

TRAINING & EVENTS MODULES IN HELIX



Introduction

The **Training Module** is where you can create modular training courses for Clients registered on Helix, which may lead to an outcome and/or qualification.

The **Events Module** is where you create events and record attendees who are: Clients registered on Helix, Helix Enterprises, Enterprise Contacts or members of the public not registered on Helix.

Training Courses are a bit more complicated to set up but offer more functionality, Events are more flexible and easier to set up.

Deciding Which to Use

When deciding which to use, the main things to consider are:-

- **Who are the attendees?**
- **Does the course run over several modules/sessions or is it a one-off?**
- **Will the course lead to a Qualification or Outcome?**

If all the attendees are Helix-registered clients, the course is modular or has sessions, or you wish Activities/Outcomes, Qualifications or Skills to be automatically added to your Clients' records upon completion, then go for a **Training Course**.

If it's a one-day event like a Job Fair, attendees are a mix of clients, business contacts and members of the public, it's not modular and doesn't lead to a qualification – use an **Event**.

Activity Alternative

If you don't want to add either an Event or a Training Course, you can add an activity of **Groupwork** to your client's records. This works fine but is not as good for reporting.

Training Courses



Some Training Course Examples

- **A year-long course**, with one module per Quarter and one or more sessions every week.
- **A six month course**, with one module per month and session(s) every week
- **A four-part course** with one Module per Topic and sessions for each.

Training Course Fundamentals

Training Courses have **3 Levels**, for example:-

- **Course**
Course Details
- **Modules**
 - Module 1
 - Module 2
 - Module 3
- **Sessions**
 - Module 1 – Session 1
 - Module 1 – Session 2
 - Module 2 – Session 1
 - Module 2 – Session 2
 - Module 3 – Session 1
 - Module 3 – Session 2

NB you need at least one **Module** for all Courses, even if the course is not modular


NB you need at least one **Session** for all Modules

Copying an Existing Training Course

Rather than creating a course from scratch, you can **copy an existing Course** (if you or your colleague has previously created a course) by:-

- Finding the existing course in **Training/Search**
- Navigating to the Training Course level

Dashboard / Training / **Training Course** / Modules

- Selecting **Course Detail/Detail**.
- Scroll down and click on 
- You will then get the following options:-

Copy Training Course

Course Name *

* Course name is required

Start Date *

* Start date is required

End Date *

* End date is required


Copy Modules

Copy Live Enrolments

Save

Return

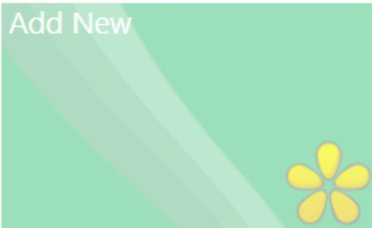
These fields will be auto-filled with the details of the course you copied, which you can then edit.

- Select 'Copy Modules' to copy to course Modules
- Select 'Copy Live Enrolments' to copy enrolments to your new course.
- Click on 

Creating a New Training Course

Dashboard / Training / Add Training Course

Add New



Steps to Creating your Course:-

Click on **Add New**, then complete the form as follows (**Mandatory fields** have an asterisk *)

- **Course Name** – self-explanatory but try and choose a meaningful name which will distinguish it from other courses on the system and make it easier to find.
- **Caseload** – usually set to yourself, unless you're setting up the course on behalf of a colleague.
- **Status** – set this to **Live**. The course must be Live for you to add Enrolments and Attendees.
NB Even if you are adding the course retrospectively it needs to be live.
- **Description** – further details. If the course name isn't enough to describe the course content, e.g 'Going Forward', you can add further details here. You can also add HTML tags, which will style the description in a web portal, once that functionality is live.
- **Notes** - good for a summary of the course.
- **Code** – this is not mandatory but you can use a code to give your course a unique id, which will help you to find it later, especially if you create a lot of courses or they are courses as part of a college prospectus.
- **Entry Requirements** – self-explanatory. More Useful if you want the course uploaded to a webpage.
- **Start Date** and **End Date** – It is important to keep these wide enough to encompass all of your Modules and Sessions, that is the system won't let you add Modules or Sessions outside these dates.
- **Location** – The location where the training will take place. Not mandatory but good practice to add one. Choose from a set list - If your location is not on the system, ask Gordon or Chris to add it.
- **Provider** – The Organisation providing the training. Choose from a set list – if your provider is not on the system, ask Gordon or Chris to add it.

- **Min Places** and **Max Places** – you can leave these blank, but if you fill them in remember to make them broad enough for all of your Modules and Sessions. i.e. if there will be different people attending each session, the Max should be set to the total number allowed for ALL sessions.
- **Site** – This is the Site on Helix, not your physical site, and will default to your Helix Home Site. Change if setting up for a different Site in your organisation.
- **Course Type** – These options affect the **completion criteria** for your course. Choose from:-
 - **'Roll On Roll Off'** – with this option you can set completion criteria, i.e. the number of modules required to complete the course and the number of sessions required to complete a module. Setup of modules and sessions is manual.
 - **'Higher Education/Further/Education'** - with this option Clients have to complete all Modules and all Sessions to complete the course. Setup of modules and sessions is manual.
 - **'One Day Course'** – this option will auto-generate one module and one session (you'll be asked for Start and End Time of the session), both with the same date as the Training Course.

If you require additional course types, please speak to Gordon or Chris.

- **Completion Requirements** – The number of Modules required to complete the course. This is important, especially if you want to automatically add an Activities/Outcome to Client records once they've completed the course.
- **Provider Service** – ignore this.

Click on  and

You'll see a summary of the course – check everything is correct.

Creating the Modules

Next we'll create the module(s). All Training Courses need **at least one module**, even if your course is not modular.

Select on **Modules/Modules**

You'll notice you're now down a level at:-

[Dashboard](#) / [Training](#) / [Training Course](#) / [Modules](#)

Modules have to be added one at a time:-

Click on  and then fill in the **'Add Training Module'** form, as follows:-

- **Module Name** – give the module a meaningful name
- **Code** – module code, not mandatory.
- **Description** – a description of the module content
- **Owner (Caseload)** – set to the same as the Caseload for the Course
- **Status** – set this to **Live**
- **Notes** – add any module notes
- **Start Date** and **End Date** – make sure these fall within the course dates.
- **Location** – set this to the same as the Course location
- **Provider** – set this to the same as the Course provider
- **Min and Max places** - you can leave these blank or set a min and max number of attendees for the Module to run – **NB** make sure max is high enough to encompass attendees at all Sessions.
- **Site** – Your Home Site on Helix
- **Number of Sessions Required to Attend** – The number of Sessions an attendee needs to attend to complete the Module. Each completed Module will contribute towards a completed Course.

Click on 

Repeat the process above if your course will have more than one Module.

Modules are now set up, now we need to set up **Sessions** for each Module.

Creating the Sessions

Sessions don't have names, just Dates.

Click on one of the Module names to take you to:-

[Dashboard](#) / [Training](#) / [Training Course](#) / [Modules](#) / [Training Module](#)

Then select **Sessions/Sessions** to take you here:-

[Dashboard](#) / [Training](#) / [Training Course](#) / [Modules](#) / [Training Module](#) / [Sessions](#)

When creating Sessions, you have a choice of how to proceed:-

1. **Create Sessions one at a time** – a good choice if the sessions all run at different times, or on non-consecutive or irregular days.
2. **Create Multiple Sessions** – a good choice if your modules (or a group of your modules) run at the same time on regular days.

To Create Sessions One at a Time

Click on [Add New Session](#) then complete the form as follows:-

- **Date** – date of the session, make sure this falls between the Module Start and End dates.
- **Start Time** and **End Time** – start and end times of the session
- **Notes** – any notes you want to add
- **Location** – set to the same as the Module and Course, it will be auto-filled with the Module Location for you.
- **Status** – set this to **Active**

Click on [Save](#) and repeat the process above for any other Sessions in this Module.

To Create Multiple Sessions

Click on [Add Multiple New Sessions](#) then complete the form as follows:-

- **Date From** and **Date To** – Dates of the first and last Sessions you want to create. Make sure these fall within the Module dates.
- Sunday Monday Tuesday Wednesday Thursday Friday Saturday
Select which day(s) of the week the sessions will take place
- **Start Time** and **End Time** – start and end times for your sessions. **NB** this must be the same for all the sessions you're creating. You can create more at a different time afterwards, if required.
- **Notes** – any notes you wish to add
- **Location** – the Location where the Session will take place. The Module Location will be filled in by default.
- **Status** – set this to **Active**

Click on [Save](#) and your Sessions will be created.

Once you're happy with the Sessions for this Module, add sessions for any remaining Modules by clicking on:-

[Dashboard](#) / [Training](#) / [Training Course](#) / [Modules](#)

then clicking on the next Module name and repeating the process above.

Adding Documents

You can add documents to the Course, such as an Agenda or Directions in one of two places:-

1. For a **particular Module** - navigate to a **Module** and select **Actions/Documents**
2. For the **Course as a Whole** – navigate to the Training Course level and select **Actions/Documents**

For each of the above, click on the **Upload** button in the relevant area then:-

- Click on **Choose file** then select a file to Upload and Click on Open.
- **Document Type** – you can ignore this.
- **Document Status** – ignore this too.
- **Document Confidentiality Rating** – Set to General to allow anyone to access, Lock to remove access, select the name of your Helix Home Site to restrict access to your organisation.
- **Web User Access** – tick to allow access from a web portal (not yet live)
- **Public Access** – ignore this
- **Is Course Material** – tick if the document is part of your course material.

Click on **Upload** then repeat for any other documents you wish to add.

Your course is now fully set up, it only remains for us to set up the **automatic adding of Activities/Outcomes/Qualifications and Skills to course attendees** when they Enrol on the Course or Complete the Course.

TIP: Get this sorted before you start signing people up to the course. If you don't then those already signed won't have the autogenerated activity and you will have to add them retrospectively one at a time.

Adding Activities on Course Enrolment or Withdrawal

You can auto-generate an **Activity when a client Enrols** on a Course or **Withdraws** from a course by:-

Navigating to the Training Course level

Dashboard / Training **Training Course** / Modules

and select **Course Detail/Detail**.

Scroll down to **Activities** then

- Under **Enrolled Activity**, select an activity (such as 'Started Training Course') and click on **Save**.
- Under **Withdrawn Activity**, select an activity and click on **Save**. **NB** this is not often used.

Adding Activities/Qualifications/Skills on Course Completion

You can also auto-generate Activities, Qualifications and Skills when a client Completes a course by:-

Navigating to the Training Course level

Dashboard / Training **Training Course** / Modules

and clicking on **Course Detail/Completion**.

Here we can add

- **Activities:** In the Activities tab, tick the **Activity** or **Activities** you wish to add and click on **Save**.
- **Qualifications:** In the Qualifications tab, tick the **Qualification(s)** you wish to add and click on **Save**.
- **Skills:** In the Skills tab, tick the **Skill(s)** you wish to add and click on **Save**. This can help with job-matching.

The items you've added above which will be added to client records when they **Complete** the course.

NB When Clients attain the Completion Criteria (by Attending the correct number of **Sessions** in the correct number of **Modules**), they will appear in your **Alerts** under the **Training Tab** (see **Course Completion** below for full details).

NB Completion Activities, Qualifications and Skills will only be added to Client Records once you've actioned these Alerts.

The only thing remaining to do is **Enrol clients** on the Course and set their **Attendance** (for sessions that have already happened).

Enrolment

You can Enrol Clients:-

- On the **whole Course**
- On particular **Modules**

If your attendees will be the same for the whole course, Enrol them at Training Course level, otherwise enrol them on a specific Module.

Enrolment at Training Course Level

NB There are **two methods**, we prefer the first but use whichever you prefer.

Method 1

Navigate to the Training Course then select **Actions/Enrolments**

You then have the following options/tabs:-

Training Course Enrolments

Waiting List		Accepted Clients		Enrolled Clients		Completed Clients	
Show	10	entries	Search:		<input type="text"/>		
Ref	Name	Notes	Created Date	Rejected Date	Status		

- **Waiting List** – if you want to have a waiting list of interested clients, use this tab. **NB** not often used.
- **Accepted Clients** – for clients who've been accepted from the Waiting List, use this tab. **NB** again not often used.
- **Enrolled Clients** – for clients you wish to Enrol on the Course. This is the most commonly used –
 - Click on **Add**
 - In 'Selected Clients' type in the name(s) of the clients you wish to enrol, one by one and select them from the pop-up matches. Once you've added all clients:
 - Set **Status** to **Enrolled**
 - Set **Date** to the Enrolment Date – **NB** this must fall within the course dates and be on or before the date of any sessions you wish to enrol them on.
 - **Notes** – add any notes you wish
 - **Enrol to Modules** – select any Modules you wish to Enrol the clients on.
 - **Module Enrolment Status** – set this to **Enrolled** then click on **Save**
- **Completed Clients** – A list of clients who have completed the right number of sessions and modules to complete the course.


The clients you added will appear in the relevant tab.

Method 2

Go to Training/Enrolment



- **Select the Course** (and relevant Modules) from the list,
- In the 'Enter persons name...' field: **add Clients** one by one by typing in their name

- Set **Course Enrolment Status** to **Enrolled** (or one of the other options)
- Set the **Enrolment Date**
- Add any Notes you wish
- Click 

NB We prefer the first method because with the second method there is no list of Clients already Enrolled, so it is possible to add duplicate enrolments, which is not easy to undo.

Enrolment at Module Level

If you wish to enrol different sets of Clients on different Modules, use this method.



NB If you've already enrolled clients at Course level, you won't need this step unless additional/different clients are enrolling on a specific Module.

NB Enrolling clients at Module level will also enrol them on **Sessions in that Module**.

- Navigate to a specific Module

[Dashboard](#) / [Training](#) / [Training Course](#) / [Modules](#) / Training Module

- Select **Actions/Enrolments**

- Click on 
- **Select Clients** one by one by typing in their names
- Set **Module Enrolment Status** to **Enrolled**
- Set **Enrolment Date**
- Add any **Notes** you wish
- Set **Course Enrolment Status** to **Enrolled**
- Click 

Attendance

Attendance is set at **Session** level.

NB Clients must attend the stated number of Sessions to complete a Module and must complete the stated number of Modules to **Complete the Course**.

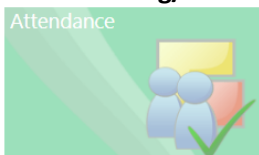
There are **two methods** of recording Attendance:-

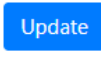
Method 1

- Click on the Session then select **Attendance/Attendance**
- Tick the clients who attended and then select **Attended** and **Update**.

Method 2

- Go to **Training/Attendance**



- Select:- **Course, Module** and **Session** from the pop-up menus.
- Under 'Update all checked to', selected **Attended** (or one of the other options, if relevant)
- Tick the checkbox(es) next to the relevant clients in the list, then click on 
- You can repeat the process above for further sessions.

Viewing Attendance in the Client Record

You can view a client's Training Course attendance history by:-

- Navigating to the client record
- Selecting **Action/Training**
- You'll then see a **Training Summary**, like this:-

Client Training Summary


Summary of client's training

Client: **Augie Doggie (Dog90447)**

Summary

Enrolment				Attendance				
↑	Course	Status	Created Date	Rejected Date	Accepted Date	Enroled Date	Withdrawn Date	Notes
+	The Beat Goes On (Made Up)	Enrolled	22/01/2024			01/01/2024		📄
+	Acme Minigolf (Made Up)	Completed	24/01/2024			23/01/2024		📄

[Add New](#)

Clicking on one of the  buttons will load Module Enrolment details for the course.
NB This sometimes takes quite a while to load.

You can also **enrol a client on another Training Course** from here using the  button.

- Select the **Course** and **Module(s)**
- Set **Course Enrolment Status** to **Enrolled**.
- Set **Module Enrolment Status** to **Enrolled**.
- Set the **Enrolment Date**
- Add any **Notes**
- Click on **Save**.

The **Attendance tab** above, looks like this:-


Enrolment				Attendance											
<input type="text" value="Filter Attendance"/>															
Show <input type="text" value="10"/> entries				Search: <input type="text"/>											
Course	↑	Module	↑	Date	↑	Start Time	↓	End Time	↓	Location	↑	Attendance	↑	Notes	Edit
Acme Minigolf (Made Up)		Minigolf Module 1		24/01/2024		10:00		14:00		Out of the Blue Drill Hall		Attended		📄	Edit

NB This tab can take quite a while to load data

Course Completion

NB Course completion does not happen automatically.

When your clients have met the **completion criteria** set up for the course, that is they've attended the minimum number of Sessions to complete Module(s) and the minimum number of Modules to complete the course, they will

appear in your **Alerts**  under the **Training tab**, like this:-

Clients who have met roll on/roll off training course completion requirements

Show entries

Search:

Client	Course	Status	Start Date	End Date	
Augie Doggie	The Beat Goes On (Made Up)	Enrolled	31/03/2024	31/03/2024	<input type="checkbox"/>
Daffy Duck	The Beat Goes On (Made Up)	Enrolled	31/03/2024	31/03/2024	<input type="checkbox"/>
Doggie Daddy	The Beat Goes On (Made Up)	Enrolled	31/03/2024	31/03/2024	<input type="checkbox"/>

- **Tick the checkboxes** for the Clients you wish to Complete
- **Click on** [Manage Selected Training Course Enrolments](#)

You will then see this form:-

Edit Training Course Enrolments

Clients Selected

- (Dog90447) - Augie Doggie

Status *

--- Select ---

Notes

Save

Delete

Return

- Set **Status** to **Completed** (or one of the other options if relevant)

You'll then see these additional fields:-

Notes

Completed Date

Module Enrolment Status

--- Select ---

Add Completions?

Save

Delete

Return

- **Add Notes** if you wish
- Enter the **Completed Date**
- Set **Module Enrolment Status** to **Completed**
- Make sure you tick **Add Completions?**. This will ensure completion **Activities, Qualifications** and **Skills** are added to the Client Record(s).
- Click on **Save**

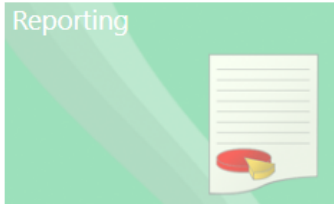
Other Training Course Menu Items

Actions

- **Activities** – This is used to manually add an activity to Enrolled clients, related to the Course. **NB** There is an Activity Menu item in Modules and Sessions too where you can add an Activity to enrolled clients which will be linked to the specific Module and/or Session.
- **Share** – share your course with other Sites in your organisation (ie another LA) or other organisations.

Other Areas of the Training Module

- **Training/ Search** – Simple and Advanced Training Course search facilities.
- **Training/Reporting**



Find Training Courses matching criteria and Save Criteria. From here you can also **produce reports**:-

- **Training Attendance Report** – Web report showing breakdown of Attendance for matching course(s)
- **Training Analysis Report** – Web report showing Breakdown of attendance percentages
- **Training Register Template** – A printable **Register** for logging attendance
- **Training Register Template (Filled for one selected Module)** – Same as above but for a specific Module (or modules). **NB** Requires a module to be added to the criteria.
- **Client Hours Work** – A breakdown of Client time spent at Training Courses.
- **Training Attendance** – set Attendance quickly for the whole course, as seen earlier
- **Training/Training Enrolment** – set Enrolment quickly for whole course, as seen earlier. Personally I prefer the interface in the Training Course, because on this screen it doesn't show a list of those enrolled and it can create duplicate entries if you're not careful. i.e.

	Ref	Name	Attendance
<input type="checkbox"/>	Mcg90446	Quick Draw McGraw	
<input type="checkbox"/>	Mcg90446	Quick Draw McGraw	
<input type="checkbox"/>	Dad92677	Doggie Daddy	
<input type="checkbox"/>	Dad92677	Doggie Daddy	
<input type="checkbox"/>	Duc63218	Daffy Duck	
<input type="checkbox"/>	Duc63218	Daffy Duck	
<input type="checkbox"/>	Dog90447	Augie Doggie	
<input type="checkbox"/>	Dog90447	Augie Doggie	

Events

Introduction

Events are simpler to set up and are intended for things like Job or Recruitment Fairs, Community Wealth Building etc.

Events have **2 Layers**:-

- **The Event**
- **Sessions**

But you don't have to set up Sessions unless you need them, so you can set up an Event quite quickly.

With Events you can have attendees who are not clients registered on Helix, for example Enterprise Contacts or members of the public – a group of soon-to-be school leavers or attendees at a youth club for example.

A rectangular button with a light green background and the text "New Event" in white.A rectangular button with a light green background and the text "Find Event" in white.

Find Event

- **Simple Search** – the usual search function
- **Advanced Search** – you can save and load searches in here too

New Event

- Click on **Add New**. * **Fields are mandatory**.
- **Event Title** – make this something meaningful. If you're running multiple similar events, perhaps add the Month or Quarter to the name to distinguish them.
- **Event Type Group** – The Type of Event, this is not an exhaustive list, we can add another category if required.
- **Event Type** – a sub-menu of Event Type Group.
- **Event Description** – Not mandatory
- **Event Location** – This is a required field but is an OPEN TEXT BOX, so you can add anything you want here, no pre-set list.
- **Event Postcode** – not mandatory but add if you have it.
- **Event Start Date** and **End Date** – start is mandatory.
- **Event Start Time** and **End Time** – start is mandatory.
- **Provider** – required field.
- **Event Provider Contact** – let us know if the contact is not in the list and we'll add them.
- **Event Status** – set to **Live**

Add Sessions

You can add sessions if you want to, using the **Add** button, then completing the Create Session form.

Enrolment and Attendance

To **Enrol Clients/Enterprises/Enterprise Contacts** on the Event, you need to:-

Invite them to the Event

- Open **Quick Jump List** and add in the relevant **Clients** and/or **Enterprises** and **Enterprise Contacts**

- Select **Add Records** and **Invite to Event**. **NB** this won't send folk an email or message, it will just add them to the list of possible Attendees.

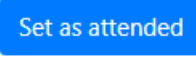
Attendance

Select **Action/Attendance** – For Clients, Enterprises and Enterprise Contacts on Helix

Select **Action/Attendance Groups** – For un-named attendees not on Helix.

Attendance

Invited Clients, Enterprises and Enterprise Groups will show here.

Select those who Attended and click on 

Attendance Groups

Click on Add then:-

- Select **Group Type**, **Group** and **Amount** (number of attendees)
- eg NHS Staff, School Pupils, Migrant Workers etc
- Click Save

Other Menu Items for Events

Action menu

- **Invitations** – Not often used but you can log acceptance of invitations here.
- **Event Portal Interest** and **Portal Publishing** – These are not live yet but will allow people to sign up to an Event via a portal.
- **Share** – allows you to share your event with other sites on Helix. Great to advertise the event wider and allow colleagues to invite their clients.

Profile menu

- **Documents** – for uploading documents to your Event, eg Agenda. There's another area for Welcome Packs.
- **Enterprises** – here you can invite other organisations who'll be providing training at the Event.
- **Portal Image / portal Interest** – no live sign up as yet, so ignore at present.
- **Staff** – here you can invite members of staff who'll be helping with the Event.
- **Welcome Packs** – Create a welcome pack and upload documents.

That's it, except that once your **Event is finished**, you should set the **Status** to **Complete** in **Detail/Details** and click on **Edit**.

Web Reports

Events

Event Export – At present this is the only **Web Report** for Events. No criteria required, just a Date Range filter. It's a summary report showing numbers of attendees in each category for all Events you have access to, within the date range.

See the [Glossary of Helix Reports](#) for an up to date list of reports.

Training Courses

At the time of writing, these are the available **Web Reports** for Training Courses:-

Report Name	Description
Client Training Report	Client Training course report - shows Name, Age, Location, Gender, Ethnicity, Referral Route, Course Attended,
Programme Outcomes Training Attendance Report	Has client attendance at training sessions by date module and training course name
Training Attendance Pivot	Pivot report showing Training Course attendance figures for clients matching the criteria
Training Course Export	List of Clients' attendance at Training Courses an Modules (no Sessions), with Referall Route. Not sure how useful it is without date filters.

See the [Glossary of Helix Reports](#) for an up to date list of reports.

There are also the reports available in **Training/Report**, described in the 'Other Training Course Menu Items' section above.

Training

