GTS MEDOH · ADMINISTRATION

Administrator Guide

Daily administration of the GTS MedOH platform — managing courses, sessions, organisations, compliance and reports.

THIS GUIDE IS FOR

Operations staff · Platform administrators · Booking team

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The Admin Panel

The admin panel is the operational hub of the GTS MedOH platform. Sign in at the admin URL and you land on the Dashboard — a live summary of the current state of the business: revenue this month, sessions needing attention and upcoming bookings.

> ℹ Everything in this guide is done through the admin panel interface. No technical tools are required for daily administration.

Admin roles

ROLE	WHAT THEY CAN DO
Superadmin	Full access including user management and system settings
Admin	Full operational access — all tabs and all data
Operations Admin	Full access to operational data; cannot manage users or settings
Booking Agent	Can create and manage bookings; cannot see revenue or compliance data

Managing Courses

Courses are the foundation of the platform. Every booking, session and compliance record links back to a course.

Adding a new course

1. **Courses → + Add Course**
   Enter the course name, description, duration and standard capacity.

2. **Set the compliance type**
   Select the compliance type this course satisfies. This is the critical step — without it, no compliance records are created when delegates complete the course.

3. **Add course content**
   Fill in the public-facing details: overview, learning outcomes, who it's for, prerequisites and what to bring.

4. **Set the price**
   Enter the standard delegate price. This is used for invoicing and in renewal revenue forecasting.

5. **Publish**
   Toggle the course to Published. It appears on the public course listing and becomes available in the booking form.

> ⚠ **Always set the compliance type.** Without it, completing the course does not create a compliance record for the delegate. This is the most commonly missed step when adding a new course.

Uploading course resources

On any course card, click **Resources** to upload pre-reading PDFs and trainer materials. These appear in the trainer portal for trainers qualified to deliver the course. Delegates do not see these materials.

Managing Sessions

Sessions are the scheduled dates on which courses are delivered. A course can have many sessions.

Scheduling a session

Sessions → + Add Session. Select the course, date, time, location and trainer. Available sessions appear in the booking form immediately.

The daily sessions check

The Dashboard shows a **Needs Attention** section listing sessions whose date has passed but haven't been marked complete. Check this daily and action any outstanding sessions promptly — delegates are waiting for their certificates.

Marking a session complete

1. **Find the session**
   Sessions → find the completed session, or click Mark Complete from the Dashboard Needs Attention section.

2. **Record attendance**
   Tick each delegate who attended. Delegates left unticked are marked Did Not Attend — they do not receive a certificate.

3. **Send review emails**
   Click Send Review Emails. Each attended delegate receives a feedback request. Their certificate is issued automatically once they submit feedback.

> ℹ If a delegate attended but was accidentally left unticked, you can edit the session and mark them attended. Their review email and certificate can then be triggered manually.

Managing Organisations

The CRM tab manages all organisations (companies) on the platform. Each organisation links to their bookings, compliance records, employees and assets.

Adding a new organisation

CRM → Companies → + Add Company. Enter the organisation name exactly as it should appear on bookings and correspondence. The name must be consistent — "NHS Surrey Trust" and "NHS surrey trust" are treated as separate organisations.

Importing from Prospect

If you manage prospect data in Prospect CRM, use CRM → Import to bring company and contact records across without manual re-entry.

Inviting a company booker

Users → Send Portal Invite → enter their email and organisation name. They receive a set-password email and can access the Organisation Hub immediately on first sign-in.

Managing Compliance

The compliance overview

Compliance → Organisation Summary shows all organisations at a glance, worst compliance first. Use this as your daily compliance health check. Organisations with red scores or high expiring counts need attention.

Recording a compliance record manually

When a delegate holds an external certificate (from another provider), or for historical records predating the platform:

Compliance → All Records → + Add Record → select organisation, employee, compliance type, dates and provider name.

Importing bulk compliance records

For large imports — for example, when onboarding a new organisation with an existing compliance history — use the Import Certs button in the Compliance tab. Prepare a CSV file with the required columns and the system previews the import before committing.

Setting competency requirements

Compliance → Competency Requirements → + Add Requirement. Defines which compliance types each job role requires for each organisation. Once set, the gap analysis and competency matrix work automatically.

Compliance types

Comp. Types → shows all compliance categories. Add new types, adjust validity periods and configure reminder schedules without any technical changes. The platform comes pre-configured with 20 standard occupational health types.

Managing Workforce

The Workforce tab shows all employees across all organisations. Employees are displayed as cards with their status, role, department and compliance gap button.

Adding an employee

Workforce → + Add Employee. Set the job role exactly as it appears in the competency requirements — this is how gap analysis works. Department is used in the compliance heatmap.

Employees created automatically

When a certificate is issued for someone not already in the system, an employee record is created automatically. These appear with a status of *incomplete*. Complete their profile by editing: add job role, department and any other details.

Running a gap analysis

On any employee card, click **Gap Analysis**. The system shows every required competency for their job role and whether they hold a current certificate. This is the fastest way to identify what an individual needs before a renewal season or audit.

Managing Assets

Assets → register and track equipment requiring inspection or calibration. Each asset record holds inspection dates, calibration dates and responsible person.

Assets are displayed as cards. Cards with upcoming or overdue inspection/calibration dates highlight in amber or red automatically. Daily automated alerts fire when assets are due within the reminder window.

Risk & Audit Register

Risk & Audit → log risk assessments, COSHH assessments, near misses, accident investigations and corrective actions. Reference numbers are generated automatically (e.g. RA-2026-001, NM-2026-003).

Filter by type, risk level or status. Export the full register to CSV for HSE inspections or ISO audits.

Reports

The Reports tab produces four print-ready management reports:

REPORT	BEST USED FOR
Compliance Status	Management meetings, board reporting
Certificate Expiry	Renewal planning — 90-day horizon view
Asset Inspection	Equipment maintenance scheduling
Risk Register	HSE inspections, ISO 45001 audits

Each report opens in a new tab. Use your browser's Print function and select Save as PDF to produce a document suitable for distribution.

AI Assistant

The AI Assistant tab lets you ask questions about the platform's data in plain English. Type any question and the AI identifies the most appropriate report, runs it and returns a structured response with data, charts and recommended actions.

Example questions:

- *"Which courses generated the most revenue this year?"*
- *"Show expiring certificates in the next 60 days"*
- *"Which organisations have the lowest compliance scores?"*
- *"Generate a management summary for this month"*

Saved reports appear below the chat and can be re-run instantly with a single click.

> ⚠ The AI provides advisory guidance based on data. It does not make compliance decisions. Always verify recommendations with a qualified occupational health professional.

Renewal Intelligence

Renewals → the operational renewal dashboard. Use this to identify which organisations have expiring certifications, which have not booked renewals and which need proactive outreach.

Key figures to watch

- **Total Pipeline** — total forecast renewal revenue from expiring certificates
- **At Risk (unbooked)** — pipeline value where no renewal booking is confirmed

- **Already Booked** — renewals already secured
- **Revenue Leakage** — percentage of pipeline that remains unconverted

AI Recommended Actions

Click **AI Actions** on the Renewals tab to generate account manager recommendations — which organisations to contact, which compliance types to prioritise and what to say.

User Management

Users → manage all platform accounts. You can:

- Search for users by name or email
- Change user roles
- Send portal invitations to new company bookers
- Reset passwords (via the Forgot Password flow on the sign-in screen)

> ℹ Only Superadmins can grant Admin or Superadmin roles. Admins can manage all other roles. You cannot change your own role.

Common Daily Tasks — Quick Reference

TASK	WHERE TO GO
Check for sessions needing attention	Dashboard → Needs Attention
Mark a session complete and issue certificates	Sessions → find session → Manage → record attendance → Send Reviews
Book a delegate	Booking form (from the Sessions or Dashboard)
Add a new organisation	CRM → Companies → + Add Company
Invite a company booker	Users → Send Portal Invite
Record an external certificate	Compliance → All Records → + Add Record
Check upcoming certificate expiries	Renewals → Certs Expiring column
Run a compliance report	Reports → Compliance Status
Find a specific certificate	Certificates tab → search by delegate name or course