

# Catalogue Housekeeping

 September 2018  
It's your **ESR**

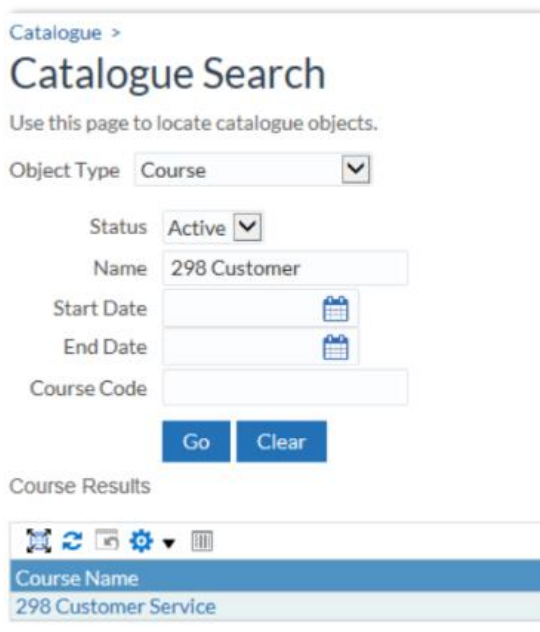
## Introduction

End dating courses and closing classes that have been completed ensures that these will not be returned in the default searches used by administrators. This means that they can readily access the courses and classes that require action on their part.

## Catalogue Search

By default the search will only return Courses, Learning Certifications and Learning Paths which are active.

No End Date or End Date in the future



The screenshot shows the 'Catalogue Search' interface. At the top, there is a breadcrumb 'Catalogue >' and the title 'Catalogue Search'. Below the title is the instruction 'Use this page to locate catalogue objects.' The search form includes several fields: 'Object Type' (set to 'Course'), 'Status' (set to 'Active'), 'Name' (containing '298 Customer'), 'Start Date' (with a calendar icon), 'End Date' (with a calendar icon), and 'Course Code'. There are 'Go' and 'Clear' buttons below the form. Under the 'Course Results' section, there is a table with one row: '298 Customer Service'.

Course Name
298 Customer Service

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## Class Search

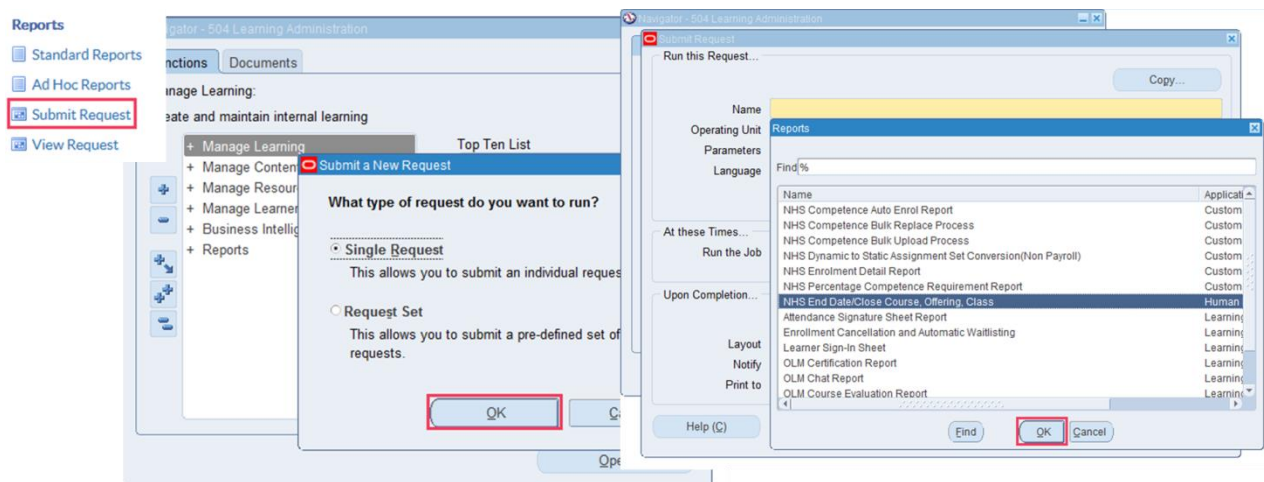
By default the Class search will only return Classes with a status of Normal

## Best Practice

- To ensure that search results returned are restricted to courses, offering and classes which are still active and require action:
  - End date Catalogue items that are no longer active
  - Close Classes where enrolments have been updated.
- To assist organisations with these tasks it is possible to bulk end date Courses, Offerings and Classes.

## End Date/Close Course, Offering, Class

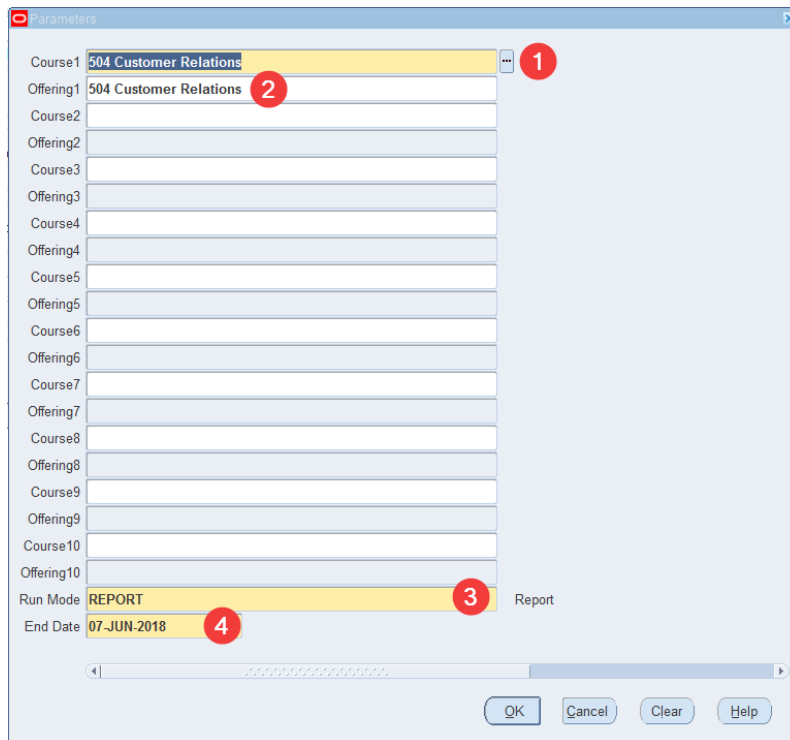
Use the process NHS End Date/Close Course, Offering, Class



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## Parameters



Fields in Yellow are mandatory and must have values.

1. End date up to 10 Courses
2. Can also select an individual offering within a course. If an offering is not selected then all offerings in a course will be end dated
3. Two run modes, Report and Execute

Report – View the changes that will be made with selected settings before they are applied in ESR.

Execute - End date the applicable Courses, Offerings and Classes in ESR

Always run the Process in Report mode first to see what changes will be applied.

4. This is the date the applicable Courses, Offerings and Classes will be end dated

Once parameters have been entered, click OK.

Click Submit

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**Clicking in the Parameters field will allow you to change the Parameters before submitting**

**Submit Request**

Run this Request... Copy...

Name: NHS End Date/Close Course, Offering, Class

Operating Unit:

Parameters: 504 Customer Relations:504 Customer Relations:.....REPORT:14-JUN-2018

Language: American English

Language Settings... Debug Options

At these Times...  
Run the Job: As Soon as Possible Schedule...

Upon Completion...  
 Save all Output Files  Byrst Output

Layout: Options...

Notify:

Print to: noprint

Help (C) Submit Cancel

Once the Process has Completed, click View Output

**Requests**

Refresh Data Find Requests Submit a New Request... Submit New Request Set...

Auto Refresh (K) Copy Single Request Copy Request Set...

Request ID	Name	Parent	Phase	Status	Parameters
2694038	NHS End Date/Close Cours		Completed	Normal	17334, 17112, .....
2692779	Process Bulk Enrollments		Completed	Normal	172,
2691279	NHS End Date/Close Cours		Completed	Normal	17334, 17112, .....
2691229	NHS End Date/Close Cours		Completed	Normal	17334, 17112, .....

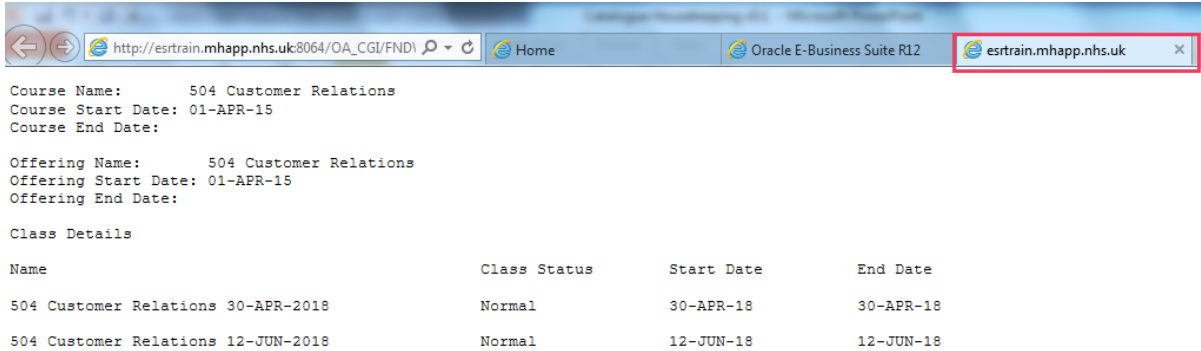
Hold Request View Details... Regrn Request View Output

Cancel Request Diagnostics View Log... (J)

Output will open in a new tab

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Course Name: 504 Customer Relations  
Course Start Date: 01-APR-15  
Course End Date:

Offering Name: 504 Customer Relations  
Offering Start Date: 01-APR-15  
Offering End Date:

Class Details

Name	Class Status	Start Date	End Date
504 Customer Relations 30-APR-2018	Normal	30-APR-18	30-APR-18
504 Customer Relations 12-JUN-2018	Normal	12-JUN-18	12-JUN-18

## Rules

- Will not end date any Courses/Offerings or end date or close Classes if the End Date parameter is before the start date of any of the classes.
- Will only update a Class status and/or end date where the end date is either NULL or prior to the end date defined in the parameters
- Class Status will be changed to Closed where the Class End Date is already entered.
- The End Date parameter value will be the end date applied to the Course, Offering(s) and Class End Dates (where this has not been entered)

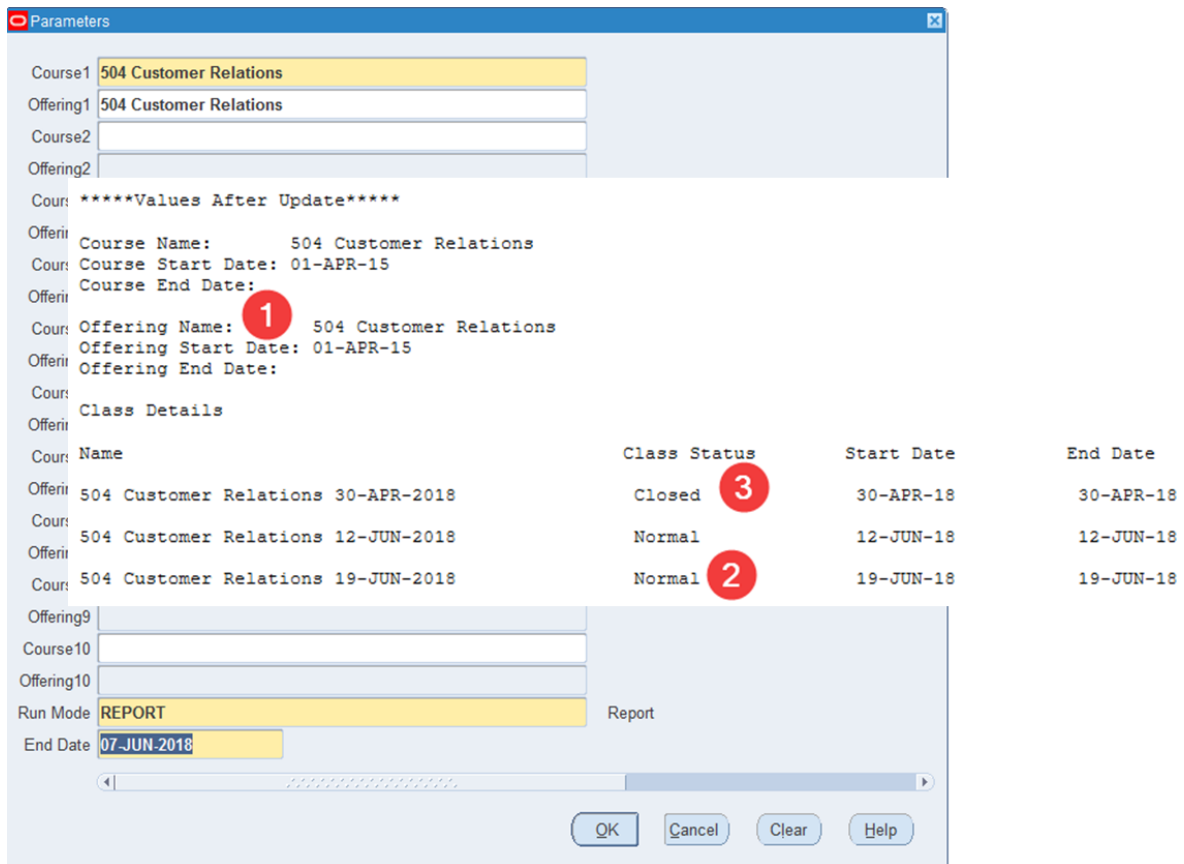
**Note - The enrolment status of learners on a Class will not prevent a Class status from being updated to Closed.**

**The enrolment end date entered against a class has no impact on the whether a class is closed or not.**

# Catalogue Housekeeping

## Example 1

- Will not end date any Courses/Offerings or end date or close Classes if the End Date parameter is before the start date of any of the classes.
- Class Status will be changed to Closed where the Class End Date is already entered



Parameters

Course1 504 Customer Relations  
Offering1 504 Customer Relations  
Course2  
Offering2

Cour: \*\*\*\*\*Values After Update\*\*\*\*\*  
Offeri Course Name: 504 Customer Relations  
Cour: Course Start Date: 01-APR-15  
Offeri Course End Date:  
Cour: Offering Name: 1 504 Customer Relations  
Offeri Offering Start Date: 01-APR-15  
Offeri Offering End Date:  
Cour:  
Offeri Class Details

Name	Class Status	Start Date	End Date
504 Customer Relations 30-APR-2018	Closed 3	30-APR-18	30-APR-18
504 Customer Relations 12-JUN-2018	Normal	12-JUN-18	12-JUN-18
504 Customer Relations 19-JUN-2018	Normal 2	19-JUN-18	19-JUN-18

Offering9  
Course10  
Offering10  
Run Mode REPORT Report  
End Date 07-JUN-2018

OK Cancel Clear Help

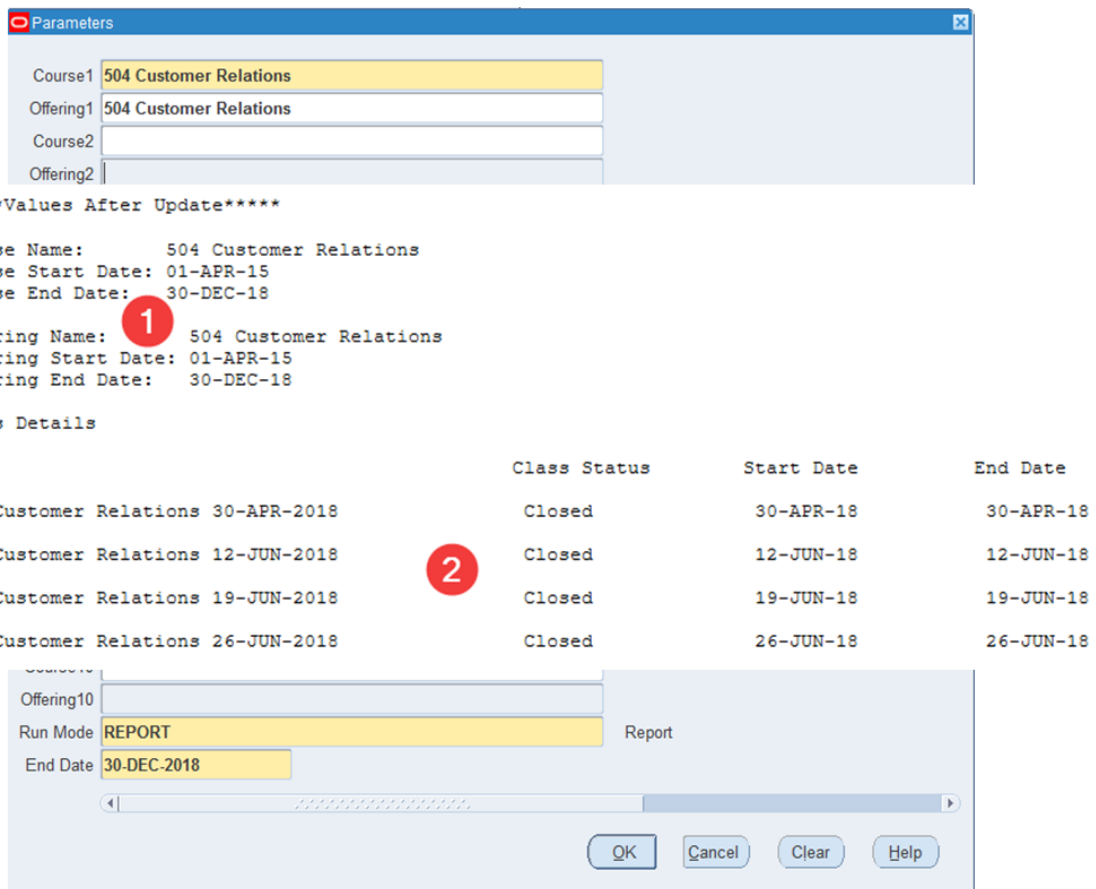
The parameter End Date is 07-JUN-2018, there are classes with an start date after the parameter value

- 1 - Report shows that the Course and Offering are not end dated.
- 2 - Classes with Start Date after 07-JUN-2018 are not changed
- 3 - Class with End Date before 07-JUN-2018 has Status changed to Closed

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## Example 2

- The End Date parameter value will be the end date applied to the Course, Offering(s) and Class End Dates (where this has not been entered)



The screenshot shows a 'Parameters' dialog box with the following fields:

- Course1: 504 Customer Relations
- Offering1: 504 Customer Relations
- Course2: (empty)
- Offering2: (empty)

Below the dialog box, the output shows the following values after update:

```

*****Values After Update*****
Course Name:      504 Customer Relations
Course Start Date: 01-APR-15
Course End Date:  30-DEC-18
Offering Name:    1 504 Customer Relations
Offering Start Date: 01-APR-15
Offering End Date: 30-DEC-18
  
```

The 'Class Details' table shows the following data:

Name	Class Status	Start Date	End Date
504 Customer Relations 30-APR-2018	Closed	30-APR-18	30-APR-18
504 Customer Relations 12-JUN-2018	2 Closed	12-JUN-18	12-JUN-18
504 Customer Relations 19-JUN-2018	Closed	19-JUN-18	19-JUN-18
504 Customer Relations 26-JUN-2018	Closed	26-JUN-18	26-JUN-18

The bottom part of the screenshot shows a 'Report' dialog box with the following fields:

- Offering10: (empty)
- Run Mode: REPORT
- End Date: 30-DEC-2018

Buttons: OK, Cancel, Clear, Help

The parameter End Date is 30-DEC-2018, there no classes with an start date after the parameter value

- 1 - Report shows that the Course and Offering are end dated.
- 2 - Classes with End Date before 30-DEC-2018 have Status changed to Closed

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## Example 3

- Will only update a Class status and/or end date where the end date is either NULL or prior to the end date defined in the parameters

Class ^	Info	Class Status	Start Date ^	End Date ^
504 Electronic Prescriptions in Urgent Care		Normal	19-Apr-2018	

**Parameters**

Course1: 504 Electronic Prescriptions in Urgent Care

Offering1:

Course2:

Offering2:

Course3:

\*\*\*\*\*Values After Update\*\*\*\*\*

Course Name: 504 Electronic Prescriptions in Urgent Care  
 Course Start Date: 19-APR-18  
 Course End Date: 14-JUN-18

Offering Name: 504 Electronic Prescriptions in Urgent Care  
 Offering Start Date: 19-APR-18  
 Offering End Date: 14-JUN-18

Class Details

Name	Class Status	Start Date	End Date
504 Electronic Prescriptions in Urgent Care	Closed	19-APR-18	14-JUN-18

Course8:

Offering8:

Course9:

Offering9:

Course10:

Offering10:

Run Mode: REPORT Report

End Date: 14-JUN-2018

OK Cancel Clear Help

Class has no End Date

The parameter End Date is 14-DEC-2018, there no classes with an start date after the parameter value

1 - Report shows that the Course and Offering are end dated.

2 - Classes is End Dated and Closed

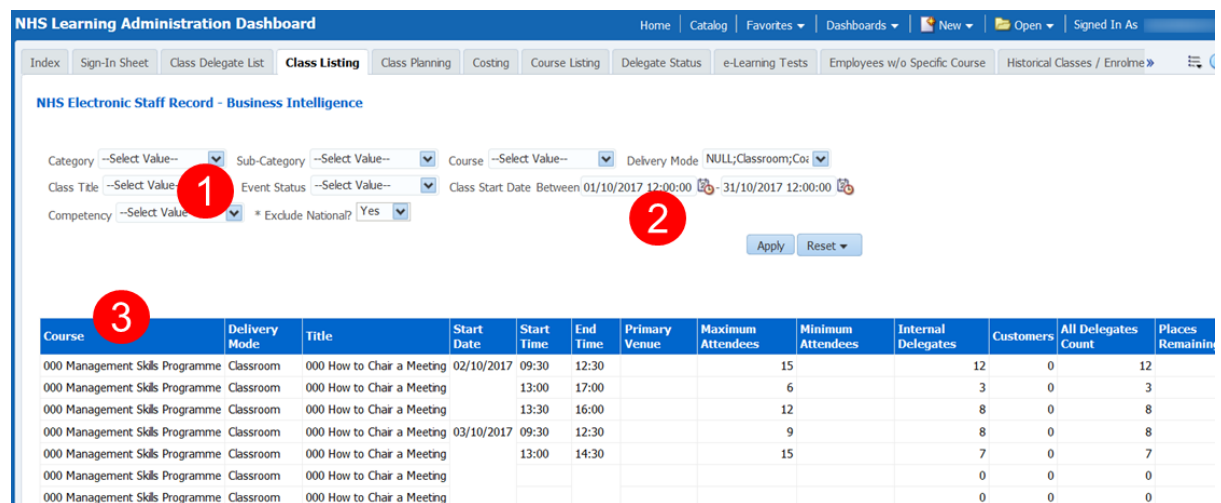


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## ESR BI Reports Class Listing

Classes that do not have a status of closed can be identified by using the Class Listing Analysis in the Learning Administration Dashboard.



**NHS Learning Administration Dashboard**

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As

Index | Sign-In Sheet | Class Delegate List | **Class Listing** | Class Planning | Costing | Course Listing | Delegate Status | e-Learning Tests | Employees w/o Specific Course | Historical Classes / Enrolme

**NHS Electronic Staff Record - Business Intelligence**

Category --Select Value-- Sub-Category --Select Value-- Course --Select Value-- Delivery Mode NULL;Classroom;Cot

Class Title --Select Value-- Event Status --Select Value-- Class Start Date Between 01/10/2017 12:00:00 - 31/10/2017 12:00:00

Competency --Select Value-- \* Exclude National? Yes

Apply Reset

Course	Delivery Mode	Title	Start Date	Start Time	End Time	Primary Venue	Maximum Attendees	Minimum Attendees	Internal Delegates	Customers	All Delegates Count	Places Remaining
000 Management Skills Programme	Classroom	000 How to Chair a Meeting	02/10/2017	09:30	12:30			15		12	0	12
000 Management Skills Programme	Classroom	000 How to Chair a Meeting		13:00	17:00			6		3	0	3
000 Management Skills Programme	Classroom	000 How to Chair a Meeting		13:30	16:00			12		8	0	8
000 Management Skills Programme	Classroom	000 How to Chair a Meeting	03/10/2017	09:30	12:30			9		8	0	8
000 Management Skills Programme	Classroom	000 How to Chair a Meeting		13:00	14:30			15		7	0	7
000 Management Skills Programme	Classroom	000 How to Chair a Meeting								0	0	0
000 Management Skills Programme	Classroom	000 How to Chair a Meeting								0	0	0

1. Select Status – Full, Normal, Planned
2. Choose Date Range
3. Identify Courses which need closing
4. Run the NHS End Date/Close Course, Offering, Class Process

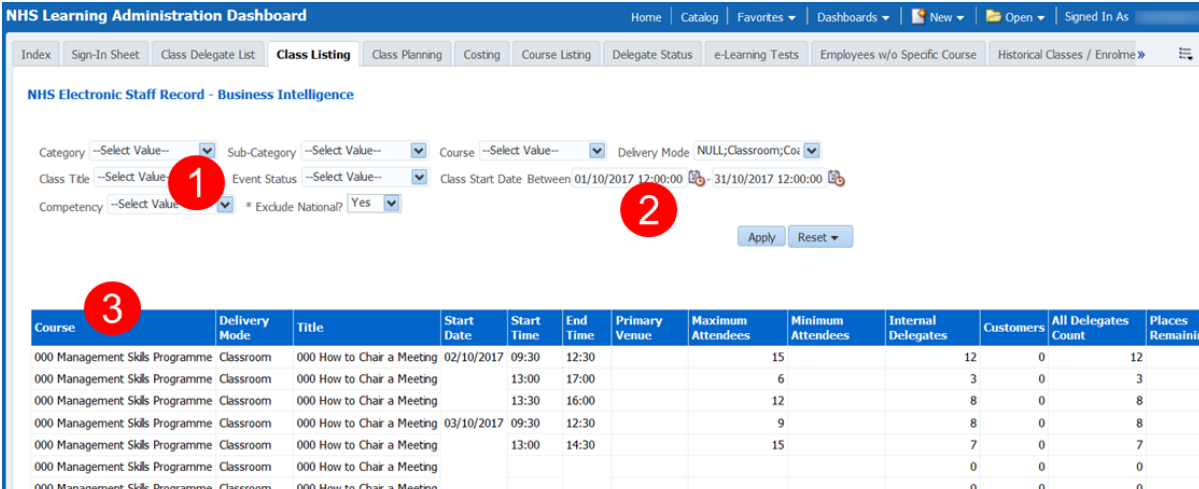
If the courses are still active, only the classes with an End Date which is less than the End Date parameter in the Process will be Closed.

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## Course Listing

To identify Courses which have not had any classes run within a defined period, suggesting that these courses can be end dated. Use the Course Listing Analysis in the Learning Administration Dashboard.



**NHS Learning Administration Dashboard**

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As

Index | Sign-In Sheet | Class Delegate List | **Class Listing** | Class Planning | Costing | Course Listing | Delegate Status | e-Learning Tests | Employees w/o Specific Course | Historical Classes / Enrolme

**NHS Electronic Staff Record - Business Intelligence**

Category --Select Value-- Sub-Category --Select Value-- Course --Select Value-- Delivery Mode NULL;Classroom;Co

Class Title --Select Value-- **1** Event Status --Select Value-- Class Start Date Between 01/10/2017 12:00:00 **2** - 31/10/2017 12:00:00

Competency --Select Value-- \* Exclude National? Yes

Apply Reset

<b>3</b> Course	Delivery Mode	Title	Start Date	Start Time	End Time	Primary Venue	Maximum Attendees	Minimum Attendees	Internal Delegates	Customers	All Delegates Count	Places Remaining
000 Management Skills Programme	Classroom	000 How to Chair a Meeting	02/10/2017	09:30	12:30		15	15	12	0	12	
000 Management Skills Programme	Classroom	000 How to Chair a Meeting		13:00	17:00		6	6	3	0	3	
000 Management Skills Programme	Classroom	000 How to Chair a Meeting		13:30	16:00		12	12	8	0	8	
000 Management Skills Programme	Classroom	000 How to Chair a Meeting	03/10/2017	09:30	12:30		9	9	8	0	8	
000 Management Skills Programme	Classroom	000 How to Chair a Meeting		13:00	14:30		15	15	7	0	7	
000 Management Skills Programme	Classroom	000 How to Chair a Meeting							0	0	0	
000 Management Skills Programme	Classroom	000 How to Chair a Meeting							0	0	0	

1. Show only Courses with no Classes within period
2. Choose Date Range
3. Identify Courses which need closing
4. Run the NHS End Date/Close Course, Offering, Class Process