MANCHESTER 1824
The University of Manchester

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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Table of Contents

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

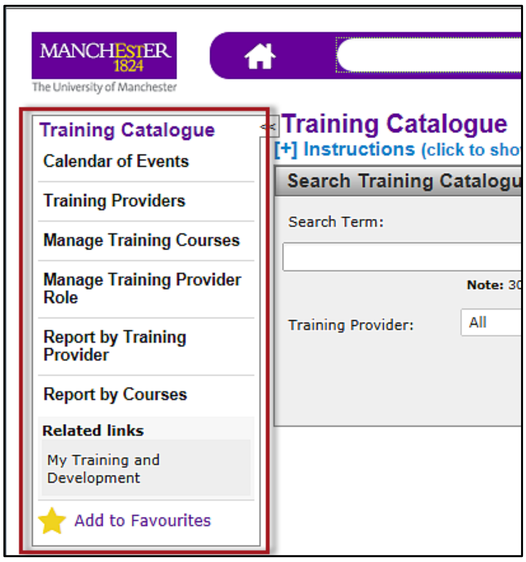
The Training Catalogue provides access to a catalogue of all skills training courses available to staff across the university. The catalogue is searchable by keyword or Faculty and all matching results are linked to the relevant skills training profile.

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.



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. **).**

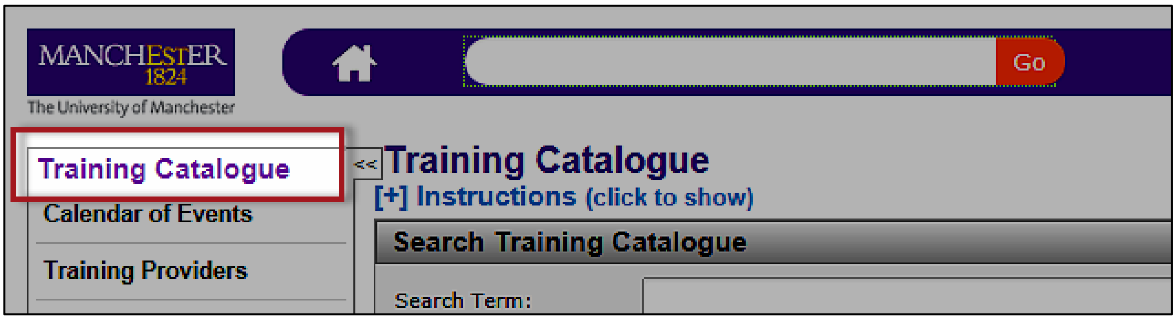
Note: Customers (participants) will only see the first three menu items:

- *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

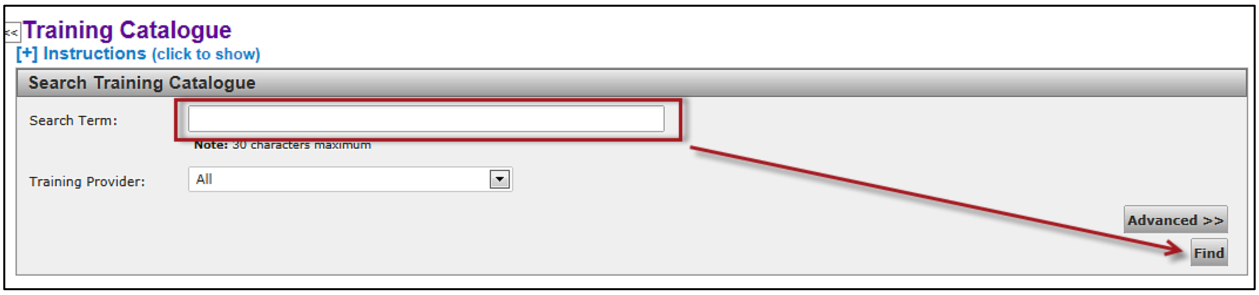
1. The Training Catalogue page is by default the first screen you see.



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.

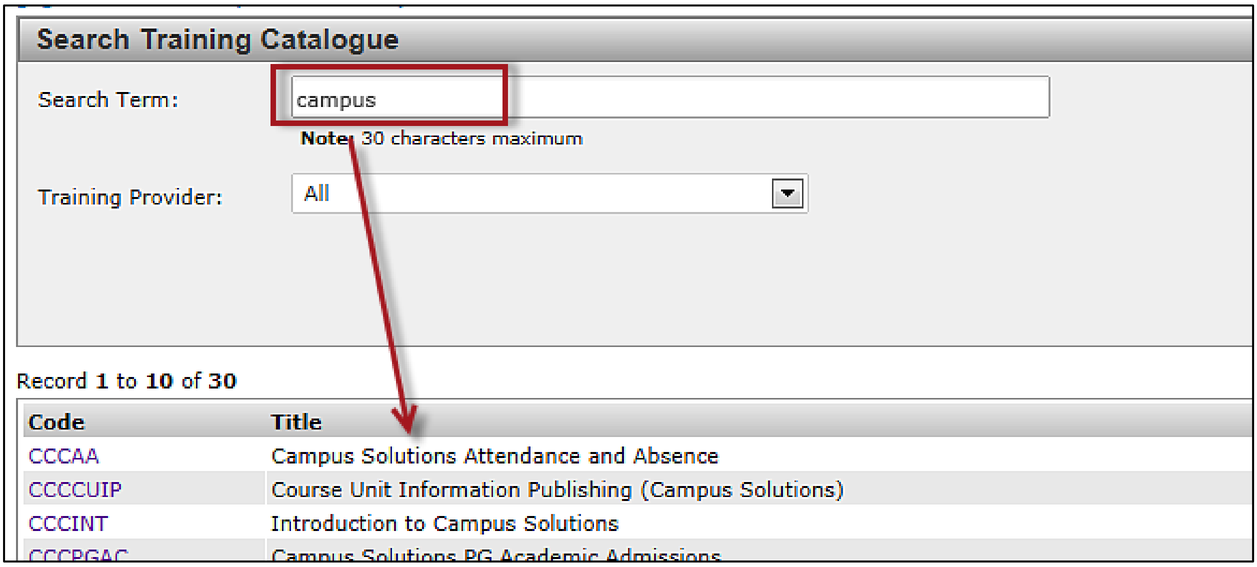
4.1 Searching for a course

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.



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.

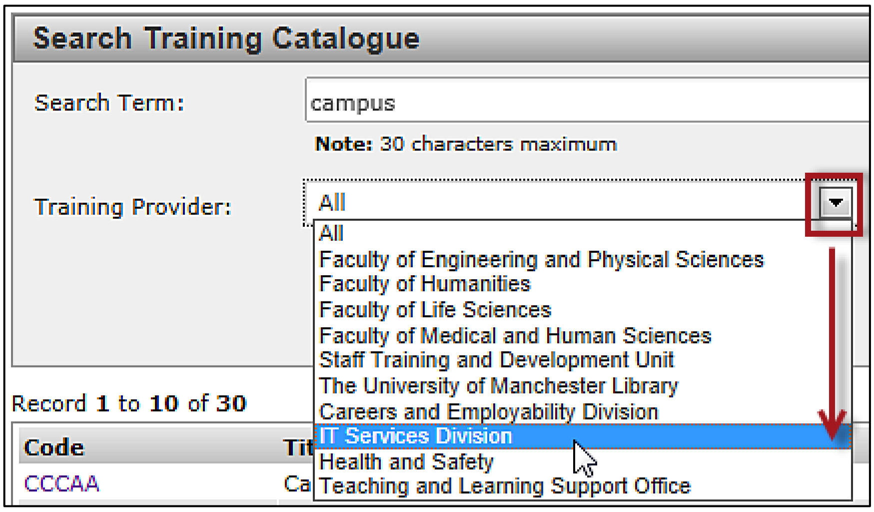
3. Results are ordered such that matches on course code are listed first, followed by matches on course title and then matches on course content description, so if the word 'campus' is in the title it will appear at the top of the list, followed by courses that have the word 'campus' in their descriptions/overviews.



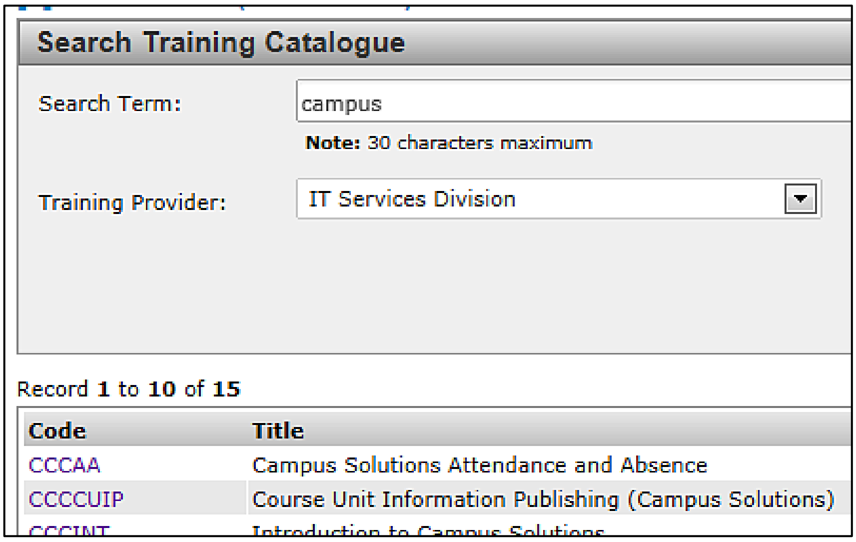
Please note if a course has been set up to be hidden from search results you may not return a result you were expecting. ***Hiding courses is covered in the section on creating courses from page 10.***

4. You can add further search criteria which will restrict the results you return.

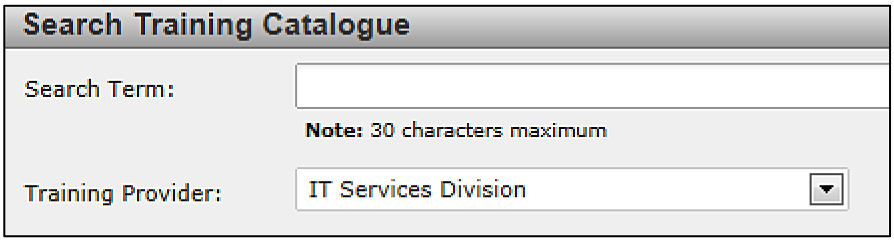
5. Retaining the word 'campus' in the screen shot, further additional criteria of Training Provider: **IT Services Division** has been selected.



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



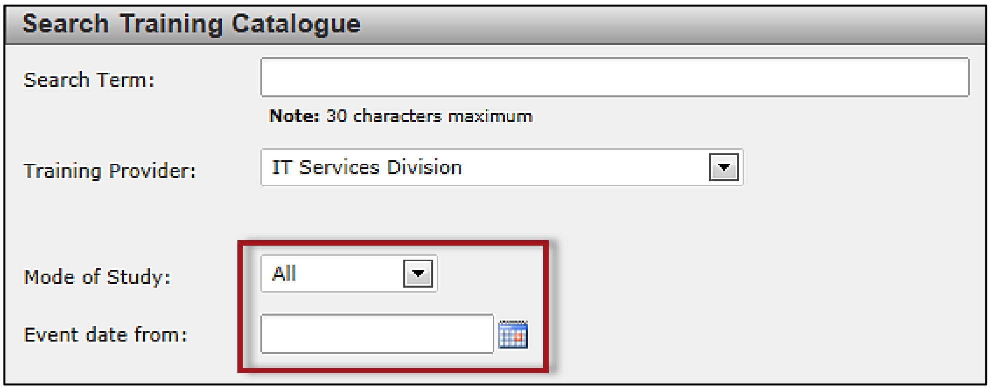
7. Alternatively you can remove the search term 'campus' and click on **Find** to return all courses offered by IT Services Division (or whichever Training Provider you choose to search by).



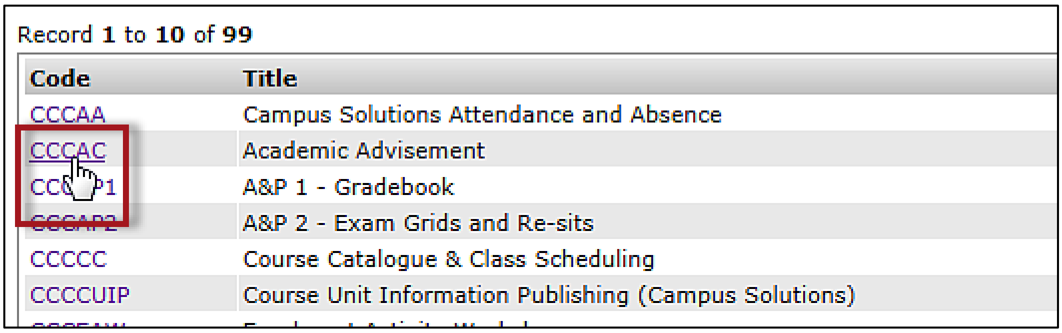
4.2 Advanced searches

1. You can utilise the **Advanced** button (right hand side) to see the additional search options;

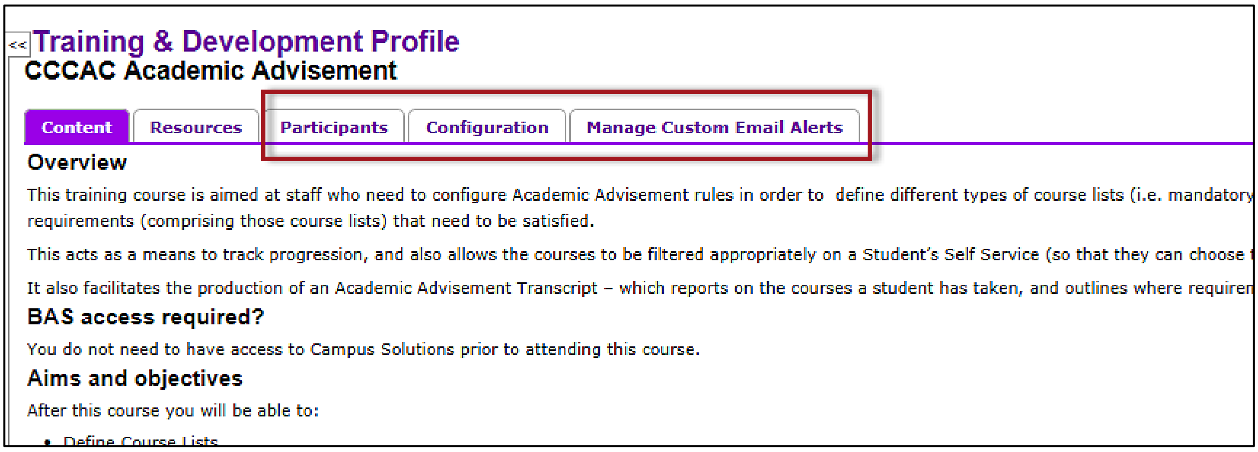
   - **Mode of Study:** online, Workshop, Face to Face etc.
   - **Event date from:** A calendar option that allows you to select a course start date to search from.



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



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.



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

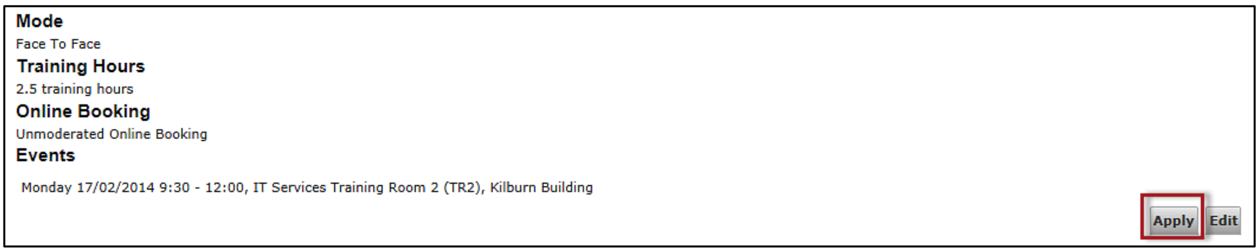
Administrators can determine whether a confirmation email is sent when an applicant books on a course, and then whether a reminder email is sent at a later stage and what the body of that email contains.

- 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.*



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

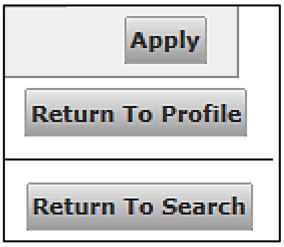
   a. Select a course date or add yourself to a waiting list – if there are no suitable dates.

   b. Add comments – information such as special requirements or working patterns etc.

   c. Apply.

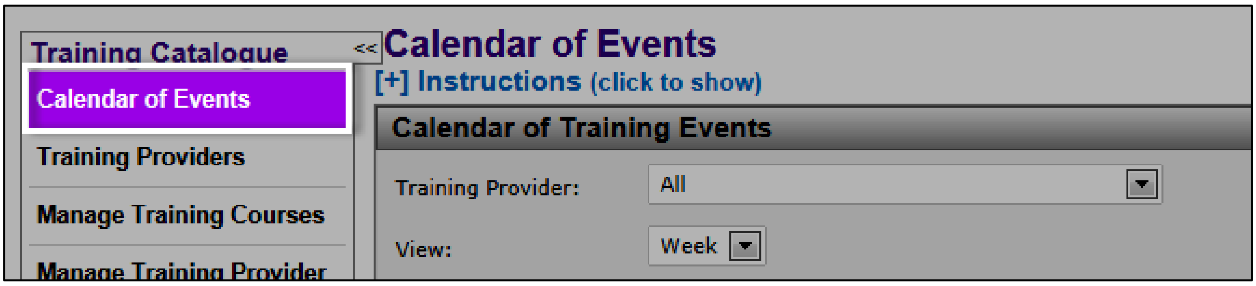
3. Beneath the **Apply** button there are two more options;

   - **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.

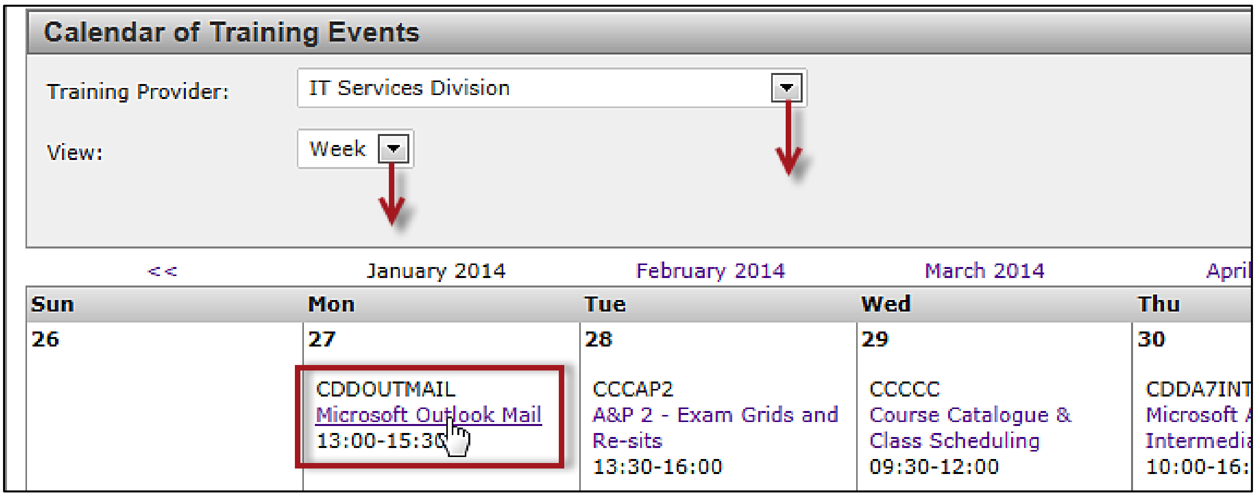


5 Calendar of Events

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

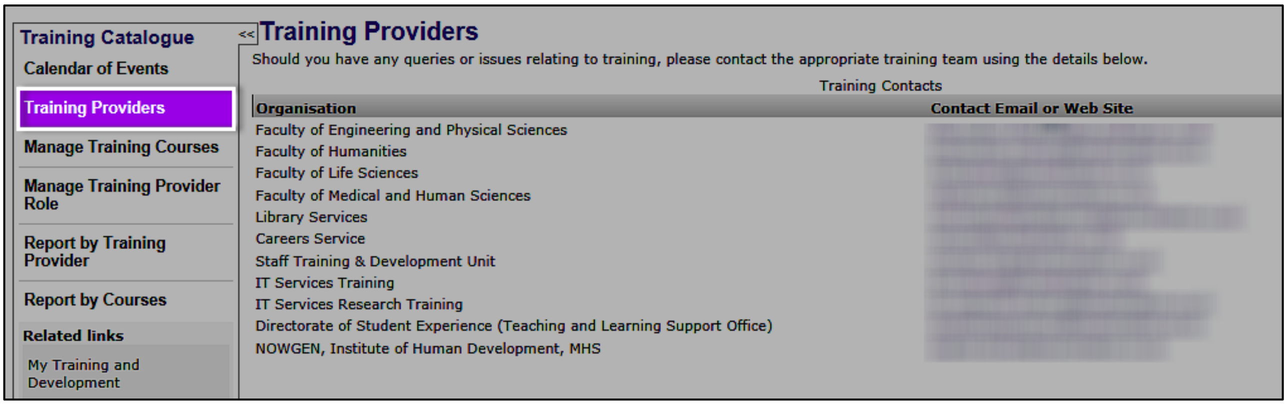


2. Clicking on an event displayed will take you through to the **Course Content** page where you can undertake all the actions previously described in the **Booking on a course** topic.



6 Training Providers

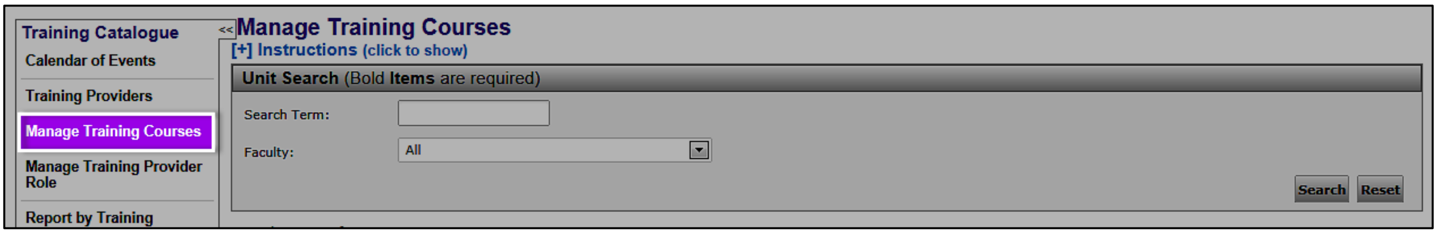
1. This page displays contact details for all training providers who deliver training across the university.



7 Course Administration – Administrator access

7.1 Manage Training Courses

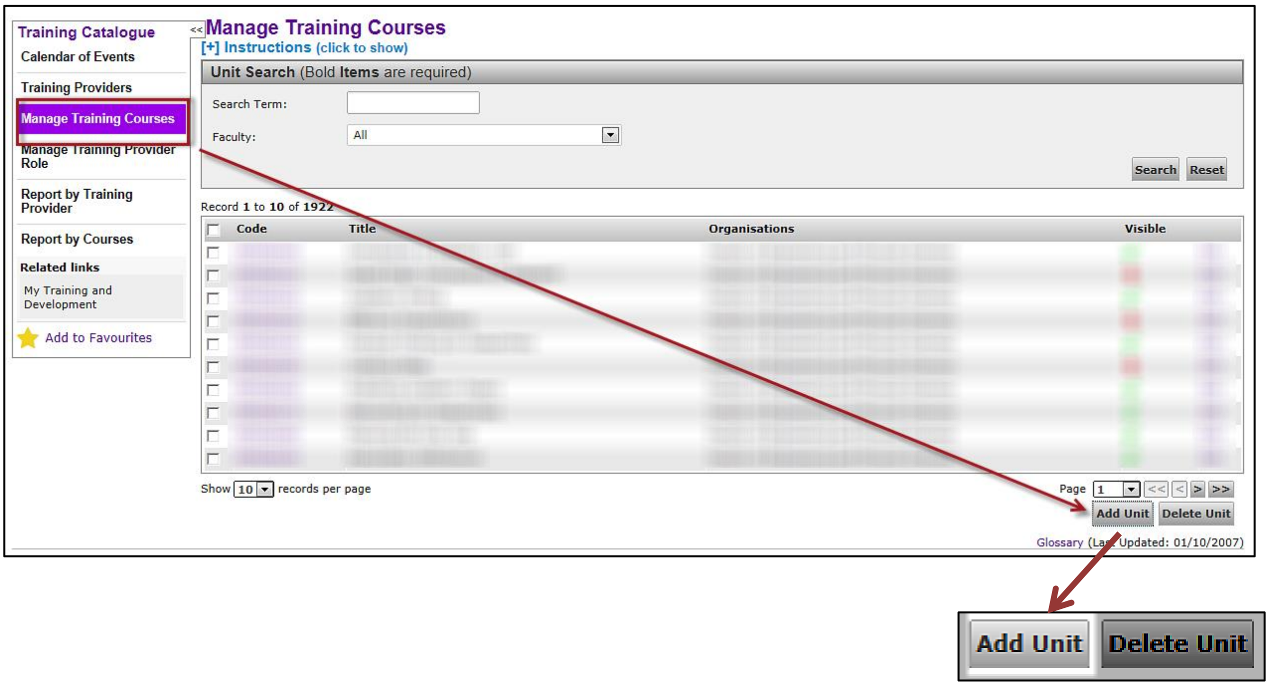
1. The **Manage Training Courses** page enables training providers to add and delete courses from the system and edit the core attributes such as Code, Title, Owning Organisations and catalogue visibility.



The 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.

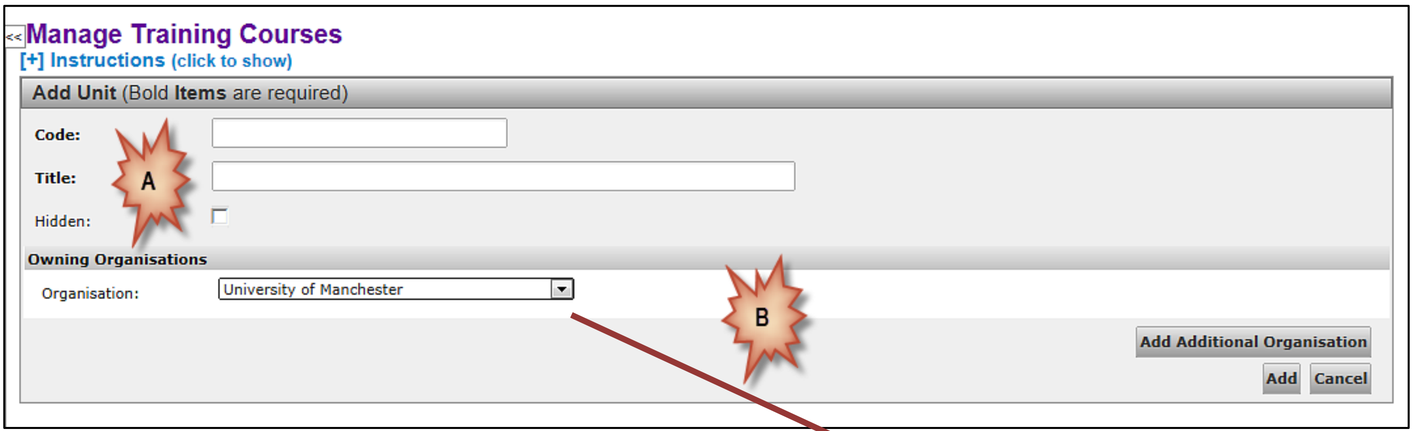


2. The **Add Unit** screen has two parts;

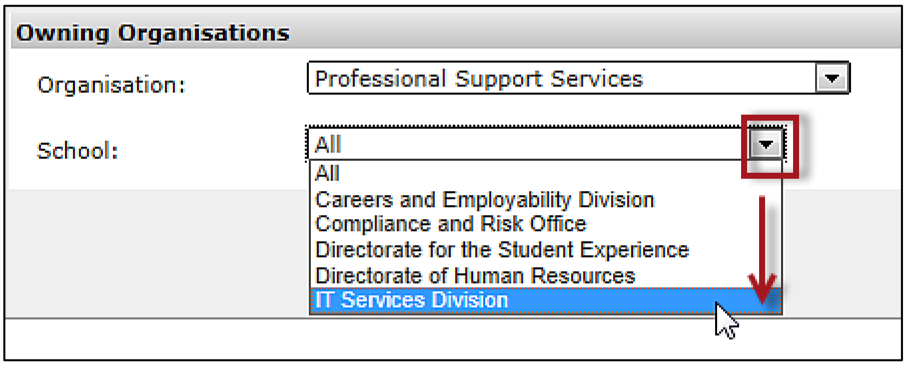
   A. This is where you enter your new **Course Code**, **Course Title** and decide if the course is **Hidden** from the search results.

ⓘ ***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.

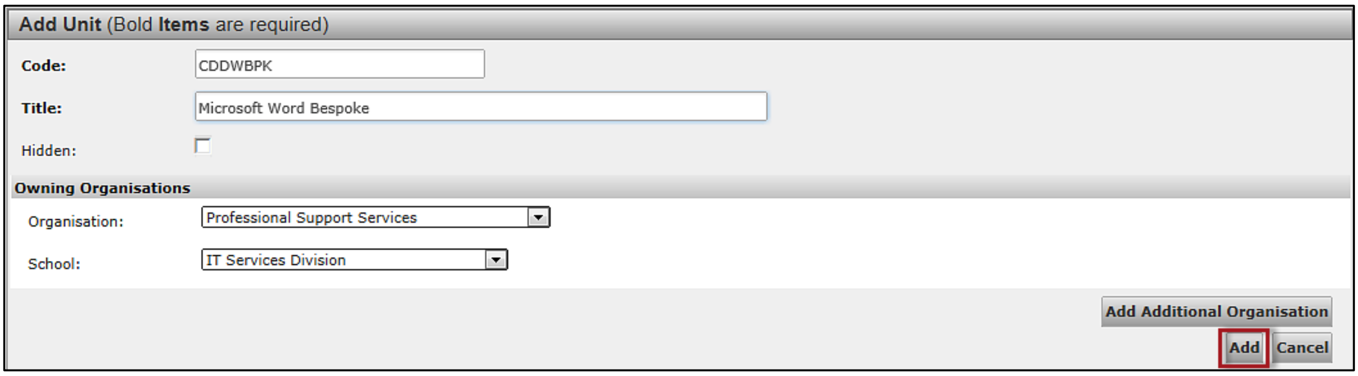


3. Once the organisation is selected a further **School** window opens and you can be specific about which school this course belongs to. (You can **Add Additional Organisation** if required).

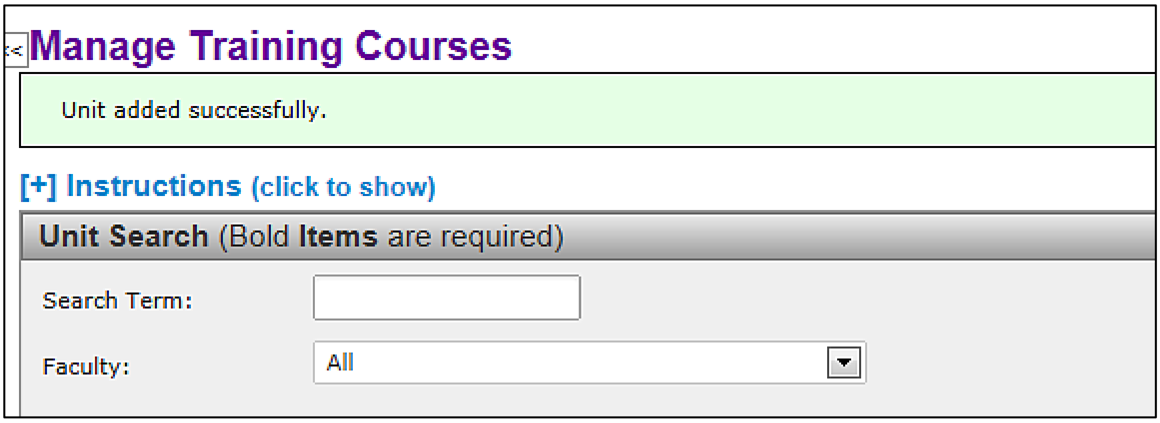


4. Once you have entered the required information, click on the **Add** button.

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



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

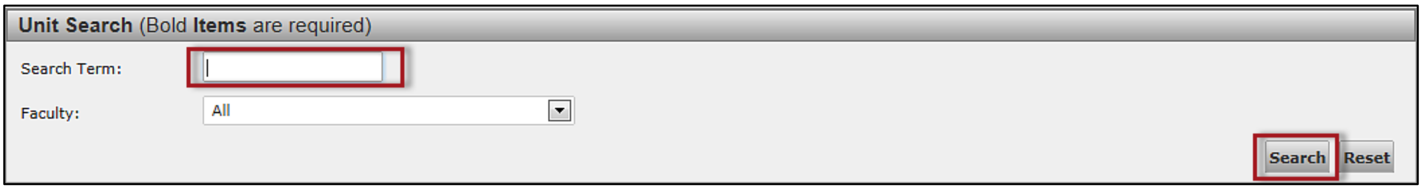


If you have failed to complete any of the elements of adding a new course the message will inform you that the unit was not successfully added, in this scenario you would need to go through the set up again and ensure everything was completed.

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.**

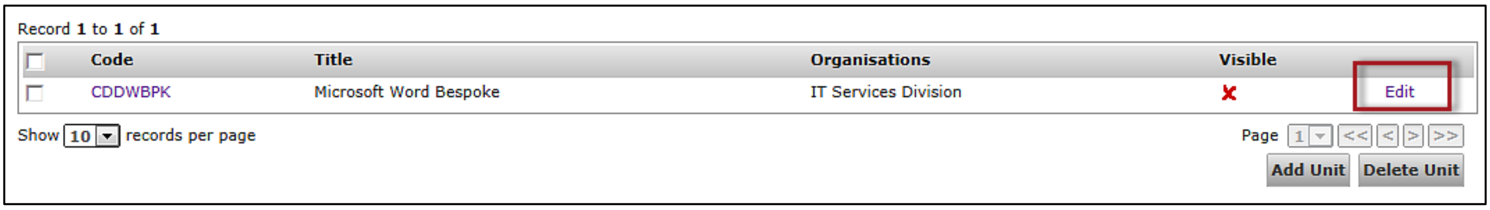
9 Editing an existing (or new) course

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.



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.

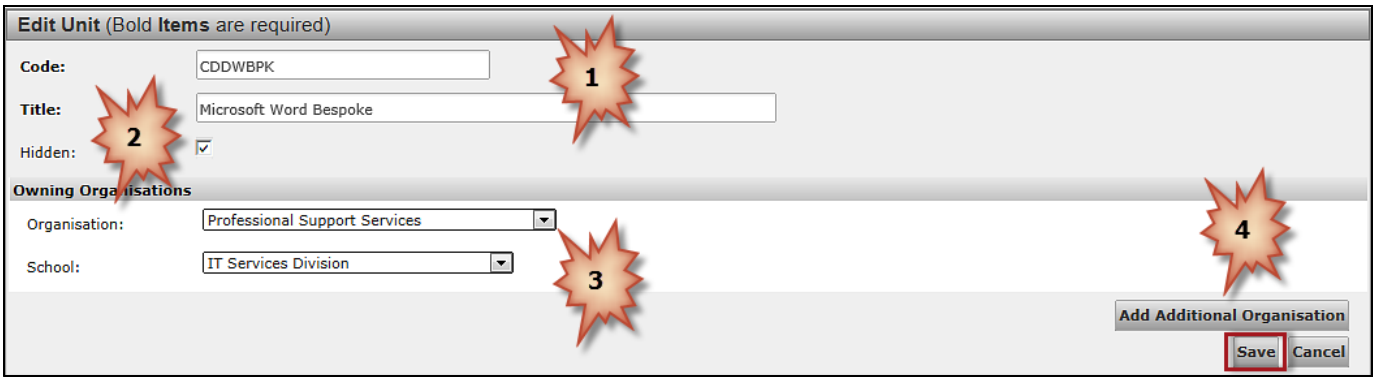


On this page you can edit the following;

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.

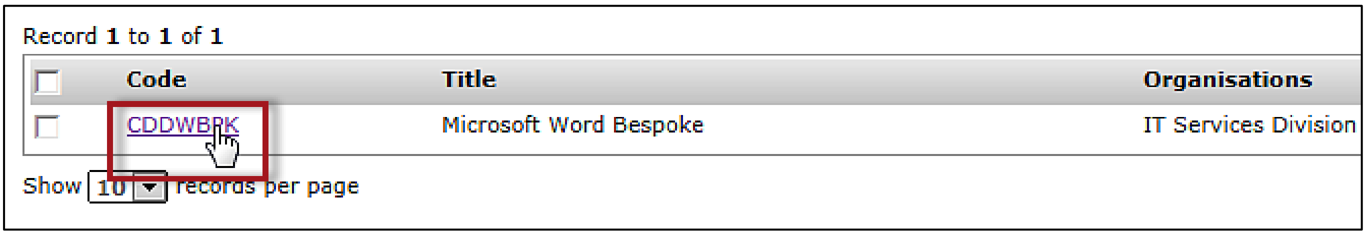
➢ Ensure you do add the School rather than leaving it at just the top level of Organisation as this then enables people from within your School that have administration access to the Training Catalogue system to access and edit this course if necessary.

4. You can also add **Additional Organisations** (if more than one provider shares the course administration).
5. Don't forget to **Save**.

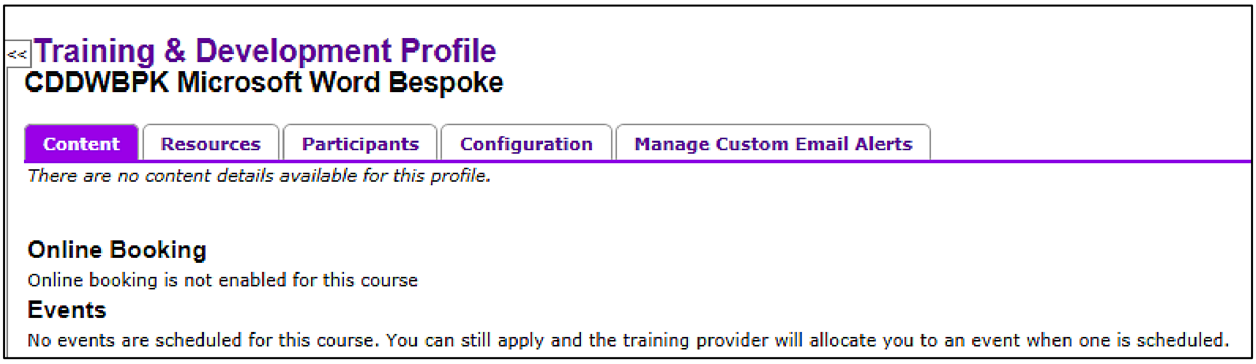


10 Editing the Course Content

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



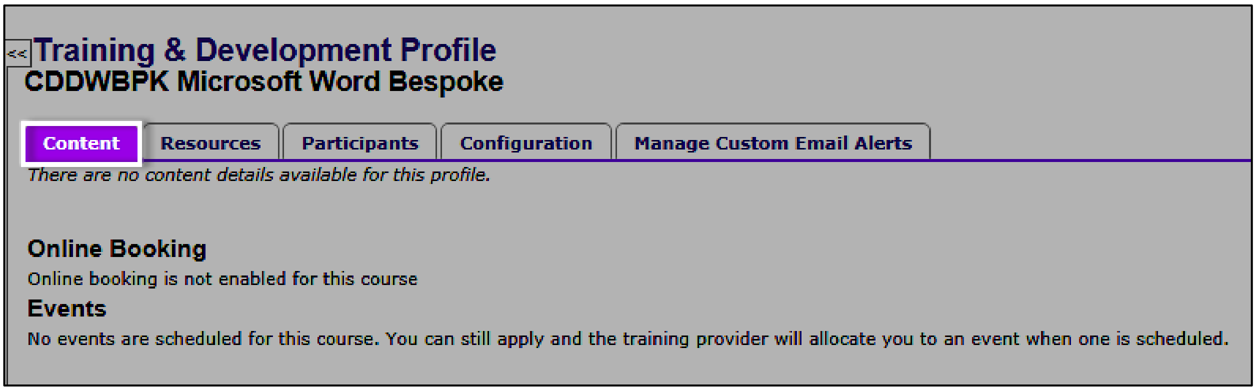
2. On this page you will see several tabs, each one giving access to edit the course **Content**, **Resources**, **Participants**, **Configuration** and **Manage Custom Email Alerts**.



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.

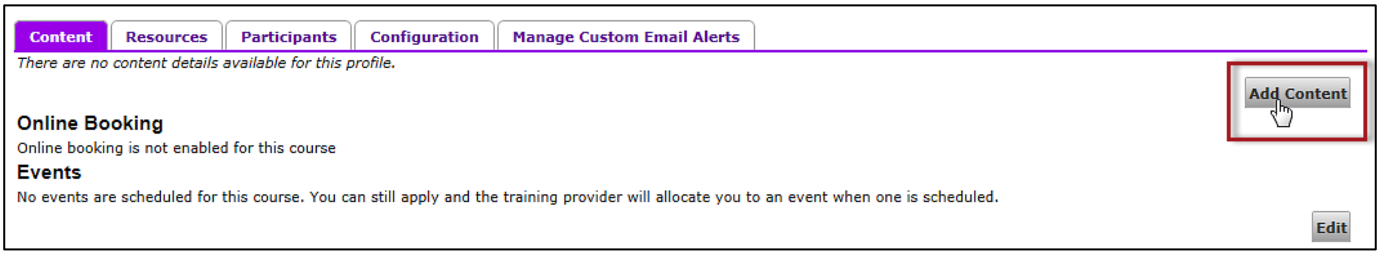
10.1 Adding/editing content

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.



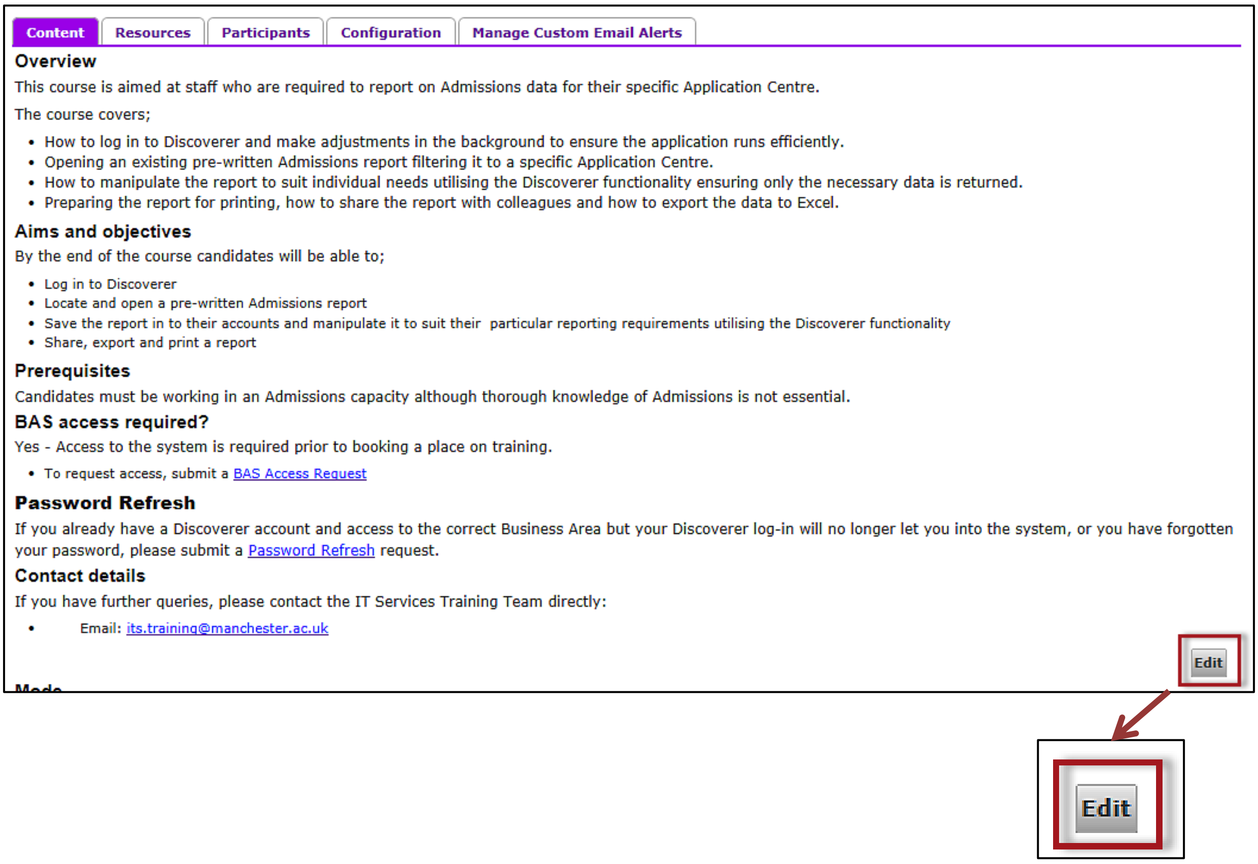
10.2 Adding content

➢ 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.



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.



ⓘ *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.*

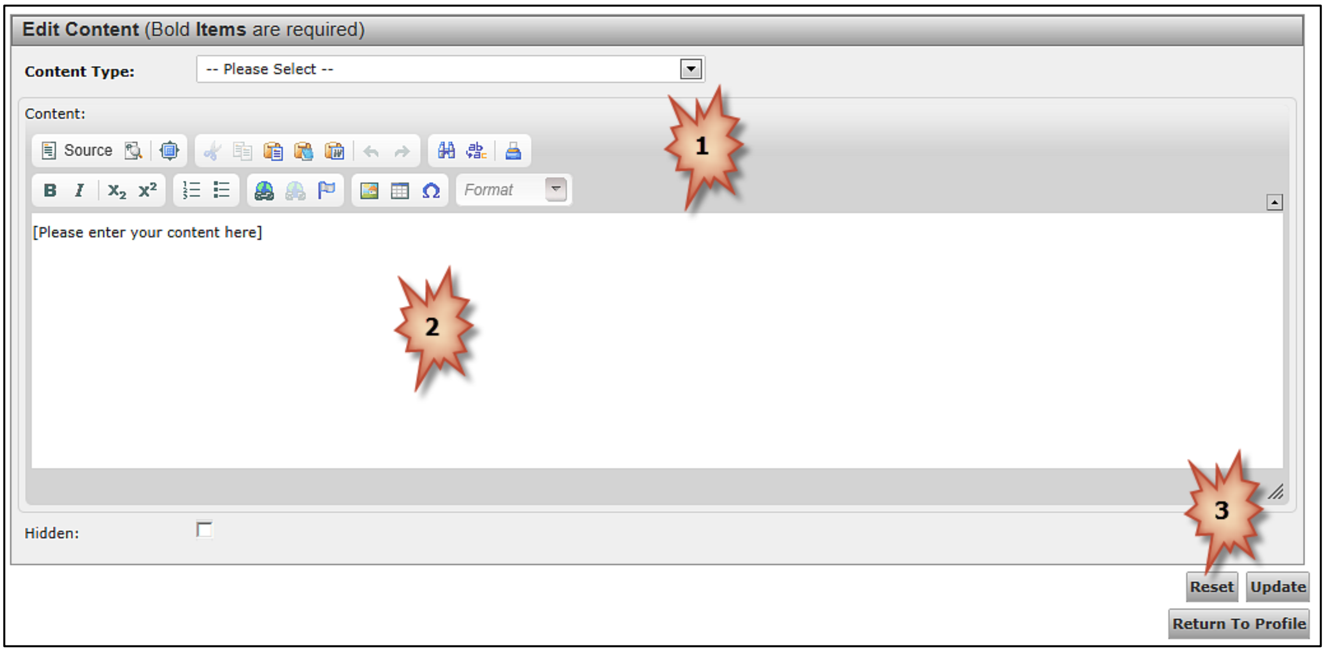
10.4 The Content Editor screen

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.

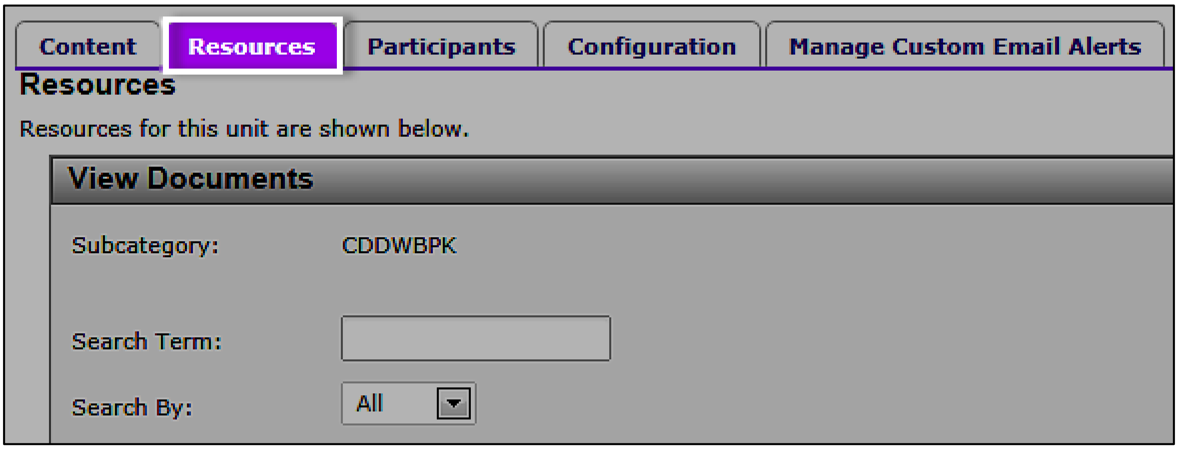
***Please note:** if you are adding content on a new course, the **Content Type** will not have been selected. Ensure you do this **<u>before</u>** you start to insert content as doing this after content insertion will result in the content being lost and you will have to re-input it!*



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.

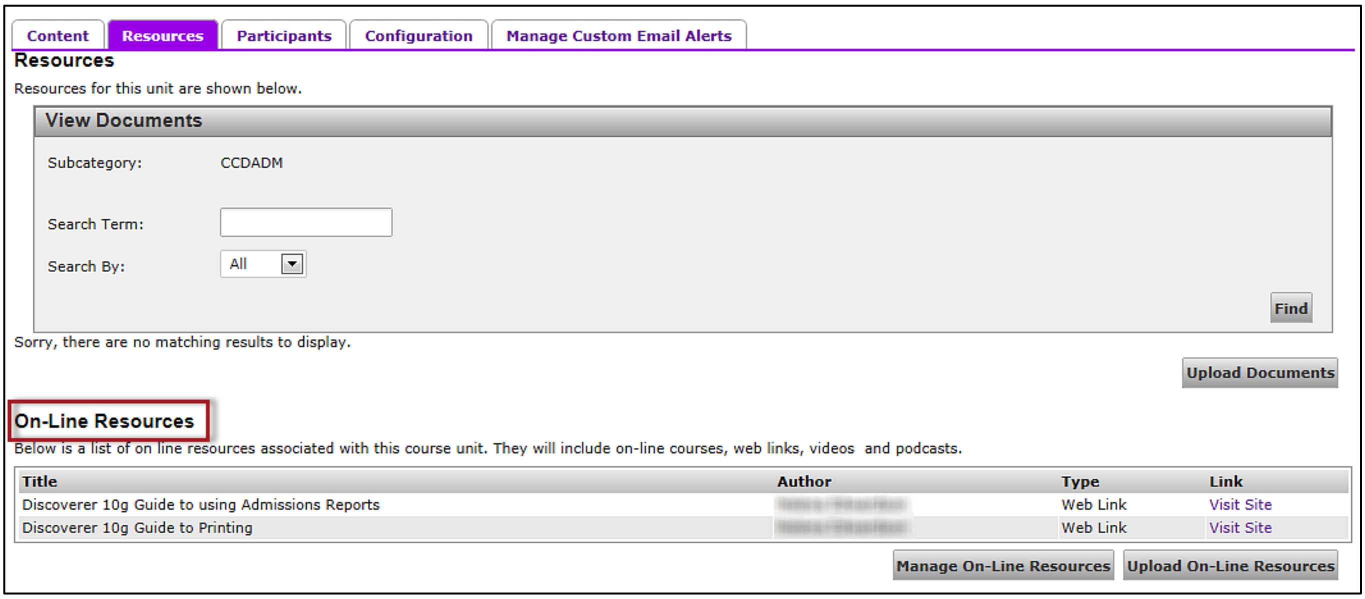


2. There are two sections to the **Resources** tab and everything that you set up here will be visible to the customer when they search for the course.

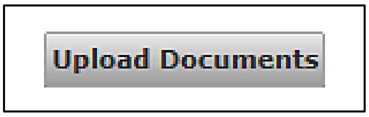
3. The top half of the screen displays any uploaded documents whilst the bottom half of the screen shows any online resources connected to the course.

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

ⓘ *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).*

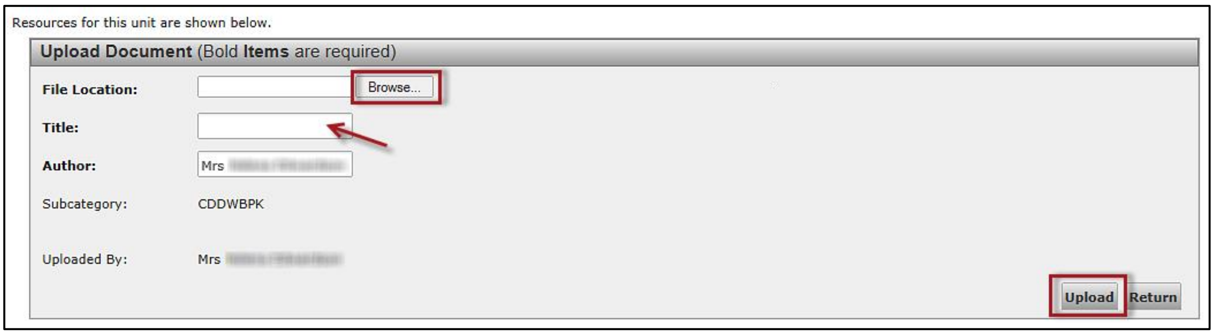


11.1 Uploading documents



1. If you click on the **Upload Documents** button the **Upload Documents** screen opens.

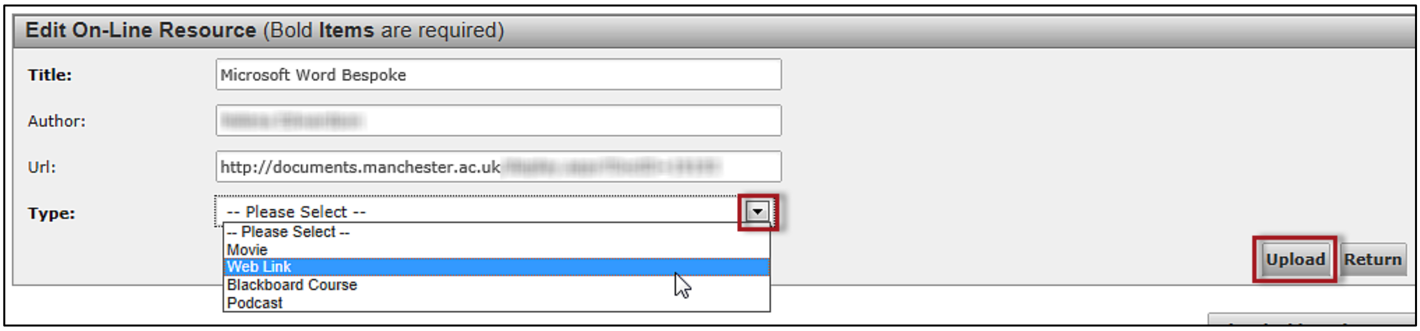
2. You can **Browse** to locate the document you wish to upload, insert an appropriate title, the **Author** window will be populated with your details by default, when you are ready click on **Upload**. Once documents are uploaded you can then utilise the **Manage Documents** button.



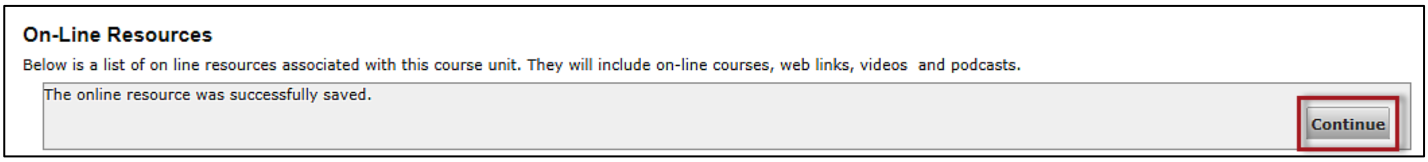
11.2 Uploading on-line resources

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

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**.

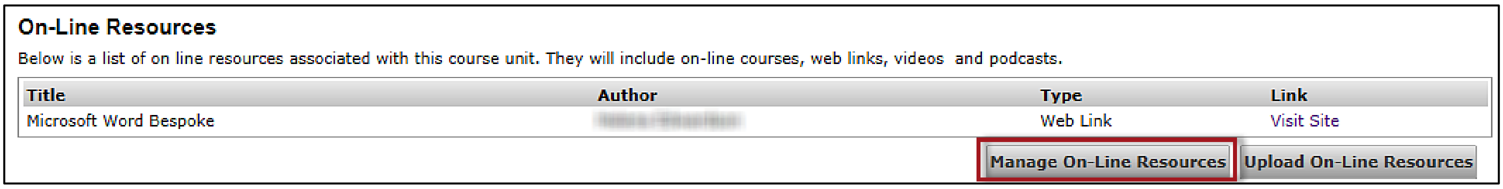


3. A confirmation message will appear, click on **Continue**.

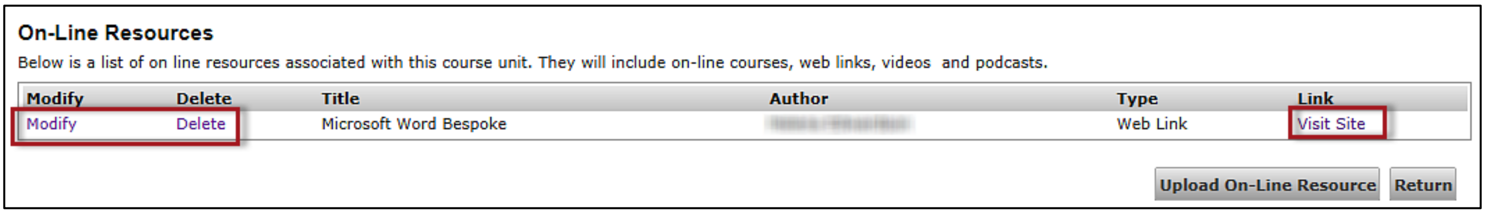


11.3 Managing on-line resources

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



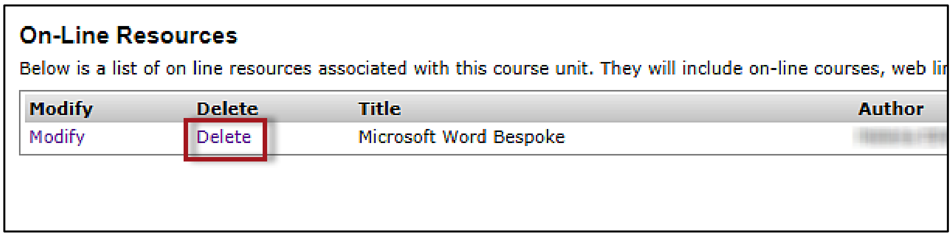
2. Each resource will have a **Modify** and **Delete** option and a **Visit Site** link to test the resource is working properly.



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.

11.4 Deleting an on-line resource

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



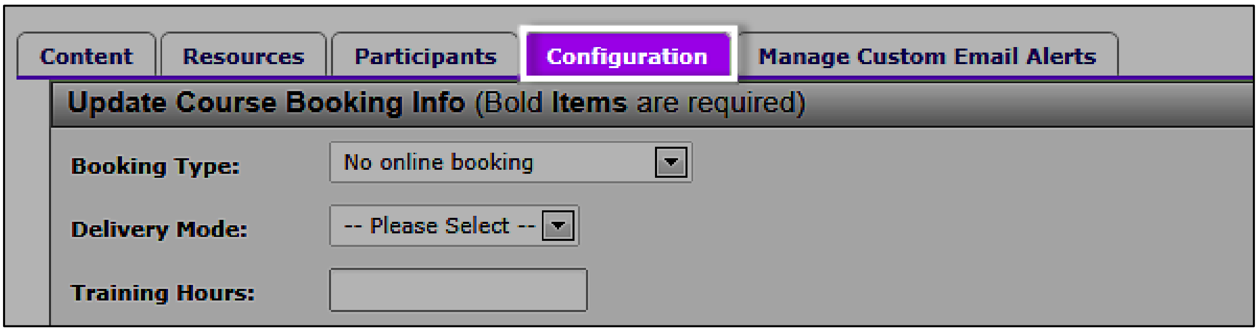
⚠ ***Please note:*** *If you click* ***Delete****, it <u>will do so instantly</u>. You will not be prompted again if you are sure you wish to do so and there is no undo function, so you will have to re-upload any documents deleted by accident.*

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

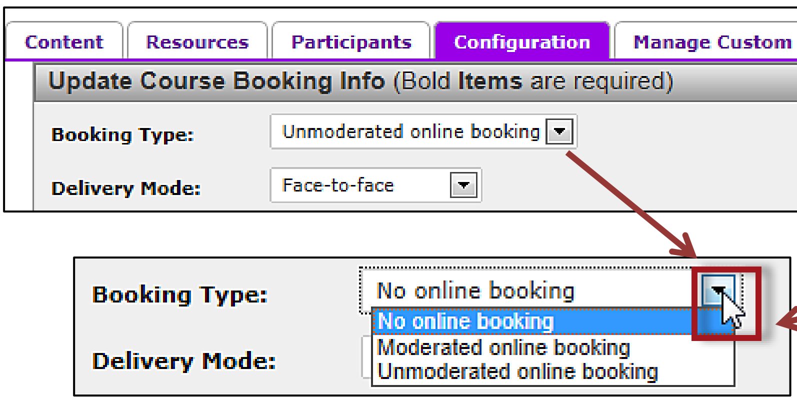
➢ **The Blackboard integration within Training Catalogue is covered from page 22.**

12 Configuration

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



Booking Type:



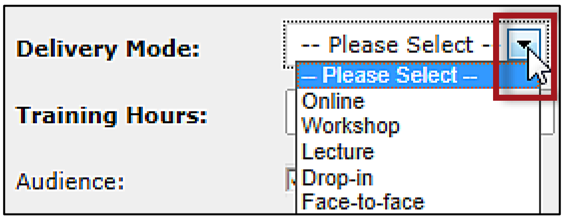
Please note: the **Booking Type** of online is making reference to the ability of participants to book the course via the web and not the nature of the training course.

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.



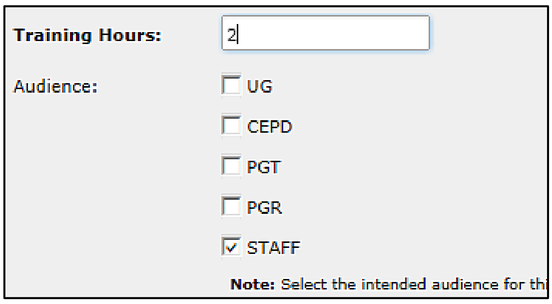
Please note – depending on which organisation you belong to your delivery mode may differ. <u>It is worth consulting with a member of your team before choosing your delivery mode</u>, for example your taught classroom based courses may actually be listed as 'Workshops' rather than 'face-to-face'. ***Please 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 **<u>are not</u>** 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!

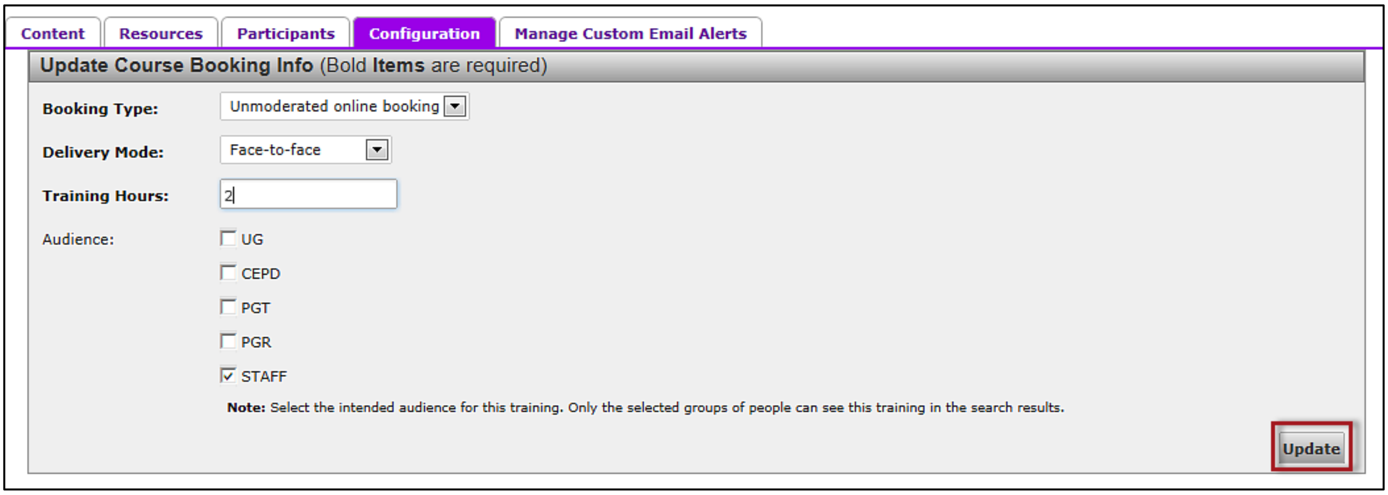


Please note that although the selecting of the audience will stop people from outside that audience base being able to see this course when doing a simple search in the Training Catalogue, if the course link is hosted on a Training Provider website and they navigate to it, they will be able to follow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

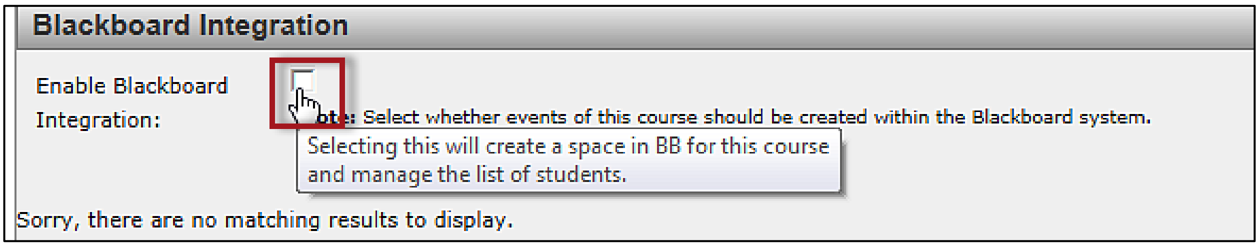
2. Once this information is in place click **Update**.



13 Blackboard integration

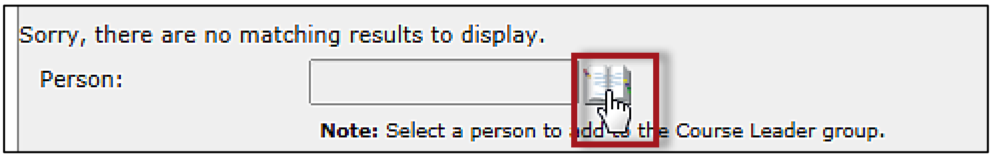
1. The bottom half of the screen allows you to enable **Blackboard Integration**.

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.

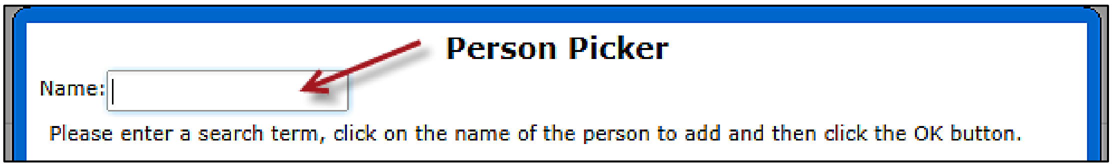


2. You can also add the **Blackboard Course Leader** this will be a tutor or tutors who can build the template course and deliver training for training events.

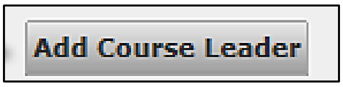
3. Click on the book icon to open the **Person Picker** box.



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

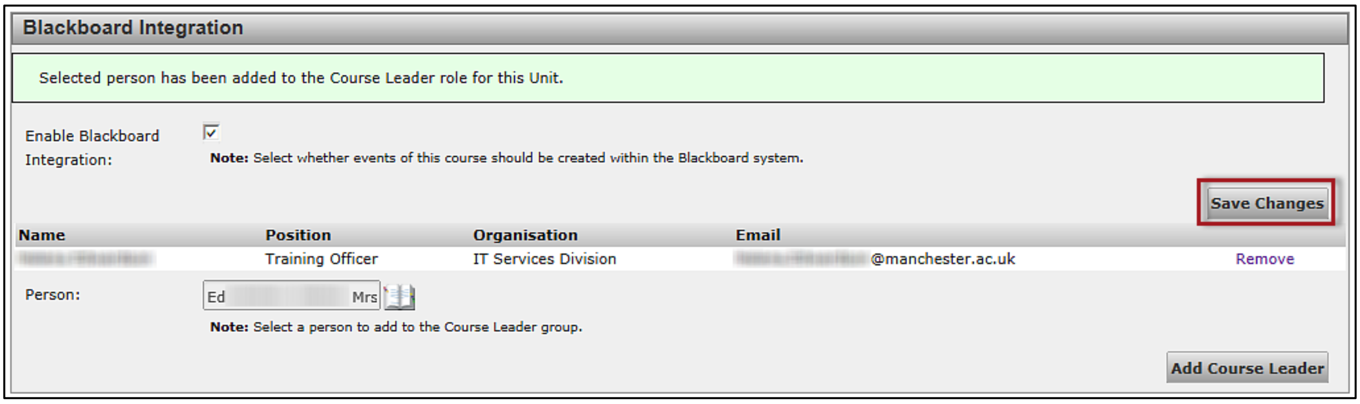


4. Choose the appropriate person in the list and they will highlight in blue, and then click on **OK** at the bottom of the window and click on **Add Course Leader**.

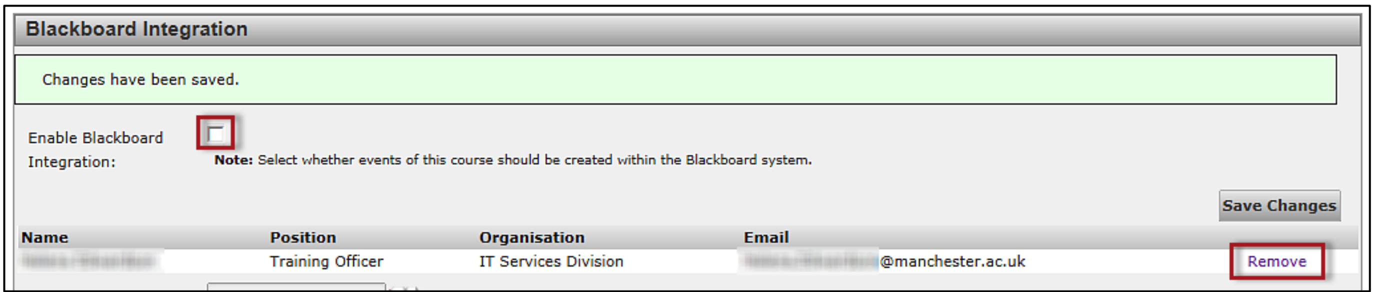


4. You will be informed that the person has been added to the course leader role and you will see who they are, their position and email details.

5. 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**.



6. 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.



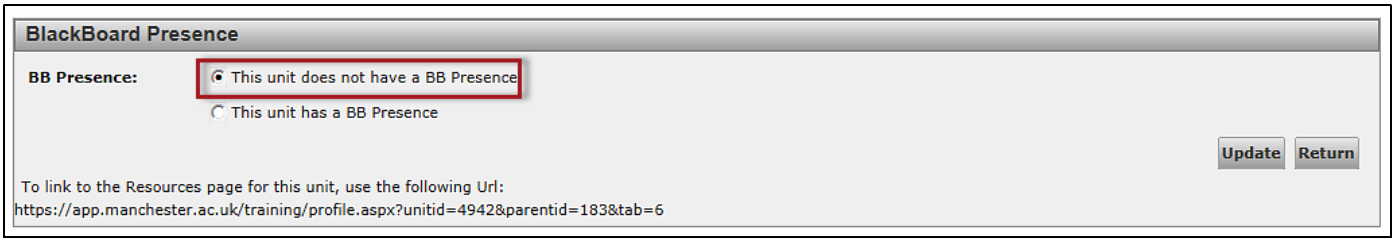
Tutors for the course and the Blackboard space have to be entered in the Course Details. Any/all possible tutors for the course must be added here.

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.

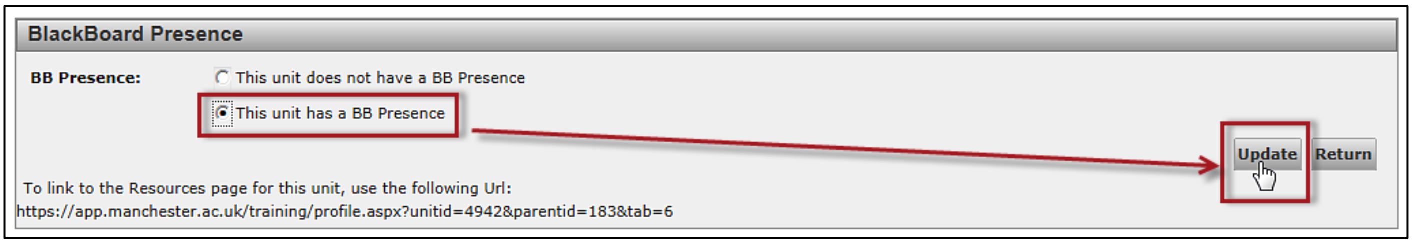
13.1 Returning to the Resources tab (Blackboard)

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

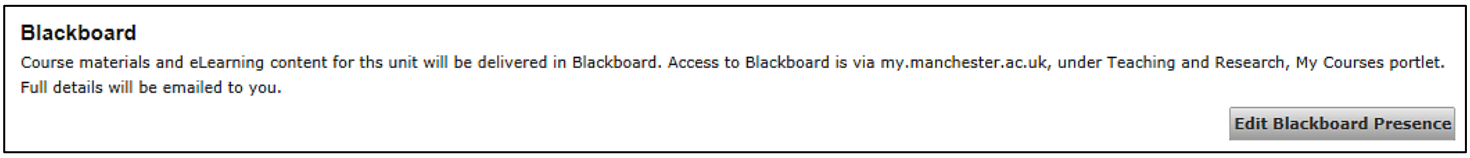
2. If there is no Blackboard presence **This unit does not have a BB Presence** box will be selected.



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



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



14 Additional instructions for Training Providers/Tutors using Blackboard

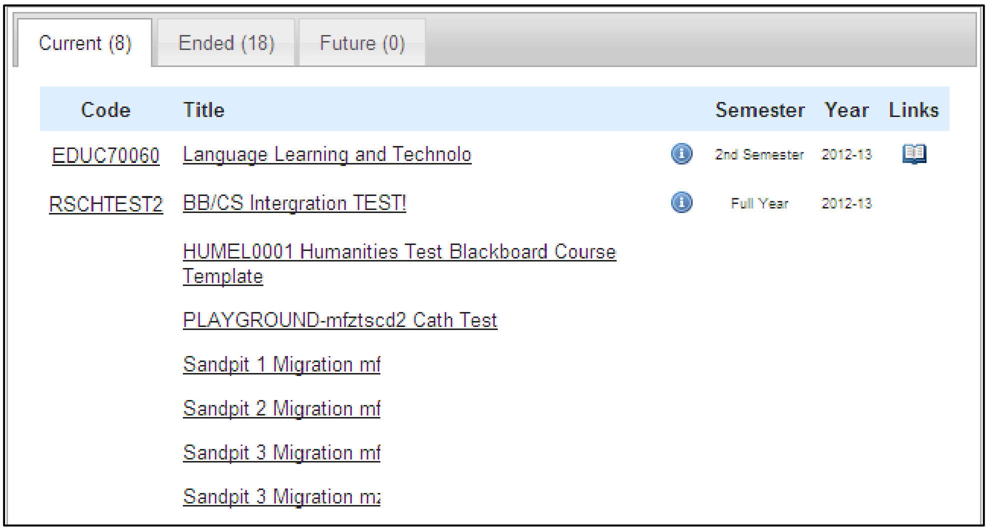
1. As a Tutor on a course you will have the Course Leader role in Blackboard.

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

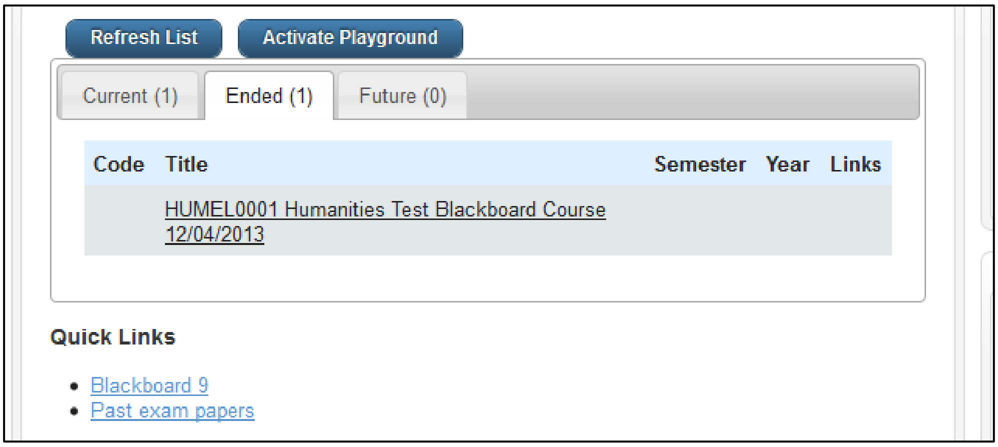


5. Click on this link to enter the course and build your template Blackboard course as normal. Visit the Knowledge Base for details on how to build a Blackboard course.

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.



14.1 Additional Blackboard information

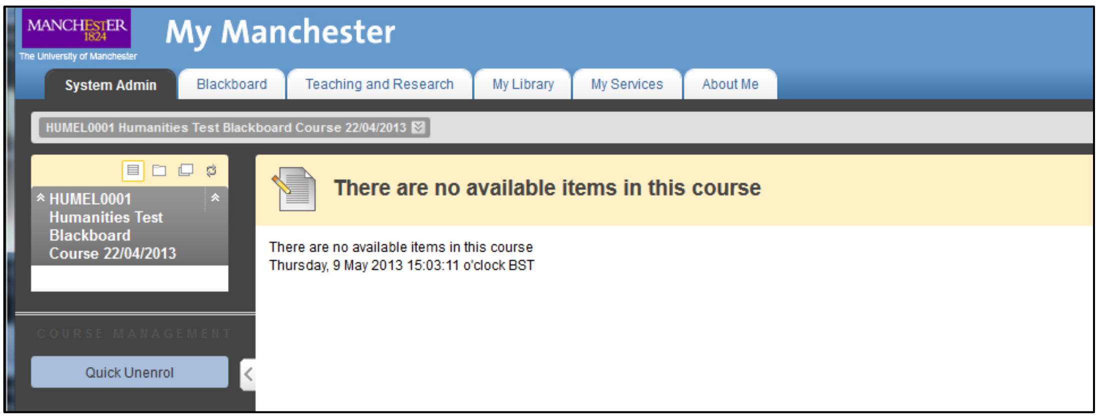
14.2 Access by your participants

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.

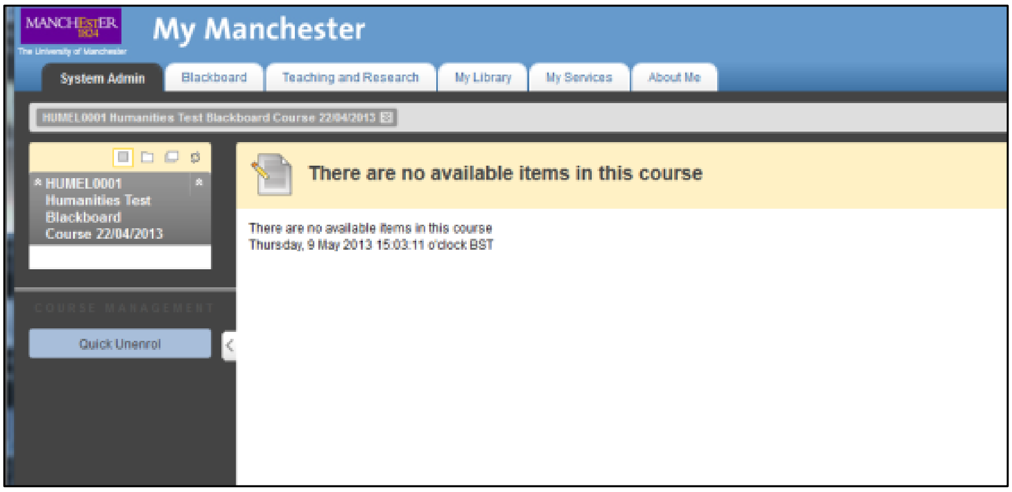
Participants will still be able to view the link; when clicked they will be able to access Blackboard but not view content from the course. See screen shot on the next page.



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

14.3 Additional instructions for Participants where courses are using Blackboard

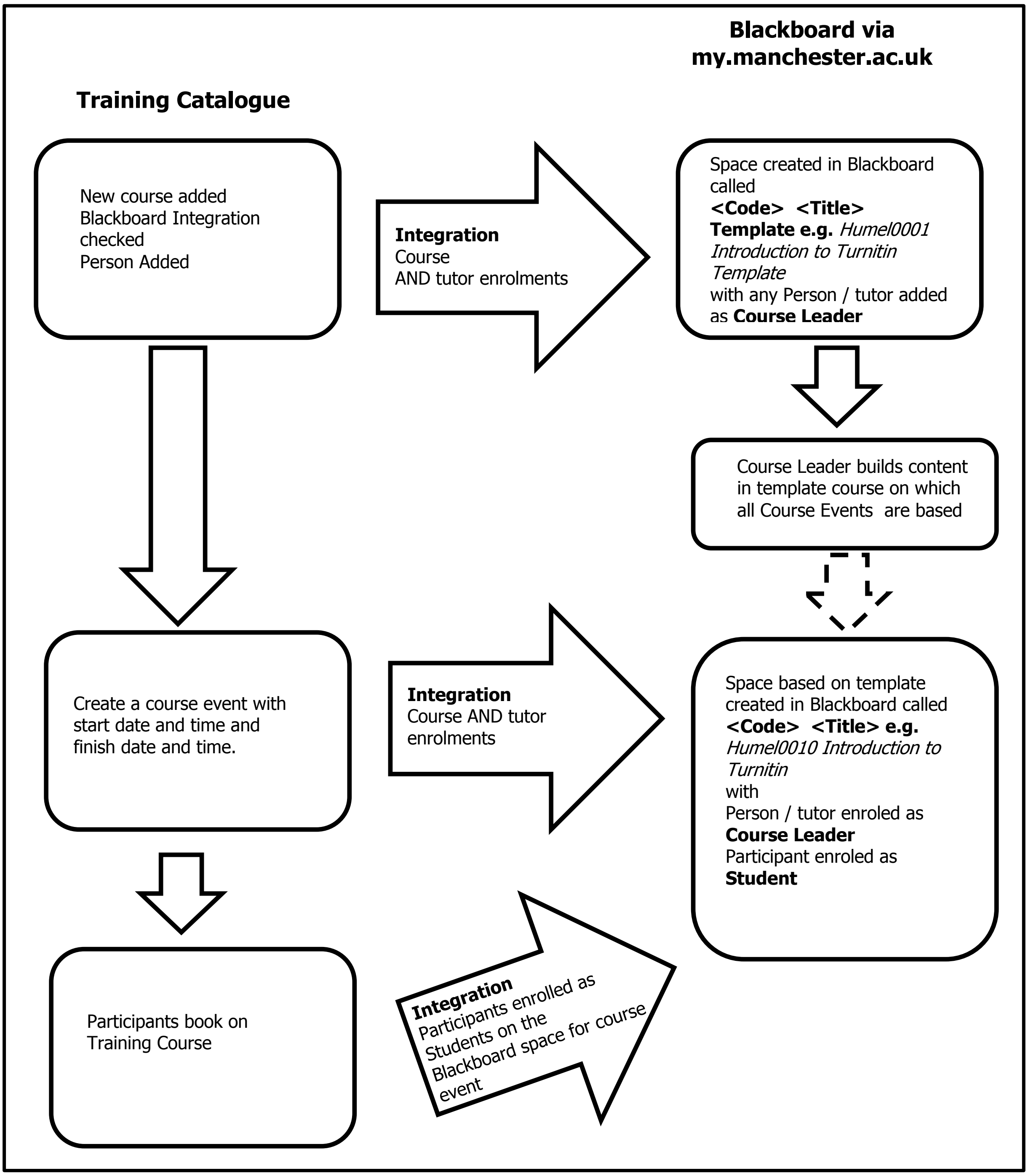
1. Apply for your Training Course
2. If your course uses Blackboard wait 1 hour (Training course creation under normal service take 1 hour.
3. Go to **My Manchester**, my.manchester.ac.uk, click on **Teaching and Research**
4. In the **My Courses** portlet, click the **Future** tab, you will see a link 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

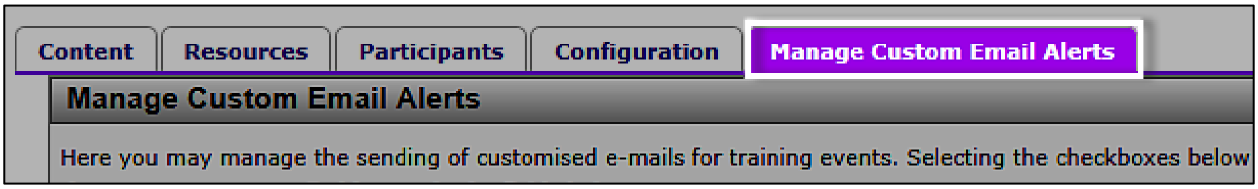


In Blackboard a Course Leader can;

- 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

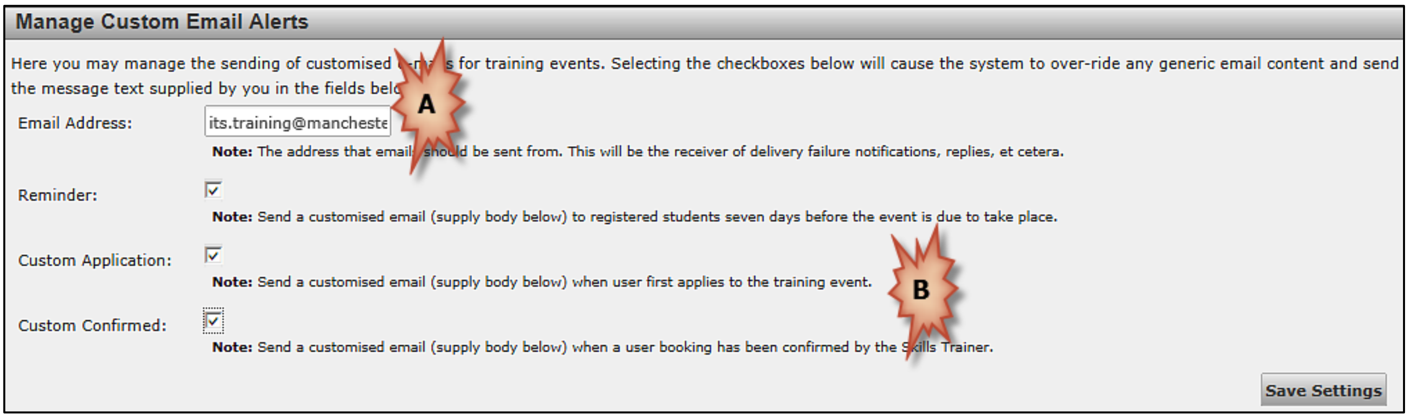
15 Manage Custom Email Alerts

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



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**.



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.**

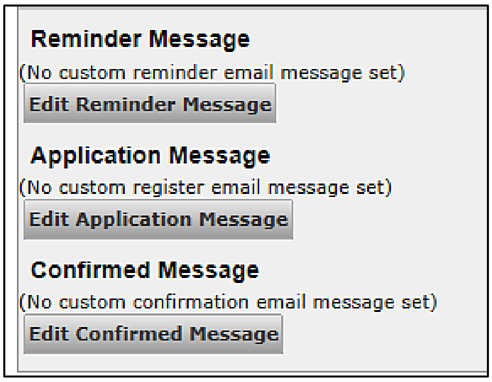
15.2 Email message alerts

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 - *the custom application email is used for moderated courses so that the applicant knows their application has been acknowledged and is being dealt with.*
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**

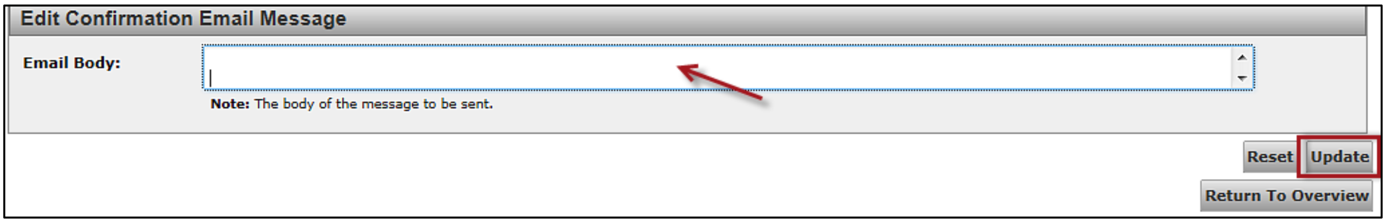
15.3 Editing Email Alerts

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).

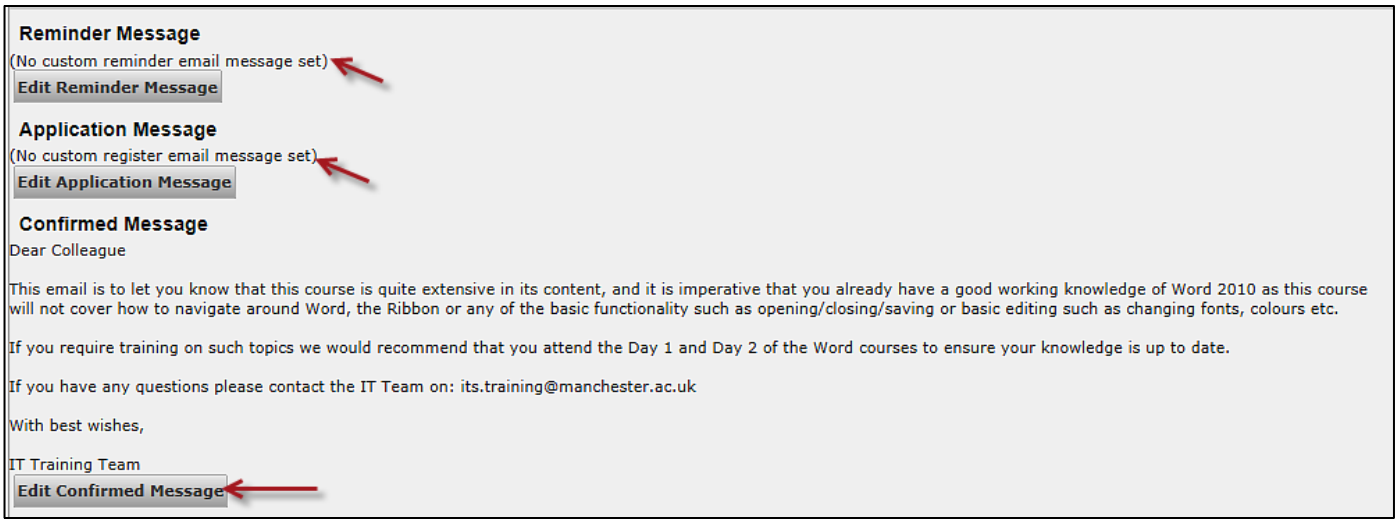
2. Click on the corresponding button to edit the email message.



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



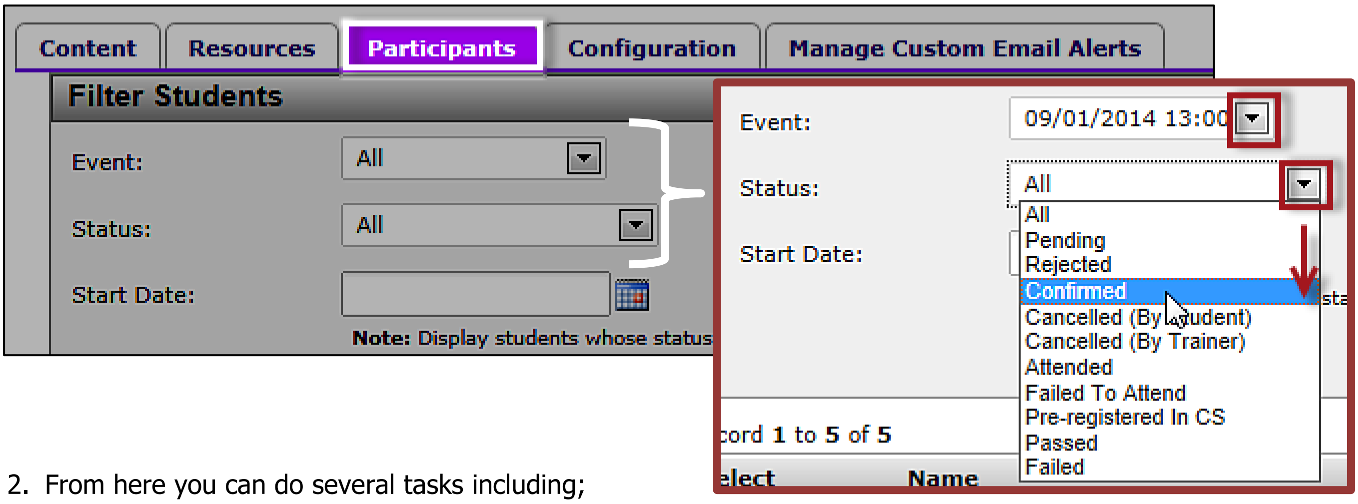
4. Once you update this custom email you will see the body of the email in the **Manage Custom Email Alerts** window. Any alert that has not had an email set will inform you. The custom email you have inserted can be edited using the **Edit Confirmed Message** button.



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

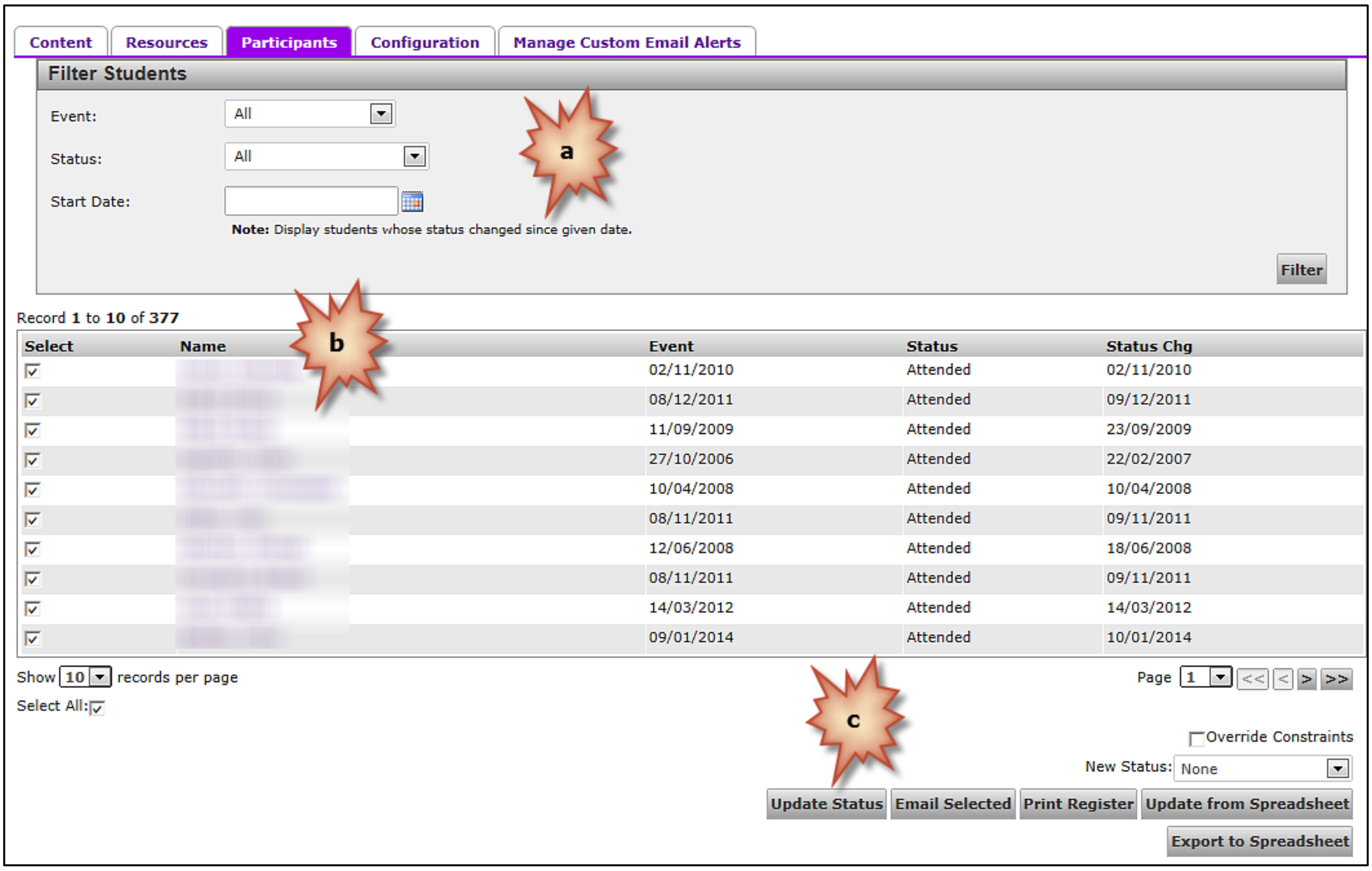
16 Participants

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



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.



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 - <u>Please be mindful of data security rules if exporting any information from the Training Catalogue particularly as this data contains SPOT numbers.</u>

- **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;

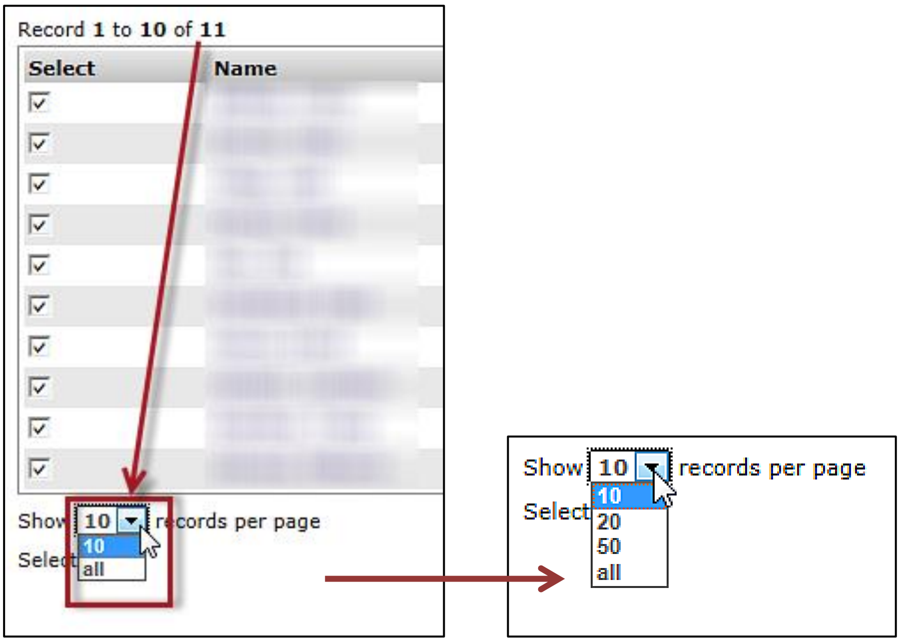
- **Confirmed**
- **CancelledByStudent**
- **CancelledByTrainer**
- **Attended**
- **FailedToAttend**

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.

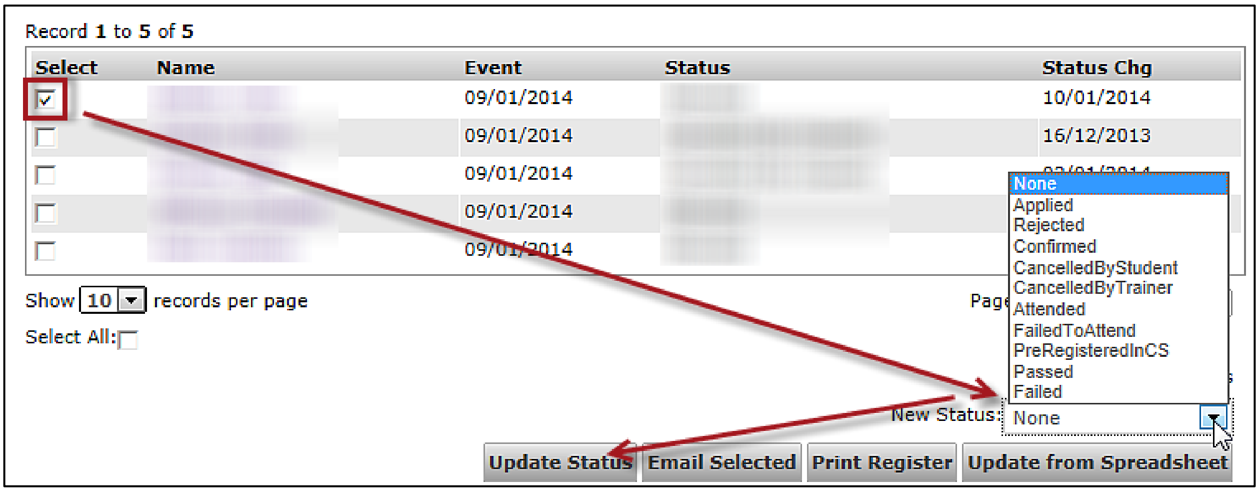


16.2 Selecting participants

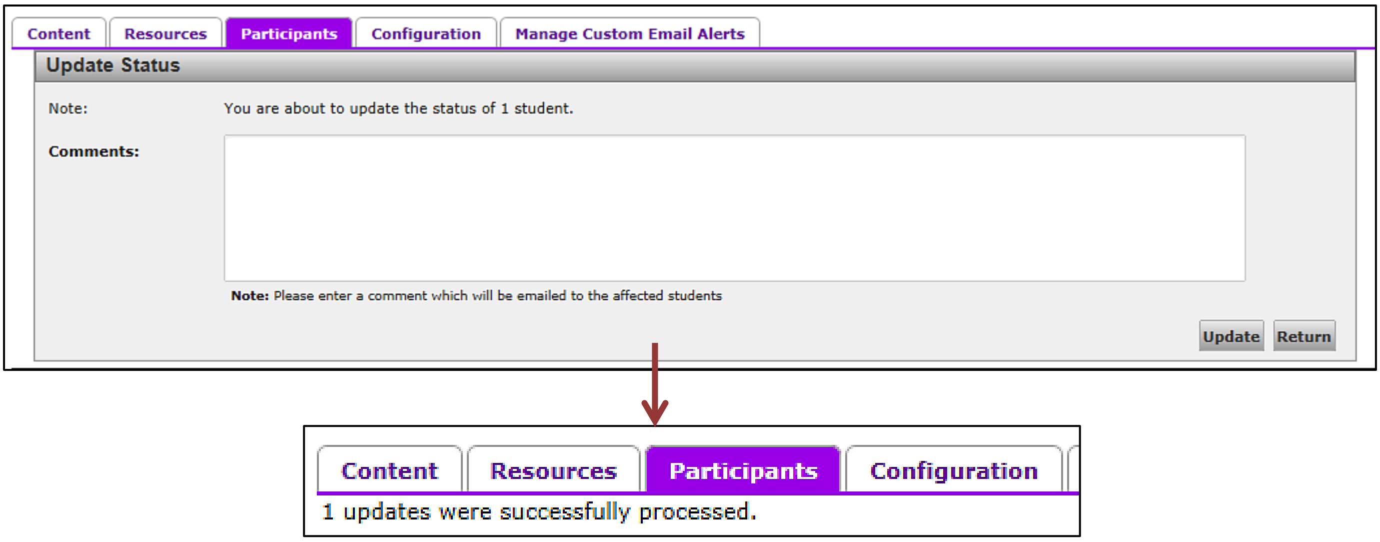
1. Using the **Select** check box you can remove the ticks against all the participants and individually tick the participants you wish to perform a function against, such as change their status(es) or email them etc.

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.



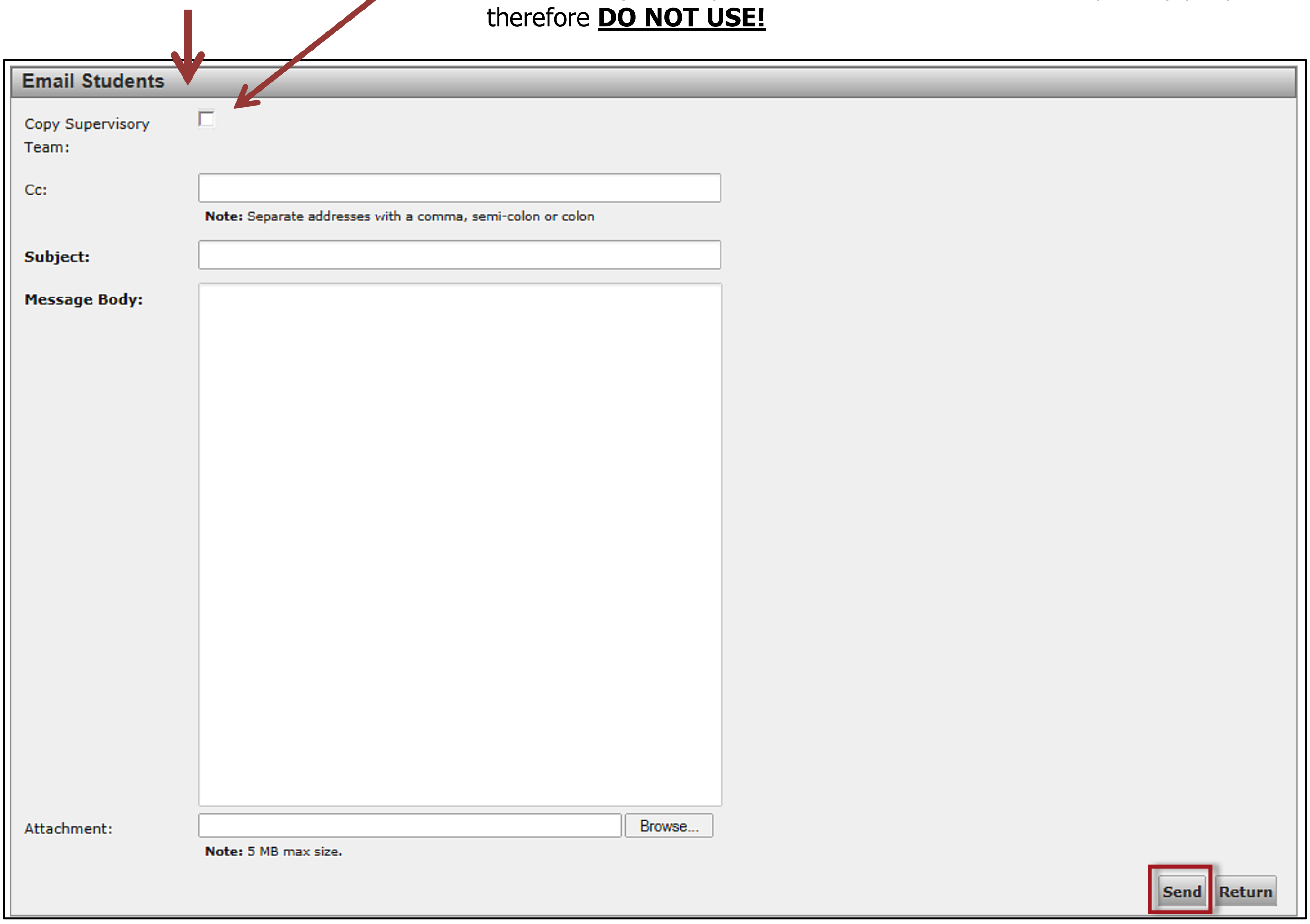
4. You will be warned that you are about to update the status of however many participants you have selected in the tick box – in the screen shot it is 1. Once you click **Update** you will be informed that those updates were successfully processed.



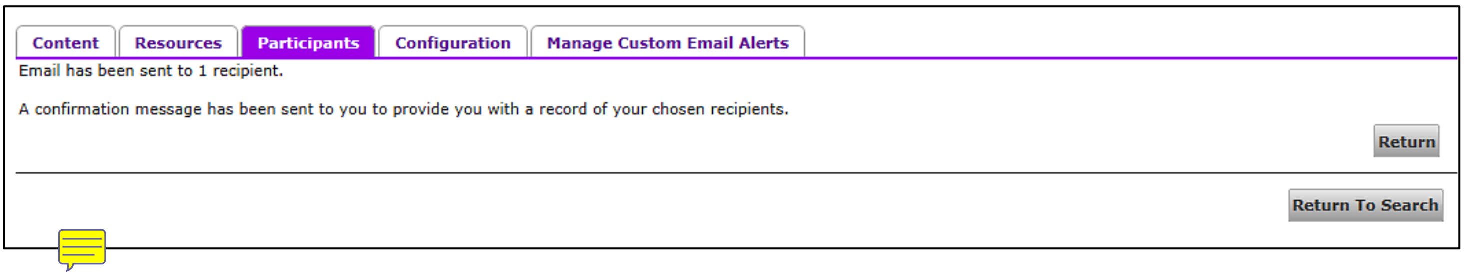
16.4 Emailing a participant

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!**



6. A confirmation of the email is displayed.



17 Uploading participants from a spreadsheet

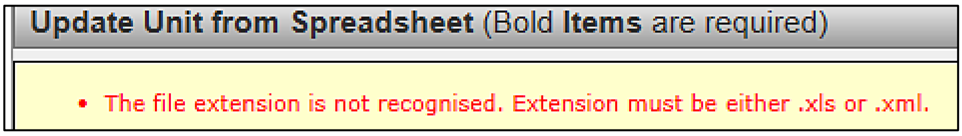
17.1 Excel spreadsheet necessities

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.

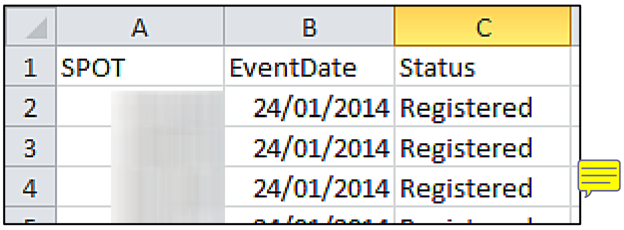
1. It is imperative that the spreadsheet you use to upload the participants has some specific criteria;

   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 *<u>not</u>* and **.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).



Uploading tips

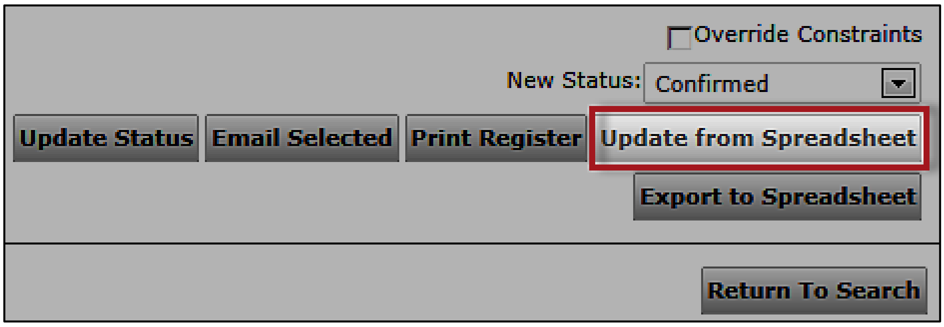
- **Please note:** – the most common bulk upload you are likely to do is a batch of people who are attending a course you are running in the future, or people who have attended a course you have already run and you are adding them retrospectively.

⚠ 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.

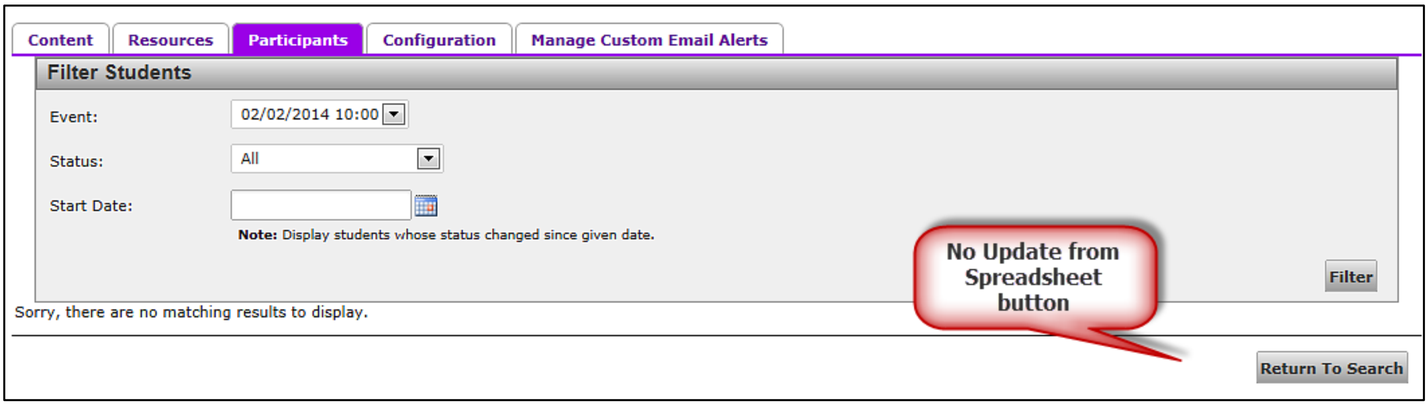
- When uploading people retrospectively that have <u>attended</u> the course, the **Status** iin the Excel spreadsheet needs to reflect this; **Attended.** You could upload them as **Registered** initially and then manually alter them to **Attended**, however, uploading them as **Registered** is likely 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.



17.3 Enabling the Update from Spreadsheet button

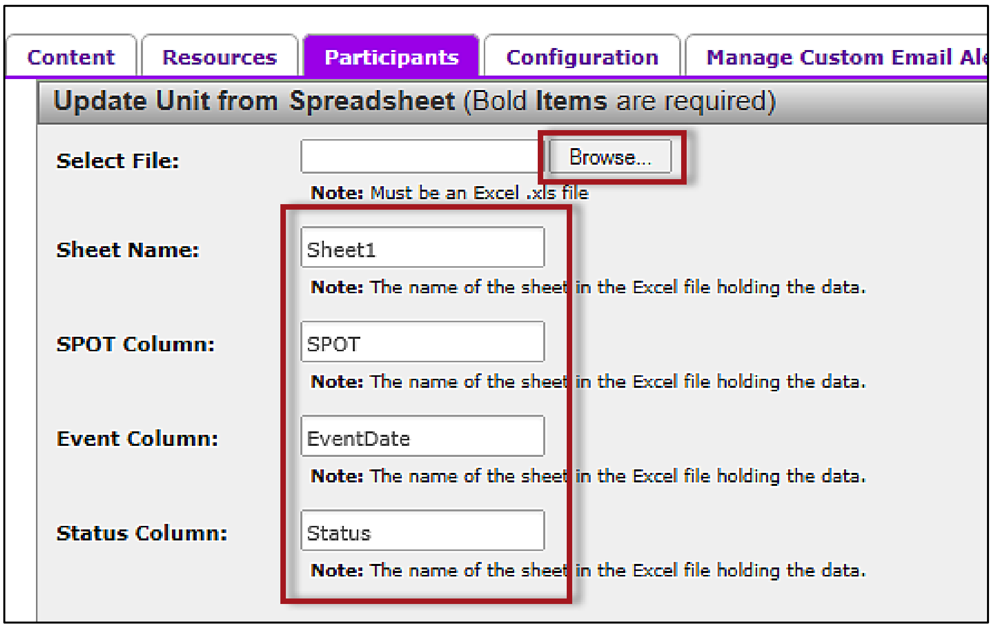
1. To enable the **Update from Spreadsheet** button a person needs to be booked on the course and you can use yourself as a candidate. Simply return to the **Content** tab, scroll to the bottom and **Apply** to the appropriate course – you will get the confirmation email etc. Now that you are on the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

⚠ 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

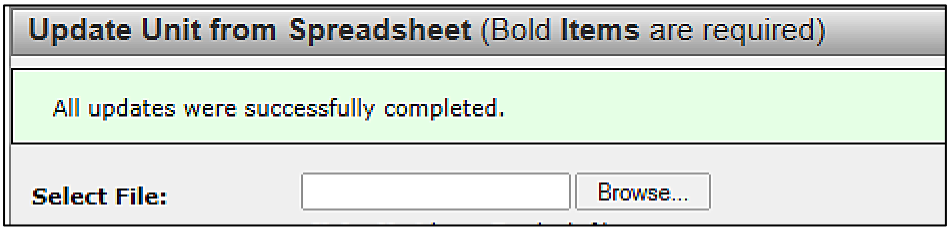
1. Click on the **Update from Spreadsheet** button.

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**.



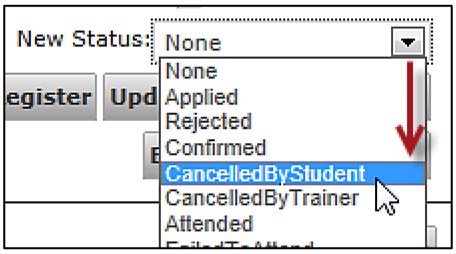
3. Click on the **Browse** button, locate your file and double click. Note that in the screenshot the Excel workbook is called **Book1** but the name of the sheet it contains *must* be called **Sheet1.**

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.



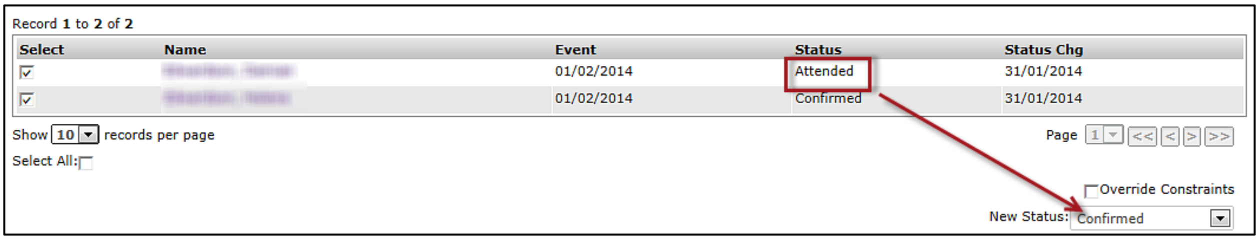
5. If you wish to do the same retrospectively with people who *attended* a course, use the same Excel spreadsheet, input the necessary SPOT ID's, the correct date and ensure the **Status** is **Attended** and follow the same procedure.

ⓘ *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).*



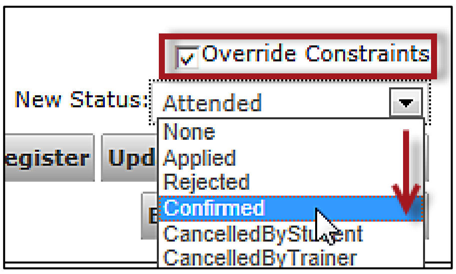
17.5 Status errors

1. If you accidently 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.



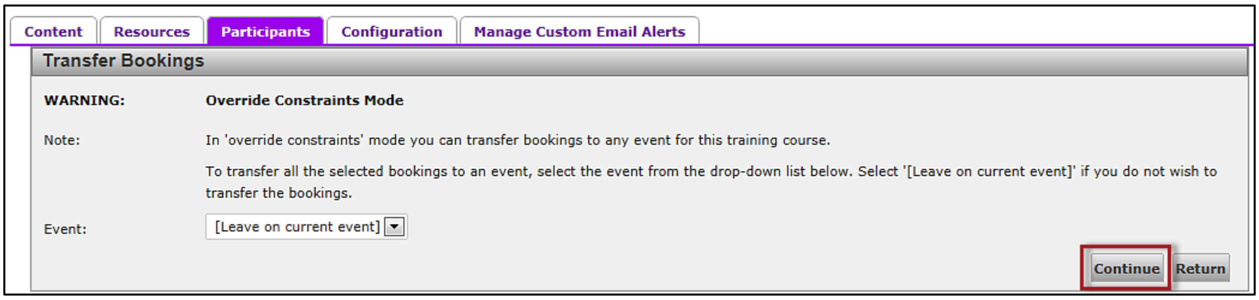
2. If you leave the status as 'Attended' even though they are confirmed this could cause confusion after the event when you need to mark the participants' attendance, especially if people have *not* attended and you need to ensure you mark them as such.

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**.

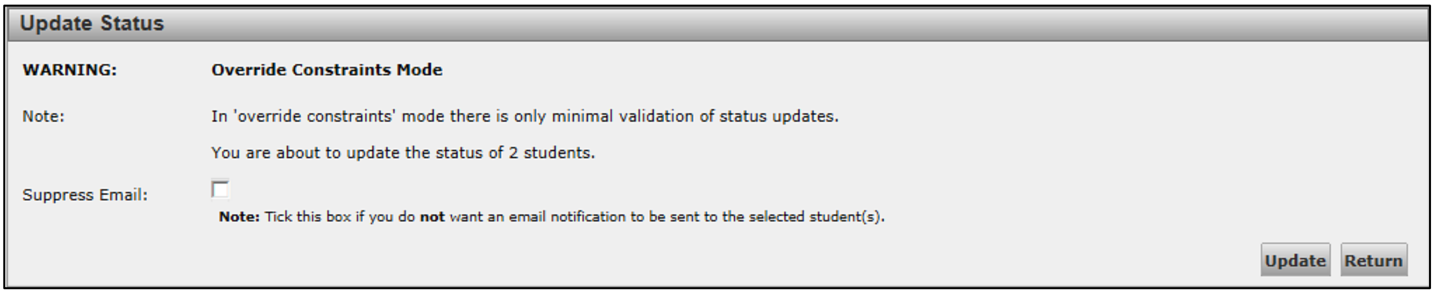


4. You will be warned that you are in **Override Constraints Mode** and that you can transfer the people onto another event for this training course – in that instance you can choose the alternative event from the **Event** drop down menu (especially if you had uploaded them on to the wrong event) or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

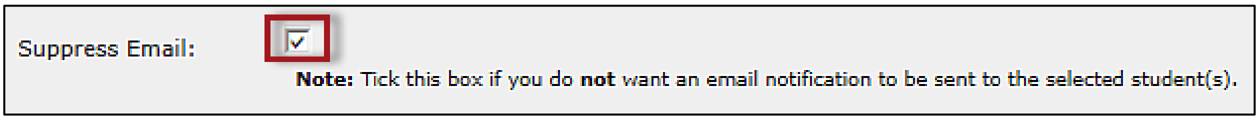
5. Click on **Continue**.



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.**



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



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.

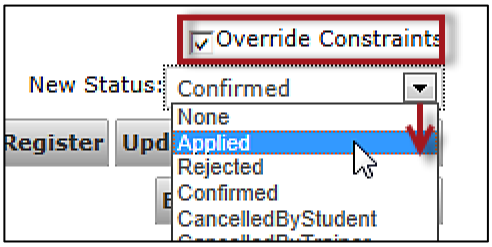
Once you have created and configured your course retrospectively you will see that if there are future courses running you will be able to apply for them, but <u>not</u> for the course that has already run – in this instance you will need to make an application as yourself onto a course that is running 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.

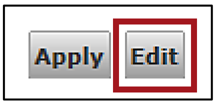
Having seen the processes that need to be completed for such events it might be worth taking the time to ensure events are set up in the Training Catalogue prior to their scheduled date to eliminate the extra legwork this entails.

20 Event Details Adjustment

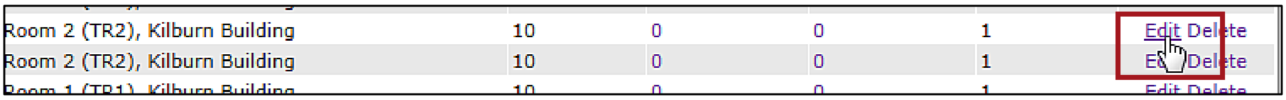
There may be a time when you have to make adjustments to an event such as a change of date, time or venue etc. and there may be attendees already booked on to the course that need to be informed of this change.

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.

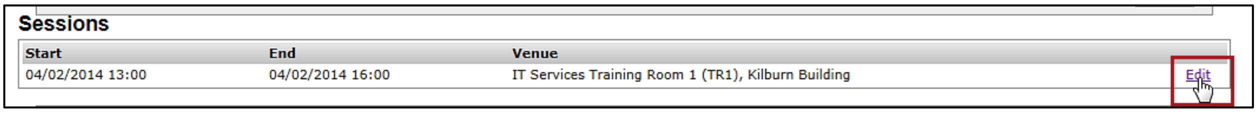
1. In the **Content** tab, near the bottom under list of events click on the **Edit** button.



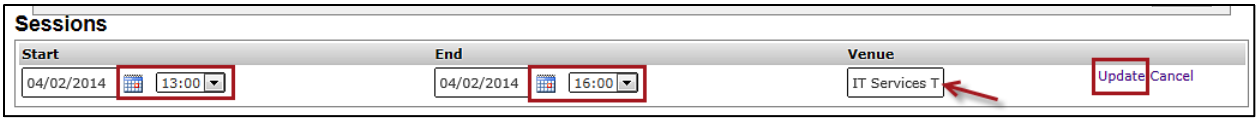
2. From the list of events, locate the one you wish to edit and click on the **Edit** link on the right hand side.



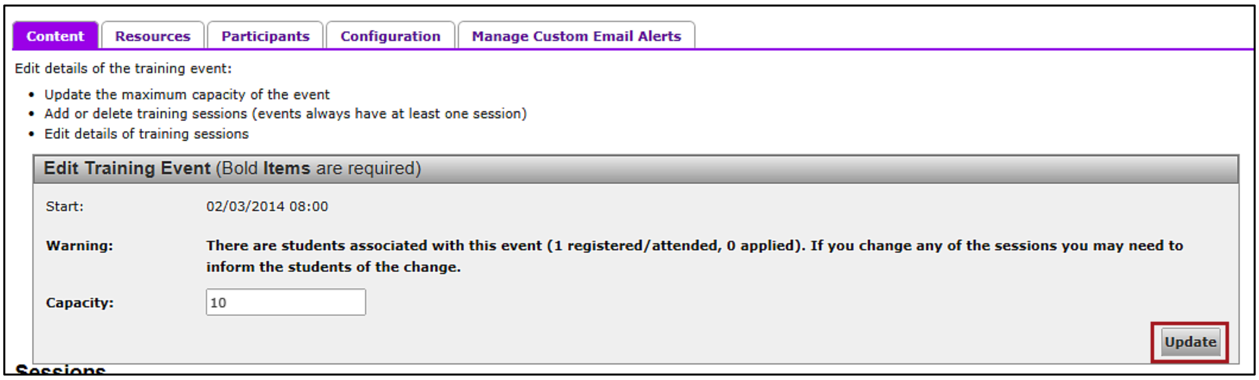
3. The individual session will be displayed, click on the **Edit** link on the right hand side.



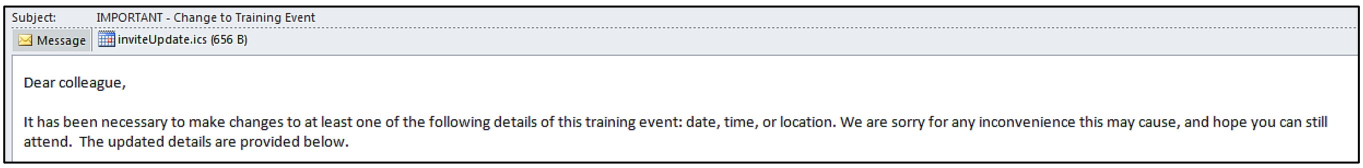
4. You can now change the **Start** date, **End** date and **Venue** – once this is done click on the **Update** link on the right hand side.



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



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



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.

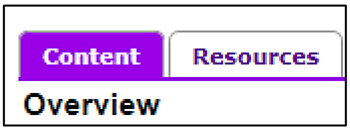
2. Click on the course.

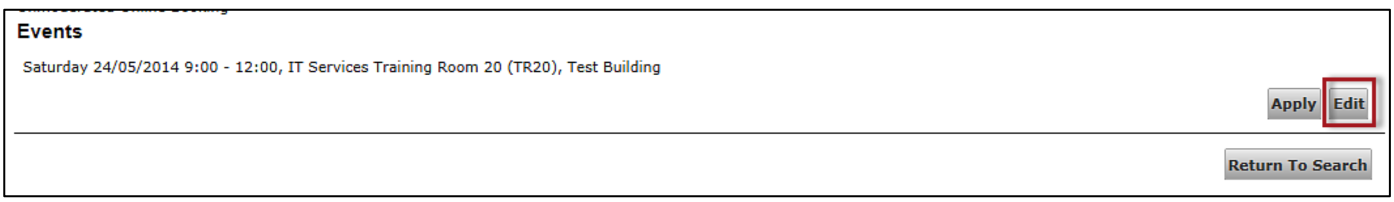
⚠ **If there are people still on the course with a status of Confirmed/Attended you will be warned and the event will <u>not</u> be deleted.**

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

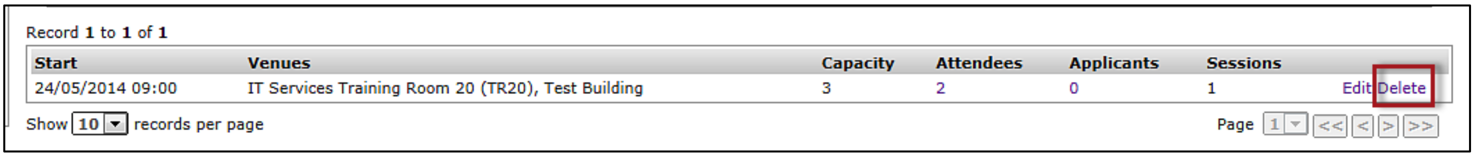
➢ **If you do still have people on the course the following documents the scenario:**

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.

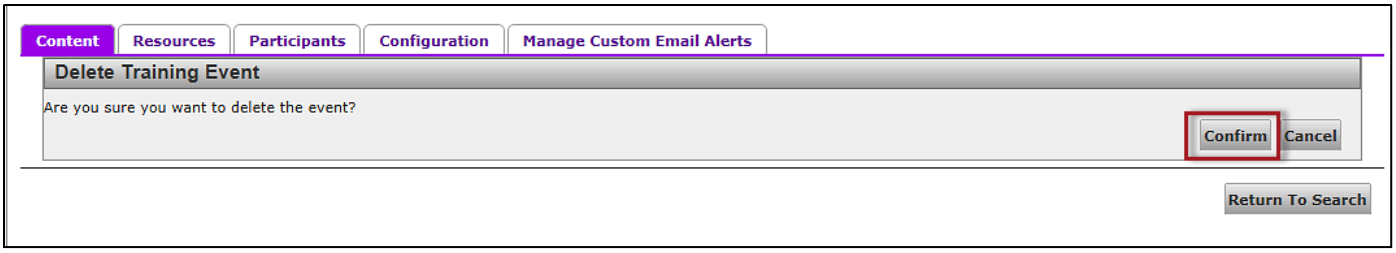




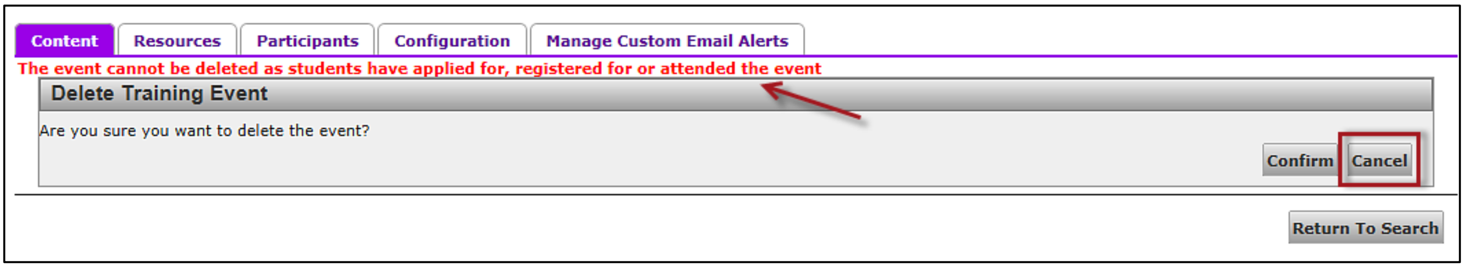
4. All the evens for this course will be listed accompanied by an **Edit** and **Delete** link. Click on **Delete** against the course you wish to remove.



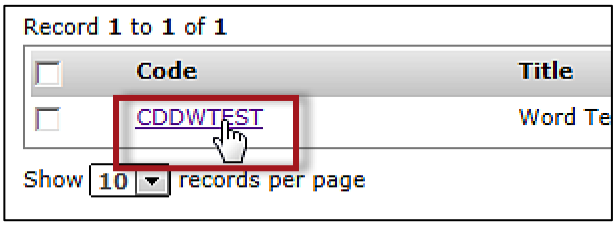
5. You will be prompted to **Confirm/Cancel** this action. Click on **Confirm**.



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

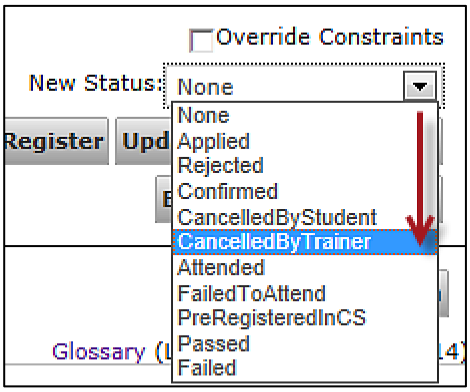


7. Click on **Cancel** and instead click on **Return to Search** and select the course again. You will need to cancel the participants before you can proceed with the deletion of the event.



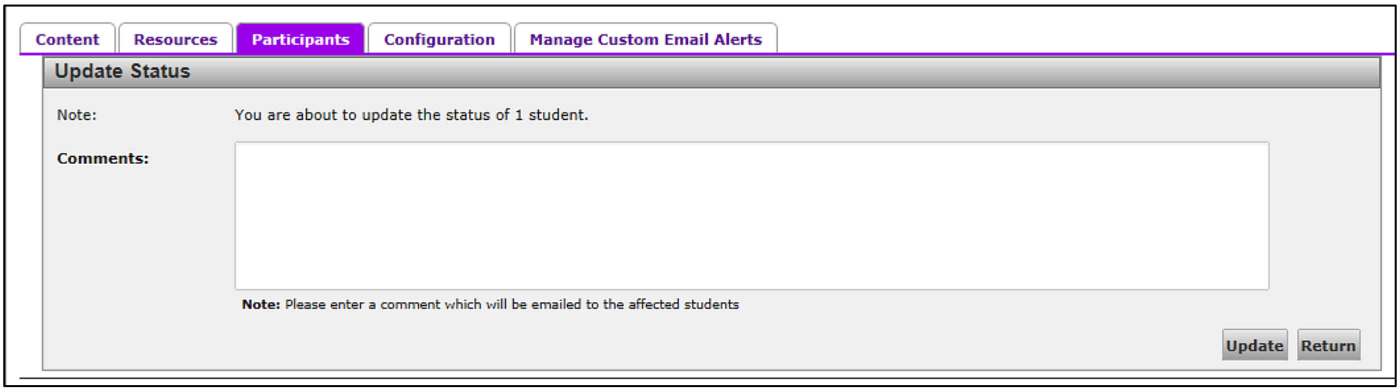
22 Deleting an Event – candidates removed

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

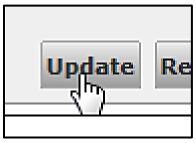


2. Click on **Update Status** and in the **Update Status** window you will be warned how many students you are about to update.

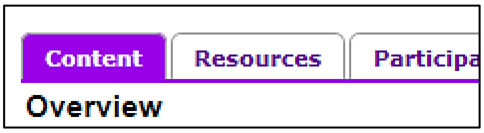
3. You can also insert a comment which will be emailed to the participants you are cancelling – this then enables you to explain the reasons behind why they are being cancelled off the course. You may well have already been in contact with the attendees (or you are going to follow up with a more thorough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

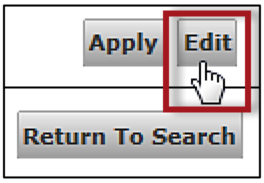


4. Click on **Update** and **OK**.

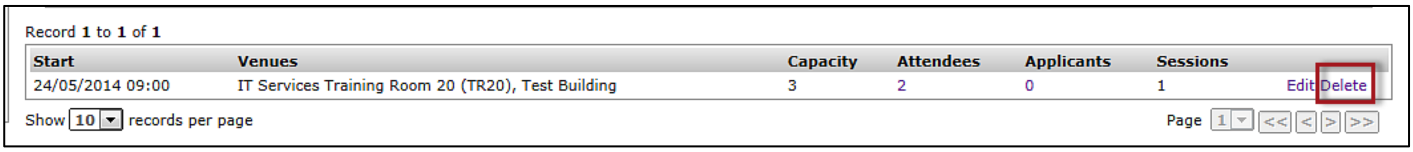


5. Return to the **Content** tab and click on the **Edit** button again at the bottom right hand of the page.

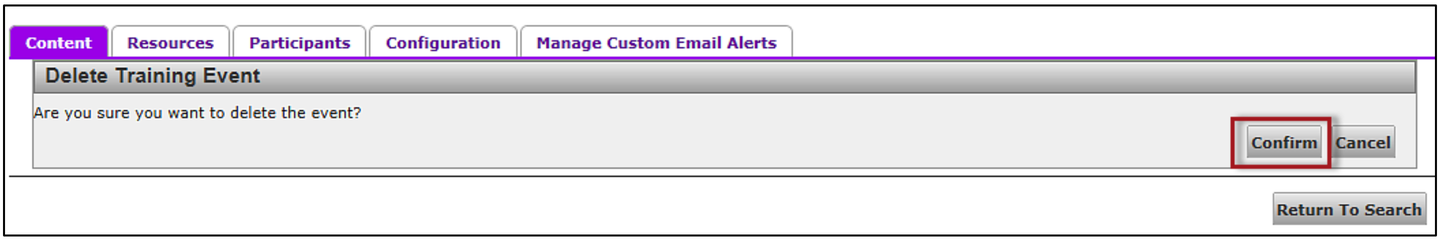




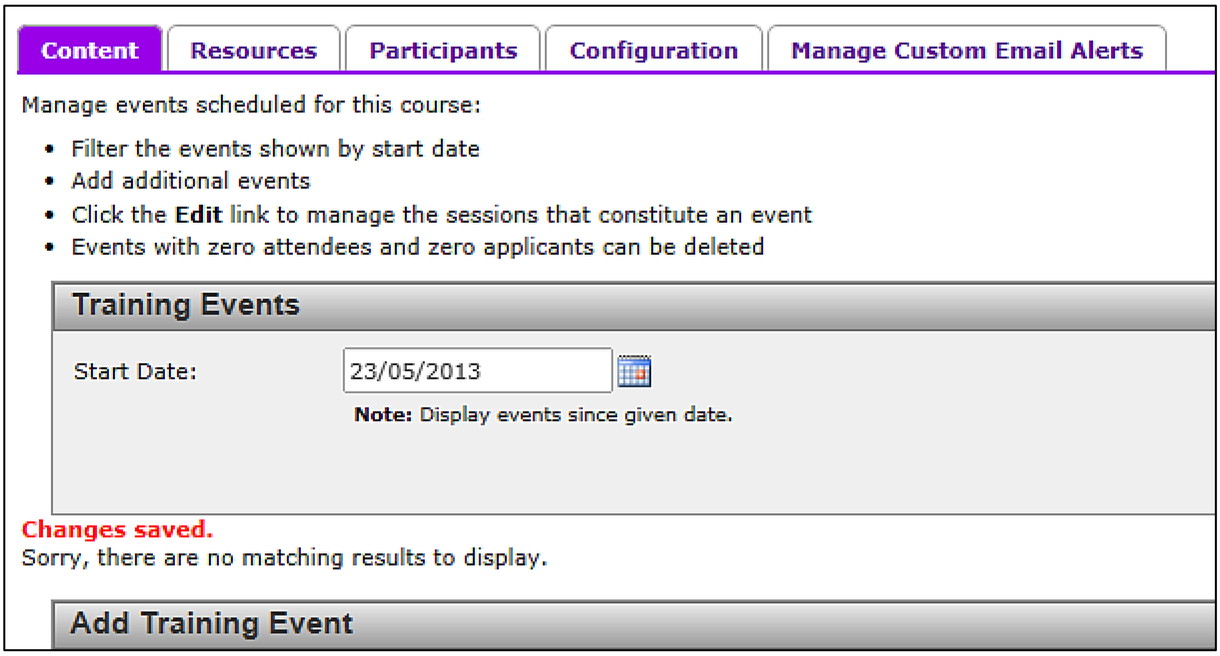
6. When the course is displayed with the accompanying **Edit** and **Delete** options, click on **Delete** again.



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**.



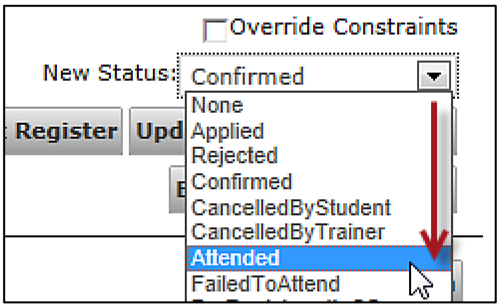
23 Changing Statuses

- 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**).

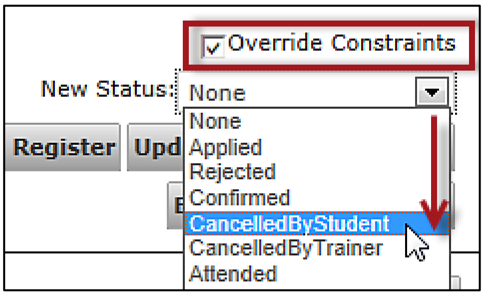
2. The **Failed To Attend** status generates an automatic email, informing the student that they have been sent this mail because they have been recorded as failing to attend, it also pulls in the course code, date, time and venue. The email also provides them with a link to the **Training Catalogue 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**.

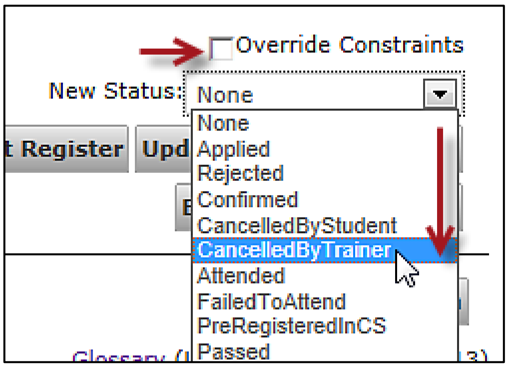


6. Click on **Update Status** and continue through the reminders of how many people you are updating until you get to **OK**. You will not generate an email for this change of status because you have completed it as if you were the student/s using the **Override Constraints** option.

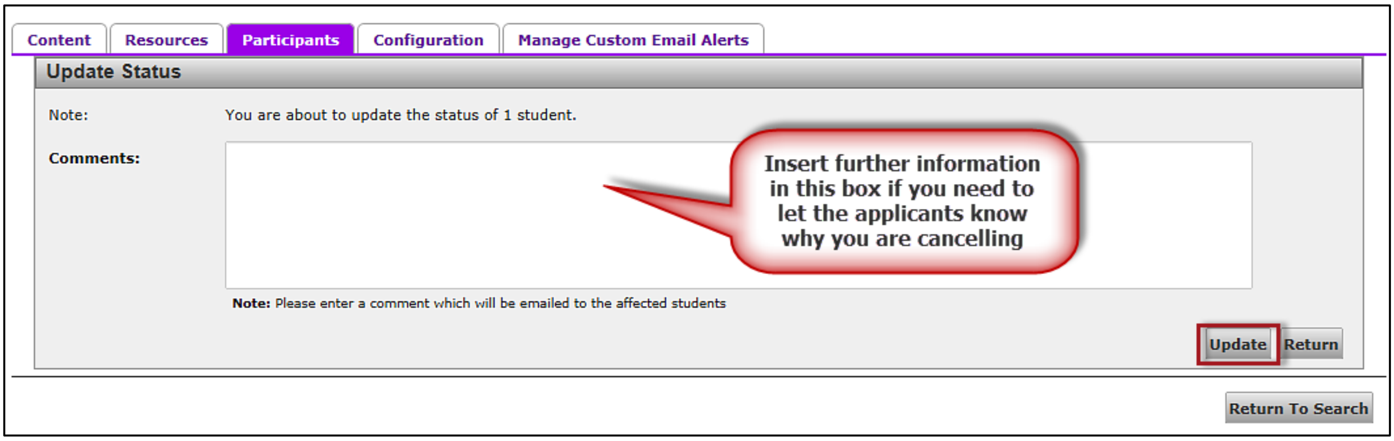
Select	Name	Event	Status
☑	[illegible]	04/02/2014	Cancelled (By Student)

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**.



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

☑	[illegible]	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.

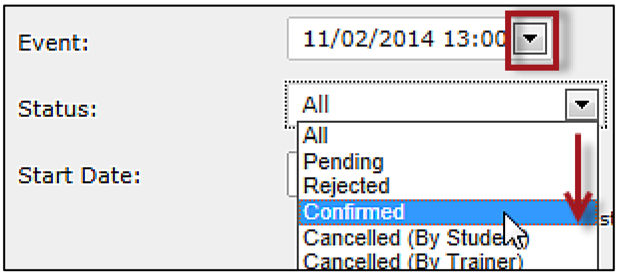
2. From the selection of available buttons click on **Print Register.**

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.***

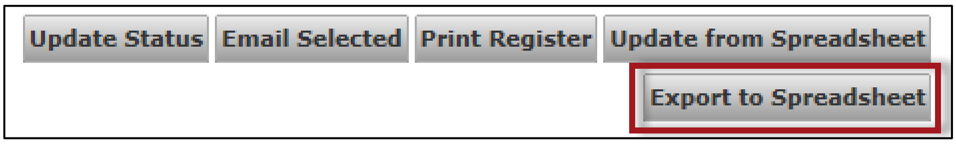
25 Exporting to Excel

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

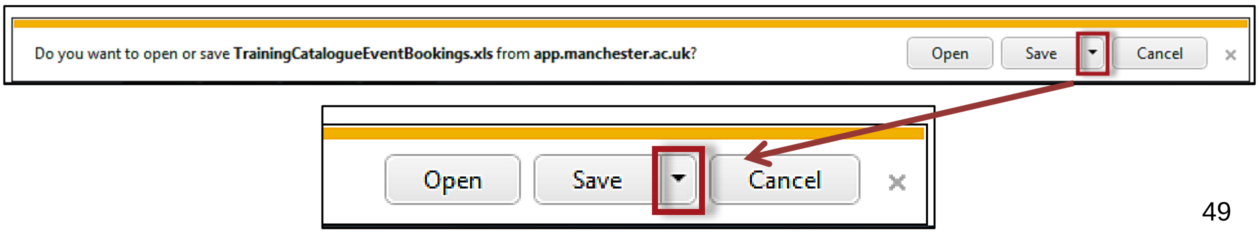
1. Prior to exporting, ensure you have selected the correct **Event**, and the correct **Status** (you may only want to export all the **Confirmed** attendees for example).



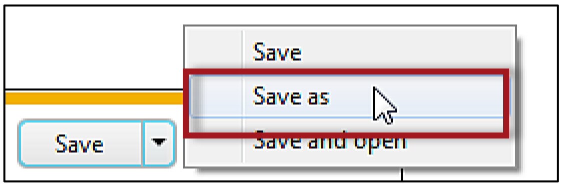
2. Once you have the correct filters in place, click on the **Export to Spreadsheet** button, underneath the list of attendees.



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.



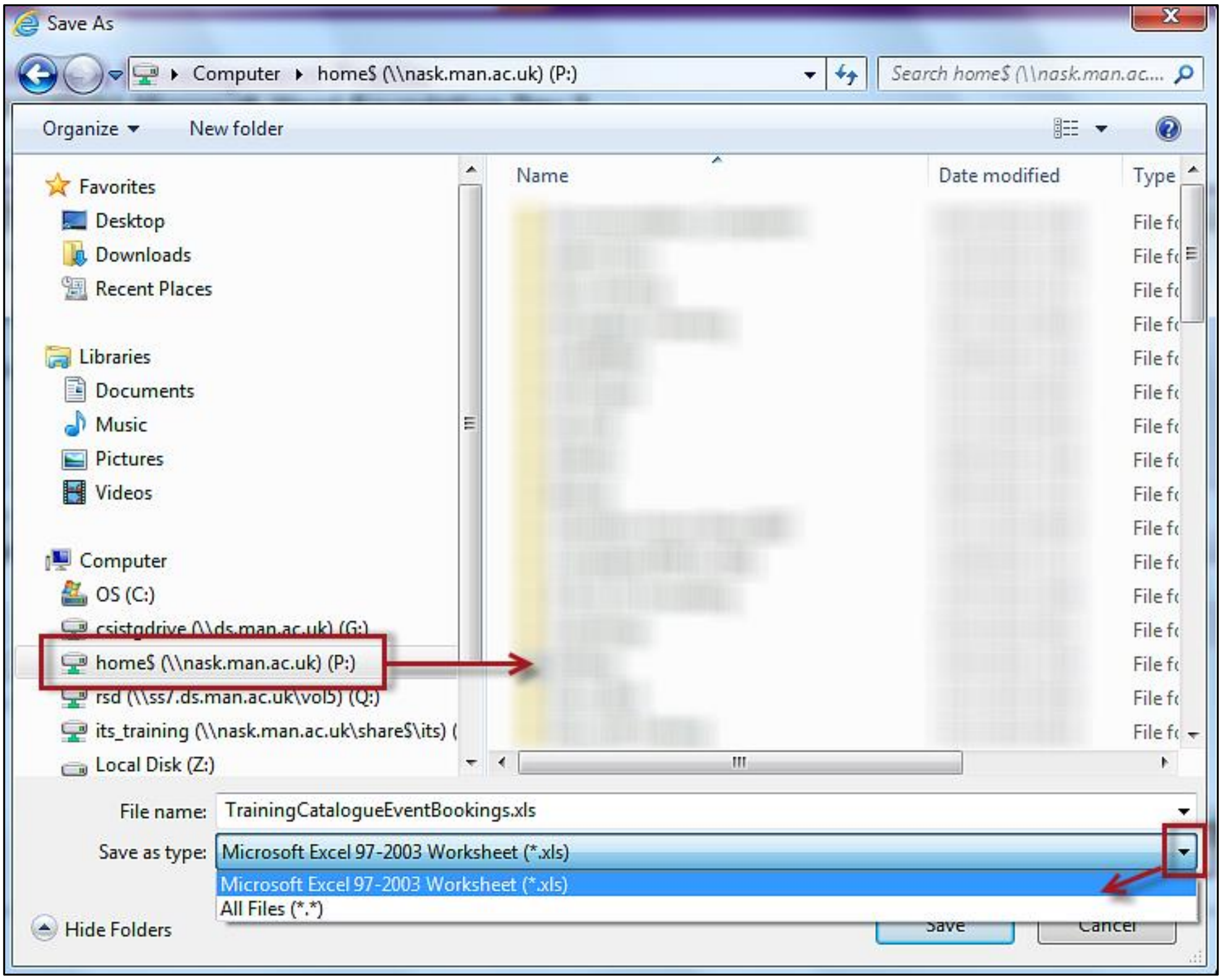
4. From the further menu choose **Save as** which offers you the ability to choose where you wish to save this exported data.



5. The **Save As** dialogue box opens, choose your preferred location – in the screen shot below the **P** drive has been selected.

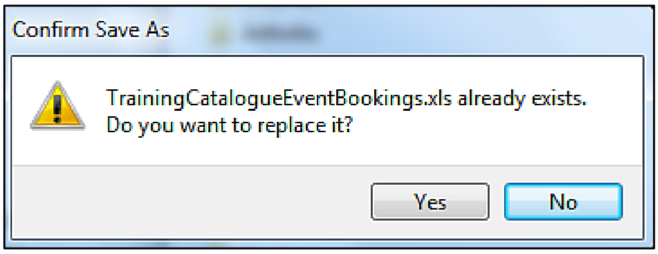
6. The **File name** is an automatic name generated by the Training Catalogue – you can change this if you wish.

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.

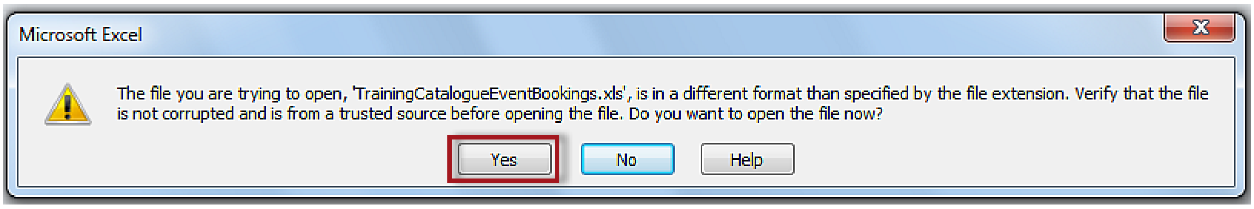


10. The bar at the bottom of the screen will tell you that the download has completed and you can now choose what you wish to do, or you can close this bar with the **x** on the right hand side and view your exported data when you are ready.

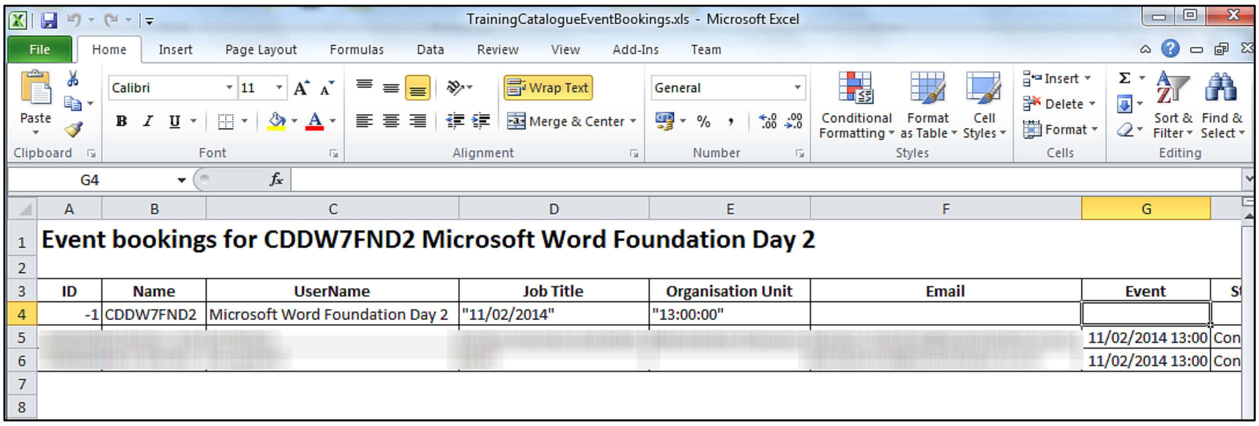
Note if you export any data from the Training Catalogue you must ensure you adhere to the University Data Protection rules. For more information please visit:
http://www.its.manchester.ac.uk/secure-it/datahandling/
See Encryption topic on page 53.

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.

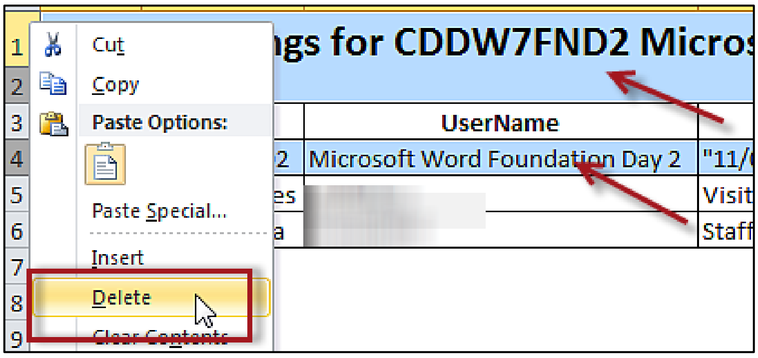


2. The Excel spreadsheet opens and looks slightly odd in its format. The title contains the course code and course name, then there are column headers and the line directly under the column headers contains slightly erroneous data. Followed by the list of attendees.



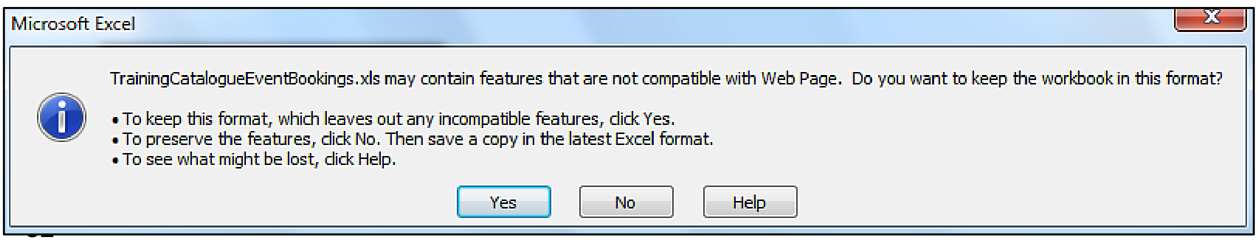
3. Remove any data you do not wish to see especially if you are subsequently using this data for a mail merge.

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.

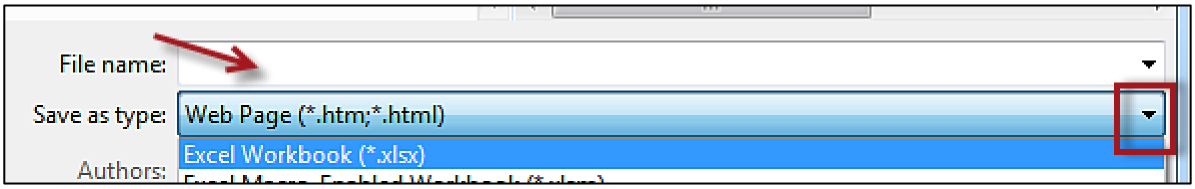
6. If you attempt to save this Excel spreadsheet you will be warned about compatibility. This is because when you export from Training Catalogue into Excel, the format is not Excel but remains as a web page.



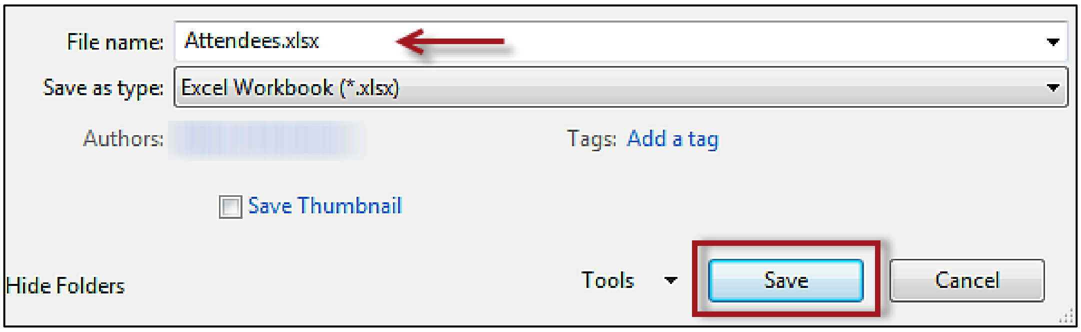
Although you would be able to use this for a mail merge, you would not be able to encrypt it. Therefore it is advisable to save it in an up to date Excel format.

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).



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



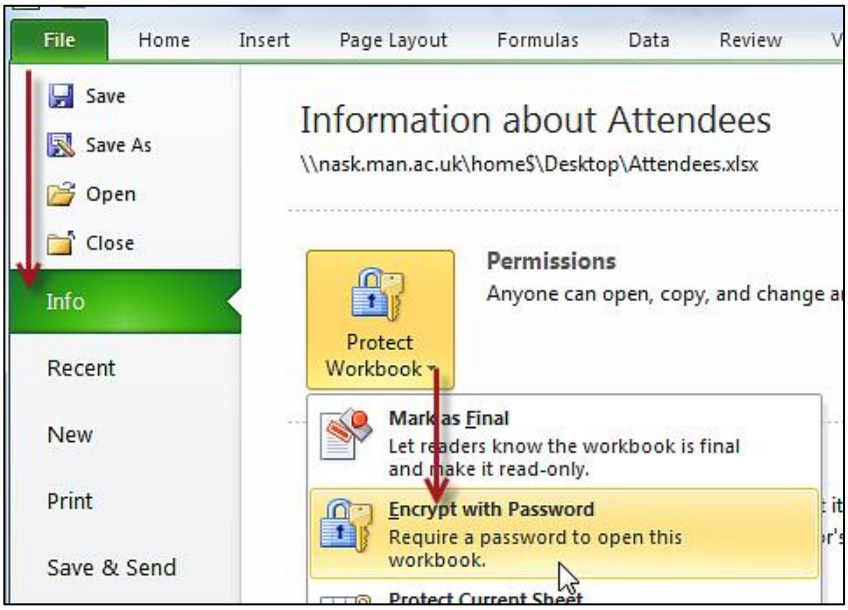
8. In this format you can now utilise it to create mail merges/produce registers and you can also encrypt it – especially if you are going to be transmitting this information in any way.

*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.*

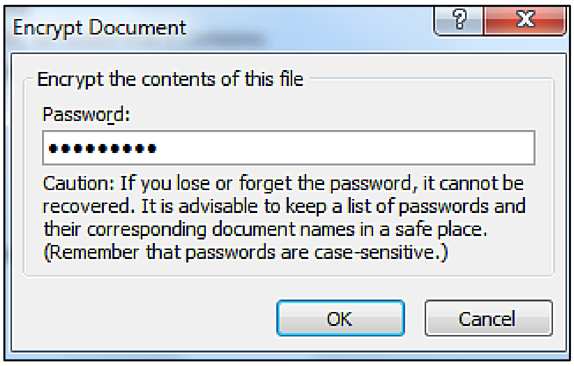
26 Encryption

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.

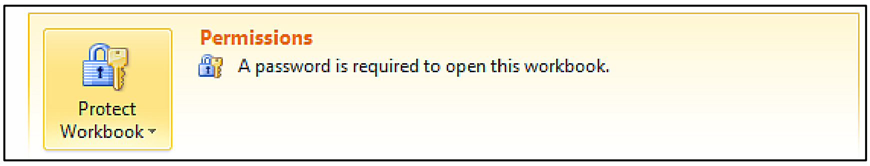
1. Whilst the Excel spreadsheet is open, navigate to the **File** tab. Info should be selected by default but if it is not click on it. From the options to the right click on **Protect Workbook** and from the menu choose **Encrypt with Password.**



2. 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.



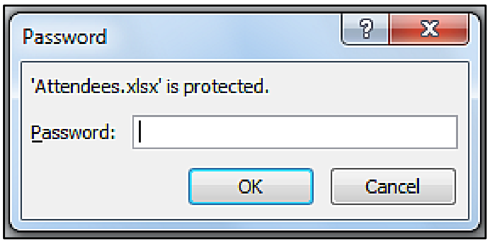
3. Once you click **OK** for the second time your Excel spreadsheet will be encrypted.



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

26.1 Removing encryption

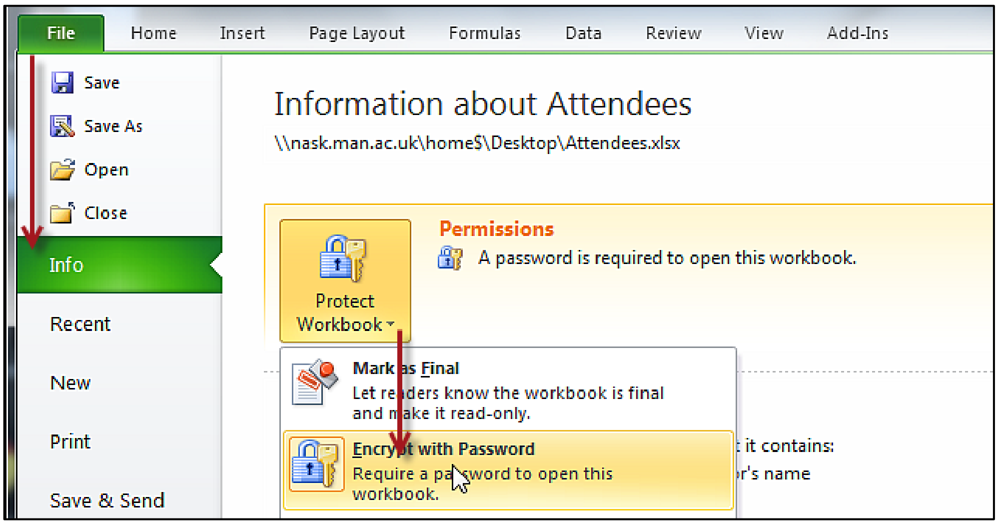
1. When you open a file that is encrypted, you will be faced with the **Password** box in which you will need to enter the relevant password correctly to open the file.



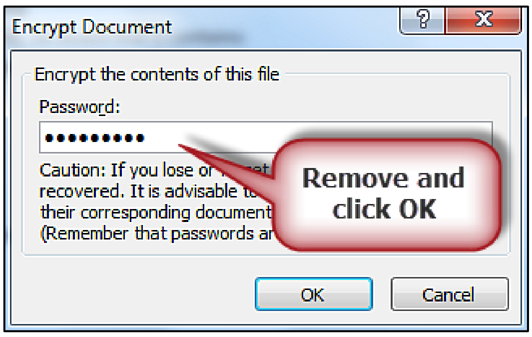
2. When you exit this spreadsheet it will prompt you to save again and the encryption will remain on the document for the next time.

3. 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.

4. 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**.



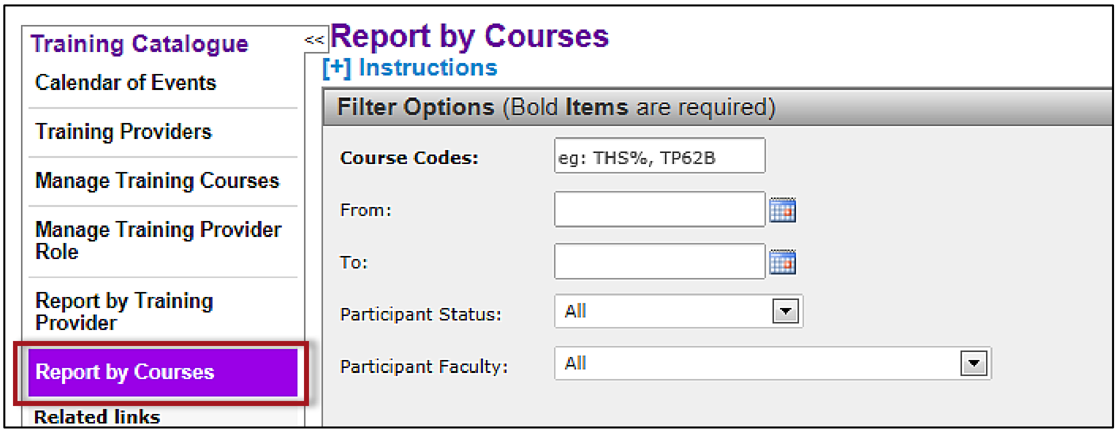
5. The **Encrypt Document** dialogue box opens already populated with the password. Remove the password and click on **OK** and that will immediately de-crypt the document.



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

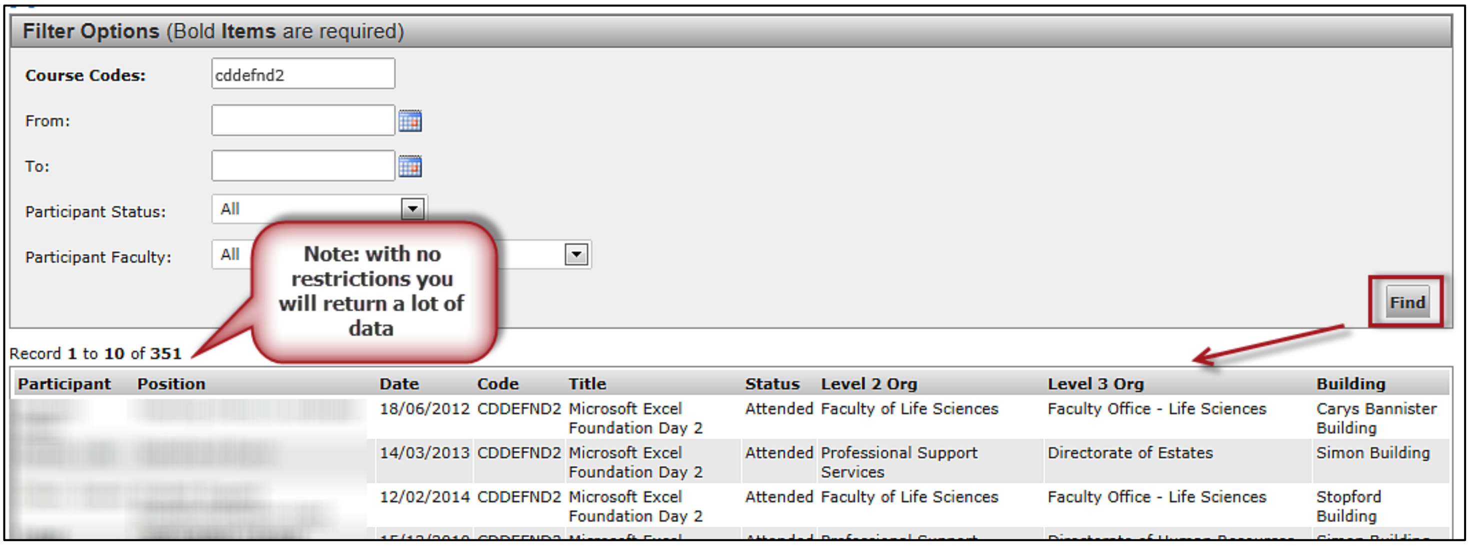
27 Running Reports

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.



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.

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.

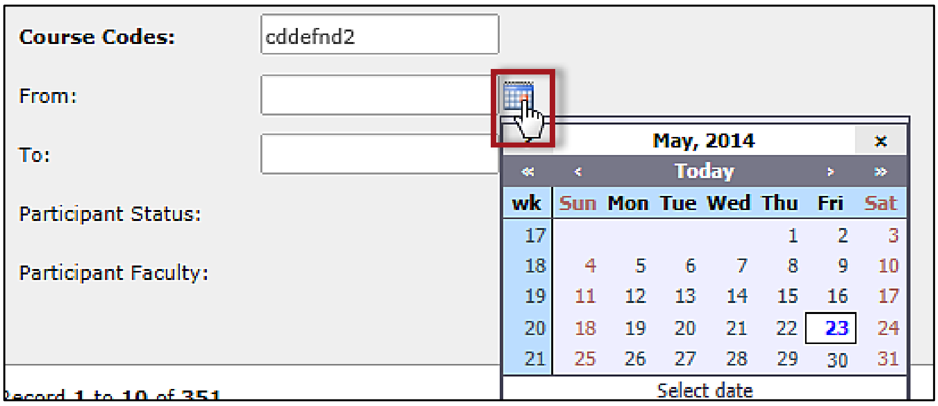


4. To make your report more useful, make some filtering selections as appropriate.

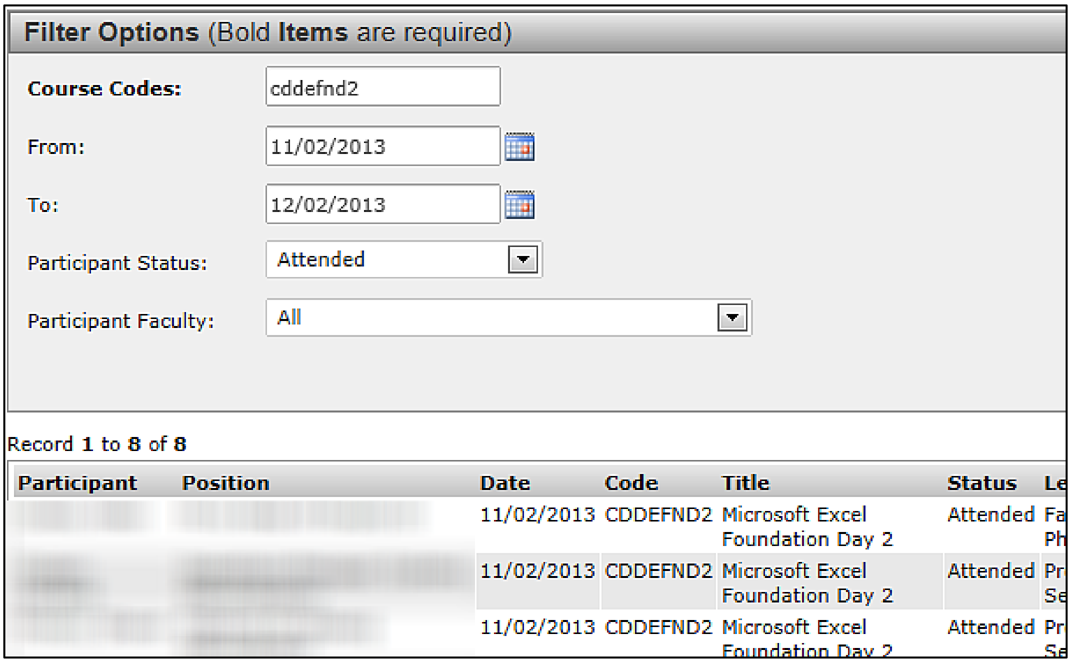
If you wish to filter between two dates utilise the calendar function to choose a **From** and **To** date.

Please note: The **Date To <u>must</u>** be the day **<u>after</u>** 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 **<u>after</u>** the last session.

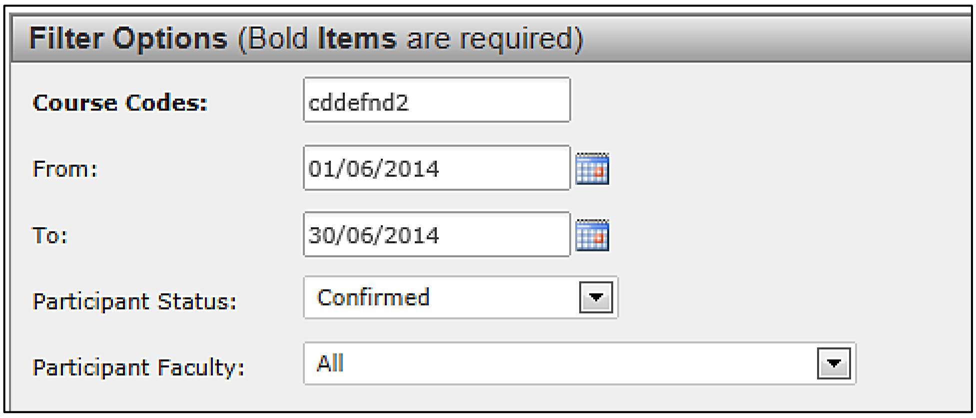


5. In the example below the course has been chosen, a session running on a specific date has been selected (note the day after has been inserted for the **To** date). The **Participant Status** of **Attended** has been selected but no **Faculty** has been chosen. The report runs against those filters.



6. You can export this data accordingly. 

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.

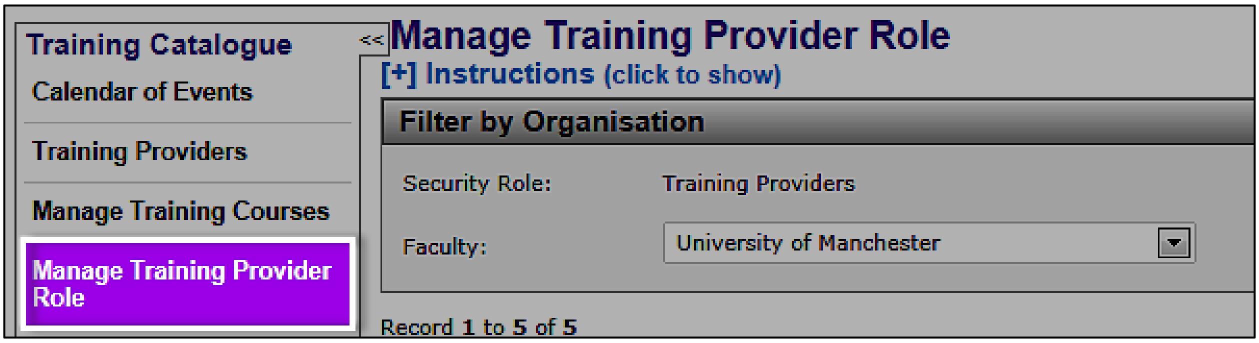


8. In addition you can utilise the option to see attended/confirmed etc. from specific Faculties as required.

*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.



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.

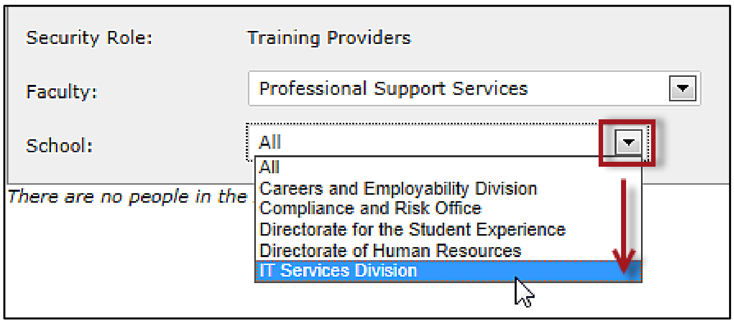
Professional Support Services:

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

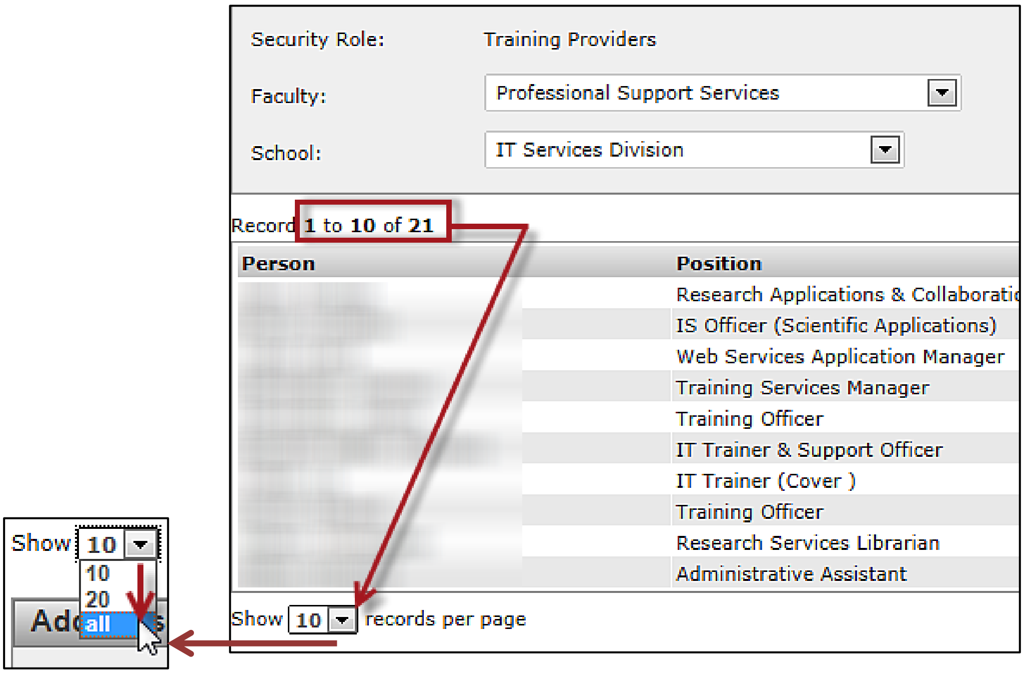
28.1 Viewing Training Providers

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.

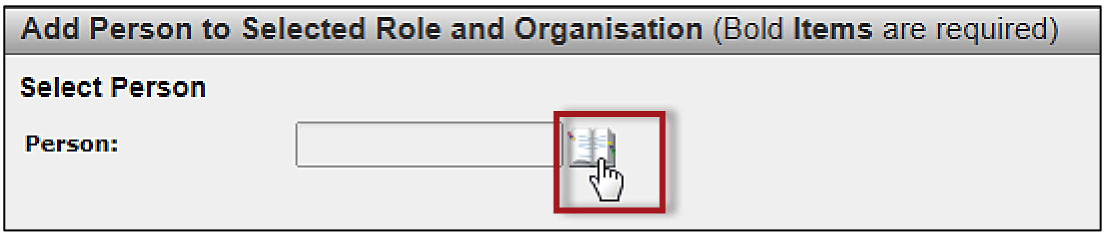


3. The members of that group will then be displayed along with their position. You will only be able to see the first 10 members, if there are more, the number of records are displayed on the top, use the **Show** drop down menu and choose **All**.

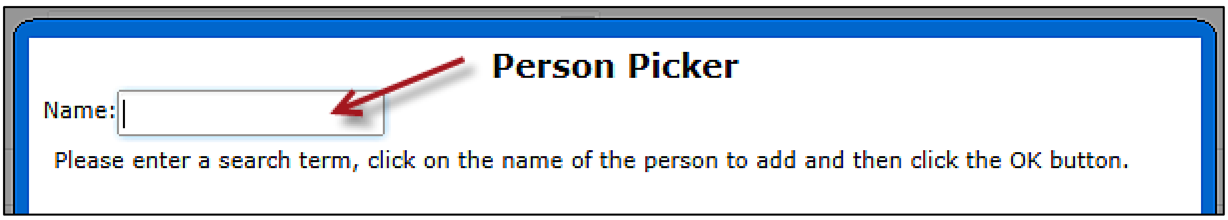


28.2 Adding a Training Provider

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



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



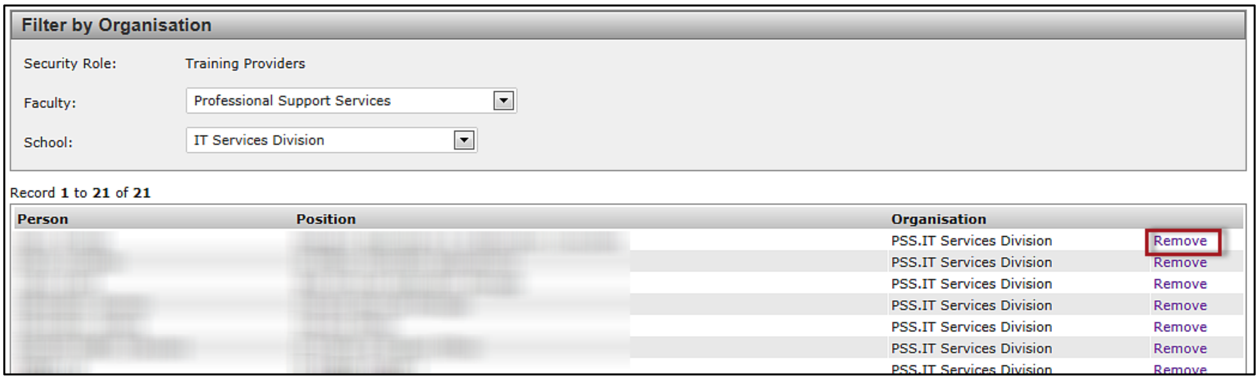
3. Choose the appropriate person in the list and they will highlight in blue, and then click on **OK** at the bottom of the window.

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

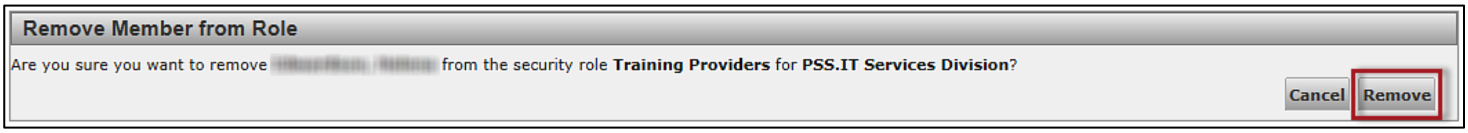
28.3 Remove a Training Provider

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!**



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

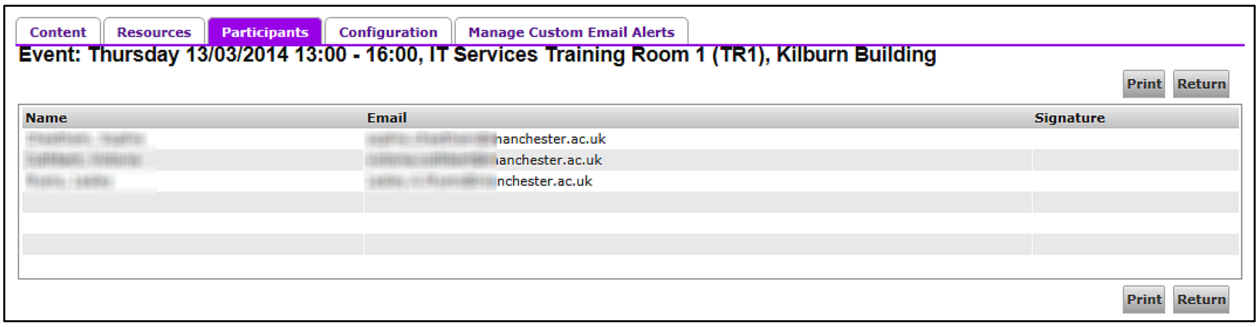


4. The training provider will then be removed from the group.

ⓘ ***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.*

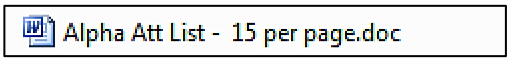
29 Producing Registers – external to Training Catalogue

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.



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.

ⓘ ***If you wish to have a copy of this Word document please contact IT Services Training Team; its.training@manchester.ac.uk***

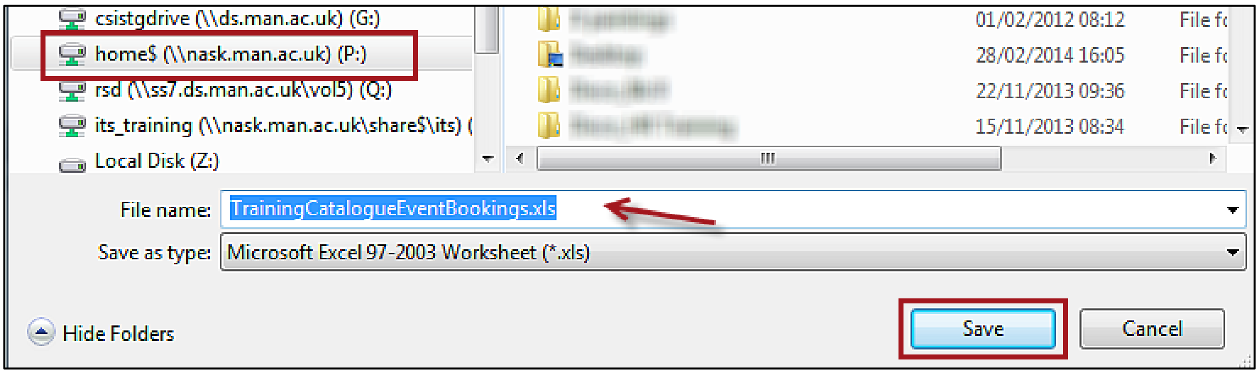
ⓘ ***When you have chosen a location to save the Word register, ensure you use the same location to place the exported the Excel spreadsheet from the Training Catalogue system containing the attendees to the course.***

29.1 Exporting the data

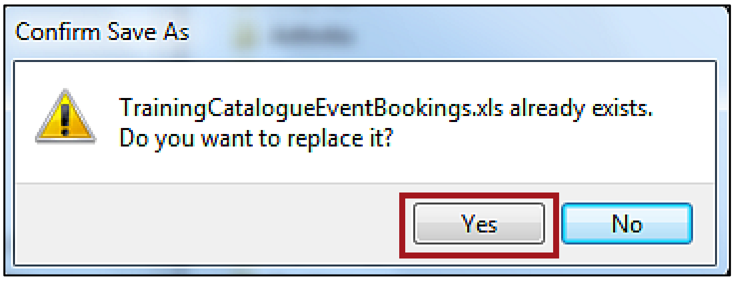
1. Locate the course and appropriate date, and ensure you filter the applicants to **Confirmed** before clicking on **Export to Spreadsheet**.

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**.



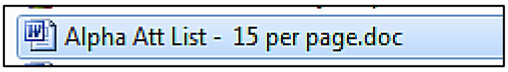
4. If you already have an Excel spreadsheet that you have exported from the Training Catalogue with the same name in this location, you will be warned. If you do not wish to overwrite this existing Excel spreadsheet you will need to click on **No** and re-name the sheet, or, choose a different location. 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

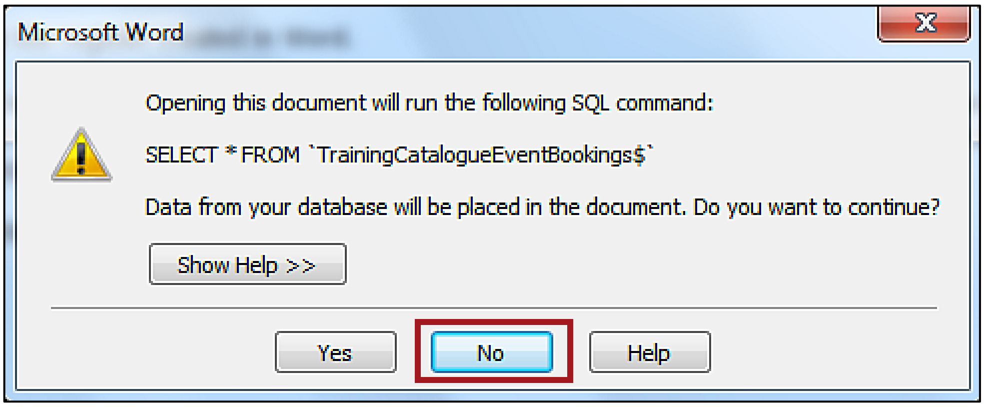
1. Locate the register created in Word.

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.

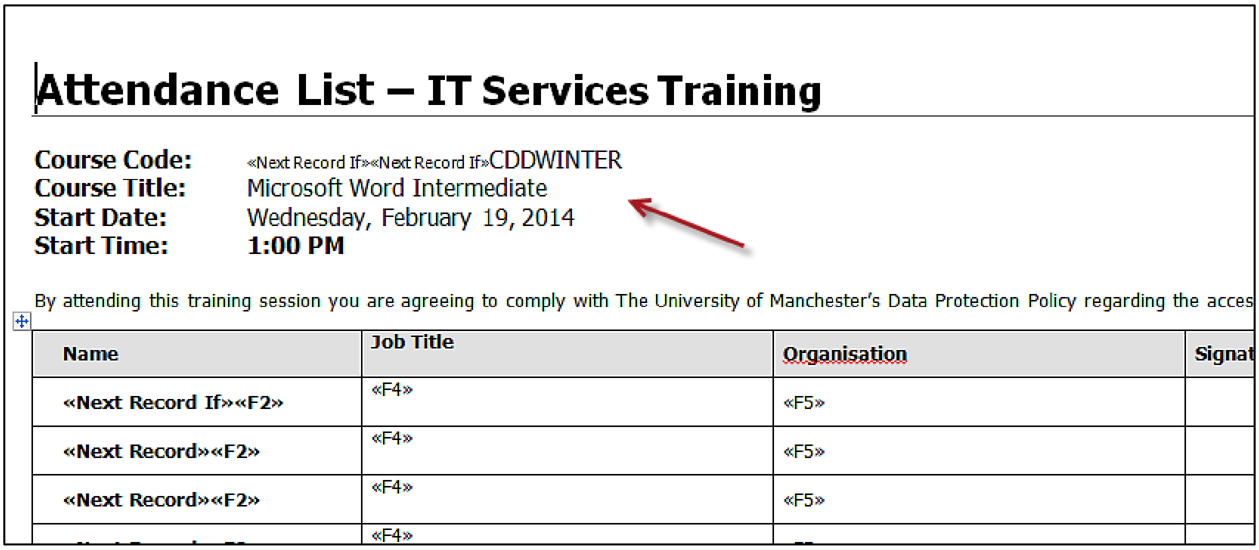
3. Open the Word document. 

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**.



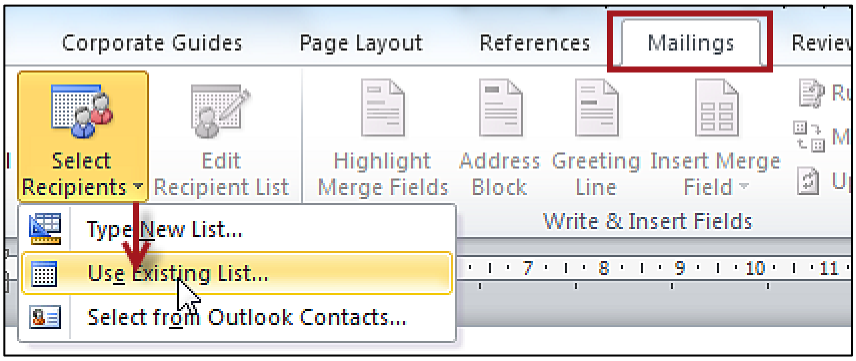
6. The register opens populated with some elements of the last data source that was used; you can now locate the data source you want.



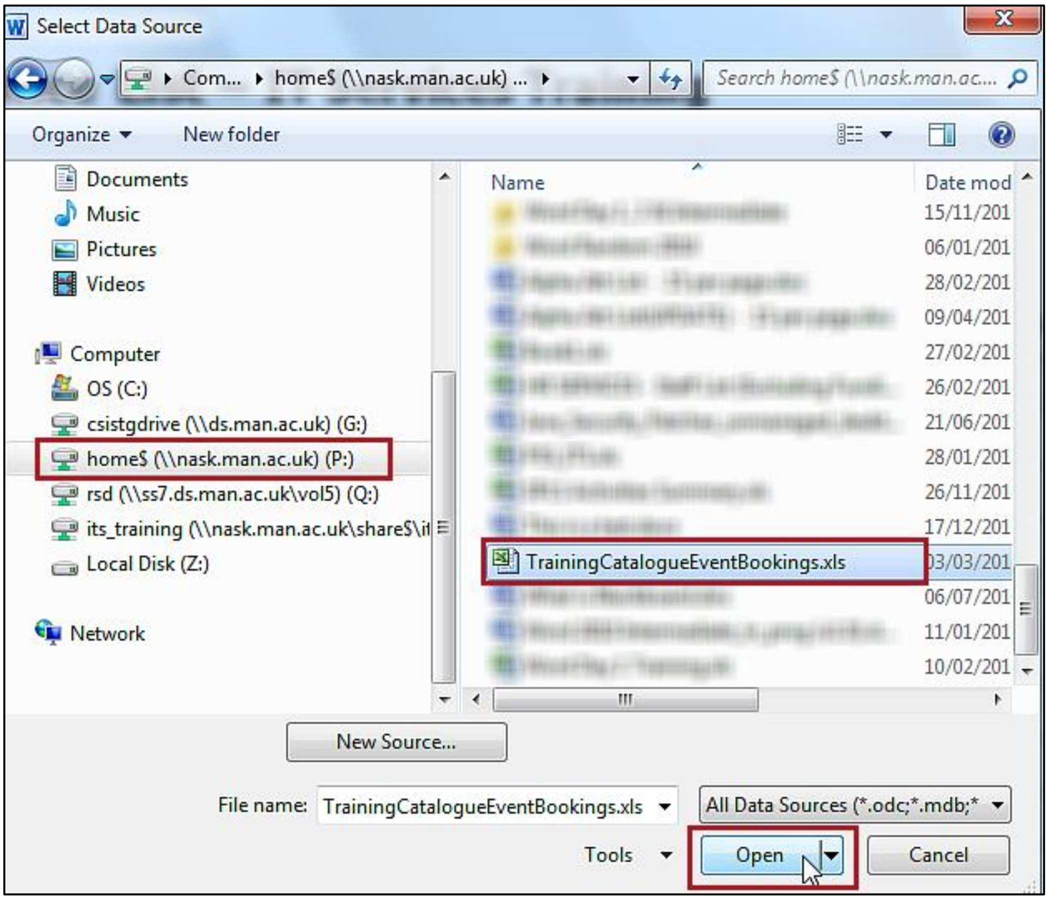
29.3 Locating the data source

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…**

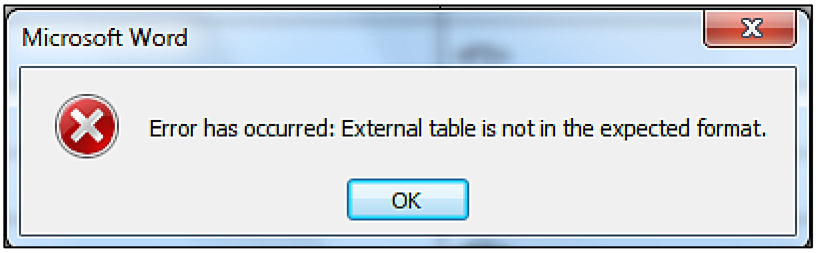


2. The **Select Data Source** dialogue box opens. Choose the location of the Excel spreadsheet and locate it in the window on the right. Either double click on it or click on it once and click on **Open**.



29.4 Opening errors

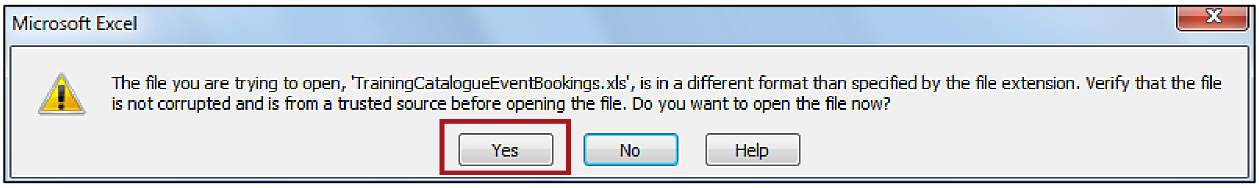
1. Without the data source open already you will encounter an error;



2. 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.

3. Click **OK** on the 'Error has occurred' dialogue box and duly cancel/close all other boxes that subsequently open.

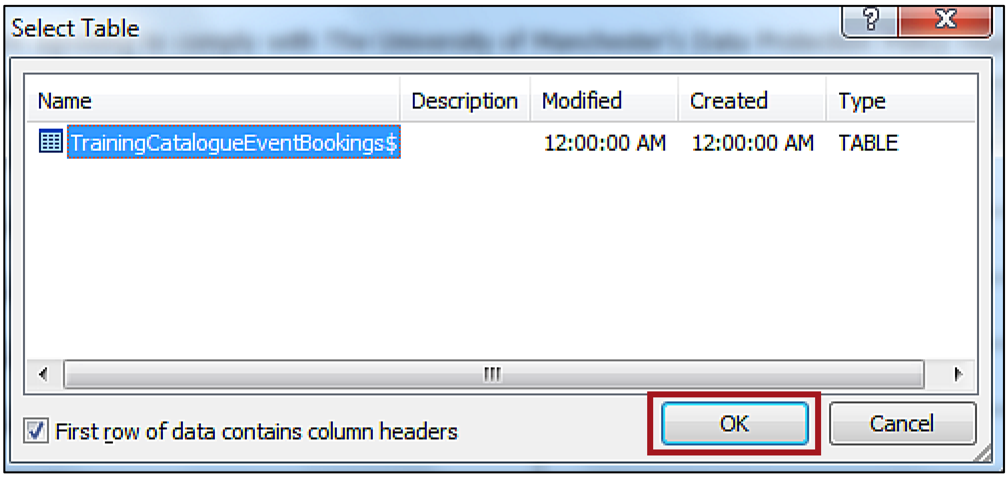
4. Locate the exported Excel spreadsheet and open it, the prompt is warning you that the file is in a different format to the file extension and asking you if you wish to open it. Click on **Yes.**



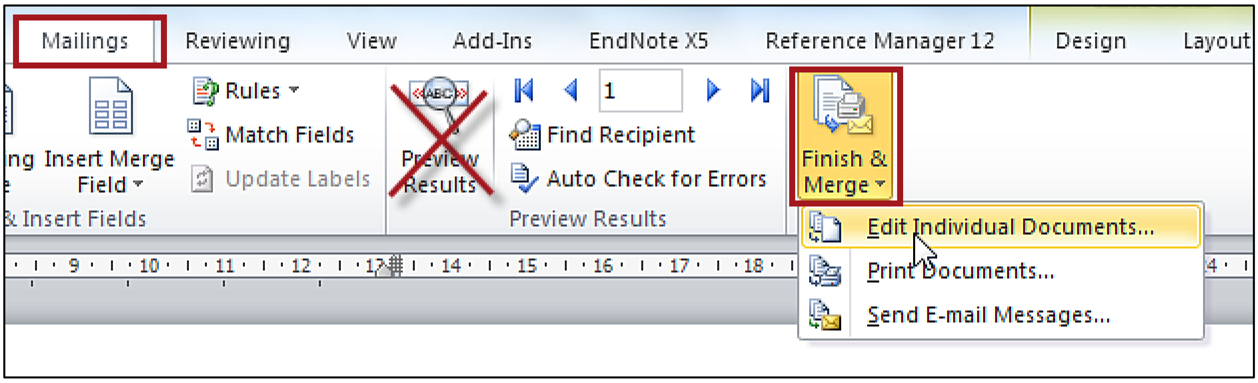
5. **Once the Excel spreadsheet is open minimise it to your task bar.**

6. 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.

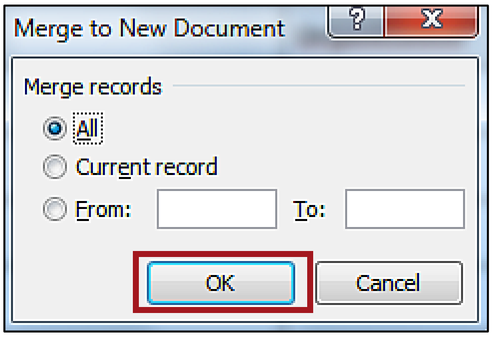
7. Instead of an error a **Select Table** dialogue box opens with the one spreadsheet selected. Click on **OK**.



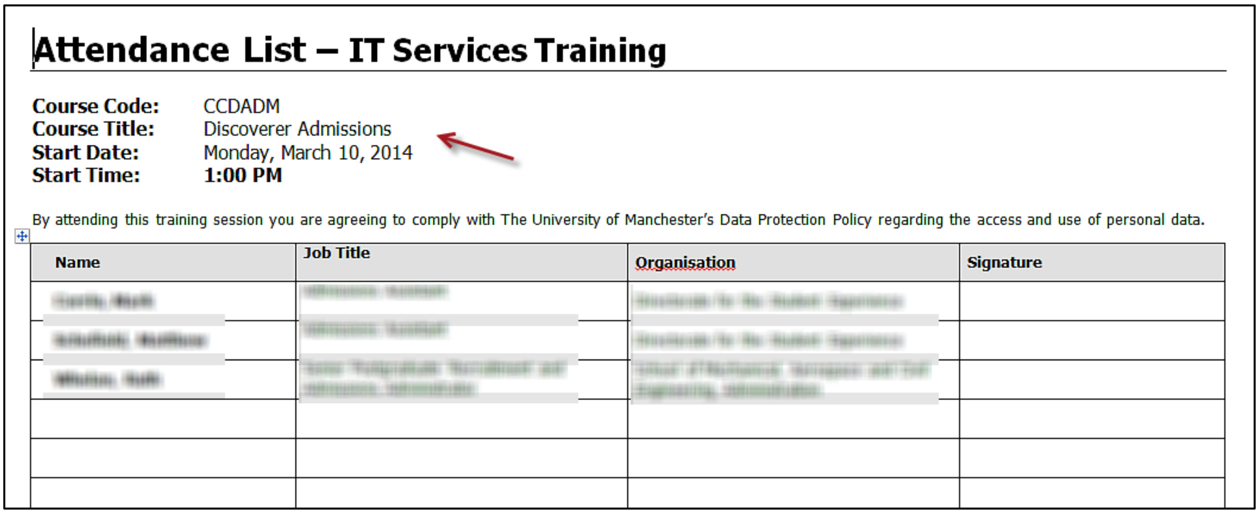
8. Don't attempt to **Preview Results** as the register will not look how you anticipate it to. Instead within the **Mailings** tab, click on **Finish & Merge** and choose **Edit Individual Documents**…



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**

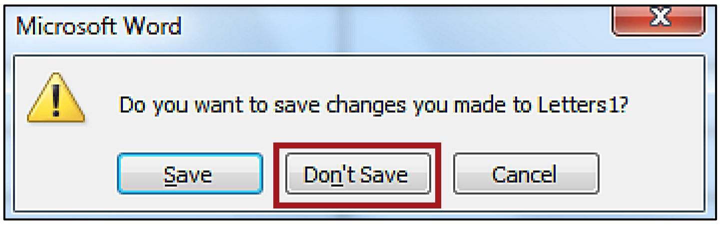
By attending this training session you are agreeing to comply with The University of Manchester's Data Protection Policy regarding the access and use of personal data.

Name	Job Title	Organisation	Signature

29.5 Printing, saving and closing

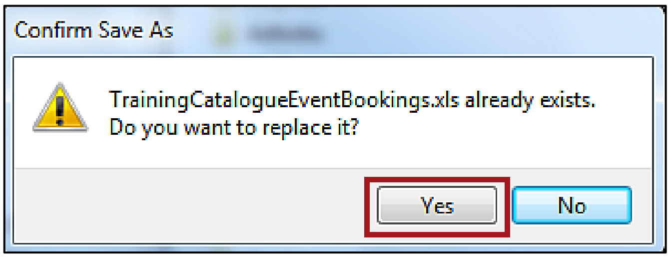
1. You can now print this register off for use in your classroom.

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.**

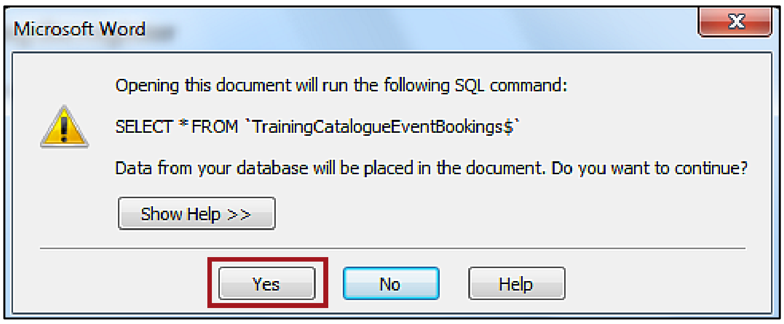
4. When you export future attendee information out of the Training Catalogue into an Excel spreadsheet, as long as you choose the same location, you will be prompted to replace the existing one. Simply continue to overwrite this Excel spreadsheet with new attendee information as and when you need to for producing new registers.



29.6 Re-opening the register

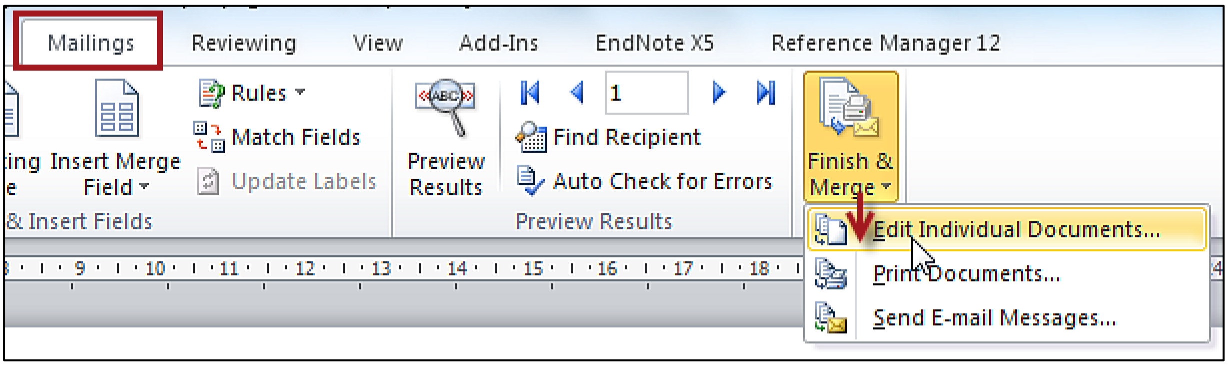
ⓘ *Remember to open the exported Excel spreadsheet first because you need to accept that the file you are trying to open is in a different format to the file extension, then minimise it to your taskbar.*

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?

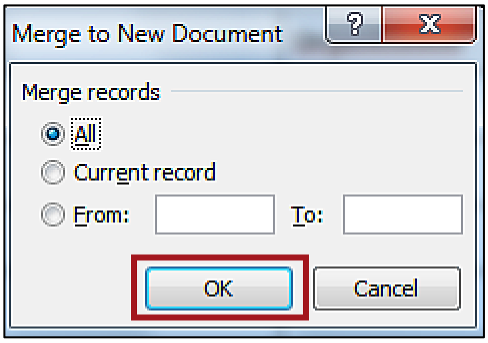


2. Click on **Yes** and the register will open. You do not need to 'Select Recipients' again as you have already done this once, and now the register is already looking to that data source (the exported Excel spreadsheet).

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.



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.*

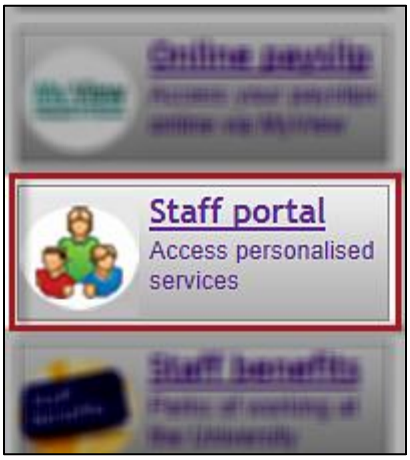
30 Index

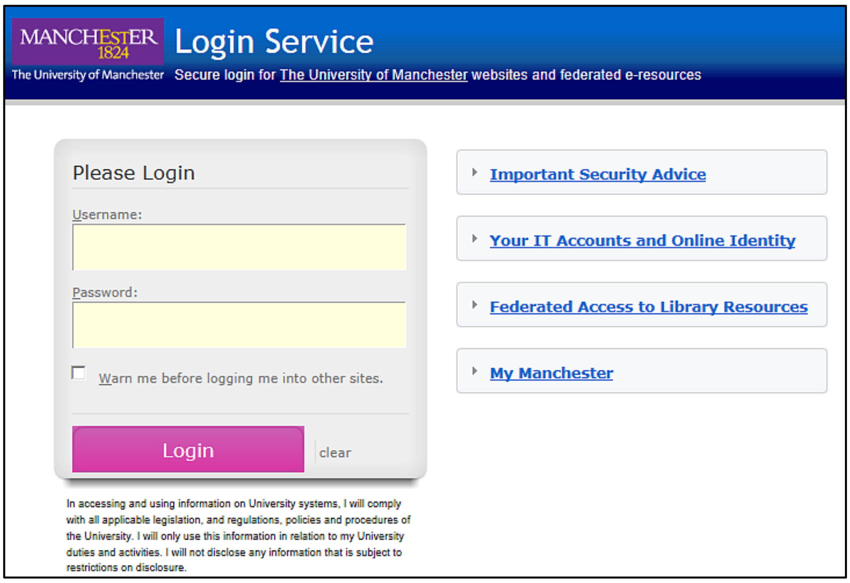
Supplementary information

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

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

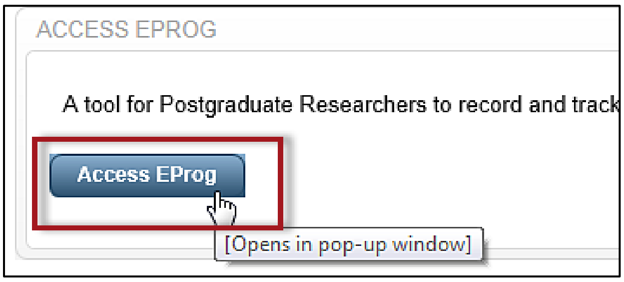
1. Scroll down the **Staff Net** page and from the left hand side locate the **Staff portal** link, click on it to log in, and log in with your standard university username and password.



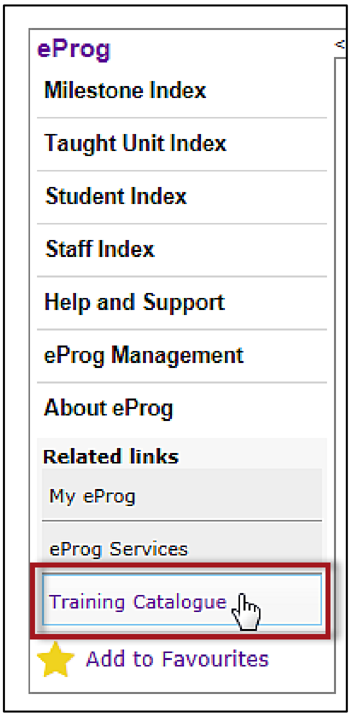


2. Once you have logged into **My Manchester** you will be faced with a number of tabs – it's not immediately obvious where the Training Catalogue link is. Take your cursor over the **Teaching and research** tab to open a drop down menu. From the menu click on the **Access eProg** option near the bottom.

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.