

**Training Catalogue
Training Guide**

**Training Catalogue
(Online Search and Booking Facility)**

**Training Guide
For Administrators**

N.B. Blackboard section under review

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1 Introduction

1.1 Terminology

Because the Training Catalogue provides a service for staff members and students/participants who have complete autonomy to book and cancel off courses; the system is essentially providing a service. In addition it holds the training history of courses, staff members and students.

These staff members and students may be referred to using different terminology. Because this system is providing a service they may be referred to as **customers**. They are or have attended a course so they may be referred to as **attendees** or **delegates**, and because they are or have attended a course, regardless of whether they are staff or students they may be referred to collectively as **students**.

1.2 What is the Training Catalogue?

The Training Catalogue is the online course booking system at The University of Manchester and is available to all staff and students via the appropriate web portals.

1.3 Why do we need it?

Technology has transformed many aspects of modern life, both in and out of the workplace; including the way many of us organise our lives; making hotel or restaurant reservations, booking tickets for a journey or a show; online booking systems make the process fast and easy and there are advantages to the customers and staff dealing with the administration process of the booking.

1.4 What are the advantages?

For training attendees (customers):

With an online booking system for training courses, customers have the freedom of choosing the course(s) they want from the catalogue and knowing precisely what they are getting. They can view course outlines, future training events and dates; any pre-requisites set against the course and where applicable download any resources (guides etc.). Also, because customers conduct their own booking transactions and receive confirmations, they are free to make changes such as cancelling and re-booking courses (within the defined limitations) with a minimum of complicating factors.

For training administration/teaching staff:

Empowering customers to arrange their own course booking significantly reduces the administration associated with course management. Although some moderated courses will require intervention before booking is confirmed, the initial course application and management of available places will be automated thus allowing the administrator/tutor more time to determine suitability of the course requests.

1.5 Important Terminology

The Training Catalogue uses several terms that may be unfamiliar or confusing. Listed in the table below are some of the key identified terms;

Training Catalogue Term	Meaning
Apply	'Apply' on the course booking screens actually means apply for a place on the course
Faculty/School	'Faculty/School' also refers to Directorate and Divisions such as Professional Support Services/IT Services
Student	'Student' refers to any training participant, attendee or delegate and as the Training Catalogue is providing a service, people are often seen as 'customers'
Training Provider	'Training Provider' refers to anyone connected to the delivery of the training service, trainer, tutor, training administrator

2 Using the Training Catalogue

2.1 Accessing the Training Catalogue via

1. Initial access to the Training Catalogue is via the **Staff portal**. This can be found on the **Staff Net** home page which is a rather long way of accessing it, to see how to access through the portal see **page 70** you can however access it very easily via the link below.

<http://app.manchester.ac.uk>

3 The Training Catalogue

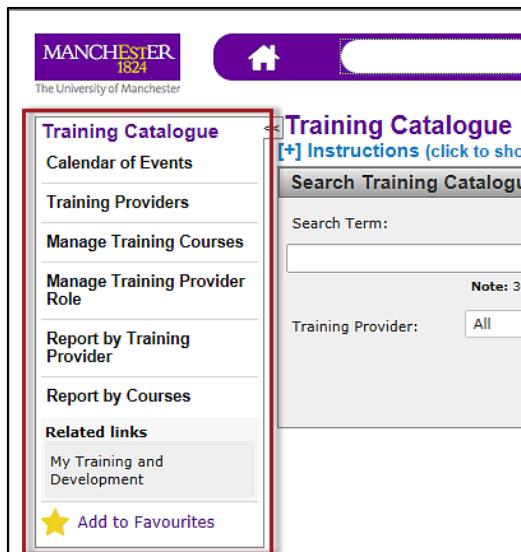
The Training Catalogue provides access to a catalogue of all skills training courses available to staff across the university. The catalogue is searchable by keyword or Faculty and all matching results are linked to the relevant skills training profile.

When booking onto a training event participants make a commitment to:

- Arrive on time for the course
- Attend the course event or workshop for its full duration
- Participate in activities taking place as part of the course
- Undertake any pre-requisite activities as required
- Cancel no later than 1 full working day in advance of an event they can no longer attend

3.1 The Training Catalogue menu

1. On the left hand side of the Training Catalogue home page you are presented with a menu.



The screenshot shows the 'Training Catalogue' menu on the left with a red border around it. The menu items are: Training Catalogue, Calendar of Events, Training Providers, Manage Training Courses, Manage Training Provider Role, Report by Training Provider, Report by Courses, Related links, My Training and Development, and Add to Favourites. To the right of the menu is the main content area with a search form. The search form has a 'Search Term:' input field with a note 'Note: 30' below it, and a 'Training Provider:' dropdown set to 'All'. There is also a 'Go' button at the top right of the search form.

2. These menu options are only available to staff who are given a training provider role within the system (this is explained further in the **Trainer Provider** section from [page 58](#)).
3.).



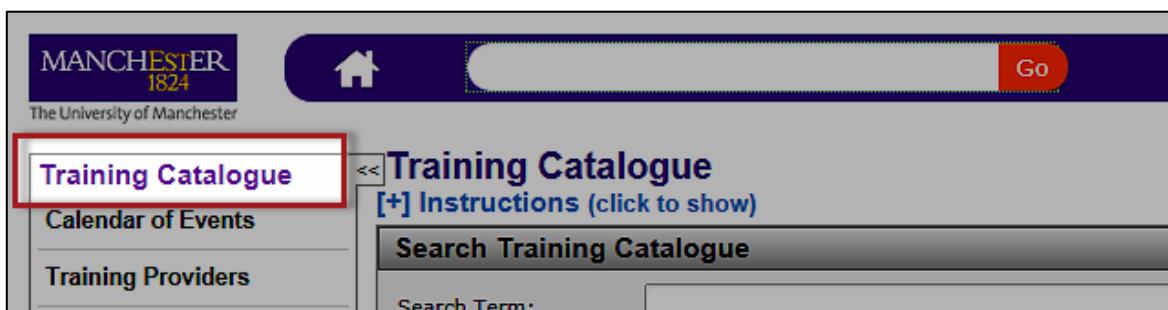
Note: Customers (participants) will only see the first three menu items:

- *Training Catalogue*
- *Calendar of Events*
- *Training Providers*

- The next set of topics will look at each of the menu items and their functionality.

4 Training Catalogue

1. The Training Catalogue page is by default the first screen you see.



The screenshot shows the 'Training Catalogue' menu item highlighted with a red box. The main content area displays the 'Training Catalogue' title and a search form with 'Search Training Catalogue' and 'Search Term:' fields. At the top, there is a navigation bar with the University of Manchester logo and a 'Go' button.

2. The purpose of this page is to search for courses/events using either keywords, selections from drop down lists or a combination of both.

4.1 Searching for a course

1. From the Training Catalogue page simply type the name of the course you wish to search for in the **Search Term** box and click on the **Find** button.

The screenshot shows the 'Search Training Catalogue' page. At the top left is the title 'Training Catalogue' with a back arrow and a link '[+] Instructions (click to show)'. Below the title is a search bar labeled 'Search Term:' containing a red box. A note below the input field says 'Note: 30 characters maximum'. To the right of the search term is a dropdown menu labeled 'Training Provider' with 'All' selected. On the far right are two buttons: 'Advanced >>' and a red 'Find' button with a red arrow pointing to it.

2. In the example below the search term of 'campus' was inserted and has returned several results. This is because the Training Catalogue searches on several levels of content.
3. Results are ordered such that matches on course code are listed first, followed by matches on course title and then matches on course content description, so if the word 'campus' is in the title it will appear at the top of the list, followed by courses that have the word 'campus' in their descriptions/overviews.

The screenshot shows the 'Search Training Catalogue' page after a search for 'campus'. The search term 'campus' is highlighted in a red box in the search input field. The dropdown menu for 'Training Provider' is also highlighted with a red box and has 'All' selected. Below the search form, a message 'Record 1 to 10 of 30' is displayed. A red arrow points from the search input field down to the table of results. The results table has columns 'Code' and 'Title'. The data is as follows:

Code	Title
CCCAA	Campus Solutions Attendance and Absence
CCCCUIP	Course Unit Information Publishing (Campus Solutions)
CCCINT	Introduction to Campus Solutions
CCCPGAC	Campus Solutions PG Academic Admissions



*Please note if a course has been set up to be hidden from search results you may not return a result you were expecting. **Hiding courses is covered in the section on creating courses from page 10.***

4. You can add further search criteria which will restrict the results you return.
5. Retaining the word 'campus' in the screen shot, further additional criteria of Training Provider: **IT Services Division** has been selected.

Search Training Catalogue

Search Term:	campus
Note: 30 characters maximum	
Training Provider:	<input type="button" value="All"/> <input checked="" type="button" value="IT Services Division"/>
All	
Faculty of Engineering and Physical Sciences	
Faculty of Humanities	
Faculty of Life Sciences	
Faculty of Medical and Human Sciences	
Staff Training and Development Unit	
The University of Manchester Library	
Careers and Employability Division	
IT Services Division	
Record 1 to 10 of 30	Code Title
CCCAA	Health and Safety
CCCCUIP	Course Unit Information Publishing (Campus Solutions)
CCCCINT	Introduction to Campus Solutions

6. Click on **Find** to filter the list further.

Search Training Catalogue

Search Term:	campus
Note: 30 characters maximum	
Training Provider:	<input type="button" value="All"/> <input checked="" type="button" value="IT Services Division"/>
All	
Faculty of Engineering and Physical Sciences	
Faculty of Humanities	
Faculty of Life Sciences	
Faculty of Medical and Human Sciences	
Staff Training and Development Unit	
The University of Manchester Library	
Careers and Employability Division	
IT Services Division	
Record 1 to 10 of 15	Code Title
CCCAA	Campus Solutions Attendance and Absence
CCCCUIP	Course Unit Information Publishing (Campus Solutions)
CCCCINT	Introduction to Campus Solutions

7. Alternatively you can remove the search term 'campus' and click on **Find** to return all courses offered by IT Services Division (or whichever Training Provider you choose to search by).

Search Training Catalogue

Search Term:	<input type="text"/>
Note: 30 characters maximum	
Training Provider:	<input type="button" value="All"/> <input checked="" type="button" value="IT Services Division"/>

4.2 Advanced searches

1. You can utilise the **Advanced** button (right hand side) to see the additional [Advanced >>](#)
 - **Mode of Study:** online, Workshop, Face to Face etc.
 - **Event date from:** A calendar option that allows you to select a course start date to search from.

The screenshot shows a search form titled 'Search Training Catalogue'. It includes fields for 'Search Term' (with a note: 'Note: 30 characters maximum'), 'Training Provider' (set to 'IT Services Division'), 'Mode of Study' (set to 'All'), and 'Event date from' (with a calendar icon). The 'Mode of Study' and 'Event date from' fields are highlighted with a red border.

2. Once you have returned your results, click on the course code to see the details of the course.

Record 1 to 10 of 99	
Code	Title
CCCAA	Campus Solutions Attendance and Absence
CCCAC	Academic Advisement
CCCP1	A&P 1 - Gradebook
CCGAP2	A&P 2 - Exam Grids and Re-sits
CCCCC	Course Catalogue & Class Scheduling
CCCUIP	Course Unit Information Publishing (Campus Solutions)

3. As an administrator you will see all of the tabs along the top for the courses owned by *your* organisation i.e courses that have been inputted into the system where the owning organisation is the one you belong to. Whereas a student/applicant will only have access to the **Content** and **Resources** tab.

The screenshot shows a page titled 'Training & Development Profile' for 'CCCAC Academic Advisement'. The top navigation bar includes tabs for 'Content' (which is highlighted in purple), 'Resources', 'Participants', 'Configuration', and 'Manage Custom Email Alerts'. Below the tabs, there's an 'Overview' section with text about the course aims and objectives. At the bottom, there's a list of requirements and a summary of what you will be able to do after the course.

4.3 What are these tabs?

Content

The content tab displays the course outline information that administrators have inserted such as whether the course has pre-requisites, what the course entails and who to contact should there be any questions.

Resources

Allows applicants to download any guides that administrators have uploaded or, follow links to guides that are hosted online via the **Visit Site** link.

Participants

Administrators can view the date/s a course is running, filter to a specific status (confirmed, cancelled etc.) as well as filtering from a specific date.

Configuration

Administrators can set the booking type; un-moderated/moderated as well as determine how the course is delivered; face-to-face/workshop. The number of hours the course runs for can be set and finally who can see this course in the Training Catalogue; staff/students – UG,PG etc.

Manage Custom Email Alerts

Administrators can determine whether a confirmation email is sent when an applicant books on a course, and then whether a reminder email is sent at a later stage and what the body of that email contains.

- Before this guide deals with how to create and look after the administrative aspects of courses within Training Catalogue there now follows a short topic on searching and booking on a course. This helps to give some background information for administrators using Training Catalogue.

4.4 Booking on a course

1. From the **Content** tab where you can see an overview of the course, near the bottom are the details of the mode of delivery, number of hours, whether it is un-moderated or moderated and then a list of events; when this course is taking place, which is accompanied by an **Apply** button.



*Note: Administrators will have an **Edit** button also – allowing you to schedule more training sessions.*

Mode Face To Face	
Training Hours 2.5 training hours	
Online Booking Unmoderated Online Booking	
Events Monday 17/02/2014 9:30 - 12:00, IT Services Training Room 2 (TR2), Kilburn Building	Apply Edit

2. Clicking on **Apply** takes you to the events and apply page where you can do several things;

- a. Select a course date or add yourself to a waiting list – if there are no suitable dates.
- b. Add comments – information such as special requirements or working patterns etc.
- c. Apply.

Apply For Training (Bold Items are required)

Events: Monday 17/02/2014 9:30 - 12:00, IT Services Training Room 2 (TR2), Kilburn Building
 Add me to waiting list

Comments:

Apply **Return To Profile**

The screenshot shows a user interface for applying for training. At the top, it says 'Apply For Training (Bold Items are required)'. Under 'Events', there are two options: a radio button for 'Monday 17/02/2014 9:30 - 12:00, IT Services Training Room 2 (TR2), Kilburn Building' and a checkbox for 'Add me to waiting list'. Under 'Comments', there is a large text input field. At the bottom right, there are three buttons: 'Apply' (with a red starburst effect), 'Return To Profile' (with a red starburst effect), and 'Return To Search' (without a starburst).

3. Beneath the **Apply** button there are two more options;

- **Return To Profile** - takes you back to the course content page.
- **Return To Search** – takes you back to the Training Catalogue search page – this button may say 'Return To Calendar' if you had searched for courses via the calendar of events.



5 Calendar of Events

1. The Calendar of Events allows you to search for training courses and events by provider/week or month.

2. Clicking on an event displayed will take you through to the **Course Content** page where you can undertake all the actions previously described in the **Booking on a course** topic.

Sun		Mon	Tue	Wed	Thu
26	27	CDDOUTMAIL Microsoft Outlook Mail 13:00-15:30	CCCAP2 A&P 2 - Exam Grids and Re-sits 13:30-16:00	CCCCC Course Catalogue & Class Scheduling 09:30-12:00	CDDA7INT Microsoft A Intermedia 10:00-16:

6 Training Providers

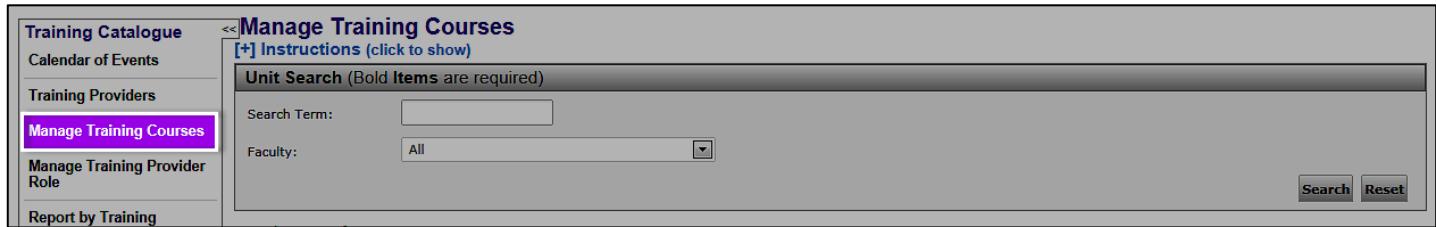
1. This page displays contact details for all training providers who deliver training across the university.

Organisation	Contact Email or Web Site
Faculty of Engineering and Physical Sciences	[Blurred]
Faculty of Humanities	[Blurred]
Faculty of Life Sciences	[Blurred]
Faculty of Medical and Human Sciences	[Blurred]
Library Services	[Blurred]
Careers Service	[Blurred]
Staff Training & Development Unit	[Blurred]
IT Services Training	[Blurred]
IT Services Research Training	[Blurred]
Directorate of Student Experience (Teaching and Learning Support Office)	[Blurred]
NOWGEN, Institute of Human Development, MHS	[Blurred]

7 Course Administration – Administrator access

7.1 Manage Training Courses

1. The **Manage Training Courses** page enables training providers to add and delete courses from the system and edit the core attributes such as Code, Title, Owning Organisations and catalogue visibility.



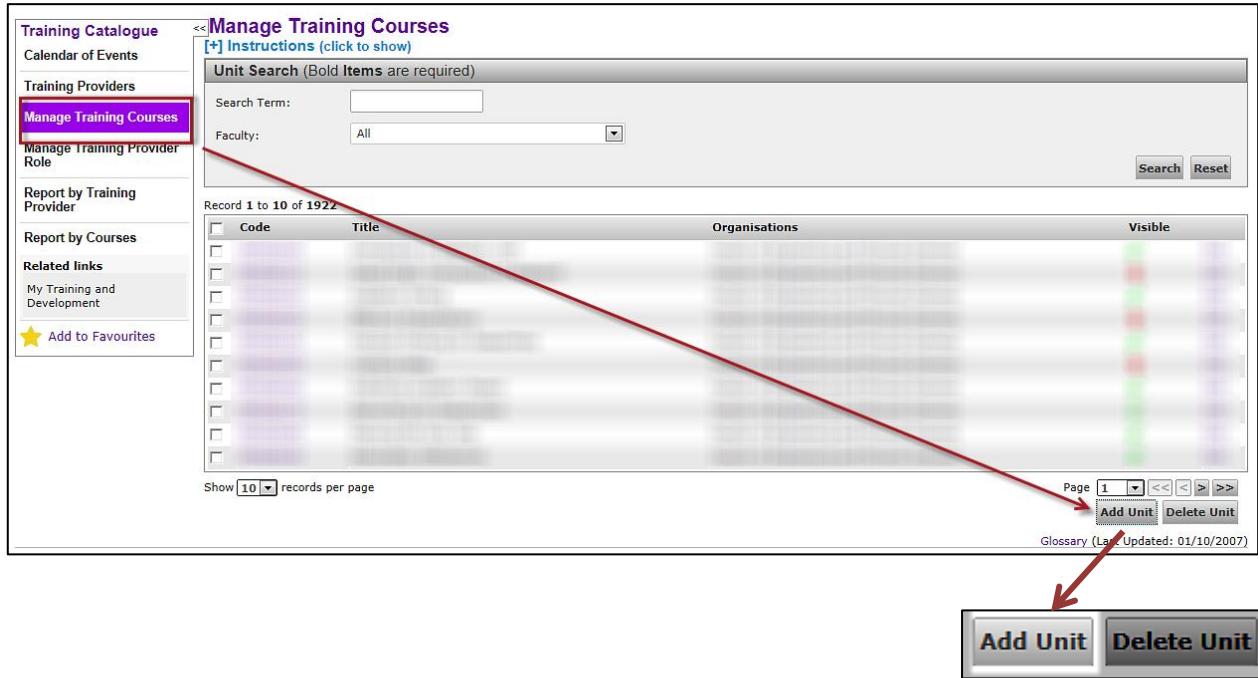
The screenshot shows the 'Manage Training Courses' page. On the left is a vertical menu with 'Manage Training Courses' highlighted in purple. The main area has a title 'Manage Training Courses' with a link '[+] Instructions (click to show)'. Below it is a 'Unit Search' section with bolded required fields: 'Search Term:' and 'Faculty:' (set to 'All'). There are 'Search' and 'Reset' buttons at the bottom right of the search area.



The processes followed for adding a new course are very similar to those followed when editing an existing one. The only difference is that you need to input more information; such as a course code/title and content information etc.

8 Adding a brand new course

1. From the **Manage Training Courses** screen click on the **Add Unit** button.



The screenshot shows the 'Manage Training Courses' page with a red arrow pointing from the left margin towards the 'Add Unit' button at the bottom right of the page. The page includes a sidebar with 'Manage Training Courses' selected, a search bar, a table listing 1 to 10 of 1922 records, and a footer with pagination controls and a glossary link.

2. The **Add Unit** screen has two parts;

- A. This is where you enter your new **Course Code**, **Course Title** and decide if the course is **Hidden** from the search results.

i *Why hide? You may have developed and scheduled a specific course for a particular group of people and you do not want this course to be visible to anyone who logs into the Training Catalogue. Therefore you can hide the course and send the link for the course to the specified people.*

- B. This is where you assign the **Owning Organisation(s)** – who owns the course that is being created. If the course is shared by more than one area, you can click on **Add Additional Organisation** to add them.

Manage Training Courses
[+] Instructions (click to show)

Add Unit (Bold Items are required)

Code:	<input type="text"/>
Title:	<input type="text"/>
Hidden:	<input type="checkbox"/>

Owning Organisations

Organisation:	<input type="text" value="University of Manchester"/>	<input type="button" value="Add Additional Organisation"/>
		<input type="button" value="Add"/> <input type="button" value="Cancel"/>

Owning Organisations

Organisation:	<input type="text" value="University of Manchester"/>	<input type="button" value="▼"/>
University of Manchester University of Manchester Faculty of Engineering and Physical Sciences Faculty of Humanities Faculty of Life Sciences Faculty of Medical and Human Sciences Library and Cultural Institutions Professional Support Services		

3. Once the organisation is selected a further **School** window opens and you can be specific about which school this course belongs to. (You can **Add Additional Organisation** if required).

Owning Organisations

Organisation:	<input type="text" value="Professional Support Services"/>	<input type="button" value="▼"/>
School:	<input type="text" value="All"/>	<input type="button" value="▼"/>
All All Careers and Employability Division Compliance and Risk Office Directorate for the Student Experience Directorate of Human Resources IT Services Division		

4. Once you have entered the required information, click on the **Add** button.

i *Don't forget to tick the **Hidden** box if you do not want this course to be visible in the Training Catalogue.*

Add Unit (**Bold Items** are required)

Code:	CDDWBPK
Title:	Microsoft Word Bespoke
Hidden:	<input type="checkbox"/>
Owning Organisations	
Organisation:	Professional Support Services
School:	IT Services Division
Add Additional Organisation	
Add Cancel	

5. A confirmation message will be displayed informing you that the unit was added successfully.

Manage Training Courses

Unit added successfully.

[+] Instructions (click to show)

Unit Search (**Bold Items** are required)

Search Term:	<input type="text"/>
Faculty:	All

- i** *If you have failed to complete any of the elements of adding a new course the message will inform you that the unit was not successfully added, in this scenario you would need to go through the set up again and ensure everything was completed.*
6. You now need to complete the set-up of your new course. **This initial set up is the same as editing an existing course.**

9 Editing an existing (or new) course

1. Firstly search for the course via the **Manage Training Courses** link in the Training Catalogue menu on the left hand side; enter the required criteria and then click on the **Search** button.

Unit Search (Bold Items are required)	
Search Term:	<input style="width: 150px; border: 1px solid red;" type="text"/>
Faculty:	<input type="button" value="All"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="button"/>
<input style="border: 1px solid red; padding: 2px 10px;" type="button"/> <input style="border: 1px solid grey; padding: 2px 10px;" type="button"/>	

9.1 Editing the Code and Title

Clicking on **Search** will return the code. If you chose to hide the course there will be a red cross in the **Visible** field, if not there will be a green tick. Click on the **Edit** option.

Record 1 to 1 of 1				
	Code	Title	Organisations	Visible
<input type="checkbox"/>	CDDWBPK	Microsoft Word Bespoke	IT Services Division	<input checked="" type="checkbox"/>
Show <input type="button" value="10"/> records per page				
<input style="border: 1px solid grey; padding: 2px 10px;" type="button"/> Page <input type="button" value="1"/> <input style="border: 1px solid grey; padding: 2px 10px;" type="button"/> << <input style="border: 1px solid grey; padding: 2px 10px;" type="button"/> < <input style="border: 1px solid grey; padding: 2px 10px;" type="button"/> > <input style="border: 1px solid grey; padding: 2px 10px;" type="button"/> >>				
<input style="border: 1px solid grey; padding: 2px 10px;" type="button"/> Add Unit <input style="border: 1px solid grey; padding: 2px 10px;" type="button"/> Delete Unit				

On this page you can edit the following;

1. **Course Code and Course Title.**
2. Determine if the course is **Hidden/Visible** within the search results.
3. Assign **Owning Organisations** – Faculty and School.
 - Ensure you do add the School rather than leaving it at just the top level of Organisation as this then enables people from within your School that have administration access to the Training Catalogue system to access and edit this course if necessary.
4. You can also add **Additional Organisations** (if more than one provider shares the course administration).
5. Don't forget to **Save**.

Edit Unit (Bold Items are required)	
Code:	<input type="text" value="CDDWBPK"/> 
Title:	<input type="text" value="Microsoft Word Bespoke"/> 
Hidden:	<input checked="" type="checkbox"/> 
Owning Organisations	
Organisation:	<input type="button" value="Professional Support Services"/> 
School:	<input type="button" value="IT Services Division"/> 
<input style="border: 1px solid grey; padding: 2px 10px;" type="button"/> Add Additional Organisation <input style="border: 1px solid red; padding: 2px 10px;" type="button"/> Save <input style="border: 1px solid grey; padding: 2px 10px;" type="button"/> Cancel	

10 Editing the Course Content

1. Click on the **Course Code**.

Record 1 to 1 of 1			
	Code	Title	Organisations
<input type="checkbox"/>	CDDWBRK	Microsoft Word Bespoke	IT Services Division
Show 10 records per page			

2. On this page you will see several tabs, each one giving access to edit the course **Content**, **Resources**, **Participants**, **Configuration** and **Manage Custom Email Alerts**.

[**<< Training & Development Profile**](#)
CDDWBRK Microsoft Word Bespoke

[Content](#) [Resources](#) [Participants](#) [Configuration](#) [Manage Custom Email Alerts](#)

There are no content details available for this profile.

Online Booking
Online booking is not enabled for this course

Events
No events are scheduled for this course. You can still apply and the training provider will allocate you to an event when one is scheduled.

3. If you are editing an existing course, you will see data in these tabs that you can edit. If it is a brand new course, these tabs will be empty and you will need to insert the necessary data to build the course profile.

10.1 Adding/editing content

1. In the **Content** tab you can add or edit the information presented to potential trainees when they search for a course – information such as what the course entails, any pre-requisites, any extra links that trainees need to follow before booking on the course etc.

[**<< Training & Development Profile**](#)
CDDWBRK Microsoft Word Bespoke

[Content](#) [Resources](#) [Participants](#) [Configuration](#) [Manage Custom Email Alerts](#)

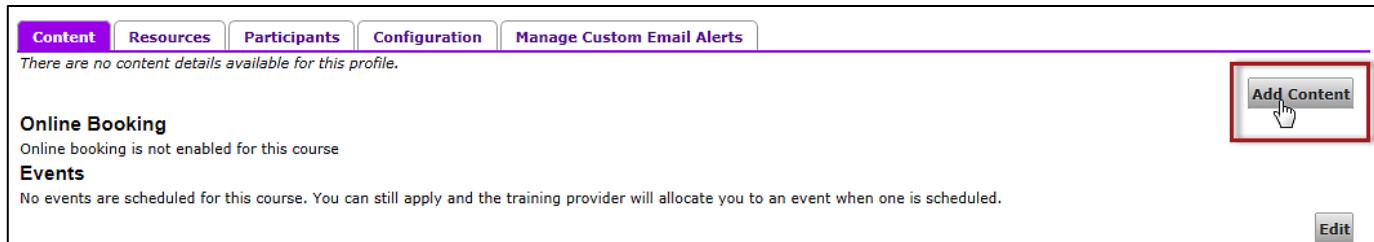
There are no content details available for this profile.

Online Booking
Online booking is not enabled for this course

Events
No events are scheduled for this course. You can still apply and the training provider will allocate you to an event when one is scheduled.

10.2 Adding content

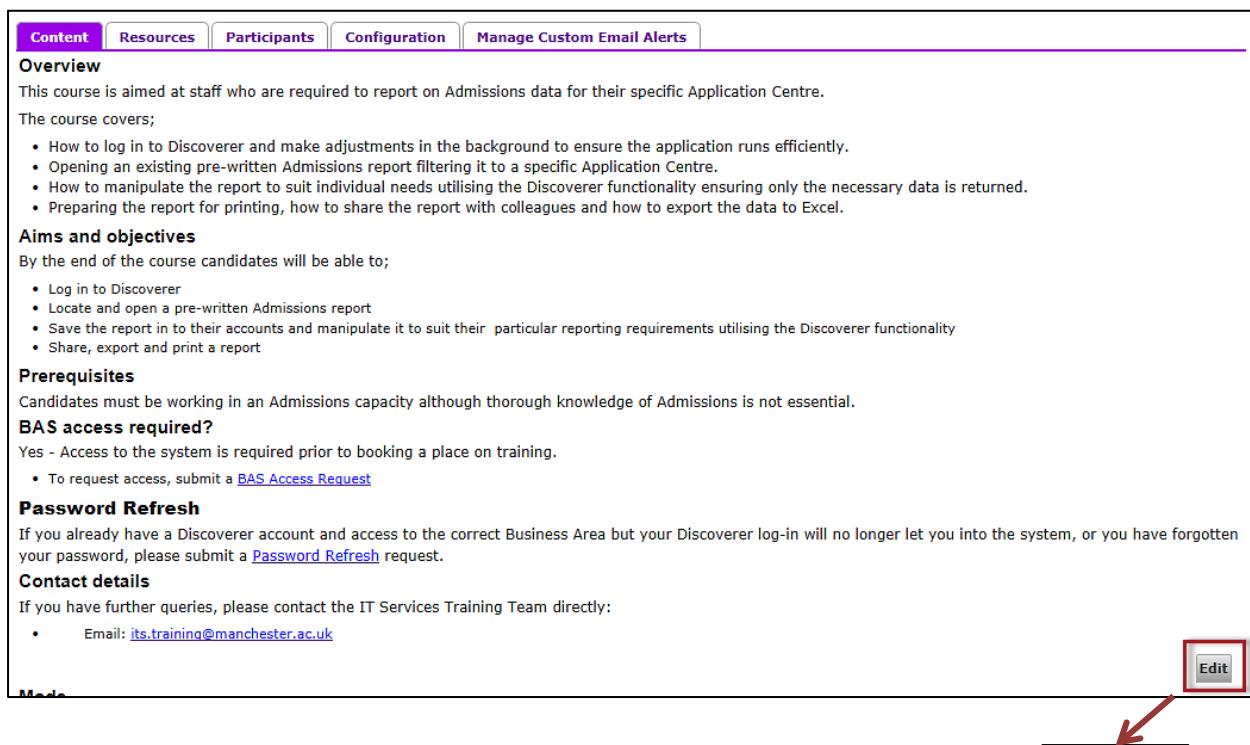
- If this is a new course that you have yet to add any content to you will need to click on the **Add Content** button.



The screenshot shows a navigation bar with tabs: Content, Resources, Participants, Configuration, and Manage Custom Email Alerts. The Content tab is selected. Below the tabs, a message says "There are no content details available for this profile." On the right side, there is a button labeled "Add Content" with a hand cursor icon over it, which is highlighted with a red box. Other sections like Online Booking and Events are also visible.

10.3 Editing content

- If you are editing an existing course you will need to click on the **Edit** button which will appear near the bottom of a screen of text on the right hand side.



The screenshot shows a navigation bar with tabs: Content, Resources, Participants, Configuration, and Manage Custom Email Alerts. The Content tab is selected. Below the tabs, there is a large amount of course overview text. At the bottom right of this text area, there is an "Edit" button with a hand cursor icon over it, which is highlighted with a red box. A red arrow points from the bottom right towards this "Edit" button.



If you are copying and pasting content from one course content page to another, or copying from a Word document, pasting directly into a Content screen can often alter the formatting. To alleviate this problem, copy and paste into Notepad first and then from there copy and paste into the Content page.

10.4 The Content Editor screen

The **Add/Edit** content button opens the **Edit Content** screen.

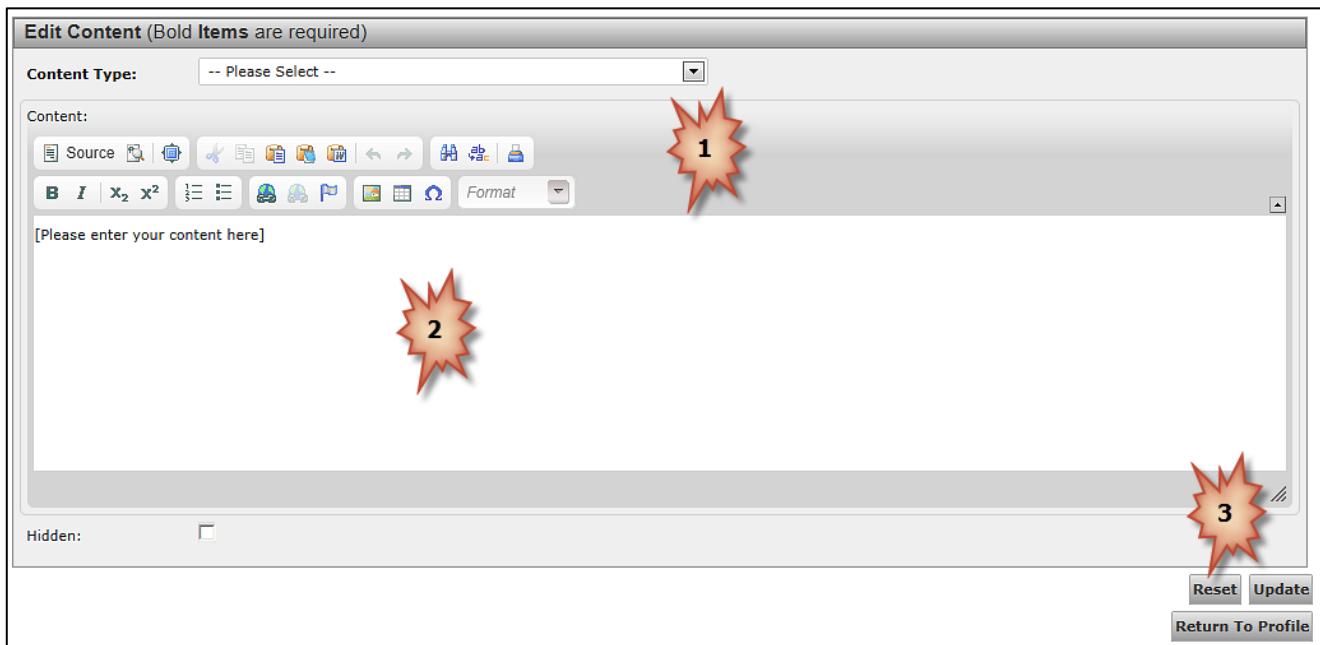
1. **Content Type** and **Content editor** menu – **Content Type** will allow you to decide what content you wish to present and the ability to edit/format it.
2. **Text Area**
3. **Reset** – will clear the changes. **Update** – saves the changes. **Return To Profile** – takes you back to the **Content** page.



Note: if you are editing an existing course there will be text already present and the **Content Type** will have already been selected – often the content type is an **Overview** as people will expect to see an overview of the course content to judge whether it is suitable for them or not.



Please note: if you are adding content on a new course, the **Content Type** will not have been selected. Ensure you do this **before** you start to insert content as doing this after content insertion will result in the content being lost and you will have to re-input it!



2. Insert the content as appropriate – you may have been guided by your manager/colleagues as to how the layout of the content needs to be – such as laid out in sub-headings or bullet points to explain each topic covered in the course.

11 Adding and editing Resources

1. In the **Resources** tab you can upload documents, web links or even link to Blackboard courses.

The screenshot shows the 'Resources' tab selected in a navigation bar. Below it, a section titled 'Resources' displays a message: 'Resources for this unit are shown below.' A sub-section titled 'View Documents' contains fields for 'Subcategory' (set to 'CDDWBPK'), 'Search Term' (an empty input field), and 'Search By' (a dropdown menu set to 'All').

2. There are two sections to the **Resources** tab and everything that you set up here will be visible to the customer when they search for the course.
3. The top half of the screen displays any uploaded documents whilst the bottom half of the screen shows any online resources connected to the course.

➤ In the screen shot below there are no uploaded documents, only on-line resources.

(i) *If uploaded documents have been edited in any way (updated, changed etc.) you would need to return here and manage the documents – replacing them with up to date ones. However, with online resources, once the edit has been made to the resource that is online, there is no need to re-visit here as there is a link directly to that resource (Visit Site).*

The screenshot shows the 'Resources' tab selected in a navigation bar. Below it, a section titled 'Resources' displays a message: 'Resources for this unit are shown below.' A sub-section titled 'View Documents' contains fields for 'Subcategory' (set to 'CCDADM') and 'Search Term' (an empty input field). A 'Find' button is located at the bottom right of this section. Below this, a message says 'Sorry, there are no matching results to display.' A red box highlights the 'On-Line Resources' section. This section lists two items:

Title	Author	Type	Link
Discoverer 10g Guide to using Admissions Reports	[redacted]	Web Link	Visit Site
Discoverer 10g Guide to Printing	[redacted]	Web Link	Visit Site

 Buttons for 'Upload Documents' and 'Manage On-Line Resources' are visible at the bottom right of the 'On-Line Resources' section.

11.1 Uploading documents

1. If you click on the **Upload Documents** button the **Upload Documents** screen opens.
2. You can **Browse** to locate the document you wish to upload, insert an appropriate title, the **Author** window will be populated with your details by default, when you are ready click on **Upload**. Once documents are uploaded you can then utilise the **Manage Documents** button.

Resources for this unit are shown below.

Upload Document (Bold Items are required)

File Location:	<input type="text"/> Browse...
Title:	<input type="text"/>
Author:	Mrs ██████████
Subcategory:	CDDWBPK
Uploaded By:	Mrs ██████████

Upload **Return**

11.2 Uploading on-line resources

1. If you click on the **Upload On-Line Resources** button, the **Edit On-Line Resources** window opens.

Upload On-Line Resources

2. Insert an appropriate **Title**, and the **Author** will be populated with your name – you can change this if you wish. Locate the online resource you wish to upload and copy the Url – paste this into the **Url** field. Choose the Type of on-line resource from the drop down menu, when you are happy with this click on **Upload**.

Edit On-Line Resource (Bold Items are required)

Title:	Microsoft Word Bespoke
Author:	██████████
Url:	http://documents.manchester.ac.uk
Type:	-- Please Select -- -- Please Select -- Movie Web Link Blackboard Course Podcast

Upload **Return**

3. A confirmation message will appear, click on **Continue**.

On-Line Resources

Below is a list of on line resources associated with this course unit. They will include on-line courses, web links, videos and podcasts.

The online resource was successfully saved.

Continue

11.3 Managing on-line resources

1. The online resource is now visible. If you click on the **Manage On-Line Resources** button you can edit it.

On-Line Resources

Below is a list of on line resources associated with this course unit. They will include on-line courses, web links, videos and podcasts.

Title	Author	Type	Link
Microsoft Word Bespoke	[REDACTED]	Web Link	Visit Site

Manage On-Line Resources **Upload On-Line Resources**

2. Each resource will have a **Modify** and **Delete** option and a **Visit Site** link to test the resource is working properly.

On-Line Resources

Below is a list of on line resources associated with this course unit. They will include on-line courses, web links, videos and podcasts.

Modify	Delete	Title	Author	Type	Link
Modify	Delete	Microsoft Word Bespoke	[REDACTED]	Web Link	Visit Site

Upload On-Line Resource **Return**

3. Clicking on **Modify** takes you to the **Edit On-Line Resources** screen again where you can edit the **Title**, **Author**, **Url** and **Type** before clicking on **Upload** when you have completed the modifications.

Edit On-Line Resource (Bold Items are required)

Title:	Microsoft Word Bespoke
Author:	[REDACTED]
Url:	http://documents.manchester.[REDACTED]
Type:	Web Link

Upload **Return**

11.4 Deleting an on-line resource

1. Click on the **Delete** button to remove the resource.

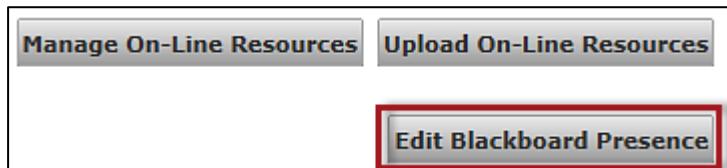
On-Line Resources

Below is a list of on line resources associated with this course unit. They will include on-line courses, web links, videos and podcasts.

Modify	Delete	Title	Author
Modify	Delete	Microsoft Word Bespoke	[REDACTED]

⚠ Please note: If you click **Delete**, it will do so instantly. You will not be prompted again if you are sure you wish to do so and there is no undo function, so you will have to re-upload any documents deleted by accident.

2. Underneath the **Manage** and **Upload On-Line Resources** tab there is an **Edit Blackboard Presence** button.



- The Blackboard integration within Training Catalogue is covered from page 22.

12 Configuration

1. The configuration tab is an extremely important screen when setting up a new course or editing an existing one.

A screenshot of the 'Configuration' tab in the Training Catalogue. It shows fields for 'Booking Type' (set to 'No online booking'), 'Delivery Mode' (set to '-- Please Select --'), and 'Training Hours' (empty). The 'Configuration' tab is highlighted with a purple background.

Booking Type:

A screenshot of the 'Configuration' tab showing the 'Booking Type' dropdown menu. The options listed are 'No online booking', 'Moderated online booking', 'Unmoderated online booking', and 'Face-to-face'. The 'No online booking' option is highlighted with a blue selection bar and a red square box around the 'Delete' icon.

Please note: the **Booking Type** of online is making reference to the ability of participants to book the course via the web and not the nature of the training course.

The nature of the training course is covered in the **Delivery Mode**.

- **No online booking** (participants cannot book online).
- **Moderated online booking** (participants can apply for a place on the course but the course administrator will decide if the place is confirmed or rejected).
- **Un-moderated online booking** (participants can book directly on the course).

Delivery Mode:

- **Online -** Course delivered in an online module.
- **Workshop -** Not necessarily a structured course but classroom based.
- **Lecture -** Self-explanatory.
- **Drop-in -** Non-structured, no set start time.
- **Face-to-face -** Taught training/teaching session.

Delivery Mode:	-- Please Select -- -- Please Select -- Online Workshop Lecture Drop-in Face-to-face
Training Hours:	
Audience:	

(i) *Please note – depending on which organisation you belong to your delivery mode may differ. It is worth consulting with a member of your team before choosing your delivery mode, for example your taught classroom based courses may actually be listed as 'Workshops' rather than 'face-to-face'. Please ensure you clarify this with the appropriate person.*

Training Hours:

- Enter the course duration (2, 2.5, 3 hours etc.) – the training hours you insert in here **are not** updated or linked to the time durations you insert when you set up the dates for the courses in the Content tab.

Audience:

- **Select the intended audience for this training (UG, PGR, PGT, Staff etc.).** Only the selected group of people can see this training in the search results; but, please see the exclamation points below!

Training Hours:	2
Audience:	<input type="checkbox"/> UG <input type="checkbox"/> CEPD <input type="checkbox"/> PGT <input type="checkbox"/> PGR <input checked="" type="checkbox"/> STAFF
Note: Select the intended audience for th	

⚠ *Please note that although the selecting of the audience will stop people from outside that audience base being able to see this course when doing a simple search in the Training Catalogue, if the course link is hosted on a Training Provider website and they navigate to it, they will be able to follow the link and book on, irrespective of whether this course 'should' be available to them to book on.*

⚠ *Similarly, if they are sent the link to the course on the Training Catalogue – the same scenario can occur.*

- To a degree we are reliant on ensuring potential applicants read the overview correctly and any pre-requisites and information on whom the course is aimed at before booking on.

2. Once this information is in place click **Update**.

Screenshot of the 'Update Course Booking Info' configuration page. The 'Configuration' tab is selected. The form includes fields for Booking Type (Unmoderated online booking), Delivery Mode (Face-to-face), Training Hours (2), Audience (UG, CEPD, PGT, PGR, STAFF checked), and a note about selecting intended audience. A red box highlights the 'Update' button.

13 Blackboard integration

1. The bottom half of the screen allows you to enable **Blackboard Integration**.
2. If you would like to deliver your course online via the university's VLE Blackboard check the **Enable Blackboard Integration** box. This will create a template course which will be a template on which all future Blackboard spaces for training events are based.

Screenshot of the 'Blackboard Integration' configuration section. It shows the 'Enable Blackboard Integration' checkbox checked, with a note explaining it creates a space in BB for this course and manages the list of students. A red box highlights the checkbox.

2. You can also add the **Blackboard Course Leader** this will be a tutor or tutors who can build the template course and deliver training for training events.
3. Click on the book icon to open the **Person Picker** box.

Screenshot of the 'Person Picker' box. It shows a note that there are no matching results to display. A red box highlights the book icon used to open the picker.

- Start typing the name you wish to search for and a list of possible matches appears.



- Choose the appropriate person in the list and they will highlight in blue, and then click on **OK** at the bottom of the window and click on **Add Course Leader**.



- You will be informed that the person has been added to the course leader role and you will see who they are, their position and email details.
- You can click on the book icon again and search for further people to add as course leaders. Once you have completed the addition of course leaders click on **Save Changes**.

Blackboard Integration				
Selected person has been added to the Course Leader role for this Unit.				
Enable Blackboard Integration:	<input checked="" type="checkbox"/> <small>Note: Select whether events of this course should be created within the Blackboard system.</small>			
Name	Position	Organisation	Email	<input type="button" value="Save Changes"/>
Training Officer	IT Services Division	@manchester.ac.uk	<input type="button" value="Remove"/>	
Person:	Ed	Mrs	<input type="button" value="Add Course Leader"/>	
<small>Note: Select a person to add to the Course Leader group.</small>				

- Once you have saved the changes the **Remove** link next to a course leader will not appear. To re-enable this link, remove the tick from the **Enable Blackboard Integration** box, **Save Changes** and the link to **Remove** will re-appear.

Blackboard Integration				
Changes have been saved.				
Enable Blackboard Integration:	<input type="checkbox"/> <small>Note: Select whether events of this course should be created within the Blackboard system.</small>			
Name	Position	Organisation	Email	<input type="button" value="Save Changes"/>
Training Officer	IT Services Division	@manchester.ac.uk	<input type="button" value="Remove"/>	

- (i) *Tutors for the course and the Blackboard space have to be entered in the Course Details. Any/all possible tutors for the course must be added here.*
- (i) *Tutors cannot be added event by event. This means that if the course event is delivered by different tutors, any/all tutors will see all course events whether they are delivering or not.*

13.1 Returning to the Resources tab (Blackboard)

1. Click on the **Edit Blackboard Presence** button.



2. If there is no Blackboard presence **This unit does not have a BB Presence** box will be selected.

The screenshot shows a form titled "BlackBoard Presence". Under "BB Presence:", the radio button for "This unit does not have a BB Presence" is selected and highlighted with a red box. Below the form, a note says: "To link to the Resources page for this unit, use the following Url: https://app.manchester.ac.uk/training/profile.aspx?unitid=4942&parentid=183&tab=6". At the bottom right are "Update" and "Return" buttons.

3. If you wish to have a Blackboard presence select the **This unit has a BB Presence** option and click on **Update**.

The screenshot shows the same "BlackBoard Presence" form. Now, the radio button for "This unit has a BB Presence" is selected and highlighted with a red box. A large red arrow points from this button to the "Update" button at the bottom right, which is also highlighted with a red box. The rest of the interface is identical to the previous screenshot.

4. You will be informed that the course materials and eLearning will be delivered to Blackboard and full details will be emailed to you.

The screenshot shows a summary message: "Course materials and eLearning content for this unit will be delivered in Blackboard. Access to Blackboard is via my.manchester.ac.uk, under Teaching and Research, My Courses portlet. Full details will be emailed to you." At the bottom right is an "Edit Blackboard Presence" button.

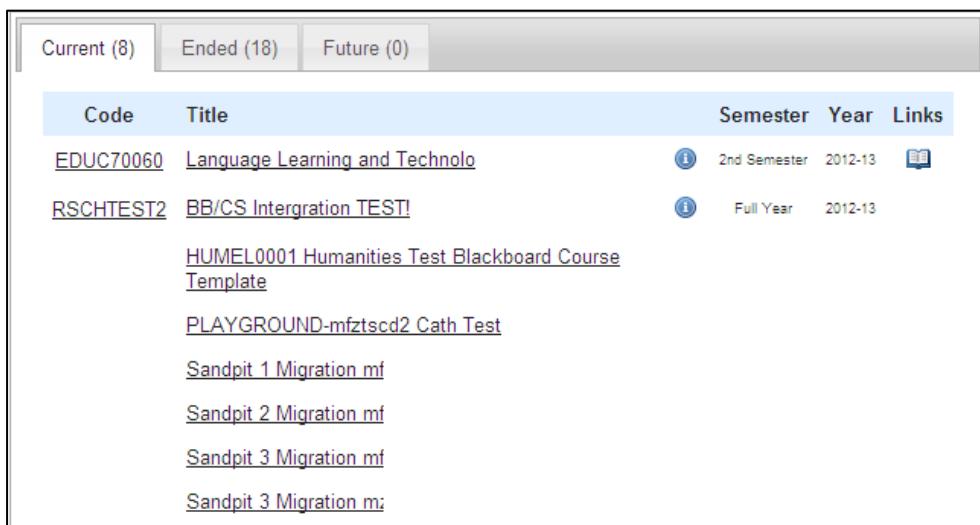
14 Additional instructions for Training Providers/Tutors using Blackboard

1. As a Tutor on a course you will have the Course Leader role in Blackboard.

You will have access to

- Template course – to create a template Blackboard space for you to build your course content
- Training course – a Blackboard space based on the Template course for each training course scheduled
 - **See diagram on Page 28 for how the Training Catalogue integrates with Blackboard.**

1. Create your Training Course in the Training Catalogue.
2. Wait 1 hour (Template creation under normal service takes 1 hour).
3. Go to **My Manchester**, my.manchester.ac.uk, click on **Teaching and Research**
4. In the My Courses portlet, click the **Current** tab, you will see a link to your course ending in the word Template e.g. [HUMEL0001 Humanities Test Blackboard Course Template](#)



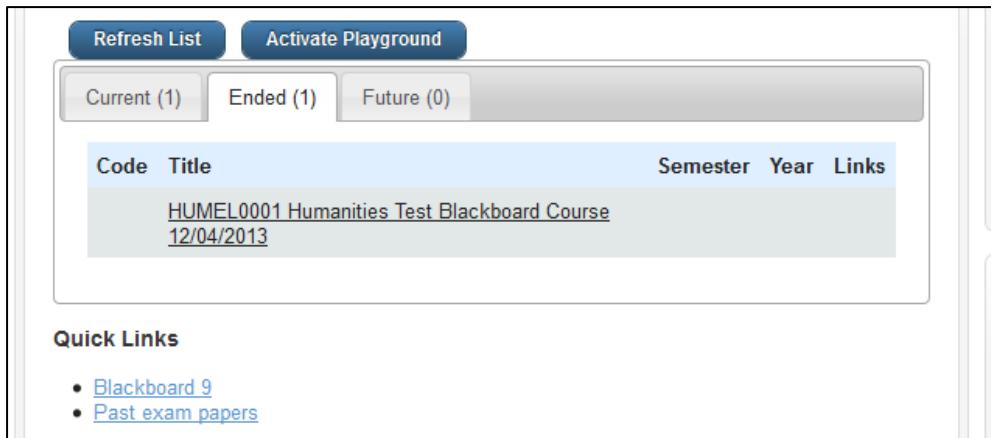
Code	Title	Semester	Year	Links
EDUC70060	Language Learning and Technolo		2nd Semester	2012-13
RSCHTEST2	BB/CS Intergration TEST!		Full Year	2012-13
	HUMEL0001 Humanities Test Blackboard Course Template			
	PLAYGROUND-mfztscd2 Cath Test			
	Sandpit 1 Migration mf			
	Sandpit 2 Migration mf			
	Sandpit 3 Migration mf			
	Sandpit 3 Migration m;			

5. Click on this link to enter the course and build your template Blackboard course as normal. Visit the [Knowledge Base](#) for details on how to build a Blackboard course.

 *Only Tutor enrolments appear in the Template course. No participant / student enrolments will ever appear in the Template course.*

6. Create your Training Event
7. Wait 1 hour (Training course creation under normal service take 1 hour).
8. In the My Courses portlet, click the **Future** tab, you will see a link to your Training course ending with the Start Date of the session scheduled in the Training Catalogue e.g. [HUMEL0001 Humanities Test Blackboard Course 15/04/2013](#)

9. Click the link to enter the course and make any changes relevant to the delivery of the specific course
10. On the start date of the course, the link to the course will move to the **Current** tab
11. On the end date +1 day of the course, the link to the course will move to the **Ended** tab, You will continue to still have access to the course, however you participants will not.



The screenshot shows a web-based application for managing training courses. At the top, there are two blue buttons: 'Refresh List' and 'Activate Playground'. Below them is a navigation bar with three tabs: 'Current (1)', 'Ended (1)', and 'Future (0)'. The 'Ended (1)' tab is currently selected, indicated by a grey background. The main content area has a light blue header row with columns for 'Code', 'Title', 'Semester', 'Year', and 'Links'. Underneath is a single data row: 'HUMEL0001 Humanities Test Blackboard Course' and '12/04/2013'. At the bottom left, there's a section titled 'Quick Links' with two items: 'Blackboard 9' and 'Past exam papers'.

14.1 Additional Blackboard information

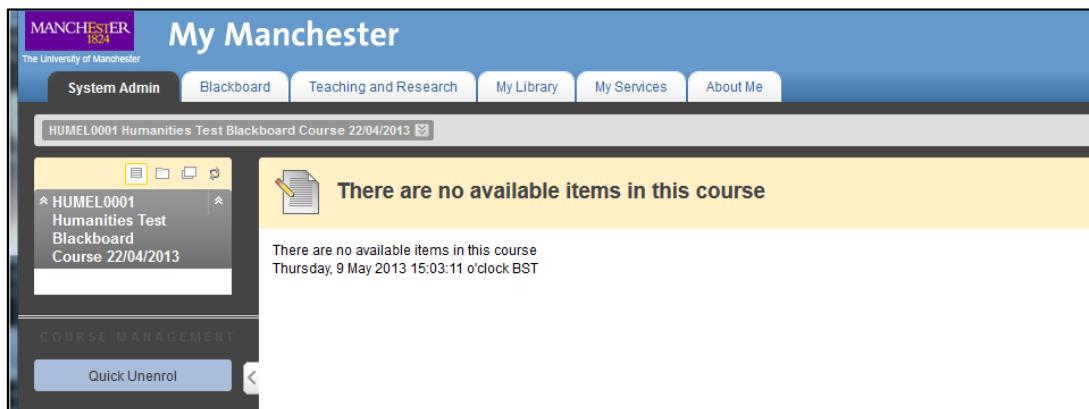
14.2 Access by your participants

Participants who Apply for a course through the Training Booking system will automatically be enrolled on the Training course e.g. [HUMEL0001 Humanities Test Blackboard Course 15/04/2013](#) not the template course.

Participants will see the course from 12.00am midnight on the Start Date of the course event.

Participants' access to the course will end 11:59pm the day after the end of the course and the course link will have moved to **Ended** in My Manchester.

Participants will still be able to view the link; when clicked they will be able to access Blackboard but not view content from the course. See screen shot on the next page.

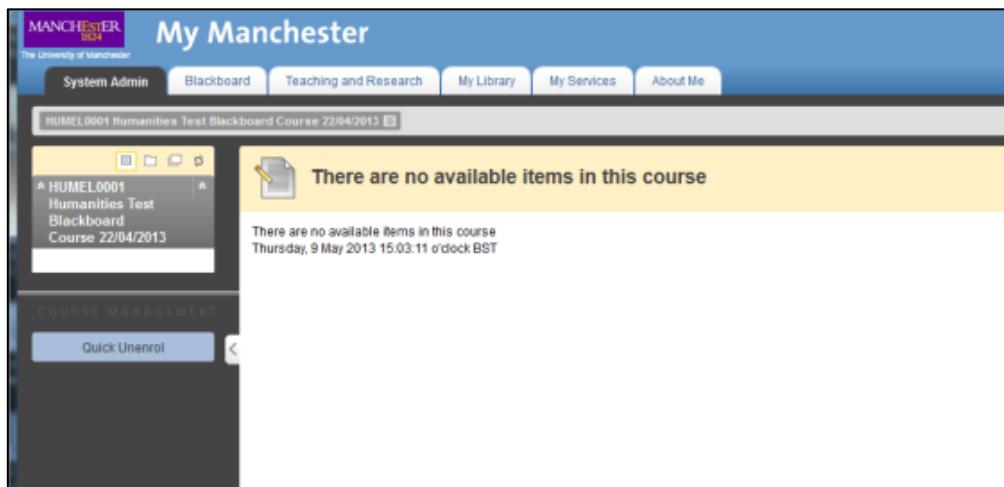


The screenshot shows a participant's view of a Blackboard course page. At the top, there's a blue header bar with the 'MANCHESTER 1824' logo and 'The University of Manchester' text. Below it is a navigation menu with links: 'System Admin', 'Blackboard', 'Teaching and Research', 'My Library', 'My Services', and 'About Me'. A search bar at the top of the page contains the text 'HUMEL0001 Humanities Test Blackboard Course 22/04/2013'. The main content area has a yellow header with the text 'There are no available items in this course'. Below this, a message states 'There are no available items in this course' followed by the date 'Thursday, 9 May 2013 15:03:11 o'clock BST'. On the left side, there's a sidebar with a 'COURSE MANAGEMENT' section containing a 'Quick Unenrol' button.

Participant view of Blackboard Training Course after End Date +1 day

14.3 Additional instructions for Participants where courses are using Blackboard

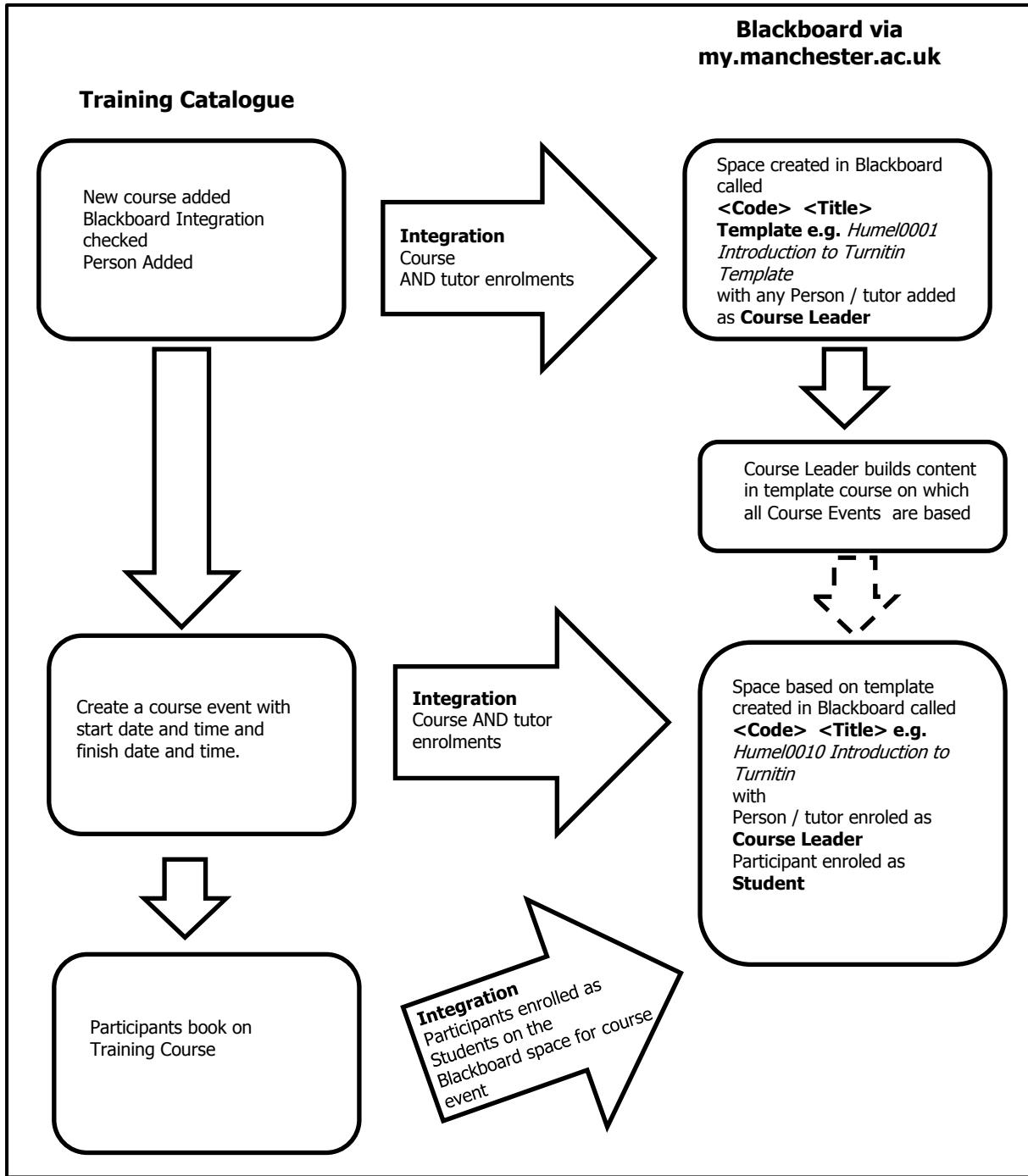
1. Apply for your Training Course
2. If your course uses Blackboard wait 1 hour (Training course creation under normal service take 1 hour).
3. Go to **My Manchester**, my.manchester.ac.uk, click on **Teaching and Research**
4. In the **My Courses** portlet, click the **Future** tab, you will see a link to your Training course ending with the start date of the session scheduled in the Training Catalogue e.g. [HUMEL0001 Humanities Test Blackboard Course 15/04/2013](#). You will be able to enter Blackboard but will not see any content



5. On the start date of your training the course will move to the **Current** tab, when you click the link you will enter the course and be able to view the content
6. Access and use the resources as instructed by your Tutor
7. On the end date + 1 day of your course the link will move to **Ended**, you will be able to access the link but not view content (as above).

14.4 How MWE Training Catalogue integrates with Blackboard

For Training Providers



In Blackboard a Course Leader can;

- Build content i.e. add content /tools including Building Blocks, import content from another course
- Change course settings e.g. set landing page
- View content
- Grade participants work
- Manage groups
- Monitor progress and produce course reports

15 Manage Custom Email Alerts

1. This screen allows you to configure the email alerts that applicants will receive when booking on a course.

Content Resources Participants Configuration **Manage Custom Email Alerts**

Manage Custom Email Alerts

Here you may manage the sending of customised e-mails for training events. Selecting the checkboxes below will cause the system to over-ride any generic email content and send the message text supplied by you in the fields below.

15.1 Switching on/off email alerts

1. The top half of the screen is where you enter the address of the 'sending email', and determine if you want to send auto emails for **Reminders**, **Applications** and **Confirmations**.

Manage Custom Email Alerts

Here you may manage the sending of customised e-mails for training events. Selecting the checkboxes below will cause the system to over-ride any generic email content and send the message text supplied by you in the fields below.

Email Address: **A**
Note: The address that emails should be sent from. This will be the receiver of delivery failure notifications, replies, et cetera.

Reminder: **B**
Note: Send a customised email (supply body below) to registered students seven days before the event is due to take place.

Custom Application:
Note: Send a customised email (supply body below) when user first applies to the training event.

Custom Confirmed:
Note: Send a customised email (supply body below) when a user booking has been confirmed by the Skills Trainer.

Save Settings

A. Email Address: this is the email that will be used to send automatic emails to the applicant.
It is recommended that you use a generic team email if you have one e.g
trainers@manchester.ac.uk

B. Custom alerts:

There are various choices you can make in the **Manage Custom Alerts** section using a combination of ticks against the various email choices and editing the email messages to correspond; see **Email Message Alerts** table on **page 30** and **Editing Email Alerts** topic on **page 31**.

15.2 Email message alerts

Moderated/ Unmoderated course?	Custom Email	Action	Alert
Unmoderated	No emails ticked	Student applies to a course	Automated Confirmation email is sent thanking applicant and giving details of event, time and location
Moderated	No emails ticked	Student applies to a course will show as Pending (has yet to be confirmed by skills trainer)	No emails is sent
		Skills trainer confirms the application	Automated confirmation email is sent thanking applicant and giving details of event, time and location
Unmoderated	Custom Confirmed ticked and Confirmed message is edited	Student applies to course	Custom confirmation email is sent with the text you have inserted
Moderated	Custom Confirmed ticked and Confirmed message edited	Student applies to course	No email is sent
		Skills trainer confirms the application	Custom Confirmation email sent with the text you have inserted
Unmoderated	Custom Confirmed ticked and Confirmed message edited AND Custom Application ticked and Application message edited	Student applies to course	No Custom Application email sent, just the Confirmation email with the text you have inserted - <i>the custom application email is used for moderated courses so that the applicant knows their application has been acknowledged and is being dealt with.</i>
Moderated	Custom Confirmed ticked and Confirmed message edited AND Custom Application ticked and Application message edited	Student applies to course	Custom Application email sent with the text you have inserted (such as thank you for your application – we are dealing with your request)
		Skills trainer confirms application	Custom Confirmation sent with the text you have inserted
N/A	Reminder ticked		Automated Reminder is sent 7 days before the event
N/A	Reminder ticked AND Reminder message edited		Custom Reminder sent 7 days before the event

15.3 Editing Email Alerts

1. The second half of the screen allows you to edit each email **at course level**. This means that you can send bespoke emails for each course (if you leave it ticked and do not edit it a generic message will be generated).
2. Click on the corresponding button to edit the email message.

Reminder Message
 (No custom reminder email message set)

Application Message
 (No custom register email message set)

Confirmed Message
 (No custom confirmation email message set)

3. Enter the required text into the **Email Body** field and click on the **Update** button.

Edit Confirmation Email Message

Email Body: |

Note: The body of the message to be sent.

4. Once you update this custom email you will see the body of the email in the **Manage Custom Email Alerts** window. Any alert that has not had an email set will inform you. The custom email you have inserted can be edited using the **Edit Confirmed Message** button.

Reminder Message
 (No custom reminder email message set) |

Application Message
 (No custom register email message set) |

Confirmed Message
 Dear Colleague

This email is to let you know that this course is quite extensive in its content, and it is imperative that you already have a good working knowledge of Word 2010 as this course will not cover how to navigate around Word, the Ribbon or any of the basic functionality such as opening/closing/saving or basic editing such as changing fonts, colours etc.

If you require training on such topics we would recommend that you attend the Day 1 and Day 2 of the Word courses to ensure your knowledge is up to date.

If you have any questions please contact the IT Team on: its.training@manchester.ac.uk

With best wishes,

IT Training Team

|



Note: You must ensure you have enabled the email in the top half of the screen or your custom email will not be sent.

Custom Confirmed:	<input checked="" type="checkbox"/>
Note:	

16 Participants

1. This screen allows you to see participants who are attached to the course.

Content Resources Participants Configuration Manage Custom Email Alerts

Filter Students

Event: All

Status: All

Start Date:

Note: Display students whose status changed since given date.

Event: 09/01/2014 13:00

Status: All

Start Date:

Record 1 to 5 of 5

Select Name

Confirmed

Cancelled (By Student)

Cancelled (By Trainer)

Attended

Failed To Attend

Pre-registered In CS

Passed

Failed

2. From here you can do several tasks including;

- a. **Filter participants by Event** – showing participants from an individual course date.
- Filter participants by status** – Attended, Cancelled, Confirmed etc.
- Filter all Participants from a defined start date onwards** – this will show participants on more than one course date.

Content Resources Participants Configuration Manage Custom Email Alerts

Filter Students

Event: All

Status: All

Start Date:

Note: Display students whose status changed since given date.

Record 1 to 10 of 377

Select	Name	Event	Status	Status Chg
<input checked="" type="checkbox"/>		02/11/2010	Attended	02/11/2010
<input checked="" type="checkbox"/>		08/12/2011	Attended	09/12/2011
<input checked="" type="checkbox"/>		11/09/2009	Attended	23/09/2009
<input checked="" type="checkbox"/>		27/10/2006	Attended	22/02/2007
<input checked="" type="checkbox"/>		10/04/2008	Attended	10/04/2008
<input checked="" type="checkbox"/>		08/11/2011	Attended	09/11/2011
<input checked="" type="checkbox"/>		12/06/2008	Attended	18/06/2008
<input checked="" type="checkbox"/>		08/11/2011	Attended	09/11/2011
<input checked="" type="checkbox"/>		14/03/2012	Attended	14/03/2012
<input checked="" type="checkbox"/>		09/01/2014	Attended	10/01/2014

Show 10 records per page

Select All:

Page 1 << <> >>

Override Constraints

New Status: None

Update Status Email Selected Print Register Update from Spreadsheet

Export to Spreadsheet

- b. Using the **Select** check box you can perform several functions against the student(s).
- c. You can update a status – Attended, Cancelled etc.*
Send an email to the selected participant(s).
Print a basic course register
Update from a spreadsheet
Export the participant list to a spreadsheet - Please be mindful of data security rules if exporting any information from the Training Catalogue particularly as this data contains SPOT numbers.

➤ Please see page 53 for information on the need for security and encryption.

* Please note at present the statuses that are used frequently in the administration of applicants and participants on courses in the Training Catalogue are;

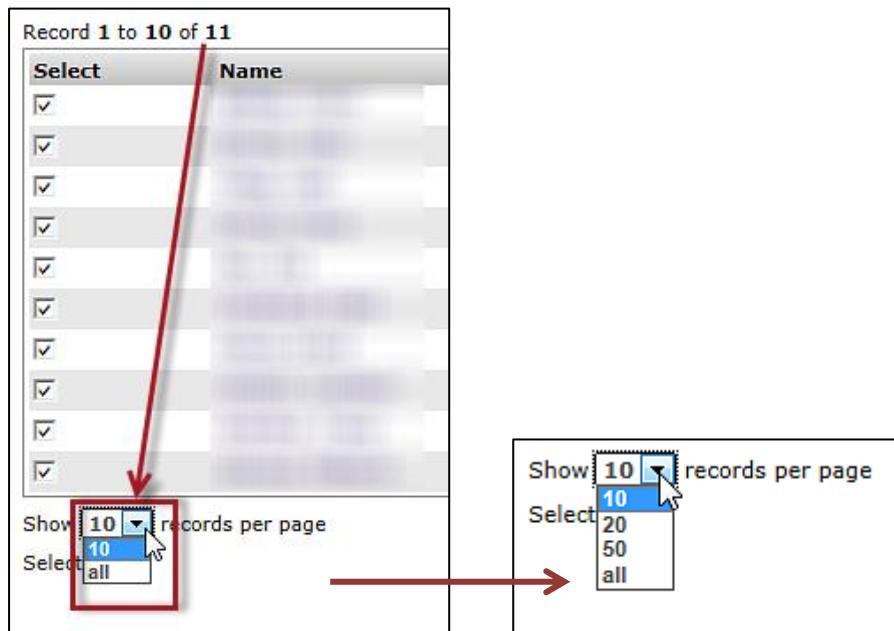
- **Confirmed**
- **CancelledByStudent**
- **CancelledByTrainer**
- **Attended**
- **FailedToAttend**

The other statuses are not currently in use but are present should there be a need for them in the future as the Training Catalogue system evolves;

- **Applied**
- **Rejected**
- **PreRegisteredinCS**
- **Passed**
- **Failed**

16.1 Viewing more records

1. When you have filtered to a specific course/date/status you can only see ten rows of participants. Depending on how many participants there are on a course will determine what options you have in the drop down **Show** menu.



16.2 Selecting participants

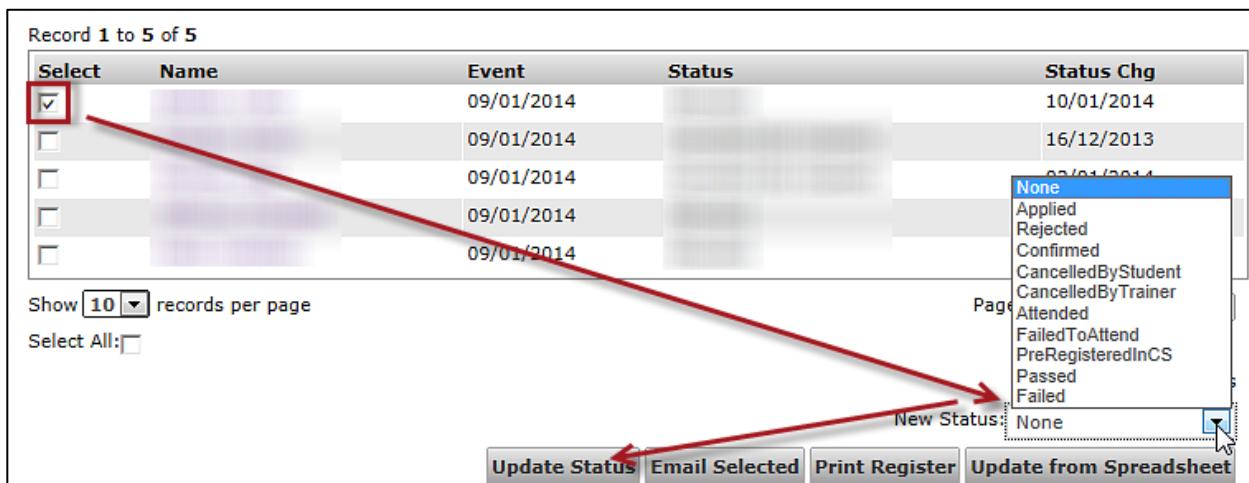
1. Using the **Select** check box you can remove the ticks against all the participants and individually tick the participants you wish to perform a function against, such as change their status(es) or email them etc.



Show 10 records per page
Select All:

16.3 Update participant(s) status

1. Ensure the check box next to the participant(s) is ticked
2. Select the desired **Status** from the drop down menu.
3. Click on **Update Status** to action the change.



Record 1 to 5 of 5

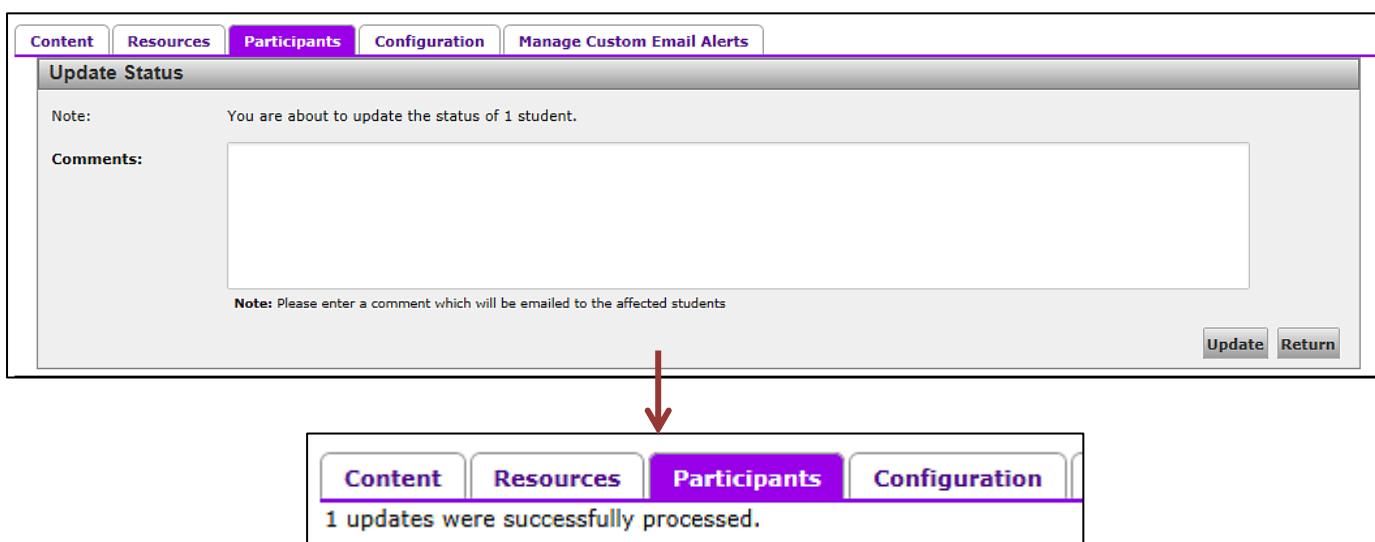
Select	Name	Event	Status	Status Chg
<input checked="" type="checkbox"/>		09/01/2014		10/01/2014
<input type="checkbox"/>		09/01/2014		16/12/2013
<input type="checkbox"/>		09/01/2014		09/01/2014
<input type="checkbox"/>		09/01/2014		09/01/2014
<input type="checkbox"/>		09/01/2014		09/01/2014

Show 10 records per page
Select All:

New Status:

Update Status Email Selected Print Register Update from Spreadsheet

4. You will be warned that you are about to update the status of however many participants you have selected in the tick box – in the screen shot it is 1. Once you click **Update** you will be informed that those updates were successfully processed.



Content Resources Participants Configuration Manage Custom Email Alerts

Note: You are about to update the status of 1 student.

Comments:

Note: Please enter a comment which will be emailed to the affected students

Update Return

Content Resources Participants Configuration

1 updates were successfully processed.

16.4 Emailing a participant

1. Ensure the checkbox next to the participant(s) is ticked.
2. Click on **Email Selected** button.
3. Enter the **Email Subject** and **Content**.
4. **Browse** to locate anything you wish to attach to the email.
5. Click on **Send**.



If you administrate for courses that students attend, please be aware that putting a tick in the **Copy Supervisory** box will mean emailing **all** of the students' supervisory team which could amount to very many people – therefore **DO NOT USE!**

Email Students

Copy Supervisory Team:

Cc:
Note: Separate addresses with a comma, semi-colon or colon

Subject:

Message Body:

Attachment: Browse...
Note: 5 MB max size.

Send **Return**

6. A confirmation of the email is displayed.

Content Resources Participants Configuration Manage Custom Email Alerts

Email has been sent to 1 recipient.

A confirmation message has been sent to you to provide you with a record of your chosen recipients.

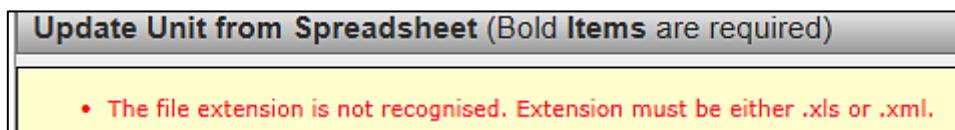
Return **Return To Search**

17 Uploading participants from a spreadsheet

17.1 Excel spreadsheet necessities

It is possible to upload participants on to a course using the **Update from Spreadsheet** option. Ideally the participants (applicants) will have booked on themselves but sometimes it is necessary to circumvent this process either before the course runs or retrospectively.

1. It is imperative that the spreadsheet you use to upload the participants has some specific criteria;
 - a. The sheet you are uploading from is named **Sheet 1**. The Excel spreadsheet that contains it can have any name but the sheet has to be named **Sheet1**.
 - b. The Excel spreadsheet *has* to be saved as an **.xls** File and *not* an **.xlsx** file. If you attempt to upload an **.xlsx** file you will get the error shown in the screen shot.



- c. It *must* have three columns; **SPOT** (with the individuals SPOT ID), **EventDate** (date of the event in the format of dd/mm/yyyy), **Status** (with a status that matches the options, please see the  point below).

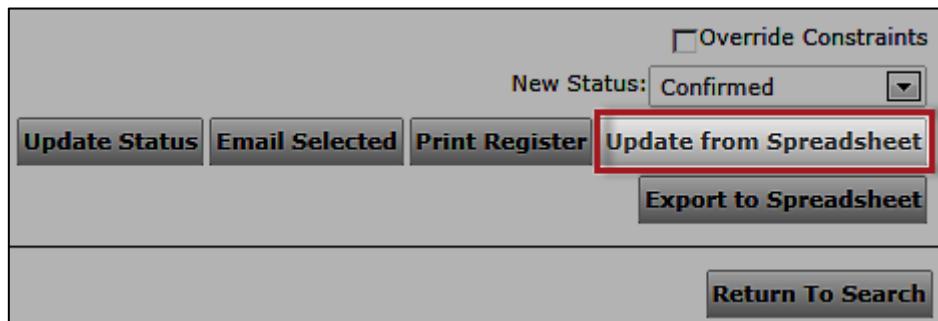
	A	B	C
1	SPOT	EventDate	Status
2		24/01/2014	Registered
3		24/01/2014	Registered
4		24/01/2014	Registered

Uploading tips

- **Please note:** – the most common bulk upload you are likely to do is a batch of people who are attending a course you are running in the future, or people who have attended a course you have already run and you are adding them retrospectively.
-  When people apply for a course and it is unmoderated their status will automatically show as **Confirmed**, however, when you are uploading applicants via an Excel spreadsheet the **Status** needs to be inputted as **Registered** – as in the screen shot above.
- When uploading people retrospectively that have attended the course, the **Status** in the Excel spreadsheet needs to reflect this; **Attended**. You could upload them as **Registered** initially and then manually alter them to **Attended**, however, uploading them as **Registered** is likely to trigger a confirmation email which could cause attendees confusion if they have already attended the course.

17.2 Training Catalogue necessities

1. If there is at least one person already booked to attend a course that you wish to upload more participants using data from an Excel spreadsheet, the process is quite simple, as there is an **Update from Spreadsheet** button visible.



2. However, if nobody has booked (it may be a special course that you are conducting) the **Update from Spreadsheet** button will not be active. You will need to work around this.

A screenshot of the 'Participants' tab in the Training Catalogue. The 'Participants' tab is selected, indicated by a purple background. Above the main content area, there is a navigation bar with tabs: Content, Resources, Participants (selected), Configuration, and Manage Custom Email Alerts. Below the navigation bar is a 'Filter Students' section with fields for Event (02/02/2014 10:00), Status (All), and Start Date (empty). A note below the fields says: 'Note: Display students whose status changed since given date.' A message at the bottom of the filter section says: 'Sorry, there are no matching results to display.' To the right of the filter section is a 'No Update from Spreadsheet button' callout bubble. At the bottom right of the page is a 'Return To Search' button.

17.3 Enabling the Update from Spreadsheet button

1. To enable the **Update from Spreadsheet** button a person needs to be booked on the course and you can use yourself as a candidate. Simply return to the **Content** tab, scroll to the bottom and **Apply** to the appropriate course – you will get the confirmation email etc. Now that you are on the course the necessary buttons will be active.

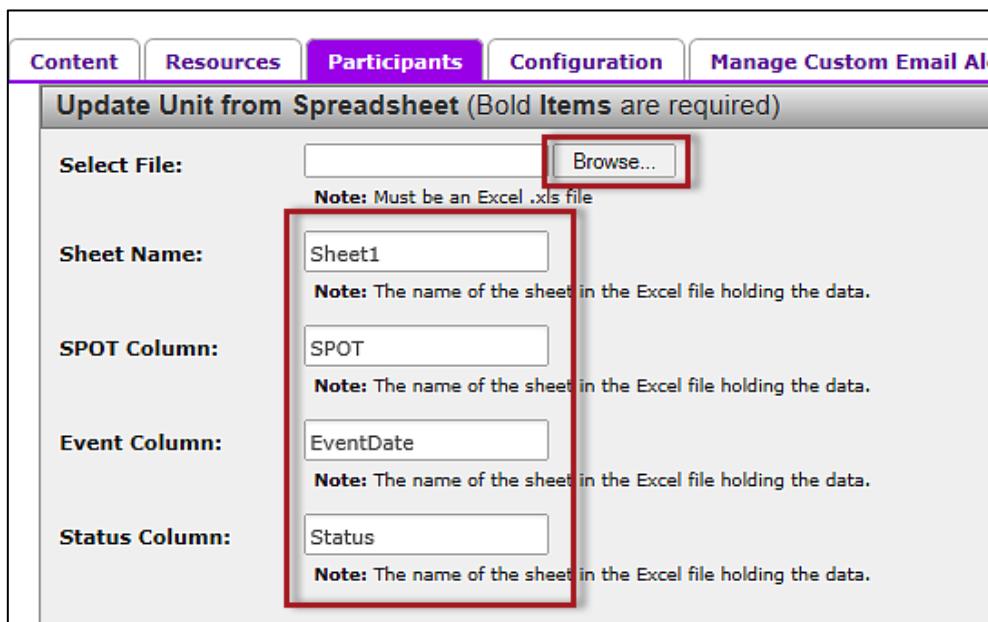
Content

Apply

⚠ Ensure the spreadsheet you are using to upload the participants has the necessary column headers and information inserted, and ensure it remains open (simply minimise it temporarily).

17.4 Uploading participants

1. Click on the **Update from Spreadsheet** button.
2. **Update Unit from Spreadsheet** screen opens with the **Sheet Name**, **SPOT Column**, **Event Column** and **Status Column** already populated with the column headers that you need to ensure reconcile with the Excel spreadsheet. The only field you need to populate is **Select File**.



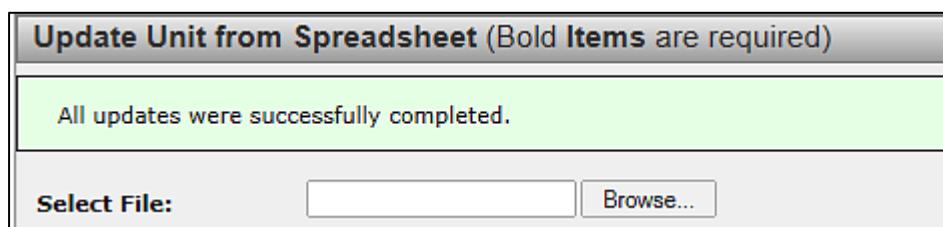
The screenshot shows the 'Participants' tab selected in the top navigation bar. The main title is 'Update Unit from Spreadsheet (Bold Items are required)'. Below it, there are four input fields with notes:

- Select File:** An input field with a 'Browse...' button to its right, which is highlighted with a red box.
- Sheet Name:** An input field containing 'Sheet1' with a note: 'Note: Must be an Excel .xls file'.
- SPOT Column:** An input field containing 'SPOT' with a note: 'Note: The name of the sheet in the Excel file holding the data.'
- Event Column:** An input field containing 'EventDate' with a note: 'Note: The name of the sheet in the Excel file holding the data.'
- Status Column:** An input field containing 'Status' with a note: 'Note: The name of the sheet in the Excel file holding the data.'

3. Click on the **Browse** button, locate your file and double click. Note that in the screenshot the Excel workbook is called **Book1** but the name of the sheet it contains *must* be called **Sheet1**.



4. If the update was successful an **All updates were successfully completed** message opens. If they were not, you will be warned. In this instance you would need to return to the spreadsheet and ensure everything is properly inputted.

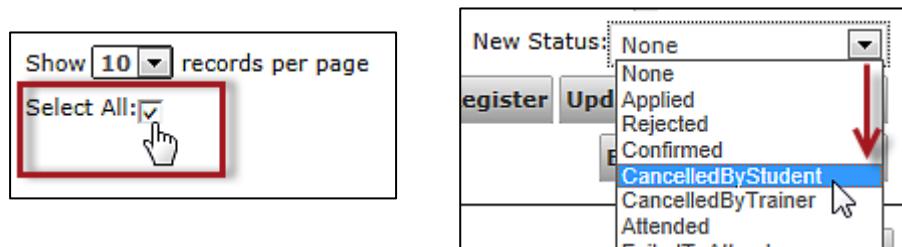


The screenshot shows the 'Participants' tab selected. The main title is 'Update Unit from Spreadsheet (Bold Items are required)'. Below it, a green message box displays 'All updates were successfully completed.' At the bottom, there are two input fields:

- Select File:** An input field with a 'Browse...' button to its right.

5. If you wish to do the same retrospectively with people who *attended* a course, use the same Excel spreadsheet, input the necessary SPOT ID's, the correct date and ensure the **Status is Attended** and follow the same procedure.

i *Don't forget to cancel yourself off the course so that you don't appear – Ensure you tick the **Select All** box (to remove the ticks against all the candidates). Ensure you tick yourself and change your status to **Cancelled by Trainer/Student** (in this instance you are both the trainer and the student so either will be OK).*



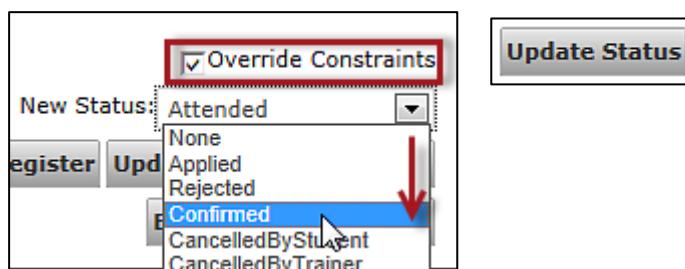
17.5 Status errors

1. If you accidentally upload 'attended' people onto a course that has not yet run (you meant to upload them as **Registered** (confirmed)), the Training Catalogue will recognise the course has not run and although they will show as **Attended**, their status in the system will actually be **Confirmed** and confirmation emails will be sent.

Record 1 to 2 of 2				
Select	Name	Event	Status	Status Chg
<input checked="" type="checkbox"/>	John Doe	01/02/2014	Attended	31/01/2014
<input checked="" type="checkbox"/>	Jane Doe	01/02/2014	Confirmed	31/01/2014

Show 10 records per page
 Select All: Override Constraints
 New Status: Confirmed

2. If you leave the status as 'Attended' even though they are confirmed this could cause confusion after the event when you need to mark the participants' attendance, especially if people have *not* attended and you need to ensure you mark them as such.
3. With a tick against all the attendees you uploaded with an incorrect status ensure you tick the **Override Constraints** box, and from the drop down **New Status** menu choose **Confirmed** before clicking on **Update Status**.



4. You will be warned that you are in **Override Constraints Mode** and that you can transfer the people onto another event for this training course – in that instance you can choose the alternative event from the **Event** drop down menu (especially if you had uploaded them on to the wrong event) or leave it as **Leave on current event** if you are only changing their status.

5. Click on **Continue**.

The screenshot shows a web-based application interface. At the top, there is a navigation bar with tabs: Content, Resources, Participants (which is highlighted in purple), Configuration, and Manage Custom Email Alerts. Below the navigation bar, the main content area has a title 'Transfer Bookings'. A 'WARNING:' message states 'Override Constraints Mode'. A note below it says: 'In 'override constraints' mode you can transfer bookings to any event for this training course.' There is a dropdown menu labeled 'Event:' with the option '[Leave on current event]' selected. At the bottom right of the content area are two buttons: 'Continue' and 'Return', with 'Continue' being highlighted with a red border.

6. Click on **Continue** and a further warning opens informing you of how many people you are going to update and giving you the option to **Suppress Email**.

The screenshot shows a 'Update Status' page. It features a 'WARNING:' message about 'Override Constraints Mode'. A note states: 'In 'override constraints' mode there is only minimal validation of status updates.' Below this, a message says: 'You are about to update the status of 2 students.' There is a checkbox labeled 'Suppress Email:' with a note underneath: 'Note: Tick this box if you do not want an email notification to be sent to the selected student(s.)'. At the bottom right are 'Update' and 'Return' buttons.

7. So as not to cause confusion amongst attendees receiving potentially conflicting emails, it is better to suppress the email before clicking on **Update**.

This is a close-up screenshot of the 'Suppress Email:' section from the previous 'Update Status' page. It shows a checked checkbox with a red border around it. Below the checkbox is a note: 'Note: Tick this box if you do not want an email notification to be sent to the selected student(s.).'

8. Your attendees will now display the correct status.

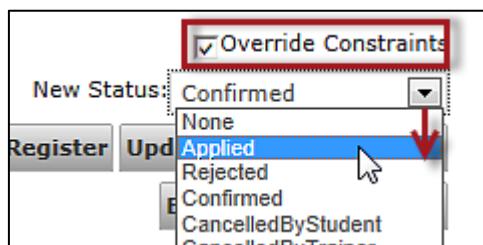
18 Uploading on to a retrospective course

If you are uploading participants from an Excel spreadsheet onto a course that has yet to take place, you can **Apply** to attend the course yourself which ensures the **Update from Spreadsheet** button becomes enabled, however, if you are processing the whole thing – course and upload retrospectively then more steps are required to be followed because you cannot apply for a retrospective course.

Once you have created and configured your course retrospectively you will see that if there are future courses running you will be able to apply for them, but not for the course that has already run – in this instance you will need to make an application as yourself onto a course that is running in the future, and then move yourself onto the historical course via the process covered in the next topic.

19 Moving a student

1. You can move a student from one event to another using the same process as above – ensure the specific student/s you want to move have a tick against them (ensuring those that you do not wish to move do not have a tick).
2. You may be using yourself as a candidate to conduct this process; booking yourself on a future course, to move yourself onto an empty retrospective course so that you can enable the **Update from Spreadsheet** button.
3. Ensure the **Override Constraints** box is ticked and from the **New Status** drop down menu choose **Applied**. Click on **Update Status**.



4. You can then choose the event you wish to move them to and click on **Continue**, you will be reminded of how many people you are updating but there will be no option to suppress the email (this is because you are moving people to a new date and they need to be aware of this!). Finally click on **Update** and then **OK** to complete the move.
5. When you view the event that you have moved the student/s to their statuses will say **Confirmed** (even though you selected **Applied** in the **New Status** drop down menu).
6. If you are conducting this process for a retrospective course then you can use the status of **Attended**.



It might be worth *informing* the people that you are uploading onto the retrospective course that they may receive some erroneous emails during this process and to ignore them.



Having seen the processes that need to be completed for such events it might be worth taking the time to ensure events are set up in the Training Catalogue prior to their scheduled date to eliminate the extra legwork this entails.

20 Event Details Adjustment

There may be a time when you have to make adjustments to an event such as a change of date, time or venue etc. and there may be attendees already booked on to the course that need to be informed of this change.

It might be good courtesy to let these attendees know prior to doing this that there is going to be a change – especially if it is a change of date/time to give them the opportunity to make any arrangements that they need to accommodate this change.

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1. In the **Content** tab, near the bottom under list of events click on the **Edit** button.



2. From the list of events, locate the one you wish to edit and click on the **Edit** link on the right hand side.

Room 2 (TR2), Kilburn Building	10	0	0	1	Edit Delete
Room 2 (TR2), Kilburn Building	10	0	0	1	Edit Delete
Room 1 (TR1), Kilburn Building	10	0	0	1	Edit Delete

3. The individual session will be displayed, click on the **Edit** link on the right hand side.

Sessions		
Start	End	Venue
04/02/2014 13:00	04/02/2014 16:00	IT Services Training Room 1 (TR1), Kilburn Building



4. You can now change the **Start** date, **End** date and **Venue** – once this is done click on the **Update** link on the right hand side.

Sessions		
Start	End	Venue
04/02/2014 13:00	04/02/2014 16:00	IT Services T

[Update](#) [Cancel](#)

5. You will be warned how many people are booked on the course before you **Update**.

Content	Resources	Participants	Configuration	Manage Custom Email Alerts
Edit details of the training event: <ul style="list-style-type: none">• Update the maximum capacity of the event• Add or delete training sessions (events always have at least one session)• Edit details of training sessions				
Edit Training Event (Bold Items are required) Start: 02/03/2014 08:00 Warning: There are students associated with this event (1 registered/attended, 0 applied). If you change any of the sessions you may need to inform the students of the change. Capacity: 10				
Sessions				



6. An email will be sent informing the attendee that a change has been made and stating what the new date/time/venue is.

Subject: IMPORTANT - Change to Training Event
Message inviteUpdate.ics (656 B)
Dear colleague,
It has been necessary to make changes to at least one of the following details of this training event: date, time, or location. We are sorry for any inconvenience this may cause, and hope you can still attend. The updated details are provided below.

21 Deleting an Event – candidates attached

In some circumstances it may be necessary to delete an event that is no longer running/didn't run, so that it does not show up on any reports you may run.

1. Search for the course using your preferred way of locating it. If you search using only part of the course code you may return a number of courses that contain the letters you have inputted.
2. Click on the course.

Record 1 to 1 of 1				
Code	Title	Organisations	Visible	
CDDWTEST	Word Test course	IT Services Division	X	Edit

Show 10 records per page Page 1 << < > >> Add Unit Delete Unit

⚠ If there are people still on the course with a status of Confirmed/Attended you will be warned and the event will not be deleted.

⚠ At this point it is probably worth pointing out that it would make for good practice to ensure you remove participants from a session before attempting to delete it, this will invariably save you a lot of excess administration!

- **If you do still have people on the course the following documents the scenario:**

3. In the **Content** tab of the course, on the bottom right where the dates for the course are displayed, click on the **Edit** button.



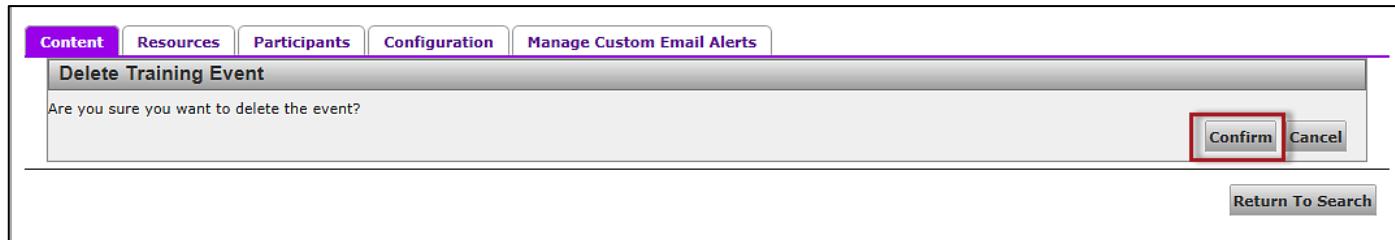
Events	
Saturday 24/05/2014 9:00 - 12:00, IT Services Training Room 20 (TR20), Test Building	Apply Edit
Return To Search	

4. All the events for this course will be listed accompanied by an **Edit** and **Delete** link. Click on **Delete** against the course you wish to remove.

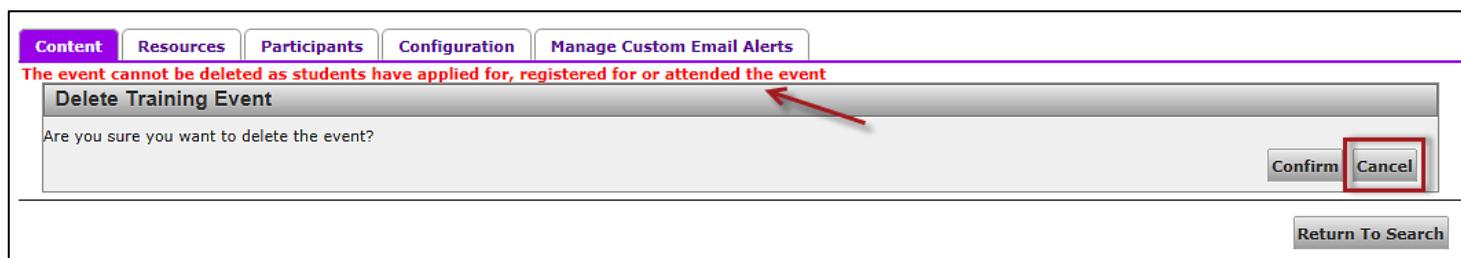
Record 1 to 1 of 1					
Start	Venues	Capacity	Attendees	Applicants	Sessions
24/05/2014 09:00	IT Services Training Room 20 (TR20), Test Building	3	2	0	1

Show 10 records per page Page 1 << < > >> Edit Delete

5. You will be prompted to **Confirm/Cancel** this action. Click on **Confirm**.



6. With people still present on the course you will be warned that the event cannot be deleted.



7. Click on **Cancel** and instead click on **Return to Search** and select the course again. You will need to cancel the participants before you can proceed with the deletion of the event.

Record 1 to 1 of 1		
	Code	Title
	CDDWTEST	Word Te
Show <input type="button" value="10"/> records per page		

22 Deleting an Event – candidates removed

1. Navigate to the **Participants** tab and ensure you cancel the attendees using the **New Status** drop down menu.

A screenshot showing two parts of a web-based application. On the left, a navigation bar has the 'Participants' tab highlighted. Below the navigation bar, the word 'Students' is visible. On the right, a 'New Status' dropdown menu is open. The menu includes an 'Override Constraints' checkbox, a 'None' option, and a list of status options: Applied, Rejected, Confirmed, CancelledByStudent, CancelledByTrainer, Attended, FailedToAttend, PreRegisteredInCS, Passed, and Failed. The 'CancelledByTrainer' option is highlighted with a blue selection bar and a red arrow pointing to it.

2. Click on **Update Status** and in the **Update Status** window you will be warned how many students you are about to update.



3. You can also insert a comment which will be emailed to the participants you are cancelling – this then enables you to explain the reasons behind why they are being cancelled off the course. You may well have already been in contact with the attendees (or you are going to follow up with a more thorough personal email) to give a more detailed explanation.

A screenshot of the 'Update Status' dialog box. It shows a note: 'Note: You are about to update the status of 1 student.' Below it is a 'Comments:' text area with a placeholder: 'Note: Please enter a comment which will be emailed to the affected students'. At the bottom are 'Update' and 'Return' buttons.

4. Click on **Update** and **OK**.



5. Return to the **Content** tab and click on the **Edit** button again at the bottom right hand of the page.



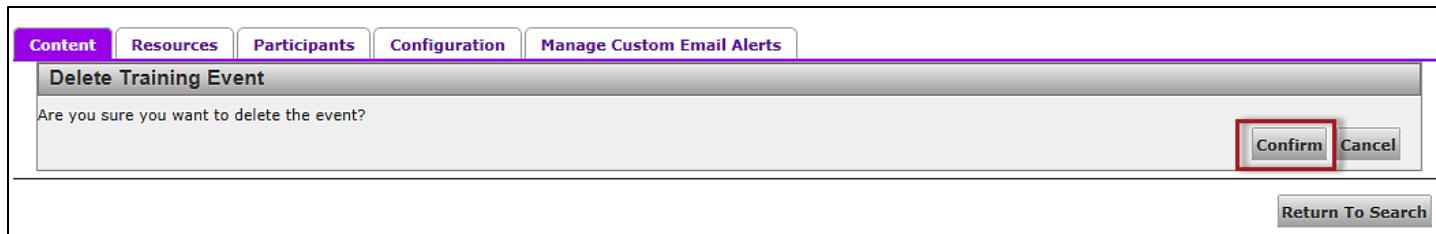
6. When the course is displayed with the accompanying **Edit** and **Delete** options, click on **Delete** again.

Record 1 to 1 of 1

Start	Venues	Capacity	Attendees	Applicants	Sessions	Edit	Delete
24/05/2014 09:00	IT Services Training Room 20 (TR20), Test Building	3	2	0	1		

Show 10 records per page Page 1 << <> >>

7. **Confirm** the deletion.



8. The event will be deleted without error. Your changes will be saved and if it was the only event in the list for that course you will get the message; **Sorry, there are no matching results to display.** You can at this point choose to create more training events under **Add Training Event**.

A screenshot of a web-based application showing a list of training events. At the top, there is a horizontal menu bar with tabs: Content (highlighted in purple), Resources, Participants, Configuration, and Manage Custom Email Alerts. Below the menu, a section titled "Manage events scheduled for this course:" lists the following actions:

- Filter the events shown by start date
- Add additional events
- Click the **Edit** link to manage the sessions that constitute an event
- Events with zero attendees and zero applicants can be deleted

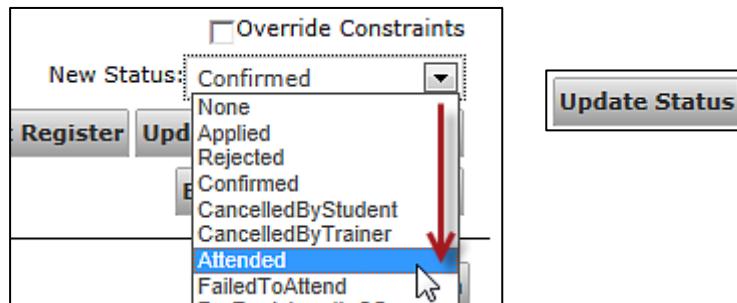
A section titled "Training Events" shows a table with one row. The row contains a "Start Date" column with the value "23/05/2013" and a calendar icon, and a "Note" column with the text "Note: Display events since given date.". Below this table, a message says "Changes saved." and "Sorry, there are no matching results to display." At the bottom of the page is a "Add Training Event" button.

23 Changing Statuses

- Once you have conducted a training course, you want to log whether the attendees came and participated in the course, whether they left half way through or they didn't turn up at all.
- Ideally if an attendee finds they are unable to come to a training session they will have cancelled, however, sometimes the course can slip their mind, they're ill, or other such obstacles can get in the way of a trainee attending and you will need to log this in the Training Catalogue after the event.

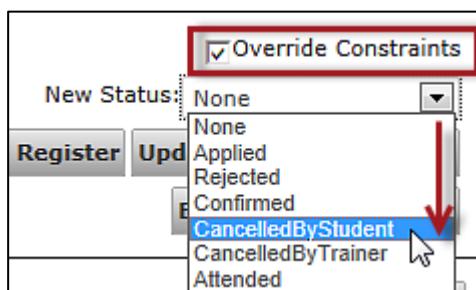
23.1 Marking attendance

1. Ensure the necessary people are accompanied by a tick (remove the ticks against people you wish to log a different status against – such as anybody that did not arrive), and from the drop down **New Status** menu choose **Attended** (there is no need to tick the **Override Constraints** box). Click on **Update Status**. You will be reminded of how many participants you are about to update. **Update** to complete the process.



23.2 Failed to attend and cancellations

1. For anybody that failed to attend – ensure there is a tick against them (remove any ticks against other participants you do not wish to update) and choose the appropriate **New Status** from the drop down menu (**FailedToAttend**).
2. The **Failed To Attend** status generates an automatic email, informing the student that they have been sent this mail because they have been recorded as failing to attend, it also pulls in the course code, date, time and venue. The email also provides them with a link to the **Training Catalogue Contacts and Support** area (as held in the Training Catalogue system) should they need to make contact.
3. A student may contact you before or after the session with apologies and let you know that they can't/couldn't come and rather than making them go to Training Catalogue to cancel their place, whilst you are in the system you may find it easier to process the cancellation yourself.
4. How you choose to cancel the student is up to you.
 - If you cancel them as the student you will not generate an email.
 - If you cancel them as the trainer you will generate an email in which you can add comments. You may not wish to generate an email as this could in turn cause confusion for the student/s – use this option if you do need to cancel a course that has yet to run and inform the attendees of the reason.
5. To cancel the student/s as the student, ensure the ticks are against the participants you wish to cancel, tick the **Override Constraints** box (because you are not the student/s) and from the menu choose **CancelledByStudent**.

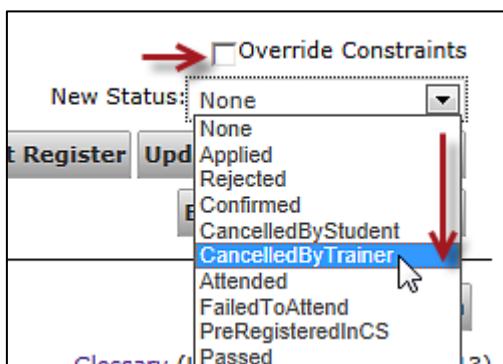


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6. Click on **Update Status** and continue through the reminders of how many people you are updating until you get to **OK**. You will not generate an email for this change of status because you have completed it as if you were the student/s using the **Override Constraints** option.

Select	Name	Event	Status
<input checked="" type="checkbox"/>	[REDACTED]	04/02/2014	Cancelled (By Student)

7. If you choose to cancel a student/s as the trainer you will generate an automatic email in which you can add notes to inform the student/s as to the reason behind the cancellation or any other notes you wish to insert.
8. Ensure the appropriate participants are accompanied by ticks. **You do not need to Override Constraints** because you as the trainer/administrator are doing the cancelling.



9. Click on **Update Status** and the reminder about how many participants you are about to update opens, along with a **Comments** box. Insert any appropriate comments before clicking on **Update** again and **OK**.

Content Resources Participants Configuration Manage Custom Email Alerts

Update Status

Note: You are about to update the status of 1 student.

Comments:

Note: Please enter a comment which will be emailed to the affected students

Insert further information in this box if you need to let the applicants know why you are cancelling

Update **Return**

Return To Search

10. The **Status** will be reflected as appropriate.

<input checked="" type="checkbox"/>	[REDACTED]	04/02/2014	Cancelled (By Trainer)
-------------------------------------	------------	------------	------------------------

24 Print Register

1. When you have filtered to the appropriate course, day and time and you have your list of attendees you can print a register for them to sign in class.
2. From the selection of available buttons click on **Print Register**.

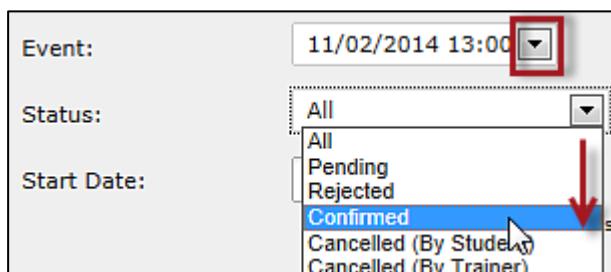


i For the organisations of IT Services Training Team, Staff Training and Development Unit and the Research Computing Team there is a pre-defined system for producing the registers for courses – this is not to say that other organisations use the same process as they may well have their own system in place but for further information regarding this process **please see the topic on page 62**.

25 Exporting to Excel

You can export the data to Excel for creating registers or for use with mail merges etc.

1. Prior to exporting, ensure you have selected the correct **Event**, and the correct **Status** (you may only want to export all the **Confirmed** attendees for example).



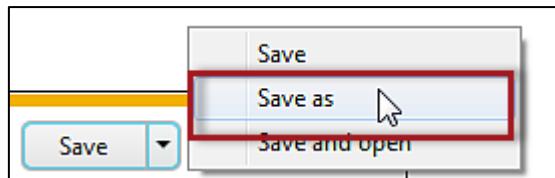
2. Once you have the correct filters in place, click on the **Export to Spreadsheet** button, underneath the list of attendees.



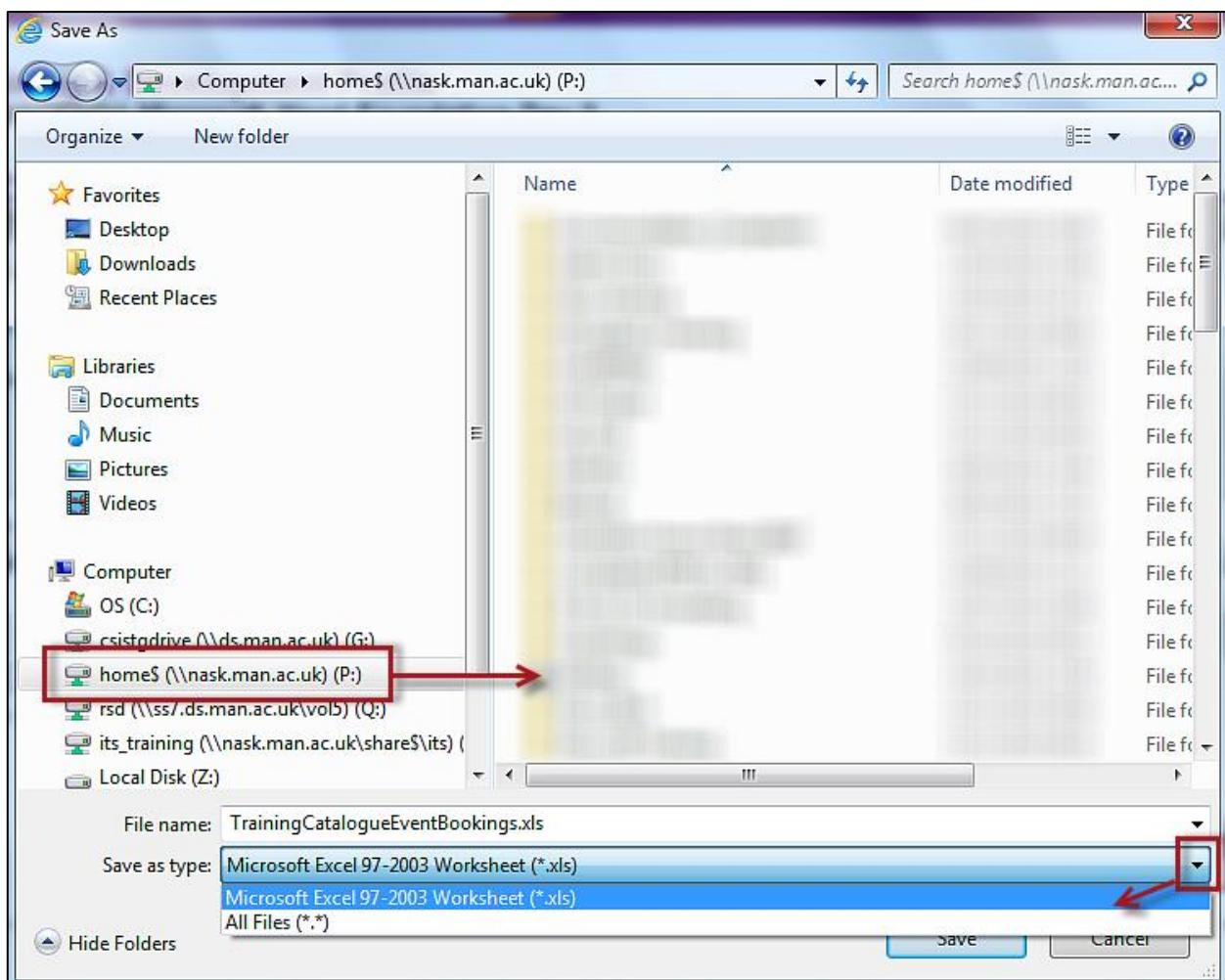
3. An information bar opens at the bottom of the screen asking you what you wish to do with this export. In this instance, to give you more choice over where your exported data goes, click on the arrow next to the **Save** button.



4. From the further menu choose **Save as** which offers you the ability to choose where you wish to save this exported data.

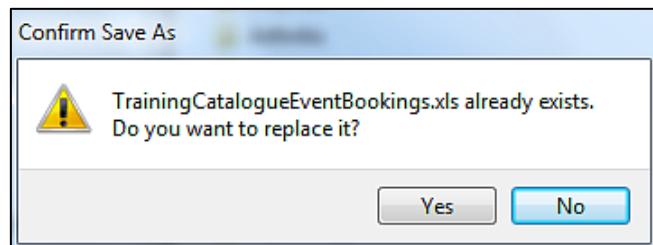


5. The **Save As** dialogue box opens, choose your preferred location – in the screen shot below the **P** drive has been selected.
6. The **File name** is an automatic name generated by the Training Catalogue – you can change this if you wish.
7. The **Save as type** will be populated with **Microsoft Excel 97-2003 Worksheet** and if you expand this menu there will be no other options.



8. Once you are happy with the location click on **Save**.

9. If you have a document in the same location with the same name you will be warned. Depending on whether you wish to overwrite the document (you may well do this on a regular basis with updated information) you can choose to overwrite by clicking on **Yes**, or click on **No** and you will have to re-name it and **Save** again.



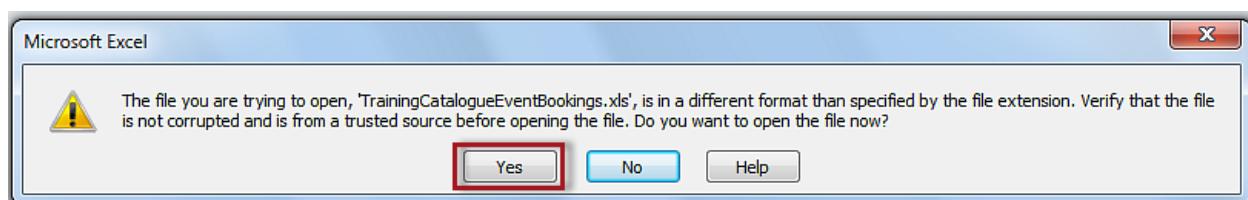
10. The bar at the bottom of the screen will tell you that the download has completed and you can now choose what you wish to do, or you can close this bar with the **x** on the right hand side and view your exported data when you are ready.



⚠ Note if you export any data from the Training Catalogue you must ensure you adhere to the University Data Protection rules. For more information please visit: <http://www.its.manchester.ac.uk/secure-it/datahandling/>
See Encryption topic on page 53.

25.1 Locating and opening your spreadsheet

1. When you locate and open the spreadsheet that has been exported from the Training Catalogue, you will be reminded that the file you are trying to open is in a different format to the file extension – this is something that can be rectified; in this instance say **Yes** you want to open it.



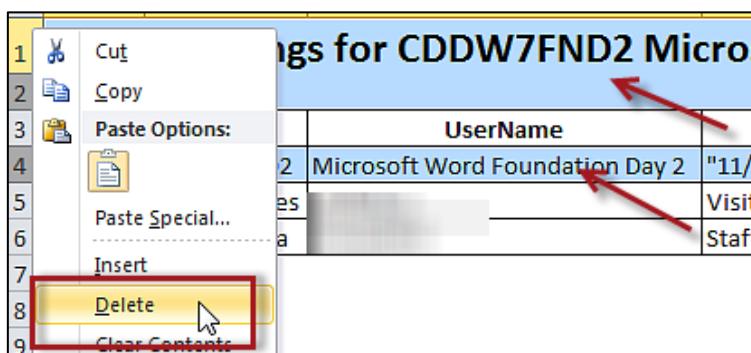
IT Services Training

Training Catalogue – Administrators User Guide

2. The Excel spreadsheet opens and looks slightly odd in its format. The title contains the course code and course name, then there are column headers and the line directly under the column headers contains slightly erroneous data. Followed by the list of attendees.

Event bookings for CDDW7FND2 Microsoft Word Foundation Day 2							
ID	Name	UserName	Job Title	Organisation Unit	Email	Event	Start Date
-1	CDDW7FND2	Microsoft Word Foundation Day 2	"11/02/2014"	"13:00:00"		11/02/2014 13:00	Con
5						11/02/2014 13:00	Con
6							
7							
8							

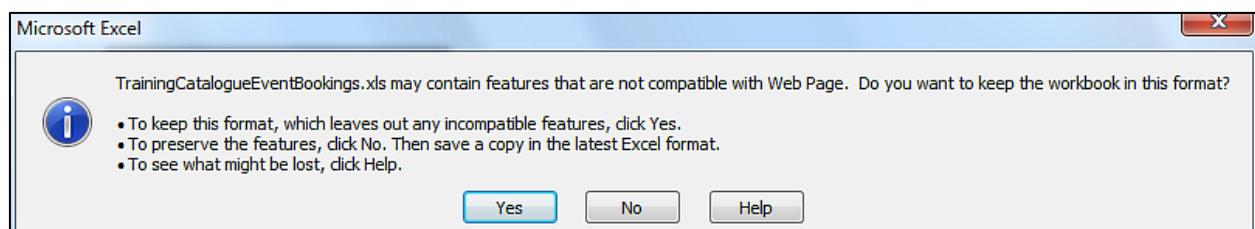
3. Remove any data you do not wish to see especially if you are subsequently using this data for a mail merge.
4. In the screen shot below the heading and the rogue line under the column headers has been highlighted. Take your cursor over the numbers on the left hand side, right click and from the menu choose **Delete**.



5. Your Excel spreadsheet will only display the column headers and the data accordingly.

ID	Name	UserName	Job Title	Organisation Unit	Email	Event	Start Date
-1	CDDW7FND2	Microsoft Word Foundation Day 2	"11/02/2014"	"13:00:00"		11/02/2014 13:00	Con
5						11/02/2014 13:00	Con

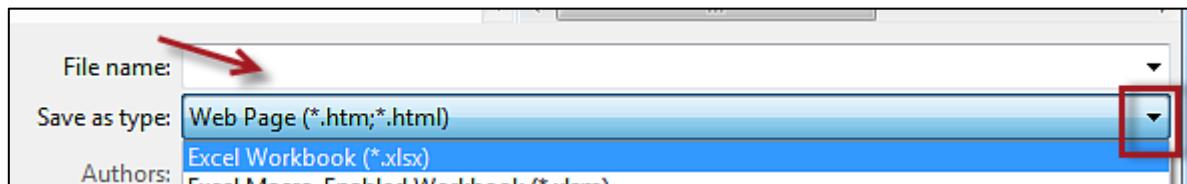
6. If you attempt to save this Excel spreadsheet you will be warned about compatibility. This is because when you export from Training Catalogue into Excel, the format is not Excel but it remains as a web page.



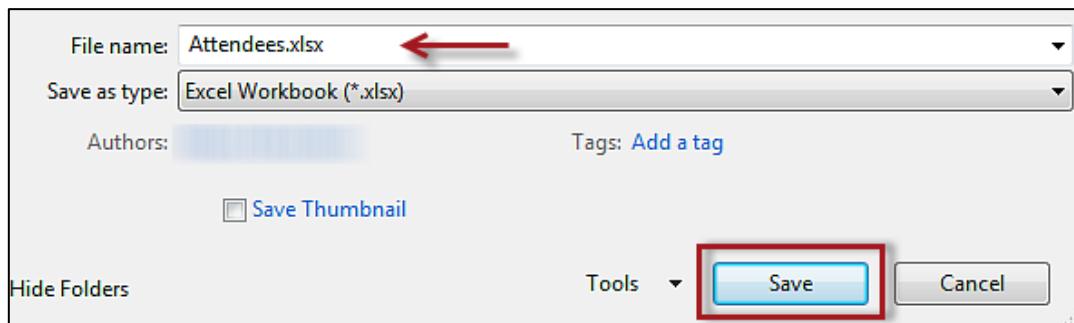
- i** Although you would be able to use this for a mail merge, you would not be able to encrypt it. Therefore it is advisable to save it in an up to date Excel format.

25.2 Converting from html to Excel

7. Click on **No** in the warning dialogue box and the **Save As** dialogue box opens. Insert an appropriate name, drop the **Save as type** menu down and choose an appropriate type such as Excel Workbook (the default will be Web Page).



- i** Don't forget to choose an appropriate location to save it in!



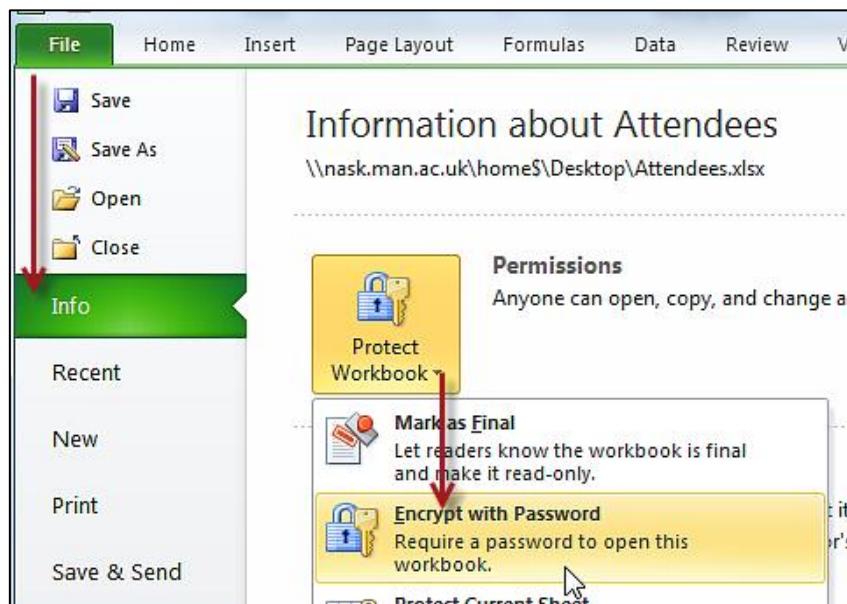
8. In this format you can now utilise it to create mail merges/produce registers and you can also encrypt it – especially if you are going to be transmitting this information in any way.

- i** You do not have to make the edits on the exported sheet immediately, you can choose to close it and re-open it at any time, and then choose **File > Save As** to save it as an Excel format.

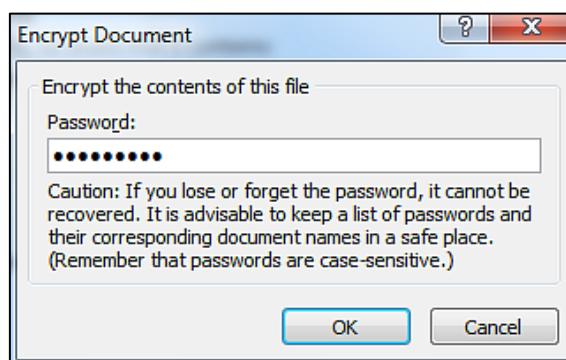
26 Encryption

If you need to email this information to anybody, or you are going to place it on a flash drive for carrying with you to work on in another location it is imperative that you keep this data safe, as it contains people's full names, their SPOT numbers, User ID's location of employment etc.

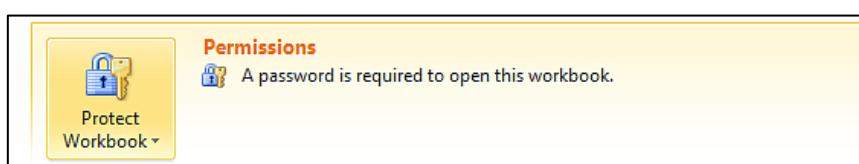
- Whilst the Excel spreadsheet is open, navigate to the **File** tab. Info should be selected by default but if it is not click on it. From the options to the right click on **Protect Workbook** and from the menu choose **Encrypt with Password**.



- Insert a password, making it strong with a mixture of capitals and lower case letters, numbers and symbols. When you click **OK** you will be asked to insert it again.



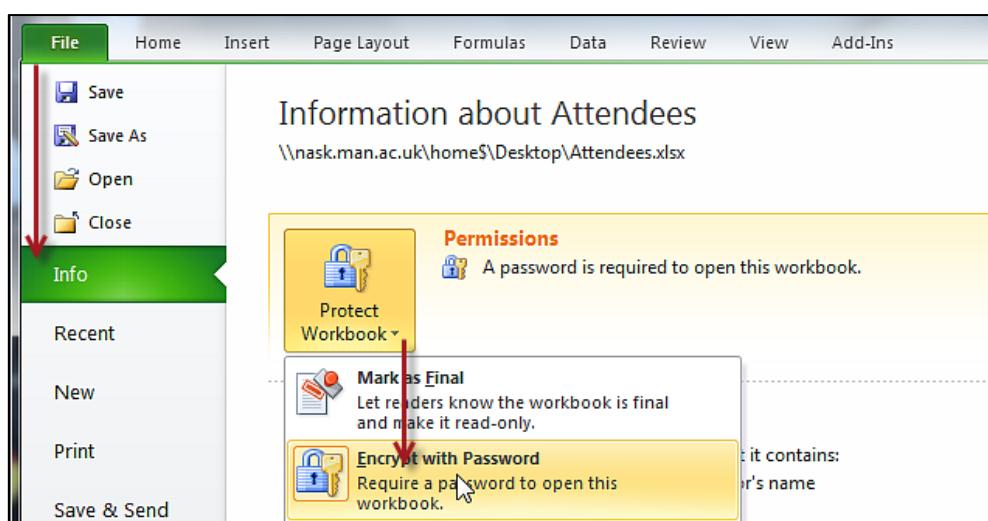
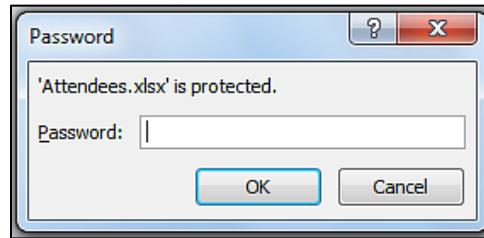
- Once you click **OK** for the second time your Excel spreadsheet will be encrypted.



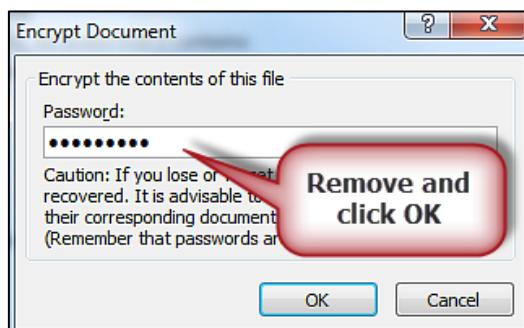
*Remember to **Save** before closing the Excel spreadsheet.*

26.1 Removing encryption

- When you open a file that is encrypted, you will be faced with the **Password** box in which you will need to enter the relevant password correctly to open the file.
- When you exit this spreadsheet it will prompt you to save again and the encryption will remain on the document for the next time.
- If you want to use this document for a mail merge you will need to either open the document, insert the password and minimise it for accessing through the mail merge function, or, if you are going to access it from closed via the mail merge function you will need to de-crypt it.
- Whilst the document is open, navigate to the **File** tab and under the **Info** section you will see that it is encrypted, click on **Protect Workbook** and from the menu click on **Encrypt with Password**.



- The **Encrypt Document** dialogue box opens already populated with the password. Remove the password and click on **OK** and that will immediately de-crypt the document.



Don't forget to re-encrypt it if you need to!

27 Running Reports

1. You can run reports from within the Training Catalogue system filtered to your requirements. In the left hand menu there is a **Report by Courses** link. Clicking on this opens filtering options.

Training Catalogue

Report by Courses

[+] Instructions

Filter Options (Bold Items are required)

Course Codes: eg: THS%, TP62B

From: _____

To: _____

Participant Status: All

Participant Faculty: All

Related links

2. In the **Course Codes** window you can search via part of a code like the example shown using the **%** sign as a place holder for the remainder of the course code, or you can insert the full course code. Separate values with a comma.

Course Codes: eg: THS%, TP62B

3. The **Course Codes** window is not case sensitive. If you do not insert values into the rest of the search fields and click on **Find** you will return a large report for all courses of that code ever run or are scheduled to run and all the people who have attended, or who are already booked to attend a future course and anybody who has ever booked and cancelled.

Filter Options (Bold Items are required)

Course Codes: cddefnd2

From: _____

To: _____

Participant Status: All

Participant Faculty: All

Note: with no restrictions you will return a lot of data

Find

Record 1 to 10 of 351

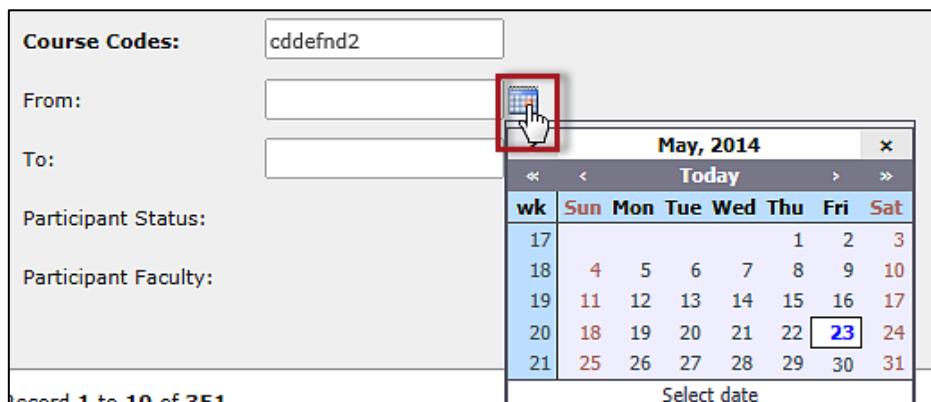
Participant	Position	Date	Code	Title	Status	Level 2 Org	Level 3 Org	Building
		18/06/2012	CDDEFND2	Microsoft Excel Foundation Day 2	Attended	Faculty of Life Sciences	Faculty Office - Life Sciences	Carys Bannister Building
		14/03/2013	CDDEFND2	Microsoft Excel Foundation Day 2	Attended	Professional Support Services	Directorate of Estates	Simon Building
		12/02/2014	CDDEFND2	Microsoft Excel Foundation Day 2	Attended	Faculty of Life Sciences	Faculty Office - Life Sciences	Stopford Building

4. To make your report more useful, make some filtering selections as appropriate.

If you wish to filter between two dates utilise the calendar function to choose a **From** and **To** date.

⚠ Please note: The **Date To must** be the day after the course has completed; for example if a course was running on the 7th April and you wanted to report on everyone who had attended on that date, the **Date From would be 7th April** and the **Date To would be 8th April**.

If a course has multiple events the **Date To** needs to be the day after the last session.



Course Codes: cddefnd2

From:

To: 

Participant Status:

Participant Faculty:

Record 1 to 10 of 351

5. In the example below the course has been chosen, a session running on a specific date has been selected (note the day after has been inserted for the **To** date). The **Participant Status** of **Attended** has been selected but no **Faculty** has been chosen. The report runs against those filters.

Filter Options (Bold Items are required)

Course Codes:	cddefnd2
From:	11/02/2013 
To:	12/02/2013 
Participant Status:	Attended 
Participant Faculty:	All 

Record 1 to 8 of 8

Participant	Position	Date	Code	Title	Status	Le
		11/02/2013	CDDEFND2	Microsoft Excel Foundation Day 2	Attended	Fa
		11/02/2013	CDDEFND2	Microsoft Excel Foundation Day 2	Attended	Pr
		11/02/2013	CDDEFND2	Microsoft Excel Foundation Day 2	Attended	Pr

6. You can export this data accordingly.

Export to Spreadsheet

7. If you wish to run a report on people who are due to attend a session or sessions, ensure you choose the correct period of time in the future and change the Status to Confirmed.

Filter Options (Bold Items are required)

Course Codes:	cddefnd2
From:	01/06/2014 
To:	30/06/2014 
Participant Status:	Confirmed 
Participant Faculty:	All 

8. In addition you can utilise the option to see attended/confirmed etc. from specific Faculties as required.

 For more information on exporting data please see the **Exporting to Excel** topic on **page 49**.

28 Training Providers

The **Manage Training Providers Role** page allows training providers to add and remove people from the training teams they are members of.

Training Catalogue << **Manage Training Provider Role**
[+] Instructions (click to show)

Filter by Organisation

Security Role:	Training Providers
Faculty:	University of Manchester 

Record 1 to 5 of 5

Faculty Training Provider Teams:

- Faculty of Engineering and Physical Sciences.
- Faculty of Humanities.
- Faculty of Life Sciences.
- Faculty of Medical and Human Sciences.

Other University Activities:

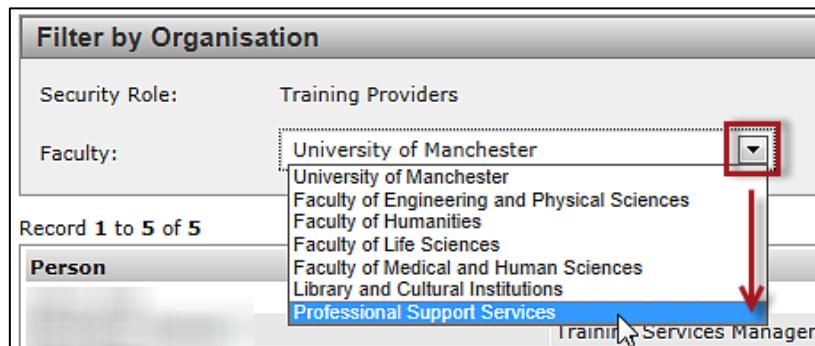
- Library.

Professional Support Services:

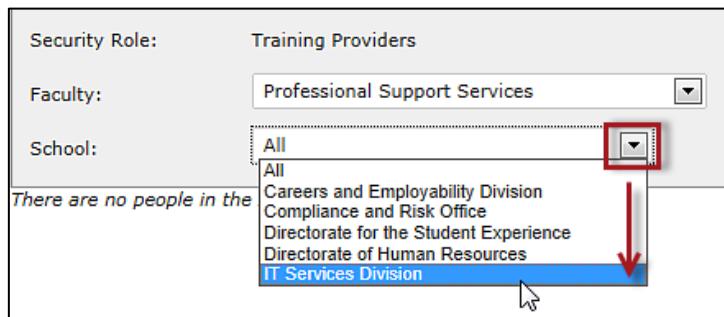
- Careers and Employment Division.
- Compliance and Risk Office.
- Directorate of Human Resources.
- IT Services Division.

28.1 Viewing Training Providers

1. The Faculty will by default be the **University of Manchester** but you can filter this to a specific **Faculty**.



2. Once a **Faculty** is selected the **School** option enables and you can select a **School** from the drop down menu.



3. The members of that group will then be displayed along with their position. You will only be able to see the first 10 members, if there are more, the number of records are displayed on the top, use the **Show** drop down menu and choose **All**.

Security Role: Training Providers
Faculty: Professional Support Services
School: IT Services Division

Record 1 to 10 of 21

Person	Position
	Research Applications & Collaboration
	IS Officer (Scientific Applications)
	Web Services Application Manager
	Training Services Manager
	Training Officer
	IT Trainer & Support Officer
	IT Trainer (Cover)
	Training Officer
	Research Services Librarian
	Administrative Assistant

Show 10 ▾
Add all
Show 10 ▾ records per page

28.2 Adding a Training Provider

1. Underneath the **Filter by Organisation** section there is an **Add Person to Selected Role** and Organisation section. Click on the **Lookup** button.

Add Person to Selected Role and Organisation (Bold Items are required)

Select Person

Person:

2. Start typing the name you wish to search for and a list of possible matches appears.

Person Picker

Name:

Please enter a search term, click on the name of the person to add and then click the OK button.

3. Choose the appropriate person in the list and they will highlight in blue, and then click on **OK** at the bottom of the window.



4. The person will now be added to the **Training Provider Role** for that **Organisation**.

28.3 Remove a Training Provider

1. Filter the Training Provider Group by Faculty/School from the drop down lists to display the members of the group.
2. Click on the corresponding **Remove** link. **Make sure it is for the correct person!**

Filter by Organisation			
Security Role:	Training Providers		
Faculty:	Professional Support Services		
School:	IT Services Division		
Record 1 to 21 of 21			
Person	Position	Organisation	Action
[Redacted]	[Redacted]	PSS.IT Services Division	Remove
[Redacted]	[Redacted]	PSS.IT Services Division	Remove
[Redacted]	[Redacted]	PSS.IT Services Division	Remove
[Redacted]	[Redacted]	PSS.IT Services Division	Remove
[Redacted]	[Redacted]	PSS.IT Services Division	Remove
[Redacted]	[Redacted]	PSS.IT Services Division	Remove
[Redacted]	[Redacted]	PSS.IT Services Division	Remove

3. You will be asked to confirm the removal. Click **Remove** to continue or **Cancel** to abandon.

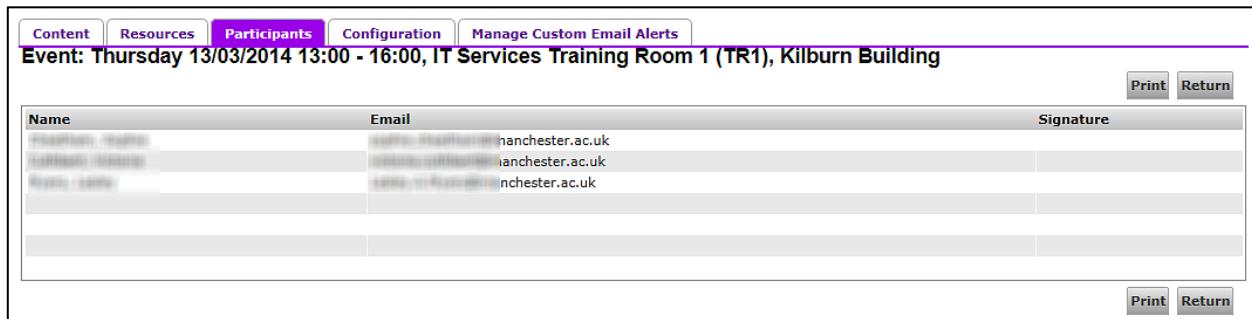
Remove Member from Role	
Are you sure you want to remove [Redacted] from the security role Training Providers for PSS.IT Services Division ?	
Cancel	Remove

4. The training provider will then be removed from the group.

(i) Please note: adding or removing a person from a role for a particular organisation will automatically email details of the change to all members of the specific group.

29 Producing Registers – external to Training Catalogue

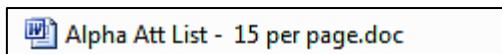
If you use the **Print Register** button in the Training Catalogue, the register on screen looks like the following screen shot, and when printed it will be in portrait format.



Name	Email	Signature
Priscilla - 130314	priscilla.milner@manchester.ac.uk	
Matthew - 130314	matthew.brown@manchester.ac.uk	
Ross - 130314	ross.campbell@manchester.ac.uk	

You may prefer the register to have a particular format as is the case for some departments that use the Training Catalogue system.

1. There is a Word document that has been created containing mail merge place holders that will look to an Excel spreadsheet called **TrainingCatalogueEventBookings.xls** this is the Excel spreadsheet that is produced when the **Export to Spreadsheet** is clicked when viewing participants for a specific course.



2. There will be some initial set up to make the Word document look to the correct Excel spreadsheet but once this is done you can automatically populate the register in the future.

- (i) **If you wish to have a copy of this Word document please contact IT Services Training Team; its.training@manchester.ac.uk**
- (i) **When you have chosen a location to save the Word register, ensure you use the same location to place the exported the Excel spreadsheet from the Training Catalogue system containing the attendees to the course.**

29.1 Exporting the data

1. Locate the course and appropriate date, and ensure you filter the applicants to **Confirmed** before clicking on **Export to Spreadsheet**.

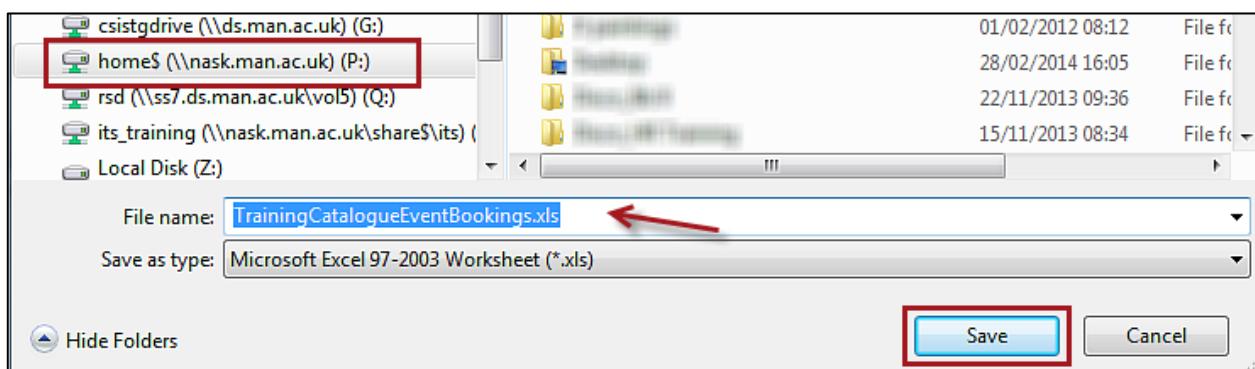


Override Constraints
New Status: **Confirmed**
Update Status **Email Selected** **Print Register** **Update from Spreadsheet** **Export to Spreadsheet**

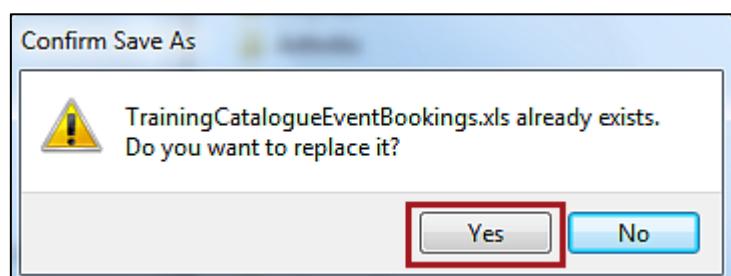
2. The bar opens at the bottom of the screen where you can choose what you wish to do with the spreadsheet. Click on the arrow next to **Save** and choose **Save as**.



3. The **Save As** dialogue box opens. Ensure you choose the same location as the register in Word. In the screen shot this is the **P Drive**. Leave the name as the default and the **Save as type** will be **Excel 97–2003** (there will be no other option). Click on **Save**.

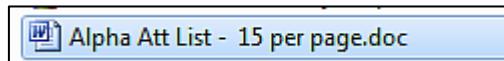


4. If you already have an Excel spreadsheet that you have exported from the Training Catalogue with the same name in this location, you will be warned. If you do not wish to overwrite this existing Excel spreadsheet you will need to click on **No** and re-name the sheet, or, choose a different location. In most cases, because it is being used to produce a register for each new course you will wish to overwrite it so click on **Yes**.

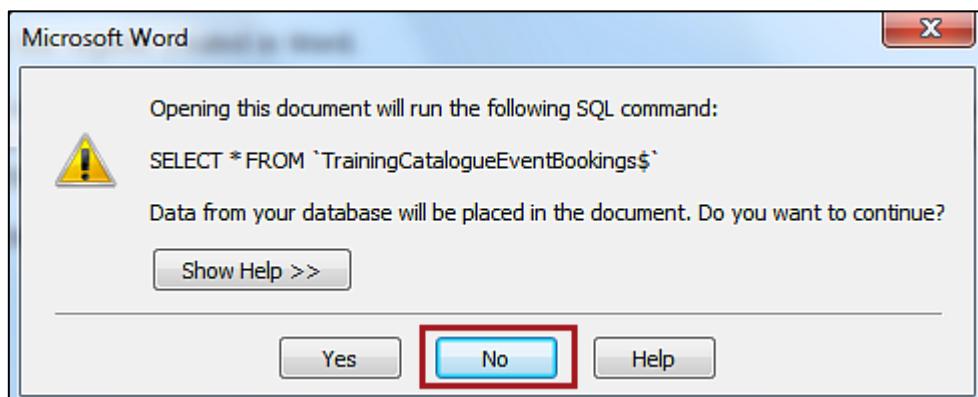


29.2 Opening the Register

1. Locate the register created in Word.
2. If this is the first time you are opening this register you will need to ensure it looks to the correct location of your data source which is the Excel sheet you have just exported from the Training Catalogue.
3. Open the Word document.



4. A dialogue box opens prompting you to make a choice as to what you populate the Word document with, if you are opening this for the first time the default will be the data source that the person who has sent you this Word document last used (it may be IT Services Training Team).
5. You will want to change this and set it up to look at the data source you have exported so click on **No**.



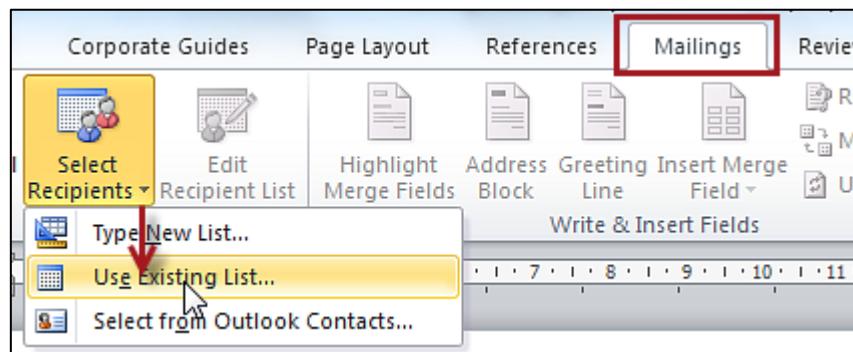
6. The register opens populated with some elements of the last data source that was used; you can now locate the data source you want.

Attendance List – IT Services Training				
Course Code:	«Next Record If»«Next Record If»CDDWINTER			
Course Title:	Microsoft Word Intermediate			
Start Date:	Wednesday, February 19, 2014			
Start Time:	1:00 PM			
By attending this training session you are agreeing to comply with The University of Manchester's Data Protection Policy regarding the access to your personal data.				
Name	Job Title	Organisation	Signature	Date
«Next Record If»«F2»	«F4»	«F5»		
«Next Record»«F2»	«F4»	«F5»		
«Next Record»«F2»	«F4»	«F5»		
	«F4»	—		

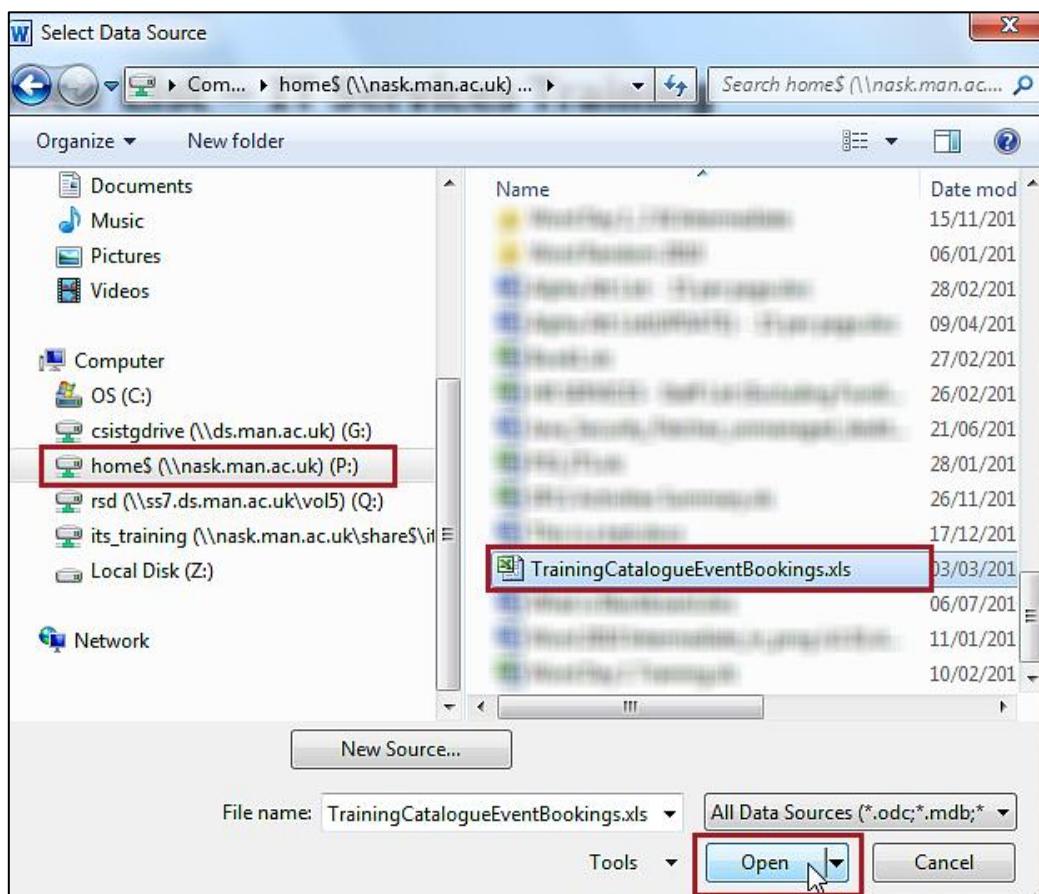
29.3 Locating the data source

- i** If you attempt to open the data source without having opened it already you will encounter an error; the following will document opening the data source and subsequent error.

1. Click on the **Mailings** tab and from the **Start Mail Merge** group click on **Select Recipients**. From the menu select **Use Existing List...**

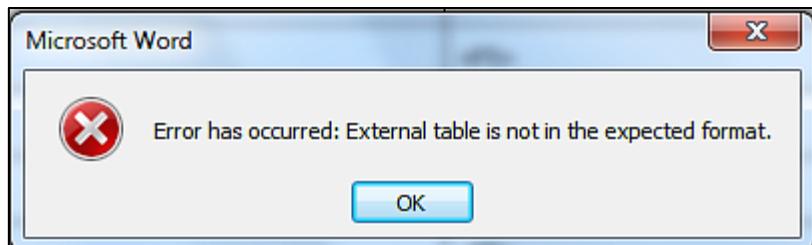


2. The **Select Data Source** dialogue box opens. Choose the location of the Excel spreadsheet and locate it in the window on the right. Either double click on it or click on it once and click on **Open**.

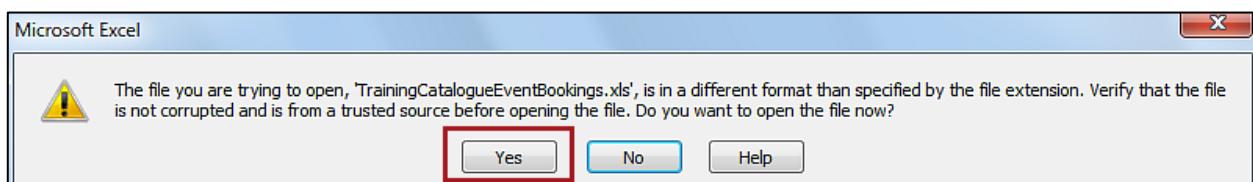


29.4 Opening errors

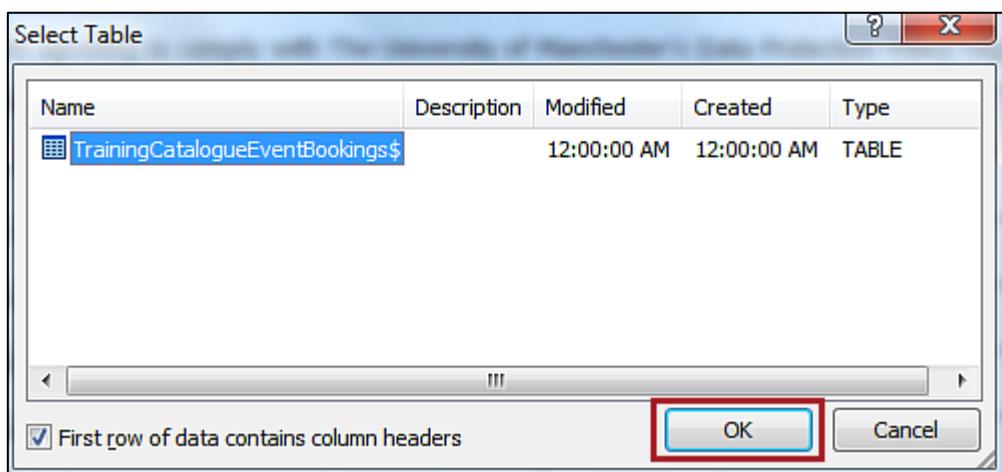
- Without the data source open already you will encounter an error;



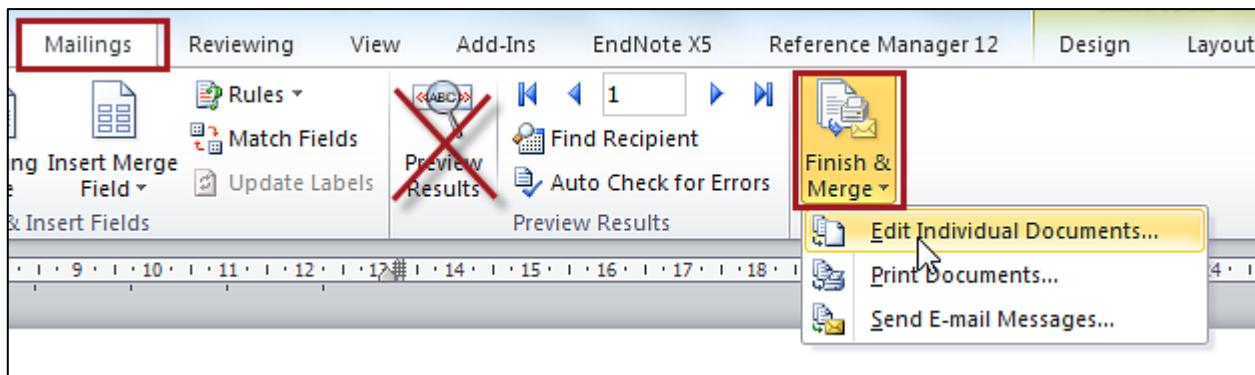
- This is because you need to open the Excel spreadsheet first to accept that the file you are trying to open is in a different format to the file extension.
- Click **OK** on the 'Error has occurred' dialogue box and duly cancel/close all other boxes that subsequently open.
- Locate the exported Excel spreadsheet and open it, the prompt is warning you that the file is in a different format to the file extension and asking you if you wish to open it. Click on **Yes**.



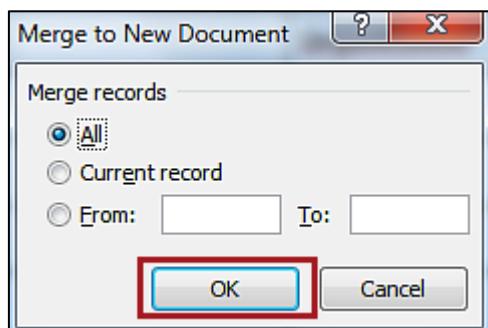
- Once the Excel spreadsheet is open minimise it to your task bar.
- Return to the Word register and go through the same process as documented from point 1 in the **Locating the data source topic on page 65: Mailings tab > Start Mail Merge group > Select Recipients > Use Existing List** > locate the Excel spreadsheet and open it.
- Instead of an error a **Select Table** dialogue box opens with the one spreadsheet selected. Click on **OK**.



8. Don't attempt to **Preview Results** as the register will not look how you anticipate it to. Instead within the **Mailings** tab, click on **Finish & Merge** and choose **Edit Individual Documents...**



9. The **Merge to New Document** dialogue box opens, leave the option of **All** selected and click on **OK**.

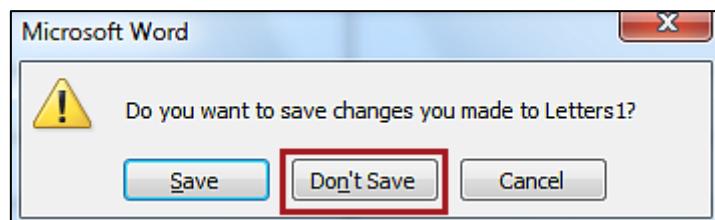


10. Your register will be produced with the correct course code, title, start date and time, along with the attendees, their job title and their organisation. In addition there is a column at the end for signatures.

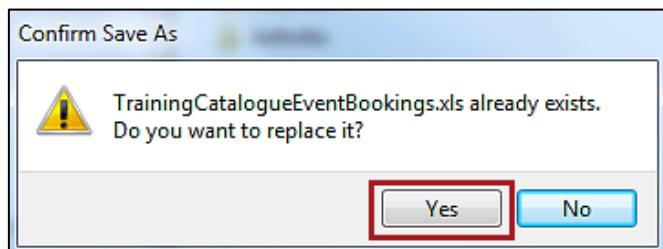
Attendance List – IT Services Training			
Course Code:	CCDADM		
Course Title:	Discoverer Admissions		
Start Date:	Monday, March 10, 2014		
Start Time:	1:00 PM		
<small>By attending this training session you are agreeing to comply with The University of Manchester's Data Protection Policy regarding the access and use of personal data.</small>			
Name	Job Title	Organisation	Signature
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]

29.5 Printing, saving and closing

1. You can now print this register off for use in your classroom.
2. The 'mail merge' register is merely a letter and will be called **Letters 1**, therefore you can close this register and not save it.



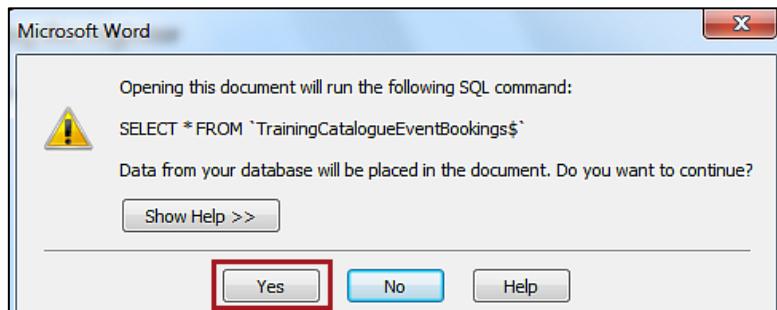
3. Saving the main Word register before closing it will automatically save the path to the data source; in this instance the data source was held in the P Drive and it is called **TrainingCatalogueEventBooking.xls**.
4. When you export future attendee information out of the Training Catalogue into an Excel spreadsheet, as long as you choose the same location, you will be prompted to replace the existing one. Simply continue to overwrite this Excel spreadsheet with new attendee information as and when you need to for producing new registers.



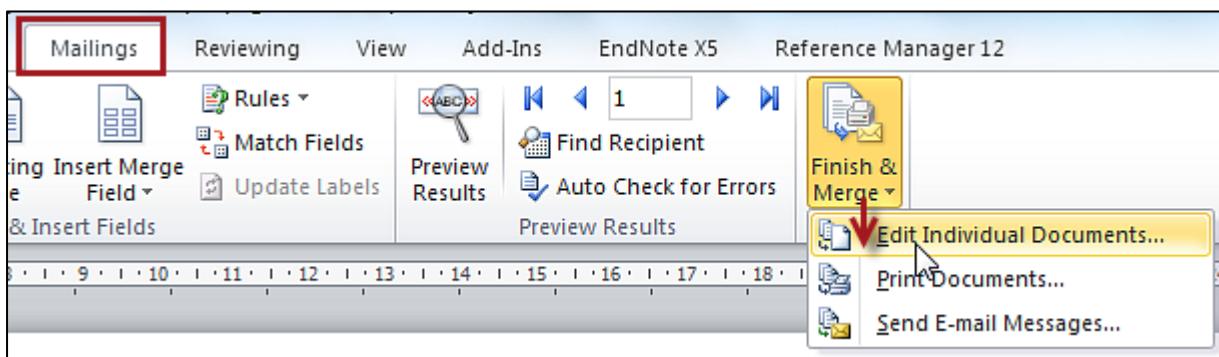
29.6 Re-opening the register

i Remember to open the exported Excel spreadsheet first because you need to accept that the file you are trying to open is in a different format to the file extension, then minimise it to your taskbar.

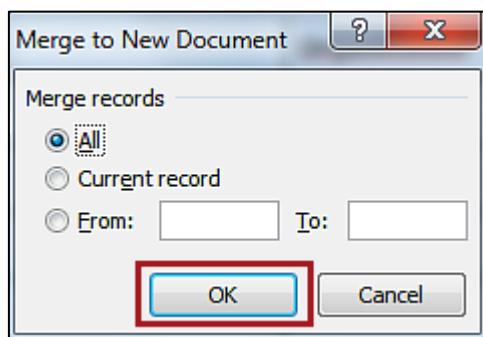
1. When you open the Word register next time (after having saved it and its path to the exported data source) you will be reminded that the document is going to run an SQL command and the data from a specific source is going to be placed in the document; do you want to continue?



2. Click on **Yes** and the register will open. You do not need to 'Select Recipients' again as you have already done this once, and now the register is already looking to that data source (the exported Excel spreadsheet).
3. Simply go to the **Mailings** tab, click on **Finish & Merge** and from the menu choose **Edit Individual Documents**.



4. From the **Merge to New Document** dialogue box click **OK** to see your newly populated register.



- i** If you wish the register to look to a different data source (maybe held in a different location) you will need to go through the process of **Select Recipients > Use Existing List** and locate the new data source.

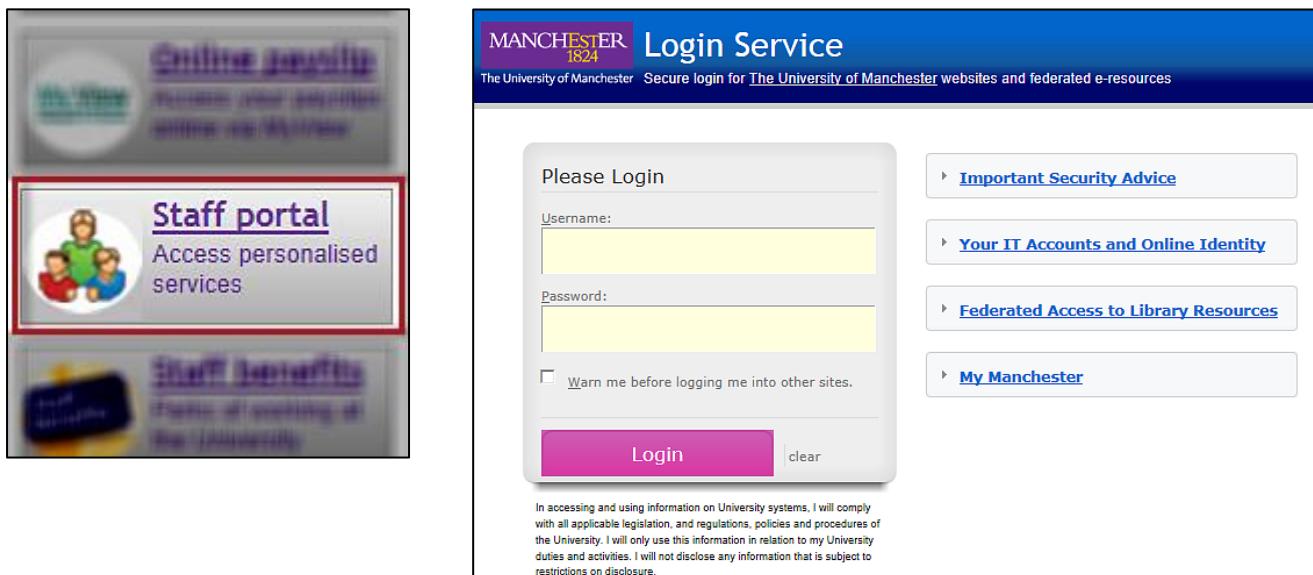
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Supplementary information

Locating the Training Catalogue for the first time from Staffnet if you do not have the direct link.

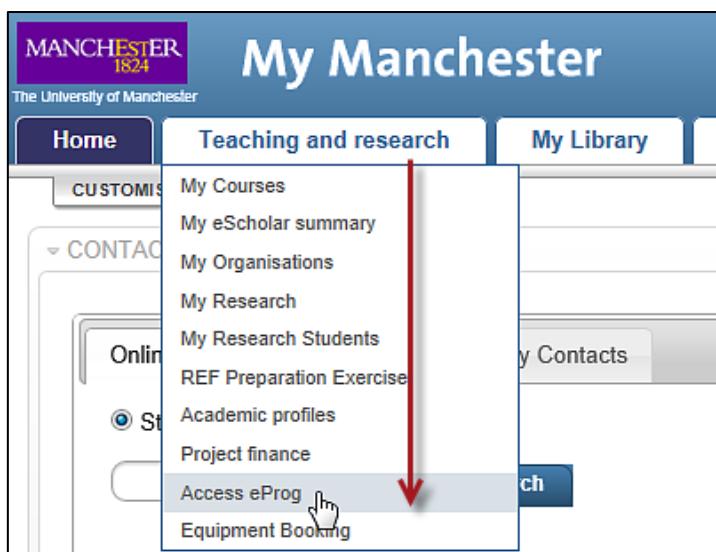
<http://www.staffnet.manchester.ac.uk/>

1. Scroll down the **Staff Net** page and from the left hand side locate the **Staff portal** link, click on it to log in, and log in with your standard university username and password.



The image contains two screenshots. The left screenshot shows the 'Staff Net' homepage with a red box around the 'Staff portal' link. The right screenshot shows the 'Login Service' page for The University of Manchester, which includes fields for 'Username' and 'Password', a checkbox for 'Warn me before logging me into other sites', and a 'Login' button.

2. Once you have logged into **My Manchester** you will be faced with a number of tabs – it's not immediately obvious where the Training Catalogue link is. Take your cursor over the **Teaching and research** tab to open a drop down menu. From the menu click on the **Access eProg** option near the bottom.

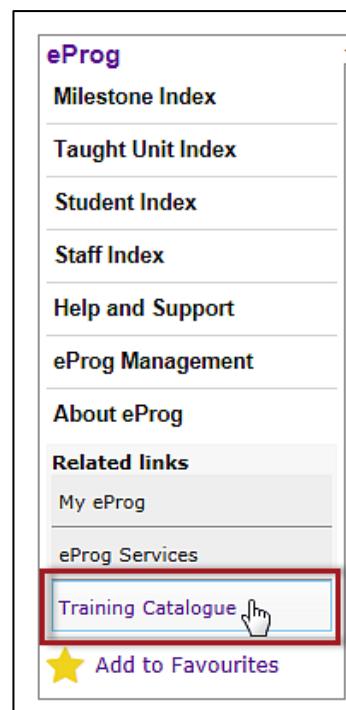


The image shows the 'My Manchester' dashboard. The 'Teaching and research' tab is active, displaying a dropdown menu with options: My Courses, My eScholar summary, My Organisations, My Research, My Research Students, REF Preparation Exercise, Academic profiles, Project finance, Access eProg (which is highlighted with a red arrow), and Equipment Booking.

3. Click on the **Access EProg** button.



4. A new window opens and you can now access the **Training Catalogue** via the link on the left of the eProg window.



5. When the Training Catalogue page opens in a new window you can then save this URL as a favourite using the star and **Add to favourites** menu – thus making it easier to access in future.

