UTBS: Event and Session Fields Guidelines for New and Existing Courses for Administrator Training

Please use wiki mark-up to format text as guided below. For more information on wiki mark-up see: https://en.wikipedia.org/wiki/Help:Cheatsheet

Field	Field Guidelines
Event title	*Do not make this too long as it will affect the display in the timetable (etc.). *All Event Titles in Title Case (excluding a, the, in etc.) *If an event is targeted at a certain set of disciplines, advertise this in the event title and specify this in the 'Target Audience' field e.g. Supervising Undergraduates and Small Group Teaching (Arts and Humanities and Humanities and Social Sciences) *If an event forms part of a grouping with the same element, start the Event Title with that element followed by a colon e.g. Excel 2007: An Introduction, or Excel 2007: Analysing and Summarising Data *If an event is part of a series include this in the title e.g. Module 4: Linear Regression (Series 1), Module 4: Linear Regression (Series 2)
Prog name	Should be taken from the information in the Programmes tab
Course ID	Prefix with the providers short name and a dash. Use a short title and make lowercase e.g. **ucs-wordintro**
Course type	**Select from:** *instructor-led *self-taught *facility-booking
Sub type	**Sub type for instructor-led:** * taught-course * seminar * bespoke * one-to-one * workshop * other **Sub type for Self-taught:** * online * materials-may-be-loaned-out * materials-may-be-bought * subscription-based * other For facility bookings this will be empty
Event status	**Please choose the event status:** *Unpublished: hides event from the end user and no bookings can be made *Published: is viewable to the end user and can take bookings (if the allow bookings box is ticked) *Postponed: the event status is displayed to the end user and no more bookings can be taken *Cancelled: the event status is displayed to the end user and no more bookings can be taken *Completed: once attendance is recorded the status automatically changes to 'Completed'
Show on timetable	Principally applies to the end user - if not ticked the event will not be displayed on the timetable, e.g. a one-to-one or target course that you may want to advertise directly with a URL (rather than on the timetable). Administrators will still see the event in the timetable, but in brackets
Show on themes page	Unless the 'Show on themes page' is ticked, the event will not be displayed in the 'Courses by theme' page under all courses, or any theme that it may have been associated with it
Show on Search	Most events will have 'Show on Search' ticked, unless the event is for facility bookings or a targeted course advertised directly by URL
Allows bookings	If ticked bookings can be made on this event, including 'Register your interest', which occurs when no min or max number is set (special eligibility shouldn't be set for this). If not ticked no bookings can be made on this event (except manual bookings by the administrator)
Min participants	The minimum number of participants required to run the course. If the minimum (and maximum) number is not set, then the event will not accept bookings
Max participants	The maximum number of participants allowed on the course. When this number is reached the waiting list booking option is automatically initiated
Standby places	The number of standby places for the event. If left empty, once the maximum number is reached bookings are placed onto the waiting list
Special eligibility	If ticked, all bookings for the event will need approval. Participants will be marked as 'Provisional' until the booking is approved. The booking status then changes to booked. Minimum and maximum participant numbers must be set for Special Eligibility events
Copy to next programme	If the programme is cloned the whole event is cloned onto the new programme

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Administrator	If a person is not a system wide training administrator, but needs editing rights to a particular event, they can be assigned as an administrator. Administrator privileges are automatically assigned and include: *approve-booking *delete-booking *edit-booking *edit-booking-admin-notes *edit-booking-charging-rate *edit-booking-payment-info *edit-booking-status *edit-event *edit-session-admin-info *record-attendance *send-email *view-booking-admin-info *view-course-events *view-event-admin-info *view-event-bookings *view-event-emails *view-event-reports *view-event-sessions *view-person-special-requirements
Owner	If a person has responsibility for a course, and requires to see the 'View bookings' and 'Sessions' tab they can be added as an Owner. Owner privileges are automatically assigned and include: *approve-booking *view-booking-admin-info * view-course-events * view-event-admin-info * view-event-bookings * view-event-emails * view-event-reports * view-event-sessions * view-person-special-requirements
Booked by	Principally for bespoke, instructor led courses and facility bookings. Privileges are automatically assigned and include: * view-event-sessions * view-event-bookings * view-event-emails
Description	A description of the course - do not make this too verbose. Use other fields appropriately rather than placing all the information in the description field
Target audience	Should be listed in bullet point format - apply bold to each listed item. They should be in sentence case and not have a full stop after each bullet. The following are applicable: *All University members (this includes colleges and departments) *University Staff (this includes departments i.e. those on the payroll) *Departmental staff *College staff *University Students *Undergraduates *Postgraduates *Researchers *External participants *Other University members At the end of the items insert a bulleted sentence saying: Further details regarding eligibility criteria are available from [link eligibility page (e.g. https://www.training.cam.ac.uk/cppd/info/eligibility)]
Duration	The duration of the event. Format as sentence case, with no end full stop. Use text similar to: * One half day session * Two half day sessions * One full day session * Two full day session * One session of two hours
Format	Format as bulleted item, sentence case with no end full stop. Use text similar to: * Presentations, demonstrations and practicals * Presentations only * Presentations and demonstrations

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Frequency	Format as a bulleted item, sentence case with no end full stop. Use syntax similar to: * Termly * Yearly * Monthly * Weekly * A number of times per term * A number of times per year
Prerequisites	Format as bulleted item, sentence case and no end full stop. Lists any pre-requisites of the event - leave
Aims	The aims should be listed in bullet point format. Can use either aims or objectives or both.
Objectives	The objectives should be listed in bullet point format
Topics	Format as a bulleted item, in sentence case with no end full stop. The first letter of the first word should be capitalised. If sessions have different topics, add a new topic session with the session number, e.g.: Topics covered (session 1) Topics covered (session 2)
System requirements	This is applicable to self-taught courses and describes the systems required to run the course e.g. Windows XP Flashplayer (for online content), and for specifying when Raven access is required
Extra Info	This needs to be in sentence case. Titles must be consistent across events - options include: * About the presenter * Application process * Assessment * Charging * Contact information * Feedback * Further information * How to apply * Materials * Post workshop online package * Other Reading * Speakers * Taught using * Textbook(s)
Notes	User viewable: extra information about the event, bullet point items
Related courses	Title(s) of any related events(s)
Num related courses	The number of related courses including other providers
New event	Identifies new events to the programme
Updated event	The event should be flagged as updated if there has been a significant change to it
Special/external event	A flag to identify the event as special, i.e. it is a one off, or for a particular target of people e.g. departmental administrators
Extra event	A flag to identify this event as an extra run, which wasn't originally scheduled. Typically those events with high waiting lists
Beginners event	Beginners or Introduction course with no significant prerequisite required
Has prerequisites	If ticked the end user will be asked during booking on the event if they meet the pre-requisites. Enter the text for the pre-requisites in the prerequisites field
Charging status	Set if a charge is being made per booking: *Not charged: no one will pay, this disables the charging status field in the booking form *Conditionally charged: some people are charged depending on their status. If this isn't a general policy (which would be referenced in the charging policy of the provider), please ensure that there is an extra admin info field called 'Charging' that describes which rate should be chosen depending on their status (the default charging status on the booking form is: no charge) *All charged: all participants pay the same fee (by default the charging status = Full) *Special charging: all participants pay but may pay a different fee. If this isn't a general policy (which would be referenced in the charging policy of the provider), please ensure that there is an extra admin information field called 'Charging' that describes which rate should be chosen depending on their status
Default fee	If the event has a charging status of 'Conditionally charged', 'All charged', or 'Special charging', then enter the default fee of a fully charged booking. If the charging status of the booking is concessionary half of this fee is charged automatically
Cost	Total cost of running the event
Course fee	Fee charged for the whole event rather than for each individual booking. Typically a commissioned course
Course fee paid	Identifies if the course fee has been paid
Course fee payment method	How the course has been paid or will be paid: *Credit card *Purchase Order *Cash *Cheque
Course fee PO Number	Course fee PO number if the payment was by Purchase Order

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Event IT platform	The operating system and version required to run the event. Enter the information at the event level if the same information applies to all sessions. If one session differs, enter it in the 'IT Platform' field of the session tab
Event software required	The software and version required for the event. If a session has a different software requirement, enter it in the 'Software required' field of the session tab
Joining instructions	Sentence case and bulleted items. Joining instructions for the event are included in the automatic booking emails
Event admin notes	This is not user viewable. Relevant event administration should be added here - any notes should be preceded by initials and dated e.g. *MG12/07/17 Catering ordered
Extra admin info	This is not user viewable. This can be used for various reasons, e.g. work lists for administrators
Theme names	Theme names associated with this event. If referencing other providers' themes then prefix with the
Num themes	Number of themes assigned to the event
Num trainers	Number of trainers needed for the event
Trainer names	Name of the trainers and CRSID. The principal trainer should be listed first. Trainers automatically receive the following privileges for the events they are a trainer for: * send-email * view-booking-admin-info * view-event-bookings * view-event-emails * view-event-reports * view-event-sessions * view-person-special-requirements
Num sessions	Total number of event sessions (including compulsory and optional)
Compulsory sessions	The number of session(s) that are compulsory, i.e. at time of booking the participant must agree to attend this session, e.g. Session 1
Optional sessions	The number of session(s) that are optional, i.e. at time of booking participants can choose to book on this session, e.g. Session 2
Session Start(s)	Date and start time of session(s) for the event, e.g. Tue 5 Oct 09:30
Session end(s)	Date and end time of session(s) for the event, e.g. Tue 5 Oct 12:30
Session Venue(s)	Venue name(s) for the session. If the venue is not available on the drop-down-list contact the UTBS lead to add it onto the system
Session(s) venue booking start	Venue booking start date and time for each session. This is used in two ways. (1) If time is required outside of the session start time for setup. (2) If the venue is not classified as provider owned, this field can be used to mark that the booking has been confirmed by entering the matching start and end time, e.g. S1 Tue 5 Oct 09:00, S2 Wed 6 Oct 09:00
Session(s) venue booking ends	Venue booking end date and time for each session. This is used in two ways. (1) If time is required outside of the session end time for setup. (2) If the venue is not classified as provider owned, this field can be used to mark that the booking has been confirmed by entering the matching start and end time, e.g. S1 Tue 5 Oct
Session venue notes	Venue notes for each session. This field is pulled across into some email templates, e.g. Venue confirmation - S1 Teas and coffees required, S2 Teas and coffees required
Session Required setup time	If needed enter the required setup time (in minutes) before the session. Use in conjunction with Venue bookings start time
Session required restore time	If needed enter the required restore time (in minutes) after the session. Use in conjunction with Venue booking end time
Session Resource notes	Resource notes for each session. This field is pulled across into some email templates, e.g. Course setup e.g., S1 Data Projector, S2 Data Projector
Session IT Platform	If the IT platform is different for each session, add an entry in each different session. If the majority use the same, add in the Event IT Platform field and amend the different session
Session Software required	If the software required is different for each session, add an entry in each different session. If the majority use the same, add in the software required field and amend the different session