

TR3 – Managing course bookings

You can create training requests for a course whether or not there are scheduled courses, so individuals are either booked a place or added to the waiting list for the next event.

In order to be able to book people on to a course, you must first have set-up a scheduled course (refer to **QRG: TR3 Scheduling a Course** for further details of how to do this). You should always check the waiting list first, before booking anyone else on the course.

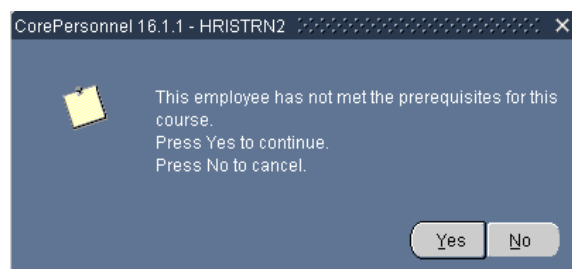
This guide covers the following process steps:


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Navigate to: Personnel > Training > Maintenance > Scheduled courses > Candidates

Warning Messages

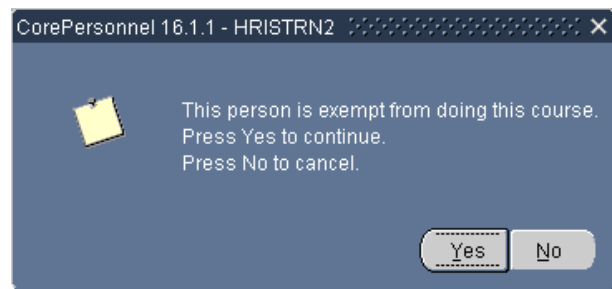
If a participant hasn't met the specified pre-requisites for a course, the following message will be displayed. You can either click on *Yes* to book them on to the course, or *No* if you do not want to book them on this course.



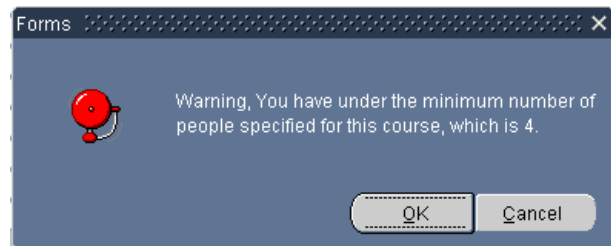
 **Note:** To check someone's training history and bookings, navigate to Personnel > Training > Maintenance > Training History and enter or search for their Personnel No.


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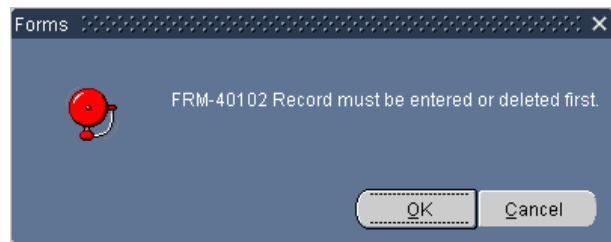
When you book someone on to a course and they are exempt from attending this course because they have previously completed a similar course or have attained specific qualifications, the following warning message will be displayed. Click **Yes** to enable them to book on the course, or **No** if you do not want to book them on this course



When working with the waiting list and booking list the following message may appear to warn you that you have not met the minimum number of candidates for this course.



If you add a new blank line in to the list of candidates and try and navigate away from this screen, you may see the following message. You will need to remove the blank line; to do this highlight the blank line, and then click on .

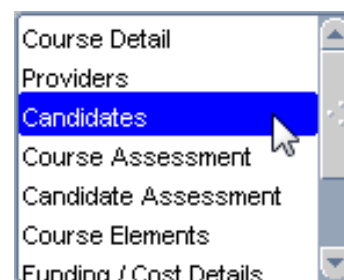


Book People on to a Course

Core HR holds all current and past employees since April 2001, when booking people on courses you will only be able to select current employees. University College employees are held on the system as External candidates, as they are not part of the University personnel and payroll modules.

Navigate to: Personnel > Training > Maintenance > Scheduled courses

1. Search for the course, and double click to open up the scheduled course you want to book people on to.
2. Go to the **Select Detail** box, and select **Candidates**.



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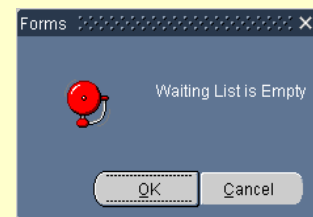
Note: If there are no candidates booked on a course, the following message will be displayed.



- You should always check the waiting list first, before booking anyone else on the course. Click on



Note: If there is nobody on the waiting list the following message will be displayed.



- The *Waiting List* screen is displayed. The people who have a status of *Requested* are waiting to attend this course. Review the information in the *Priority, Date Input/Time* and *Training Reason* to identify people who need to attend the training course.

To book someone on to the course, tick the **Selected** box next to their name (their status will change to *Scheduled*) and then click on to update and return to the *Course Candidates* screen which shows you the booking list.

Personnel No	Name	Selected	Request Date	Status	Priority	Date Input/Time	Shift Type	Required By Date	Training Reason
2211559	FRANCES BLACKWELL	<input type="checkbox"/>	17-AUG-2012	Requested	High	17-AUG-2012 15:53		1	MA
2206716	MICHELLE GRANGE	<input type="checkbox"/>	17-AUG-2012	Requested	Medium	17-AUG-2012 15:54		3	MA
2201302	RAY OMAR	<input checked="" type="checkbox"/>	17-AUG-2012	Scheduled	Medium	17-AUG-2012 15:55		4	NEV
2019600	BOBBI BALL	<input type="checkbox"/>	17-AUG-2012	Requested	Low	17-AUG-2012 15:52		2	EMF
2016884	PAUL KEMP	<input checked="" type="checkbox"/>	17-AUG-2012	Scheduled	High	17-AUG-2012 15:54		3	MA
		<input type="checkbox"/>							
		<input type="checkbox"/>							
		<input type="checkbox"/>							
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- Within the *Course Candidates* screen, select a new blank row.

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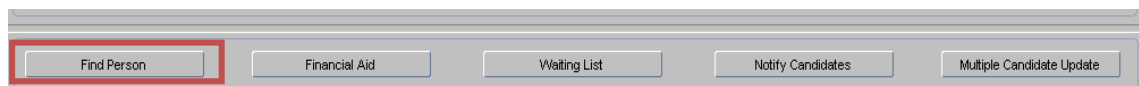
Note: If there isn't a blank row at the end of your list, scroll down to the bottom of the list, and then press the down arrow on your keyboard or click on to add a new line.

- 6. In the Personnel No field, enter the Personnel number if known or use the button or F9 to select from a list or you can complete a Find Person search.

Personnel No	NI number	Name	Selected	Accepted	Pass	Training Status	Priority	Authorised	
1276217		TOM HARRIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled	High	<input type="checkbox"/>	1
2202316		TROY WRIGHT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled	High	<input type="checkbox"/>	2
2206716		MICHELLE ORANGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled	High	<input type="checkbox"/>	1
2210522		DANIEL JONES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled	High	<input type="checkbox"/>	3
2211954		ISOBEL JAMES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled	High	<input type="checkbox"/>	3
			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled		<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
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			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	

Find Person Search

Click on the **Find Person** button at the bottom of the Candidates screen. The Find Person Search screen will appear.



Find Person Search screen

Find Person

Find Person

Personnel No:

Name:

Email Address:

Department:

Status:

IDSSO:

Personnel No	Name	Department	
2018939	RICHARD COLEMAN	IT SERVICES	Select
2207847	ROBERT COLEMAN	PERSONNEL SERVICES	Select
2212193	RACHEL COLEMAN	IT SERVICES	Select
			Select
			Select
			Select

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Enter search criteria e.g. Name (Surname followed by first initial), Personnel No, Department, E-mail Address, IDSSO (Oxford Single Sign On). Click

Select the correct person from the list shown and click . The person's details will then be pulled into the Candidate view to enable a booking.

Note: Find Person Facility can also be found in the following locations:



Personnel > Training > Enquiries > Outstanding Training
Personnel > Training > Maintenance > Scheduled Courses > Candidates
Personnel > Training > Maintenance > Employee Training Requests
Personnel > Training > Enquiries > Training Requests

1. Enter the **Priority** and **Training Reason** information.
2. Save the information: either click  or press **F10** button.
3. An automatic email notification will be sent to a 'Scheduled' candidate to confirm their place and details of the scheduled course.

Use Automatic Email Notifications

There are five automatic email notifications that can be configured to send to training candidates based on the following training rules.

1. Wait list confirmation email – send to employee or external candidate when linked to a course code with a training status of RE- Requested
2. Course Place confirmation email – send to employee or external candidate when linked to a scheduled course with a training status of SCH – Scheduled.
3. Course Reminder - send to employee or external candidate 3 days prior to scheduled course start date.
4. Course Reminder – send to Provider with a checklist of actions 5 days prior to the schedule course start date.
5. No show – send to employees or external candidates after the schedule course has taken place and when training status for each person is updated to FTSN – Failed to Show (no request) or FTS2 – Failed to Show (create request).

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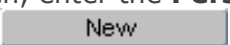
Note: A notification can be resent if required by changing the candidate training status to Partially Complete and saving the change of status and then changing the training status back to the required status to trigger another email notification.

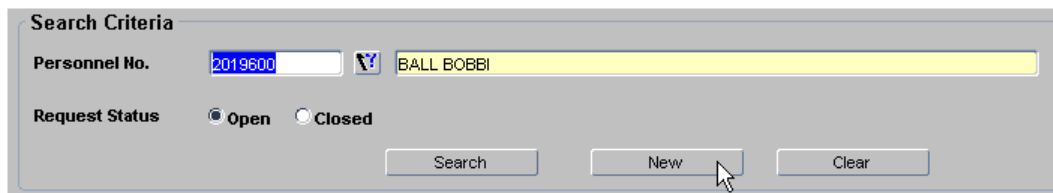
Each notification has its own template that is configured to each providers requirements for each of the above notification rules. The limit of characters is set to 2000 maximum for each template. For any changes to the templates please contact HR Systems Support (hr.systems@admin.ox.ac.uk)

Book People on to a Waiting List

You can book people on to a waiting list when the scheduled courses are full, when people are unable to attend any of the scheduled course dates or when there are no scheduled courses.


Personnel > Training > Maintenance > Employee Training Requests



1. In the *Maintain Employee Training Requests* screen, enter the **Personnel Number/External Reference** and then click on .



2. In the *Training Request* screen, enter the **Course Code**. The *Request Date* is automatically populated to today's date and the *Status* is set to *Requested*.
3. Enter the **Priority** and **Training Reason**, and if you know it the **Required By Date**.

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4. Save the information: either click  or press **F10** button.
5. An automatic email notification will be sent to a 'Requested' candidate to confirm they are on the waiting list of the course.

 **Note:** To remove a training request navigate to Personnel > Training > Maintenance > Employee Training Requests, search for the employee's training requests. Select the training request you wish to remove from the list, and click on .

Cancel Bookings

If someone wants to cancel their booking, then you need to set their status to either *Candidate Cancelled (Create Request)* if they would like to book on a future scheduled course, or *Candidate Cancelled (No Request)* if they do not need to attend the course in the future.

If you do not know the date of the course they wish to cancel from, you can check this in their Training History.

 **Note:** Navigate to: Personnel > Training > Maintenance > Scheduled courses, and select the course from the list, then follow the instructions below from point 4.

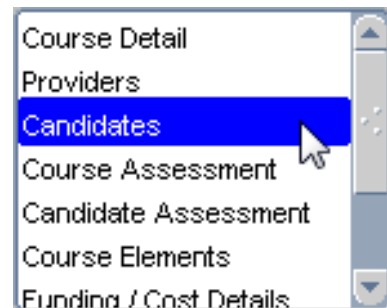
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Navigate to: Personnel > Training > Maintenance > Training History

- In the *Training History Details* screen, enter the **Personnel No/External Reference**, or click on or press **F9** to select from a list.
- In the list of courses, select the course you want to cancel the booking for and then click on .

Start Date	End Date	Status	Course	Training Type	Category Description	Score	Revision Date
01-OCT-2012	01-OCT-2012	Scheduled	ACCFUND	Scheduled	IT & TECHNICAL SKILLS		
21-AUG-2012		Requested	MIN_AG1	Scheduled	STAFF DEVELOPMENT		

- You are taken to the *Maintain Scheduled Course* screen for the date/time that person is booked on.
- Go to the **Select Detail** box, and select **Candidates**.

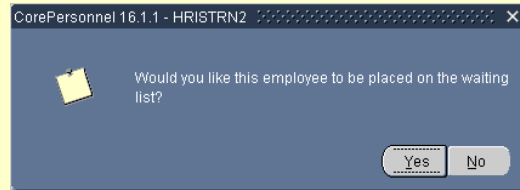



- Find the person you need to cancel in the list, and change their status to either **Candidate Cancelled (Create Request)** or **Candidate Cancelled (No Request)**.

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Note: If you choose to create a request, the following message will appear. Click Yes to add someone to the waiting list.



6. Save the information: either click  or press **F10** button.
7. You can now check the waiting list to see if anyone can be promoted on to this course. Refer to the 'Book People onto a Course' section earlier in this guide for details of how to do this.

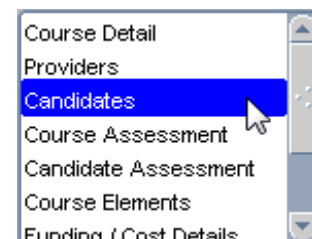
Add Notes on Individuals

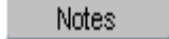
If you need to note that someone has special dietary, access or other requirements, you can do this using the notes field on a person's booking. Please note that this information is only held on that particular booking and is not stored on their personnel record or retained for when they next book on to a course.

Navigate to: Personnel > Training > Maintenance > Scheduled courses


1. Search for the course, and double click to open up the scheduled course you want to book people on to.

2. Go to the **Select Detail** box, and select **Candidates**.



3. Scroll to the right of list, and click on the  button for the person you want to add notes for.

4. The *Notes* screen is displayed. Enter your notes, and then click on .

5. Save the information: either click  or press **F10** button.



Note: To view all of the comments for a particular scheduled course, run the Participants List (Provider Check) Discoverer report. Refer to **QRG: TR8 Discoverer Reports**.