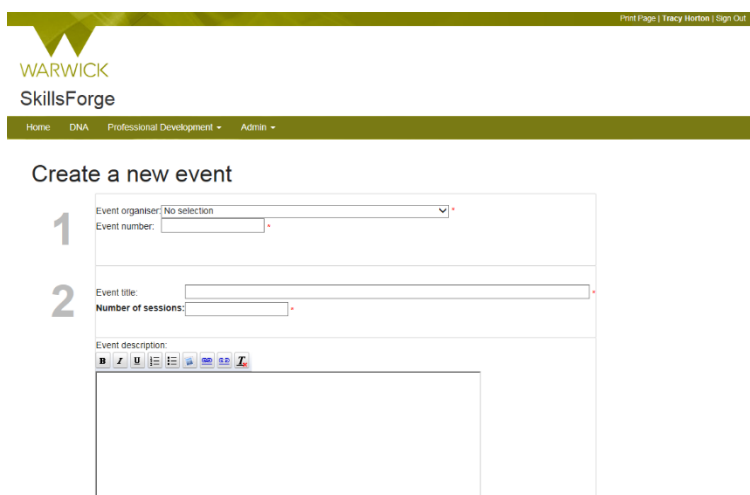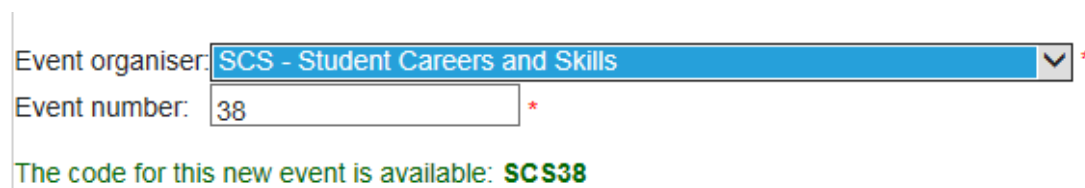# Warwick SkillsForge

Create an Event

➢ **Sign in to Warwick SkillsForge**

➢ From Useful Shortcuts or the Admin drop down tab, [Select] *Create a new Event*:

➢ In the Event Organiser Drop Down box (section 1), [Select] your *Department* (e.g. SCS – Student Careers and Skills

This will auto-populate the Event Number field with the next available number:

You can amend the code end code for the event, by [Clicking] into the *Event Number* box and typing in the number you require

You may wish to type a – in the first instance e.g. -123 as the departmental code will auto appear (e.g. entering -123 will give a code of SCS-123

To note: If you enter a code that is already in use, the following will appear:

You will need to [Delete] and [Enter] another code. Codes showing as green can be used:

> - In the *Event title* box (section 2), [Enter] the event title
> - In the *Number of sessions* box, (section 2}, {Enter] the number of sessions

To note: if you have an event that has multiple sessions that **must be completed** as part of that event the number of events must be entered here e.g. this event has four sessions and all must be taken, enter 4. / If you have an event with only one session that is then repeated, still only enter 1

> - In the *Event description box* (section 3), [Enter} any text that you would like loading for your event details page

To note: You can type directly into the box for free text or alternatively if you [Click] the link at the bottom of the box *Edit Source/Paste From PDF* you will be able to take formatting from other documents and copy and paste into this box

If you choose to *Edit Source/Paste From PDF,* the formatting buttons under 'Event description will be removed. You can remove *Edit Source/Paste From PDF* by [Clicking] onto the link that replaces it *Edit Rich Text*

In ANY Description box that appears you can:

- Make text Bold – highlight appropriate text and press

- Make text Italic – highlight appropriate text and press

- Underline text – highlight appropriate text and press

- Add numerical referencing – highlight appropriate text and press

- Add bullet points - highlight appropriate text and press

- Insert an image – [Click] on the icon. The prompt box below will appear requesting a http URL address – *images must be saved via URL to be able to insert.* [Type in the URL and [Click] on OK. The image will appear in the Event description box
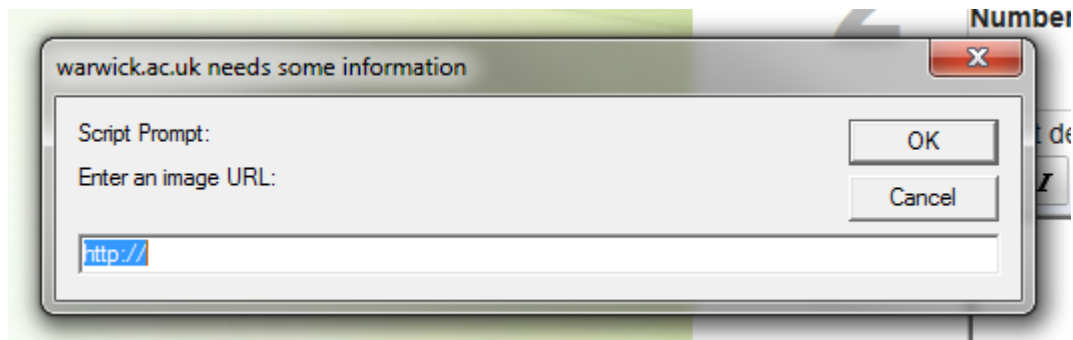
To note: Ensure images are sized accordingly; larger images are not recommended within this feature

- Insert a web link - highlight appropriate text and press . The prompt box below will appear requesting a http URL address. [Type] in the URL and [Click] on OK. The link will be added to the relevant text in the Event description box
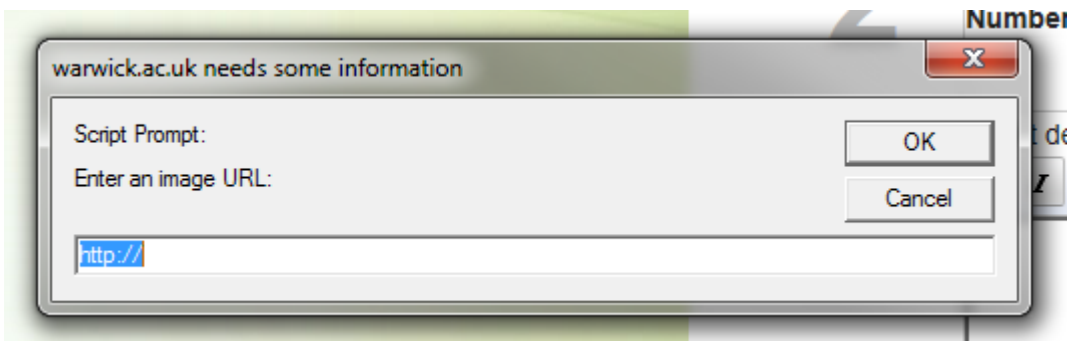
- Remove a web link - highlight appropriate text and press

- Remove formatting - highlight appropriate text and press

➢ In the Event Categories box, [Select] the relevant Event Categories. **You must choose at least one Framework Area and one Theme. Adding Skills is advised. The more relevant items selected the more searchable your event will be.**
To [Select] multiple items i.e. more than one Framework Area, Skill, or Theme, you can [Hold] down the CTRL key on your keyboard whilst scrolling up and down for the relevant category and, then [Click] to choose, [Release] the CTRL key. *(The chosen categories will be highlighted in blue).*
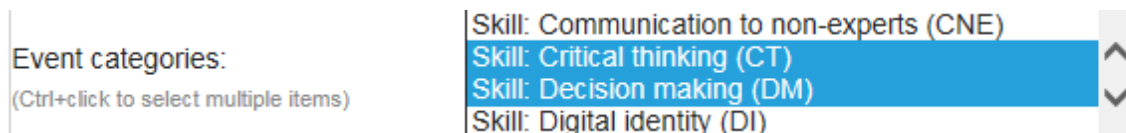
➢ The Maximum waiting list size box will automatically be populated with 1000. **To change this number**, [Click] into the *Maximum Waiting List Size* box, [Delete] the number given and then, [Enter] the correct number

➢ The Waiting list offer time limit (hours) box will automatically be populated with 48. **To change this number**, [Click] into the *Waiting list offer time limit* box, [Delete] the number given and then, [Enter] the correct number

➢ The Required cancellation notice (hours) box will automatically be populated with 48. **To change this number**, [Click] into the *Required cancellation notice* box, [Delete] the number given and then, [Enter] the correct number:

*To note: the required cancellation notice, if a number is entered e.g. 48 hours, means a researcher **cannot** cancel a place until 48 hours after booking. If you want them to be able to cancel from the time they book, you need to enter 0 here*

➢ The Allow Mix & Match bookings will automatically be selected

☑Allow 'Mix & Match' bookings

To note: If you have an event for which you need the same attendees for all those sessions, then you need to [Uncheck] this box.

Allowing mix & match bookings means that a person can choose different dates for different sessions.

➢ To hide the detailed venue information before booking, [Click] into the relevant box. A tick will appear
➢ To hide facilitator details prior to booking, [Click] into the relevant box. A tick will appear

➢ In the section 4, [Click] *Next*

If you receive an error message, check the boxes noted as:

* These fields must be filled in

➢ The Event Details page will appear:

You will see for one Framework area the respresent bar single colour and non-editable:

Credit split across frameworks: ▬▬▬▬▬▬▬▬   RF-100%

Where two Framework areas are chosen you will see a 50/50 split of the Framework areas:

Credit split across frameworks: ▬▬▬●▬▬▬▬   RF-50% / TS-50%

You can amend the % split of the Framework areas which gives a more representative split of the area:

➢ [Click] onto the **blue** 🔵 **button** and slide it across the bar to the required split:

Credit split across frameworks: ▬▬●▬▬▬▬▬   RF-30% / TS-70%

NB. The % split is in increments of 5%'s

Once % split is accurate,
➢ [Click] off the button and the system will automatically Save.

Where three Framework areas are chosen you will see a 33/34/33 (rounded up) split of the Framework areas:

Credit split across frameworks: ▬●▬●▬▬   CN-33% / RF-34% / TS-33%

You can amend the % split of the Framework areas which gives a more representative split of the area:

➢ [Click] onto **one or two of the blue** 🔵 **buttons** and slide it across the bar to the required split:

Credit split across frameworks: ▬▬▬●●▬   CN-70% / RF-15% / TS-15%

NB. The % split is in increments of 5%'s

Once % split is accurate,
➢]Click] off the button and the system will automatically Save.

Once attendance is recorded, the Framework area split/s will be reflected in the Whirligig accordingly.
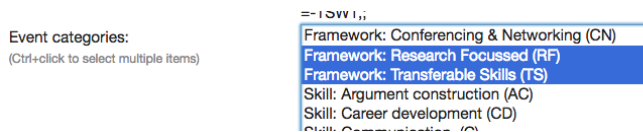
Should you wish to amend Framework areas on the Event Details Page:

➢ [Click] into the *Event Categories box:*

Event categories: • Framework: Research Focussed (RF)
(Ctrl+click to select multiple items)

- ➢ [Hold] down the *Ctrl key*, and
- ➢ [Click] onto the *Area/s* you wish to add:

- ➢ [Click] off the box.

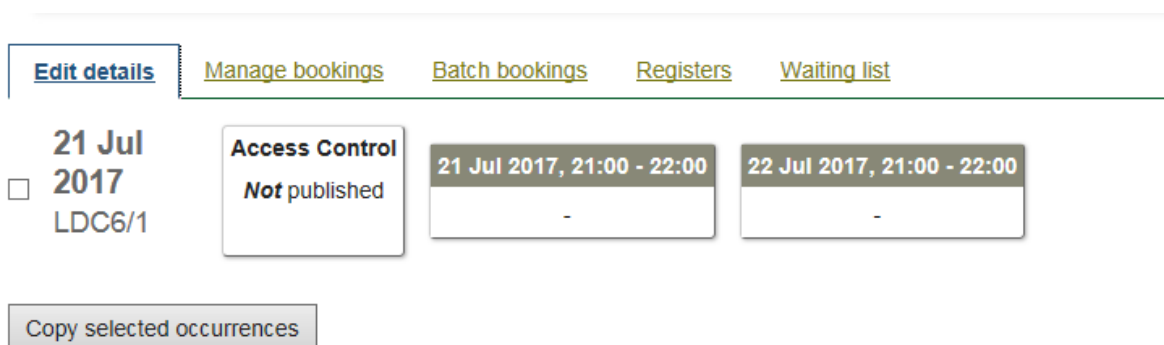The system will automatically change the Framework area bar:

NB. You can change the number of Framework areas by Clicking nto the Event Categories box and selecting/deselecting the areas **HOWEVER you need at least ONE Framework area for this to build (once attendance is recorded) into the PG Researchers SkillsForge record.**

On the Event Details page you will also see a summary of your event with details entered as well as tabs to action

To note: The Deep link is the link you can copy and use when you want to insert a link to this specific event into a web page / document etc

To note: you can change elements in this screen by [Clicking] in the relevant box (Event description / Event categories / Maximum waiting list size / Waiting list offer time limit / required cancellation notice and Other options boxes. *The **only** previously entered item you can't change is the - Allow 'Mix and Match' bookings*

- ➢ [Click] on the *Edit Details* Link
  The Access Control panel will appear:

- ➢ [Click] on the ***Access Control Not** published* box. The following will appear:

In the Publishing field, the Not published button will be automatically selected

To publish your event you can:

➢ If you wish to make your event live now: [Click] on the *Published* button, in the Publishing Field (the Published set will turn from red text to green in the Access Control checklist);

➢ If you wish to make your event live from a certain date: [Click} on the *Published from* button and in the following box, choose a date from the drop down calendar:

The date will populate that box and the *Published set* will turn from red text to green;

Alternatively you can click on *Not Published* and the event will not be made live, and the *Published set* will remain red

➢ In the Visibility permissions, [Click] on the *no value* text. A box will appear that you can select visibility permissions from:

➢ [Click] on the visibility permission/s you require

To note: It is policy that were possible you should allow your courses/events to be public facing. Where this is the case **you should choose BOTH 'non-authorised' and 'authorised' users** in visibility permissions.

Where courses/events need to be restricted - It is advised where possible you allow supervisors to *view your courses* but do not include them in *booking permissions*. This means they can see the summary of events potentially to guide researchers but are then not able to book onto.

*To [Select] multiple items, you can [Hold] down the *CTRL key* on your keyboard whilst scrolling up and down for the relevant permission and, then [Click] to choose, [Release] The *CTRL Key*. (The chosen permissions will be highlighted in blue)

➢ In the Booking permissions, [Click] on the *no value* text. A box will appear that you can select visibility permissions from

> ➢ [Click] on the booking permission/s you require*

The items will be saved and the Access Control Checklist amended:

✔ Visibility permissions set

✔ Booking permissions set

In the Open bookings field, the open bookings will have todays date noted:

Open bookings:

Open bookings on [20/7/17]   open now
Close bookings on [   ]   close now

Bookings closed description:
no value.

To open your event you can:

> ➢ If you wish to open bookings now: [Click] on the *open now* link, (the Open bookings set will turn from red text to green in the Access Control checklist)
> ➢ If you wish to open bookings from a certain date: [Click} into the *open bookings on* box and choose a date from the drop down calendar. The new date will populate that box

Alternatively if you do not wish to open your event you can remove the text from the box by [Clicking] into the box and deleting. (the Open bookings set will return in the Access Control checklist)

To close your event:

> ➢ If you wish to close bookings now: [Click] on the *close now* link. Today's date will appear in the box
> ➢ If you wish to close bookings from a certain date: [Click} into the *close bookings on* box and choose a date from the drop down calendar. The new date will populate that box

Alternatively if you do not wish to close your event you can remove the text from the box by [Clicking] into the box and deleting

To note: you can add *bookings closed description* by [Clicking] into the *no value* text which will bring up **a description box**

To note: Capacity is not completed in this section but it is worth reviewing your ***Access Control Checklist*** at the end of completing all session changes. **For researchers to be able to book you need to see the following and that the event is Published**

✔ Capacity is set on all sessions

➢ [Click] on the in the top right hand corned to close the Access Control box

Your Access Control box will be updated:

Access Control
Published
now

[Click] onto the first session box:

21 Jul 2017, 21:00 - 22:00

-

The Session 1 box will appear:

LDC6/1, session: 1

Session type: Workshop ▼

Dates: 21/7/17   21:00 to 22:00 21/7/17

Venue: Type to search... ▼ Room booking ⎘

Recommended capacity: *unspecified*

Capacity: 0

Unlimited capacity: ☐

Facilitators:

No facilitators selected. Type to search... ▼ | Create Facilitator

Public notes:
no value.

Admin notes:
no value.

➢ [Click] onto the Session Type drop down and choose relevant/best matching event type (*for ITS signposting to ServiceNow, please always choose the Session type: External*)

If you have an **Online Moodle course**, you can include this as a booked event on SkillsForge and if a student books onto this course they can be automatically enrolled in Moodle. It will also un-enrol them in Moodle if they cancel off the course

In the Session Details (Date) box:

LDC6/1, session: 1

In the drop down Session type:

> ➢ [Choose] *Online Moodle Course*

> ➢ [Click] in the *Admin notes box* (where *no value.* is stated):

> ➢ [Type] in: **moodle_id = then your ID code for Moodle**
> ➢ So moodleunderscoreidspace=spaceyourID

NB. Use lower case moodle_id *rather than Moodle_ID (for example)*

If unsure of your Moodle ID please check via PGRdevelopment@warwick.ac.uk *or ITS* helpdesk@warwick.ac.uk

Please be advised that SkillsForge recognises Moodle IDs with alphabet and numerical characters and 'underscore'.
Any other characters please email PGRDevelopment@warwick.ac.uk to have the characters included in SkillsForge.

➢ Amend the Dates by [Clicking] into the *Dates* boxes populated and choosing from the drop down calendar

➢

To note: you may receive an error message if event dates overlap or are out of date order – go back into the relevant boxes and amend

LDC6/1, session: 1

Session type: Workshop ▾

Your date overlaps other dates or is out of date order

Dates: 12/7/17   21:00 to 22:00   27/7/17

Venue: Type to search... ▾ Room booking ⤢

Recommended capacity: *unspecified*

Capacity: 0

Unlimited capacity: ☐

Facilitators:

No facilitators selected. Type to search... ▾ Create Facilitator

Public notes:
no value.

Admin notes:
no value.

bookings   Batch bookings   Registers   Waiting list

ss Control
ublished
now

12 Jul 2017, 21:00 - 27 Jul 2017, 22:00   22 Jul 2017, 21:00 - 22:00

-   -

➢ [Click] into the first time box to amend the start time:

Dates: 12/7/17   21:00 to 22:00   21/7/
              Click to edit

Venue: Type to search

To note: Times must be entered with 00:00 function. *The end time will automatically move by one hour from the amended start time*

➢ [Click] into the second time box to amend the finish time (if required)

Dates: 12/7/17   10:00 to 11:00   21/7/

Venue: Type to search   Room b

➢ [Click] into the Venue box and a list of rooms will show in screen. If you type in your building name (e.g. Ramphal) or room number (e.g. R0.14), the list will reduce for you to choose:

> ➤ [Click] on the room you have booked in the drop down box, and it will populate the venues field

To note: You will need to book your room separately and the Room booking ⌁ link will take you to the relevant Warwick site. If your room does not appear contact the Graduate School via email: PGRDevelopment@warwick.ac.uk

To note: If you have a locally timetabled room or a room not showing in the list, contact the Graduate School via email: PGRDevelopment@warwick.ac.uk to request the room be set up in Warwick SkillsForge.

The recommended capacity should automatically populate based on the room size

> ➤ In the Capacity box (default 0), [Click] on the 0 and [Enter] the number of spaces you have for the event *(NB. The number of places and waiting list are linked to this number)*

If you wish to place everyone on a waiting list to choose participants, leave the capacity as 0

To note: The Unlimited capacity box is unchecked. You may wish to [Check] this if you have an event with no limit of capacity e.g. an online module

> ➤ [Select] the event facilitator from the *no facilitators selected* drop down list by [Clicking] on the name you require /or/ you can type to search by [Clicking] into the box and typing and then [Click] on the name you require

If your facilitator is not listed you can Create a Facilitator:

> ➤ Click on the Create a Facilitator button

The screen will appear:

> [Enter] the full name of the facilitator in the *Name* field, then [Enter] a valid email address in the *Email* field

The *Name* and *Email* fields must be completed to create a facilitator. Phone is not required but can be entered

If you don't wish to create the facilitator, [Click] on the Cancel button. This will take you back to the Session 1 panel

> [Click] on the *Create* button. This will take you back to the Session 1 panel and the facilitator will be added:

NB. You can enter more than one facilitator

If you would to remove a facilitator, [Click] on

The facilitator will be removed from the list.

To note:

You can add *Public notes* by [Clicking] into the *no value* text which will bring up **a description box.**

These notes will be available in the public domain

You can add *Admin notes* by [Clicking] into the *no value* text which will bring up **a description box.**
These notes will be available to Admin only

NB. If you have an Online Moodle ID code in Admin – please do not add any other notes in this field

> [Click] on the in the top right hand corned to close the Session 1 box. You will return to the Event Details page
> **[Repeat] inputting of Session details for multiple sessions as appropriate:**

If you have an event which repeats you can copy your event occurrences

To copy your event occurrence:

> [Click] into the empty box to the left of the screen next to the date. The row will be highlighted:

> Click on the Copy selected occurrences box. The following *Offset dates* panel will appear:

The *Show more help* link – details how to complete this section. You can [Click] onto the link to view. [Click] *Hide more help* to hide the text

➢ In the *Date period* box, [Enter] the timeline – e.g. if you want the course to repeat in one week's time enter 1w, one month enter 1m, etc
➢ In the *Time period* box, [Enter] the time – e.g. if you want to repeat the course but 30 minutes later enter 00:30 or as is leave at 00:00
➢ [Click] on Copy 1 occurrence

You will return to the Event Details page with the new sessions available. To note: The Access control box will show **Not** published

You can amend Access and Session information and Publish the course by following the steps above

Reminder: For courses to be live and bookable the Access Control box must have all elements completed:

Access Control Checklist:

✔ Published set
✔ Visibility permissions set
✔ Booking permissions set
✔ Open bookings set

Further requirements for bookings:

✔ Capacity is set on all sessions
✔ All sessions have a start date in the future

Your event is now created
You can search for your event **{See User Guide: Searching for events}**

Contact:

Should you have any issues or queries (or feedback on this user guide) with regard to **create an event** please contact the PGR Professional Development Officer in the Graduate School via:

PGRDevelopment@warwick.ac.uk or tel: **024 761 50401 (ext. 50401)**