Creating a training course

The course is the master record for the content, aims and objectives of a training course. The course record contains overview information about the training including, course description, intended audience and objectives. In addition, details such as the training provider and searchable training categories (keywords) are recorded in the course record.

**Important:** before you create a new course you should ensure it does not already exist.

Create a training course

1. Log in via your UOM Training Administrator responsibility and select the **Catalog Administrator** function. The Catalog screen will display.

2. Expand the **Browse by Provider** section and locate/select the training provider under which you wish to create your new course.
   **Note:** you must select a training provider before you can create a new course.

3. Select **Course** from the drop-down list in the header and click the **Go** button.
   The Create Course screen will display.
4 Enter the details of the course.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course</td>
<td>Enter the name of the course you are creating.</td>
<td>This name will display in the Self Service Training screens and will be used throughout the rest of the Training module. This field is mandatory.</td>
</tr>
<tr>
<td>Course Code</td>
<td>Enter an appropriate code for the course.</td>
<td>Use the format: Budget Division/Faculty code – Cost Centre – sequential 3 digit unique identifier (e.g.: 8930-03-001).</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the course. *</td>
<td>This course information will display in the Self Service Training screens.</td>
</tr>
<tr>
<td>Intended Audience</td>
<td>Enter the audience to whom the course is directed. *</td>
<td>This audience information will display in the Self Service Training screens and will help prospective students determine whether the course is suitable.</td>
</tr>
<tr>
<td>Keywords</td>
<td>Enter any keywords for the course. *</td>
<td>This field will provide additional keywords on which a prospective student may search.</td>
</tr>
<tr>
<td>Objectives</td>
<td>Enter the objectives of the course. *</td>
<td>The objectives will display in the Self Service Training screens.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Enter the earliest date the course will be available.</td>
<td>This field defaults to today but may be changed. The date entered should be before the first date of the first class that will be run. Note: you may need to amend the course start date if you are retrospectively recording training details. This field is mandatory.</td>
</tr>
<tr>
<td>End Date</td>
<td>Leave this field blank unless the course is being discontinued.</td>
<td></td>
</tr>
<tr>
<td>Sponsor</td>
<td>The sponsor field defaults to The University of Melbourne and does not need to be changed.</td>
<td></td>
</tr>
<tr>
<td>Course Administrator</td>
<td>Click on the LOV to search for and select the name of the person who will be the main contact or administrator for the course.</td>
<td>The course administrator can be different from the offering and class administrator.</td>
</tr>
</tbody>
</table>

* Note: to display information in Self Service with formatting (e.g.: bulleted or numbered lists, paragraphs, bold, etc) for the Description, Intended Audience, Keywords and Objectives fields you will need to include HTML coding when entering your information in this field.

5 Click on the Apply and Add Details button to save the course details. The course record will display.
Entering course categories

1. Click on the Categories link in the menu to assign a descriptive category to the training course. The Categories screen for your course will display. **Note:** the Training Provider under which you created your course will display as the Primary Category (indicated by ☑️) and should remain the primary category for your course.

2. Click on the Add button.
   The Add Category screen will display.

3. Enter the category you wish to add and click the Apply button.
   - Click on the search icon and use the Search and Select screen to choose a category.
   - Alternatively, if you know the category you wish to add, you may type the full or partial category name and press tab.
   The Add Category screen will close and the new category will display in the Category table.

If you wish to enter multiple categories, repeat steps 2 and 3 for each additional category.

If you need to update the primary category

4. Click on the Set Primary Category button.
   The Set Primary Category screen will display.

5. Enter the category you wish to mark as Primary and click the Apply button.
   - Type the full or partial category name and press tab or click on the search icon and use the Search and Select screen (you will only be able to select from the categories you have already added to the course).

**Important:** the Provider should always be listed as the Primary Category.

The Set Primary Category screen will close and the new primary category will display with a ☑️ in the Category table.
Adding attachments to a course

If you wish to add an attachment to the course record (e.g.: course outline, supporting training materials, etc) you must save the record first.

1. Click on the **Update** button.

   ![](image1.png)

   The Update Course screen will display.

2. Scroll to the **Attachments** section at the bottom of the course record.

3. Click on the **Add** button.

   ![](image2.png)

   The Add Attachment screen will display. **Note:** the functionality available in the Add Attachment screen is common across all Themis Self Service functions/modules.

4. Complete the attachment details.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Field will default to Desktop File/Text/URL, do not change.</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>Enter a title for the attachment, if appropriate.</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Enter a brief description of the attachment.</td>
<td>This field is mandatory.</td>
</tr>
<tr>
<td>Category</td>
<td>Select the category of the attachment from the drop-down list.</td>
<td>Categories available are: Comments, Learner Attachments and Miscellaneous.</td>
</tr>
</tbody>
</table>
   | Type      | Click on the radio button to select the appropriate attachment type.    | **If selecting File:** click on the **Browse** button to locate and select the document you wish to attach.  
**If selecting URL:** type the full internet address you wish to reference.  
**If selecting Text:** enter a simple text message in the field provided. If desired you may enter a name for the text attachment in the field below. |

   ![](image3.png)

   Click on the **Add Another** button and repeat **step 4** for each new attachment you wish to add.

5. Once you have added all your attachments click on the **Apply** button.

   You will receive a confirmation that the attachment has been added but not saved.

6. Click on the **Apply** button to save the changes you have made to the course record.

   You will receive a confirmation that your attachment has been added and a **View Attachments** link will display in the Attachment section of the course record.
Additional course functionality

Learner Access
The Learner Access link allows you to restrict the entire course (and associated offerings and classes) to a particular group of staff (e.g.: an individual department, a particular role, or staff reporting to a particular manager, etc).

Important: while you may restrict participants at a Course level, we recommend this action be undertaken at the Class level as it allows greater flexibility. Please refer to the Creating a class and class sessions reference card for details.

Learner Competencies
This function is not currently being used by the University.

Other Information
This function is not currently being used by the University.

Prerequisites
This function is not currently being used by the University.

Evaluation
This function is not currently being used by the University.

Example of course within Staff Self Service

Navigate to: Performance and Development > Training and Development