



Q

CEU Course admin pages

CEU Leads setup -- behind the scenes

The components

- **Two main areas:**
 - Course-setup administration.
 - Email-template administration.
- Only certain users can access these pages in Q. Those are users in the “CEU Lead Email Template Editors” or System Admin roles.
- Course setup: <https://portal.forms-surfaces.com/Q/CEUCourseAdmin>
- Email template setup: <https://portal.forms-surfaces.com/Q/MKTCEULEadsEmailTempList>

Course-setup layout

Q2 Beta is available for review. [Click here to check it out.](#)

MKTCEUCI

CEU COURSE ADMIN

ADD/EDIT CHOICES

| Action | CEU Association |
|----------------------|-----------------|
| Edit | CEU Association |
| Edit | CEU Course Name |
| Edit | CEU Delivery |
| Edit | CEU Format |
| Edit | CEU Source |

↓ Create Filter

New

COURSES

| Action | Name | Association | Source | ID | Class Value | Subject | Designation | Delivery | Format | Start Date |
|----------------------|---|-------------|----------------------|------------|-------------|---|-------------|--------------|-------------|------------|
| Edit | Digital Art in Architectural Projects | IDCEC | Lunch and Learn | CEU-105320 | 0.1 | 8. Business & Professional Practice 7. Graphics | General | Face-to-face | PPT | 5/4/2016 |
| Edit | Digital Art in Architectural Projects | AIA | Lunch and Learn | F+S1 | 1 | | HSW | Face-to-face | PPT | 4/5/2016 |
| Edit | Healing Environments: New Design Directions, New System Solutions | AIA | Architectural Record | | 1 | | | On-Demand | Interactive | 9/15/2015 |
| Edit | Digital Art in Architectural Projects | AIA | Architectural Record | | 1 | | HSW | On-Demand | Interactive | 9/15/2015 |

↓ Create Filter

Top grid contains the components that make up a CEU Course.

Bottom grid contains the courses that have been created.

Top grid

| Action | | ADD/EDIT CHOICES | |
|---------------|---|---|--|
| > | Edit | CEU Association | |
| ∨ | Edit | CEU Course Name | |
| New | | | |
| # | Name | Value (make the same as Name) | |
| | Digital Art in Architectural Projects | Digital Art in Architectural Projects | |
| | Healing Environments: New Design Directions, New System Solutions | Healing Environments: New Design Directions, New System Solutions | |
| > | Edit | CEU Delivery | |
| > | Edit | CEU Format | |
| > | Edit | CEU Source | |
| Create Filter | | | |

Click chevron to open choices for this Course component (here, CEU Course Name is open). Click the New button to make a new option.

A word of caution:

If you edit any of these options, the changes you make will affect ALL created Courses that have been made thus far. So, if you change the Name of the “Digital Art in Architectural Projects” option to “XYZ”, all CEU Leads in the database who took this course will now look like they took “XYZ”. Creating a new component for “XYZ” would make more sense.

| COURSES | | | | | | | | | | |
|---|---|-------------|----------------------|------------|-------------|---|-------------|--------------|--------|-------------|
| Action | Name | Association | Source | ID | Class Value | Subject | Designation | Delivery | Format | |
| New | | | | | | | | | | |
| Edit | Digital Art in Architectural Projects | IDCEC | Lunch and Learn | CEU-105320 | 0.1 | 8. Business & Professional Practice 7. Graphics | General | Face-to-face | PPT | |
| <div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p>Name <input type="text" value="Digital Art in Architectural Projects"/></p> <p>Subject <input type="text"/></p> <p>Source <input type="text" value="Lunch and Learn"/></p> <p>Start Date <input type="text" value="4/5/2016"/></p> </div> <div style="width: 30%;"> <p>ID <input type="text" value="F+S1"/></p> <p>Designation <input type="text" value="HSW"/></p> <p>Delivery <input type="text" value="Face-to-face"/></p> <p>End Date <input type="text" value="4/5/2019"/></p> </div> <div style="width: 30%;"> <p>Class Value <input type="text" value="1"/></p> <p>Association <input type="text" value="AIA"/></p> <p>Format <input type="text" value="PPT"/></p> </div> </div> <p>Update Cancel</p> | | | | | | | | | | |
| Edit | Healing Environments: New Design Directions, New System Solutions | AIA | Architectural Record | | 1 | | | | | Interactive |
| Edit | Digital Art in Architectural Projects | AIA | Architectural Record | | 1 | | HSW | On-Demand | | Interactive |

Bottom grid

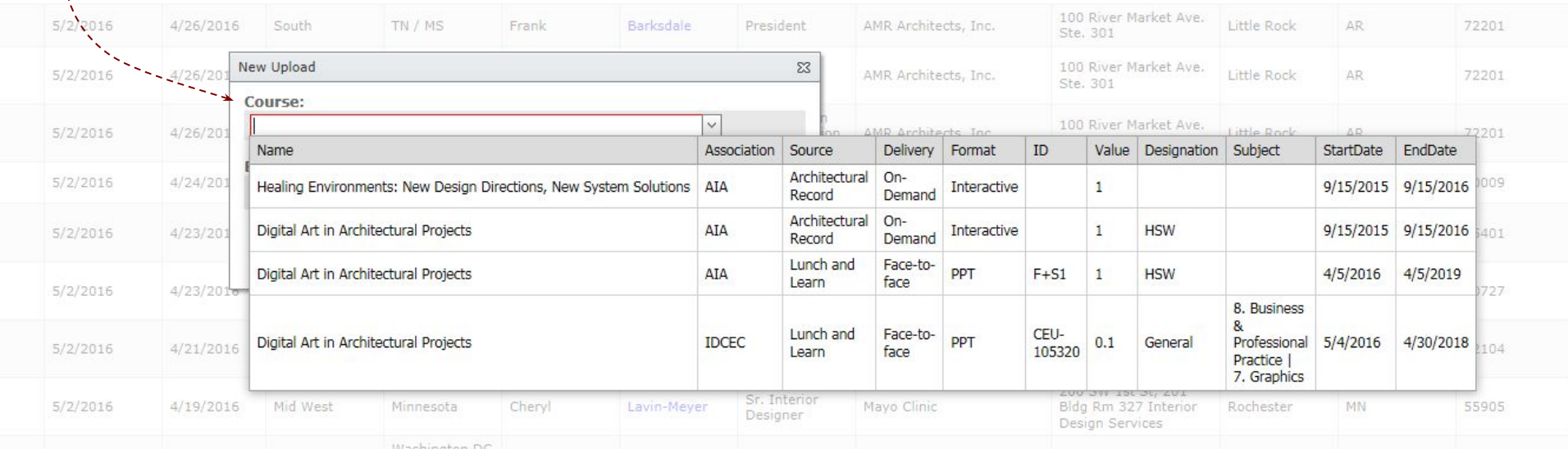
- Click the New button to make a new Course.
- Click Edit to make changes to a Course. Here, Edit was clicked on the “Digital Art in Architectural Projects” Face-to-face Course. These fields are the same ones you’d see if you had clicked the New button to create a Course.

A word of caution:

- Editing an existing Course, as with the top grid, will change all existing Leads tied to this Course. Creating a new Course might be better than editing.

Where do these show up?

On <https://portal.forms-surfaces.com/Q/CEULeads>, when doing an upload, there is a dropdown control offering all of the created Courses that are currently active (StartDate older than today and EndDate that has not been reached yet).



| Name | Association | Source | Delivery | Format | ID | Value | Designation | Subject | StartDate | EndDate |
|---|-------------|----------------------|--------------|-------------|------------|-------|-------------|---|-----------|-----------|
| Healing Environments: New Design Directions, New System Solutions | AIA | Architectural Record | On-Demand | Interactive | | 1 | | | 9/15/2015 | 9/15/2016 |
| Digital Art in Architectural Projects | AIA | Architectural Record | On-Demand | Interactive | | 1 | HSW | | 9/15/2015 | 9/15/2016 |
| Digital Art in Architectural Projects | AIA | Lunch and Learn | Face-to-face | PPT | F+S1 | 1 | HSW | | 4/5/2016 | 4/5/2019 |
| Digital Art in Architectural Projects | IDCEC | Lunch and Learn | Face-to-face | PPT | CEU-105320 | 0.1 | General | 8. Business & Professional Practice 7. Graphics | 5/4/2016 | 4/30/2018 |

Email-template layout

| Association | Delivery | Source | Name | Start Date | End Date | Last Edited |
|-------------|--------------|----------------------|---|------------|-----------|-------------|
| AIA | On-Demand | Architectural Record | Digital Art in Architectural Projects | 9/15/2015 | 9/15/2016 | 5/13/2016 |
| AIA | On-Demand | Architectural Record | Healing Environments: New Design Directions, New System Solutions | 9/15/2015 | 9/15/2016 | 5/17/2016 |
| AIA | Face-to-face | Lunch and Learn | Digital Art in Architectural Projects | 4/5/2016 | 4/5/2019 | 5/16/2016 |
| IDCEC | Face-to-face | Lunch and Learn | Digital Art in Architectural Projects | 5/4/2016 | 4/30/2018 | 5/17/2016 |

Click “New” button to make a new template.*

Click on a Course name to edit that entry.

* You can only create a new template for a Course that has been created but doesn't have an email template already linked to it.

Editing/creating

Save Cancel

CEU Email Template

Course:

Subject Text:

Email Text:

Conditional for certificate

Course name

Date finished course

HTML Link

Recipient firstname

Recipient lastname

Trainer fullname

1

2

3

4.

1. Select the course that this template will be for (the only choices will be Courses that do not have a template).
2. Subject text. This will be the subject of the email to Leads, which can contain variables.
3. Email text. This will be the body of the email sent to Leads, which can contain variables. When the email is sent, there will be a plain text version and an HTML version (more on this in the HTML Link information).
4. Variables that can be added to the template.

Simple variables

The screenshot shows a web interface for editing an email template. At the top, there are 'Save' and 'Cancel' buttons. Below them is a red header bar labeled 'CEU Email Template'. The main content area is divided into three sections: 'Course:', 'Subject Text:', and 'Email Text:'. The 'Course:' section contains a dropdown menu with the selected option 'Healing Environments: New Design Directions, New System Solutions | IDCEC | Lunch and Learn | Face-to-'. The 'Subject Text:' section contains a text box with the text 'This is an example for using variables. Course name = <<coursename>>'. The 'Email Text:' section contains a text box with the text 'Dear <<recipfirstname>>,' followed by 'My name is <<trainerfullname>>,' and 'So glad you could attend our class on <<coursefinisheddate>>'. To the right of the main editor is a vertical sidebar with several buttons: 'Conditional for certificate', 'Course name', 'Date finished course', 'HTML Link', 'Recipient firstname', 'Recipient lastname', and 'Trainer fullname'. Red dashed lines connect these buttons to the corresponding variable placeholders in the email text.

- **A variable will be placed wherever your cursor is when you click the button**, e.g, the cursor was at the end of “Dear ” when the “Recipient firstname” variable button was clicked.
- “Course name”, “Date finished course”, “Recipient firstname”, “Recipient lastname”, and “Trainer fullname” are straight-forward. Wherever the variable appears in the text, the value for that Lead will be injected when the email is sent.
- No spaces will be added at emailing time. Be sure to include them where needed outside of the variable.

Complex variables

The screenshot shows a 'CEU Email Template' editor. The 'Course' dropdown is set to 'Healing Environments: New Design Directions, New System Solutions | IDCEC | Lunch and Learn | Face-to-'. The 'Subject Text' field contains 'This is an example for using variables. Course name = <<coursename>>'. The 'Email Text' field contains the following text with variables highlighted by red dashed boxes: 'Dear <<recipfirstname>>,'; 'My name is <<trainerfullname>>. So glad you could attend our class on <<coursefinisheddate>>.'; 'I want you to <<linktext|url>>| Please <<linktext|url>> so we can evaluate our course.'; and a conditional block '<<conditionaltext>>'. To the right, a list of variables is shown: 'Conditional for certificate', 'Course name', 'Date finished course', 'HTML Link', 'Recipient firstname', 'Recipient lastname', and 'Trainer fullname'. Red dashed lines connect the variable placeholders in the email text to their corresponding entries in the list.

- A “Conditional for certificate” variable and two “HTML Link” variables have been added above.
- These need a bit more work because they will insert custom text/code at each instance.

'Conditional for certificate' variable

Initial appearance:

```
My name is <<trainerfullname>>. So glad you could attend our class on <<coursefinisheddate>>.  
{conditional|text}  
I want you to <<linktext|url>>. Please <<linktext|url>> so we can evaluate our course.
```

- Variable is enclosed in double braces and contains the word “conditional” a pipe character (“|”) and the word “text”.

Edited appearance:

```
My name is <<trainerfullname>>. So glad you could attend our class on <<coursefinisheddate>>.  
{conditional|Attached is a certificate for proof of completing the course.}  
I want you to <<linktext|url>>. Please <<linktext|url>> so we can evaluate our course.
```

- “Attached is a certificate for proof of completing the course.” was inserted where “text” had been. This line will be added to the email when the Lead meets requirements for a certificate (a programmer will still be setting that up). If the Lead doesn’t meet those requirements, nothing is inserted.

'HTML Link' variable

Initial appearance:

```
{{conditional|Attached is a certificate for proof of completing the course.}}
```

I want you to <<linktext|url>>. Please <<linktext|url>> so we can evaluate our course.

- Variable is enclosed in double angles and contains the word “linktext” a pipe character (“|”) and the word “url”.

Edited appearance:

```
{{conditional|Attached is a certificate for proof of completing the course.}}
```

I want you to <<visit Google's site|https://www.google.com>>. Please <<take a brief survey|https://www.surveymonkey.com/r/GZW9MYS>>|so we can evaluate our course.

- Replace “linktext” with the verbiage you want to act as a link. Wording like “click here” won’t work (see next slide for more info). Do not delete the pipe character (“|”) or the double angles.
- Replace “url” with the Web address you want the link to point to. Please ignore the cursor before “so” in the image above.

'HTML Link' linktext verbiage style

- As was mentioned early in this document, there are two sets of email body text that are created for the email before it is sent: plain text and HTML. Because of this, there is a style to writing linktext.

Example:

```
{{conditional|Attached is a certificate for proof of completing the course.}}
```

```
I want you to <<visit Google's site|https://www.google.com>>. Please <<take a brief survey|https://www.surveymonkey.com/r/GZW9MYS>>|so we can evaluate our course.
```

- In the example above, there are two HTML Link variables; one to Google and one to an online survey at Surveymonkey (that's the cursor before "so"; please ignore it).
- The way these linktexts are written, these lines will appear this way for the two email types:
 - **Plain text version:**
 - I want you to visit Google's site (https://www.google.com). Please take a brief survey (https://www.surveymonkey.com/r/GZW9MYS) so we can evaluate our course.
 - **HTML text version:**
 - I want you to [visit Google's site](https://www.google.com). Please [take a brief survey](https://www.surveymonkey.com/r/GZW9MYS) so we can evaluate our course.

Example

Template in Q:

Course:
Digital Art in Architectural Projects | IDCEC | Lunch and Learn | Face-to-face

Subject Text:
Forms+Surfaces <<coursename>>

Email Text:
Dear <<recipfirstname>>,
Thank you for attending the Lunch and Learn on "<<coursename>>". I hope it's inspired you to find new ways to integrate artwork and digital photography into your projects.
{(conditional|Attached, you'll find a certificate of completion to serve as proof of your attendance.)}
I invite you to try our <<Zoom Digital Darkroom|https://www.zoomdigitaldarkroom.com>>, and discover how easy it is to bring nature's photographic beauty to large-scale glass applications.
Let me know if I can help you bring what you've learned to your practice and use F+S products to achieve your design goals.
Lastly, your feedback is valued. Please <<take a brief survey|https://www.surveymonkey.com/r/GZW9MYS>> that will help us evaluate the effectiveness of our continuing education course.
Best regards. [TM to customize closing as appropriate per instance]

* There is a little bit of extra verbiage in the example email (at right); it was sent in testing mode. The additions in the subject line and beginning of the email body wouldn't be present in the live Q system.

Email (HTML), in testing mode*:

Wed 5/18/2016 9:00 AM
Chris Ream
EMAIL TESTING: Forms+Surfaces Digital Art in Architectural Projects
To: Chris Ream

Message CEUcertificate.pdf (50 KB)

Suggested Meetings Action Items + Get more apps

IN TESTING. If not, would be from: chad.schaefer@forms-surfaces.com To: michael.hof@forms-surfaces.com

Dear Michael,

Thank you for attending the Lunch and Learn on "Digital Art in Architectural Projects". I hope it's inspired you to find new ways to integrate artwork and digital photography into your projects.

Attached, you'll find a certificate of completion to serve as proof of your attendance.

I invite you to try our [Zoom Digital Darkroom](https://www.zoomdigitaldarkroom.com), and discover how easy it is to bring nature's photographic beauty to large-scale glass applications.

Let me know if I can help you bring what you've learned to your practice and use F+S products to achieve your design goals.

Lastly, your feedback is valued. Please [take a brief survey](https://www.surveymonkey.com/r/GZW9MYS) that will help us evaluate the effectiveness of our continuing education course.

Best regards.

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