Introduction
This guide explains how to:

A. Set up a new training course
B. Schedule sessions for a course
C. Set up a new course instructor

Audience
Administrators in schools and departments responsible for setting up training courses, scheduling sessions and managing participants.

A. Steps to set up a new training course

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the main menu select Personnel then Course&gt;Course setup. The Course setup window opens.</td>
</tr>
<tr>
<td>2.</td>
<td>To create a new course, click New.</td>
</tr>
</tbody>
</table>
| 3.   | Complete the Course tab:  
  a. Tab out of the Course field (the course will be automatically assigned a course ID on saving).  
  b. Enter the Course name.  
  c. Hit spacebar and select the Course type from the drop down (you will only see those types applicable to you).  
  d. Enter the number of Days and Daily hours  
  e. Total hours will auto-calculate.  
  f. Enter the Course fee if applicable.  
  g. Check the Alternative schedule box if the course requires attendance at multiple sessions.  
  h. Enter the course Type. Select from External, Internal, Online.  
  i. Proposed room – if most of the sessions are going to be in the same room, you can enter the details here. Type the site code (e.g. GOW, GOR, MAL) then select the room from the drop down. Otherwise leave blank.  
  j. Proposed instructor - if most of the sessions are going to be led by the same person, you can enter the name here. Hit spacebar or type the name then select from the drop down. Otherwise leave blank.  
  k. Administrator – if known, type the name then select from the drop down. Otherwise leave blank. |
1. Enter the minimum, maximum and optimum number of delegates.
2. Enter the **Booking due date** (number of days in advance of the session). Deadline is particularly important if the instructor is external.
3. Check the **Automatic transfer from wait list** box if applicable. Leave blank if you want to manage the wait list manually.
4. **Status** – leave as **Active**
5. **Date from** – the date the course was first run.
6. **Date to** – generally leave as open-ended (31/12/2009).

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**4.** Complete the **Course information** tab:
- **Overview** - enter a brief description. Keep sentences short and enter each on a new line.
- **Learning Outcomes** - list the learning objectives/expected outcomes
- **Enter the Target audience.**
5. **Complete the Prerequisites tab, if relevant.**
   Click Add for each prerequisite then enter the details:
   a. **Prerequisite** - hit spacebar then select from the drop down.
   b. **Type** - hit spacebar then select from the drop down.
   c. **Type detail** – hit spacebar then select from the drop down.
   d. **Mandatory** – check the box to make the prerequisite mandatory.

6. **Complete the Equipment tab, if relevant.**
   Click Add then enter the details:
   a. **Equipment** - hit spacebar then select from the drop down. Note: if you need a new value added to this list, submit an ASK query to Business World.
   b. Enter the **Quantity**.
   c. Check the box to indicate who is responsible for providing the equipment.
   d. Enter a **Comment** if required.

7. **Complete the Competence tab, if relevant.**
   Note: By default the competence is fulfilled by completion of the course.
   Click Add then enter the details:
   a. Enter **Competence validity/expiry** information if required.
   b. **Competence type** – hit spacebar then select from the drop down (e.g. academic teaching qualifications, course codes).
   c. **Competence detail** – hit spacebar then select from the drop down.
   d. **Level** and **Grade** – if appropriate, hit spacebar and select from the drop down.
   e. Check the **Use expiry date** box if using Competence validity.
8. Complete the **Related courses** tab, if relevant.
   - Click **Add** then enter the details:
     a. Hit spacebar then select a course from the drop down.
     b. Enter a comment if required.

9. Click **Save**. A confirmation message is displayed and the course assigned a unique Course ID (e.g. 10042)

10. Click **OK**.

**What happens next?**
The course is now available for scheduling sessions.
B. Steps to set up a session schedule for a course

<table>
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<tbody>
<tr>
<td>1.</td>
<td>If you are following on immediately from Section A, click the <strong>Course scheduler</strong> button at the bottom of the <strong>Course setup</strong> window. The <strong>Course scheduler</strong> window opens.</td>
</tr>
<tr>
<td>2.</td>
<td>Alternatively, you can start from the main menu. Select <strong>Personnel</strong> then <strong>Course&gt;Course scheduler</strong>.</td>
</tr>
<tr>
<td>3.</td>
<td>To create a new scheduled event click <strong>New</strong>.</td>
</tr>
<tr>
<td>4.</td>
<td>Complete the <strong>Course event</strong> tab. In the <strong>Course</strong> field, hit spacebar or type the course name, then select the course from the drop down.</td>
</tr>
<tr>
<td>5.</td>
<td>Tab out. The form autopopulates. Note: the <strong>Course event ID</strong> will be assigned automatically on saving.</td>
</tr>
</tbody>
</table>
| 6.   | In the **Main information** section:  
| a.   | Enter the **Start** and **End** dates  
| b.   | Enter the **Start** and **End** times  
| c.   | Competence expiry date is autocalculated if this option has been selected in the course set-up. |

- **Main information**

<table>
<thead>
<tr>
<th>Start date*</th>
<th>20/12/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start time</td>
<td>10:00</td>
</tr>
<tr>
<td>Days</td>
<td></td>
</tr>
<tr>
<td>Total hours</td>
<td></td>
</tr>
<tr>
<td>Competence expiry date</td>
<td>20/12/2020</td>
</tr>
</tbody>
</table>

- **The Facilities** and **Participants** sections are autopopulated depending on how the course has been set-up, but most details can be manually entered/amended here.
Use the check boxes to allow deregistration after the due date, automatic transfer from wait list and overbooking.

8. In the **Additional information** section:
   a. For the **instructor** – do not use.
   b. For the **participants** – use to provide extra instructions for participants. Text entered here appears in the ‘Zoom’ screen on the course catalogue.

9. Click **Save**. A confirmation message is displayed and the session assigned a unique Course event ID (e.g. COURS-10073)

10. Click **OK**.

There is no relation between the **Course ID** (e.g. 10042) and the **Course event ID** (e.g. COURS-10071).

11. At step 5, if a course requires attendance at multiple sessions
   a. Check the **Alternative schedule** box
   b. In the **Scheduled dates** section, for each session click **Add**
   c. Enter the date start/end times.

What happens next?
The course and scheduled sessions are now visible to participants and open to enrolment on the course catalogue.
C. Steps to set up a new course instructor

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<tbody>
<tr>
<td>1.</td>
<td>From the main menu select <strong>Personnel</strong> then <strong>Course</strong>&gt;<strong>Fixed registers</strong>&gt;<strong>Course instructors</strong>. The <strong>Course instructors</strong> window opens.</td>
</tr>
</tbody>
</table>
| 2.   | In the **Personnel relational connections** section  
      1. Click **Add**  
      2. Enter the instructor details:  
         a. Type the **Person's** name then select from the drop down  
         b. Course instructors – enter “course instructors”  
         c. Enter the **Date from** and **Date to**. To make the date open ended enter 31/12/2099  
         d. Leave **Status** as **Active**. |
| 3.   | Click **Save**. A confirmation message is displayed. |
| 4.   | Click **OK**. |

**What happens next?**
The person will appear in the list of instructors during course set up and scheduling.

**Where to go for help**
If you need help please contact either the HR Learning & Organisational Development team on ext. 3152, or submit a query through ASK on My Birkbeck for Staff.