

Class Administration URP



July 2019

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Introduction

The Class Administration URP allows a user to administer enrolments against classes to which the user has been given access

The Learning Administration URP retains rights to set up courses and offerings, but once set up the management of classes within the offering can be undertaken by holders of the Class Administration URP.

Flexibility allows organisations to:

- Decide locally how access will be restricted, and set up appropriate groups to control access
- Highlight specific learning offerings where the classes can be updated and amended

Holders of the URP can:

- Administer enrolments (add/update/delete) against classes to which the user has been given access
- Schedule classes within the catalogue
- Update competencies and qualifications

Access to the Learning Catalogue and Enrolments for the Learning URPs can be summarised as follows:

- Learning Administration - Full access
- Class Administration - Full administration at class level
- Learning Instructor - Administration of added enrolments

Further details are in Appendix A

Initial Set Up

For a user with XXX Class Administration to be able to administrate classes:

- The OLM Data Group must be active
- The OLM Data Group must be added to the Person record
- The OLM Data Group must be added to the Offering.

If any of these conditions are not met then the user will be unable to carry out the tasks required.

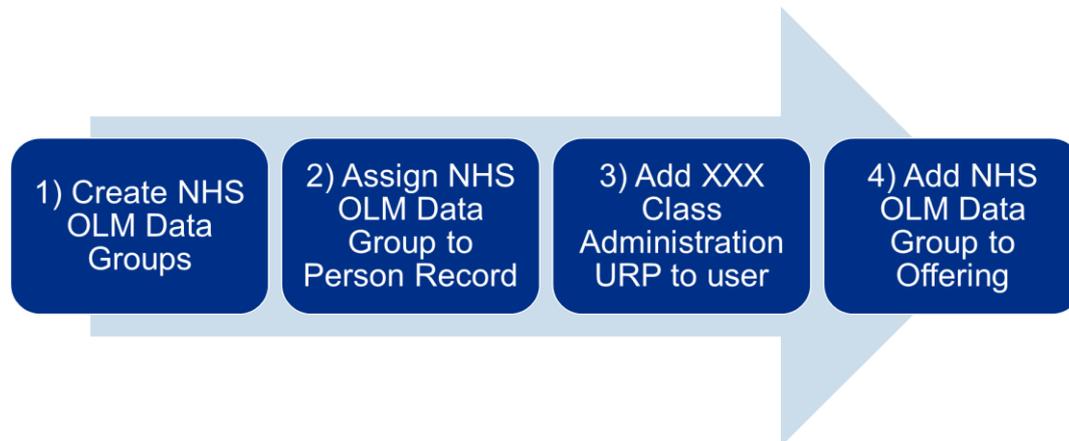
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The steps to ensure that the Class Administration URP can be used effectively are as follows:



Systems Admin and HR Actions

To minimise work for Systems Administrators, identify the courses where Learning Administration can be devolved and the administrators that require the Class Administration URP.

Ensure that OLM Data Groups are created for each Offering and added to the Person EIT.

It is then possible to control access to classes by adding or removing the OLM Data Group from the offering

Tasks carried out by Local HRMS System and User Administration and HR Administration URPs.

Action	Responsibility
Create OLM Data Groups	XXX Local HRMS Systems and User Administration
Add OLM Data Groups to person records	XXX Local HRMS Systems and User Administration/ XXX HR Admin
Add XXX Class Administration URP to users	XXX Local HRMS Systems and User Administration

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1 - Create NHS OLM Data Groups

Login as XXX Local HRMS Systems and User Administration

- Select Application Utilities Lookups

T01 Local HRMS Systems and User Administration

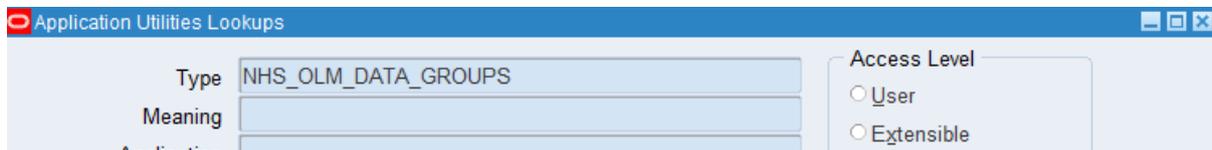
- Setup Users
- Maintain Roles
- Maintain CRS Person UUID
- OLM Data Groups
- NHS User Level Override Setup

Maintain Local Values

- Flexfield Values
- Administer Folders
- Application Utilities Lookups

Requests

- Find Lookup – NHS_OLM_DATA_GROUPS



Application Utilities Lookups

Type: NHS_OLM_DATA_GROUPS

Meaning:

Application:

Access Level

User

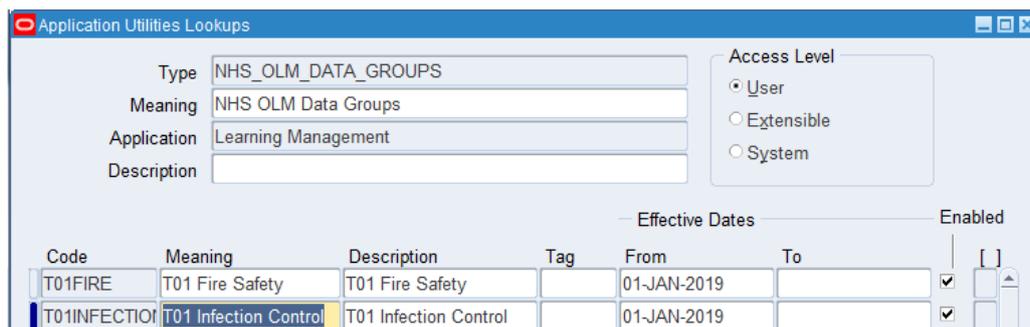
Extensible

- Create Groups:

Code: No spaces, less than or equal to 20 characters

Meaning: Use name that identifies the team that will be responsible for administering classes. Less than or equal to 80 characters

Can create as many groups as required.



Application Utilities Lookups

Type: NHS_OLM_DATA_GROUPS

Meaning: NHS OLM Data Groups

Application: Learning Management

Description:

Access Level

User

Extensible

System

Effective Dates

Enabled

Code	Meaning	Description	Tag	From	To	Enabled
T01FIRE	T01 Fire Safety	T01 Fire Safety		01-JAN-2019		<input checked="" type="checkbox"/>
T01INFECTIO	T01 Infection Control	T01 Infection Control		01-JAN-2019		<input checked="" type="checkbox"/>

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2 - Assign NHS OLM Data Group to Person Record

System and User Administration - OLM Data Groups or:

HR Administration - Person - Extra Information - OLM Data Groups

T01 Local HRMS Systems and User Administration

 Setup Users

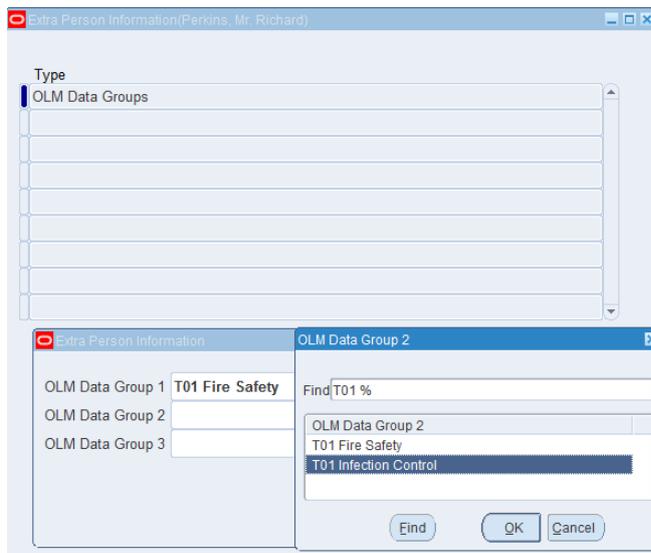
 Maintain Roles

 Maintain CRS Person UUID

 **OLM Data Groups**

 NHS User Level Override Setup

Up to three OLM Data Groups per person.



Extra Person Information(Perkins, Mr. Richard)

Type
OLM Data Groups

OLM Data Group 1 T01 Fire Safety
OLM Data Group 2
OLM Data Group 3

OLM Data Group 2
Find T01 %
OLM Data Group 2
T01 Fire Safety
T01 Infection Control

Find OK Cancel

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3 - Add XXX Class Administration URP to user

Local HRMS System and User Administration - Setup Users

The screenshot shows the 'Users' application window with the following details:

- User Name: T01RPERKIN01
- Password: [Empty field]
- Description: Richard Perkins
- Status: Active
- Person: Perkins, Mr. Richard
- Customer: [Empty field]
- Supplier: [Empty field]
- E-Mail: [Empty field]
- Fax: [Empty field]
- Password Expiration:
 - Days: 90
 - Accesses: [Empty field]
 - None
- Effective Dates:
 - From: 24-APR-2019
 - To: [Empty field]

Below the form, there are tabs for 'Direct Responsibilities', 'Indirect Responsibilities', and 'Securing Attributes'. The 'Direct Responsibilities' tab is active, showing a table of responsibilities:

Responsibility	Application	Description	Security Group	Effective Dates From	Effective Dates To
T01 Employee Self Service	Human Resources		Standard	24-APR-2019	
T01 Class Administration	Learning Management		Standard	04-JUN-2019	

Note - NHS CRS Smartcard is optional for Learning Administration, Class Administration and Learning Instructor URPs. Raise an SR to request access by username and password for these URPs.

The screenshot shows the 'Self Service Center' interface. The breadcrumb path is: Home > Request a new Service > AC > VPD Management > URP Change. The breadcrumb 'URP Change' is highlighted with a red box. The main content area shows several service request options:

- Request a Service** Enable Manual Login for Employee Self Service and Learning URPs (highlighted with a red box)
- Request a Service** Specialised URP Setup - Medical & Dental and/or Bank Staff
- Request a Service** Specialised URP Setup - Other

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4 - Add NHS OLM Data Group to Offering

Learning Administration URP task

- Find required Offering
- Add Data Group in Administration section

Enrolment

 **TIP** The attendee minimum and maximum values you enter here are the default values for new classes created under this offering. Modifying these values does not affect existing values for an individual class, go to the properties page for the class.

Maximum Attendees Minimum Attendees
Maximum Internal Attendees

Administration

Offering Administrator 
Supplier 
OLM Data Group 
Deactivate Waitlisting 

Competency Update Settings

- Repeat for each Offering where Class Administration URP will be used

Other tasks that may need to be considered: Create Resource Checklist for ease of booking resources

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Learning Dashboard

This is available to the Learning Administration, Class Administration and Learning Instructor URPs.

The screenshot displays the NHS Electronic Staff Record (ESR) Learning Dashboard. On the left is a blue navigation menu with 'Learning' highlighted. The main dashboard area contains several widgets: a 'Compliance Rate' gauge showing 56.82%, a 'DNA Rate' bar chart titled 'DNAs over the previous month', and a table titled 'Organisation Non-Compliance' showing the 'Bottom 10 Orgs by Compliance'. Below these are two tables for 'Upcoming Classes' and 'Update Attendance'.

Update Attendance Portlet

The 'Update Attendance' portlet shows a table with the following data:

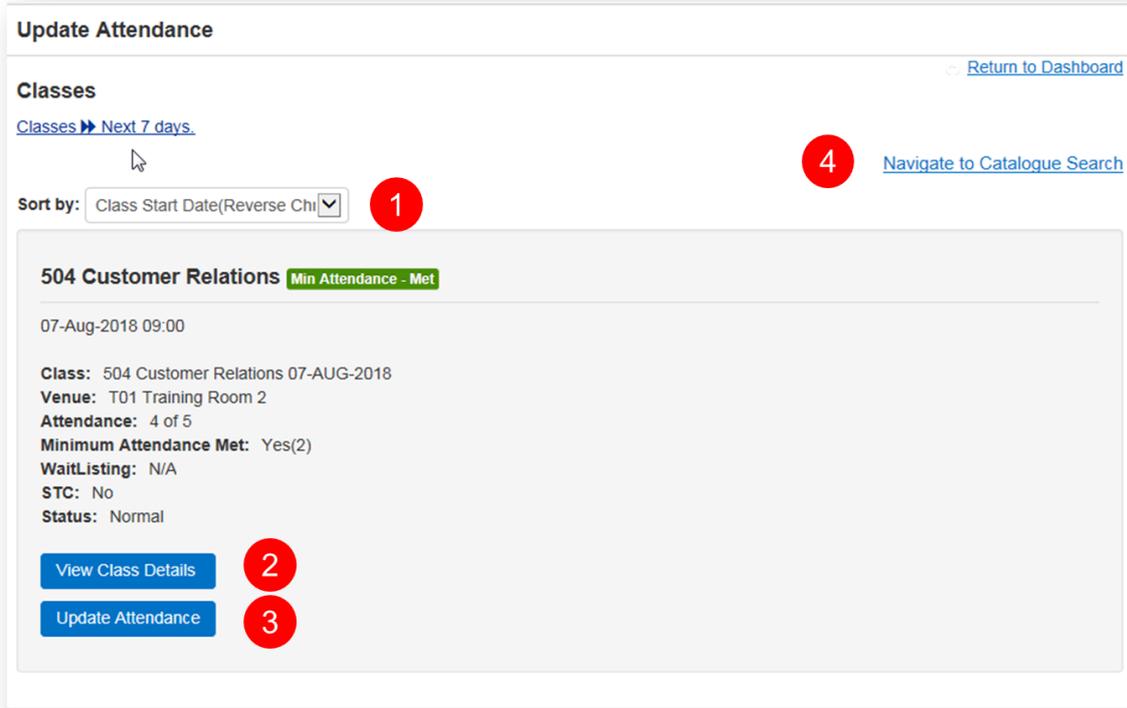
Day	Date	Classes	Min. not met
Wed	15/08	1	0
Tue	14/08	1	0
Mon	13/08	0	0
Sun	12/08	0	0
Sat	11/08	0	0
Fri	10/08	1	1
Thu	09/08	2	0

Below the table, there is a 'Previous' link and a 'View Classes' button.

- Class Administration URP will only see classes that they can administer
- Used to update attendance on classes within the past 14 days using the Previous and Next buttons.
- Click View Classes for further details.

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View Classes



Update Attendance

[Return to Dashboard](#)

Classes

[Classes](#) ▶ [Next 7 days](#)

Sort by: **1**

[Navigate to Catalogue Search](#) **4**

504 Customer Relations Min Attendance - Met

07-Aug-2018 09:00

Class: 504 Customer Relations 07-AUG-2018
Venue: T01 Training Room 2
Attendance: 4 of 5
Minimum Attendance Met: Yes(2)
WaitListing: N/A
STC: No
Status: Normal

[View Class Details](#) **2**

[Update Attendance](#) **3**

1. Change the sort order, default is by Class Start Date.
2. Displays the class in the Catalogue Search, enabling the administrator to view the associated Offering, view the class and manage enrolments.
3. Direct access to an Update Attendance form
4. Opens Catalogue Search.

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Updating Attendance

Selecting once will mark learners as Completed

Organisation : Show Apply

Learner ↕	Enrolment Status ↕	<input checked="" type="checkbox"/> Update
Paracka, Mr. Bjavisha	Confirmed	<input checked="" type="checkbox"/>
Cegolon, Mr. Bidhya	Confirmed	<input checked="" type="checkbox"/>
Cegolon, Mr. Bobbyjit	Confirmed	<input checked="" type="checkbox"/>
Southwood Turner, Mr. Omer Hasem	Confirmed	<input checked="" type="checkbox"/>

Add Learners Apply

Selecting twice will mark learners as Did Not Attend

Organisation : Show Apply

Learner ↕	Enrolment Status ↕	<input checked="" type="checkbox"/> Update
Paracka, Mr. Bjavisha	Confirmed	<input type="checkbox"/>
Cegolon, Mr. Bidhya	Confirmed	<input checked="" type="checkbox"/>
Cegolon, Mr. Bobbyjit	Confirmed	<input checked="" type="checkbox"/>
Southwood Turner, Mr. Omer Hasem	Confirmed	<input checked="" type="checkbox"/>

Add Learners Apply

Selecting three times will clear check box

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Organisation : Show Apply

Learner ↕	Enrolment Status ↕	<input checked="" type="checkbox"/> Update
Paracka, Mr. Bjavisha	Confirmed	<input type="checkbox"/>
Cegolon, Mr. Bidhya	Confirmed	<input checked="" type="checkbox"/>
Cegolon, Mr. Bobbyjit	Confirmed	<input checked="" type="checkbox"/>
Southwood Turner, Mr. Omer Hasem	Confirmed	<input checked="" type="checkbox"/>

Add Learners Apply

Clicking Apply will update the status, no further changes can be made using the Portlet.

Learner ↕	Enrolment Status ↕	<input type="checkbox"/> Update
Cegolon, Mr. Bidhya	Completed	<input type="checkbox"/>
Cegolon, Mr. Bobbyjit	Completed	<input type="checkbox"/>
Southwood Turner, Mr. Omer Hasem	Completed	<input type="checkbox"/>
Paracka, Mr. Bjavisha	Did Not Attend	<input type="checkbox"/>

Add Learners Apply

Note – Any learner with a status of Completed will be deemed to have Successfully Attended and will be awarded any competencies associated with the course.

If you do not want to award associated competencies or if further information needs to be added, such as reasons for DNA, then this must be managed via the Enrolment form in ESR.

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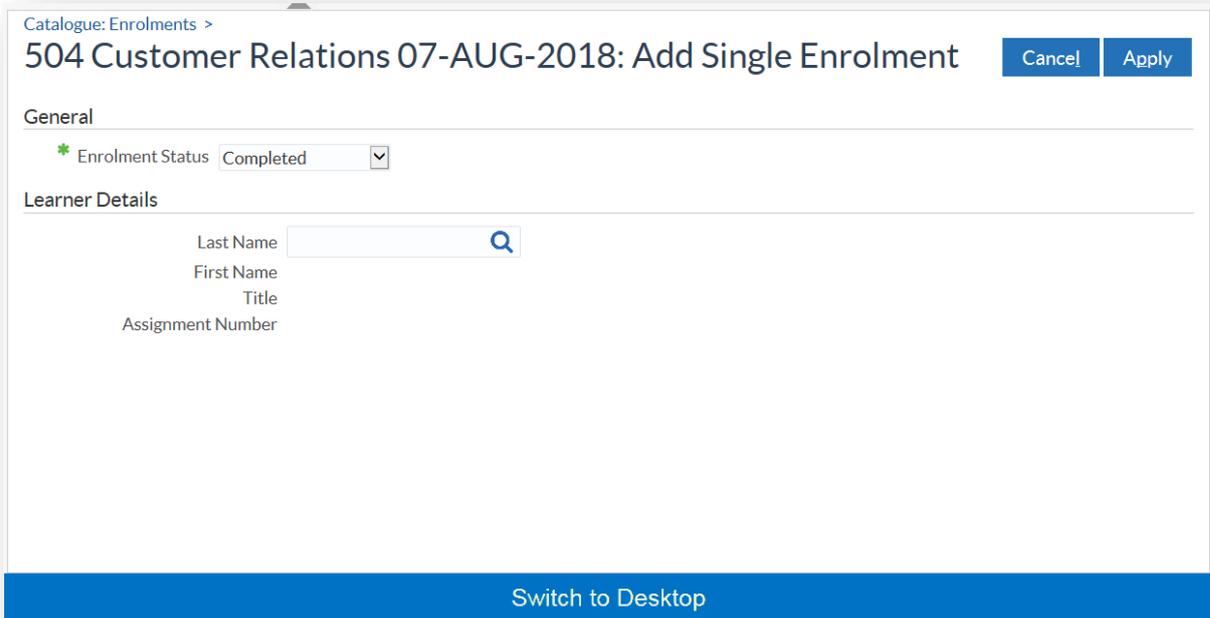
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Add Learners

Learners can be added to a class by clicking on the Add Learners button.

The default Enrolment status is set to Completed.



Catalogue: Enrolments >

504 Customer Relations 07-AUG-2018: Add Single Enrolment

Cancel Apply

General

* Enrolment Status ▼

Learner Details

Last Name 🔍

First Name

Title

Assignment Number

Switch to Desktop

Note - Mobile view restricts fields to be populated to Enrolment Status and Last Name.

Clicking Apply will add the enrolment to the class with the selected Enrolment status.

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Catalogue: Enrolments >
504 Customer Relations 07-AUG-2018: Add Single Enrolment Cancel Apply

General

* Enrolment Status

Learner Details

Last Name

First Name

Title

Assignment Number

Catalogue: Enrolments > 504 Customer Relations 07-AUG-2018: Add Single Enrolment >

 **Confirmation**
Successfully applied Enrolment 102509010.

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Appendix A - Functionality by URP

Learning Administration Functions	LA	CA	LI
Announcements	Y	N	N
Apprenticeship Details	Y	N	N
Assignment Set	Y	N	N
Business Intelligence	Y	Y	Y
Catalogue	Y	Y	N
Class History	N	N	Y
Competence Profile	Y	Y	N
Compliance Rate Portlet	Y	Y	N
Content	Y	N	N
Customers	Y	N	N
DNA Rate Portlet	Y	Y	N
Enrolments and Subscriptions	Y	Y	N
Forums and Chats ¹	Y	Y	Y
Instructor Home	N	N	Y
Learner Groups	Y	N	N
Learning History	Y	Y	N
NHS Pay Progression	Y	N	N
Notifications	Y	Y	Y
Organisation Non Compliance	Y	Y	N
Performance Reviews	Y	N	N
Qualifications	Y	Y	N
Resources	Y	Y	N
Resource Bookings	Y	Y	N
Request Internet Access	Y ²	Y ²	Y ²
Schools and Colleges	Y	Y	N

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Learning Administration Functions	LA	CA	LI
Search and view Learner	Y	Y ³	N
Search ESR	Y	Y	N
Submit Request	Y	N	Y
Supplementary Bookings	N	N	Y
Suppliers	Y	N	N
Upcoming Classes Portlet	Y	Y	Y
Update Attendance Portlet	Y	Y	Y
View Address	Y	N	N
View Assignment	Y	N	N
View Enter and Maintain	Y	N	N
View Phones	Y	N	N
View Request	Y	N	Y
View Supplementary Roles	Y	Y	N

- 1 Learning Administrators can create Category Forums and Chats, Learning Administrators and Class Administrators can create Class Forums and Chats, only Learning Instructors can moderate Forums and Chats.
- 2 Access to ESRBI.
- 3 Read only access to learning events to which the Class Administrator has not been given access.