Course Manager

Help Guide
Section 1  Introduction

1.1  This document

This document is aimed at providers who need an introduction to, or need help with, Course Manager (version 2.0.5).

1.2  What is Course Manager?

Course Manager is a tool designed for learning providers to expand and increase their marketing reach. Course Manager enables you to add, update and archive courses online quickly and easily and at a time that suits you. Whenever you update your information in Course Manager, it is loaded into the National Learning Directory.

External quality audits show that information maintained by providers is more likely to be of better quality and more up-to-date.

1.3  Where will my courses appear?

The National Learning Directory (NLD) holds information on nearly one million courses from more than 9,000 providers. The NLD is accessed by the Careers Advice helpline and website, as well as around 70 partner websites including: Directgov, local nextstep sites and Sector Skills Councils.

Overall the NLD generates around 20 million searches per year across their network of websites. Below are some of the services that use the National Learning Directory.

**Careers Advice**
The Careers Advice website is the website for the National Learning Directory and offers impartial advice on courses, careers, funding and childcare. The free advice helpline also uses the National Learning Directory.

[http://careersadvice.direct.gov.uk](http://careersadvice.direct.gov.uk)

**nextstep organisations**
nextstep promotes learning and work to all adults aged 20 and over. Their services are available throughout England.

[http://nextstep.direct.gov.uk](http://nextstep.direct.gov.uk)
DirectGov
DirectGov is the one stop shop for all government services and has an extensive Education section that includes a course and provider search on the National Learning Directory.

Education UK
Education UK is the British Council website for international students looking to study in the UK.

Hotcourses
Hotcourses is the largest commercial educational publisher in the UK. Your courses can appear on the relevant Hotcourses.com websites including Hotcourses.com, Floodlight and HCStuff.

Other portals
There are other portals and services that use the National Learning Directory, for example Sector Skills Councils.

Employer Guide to Training
The LSC site for employers to view feedback on learning provision from other employers.

1.4 Do I need to read all this?
If you are new to Course Manager, we recommend reading this whole document. However, if you have different needs the following section might help guide you better.

I just want a quick refresher in Course Manager
If you are looking for a quick guide on how to use the latest version of Course Manager then you can view a visual tour of new features from the Course Manager website.
If you want an overview of recent changes from this guide then you should focus on the following areas:

Section 4.1: Technical requirements
Section 5 (whole section): The data table
Section 8.1: Courses home page
Section 8.2: The course finder
Section 8.3: The courses data table
Section 8.4: Grouping courses - reflecting your organisation
Section 8.6: Finished updating?
Section 9 (whole section): Tools

I want to find out more about the National Learning Directory
You can find out a lot more about the role of the National Learning Directory, the data entry standards and how it is maintained and measured here. http://www.advice-resources.co.uk/learningproviders/

I am having trouble and I really need to speak to someone
If you need help filling in any fields in Course Manager please contact us at coursemanager@learning-directory.co.uk or call us on 020 8600 0403.

I am a provider based in Scotland, Wales or Northern Ireland.
If you are based in Scotland, Wales or Northern Ireland please contact us at coursemanager@learning-directory.co.uk or call us on 020 8600 0403 to check how to update your course information.

I want to know more about the UKRLP
The National Learning Directory, managed by Careers Advice, is taking part in the UK Register of Learning Providers (UKRLP) initiative led by the DIUS. Each provider in the UK will be identified through a unique number called the United Kingdom Provider Reference Number (UKPRN). For more information on the UKRLP, please visit the UKRLP website. http://www.ukrlp.co.uk

1.5 Feedback

We always welcome feedback on how to improve our services. If you have any feedback about this document or any aspect of Course Manager please contact us at coursemanager@learning-directory.co.uk or call us on 020 8600 0403. Alternatively you can send us your feedback by completing the feedback form available on the Course Manager home page.
Section 2  How your courses are updated

2.1 Overview of the update process

Before we look at login and registration and how to use Course Manager, it is useful to look at how your courses are updated and how they appear on the Careers Advice website and other portals and sites that access the National Learning Directory.

A. Course Manager process

1. Provider starts amending courses
2. Provider finishes making changes and sends information live. For more on sending your information live see Section 8.6 – “Finished updating?”.
3. NLD team alerted to validate changes
4. Changes sent live within 3 working days.

B. Updates are sent live on the National Learning Directory

Updates appear at Careers Advice helpline centres in Manchester and Leicester
 Updates appear on Careers Advice website
 Updates appear on Connexions, nextstep, sector skills and other portals
 Courses appear on Career Advice DirectGov, Hotcourses, Education UK and associated websites.

2.2 How will my courses appear on the web?
Your courses will appear slightly differently, depending on the portal but the fields and information will be the same. To make it easier for users to make an informed decision about a course, please fill in as much detail as possible.

Figure 1: Example of a course detail page with all fields completed.
Figure 2: Example of a course detail page with only minimal information
Section 3  Login and registration

3.1 How to access Course Manager

To login or register on Course Manager, go to the following address.
www.learningdirectory.co.uk/coursemanager

You will see the following page:

![Login Page](image)

It is FREE to list your courses and they will appear on over 70 websites.

Frequently asked questions:

I am a higher education institution who supply their courses to UCAS - Can I still register with the Learning Directory?

I am based in Scotland, Wales, Northern Ireland - Can I still register with the Learning Directory?

Figure 3: Login Page

3.2 New providers

Search and check
Before you register on Course Manager, please check that you are not already on the National Learning Directory. You can do that from the login page – Step 1: Search and check. This will redirect you to the Careers Advice website where you can search to see if your institution already exists on the National Learning Directory.

If you find your institution, please contact us to get your login details at coursemanager@learning-directory.co.uk or call us on 020 8600 0403. If you do not find your details when searching on the National Learning Directory, but you have been trading for a while, before registering, please contact us to confirm if you need to proceed with registration.
**Please note:** To be searchable on the National Learning Directory you need to have at least one course live. A course remains live for twelve months only. If you do not change any information within that course or you do not renew that course just before the year is over, this course will be archived.

**Registration**
Registration is simple but you will need to know key information about your institution before you begin.

1. Click the “register here” link in Step 2 on the login page. (See figure 3).
2. If you are a registered UKRLP provider please enter your organisation’s United Kingdom Provider Reference Number (UKPRN)
3. If you are not a registered UKRLP provider, you will need to complete the UKRLP registration first.
4. Once UKRLP registration is complete, you will be automatically redirected back to the Course Manager registration page, where most required details will be prepopulated for you.
5. Fill in all required fields and press submit.

### 3.3 Existing providers

To log in, simply enter your email address and password in the Step 3 box of the login page. (See figure 3).
Section 4  The home page

4.1 Technical requirements

To use Course Manager we recommend that you have the following:

- Reasonable internet access (128kb/sec or more recommended)
- Reasonably up-to-date browser
  - Internet Explorer 6.x or above.
  - Firefox 2.x or above.

Course Manager is best used with a Windows PC, IE6 on a broadband connection with a monitor size of 1024x768.

Course Manager uses pop-up windows. If you have a pop-up blocker on then you will not be able to view data correctly. Please contact your network administrator if you are having issues viewing pop-ups.

4.2 Overview

The home page is designed to enable easy navigation and access to all the major parts of Course Manager.
Course summary
A handy overview of the courses we hold on the National Learning Directory for your college. The page gives an outline of how many courses you have and their status:

- **Total**: The number of your courses that are on the National Learning Directory
- **Unchanged**: The number of your courses that are live on the National Learning Directory
- **Changed**: How many courses you have changed in Course Manager
- **Renewed**: How many courses you have renewed
- **New**: How many new courses you have entered
- **Archived**: Courses are archived when they have not been updated for over a year or a user has manually archived them.
- **Warning**: Course Manager will warn you if you have courses that are near to “dropping off” the National Learning Directory because they have not been updated for over a year. These courses will become unavailable to learners and drop into your archived courses.

**Please note**: Courses status gets updated each time you send changes live

Contact us
Displays the contact assigned to your regional area. Using these contact details means that you should get the most specific and knowledgeable help available to you.

There are few additional pods on Course Manager home page that are designed to help you use the application; Help, Feedback, Related Info.

4.3 Navigation bar

The navigation bar is present on every page and allows you to access all areas of Course Manager. Simply roll over the text and you will see various options appear that are relevant to that section.

Here is a quick summary of the options from left to right. More information about the areas themselves is in further sections within the document.

**User information**
At the top left-hand corner, Course Manager displays your user name, college name and UKPRN. You can amend your login details by clicking on “Update my login details” link top right-hand corner.

**Logo**
Clicking on the Course Manager logo will always return you to the homepage.

**Main details**
Use main details to amend the information that appears about your institution such as the organisation name, main address and the contact details for students.
My venues
Amend the information about where your courses are held.

My courses
Allows you to add and amend the actual courses or learning opportunities that you offer.

Tools
From here, you can create/amend your groups and you can access the Print Summary and Customised Report. If you are a learndirect Centre, from here you can also select the learndirect courses you provide.

Help
Provides access to all help documents and contact details as well as more information on the National Learning Directory.

Provider status information
The provider status information has been developed to give you more control over your data update process allowing you to make several changes over several days and send your data live in one batch. For example, a provider can work on next terms courses early without sending them 'live' on the National Learning Directory. This area informs you at all times of your provider status.

Please note: Unless you click on send my changes live button you latest amendments will not be searchable.

4.4 Where do I start?

For users entering their data for the first time we recommend you follow the order of the buttons in the navigation bar i.e. main details, venues, courses.

We also recommend that you take a quick Look at our virtual guide before you begin, to acquaint yourselves with the basic features of Course Manager in a visual way.
Section 5  The data table: How to amend your information

5.1 Overview

All of your course, venue and contact information is held in a table called the data table, which shows your information in a series of tabs, columns and rows.

The purpose of the data table is to let you work on multiple records at a time, allowing you to order and group your information in a way that makes it easier for you.

![Main details data table](image)

Although there are differences depending on the type of information you are amending the following principles always apply.

5.2 Required and recommended tabs

In order to break down the amount of information to make it easier to use, the information is separated out between two tabs, required and recommended. The required information tab shows the most important information that is necessary for the National Learning Directory. Within the tabs, mandatory columns are shown in red.

Recommended information is not mandatory but will greatly increase the information available to learners using the National Learning Directory, benefiting their decision-making process.

5.3 Columns

Each column has a name. Mandatory columns are red, the others are black. In the courses and venues data table, if you click on the column name the data will be re-ordered by that column in ascending order. If you click again the data will be re-ordered in descending order.

![Example column with options to re-order, help and close](image)
5.4 Context specific help

All of the columns have a help option that will assist you with entering the information.

Figure 7: Contextual help icon

Clicking on this icon will give you information about how best to complete this field. This context-specific help is available in all columns in the data table.

5.5 Multiple column ordering

If you would like to order by multiple columns – for example course title and study mode – click on the arrow on the right of each column you wish to order first. Then click on the arrow of the second column. The direction of the arrow informs you whether the order is ascending or descending and the number that appears next to it tells you which column is ordered first and which is ordered second.

Figure 8: Multiple column ordering shows you the direction and the order

5.6 Hiding columns

You can hide each column by clicking on the small cross on the right of each column.

Figure 9: Hide a column by clicking the cross.

The column will be immediately minimised but can be easily restored by clicking on the maximise button.

Figure 10: Click on this icon to restore the column.

If you have minimised several columns you can hover over the maximise icon and it will tell you the specific column name.
5.7 Viewing and editing information

Your information should be displayed in the data table but sometimes not all of the information is visible. Dynamic tooltips show you the full information when you place your mouse over the field.

![Course Title](image)

*Figure 11: Tooltip shows all the information*

To amend information, simply click on the field itself and you will see a new pop-up window.

![Qualification Title](image)

*Figure 12: Example of amending information in a pop-up*

Press “Submit” to accept any changes that you have made or press “Close” to cancel. Once the pop-up window closes please save your changes. (Please refer to section 5.9)

5.8 Status icon

The status icon is an important feature of Course Manager and quickly tells you what has happened to the record you are working on. The status icon appears at the left of each row in the data table.

- **✓** Unchanged record. This record has not been amended since your data was last sent live.

- **=** Changed record. This record has changed since your data was last sent live.

- **D** Duplicate record. This only applies to courses but this shows when you have duplicated a course from an existing course. For more on duplicating courses, go to the my courses section.
New record. When you create a new venue or course, this icon will be displayed next to it.

Renewed record. This is an existing course (archived or live) that you have chosen to renew.

Archived record. When you archive a venue or a course, this icon will be displayed next to it.

Record with errors. If you save your changes, and there is a mandatory field that has not been completed, then you will get this icon next to the record in question. This status will also appear if the course start date you have entered is in the past.

When there is an error next to the record, the specific field will have a red triangle to inform you of the specific area with the problem.

Records with warnings. If you save your changes, and Course Manager thinks that you should double-check something, then you will get this icon next to the record in question.

When there is a warning next to the record, the specific field and tab will be highlighted to inform you the specific area with the problem.

You do not need to learn these - If you hover your mouse over the icon, it will give you a written description.

Please note: You can order your courses by status in the normal way, you are also able to search within Course Finder on records by their status. For example, you can search on all your archived courses.

5.9 Saving your changes

As you work through the data table, open pop-ups and work with each tab your changes are saved locally, but are not written to the database. To save your changes to the National Learning Directory you must press the “Save” button.

Figure 13: Use this button to save your work as you go.

You should save regularly. Once you have completed the required fields press save.

Course Manager then highlights all the fields that you have changed so that you have a clear record of what you have done.
Figure 14: Changed records are highlighted to show what you have done.

Please note: Although we have split the required and recommended fields, we strongly recommend you complete as many of the optional areas as possible to help users who may be interested in your courses.
Section 6  Main Details

Use the Main Details areas to amend the address and contact details of your institution. Most of this will already be pre-populated from the registration process.

Figure 155: Main details
Section 7  My venues

7.1  Overview

Use “My venues” to amend the information about where your courses are held.

If you have more than one venue in which courses are held, it is easier to enter all the venues first.

The first venue is automatically created when you register and it matches the main college site. This is called the admin site and will always be represented in bold.

To add a venue, simply click on “Add Venue” button. With Course Manager you can sort your venues alphabetically by clicking on the column title.

To archive a venue, simply click on the checkbox to the left of the venue, and press the “Archive” button. The status of the venue will change to “A” for archived. Be aware that if there are live courses attached to that venue, they will be archived too. You will receive a warning pop-up window, where you will have an option to re-attach those courses to another venue or to proceed and archive these courses.

![Figure 15: Reassigning courses to another venue](image)

7.2  Entering venue information

Course Manager incorporates many of the National Learning Directory data entry standards and in most cases will indicate when data has been changed, entered wrongly or when a record has been archived or deleted. When you save your changes, you will see a status icon in front of every row, which keeps you, informed of the status and whether there are errors.
There are four columns where you can enter detail, two of them are mandatory and their column titles are red.

**Venue name**

Venue name contains the name of the venue. By clicking in the field, a new pop up window will open where you can type in the venue name or you can select one of the options from the dropdown list.

![Figure 16: Amending venue details through the venue name pop-up](image)

There are instances where a course may not have a fixed venue, or it might perhaps rely on the client’s own premises in order to offer training. In this case, the ‘Course Venue’ name field can be left blank and one of the options can be selected from the drop-down box instead. The options are described below:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work based training</td>
<td>Use for apprenticeships and some NVQs, part or all of the training takes place in an industry/professional environment.</td>
</tr>
<tr>
<td>Venue to be confirmed</td>
<td>If training or learning is going to take place and the area but not the specific location is known.</td>
</tr>
<tr>
<td>Online</td>
<td>The majority of the learning takes place using the Internet.</td>
</tr>
<tr>
<td>Self study</td>
<td>Where the learning is completed in the students own time, often in a distance-learning package or online.</td>
</tr>
<tr>
<td>At client site</td>
<td>Training aimed at businesses and their employees. The learning may be tailored to meet the client’s requirements.</td>
</tr>
<tr>
<td>On Location</td>
<td>Where the learning takes place outside a normal learning environment, for instance residential courses, archaeological digs or field trips.</td>
</tr>
<tr>
<td>At other venues to suit the client or learner</td>
<td>Where providers run courses to meet the customer’s requirements, for example the provider will go to a venue of the client’s choice, or the provider will give tuition at the client’s or learner’s home.</td>
</tr>
</tbody>
</table>

Once you have selected the option from the list you will need to specify the region by selecting your area from the second dropdown list.
Please note: You can only have your venue name typed in or select from the dropdown list, you cannot enter/select information in both fields at one time.

Address
Address is the second mandatory field. According to the venue, you can enter a postcode and perform a search, which will populate your address.

Please note: You do not have to enter any address details if your venue was selected from the dropdown list; the system automatically populates town and region based on your non fixed venue choice.

Venue description
Enter a brief description of the venue's support facilities. This is not a mandatory field, but we recommend that you complete the information, as it is valuable for students. Advisers at the Careers Advice helpline are often asked if a provider offers childcare, has disabled access etc so the more information you provide, the better.

Learner support
Tick the boxes to indicate whether you offer any of the listed services at the venue. This information will appear next to every course at this venue within the various portals so it is a quick way to reveal the services you offer to learners.

Figure 17: Course detail on the Careers Advice site with completed Learner support
Section 8  My Courses

My courses is probably where you will spend most of your time in Course Manager so it’s useful to be aware of how some of the more advanced features work so you can save yourself the most time.

8.1 Courses home page

Here you are given the option of finding a course using the “Course Finder”, viewing all courses or adding new courses.

Please note: You will only have the option to view all courses if you have less than 300 records.

You can also view your courses alphabetically. This searches on courses beginning with the selected letter in your course title.

Figure 18: My Courses Page

8.2 The course finder

The course finder allows you to search for your courses. You can find your courses using one or a combination of the following criteria:
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keyword</td>
<td>Enter a keyword and it will search on the course title of the course. (Not the description). If you enter in three letters of your course a drop down will appear of all the relevant courses. You can select a course to view one course at a time or simply click outside of the drop down menu to remove it.</td>
</tr>
<tr>
<td>By subject category</td>
<td>These are the top level subjects from the National Learning Directory Category System (LDCS) and are assigned to each course by a member of the NLD data team when your courses are validated. Simply select a category to search on that subject. For more information on LDCS go to the following URL: <a href="http://www.advice-resources.co.uk/learningproviders/standards/">http://www.advice-resources.co.uk/learningproviders/standards/</a></td>
</tr>
<tr>
<td>By study mode</td>
<td>Search on the study mode of the course (attendance pattern). The list is based on the National Learning Directory data entry standards. For more information on the National Learning Directory ‘Data Entry Standards’ go to the following URL: <a href="http://www.advice-resources.co.uk/learningproviders/standards/">http://www.advice-resources.co.uk/learningproviders/standards/</a></td>
</tr>
<tr>
<td>By my groups</td>
<td>You can search on the groups that you have created. Groups are your own way of categorising your courses so that you can easily search and find your data. For more on groups, see “Grouping courses – reflecting your organisation” in this section (8.4). This list will be automatically updated when you create a new group.</td>
</tr>
<tr>
<td>By qualification</td>
<td>Searches on the qualification of all the courses. The list is based on the National Learning Directory data entry standards. For more information on the National Learning Directory ‘Data entry standards’ go to the following URL: <a href="http://www.advice-resources.co.uk/learningproviders/standards/">http://www.advice-resources.co.uk/learningproviders/standards/</a></td>
</tr>
<tr>
<td>By venue</td>
<td>Searches on courses at the specific venue you have chosen. This list will be automatically updated when you create a new venue.</td>
</tr>
<tr>
<td>By last update date</td>
<td>You can search on the months when you last updated your courses. Your updates are grouped by month so if you updated your courses on 26th Jan 2008 and 6th Mar 2007 then your last update would be 26th Jan 2008.</td>
</tr>
</tbody>
</table>
update date drop down options will be:
- Jan 2008
- Mar 2007

If courses have not been updated for over a year, then they will drop off the National Learning Directory and will be automatically archived. This search is a useful way of making sure your courses remain searchable and are up-to-date.

<table>
<thead>
<tr>
<th>By status</th>
<th>You can search on the status of your courses at any moment in time including archived or new courses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>By start date</td>
<td>If you have put in an actual start date, you can search on courses that have that date before or after a date you pick. Select the drop down menu for before or after and you can then enter the date field.</td>
</tr>
<tr>
<td>By your course ID</td>
<td>If you have entered your own course ID or unique identifier, you can enter that in directly here and find the course or courses that match.</td>
</tr>
</tbody>
</table>

After pressing “Search” your courses will appear in a data table to the right of the course finder. Your search criteria will remain in the course finder. To easily wipe this search from the course finder, click “Clear”.

If you have run your search, and you do not need the course finder for a while, you can hide it to make more room for your data table. You can do this from the Course menu in the navigation bar or by using the cross (i.e. “X”) in the title of the course finder pod.

### 8.3 The courses data table

There are subtle changes to the data table for courses that are worth pointing out so that you are aware of all the features.

Firstly, many things are the same. To add a new course, simply click on “Add New” button. Ordering information is the same as in previous sections and there is still help for each column.

**Create more space, hide the course finder**
Space is at a premium so Course Manager allows you to hide the course finder to create more room to view your courses. To do this, simply click on the cross on the right of the course finder heading, or from the navigation click on My courses tab, “Show/Hide course finder”.

To bring the course finder back, simply click on the arrow on the right hand side of the page or from the navigation click on My courses tab, “Show/Hide course finder”.

The preview tab
You will quickly notice that the courses data table has three tabs – one of them called “Preview”. This allows you to preview the course you have entered in the look and feel of portals that show your information.

Currently, you can view your courses in the Careers Advice website look and feel. The information will more or less be displayed how it will appear when your changes are sent live.

Please note: You can only preview courses when you have saved changes. If you create a new course and try to preview, it will not be visible.

Pagination
The courses data table shows 20 courses per page. If your search generated more than 20 results, the pagination buttons will appear.

- Takes you to the next page of results
- Takes you to the previous page of results
- Takes you to the beginning – the first page of results
- Takes you to the end – the last page of results
- Allows you to pick the page and go directly to that page

Duplicating courses
Duplicating a course is a handy short cut if you have several similar courses that differ slightly. If for example you have several Spanish courses where all the information is
same apart from the duration, simply click on the checkbox of a completed Spanish course and press duplicate. The number in the drop down refers to how many duplications you want.

![Duplicate](image)

*Figure 20: Duplicate existing courses to save time*

The duplicated course will appear with a status of “D” for duplicated. You can then make small changes to the new course (such as the duration) without re-entering all of the information again. Once you have made changes to the duplicated course please save your changes.

**Archiving courses**

Archiving courses is the same as archiving a venue. Simply click on the checkbox next to the course and then click the archive button. Archived courses are fully searchable and amendable and are a useful way to switch courses on and off from learner portals without having to delete them permanently. Used correctly, the course archive can save you a lot of time.

When you make any change to an archived course, it will become un-archived and given a status of changed course. It will then be sent live to the National Learning Directory with all your other changes.

**Renewing courses**

Sometimes you will have courses that do not change year on year but you would still like to resubmit them to the National Learning Directory. For example, you may have courses with flexible starts and negotiable prices that do not need amending over time. To resubmit to the National Learning Directory simply check the box for that course and click “Renew”.

If courses are already changed or if they are new, then you do not need to renew them.

**Global changes**

Global changes is a very powerful feature that allows you to amend several courses at once. Simply click the box “Global” in your current view and you will be taken through the Global changes wizard.

*Global changes Step 1: Set-up*

Immediately opens a pop-up that explains how global changes work. You can choose to change all your courses in the dataview or just those you have selected.
You will be asked which column you would like to globally change. In this example, we will use price but you can select from all your course pop-ups.

Pressing proceed will take you to step 2.

**Global changes step 2: Amend data**

You will then be taken to the relevant pop-up for the column you have selected. In this example, we selected to change start date, so we would get the following pop-up.

Simply make the change to the pop-up that you would like applied to all your courses and press “Submit global changes”. This will take you to step 3.

Pressing close will cancel the global changes wizard and close the pop-up.

**Global changes Step 3: Confirmation**

The final step of global changes simply confirms the changes you have chosen to make to your courses. Read carefully through the summary and press “Submit global changes” if you wish to proceed.
The data view will now be refreshed and your global changes will be applied to the screen.

**Please note:** Your courses are not saved yet! To save your changes press “Save”. If you do not like the change you have made, then navigate away - e.g. search again – and press OK when the alert box pops up. Your changes will not have been saved.

**Clone**

Cloning is a similar feature to duplicating a course. If you run the same course at different venues you can save yourself time by creating one course and cloning it across all or several venues.

Select the courses by ticking the checkbox in front and click on the ‘Clone’ button. Once the pop-up window uploads select your choice and press submit.

The new courses will be attached to the selected venues and will have a “D” status. Please remember to save your changes.

![Figure 23: Cloning courses across several venues](image)

### 8.4 Grouping courses – reflecting your organisation

Course Manager allows you to group and arrange your courses in the way that seems easiest for you to use. As well as the flexible ordering options in Course Manager, we have also added the ability to put your courses into folders or “Groups”. These groups can reflect your prospectus, or can be the departments that your organisation contains. Groups only exist within Course Manager and learners will not see them so they can really be what you want to make things easier for you. Example groups might be subject-based e.g. art, drama, languages or qualification, study mode or a combination of all three.

Once you have placed your courses in groups, you can search on those groups and view all the courses that are in that group.
You can also classify your courses in groups by ticking the box in front of the course(s) and selecting the group from the dropdown list.

**Creating a group**
First, you need to create groups that mean more to you and your organisation.

Click on the navigation bar Tools tab, Add / amend groups. From here, you can create new groups, rename or delete existing groups.

![Add / amend group](image)

Create groups to organise your courses in ways that mean more to your department, or by the chapters in your prospectus. You can then easily find the courses you are looking for.

Simply create a group below, and organise your courses into groups.

Create a new group: [Create]

![Figure 24: Create groups that reflect your organisation’s categories](image)

Once you have created your groups, they will immediately appear in your course data table.

**Please note:** If you delete a group, it will not delete the courses assigned to the group but it does mean that the courses will no longer be assigned to any group.

**Putting a course in a group**
To put a course in a group you need to have searched on the appropriate courses and have them in your data table. Simply click on one or more checkboxes of courses and go to the “Put in group” drop down menu at the top left of your data table. On selecting a group from the menu, the courses will be assigned to that group.
Removing a course from a group
You can remove a course from a group simply by selecting the “Remove from group” option in the group drop down. This will remove all selected courses from the group they are in.

Alternatively you can remove the group altogether (Tools tab).

Viewing groups
You can view which course is in which group in the recommended tab. If the group column is blank then they do not belong to a group.

Alternatively, you can use the course finder to search on a group and all the courses assigned to it will populate your dataview.

8.5 Entering course information

Course title
When entering a course, always start with the subject followed by level and its qualification - Care Skills Level 3 Advanced Diploma; English Language GCSE; Maths AS Level; Construction NVQ Level 4. If the course has an awarding body other than that of your institution, then you turn it into an acronym and place it in brackets at the end e.g. English GCE A Level (AQA) for the Assessments and Qualifications Alliance. This field has a character limit of 125 character.

Venue
You will need to attach an appropriate venue from the drop-down list. This list is automatically populated from the venues you have created. Should you require an additional venue you can create it from here.
Please note: If the new venue you have created has a fixed address, you will still need to enter a valid postcode in ‘My venues’ tab before you send your changes live.

Start details
If you have a specific date, enter it in the top box of the Start date section. Enter in the DD/MM/YY format e.g. 09/10/07. Click on the “multiple dates” box if you have multiple start dates and wish to add more. If you do not have, specific dates tick the tick boxes where appropriate or select from the dropdown list.

![Start Date](image)

Figure 26: Amending start date details

Study mode
Firstly, select from the drop down box the course’s type of study. Either
- Face to face
- Self study with attendance
- Self study without attendance

If you have chosen face to face, you will need to select one option to define the type of face to face learning. The options available are:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full time</td>
<td>Where 16 hours or more of learning takes place in a week and the course runs for longer than a week.</td>
</tr>
<tr>
<td>Part time</td>
<td>Where the course involves either sessions in the evening and during the day, or where the timetable is yet to be confirmed. If the bulk of the course is in the evening but it starts before 17.00 then it would still be assigned part time e.g. 16.40 – 18.40.</td>
</tr>
<tr>
<td>Part time day</td>
<td>Where the course takes place before 17.00.</td>
</tr>
<tr>
<td>Part time evening</td>
<td>Where the course takes place after 17.00.</td>
</tr>
<tr>
<td>Day/Block release</td>
<td>Where the student is employed full time, and attends at set times during work hours. May involve work-based assessment.</td>
</tr>
<tr>
<td>Weekend</td>
<td>For any course where the majority of the learning takes place on a Saturday or Sunday.</td>
</tr>
<tr>
<td>Short</td>
<td>Where the learning opportunity is completed in a week, can be short as half a day.</td>
</tr>
<tr>
<td>Customised</td>
<td>Where the attendance can be customised to suit the student.</td>
</tr>
<tr>
<td>Sandwich</td>
<td>Where a significant, continuous, period of the course is spent in</td>
</tr>
</tbody>
</table>
By selecting Self-study with or without attendance, some tick boxes will appear. Tick options to define the types of self-study:

- Audio cassette/CD
- Video/CD
- TV/Interactive/Digital TV
- Online
- Computer based
- Non-computer based.

Please note: You cannot select the computer based and non-computer based options together.

Price

The price field is always in pounds sterling, and should cover details of any VAT, concessions or extraneous charges. If the course is free, please state this. If there is no set price or if the price has not been set yet, then please enter “Unavailable” or “To be confirmed”. The length of the text should not exceed 2000 characters.

Qualification

For the qualification section there are drop-down boxes and a text box. Select a qualification from those on offer e.g. NVQ, Course Certificate, Other Awarding Body, A/AS Level or Equivalent, etc.

If your course has a qualification that is awarded internally, you should select ‘Course Certificate’. If an external body accredits it then you choose ‘Other Awarding Body’.

The qualification title is a free text field and it should not exceed 240 characters. The qualification title is simply a reversal of the course title: NVQ Level 4 in Construction; Certificate in Care Skills; GCE A Level in English Literature. It is usually ‘Qualification name (level)’ in ‘Subject’. If there is an awarding body please select the appropriate one from the drop-down box listed below.

Duration

For the duration section there is a drop-down box and a text box. Select duration from those on offer and enter the complete duration of the course. If during the course you have 5 hours of lessons, but these are spread over 5 weeks then the duration will be 5 weeks, not 5 hours.

Examples: 4 hours; 9.5 days; 3 years; 1 - 2 days; up to 4 years.

If there is no set duration, please enter one of the following:

- Self paced
- To suit the client
- To suit the individual
- Variable
- By arrangement
- Different durations available
Course contact
Please enter a contact point for this course up to a maximum of 80 characters. Where possible a job position or the name of a department only should be used in this field because individual names can change frequently.

Course description
This is a free text field and should not exceed 2000 characters. The course description is a useful box that can give a student an overview of the course. It can contain elements such as what modules might be studied, or what the student can expect to get out of the course. Information that can be providers in existing columns, such as timetable or price should not be recorded here.

Timetable
The timetable field allows you to enter the times in which the course will take place. The format is always in the 24-hour clock and can include days of the week e.g. Monday 09.00-12.00; Tuesdays and Wednesdays 19.00-21.00; Thursday or Friday 17.00-18.40, etc.

Target Group
Target group is used to record if the course is aimed to a particular audience. The following options are available on the dropdown list:

<table>
<thead>
<tr>
<th>Business</th>
<th>Choose this if aimed at businesses and their employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Choose this if aimed at the general public</td>
</tr>
<tr>
<td>Schools</td>
<td>Choose this if the individual course studied only as part of a full time programme at a school or sixth form college (not at universities or colleges). For example, A Levels, GCSEs.</td>
</tr>
</tbody>
</table>

If a course is aimed both at business and at the general public, you need to enter the course twice, by using the duplicate course option and changing the target group accordingly.

Entry requirements
An entry requirement covers any specific requirements for a student to attend a course, such as four A Levels for an undergraduate degree course etc. Here you may also highlight the specific target audience for your course. This field has a limit of 2000 characters.

Assessment method
Assessment method covers areas such as whether there are exams or coursework to be completed, or if there is some form of practical method of assessment. If there is none, this field can be left blank. This field has a limit of 2000 characters.
Equipment required
Equipment required relates to any equipment or requirements that the learner may need. This field has a limit of 2000 characters.

Language
By default, the language is set to English, but if the course is taught in other language please specify.

T2G
This field should be used to indicate whether a provider is an LSC contracted Train to Gain provider. Train to Gain is a new service which is being rolled out nationally by the Learning & Skills Council (LSC). It has been designed to help hard to reach businesses get the training they need. A number of providers in each of the nine English regions have been contracted to deliver this service on behalf of the LSC.

Please note: This field is not editable to all providers.

Learner Account
Adult Learner Accounts (ALAs) are designed to give learners greater choice and control over their learning. Learners eligible for an ALA will have access to free independent advice and guidance so that they choose the course that best meets their needs. A number of LSC providers have been awarded contracts to deliver ALA provision. ALA providers have access to the ALA field in course manager and can ‘tag’ and ‘untag’ provision as applicable.
To find out more about ALA or if you are an ALA provider but are not 'tagged' as such on course manager, please contact adultlearneraccounts@lsc.gov.uk.

Your Course ID
This is a chance to store all your own course code or identifier against the National Learning Directory. This means that you can easily find your course from the course finder one by one greatly improving your ability to find and organise your data. Your course ID is not shown on any learner-facing portals that use the National Learning Directory and is largely for your reference only.

Group
This is the group your course is assigned to. For more on groups see above in Groups – reflecting your organisation: 8.4.

Last update date
This is the date when your course was last published live. Courses “older” than 12 months - i.e. have not been updated over 12 months – will be archived and removed from the public facing websites that use the National Learning Directory.
8.6 Finished updating?

When you have finished updating it is important that you notify us of the changes that you have made by clicking on the “Send my Changes Live” button. This does not have to be at the end of the day (although it can be) but when you have finished with the update and would like these changes to go live.

When you first started making changes, you may have noticed the provider status button appear at the top right of the screen.

![Status: You have made changes what's this? Send my changes live](image)

*Figure 27: Sending changes live*

Once you send your changes live a member of the National Learning Directory team will automatically be notified and your changes will go live within 3 working days of informing us.

**Please note:** You will not be able to use Course Manager while your changes are being validated.

**Forgotten to tell us?**

If you fail to send your changes live by clicking on “Send my changes live” button, then your updates will not be published live on the National Learning Directory. If you do not receive an email within three working days since you make your changes please log in to Courses Manager and click on “Send my changes live” button.

**Email notification**

When your changes have been validated and sent live on the National Learning Directory you will receive an email (to the login account email address) informing you of the changes that have been made and sent live so that you can immediately check that your courses on the live portals and you are happy with the published information.
Section 9  Tools

9.1  Add / amend group

Create groups to organise your courses in suitable categories that mean more to you and your organisation. For example, you could organise your courses by departments or by the chapters in your prospectus. You can then search by your groups, allowing you and other members of your organisation to easily find the courses you are looking for.

For more details on organising your courses into groups, view section 8.4.

9.2  Print report

The print report gives you a full printable list of your courses with the most important fields. Not only can you use this functionality to get an easy report of what courses Course Manager/NLD has from your organisation, but also to view your courses one by one. Clicking on the course title will take you straight into the course data table where you can view the information in a linear fashion.

Click on the column headers to order and sort your data. By going to customised report you can select the fields that you wish to view.

<table>
<thead>
<tr>
<th>Status</th>
<th>Your Title</th>
<th>Study Mode</th>
<th>Qualifications</th>
<th>Price</th>
<th>Start Details</th>
<th>Last Update Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Tailored course in management</td>
<td>Full time</td>
<td>No Qualification or Certificate of Attendance</td>
<td>£200</td>
<td>Oct-07</td>
<td>28/12/2006</td>
</tr>
<tr>
<td>✓</td>
<td>Tailored course in health and safety 1</td>
<td>Full time</td>
<td>No Qualification or Certificate of Attendance</td>
<td>£200</td>
<td>Nov-07</td>
<td>28/12/2006</td>
</tr>
<tr>
<td>✓</td>
<td>Tailored course in management</td>
<td>Full time</td>
<td>No Qualification or Certificate of Attendance</td>
<td>£200</td>
<td>Nov-07</td>
<td>28/12/2006</td>
</tr>
<tr>
<td>✓</td>
<td>Tailored course in management</td>
<td>Full time</td>
<td>No Qualification or Certificate of Attendance</td>
<td>£200</td>
<td>Nov-07</td>
<td>28/12/2006</td>
</tr>
<tr>
<td>✓</td>
<td>Tailored course in health and safety 1</td>
<td>Full time</td>
<td>No Qualification or Certificate of Attendance</td>
<td>£200</td>
<td>Nov-07</td>
<td>28/12/2006</td>
</tr>
<tr>
<td>✓</td>
<td>Tailored course in health and safety 2</td>
<td>Full time</td>
<td>No Qualification or Certificate of Attendance</td>
<td>£200</td>
<td>Nov-07</td>
<td>28/12/2006</td>
</tr>
</tbody>
</table>

Figure 28: Use the print report as a handy summary of your data or to access your courses one by one.

9.3  Import courses from learndirect master prospectus (learndirect Centres only)

If you are a learndirect centre, you can easily select your courses from this year’s prospectus, without having to re-enter the information.

Stage 1
Simply check the courses you provide from the list and press "proceed to Stage 2" when you are finished.

**Stage 2**

In Stage 2 you will need to assign the select courses to a venue. You also need to choose either to replace the existing courses with the new selection or add the selected courses to the current live courses. You will see a final confirmation of what you have done before you can click on the "Import" button. The checked courses will be automatically be added to your Course Manager where you can make bespoke changes, if you need to.
### 10.1 Glossary

<table>
<thead>
<tr>
<th><strong>NLD or National Learning Directory</strong></th>
<th>The National Learning Directory provides information on over 1,000,000 courses from more than 10,000 learning providers in the UK.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Data table</strong></td>
<td>The central table that holds your provider, venue and course information.</td>
</tr>
<tr>
<td><strong>Groups</strong></td>
<td>Courses can be organised into groups or folders. Groups are specific to a provider and should reflect the organisation. Groups are an optional feature.</td>
</tr>
<tr>
<td><strong>Provider status</strong></td>
<td>Provider status is displayed in the right hand side of the navigation bar. It shows the status of the provider in the overall updating process. It reflects when changes have been made and when they have been sent to National Learning Directory for validating and when those changes have been made live.</td>
</tr>
<tr>
<td><strong>Record Status</strong></td>
<td>Record status describes the status of the course, venue or provider record. E.g. changed, new, archived. Record status is displayed as an icon in the left hand side of the data table.</td>
</tr>
<tr>
<td><strong>Course finder</strong></td>
<td>The pod of the left-hand side that allows the user to search for courses.</td>
</tr>
<tr>
<td><strong>Archiving</strong></td>
<td>Courses that providers do not wish to display on the National Learning Directory can be archived. They can be un-archived by making a change to any field within the record.</td>
</tr>
</tbody>
</table>