

# **COURSE MANAGER**

**INSTRUCTION MANUAL FOR USERS**



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## Understanding Course Manager 2

Course Manager 2 (CM2) is the international database owned and operated by Simply Mobilizing International (SMI). It serves as a platform to house ALL of SMI's courses and resources and keeps a record of all SMI courses delivered across the world as well as account holders/users who have given their permission.

### Development Principles

The development of CM2 is based on the following principles:

#### Meeting Governing Franchise Practices and Policies

CM2 was designed to support and uphold the policies and practices of the SM Franchise as provided in the SM Operations Manuals, facilitating online access to SMI Courses and all accompanying resources. This means that access to the full functionality of the Course Manager system in the country is initially assigned to duly recognized New Nations Coordinator(s) at Level 1 and their designates. The NNC is therefore advised to take the initial step by contacting SMI ([globaldesk@simplymobilizing.com](mailto:globaldesk@simplymobilizing.com)) to arrange access to CM2.

The operation of the CM system is expected to be fully turned over from the NNC(s) to the National Coordinator(s) and their designates at Level 5 or at an appropriate time. The NC/NNCT then serves as the official SM Franchisee upon their endorsement and the eventual signing of the relevant agreement with SMI and now becomes fully responsible for the User Information and operation of the CM system within the country.

*Important:* The NNC/NNCT or the SM Franchisee, at any time, cannot assign the rights or the use of CM2 to another franchisee or organization.

CM2 can be used where there are no in-country leaders (NC/NNC), but User information can be accessed only by a Global Region Coordinator (GRC) or someone from the SM International Team (SMIT) for the purpose of facilitating development of the SM Movement within the country, until such time when an NNC or their designates is/are assigned for the country.

#### Meeting Privacy Laws

CM2 was designed to protect the privacy of personal information as agreed to by Account Holders/Users in the CM2 Terms and Conditions of Use. Although SMI is registered in the Philippines, efforts have been made to meet privacy laws for users in other jurisdictions.

The password requirements for CM2 meet current privacy laws. Where preferred, Two-Factor Authentication (TFA)<sup>1</sup> is also now available.

#### Supporting growth of the SM Movement across the world

CM2 was also designed to support the growth of the movement across the world by maintaining a record of all courses, resources and account user information for participants

<sup>1</sup> TFA is a subset of Multi-Factor Authentication (MFA) and adds a significant level of security to a User's Account.

who have given their permission. The System can provide SMI and Franchise Holders access to live data and summaries, facilitating communication within the movement, the reporting of Royalties and the growth of the movement.

## **How to use this Manual**

This Manual uses a combination of Screenshots and text.

Within the same page, words or phrases appearing in a different color refer to specific parts of the screenshot encircled or appearing in the same color. Otherwise, arrows are used to guide you to the specific step/aspects on the screenshot.

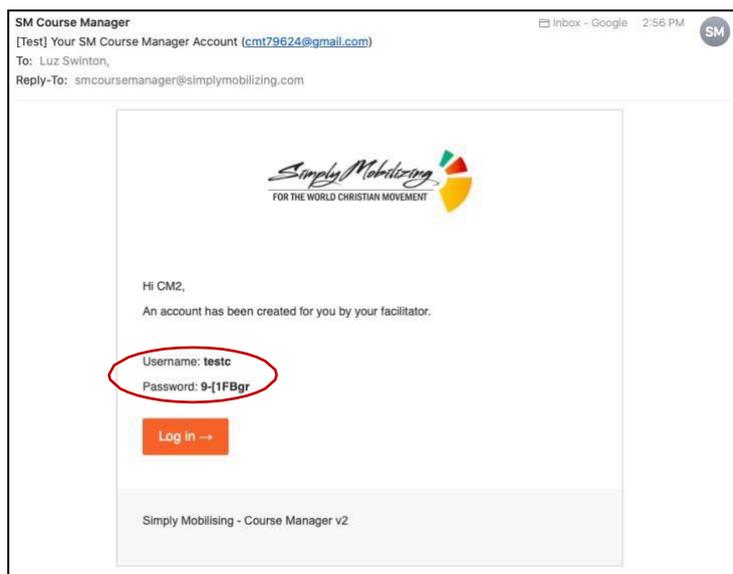
The significance of certain critical steps is highlighted under the question '**Why is this important?**' throughout the Manual.

## Part 1 - Managing your account

### Logging in to CM2

You will need a Username and Password to log-in.

Once you have paid for and completed an entry-level Simply Mobilizing (SM) course for which you were registered, the System ([smcoursemanager@simplymobilizing.com](mailto:smcoursemanager@simplymobilizing.com)) will send you an email containing both your Username and Password.

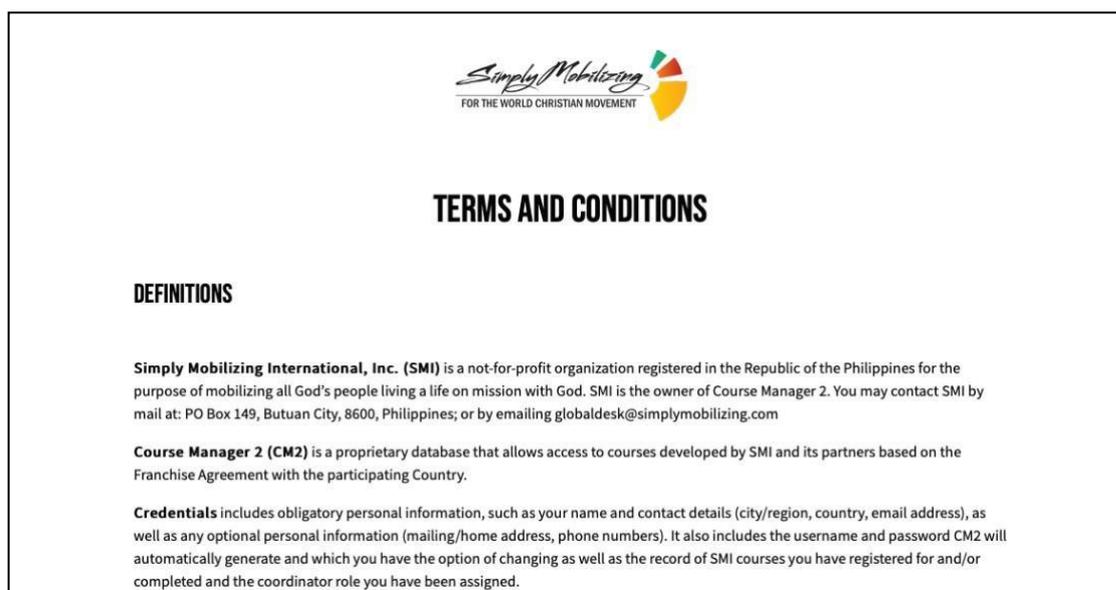


Use this **Username and Password** to log in to **Course Manager 2 (CM2)**. You can also use the email address you entered in your initial course registration as your Username.

Please check your junk/spam folder if you do not find this email in your inbox.

Bookmark this [Site](#) for future access on your Browser.

If logging in for the first time, you will need to agree to the Terms and Conditions.



(Required) I agree to the retention of my personal information in CM2 for the next 24 months or two (2) years.

(Required) I consent to the use of my personal information to
 

- Allow me to register and provide me access to other SMI courses as a participant.
- Provide me access to SMI course resources I will be helping to deliver.

I consent to the use of my personal information to (if security is an issue in the country where you serve, please do not tick this box.)
 

- Receive updates and invitations related to the SMI movement events in my country.
- Receive updates and invitations related to global SMI movement events forwarded by my country SMI coordinators.

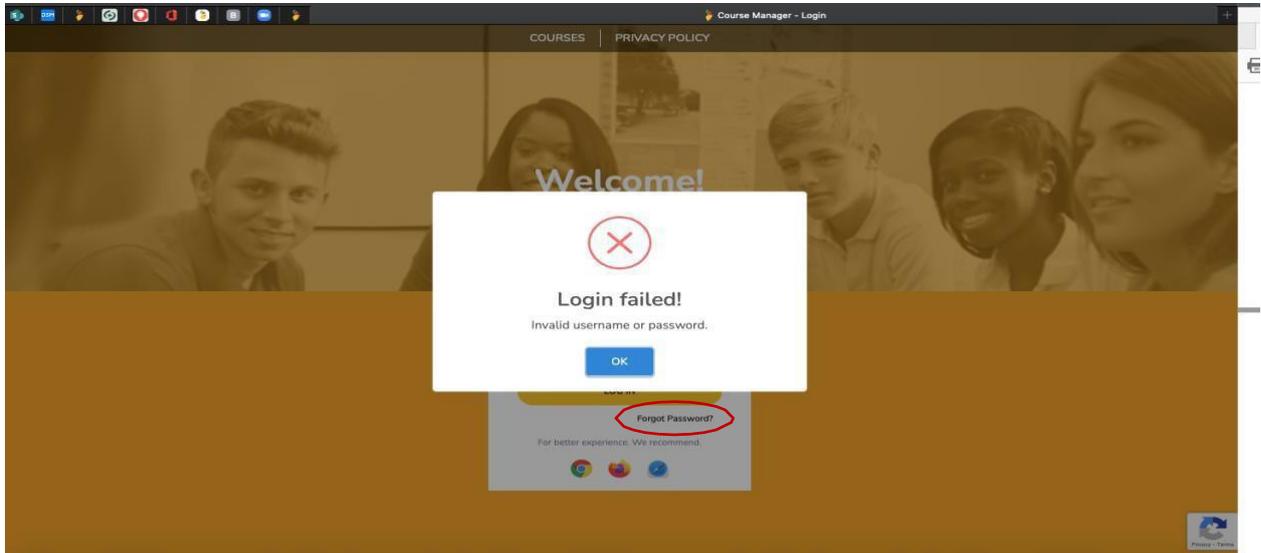
Ticking the **REQUIRED** boxes and 'Agreeing with the Terms and Conditions' will allow you to continue to access Course Manager 2 to participate in future courses.

## Log in issues

### Forgot username or password

If you are unable to log in using your CM2-generated Username, try using the email address you used to first register in a course. This is the email address that will be on record in your Profile.

If you have forgotten your password, click on **Forgot Password** and follow the instructions in the subsequent dialogue boxes.

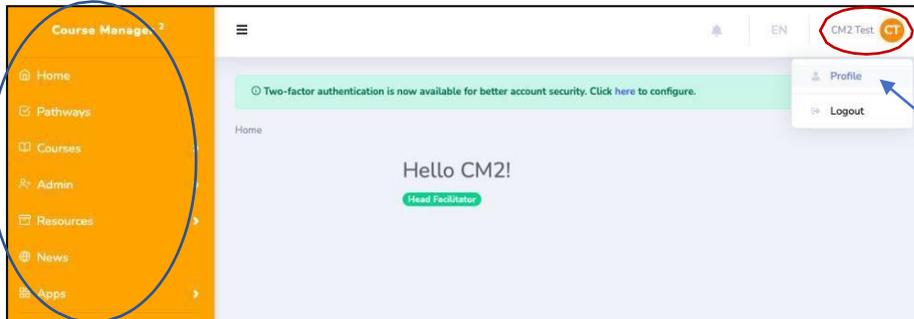


### Blocked accounts

Multiple failed attempts to log in will result in your account being blocked. Please contact [globaldesk@simplymobilizing.com](mailto:globaldesk@simplymobilizing.com) for help to unblock your account.

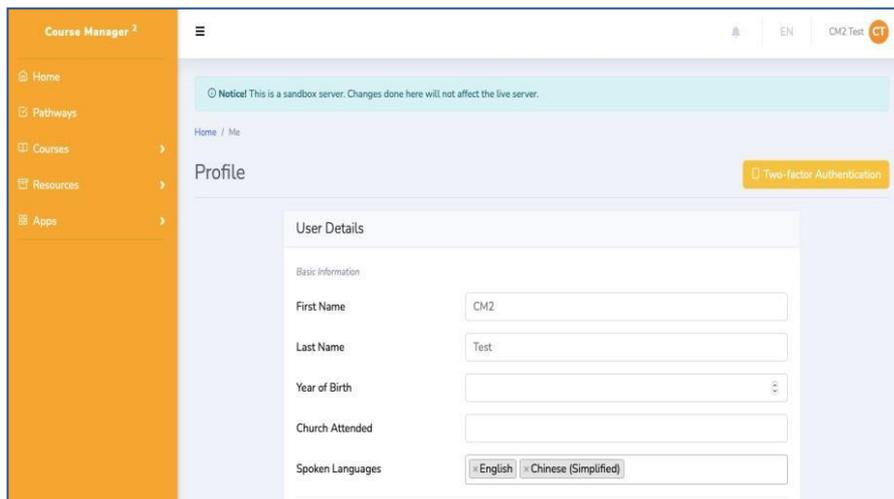
## Maintaining your Profile

In future, logging on to CM2 will take you to your personal Home Page showing your **name and initials** on the top right hand corner of the page and the **navigation pane** on the left side of the page.



Click on your **initials** at the upper right hand corner of the page to then select **Profile** to open your Profile Page.

As described in the Terms and Conditions, you are required to keep your Profile up to date. Ensure your Profile information is accurate:



- First Name
- Last Name
- Year of Birth
- Spoken Languages
- Nation – This refers to the country where you are involved with Simply Mobilizing, e.g. where you are taking courses, delivering courses (not necessarily your country of citizenship or residence).

If you took your SMI courses in Country A but moved to Country B and are now serving there and helping out with courses in that country, please make sure you update your Profile by changing Nation to reflect Country B.

### WHY IS THIS IMPORTANT?

Your information can only be accessed by the leadership in the Nation you identify. This allows them to invite you to register for courses and training or to join a facilitating team.

- State/Region/Province  
 – some countries set-up their information with specific States, Regions or Provinces included in a drop-down list. If there is a drop-down list for your Nation, please make the appropriate selection.

- Email address – please ensure this is current as it will be used for communication but can also be used as your Username.

- Always remember to **Save Profile Information** when making changes.

## Course Information

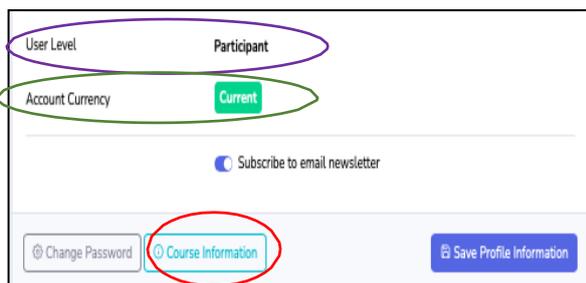
This is a listing of all the SM Courses.

It is important for you to ensure that all the courses you have taken are recorded in the system by adding the date (accurate to the year) when you completed the course.

### WHY IS THIS IMPORTANT?

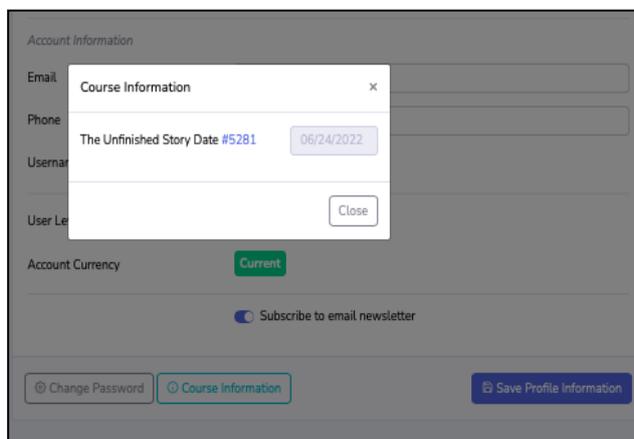
The dates signify that you have taken a course. Dates listed on this page determine your ability to Create a Course (any course for which you are qualified to create/deliver).

Make sure your Course Information (the record of your SM courses) is accurate. Clicking on **Course Information** will open up the course list.



The length of the list is determined by your **User Level**. If you have only completed entry level courses you are currently at a Participant Level. This list will be very short and show only the courses you have completed as recorded in CM2. A longer list is available only if you have a higher user level (anything other than Participant).

Your Profile also shows your **Account Currency** (your currency within the System). The Simply Mobilizing Franchise recognizes anyone who has participated in any SM event in any capacity within the past twelve (12) months as 'current'. This serves as a reminder for compliance but does not prevent access to CM2 functions.



The User Level also determines what you are able to access in CM2 and is automatically set by the system based on the SM courses you have completed that are recorded in the system.

The list of Courses in the Course Information window for someone at a Participant Level is quite short and includes only the entry-level courses the User has completed.

Year of	Procedural Training (ETC) Date	mm/dd/yyyy
Church	Procedural Training (ETI) Date	08/20/2021
Spoken	Procedural Training (Interface) Date #4425	12/18/2020
Address	Procedural Training (Mobi101) Date	04/14/2021
Nation	Procedural Training (SOM) Date	mm/dd/yyyy
State /	Procedural Training (TSB) Date	mm/dd/yyyy
Street	Procedural Training (TUS) Date	08/20/2021
Region	Procedural Training (TUS-Youth) Date	mm/dd/yyyy
Postal C	Revealing His Glory Date	mm/dd/yyyy
Account	River Module Date	mm/dd/yyyy
Email	Supporting Translation Teams Date	mm/dd/yyyy
Phone	The Unfinished Story Date	08/18/2017
Username	Timeline Workshop Date	mm/dd/yyyy
User Le	Training of Mobilizers (Interface) Date	12/01/2020
Account	Training of Mobilizers (MobiologyWS) Date	08/24/2021
	Training of Mobilizers (TSB) Date	01/20/2021
	Training of Trainers Date	mm/dd/yyyy
	TUS for Youth Date	mm/dd/yyyy
Delete	Upskilling Date #4916	11/12/2021
Once ye	Youth Kairos Date	mm/dd/yyyy
Delete		
	Close	Update Course Information

If you have had a long history with Simply Mobilizing, you will have a User Level that will give you access to the full list of SM Courses.

During the transition from CM1 to CM2 and until CM2 records are completely updated, a manual override allows you to add course dates that are missing from your list. Check and make sure ALL the courses you have completed have corresponding dates.

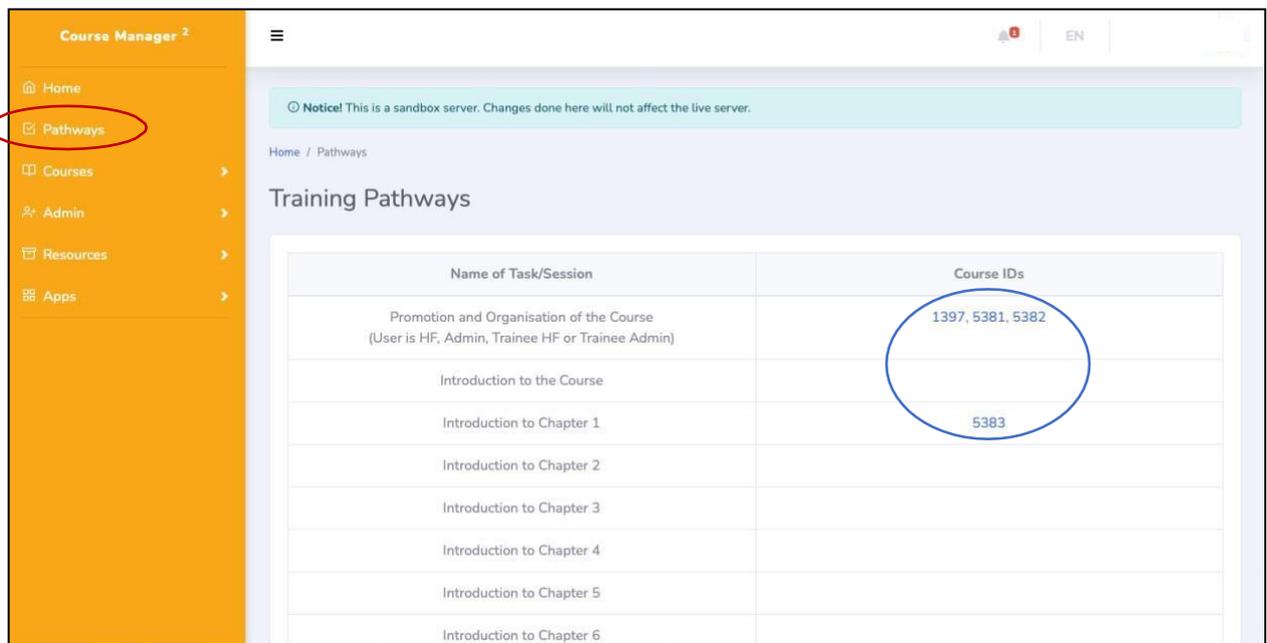
To add a completion date, simply type in a date following the date format in the cell. Accuracy of dates are only required to the YEAR level! So, if you do not remember the exact dates of completion, record 01/01/YEAR.

Always remember to save the dates you have added by clicking on **Update Course Information**

## Pathways

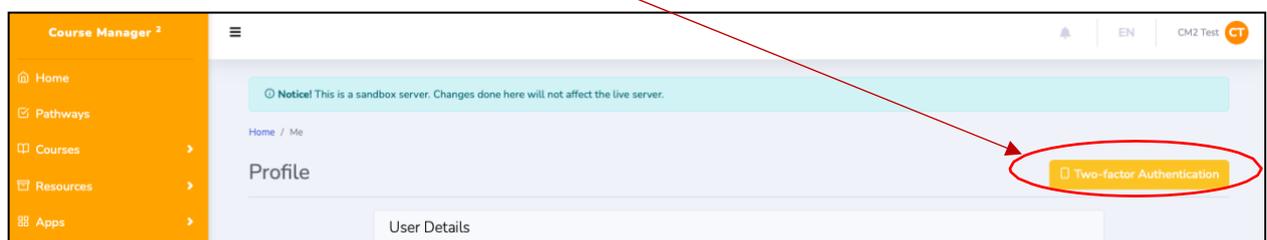
In future, Pathways<sup>2</sup> will refer you to a summary of your participation and experiences in delivering SM courses.

Currently, by clicking on **Pathways** on the Navigation Pane, you will find a record of the components you have delivered in previous Kairos Courses. Whenever you participate in delivering a Kairos Course, a record of your participation in delivering specific portions/components (Introduction, Devotion, etc.) is made by the addition of the **Course Number** next to the specific portion/component.



## Security and Privacy

For increased security, you have the option of enabling Two-Factor Authentication (TFA) for your account by clicking on this button on your Profile Page. You will need a separate Mobile Device to complete this.



Simply follow the instructions in the dialogue boxes as they appear or refer to Appendix 1 for the overview of the instructions.

<sup>2</sup>Pathways refers to the sequence of courses and training required to create and deliver various courses. For Kairos Course, it can include the record of the experiences/history of course components the user has delivered.

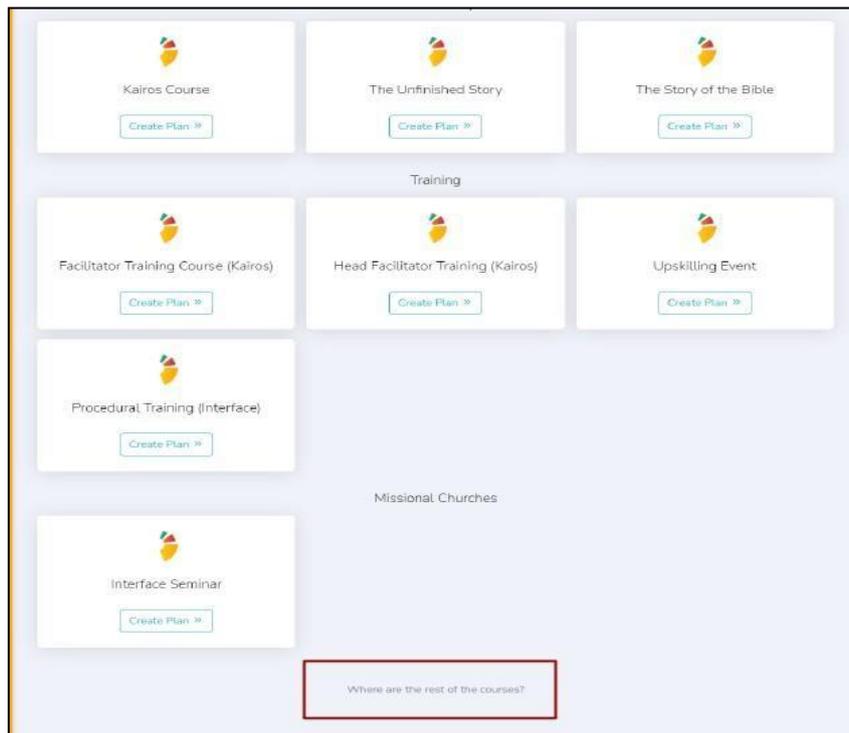
## Part 2 - Creating and managing courses

### Courses/Create New Course

What gives you access to Create a specific course?

To Create a Course, you should have completed all the pre-requisite courses and training required for that course.

If a course you expect to be able to create does not appear on your 'Create New Course' page, click on '**Where are the rest of the courses?**' at the bottom of the page.



This will produce a list **specific to you** (the User who is logged in) specifying what courses you are missing, preventing you from creating that course. If you have already taken the listed course(s), go to your *Profile/Course Information* and add the dates when you took the course(s) (accurate to the year). Don't forget to click on 'Update Course Information' after entering dates.

NOTE: Until CM2's data repository has been fully updated for most countries and users, an override has been provided that allows the User to update their own Course Information with dates of courses they have completed (accurate to the year), if the course record has not been updated in CM2. If you are unable to do this, your Coordinator (NC/NNC/Regional Coordinator) should be able to help you.

#### WHY IS THIS IMPORTANT?

You will **not** be able to create a course unless all pre-requisite courses and training are documented either by the course itself being recorded in CM2 or by manually adding the date when you took the course to your Profile/Course Information.

## Creating a Plan - Kairos Course

Only an Accredited HF can Create a Kairos Course.

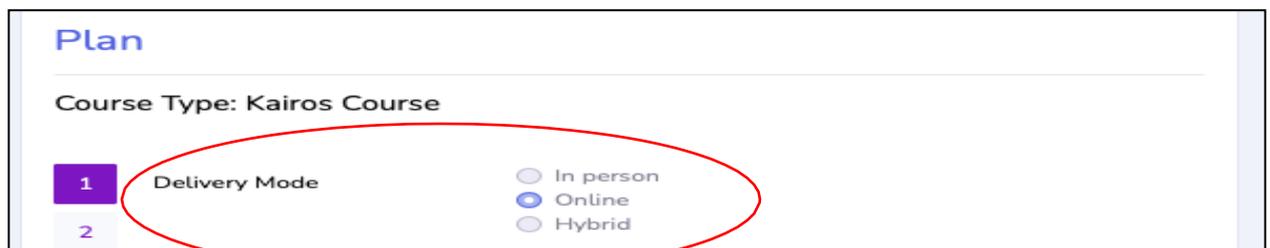
### PLAN

On the 'PLAN' tab, there are six (6) pages of questions. Answer as many as possible.

**WHY IS THIS IMPORTANT?** This will help the approving coordinator better understand how the course fits into your Nation's mobilization strategy and will be the basis for approving the course or for requesting more information.

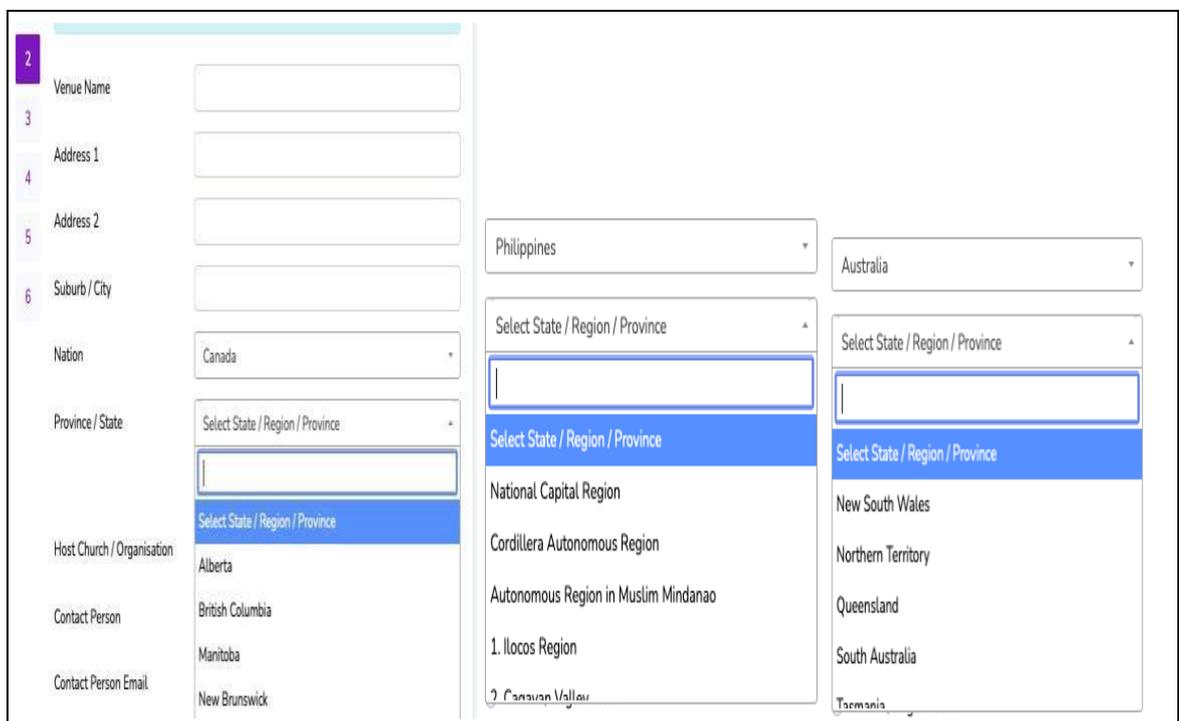
Don't forget the following:

- Page 1 – specify the **Delivery Mode**. This information is included in the Advertising and is used in sorting courses. Hybrid courses combine the experience and benefits of Online and In person courses.



The screenshot shows the 'Plan' page for a 'Kairos Course'. The 'Delivery Mode' section is highlighted with a red oval. It includes three radio button options: 'In person', 'Online', and 'Hybrid'. The 'Online' option is selected.

- Page 2 – select the State/Region/Province as they appear on the dropdown. This will also help to establish the Time Zone important in Online Courses. NOT ALL countries have a drop down-list.



The screenshot shows the 'Plan' page for a 'Kairos Course' with various form fields. The 'Nation' field is set to 'Canada'. The 'Province / State' field is open, showing a dropdown list of Canadian provinces and territories: Alberta, British Columbia, Manitoba, and New Brunswick. The 'Host Church / Organisation' field is set to 'Alberta'. The 'Contact Person' field is set to 'British Columbia'. The 'Contact Person Email' field is set to 'Manitoba'. The 'Venue Name' field is empty. The 'Address 1' field is empty. The 'Address 2' field is empty. The 'Suburb / City' field is empty. The 'Philippines' dropdown is open, showing a list of regions: National Capital Region, Cordillera Autonomous Region, Autonomous Region in Muslim Mindanao, 1. Ilocos Region, and 2. Canadian Valley. The 'Australia' dropdown is open, showing a list of states and territories: New South Wales, Northern Territory, Queensland, South Australia, and Tasmania.

- Page 3 – list all the Facilitators you have invited. When inviting a Mobilizer who is not registered under your country, request your NC/NNC to invite them as a ‘Visiting Facilitator/HF’.

You will note that you are **automatically assigned as the ‘Overseeing Accredited HF’** on this page.

If you are creating this course for **another HF**, you can tick the box assigning them the role **once you have added them to your Team**. You will have a chance to ‘re-define’ roles in the Team tab, after the course is approved.

Click on **Submit for Approval** when ready. You may close out and log out of CM2 without submitting your course for approval. Use the **Course Plan Number** to retrieve your course when you go back to complete the plan and Submit it for Approval.

To retrieve the Plan and complete it, go to **Courses/All Courses/Plans Not Submitted**. Enter the **Course Plan Number** in the Search Box and click on the Plan Number. This will open up the Plan so you can complete it and submit for approval.

Ensure you have accurate information in the Plan before Submitting for Approval.

### WHY IS THIS IMPORTANT?

You cannot change any of the parameters as specified in the plan once it has been approved. As long as you have not submitted your plan for approval, you have an opportunity to change the plan or Delete it. Once your plan has been approved, however, you can only Delete a plan by selecting ‘Cancel Event’ on the Publicize Tab. (See next page for Figure.)

## PUBLICIZE

Once the course is Approved, you should be able to publicize the Course on the Website or Print a Poster or Flyer by entering additional required information in the **Publicise Tab**.

Event #5383: Kairos Change Course Type

Plan **Publicise** Team Components Runsheets Registration Attendance Finance Report

**Publicise** Cancel Event

Event Title: Kairos

Course Type: Kairos

Start Date: Aug 3, 2022

End Date:

Nation: Canada

State / Region / Province: Alberta

\*Adding a state is recommended for English-only courses. Alberta

Timezone: America/Toronto

Languages: English

Notify event managers of online registrations

If you wish to be notified of online registrations via email, remember to tick this button.

Please note that Basic Information would already be carried over to this page from your Plan.

- Complete all required information on this page.
- Remember to specify State/Region/Province if applicable (with dropdown).
- Specify the **Time Zone**. This is especially important for Online Courses.

Publicise Cancel Event

Event Title: Kairos

Course Type: Kairos

Start Date:

End Date:

Nation: Canada

State / Region / Province: Alberta

\*Adding a state is recommended for English-only courses.

Timezone: **America/Edmonton**

Languages:

Blurb:

Select timezone

- America/Dominica
- America/Edmonton
- America/Eirunepi
- America/EL\_Salvador
- America/Fort\_Nelson
- America/Guatemala
- Asia/Magadan
- Asia/Makassar
- Asia/Manila
- Asia/Muscat
- Asia/Nicosia

- To activate ONLINE REGISTRATION, remember to tick 'Online' in the To Register Section.
- Unless specified, the registration deadline will default to the course Start Date at 12:30 p.m. on that time zone.
- If you wish to send a personal email to confirm registrations, click on the toggle button 'Confirm by email'. Remember that this WILL NOT trigger an automated email, but will only let the registrant know that their registration will be confirmed by an email from the HF/Course Admin.
- Why is this important? This is one way of declining registrations if you have exceeded your maximum registrations or if you must cancel a course.
- To advertize the course on the web, select 'Publicize Event on Website' at the bottom of the page.

The screenshot shows the 'To Register' section of a course management interface. At the top, there is a yellow warning box stating: "This course event is not yet published. When ready, click the 'Publicise Event on Website' below to publish." Below this, there are three radio button options: 'Online' (circled in red), 'Email', and 'Contact'. The 'Online' option is selected. Below these are input fields for 'Email' and 'Contact'. The 'Registration Deadline' section is circled in green, showing a 'Date' field and a 'Time' field set to '12:30 PM'. Below the time field, it says "Standard or Daylight Saving is automatically detected based on the date and time set." At the bottom, there is a 'Confirm by email' toggle (circled in blue) which is currently turned off. Below the toggle, it says: "This does not trigger an automated email. Yes inserts 'Registrations will be confirmed by email' - indicating that the HF will confirm registration by emailing the registrant."

The screenshot shows three panels: 'Web Advert', 'Flyer', and 'Poster'. Each panel has a 'Text Size' dropdown menu set to 'Extra Small'. Below each panel is a 'Preview' button and a 'Download' button. In the 'Web Advert' panel, the 'Publicise Event on Website' button is circled in yellow.

NOTE: Any changes made to the Publicise Page before the registration deadline will be reflected on the web advertisement.

## ESTABLISHING YOUR TEAM

Add Facilitators to the team on the TEAM page.

Home / Events / Edit

### Event #5383: Kairos

Change Course Type >

Plan Publicise **Team** Components Runsheets Registration Attendance Finance Report

#### Team

To add Facilitators, begin typing name or username and select from available users. If not available, contact your NC/NNC

Type a name or username to search for a facilitator:

Facilitator	Location	Event Manager <span>New</span>		
Luchie Swinton	Alberta / Canada	Yes - HF (Primary)		
Donna	Alberta / Canada	<ul style="list-style-type: none"><li>✓ No</li><li>Yes - HF (Primary)</li><li>Yes - HF</li><li>Yes - Trainee HF</li><li>Yes - Administrator</li><li>Yes - Trainee Admin</li><li>Yes - Technical Support</li><li>Yes - Supervising HF</li></ul>		
Jason	Sri Lanka			

Contact your NC/NNC to invite Out-of-country facilitators to the team. They can invite a visiting Facilitator or Head Facilitator to your course.

Assign the different team roles on this page as needed by using the drop-down list:

- Administrator
- Primary HF
- HF
- Supervising HF (HF supervising any trainees if different from Primary HF and HF)
- Trainee HF
- Trainee Administrator
- Technical Support

All Facilitators will have access to Online Resources for that course as soon as they have been added to a Facilitating Team, for the duration of that course.

For the Kairos Course, a [Facilitator's Kairos Pathway](#) can help the HF in determining what components to assign to them with the goal of helping them build their Facilitating skills. To access this pathway, click on the **green book icon** to the right of the Facilitator's name. Use the **red person with and X icon** to delete a Facilitator from the Team list.

## COMPONENTS

Required **Components** are NOT LISTED on this page. However, in some sessions, there is a choice of video or devotion that can be used. The video or devotion you choose on this page will be included in the Runsheet.

You may choose to add a Session 0, at the beginning (For providing training on use of Zoom, etc, if needed) and/or a separate Closing/Graduation Session at the end.

Remember that attendance in these sessions is not required for course completion.

An option to **Customize Components** is available if there is no existing template for the course, or if there is a need to make changes to contextualize the course.

### Event #5383: Kairos

Change Course Type ✕

Plan Publicise Team **Components** Runsheets Registration Attendance Finance Report

## Components

**Important!** For Kairos Course, progress is measured by the number of attended sessions. Setting Session 0 or Closing/Graduation Session to Yes, or Customizing the Components will not affect the Attendance tab.

In some sessions there is a choice of devotion or video to be used. Select the components to appear on the run sheets

Session 0	No
	<small>Existing format or template may already have a Session 0 in it. Check first before setting this to Yes.</small>
Session 4 Devotion	"Abraham" Devotion
Session 5 Devotion	"Prayer" Devotion
Session 5 Video	
Session 8 Video	
Session 9 Format	
Closing/Graduation Session	Yes
	<small>Existing format or template may already have a Closing/Graduation Session in it. Check first before setting this to Yes.</small>

[Customize Components](#)

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## RUNSHEETS

This page is used to assign specific sections/components to facilitators as well as to arrange the sequence of sections/components to best fit the schedule.

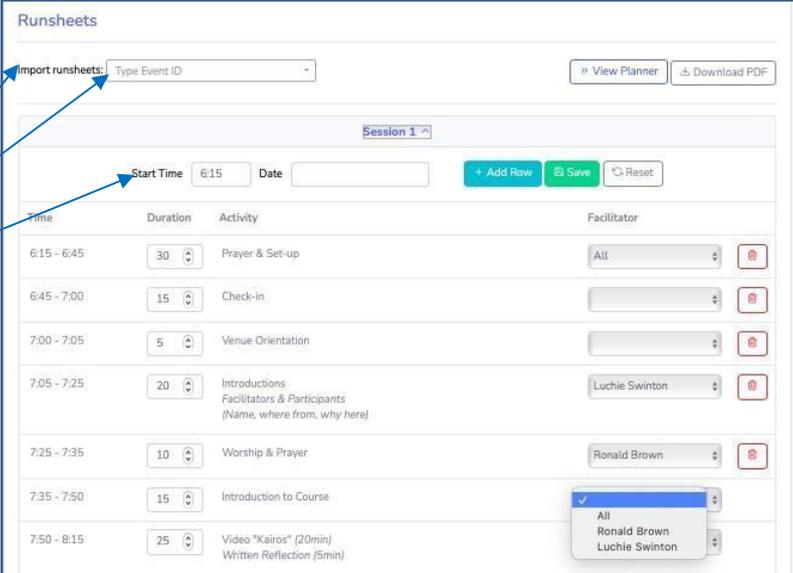
### WHY IS THIS IMPORTANT?

Remember that any section(s)/component(s) specifically assigned to a Facilitator will become part of that Facilitator's record and assist in maintaining their currency.

If you have a preferred sequence/arrangement of sessions you have used previously, you will be able to re-create that by 'Importing that Runsheet' (Type Event/Course Number into cell provided.)

By setting the start time, the rest of the schedule automatically falls into place.

Each Session is easily customizable by adding a Row. This will be created at the bottom of the page but can be moved up to where you want it.

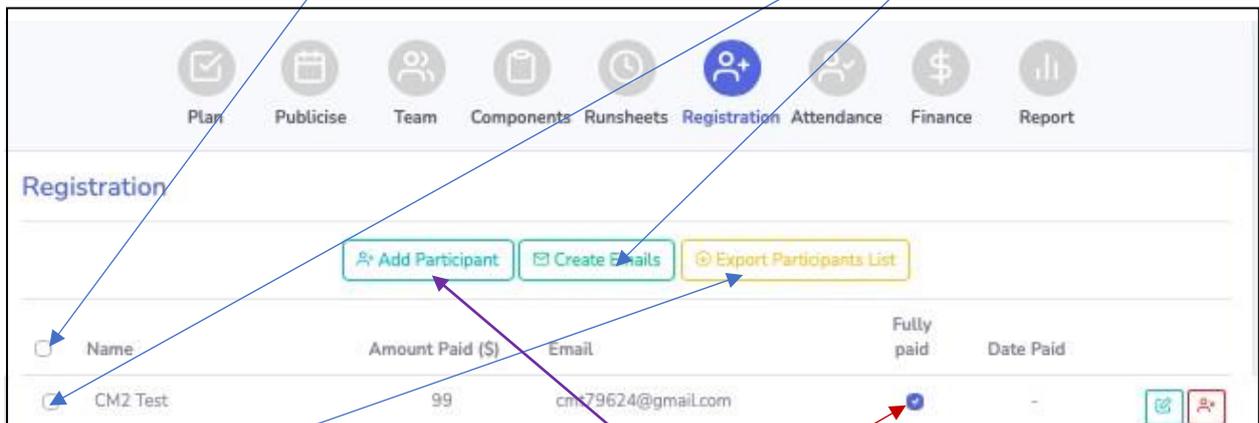


The screenshot shows the 'Runsheets' interface. At the top, there is a header 'Runsheets' and a search bar labeled 'Import runsheets: Type Event ID'. To the right are buttons for 'View Planner' and 'Download PDF'. Below this is a section for 'Session 1' with a 'Start Time' dropdown set to '6:15' and a 'Date' input field. There are buttons for '+ Add Row', 'Save', and 'Reset'. The main part of the interface is a table with the following columns: Time, Duration, Activity, and Facilitator. The table contains several rows of session data. The last row has a dropdown menu open for the Facilitator column, showing options: 'All', 'Ronald Brown', and 'Luchie Swinton'. The 'All' option is selected.

Time	Duration	Activity	Facilitator
6:15 - 6:45	30	Prayer & Set-up	All
6:45 - 7:00	15	Check-in	
7:00 - 7:05	5	Venue Orientation	
7:05 - 7:25	20	Introductions Facilitators & Participants (Name, where from, why here)	Luchie Swinton
7:25 - 7:35	10	Worship & Prayer	Ronald Brown
7:35 - 7:50	15	Introduction to Course	All
7:50 - 8:15	25	Video "Kairos" (20min) Written Reflection (5min)	All

## REGISTRATION

This page provides a list of Facilitators as well as registered participants. You may send individual or group emails through the system (Emails will be sent by [smcoursemanager@simplymobilizing.com](mailto:smcoursemanager@simplymobilizing.com)) by ticking the box to the left of the participant's or facilitator's name and selecting 'Create emails'. You can send an email to ALL the participants by ticking the box to the left of the NAME heading.



addresses to facilitate mailing of materials where applicable.

Whether you manage payment manually or through a payment system linked to Course Manager, you need to ensure the Fully Paid box is ticked if the participant has paid.

### WHY IS THIS IMPORTANT?

Confirmed payment is required for delivery of the eReader and is one of the requirements for course completion.

You may also register a participant yourself by selecting 'Add Participant' and filling in the registration page, including selecting a hard or soft copy of the Reader. If adding or registering a participant yourself, ensure that you are not duplicating an existing account by using the correct registration tab ([Add New Participant](#) or [Search Existing User](#)).

## ATTENDANCE

This page will list all Registered Participants. The participant's last name and initial enclosed in parenthesis under their Full Name is their Username in CM2. (Although this is the usual convention for assigning Usernames, this will vary if there are duplicates.) Its presence indicates that the participant already has a CM2 account from having taken other SM courses previously.

Name ?	Reader Issued	Attendance									Worksheets									Completed	FTC	Newsletter
		1	2	3	4	5	6	7	8	9	1	2	3	4	5	6	7	8	9	?	?	?
CM2 Test (testc)	en																					

Tick the box under Reader Issued en (English) as appropriate.

Tick the participant's attendance for each session and each submitted worksheet if using hard copy worksheets.

If using Electronic Worksheets, the system will automatically tick the appropriate box when a participant submits a worksheet electronically and the same has been reviewed and returned by an assigned facilitator. (See Appendix 2 - Electronic Worksheets to see how this works) Remember to:

- Tick the 'Completed' box if the participant is deemed to have completed the course. **WHY IS THIS IMPORTANT?** This will allow you to print a certificate for the participant. This also triggers this course being recorded/added to the participant's profile.
- Tick 'FTC' if you deem this participant as having potential to become a Facilitator. **WHY IS THIS IMPORTANT?** It communicates this recommendation to FTC organizers in the future.

Ticking 'Newsletter' will trigger their receiving any mass communications/newsletters from SMI or your local SM organization. This may be an issue if the participant is serving in a closed access country or where security may be an issue. The participant may override this when they log in and agree to the Terms and Conditions of Use.

## FINANCE

The HF should complete the Finance Page.

Any automatic calculations generated is using information the Country has entered regarding Course fees and NCT portion in the Country Information Page as well as registration receipts. If needed, an invoice can be generated using the information on this page. A soft copy Invoice can also be emailed when appropriate.

Home / Events / Edit

### Event #5383: Kairos

Change Course Type ↗

Plan Publicise Team Components Runsheets Registration Attendance **Finance** Report

#### Finance

Fees Collected By

Church / Organisation  Head Facilitator

#### Invoice

Invoice Date: Jul 26, 2022

Paid Date:

## REPORT

Some of the information on this page will be automatically generated from the previous pages. You may add photos by [Choosing from your Files](#) and [Uploading](#) it to the system. Complete the rest of the report and **SUBMIT**. The system will generate a notice to the appropriate coordinator.

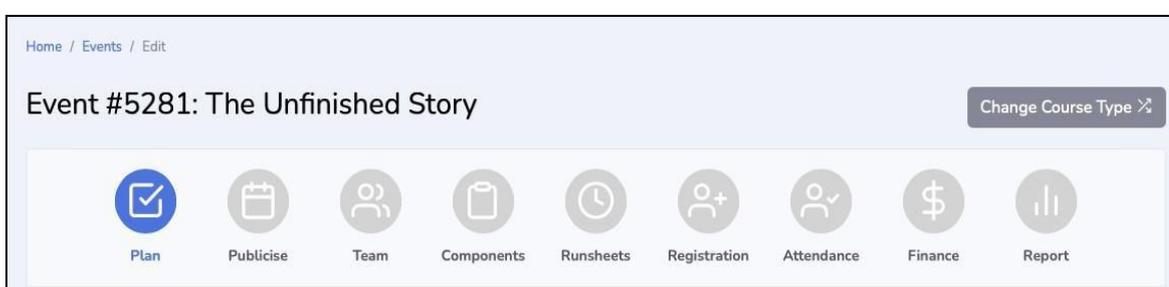
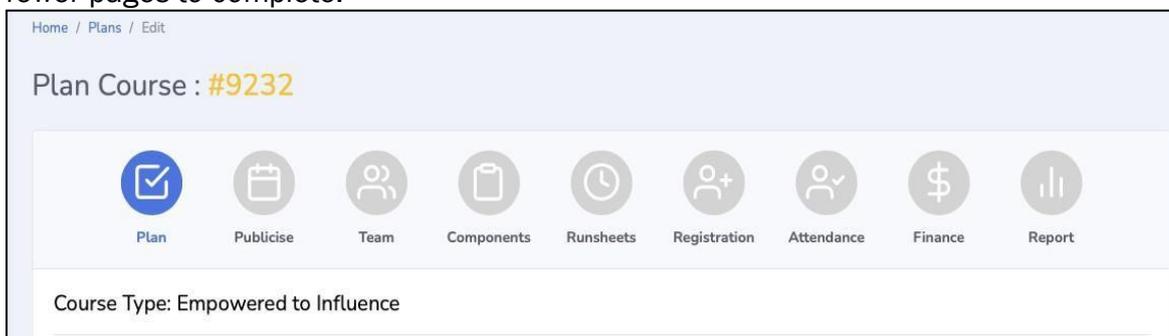
The screenshot displays the 'Event #5383: Kairos' report page. At the top, there is a navigation bar with 'Home / Events / Edit' and a 'Change Course Type' button. Below this is a menu of icons for various report sections: Plan, Publicise, Team, Components, Runsheets, Registration, Attendance, Finance, and Report. The 'Report' section is active, showing 'Event Details' with fields for Course Description (Kairos), Course Type (Kairos), Date (Aug 3, 2022), Nation (Canada), Language (English), and Location (Alberta). Below the details are several text input fields for 'HF Report' sections: General Comments, Highlights, Concerns / Improvements, Participant Quotes, and Comments for NCT action (e.g. concerns, errors). At the bottom, there is a 'Choose file' button, a 'Browse' button, and an 'Upload' button. A prominent blue button labeled 'Submit Report to Coordinators' is located at the bottom center of the page.

If you have missed anything after submitting the report, contact your Coordinator with a request to Reopen the report for Editing. You can then edit it and re-submit.

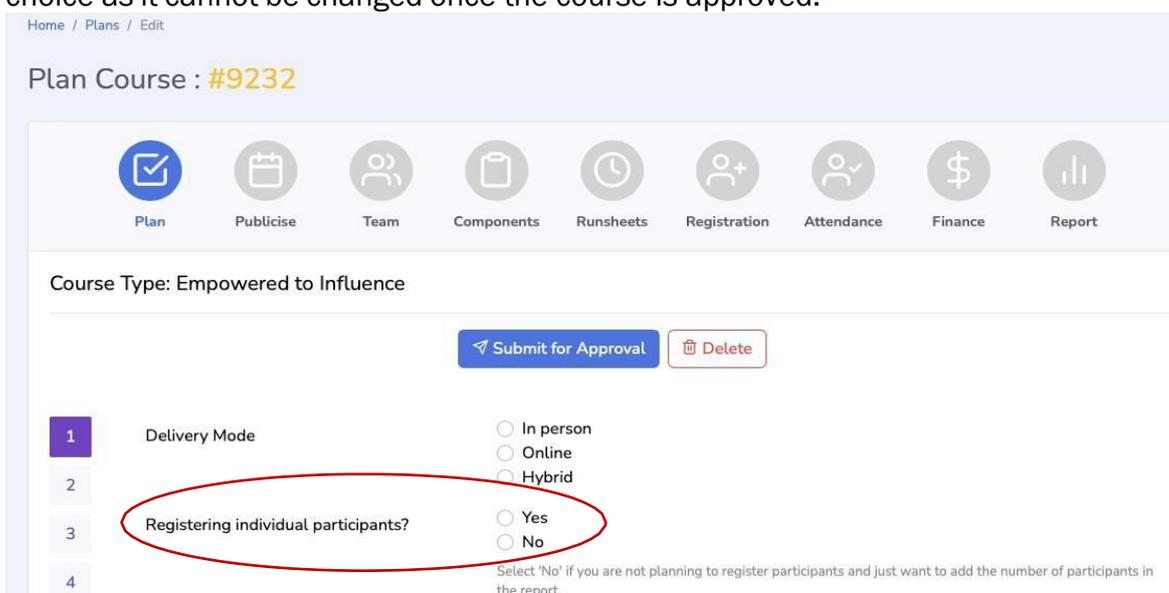
## Creating and Managing other courses

The same Tabs are used in Creating and Managing other courses. Here are some differences:

- Questions asked in the Plan Tab may be different or fewer resulting in fewer pages to complete.



- In TUS and ETI, you have the option of **Registering individual participants** or NOT. Churches using ETI and TUS in small groups are not required to register individual participants. Make sure to indicate the appropriate choice as it cannot be changed once the course is approved.



### Why is this important?

When you opt NOT to register individual participants, you will not have access to the Publicise Tab. It is assumed you are not advertising the course nor expecting individuals to register individually. The Registration and Attendance Tabs will also be blank as they will not be relevant.

- Your options for paying for the course are different and you will have access to an **Invoice** that you can **Preview, Print or Send**.

The screenshot displays the 'Event #5388: Empowered to Influence' interface. At the top, there is a navigation bar with icons for Plan, Publicise, Team, Components, Runsheets, Registration, Attendance, Finance, and Report. The 'Finance' tab is selected. Below the navigation bar, there is a section for 'Fees Collected By' with two radio buttons: 'Church / Organisation' and 'Church Coordinator'. Below this, there is an 'Invoice' section with 'Invoice Date' set to 'Aug 25, 2022' and 'Paid Date' as an empty field. At the bottom of the invoice section, three buttons are circled in red: 'Preview Invoice', 'Print Invoice', and 'Send Invoice'.

- There may not be a specific template for that course in the Components Tab but you continue to have the option of 'Customizing Components'. This allows you to add a template or adapt a template to your context.

No matter the course, a Plan must be submitted for an appropriate coordinator or mobilizer to review and approve and to ensure there is a record of it in the CM2.

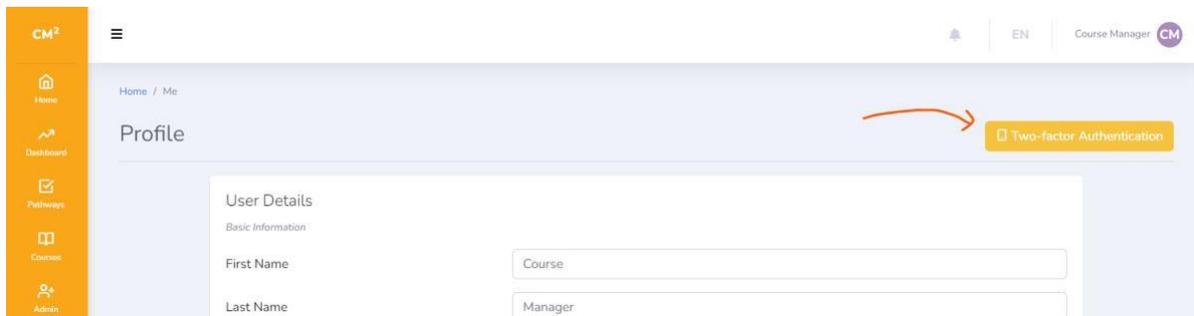
# Appendix 1: Two-factor Authentication

## Setup

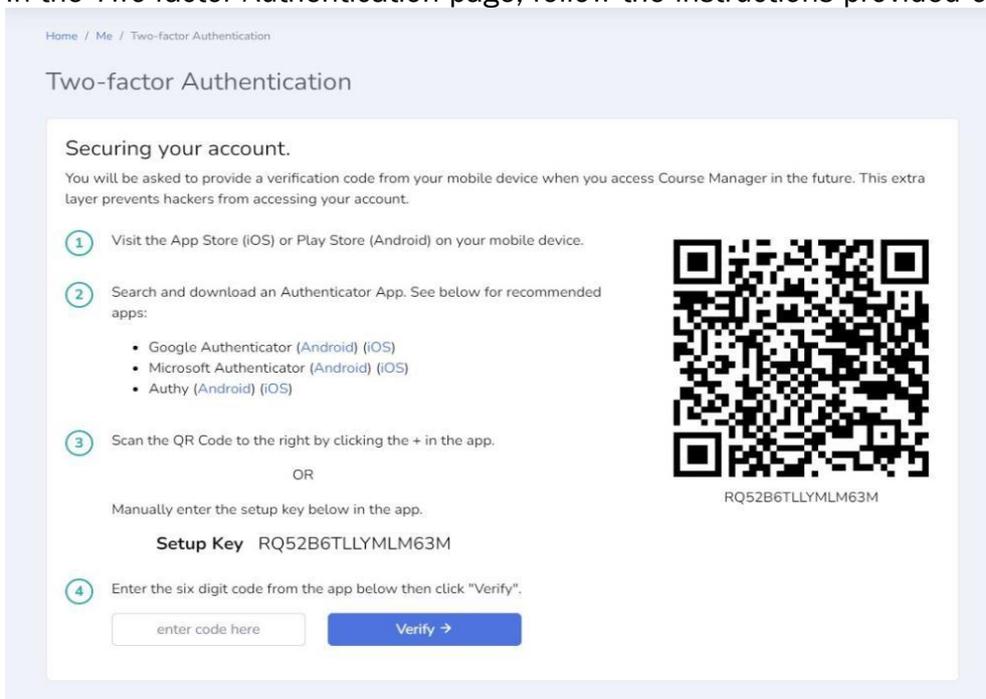
To enable Two-factor authentication, click on the name at the top right, then click on “Profile”.



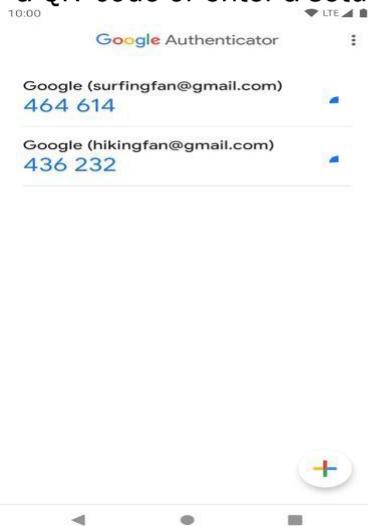
Then click the “Two-factor Authentication” button on the right side of the screen.



In the Two-factor Authentication page, follow the instructions provided on how to configure

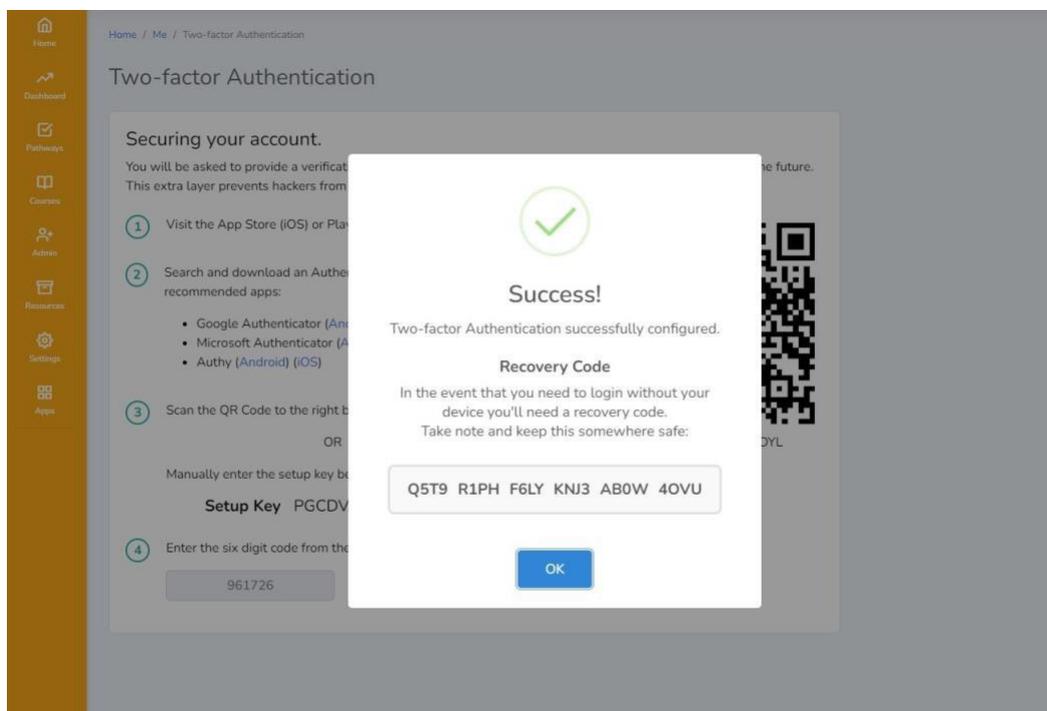


Below is an example of how it looks in Google Authenticator. Click the + button to Scan a QR code or enter a setup key.



## Setup Success

Upon successful registration, a **Recovery Code** is given to the user. The recovery code can be used if the user does not have his/her device or is otherwise temporarily unable to use the normal 2FA process, the user can log in by entering this code after their username and password. If a recovery code is used, a new recovery code will be provided at that time.



The user will also see a green notice that says, “Good job”.

Home / Me / Two-factor Authentication

## Two-factor Authentication

🔔 **Good job!** Two-factor Authentication is enabled on your account.

### Securing your account.

You will be asked to provide a verification code from your mobile device when you access Course Manager in the future. This extra layer prevents hackers from accessing your account.

- 1 Visit the App Store (iOS) or Play Store (Android) on your mobile device.
- 2 Search and download an Authenticator App. See below for recommended apps:
  - Google Authenticator (Android) (iOS)
  - Microsoft Authenticator (Android) (iOS)
  - Authy (Android) (iOS)
- 3 Scan the QR Code to the right by clicking the + in the app.

OR

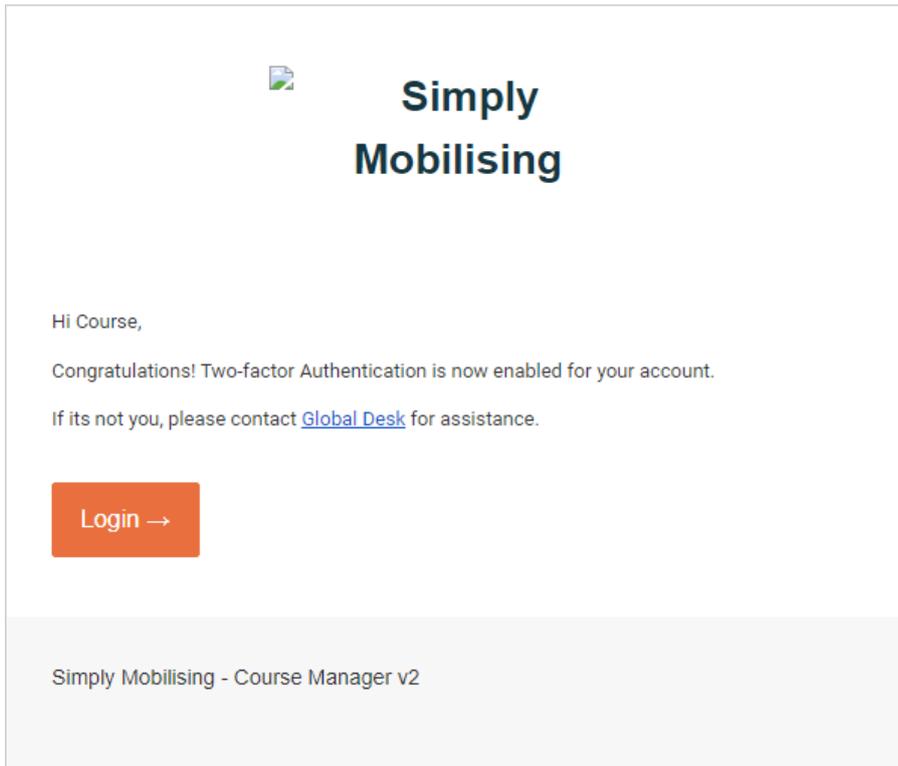
Manually enter the setup key below in the app.

**Setup Key** MUG3YL2JYK6LACTU
- 4 Enter the six digit code from the app below then click "Verify".

enter code here

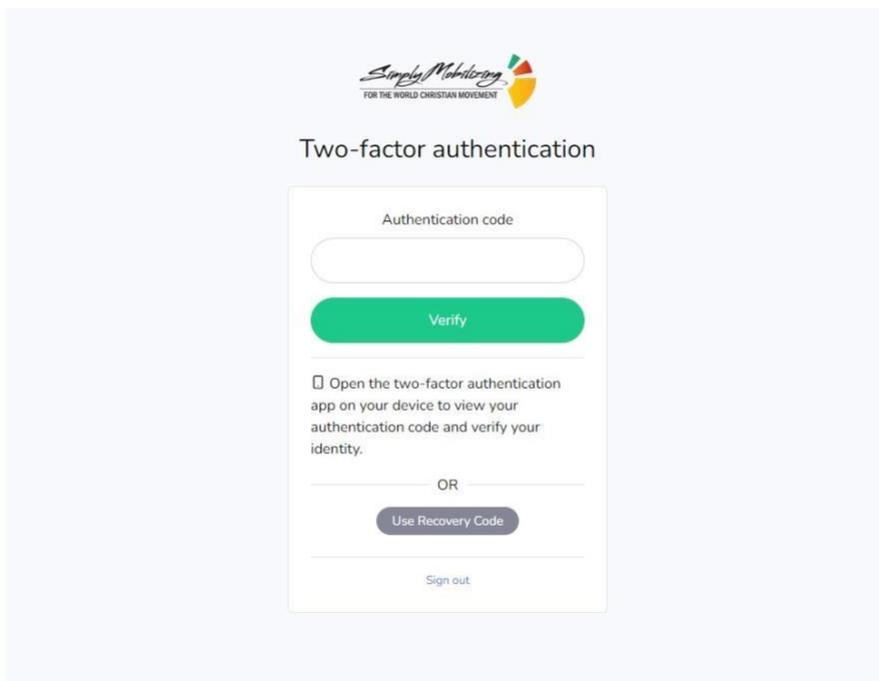
🔔 Click the button below to disable TFA

The user will also get an email notification that Two-factor Authentication has been set up for your account. This email also serves to inform the user in case another malicious actor is trying to steal their account. In case this happens, they should contact [globaldesk@simplymobilizing.com](mailto:globaldesk@simplymobilizing.com) right away.



## Login

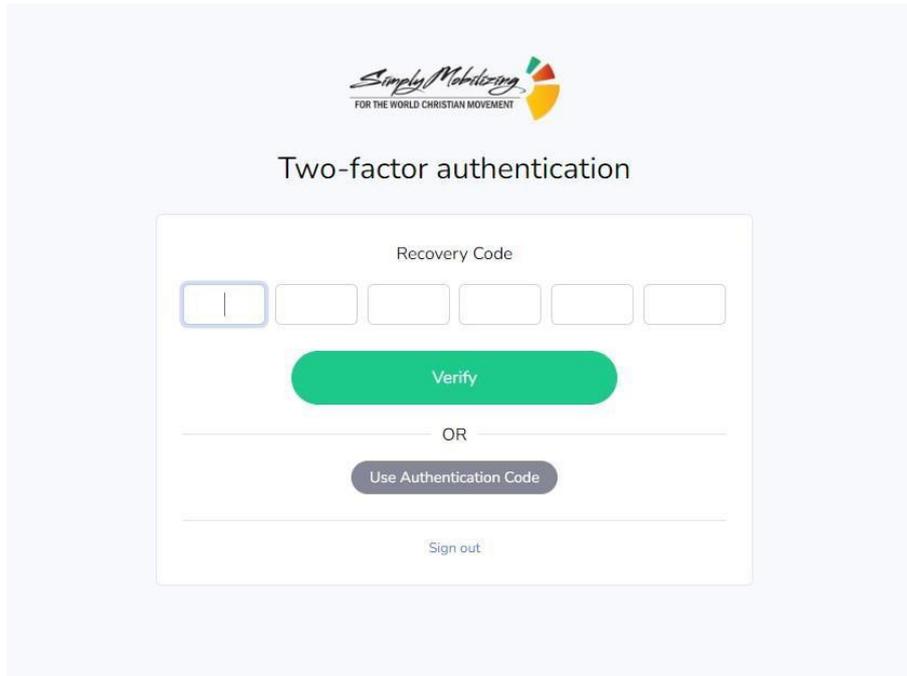
When Two-factor authentication is enabled in an account, the user will be asked to enter the 6-digit code from the authentication app after the user logs in.



## Using the Recovery Code

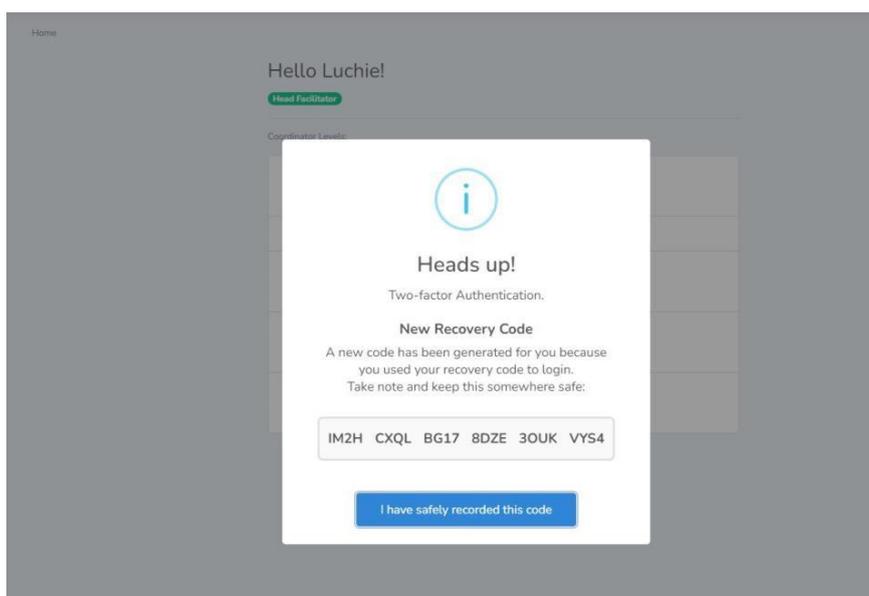
To login using the recovery code, click the “Use Recovery Code” (see above image).

Enter the Recovery code in groups of four in the six text fields. Using the above example recovery code “Q5T9 R1PH F6LY KNJ3 ABOW 40VU”, the “Q5T9” goes into the first field, “R1PH” goes into the second field and so on.



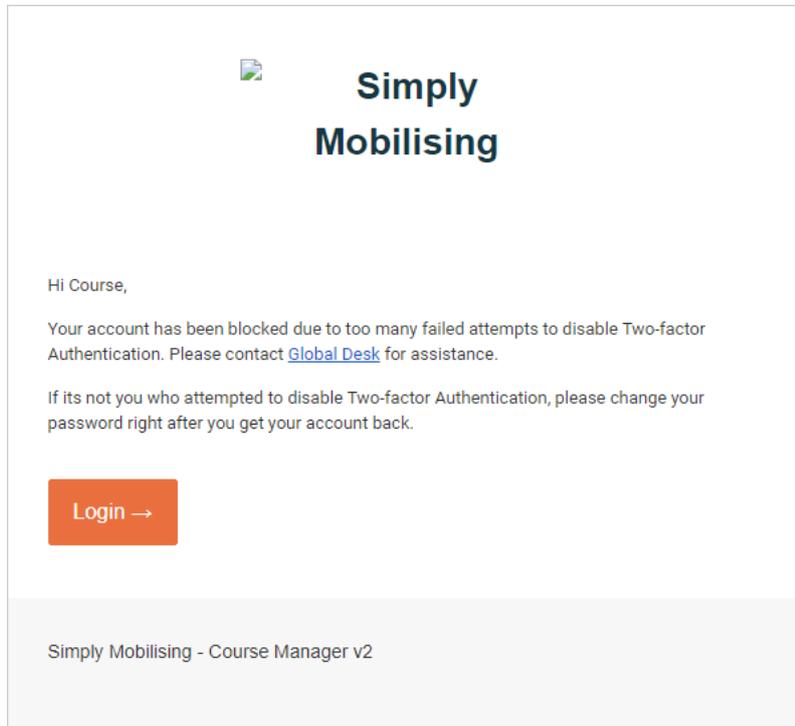
The screenshot shows a login interface for 'Simply Mobilizing FOR THE WORLD CHRISTIAN MOVEMENT'. The title is 'Two-factor authentication'. Below the title is a 'Recovery Code' section with six empty text input fields. A green 'Verify' button is positioned below the fields. Below the 'Verify' button is the text 'OR' and a grey 'Use Authentication Code' button. At the bottom of the form is a 'Sign out' link.

After successfully logging in using the recovery code, a new recovery code will be generated. The user needs to save the new recovery code somewhere secure and private.



## Too many failed attempts

Only three attempts are allowed to enter the correct password when disabling TFA. This prevents malicious actors from brute-forcing the password field. Once the limit is reached, the account will be disabled, and the user will be logged out. A message will also be sent to the email associated with the account to notify of the incident.



## Lost or damaged authentication device

In cases where the authenticating device is lost or damaged and the user is no longer able to log in, they can email [globaldesk@simplymobilizing.com](mailto:globaldesk@simplymobilizing.com) for assistance.

**Please note that the alibi of lost or damaged devices is commonly used by attackers to social engineer their way to getting into the account. Support staff must diligently verify the identity of the person before restoring their account.**



If needed, you may 'Resend' a worksheet to the participant by clicking on the RESEND button.

Manage Worksheets for Zenaida Rubio



Allows distribution of worksheets and assigning it to a facilitator.

#	Worksheet Title	Assigned Facilitator	Status/Action
1	GOD, HIS MISSION AND HIS WORLD	Luchie Swinton	View ↗
2	ISRAEL, THE COVENANT PEOPLE	Luchie Swinton	Resend
3	THE MESSIAH, THE MESSAGE, AND THE MESSENGERS	- Not Assigned	Send ↗

Marked and returned worksheets can be viewed by clicking on the green 'VIEW' button.

Manage Worksheets for Zenaida Rubio



Allows distribution of worksheets and assigning it to a facilitator.

#	Worksheet Title	Assigned Facilitator	Status/Action
1	GOD, HIS MISSION AND HIS WORLD	Luchie Swinton	View ↗
2	ISRAEL, THE COVENANT PEOPLE	Luchie Swinton	Send ↗
3	THE MESSIAH, THE MESSAGE, AND THE MESSENGERS	- Not Assigned	Send ↗
4	EXPANSION OF THE WORLD CHRISTIAN MOVEMENT	- Not Assigned	Send ↗
5	MISSION STRATEGY	- Not Assigned	Send ↗
6	THE TASK REMAINING	- Not Assigned	Send ↗
7	CROSS-CULTURAL CONSIDERATIONS	- Not Assigned	Send ↗
8	WORLD CHRISTIAN TEAMWORK	- Not Assigned	Send ↗

Once the completed worksheet has been marked by the Facilitator and returned to the Participant, an automatic checkmark will appear on the Attendance page indicating that worksheet is completed.

Home / Events / Edit

Event #4964: Kairos

Change Course Type ↗

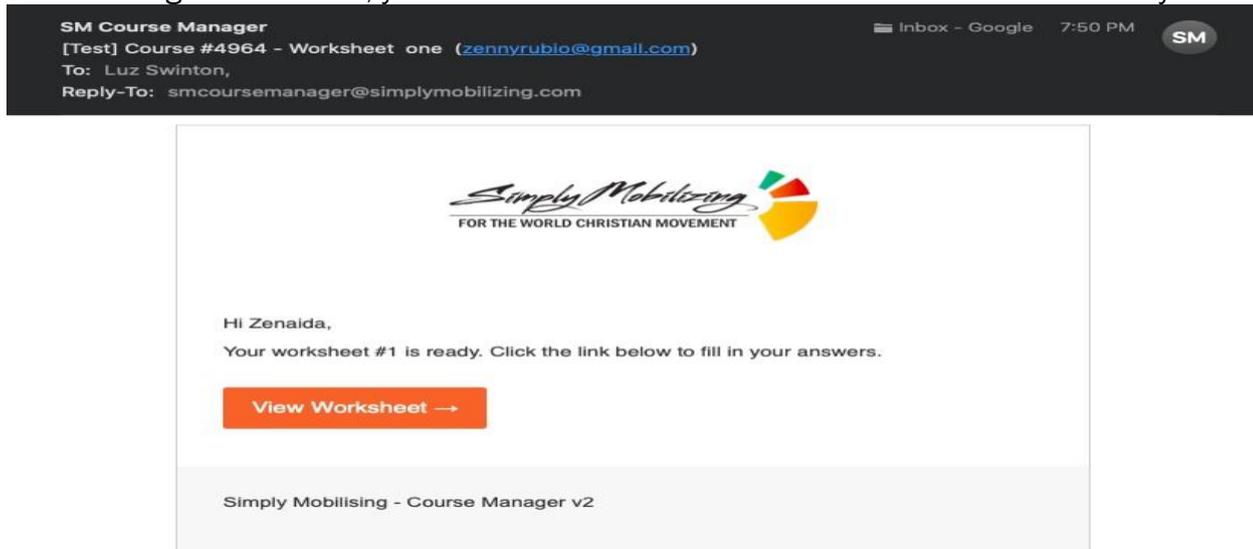
- Plan
- Publicise
- Team
- Components
- Runsheets
- Registration
- Attendance
- Finance
- Report

Attendance

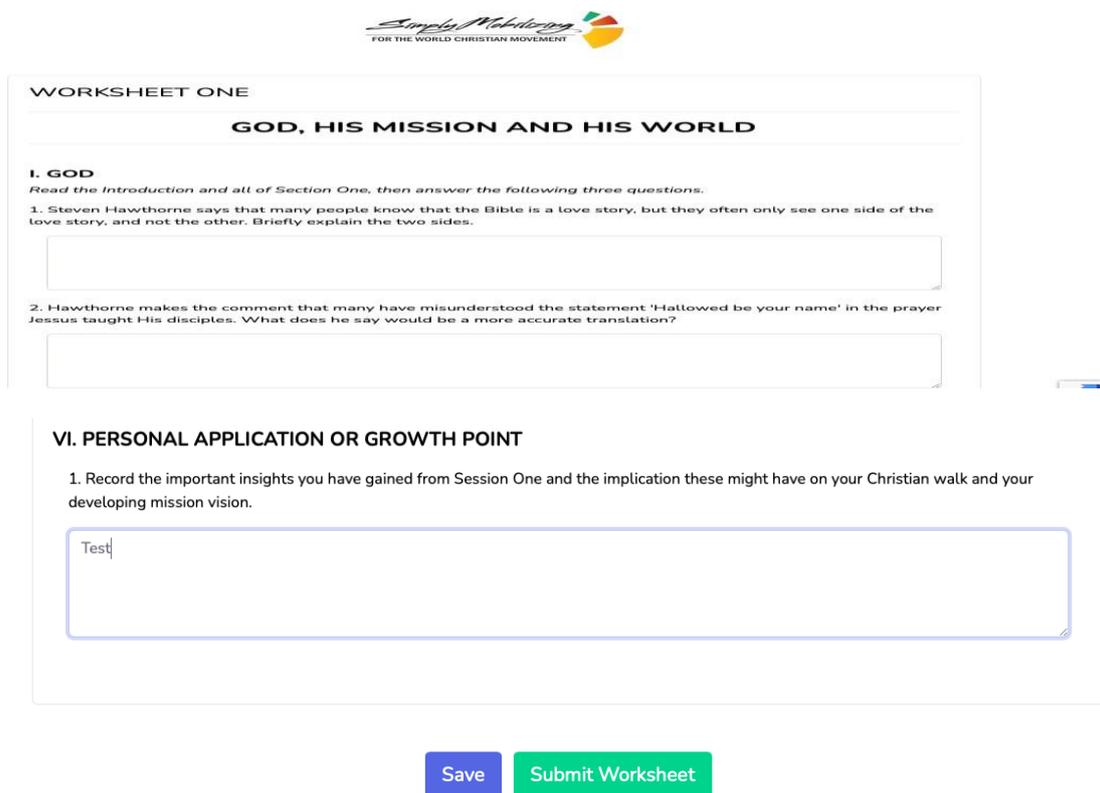
Name ?	Reader Issued	Attendance									Worksheets									Completed ?	FTC ?	Newsletter ?		
		1	2	3	4	5	6	7	8	9	1	2	3	4	5	6	7	8	9					
Zenaida Rubio	en											X												

## Participant viewing and management of worksheets:

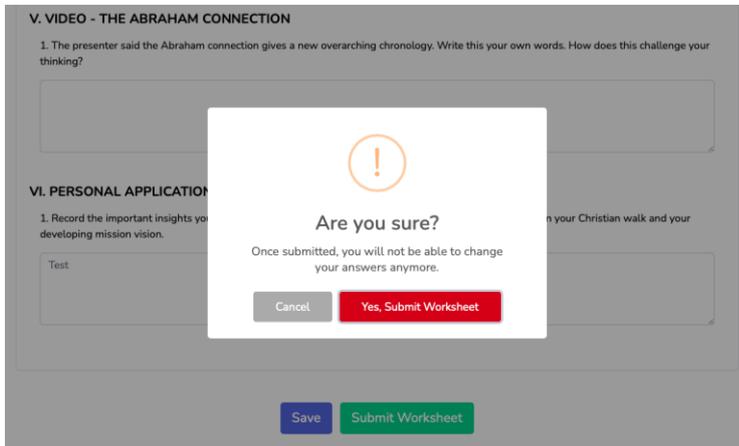
1. Following each session, you will receive an email that a worksheet is available for you to complete:



2. Click on the 'View Worksheet' button and this will take you to a blank Worksheet you can begin answering.



You can **Save** the worksheet to complete it at another time. Once you have completed answering the Worksheet, you are ready to Submit it.



Make sure you are ready to submit the worksheet before you click on ‘Submit Worksheet’ as you will not be able to make changes once submitted.

3. Once your Worksheet has been reviewed by your Growth Point Group leader, you will receive an email notice that a marked worksheet is now available for you to view and/or print.



Click on the ‘View Worksheet’ button to view and/or print.



The returned worksheet will include COMMENTS from your Facilitator.

## VI. PERSONAL APPLICATION OR GROWTH POINT

1. Record the important insights you have gained from Session One and the implication these might have on your Christian walk and your developing mission vision.

Facilitator Comment

Test

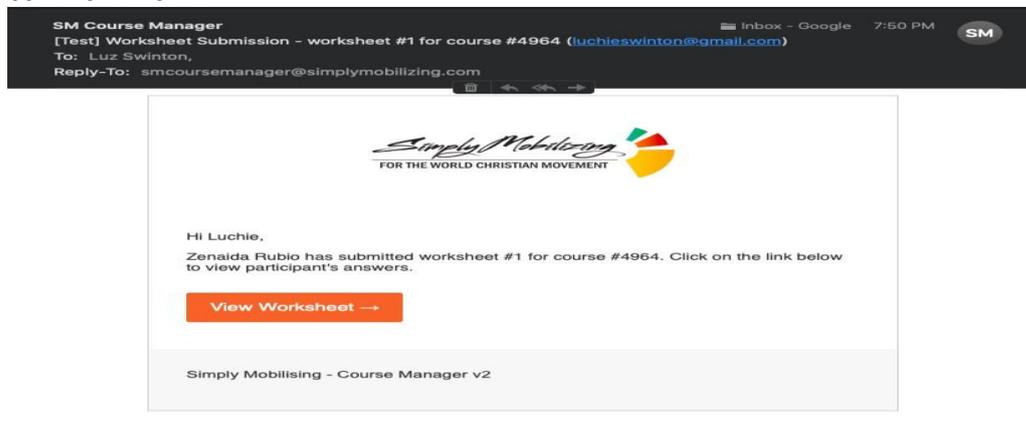
Yes|

### Overall Facilitator Comment

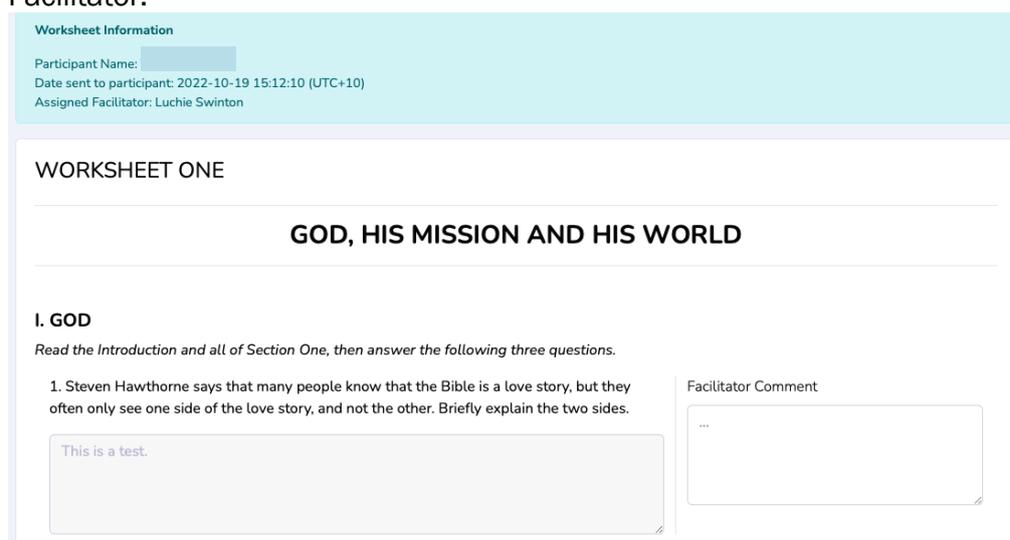
Well done!

## Facilitator process for managing worksheets:

1. Facilitator will receive an email alert that an assigned participant has submitted a worksheet. Clicking on 'View Worksheet' will take you to the participant's completed worksheet which you can now mark.



The Worksheet for marking will include the name of Participant and name of assigned Facilitator.



2. Comments may be made for each section as well as at the bottom of the



worksheet.

3. Click on 'Mark as Complete' button to return marked worksheet to Participant

