

## HBSMR Training Course Information

### *HBSMR Training*

#### **Why is training required?**

HBSMR is designed to be user-friendly and intuitive for professional staff, however it is a sophisticated database system with extensive functionality and many configuration options. To use HBSMR successfully we therefore recommend that all users should attend at least the "Introduction to HBSMR" training course. In addition, it is essential to have at least one member of staff taking responsibility for System Administration, and they too must be appropriately trained.

All Introductory courses include GIS training, using either MapInfo, ArcGIS or QGIS, as appropriate.

All courses are given in the current release of HBSMR. Training in previous versions can be arranged on request.

#### **Certificates and Feedback**

For Continuing Professional Development purposes, certificates are issued for all HBSMR courses.

All attendees will be asked to complete a feedback forms, as these are very helpful to us in maintaining and improving the quality of our training services. We would be grateful for your honest and constructive feedback at the end of the course.

#### **Training Facilities in Talgarth**

Our training suite is equipped with high-specification networked PCs. Refreshments (tea, coffee and biscuits) are provided throughout the day, and lunch is provided at one of several excellent local restaurants.

#### **Online training**

Our online training is delivered using our cloud-based servers. Delegates receive individual RDP files in advance to use to access the server for the duration of the course. Each delegate will have their own individual instance of HBSMR to use, which is connected to our training database. Tuition is delivered using Microsoft Teams, using video and audio – the tutor's screen will be shared for most of the course, so that the delegates can see the demonstrations and accompanying explanations. The optimum set-up is to have two screens, so that delegates can view their own instance of HBSMR as well as that of the tutor.

## **HBSMR courses**

### **Overview**

Training can be provided in our training suite in Talgarth, online or at your offices. For on-site courses it is your responsibility to ensure that sufficient PCs and facilities are available, though PCs can be hired from Exegesis SDM if necessary. For online courses, it is your responsibility to ensure that the internet connection is sufficiently fast and that there are no firewall issues which would prevent connection to the training server (this will be tested in advance so that changes can be made if necessary).

All courses include a course book with worked examples and exercises. For online courses, these will be sent out in advance to your nominated postal address.

### **Introduction to HBSMR: 2 days (classroom); 3 days (online)**

Designed for all users of the HBSMR software.

Pre-requisites:

- Familiarity with Microsoft Windows and PC-based computing would be advantageous.

The instructor may vary course content to suit individual requirements, but the content will include most of the following:

- Principles of relational databases and GIS in archaeology
- Archaeological data standards and recording practice
- HBSMR and MapLink software functionality, including:
  - Data entry, entering and linking records
  - Finding information
  - Constructing filters and exports
  - Reporting
  - Entering and editing spatial data using the MapLink GIS module
  - Searching and using spatial data
  - Printing and exporting maps
  - Using the simple search and browser forms
- Introduction to System Administration tasks

### **HBSMR System Administration: 2 days (classroom); 3 days (online)**

Designed for HER staff and IT support staff responsible for System Administration.

Pre-requisites:

- Experience of using HBSMR, preferably with Introduction to HBSMR training

- Knowledge of relational databases, Microsoft Access and writing queries in SQL would be advantageous but is not essential
- Knowledge of GIS would be advantageous but is not essential

The instructor may vary course content to suit individual requirements, but the content will include most of the following:

- How HBSMR works - additional modules and system architecture options
- Relational database basics, including referential integrity
- System Administrator responsibilities, including
  - Configuration file (HBSMR.ini) settings
  - Installing Hotfixes
  - Backup strategies
  - Deciding on architecture options to suit local operating environment
  - Thesaurus maintenance - upgrades and creating candidate terms
  - Security and passwords
  - Troubleshooting and using Exegesis technical support
  - Customising the user interface
  - Maintaining data quality
- Managing look-up tables
- Building queries to identify problem data, missing records, etc.
- Building queries to extract and analyse data
- Introduction to creating custom forms and tabs
- Introduction to creating and modifying reports
- HBSMR Browser interface
- User Account configuration
- Simple Search Tool
- Auditing and Audit Trail
- In-built Admin Functions
- Import/Export functions
- MapLink GIS module administration:
  - Configuring the MapLink module
  - Customising the map view – legends, scale limiters, labelling
  - Customising the map view – legends, scale limiters, labelling
  - Importing and exporting GIS data
  - Spatial metadata

## QGIS for HBSMR: 2 days (classroom); 3 days (online)

Designed for HER staff who have previously worked with MapInfo/ArcGIS but are switching to use QGIS with HBSMR.

Pre-requisites:

- Experience of using HBSMR, preferably with Introduction to HBSMR training
- Knowledge of relational databases, Microsoft Access and writing queries in SQL would be advantageous but is not essential
- Knowledge of GIS would be advantageous but is not essential

The instructor may vary course content to suit individual requirements, but the content will include most of the following:

- Layers and Projects
- Setting map options
- Moving around the map
- Selecting features
- Memory Layer
- The Attribute Table
- Checking geometry validity
- Labelling
- Creating buffers
- Using Print Composer
- Hyperlinks
- Plugins
- Setting up QGIS for HBSMR
- MapLink toolbar buttons
- Feature editing
- Adding features to an existing vector layer
- Viewing and saving selected objects
- Creating new map features
- Complex graphic objects
- Merging/splitting polygons
- Spatial selection
- Creating points from external data and updating database
- HBSMR v5
  - Database structure
  - The new XY Form
  - Views
  - Altering views
  - Template links

## Further GIS Training and Customised HBSMR Courses

We also provide a range of more thorough GIS training courses (in ArcMap, MapInfo and QGIS) for users wishing to progress beyond basic functionality and administration. Courses can be booked for individuals or for a group (usually from the same organisation).

See the main Exegesis training web page for details of GIS courses and prices (<https://www.esdm.co.uk/training>).

Training courses can also be customised to target specific requirements, and include an element of consultancy, e.g. to concentrate on data entry and validation, or developing a particular custom tab form. This training can be based on real datasets.

These courses can be provided in our training suite in Talgarth, online or at your offices.

Please contact us to discuss your requirements and for details of pricing.

## Pricing

Please contact us to discuss current pricing – contact details below.

## How to book

A signed booking form is required for each delegate. Please print out the booking form attached to the end of this document, fill in the form, and return it to Exegesis SDM by e-mail or post. We will acknowledge receipt of your booking.

Bookings are processed on a first-come, first-served basis. We recommend that you submit your application form at least two months before your course. Before you submit the form, please contact us to check availability. Course schedules and availability are normally confirmed approximately three weeks before the scheduled course date.

We require at least three delegates to have booked before we can confirm that the course will proceed. In the event that a delegate has booked onto and paid for a course that does not proceed, we will either defer the booking until the course is next run, transfer the booking to another course, or refund the course fee in full, as requested.

## Payment

A purchase order number is required for us to issue an invoice. Alternatively, we can accept payment by cheque made payable to Exegesis SDM Ltd.

## Travel

Travel arrangements are the responsibility of the delegate. Exegesis SDM assumes no responsibility for non-refundable travel arrangement losses resulting from course scheduling changes or cancellations.

## Refunds

Course fees will be refunded if we receive notice of cancellation at least fifteen business days prior to the course date. Full course fees will be charged to delegates who cancel 14 days or less before the course start date or who fail to appear for the course.

## Accommodation

Exegesis SDM provides some information on local accommodation: <https://www.esdm.co.uk/where-to-stay> Delegates are responsible for making their own arrangements.

## Contact

To discuss your training needs and requirements, please contact us using the following details:

Address	Phone	E-mail
Exegesis SDM Ltd Great House Barn New Street Talgarth Powys LD3 0AH	01874 + Direct Line Crispin: 713072 Steve: 713079 Sylvina: 713065 Abby: 713084 Emily: 713063	<a href="mailto:esdm_hbsmr@esdm.co.uk">esdm_hbsmr@esdm.co.uk</a> <a href="mailto:CrispinFlower@esdm.co.uk">CrispinFlower@esdm.co.uk</a> <a href="mailto:SteveEllwood@esdm.co.uk">SteveEllwood@esdm.co.uk</a> <a href="mailto:SylvinaTilbury@esdm.co.uk">SylvinaTilbury@esdm.co.uk</a> <a href="mailto:AbbyCresswell@esdm.co.uk">AbbyCresswell@esdm.co.uk</a> <a href="mailto:EmilyPennifold@esdm.co.uk">EmilyPennifold@esdm.co.uk</a>

## Terms and Conditions

All prices are exclusive of VAT at 20%. All products, services and prices are subject to change without notice.

Consultancy, training and application development costs are negotiable, depending on the number of days and type of work specified. Expenses will be charged to cover accommodation, subsistence, travel and travel time as appropriate. Please ask for a detailed quote.

## Trademarks

MapInfo® and MapInfo Professional® are registered trademarks of Pitney Bowes Business Insight

MapBasic® is a registered trademark of Pitney Bowes Business Insight

Microsoft® and MS-DOS® are registered trademarks and windows is a trademark of Microsoft Corporation

ArcView® and ArcGIS® are registered trademarks of ESRI Inc

OS MasterMap®, LandLine®, Strategi® are registered trademarks of the Ordnance Survey



## HBSMR Training Booking Form

Please complete the form and send or email to Exegesis SDM at the address below.

**Delegate Name:** \_\_\_\_\_

**Organisation/Address:** \_\_\_\_\_

**Tel:** \_\_\_\_\_

**e-mail:** \_\_\_\_\_

Course name	Dates	Location	Price

**Invoice information (where different from above)**

**Contact Name:** \_\_\_\_\_

**Organisation/Address:** \_\_\_\_\_

**Tel:** \_\_\_\_\_

**e-mail:** \_\_\_\_\_

**Order attached:** Yes/No                      **Purchase order number:** \_\_\_\_\_

**I understand and agree to the terms and conditions of this application (required):**

**Date** \_\_\_\_\_ **Signature** \_\_\_\_\_

- A completed and signed booking form is required from each delegate. Before you send or email this form, contact your HBSMR consultant, using the contact details on p7, to check availability. Registrations are processed on a first-come, first-served basis. We recommend you submit this booking form at least two months prior to the course date. We will acknowledge receipt of your booking. Course schedules and bookings are normally confirmed approximately three weeks before the course date.
- A purchase order number is required for us to issue an invoice. Alternatively we can accept payment by cheque made payable to Exegesis SDM Ltd.
- We require at least three delegates book before we can confirm that the course will proceed. In the event that a delegate has booked onto and paid for a course that does not proceed, we will either defer the booking until the course is next run, transfer the booking to another course, or refund the course fee in full, as requested.
- Travel arrangements are the responsibility of the delegate. Exegesis SDM Ltd. assumes no responsibility for non-refundable losses resulting from course scheduling changes or cancellations.
- Course fees will be refunded if we receive notice of cancellation at least fourteen business days before the course date. Full course fees will be charged to delegates who cancel less than fifteen days before the course date or who fail to appear for the course.
- Exegesis SDM provides some information on local accommodation: <https://www.esdm.co.uk/where-to-stay> Delegates are responsible for making their own arrangements.