

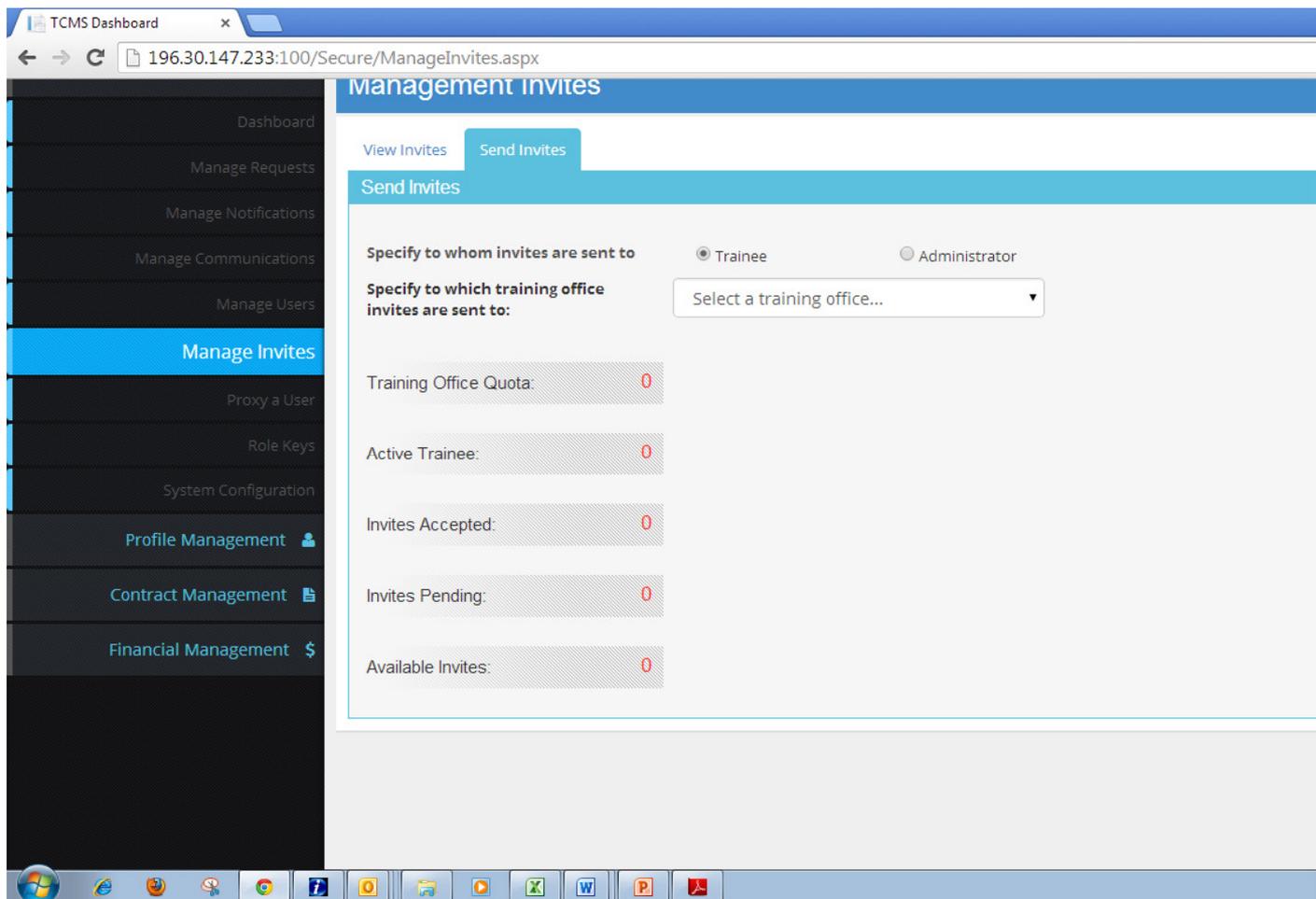
How to invite trainees and administrators

- A training office administrator or the training officer may invite trainees
- Only the training officer may invite a training office administrator

1. Log into TCMS
2. Under the menu item on the left hand side of the screen select manage invites

The screenshot shows the TCMS Dashboard interface. The left sidebar contains a menu with the following items: Admin, Dashboard, Manage Requests, Manage Notifications, Manage Communications, Manage Users, **Manage Invites** (highlighted), Proxy a User, Role Keys, System Configuration, Profile Management, Contract Management, and Financial Management. The main content area displays a 'Dashboard' with a welcome message and a grid of request counts. A blue arrow points from the text 'select manage invites' to the 'Manage Invites' menu item.

Request Type	Count	Request Type	Count	Request Type	Count
Applications In Progress	1	IRBA Approval	0	SAICA Approval	0
Suspend Requests	28	Return From Suspend Requests	9	Extend Request	0
Remission Requests	119	Cancel Requests	16	Unilateral Cancellation	0
Discharge Requests	541	Data Modification Requests	0	Date Modification	0
Elective Modification Requests	0	Profile Details Changes	0	Contact Details	0
Contracts on Hold	27	Reverted	3	Invoices To Go	0
Communications	0				



3. Under manage invites there are two tabs, the first tab is view invites – this refers to invites already sent and the second tab refers to trainees to be invited – this is the send invites tab,
4. The send invites tab has two options, to invite trainees and to invite administrators
5. The screen displays the quota (number of trainees that SAICA has allocated to the training office, the active trainees, the invites accepted, the invites pending and the available invites

6. Complete the information on the screen for the invitation

TCMS Dashboard

196.30.147.233:100/Secure/ManageInvites.aspx

Manage Notifications

Manage Users

Manage Invites

Profile Management

Contract Management

Financial Management

Specify to which training office invites are sent to: PricewaterhouseCoopers, Pietermaritzb

Training Office Quota: 40

Active Trainee: 31

Invites Accepted: 0

Invites Pending: 0

Available Invites: 9

First Name: James

Surname: Roth

ID Number: [Redacted]

Mobile Number: 083123456

Email Address: beverleyh@saica.co.za

01:34 PM

7. Once done click on add to list then select the send invites button

TCMS Dashboard

196.30.147.233:100/Secure/ManageInvites.aspx

Invites Pending: 0

Available Invites: 9

First Name: [Empty]

Surname: [Empty]

ID Number: [Empty]

Mobile Number: [Empty]

Email Address: [Empty]

Add To List

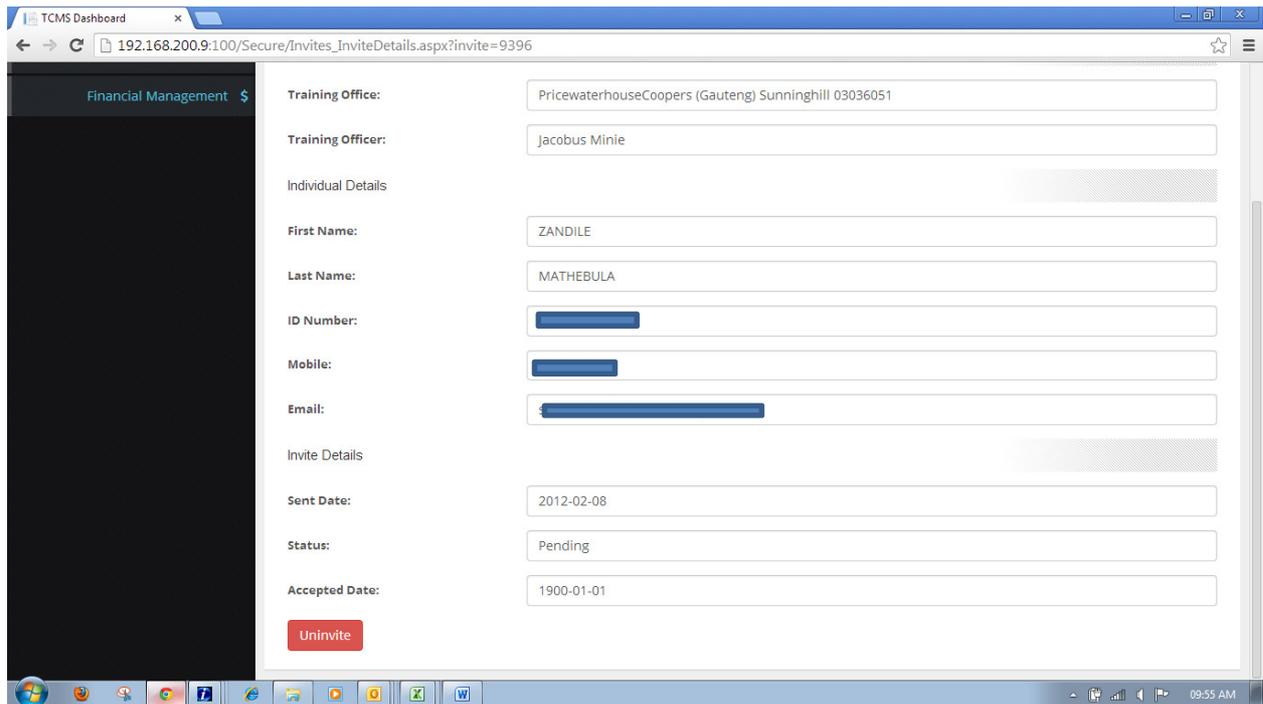
First Name	Last Name	ID Number	Mobile	Email	
James	Roth	900530005643	0831234550	beverleyh@saica.co.za	Remove

Send Invite(s)

Choose File No file chosen

Upload Worksheet

01:37 PM



1. The screen will show a message that the invite has been sent successfully
2. The trainees will receive the invites with a link to TCMS
3. The administrator must either sign up or log into TCMS to accept the invite, **the administrator must select manage invites and scroll to the bottom of page and click the button accept**
4. The accept will activate the relationship and the administrator will have access to the trainees for the training office
5. The trainee or administrator can be uninvited by selecting the invite from the view invites and clicking on uninvite