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Catalogue Housekeeping

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

Catalogue >		
Catalog	ue Search	
Use this page to	locate catalogue objects.	
Object Type C	ourse 🗸	
Status	Active 🔽	
Name	298 Customer	
Start Date		
End Date	#	
Course Code		
	Go Clear	
Course Results	· · · · · · · · · · · · · · · · · · ·	
1 2 5 0	-	
Course Name		
298 Customer S	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 - End date Catalogue items that are no longer active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

Reports	igator - 504 Learning Adr	ministration	Navigator - 504 Learning Ad	Iministration	
Standard Reports	nctions Documents		Run this Request		
Ad Hoc Reports	inage Learning:			c	copy
📧 Submit Request	eate and maintain intern	al learning	Name		
📧 View Request	+ Manage Learning	Top Ten List	Operating Unit Parameters	Reports	×
		Submit a New Request	Language	Find[%	
	+ Manage Resour + Manage Learner	What type of request do you want to run?		Name NHS Competence Auto Enrol Report	Applicati * Custom
	+ Business Intellig + Reports	• Single Request	At these Times Run the Job	NHS Competence Bulk Replace Process NHS Competence Bulk Upload Process	Custom Custom
	**	This allows you to submit an individual reques	Run the Job	NHS Dynamic to Static Assignment Set Conversion(Non Payroll) NHS Enrolment Detail Report	Custom Custom
	+ ⁴	C Request Set	Upon Completion	NHS Percentage Competence Requirement Report NHS End Date/Close Course, Offering, Class	Custom Human
	2	This allows you to submit a pre-defined set of requests.	Layout Notify	Aftendance Signature Sheet Report Enrollment Cancellation and Automatic Waitlisting Learner Sign-In Sheet OLM Certification Report OLM Chat Report	Learning Learning Learning Learning Learning
		QK Q	Help (<u>C</u>)	OLM Course Evaluation Report	Learnin(*
		Qpŧ			

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Parameters

O Paramete	rs	×
Course1	504 Customer Relations	- 6
	504 Customer Relations 2	
Course2		
Offering2		
Course3		
Offering3		
Course4		
Offering4		
Course5		
Offering5		
Course6		
Offering6		
Course7		
Offering7		
Course8		
Offering8		
Course9		
Offering9		
Course10		
Offering10		
Run Mode		Report
End Date	07-JUN-2018 4	
	• • • • • • • • • • • • • • • • • • •	
		Þ
	(OK Clear Help

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	
Layout	Qptions	
Notify		
Print to	noprint	
Help (<u>C</u>)	Sub <u>m</u> it Ca <u>n</u> cel	

Once the Process has Completed, click View Output

	(
Ref	resh Data	Find Re	equests	Submit	a New Request	. Submit New Request Set
Auto Re	efresh (<u>K)</u>				y Single Request	Copy Reguest Set
Request ID)		Parent			
	Name			Phase	Status	Parameters
2694038	NHS End Date	Close Cours		Completed	Normal	17334, 17112, , , , , , , , , , , , , , , , , ,
2692779	Process Bulk E	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	d Request	Viev	v Details		Rerun Request	View Output
Canc	el Request	Dia	ignostics			View Log (J)

Output will open in a new tab

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				Llt's	your ESR
() () () http://esrtrain.mhapp.nhs.uk:8064/OA_CGI/FND\ / - C	2 🙆 Home	C Oracle E-Busin	ess Suite R12	🤗 esrtrain.mhapp.nhs.uk	<
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.

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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

O Parameters		×	
Course1 504 Customer Relations			
Offering1 504 Customer Relations			
Course2]		
Offering2			
Cour: *****Values After Update****			
Offeni Course Name: 504 Customer Relations Course Start Date: 01-APR-15 Course End Date:			
Cour: Offering Name: 504 Customer Relations Offering Start Date: 01-APR-15 Offering End Date:			
Cours Class Details Offern			
Cour: Name	Class Status	Start Date	End Date
Offerin 504 Customer Relations 30-APR-2018	Closed 3	30-APR-18	30-APR-18
Court 504 Customer Relations 12-JUN-2018	Normal	12-JUN-18	12-JUN-18
Offeri Cour: 504 Customer Relations 19-JUN-2018	Normal 2	19-JUN-18	19-JUN-18
Offering9			
Course10]		
Offering10	1		
Run Mode REPORT	Report		
End Date 07-JUN-2018			
(•		D	
(QK Clear	r <u>H</u> elp	

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)

	🗢 Paramete	rs					×	
	Course1	504 Customer Relations						
		504 Customer Relations						
	Course2	[
	Offering2				ĺ			
*****	0	fter Update****						
Course Course Offeri Offeri	e End Da ing Name ing Star	504 Custome Date: 01-APR-15 te: 30-DEC-18 : 504 Custo t Date: 01-APR-15 Date: 30-DEC-18	mer Relations					
Class	Details							
Name				Class St	atus	Start Date	E	End Date
504 Ci	ustomer	Relations 30-APR-	2018	Closed		30-APR-18		30-APR-18
504 Ci	ustomer	Relations 12-JUN-	2018	Closed		12-JUN-18		12-JUN-18
504 Ci	ustomer	Relations 19-JUN-		Closed		19-JUN-18		19-JUN-18
504 Ci	ustomer	Relations 26-JUN-	2018	Closed		26-JUN-18		26-JUN-18
	Offering10	L						
	Run Mode	REPORT			Report			
		30-DEC-2018			Report			
							Þ	
		<			,			
				(QK	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 A	Info	Class Status	Start Date 🔺	End Date 🔺
504 Electronic Prescriptions in Urgent Care	(j)	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 Course Start Date: 19-APR-18 Course End Date: 14-JUN-18	Urgent	Care		
Offering Name: 504 Electronic Prescriptions i Offering Start Date: 19-APR-18 Offering End Date: 14-JUN-18	n Urger	nt Care		
Class Details				
Name C1	ass Sta	tus Star	t Date	End Date
504 Electronic Prescriptions in Urgent Care	losed	19-	-APR-18 2	14-JUN-18
Course8				
Offering8				
Course9				
Offering9				
Course10				
Offering10				
Run Mode REPORT		Repor	t	
End Date 14-JUN-2018				
(<u>seeccos</u>				
QK C	ancel	Clear Hel	P	

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.

	arning Admini	ISU AUOIT D	isnboard					Home Cat	alog Favorites	▼ Dashboards ▼	New 🔻	🖾 Open 👻	Signed In As	
dex	Sign-In Sheet	Class Delegate	ist Class Listing	Class Planning	g Costing	Course Lis	ting D	Delegate Status	e-Learning Te	sts Employees w/o	Specific Course	Historical C	Classes / Enrolme	» :
IHS I	Electronic Staff I	Record - Bus	iness Intelligence	2										
Cate	egorySelect Value-	🔽 Su	Select \	/alue 🗸	CourseSek	ect Value	v	Delivery Mode	NULL;Classroom;	Coz 🗸				
	s TitleSelect Value		vent StatusSelect 1						31/10/2017 1					
					Class Start D	ate between	01/10/20		9- 51/10/2017 1	2.00.00 40				
Com	petencySelect Va	aue 🗸	* Exclude National?	ies 🗸				2						
									Apply	Reset 🕶				
									Apply	Reset 🔻				
									Apply	Reset 🕶				
	2													
Cour	se 3	Del Mod	very e Title		Start Date			Primary N	Apply Aaximum Attendees	Minimum I	nternal Delegate s		All Delegates Count	
	se 3 Management Skills Pr	Мо	le Intre	o Chair a Meeting	Date	Time T		Primary N	4aximum	Minimum I Attendees E		Customers		Rema
4 000	rse	rogramme Clas	sroom 000 How t	o Chair a Meeting o Chair a Meeting	Date 02/10/2017	Time T 09:30 1	ime V	Primary N	Aaximum Ittendees	Minimum I Attendees E	Delegates	Customers 2 0	Count	Rema
4 000 4 000	rse Management Skils Pr	rogramme Clas rogramme Clas	sroom 000 How t sroom 000 How t		Date 02/10/2017	Time T 09:30 1 13:00 1	ime V 2:30	Primary N	Aaximum Attendees 15	Minimum I Attendees E	Delegates 17	Customers 2 0 3 0	Count 12	Rema 2 3
4 000 4 000 4 000	rse Management Skils Pr Management Skils Pr	rogramme Clas rogramme Clas	e 000 How t sroom 000 How t sroom 000 How t	o Chair a Meeting	Date 02/10/2017	Time T 09:30 1 13:00 1 13:30 1	Time V 2:30 7:00	Primary N	faximum Ittendees 15 6	Minimum I Attendees [Delegates 12 3	Customers 2 0 3 0 3 0	Count 12 3	Rema 2 3 3
4 000 4 000 4 000 4 000	rse Management Skils Pr Management Skils Pr Management Skils Pr	Moo rogramme Clas rogramme Clas rogramme Clas rogramme Clas	e O00 How t sroom 000 How t sroom 000 How t sroom 000 How t sroom 000 How t	o Chair a Meeting o Chair a Meeting	Date 02/10/2017 03/10/2017	Time T 09:30 1 13:00 1 13:30 1 09:30 1	ime V 2:30 7:00 6:00 7	Primary N	4aximum tittendees 15 6 12	Minimum I Attendees I	Delegates 12 3 8	Customers 2 0 3 0 3 0 3 0	Count 12 3	Remain 2 3 3 3 3
4 000 4 000 4 000 4 000 4 000	ise Management Skills Pri Management Skills Pri Management Skills Pri Management Skills Pri	rogramme Clas rogramme Clas rogramme Clas rogramme Clas rogramme Clas	e 110e sroom 000 How t sroom 000 How t sroom 000 How t sroom 000 How t sroom 000 How t	o Chair a Meeting o Chair a Meeting o Chair a Meeting	Date 02/10/2017 03/10/2017	Time T 09:30 1 13:00 1 13:30 1 09:30 1	ime V 2:30 7:00 6:00 2:30	Primary N	Aaximum Ittendees 15 6 12 9	Minimum I Attendees I	Delegates 12 3 8 8	Customers 2 0 3 0 3 0 3 0 7 0	Count 12 3 8 8	3 3 3 7

- 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.

	n Dashbo	bard				Home C	Catalog Favorites	 Dashboards 	• 📔 🤷 New 👻	🔁 Open 👻	Signed In As	
dex Sign-In Sheet Class Dele	gate List	Class Listing Class F	Planning Costi	ig Cours	se Listing	Delegate Statu	us e-Learning Te	sts Employees w	/o Specific Course	Historical	Classes / Enrolme »	
HHS Electronic Staff Record -	Business	Intelligence										
CategorySelect Value	Sub-Cater	orySelect Value	Y Course -	Select Value	e 🗸	Delvery Mod	e NULL;Classroom;					
Class TitleSelect Value		atusSelect Value					Bo- 31/10/2017 1					
				Date Det	ween 01/10	2017 12.00.00	20- 31/10/201/ 1	2.00.00 20				
CompetencySelect Value	* Excl	ude National? Yes 🔽										
							Apply	Reset 👻				
							Apply	Reset 🕶				
							Apply	Reset 🕶				
3							Apply	Reset 🕶				
Course	Delivery Mode	Title	Start Date	Start Time	End Time	Primary Venue	Apply Maximum Attendees	Minimum	Internal Delegates	Customers	All Delegates Count	
Course	Mode	Title 000 How to Chair a M	Date	Time			Maximum	Minimum Attendees			Count	Remai
Course 000 Management Skils Programme	Mode Classroom		Date 1eeting 02/10/20	Time	Time		Maximum Attendees	Minimum Attendees	Delegates	2 0	Count 12	Rema
Course 000 Management Skils Programme 000 Management Skils Programme	Mode Classroom Classroom	000 How to Chair a M	Date 1eeting 1eeting	Time 17 09:30	Time 12:30		Maximum Attendees 15	Minimum Attendees	Delegates 12	2 O	Count 12 3	Remai
Course 000 Management Skils Programme 000 Management Skils Programme 000 Management Skils Programme	Mode Classroom Classroom Classroom	000 How to Chair a M 000 How to Chair a M	Date Meeting 02/10/20 Meeting 4	Time 17 09:30 13:00 13:30	Time 12:30 17:00		Maximum Attendees 15 6	Minimum Attendees	Delegates 12 3	2 0 2 0 3 0	Count 12 3 8	Remai
Course 000 Management Skils Programme 000 Management Skils Programme 000 Management Skils Programme 000 Management Skils Programme	Mode Classroom Classroom Classroom Classroom	000 How to Chair a M 000 How to Chair a M 000 How to Chair a M	Date Meeting 02/10/20 Meeting 02/10/20 Meeting 02/10/20 Meeting 03/10/20	Time 17 09:30 13:00 13:30	Time 12:30 17:00 16:00		Maximum Attendees 15 6 12	Minimum Attendees	Delegates 12 3 8	2 0 6 0 8 0	Count 12 3 8 8	Remai
Course 000 Management Skils Programme 000 Management Skils Programme 000 Management Skils Programme 000 Management Skils Programme	Mode Classroom Classroom Classroom Classroom	000 How to Chair a M 000 How to Chair a M 000 How to Chair a M 000 How to Chair a M	Date Meeting 02/10/20 Meeting 02/10/20 Meeting 03/10/20 Meeting 03/10/20	Time 17 09:30 13:00 13:30 13:30 09:30	Time 12:30 17:00 16:00 12:30		Maximum Attendees 15 6 12 9	Minimum Attendees	Delegates 12 3 8 8		Count 12 3 8 8 7	- - - - - - - - - - - - - - - - - - -

- 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