

# **WEST MIDLANDS COMBINED AUTHORITY**

## **Pre-Employment Training (PET) Planning Portal**

### **Version 1**

This document demonstrates how to update and maintain the course planning portal for pre-employment training programmes for the West Midlands Combined Authority (WMCA) area.

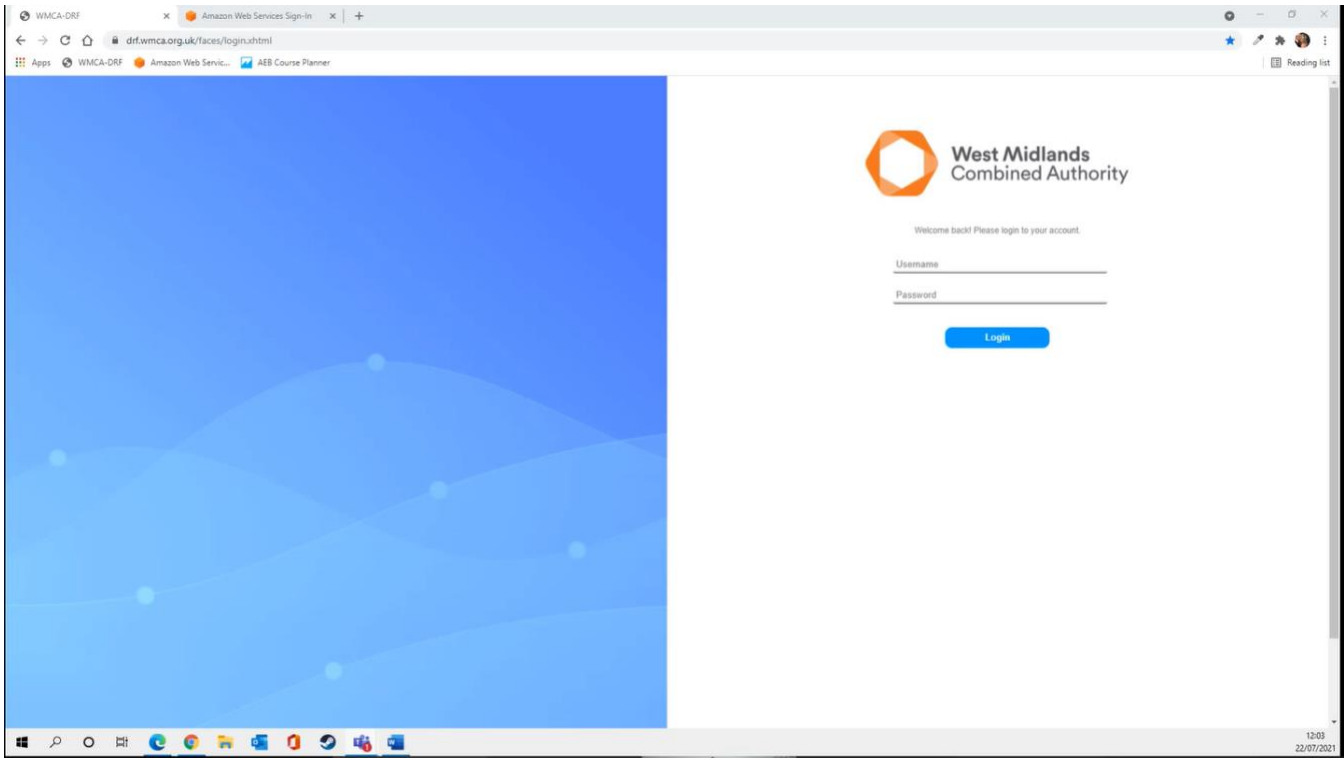
Issue date	July 2021
Amendments made from previous academic year	Refer to Annex 1 of this document.
Senior owner	Iris Both
Document owner	Dan Lawson

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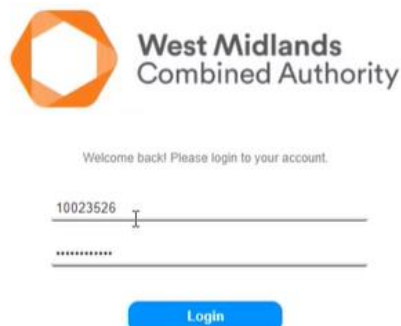
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## Logging in

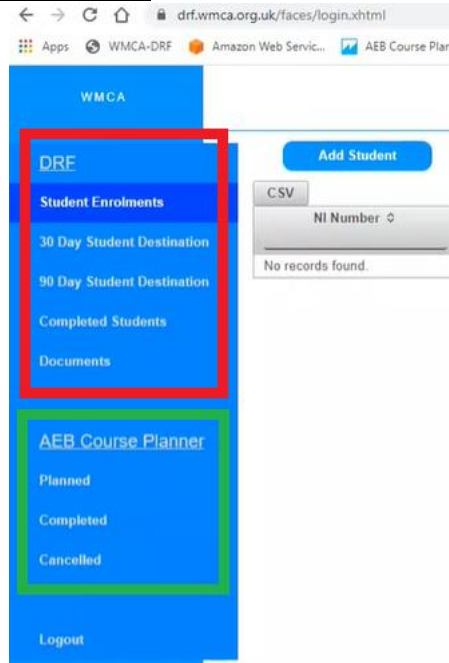
1. The web address to login to the portal is: <https://drf.wmca.org.uk/>
2. Your username and password will have been provided alongside a copy of this user guide.
  - 2.1. Your username will be the UKPRN for your provider and the password will be set by us and cannot be changed.
3. The login screen will look like the below:



4. When you proceed to login, enter your username and password in the applicable fields.  
**REMEMBER: IF PROMPTED, PLEASE DO NOT SAVE THE USERNAME AND PASSWORD TO YOUR PASSWORD MANAGER. WE HAVE FOUND AN ERROR WHICH PREVENTS LOGGING IN DUE TO ALTERNATIVE WMCA USERNAME AND PASSWORDS.**



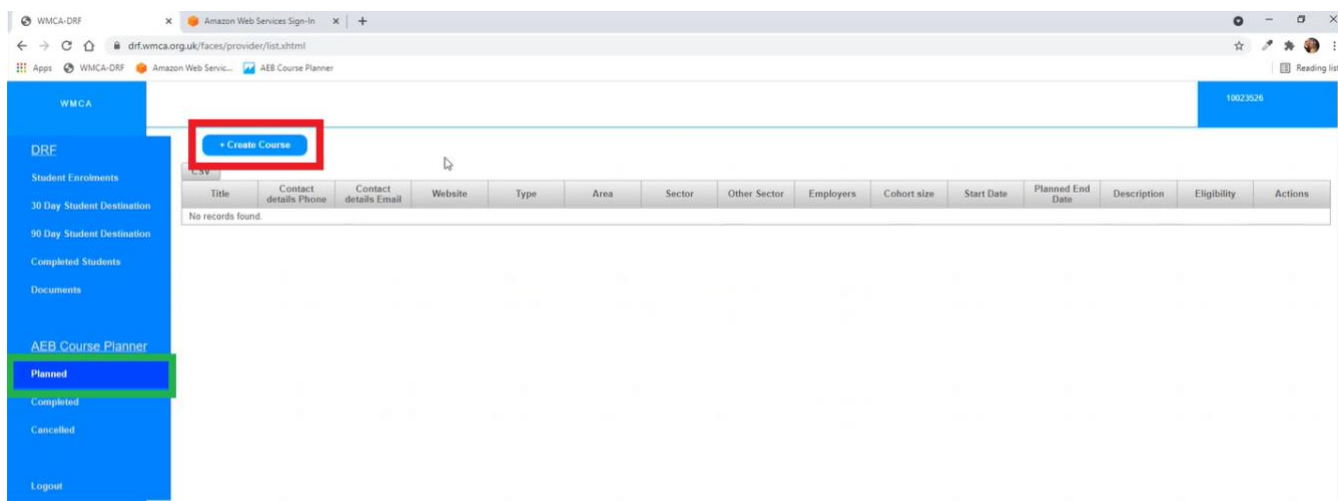
- 5. Once you have logged into the system, you need to disregard the top section under the header “DRF” (Highlighted below with a red box)
- 6. You will be using the “AEB Course Planner” section (Highlighted below with a green box). **Please do not enter any information into the DRF section as this is only for Digital Retraining Fund submissions.**



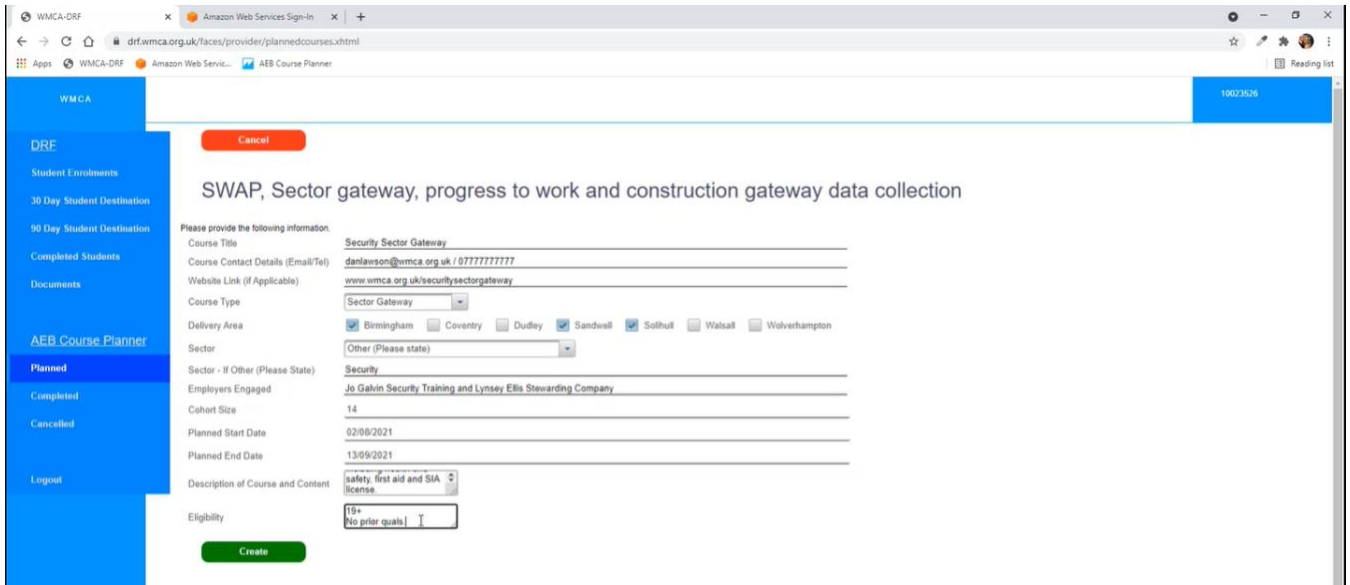
- 7. To logout of the system, you can select the logout option immediately below the AEB Course planner
  - 7.1. It is also worth noting that the system has a 30-minute time out. Please make sure you save any changes as you go. Otherwise you may experience errors and be unable to save changes.

### Planning a Course

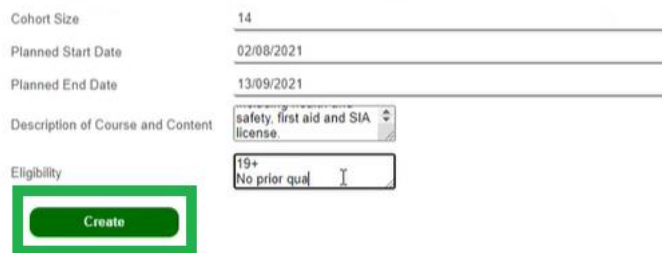
- 8. To plan a course, you must select the “Planned” option (highlighted by the green box below) under the “AEB Course Planner” heading and then the “+Create Course” (highlighted by the red box below) button at the top of the page.



9. Once you have completed step 8 this will take you to the below screen where you will input the following details:
- 9.1. **Course Title** – Please name your course as you see fit and how it would be advertised to residents.
  - 9.2. **Course Contact Details Email** – add in the course tutor or recruiters email address.
  - 9.3. **Course Contact Details Telephone** - add in the course tutor or recruiters telephone number.
  - 9.4. **Website Link** – If you have a link to the course on your website or other communication channels, please add it here.
  - 9.5. **Course type** – You will need to select the course type based on the options given.
  - 9.6. **Delivery area** – You need to select the local authorities that you will be recruiting residents from (you can select more than one).
  - 9.7. **Sector** – Please select from the priority sectors available. If the course is not in one of our priority sectors, please select other.
    - 9.7.1. If you have selected 'Other' please state the sector that your course is being delivered in.
  - 9.8. **Employers Engaged** – please detail the employers that are engaged with this delivery. If you have more than one, please list all of them.
  - 9.9. **Cohort size** – Please state the size of the cohort you will be recruiting and the spaces potentially available.
  - 9.10. **Planned start date** – When does the course start?
  - 9.11. **Planned end date** – When will the course end?
  - 9.12. **Description of Course and Content** – please provide detail behind how the course will be delivered, content, structure and any qualifications the candidate will undertake as part of the offer. This information will be shared with key stakeholders, so it is your opportunity to showcase your offer to them.
  - 9.13. **Eligibility** – It is important to highlight any key eligibility criteria that would be pertinent to the application process



10. To save the course you then select the **“Create”** Button (Highlighted in the green box below)



11. Once the course has been created you will be returned to the “Planned” home screen, like below.

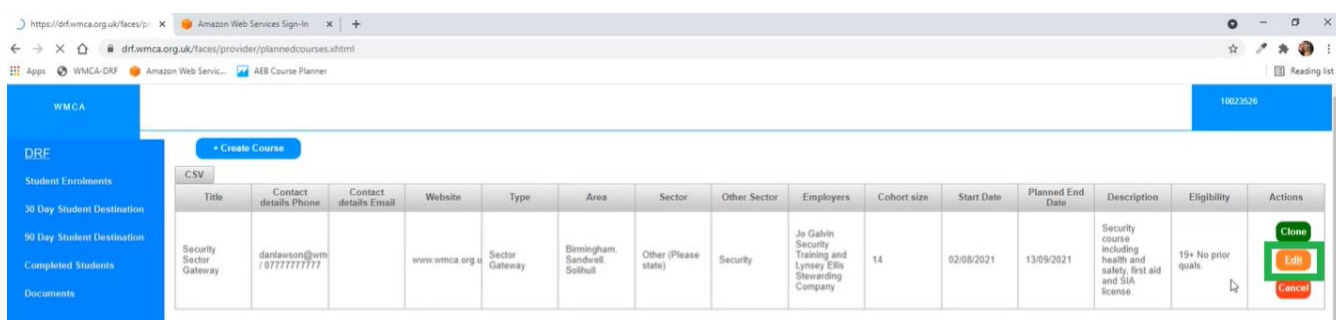
+ Create Course															
CSV	Title	Contact details Phone	Contact details Email	Website	Type	Area	Sector	Other Sector	Employers	Cohort size	Start Date	Planned End Date	Description	Eligibility	Actions
	Security Sector Gateway	danlawson@wmca.org.uk / 0777777777		www.wmca.org.uk	Sector Gateway	Birmingham, Sandwell, Solihull	Other (Please state)	Security	Jo Galvin Security Training and Lynsey Ellis Stewarding Company	14	02/08/2021	13/09/2021	Security course including health and safety, first aid and SIA license.	19+ No prior quals.	<a href="#">Clone</a> <a href="#">Edit</a> <a href="#">Cancel</a>

12. At any point you can extract the data from the portal into a CSV file which can be utilised for other functions. To do this, just select the CSV button above the course title column (Highlighted by a green box below).



## Editing a Course

13. To edit a course, you need to select the orange “Edit” button (highlighted by the green box below) and this will take you back into the form you completed previously.



14. You can then edit the course as you see fit. You may need to change the course tutor or the dates planned and you can do this here.

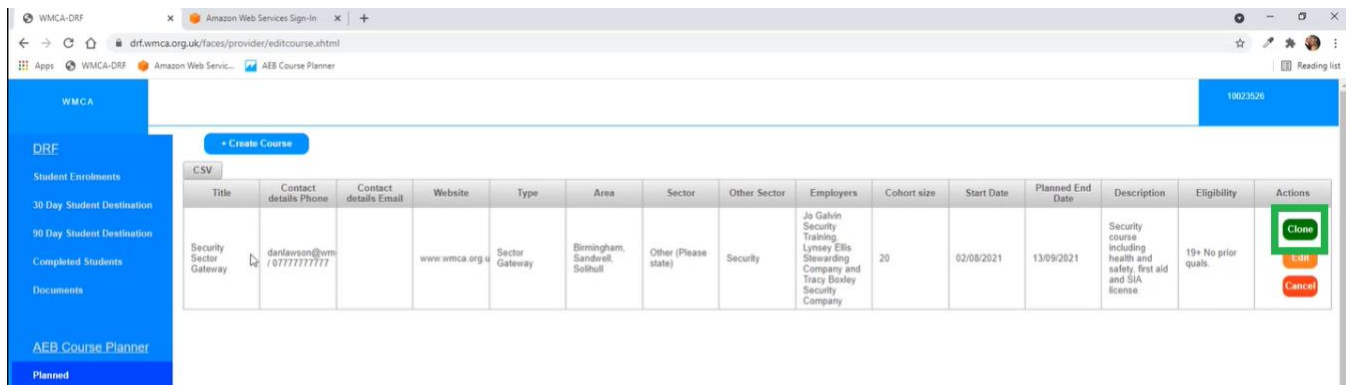
15. Once you have finished editing the information in the form, you then select the “Update” button (highlighted by the green box below) and this will once again return you to the “Planned” home screen.

A screenshot of a form for editing a course. The form has several fields: Employers Engaged (Jo Galvin Security Trainin, Lyns), Cohort Size (20), Planned Start Date (02/08/2021), Planned End Date (13/09/2021), Description of Course and Content (Security course including health and), and Eligibility (19+ No prior quals.). At the bottom, there is a green 'Update' button highlighted with a green rectangular box.

## Cloning a Course

16. To prevent duplication of work and make the system easier to use, we have added a clone function which allows the provider to clone a previously planned, completed or cancelled course. In order to do this, you select the “Clone” button (highlighted by the green box below).

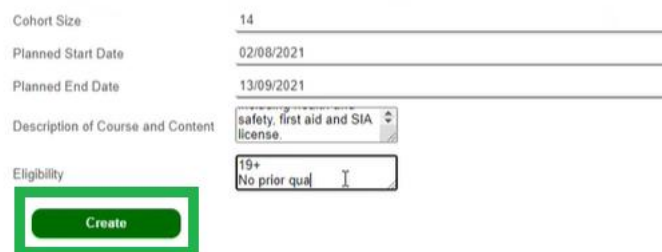
17. You can then edit the details on the form with the new course details, such as a new date, location or change of tutor.



The screenshot shows a web browser window with the URL [drf.wmca.org.uk/faces/provider/editcourse.xhtml](http://drf.wmca.org.uk/faces/provider/editcourse.xhtml). The page title is "AEB Course Planner". On the left, there is a blue sidebar menu with options: WMCA, DRE, Student Enrolments, 30 Day Student Destination, 90 Day Student Destination, Completed Students, Documents, AEB Course Planner, and Planned. The main content area has a "+ Create Course" button and a table with the following data:

Title	Contact details Phone	Contact details Email	Website	Type	Area	Sector	Other Sector	Employers	Cohort size	Start Date	Planned End Date	Description	Eligibility	Actions
Security Sector Gateway	danlawson@wmca.org.uk		www.wmca.org.uk	Sector Gateway	Birmingham, Sandwell, Solihull	Other (Please state)	Security	Jo Galvin Security Training, Lynsey Ellis Stewarding Company and Tracy Boxley Security Company	20	02/08/2021	13/09/2021	Security course including health and safety, first aid and SIA license.	19+ No prior quals	<a href="#">Clone</a> , <a href="#">Edit</a> , <a href="#">Cancel</a>

18. Once you have filled in the form, you can save the course by selecting the **“Create”** button (Highlighted in the green box below)



The form contains the following fields:

- Cohort Size: 14
- Planned Start Date: 02/08/2021
- Planned End Date: 13/09/2021
- Description of Course and Content: safety, first aid and SIA license.
- Eligibility: 19+ No prior qual

The **Create** button is highlighted with a green box.

19. You can clone courses from the Planned, Completed and Cancelled sections.

## Completed Courses

20. Completed courses automatically archive into this section based on the course end date lapsing.

21. You are still able to edit and clone the courses as per the above, but you will not be able to delete them.

## Cancelling Courses

22. At any point you will be able to cancel a course. This could be because the course is no longer going ahead or that the course needs changing completely. You can do this by selecting the below **“Cancel”** button (Highlighted in the green box below)



WMCA DRF 19023528

+ Create Course

Title	Contact details Phone	Contact details Email	Website	Type	Area	Sector	Other Sector	Employers	Cohort size	Start Date	Planned End Date	Description	Eligibility	Actions
Security Sector Gateway	danlawson@wmca.org.uk 07777777777		www.wmca.org.uk	Sector Gateway	Birmingham Sandwell Solihull	Other (Please state)	Security	Jo Galvin Security Training Lynsey Ellis Stewarding Company and Tracy Boxley Security Company	20	02/08/2021	13/09/2021	Security course including health and safety, first aid and SIA license.	19+ No prior quals.	Clone Edit Cancel
Security Sector Gateway	danlawson@wmca.org.uk 07777777777		www.wmca.org.uk	Sector Gateway	Birmingham Sandwell Solihull	Other (Please state)	Security	Jo Galvin Security Training Lynsey Ellis Stewarding Company and Tracy Boxley Security Company	20	09/08/2021	20/09/2021	Security course including health and safety, first aid and SIA license.	19+ No prior quals.	Clone Edit Cancel

23. You can cancel courses in both the Planned and Completed sections of the portal.

## Annex 1 – Changes to Document

No changes as of 28th July 2021