**DDE (Scheduled and Invitation) Session booking, filing and recording process**

If it is your first time using this process you are advised to read everything, after that read only what you need for reference. As with all processes there are lots of discretionary notes and tips, but all the actions are critical and mandatory. For the purpose of this process there are two identified roles the ‘Requester’ (you) and the ‘Organiser’ (Adrian Cain (AC)).

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| **1) Action** | Requester to fill out the relevant excel form;  For Scheduled Sessions – ‘2014\_2015 LS DDE Scheduled Sessions’  For Invitation Only Sessions - ‘2014\_2015 LS DDE Invitation Only (bespoke) Sessions’  *Located in the ‘DDE 2014-15 Programme’ folder (Learning Services/ Common/ Developing Digital Excellence)* |
| Important notes | * As a guide of the details that are needed either, refer to previous entries, or for Invitation Sessions there is an example (in Yellow) at the top of the spreadsheet (please don’t overwrite or delete it), or ask (AC). * Use a new row for each date/session * Active - All sessions will be created as not (N) active * Description (Title) =   + Scheduled Sessions = [Title] - Digital Practitioner (e.g. Collaborate; Online Teaching and Learning - Digital Practitioner)   + Bespoke (Invitation Only) = [Title] – By Invitation Only - Digital Practitioner – [Who = FoH/FoE/FAS/LS/SS/ITS] (e.g. Blackboard Administrator training for Sports administrators - By Invitation Only - Digital Practitioner – FAS) * Venue – Room number, floor, building, (Minimum) if Online just enter Online * Date – in this format with the same spaces and commons - Wednesday, 22 April, 2015 * Time – 24 hour clock in this format with the same spaces and dash - 15:00 – 16:00 * Session Outline – Something has to be put in this field, so I will just enter TBC, and then you can fill out the detail. This stops any issues with formatting, lost text etc. * Places limited (max.no) – This is how many participants you can get in the room. For IT room always make some allowance for PCs not working. For online sessions, make allowance for getting everyone on and then moderating chat and activities during the session, a guide maybe 10 for a single leader and 30 for 2 leaders, and so on. * Reserve list (min.no) – This is the amount of participants beyond the ‘Places limited’ that can book and will be sent an email saying if anyone cancels they’ll get their place etc. – Suggestion of ~20% of Max no. (i.e. 2 for G2 Training Room (13) and 5 Online (30)) * Class/Online - Identity if it is class or online session with Y/N |
| Tip | Keep Description (titles) as brief as possible, unique and avoid colons, all of which will help the search-ability of sessions. |

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| **2) Action** | Requester (you) to send an email to the Organiser [caina@edgehill.ac.uk](mailto:caina@edgehill.ac.uk) confirming a request has been filled out. State the latest date required for the session to be booked-in by, especially if it is urgent. |
| Important notes | * These spreadsheets will not be checked routinely, therefore no one will be aware of a request unless the Requester (you) email the Organiser. |
| Tip | As soon as you know you need a session booking (and you have the basic details) put in a request. You can then modify it as you need to later. |

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| **3) Action** | The session will be booked in by the Organiser and a completion confirmation email sent back to the Requester (you). |
| Important notes | * If a request is (or becomes) urgent and the Organiser (AC) is not available, then Elaine Czotter has the same system privileges and could book in the session. |
| Tip | None |

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| **4) Action** | Requester is responsible to check all the details are correct, add the ‘Session Outline’ and (when ready) make it active. |
| Important notes | * Check the date, time, venue, title, facilitators etc. are correct. * To make it active, click the ‘Yes’ radio button next to Active and click ‘Update’. Participants can now book on to it. * If you are cutting and pasting text into the ‘Session Outline’, be careful with bullets, dashes, quotations etc, as they may not format correctly |
| Tip | None |

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| **5) Action** | Requester (you) to send out the invite to potential participants |
| Important notes | * In any invite you send out you can add a link to help participants book, you can either use;   + Single Sessions - In the ‘Course Booking’ side, enter the session if thou you were going to book on to it yourself and take the URL address off the top.   + Available sessions – Take the ‘Wiki Link 1’ search term link from the bottom of the event booking page in the ‘Admin’ side, this will gives you all the available/active events of that ‘Description’ (Name). As this way deep links into the booking form, there is no detail of the ‘Venue’ of the event. So, you may want to make sure you include the ‘Venue’ detail on your invitation email. * Blog post invites – If you are using a blog post (LE/LS) to advertise your (probably scheduled) session then please be aware that Wordpress seems to add extra character into the copied/pasted URL and the links don’t work. This only happens to links copied from within the HR SD Booking system, all other links are OK. To get around this, use TinyURL to create a different address and paste this instead. * Stress how import it is for individuals to book their own training. |
| Tip | Remember participants cannot see the details of any sessions taking place on the same day as they are viewing, or before that day. They will only be able to see session happening on the next day (tomorrow) and beyond. So it is advisable to encourage to book as early as possible. |

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| **6) Action** | Requester (you) to facilitate the event, register those who attend and record any who haven’t booked on. |
| Important notes | * Open the HR SD Booking System to register the attendees * Take names and usernames of all of those who haven’t booked on to the HR SD Booking System but who are attending * Encourage colleagues to always book themselves onto sessions (HR SD Booking System) in future;   + EHU expects that any training and development activity is recorded on an individual’s training history through the HR SD System.   + EHU expect individuals to take responsibility of their own accurate training records * At the end of the session send the feedback email out |
| Tip | In an effort to reinforce the importance of booking onto their own sessions, highlight to those who haven’t done so, that we (LTD) will need to send a ‘Special enrolments request’ to HR to retrospectively book them on to this session. |

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| **7) Action** | Following the session, the Requester to send the Organiser an email with details of all those who attended but didn’t book on to the HR SD System beforehand. |
| Important notes | * Email to contain all the names and username of those participants who didn’t book on before the session * Email to also contain the following session details;   + Description (Title)   + Facilitator/s   + Date and Time |
| Tip | Forward these details ASAP, as statistics are gathered at the end of every month. |

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| **7) Action** | Organiser to email HRHelpdesk with ‘Special enrolments requests’ |
| Important notes | * Organiser to collate all enrolment request * Organiser to assess/discuss if ad-hoc or set-time email requests (e.g. 3rd week of month) are best * Organiser to check enrolments have been completed correctly |
| Tip | None |

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| **7) Action** | Requester (you) to file all session materials centrally |
| Important notes | * Having session materials filed centrally, will allow browsing and possible re-use/re-purposing of materials, especially with regard to bespoke session. * File materials in …… Learning Services\Common\Developing Digital Excellence\DDE 2014-15 Programme and then in either the ‘Bespoke Sessions 14\_15’ or ‘Scheduled Sessions 14\_15’ ‘folders |
| Tip | None |