OLM GUIDANCE NOTES

Oracle Learning Management (OLM) Training Manual - Department Users

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Introduction:

What does OLM stand for?

- Oracle Learning Management, a sub section of the ICIS system.

What does it do?

- Stores training information for course providers in the College
- Enables quick and easy enrolments onto courses
- Automatic notifications provides a quicker correspondence with delegates
- Works with Discoverer to produce reports (e.g. End of Year Report)

What are the advantages of OLM?

- Consistent with HR System and iProcurement so users might have background knowledge
- Enables quick access to HR data

Who will use it?

- Staff Development Unit
- Centre of Education
- Health and Safety
- Finance

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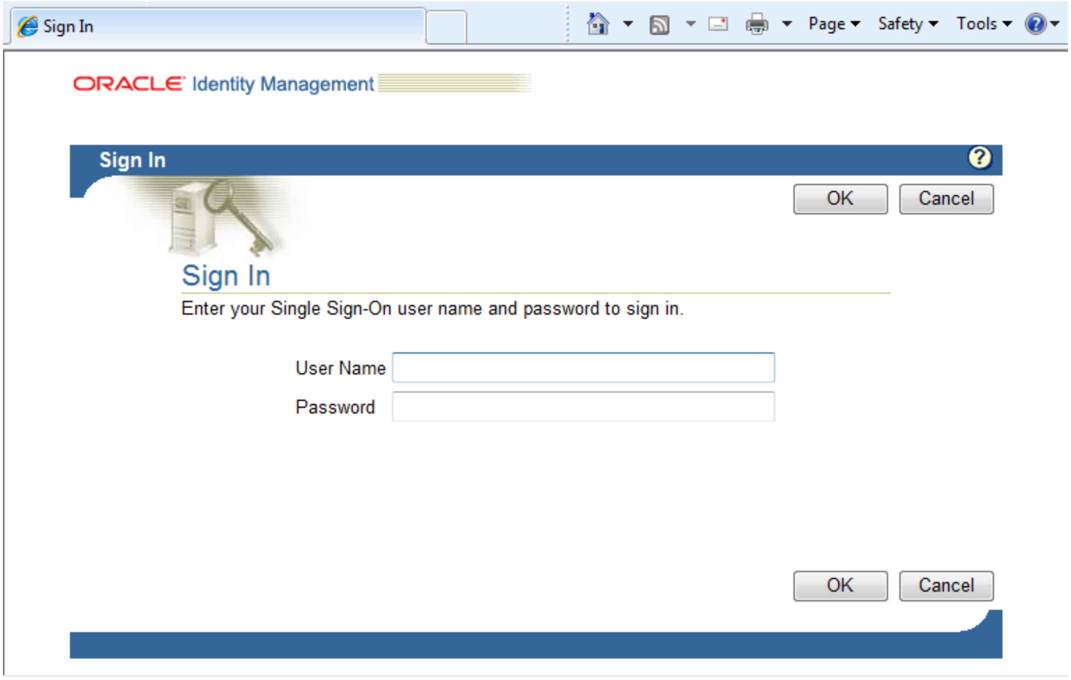
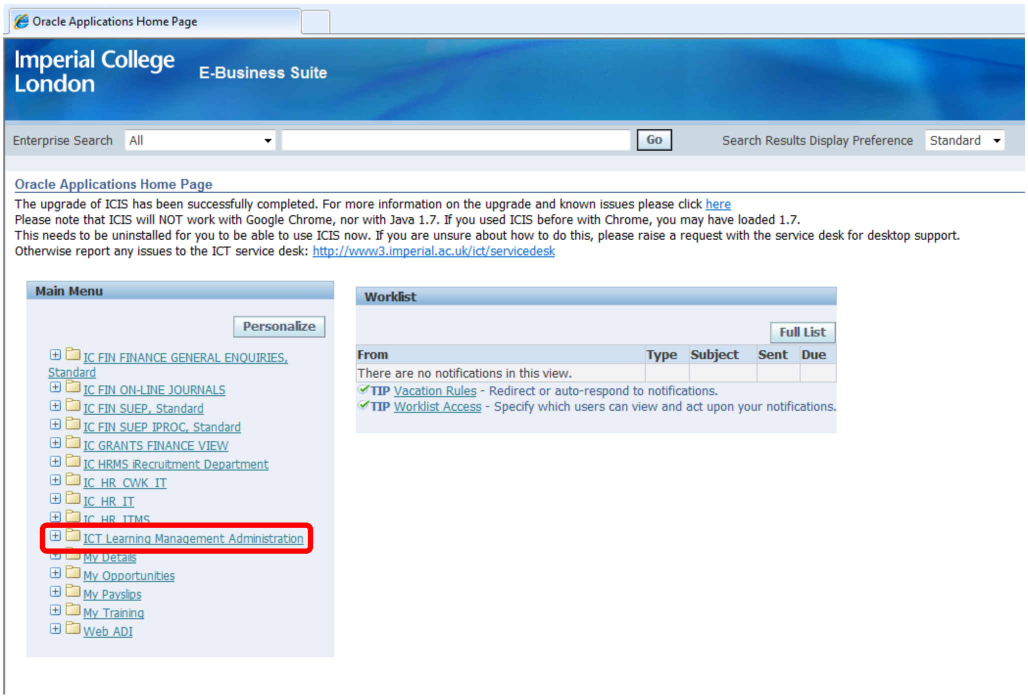
Logging into OLM:

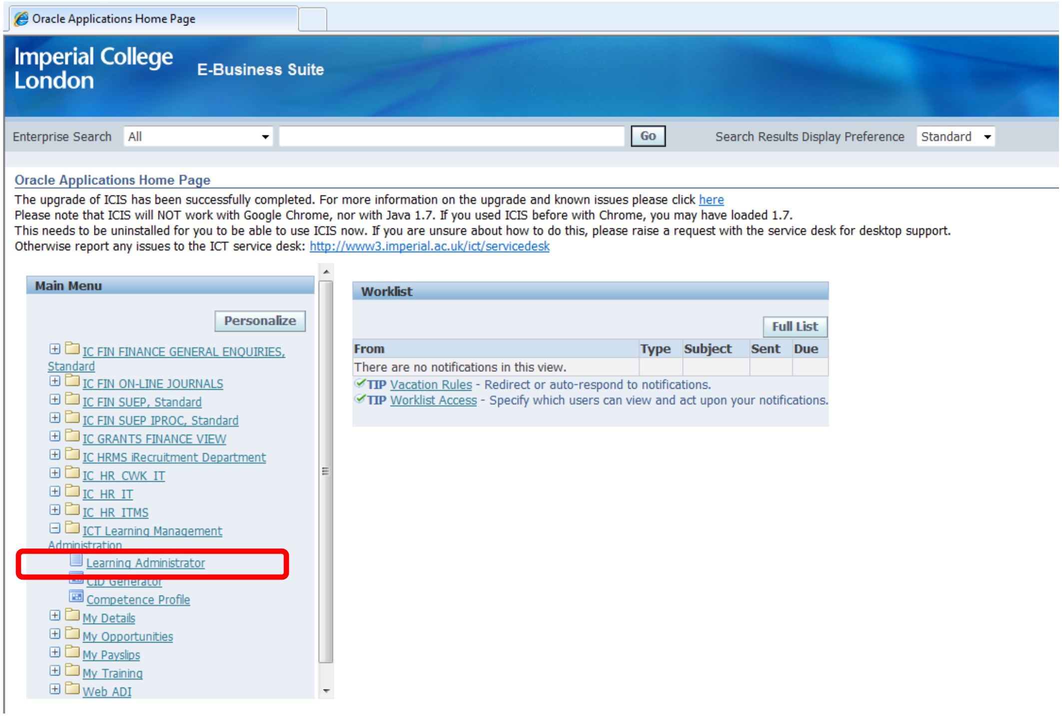
1. Log in to ICIS by entering your college user name and password.



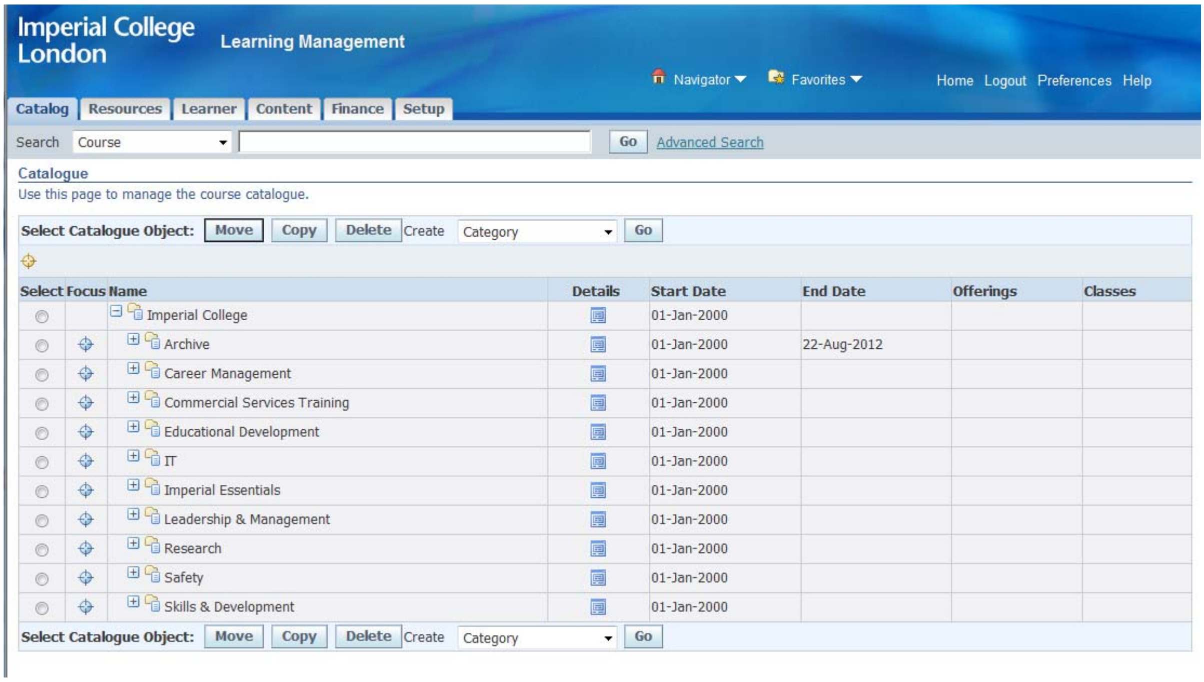
2. Select your departmental OLM responsibility e.g. ICT Learning Management Administration.



3. Now select **Learning Administration** on the right hand side of the screen.

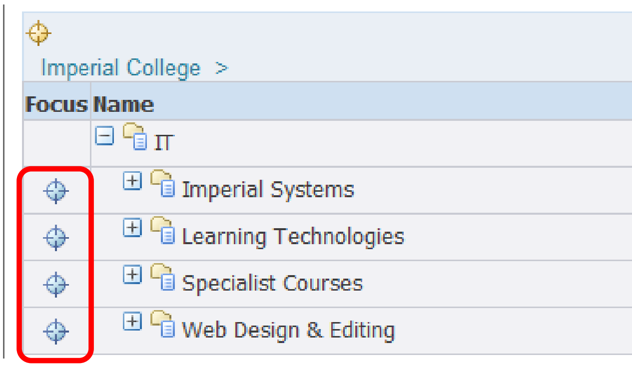


4. The OLM catalogue will display.



Using the Focus icon:

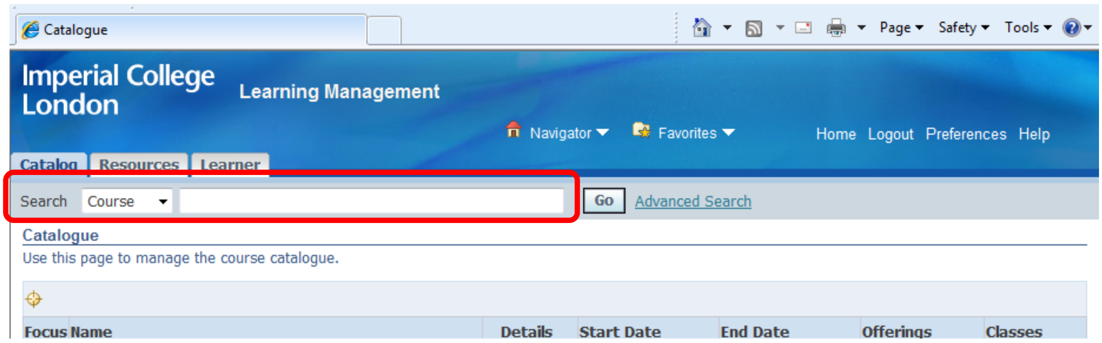
Use the Focus icon on the left side of the Catalog options to navigate.



The focus button focuses on the specific category of courses that you wish to work on, taking out of view the rest of the catalogue i.e. hides the other Categories, Sub-Categories, Courses, Offerings or Classes which aren't related to your focus.

Using the Search Tool at the top of the Catalogue screen:

If you are not very familiar with the catalogue and where a particular course sits, you can use the search tool at the top of the Catalogue screen to help you find it.



1. Type in the first few letters of the course you wish to find and click on '**Go**'.

2. You will then be provided with a number of courses that include the word you searched with. Select the relevant course; using the '**View in Hierarchy**', this is in the last column to the right of the screen.

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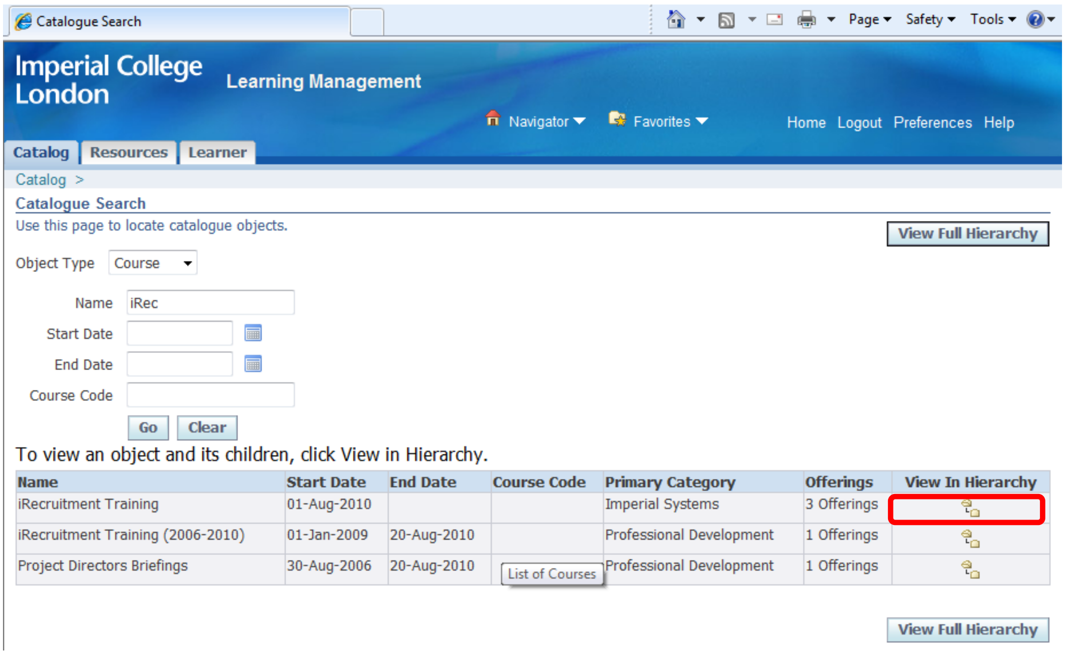
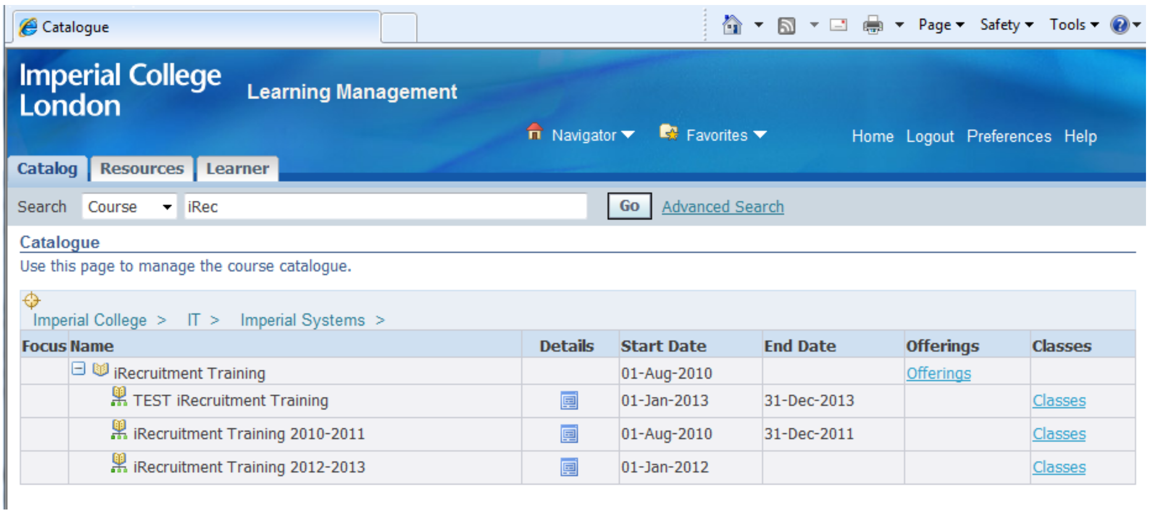


3. This will provide the offering and list of classes within that course. This is a quick way of finding your class.



Creating Courses:

This section shows you how to create a Course, update a Course and how to add attachments to a Course.

About Courses:

Courses are created within Categories and Sub-Categories.

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A Course is a generic class which provides a template in which specific classes can be based on. You can input general information which all classes will inherit e.g. course name, course code (if applicable), intended audience, keywords, sponsor, course administrator and the period which notifications are sent out.

Important note about notifications:

A notification is an e-mail message sent to delegates. There are two types of notification: 1) Confirmation of Booking and 2) Joining Instructions.

A Booking Confirmation notification is sent the day after a delegate is enrolled. Documents such as a Pre-Course Questionnaire can be attached to a Course where they will be sent out with the Confirmation of Booking notification.

A Joining Instructions notification is sent before the class start date at the period specified at Course level. This is usually 7 to 14 days prior to the class date. Documents such as a Programme can be attached to a Class and will be sent out with the Joining Instructions notification.

Documents that are used as attachments i.e. a course programme can be saved on a shared drive so that other colleagues can administrate your course, if necessary.

Navigate to the Sub-Category:

1. Log in to ICIS and use your departmental OLM responsibility.

2. Double click on the **Learning Administration** menu option. The Catalog window will open up.

3. Navigate to the Sub-Category to which you want to add a Course to.

Create a Course:

1. Click the radio button ( ) next to the Sub-Category you wish to add a course to.

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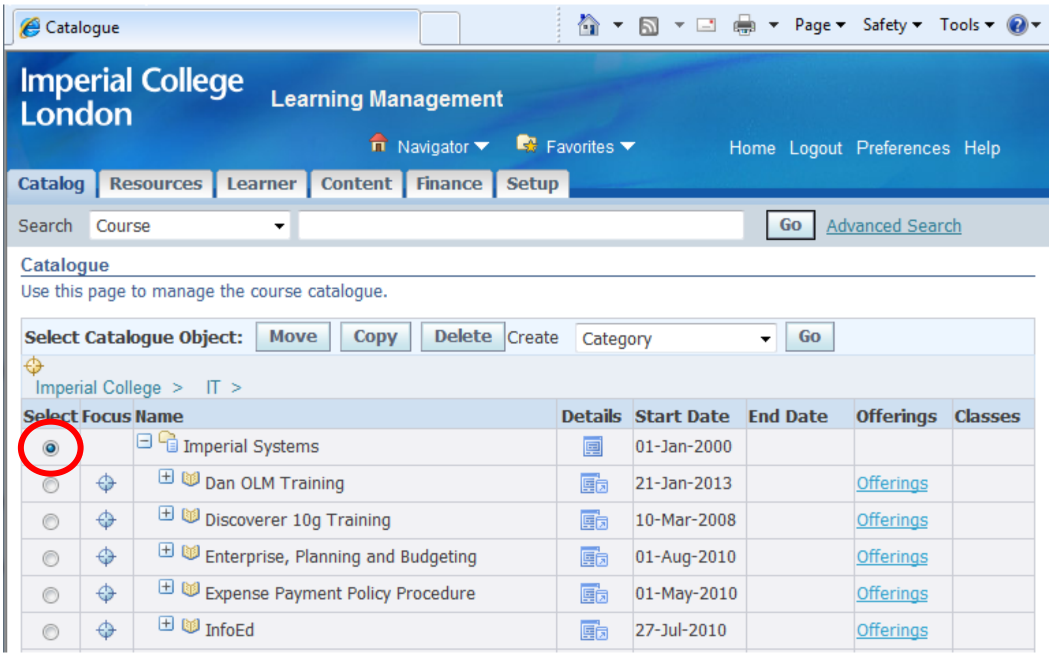
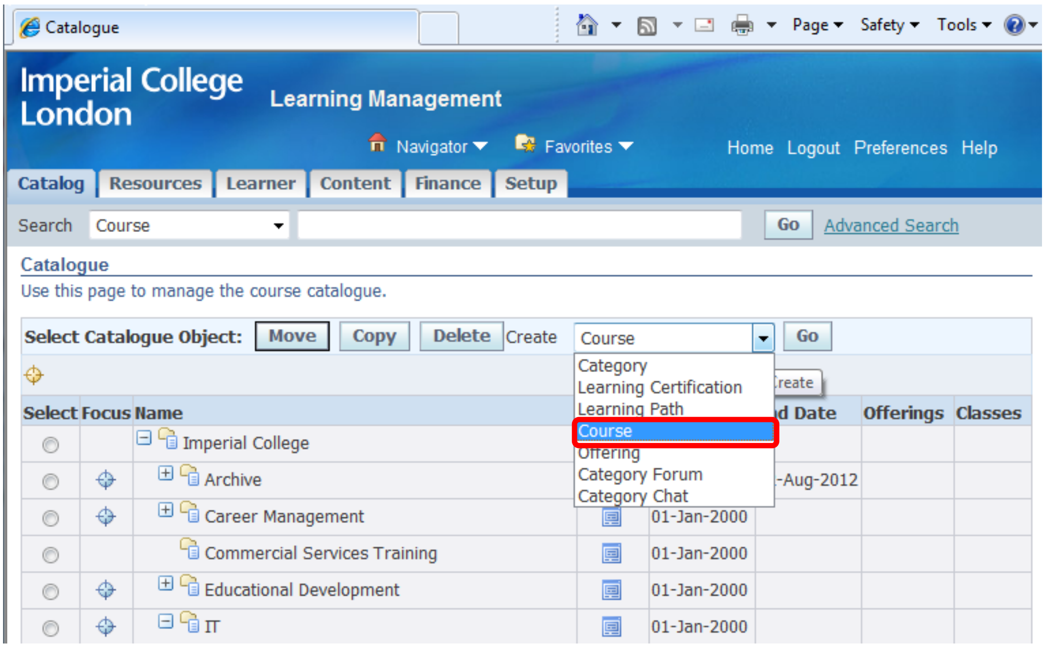
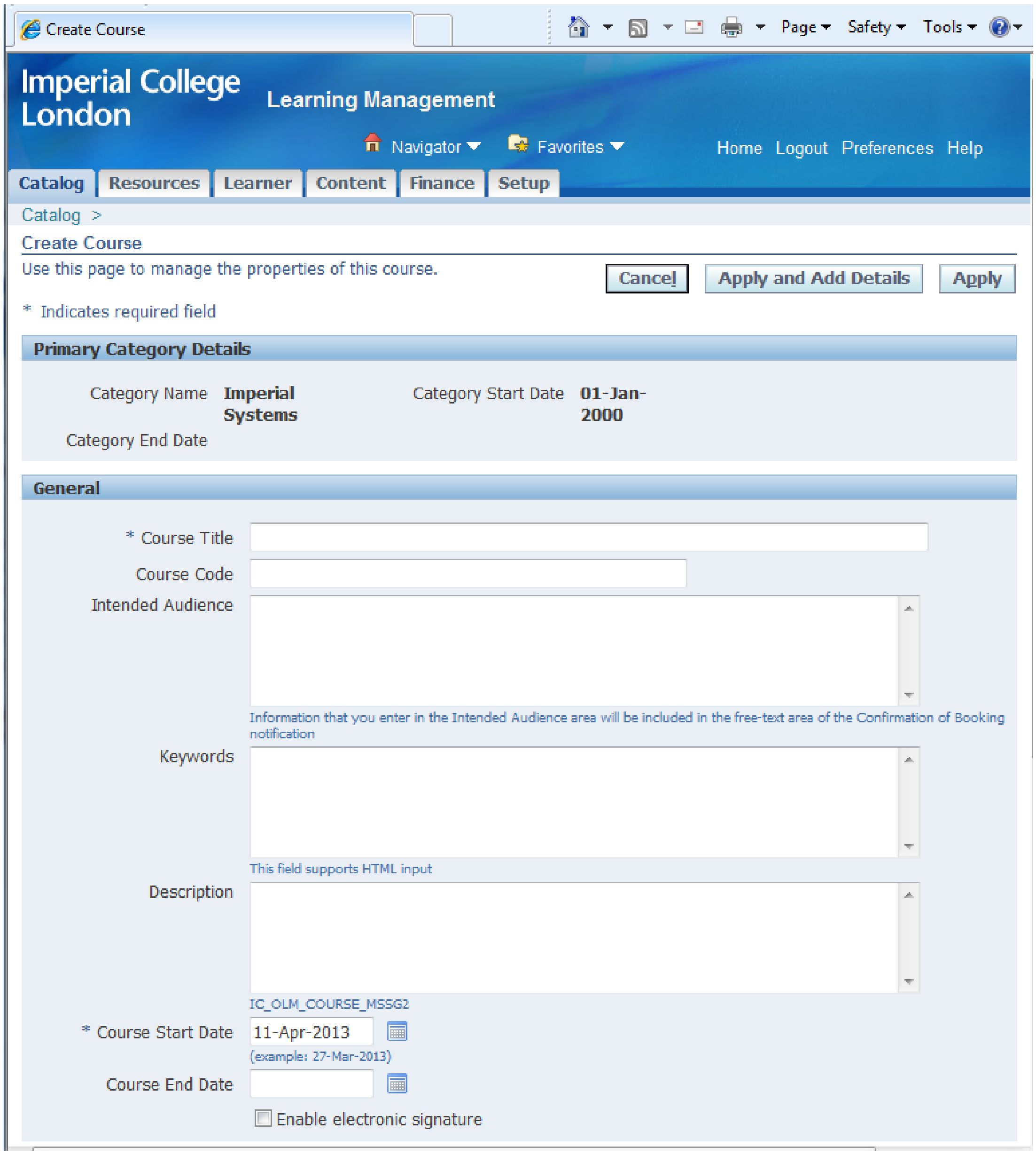


2. In the **Select Catalog Object** row above the main table, select **Course** from the Category drop-down list. Click the **Go** button.



The Create Course page is displayed:



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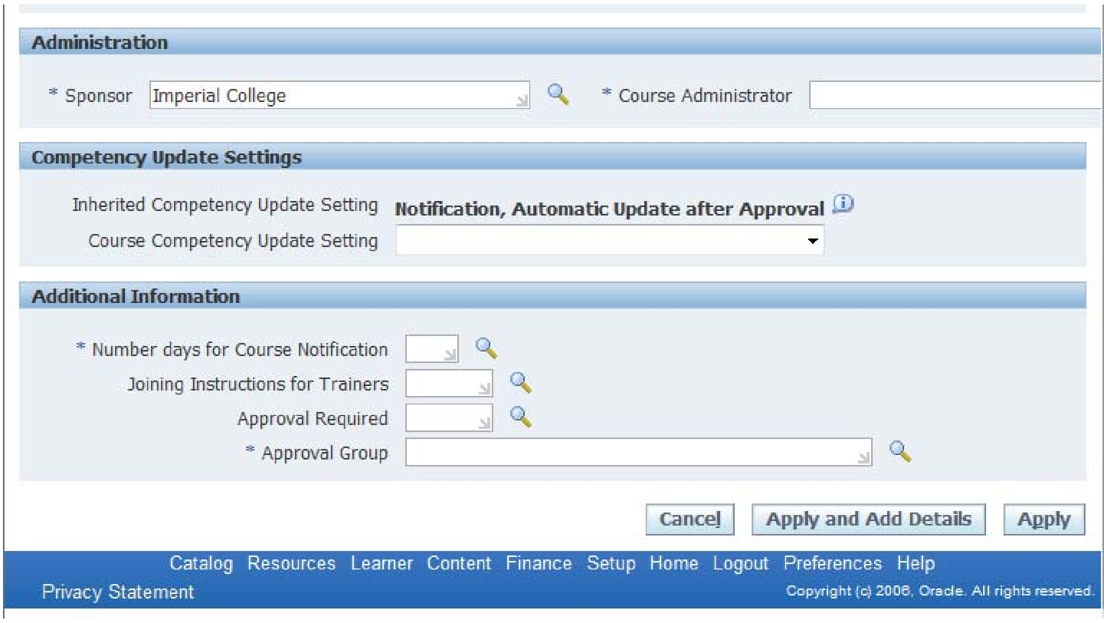

3. In the **Course Title** field type the name of the course.

Note: Avoid using large hyphens in the course title because when we report on this, Discoverer will not recognise the symbol. If a hyphen is required in the title, ensure it is the smaller one (e.g. use "Course Title - Level 1", not "Course Title – Level 1").

4. In the **Course Code** field, type course code if it's applicable.

5. If extra text is required in the Confirmation of Booking email, enter it into the **Intended Audience** field (e.g. "It is recommended that you attend the Course Discoverer Level 1 before attending Discoverer Level 2" or "Please complete the attached pre-course questionnaire...")

Note: Information entered in the **Intended Audience** field will be included in the Confirmation of Booking notification. Only enter text into this field if you intend it to be included in the Confirmation of Booking email sent to all delegates.

6. Today's date is automatically entered into the **Start Date** field and you can leave this as it is.

Note: If you are retrospectively creating a course then you need to enter the first date of the class you are adding into that course, otherwise, you will not be able to create a retrospective class.

7. The **End Date** field should be blank.

8. Imperial College is automatically entered into the **Sponsor** field and you can leave this as it is.

9. Type the surname of the person responsible for the administration of the Course in the **Course Administrator** field and then click on the magnifying glass.

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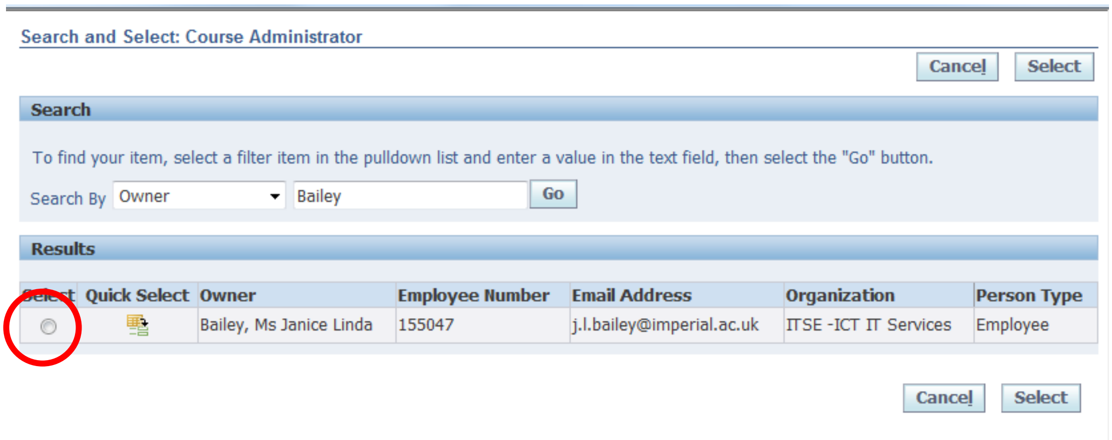
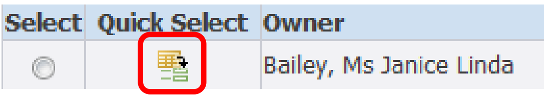
Note: When an employee leaves and another takes over their course administrator responsibility, the **Course Administrator** field must be updated to reflect this, otherwise the notifications for the course will not fire off.

A Search Select List window will pop up.

10. In the **Search and Select List** window, select the correct person from the list by clicking into the radio button ( ) next to their name, then click the **Select** button at the top-right or bottom-left-hand side of the window.



Tip: It is possible to speed up the selection from the list by clicking on the Quick Select icon ( ) next to the correct person in the list:



The Search and Select closes and you are returned to the Create Course window.

Alternatively, you can pick from the list of names that are automatically displayed when you start to enter the surname.

11. The default period for when Joining Instructions notifications are sent is 14 days. If you want to amend this, type one of the following values into the **Number of days for Course Notification** field:

00 – No Joining Instructions notification will be sent.

07 – Joining Instructions will be sent 7 days before the start date of the course.

14 – Joining Instructions will be sent 14 days before the start date of the course.

21 – Joining Instructions will be sent 21 days before the start date of the course.

28 – Joining Instructions will be sent 28 days before the start date of the course.

Tip: To see all values listed under the **Number days for Course Notification** field, type in a wildcard (**%**) on its own and click **Find** (torch icon next to the field). This will return the full list of values above.

Note: If someone has been enrolled after the 14 day fire off, the joining instructions will not fire off 13, 12, 11, 10 etc days before the course start date but 7 days prior to course start date. If a delegate is enrolled after the 7 days fire off, the course notification will go out 6, 5, 4, 3, 2 or 1 day prior to course start date.

12. Add '**Yes**' into the **Joining Instructions for Trainers** field, if you would like the trainers set up against the classes in your course to receive a copy of the joining instructions notification sent to each delegate enrolled onto your class.

13. In the **Approval Required** field, add '**Yes**' if you would like to approve who can attend your classes e.g. where your class is open only to those that have attended Level 1 etc.

14. If you have selected Yes in the Approval Required field, select the appropriate approval group in the **Approval Group** field e.g. ICT Training Approval Group. A notification will then be sent to the email address attached to your approval group when someone tries to enrol onto your class, which will then allow you to approve or reject their enrolment.

Note: If you need a new Approval Group created, please contact Daniel Brooke, HR Systems Trainer via email: d.brooke@imperial.ac.uk.

15. Click the **Apply** button at the top-right or bottom-right-hand corner of the window.

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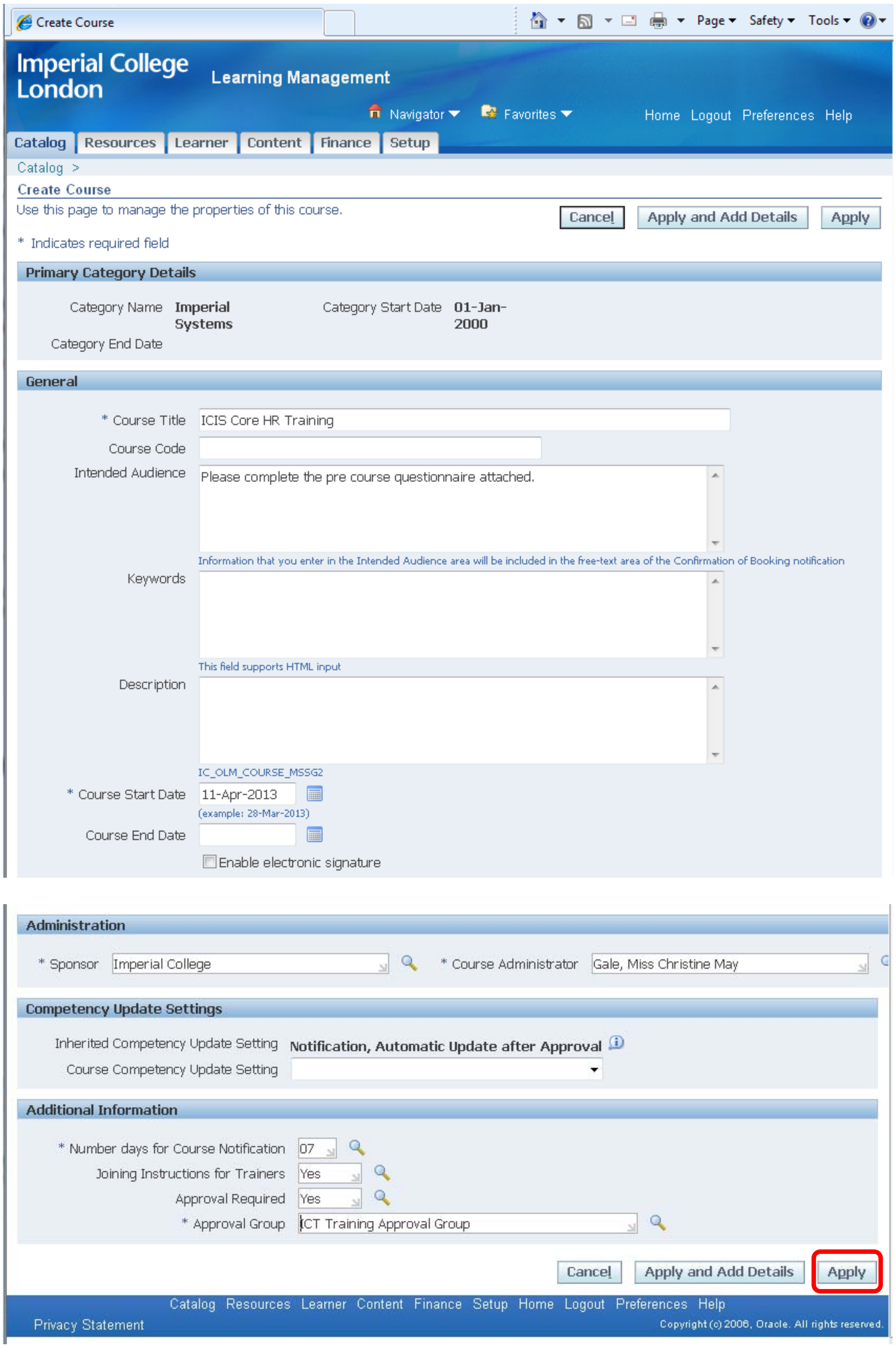

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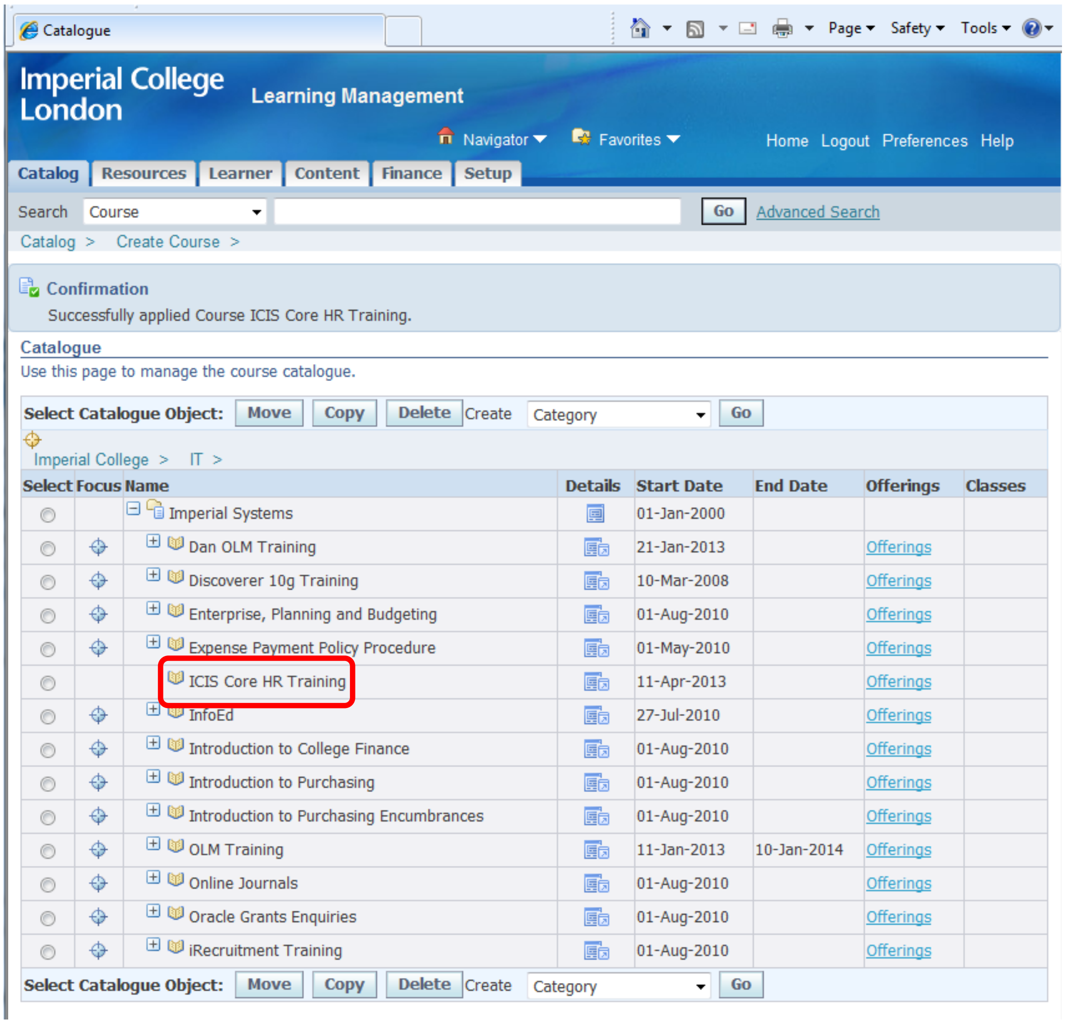
17. The Catalog page is displayed with the new Course you have just created under the Sub-Category you specified.



Update a course:

Navigate to the Course page of the course you want to update by clicking on the blue square to the right of the course name.

1. Click on the **Update** button at the top-right or top-left-hand corner of the page.

The Update Course page is displayed.

2. Modify any of the fields on this page that you wish to and then click the **Apply** button at the top-right or top-left-hand corner of the page.

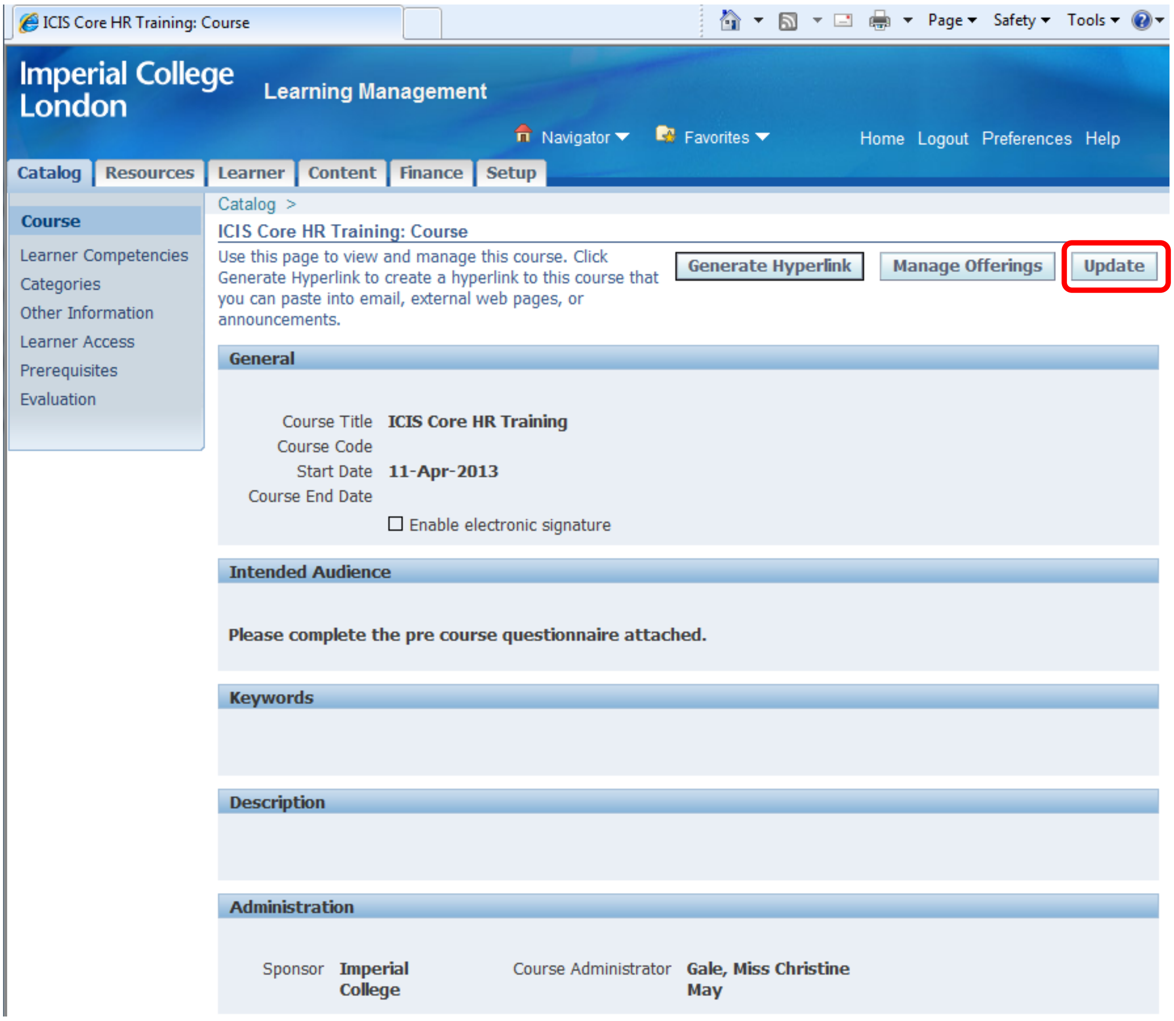
The Course page is displayed, and a confirmation message appears at the top of the page confirming that you have successfully updated the Course.

Add an Attachment to a Course:

1. Navigate to the course you want to add an attachment to by clicking on the blue square to the right of the course name.

The Course details page is displayed.

2. Click on the **Update** button at the top-right or bottom-left-hand corner of the window.



4. The Update Course form will open up:

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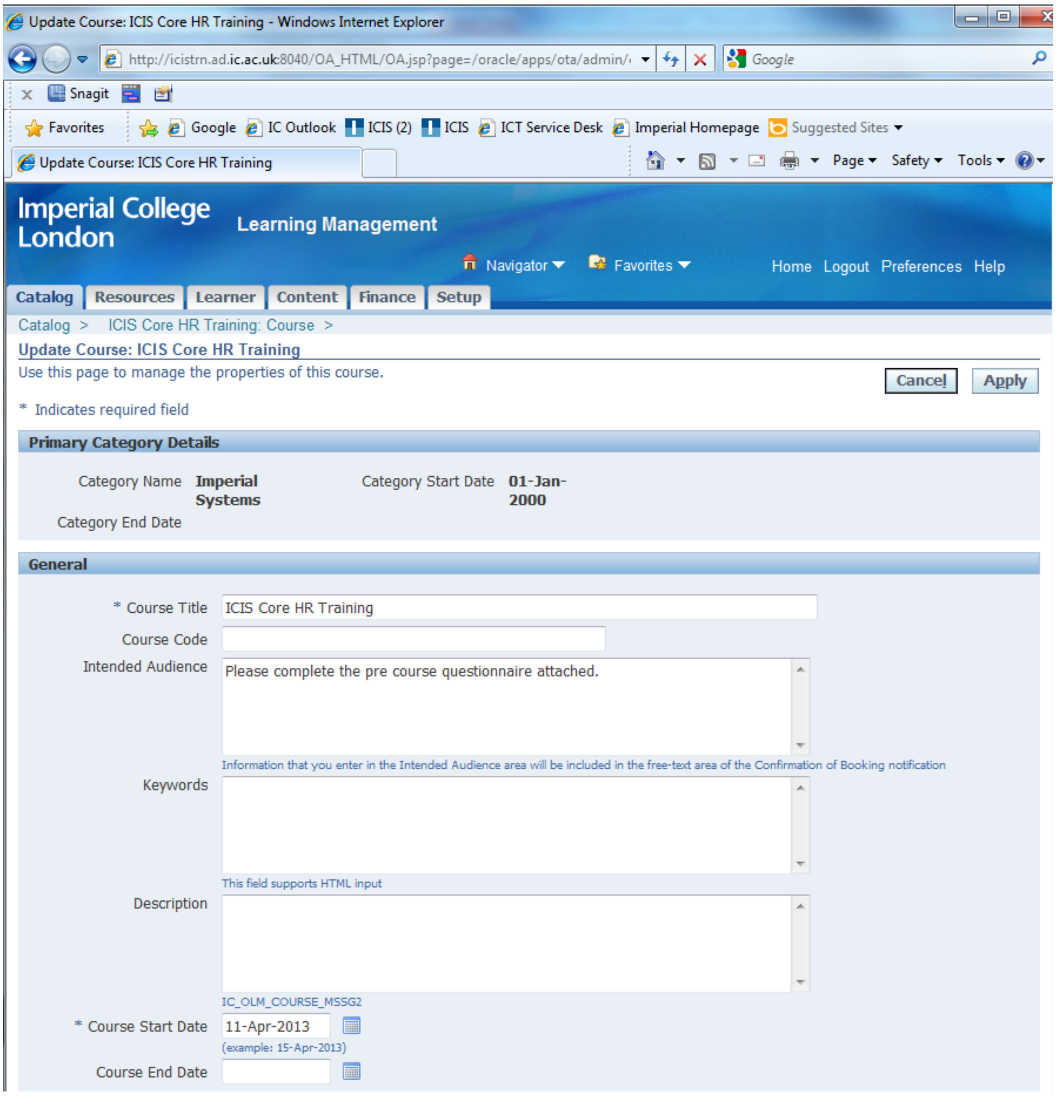


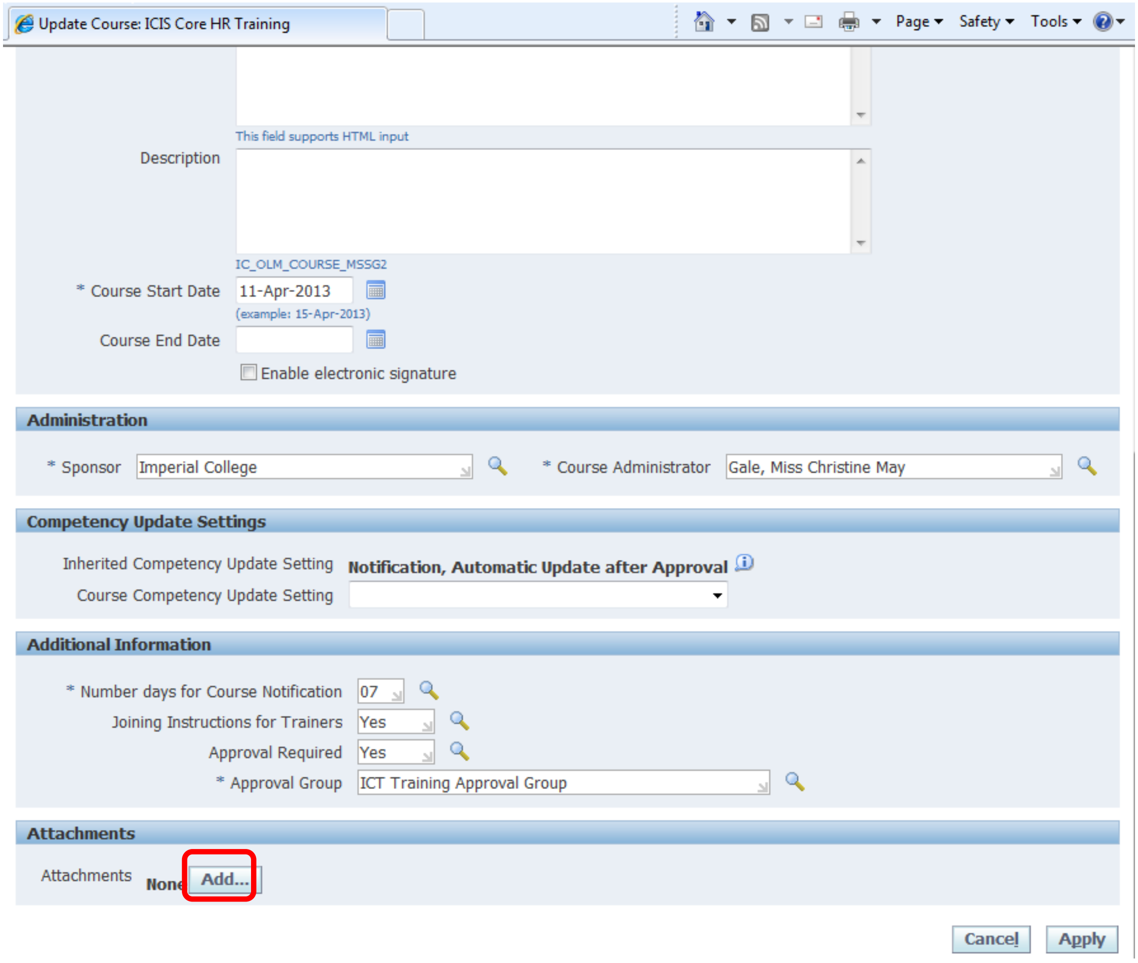
5. Text in the **Intended Audience** field will appear in the Confirmation of Booking notification. It is recommended that you add a line advising delegates about returning any attachments.

For example, if a pre-course questionnaire is going to be attached, you will want to ask delegates to complete and return it as soon as possible so that this information can be passed on to the trainer.

Do not put specific dates in the intended audience field because this information is carried through to the booking confirmations for a number of different classes on a number of different dates under a particular course title.

A follow-up reminder for the completion and return of your questionnaire can be added at Class level, and will be fired off with the joining instructions.

6. Click the **Add** button at the bottom-left-hand corner of the window.



The Add Attachment page will be displayed.

7. Type the name of the attachment into the **Title** field e.g. Pre-Course Questionnaire.

8. To add a further description on what the attachment is, click into the **Description** field and enter as free text.

8. From the **Category** drop-down list, select **Learner Attachment**.

9. Click the File radio button ( ) next to the Type label.

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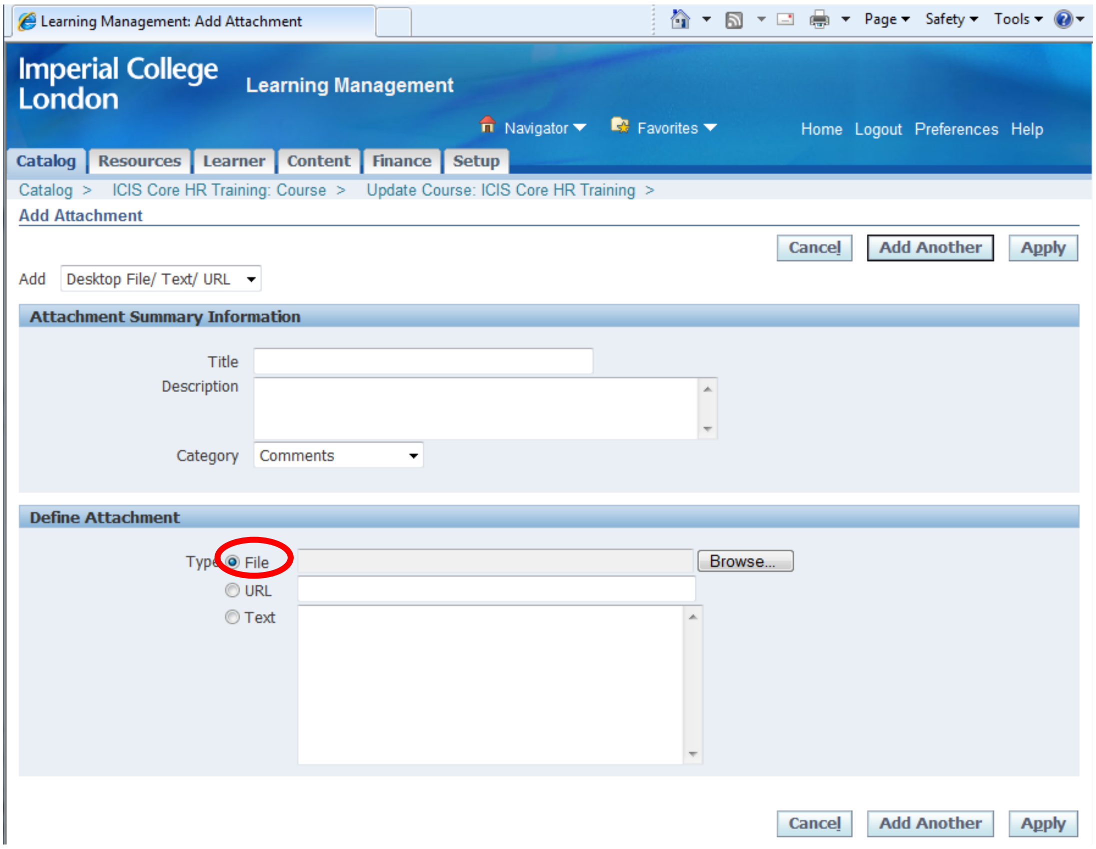
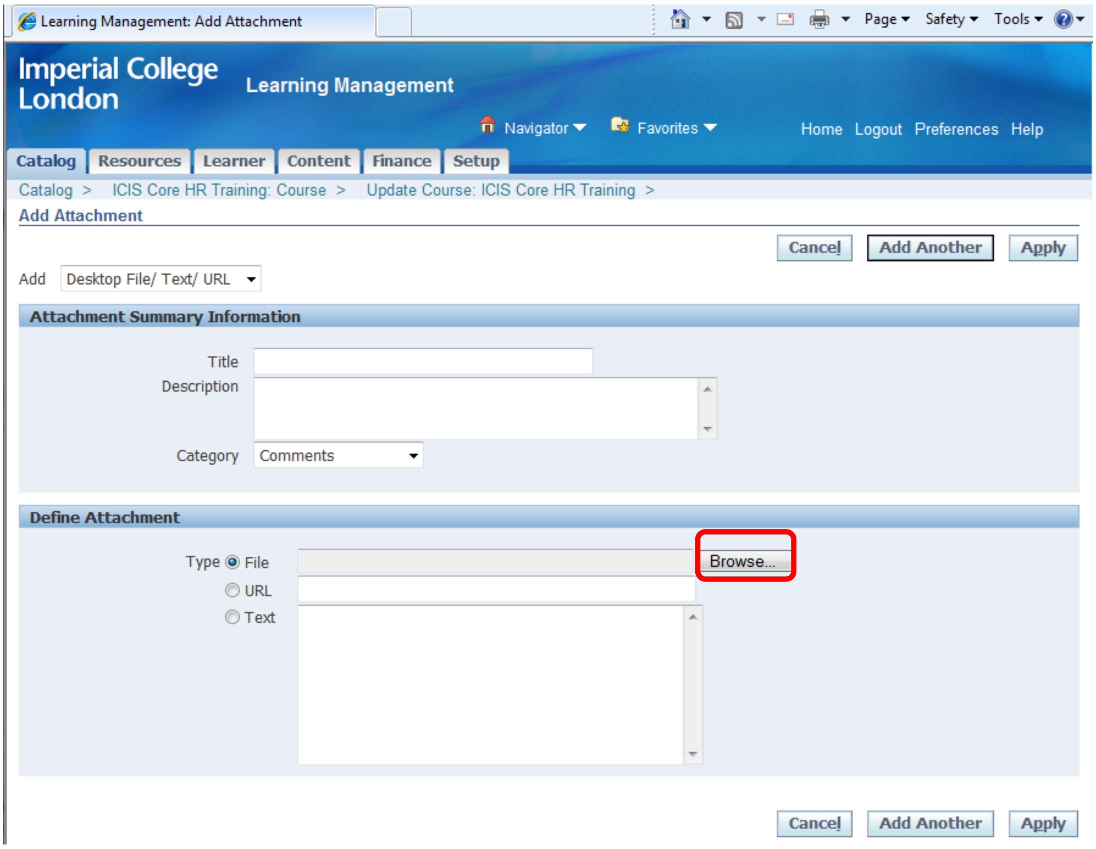
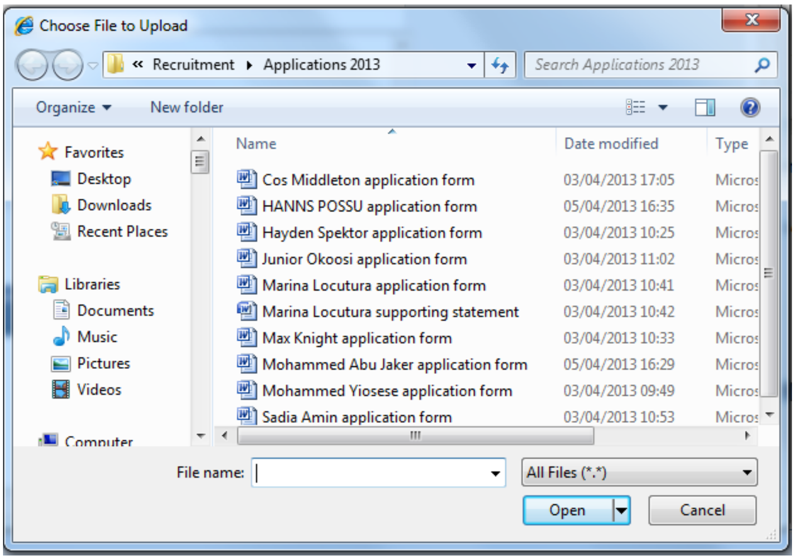


Note: Please attach Files only, URLs and Text attachments cannot be used with notifications. The types of Files that can be attached are Word docs without the symbol “&” written in the file name, PDF, PowerPoint and Excel docs. The maximum number of attachments is 5.

10. Click the **Browse** button next to File field:

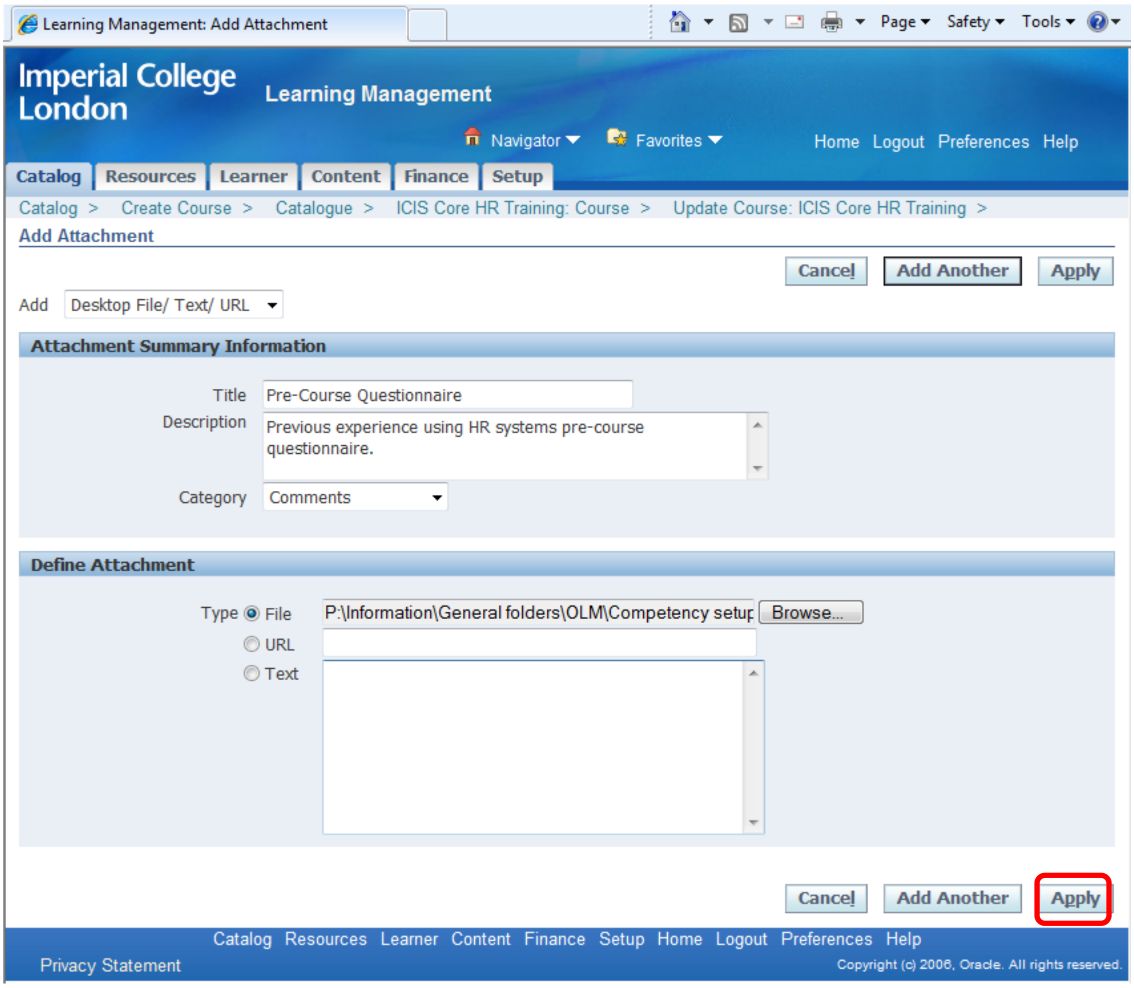


The Choose File window will appear on the screen.

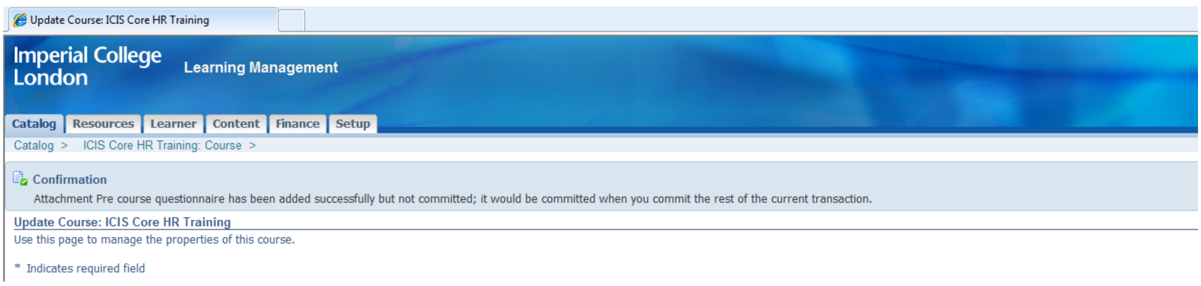


11. Find the document you want to attach and double-click on it to attach it to the Course. The location of the document will automatically be displayed in the File field.

12. Click the **Apply** button at the top-right or bottom-left-hand corner of the window.

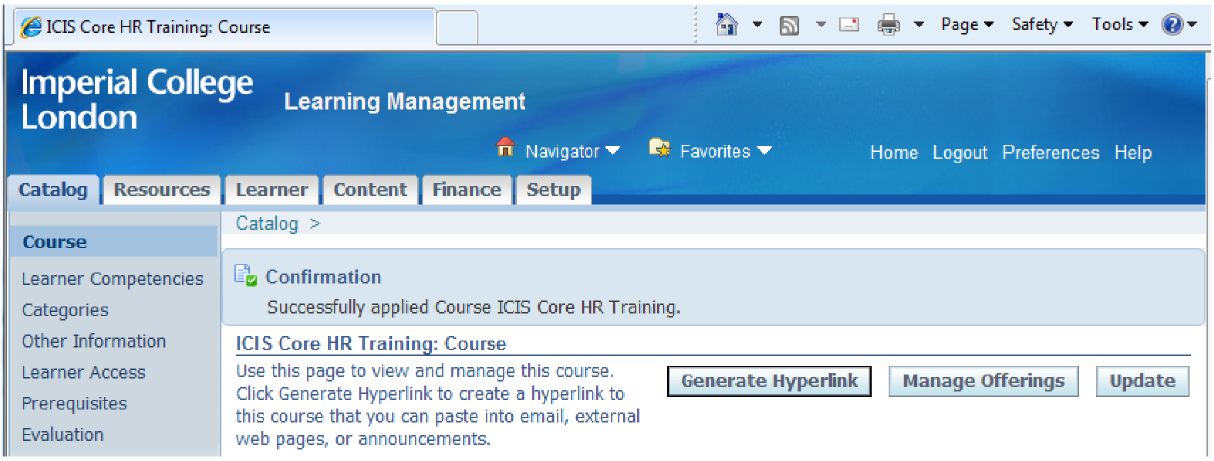


The Update Course page is displayed and a confirmation message will be displayed to confirm that the document has been successfully attached:

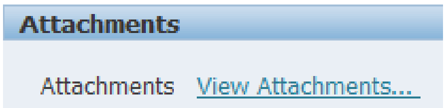


16. Click the **Apply** button at the top-right or bottom-left-hand corner of the screen.

17. The Course page is displayed, and a second confirmation message will be displayed to confirm that the Course has been saved.



Note: If you would like to confirm that you have successfully attached a document. Click on the View Attachments link at the bottom-left-hand corner of the page.



Note: Your attachment must not have a '&' in the title of the document (i.e. in the name of the file) as the joining instructions will not fire off if it's included, so if you have a pre course questionnaire with two dates e.g. Time Power Pre - Mon 18 Aug and Tues 26 Aug 2008 make sure you put 'and' rather than '&'.

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Offering:

This document shows you how to create an Offering and update an Offering.

About Offerings:

Offerings are created within Courses.

An Offering specifies the method in which a Course will be delivered. OLM allows you to deliver courses in several ways e.g. classroom-based, web-based, dissertation etc.

An Offering must be created first before you can create a Class.

Navigate to the Course:

1. Log in to ICIS OLM and use your departmental OLM responsibility.

2. Double click on the **Learning Administration** menu option.

The Catalog window will open up.

3. Navigate to the Course to which you want to add an Offering to.

Create an Offering:

1. In the Course page click on the **Manage Offerings** button at the top-right or bottom-right-hand corner of the page.

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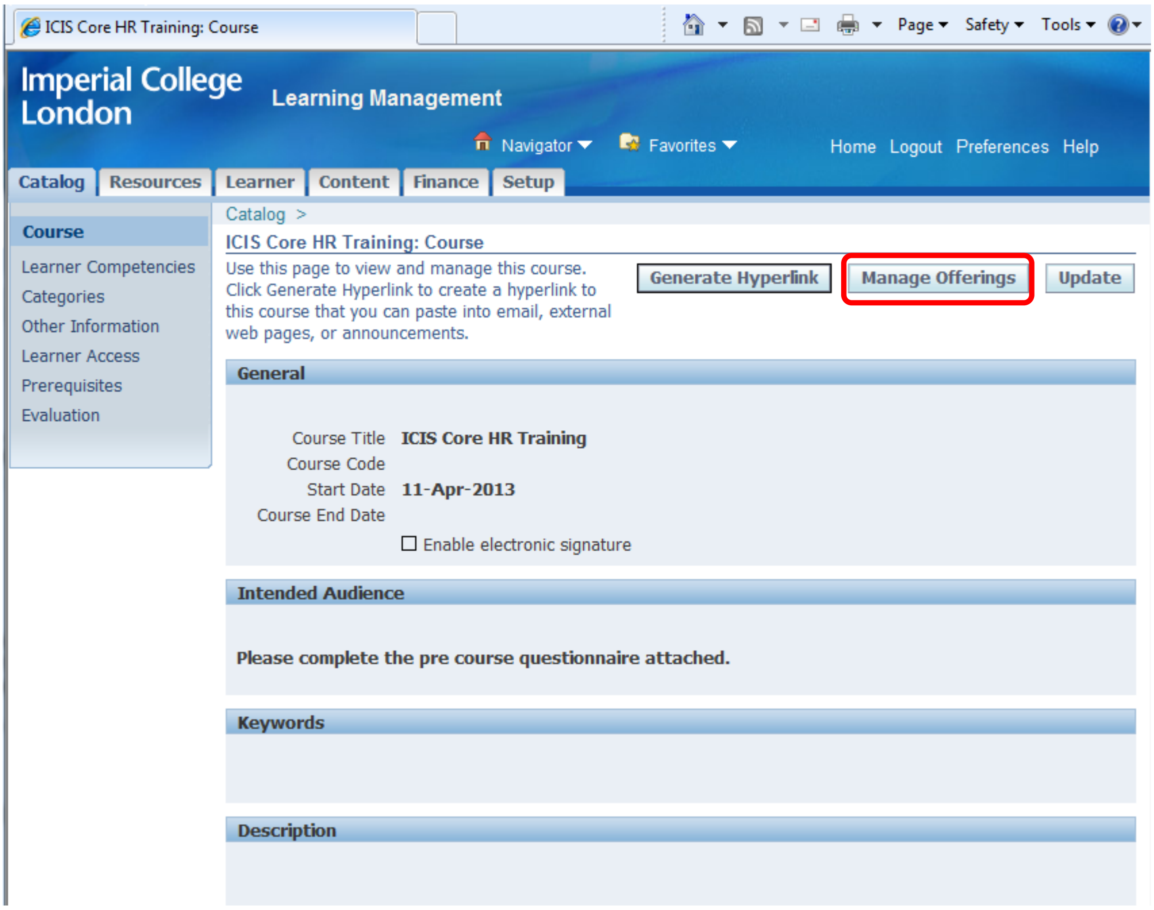
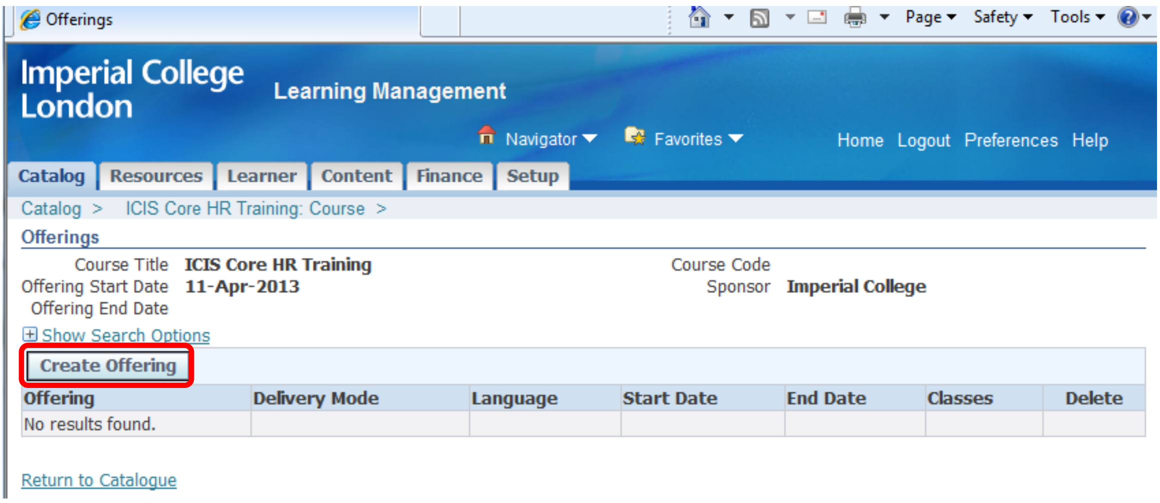
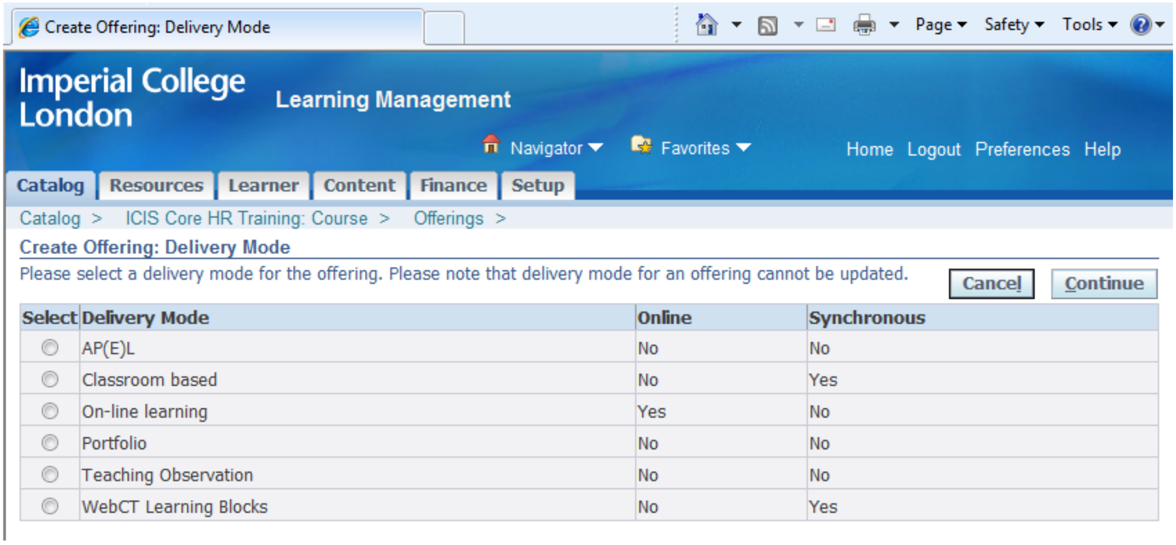


The Offerings page is displayed.

2. Click on the **Create Offering** button on the left-hand-side of the page.

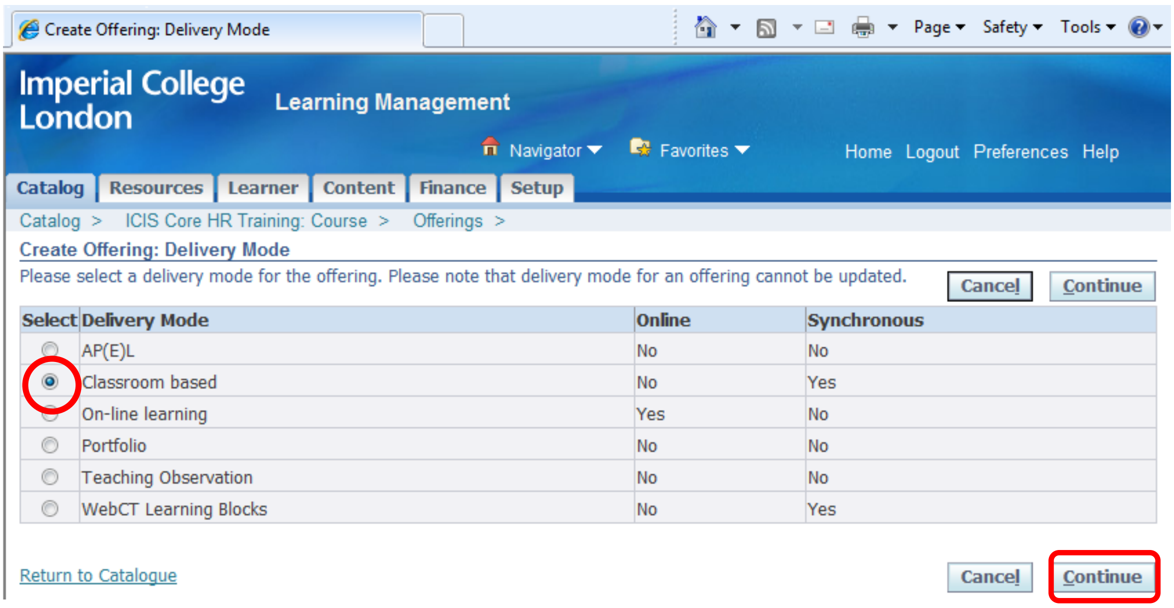


The Delivery Mode page is displayed.



4. Select the mode of delivery by clicking on the respective radio button ( ).

5. Click the **Continue** button at the top-right or bottom-right hand corner of the page:



The Create Offering page is displayed:

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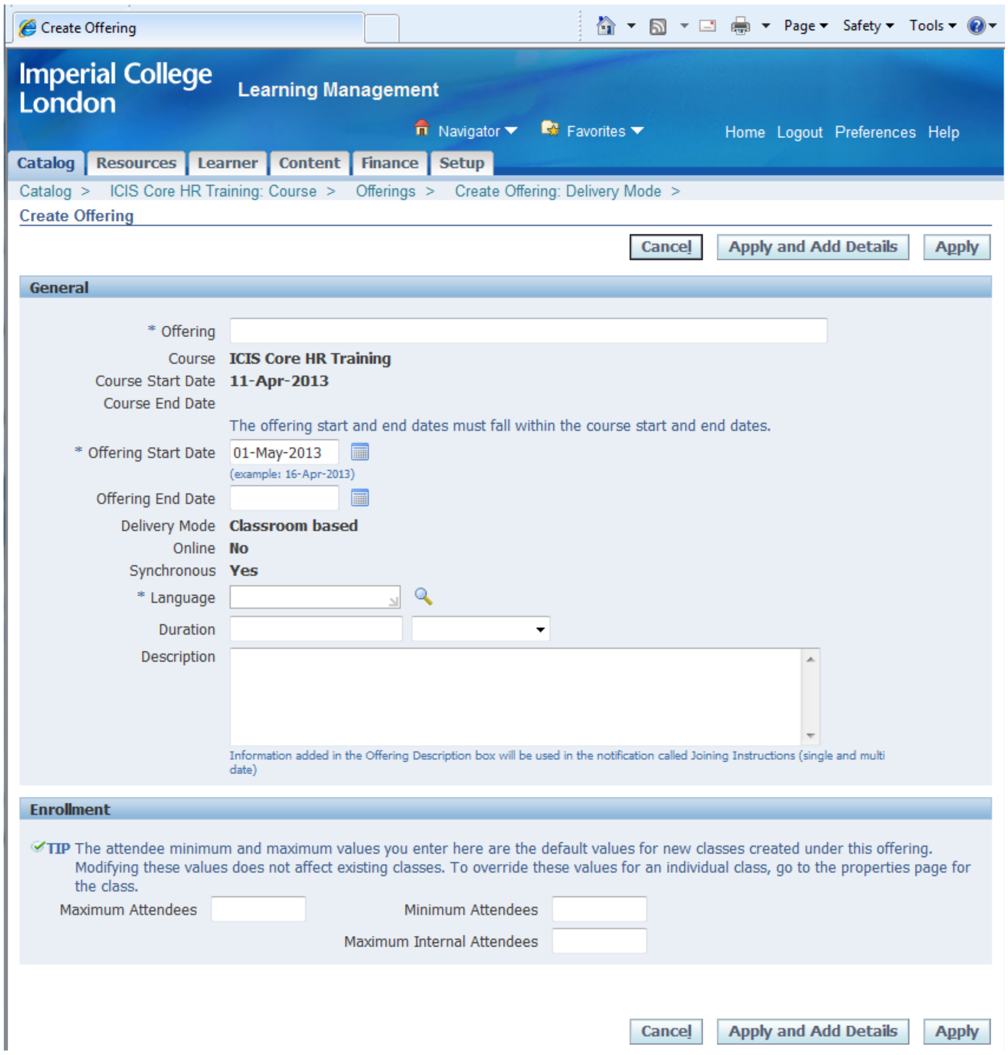


7. Either type the name of the offering into the **Offering Title** field or copy and paste the name of the title from the Course Title field below.

Note: Avoid using large hyphens in the offering title because when we report on this, Discoverer will not recognise the symbol. If a hyphen is required in the title, ensure it is the smaller one (e.g. use “Offering Title - Level 1”, not “Offering Title – Level 1”).

8. The **Offering Start Date** field automatically defaults to today’s date. You can change this date to a date in the past or future depending on whether you are setting up classes retrospectively or in the future.

Note: If you are retrospectively adding a class within an offering, you should enter the first date of the class in the **Offering Start Date** field. Otherwise, you will not be able to create a Class that occurred in the past.

9. You can leave the **Offering End Date** field blank if your classes are on-going with no fixed end date, however, if you have entered a course end date your Offering End Date must fall within this date.

10. In the **Language** field select **English** from the picklist.

11. Type the number of days your classes will run for in the **Duration** field. This value should be in whole or half day increments e.g. 1 for one day and 0.5 for half a day.

Note: For reporting purposes, it is extremely important to record days rather than hours or any other measurement of time, unless your department particularly needs to report on numbers of hours.

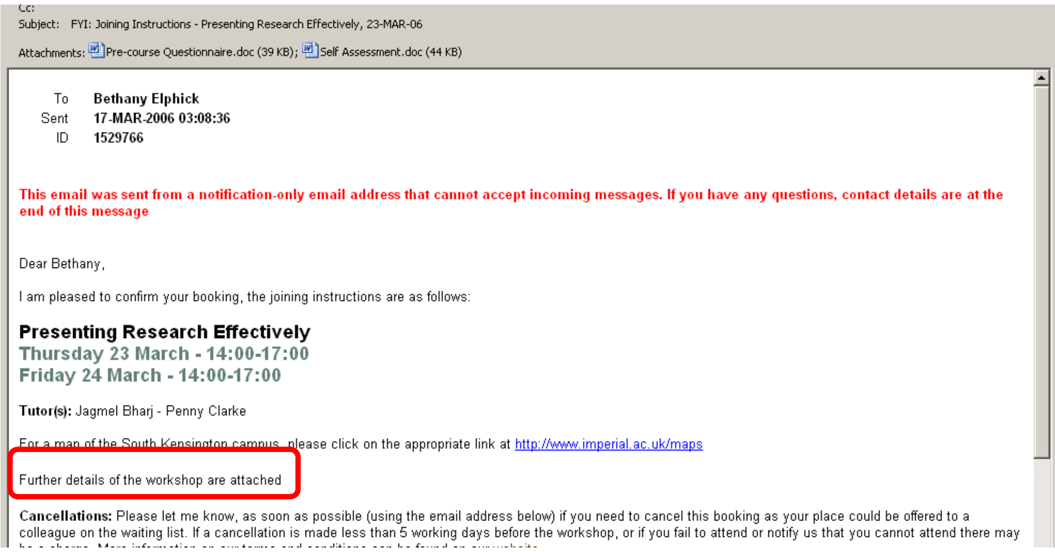
From the **Duration** drop-down list select **Days**.

The **Description** field is used to add any additional information about the related class to the Joining Instruction notification (which is attached at class level). Type text here if you would like it to appear in the Joining Instruction notification. For example, if the class is divided into sessions, the joining instructions that are fired at session level will not include venue information so you could type "*see programme attached which has details of the course, including course venue*" into the Description field.

You could use this field to remind delegates to return a pre-course questionnaire e.g. "Please return the completed pre-course questionnaire if you have not already done so."

You could also use this field to warn delegates that the Class may be cancelled due to a low take-up e.g. "Please note, due to the low number of enrolments for this particular course, there is risk of cancellation. It would be greatly appreciated if you could let any interested colleagues know about the course. If we do need to cancel we will notify you 5 days before the course. If you do not hear from us then please presume the course will run."

An example of where the text will be displayed in the Joining Instructions notification is shown below:


Subject: FYI: Joining Instructions - Presenting Research Effectively, 23-MAR-06

Attachments: Pre-course Questionnaire.doc (39 KB); Self Assessment.doc (44 KB)

To Bethany Elphick
Sent 17-MAR-2006 03:08:36
ID 1529766

This email was sent from a notification-only email address that cannot accept incoming messages. If you have any questions, contact details are at the end of this message

Dear Bethany,

I am pleased to confirm your booking, the joining instructions are as follows:

Presenting Research Effectively
Thursday 23 March - 14:00-17:00
Friday 24 March - 14:00-17:00

Tutor(s): Jagmel Bharj - Penny Clarke

For a map of the South Kensington campus, please click on the appropriate link at http://www.imperial.ac.uk/maps

Further details of the workshop are attached

Cancellations: Please let me know, as soon as possible (using the email address below) if you need to cancel this booking as your place could be offered to a colleague on the waiting list. If a cancellation is made less than 5 working days before the workshop, or if you fail to attend or notify us that you cannot attend there may

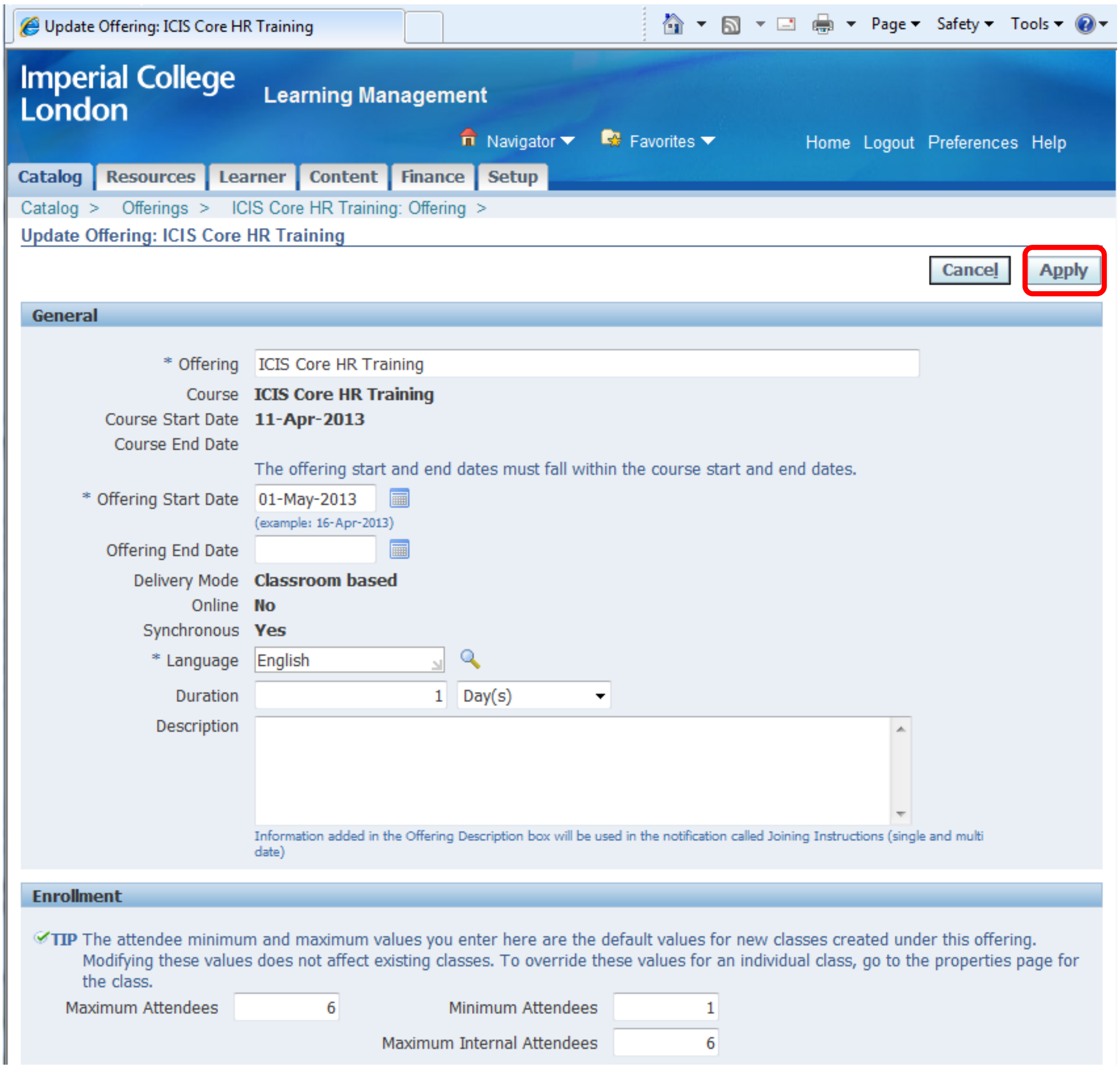
Note: It is very important to remember that any information you add here will go out with the Joining Instructions for all the classes set up within this offering. You must make sure that if you have added information for a particular class that you delete this information once the joining instructions have gone out, to avoid this information being sent out with the joining instructions for any future classes.

14. Type the maximum number of attendees for this Course in the **Maximum Attendees** field.

15. Type the minimum number of attendees for this Course in the **Minimum Attendees** field.

16. If applicable, type the maximum number of internal attendees in the **Maximum Internal Attendees** field.

17. Click the **Apply** button at the top-right or bottom-right-hand corner of the page.



The Offerings page is displayed with the newly created Offering displayed in the table and a confirmation message is displayed confirming that the Offering has been created.

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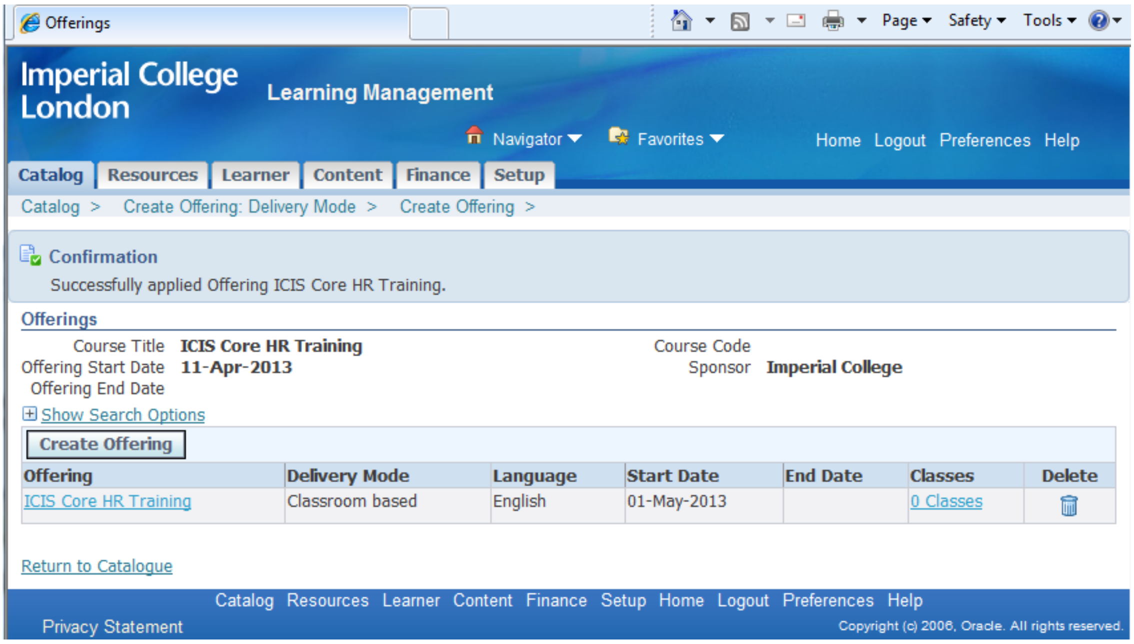

Update an Offering:

1. Navigate to the Offering page of the Offering you want to update.

2. Click the **Update** button at the top-right or bottom-right-hand corner of the page.

The Update Offering page is displayed.

3. Modify any of the fields on this page and then click the **Apply** button at the top-right or bottom-right hand corner of the page.

The Offering Page is displayed and a confirmation message appears at the top of the page confirming that you have successfully updated the Offering.

Creating classes:

This document shows you how to create and update a Class.

About Classes:

A Class is created within an Offering and has a specific date e.g. a Course could be Recruitment & Selection but a Class will be Recruitment & Selection – 1 February 2014.

Copying Classes:

When you have created a Class for a Course, you can speed up the process of creating additional Classes by copying the Class you have just created and just changing the date when the Class will occur. This is explained later in the chapter.

Booking Resources:

Resources must be booked at Class or Session level only.

Navigate to the Offering:

1. Log in to ICIS OLM and use your departmental OLM responsibility.
2. Double click on the **Learning Administration** menu option.

The Catalog window will open up.

3. Navigate to the Offering that you want to add a Class to.

Note: Before you create your Class, you might want to check what has been entered in the **Number of days for Course Notification** field at Course level. This is because you now have the option to override this period at Class level (using the field called **Override Number of days for Course Notification**). If this field is left blank, the joining instructions for this Class will be sent to delegates on the date you previously set at Course level (i.e. 7 or 14 days before the Class takes place).

Create a class:

1. In the Offering page click the **Manage Classes** button at the top-right or bottom-right-hand corner of the page.

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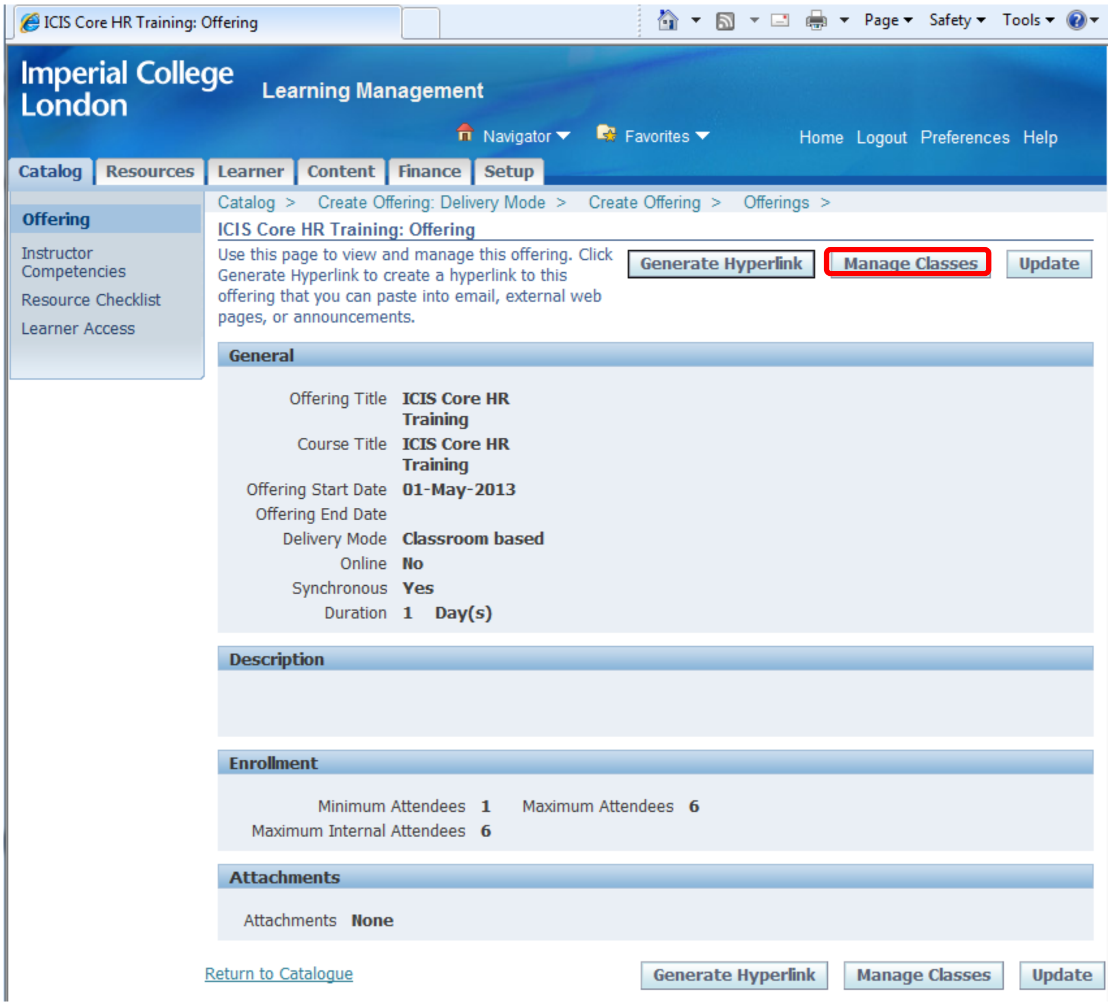
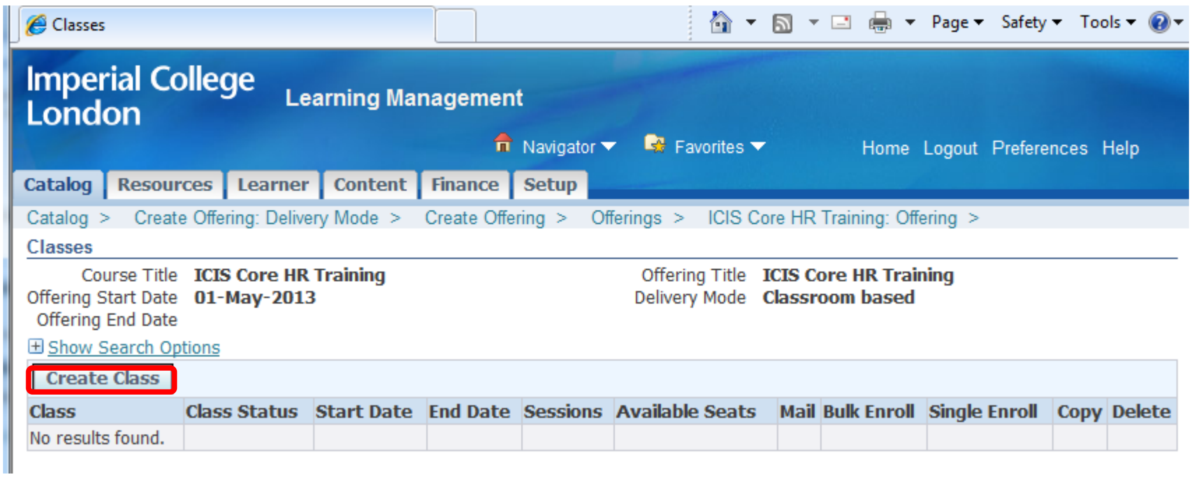


The Classes page is displayed.

2. Click the **Create Class** button on the left-hand side of the page.



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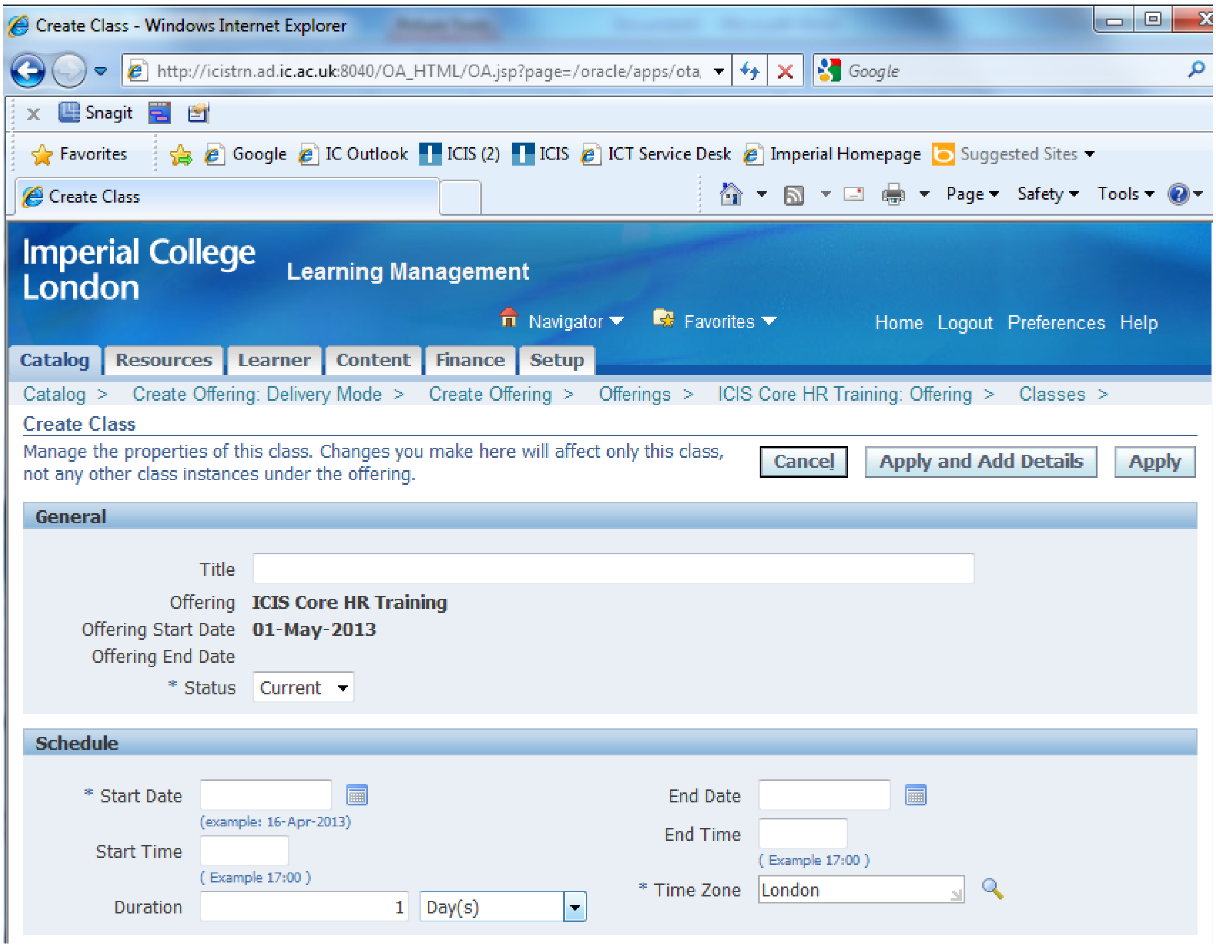
The Create Class page is displayed.



3. Under the heading **General**, type the name of the Class in the **Title** field in the following format:

Title – Date e.g.

Time Management – 11 Jan 2007

Time Management – 11, 12 Jan 2007

Time Management – 11, 14, & 15 Jan 2007

Time Management – Jan/Feb (5 days) 2007

Note: It is important that the title you type in here is unique and can be distinguished by its start date. This will enable you to distinguish the Class in other parts of the OLM system.

Note: Avoid using large hyphens in the class title because when we report on this, Discoverer will not recognise the symbol. If a hyphen is required in the title, ensure it is the smaller one (e.g. use “Class Title - Level 1”, not “Class Title – Level 1”).

4. The **Status** field automatically defaults to **Current**. You can change this to **Planned** if you do not want your class to be displayed via My Training at this stage or if you are awaiting confirmation of a trainer's availability etc.

5. Under the heading **Schedule**, type the date the Class starts in the **Start Date** field. If the Class takes place on more than one day, type the date of the first Class here.

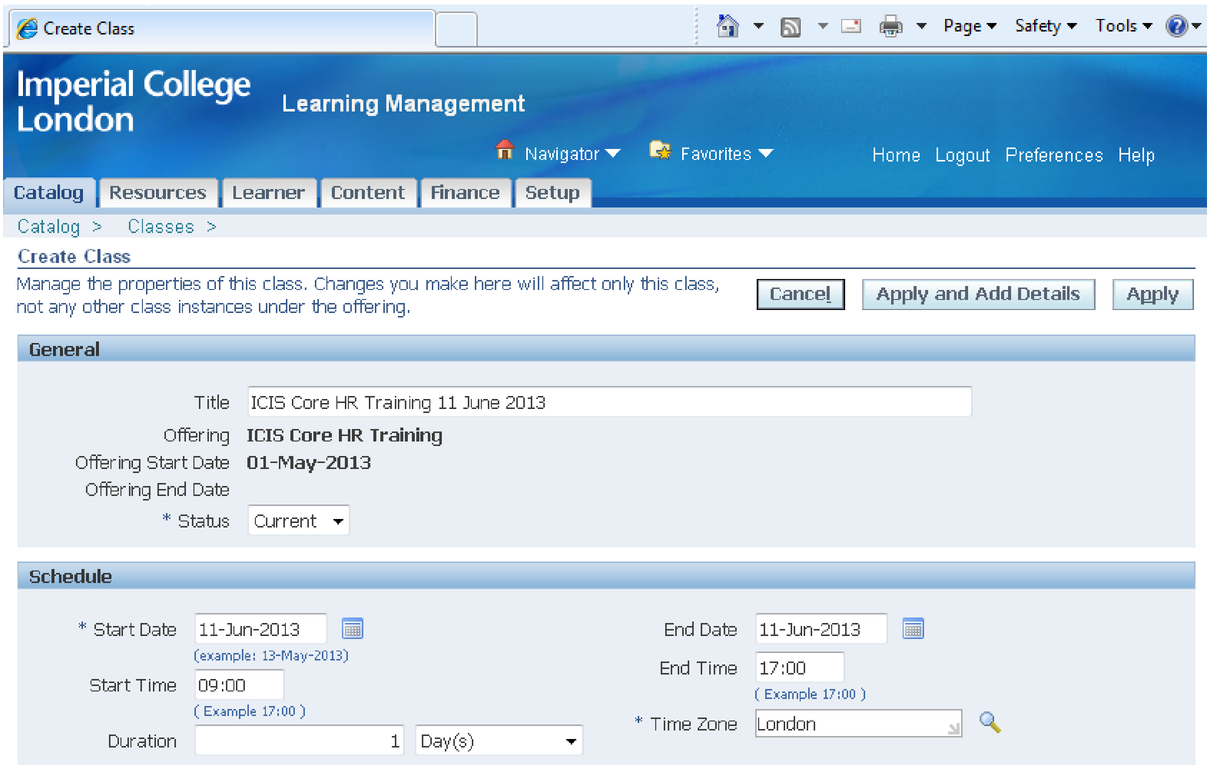
6. The **End Date** field will automatically default to the date entered into the Start Date field. If the Class takes place on more than one day, enter the last date the Class takes places on.

7. Type the time the Class starts in the **Start Time** field.

8. Type the time the Class ends in the **End Time** field.

9. If you are creating a Class that has a different duration to the Course you set up, then type the new duration of the Class into the **Duration** field. Please use one and half-day increments, e.g. 1 for one day, 0.5 for half a day.

10. Check that the **Duration** drop-down list shows the value Day. If it doesn't, click on the **Duration** drop-down list and select **Day**.



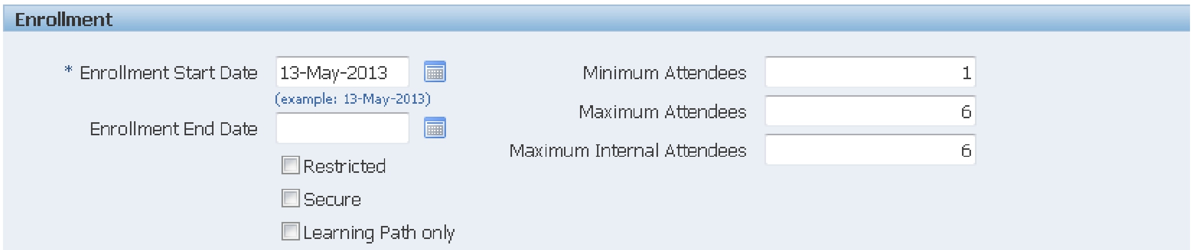
11. The **Enrolment Start** date field automatically defaults to the current date. If you are retrospectively creating a Class then enter the date of the earliest Class you are creating.

12. You can leave the **Enrolment End Date** field blank, unless you have a cut-off date when delegates should no longer enrol onto the Class. If so, type this date into the **Enrolment End Date** field.

13. The **Minimum and Maximum Attendees** fields automatically default with the values specified at Course level, however, you can change these by overtyping the values if required.

14. Leave the **Restricted** checkbox unchecked if you want all individuals with the 'My Training' responsibility to be able to view/enrol onto your class.

Note: It is important to check the **Restricted** checkbox if you do not want your class to show in My Training and would like to enrol delegates yourself.



15. If you want to override when Joining Instructions are sent to delegates before a Class start date, then type the required value into the **Override Number of Days for Course Notification** field. The values you can enter are:

00 – No Joining Instructions notification will be sent.

07 – Joining Instructions will be sent 7 days before the start date of the course.

14 – Joining Instructions will be sent 14 days before the start date of the course.

21 – Joining Instructions will be sent 21 days before the start date of the course.

28 – Joining Instructions will be sent 28 days before the start date of the course.

If you do not enter a value into this field, the joining instructions will be sent on the period selected at Course level.

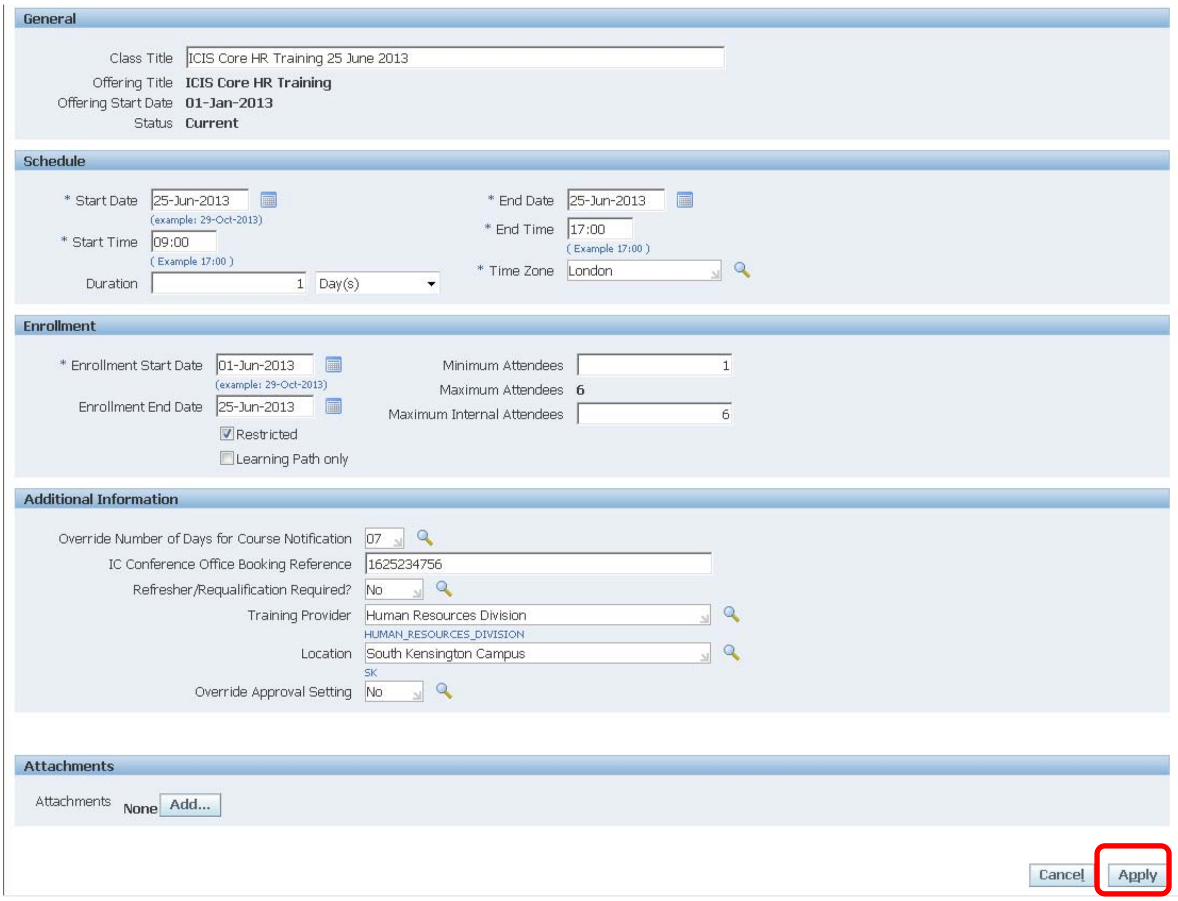
Tip: To see all values listed under the **Number days for Course Notification** field, type in a wildcard (%) on its own, and click **Find** (torch icon next to the field). This will return the full list of values above.

Note: If someone has been enrolled after the 14 day fire off, the joining instructions will not fire off 13, 12, 11, 10 etc days before the course start date but 7 days prior to course start date. If a delegate is enrolled after the 7 days fire off, the course notification will go out 6, 5, 4, 3, 2 or 1 day prior to course start date.

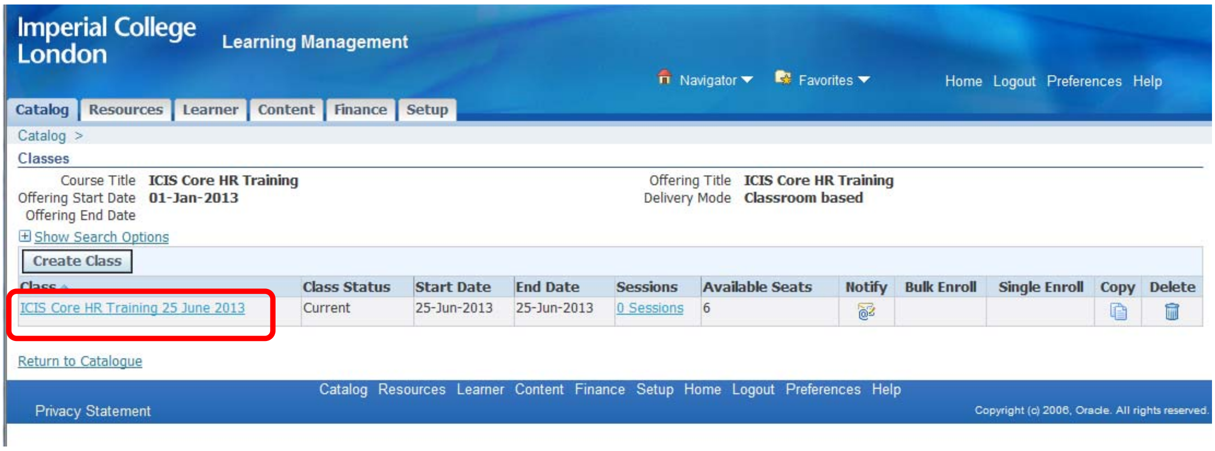
16. Type the conference office booking reference number into the **IC Conference Office Booking** field (if you have one).

Note: Internal Bookings at South Kensington will always supply a booking reference number in two instances: if the room is in the Seminar & Learning Centre or if catering or equipment is ordered for an event anywhere on the South Kensington Campus. There will not be a booking reference number supplied if a room is booked through a Faculty at South Kensington (e.g. a Sir Alexander Fleming room, booked through Medicine) or if a room or catering is booked on any of the other campuses.

17. Click the **Apply** button at the top-right or bottom-right-hand corner of the page.



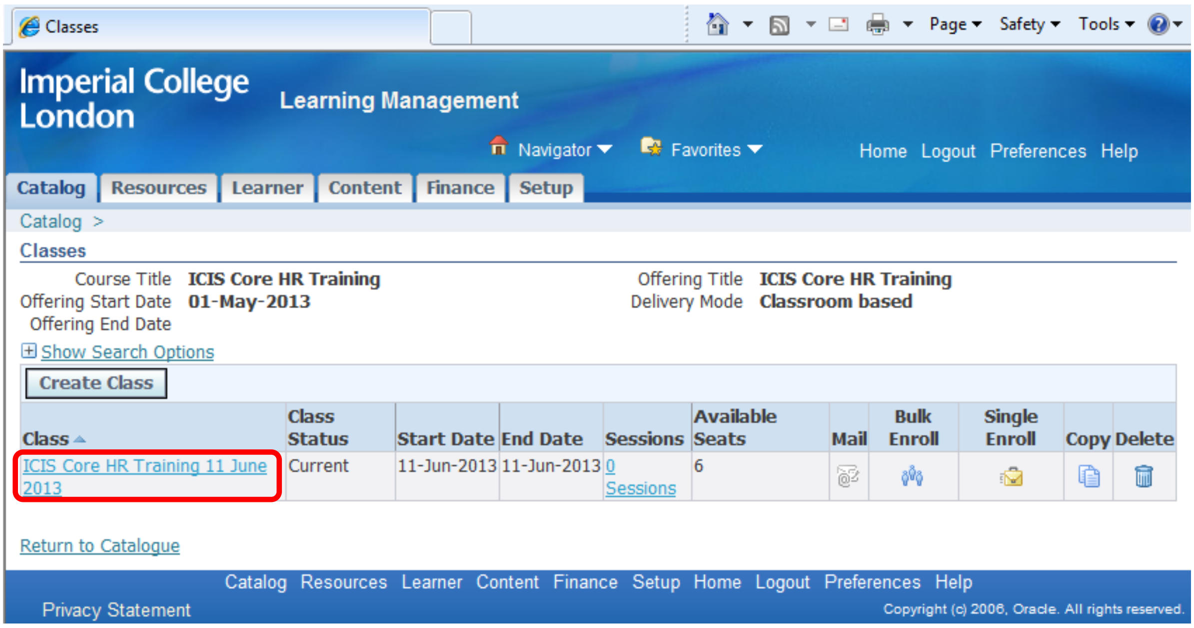
The Classes page is displayed and the Class you just created will be displayed in the table.



Add an Attachment to a Class:

1. Navigate to the Class that you want to add an attachment to.

2. Click on the name of the Class.



The Class page is displayed.

3. Click the **Update** button at the top-right or bottom-right-hand corner of the page.

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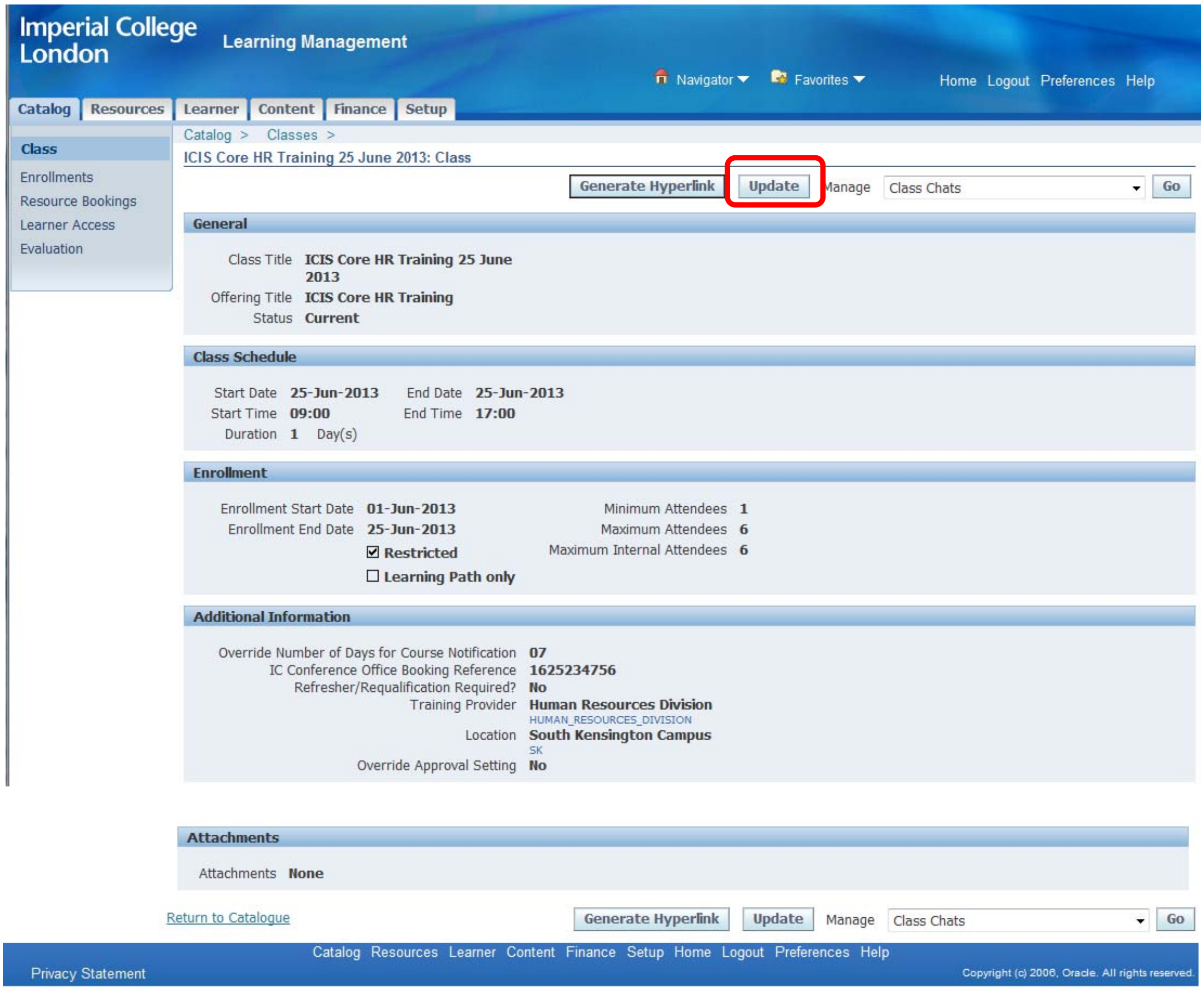
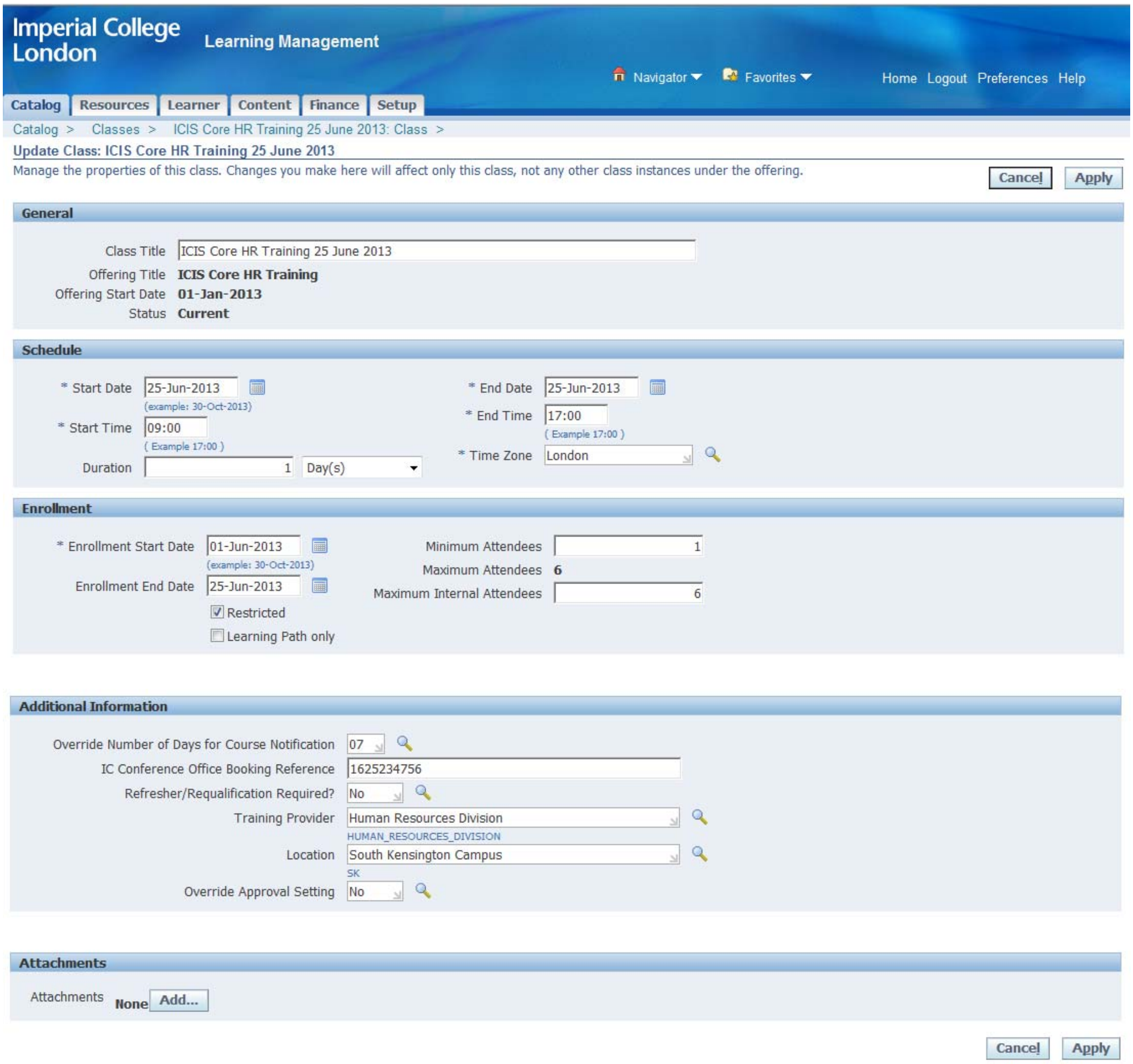
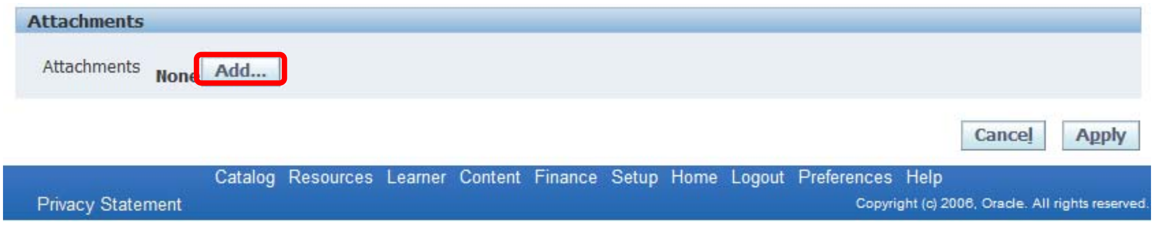


The Update Class page is displayed:

OLM GUIDANCE NOTES



4. Click the **Add** button at the bottom-left-hand corner of the window.

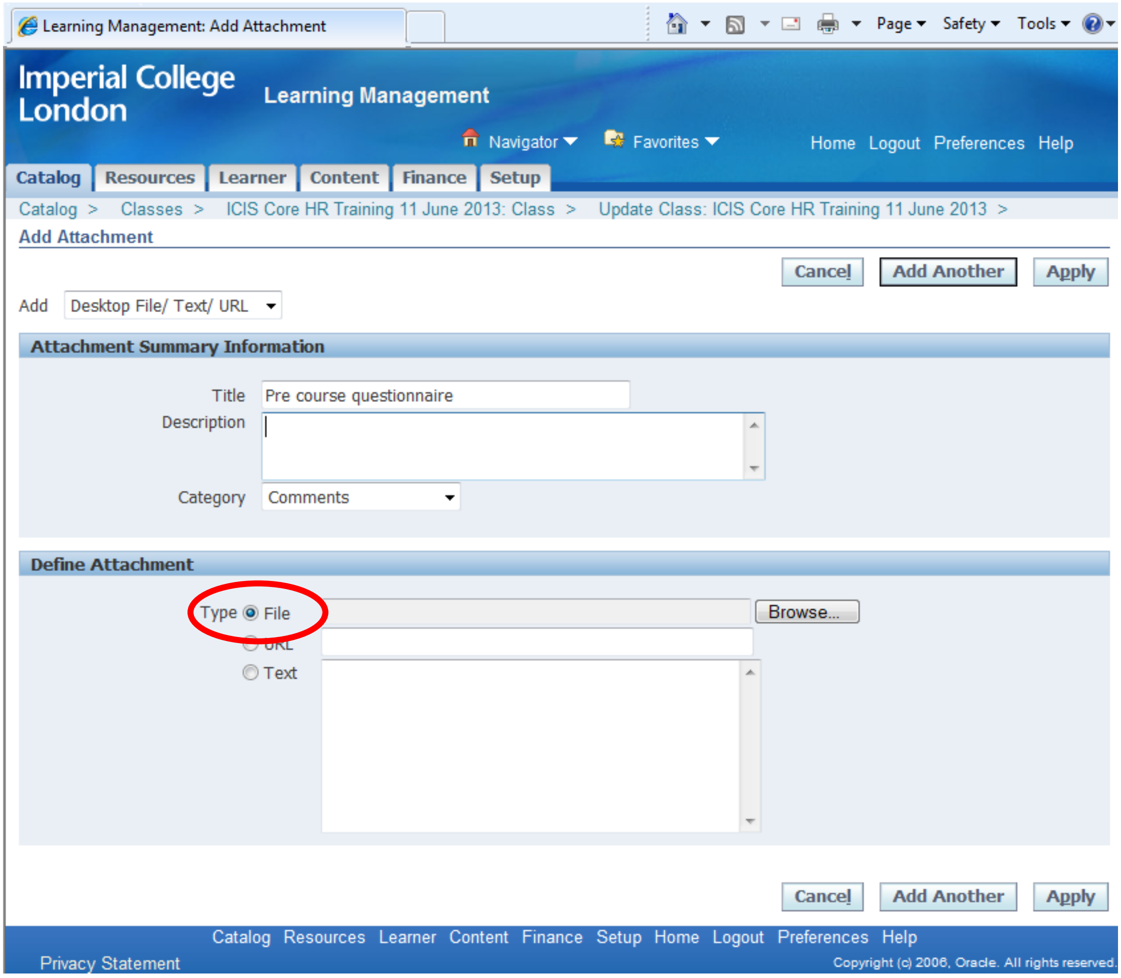


The Add Attachment page is displayed.

5. Type the name of the attachment in the **Title** field e.g. “Programme”.

Comments will appear as the default in the **Category** drop-down list. Please leave this as it is.

6. Click the File radio button ( ) next to the **Type** label.



Note: Please attach Files only. URLs and Text attachments cannot be used with notifications. The types of Files that can be attached are Word docs without the symbol “&” written in the file name, PDFs, PowerPoint docs and Excel docs. The maximum number of attachments is 5.

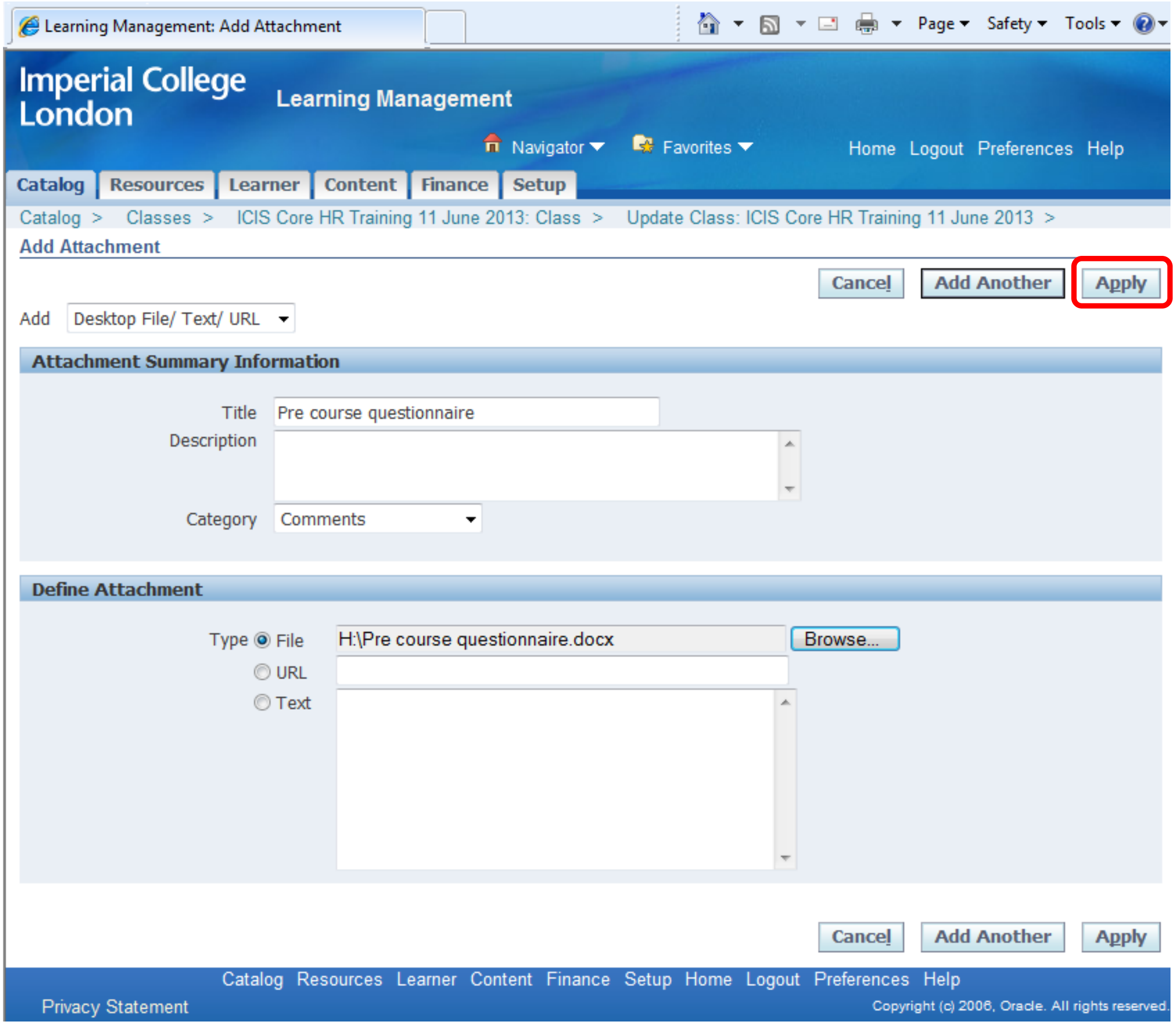
7. Click the **Browse** button next to **File** field:

The **Choose File** window will appear on the screen.

8. Find the document you want to attach and double-click on it to attach it to the Class.

The location of the document will automatically be displayed in the **File** field.

9. Click the **Apply** button at the top-right or bottom-right-hand corner of the window.



The Update Course page is displayed and a confirmation message will be displayed to confirm that the document has been added successfully but not committed.

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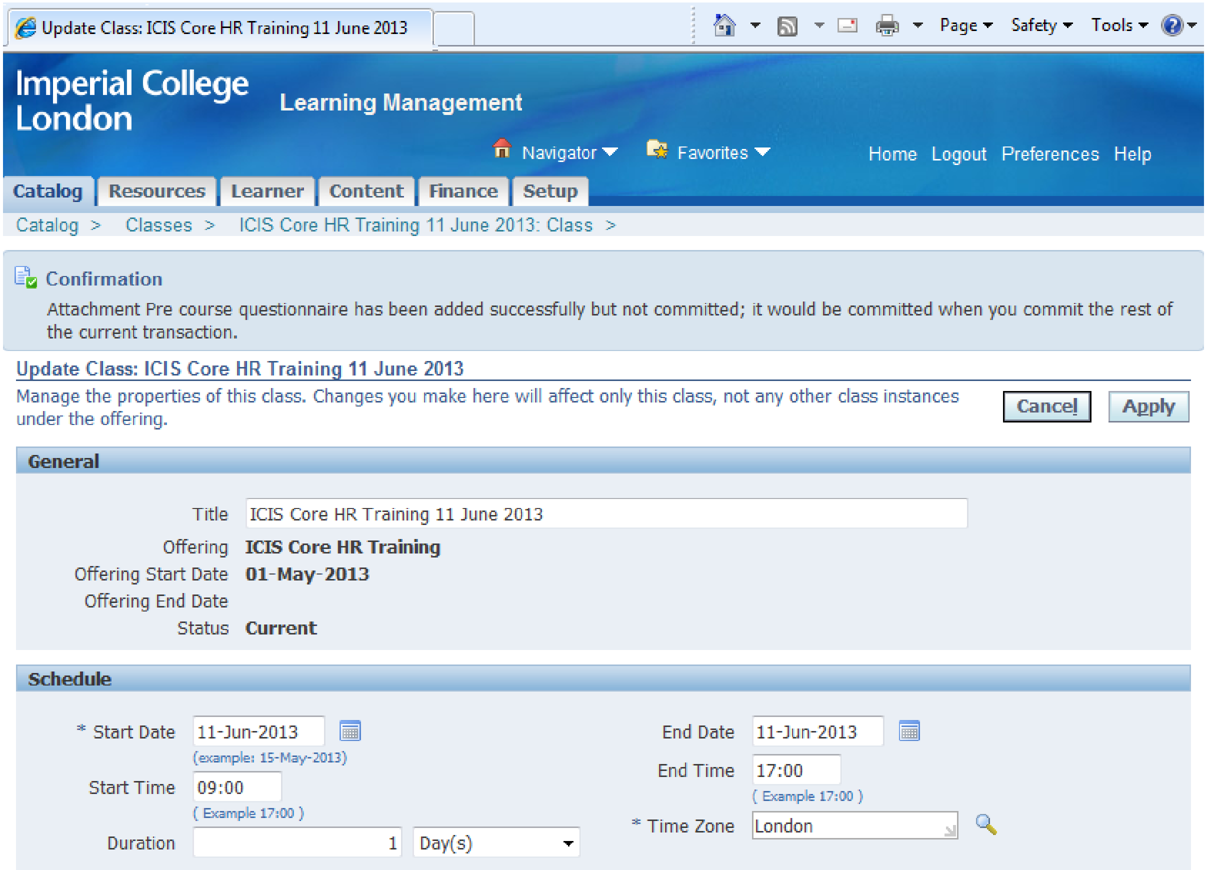
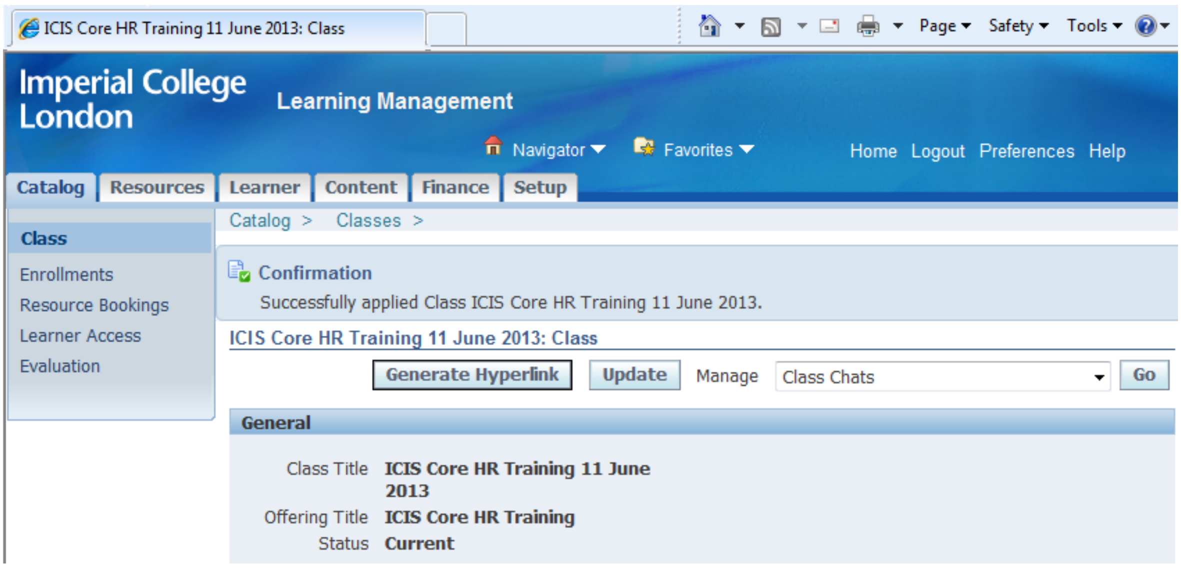


10. Click the **Apply** button at the top-right or bottom-right-hand corner of the screen to commit and save your work.

11. The Class page is displayed and a second confirmation will be displayed to confirm that the Class has been saved.



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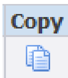
15. If you would like to add some information about the attachment or about the class in general you can do so in the description field of the Offering for this class.

Note: Your attachment must not have a ‘&’ in the title of the document (i.e. in the name of the file) as it prevents the joining instructions from firing off. If you have a programme with two dates e.g. *Time Power Programme - Mon 19 Aug 2013 and Tues 27 Aug 2013,* please make sure you use ‘and’ rather than ‘&’.

Copying a Class:

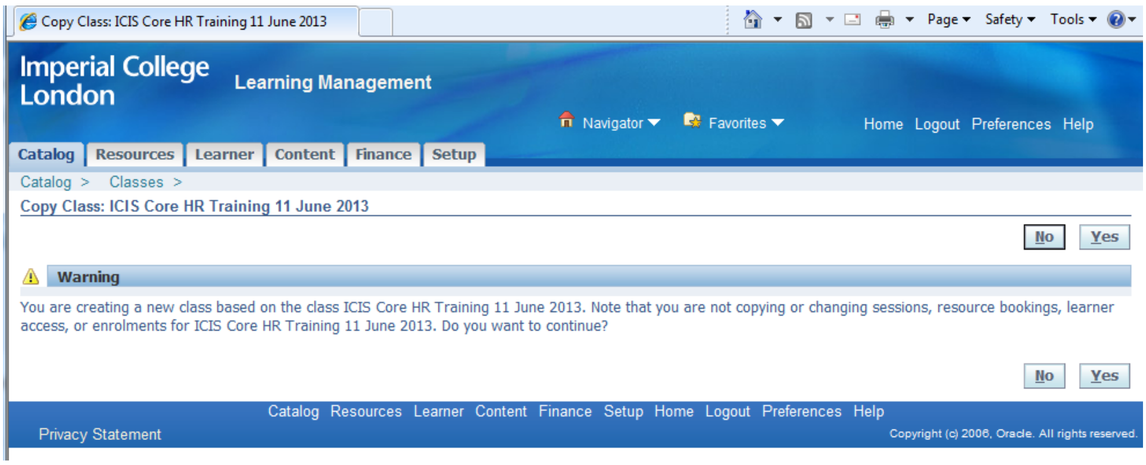
If you are creating a number of classes with the same course title, it will be quicker to use the ‘Copy Class’ option.

1. Navigate to the Classes page that contains the Class you want to copy.

2. Click the respective Copy Class icon 

for the Class you want to copy.

A warning message will ask you if you want to continue with copying the selected class.



3. Click the **Yes** button at the top-right or bottom-right-hand corner of the page if you are certain you are copying the correct class.

The Classes page will be displayed and a copy of the Class is listed in the Classes table with (copy) next to the name.

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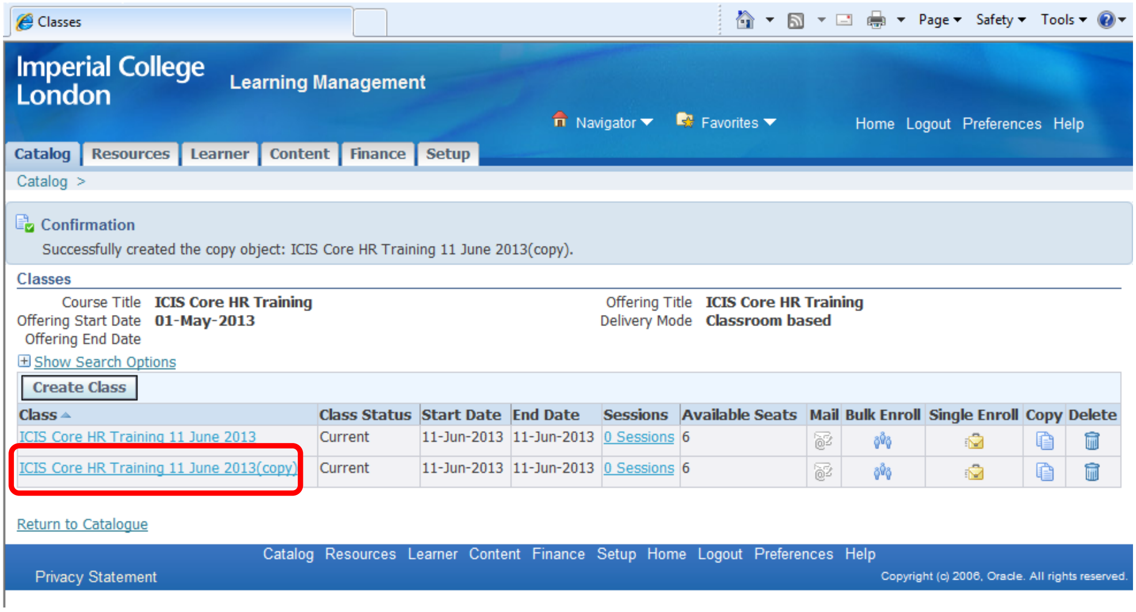

4. Click on the name of the new Class you just copied.

The Class page will be displayed.

5. Click the **Update** button at the top-right or bottom-left-hand corner of the page.

The Update Class page will be displayed.

In the **Create Class** form, click **Update** and overtype any details e.g. the title, start and end dates, enrolment dates and notification days, as required.

6. You can now modify the details of this new Class.

7. When you have finished modifying the details, click on the **Apply** button at the top-right or bottom-right-hand corner of the page to save your changes.

The Class page will be displayed and a confirmation message will be displayed to confirm that the Class has been saved.

Adding Classes Retrospectively:

If you are adding a number of classes retrospectively with the same course title as others that already exist, it will be quicker to use the ‘Copy Class’ option rather than the ‘Create Class’ option. Please see notes above on how to copy classes.

Important notes to remember:

Enrolment dates - in order to enrol delegates onto your class retrospectively, you should either leave the enrolment end date field blank or make this the same day that you are enrolling delegates. If you enter this as the date of the class, you will not be able to enrol any delegates.

Notification days – to ensure delegates do not receive a confirmation of booking notification, please set the course notification field to ‘00’ so that this does fire.

There is no need to add resources i.e. trainer or venue, unless you know that your department will be reporting on these.

Enrolling Delegates Retrospectively:

All delegates should be enrolled as ‘Attended’, ‘Absent’ etc. and not as ‘Booked’. This ensures that the enrollment status is updated and that the delegates do not receive an automatic booking confirmation notification.

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Sessions:

This document shows you how to create a Session.

About Sessions:

Sessions are created under Classes and are used when Classes are delivered over a number of days e.g. Recruitment & Selection - Day 1 – 1 Feb 2013 and Recruitment & Selection - Day 2 – 2 Feb 2013. A Session cannot be created without a Class being created first.

Sessions are also used to record and supply more information for multiple day classes e.g. for a Recruitment & Selection course that has a class taking place on 11 & 12 October and a follow up on 13 November, may have a session on 11th October between 09.30 to 12.30, another on 12 October between 14:00 and 17:00 etc, as the three separate dates cannot be recorded in one class.

At Session level there are a few things to note in connection with the joining instructions notifications. The joining instructions, which normally outline the venue and class dates, will only list the dates of the various sessions. The delegate will need to open the attached programme for information on the venues, which may be different for each session. For this reason, you may wish to write something in the **Intended Audience** section when creating the course offering, such as "*see programme attached which has details of the course, including course venue*".

Resources are booked at class level with special attention given to dates and times these are booked.

Navigate to the Classes page:

1. Log in to ICIS OLM and use your departmental OLM responsibility.
2. Double click on the **Learning Administration** menu option. The Catalog window will open up.
3. Navigate to the Classes page containing the Class you would like to add a Session to.

Create a Session:

1. Click the name of the class you would like to add a Session to.

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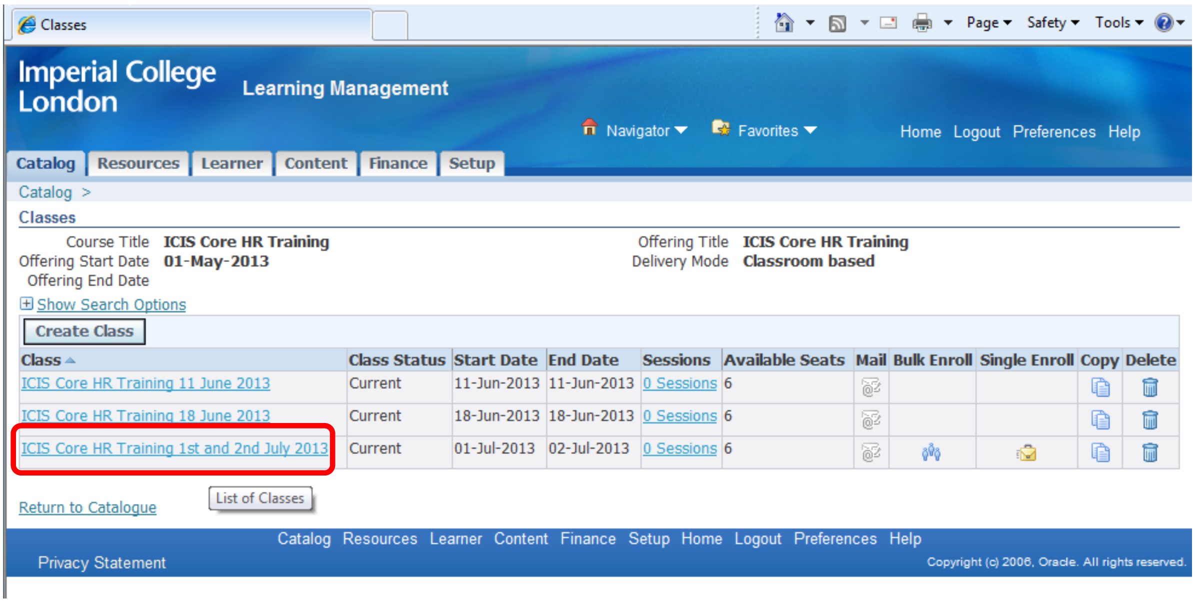
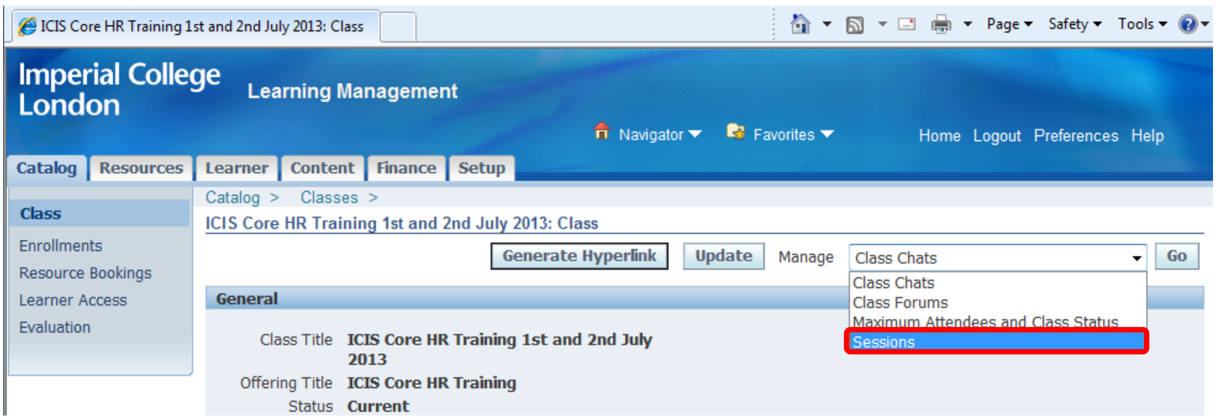


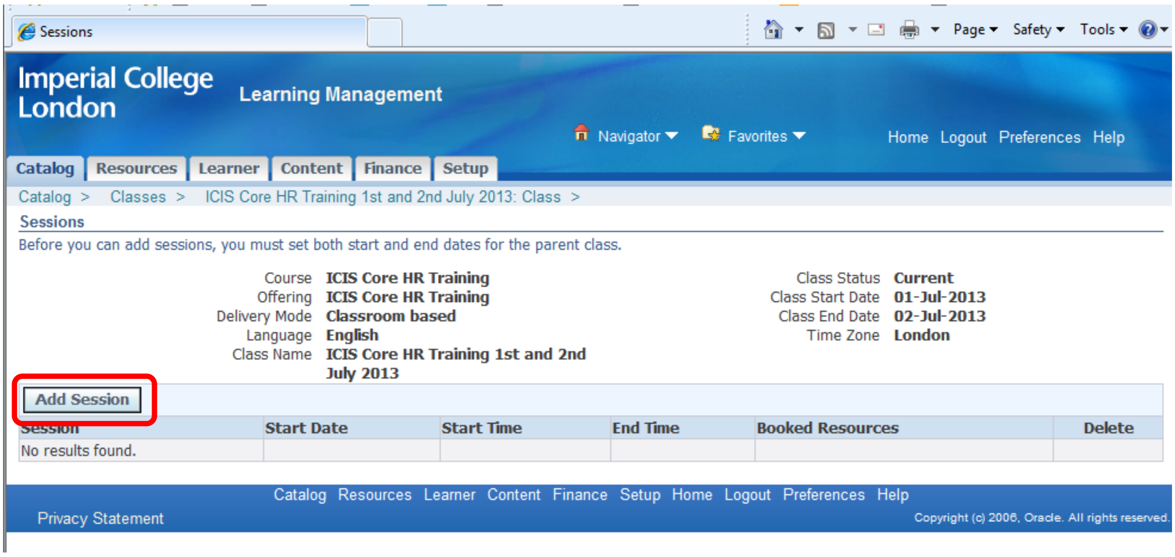
The Class page is displayed.

2. Go to the top right hand screen and select ‘**Sessions**’ from the Manage drop down list that will currently read Class Chats. Click **Go**.



The Session page is displayed.

3. Select the ‘**Add Session**’ button as seen below.



4. Type the name of the Session into the **Session Title** field using the following format:

Title – Day Number Date e.g. Time Management - Day 1 - 11 May 2008

Note: Avoid using large hyphens in the session title because when we report on this, Discoverer will not recognise the symbol. If a hyphen is required in the title, ensure it is the smaller one (e.g. use “Session Title - Level 1”, not “Session Title – Level 1”).

5. If required, add in the Training Centre e.g. PQ – Faculty of Natural Sciences in the **Training Centre** field.

6. If required, add in the location of where the session will take place e.g. SK Bioengineering.

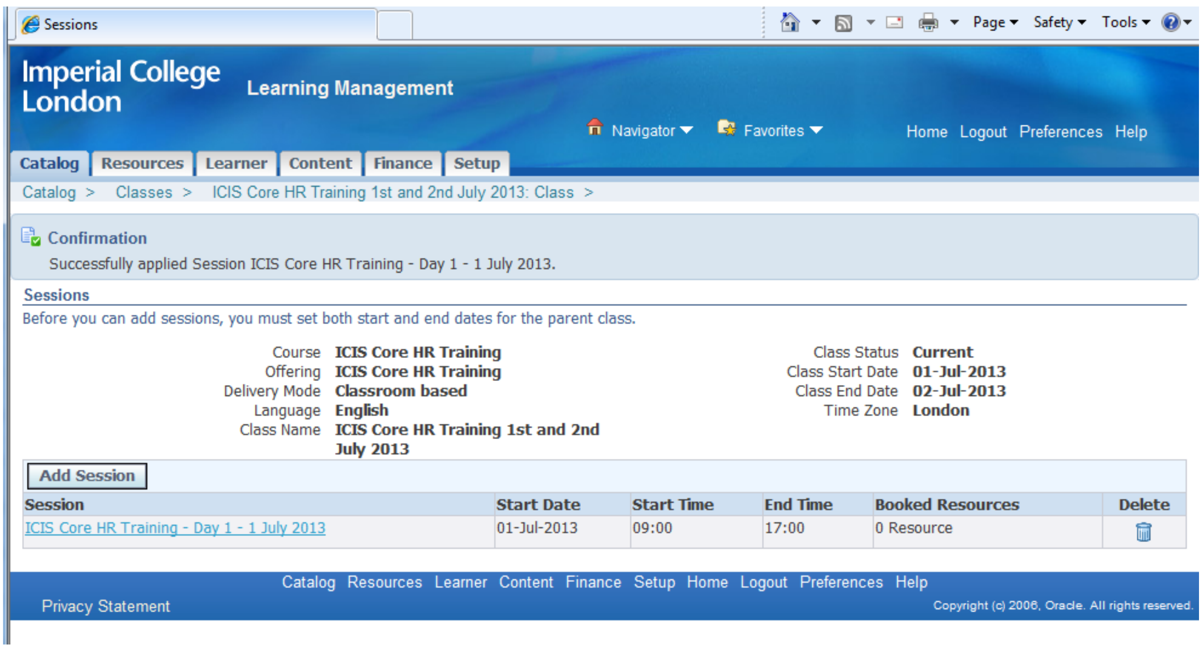
7. The start date will automatically default to the start date of your class. If required, overtype the date in the following format DD_MMM_YYYY or select the date from the calendar.

8. Enter the start time of your session into the **Start Time** field e.g. 09:00.

9. Enter the end time of your session into the **End Time** field e.g. 17:00.

10. Click the **Apply** button at the top-right or bottom-right-hand corner of the page.

The Sessions page is displayed and a confirmation message confirms that the Session has been created.



11. If you have more Sessions to create for this Class, click the **Add** button and repeat the same steps above.

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Update a Session:

1. To update a session you've created, navigate to the relevant session and select the **Update** button from the top right or bottom right hand corner.

The Update Session page is displayed.

2. You can now change any of the fields you wish to. When you have finished click the **Apply** button at the top-right and bottom-right hand corner of the page.

The Sessions page is displayed and a confirmation message is displayed at the top of the page confirming that your Session has been updated.

Allocate a Resource to a Class or Session:

This chapter shows you how to allocate a resource to a Class or Session.

About Allocating a Resource (Trainer and Venue):

Resources must first be set up as a Resource Type by an OLM Superuser Once they have been set up, the Course Administrator can then allocate them to the appropriate classes/sessions. These notes focus on allocating resources.
The resources that we currently use are Trainer and Venue. The Resource Name for a Trainer is the full name of the person delivering training.

The trainer’s name and the venue will be included on the joining instructions sent to class delegates X days before the class/session takes place. It is therefore important that the trainer and the venue details are correct when allocating theses resources to classes.

There is one exception to the above, which applies to Classes with sessions. The joining instructions for these classes will list the session dates and the trainer but not the different venues (if applicable). In this scenario, the venue details should be included in the attached programme.

Resources should be booked at Class level and **not** at Offering level, as the resources you book at Offering level will be applied to all your classes and therefore be included in any joining instructions sent for these.

Navigate to the Classes page:

1. Log in to ICIS OLM and use your OLM departmental responsibility.

2. Double click on the **Learning Administration** menu option.

The Catalog window will open up.

3. Navigate to the Classes page containing the Class you want to add a Resource to.

Allocating the Resources:

1. Click the name of the Class you want to add a Resource to.

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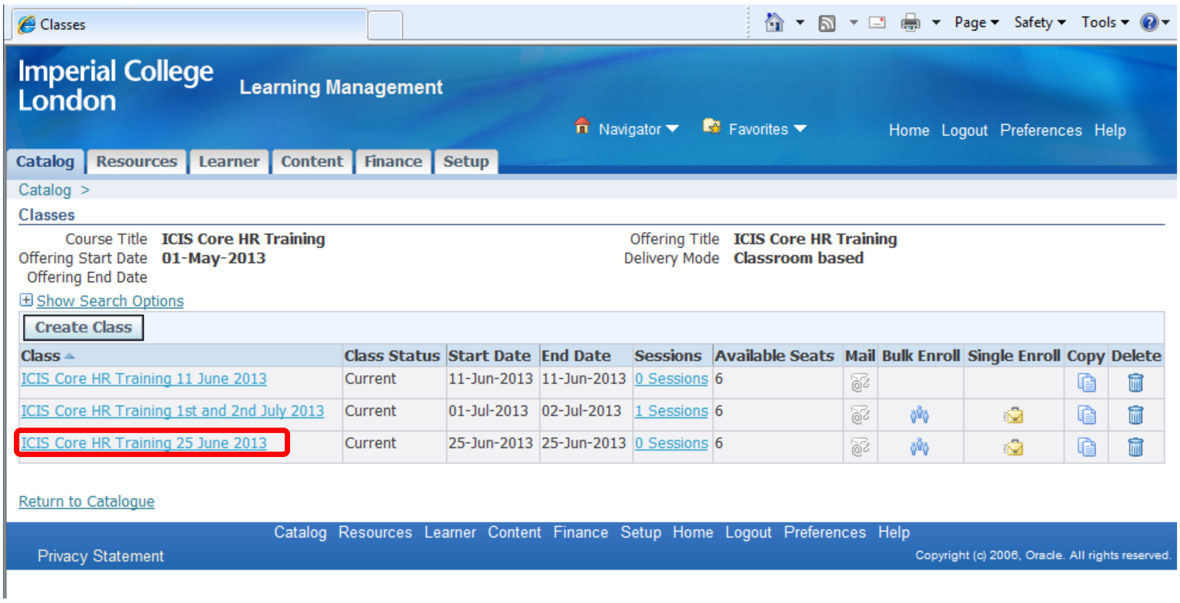
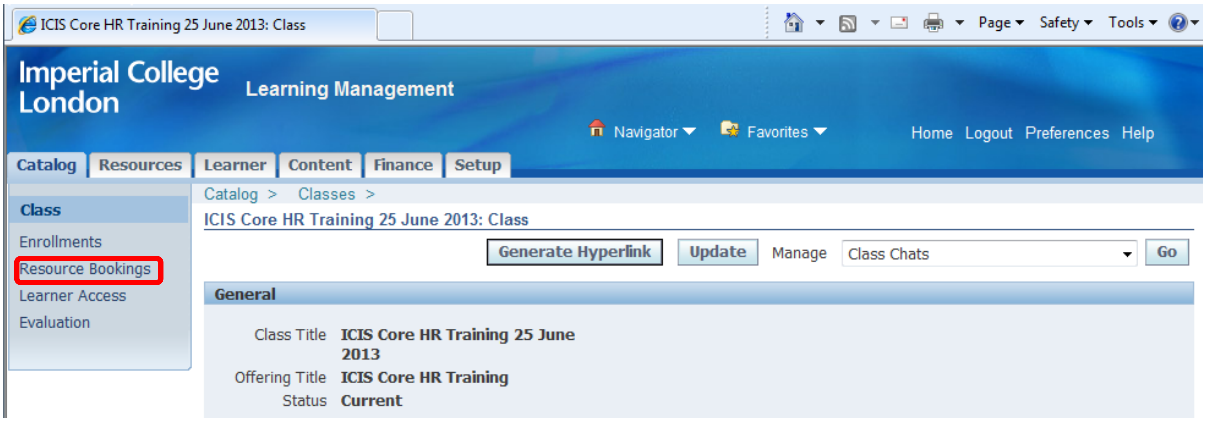


The Class page is displayed.

2. Click the Resource Bookings option in the left-hand menu.

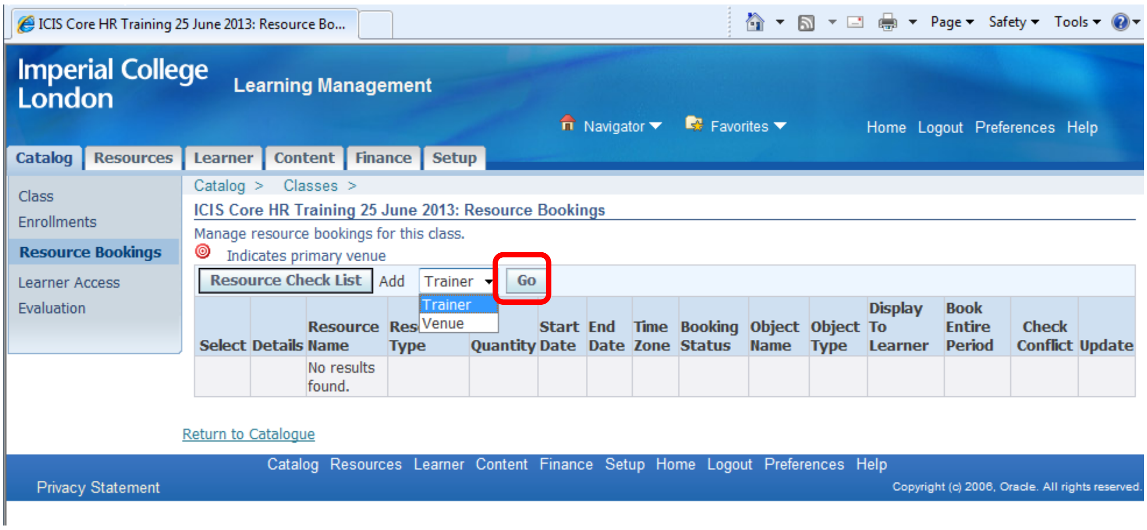


The Resource Booking page is displayed.

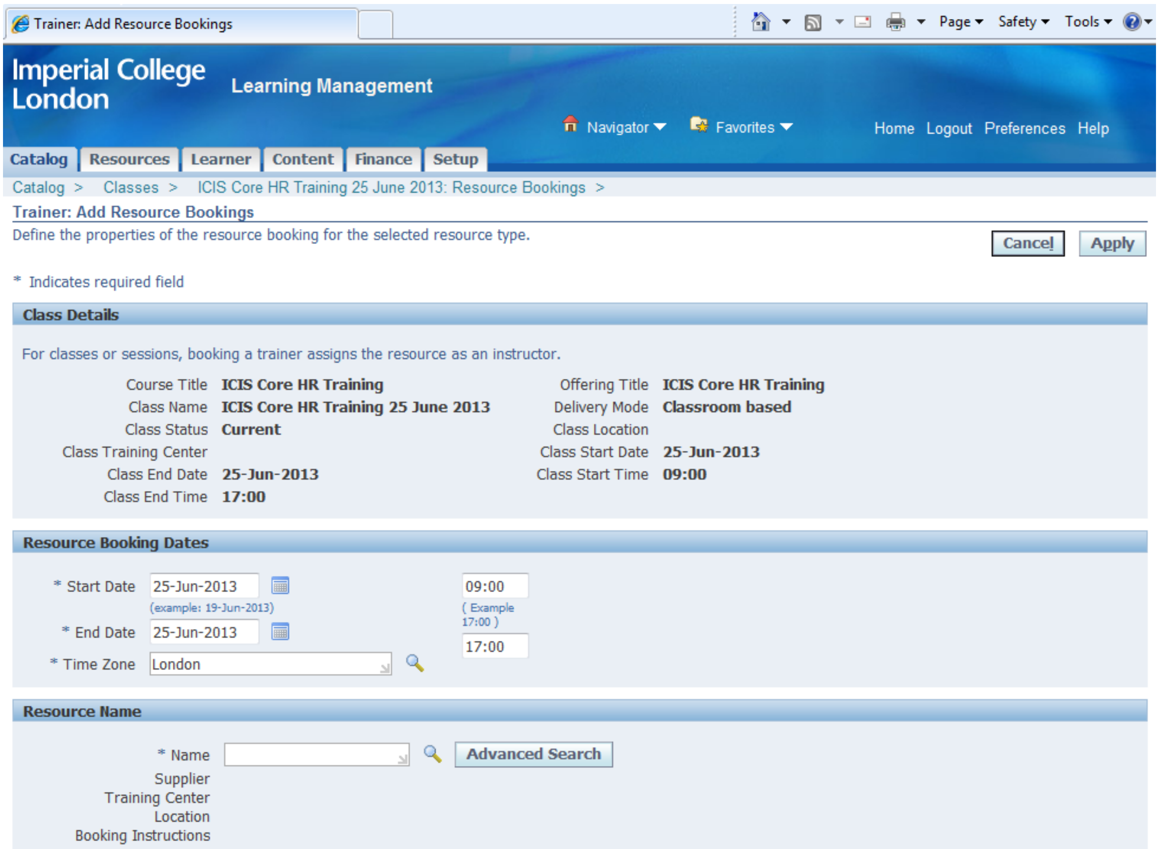
3. From the **Add** drop-down list, select the type of resource you want to add.

4. Click the **Go** button.

OLM GUIDANCE NOTES



5. The Add Resource Bookings page is displayed for the resource type you are adding.



6. If you are allocating a resource to a Class, check that the **Start Date** field, **End Date** field, **Start Time** field and **End Time** field are the same as the dates and times for the Class you allocating a resource to.

7. If you are allocating a resource to a Session, enter the respective start and end dates, and start and end times into the respective fields on the page.

Note: If there are multiple sessions for a Class, the Start/End dates and Start/End times will depend on whether the selected resource is being used for every class/session for that Course or not e.g. if the same trainer is used on 10^{th} and 11^{th} October the Start Date will be 10th Oct and the End Date will be 11th Oct. On the other hand, if the venue, for example, is different for both dates, both the Start and End Dates for the first Session will be 10th Oct, and both the Start and End Dates for the second Session will be 11th Oct.

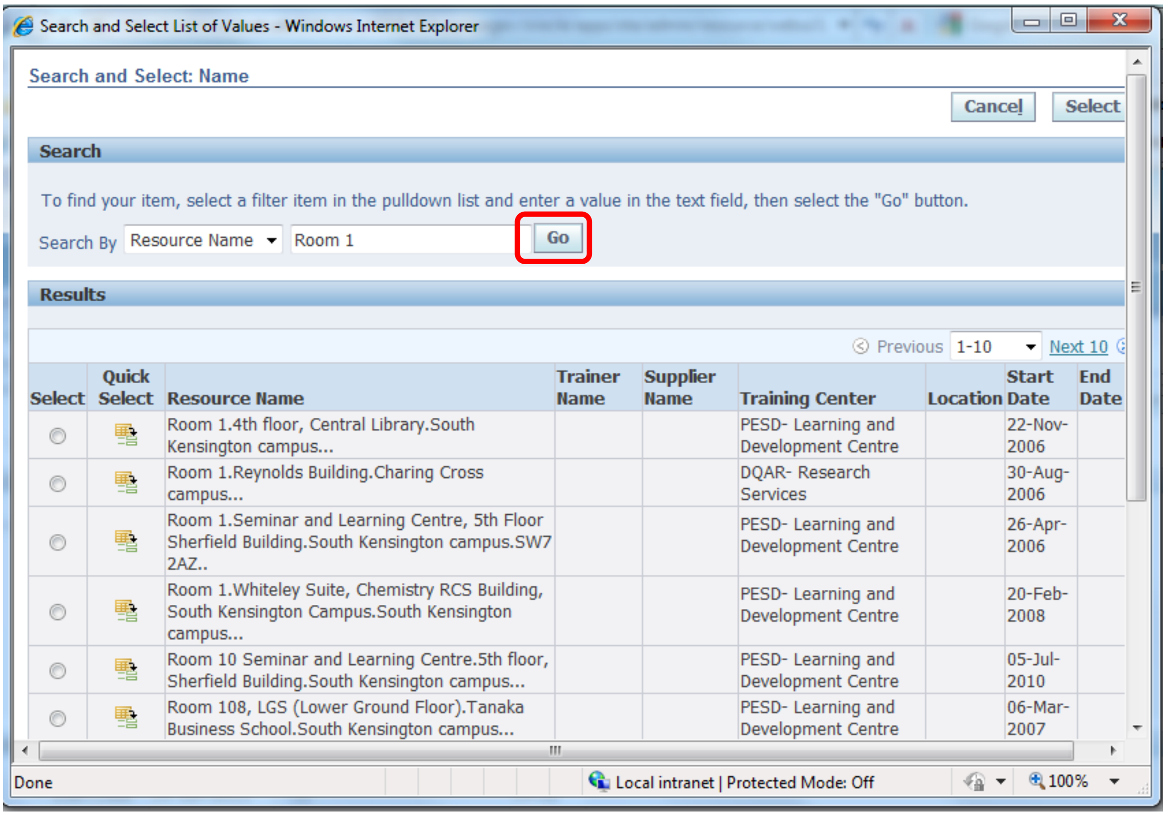
Start and End dates can be different when allocating resources for multiple classes/sessions e.g. if a trainer is used for five days, running over 8^{th}, 9^{th}, 10^{th}, 11^{th} and 12^{th} January, then the 8^{th} Jan and 12^{th} Jan can be entered as the Start Date and End Date retrospectively. This is only if the Start and End Times are the same on all classes/sessions, otherwise it will have to be entered as a separate resource allocation.

8. If you know the name of the resource you are allocating, type it into the **Name** field e.g. name of the trainer or venue. Alternatively, click on the **Torch** Icon next to the **Name** field and search using the search window.

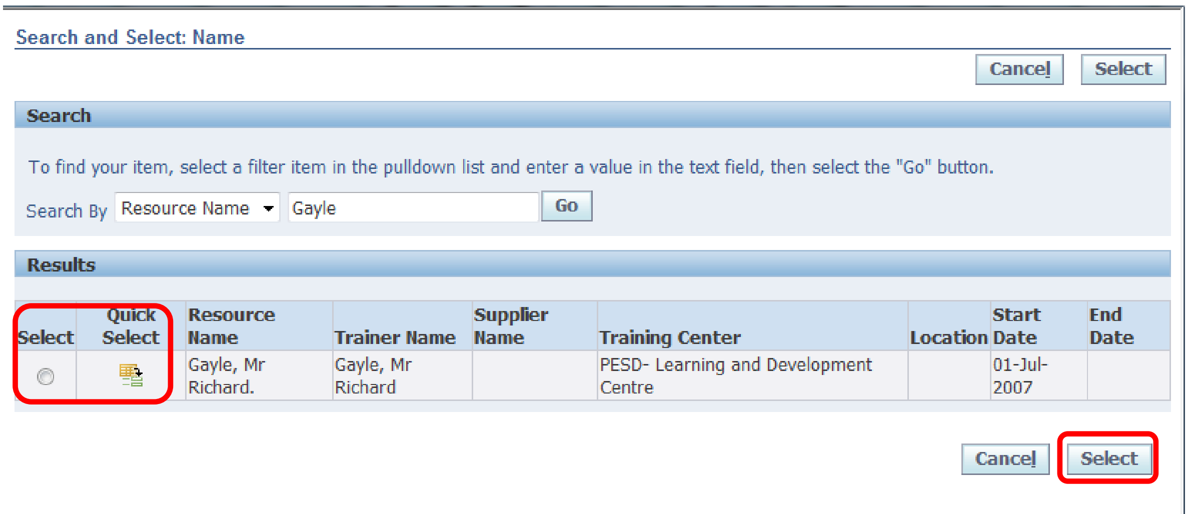
Note: If searching for a SALC room, the system will not recognise the word ‘SALC’. You will need to search using ‘Room 1’, ‘Room 2’ etc.

9. When in the Search window, enter your search query into the **Search By** field and then click the **Go** button:

10. A list of resources will be displayed in the Results table as seen below.



11. Select a resource by clicking on the respective **Quick Select** button or by clicking on the respective **Select** radio button and then click on the **Select** button at the bottom-right hand corner of the page.



The Search window will disappear and the Add Resource Bookings is displayed.

12. The resource you selected will appear in the **Name** field:

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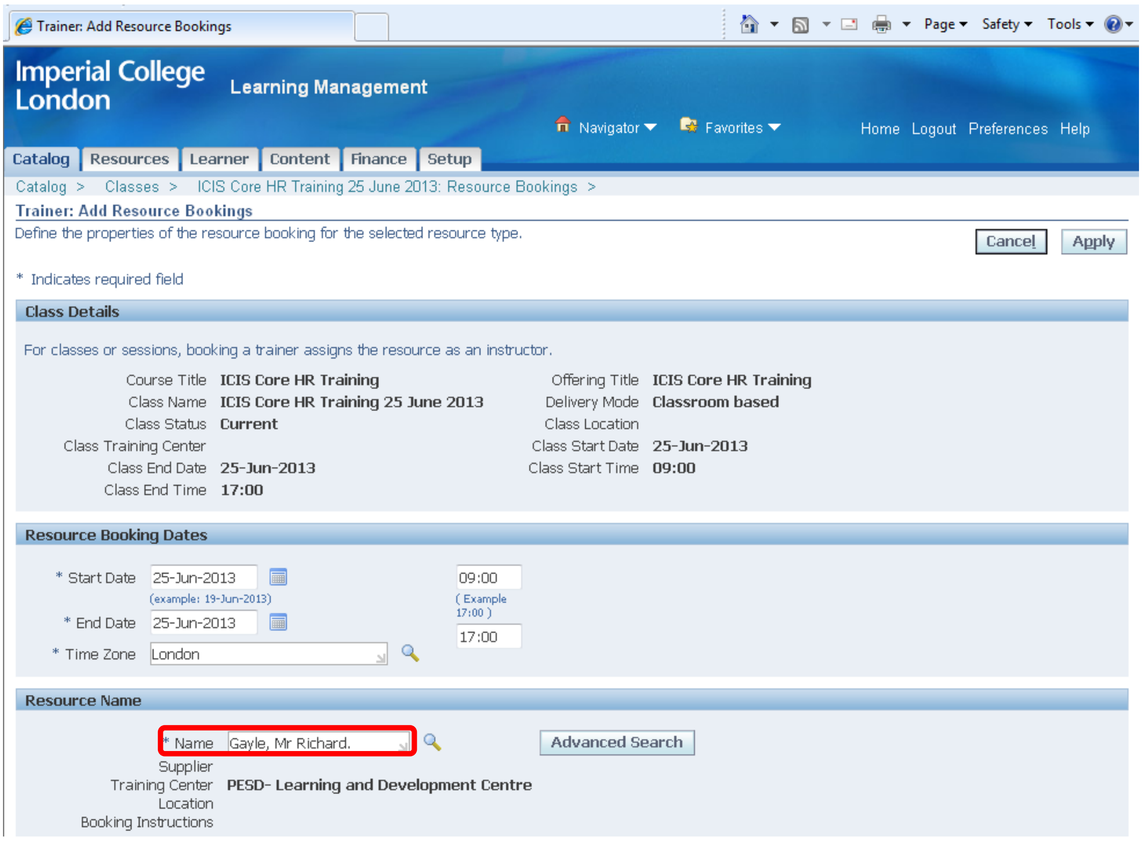


13. Check that the **Booking Status** field is set to **Confirmed**.

14. The **Date Booked** field will automatically default to today's date.

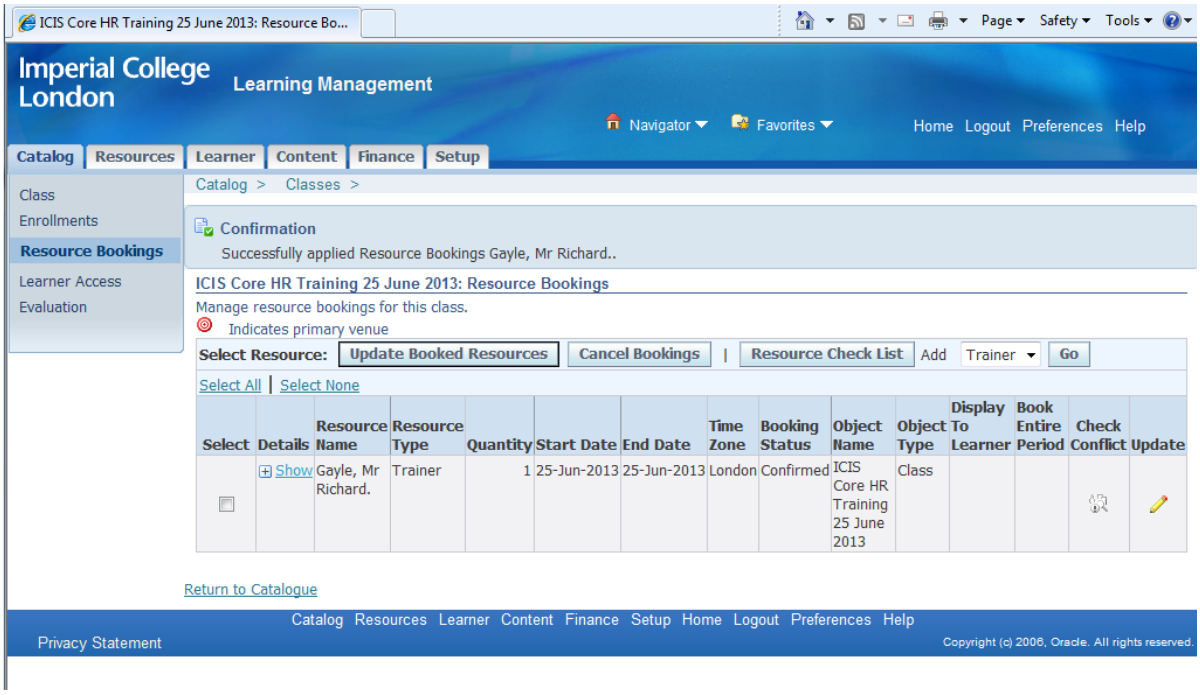
15. The **Booked By** field automatically defaults with your ICIS username.

16. In the **Display to Learner** field, select Yes or No from the drop down menu. By selecting Yes, the trainer/venue details will be displayed in the relevant classes/sessions joining instructions.

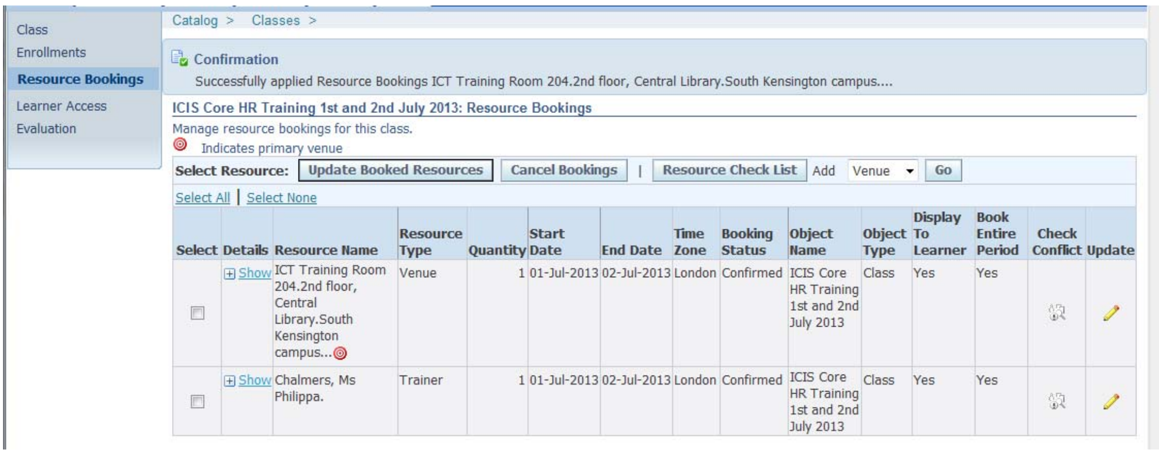
17. In the **Book For Entire Period** field, select Yes or No from the drop down menu. By selecting Yes, the trainer/venue details will be booked for the entire duration of your class/session.

18. Click the **Apply** button at the top-right or bottom-right-hand corner of the page.

The Resource Bookings page will display and a confirmation message will appear at the top of the page confirming that the resource has been allocated. The resource will also be listed in the table.



Note: A Class/Session could end up with a number of various resource bookings. For example, multiple resources could be allocated to one date or a number of classes/sessions can have multiple resources allocated to all dates. Another scenario is that multiple classes/sessions could have one resource allocated throughout the whole Course. This can be organised by simply repeating the steps above and typing in the dates the resource is required into the **Start Date** and **End Date** fields. Eventually, the **Resource Bookings** form for a Class could end up looking similar to this:



Tip: Once a resource has been allocated, it is possible to update or remove the details from the **Resource Booking** form by clicking onto the **Update** and **Cancel Bookings** icons.

19. If you need to add more than one trainer for a class you can do so but it is recommended not to add more than three. If the class involves more than three then simply add the main trainer and list the others in the **Description Field** of the **Offering** form.

Managing Enrolments

Adding new enrolments:

Electronic notifications are generated automatically to confirm bookings and send out joining instructions to delegates.

Once a delegate has been enrolled they will receive:

1. a booking confirmation the following day

2. a joining instruction notification X days before the class start date (depending on what number of days was set at course level).

When sending notifications, ICIS uses the following logic:

Where the employee has an IC email account, the notification will be sent to the employees IC email address.

If when the employee was enrolled, a Contact was added (e.g. their line manager), a copy notification will be sent to this Contact.

If for some reason the employee does not have an email address set up, please enter their Contact's details and the notification will be sent to them.

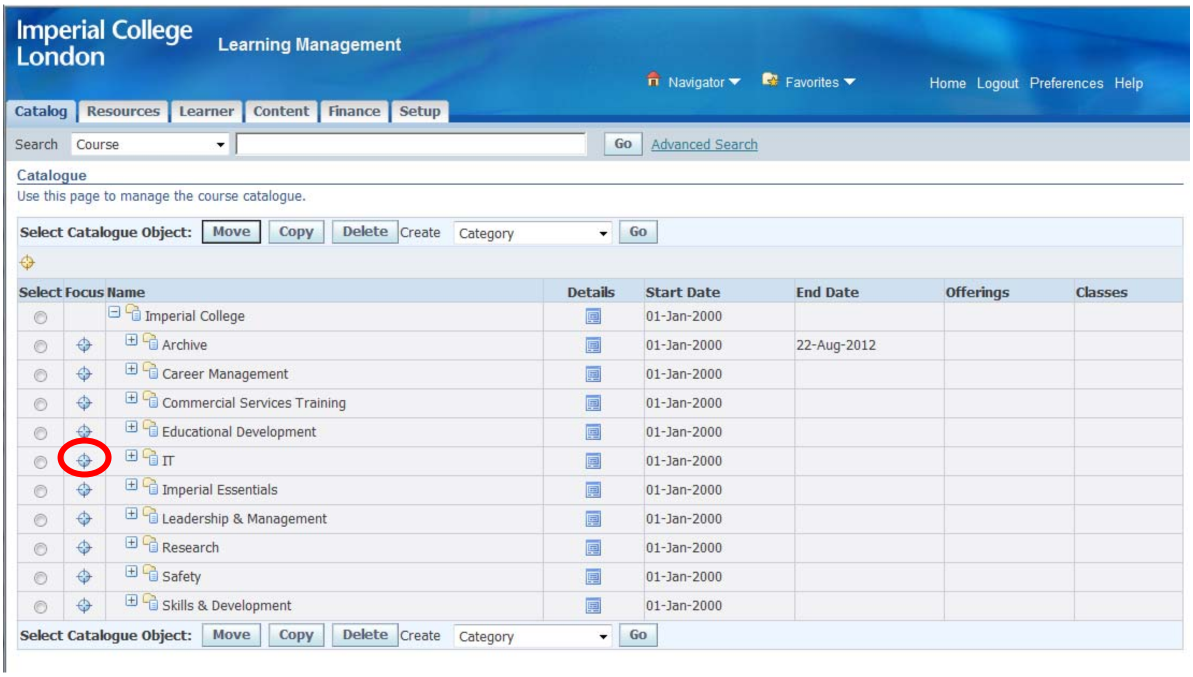
Enrolling an Internal Delegate (Via Catalogue):

Before enrolling an Internal Delegate:

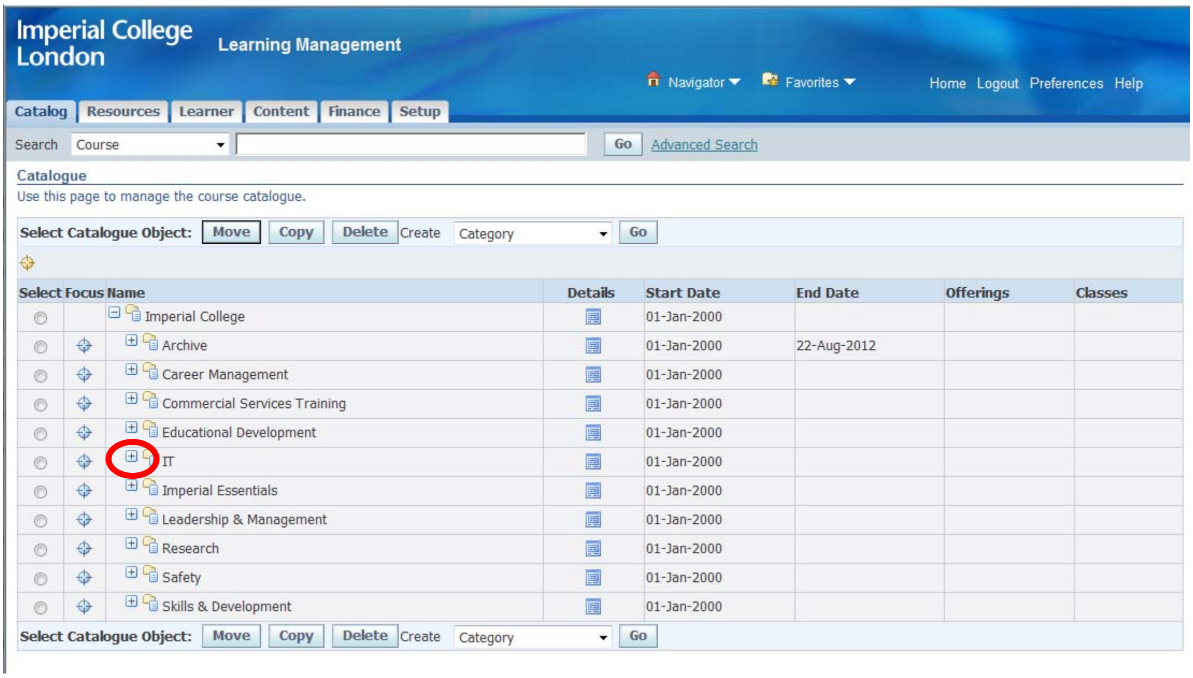
Before you enrol anyone you will need to check their booking form to see if they are an internal delegate (Imperial College staff member), external delegate (someone from outside Imperial College) or a student.

1. Either search for the class you wish to enrol someone onto via the search option at the top of the screen or by using the Focus buttons in the main catalog.

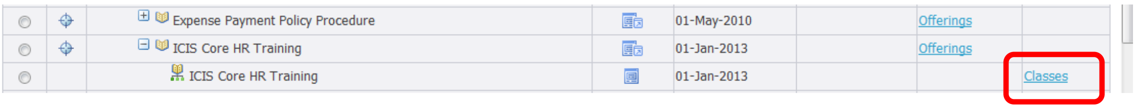
OLM GUIDANCE NOTES



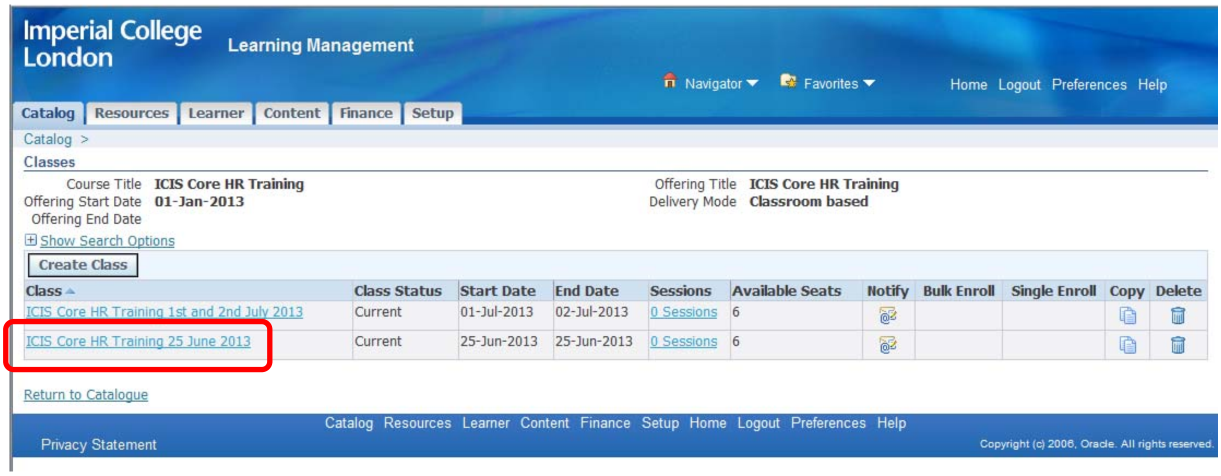
2. To view the list of courses within the category click on the expansion icon th to reveal the courses.



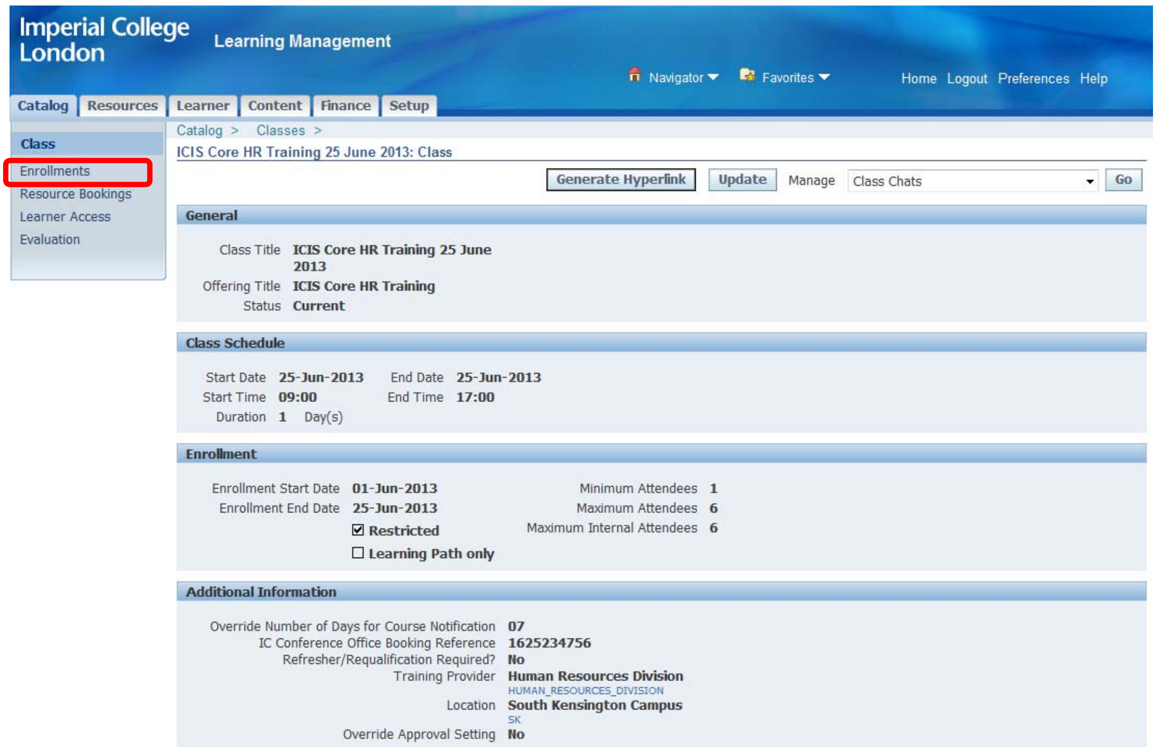
3. Focus on the course to reveal the Offerings and Classes within it. Click on **Classes**.



4. A list of each of the classes appears. Identify the particular class you are interested in and click on the title.

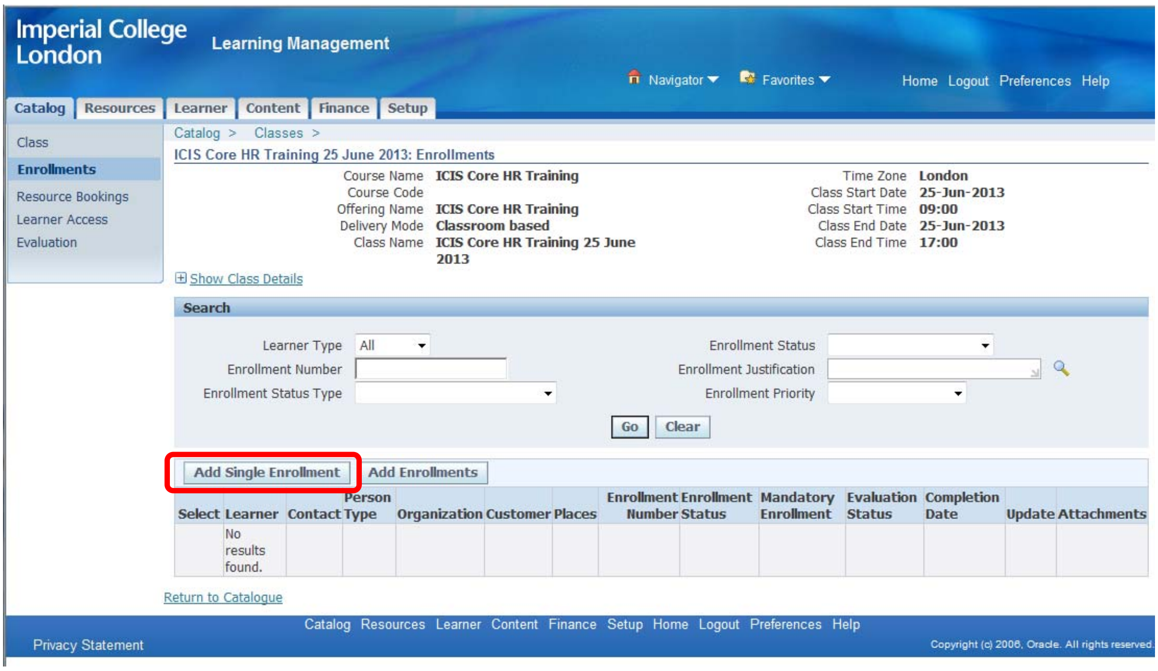


5. Select **Enrollments** from the top left hand side of the screen.

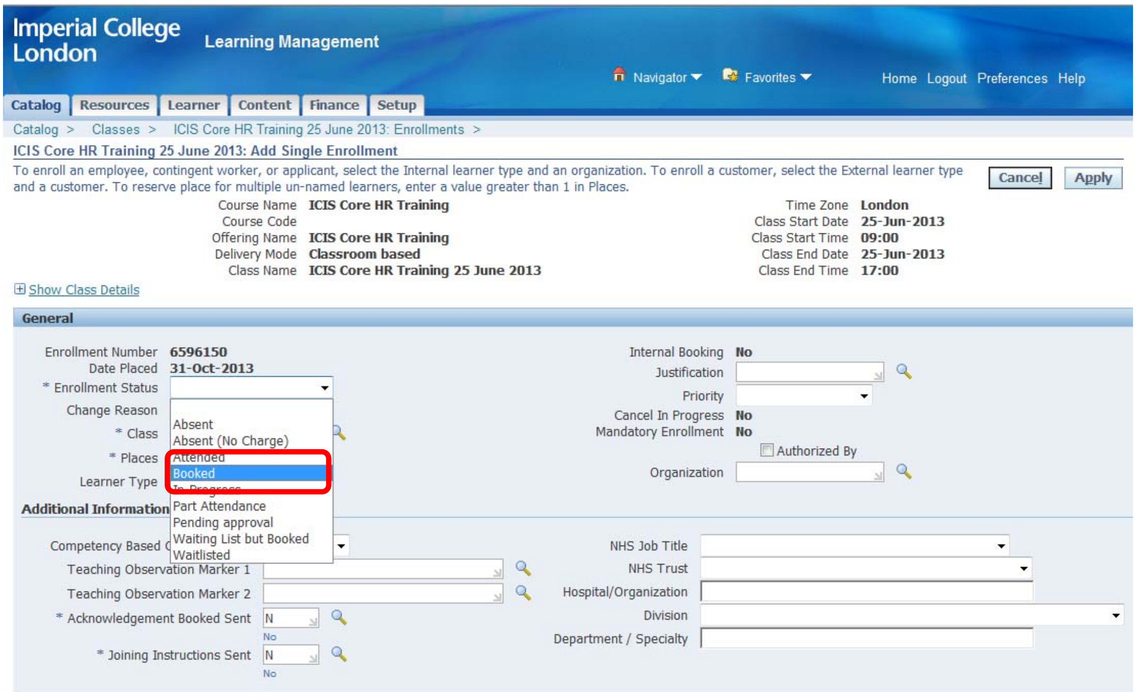


6. The **Enrollment** form is displayed. Select the **Add Single Enrolment** button.

OLM GUIDANCE NOTES



7. Click into the **Enrollment Status** field and select booked.



8. Click into the **Last Name** field in the **Learner Details** section and type in the delegate's last name. Then click on the **magnifying glass** icon.

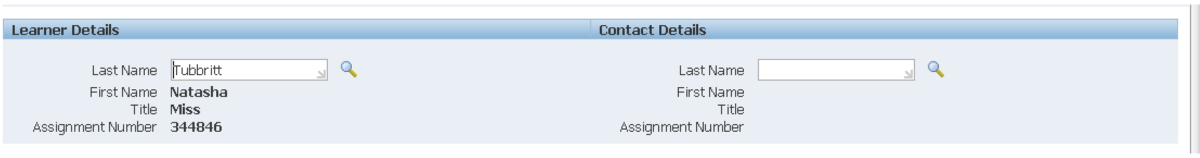
OLM GUIDANCE NOTES

A search window will display all the records that match your search. **Note:** If only one match is found this is automatically populated. Click on the **Select** button next to the delegate's name, then click **Select** at the top of the screen, or use the **Quick Select** button.

Alternatively, you can pick from the list of names that are automatically displayed when you start to enter the surname.

Note: Sometimes there may be two entries for one delegate. This is because the system has stored the applicant's details as well as the employer's details. If both are listed, please use the employer record. If only the applicant record shows, use this one.

The form will be populated with the full name and individual's assignment number.

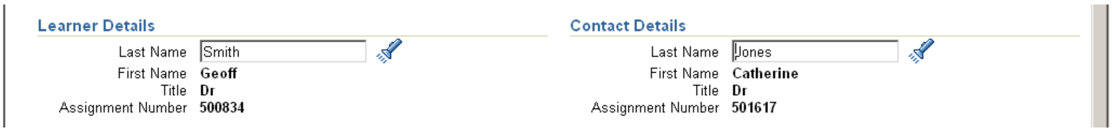


9. If required, click into the **Last Name** field in the **Contact Details** section and type in the contacts last followed by%. Then click on the **magnifying glass** icon.

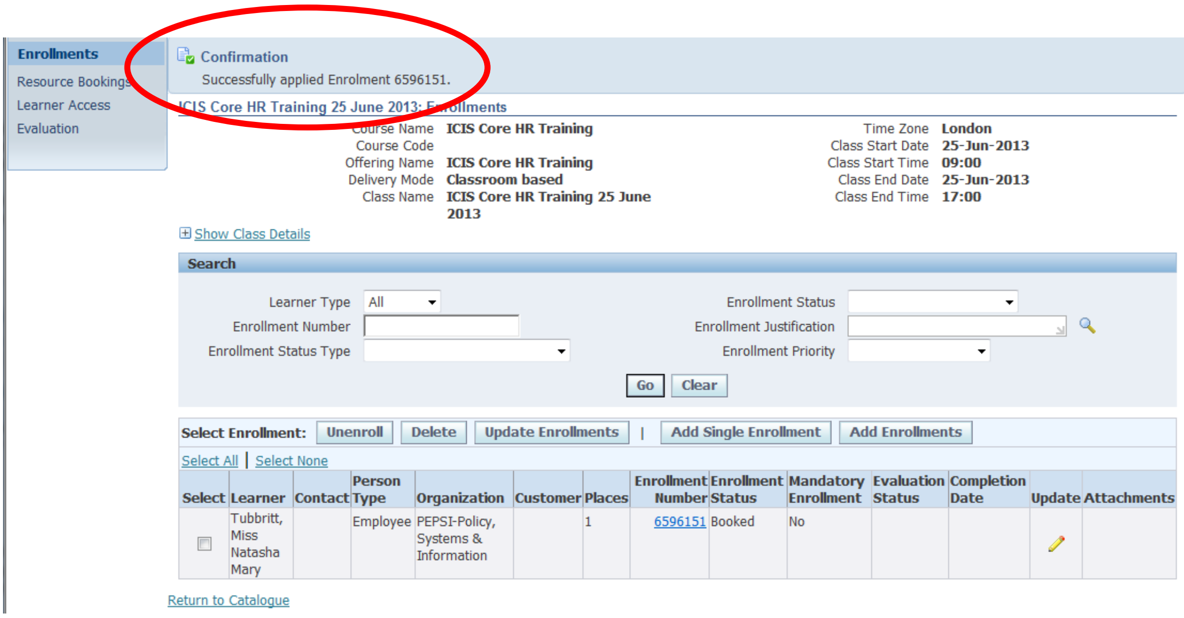
A search window will display all the records that match your search. **Note:** If only one match is found this is automatically populated. Click on the **Select** button next to the delegate's name, then click **Select** at the top of the screen, or use the **Quick Select** button.

Alternatively, you can pick from the list of names that are automatically displayed when you start to enter the surname.

OLM GUIDANCE NOTES



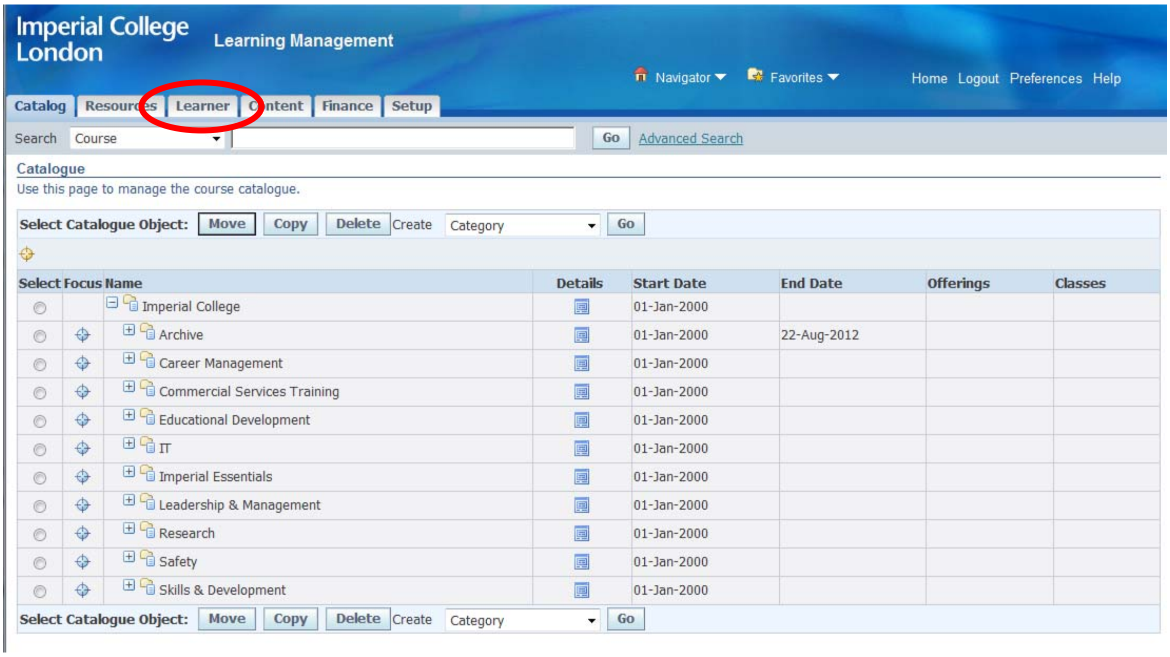
10. To save the enrolment click on the **Apply** button, located at the top and bottom of the page. A message confirming the enrolment is displayed.



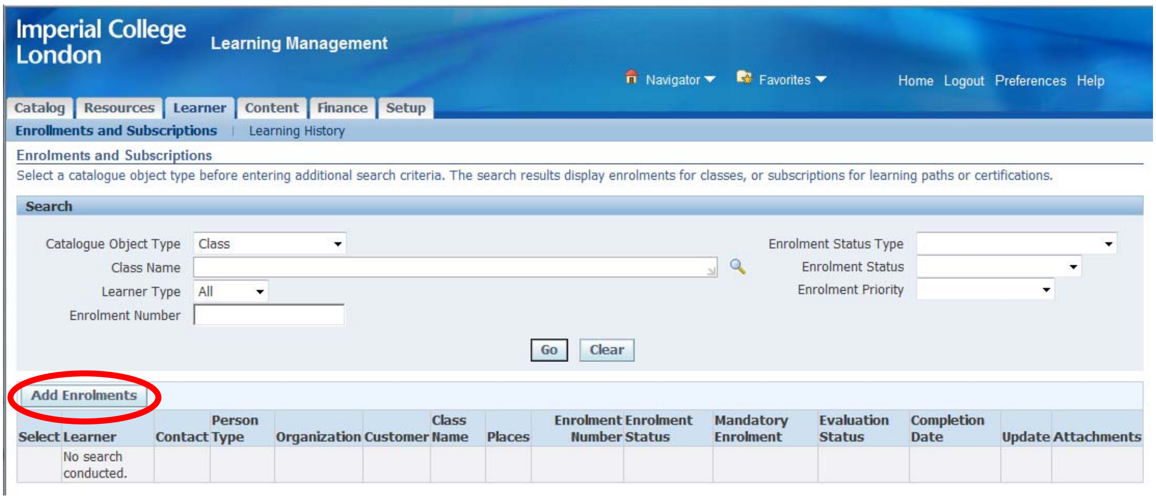
Enrolling an Internal Delegate (Via Learner Tab):

1. Click onto the Learner tab.

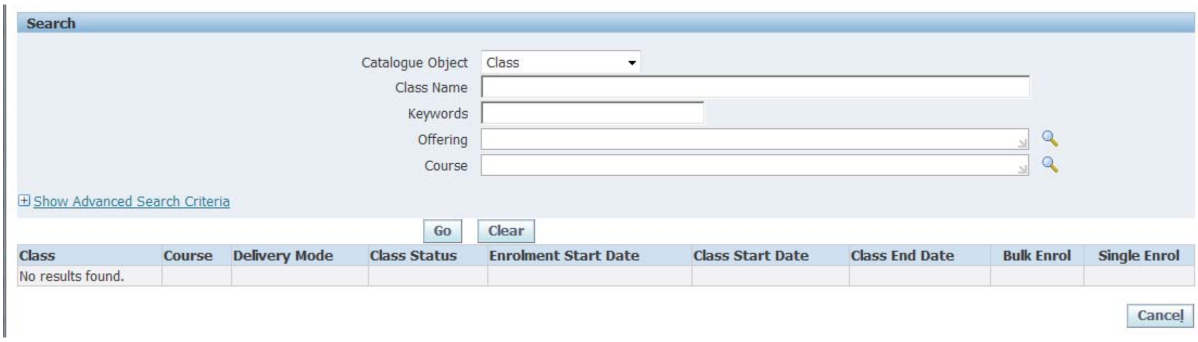
OLM GUIDANCE NOTES



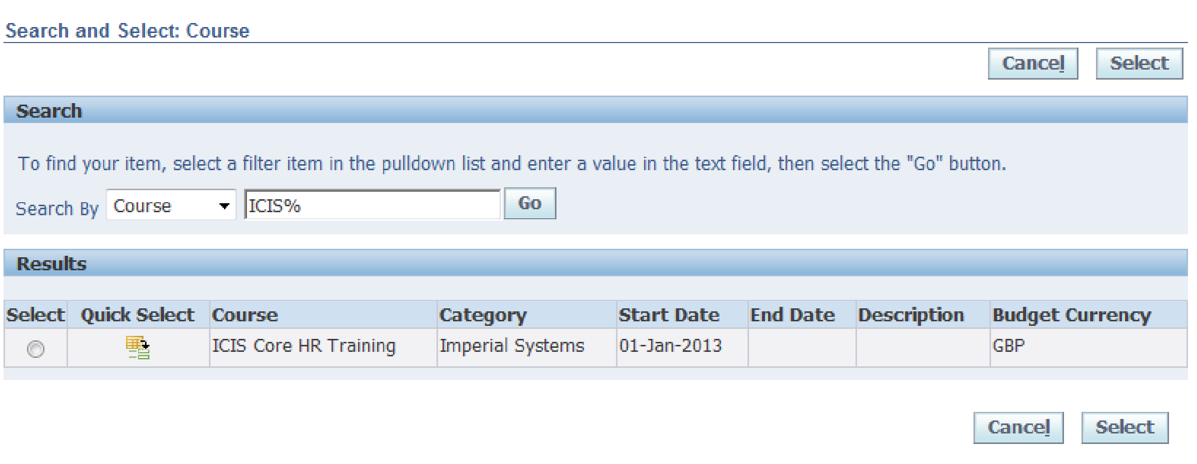
2. Click on the **Add Enrolments** button at the bottom of the page.



3. To search for the course you are interested in click into the **Course** field and type in part of the course name followed by %. Click **Go**.

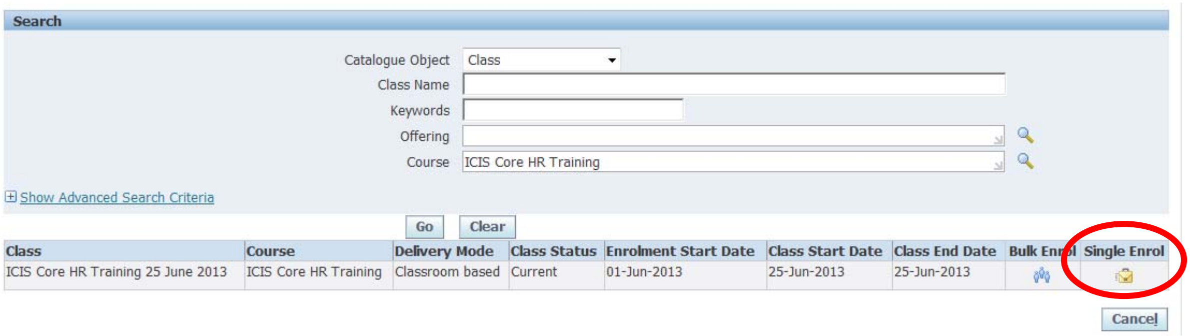


4. Select the course by clicking on the **Select** button next to the course name, then click on the **Select** or simply use the **Quick Select** button.



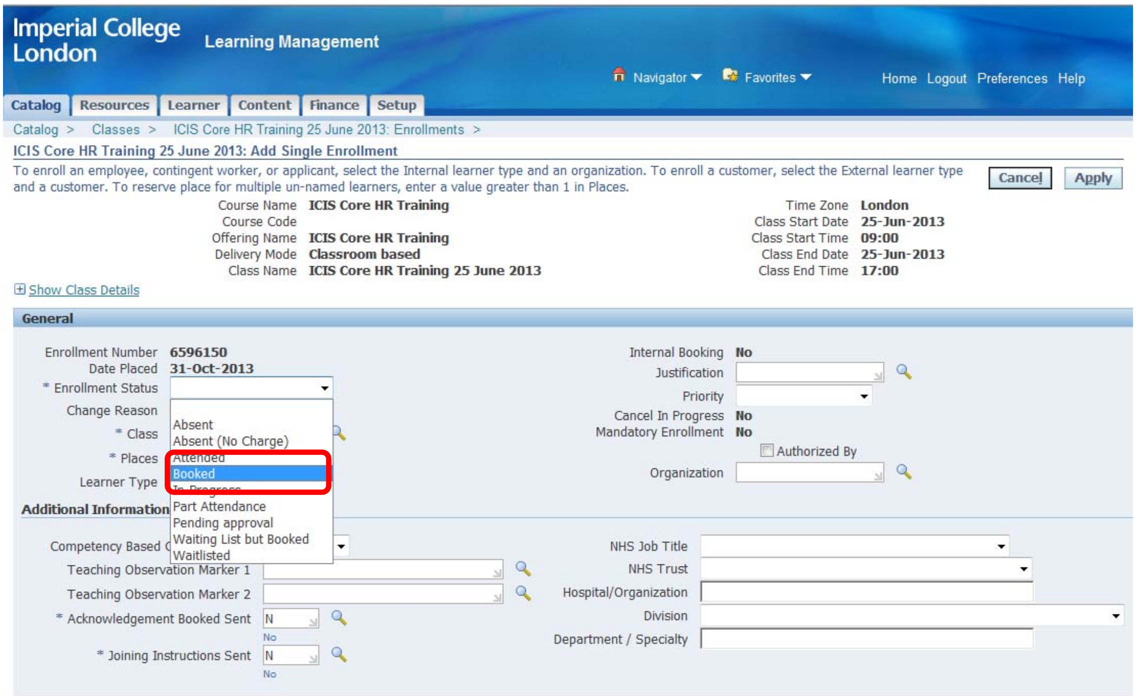
5. When returned to the main screen, you'll see the name of your course in teh Course filed. Click on **Go**.

6. A choice of classes will appear at the bottom of the screen. Click on **Single Enrol** against the relevant class.

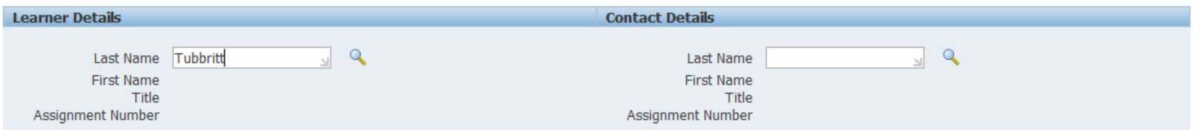


7. Click into the **Enrollment Status** field and select booked.

OLM GUIDANCE NOTES



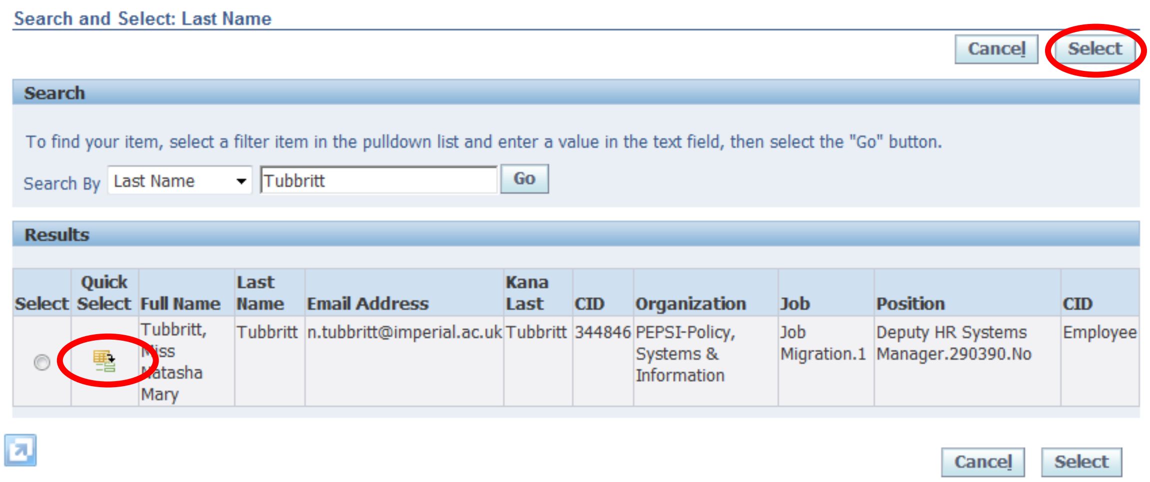
8. Click into the **Last Name** field in the **Learner Details** section and type in the delegate's last name. Then click on the **magnifying glass** icon.



A search window will display all the records that match your search. **Note:** If only one match is found this is automatically populated. Click on the **Select** button next to the delegate's name, then click **Select** at the top of the screen, or use the **Quick Select** button.

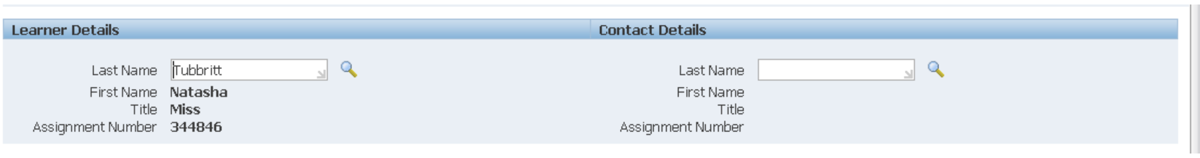
Alternatively, you can pick from the list of names that are automatically displayed when you start to enter the surname.

OLM GUIDANCE NOTES



Note: Sometimes there may be two entries for one delegate. This is because the system has stored the applicant's details as well as the employer's details. If both are listed, please use the employer record. If only the applicant record shows, use this one.

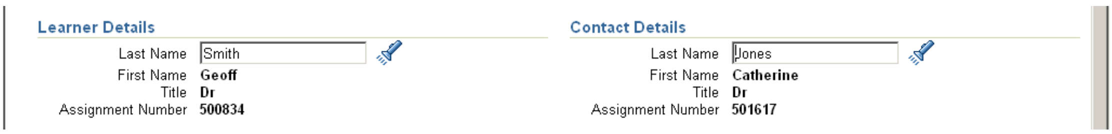
The form will be populated with the full name and individual's assignment number.



9. If required, click into the **Last Name** field in the **Contact Details** section and type in the contacts last followed by%. Then click on the **magnifying glass** icon.

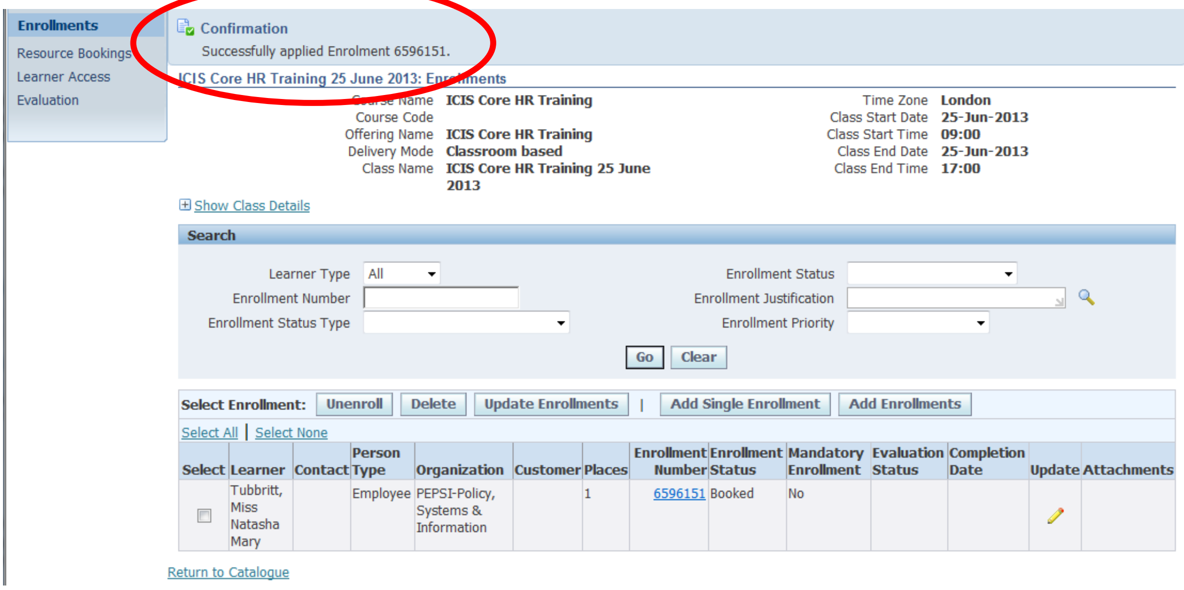
A search window will display all the records that match your search. **Note:** If only one match is found this is automatically populated. Click on the **Select** button next to the delegate's name, then click **Select** at the top of the screen, or use the **Quick Select** button.

Alternatively, you can pick from the list of names that are automatically displayed when you start to enter the surname.



10. To save the enrolment click on the **Apply** button, located at the top and bottom of the page. A message confirming the enrolment is displayed.

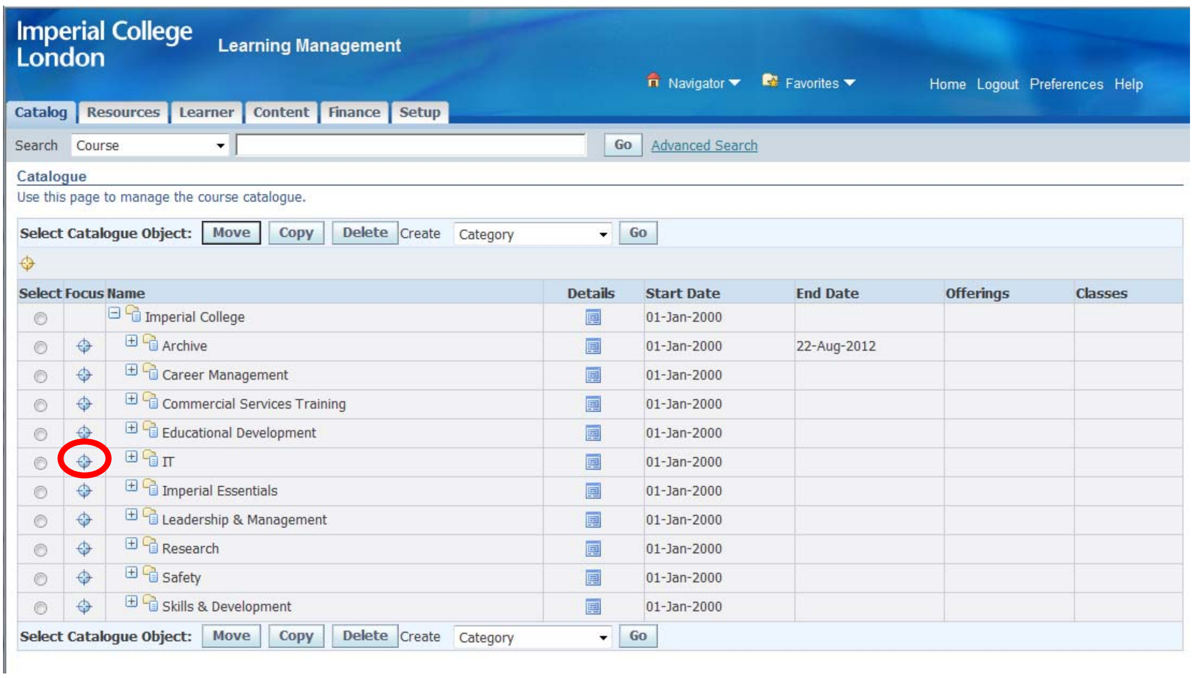
OLM GUIDANCE NOTES



Enrol an External Delegate (Via Catalogue):

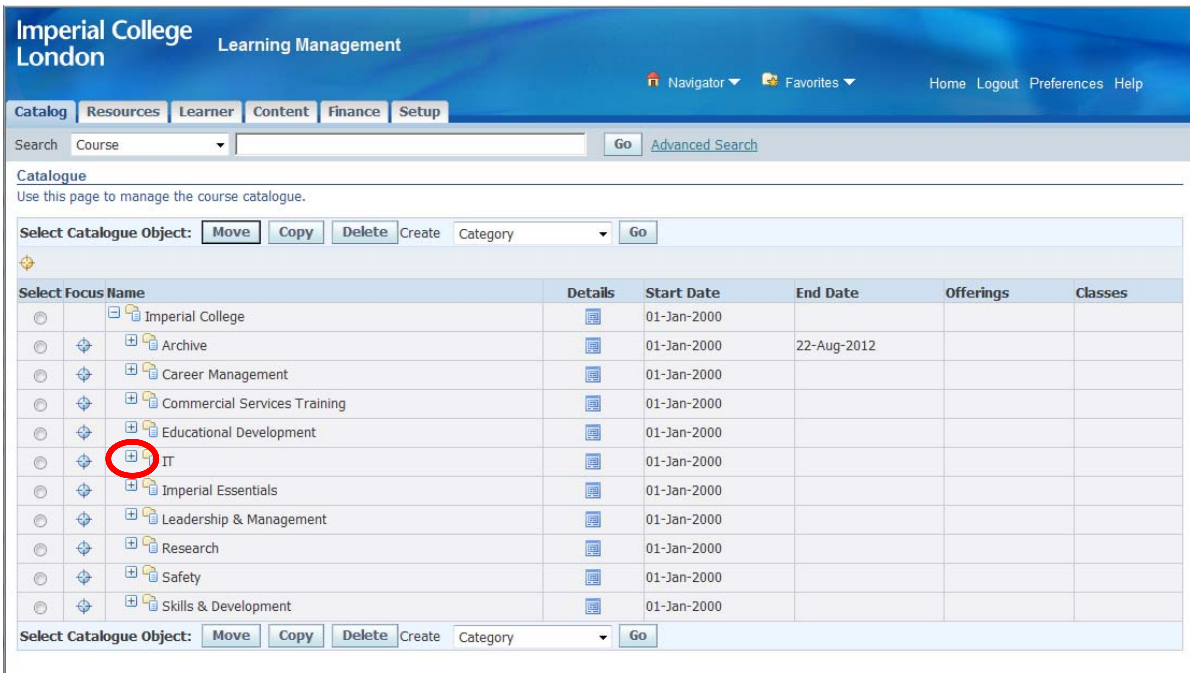
Before following the steps below, please ensure that the person you wish to enroll is an external i.e. no staff or a undergraduate/[postgraduate student (not set up in Core HR as a Bursary).

1. Either search for the class you wish to enrol someone onto via the search option at the top of the screen or by using the Focus buttons in the main catalog.

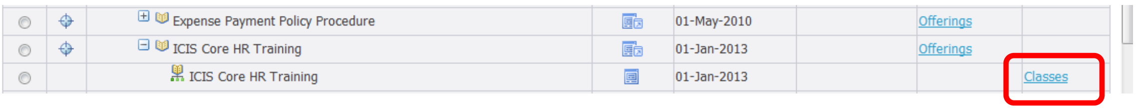


OLM GUIDANCE NOTES

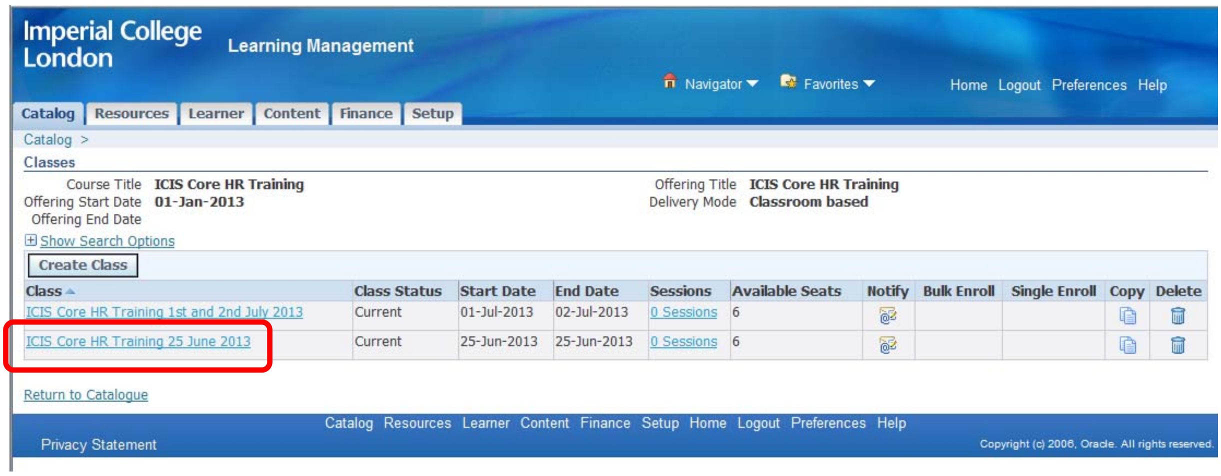
2. To view the list of courses within the category click on the expansion icon th to reveal the courses.



3. Focus on the course to reveal the Offerings and Classes within it. Click on **Classes**.

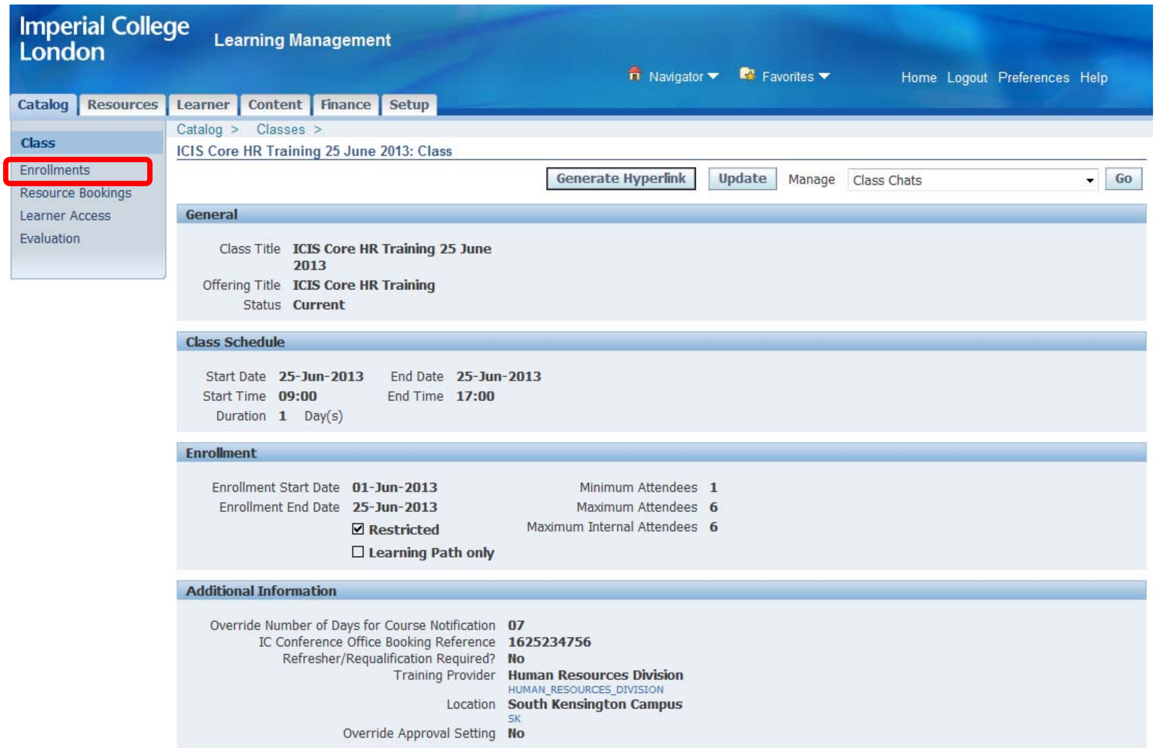


4. A list of each of the classes appears. Identify the particular class you are interested in and click on the title.

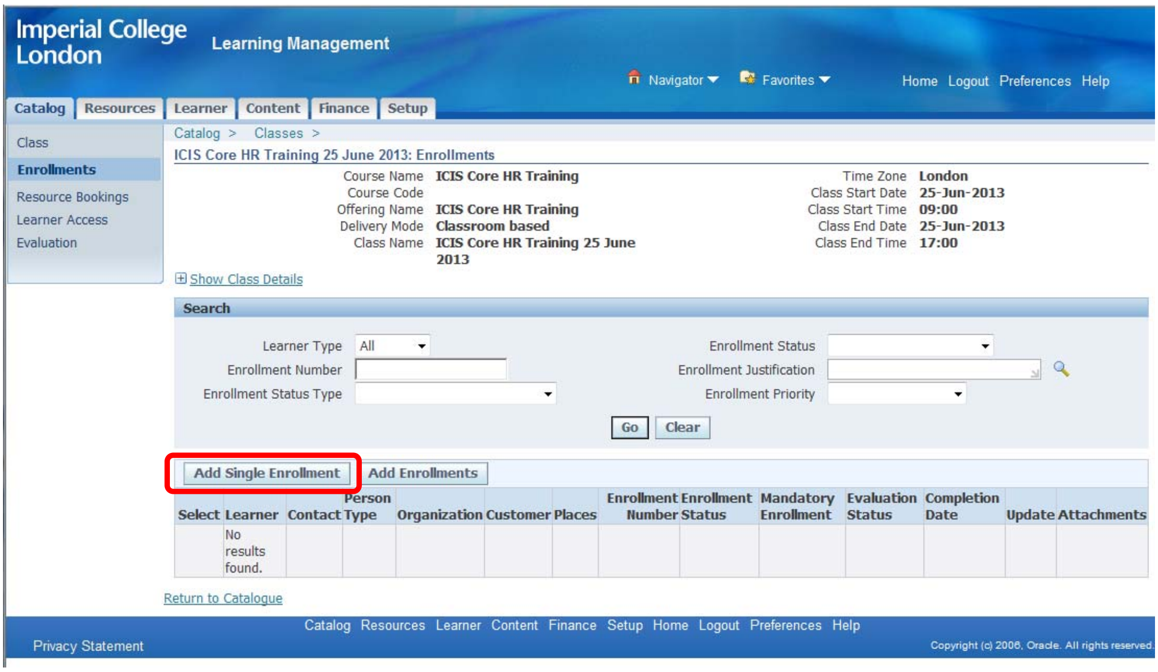


OLM GUIDANCE NOTES

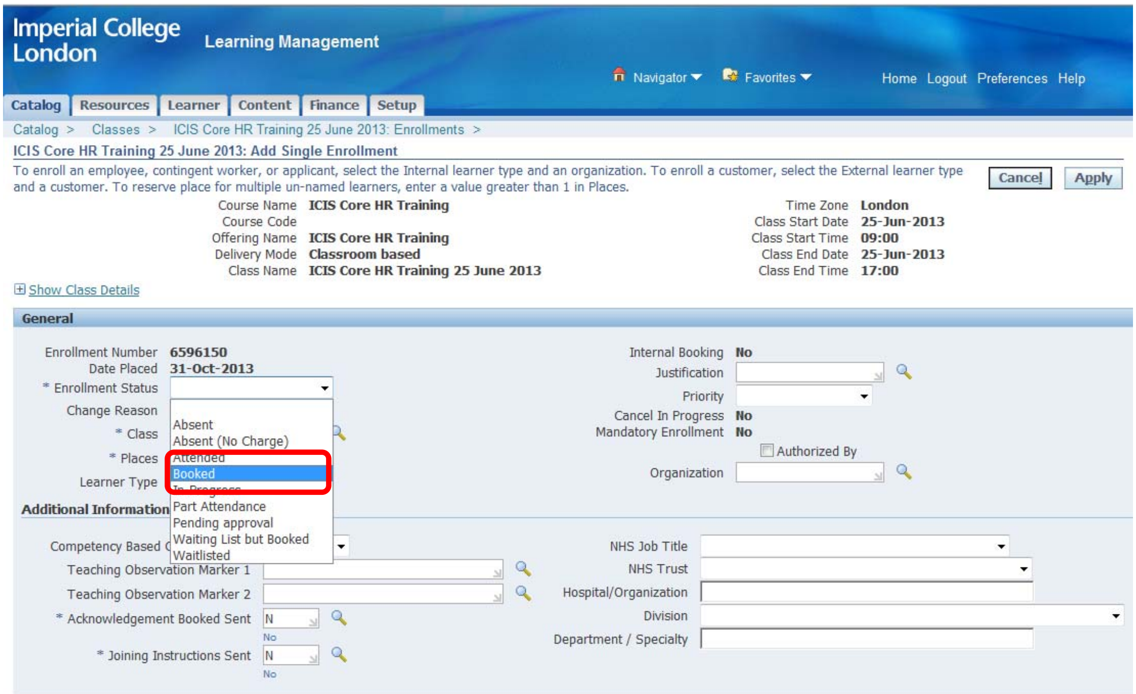
5. Select **Enrollments** from the top left hand side of the screen.



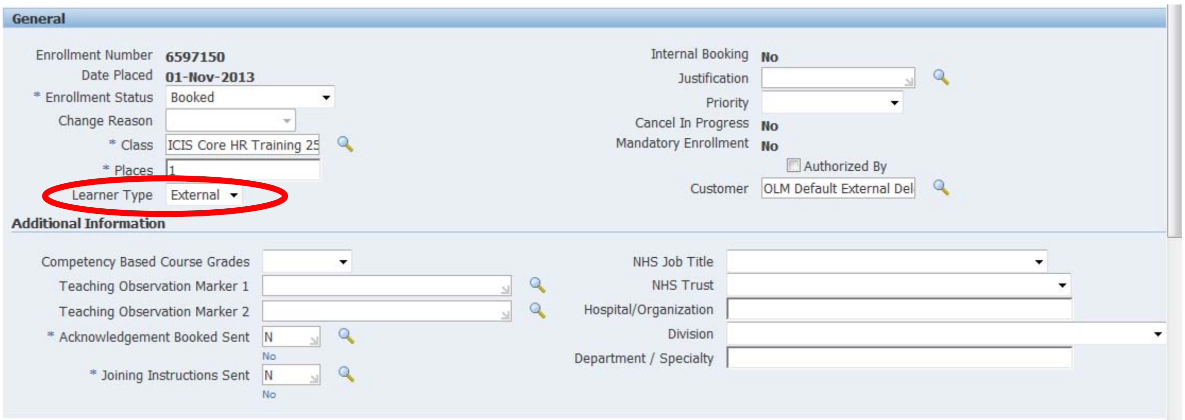
6. The **Enrollment** form is displayed. Select the **Add Single Enrolment** button.



7. Click into the **Enrollment Status** field and select booked.



8. Select **External** in the **Learner Type** field.

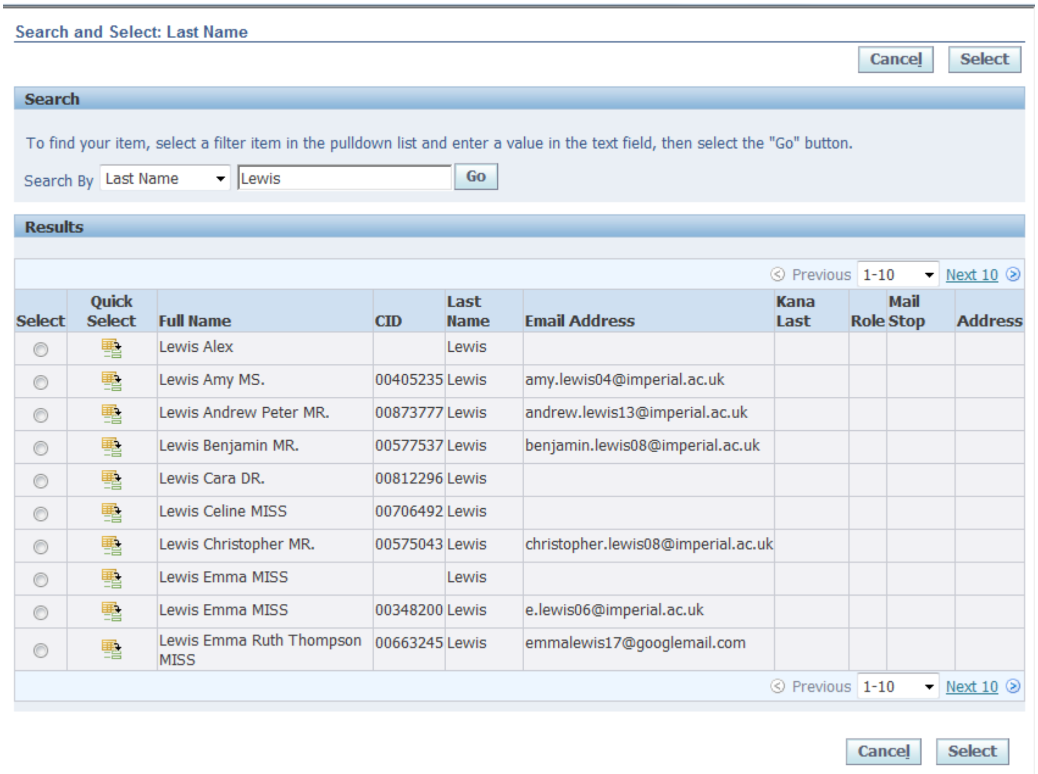


9. Now go to the **Learner Details** section to search for your external delegate or enter the details of the external delegate if they do not already exist.

10. To search for your external delegate, enter the delegate's last name into the **Last Name** field and search. A record may have already been created for them.

Alternatively, you can pick from the list of names that are automatically displayed when you start to enter the surname.

OLM GUIDANCE NOTES


Search and Select: Last Name

Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Last Name Lewis Go

Results

Previous 1-10 Next 10

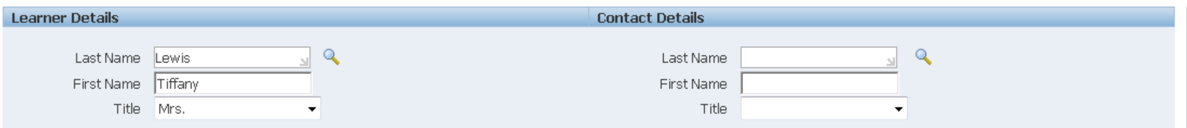
Select	Quick Select	Full Name	CID	Last Name	Email Address	Kana Last	Role	Mail Stop	Address
		Lewis Alex		Lewis					
		Lewis Amy MS.	00405235	Lewis	amy.lewis04@imperial.ac.uk				
		Lewis Andrew Peter MR.	00873777	Lewis	andrew.lewis13@imperial.ac.uk				
		Lewis Benjamin MR.	00577537	Lewis	benjamin.lewis08@imperial.ac.uk				
		Lewis Cara DR.	00812296	Lewis					
		Lewis Celine MISS	00706492	Lewis					
		Lewis Christopher MR.	00575043	Lewis	christopher.lewis08@imperial.ac.uk				
		Lewis Emma MISS		Lewis					
		Lewis Emma MISS	00348200	Lewis	e.lewis06@imperial.ac.uk				
		Lewis Emma Ruth Thompson MISS	00663245	Lewis	emmalewis17@googlemail.com				

Previous 1-10 Next 10

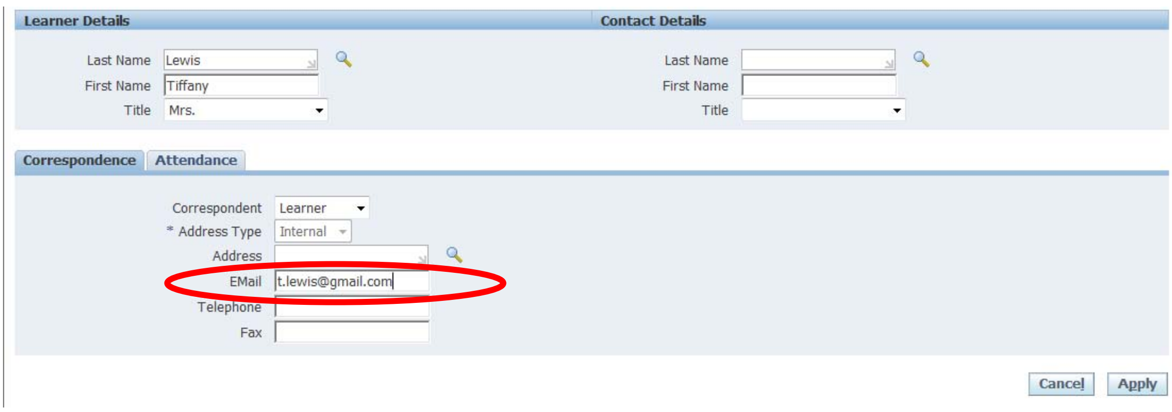
Cancel Select

Please note: The external delegate records will not have stored any email addresses. The email address will always need to be re-entered when enrolling.

11. If the external delegate does not appear you will have to create your own record. Fill in the name of the external delegate as below:



12. Enter **Learner** in the **Correspondent** field. Type the delegate's email address into the email field.

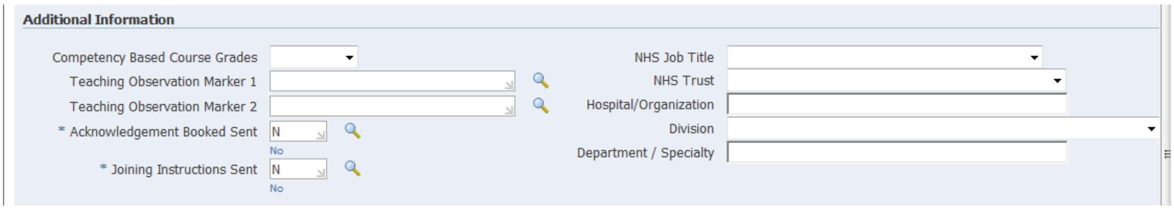


OLM GUIDANCE NOTES

Please note: It is crucial that you enter a contact email address; otherwise the delegate will not receive any notifications. It is also important to note that once you have entered this email address, it will not appear again, when you update their enrolment. However, notifications will still fire even when the email address is not visible.

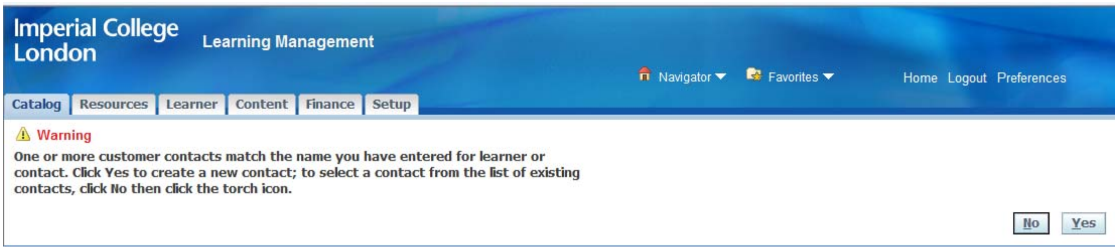
You cannot add a contact with an external enrolment.

If relevant for your team, enter details into the Additional Information fields in the middle of the form.



14. Click on **Apply** when you have finished.

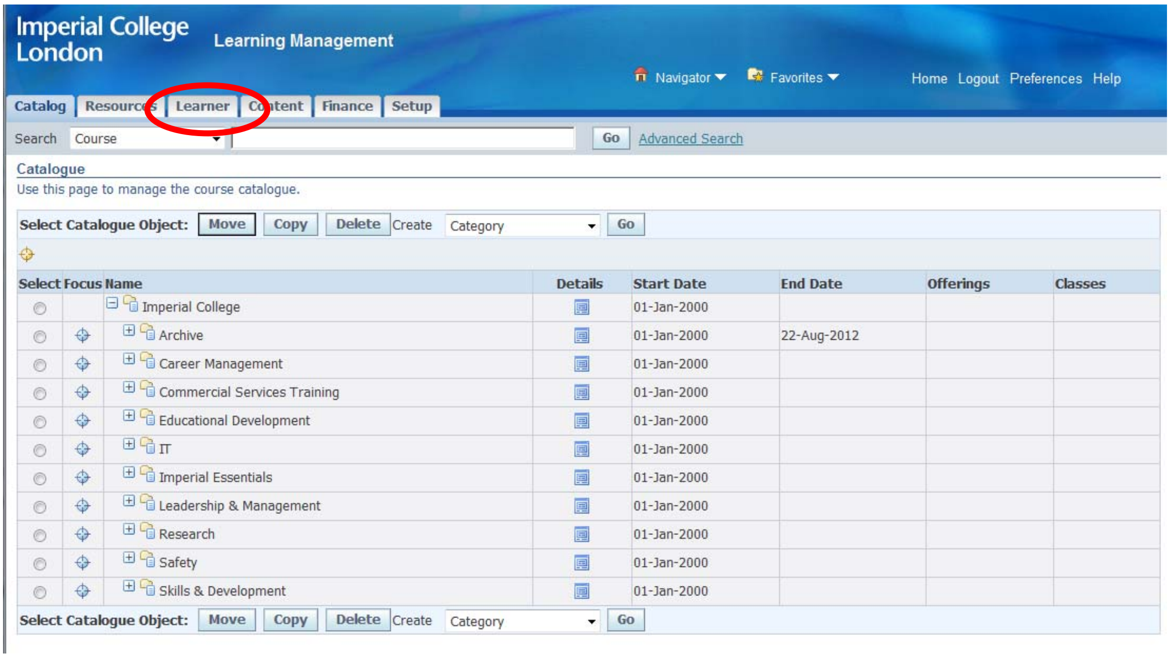
15. You may get a warning message as follows. Select 'Yes'. You will then see your external delegate in the list of enrolments.



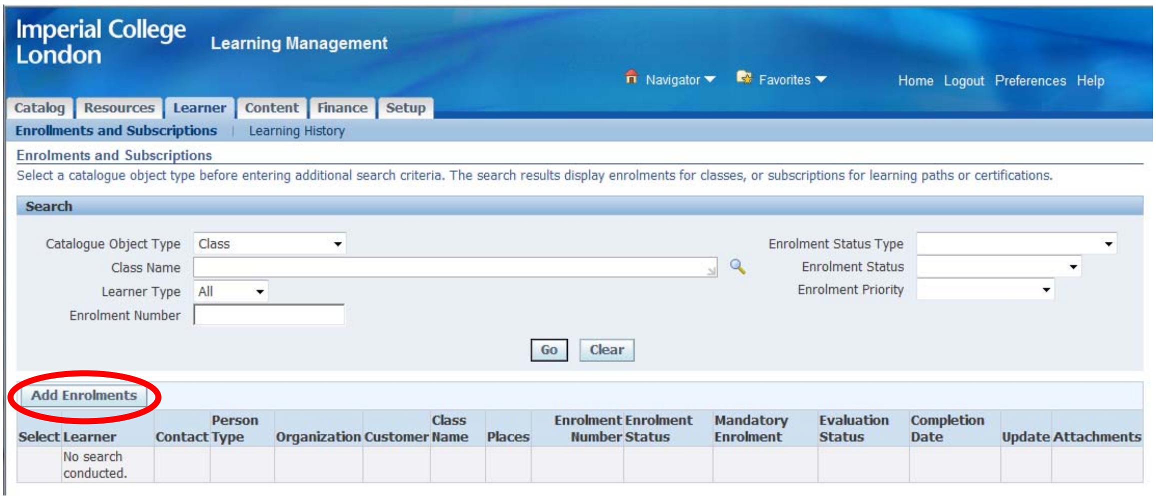
Enrol an External Delegate (Via Learner Tab):

Before following the steps below, please ensure that the person you wish to enroll is an external i.e. no staff or a undergraduate/[postgraduate student (not set up in Core HR as a Bursary).

1. Click onto the Learner tab.

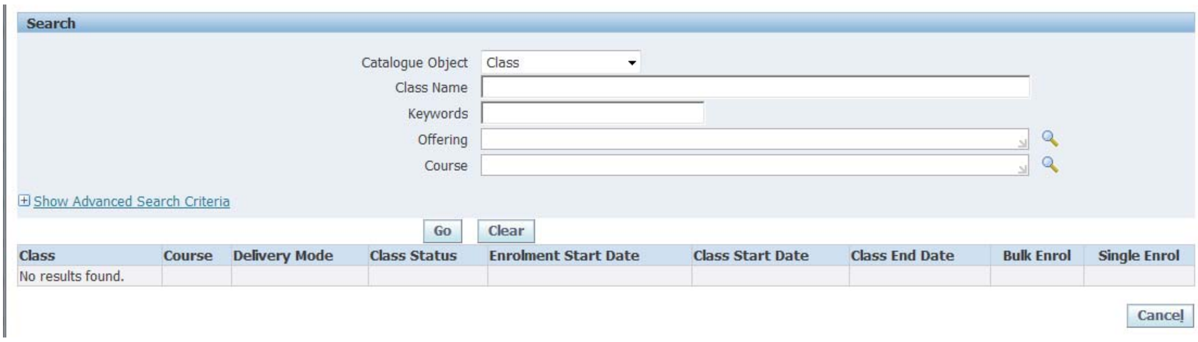


2. Click on the **Add Enrolments** button at the bottom of the page.

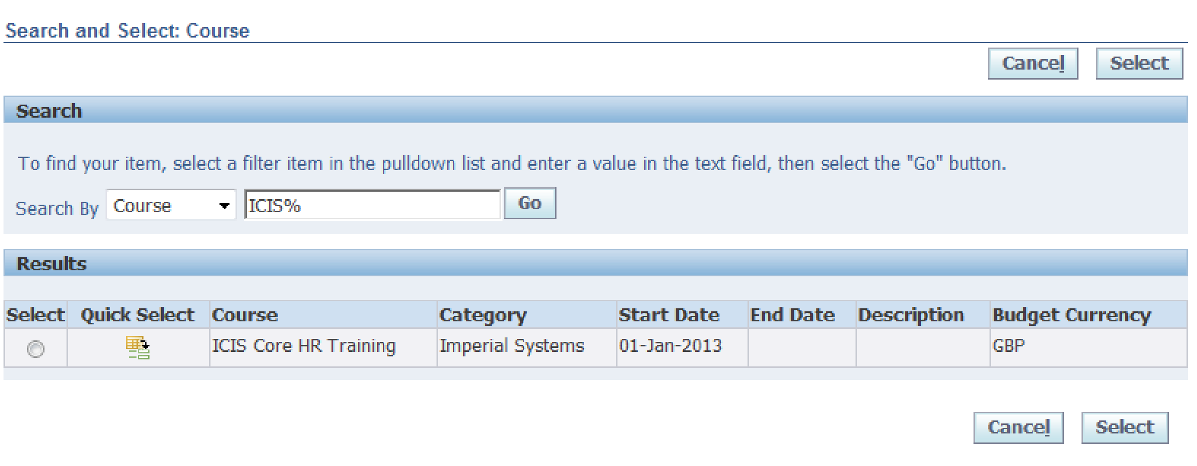


3. To search for the course you are interested in click into the **Course** field and type in part of the course name followed by %. Click **Go**.

OLM GUIDANCE NOTES

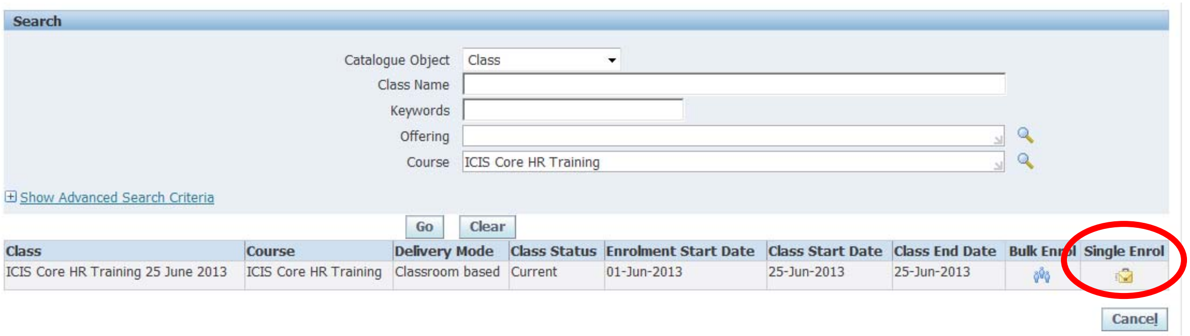


4. Select the course by clicking on the **Select** button next to the course name, then click on the **Select** or simply use the **Quick Select** button.



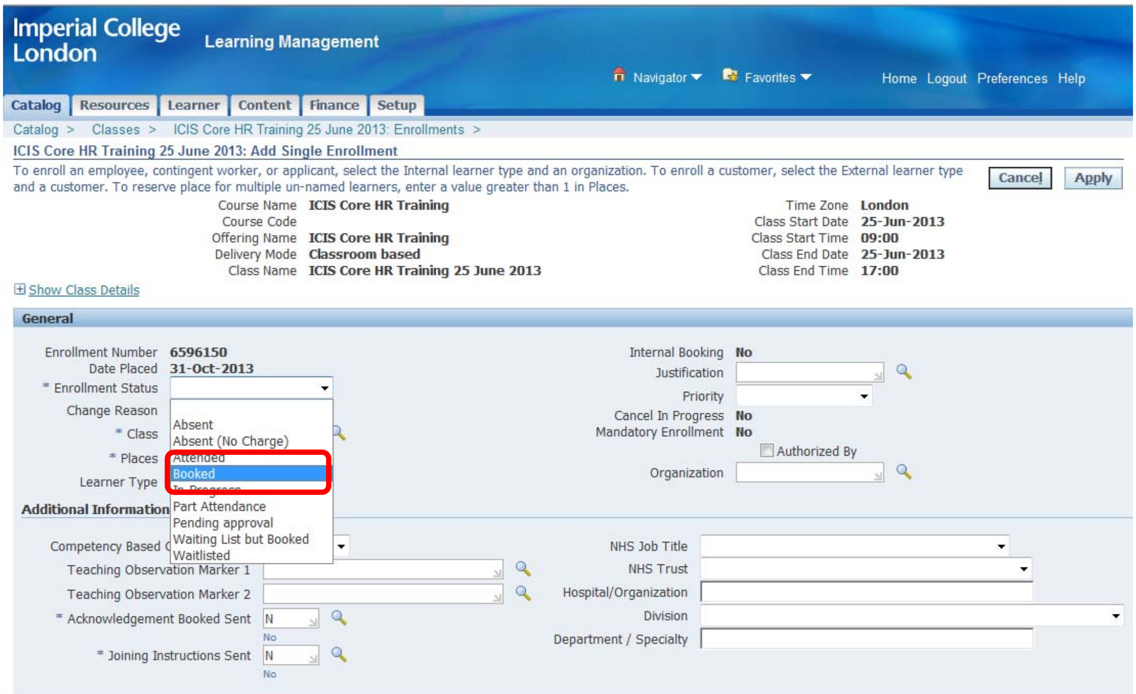
5. When returned to the main screen, you'll see the name of your course in teh Course filed. Click on **Go**.

6. A choice of classes will appear at the bottom of the screen. Click on **Single Enrol** against the relevant class.

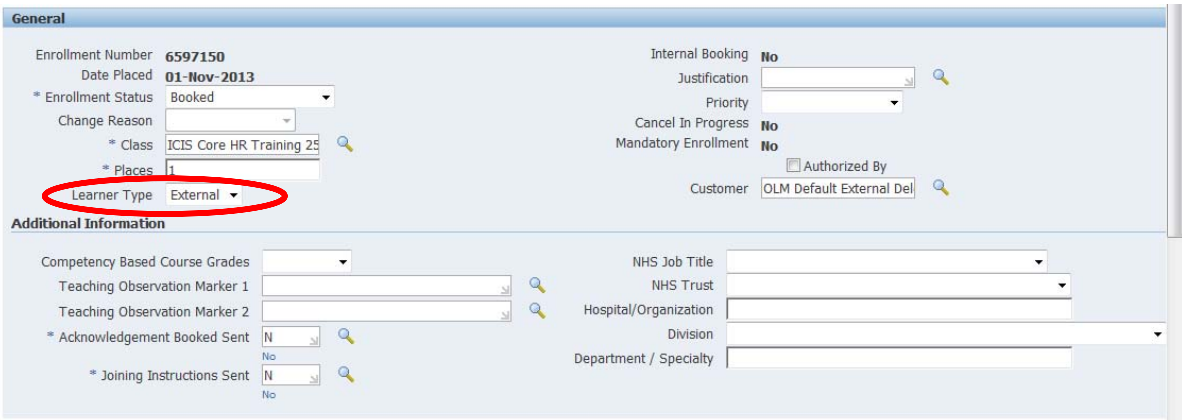


7. Click into the **Enrollment Status** field and select booked.

OLM GUIDANCE NOTES



1. Select **External** in the **Learner Type** field.

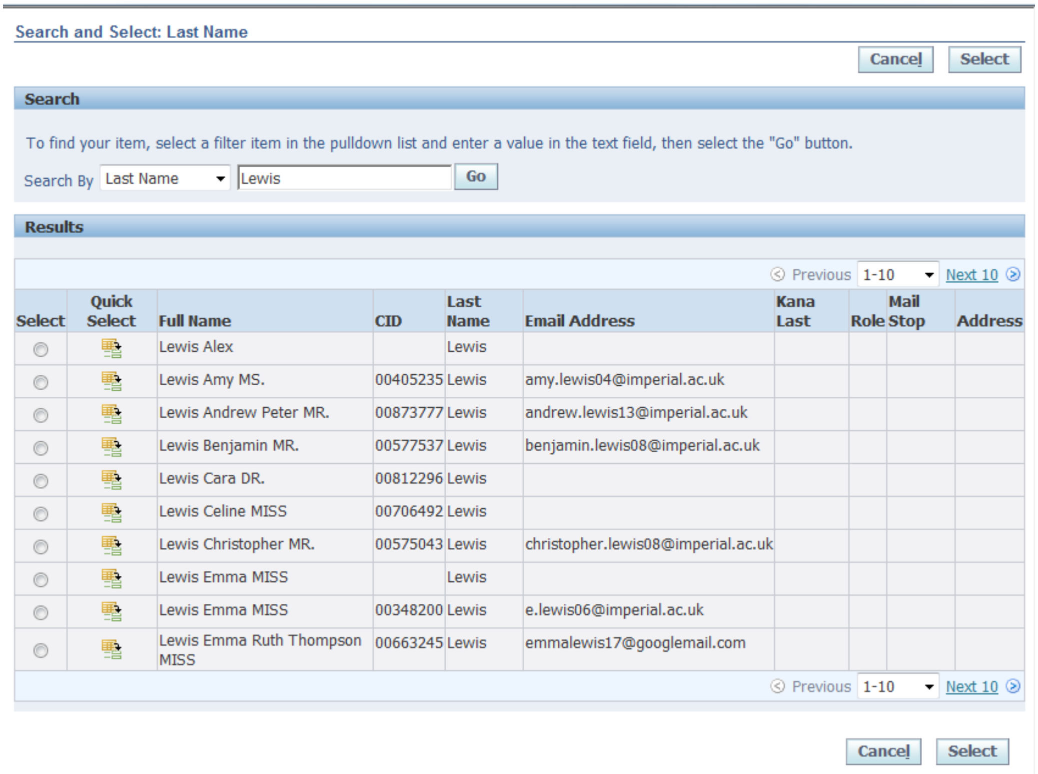


2. Now go to the **Learner Details** section to search for your external delegate or enter the details of the external delegate if they do not already exist.

3. To search for your external delegate, enter the delegate's last name into the **Last Name** field and search. A record may have already been created for them.

Alternatively, you can pick from the list of names that are automatically displayed when you start to enter the surname.

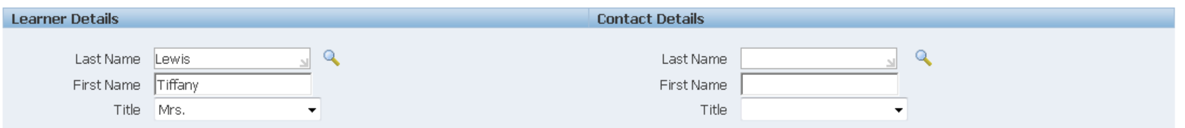
OLM GUIDANCE NOTES



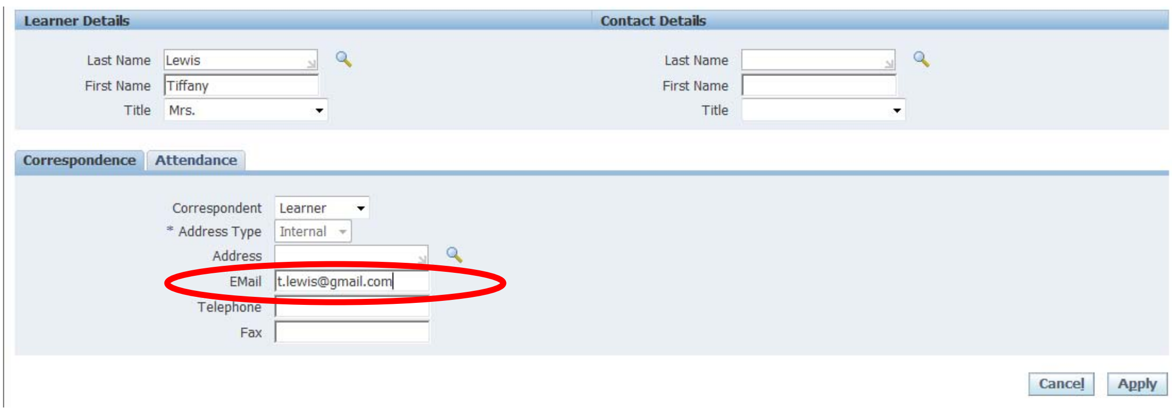
Select	Quick Select	Full Name	CID	Last Name	Email Address	Kana Last	Role	Mail Stop	Address
		Lewis Alex		Lewis					
		Lewis Amy MS.	00405235	Lewis	amy.lewis04@imperial.ac.uk				
		Lewis Andrew Peter MR.	00873777	Lewis	andrew.lewis13@imperial.ac.uk				
		Lewis Benjamin MR.	00577537	Lewis	benjamin.lewis08@imperial.ac.uk				
		Lewis Cara DR.	00812296	Lewis					
		Lewis Celine MISS	00706492	Lewis					
		Lewis Christopher MR.	00575043	Lewis	christopher.lewis08@imperial.ac.uk				
		Lewis Emma MISS		Lewis					
		Lewis Emma MISS	00348200	Lewis	e.lewis06@imperial.ac.uk				
		Lewis Emma Ruth Thompson MISS	00663245	Lewis	emmalewis17@googlemail.com				

Please note: The external delegate records will not have stored any email addresses. The email address will always need to be re-entered when enrolling.

4. If the external delegate does not appear you will have to create your own record. Fill in the name of the external delegate as below:



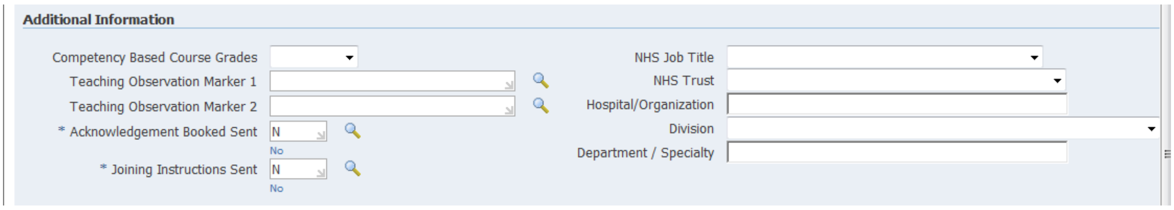
5. Enter **Learner** in the **Correspondent** field. Type the delegate's email address into the email field.



Please note: It is crucial that you enter a contact email address; otherwise the delegate will not receive any notifications. It is also important to note that once you have entered this email address, it will not appear again, when you update their enrolment. However, notifications will still fire even when the email address is not visible.

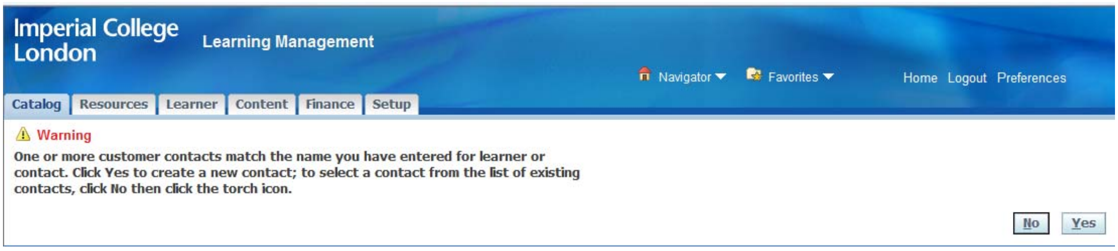
You cannot add a contact with an external enrolment.

If relevant for your team, enter details into the Additional Information fields in the middle of the form.



14. Click on **Apply** when you have finished.

15. You may get a warning message as follows. Select 'Yes'. You will then see your external delegate in the list of enrolments.



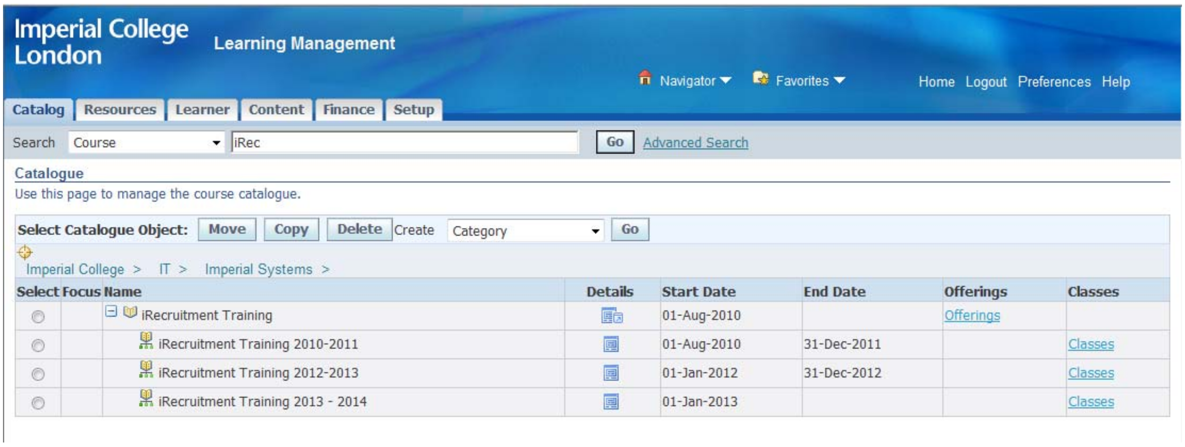
Managing & Closing Classes:

Rescheduling a Class:

You must bear in mind the following when reschedule a Class:

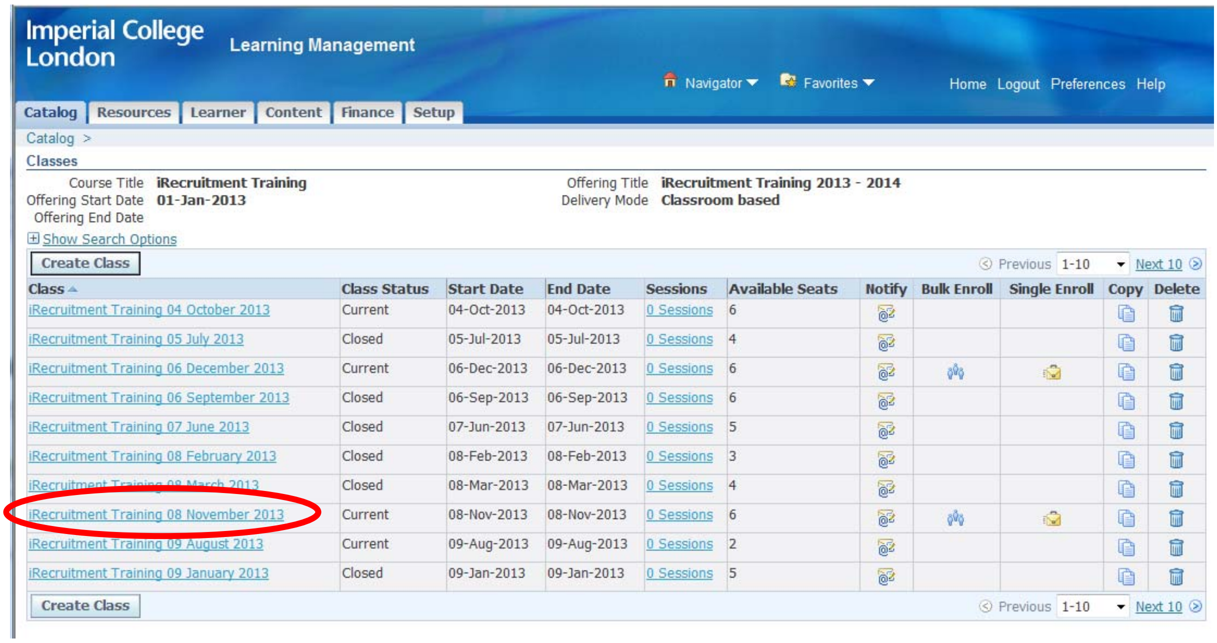
- Check if the Class has any sessions and update them if necessary.
- Check if the Class has any resource booked against it and update them if necessary.
- Send out a notification to inform delegates of the re scheduled date/changes to venue etc.

1. Search for the class you wish to reschedule.

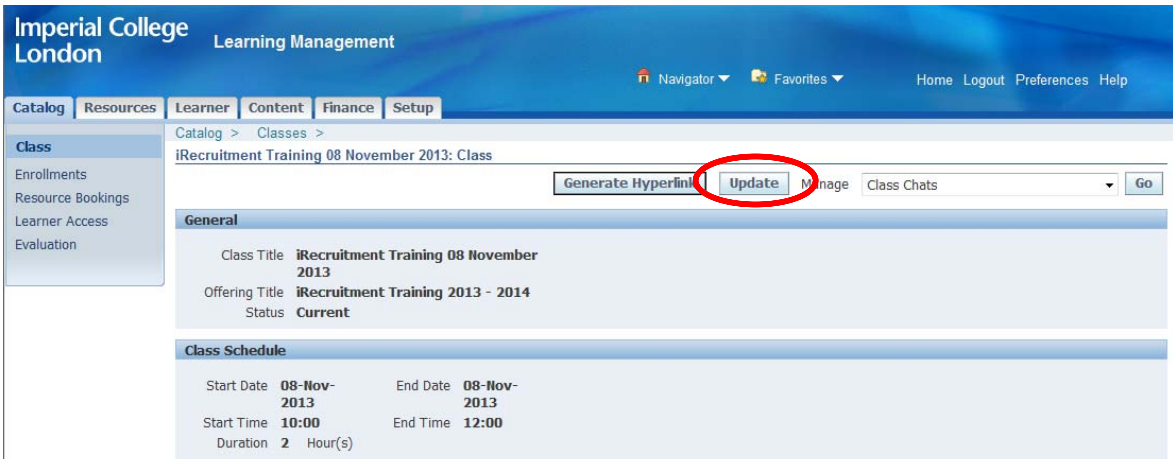


2. Select the class you wish to reschedule.

OLM GUIDANCE NOTES

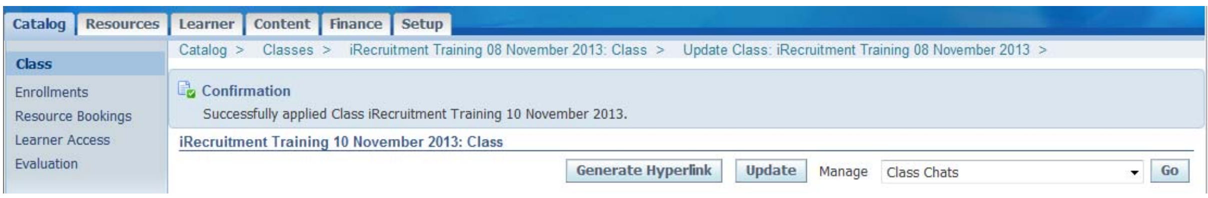


3. Click on the **Update** button at the top of the screen.



You will then be able to update class dates, start and end times etc. Click on **Apply** at bottom of screen.

A confirmation note will display, as below:



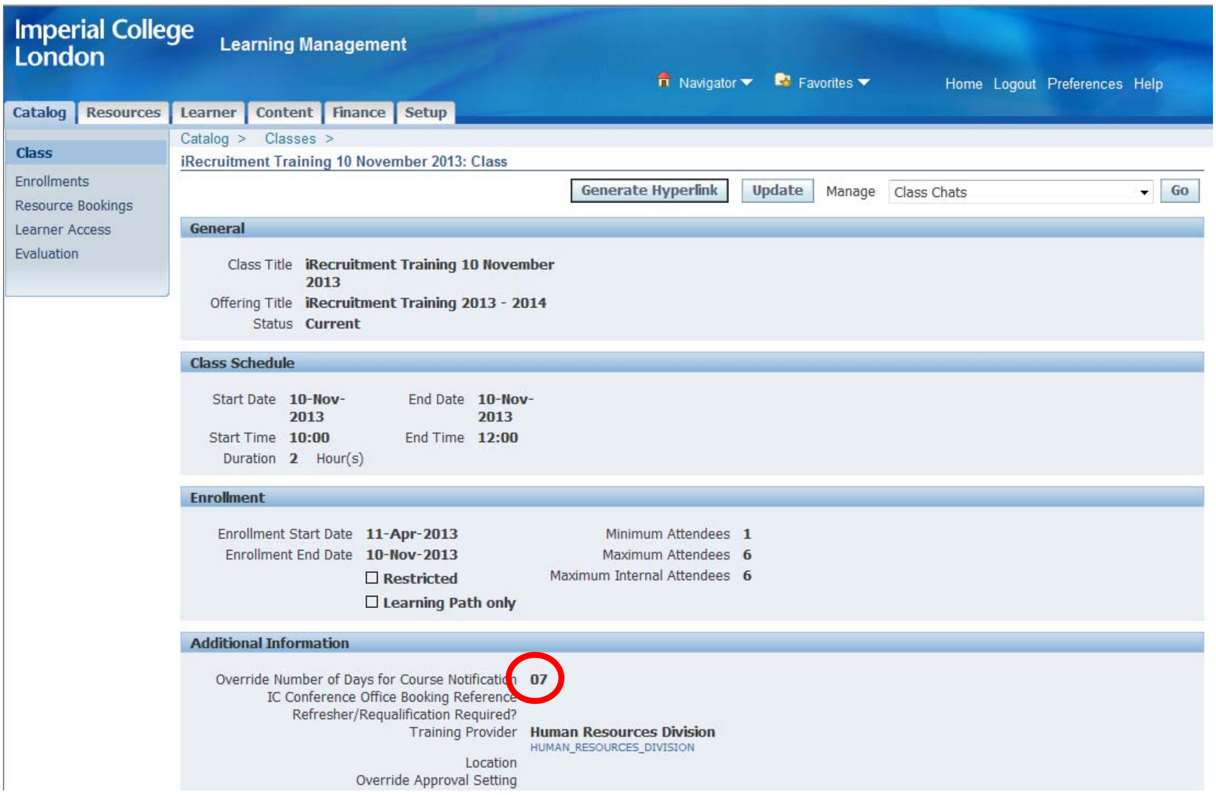
OLM GUIDANCE NOTES

Sending Notifications to Inform Delegates of Changes:

You will need to check the **Number of Days for Course Notifications**, to see if delegates have already received their joining instructions. If they have already received them, notify them of the changes to the class by normal email. Alternatively, you can adjust the enrolments of each delegate individually to fire off the notifications again.

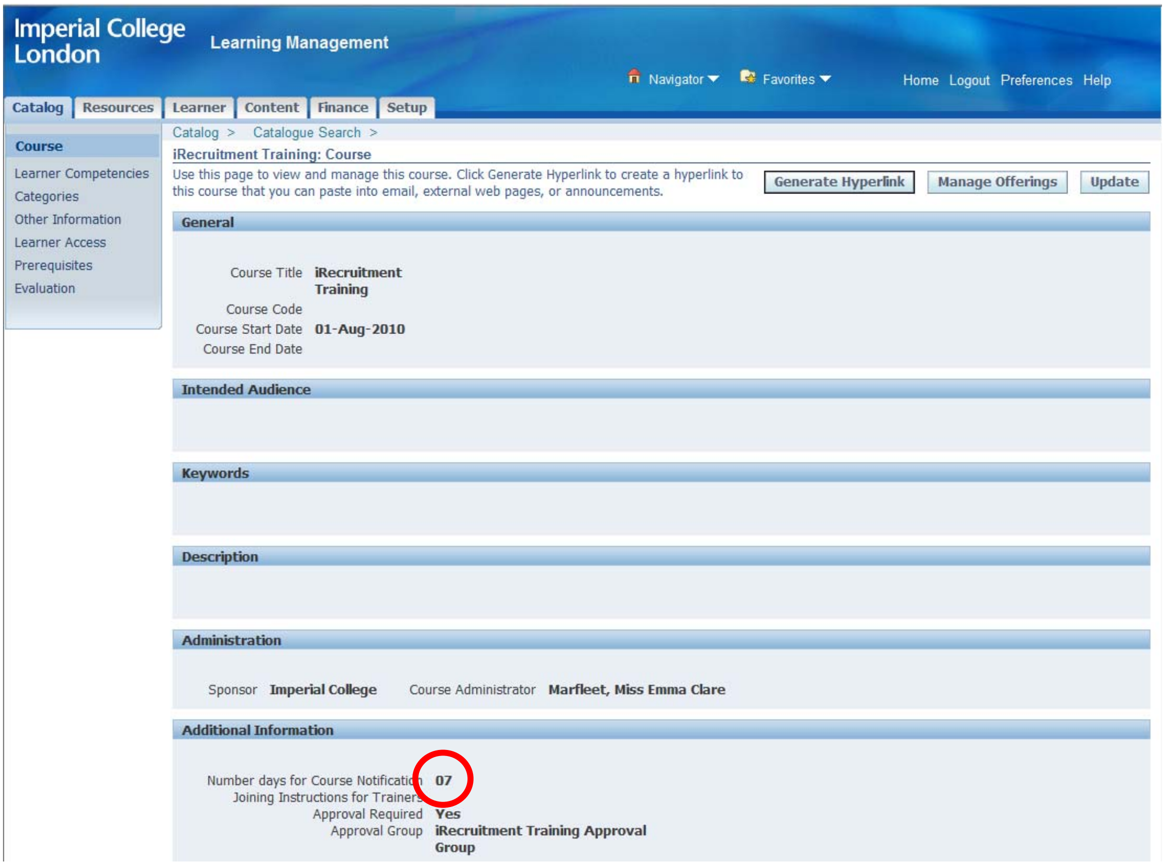
If the joining instructions have not been sent, and if the rescheduled date is more than 7 days away, you can override the **Number of Days for Course Notifications** at Class level.

1. Check the number of days at Class level. This is displayed in the **Override Number of Days for Course Notifications** field:



Note: If there is no value in this field, it means that the **Number of Days for Notification** will default to what saved at Course level. If this is the case, you should check what was entered at Course level by checking the **Number of Days for Notification** field in the Course form. Example below:

OLM GUIDANCE NOTES



Adjusting the enrolments to re-fire automatic notifications:

Once you have changed the dates of your class you will need to update your enrolments individually to ensure that they get a new booking confirmation and joining instructions with the correct information. However, delegates will still need to be notified of the changes by normal email and informed that they will receive another set of joining instructions

2. Click on the enrolments list and select the update button to the right of each enrollment.

3. In the update screen for each enrollment- scroll down to the bottom of the page (the Additional Information section) and change the acknowledgement booked sent and joining instructions booked sent fields to NO.

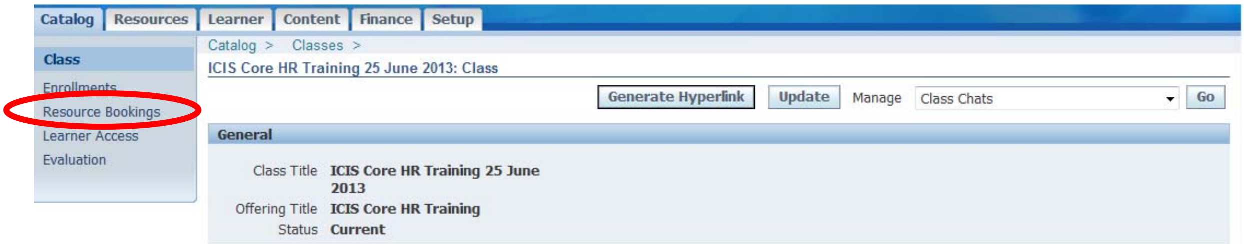
4. Remember to click apply at bottom of screen.

5. The enrollment has now been adjusted so that notifications will fire off at the appropriate times for the new dates of the class.

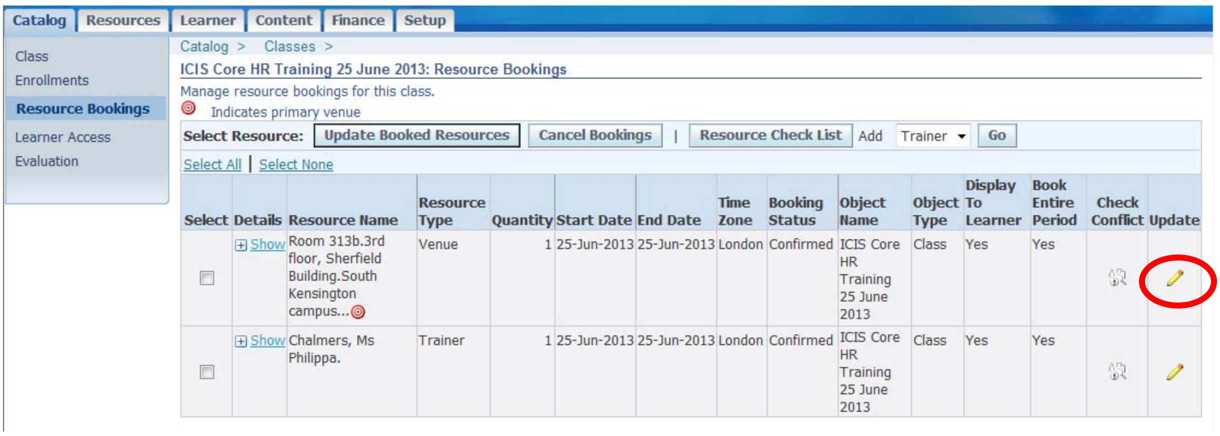
Changing Resources:

You will also need to update the resources for the class.

1. Click on Resource Bookings on the left hand side of the screen.



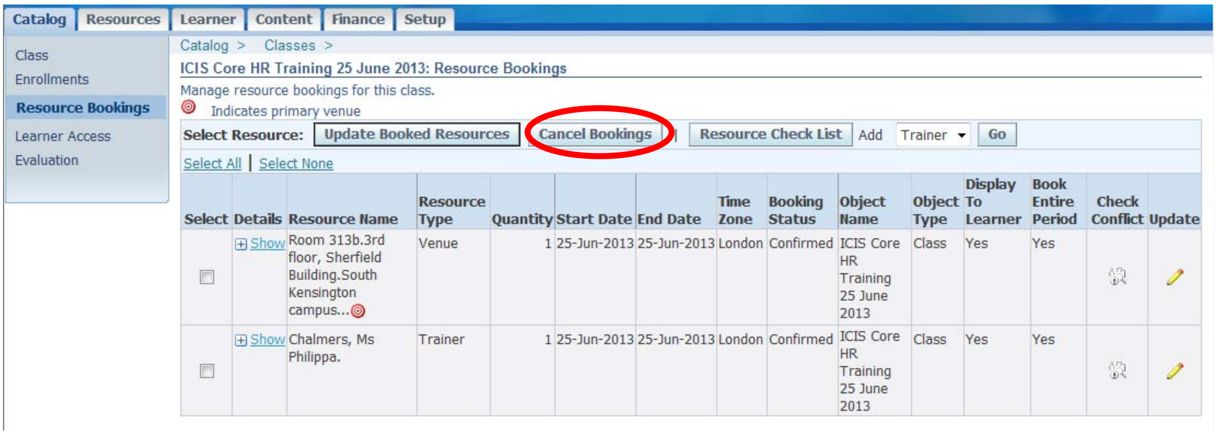
2. Click on the Update button to the right of the venue details and change the dates to the same as the new class dates.



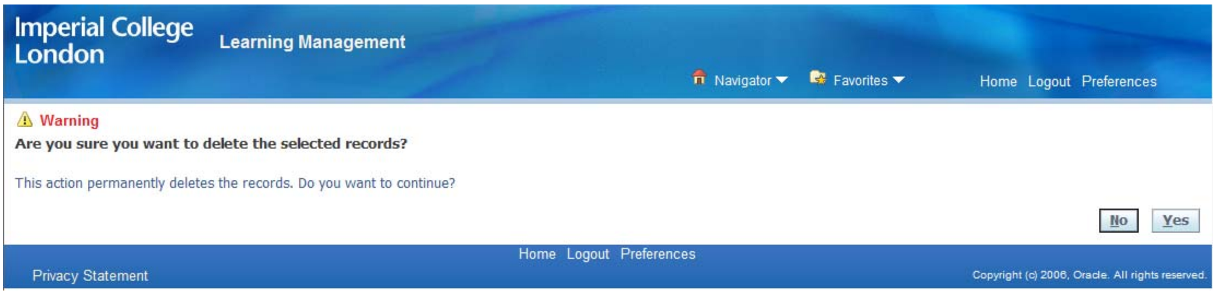
OLM GUIDANCE NOTES

To delete/cancel a resource:

1. Select the resource you wish to delete and then select the Cancel bookings button above.



2. A warning message will appear asking whether you wish to delete the records. Select yes and continue the transaction.

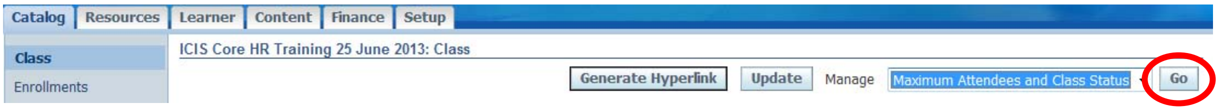


3. A confirmation message will appear –

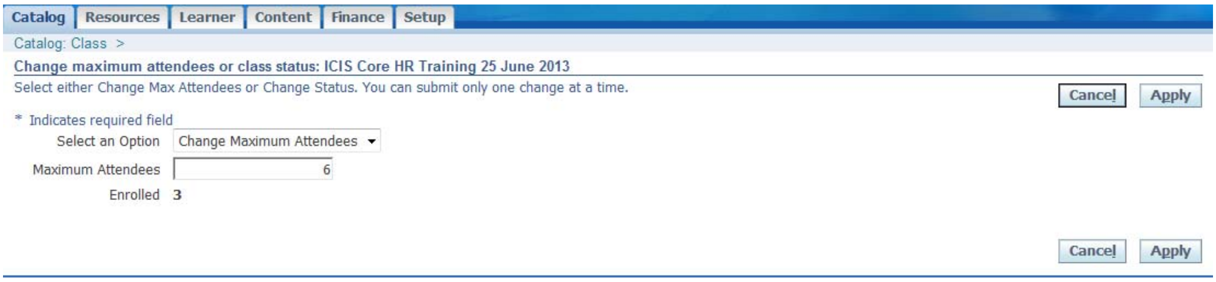
Changing Maximum Number of Delegates:

The process for this is the same as the previous OLM version.

1. Select the class you wish to edit.
2. Go to the top of the screen where there is a field 'Maximum attendees and class status'.
3. Select the go button beside the field.



4. Enter the number of maximum attendees you wish to change to. See below



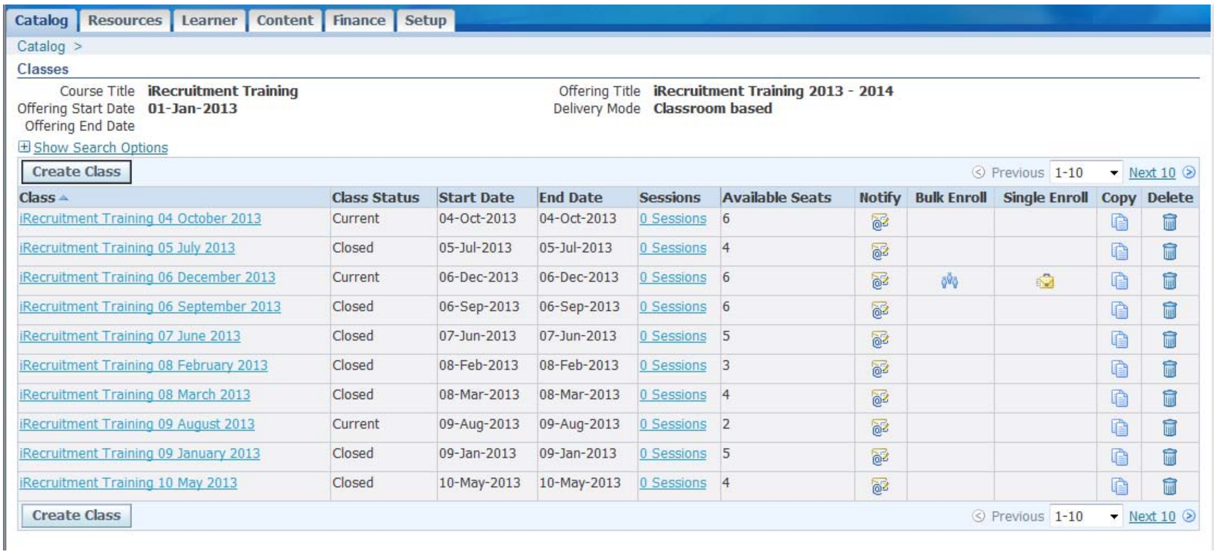
5. Click Apply.
6. You will get a warning message as follows.

7. Select 'yes' and a confirmation notice will appear:

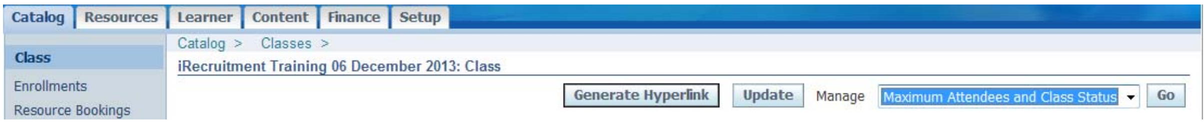
OLM GUIDANCE NOTES

Cancelling a Class:

1. Select the class you wish to cancel.

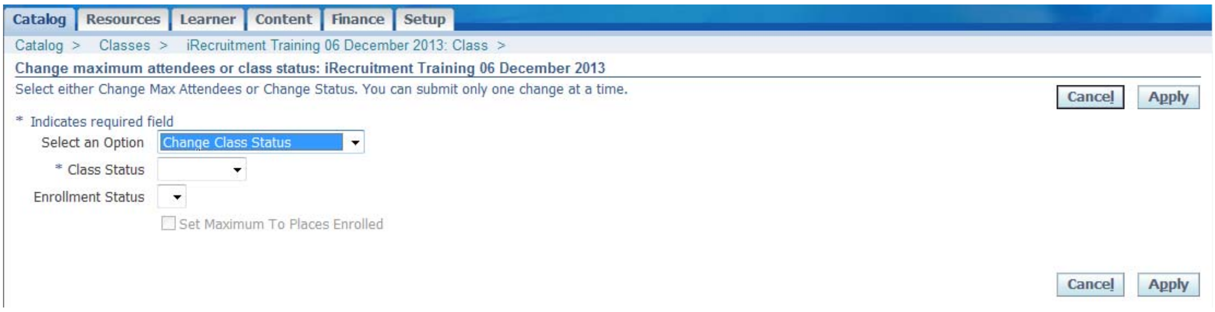


2. Once the class form is open, select the 'Go' button next to the 'Manage maximum attendees and Class status' field.

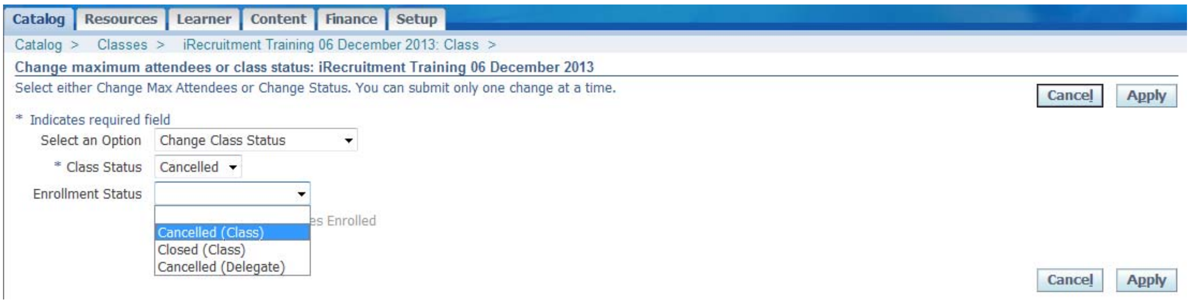


3. This screen will appear. Select an option by going to the drop down list next to the Change Maximum Attendees field.

4. Select the class status 'cancelled'

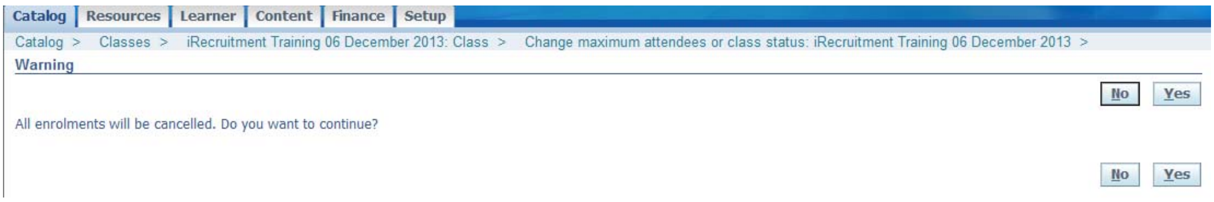


5. Select 'cancelled class' in the Enrollment Status field as below. Click Apply.

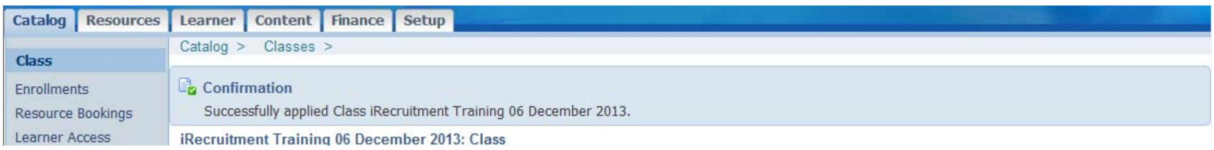


6. A warning message informing you that your enrolments will be cancelled will appear. Select 'yes'.

7. If you would rather transfer all the enrolments on to a Course Waiting list or a newly scheduled class then do this before you cancel the class.



8. If this is fine, proceed, select yes and you will get a confirmation that the class has been cancelled.

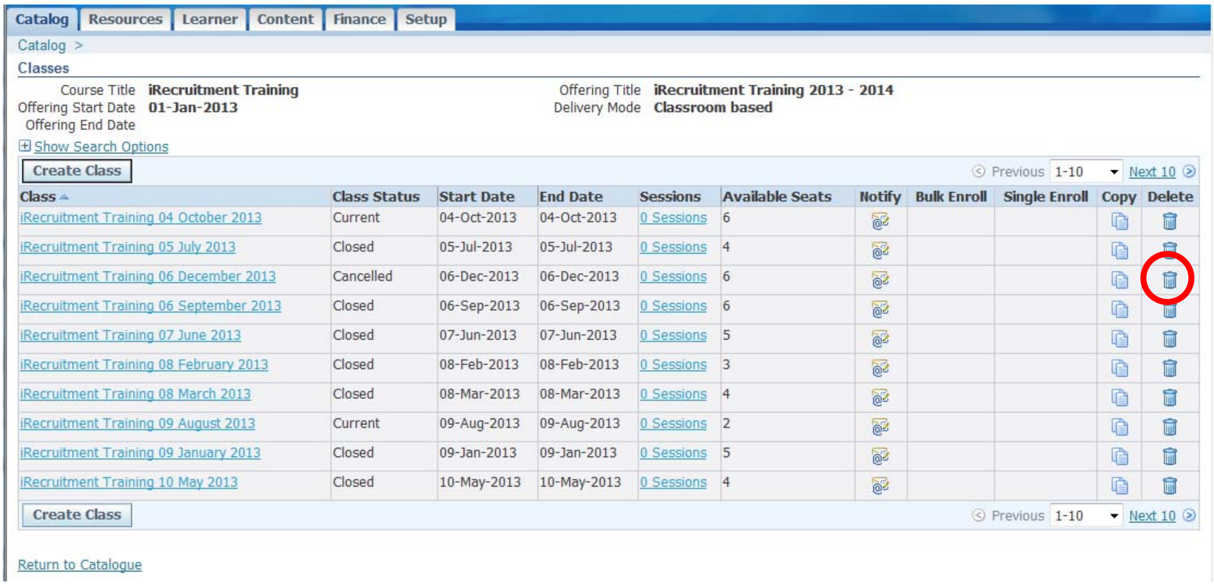


Deleting a Class:

Deleting a class will remove the class permanently from the database. The only reason that you may need to delete a class is when it was created by mistake.

Note: If a class is cancelled you must not delete the class but cancel it. Also, before deleting a Class you will need to delete delegate enrolments and resource bookings.

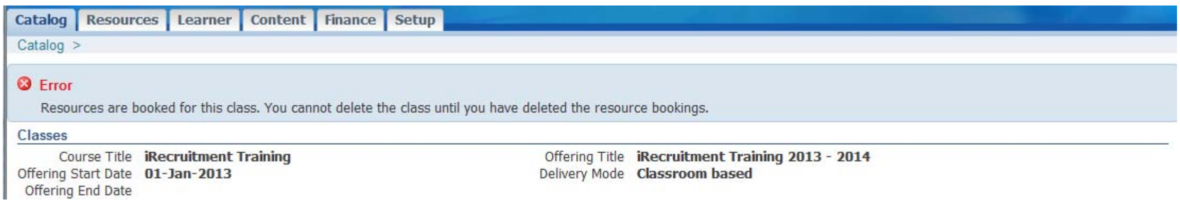
1. Select the class you wish to delete and select the delete icon to the right of the class.



2. A warning message will appear on the screen to say that this record with be permanently deleted form the database. Ensure it is the correct Class and click Yes to proceed.

3. Your class will be deleted.

Note: If you have not deleted the resources for the class, you will need to do this before you can delete the class otherwise an error message appears as follows –



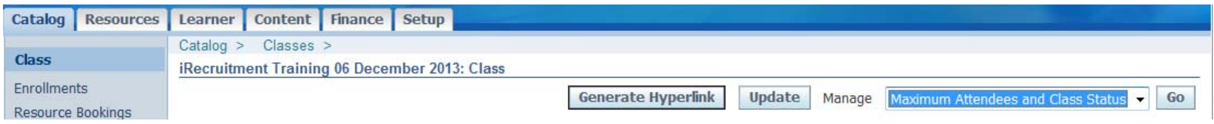
4. To delete resources and enrolments please see guidelines in previous chapters.

Adding Enrollments after the Class has taken place:

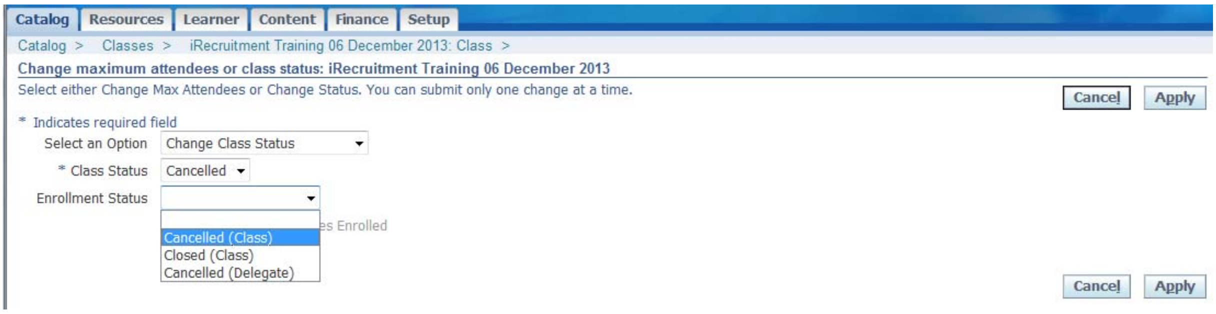
Delegate enrollments can be added *after* the Class has taken place. Enrol them as 'attended' not 'booked'. This will ensure that OLM system does not send out a booking confirmation and joining instructions. However, to do this, ensure that the status of the Class has been changed to Current and that the enrollment end date has been adjusted to the date you will be adding another enrollment.

Change Class Status:

1. In brief, open the class you wish to change the status of, select Go beside the 'Manage Maximum attendees and Class status' field.



2. Select current (not cancelled as shown in image) and apply.



Closing Classes:

When a class has finished there are three things you will need to make sure that you update:

Update Enrolments:

All enrolments will need to be updated either to attended, absent, or cancelled. There should be no enrolments that are still left as booked.

- Check absences and cancellations and change their status to this.
- Use bulk change for majority who need status changed to attended .
- Check if there are any "Temp Records" and delete these and enrol the "Real" record now that the person is a member of staff.
- Change the status of the class to Closed.

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Updating Delegate Statuses:

When closing classes, all delegate enrolments will need to be updated either to attended, absent, or cancelled. There should be no enrolments that are still left with the status booked.

You should check the following when updating delegate statuses:

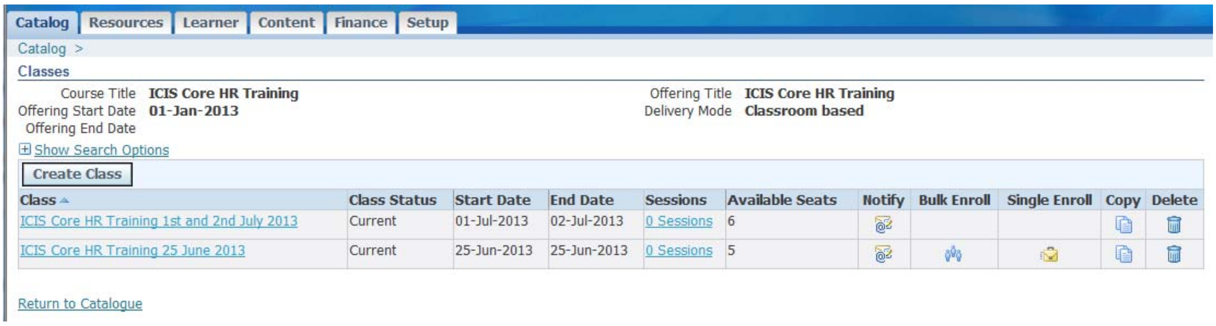
Check absences and cancellations and change their status to this. A distinction has been made between absence (no charge) and absence (charge) to enable Staff development to keep track of unnecessary absences.

You can now more easily update more than one enrolment at a time in the list of enrolments, usually changing to updated

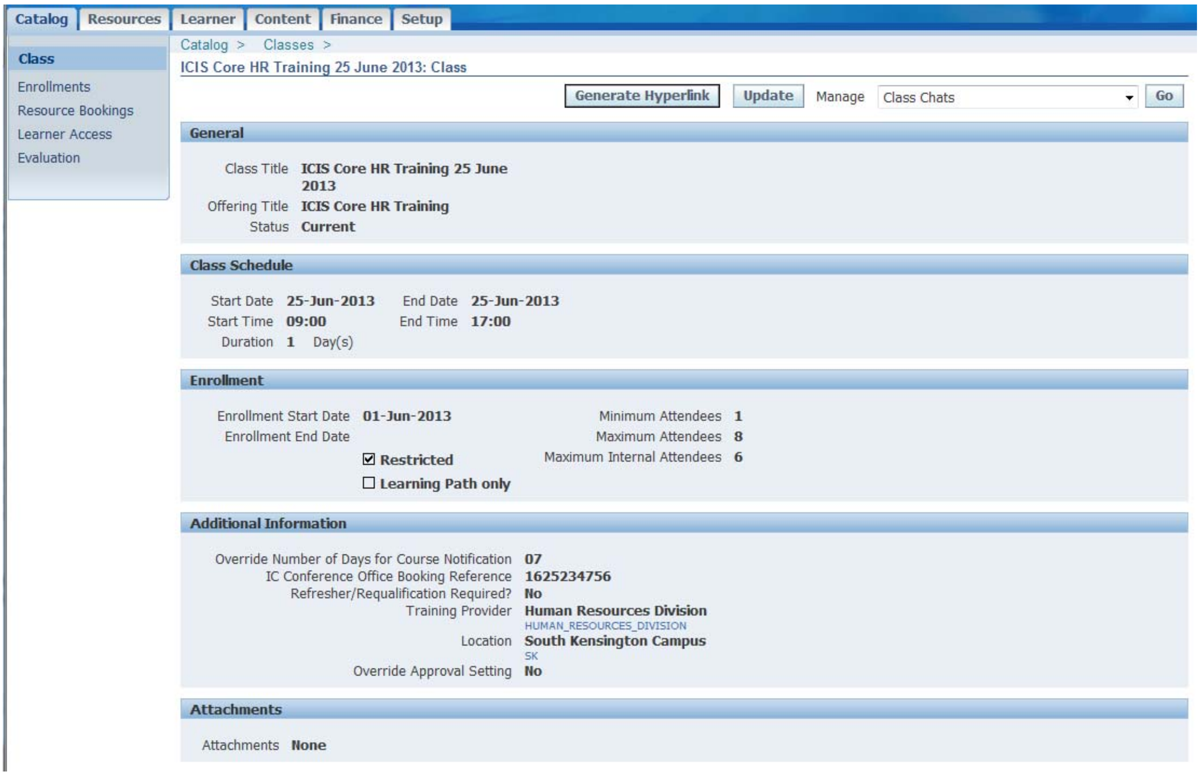
Check if there are any "Temp Records" and delete these and enrol the "Real" record now that the person is a member of staff.

To change delegate status:

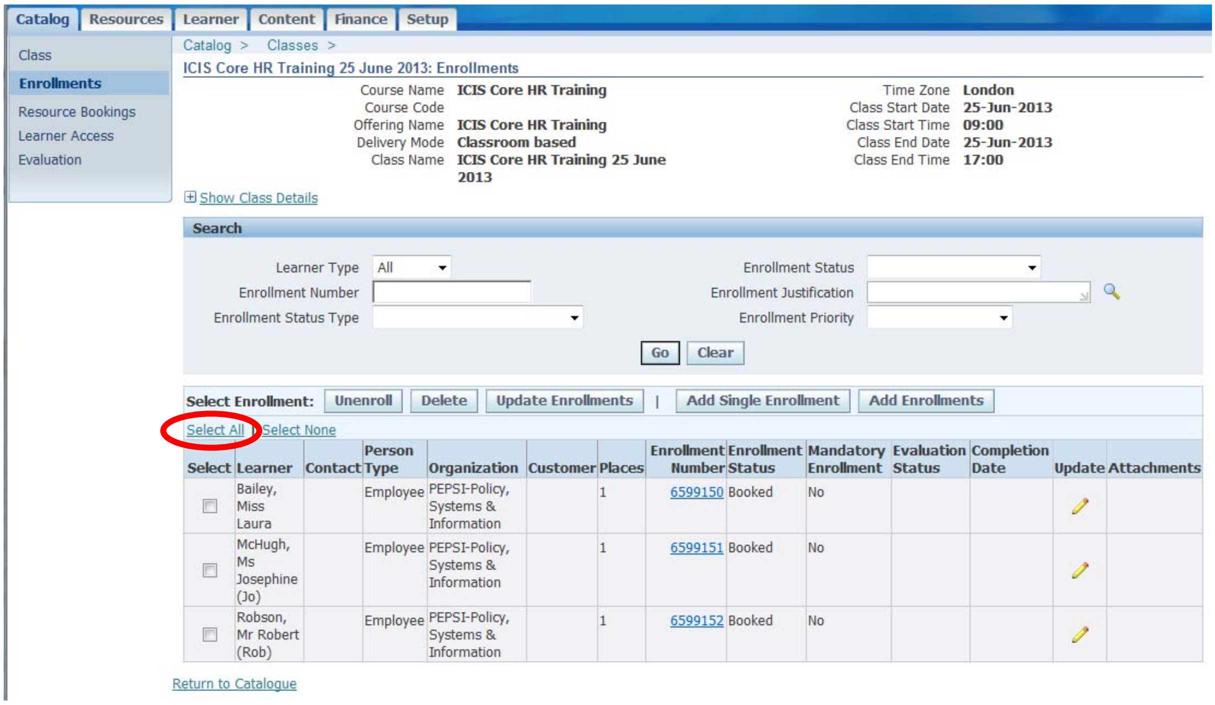
1. Select the class you are closing to update the delegate status.



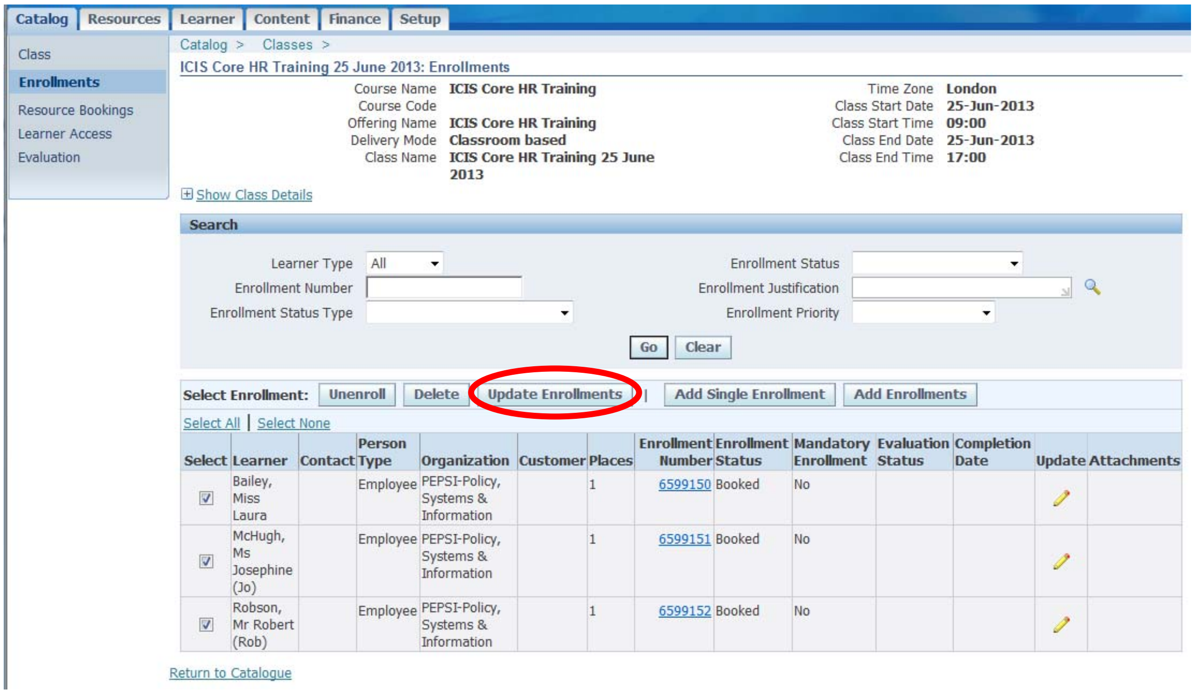
2. Click on Enrollments at the top left hand side of the screen.



3. A list of delegates enrolled onto the course will appear. Click on the Select All button or simply select those delegates you wish to update by clicking on the box to the left of their name.



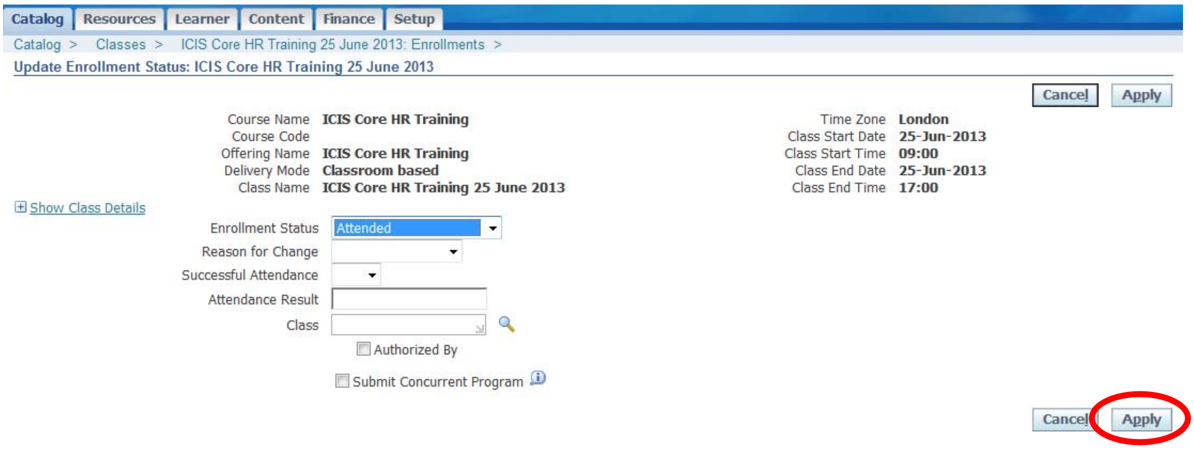
4. Click Update Enrollments.



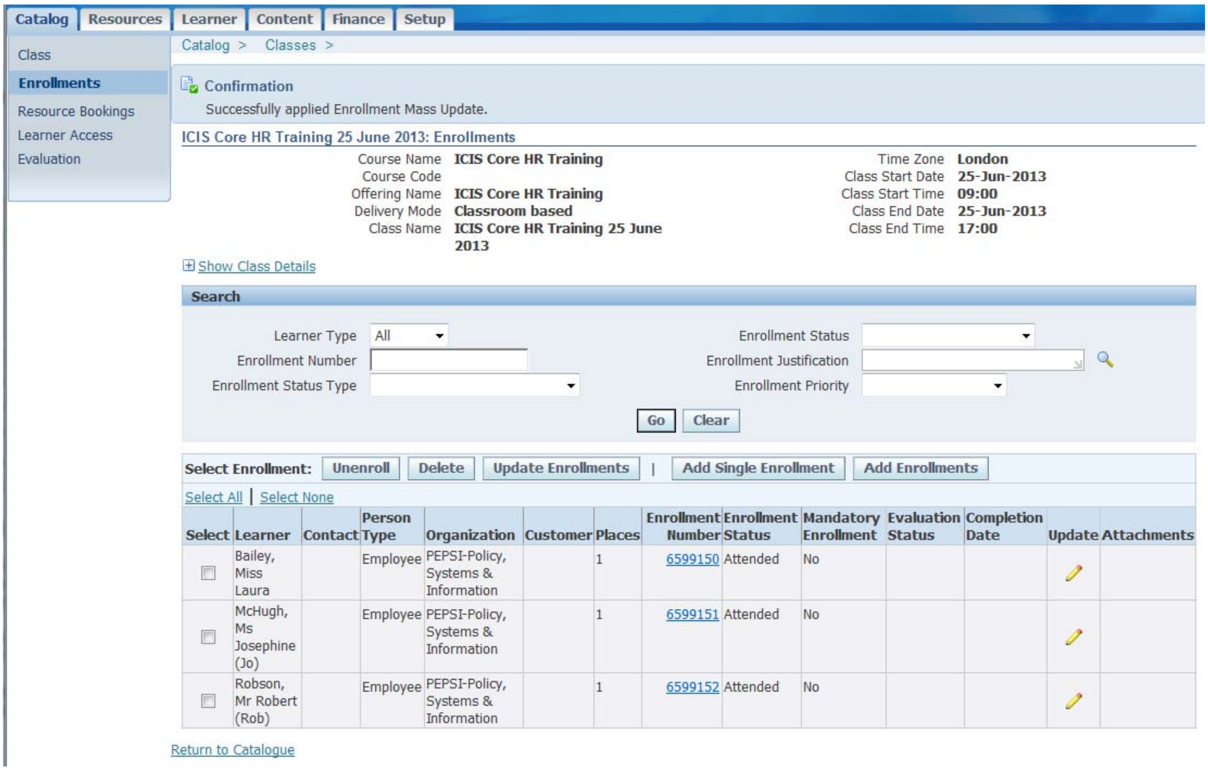
5. Click on the Enrollment status to select a new status. Click Apply.

Note: If you are selecting an Enrollment status of ‘Attended’, you should also update the ‘Successful Attendance’ to ‘Yes’.

OLM GUIDANCE NOTES



6. The new class status will show in the list of enrolments.



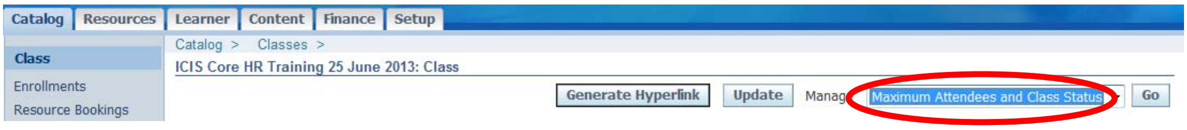
Closing a Class/Changing Class Status:

After a Class has taken place, and after the evaluations have been input into the record, the Class must be closed. The following steps describe how to change the status of the Class from Current to Closed.

Closed classes can be re-opened, if necessary, after they have been closed, by reversing the steps that change the status from Current to Closed.

OLM GUIDANCE NOTES

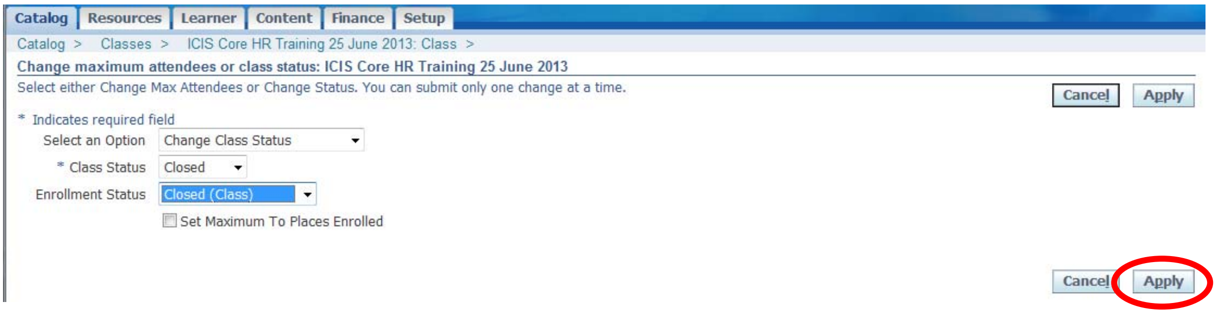
1. Find your class. Select Maximum Attendees and Class Status from the drop down menu at the top of the screen. Click Go.



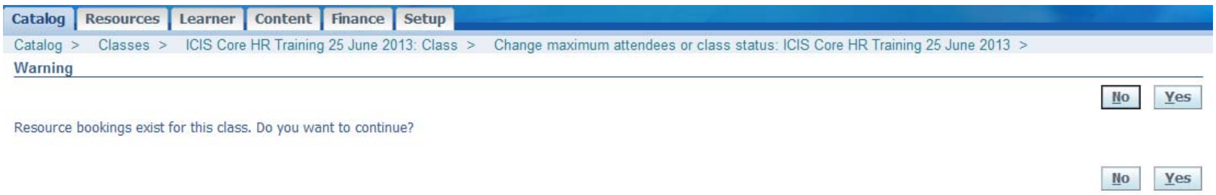
2. Choose the following from the drop down menus:

- Select an Option: Change Class Status
- Class Status: Closed
- Enrollment Status: Closed (Class)

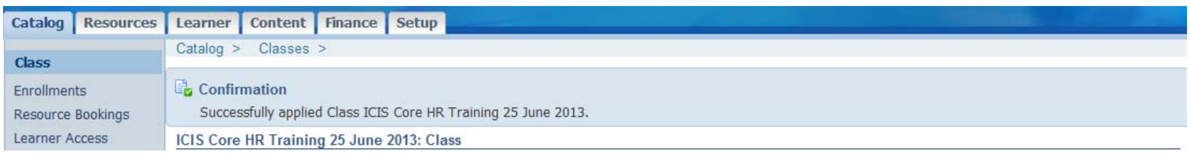
3. Click Apply.



4. Click Yes to confirm you want to continue.



5. A confirmation message will be displayed.



Re-Opening the Class:

Closed classes can be re-opened, by following the same steps as above and changing the status of the Closed Class to Current.

OLM GUIDANCE NOTES

Notifications:

This chapter gives a detailed explanation of notifications sent by the system.

Booking Confirmation:

A Booking Confirmation notification is sent to a delegate the day after they have been enrolled onto a Class.

The information contained in a Booking Confirmation notification can be changed by updating the respective Course page. You may attach a Pre-Course Questionnaire to this notification.

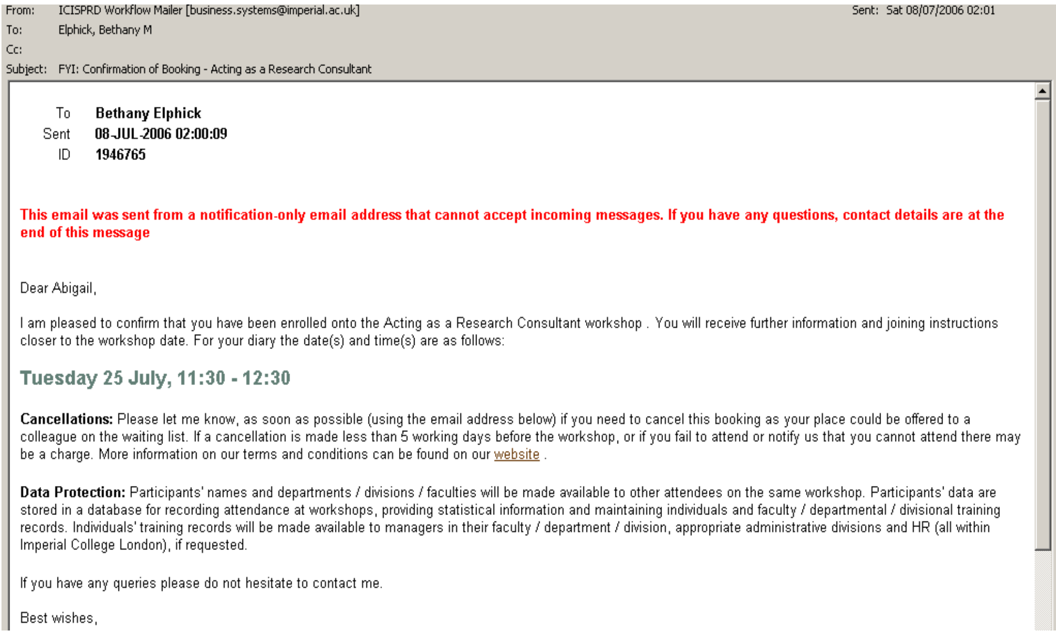
In the Course page, anything entered into the Intended Audience field will be displayed in the Booking Confirmation notification. Text in the Intended Audience field will appear in the Confirmation of Booking notification. It is recommended that you add a line advising delegates about returning the attachments.

For example, if a pre-course questionnaire is going to be attached, you will want to ask delegates to complete and return it as soon as possible so that this information can be passed on the trainer.

Do not put specific dates in the intended audience field because this information is carried through to booking confirmations for a number of different classes on a number of different dates under a particular course title.

A follow-up reminder for the completion and return of your questionnaire can be added at Class level, and will be fired off with the joining instructions. Please refer to the Chapter on Classes in Section 3, Creating the Catalogue for more information.

The booking confirmation appears as below;



From: ICISPRD Workflow Mailer [business.systems@imperial.ac.uk] Sent: Sat 08/07/2006 02:01
To: Elphick, Bethany M
Cc:
Subject: FYI: Confirmation of Booking - Acting as a Research Consultant

To **Bethany Elphick**
Sent **08-JUL-2006 02:00:09**
ID **1946765**

This email was sent from a notification-only email address that cannot accept incoming messages. If you have any questions, contact details are at the end of this message

Dear Abigail,

I am pleased to confirm that you have been enrolled onto the Acting as a Research Consultant workshop . You will receive further information and joining instructions closer to the workshop date. For your diary the date(s) and time(s) are as follows:

Tuesday 25 July, 11:30 - 12:30

Cancellations: Please let me know, as soon as possible (using the email address below) if you need to cancel this booking as your place could be offered to a colleague on the waiting list. If a cancellation is made less than 5 working days before the workshop, or if you fail to attend or notify us that you cannot attend there may be a charge. More information on our terms and conditions can be found on our website .

Data Protection: Participants' names and departments / divisions / faculties will be made available to other attendees on the same workshop. Participants' data are stored in a database for recording attendance at workshops, providing statistical information and maintaining individuals and faculty / departmental / divisional training records. Individuals' training records will be made available to managers in their faculty / department / division, appropriate administrative divisions and HR (all within Imperial College London), if requested.

If you have any queries please do not hesitate to contact me.

Best wishes,

Joining Instruction:

A Joining Instruction notification is sent a specified number of days before the start of a Class. This number (course notification period) is selected when the Course is set up, but can be overridden when the Class is set up.

The values you can select for the number of days for sending notifications are: 00, 07, 14, 21, or 28 days. It is important that attachments are added to a Class at least one day in advance of this notification period, i.e. 8, 15, 22 etc

If someone has been enrolled after the 14 day fire off, the course notification (joining instructions) will not fire off 13, 12, 11, 10 etc days before the course start date but 7 days prior to course start date. If a delegate is enrolled after the 7 days fire off, the course notification will go out 7, 6, 5, 4, 3, 2 or 1 day prior to course start date.

Venue and trainer details will automatically be fed into the information that is provided in the Joining Instruction. It is critical that the venue and trainer have been allocated to your classes before the joining instructions are sent out automatically. Please refer to the Chapter, Allocate a Resource to a Class or Session in Section 3, Creating the Catalogue.

You will also want to attach a programme and participant list to go out with the joining instructions. The participant list can be obtained via a report from Discoverer Viewer. Please see Section 11, ‘Reports’ on how to do this. These documents will need to be attached at class level. For further guidance on this please see the Class Chapter in Section 3.

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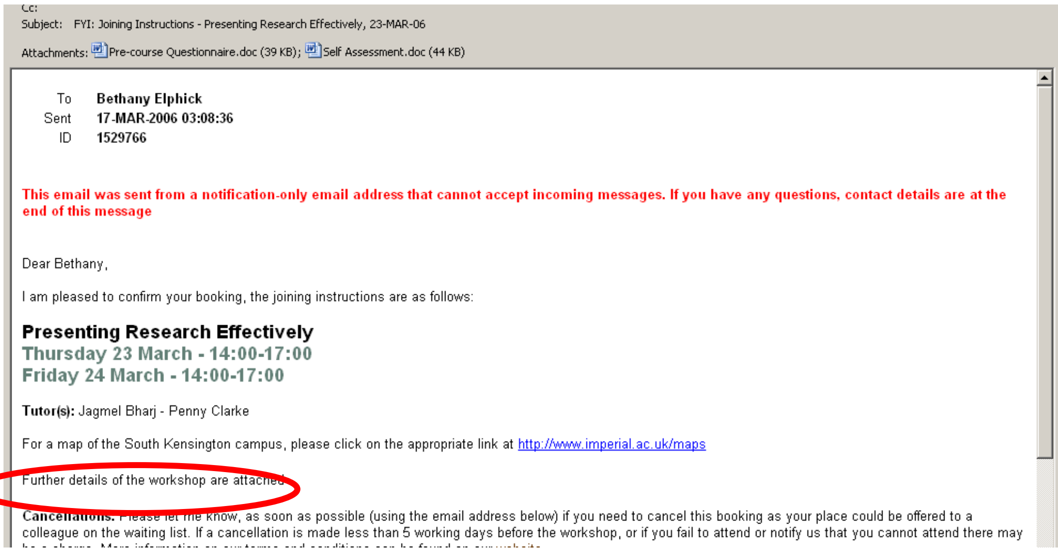
If you want to add any additional information to appear in the Joining Instructions i.e. about the related class or refer to the attachments (which are attached at class level), text can be added in the Description field of the Offering for that class.

You could use this field to remind delegates to return a pre-course questionnaire, e.g. "Please return the completed pre-course questionnaire if you have not done so already."

You could also use this field to warn delegates that the Class may be cancelled due to a low take-up, e.g. "Please note, due to the low number of enrolments for this particular course, there is risk of cancellation. It would be greatly appreciated if you could let any interested colleagues know about the course. If we do need to cancel we will notify you 5 days before the course. If you do not hear from us then please presume the course will run."

An example of where the text will be displayed in the Joining Instructions notification is shown below:


Cc:
Subject: FYI: Joining Instructions - Presenting Research Effectively, 23-MAR-06
Attachments: Pre-course Questionnaire.doc (39 KB); Self Assessment.doc (44 KB)

To Bethany Elphick
Sent 17-MAR-2006 03:08:36
ID 1529766

This email was sent from a notification-only email address that cannot accept incoming messages. If you have any questions, contact details are at the end of this message

Dear Bethany,

I am pleased to confirm your booking, the joining instructions are as follows:

Presenting Research Effectively
Thursday 23 March - 14:00-17:00
Friday 24 March - 14:00-17:00

Tutor(s): Jagmel Bharj - Penny Clarke

For a map of the South Kensington campus, please click on the appropriate link at http://www.imperial.ac.uk/maps

Further details of the workshop are attached

Cancellations: Please let me know, as soon as possible (using the email address below) if you need to cancel this booking as your place could be offered to a colleague on the waiting list. If a cancellation is made less than 5 working days before the workshop, or if you fail to attend or notify us that you cannot attend there may

Note: It is very important to remember that any information you add here will go out with the Joining Instructions for all the classes set up within this offering. You must make sure that if you have added information for a particular class that you delete this information once the joining instructions have gone out otherwise this information will go out for the next class as well.

Attachments:

Attachments will be sent with notifications, so please ensure:

- that they are up to date, and not draft documents
- they are attached on time so that they are sent the correct number of days before a Class is scheduled to take place
- that they are saved on a shared drive so that other colleagues can administrate this course if necessary

OLM GUIDANCE NOTES

- They do not have a '&' in the title of the document (i.e. the name of the file). For some reason OLM does not like this symbol so if you have a programme with two dates for e.g. *Time Power Programme - Mon 18 Aug and Tues 26 Aug 2008* make sure you put 'and' rather than '&'.

Common information shared across all notifications:

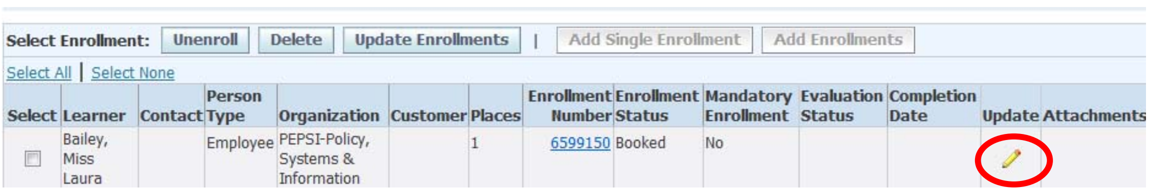
Notification type	Where it is attached	When attachments should be added	Types of attachments	When the notification will be sent
Booking Confirmation	Course	When Course is created	Pre-Course Questionnaire	Day after enrolment
Joining Instruction	Class	8 or 15 days before Class / Session	Programme / Participant List	7, 14, 21, or 28 days before

Checking automatic notifications have fired off:

If a delegate contacts you claiming not to have received either a booking confirmation or a joining instruction you can check this through Discoverer Viewer.

I'm afraid you cannot rely on the individual booking form information on OLM to ascertain whether a joining instruction (or booking confirmation) has fired off successfully or not.

In the update screen for each enrolment- when you scroll down to the bottom of the page (the Additional Information section) the following fields 'acknowledgement booked sent' and 'joining instructions sent' fields have a YES or NO. This is a Yes or No to whether the system has attempted to send or not, not whether it has been successful or not.



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You'll need to run a 'Joining and booking instructions status report' in Discoverer Viewer to find out whether your notifications have been sent successfully or not. See the reports chapter, p. 241 for instructions on how to run this report.

Course Administrators Details assigned to each of the courses:

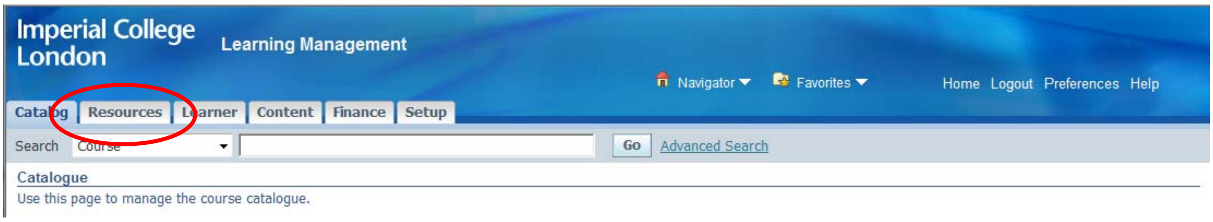
In the course details form, there is a field for the administrator of that particular course to enter their name. When an employee leaves and another takes over their administrative role, the new employee/administrator must replace the old administrators' name, otherwise the notifications for the course will not fire off.

Viewing Resource Bookings:

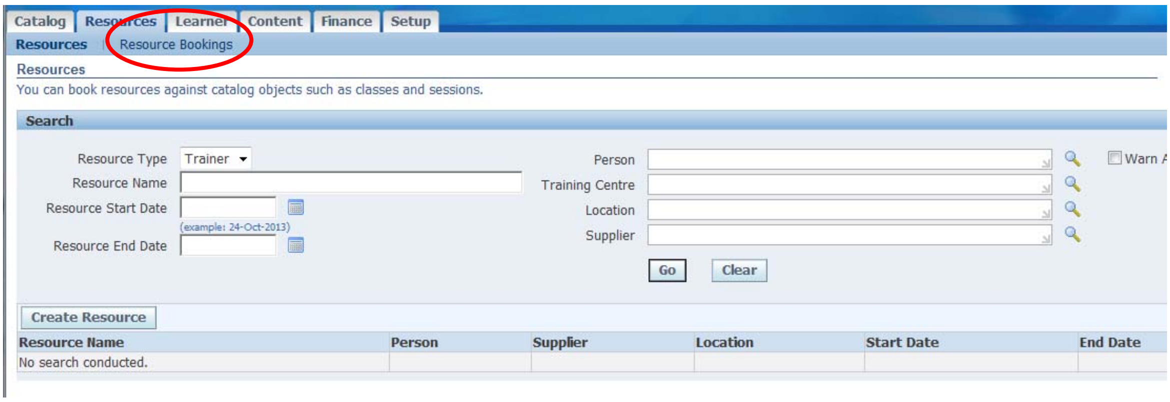
When allocating resources to your classes you may find that a particular resource has been booked out already e.g. OLM system gives you a warning message that Room 1 SALC is not available. This is more than likely a booking error on the part of another administrator.

Here is a way of finding out what class the resource (trainer/ venue has been booked) and contacting the administrator for that course.

1. Go to the 'Resources' tab at the top of the screen



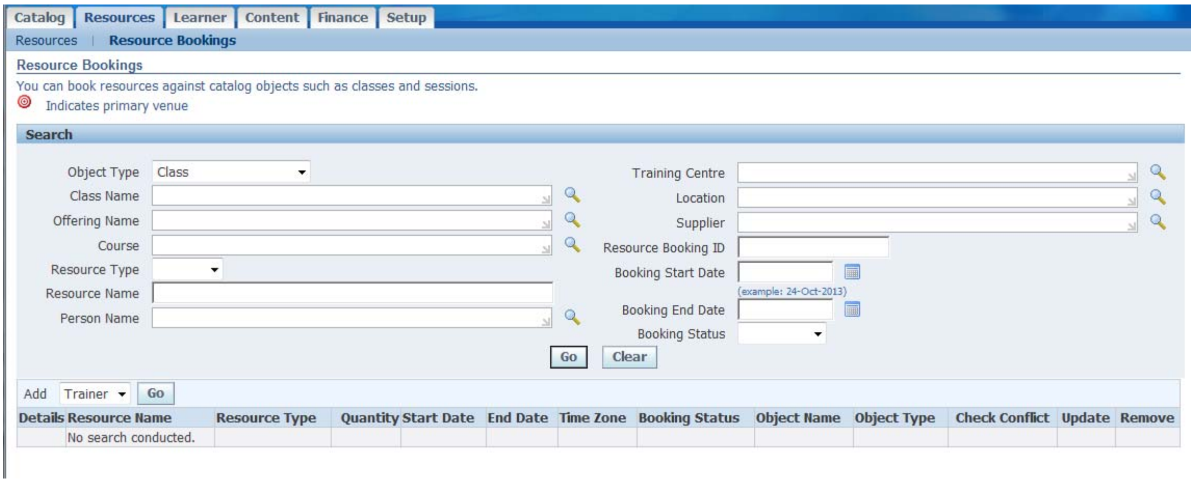
2. The resources window will appear



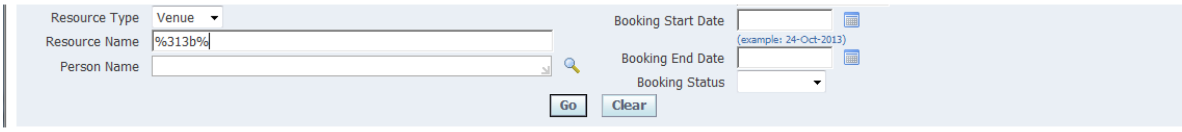
3. Find in the blue menu at the top of this screen, 'Resource Bookings' in white writing as highlighted above.

4. Click on the Resource Bookings. The resource bookings screen will appear

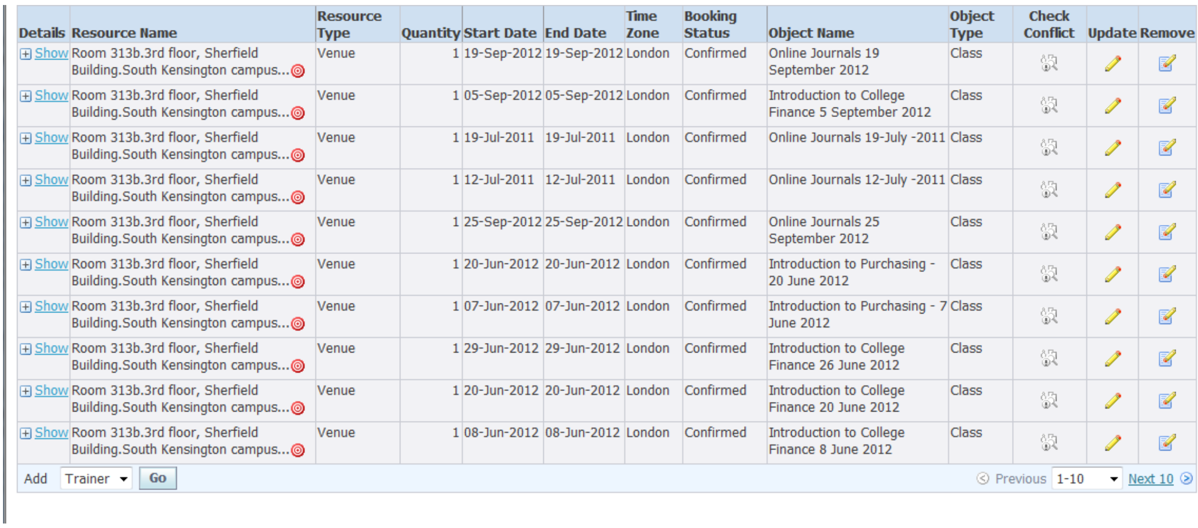
OLM GUIDANCE NOTES



5. Select the Resource type (venue or trainer) in the Resource type field and in the Resource Name type in the resource you want to find out about, using a percentage sign before and after (this usually helps).



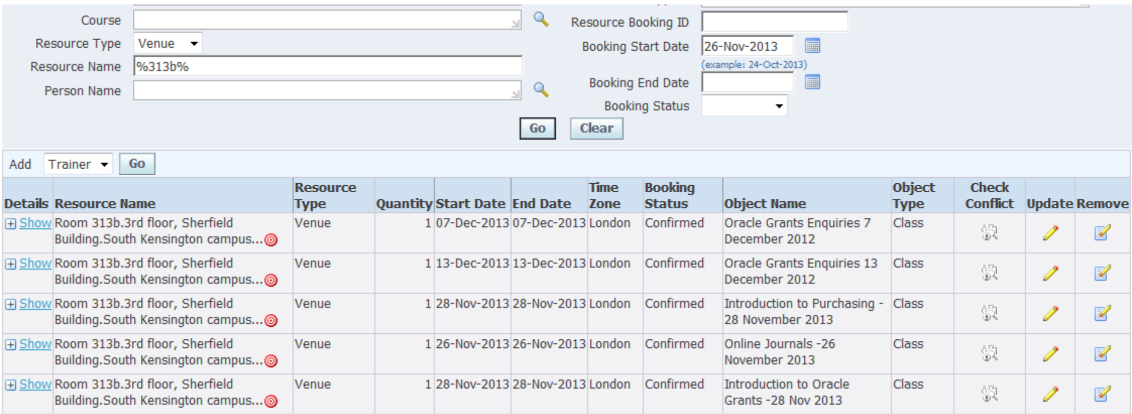
6. If you do not search for a particular date, and search as above you will be provided with all the classes that that particular venue has been booked on.



Details	Resource Name	Resource Type	Quantity	Start Date	End Date	Time Zone	Booking Status	Object Name	Object Type	Check Conflict	Update	Remove
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	19-Sep-2012	19-Sep-2012	London	Confirmed	Online Journals 19 September 2012	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	05-Sep-2012	05-Sep-2012	London	Confirmed	Introduction to College Finance 5 September 2012	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	19-Jul-2011	19-Jul-2011	London	Confirmed	Online Journals 19-July -2011	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	12-Jul-2011	12-Jul-2011	London	Confirmed	Online Journals 12-July -2011	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	25-Sep-2012	25-Sep-2012	London	Confirmed	Online Journals 25 September 2012	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	20-Jun-2012	20-Jun-2012	London	Confirmed	Introduction to Purchasing - 20 June 2012	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	07-Jun-2012	07-Jun-2012	London	Confirmed	Introduction to Purchasing - 7 June 2012	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	29-Jun-2012	29-Jun-2012	London	Confirmed	Introduction to College Finance 26 June 2012	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	20-Jun-2012	20-Jun-2012	London	Confirmed	Introduction to College Finance 20 June 2012	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	08-Jun-2012	08-Jun-2012	London	Confirmed	Introduction to College Finance 8 June 2012	Class			

7. To narrow you search, add the date in the field to the right of the window- and you will see exactly where your resource has been booked

OLM GUIDANCE NOTES



Course
Resource Type: Venue
Resource Name: %313b%
Person Name
Resource Booking ID
Booking Start Date: 26-Nov-2013 (example: 24-Oct-2013)
Booking End Date
Booking Status
Go Clear

Add Trainer Go

Details	Resource Name	Resource Type	Quantity	Start Date	End Date	Time Zone	Booking Status	Object Name	Object Type	Check Conflict	Update	Remove
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	07-Dec-2013	07-Dec-2013	London	Confirmed	Oracle Grants Enquiries 7 December 2012	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	13-Dec-2013	13-Dec-2013	London	Confirmed	Oracle Grants Enquiries 13 December 2012	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	28-Nov-2013	28-Nov-2013	London	Confirmed	Introduction to Purchasing - 28 November 2013	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	26-Nov-2013	26-Nov-2013	London	Confirmed	Online Journals -26 November 2013	Class			
Show	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	28-Nov-2013	28-Nov-2013	London	Confirmed	Introduction to Oracle Grants -28 Nov 2013	Class			

8. Select the Show details button below to find out in what department this course sits. This will then help you track down the administrator for that particular course. Alternatively, you can go in to the course through the catalogue where it lists the administrator.

Details	Resource Name	Resource Type	Quantity	Start Date	End Date	Time Zone	Booking Status	Object Name	Object Type	Check Conflict	Update	Remove
Hide	Room 313b.3rd floor, Sherfield Building.South Kensington campus...	Venue	1	07-Dec-2013	07-Dec-2013	London	Confirmed	Oracle Grants Enquiries 7 December 2012	Class			

Resource Booking ID: **1575115**
Parent Object Name: **Oracle Grants Enquiries (2011 - 2012)**
Parent Object Type: **Offering**
Supplier
Training Center: **PESD- Learning and Development Centre**
Location
Start Date: **07-Dec-2013**
End Date: **07-Dec-2013**
Start Time: **10:00**
End Time: **13:00**
Timezone: **London**

Reports:

Logging in and Standard Reports:

This document shows you how to log in to Discoverer viewer and gives an introduction to standard reports

About standard reports:

Data from OLM can be viewed using Discoverer Viewer. A number of standard reports have been set up to answer most common requests. Further reports could be set up if needed. Please contact Petra Dodd in Staff Development who will be able to advise you further. Below is a list of standard reports outlining the information they provide. Chapter 2 will help you with running the reports and gives example output.

Attendance report – who has booked on/attended a particular course or courses from a particular department/division, could be used for information for departments. This report can be used to check delegates who have ‘absent-charge’ status.

Training History Report - this report is like the Attendance Report but it lists all the training courses that members of staff have attended (including the migrated data from years previous to the OLM system and any external courses) whereas the Attendance Report only lists the courses run since 2006/7.The Training History report will be useful for departmental heads/DA’s who need to see information on the courses attended in their particular department.

Catalogue overview – a list of classes with the trainer, administrator, venue, nos of participants booked, wait listed, attended and the minimum and maximum nos for that class. This is a useful report for administrators to check up on their own classes, whether they have allocated resources to all their classes etc.

Joining and booking instructions status report – to check who of those enrolled have received confirmation emails and joining instructions

Participants list – details about who is booked (as opposed to waitlisted, attended etc) on a particular class, can be used to send to trainer, to send to participants, as a register (separate one for SDU below)

Review of class minimum number – lists the classes where the enrolled delegates is below the minimum number. This is to help administrators decide on class cancellations or what classes need to be further advertised.

SDU Participant list - details about who is booked (as opposed to waitlisted etc) on a particular class, can be used for trainer, to send to participants, as a register

SLTP report – information of delegates enrolled into SLTP

Running Reports in Discoverer Viewer:

This chapter shows you how to run Reports in Discoverer Viewer.

OLM GUIDANCE NOTES

About this document:

This chapter shows you how to run all the standard reports and gives you examples of the information provided (i.e. outputs) from all the reports. Using the attendance report as an example, the following instructions show you how to select parameters and consider data protection issues when running reports. There is a separate chapter on running the SDU Participant List Report, the HESA report and …..

About the Attendance Report:

This report covers who has booked on/attended/waitlisted etc a particular course or courses from a particular department/division. This could be used to send information to departments about attendance of their staff on workshops. This report differs from the Training History Report listed later because it only covers courses that have been run since 2006/7 (i.e. since we have used OLM). To report on courses run before this and to give a complete training record use the Training History report. The advantage of this report over the training history report is you can select to report on just one category or course.

There are data protection issues about who should view any training data which lists who has attended. HoDs, DAs, FOOs and HR staff are allowed to view participants' data for their Faculty/Departments/Divisions only. Managers should only view data for their staff. When you send data out to Departments/Divisions you should always include the following sentence in your e-mail/letter/memo, "To comply with the data protection act - details of who has attended what training can only be shared with the participants themselves, their manager, DA's, HoDs, Safety Officers and appropriate administrative divisions and HR". Always make clear what the limits of the data are e.g. tell them you haven't included SDU data, explain that you have only looked at last year or that you haven't included people who have booked only people who have attended workshop, and any delay in updated data. If you are unsure about whether to send information to Departments/Divisions check with your Data Protection Coordinator.

Running a Query:

1. Click on the Discoverer Viewer link http://discoicisprd.ad.ic.ac.uk:7777/discoverer/viewer?event=displayConnections&connectionAccessType=APPS&connectionLocale=en_us&database=ICISPRD&EUL=discover

2. Log in using your ICIS username, password and the database name ICISPRD (if not already populated). Click connect.

3. In the responsibility field - select your departmental OLM responsibility and 'continue' button.

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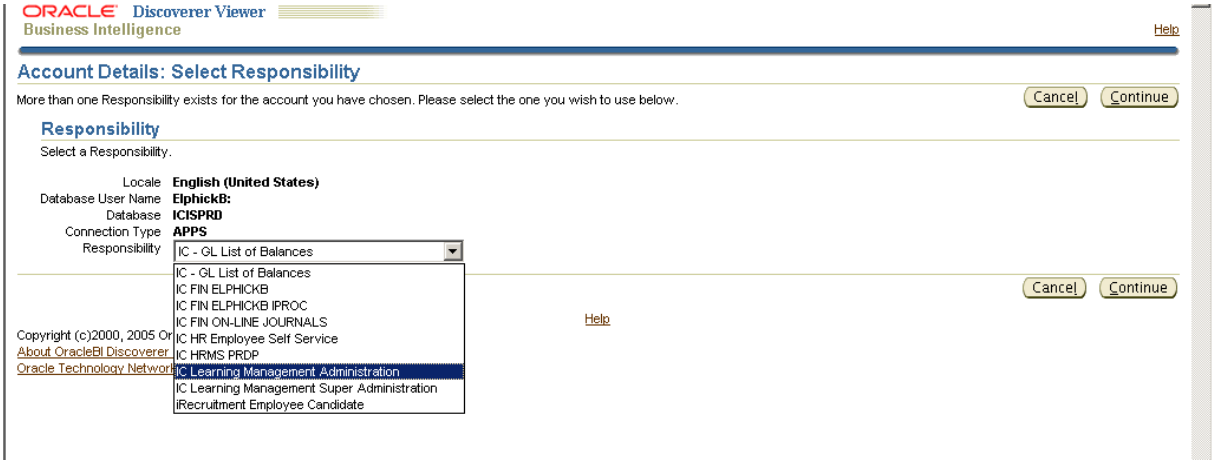
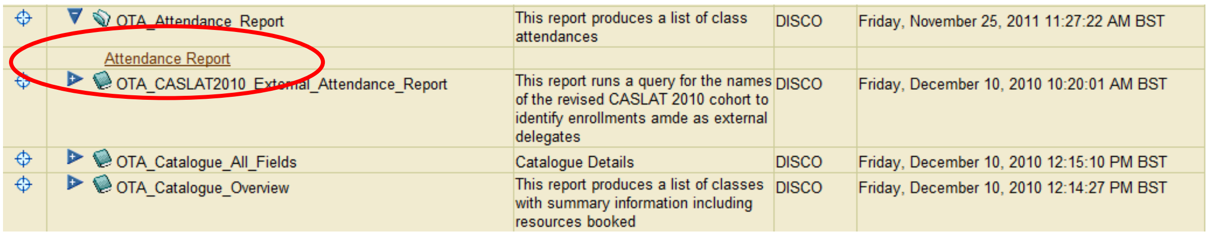
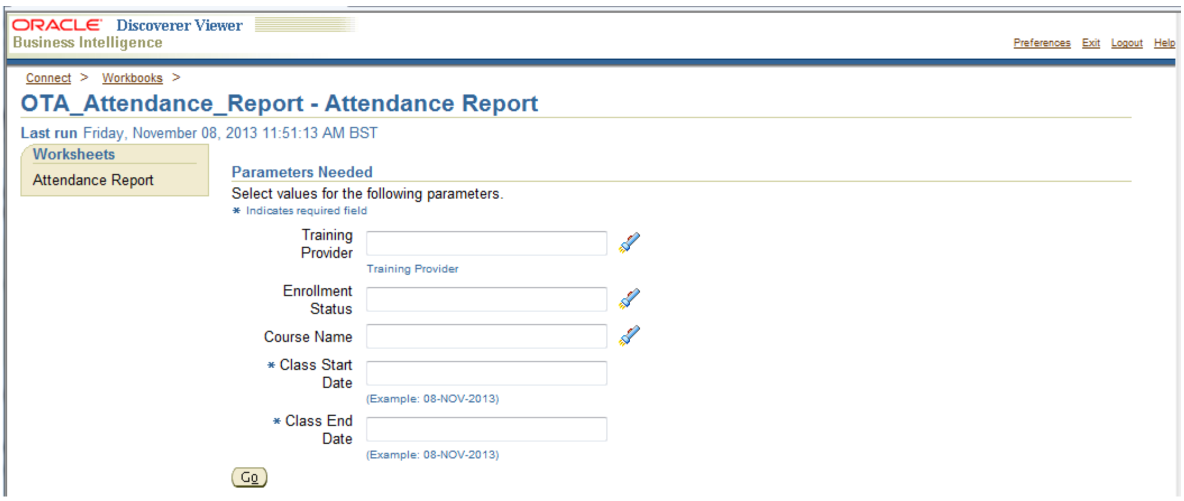


4. You will then be given a whole list of worksheets. Select the workbook you wish to run a report for e.g. Attendance list by pressing on the flag with a plus sign on it –



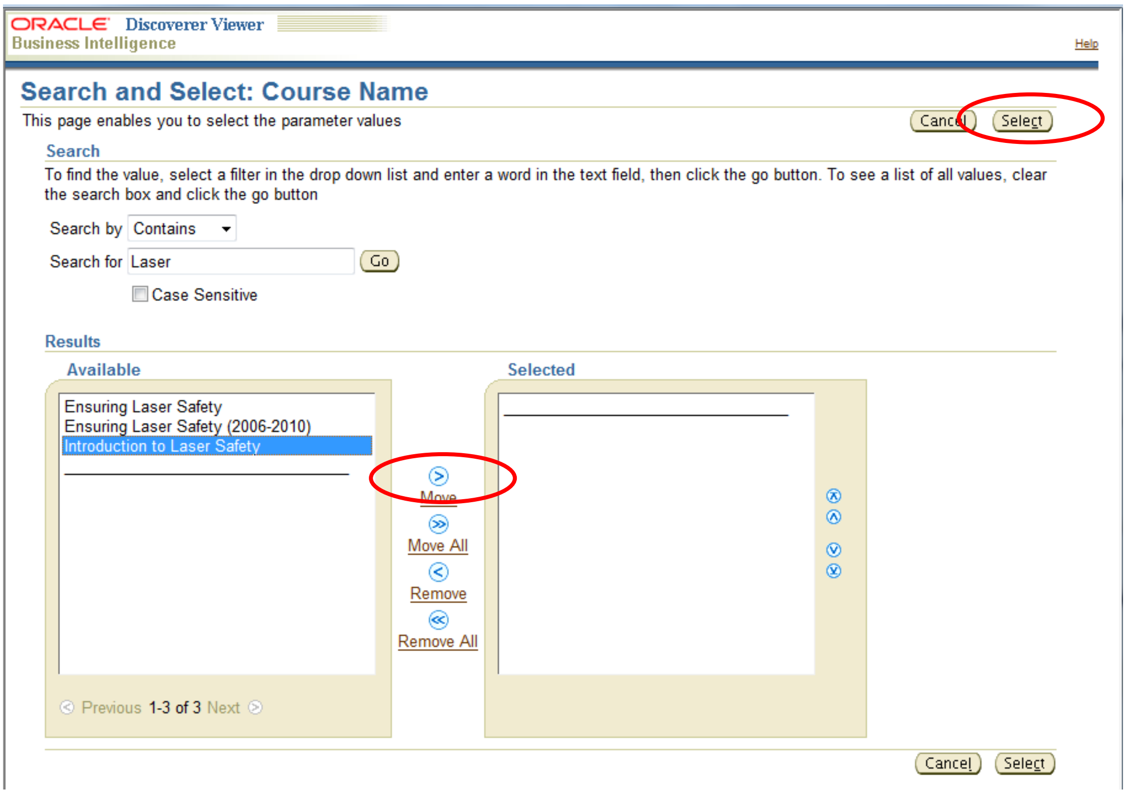
5. Select the parameters for your report on the screen shown below.



6. This will depend on the data you want. For example if you want to know which staff in Physics have attended the Introduction to Laser Safety course this academic year you would complete in the following way.

7. For course name you would select Introduction to Laser Safety.

8. Select the torch by the Course Name field and following screen will come up.



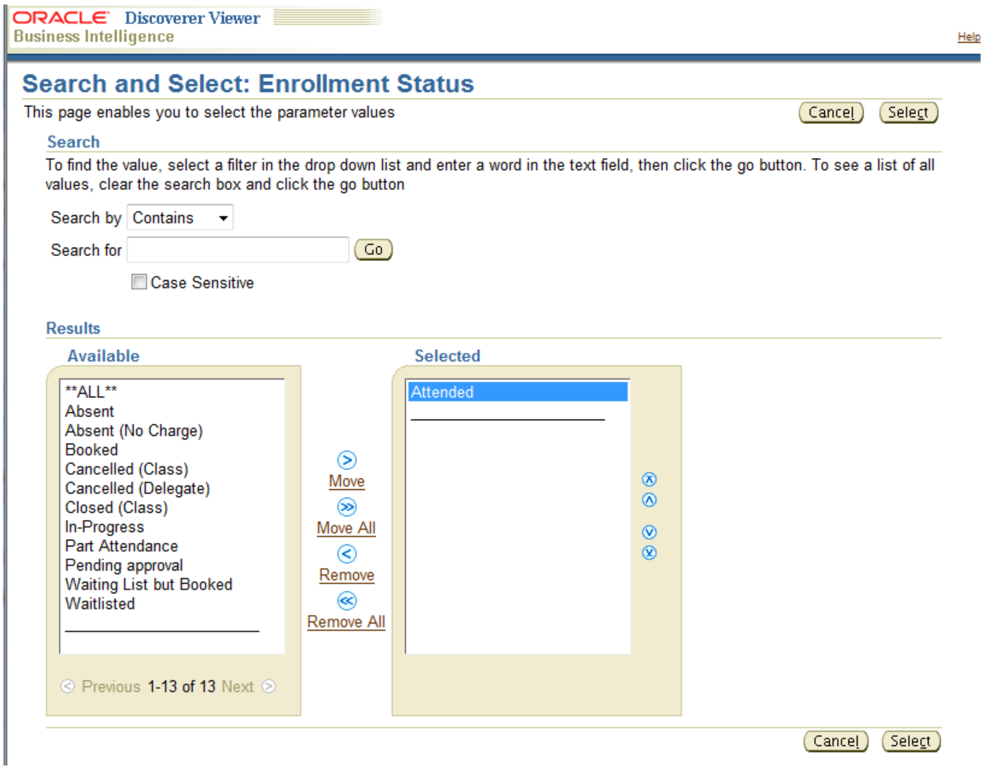
9. The Search by field gives you different options for your search, sounds like etc.

10. Search for field – enter category or you may find it easier to go to the available Results list and use first letter of category you wish to search for, select category from the list and then select the move button as circled above.

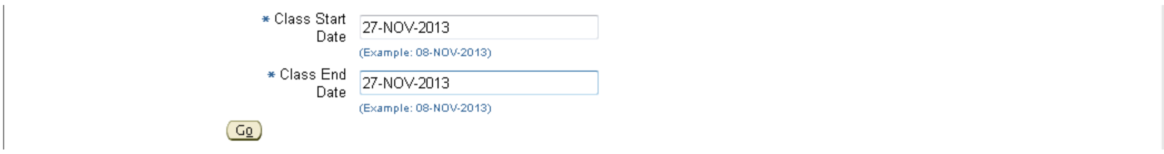
11. Press select button at bottom or top right hand of page and then you are ready to select another criteria.

12. In this example, for enrolment status, you would click on attended as you don't want to see people who are waitlisted, booked, absent etc. In other cases you may want to show people who had booked or all the staff who where absent and charged.

OLM GUIDANCE NOTES

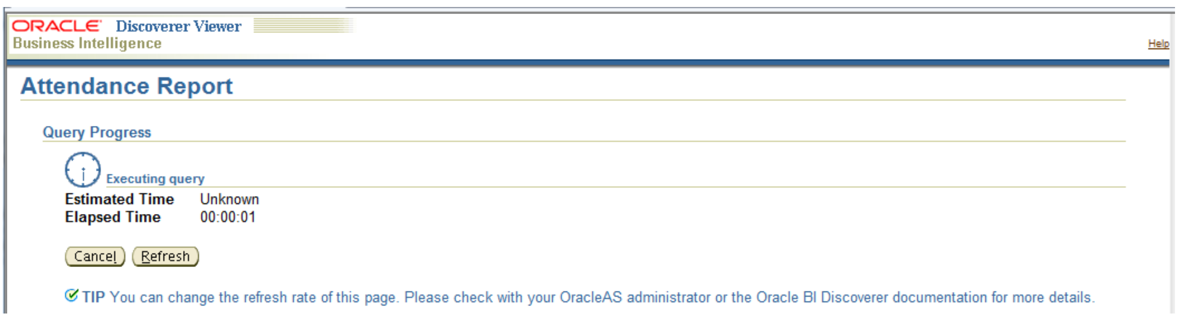


13. Type in the dates, in this case you want it for the last academic year. The dates should be in the same format as they are in ICIS i.e. 19-JUN-2013.



14. Click ‘Go’ button

15. While Discoverer is running your query the following screen appears.



16. When your data is returned you will be able to see your original parameters.

OLM GUIDANCE NOTES

Parameters

Select values for the following parameters.

* Indicates required field

Training Provider: 'Safety Training'
Training Provider

Enrollment Status: 'Attended'

Course Name: 'Introduction to Laser Safety'

* Class Start Date: '19-JUN-2013'
(Example: 08-NOV-2013)

* Class End Date: '19-JUN-2013'
(Example: 08-NOV-2013)

Go

17. Scroll down further on the page and the tabulated report will be displayed. Below gives you an example of the output. Whenever you run a report you should have an idea about what you are expecting in the output so you can be sure no mistakes have been made.

Table

Tools Layout Format Stoplight Sort Rows and Columns

Page 1 of 1

Columns 1-6 of 12 Left 6 Columns Right

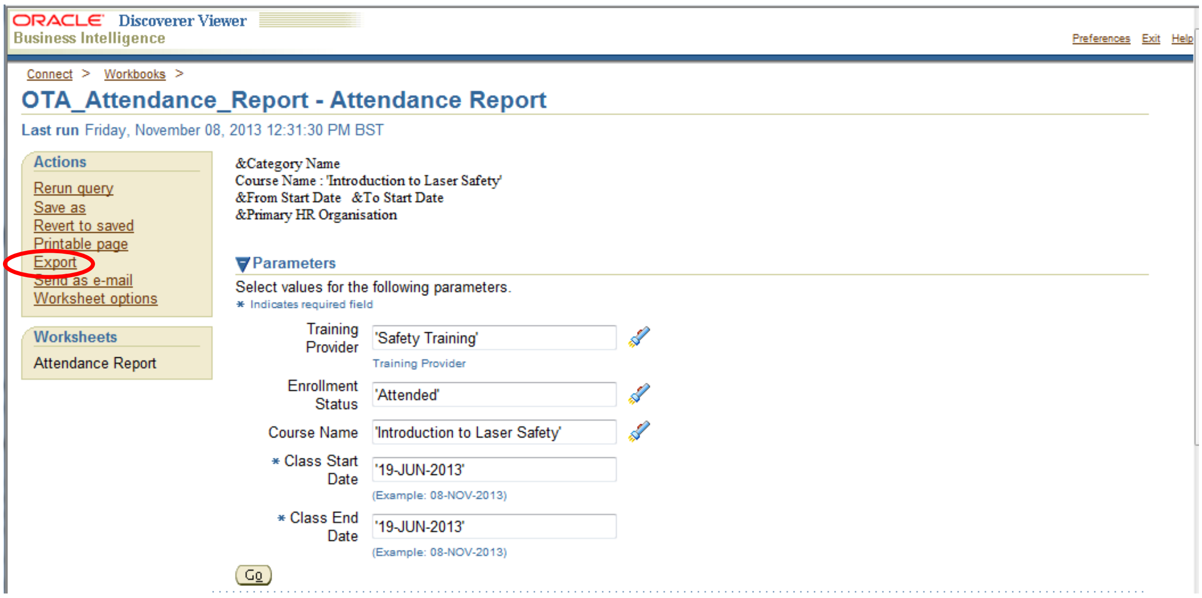
	Enrollment Number	Course	Class Start Date	Class End Date	CID	Delegate Name
1	6588730	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013		Al Lawati, Miss Sadiqa
2	6588217	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013	794191	Anfosso, Mr Andrea
3	6588320	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013		Chaurasiya, Kathy
4	6588516	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013		Chen, Mr Xi
5	6586716	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013	749668	Edelson-Averbukh, Dr Marina
6	6587638	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013		Fleischli, Franziska
7	6589007	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013		Flynn, Samuel
8	6588435	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013	616143	Gogakos, Dr Apostolos
9	6584121	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013	728544	Grothey, Miss Arnhild
10	6589008	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013		Hamlet, Oliver
11	6588812	Introduction to Laser Safety	19-JUN-2013	19-JUN-2013	162996	Hardy, Professor Katharine (Kate)

18. Further rows and columns can be viewed via the buttons at the bottom of the screen as see below.

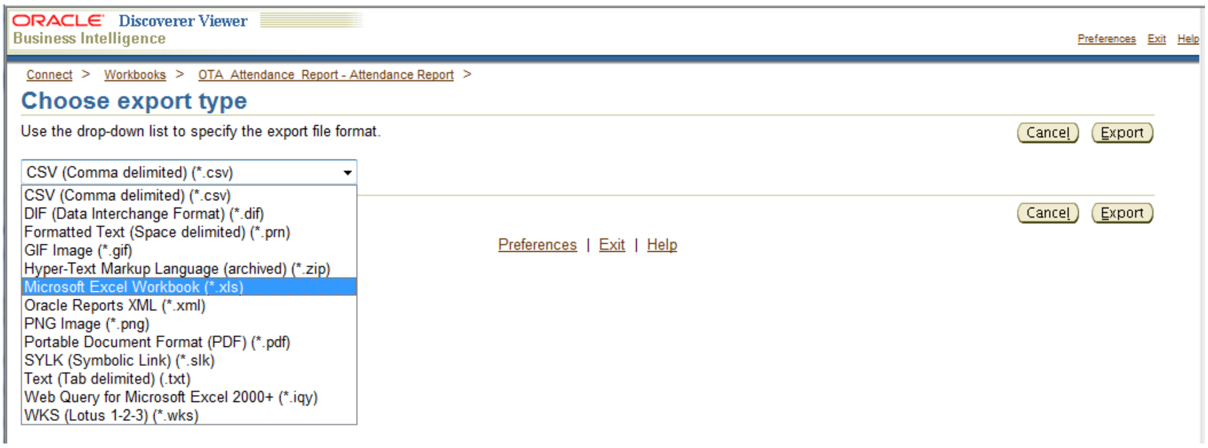
Up 25 Rows Down Rows 1-25 of 42, Columns 1-6 of 12 Left 6 Columns Right

19. This is quite difficult to view properly so it is best to simply export the data. This data can be exported to Excel quite easily by scrolling up to the top of the page and selecting the export menu at the top left of the screen.

OLM GUIDANCE NOTES

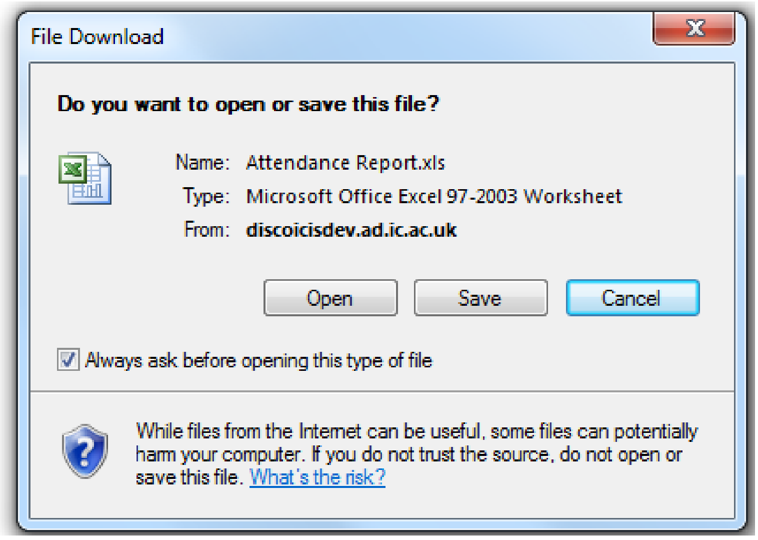


20. When you select Export you will see the following screen



21. You can leave as CSV selection but your spreadsheet will look nicer if you select Microsoft Excel Workbook and select Export button again (on right side of screen).

22. Select Click view or save. You will then get a file down load option as below.



23. Select save and you will have your report in excel to do whatever you please.

24. Alternatively you can highlight the table, copy and paste into word or excel (for more detailed instructions see the SDU Participant List chapter).

Note: The information gathered and exported from this report should be kept confidential and therefore please be careful which drive you export the data to.