Trainers Scheduler Guide

As 7th May 2021

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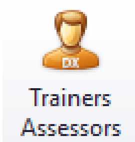
Contents

Initial Set Up

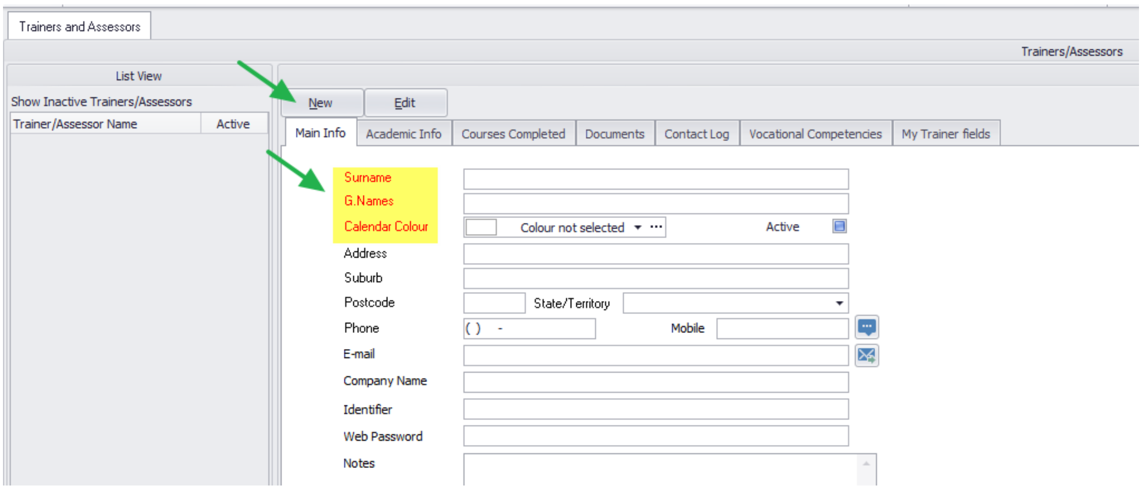
To use the Trainers Scheduler, we need to make sure we have a few things set up.

- Trainers added to the “Trainers & Assessors” area.
- Configure the “Scheduler” area.
- Course in the system
- Create training sessions for course

How to add a Trainer to PowerPro 

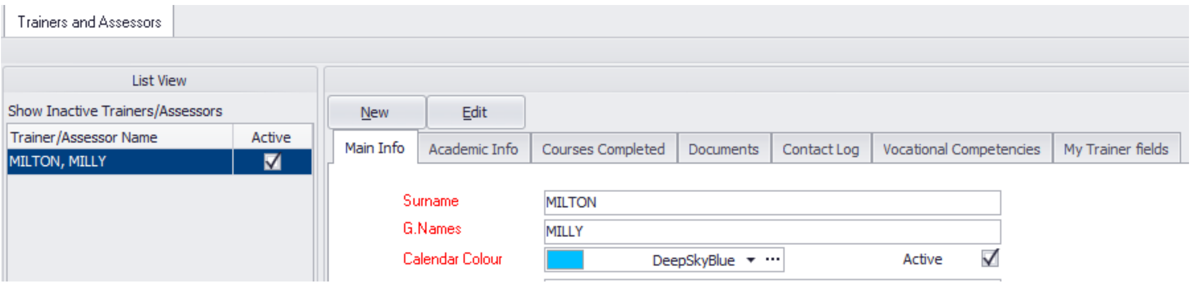
From the Home menu click on the Trainers and Assessors icon.

In the Trainers & Assessors window, click on NEW to add a trainer into the system. As in all areas of PowerPro any field in **red** is mandatory, so to be able to save information is required in this field. Best policy is to add as much information as possible. Select a colour for the trainer, this will indicate the trainer on the scheduler.



Once you have added information on the main page, please save so they appear on the “List View” on the left side of page before adding any other information to the following tabs of the trainers.

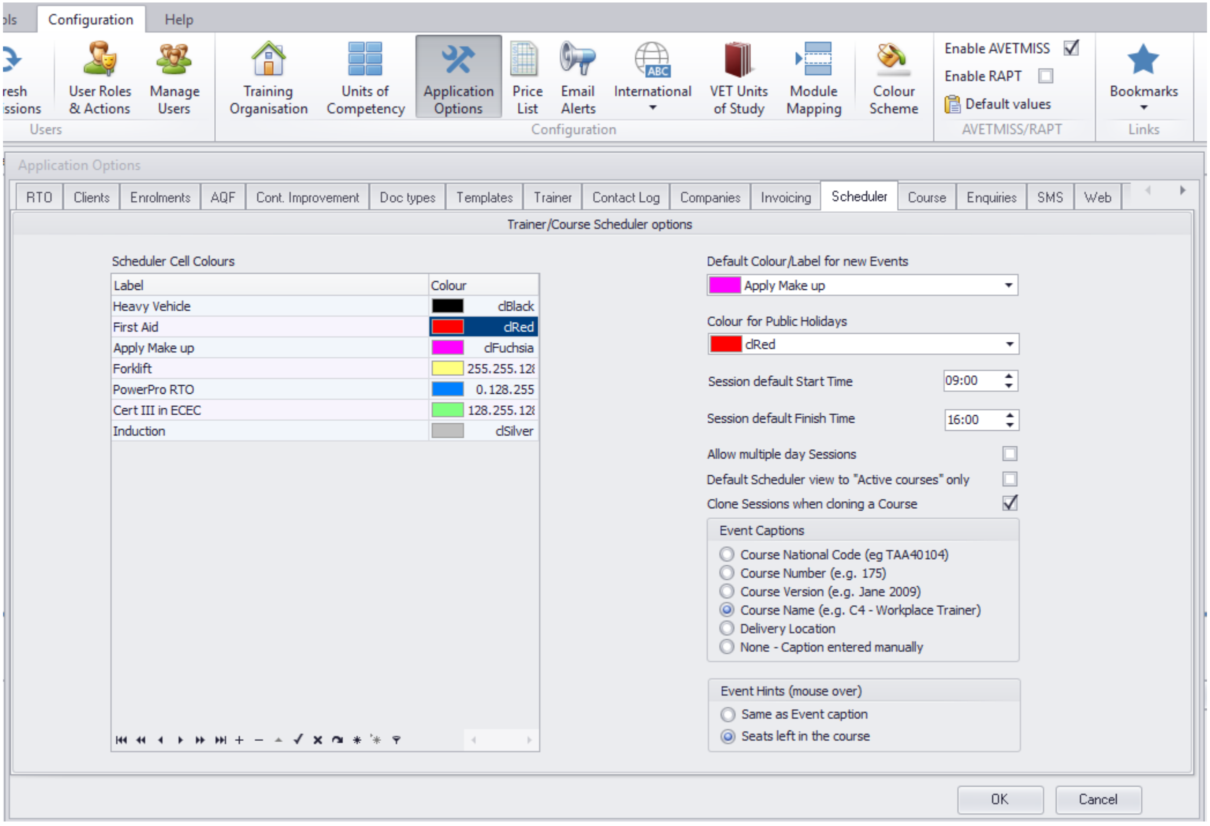
To use the Trainers Scheduler, we only need the basics as pictured.



Configuring the Scheduler

From the Configurations menu click on “Application Options” icon.

The Application option window will appear, this is where you configure all the areas of PowerPro. Please go to the “Scheduler” Tab.



First, we need to add your program names under the “Scheduler Cell Colours” on the left. If you have some there already there you can modify these by clicking on the line and rename this label, you can select a new colour or keep the existing. To add new courses, click on the + symbol at the bottom of this box a new line will appear. Enter the new course name then select colour.

On the right side of the scheduler window, set the following.

- Default Colour/Label for new Events
  Select which course you would like to make your default course (the course you deliver the most).
- Colour for Public Holidays
  Select your preference for colour marking public holidays on scheduler.
- Session Default Start and End time
  Set a set start and end time for your training sessions.
- Allow multiple day sessions – tick box to select.
- Default Scheduler view to "Active course" only – tick box to select.
- Clone sessions when cloning a Course – tick box to select.
  If the course you are cloning already has session created, it will clone these sessions and adjust them to fit within course start and end dates.
- Event Captions
  Select an option from the list as to how you see session on Scheduler.
- Event Hints (mouse over)
  Select option from list of view to see when hover over session.

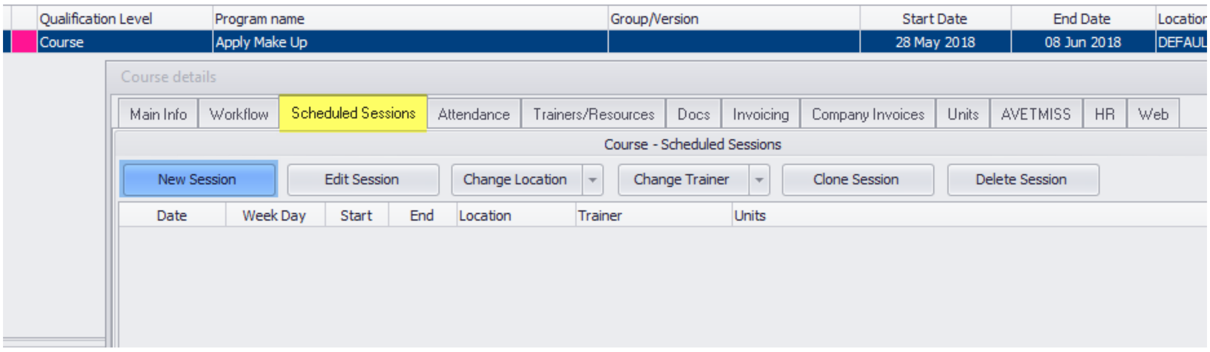
Now create your Accredited/Non-Accredited course in PowerPro and add the trainer/s.

Create Session/s for Course

Select the course that you wish to add sessions too. This can be done from the ACC/NATM or Enrolment & Results window.

To access the course set up areas, double click on the course to edit details.

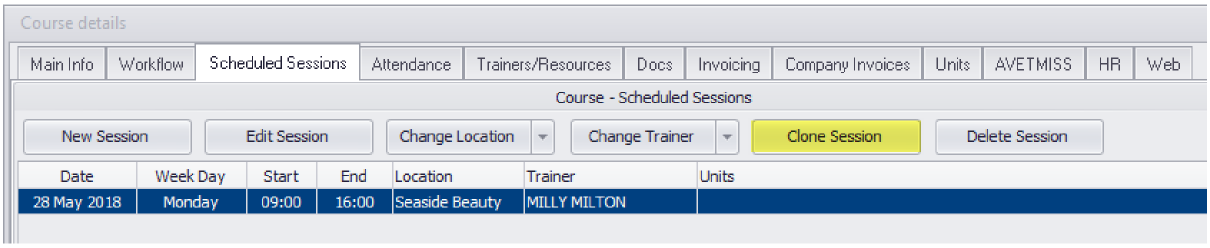
Select "Scheduled Sessions" tab.



Click on "New Session" another widow will appear, this is to create the first session. Start from the top select (1) trainer from the drop down. If they are not there, then you have not added them into the system as yet. Go back to page 4 to see how to add trainer. The course field is greyed out as you are not able to create session for another course (2) Units- possibility to select units associated with this session (max 6 units allowed) You don't need to select any units, as you may not know what units the trainer will be delivering on that session. (3) Location- this will prompt as the location set up on the course. You can select another location from the drop down or create a new location by clicking on the "New Location" button. (4) The Caption default to the Scheduler settings or you can change on the "Set Caption as" to the selection available. (5) The Colour/Course type is next and will default to again the scheduler setting or use the drop down to select another course. (6) Course Dates fields are greyed out as they are picked up from the course start and end date. Cont…

(7) Trainer Cost - is there if you would like to associate a cost for the session. (8) Session Date- is automatically pick up from the start day of the course, you can select another date that is within the start and end date of course. (9) Start and End Time fields are picked up from the scheduler defaults. But maybe changed here. (10) There are 2 tabs at the bottom “Notes” and Session Plans”. The Notes can be added on the class roll by using the merge field in the Roll Templates.

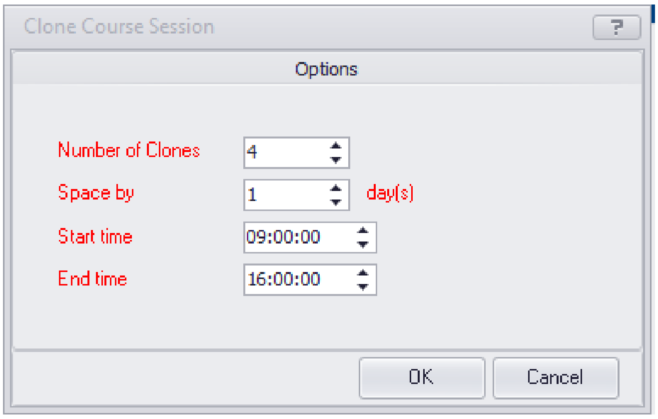
Once you are happy with the details, click ok and this session will now appear as a scheduled session.

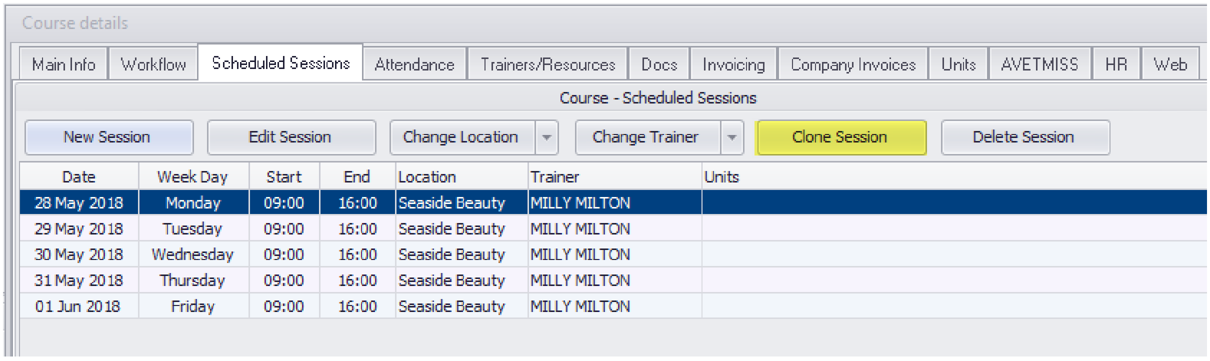


To clone this session, highlight the session then click on “clone session”.

As an example, I have a course that runs from the 28th May to 8th of June 2018, as you can see I have my first sessions.

I am going to create 4 more sessions spaced by a day to give us the week.



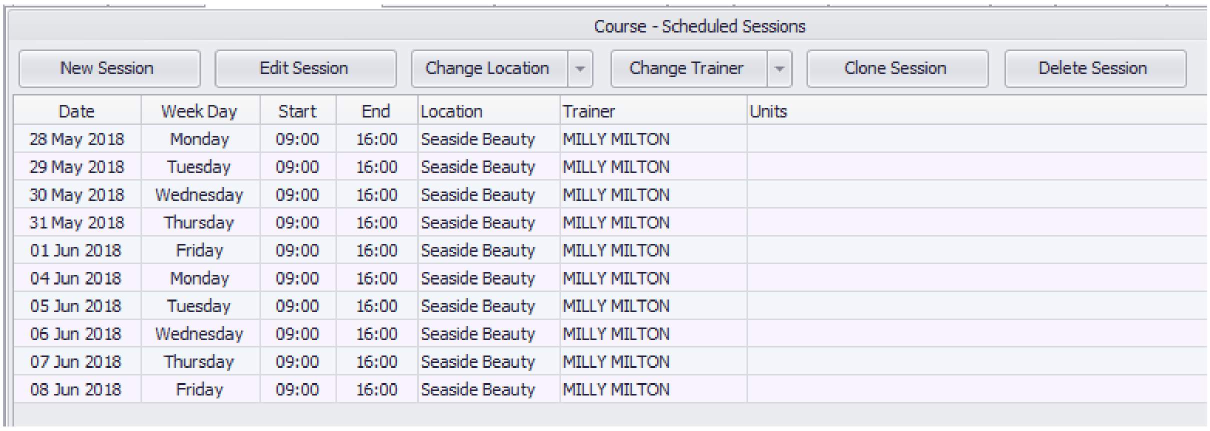


Date	Week Day	Start	End	Location	Trainer	Units
28 May 2018	Monday	09:00	16:00	Seaside Beauty	MILLY MILTON	
29 May 2018	Tuesday	09:00	16:00	Seaside Beauty	MILLY MILTON	
30 May 2018	Wednesday	09:00	16:00	Seaside Beauty	MILLY MILTON	
31 May 2018	Thursday	09:00	16:00	Seaside Beauty	MILLY MILTON	
01 Jun 2018	Friday	09:00	16:00	Seaside Beauty	MILLY MILTON	

Now I need to create another 5 sessions, so we have 10 sessions to take us up to 8th June.

Highlight the first day and click on clone, this time we want to clone just 1 session spaced by 7 days this will give us our 2nd Monday. Now repeat this by highlighting the Tuesday and click on clone, again clone by 1 and spaced by 7 days. Do this for the other 3 days.

This is how it should appear.



Date	Week Day	Start	End	Location	Trainer	Units
28 May 2018	Monday	09:00	16:00	Seaside Beauty	MILLY MILTON	
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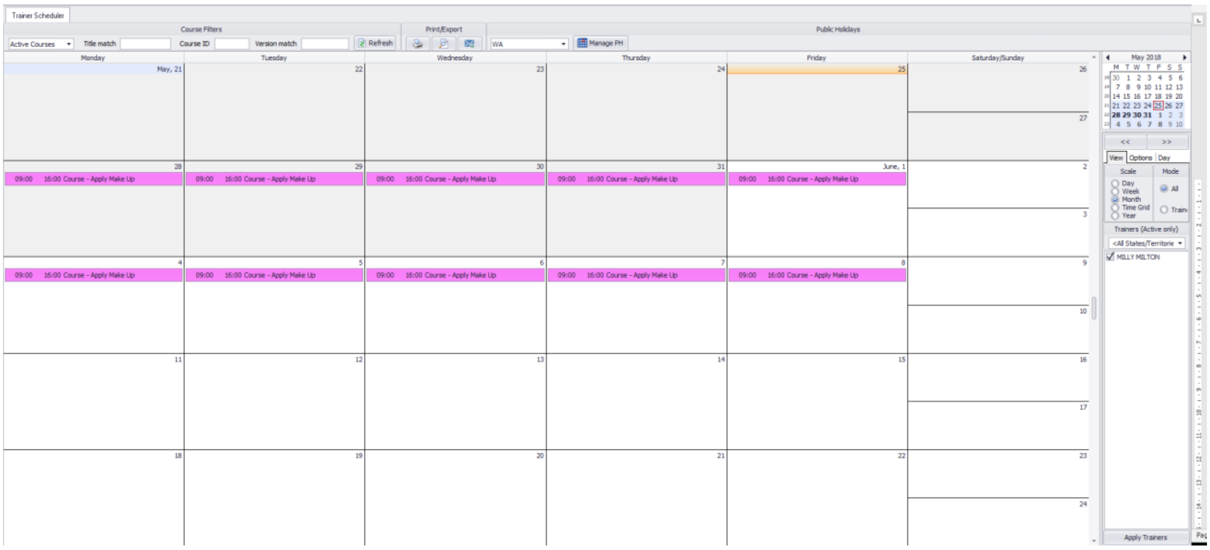
31 May 2018	Thursday	09:00	16:00	Seaside Beauty	MILLY MILTON	
01 Jun 2018	Friday	09:00	16:00	Seaside Beauty	MILLY MILTON	
04 Jun 2018	Monday	09:00	16:00	Seaside Beauty	MILLY MILTON	
05 Jun 2018	Tuesday	09:00	16:00	Seaside Beauty	MILLY MILTON	
06 Jun 2018	Wednesday	09:00	16:00	Seaside Beauty	MILLY MILTON	
07 Jun 2018	Thursday	09:00	16:00	Seaside Beauty	MILLY MILTON	
08 Jun 2018	Friday	09:00	16:00	Seaside Beauty	MILLY MILTON	

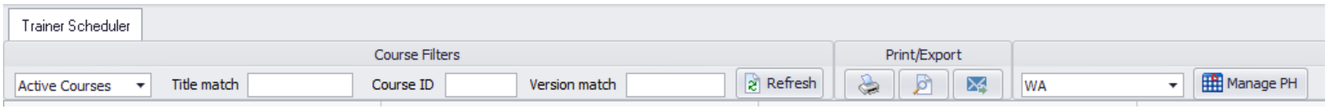
By double clicking on the session it will re-open window and you can modify anything you need too. Or highlight the session and then right click, here you can select from a menu option for editing the details of that session.

Now that you have created the sessions we can now go to the trainer scheduler and see our sessions there.

Viewing sessions for Trainers



When you open the Trainers Scheduler, spend some time exploring as there are many options for viewing here. As you will see we have filters on the top of this area as well. You can filter on active or archived or both, use a filter on courses. i.e Title match, Course ID, version match, State



Refresh- When you add or remove any search on the filters click on the refresh.

Print/Export Area- Here you have 3 icons a Print, Preview and Export.

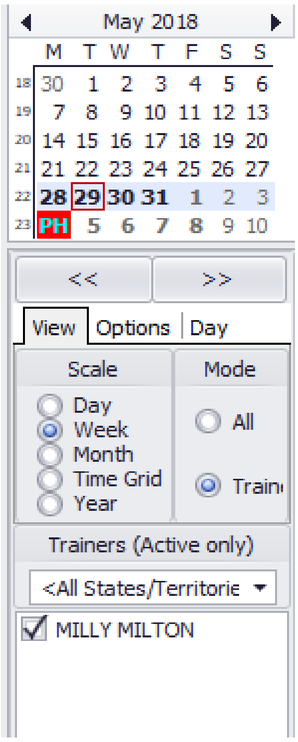
Print Icon – allows you to print to your selected printer.

Preview Icon- allow you to open to preview and make some formatting changes.

Mail Icon- Allows you to sync calendar to outlook.

Manage Public Holidays- once you have entered the public holidays in for a state/s, the follow year can then be copied/cloned.

Trainer Scheduler Preview Filter

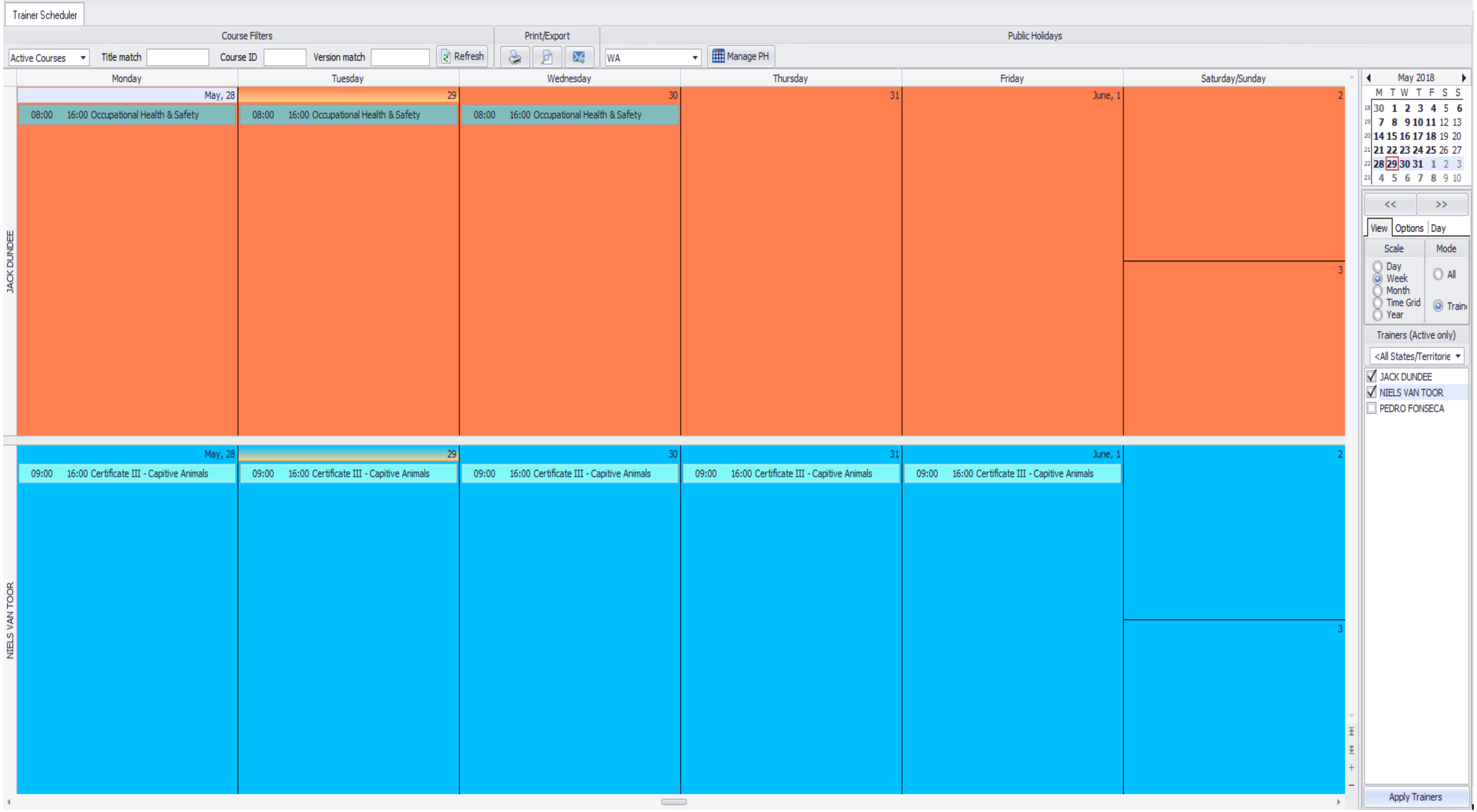


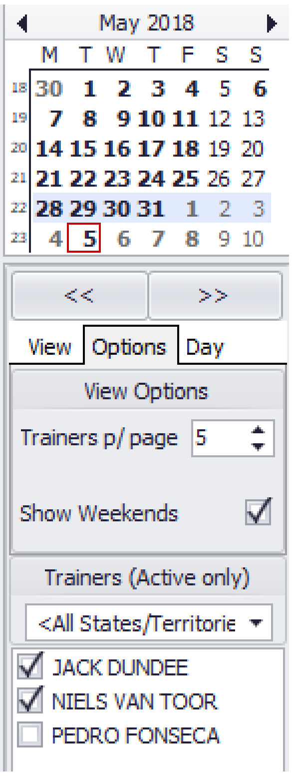
On the right side of the Trainers Scheduler we have a view to select calendar. The left and right arrows at the top of the calendar, go from one month to the next. The left and right arrows at the bottom of the calendar move you from one week to the next. As you change this, it will reflect on the main area of the scheduler.

Next, we have the View, Options and Day tabs.

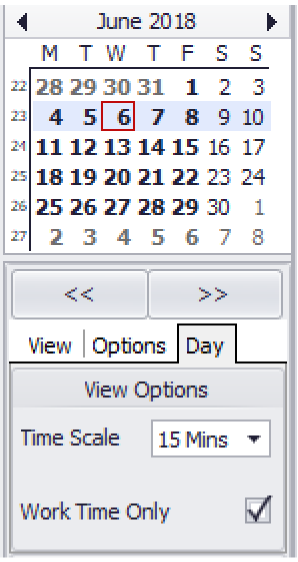
The View Tab- allows you to select the Scale & Mode in which to view the calendar. The Scale criteria is to view either by i.e. Day, Week, Month, Time Grid or Year. The Mode allows you to select the view, being ‘All’ scheduled training sessions or you can select by ‘Trainer’. The Trainer selection allows you to view the period and all selected trainers. See display

Trainer Scheduler – Multiple Trainer View





The Options Tab - Allows you to select how many trainer you would like to view per page, as well as show or not show weekends

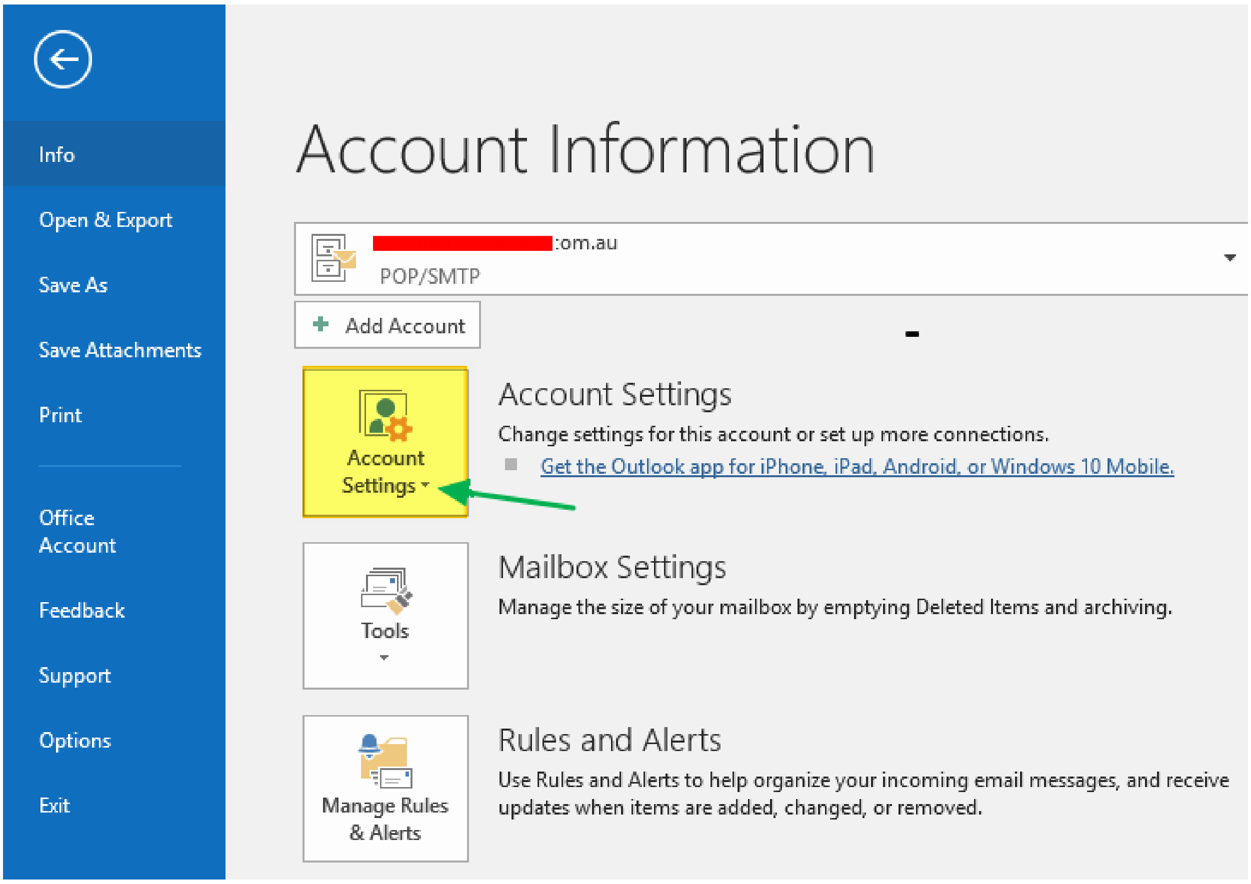


The Day Tab – Allows you to set the time scale in either 15, 30 or 60-minute intervals when viewing the scheduler on the day scale option, as well as setting a work time only view.

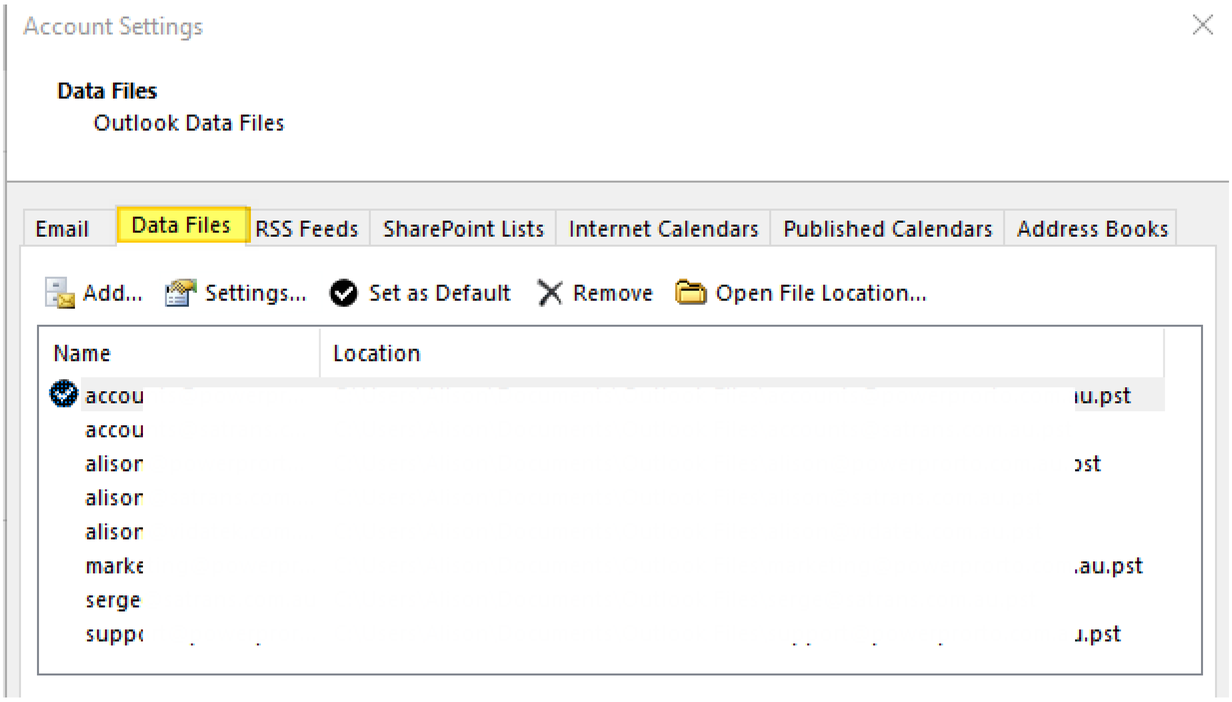
Syncing PowerPro Calendar to Outlook

If you only have one calendar it will automatically sync, it is when you have more than one that it becomes more complex. PowerPro will only sync to a calendar that is linked to an email address. If you have more than one calendar, you will need to make sure that you set Outlook to default this calendar.

To do this go to Outlook, click on the File Menu at the top of the window. Next go to Account Settings, click on the drop-down arrow and select the first option
“Account Settings”.

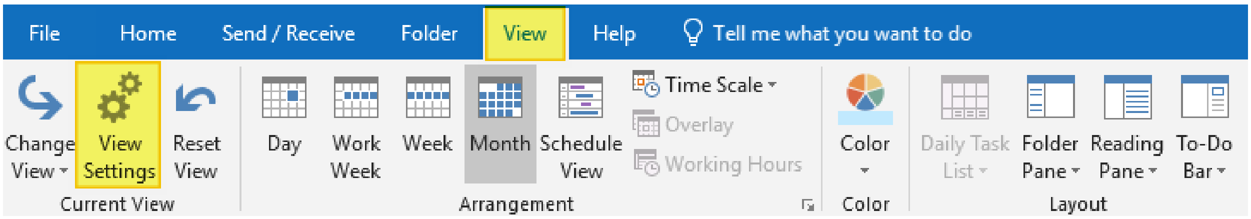


Once you click on Account Settings, you will then see a box appear as below.
Select the 2nd Tab "Data Files", it is here that you need to select the email address associated with the calendar and set it to be the default account for any data files. By highlighting the account name and then selecting the option above here to "Set as Default". As you can see below the first account is selected as the default.

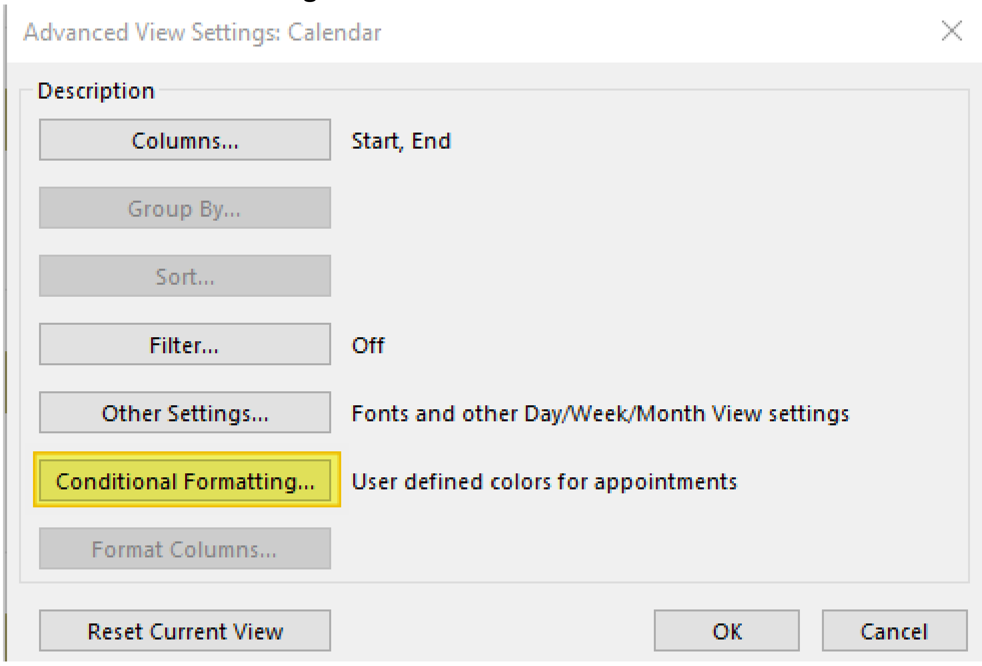


You can set up rules so that you Calendar from PP sync to Outlook in the colours that you would like. This is done using "Conditional Formatting" in Outlook.

To do this in the Calendar in Outlook, go to the "View" Menu, here then select the "View Settings" area.

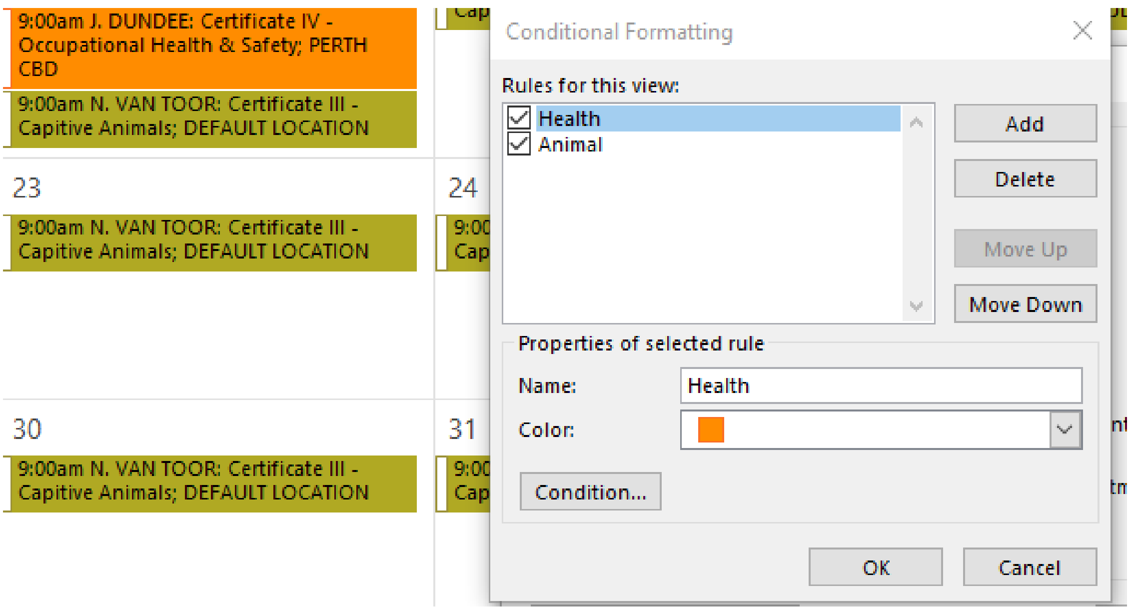


From the View Settings" you will then see "Advanced View Settings: Calendar window". Select "Conditional Formatting".



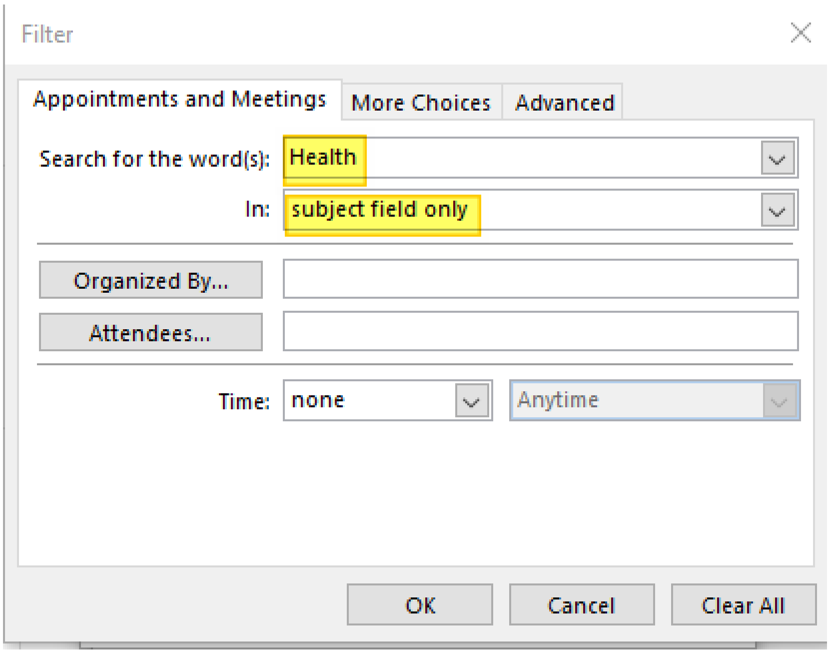
Here you can see we have created two Rules, one for Health and the other for Animal. When we sync from PowerPro

any session that has the word "Health" in the Subject will be colour coded orange and anything with Animals is Olive Green.



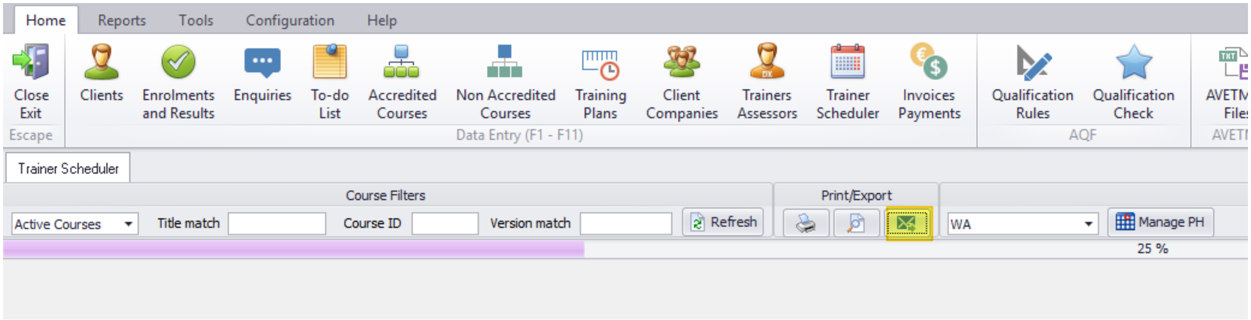
You can use any text that comes into Outlook from PowerPro Calendar, as above i.e. Trainer Name, Program Name, Location. To do this you need to create a condition. After you have created the rule click on the button "Condition"

You will see the below screen. Type in the Key search word and in the search "in" keep this as the "subject field only".



You should now be ready to sync from PowerPro to Outlook.

Go to Trainers Scheduler and click on the email icon as highlighted below, which found under the Print/Export area. You will the progress bar processing, once it has reached 100% you will have been successful.



Now go back to Outlook and view the Calendar, you will see all your courses and in the set colours if you created some rules.