

# Class Management

## Introduction

The workload related to tasks that need to be carried out by with regards to management of classes on ESR can be reduced by making use of the features available to administrators on the Learning Dashboard in the Portal and the Manage Classes form and use of associated ESR BI reports.

## Class Scheduler

The class scheduler can be used to create multiple classes in the same offering from the Manage Classes form - Offerings - Manage Classes.

Catalogue > Catalogue Search > 504 Basic Life Support: Course > Offerings >

### Classes

Course **504 Basic Life Support**      Offering **504 Basic Life Support**  
 Offering Start Date **01-Jan-2018**      Delivery Mode **Classroom**  
 Offering End Date      Language **English**

▼ Hide Search Options

Search

Class

Status

Only Normal classes are shown, leave status blank and press go to view all classes

Start Date

End Date

Class ▲	Info	Class Status	Start Date ▲	End Date ▲	Sessions	Available Seats ▲	Notify	Bulk Enrol	View Enrolments	Single Enrol	Copy	Delete	View Resources	Schedule
504 Basic Life Support 09-AUG-2018		Normal	09-Aug-2018	09-Aug-2018	0 Sessions	5								

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## Parameters

Catalogue > Catalogue Search > 504 Basic Life Support: Course > Offerings > Classes >

### Class Scheduler

Class Title	504 Basic Life Support 09-AUG-2018	Class Start Date	09-Aug-2018	Offering Start Date	01-Jan-2018
Type	Scheduled	Class End Date	09-Aug-2018	Offering End Date	
Max Attendees	10	Enrolment Start Date	02-Aug-2018		
Duration	60 Minute(s)	Enrolment End Date	09-Aug-2018		

**TIP** Class Name Prefix will be used at the beginning of the new Class Name and the class date will be added on to the end

Class Name Prefix  **1**

**2** Schedule  Weekly  Monthly

Recur every  week(s) on:

Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday  
 Sunday

End By    
 Allow classes to be created on bank holidays

**TIP** Enter the number of days before the class start date when you want to enrolments to start and end. If the fields are left blank, then the Enrolment Start and End dates will increase based upon the Enrolment Start and End Dates of the class chosen to be from.

**3** Enrolment Start Date  day(s) before Class Start Date

Enrolment End Date  day(s) before Class Start Date **4**

1. Choose Prefix for Class Title, Class Names will be suffixed with date in the format - DD-MMM-YYYY
2. Select Weekly or Monthly schedule
3. To maximise attendance on classes, enrolment start date can be set to a number of days before
4. Set Enrolment End Date to be value that corresponds with Waitlisting Withdrawal Restriction Period

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## Monthly Parameters

Monthly parameters allow you to choose which week and day of the month that you require the class to run on.

Catalogue > Catalogue Search > 504 Basic Life Support: Course > Offerings > Classes >

### Class Scheduler

Class Title	504 Basic Life Support 09-AUG-2018	Class Start Date	09-Aug-2018	Offering Start Date	01-Jan-2018
Type	Scheduled	Class End Date	09-Aug-2018	Offering End Date	
Max Attendees	10	Enrolment Start Date	02-Aug-2018		
Duration	60 Minute(s)	Enrolment End Date	09-Aug-2018		

**TIP** Class Name Prefix will be used at the beginning of the new Class Name and the class date will be added on to the end

Class Name Prefix

Schedule  Weekly  Monthly

Please enter the days of the month On the   of every month

End By

Allow classes to be created on bank holidays

**TIP** Enter the number of days before the class start date when you want enrolments to start and end. If the fields are left blank, then the Enrolment Start and End dates will increase based upon the Enrolment Start and End Dates of the class chosen to schedule from.

Enrolment Start Date	<input type="text" value="90"/>	day(s) before Class Start Date
Enrolment End Date	<input type="text" value="7"/>	day(s) before Class Start Date

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## Review Schedule

Catalogue > Catalogue Search > 504 Basic Life Support: Course > Offerings > Classes > Class Scheduler >

**Review Schedule**

Class Title: 504 Basic Life Support 09-AUG-2018  
 Type: Scheduled  
 Max Attendees: 10  
 Duration: 60 Minute(s)

Class Start Date: 09-Aug-2018  
 Class End Date: 09-Aug-2018  
 Enrolment Start Date: 02-Aug-2018  
 Enrolment End Date: 09-Aug-2018

Offering Start Date: 01-Jan-2018  
 Offering End Date:

Back Cancel Submit

This table shows a green tick against classes that will be scheduled.

Class Name	Date Start	Date End	Enrolment Start Date	Enrolment End Date	Availability	Message
504 Basic Life Support 20-AUG-2018	20-Aug-2018	20-Aug-2018	22-May-2018	13-Aug-2018	⊘	This class or session title already exists. Enter a unique class or session title.
504 Basic Life Support 27-AUG-2018	27-Aug-2018	27-Aug-2018	29-May-2018	20-Aug-2018	⊘	Bank Holiday
504 Basic Life Support 03-SEP-2018	03-Sep-2018	03-Sep-2018	05-Jun-2018	27-Aug-2018	⊘	This class or session title already exists. Enter a unique class or session title.
504 Basic Life Support 10-SEP-2018	10-Sep-2018	10-Sep-2018	12-Jun-2018	03-Sep-2018	⊘	This class or session title already exists. Enter a unique class or session title.
504 Basic Life Support 17-SEP-2018	17-Sep-2018	17-Sep-2018	19-Jun-2018	10-Sep-2018	⊘	This class or session title already exists. Enter a unique class or session title.
504 Basic Life Support 24-SEP-2018	24-Sep-2018	24-Sep-2018	26-Jun-2018	17-Sep-2018	⊘	This class or session title already exists. Enter a unique class or session title.
504 Basic Life Support 01-OCT-2018	01-Oct-2018	01-Oct-2018	03-Jul-2018	24-Sep-2018	✓	
504 Basic Life Support 08-OCT-2018	08-Oct-2018	08-Oct-2018	10-Jul-2018	01-Oct-2018	✓	
504 Basic Life Support 15-OCT-2018	15-Oct-2018	15-Oct-2018	17-Jul-2018	08-Oct-2018	✓	
504 Basic Life Support 22-OCT-2018	22-Oct-2018	22-Oct-2018	24-Jul-2018	15-Oct-2018	✓	
504 Basic Life Support 29-OCT-2018	29-Oct-2018	29-Oct-2018	31-Jul-2018	22-Oct-2018	✓	
504 Basic Life Support 05-NOV-2018	05-Nov-2018	05-Nov-2018	07-Aug-2018	29-Oct-2018	✓	
504 Basic Life Support 12-NOV-2018	12-Nov-2018	12-Nov-2018	14-Aug-2018	05-Nov-2018	✓	

- Classes that will be created marked with a green tick.
- Reasons why classes will not be created are given.
- Click Submit to create classes, click Back to make changes to parameters

## Considerations

The class scheduler can only create classes that are at regular intervals. An organisation can still use the class scheduler to create multiple classes and then update the dates accordingly or use the Copy class functionality.

Learner Access and Resource Bookings are not copied, if Learner Access is consistent across all classes then set at course or offering level.

A Resource Checklist can be created on the Offering and used to make resource bookings on individual classes.

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Catalogue > Catalogue Search > 504 Basic Life Support: Course > Offerings >

### 504 Basic Life Support: Resource Checklist

To add a new resource click on Add button.

[Add](#) [Export Resource Checklist](#) |

Type	Resource	Quantity	Required	Start Date	End Date	Update	Remove	Attachments
Internal Trainer	T01 Perkins, Mr. Richard	1	No	01-Aug-2018				
Venue	T01 Training Room 1	1	No	01-Jan-2018				

Once created, click View Resources next to the appropriate class on the Manage Classes form

[Create Class](#) [Export Class List](#) | Rows 1 to 31

Class	Info	Class Status	Start Date	End Date	Sessions	Available Seats	Notify	Bulk Enrol	View Enrolments	Single Enrol	Copy	Delete	View Resources	Schedule
504 Basic Life Support 14-AUG-2018		Normal	14-Aug-2018	14-Aug-2018	0 Sessions	3								
504 Basic Life Support 21-AUG-2018		Normal	21-Aug-2018	21-Aug-2018	0 Sessions	10								
504 Basic Life Support 22-AUG-2018		Normal	22-Aug-2018	22-Aug-2018	0 Sessions	10								

Click Resource Check List

Catalogue > Catalogue Search > 504 Basic Life Support: Course > Offerings > Classes > 504 Basic Life Support 22-AUG-2018: Class > Resource Check List >

### 504 Basic Life Support 22-AUG-2018: Resource Bookings

Manage resource bookings for this class.

Indicates primary venue

[Resource Check List](#) [Add](#) [Internal Trainer](#) [Go](#) [Export Resource Bookings](#) |

Details	Resource Name	Resource Type	Quantity	Start Date	End Date	Booking Status	Object Name	Object Type	Display To Learner	Book Entire Period	Check Conflict	Update
No results found.												

Select required resources and click Apply.

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Catalogue > Catalogue Search > 504 Basic Life Support: Course > Offerings > Classes > 504 Basic Life Support 22-AUG-2018: Class >

## Resource Check List

Cancel **Apply**

Book resources for this class from among the following required and suggested resources.

Course Name	504 Basic Life Support	Offering Name	504 Basic Life Support
Class Name	504 Basic Life Support 22-AUG-2018	Delivery Mode	Classroom
Class Status	Normal	Class Location	
Class Start Date	22-Aug-2018	Class Training Center	
Class Start Time	10:00	Language	English
Class End Date	22-Aug-2018	Time Zone	GMT
Class End Time	11:00		

### Book Resources

Booking Status

Book Entire Period

Name	Quantity	Type	Required	Check Conflict
<input checked="" type="checkbox"/> T01 Perkins, Mr. Richard	1	Internal Trainer	No	
<input checked="" type="checkbox"/> T01 Training Room 1	1	Venue	No	

## Username and Password Access for Learning URPs

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 'Request a Service' section lists three options:

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

# Class Management

## 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 navigation menu with 'Learning' highlighted. The main dashboard area contains several widgets:

- Compliance Rate:** A gauge chart showing 'Learning Compliance' at 56.82%.
- DNA Rate:** A bar chart titled 'DNAs over the previous month' grouped by staff group.
- Upcoming Classes:** A table showing class schedules for the week of 13/12 to 19/12.
- Update Attendance:** A table for updating attendance for the week of 13/12 to 19/12.
- Organisation Non-Compliance:** A table titled 'Bottom 10 Orgs by Compliance'.

## Upcoming Classes Portlet

**Upcoming Classes** ?

Day	Date	Classes	Min. not met
Wed	15/08	1	0
Thu	16/08	0	0
Fri	17/08	0	0
Sat	18/08	0	0
Sun	19/08	0	0
Mon	20/08	2	1
Tue	21/08	1	1

[Next >>](#)

[View Classes](#)  
[Access Learner Search](#)

# Class Management



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- Used to view Upcoming Classes within the next 14 days using the Next and Previous buttons.
- Provides direct access to the Learner Search.
- Click View Classes for further details

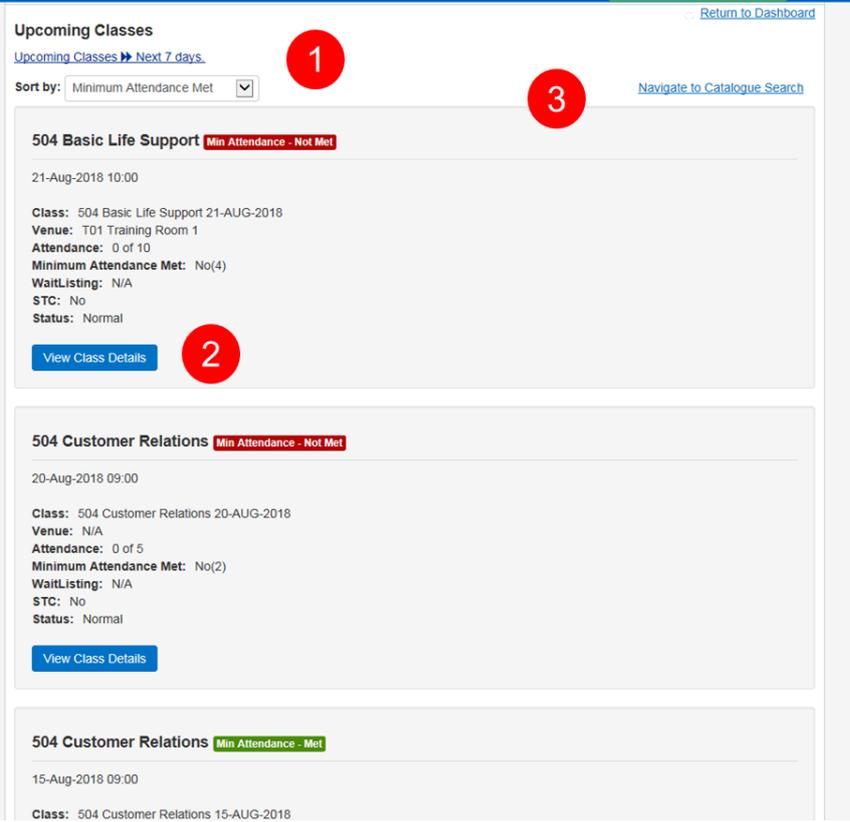
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## View Classes



The screenshot displays the 'View Classes' page. At the top right, there is a link for 'Return to Dashboard'. Below the header, there are two links: 'Upcoming Classes' and 'Next 7 days'. A dropdown menu is set to 'Sort by: Minimum Attendance Met', with a red circle '1' next to it. To the right of the dropdown is a link 'Navigate to Catalogue Search' with a red circle '3' next to it. The main content area lists three classes:

- 504 Basic Life Support** (Min Attendance - Not Met): 21-Aug-2018 10:00. Details include Class, Venue (T01 Training Room 1), Attendance (0 of 10), Minimum Attendance Met (No(4)), WaitListing (N/A), STC (No), and Status (Normal). A 'View Class Details' button is present with a red circle '2' next to it.
- 504 Customer Relations** (Min Attendance - Not Met): 20-Aug-2018 09:00. Details include Class, Venue (N/A), Attendance (0 of 5), Minimum Attendance Met (No(2)), WaitListing (N/A), STC (No), and Status (Normal). A 'View Class Details' button is present.
- 504 Customer Relations** (Min Attendance - Met): 15-Aug-2018 09:00. Details include Class.

1. Change the sort order, default is by Minimum Attendance met.
2. Displays the class in the Catalogue Search, enabling the administrator to view the associated Offering, view the class and manage enrolments.
3. Opens Catalogue Search

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## Update Attendance Portlet

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

Update Attendance 			
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

[←Previous](#)

[View Classes](#)

- Used to update attendance on classes within the past 14 days using the Previous and Next buttons.
- Click View Classes for further details.

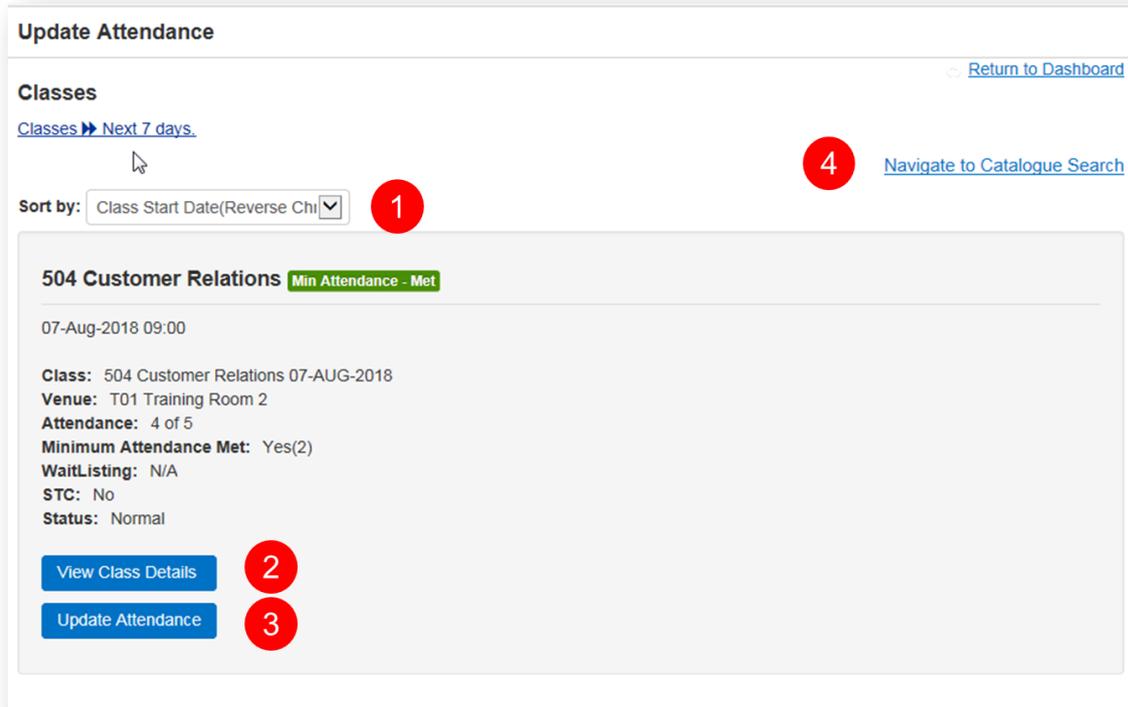
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## View Classes



**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.



# Class Management



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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.**

# Class Management



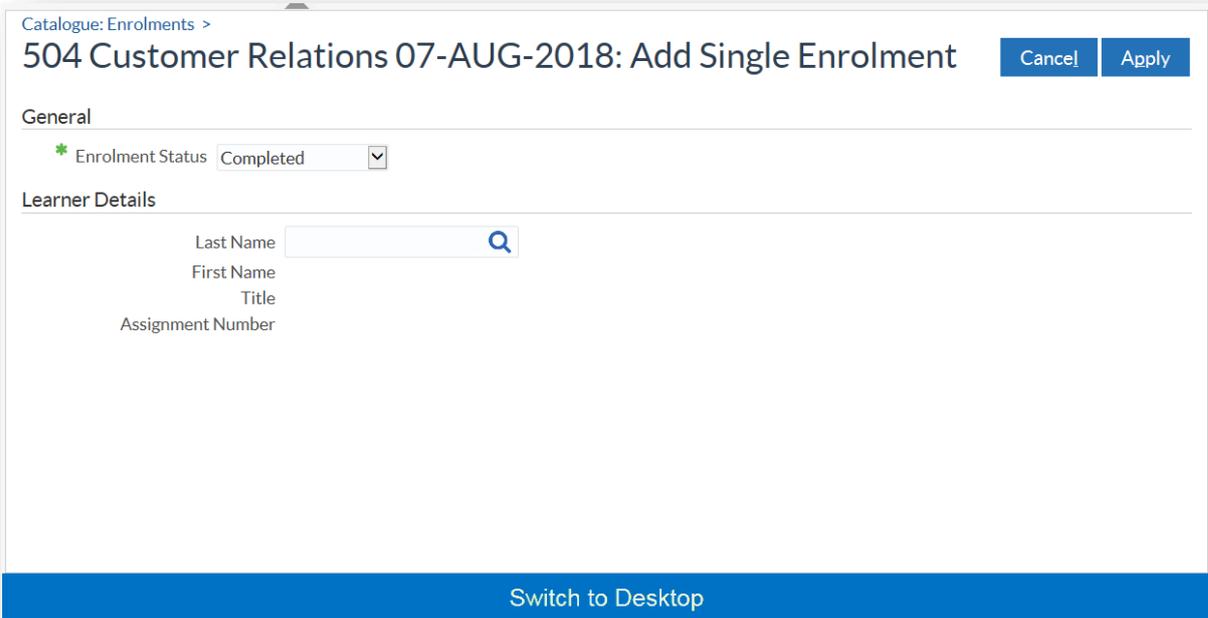
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## Add Learners

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

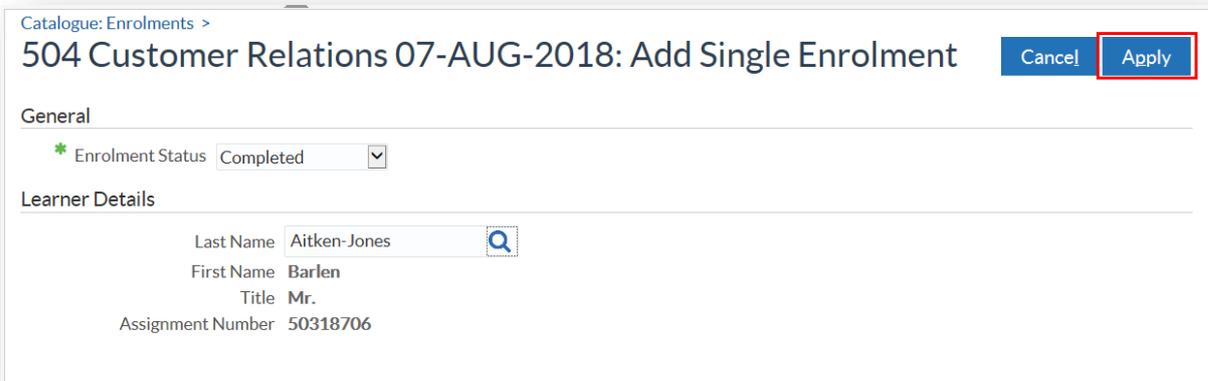
First Name

Title

Assignment Number

Switch to Desktop

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



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

# Class Management



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

 Confirmation  
Successfully applied Enrolment 102509010.

## Closing Classes

Classes should be closed once attendance has been updated. This reduces the number of results returned by searches and makes it clear to other administrators that tasks associated with class management have been completed

Select the Class Status hyperlink from the Manage Classes form

Catalogue > Catalogue Search > 504 Customer Relations: Offering >

### Classes

Course **504 Customer Relations**  
Offering Start Date **01-Apr-2015**  
Offering End Date

[Hide Search Options](#)

Search

Class   
Status   
Only Normal classes are shown, leave status blank and press go to view all classes  
Start Date    
End Date  

|      

Class ^	Info	Class Status	Start Date ^	End Date ^
504 CustomerRelations 02-APR-2015		<b>Normal</b>	02-Apr-2015	02-Apr-2015

## Update the Status to Closed

Catalogue > Catalogue Search > 504 Customer Relations: Offering > Classes >

Change maximum attendees or class status: 504 CustomerRelations 02-APR-2015

Select either Change Max Attendees or Change Status. You can submit only one change at a time.

\* Indicates required field

Select an Option

\* Class Status

Enrolment Status

Set Maximum To Places Enrolled

The Enrolment Status of any learner with a value of Requested will be updated to the value chosen.

**Note – Multiple classes can be closed using the NHS End Date/Close Course, Offering, Class process.**

# Class Management



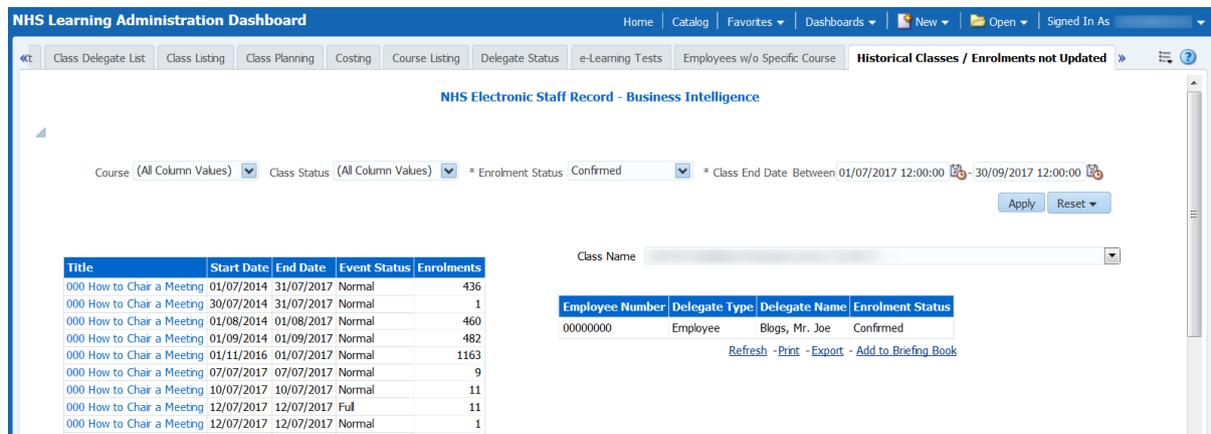
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## ESR BI Reports

Administrators should ensure that Enrolments on classes that have finished are updated to a status other than Confirmed, Waitlisted or Requested.

Use the Historical Classes /Enrolments not Updated analysis in the NHS Learning Administration Dashboard.



**NHS Learning Administration Dashboard**

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

Class Delegate List | Class Listing | Class Planning | Costing | Course Listing | Delegate Status | e-Learning Tests | Employees w/o Specific Course | **Historical Classes / Enrolments not Updated**

NHS Electronic Staff Record - Business Intelligence

Course: (All Column Values) | Class Status: (All Column Values) | \* Enrolment Status: Confirmed | \* Class End Date: Between 01/07/2017 12:00:00 - 30/09/2017 12:00:00

Apply | Reset

Class Name: [Text Box]

Title	Start Date	End Date	Event Status	Enrolments
000 How to Char a Meeting	01/07/2014	31/07/2017	Normal	436
000 How to Char a Meeting	30/07/2014	31/07/2017	Normal	1
000 How to Char a Meeting	01/08/2014	01/08/2017	Normal	460
000 How to Char a Meeting	01/09/2014	01/09/2017	Normal	482
000 How to Char a Meeting	01/11/2016	01/07/2017	Normal	1163
000 How to Char a Meeting	07/07/2017	07/07/2017	Normal	9
000 How to Char a Meeting	10/07/2017	10/07/2017	Normal	11
000 How to Char a Meeting	12/07/2017	12/07/2017	Full	11
000 How to Char a Meeting	12/07/2017	12/07/2017	Normal	1

Employee Number	Delegate Type	Delegate Name	Enrolment Status
00000000	Employee	Blogs, Mr. Joe	Confirmed

[Refresh](#) | [Print](#) | [Export](#) | [Add to Briefing Book](#)