



## **Planner Module**

**June 2012**

# Administration Functions

## How to Include courses in the Planner

When you are logged into one of the Adult Education programme such as BTEI or Community Education you can profile a course by Status.

The screenshot shows a web interface for course management. At the top, there are tabs: Learners, Courses (selected), Tutors, Groups, Reporting, and Log out. Below these are links: Find Course, Participants, Labels (Cert. Achieved), Payment Report, Duplicate Course, and Profile. The main section is titled 'Course / Modules / Sessions'. It contains several input fields: Course Name (Return to Education), Course Code (WFEC RTE 08), Certified (Yes), Hours (4.00), Start Date (14/11/08), Sched. End Date (05/03/10), Actual End Date (05/03/10), Course Type (dropdown), Course Status (dropdown), and Location (dropdown). The Course Status dropdown is highlighted with a red box, showing options: Planned, Active, Complete, Planned, and Withdrawn. Below these fields, there are two rows of modules: Communications - GF0001 and Mathematics - CF0139, each with a Location, Tutor, and Tutor 2 dropdown.

The status fields are defined as follows :

Planned	When the course is planned it will appear in the Planner.
Active	This is where the course has been set up and is now active.
Complete	You would update the course to Complete when the course has actually been completed.
Withdrawn	If a course has been planned but it does not proceed you would then change the status of the course to Withdrawn.

## Procedure for moving from Planned Course to Active Course

When you look up a course and click on the D link you will see a new column called Status. If a person has been registered for a module through the planner, then their status will display "Planner" as shown below.

Participants of the Module Art/Design in the Course CEF COMMUNITY CARE					
Name	PPSN	Status	Attending	Med. Card No.	Mobile
Fiona Casey	3569269W		<input checked="" type="checkbox"/>		086 4585675
Robert Downes		Planner	<input type="checkbox"/>		
clare doyle			<input checked="" type="checkbox"/>		

When you have reviewed the courses and modules to see who has been registered you can move the course from a Planned Course to an Active Course.

1. You change the Status on the top of the page from Planned to Active.
2. You click on the Participants link as shown below and it will display the learners that have been entered through the Planner with two options. If you are "converting" the learner to a full learner you click on the Convert button. You will then be brought to the Add Learner screen where you can fill in the extra profile information for the learner. If the person has been entered on to three modules through the Planner, they will be put on the three modules when you convert them.

If you do not wish to put that person onto the course you can click on the Return button and they will be returned to the waiting list on the Planner.

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Project: BTE/  
Welcome GuestAdLit GuestAdLit

Find Course | **Participants** | Labels (Cert. Achieved) | Payment Report | Duplicate Course | Profile

Course / Modules / Sessions

Course Name: CEF COMM  
Course Code: 123  
Certified: Yes

Participants for the CEF COMMUNITY CARE Course, order by surname, firstname, module\_name.

Name (Order by Name)	Module (Order by Module)	Phone (h)	Phone (w)	Mobile	Status	Full Learner	Waiting List
Casey, Fiona	Art/Design	0404	784744	086 4585675			
Casey, Fiona	Career Information	0404	784744	086 4585675			
Casey, Fiona	Caring for Children	0404	784744	086 4585675			
Downes, Robert	Art/Design				Planner	Convert	Return
Downes, Robert	Career Information				Planner	Convert	Return
Downes, Robert	Caring for Children				Planner	Convert	Return

When you click on the Return button you will be prompted as follows

Downes, Robert Career Information  
Downes, Robert Caring for Children  
doyle, clare Art/Design  
doyle, clare Career Information  
doyle, clare Caring for Children  
Dunne, Roisin Art/Design  
Dunne, Roisin Career Information  
Dunne, Roisin Caring for Children  
Green, Michael Art/Design  
Green, Michael Career Information  
Green, Michael Caring for Children  
Kelly, Brian Career Information

**Message from webpage**

? You are about to return this Course Request Learner into Waiting List. All Courses and Modules are not available for This learner. Do you wish to continue.

OK Cancel

### Procedure for moving from Planned Course to Withdrawn Course:

If the course itself does not go ahead you can change the status of the course to withdrawn.

You will then be prompted to confirm that

- 1) The Planned learners will be returned to the waiting list.
- 2) The Full learners will be removed from this course.

Find Course | Participants | Labels (Cert. Achieved) | Payment Report | Duplicate Course | Profile

Course / Modules / Sessions

Course Name: Return to Education  
Course Code: WFEC RTE 08  
Certified: Yes  
Hours: 4.00

Start Date: 14/11/08  
Sched. End Date: 05/03/10  
Actual End Date: 05/03/10

Course Type:   
Course Status: **Withdrawn**  
Location:

**Message from webpage**

? You are about to make this course withdrawn. This will RETURN the planned learners to the waiting list, and REMOVE the full learners from course. Do you wish to proceed?

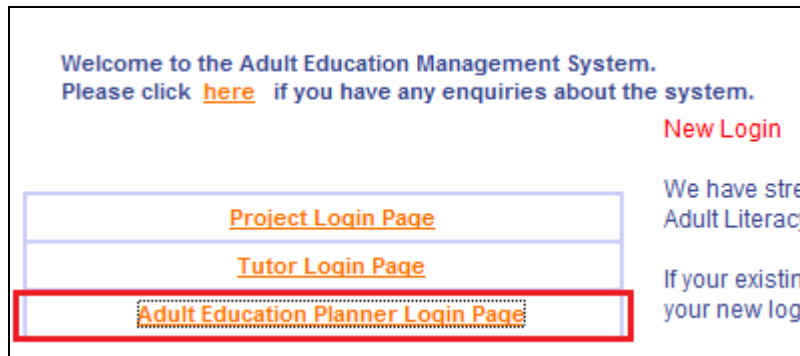
OK Cancel

You would click OK on this message to proceed.

# User Functions

## Adding in a new request in the Adult Education Planner

To add a new request into the Planner you go to the URL  
<https://www.success.ie/adulteducation>



You click on the Planner link shown on the left and you then enter your username & password & click the Submit button.

When you add in a new request you enter the persons details as shown below.

On the above data entry screen, you enter :

- Their Personal Details
- What the Preferred Programme would be such as BTEI, Literacy etc.
- Tick their profile & if they are Family Learning, Social Welfare etc.
- Any text comments for the learner.
- On the Left hand side, you then enter a request for the type of course they want to do. For example Advanced → Computers → Databases. You select the Subject Area and you then select their level, This is normally Beginner, Intermediate or Advanced. Finally you select the Requested module.

- You can enter as many requests as you like for the same person.
- On the right hand side, you can put a person directly onto a planned course. All courses that have been flagged as “Planned” by any of the projects such as BTEI or Adult Literacy will display in the calendar. They can be filtered by
  - Programme
  - Course
  - Course Code
  - Location
  - Venue
  - Keyword
  - Date range

You will note that as you enter details in the grey search fields that the search results will automatically refresh.

The date for the recording of the request defaults to today's date.

When you have entered all the details you click on the Enter button.

At this point if you have selected an actual course the person will be entered onto the module as a Planner learner and will instantly appear in the relevant programme that you select such as BTEI.

### Putting Learners onto individual modules.

If a Planned Course has more than one module you can click on the View Modules link and the individual modules will appear as shown below. You then have the option of ticking individual modules to put the learner onto the ones you have selected. In the sample below the learner will be entered onto the bottom two modules.

**Add Planned Course / Module**
Enter Search Criteria in Highlighted Field

Course Name:	<input type="text" value="care"/>	Location:	<input type="text"/>
Course Code:	<input type="text"/>	Venue:	<input type="text"/>
Module Name:	<input type="text"/>	Start From:	<input type="text" value="1"/> To: <input type="text" value="1"/>

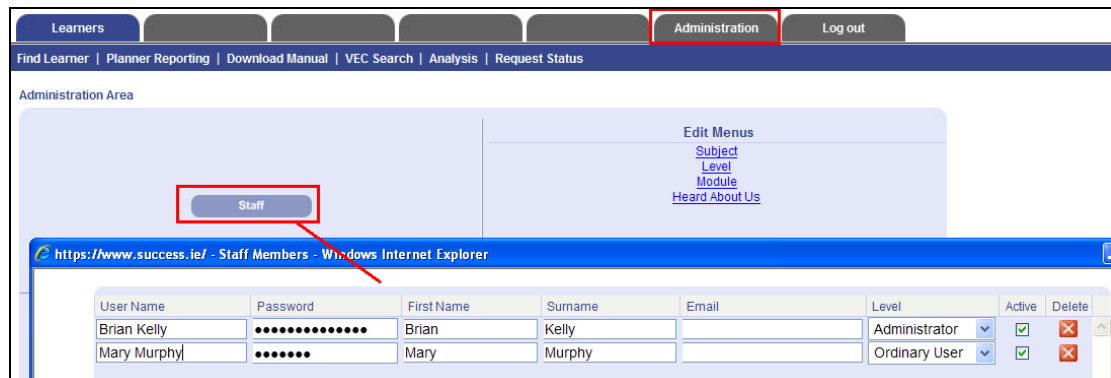
Programme	Code - Course	Start Date	View	
BTEI	123 - CEF COMMUNITY CARE	12/01/2009	<a href="#">View Modules</a>	<input type="checkbox"/>

Code - Course	Module - Ref. - FETAC level	
123 - CEF COMMUNITY CARE	Art/Design - AF0194 - Level 1	<input type="checkbox"/>
123 - CEF COMMUNITY CARE	Career Information - WF0006 - Level 3	<input checked="" type="checkbox"/>
123 - CEF COMMUNITY CARE	Caring for Children - DF0124 - Level 3	<input checked="" type="checkbox"/>

You would then click Close & Enter to save the person into the Planner.

## User Management

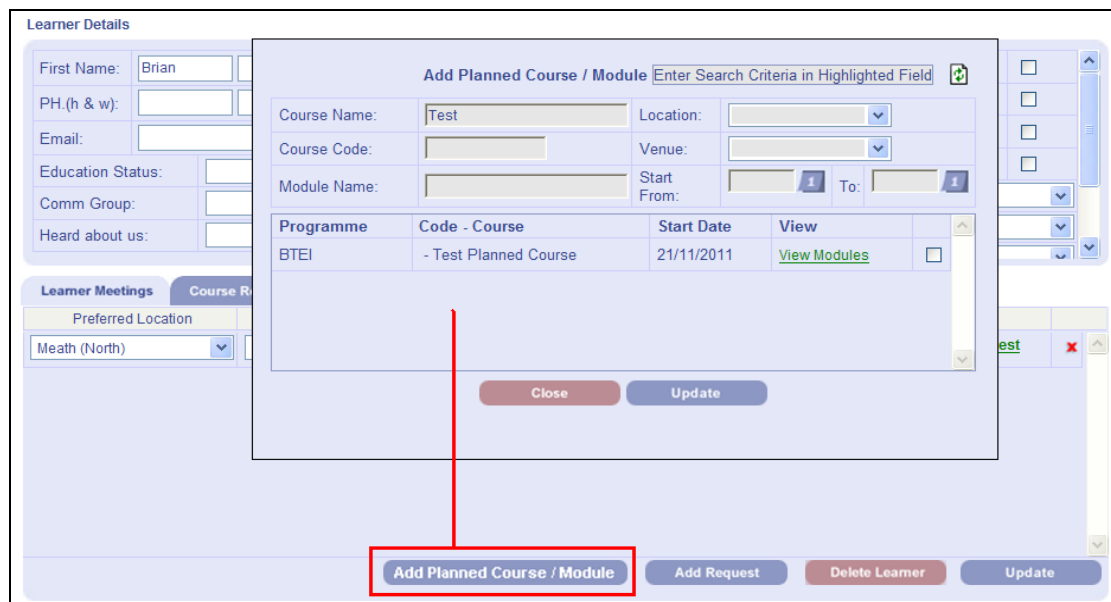
There is the facility under the Administration section to add and edit users.



You can set what level the user has access to which is either the Administration or ordinary user level. Administration level gives the user access to the administration section.

## Adding learners directly to a Planned Course

When you add a learner to the system you did have the facility to add them onto a Planned course. You can now add them onto a Planned course from their own screen by clicking the new button “Add Planned Course / Module”



A good way of assigning learner to courses is to use the View Request screen in the reporting section, filter your learners and then click on the individual links to the learners which will open a new window for each learner when you can click on the above link.

Course Request Report

Active / Non-Active : Both

18 Request(s) returned

Name	Programme	Preferred Location	Subject Area	Level	Date	Req. Met	Requested Module	Preferred Time	sw Recipient	Education Status	In Employ.	Comments	Logged By	Print Letter
<a href="#">1st Learner</a>	BTEI	Meath (North)	Subject - English	SE - Level 1	22/08/11	no			yes	FETAC L2 or Equivalent (full)	yes	aaa	Bernie County Planner	<a href="#">Print Letter</a>
<a href="#">2nd Learner</a>	BTEI	Meath (North)	Subject - English	SE - Level 1	22/08/11	yes	English Beginning		yes	FETAC L2 or Equivalent	yes	aaa	Bernie County Planner	<a href="#">Print Letter</a>

## Texting facility

We have incorporated the texting facility that has been in the main programmes into the Planner.

For this reason we have added a flag to prompt you to enter a mobile number for a learner when you add them to the system, as shown below.

Add a Learner

First Name: Brian

Surname: Kelly

Address 1:

Address 2:

Town:

County: County Meath

Phone/Mobile:

Email:

Edu. Statu:

Comm Gro:

PPSN:

Social We:

In Employ:

Add Requested Modules

Subject:

Level:

Module:

Preferred Prog.:

Preferred Location:

Preferred Time:

Heard about us:

Comments:

Add Planned Course / Module

Enter Search Criteria in Highlighted

Message from webpage

You have not entered a mobile number for this learner.

The VEC may need the mobile number to communicate with the learner. Do you still wish to add the learner without a mobile number?

Click OK to continue without a mobile number.

Click Cancel to add a mobile number for this learner.

OK Cancel

You can text an individual learner by clicking on the mobile phone symbol on the Learner screen as shown.

Learner Details

First Name: Brian

Surname: Kelly

PH.(h & w):

Mobile: 086 777777

You can send bulk texts to learners through the reporting section using the new Send Text button which is shown.

**Planner Reporting**

Date Range:	From: <input type="text"/>	To: <input type="text"/>	Heard about us:	<input type="text"/>
Quarter:	<input type="text"/>		S.W. Recipient:	<input type="checkbox"/> Family Learning: <input type="checkbox"/>
Preferred Location:	<input type="text"/>		In Employment:	<input type="checkbox"/> Priority: <input type="checkbox"/>
Subject Area:	<input type="text"/>		Medical Card:	<input type="checkbox"/> Early School Leaver: <input type="checkbox"/>
Level:	<input type="text"/>		Job Seek more than 3 months:	<input type="checkbox"/>
Progression:	<input type="text"/>		Writing Level:	<input type="text"/>
Requested Module:	<input type="text"/>		Numeracy Level:	<input type="text"/>
Preferred Time:	<input type="text"/>		IT Skill Level:	<input type="text"/>
Preferred Programme:	<input type="text"/>		Course Request Status:	<input type="text"/>
Education Status:	<input type="text"/>		Assigned to Project:	<input type="text"/>
Active / Non-Active:	<input type="text"/>		Logged By:	<input type="text"/>

Course	<input type="text"/>	Start Date	<input type="text"/>
Certification	<input type="text"/>	Start Time	<input type="text"/>
Venue	<input type="text"/>	Response Date	<input type="text"/>

Whenever you are using this bulk texting function you should always click the View Requests button first in order to check the number and the learners that you will be sending texts to.

As the Planner may be used by many programmes, the way the purchase of texts work is that they are integrated into the BTEI purchase scheme. In other words if Planner texts are purchased they are added to the BTEI volume of texts.

## Learner Meetings

The facility to add meetings has been brought across to the Planner.

**Learner Meetings** Course Requests

Number of Meetings: 1 Total time spent: 0.00 Hours

Date	Time	Purpose	Tutor	Session	Total	Notes
02/11/11	9:00 AM	Assessment		1.00		Met Brian at 9 and went through the course options

There is a new tab on the Learner screen called Learner Meetings. You can click the Add meeting Button, enter the details of the meeting including the time and duration if you wish. You can also add meeting comments like there attendance and what was discussed. You can any number of meetings for a learner.

Enter the activity details and click "Enter"

Date:	02/11/11
Time:	9:00 AM
Purpose:	Assessment
Tutor:	
Session:	1.00
Total Hours:	
Comments:	Brian turned up for meeting and we discussed his course options

## VEC Countywide Search facility



This facility was developed because learners were approaching the VEC saying that they had not been on any previous course while they might have been. The new facility lets you search by first or surname.

The search results will show the learner name and the beginning of the address so that you can distinguish between different learners.

The screenshot shows the VEC Search interface. At the top, there are tabs for 'Learners', 'Planner Reporting', 'Download Manual', 'VEC Search' (highlighted), 'Analysis', and 'Request Status'. Below the tabs is a 'Learner Search' form with input fields for 'Firstnames' (containing 'brian') and 'Surname'. A 'Search' button is to the right. Below the form is an alphabetical index 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z'. Below the index is a table of search results:

Name	Address	
Brian Kelly	12 Main Street	<a href="#">show courses</a>
Brian Smith	37 Tree lined Avenue	<a href="#">show courses</a>

Below the table is a 'Course History - Windows Internet Explorer' window. The address bar shows 'https://www.success.ie/adulteducationdev/course\_history.asp?cid=127231&plan=1'. The page title is 'Course History for Brian Kelly'. There is a 'Print' button and a table with columns: 'Programme', 'Course', 'Module', 'Start Date', and 'Date Completed'.

To the right of the learner details there is a Show Courses link that will display details of any courses that this learner has already registered for.

## New Course Request Status

A new Course request status has been added called "Accepted another VEC Course."

## Analysis of Learners by date

There is a Analysis link that allows you to enter a date range and then click the analysis button.

This will give a breakdown of the programmes that learners from the planner have been assigned to

The screenshot shows the 'Analysis' interface. At the top, there are tabs for 'Find Learner', 'Planner Reporting', 'Download Manual', 'VEC Search', 'Analysis' (highlighted), and 'Request Status'. Below the tabs is an 'Analysis' form with a 'Date Range' section containing 'From' (01/01/11) and 'To' (31/12/11) date pickers. Below the date range is an 'Analysis' button. Below the button is an 'Analysis - Windows Internet Explorer' window. The address bar shows 'https://www.success.ie/adulteducationdev/planneranalysisreport.asp'. The page title is 'Analysis'. Below the title is a 'Date range: From 01/01/11 to 31/12/11' section. Below this is a table titled 'Analysis - Enquiries Breakdown'.

Project	
Adult Literacy	2
BTEI	4
Community Education	0
County Wide	8
ESOL	0
External Teaching Service	0
Self Financing	0
Traveller Training Centre	0
VTOS	1
Youthreach	0
Total	15

At the bottom of the window are 'Print' and 'Close' buttons.

## Request Status Report

There is a new facility to report on the current status of requests. You can filter by Preferred Programme and by Subject Area. If you leave these options blank it will report on all requests.

Request Status - Breakdown	
Course Request Status	
Blank:	13
Accepted another VEC course:	0
Accepted Course:	1
Declined Course:	1
Offered Course:	0
Outstanding:	3
Unable to meet request:	0
<b>Total:</b>	<b>18</b>

If no status has been added for the Learner, they will be included as Blank or unclassified.

## Homepage Update

We have put in a new summary on the homepage as follows :

- Total number of Learners in the Planner
- Number of requests from these Learners
- Number of requests from main programmes (This is a total of all requests from the main programmes that do not have the Request Met tickbox ticked or who do not have Course Accepted in the Status dropdown)

PPSN No:

Location:

Total number of Learners in the Planner: 18

Number of requests from these Learners: 19

Number of requests from main programmes: 2