Form 1 – Course Requirements

This is an extract from the full guide [Timetabling Requirements Gathering Forms Guide [PS]]. If you require additional support or have any questions, contact your local [Test & Learn Ambassador].

Introduction

Upon accessing the system, you will be shown all the courses listed on the system that are relevant to you. Please note, there are three tabs on the screen which are permission restricted.

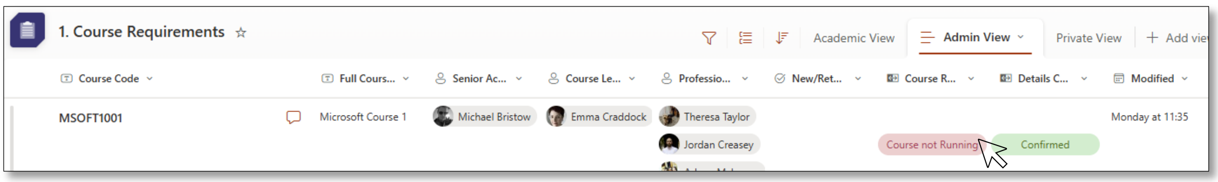
Academic View	Accessible to both the Course Lead/Convener and Administrators
Admin View	Only Administrators can access this tab
Private View	Only the Transformation Team can access this tab

Form 1 (Viewing & Editing Fields)

The ‘Admin View’ tab will show you all the necessary data for the courses associated with you. From release of Form 1, you can see the course code, course name, the Senior Academic Contact, the attached Course Lead/Convener, and the key Professional Services staff (usually up to three). These data fields will be pre-populated by information provided by the Schools.

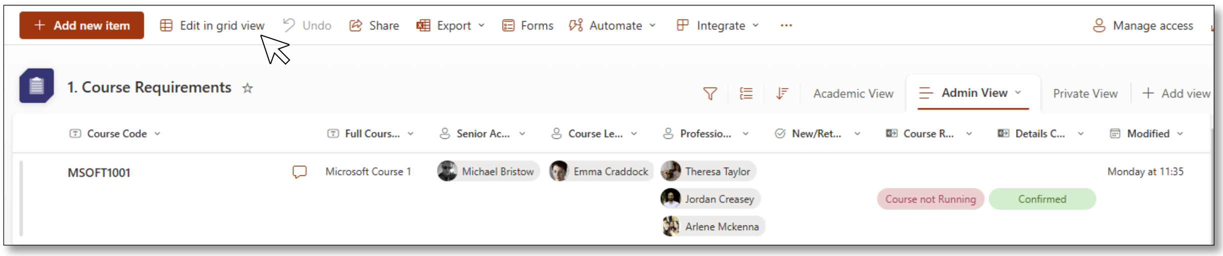
All courses will be set to ‘Course Running’ by default and the field ‘Details Confirmed’ will be set to ‘Click to Confirm’.

Where all course information provided by the Schools remains accurate, then users can make use of the toggle feature to work through courses quickly, confirming which of their courses are running next session and then confirming that the details are accurate. When in ‘Admin View’, you can use the toggle feature by merely clicking on the ‘Course Running’ field and the ‘Details Confirmed’ field to switch to the correct value for the course (Fig 1).



(Fig. 1. Screenshot of cursor selecting ‘Course Running’ field for an individual course to switch the value to ‘Course not running’ for that course)

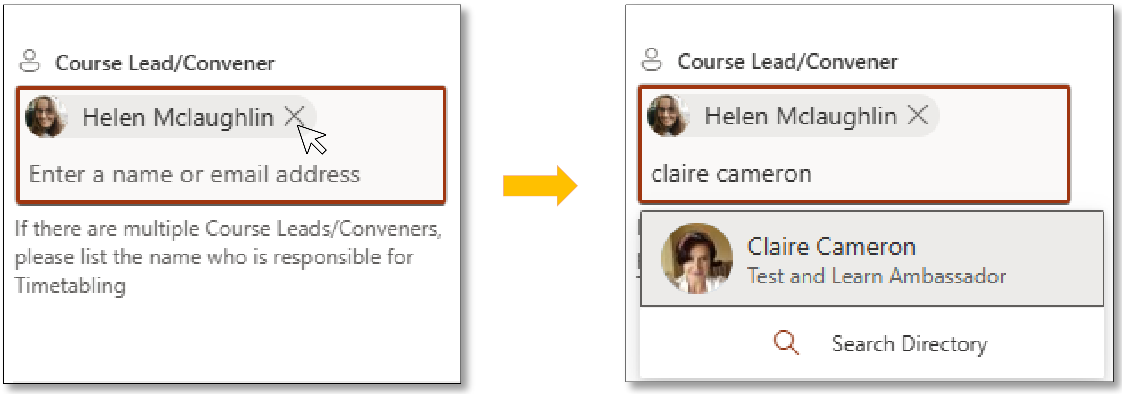
Where an update is required to any of the data fields (such as the ‘Course Lead/Convener’ field), then the data can be edited by selecting the ‘Edit in grid view’ option from the command bar (Fig 2). This will shift the data to an editable table, allowing you to edit fields directly as you see them.



(Fig. 2. Screenshot of cursor selecting 'Edit in grid mode' button in the command bar - an option only in the 'Admin View' tab)

NB users can also edit values through Form 1 itself although for administrative staff this is more limited. To open Form 1, click an individual course's 'Course Code'.

When editing contact fields, remove data by clicking the 'X' icon, then type in the correct name and select the person from the M365 directory (Fig 3).



(Fig. 3 Screenshot of cursor selecting 'X' to remove assigned person from Form 1 field 'Course Lead/Convener', then searching M365 directory for a new individual)

For contact fields, the 'Senior Academic Contact' has overall responsibility for agreeing on the structure and content of programmes (e.g. Programme Directors, Year Group Lead, Head of Subject etc) and is usually the one completing Form 1. Additionally, where multiple Course Leads exist, the 'Course Lead/Convener' field should be who is responsible for timetabling.

NB when adding staff members to Form 1 fields, they must have an M365 account.

Once data for a course is updated, the 'Details Confirmed' field must be marked as "Confirmed" because this indicates the subject is happy with the information. The system will then use the listed "Course Lead/Convener" as the recipient for a course's Form 2.

Form 1 (Add a New/Returning Course)

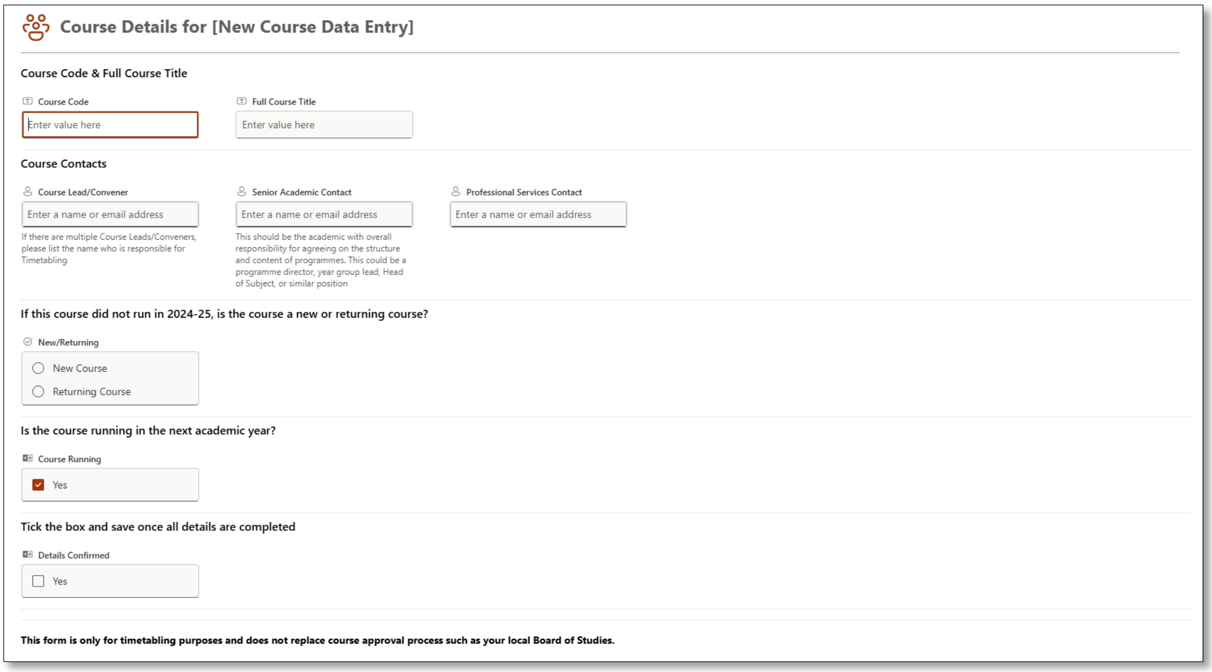
You may be aware of new courses being introduced or existing courses being reintroduced for 25/26. Adding a new course to the Form1 dataset ensures a Form 2 is generated for that course, and then distributed during the second stage of the Requirements Gathering process.

NB Form 1 is ONLY for timetabling purposes. It does not replace course approval process such as your local Board of Studies.

To add a new or returning course, when in the 'Admin View' tab, click on the red 'add new item' button (Fig 4) from the command bar at the top left side of the screen. Please note, new courses should only be added if they have or will be approved by your local Board of Studies.

(Fig. 4. Screenshot of 'Add new item' button on SharePoint site for Form 1)

The new item version of Form 1 (Fig 5) will open, and you can provide the details of your new or returning course.



(Fig. 5. Screenshot of new item version of Form 1)

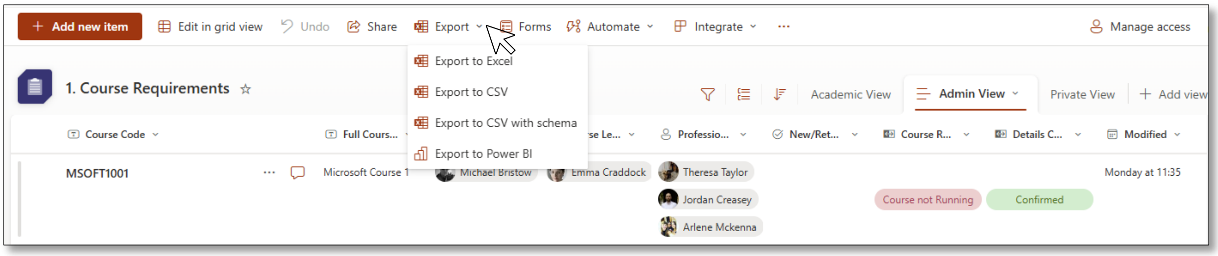
Complete all Form 1 fields for the new/returning course, taking note that: the 'Senior Academic Contact' is the academic with overall responsibility for agreeing on the structure and content of programmes (e.g. Programme Directors, Year Group Lead, Head of Subject etc); and if the course is new and yet to be assigned a course code, leave the ‘Course Code’ field blank.

NB when adding staff members to Form 1 fields, they must have an M365 account.

When you are satisfied the details are accurate, tick ‘Yes’ for the field ‘Details Confirmed’ and save the form. The course will now be included in the dataset and will appear in the SharePoint list for those associated with the course (i.e. the Senior Academic Contact and the PS Contacts).

Form 1 (Data)

Administrators can export the data as needed for local use via the ‘Export’ option from the command bar (Fig 6). This option is not available in the ‘Academic View’ tab.



(Fig. 6. Screenshot of cursor selecting ‘Export’ button in the command bar - an option only in the ‘Admin View’ tab)

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