
3. **Map Legend:** This is where you can see what searches you have already pinned on your map, and what colour they appear as.
4. **Map Query:** This is where you can perform your searches to find results to map exactly the same as in the regular search tab.
5. **Query results:** This indicates how many results have been returned from your search that are mappable. This means, the address put in the Event, Stakeholder, or Property address field is valid according to Google.
6. **Pin colour:** This is where you can dictate what pin colour you'd like that search query to show up as.
7. **Add to Map:** Once you've gotten the results you're after, click this button to pin them to the map. The pin will also then be reflected on the Map Legend.

It is important to note that you can only plot results from Entities that have a complete valid address verified by Google. A valid address looks like this:

Address  123 Fake Street
NEW FARM QLD 4005
AUSTRALIA 

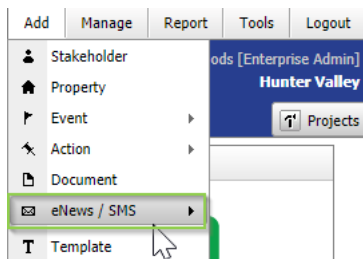
You can tell the address has been validated by Google by the green tick. This validation occurs automatically when a full address is saved on an Entity.
Any Entities that do not have an Address against them will not turn up in the search query.

 **Hint:** If you see a pin on the map and you'd like to know more about it, simply click on the pin to open the Entity's profile up in the workspace.

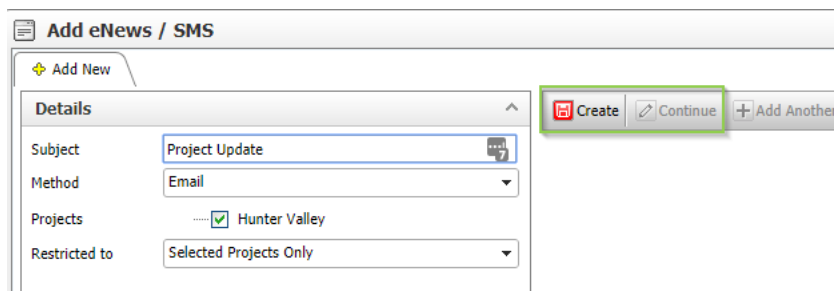
eNews

Our eNews feature allows you to keep your stakeholders updated regularly or send urgent messages immediately with ease. Once these messages have been sent, an Event is automatically related to the Stakeholders, so you know exactly who has received the message, and it comes out in reports.

You can add a new eNews by going to the Add menu on the Command Bar and down to eNews/SMS.



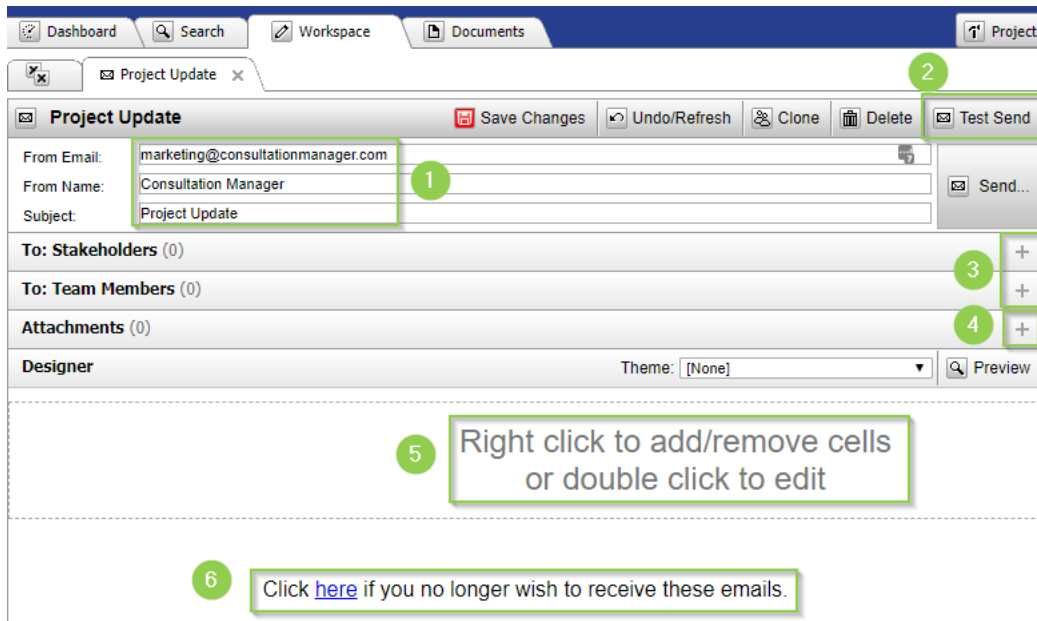
This will create a pop-up window where you can dictate the subject, choose the method (Email or SMS), and the Project it's to be associated with.



Once you've filled in your details, click 'Create' and 'Continue' to open the eNews in the workspace to begin customising.

Email

After opening the email campaign in the workspace, there are several ways you can tailor the message to suit your organisation's needs.



Dashboard Search Workspace Documents Projects

Project Update

Project Update Save Changes Undo/Refresh Clone Delete Test Send

From Email: marketing@consultationmanager.com

From Name: Consultation Manager

Subject: Project Update

To: Stakeholders (0)

To: Team Members (0)

Attachments (0)

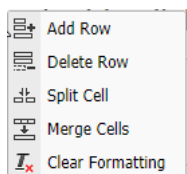
Designer Theme: [None] Preview

Right click to add/remove cells or double click to edit

Click [here](#) if you no longer wish to receive these emails.

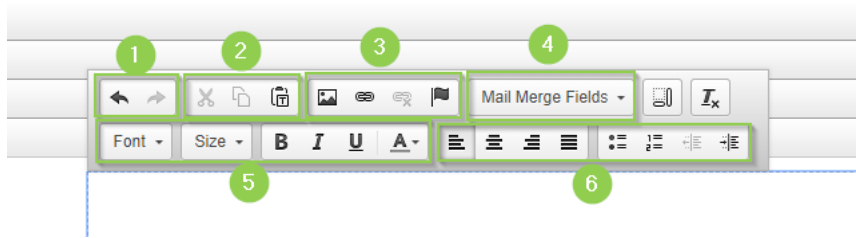
1. **From details and subject:** These fields are auto populated with your details, however can be changed to reflect what your organisation needs. We highly recommend having a 'From' email which is manned – meaning any replies your Stakeholders send in response to the communication will be seen by someone.
2. **Test Send:** This is where you can choose to see how your eNews will appear to your Stakeholders by sending it yourself first. It will send the test to the email in your profile.
3. **Adding Stakeholders and Team Members:** This is where you can choose to add Stakeholders or Team members who you would like to receive this communication. This is the same process shown in the 'Assign existing data in bulk' section.
4. **Attachments:** You can attach any file type to your correspondence. Keep in mind some Stakeholder's mail servers may not be able to download large file types.
5. **Designer:** This is where you can customise your message. Further information is below.
6. **Opt-out function:** This link is included on any email sent out as part of anti-spam laws to give Stakeholders the option to stop receiving messages.

Right clicking on the Designer window will give you the option to manage the cells within your message.




This enables you to input headers, text beside images etc.

Double clicking on the Designer window will open the editing options available.



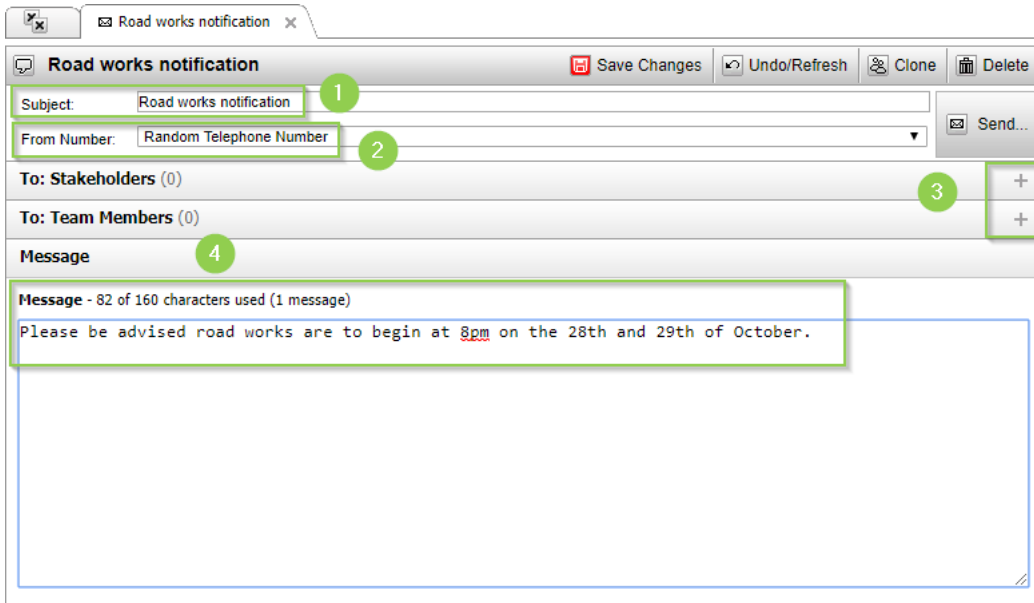
1. **Undo/Redo:** You can easily undo or redo any mistakes with a click of a button.
2. **Cut/Copy/Paste:** Like any other editor, you can cut, copy, paste any information.
3. **Images and links:** Insert any image within the Consultation Manager system or import one. Add in links to websites etc.
4. **Mail Merge:** To personalise your emails a little more, you can incorporate mail merge features where it takes information from the Stakeholder's profile and personalises it. For example, choosing First name will input the information in the Stakeholder's First Name field and input it into the email where you like.
5. **Font:** Choose the type, size and colour of the font you're using. Also gives options to bold, italicise and underline text.
6. **Alignment:** Select how you'd like your text to be aligned in the space and incorporate bullet points.

Once you've customised your correspondence, do a test send to make sure everything appears how you'd like. Once you're satisfied, click 'Send' and it will send the message out to any related Stakeholders and Team Members.

 *Hint: Test Sends will not include any attachments.*

SMS

Sending eNews SMS works similarly to emails where you can select the Stakeholders and Team Members to send it to, but with a few differences.



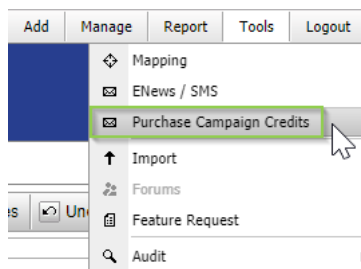
1. **Subject:** Like the email eNews, you can tailor this field at any time before the message has been sent out.
2. **From Number:** The number this appears to your Stakeholders is a randomly generated number from our third-party provider.
3. **Adding Stakeholders and Team Members:** This is where you can choose to add Stakeholders or Team members who you would like to receive this communication. This is the same process shown in the 'Assign existing data in bulk' section.
4. **Message:** This is where you can input the message you'd like your Stakeholders to receive. Anything over 160 characters classifies as multiple messages. Please note that no opt-out function automatically goes on these messages, so you can input your own method of Stakeholders communicating their desire for lack of communication.

Cost

Sending out messages as an email which has no costs associated in an Enterprise System, however SMS sends do incur a fee.

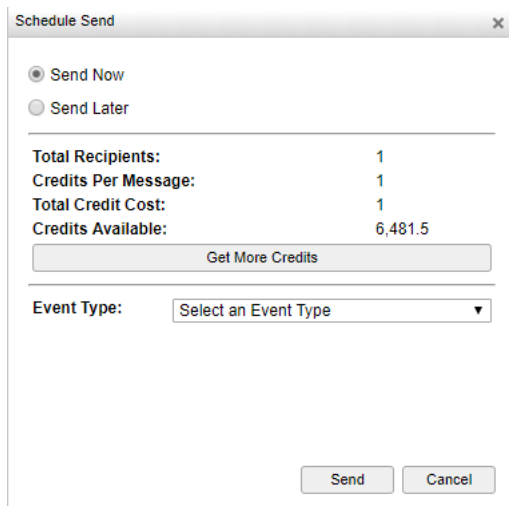
We manage these costs via a crediting system, where your organisation can purchase a package of credits that can be used for this purpose.

These can be purchased by going to the Tools menu on the Command Bar, and down to Purchase Campaign Credits.



This will create a pop-up window which shows the available packages and an indicator of how many credits a standard SMS will cost per send.

When you click 'Send' on the eNews or SMS, a window will appear indicating how many credits the campaign will cost, as well as how many credits are available to use.



Total Recipients:	1
Credits Per Message:	1
Total Credit Cost:	1
Credits Available:	6,481.5

From here you can choose to purchase more credits, send, or cancel and go back to the editing screen.

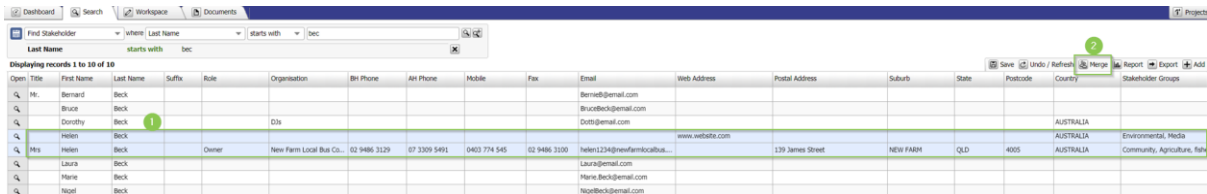


Hint: You cannot do a test send for an SMS campaign.

Merging duplicate entries

It's quite common to come across 2 Stakeholder entities for the same person. A notification also appears when you create a new Stakeholder which may match another in the system.

Our merge function takes all the information from both entities (including Stakeholder groups, distribution lists etc.), and creates a new entity with all of the information that was recorded against both original entries.



Open	Title	First Name	Last Name	Suffix	Role	Organisation	Bn Phone	Alt Phone	Mobile	Fax	Email	Web Address	Postal Address	Suburb	State	Postcode	Country	Stakeholder Groups
Mr.	Bernard	Beck									bernab@gmail.com							
Mr.	Bruce	Beck									BruceBeck@gmail.com							
Ms	Dorothy	Beck				QIs					Dotti@gmail.com						AUSTRALIA	
Ms	Helen	Beck			Owner	New Farm Local Bus Co.	02 9486 3129	07 3309 5491	0403 774 545	02 9486 3100	helen1234@newfarmlocalbus...	www.newfarm.com	139 James Street	NEW FARM	QLD	4005	AUSTRALIA	Environmental, Media
	Laura	Beck									Laura@gmail.com							
	Hanna	Beck									HannaBeck@gmail.com							
	Nigel	Beck									NigelBeck@gmail.com							

1. Once you've found the 2 or more multiple entities you wish you merge, highlight them by clicking on both rows while holding down the 'ctrl' button. Once you've highlighted them, the rows will turn blue.
2. After you've highlighted the duplicate entities, click the Merge button in the menu at the top right corner of the search grid. After clicking the Merge button, it will open the new entity in the Workspace, where you can see all the information that has come across.

Dashboard
Search
Workspace
Documents

Beck, Helen
New: Beck, Helen
Merged: Beck, Helen

Beck, Helen
Save Changes
Undo/Refresh
Create Clone
Delete

Details

Title	Mrs
First Name	Helen
Last Name	Beck
Suffix	
Salutation	
Role	Owner
Organisation	New Farm Local Bus Company
BH Phone	02 9486 3129
AH Phone	07 3309 5491
Mobile	0403 774 545
Fax	02 9486 3100
Email	helen1234@newfarmlocalbus.com.au
Web Address	
Notes	
Address	139 James Street NEW FARM QLD 4005 AUSTRALIA
Stakeholder Groups	Community Media Agriculture, fishery and forestry: Arts and recreation: Association: Business Partner Organisation Environmental
Distribution Lists	eNews Updates Self Manage Details eNews
Linked Projects	Kensington/Kingsford Landmark LNG Melbourne City Test Murray-Darling Rehabilitation New Farm Precinct New Farm Transit Lanes Yarra Ranges Trail Network <small>Note: 3 Linked Projects exist outside of your current project view</small>
Restricted to	All Projects (unrestricted)
Privacy Setting	0: No restriction

Events (30)

Event Type	Event Date
1800 Number	10 Jun 2016 2:05 PM
Meeting	26 May 2016 8:23 AM
1800 Number	20 May 2016 11:06 AM
EMAIL	15 May 2016 12:00 AM
Meeting	15 May 2016 12:00 AM

Actions (18)

Set By	Assigned To
White, Chelsea	White, Chelsea
White, Chelsea	White, Chelsea
White, Chelsea	White, Chelsea
Mabbott, Angie	Mabbott, Angie
White, Chelsea	Miller, Felicity

Properties (3)

Ownership	Property No	Address
owner	DP 48673	139 Jame
occupier	DP 48675	141 Jame
owner	DP 48677	143 Jame

Team Members (1)

Note: 1 item(s) exist outside of your current project view

It's important to note, if both original entries have different information stored in the details section (eg. phone number), the new entry will prioritise the information in the first entity you click when highlighting them.

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



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



Phone: 1300 850 058



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

User Terms and Conditions

It's important for everyone on your team to remember the basics so that your organisation and its data can remain protected and secure.

To that end it is vital that everyone remember to ensure that all information and files that are uploaded into CM:

1. Do not infringe the copyright of another person or organisation, and do not infringe any other industrial or intellectual property rights, or privacy rights, of another person or organisation
2. are not defamatory, offensive, or obscene
3. are not misleading or deceptive or likely to mislead or deceive
4. are not illegal.

Anyone who contravenes this is in breach of our terms and conditions.

It's also important to remember that anyone with access to your username and password may access your profile and your client information which is a breach of our terms and conditions.

Overview and System Architecture

Consultation Manager is a secure web-based application that runs on 64 bit Microsoft Windows Server 2008 R2 and 64 bit Microsoft SQL Server 2008. These technologies are industry-leading, Enterprise class applications and are capable of handling very high volumes of data quickly and securely.

All access to Consultation Manager is conducted via 128 bit Secure Sockets Layer (SSL) security, ensuring all data is encrypted in transit. Users access the system via unique username and password combinations.

MySite's servers are stored in a secure, climate-controlled facility and can only be accessed by authorised technical staff with photo identification. MySite's servers are firewalled and port access is tightly controlled by IP Address access lists.

All project data are stored in a database file unique to your Enterprise and this database file is backed up to disk every two hours. Database files, documents, application and system files are encrypted and backed up via SSL connections to offsite facilities to guard against major disasters, including complete loss of a server facility. MySite also runs daily backups of all data via tape. Tape backups are stored on-site for up to 7 days and offsite for one year.

MySite's servers rely on a robust, completely virtualized and high availability hardware environment. They are connected to the internet via high speed links

ensuring rapid application response. MySite's servers have a high level of redundancy including redundant Fibre Channel SAN, high availability, VMware virtualization hardware clustering including redundant power supplies, supplied by discrete feeds.

Databases are highly optimised for maximal performance and database queries are monitored to identify opportunities for further performance enhancements.

Wherever possible, data is exchanged using AJAX (Asynchronous Javascript and XML) technology and sophisticated caching routines, which act to minimise the volume of data being transferred over the web, significantly enhancing performance of the system.

Consultation Manager's availability is continually monitored locally and remotely giving you the added assurance that your application will be performing at its peak at all times.