HR Organiser
Professional Development
User Guide

BUSINESS SYSTEMS TEAM

Contact us
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http://www.essex.ac.uk/staff/hr_organiser/

Click HERE to log in
Introduction
This user guide has been designed to help you view and edit your personal learning activities using HR Organiser. It will show you how to:

- View past, booked and cancelled learning activity records
- Book a learning activity
- Cancel a learning activity

Logging in to HR Organiser
You can log in to HR Organiser here: https://hrorganiser.essex.ac.uk

You will need your University username (without the @essex.ac.uk) and your University password. This is the same password you use to log on to the network and your emails.

Having trouble logging in? Your password must not contain any of the following characters " £ ¬ | \ if it does you will need to reset it which can be done here: https://www.essex.ac.uk/password/login.aspx
If you are still having problems please contact the IT helpdesk.

Please note you can only log in to HR Organiser whilst you have a current contract with the University. If you have left and your contract has ended you will no longer be able to gain access to the system.
Professional Development

Once you have logged in to HR Organiser select the **Professional Development** tab at the top of the main homepage. You will then be presented with the below screen.

**What are learning activities and how do I view them?**
A learning activity is any type of learning, for example: an event, a course, a workshop, a conference etc. This screen allows you to view, book and cancel learning activities.

Where possible, past learning events have been uploaded in to HR Organiser from legacy systems.

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Here is a list of the learning events you have attended/are booked on. You can amend the view by choosing an option from the drop down list to the right hand side. You can choose between all, booked, current, cancelled, completed and expired.

Here you can add your own personal learning activities to the system. For example if you have attended an external course, workshop, conference etc.

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Here you can find learning evaluations. After the course has taken place you will receive an email with a request to log in to HR Organiser to complete an evaluation.

You can sort any columns by clicking on the headings: Event name, Status, Start date, Failed / reason, Renewal, Cost.
How do I find out what learning activities are available?
To search for a course click on the magnifying glass, which can be found on the main **Professional Development** tab next to **Add personal learning**.

You are then presented with the below screen:

Use the **Search for** box to search for available courses. For example enter ‘manage’ to load all the courses with the word manage in them. You can press enter or click on the **Search** button at the bottom of the window.

You can narrow your search by using start and end dates. For example you might want to show all courses being held in the Autumn Term.

Un-tick **Only show courses with availability** to view all courses that the system holds.

Click **Search** to search and display results.

Click **Cancel** to cancel the search and return to the **Professional Development** screen.
Viewing learning activity results
The results are displayed below. Each result details the course name, the training hours, start and end date(s), start and end time(s) and the room number.

The symbol ‼️ indicates a particular course is made up of modules

Click Cancel to cancel the search and return to the Professional Development screen
Viewing modular course details

A modular course is a programme of courses. **Participants must only book if they are able to attend all dates.**

Here is a brief description of the course details

Click here to proceed to the **Course booking details** page

Click in this area to view individual dates of the course, spaces available and a list of attendance dates that you are expected to attend are displayed.

Please note that times may vary so **do not** book if you cannot attend all dates

Click the **Cancel** button if you decide you do not wish to book on the course
Booking a course

The course title, start and end date and start and end times are displayed. The attendance dates that you are expected to attend are displayed. Please do not continue booking if any dates are inconvenient.

You can select why you are booking on the course using the drop down menus. You need to select the Origin of request and the Reason.

The course overview is displayed and also a list of objectives.

Other information includes any mobility constraints or dietary requirements.

Mobility constraints are uploaded from iTrent. To add or amend details, please update the information on your Personal details page (instructions follow on the next page).

Click the Cancel button if you decide that you do not wish to book a place.

Click the Save button to book your place. Please save the automated confirmation email/diary appointment to your outlook calendar and set a reminder.
Adding/editing mobility constraints

If you have any special requirements you can enter them by clicking on the Personal tab and then on Special Requirements which is on the right hand side. Adding these will automatically notify the trainer of your requirements when you book your place on a course.

Here you can add/edit any special requirements you may need when attending a learning event. For example, visual or dietary requirements.

Click on the Save button to confirm your changes.

Click on the Cancel button to close the page without saving your changes.
How do I cancel my place?

If you wish to cancel a course you have already booked on, select the course from the **Professional Development** tab. Your course booking details will be displayed. Here you have a drop down list for cancel reason. Select the appropriate reason from the list. Click the **Save** button to confirm cancelation of the course. Click on **Cancel** to close the window without saving your changes.

If dates scheduled are not convenient please cancel your place and rebook on an alternative date.

Click on relevant Learning activity to load the **Course booking details** form.

Select the appropriate reason from the **Cancel reason** drop down box.

Click the ‘**Save**’ button to cancel your place. An automated email will be sent requesting you to remove your outlook diary appointment.

Click the **Cancel** button if you decide that you still wish to attend.
How do I add details of a personal learning event?

Here you can add details of other courses you have attended. For example external courses, workshops, conferences etc.

Click on the **Add personal learning** button on the right hand side of the screen.

The below screen appears. Here you can enter the details of your learning event.

- Add the title of the event, workshop, or conference attended
- Tick if the event was attended at the University but was not booked via HR Organiser
- Add the start and end dates
- Select the duration of the course
- Add in the learning hours
- An event code can be added if it is known
- Add the grade attained if appropriate

Click on the **Save** button to confirm your changes and **Cancel** to exit the window without saving.
How do I log out of the system?

Click the people profile icon at the top right hand screen and select **Logout**