North Dakota University System
Enterprise Learning
Training Manual
PEOPLESOFT
VERSION 8.9

ENTERPRISE LEARNING

ENTERPRISE LEARNING

OVERVIEW

The Enterprise Learning business process in PeopleSoft Human Resources helps you meet your organization's training needs.

To streamline Enterprise Learning, you set up standard codes in several areas (i.e. information about courses, instructors, and outside vendors). Once this data is in the system, you can easily administer course sessions and training programs.

Courses are the foundation of in-house course session administration for your organization. Before you set up course sessions, you set up the courses in your system. You use course codes to track the external courses that your workers attend frequently, such as classes offered at local colleges or trade associations.

Once you set up your course information, you specify a course structure. You can group courses into categories and subcategories and place them in a training catalog that you define for your organization. This level of organization enables you to work with an additional degree of accuracy when you administer and plan training for your workforce.

Before you set up training courses, you define several areas that are related to enterprise learning. This includes:
- Course components (vendors, locations, training facilities and instructors)
- Course objectives and requirements
- Codes for tracking the education and skills employees had prior to joining your organization.

You also update the qualifications and skills of employees as they enroll in and take the courses that you administer as part of the Enterprise Learning business process.

To set up training programs and track employee skills and accomplishments, you:
- Create courses in the Course Table, where you define course information and how courses are categorized in your company training catalog.
- Identify course prerequisites and certifications.
- Specify the standard equipment and materials that are required to administer the courses.

OBJECTIVES

At the completion of this session, you will be able to do the following items from the list below:

1. Understand the core tables that drive the Enterprise Learning module
2. Create Training Courses and associated Course Sessions
3. Add an External Trainee to the system, in order to enroll them in courses, or use them as an outside instructor.
4. Enroll students in Course Sessions, using standard Course Session Enrollment, and also using Course Session Waiting Lists, Course Auto Enrollment and Express Rescheduling.
5. Close completed or cancelled sessions.
6. Utilize Course/Session Evaluations.
7. Access/Update Student Training and Student Course Enrollment information.
8. Track/update miscellaneous student information, such as education, languages, licenses/certifications, memberships and test results.
9. Utilize Enterprise Learning reports.

SETUP TABLES

The following tables are essential to the setup of your Enterprise learning system. They are set up individually by each campus.

- Category/Subcategory Table
- Equipment and Materials Table
- Instructor Table
- Vendor Table
- Vendor Contact Table
- Training Facility Table
- Course Table
- Course Session Planner
- Course Session Table
- Training Program Table

CATEGORY/SUBCATEGORY TABLE

This table is the first step in organizing training courses to create a course catalog. Category code is the highest level, and subcategory further defines the category. For example NDSCS HRMS is the Category, with subcategories being New Employee Orientation and Safety/Risk Management. This table also defines duration and capacity.

Go to **Setup HRMS>Product Related>Enterprise Learning>Category/Subcategory.**

Category Table Page

On this page, you add a new value (in this case, SCS HR) and then fill in the description, short description, subcategory code, subcategory description, and subcategory short description. You click on the + icon to add each new subcategory.

Category Table Page

The Duration/Capacity page describes the duration time and number of students for each subcategory.

EXERCISE: SETTING UP CATEGORY/SUBCATEGORY TABLE

The following exercise is designed to review and enhance your understanding of the Category/Subcategory Table. Higher Education and the State will utilize Category and Subcategory differently.

Go **to Setup HRMS>Product Related>Enterprise Learning>Category / Subcategory Table.**

1. Click on the Add a New Value hyperlink
2. Enter a new Category Code, alpha numeric, up to 10 digits. Examples would be: BSC HRMS, DSU Safety, etc. Click the Add button.
3. Enter the Description for the Category you are creating.
4. Enter the Short Description.
5. Under the Category Table group box, there are two tabs. The first is **Description**, and it should be selected. The first row on Subcategory Code should default to UNKNOWN-this is required for all Category tables; leave it there.
6. To add a Subcategory, click the "+" sign to the far right of the first row of data
7. Enter up to a 10 digit Subcategory code to associate with this Category. Subcategories are a further breakdown of the category you are creating. For example, if DSU safety is the category, then a subcategory might be Lock out/Tag out, or Lifting.
8. Enter a description of your subcategory code.
9. To add a row, click the "+"; to delete a row, click the "-"
10. After you have added all the subcategories you require, click on the **Duration/Capacity** tab. The subcategory codes that you have entered copy over to this page.
11. If you know the duration time, enter it and associate it with a unit of measure (values are day, hour, month, week and year) for each subcategory listed. If the minimum and/or maximum number of students is known, enter those values as well. If none of this data is known or concrete, you may leave it blank: it is not required information.
12. Click the "save" button at the bottom left of the page to save this record.

EQUIPMENT AND MATERIALS TABLE

On this table you define the various pieces of equipment that might be used during training. For example, computer, whiteboard, projector, books, etc. This table is not intended to be used to inventory ALL equipment, only to provide a list of different equipment types. For book type equipment, you may specify the author, year published, and the ISBN (International Standard Book Number).

There are already a number of items on this setup table. This process is used if you wish to add a new item.

Go to **Setup HRMS>Product Related>Enterprise Learning>Equipment and Materials.**

Equipment and Materials Table

On this set-up page, you would add a value, use the dropdown to choose the most accurate equipment type, add a description, and a short description. You would only use the bottom section of the page for publications.

EXERCISE: SETTING UP EQUIPMENT AND MATERIALS TABLE

The following exercise is designed to review and enhance your understanding of the Equipment and Materials Table.

Go to Setup HRMS>Product Related>Enterprise Learning>Equipment and Materials.

1. Click on the Add a New Value hyperlink.
2. Enter a new Equipment/Materials code. Code is 4 digits and should be descriptive of equipment/materials being defined. Click the Add button.
3. Select Equipment Type from drop down list.
4. Enter the Description for the Equipment type you selected.
5. Enter the Short Description.
6. If the Equipment Type selected is a type of publication (example: instructor text or student text), additional information MAY BE entered under the Publications area on the page. The following data may be entered:
   a. Author
   b. Year Published
   c. ISBN
7. Click the "save" button at the bottom left of the page to save this record.
8. To add more equipment/materials, click on the "add" button at the bottom right of the page, and repeat the above procedure.

INSTRUCTOR TABLE

The instructor table contains those persons in your organization who teach the courses you administer. It identifies which courses these persons are qualified to teach. This presumes that the Course Table has already been established. This also presumes that instructors you will be using/adding already exist in PeopleSoft. Instructor table values are based on EMPLID.

Go to **Setup HRMS>Product Related>Enterprise Learning>Instructors.**

Instructors Page

This is a two-step process. First, you search to see if the person is already set up as an Instructor. On the Search page, enter the person's EmplID in the Instructor ID field or first name in the Name field and last name in the Last Name field. Click on Search.

If no matching values are found, click on the Add a New Value tab. This is the second part of the search, where you are searching to see if they exist in PeopleSoft at all.

Instructors

Find an Existing Value | **Add a New Value**

Instructor ID: [   ] 🔍

[Add]

Find an Existing Value | Add a New Value

Look Up Instructor ID

EmplID: [begins with ▾] [   ]

Home

Instructors

Find an Existing Value | **Add a New Value**

Instructor ID: [   ] 🔍

[Add]

Find an Existing Value | Add a New Value

a

Once you have either found the person is already in the system as an Instructor, or you add them to the Instructor table once you have found the appropriate EmplID, open the Instructor table at **Setup HRMS>Product Related>Enterprise Learning>Instructors.**

1. Enter an Effective Date and ensure the Status is "Active."
2. If the person has an employment record in the system, the person will default in as "Internal." Because all 11 campuses plus State Government share the database (AND this instructor table), anyone in the database with an active employment record will default in as Internal.
3. Enter the person's Area(s) of Expertise.

Instructor Profile Page

Next, click on the Qualification tab.

Qualification Page

In the Course Code field, look up or enter the course code for the course the instructor is qualified to teach. If there is more than one course, click on the + icon and add courses until all courses the person is eligible to teach are represented.

Click on Save.

If a matching value is found, pull up the instructor.
Click on the Qualifications tab.
Either verify the Course Code field of add values clicking on the + icon and adding courses until all the course the person is eligible to teach are represented.

EXERCISES: USING THE INSTRUCTOR TABLE

The following exercises are designed to solidify and enhance your understanding and use of the Instructor Table.

Go to **Setup HRMS>Product Related>Enterprise Learning>Instructors.**

Test Scenario 1: Adding an instructor who is already in PeopleSoft but not yet on the Instructor table (examples are active or terminated employees or external trainers who already exist in the system as a Person of Interest).

1. Click on the "search button" to see a list of current instructors. Verify that the person you want to use as an instructor is not there. Then, click on the Add a New Value hyperlink.
2. Click on the magnifying glass icon to locate the EMPLID of the person you want to add as an instructor. Enter search criteria: EMPLID, name (firstname space lastname) or Last Name. Click on the "Lookup" pushbutton.
3. Choose the applicable EMPLID from the search list returned. This will take you to the Add a New Value page, and the instructor id field will be populated with the EMPLID you selected. Click on the "add" button.
4. You are now on the Instructor Profile page. The field Internal/External will be automatically populated, depending on whether the Instructor ID/EMPLID you selected was an employee (internal) or non employee (external)
5. If the person is Internal, the following fields will be unavailable for entry: Vendor ID, School Code and School name.
6. If the person is external, Vendor ID, School Code and School Name fields may be populated, although they are NOT required fields. Enter data in these fields as applicable. If the instructor works at a school that you added to the School Table, select a school code. When you move out of this field, the system enters the School Name field. To enter a school that isn't in the School Table, bypass the School Code field, and manually key the School Name.
7. Per unit cost: leave blank.
8. Area of Expertise (optional): enter a brief description of the instructor's area of expertise.
9. Group Message (optional): enter further comments about the instructor's area of expertise.
10. Click on the Qualification tab.
11. In the Course Code field, use the magnifying glass icon to search for the courses you wish to associate with the instructor. Click on the "+" to add rows, or the "-"to delete existing rows. If you do not fill in this field, this Instructor will not be "qualified" to teach any courses.
12. If this course code you are looking to associate with the Instructor does not exist, you may open a new window, navigate to the Course Table, add the course, and then return to the Instructor Table, and associate the new course with the Instructor.
13. Matching Competencies and Matching Accomplishments are not being implemented. Do nothing with this area.
14. Click on the "save" button at the bottom left of the page to save the record.

15. To add another instructor, click the "add" button at the bottom right of the page, and repeat this procedure.

Test Scenario 2: Adding an instructor who does NOT exist in the database (example is an outside vendor).

1. Click on the "search button" to see a list of current instructors. Verify that the person you want to use as an instructor is not there. Then, click on the Add a New Value hyperlink.
2. Click on the magnifying glass icon to locate the EMPLID of the person you want to add as an instructor. Enter search criteria: EMPLID, name or Last Name. Click on the "Lookup" pushbutton.
3. Verify that the search criteria entered DOES NOT return the name/EMPLID you are searching for. In this case, you will need to contact the HR/Payroll office to have the person added to PeopleSoft as a Person of Interest – External Instructor.

VENDOR TABLE

This table is used to define outsourced services. Types of vendors include training materials, training provider, equipment rental, facility rental, etc. The table also includes a field for corresponding AP Vendor ID, but there is no direct link between the two tables. You will also define whether the Vendor business is minority owned and record the Vendor Address here. If you know that the Vendor business is minority owned, check the appropriate box—otherwise leave it unmarked.

Go to **Setup HRMS>Product Related>Enterprise Learning>Vendors.**

Vendors Page

Vendor Profile Page

EXERCISE: SETTING UP THE VENDOR TABLE

The following exercise is designed to solidify and enhance your understanding and use of the Vendor Table.

Go to **Setup HRMS>Product Related>Enterprise Learning>Vendors.**

Click on the "search button" to see a list of current Vendors. Verify that the vendor you want is not already there. Then, click on the <u>Add a New Value</u> hyperlink.

1. Enter a new Vendor code, alpha numeric, up to 6 digits. Vendors that begin with ND indicate setup by State. Vendors that begin with NDU indicate setup by Higher Education. Increment by 1 (example: NDU001). Click the Add button. This will bring you to the Vendor Profile page.
2. Enter the Vendor Description and Short Description
3. Identify the Vendor Type: select from the drop down list displayed
4. Accounts Payable Vendor ID: enter the AP Vendor ID, if known. This table is not linked directly to AP, so no edits are available. If you need to enter a new Vendor, you will contact the Accounts Payable department on your campus for their corresponding Vendor ID.
5. Click on the USA flag icon. Minority Owned check box will appear. Check this box, if applicable.
6. Click the Address tab. Fill in the fields, as applicable:
    - Training Cost Estimation group box: contains the fields Per Unit Cost and Cost/Unit. This section is being implemented.
    - Business Address: fill in the address information for the Vendor
    - Comment: enter notes or comments about this vendor, if applicable
7. Click the "save" button at the bottom left of the page to save this record.
8. To add more Vendors, click the "Add" button at the bottom right of the page.
9. Proceed to Vendor Contact page to enter more Vendor information. Go to **Setup HRMS>Product Related>Enterprise Learning>Vendor Contacts.** If you navigate to this page directly from the Vendor table, the Vendor ID that you last worked with will copy over to the Vendor ID field here.

VENDOR CONTACT TABLE

This table is tied to the Vendor # on the Vendor table. You define contact information here, such as a phone number. Also record address: if it is the same as the Vendor, you may default that here by clicking on the "same address as vendor" check box.

Go to **Setup HRMS>Product Related>Enterprise Learning>Vendor Contracts.**

Vendor Contact Table Page

EXERCISE: SETTING UP THE VENDOR CONTACT TABLE

The following exercise is designed to solidify your understanding and use of the Vendor Contact Table.

Go to **Setup HRMS>Product Related>Enterprise Learning>Vendor Contacts.**

If you navigated here directly from the Vendor Table, the last Vendor ID you worked with will default into the Vendor ID field here. If not, or you wish to enter contact info for a different Vendor, enter the appropriate Vendor ID, or click on the "search" button to see a list of Vendors. You may limit the search by selecting a Vendor Type and/or by entering a description. This will take you to the Vendor Contact Phone Number page.

1. **Contact #:** you may enter multiple contacts on the Vendor Contact table. The number "1" defaults. Enter the contact name (example Henderson, Harry), title, and contact type info (for example marketing director), if known.

2. **Contact Phone Numbers:** enter the phone number for Contact #1, select the phone type from the drop down list provided, then enter the phone number, with area code followed by the 7 digit phone number. If more than one phone number is applicable for this contact, add a row by clicking on the "+" sign across from the phone field.

3. **Optional:** to add more contacts, click back on the Contact # field, and click on the "+" sign to the far right of that field. A row will be inserted, and Contact number will be incremented by one: in this scenario, we already have contact #1, so the number 2 will default in for the second contact.

4. Go to Contact Phone Numbers and enter the phone number(s) information for the second contact.

5. Click on the Vendor Contact Address tab. Notice that if you entered more than one Contact, a row exists on this page for each contact you entered. To view both contacts on one page, click the "View All" hyperlink across from the Vendor Contact group box header. To view one at a time, click the right/left arrows next to the "View All" hyperlink.

6. For each contact, enter the business address information. Initially, the address fields are not enterable. If the business address is the same as the address on the Vendor Table, click the check box for "Same Address as Vendor". When you do this, the address you entered on the Vendor Table will dynamically populate here.

7. If the business address is different from what is on the Vendor Table, go to the Country field and enter USA, and tab out of the field. When you do this, the address fields will become enterable. Enter the appropriate address information.

8. Click on the "save" button at the bottom left of the page to save the record.

9. To enter contact info for more Vendors, click on the "Return to search" button, and repeat the above steps.

TRAINING FACILITY TABLE

This table defines the location where courses are held, contacts, equipment available (and costs), training rooms (and fixed equipment), and directions to the facility. The address defaults in based on the location code assigned (if assigned: edits from the Location Table). If no location code is assigned, you will enter the address information manually. Click on Search to get a full list of Training Facilities in the system. If the facility you need is not listed, you will add it by using this process.

Go to **Setup HRMS>Product Related>Enterprise Learning>Training Facilities**.

Training Facilities Page

Click on Add a New Value. The facility code is your three-digit company code plus the next available three digit number (i.e.SCS016).

Address Page

Enter the five-digit number that corresponds to your Business Unit (i.e. NDSCS)

Use the lookup glass on Location Code to choose a location code. The Facility Name, Short Description and Address should default in.

Click on the Contacts and Equipment tab.

Contacts and Equipment Page

The Training Facility, Business Unit, and Location will carry over from the previous page.

Enter a Contact Name.

Enter a Vendor ID, if applicable.

Enter a business telephone number.

Use the lookup glass to choose and Equipment Materials Code. Add the quantity available. Leave cost blank.

Click on the + icon to add additional equipment.

Click on the Training Rooms tab.

Training Rooms Page

The Training Facility, Business Unit, and Location information will carry over from the previous page.

You will need to enter a room code, room name, building number, floor number, and maximum number of students. Leave per unit cost blank. Check the box to indicate whether or not the room is active.

Use the lookup glass to search for an equipment code. Indicate the quantity available in the room. Click on the + icon to add additional equipment.

Click on the + icon under the Training Rooms band to add additional rooms.

Go next to the Directions tab.

Directions Page

Enter the narrative directions.

Click on Save.

EXERCISE: SETTING UP THE TRAINING FACILITY TABLE

The following exercise is designed to solidify and enhance your understanding and use of the Training Facility Table.

Go to **Setup HRMS>Product Related>Enterprise Learning>Training Facilities.**

1. Click on the Add a New Value hyperlink
2. Enter a new 6 digit Training Facility Code. The naming convention is as follows: For Higher Education, the first 3 digits normally represent Business Unit, and the last three increment by one. This is the same naming convention as used for the Course Table. For facilities not specifically "owned", the first 4 digits are alpha and represent the first 4 letters of the facility name, and then increment by 1. For example, Comfort Inn Bismarck might be COMF01. Comfort Inn Fargo might be COMF02. Use the Facility Name field to indicate location of common facilities.
3. Click the Add button. This will take you to a series of 4 chained pages to fill out: Address, Contacts and Equipment, Training Rooms, Directions.
4. On the Address page, fill in the appropriate address information.
   - **Country Code:** defaults to USA and should remain as such.
   - **Business Unit:** select the business unit associated with this training facility. Based on your choice, the selections available to you in the Location Code field will be limited.
   - **Location Code:** an optional field. Based on your choice in the Business Unit field, the selections available to you in the Location Code field will be limited. For example, if business unit 11000 (OMB) is selected, the SETID associated with that business unit is STATE. Only location codes associated with the SETID STATE can then be selected. If you select a location code, the facility address will be automatically populated (it edits from the Location Table). If you leave it blank, then you will manually enter the address of the facility.

5. Click on the Contacts and Equipment tab. Fill out the following fields:
   - **Training Facility, Business Unit** and **Location Code:** will be populated based on the address information provided on the previous tab
   - **Contact Name:** the name at the facility to contact regarding scheduling, etc. Only one contact may be assigned.
   - **Vendor ID:** if this facility has been set up as a Vendor on the Vendor table, input or look up the Vendor ID here.
   - **Contact Phone Numbers:** enter Phone Type and phone number for the facility. You may enter more than one phone number by clicking on the "+" sign to the far right of the phone number field. However, you may NOT enter more than one TYPE of phone number. The system views this as a duplicate key value, and you will get an error.
   - **Equipment and Materials Available**: this information relates specifically to the facility you are setting up.
   - **Equipment/Materials Code**: enter the code for the specific piece of equipment/material. Example: Whiteboard, Computer, Dry Erase Markers, etc.
   - **Qty:** how many of the specific piece of equipment or materials exist at this facility.
   - **Per Unit Cost**: if you know the cost to use the individual piece of equipment/material, enter it here.
   - **Cost Unit:** define the cost unit: Day, Hour, Week, Month, Year
6. To add multiple pieces of equipment/materials, click on the "+" sign to the far right across from the Cost Unit field, and repeat steps i – iv.
7. Click on the Training Rooms tab. Fill out the following fields:
   - Training Facility, Business Unit and Location code are dynamically populated based on the address information provided on the Address table
   - Training Rooms:
     i. Room Code: enter the Room Code for the room. This might be the room number in the facility, or if the room is known by a name, it's name
     ii. Room: enter the description of the room and/or it's name
     iii. Floor#: enter the floor number of the room location
     iv. Per Unit Cost: enter the cost to use the room, if known
     v. Currency: Defaults to USD
     vi. Cost Unit: define the cost unit for this room: Day, Hour, Week, Month, Year
     vii. Maximum Nbr of Students: enter the maximum number of students for this room
     viii. Room Active: check this box to indicate this is an active training room

- Fixed Equipment/Materials: if this room has equipment/materials that are specifically assigned to it ALONE, identify each along with the quantities available. Insert a new row of data for each item.
    i. Equip Code: enter or look up the Equipment Code
    ii. Quantity: enter the quantity of room materials that are available for this equipment/material item
8. Click on the Directions tab. Training Facility, Business Unit and Location will be dynamically populated based on information provided on the Address tab.
    - Input directions to the facility in the text box provided.
9. Save the record by clicking on the "save" button at the bottom left of the page.

COURSE TABLE

On this table, you will define course information, prerequisites, instructor qualifications, and equipment needed. Accomplishment data are delivered values, and relate to education degrees. Each campus will be responsible for the initial creation and maintenance of courses specific to its organization.

Go to **Setup HRMS>Product Related>Enterprise Learning>Courses.**

Course Page

Search first, using your three-digit company code (i.e. SCS) to see if the course already exists. Note the last course code used.

If your course is not in the list, note the next available number, and then click on Add a New Value.   Course is a six digit code. Use your company code, plus the next available course number (i.e. SCS209).

Course Profile Page

Enter a title, short title, course status, creation date, and whether the course is Internal or External.   Click on the Session Administration box.

Choose the Course Type from the drop down menu.

Choose the Primary Delivery Method from the drop down menu.

Enter the minimum and maximum number of students.

Enter the Duration time as full hours/days and partial hours/days (i.e. X.0)

Use the drop down menu to indicate whether the Cost Unit (Duration time) is in Hours or Days.

Use the drop down menu to indicate the frequency of the Course Offering.

Prereqs. Goals Page

This page is optional. If you require a prerequisite, use the lookup glass to choose the course that is required. All other fields may be left blank.

Equipment Page

Use the lookup glass to select any equipment needed. Use the + icon to add additional equipment.

Catalog Page

This page is optional. If you choose to use it to set up a catalog, use the look up glass to choose a category and subcategory code.

Description Page

This page is also optional, used for the creation of a course catalog. Simply enter an effective date and narrative in the Description box as you would want it to appear in a catalog.

Click on the Save icon.

EXERCISE: SETTING UP THE COURSE TABLE

The following exercise is designed to solidify and enhance your understanding and use of the Course Table.

Go to **Setup HRMS>Product Related>Enterprise Learning>Courses.**

Click on the Add A New Value hyperlink. In the Course code field, enter a 6 digit code. The naming convention is the same as used for Facilities. The first 3 digits represent the first 3 digits of the campus which "owns" the course, the last 3 digits just increment by one based on the last course number assigned for that department/agency. Click on the "Add" button when you have finished entering the course code. For Higher Ed, refer to the course naming convention sheet. See addendum A.

1. The first tab with data to fill out is called the Course Profile. Here you define characteristics about the course. Note that fields marked with an asterisk (*) are required. Fill in the following fields:

- **Title:** enter the Course Title.
- **Short Title:** enter an abbreviated course title.
- **Course Status:** select Active from the drop down list. Other options are proposed and inactive.
- **Creation Date**: enter the date you create the course.
- **Revision Date:** leave blank for now. If you go into the Course Table later to make changes, use this field to indicate the date that the changes are made.
- **Internal/External:** select Internal for courses administered internally (i.e. administered by the State or HE) or External, for courses administered outside (an example would be: you are creating a course that an employee is taking at a school external to work. You are not actually administering the class, but you want to be able to track your employee's progress with this EXTERNAL course).
- **Session Administration:** check this box- it must be activated in order to enable PS functionality behind the scenes that allows you to administer courses in an automated fashion. With **Session Administration** selected, you can create course sessions, set up waiting lists, enroll students in courses, and send out form letters. If it isn't marked, you won't be able to see course sessions associated with the course.
- **Multilingual Course:** check this box if the course is offered in multiple languages. NOTE: this box will not be enterable if the Session Administration check box has not been marked.
- **Course Type**: select the course type from the drop down list provided. The default value is Continuing Education. Additional values are: Comp Check, Functional, Mgmt Devel, Skill Dev, Supv Skill, and Technical. Use this field to categorize your courses.
- **Primary Delivery Method**: select the method used to present the training from the drop down list provided. The default value is Instructor. Additional values are: Audio, Computer, On the Job, Video and Workbook.
- **Instructor Comps/Accomps Required:** Select to define a set of instructor competencies and accomplishments for the course. This check box is unavailable for entry if the **Primary Delivery Method** value is other than *Instructor.* Checking this box

also enables you to enter the specific Competencies and/or Accomplishments on the subsequent Required Instr Comps/Accomps page.

- **Min/Max Students**: enter the minimum and maximum number of students that can enroll in the course, per session. Minimum number is not required, but you <u>MUST</u> enter a maximum number in order to use Session Administration.
- **Duration Time:** enter the duration of the course. If you enter info in this field, you will need to fill out the Cost Unit field as well.
- **Cost Unit:** if you entered a figure in the Duration field, select the Cost Unit that matches the duration: Day, Hour, Month, Week, Year
- **Course Units:** for an External course, enter the number of units earned upon completion of the course
- **Course Offering:** select a frequency to indicate how often the course is offered. Options are: Annually, As Required, Half Year, Monthly, Quarterly, Semester and Trimester. You may also leave the field blank.
- **School Code/School:** for Internal Courses, these fields are unavailable for entry. For External courses, search on School Code to see if it is set up. If not, enter the name of the school manually in the School field.

2. The Instructor Competencies and Accomplishments page is not being used. You may skip this page.

3. The Prereq's/Goals page allows you to define prerequisites for the course you are defining, identify competencies and accomplishments that a student would be granted upon completion of the course, and also define language skills that would be acquired by completing this course. Fill information in the following fields:

- **Prerequisite Courses:** if another course or courses are required before this course can be taken, define the prerequisites for the course here. Click on the magnifying glass icon to view courses to select from.
- **Target Competencies**: leave this field blank.
- **Target Accomplishments**: Identify any licenses or certificates that would be achieved by completion of this course. Click on the magnifying glass icon to view a list of available selections. You may add multiple rows of accomplishment data, if applicable.
- **Grant to EE after course:** if employee/student is to automatically receive the license or certificate upon completion of the course, check this box
- **Target Languages:** leave blank: not applicable to the State. This field is used when a foreign language course is offered, to track at what levels the student can speak, read and write the language at the completion of the course.
- Click on the Equipment tab to go to the next page.
- On this page you define the equipment needed in order to conduct the course. Examples might include whiteboard, flip charts, computers, books, etc.
  - a. Add as many rows of data as you need. Click the magnifying glass to see a list of values.
  - b. When you are finished adding equipment, click the Catalog tab to go to the next page.

4. The Catalog page defines how your courses appear and are sorted if you create a Catalog of your course offerings. Placing courses in a catalog is a way of organizing your training courses into a structure that helps you administer courses more efficiently, especially if your organization manages a large number of diverse courses. The following fields will appear:

- **Not in Catalog:** check this box if you don't want this course to appear in your course catalog. If you select this box, the subsequent fields of Category Code and Subcategory code will not be enterable.
- **Category Code:** defines training subjects. Click on the magnifying glass to see the available values, and select the appropriate value for your course
- **Subcategory Code:** allows for more specific definition of the subject matter. Click on the magnifying glass to the see available values, and select the appropriate code for your course.
- If you want to assign this course to more than one Category/Subcategory, just click on the "**+**" sign, and the system will add paired rows: one for Category, the other for Subcategory
- When you are finished assigning the Category/Subcategory codes, click on the Description tab to go to the next page

5. The Description page allows you to define more detailed information about the course. You enter information about the course Content, Audience, Agenda and any other General information you want to provide about the course. The following fields display:

   a. Type: Select a description type for the type of information to add. Options are *Agenda, Contents, Audience,* and *General.*

   b. Effective Date and Description: Enter an **Effective Date** and a **Description** for the selected description type. **Note.** The **Effective Date** on this page applies only to the **Description,** not to the entire course definition. Additionally, you may have multiple effective dates for each description type. For example, you may initially enter a description type of Contents with an effective date of 01/01/2004. Then on May 1st, you decide to modify the course contents, so you insert a row in the Effective Date field, and enter the new description information.

   c. To add multiple description types, click on the "+ sign across from the Type field. Then repeat the previous step.

   d. Click on the "save" button at the bottom left of the page to save the record.

COURSE SESSION PLANNER

Use this table to plan new course sessions. You may check availability of training rooms and instructors BEFORE you actually set up the course session. The prerequisite for using this page is that the Course Table for the course session you wish to plan must already exist. When you click the Course Session Setup hyperlink, this will take you directly to the Course Session Table and copy the data from the Course Session Planner page. Complete the Course Session Table pages and when you save, the system will bring you back to the Course Session Planner page. You may then begin planning for another Course Session.

Go to **Setup HRMS>Product Related>Enterprise Learning>Course Session Planner.**

Course Session Planner Page

EXERCISE: USING THE COURSE SESSION PLANNER

The following exercise is designed to solidify and enhance your understanding and use of the Course Session Planner.

Go to **Setup HRMS>Product Related>Enterprise Learning>Course Session Planner**.

Enter the Course Code for which you wish to plan a session. Search on Course Code, Description, Internal/External, and Course Type. If you don't know the Course Code, click on the magnifying glass to look it up and fill in the information required for the search. This sub search will look at Category Code, Sub-Category Code, or Course Code. You may populate values into these fields to narrow your search, or just click the search button to see a list of all courses. Select the course code you want, and click the search button: this will take you to the Course Session Planner page.

1. Course Code, Description and Duration will default based on the Course Code you have selected.
2. Populate the following fields:
   a. **Start/End Dates:** enter Start and End Dates for the Course session you are planning. When you have filled in this data, the next 2 fields to populate will be created.
   b. **Start/End Times**: fields are created once you populate the Start/End dates field. Enter Start and End times for the Course session you are planning.
   c. **Facility:** select Facility for Course session you are planning by clicking the search icon for a list of facilities. After selecting the Facility, the Room Code field becomes available for data entry
   d. **Room Code:** select Room Code for Course session you are planning by clicking the search icon for a list of rooms associated with the Facility you have selected.
   e. **Training Room Booked Time**: If the Facility code you have entered is already booked for the date and time you require, that information will appear under the group box Training Room Booked Time. You may choose to change your selection of Facility and/or dates and times, based on this info.
   f. Select **Instructor ID** for Course session you are planning by clicking the search icon for a list of instructors qualified to teach this course.
   g. **Instructor Code:** select Instructor ID for Course session you are planning by clicking the search icon for a list of instructors qualified to teach this course.
   h. **Instructor Booked Time:** If the Instructor ID you have entered is already booked for the date and time you require, that information will appear under the group box Instructor Booked Time. You may choose to change your selected Instructor and/or dates and times, based on this info. If nothing appears after you enter the Instructor ID, you may presume that the Instructor is available for the date and times you specified.
   i. **Course Session Setup Hyperlink:** Click on Course Session Setup hyperlink to continue with the Setup of a new Course Session. **Note:** if either Facility Code or Instructor ID selected appears in their respective "booked" sections on the page, the hyperlink under Course Session Setup becomes inactive.

COURSE SESSION TABLE

This table will set up sessions or courses you administer internally. Enter specific information on a session, including dates, times, location, and costs. You can also track information like available equipment, instructors, and services to be outsourced to Vendors. When you change the start or end date here, the system automatically updates the student training records. It updates info for students on wait lists and also for those enrolled. If you use the Course Session Planner page prior to accessing the Course Session Table, the fields you populated on the Course Session Planner page will be dynamically populated on the corresponding fields in the Course Session Table.

Go to **Setup HRMS>Product Related>Enterprise Learning>Course Sessions**.

Course Session Profile Page

Location Instructor Page

Home | Worklist | MultiChannel Console | Add to Favorite

New Window | Customize P

| Course Session Profile | Location, Instructor | Equipment | Expense |

| | | | |

Course: SCS001 HR Orientation   Course Status: Active

Session #: 2004   Session Status: Active

Training Location   Find | View All   First ◄ 1 of 1 ► Last

Start/End Dates: 08/01/2004   06/30/2005   Start/End Times: 8:30AM   10:30AM   ➕ ➖

Duration: 2.0   Duration Unit: Hour

Facility: SCS015 🔍 Haverty Hall   Vendor ID: Training Facility Address

Select free Training Room

Room Code: Maximum Nbr of Students:

Building:

Floor #:

Instructor   Find | View All   First ◄ 1 of 1 ► Last

Vendor   Instructor ID   Name

🔍   Select free Instructor   ➕ ➖

Equipment Page

Expense Page

This page is optional. If you wish to track expenses, use the lookup glass to choose the expense type. Click on the + icon to add additional expense types.

Click on the Save icon.

EXERCISE: SETTING UP A COURSE SESSION

This exercise is a continuation of the exercise begun using the Course Session Planner page. It is designed to solidify and enhance your understanding and use of the Course Session Table.

Go to **Setup HRMS>Product Related>Enterprise Learning>Course Sessions.**

1. Course Session Profile page is the first in a series of chained pages of the Course Session Table. When you use the Course Session Planner page before navigating here, the following fields will be automatically populated based on what was entered in the Course Session Planner for this Session:

      a. Session Status
      b. Session Administration (check box marked)
      c. Start/End Dates
      d. Start/End Times
      e. Duration
      f. Duration Unit
      g. Minimum Students/Session
      h. Maximum Students/Session

This information may be overridden, if necessary.

2. Enter Vendor ID or perform lookup to select from list of available vendors, if applicable.

3. Click on the **Location, Instructor** tab to move to the next page.   The information in the **Training Location** area of the page is dynamically populated based on what was recorded in the same fields on the Course Session Profile page.   If changes need to be made to Session Status, Start/End dates, Start/End times, Duration or Duration hour, the changes should be made on the Course Profile page, not here; changes made on the Course Profile page will update the Location, Instructor page, but not vice versa.

4. If you need to change the location of the course session, click on the magnifying glass next to the Facility field, and search for another facility. To see the address information for the Facility you have selected, click on the Training Facility Address hyperlink.

5. After you have selected another facility, click on the Select Free Training Room hyperlink. The Training Room Availability page will appear, and a list of available rooms will be displayed. To select a room, click on the box next to the room of your choice. Then click the "ok" button at the bottom left of the page. This will bring you back to the Location, Instructor page. At this point, you will see that the following fields have been populated, based on your choice: Room Code, Maximum Nbr of Students, Building, and Floor #.
In the Instructor group box indicate who is going to teach the class, if known.

      a.   If the course session needs to be tied to a specific Vendor, click on the magnifying glass next to the Vendor field and select the appropriate Vendor.

b. If the class is to be taught by a specific instructor, click on the <u>Select Free Instructor</u> hyperlink to see a list of free instructors who are qualified to teach the class. Remember, on the Instructor Table you must specify what courses an instructor is qualified to teach. If you don't, the Instructor won't show up as a viable selection when you click on the Select Free Instructor on the Course Session Location, Instructor page.

c. The Instructor Name field may be manually populated WITHOUT selecting an Instructor ID, if you choose. Make sure the name is entered in the standard PeopleSoft format. Example: Henderson, Harry.

4. Click on the Equipment tab at the top of the page to move to the next page. The Start Date, Facility, and Room code fields will be dynamically populated, based on the selections you have made on the previous pages.

5. To view Equipment available at the Training Facility you have selected, click on the Training Facility Equipment hyperlink.

6. **Fixed Equipment/Materials:** if equipment and/or materials have been assigned at the facility ROOM level, the available equipment will dynamically populate here. This area defaults based on equipment tied to the specific ROOM you have selected at the Facility.

7. **Session Equipment Materials:** this information is dynamically populated based on the Equipment and Materials you selected as necessary on the Course Table. You may add more equipment here and/or delete equipment that was populated.

8. Click on the Expense tab at the top of the page to go to the final page of the Course Session table. This page is where you will define specific expenses that might be tied to this course Session. Examples are mileage, books, meals etc. Click on the magnifying glass next to the Expense field to see a list of defined values. You may add as many values as you need by clicking on the "+" at the end of each row of data. Similarly, to delete values, click on the "-" at the end of the row you wish to delete.

9. When you have finished adding your Expenses, save the Session information by clicking on the "save" button at the bottom left of the page.

TRAINING PROGRAM TABLE

The Training Program Table is used to group courses into logical progressions. You may also associate a Training Program to a specific Job Code. You will assign specific courses to the training program, and identify whether a course is required. The system sorts courses by course code. If you want the codes that you select in the Course Code field to appear in a different order, enter sequence numbers in the sequence # field to define the order in which students should take the courses.

Go to **Setup HRMS>Product Related>Enterprise Learning>Program Information.**

Training Program Table

EXERCISE: SETTING UP A TRAINING PROGRAM

The following exercise is designed to solidify and enhance your understanding and use of the Training Program Table.

Go to **Set Up HRMS>Product Related>Enterprise Learning>Program Information.**

1. Populate the Program Code field with a six digit code to uniquely identify this training program. Higher Ed will use Addendum A to assign Training Program code.   After you have populated the field, click the Add a New Value hyperlink.
   a. To look up existing Training Programs, click on the "search button", and select the appropriate value.

2. The Training Program page will appear. Enter the appropriate data:

   a. **Program Status:** active is the default value. Other values are Inactive (if the program is no longer offered, for example) and Proposed.

   b. **Description**: enter a descriptive title for this training program.

   c. **Short Title:** enter an abbreviated title for this training program.

   d. **Creation Date:** enter the date the training program is created. The default is the current (system) date, which you may change.

   e. **Revision Date:** if you make changes to the training program after you initially set it up, enter the date that the changes were made in this field.

   f. **Business Unit:** select the Business unit you wish to associate with this training program. This would normally be the creating Agency's business unit.

   g. **Owning Dept ID:** select the department that is responsible for maintaining Training Program within the Business Unit.

   h. **Comments:** enter any text comment about this training program

   i. **Training Program Group Box**: list of courses belonging to this training program. Populate information in the following fields:

   j. **Sequence:** Number the courses in the order in which you want them to be sorted for this training program. If one course should be taken before another, this should be reflected in the way you sequence the courses. Add a row for each additional course in this training program

   k. **Course Code**: input the course code or select the course code using the lookup functionality.

   l. **Required:** Check this box if the Course is Mandatory for this Training Program

3. After you have completed all data entry for this Training Program, click on the "save" button at the bottom left of the page to save this record.

USAGE TABLES

The following pages will be used to administer your training courses and track student data.

- Enroll Individually
- Create/Update Course Wait List
- Course Auto Enrollment
- Express Rescheduling
- Individual Training Evaluation
- Course Session Evaluations
- Student Training
- Tuition Reimbursement
- Student Course Enrollment
- Competencies
- Education
- Languages
- Licenses/Certifications
- Memberships
- Test Results

ENROLL INDIVIDUALLY

Use this page to enroll students individually or to make changes to the course roster and/or student status. Indicate here the reason the student is taking the class and do a prerequisite check. To change student status to either wait list or attending, use the Student Training page. Click on the Transfer-Course Session Setup hyperlink, and this will take you to the Course Session Table, in case you need to make any corresponding changes there.

Go to **Enterprise Learning>Student Enrollment>Enroll Individually.**

Enroll Individually Page

Search for your course by entering at least the first three digits of the course session number (i.e. SCS or BSC). Select the course.

The Course Session Enrollment page will appear.

Course Session Enrollment Page

EXERCISE: ENROLLING A STUDENT INTO A COURSE SESSION

The following exercise is designed to solidify and enhance your understanding and use of Course Session Enrollment functionality.

Go to **Enterprise Learning>Student Enrollment>Enroll Individually.**

1. The lookup page Find an Existing Value appears. Use any or a combination of the fields to locate the course and session you wish to enroll students into. The following fields are available: Course Code (lookup), Course Session Nbr, Description, Course Start Date, Training Facility (lookup) and Session Language (lookup). Select your course session from the results returned, which will take you to the Course Session Enrollment page. **Note**: The more fields you enter data in, the more narrow the search becomes. However, if you enter data into more than one field, and the data provided conflicts, no matches will be returned. **Note**: for Higher Education, the term Student should be equated with Employee.

2. The following fields will be auto populated, based on the course session you selected: Course, Session #, Start Date, Start Time, Facility, Language, Min Students, Max Students, # Enrolled, # Waiting.

3. Transfer-Course Session Setup hyperlink: if you need to see how the Course Session table for this particular Course session was set up, click on this hyperlink, and it will take you to the Course Session Table. You may make changes here if necessary, just remember to save. To get back to the Course Session Enrollment page, you may either hit the back arrow on your browser or cancel out of the Course Session Table and navigate back to the Course Session Enrollment page.

4. To enroll a student, fill in the fields as applicable:

    a. **EMPLID:** enter the EMPLID of the student you wish to enroll in this course session. If you do not know it, use the look up feature.

    b. **Enrollment/Attendance:** enter the enrollment status for this employee: default is enrolled.

    c. **Status Date:** enter the date associated with the Enrollment/Attendance status previously assigned.

    d. **Training Reason:** select a Training Reason from the drop down list available.

    e. **Prerequisites Met:** check this box if there are prerequisites to this course and the employee being enrolled has met them.

    f. **Letter Code:** enter applicable Letter Code, or use lookup.

    g. **Date Letter Printed**: field will be dynamically populated when the Letter process has been run. This DOES NOT indicated when the letter was sent to the employee, only when the letter process was generated.

    h. **Grade:** field will be dynamically populated when the Employee Training page has been updated to show the course Attendance status as Completed, and a grade has been assigned.

    i. **Business Unit:** the Business Unit the employee is assigned to will default here.

    j. **Department:** the Department to which the employee is assigned will default here.

    k. **Demand from Budget Training:** the fields in this group area will not be used at this time.

5. To enroll additional students in this course session, repeat steps 1-4. Click the "save" button at the bottom left of the page to save this record.

CREATE/UPDATE COURSE WAIT LIST

This page allows you to put employees and non employees on a waiting list for a course/session and designate their enrollment status. Placing students on wait lists is a good way to track course demand. It also allows you to utilize the Course Auto Enrollment feature. When you use the automatic enrollment process, the system will first enroll those students with "Sessn Wait" status (you must assign a session # in the session # field) in the particular session specified. If any places are still open, the system will then enroll any student with a "Crse Wait" status.

Go to **Enterprise Learning>Student Enrollment>Create/Update Course Wait List.**

Course Waiting List

EXERCISE: UTILIZING THE COURSE/SESSION WAITING LIST

The following exercise is designed to solidify and enhance your understanding and use of the Course Waiting List.

Go to **Enterprise Learning>Student Enrollment>Create/Update Course Wait List.**

1. Look up the Course Number for which you wish to wait list students, and select it. Use the Course Number you created in the Course Session exercise.

2. In the Attendance group box, fill out the following fields:

        a. **EMPLID:** input the EMPLID you wish to wait list for this course. If you do not know it, use the lookup feature provided adjacent to the field.

        b. **Name**: field will populate based on the EMPLID selected.

        c. **Attendance:** select Sessn Wait to wait list for a specific session; Select Crse Wait to wait list only for the course itself. Understand that students with a Sessn Wait status take priority over those who are wait listed with a Crse Wait status. **Note**: even though there are many different Attendance Statuses displayed, the only valid options on this page are Crse Wait and Sessn Wait. If you chose any others, you will get an error message.

- **Waitlist Date:** enter the date this student was added to the wait list.
- **Session #:** if you selected an Attendance status of "Sessn Wait', you must assign the Session # here.
- **Status Date:** defaults to current system date

3. Repeat the steps out lined in #2 above twice more. For two students, assign Attendance status of "Sessn Wait"; for one student, assign Attendance status of "Crse Wait. You should have a total of 3 students wait listed when you are finished.

4. Save the record when you are finished by clicking on the save button at the bottom left of the page.

5. Gp back to the Course Session Enrollment page and see if the students you wait listed appear here. Notice that the students you assigned with an Attendance status of "sessn wait" now appear on the Course Session Enrollment page, but the student with the status of "Crse Wait" did not.

COURSE SESSION AUTO ENROLLMENT

Once you have established wait lists, you can use Course Session Auto Enrollment, which will also ensure that students get enrolled in the proper order. Enter the session # in the appropriate field, and the system handles the rest. It will change their previous status (as set on the Course Waiting List) from either "Sessn Wait" or "Crse Wait" to Enrolled and will remove them off the wait list.

Go to **Enterprise Learning>Course Session Auto Enrollment.**

Course Session Auto Enrollment Page

EXERCISE: UTILIZING COURSE SESSIONS AUTO ENROLLMENT

The following exercise is designed to solidify and enhance your understanding and use of the Course Auto Enrollment functionality.

Note: This exercise is built on the previous exercise of assigning student to a Waiting List.

Go to **Enterprise Learning>Student Enrollment>Course Sessions Auto Enrollment.**

Enter the Course Code for which you wish to enroll students. Choose the Course Code you set up earlier in this training session.   If you don't recall the Course Code, use the lookup/search criteria available to find it and then select it. This will bring you to the Course Auto Enrollment page.

1. Notice that the students you put on the Wait List for this course appear, and their statuses reflect the same status as what was input on the Course Waiting List page. Input the Session # you created in earlier exercises associated with this Course code and tab out of the field.

2. When you select the session number, you will receive the following message: "--- spaces are available. This is the number of open slots in this training session available to be filled through auto enrollment. Students will be taken from the waiting list in priority order to fill the available spaces." Click ok; you will get another similar message- this one specific to status of Session Wait. Click ok; you will get ANOTHER message— this one specific to status of Course Wait. Click ok; notice that the status now of your two employees who were waitlisted is now changed to "enrolled".

3. Save the record to enroll these students. If you DO NOT save, when you exit out of the page, the student status will revert back to what it was on the Course Waiting List page.

4. Go back to the Course Waiting List page. Input the Course code for which you just enrolled your students. Notice that they are no longer on the Wait list for this course.

5. Now go to the Course Session Enrollment page. Input the Course and Session for which you just enrolled your students: notice that they now appear on the Course Session Enrollment page, with an Enrollment/Attendance status of Enrolled.

RESCHEDULE BETWEEN SESSIONS

Use this page to review and update information on all students who are enrolled in active sessions of a particular course or are on course or session waiting lists. You can move students from one session to another, change their enrollment status, and designate the kind of form letter they should receive. You can't delete or add enrollments here; this page can only be used to make changes to students who have a status of Enrolled, Crse Wait, or Sessn Wait. Any other changes must be made directly to the Course Session Enrollment page.

Go to **Enterprise Learning>Student Enrollment>Reschedule Between Session**.

Express Rescheduling Page

EXERCISE: USING THE RESCHEDULING BETWEEN SESSIONS FUNCTION

The following exercise is designed to solidify and enhance your understanding and use of the Express Rescheduling functionality.

Note: This exercise is built on the previous exercises of assigning students to a Waiting List and using the Auto Enrollment function.

Go to **Enterprise Learning>Student Enrollment>Rescheduling Between Sessions.**

1. Go back to the Course Wait List (Enterprise Learning>Student Enrollment>Create/Update Wait List). Input the Course # you created, and add two students to the waiting list, one with a status of Crse Wait and the other with a status of Sessn Wait (make sure to assign the session #). Save the record.

2. Go to Express Rescheduling (see navigation path above). You should see those employees who have an enrolled status (from previous exercises) and also the two you just added with Crse Wait and Sessn Wait statuses.

3. Change the employee with the Sessn Wait Status to Enrolled (notice that the letter code automatically changes) and the employee with the Crse Wait status to Sessn Wait (notice the letter code changes here too). Save the record by clicking on the "save" button at the bottom left of the page.

4. Go to Course Session Enrollment page to view the results of the changes you made. Also, navigate back to the Course Waiting List page: how many people do you see listed there now? What activity would remove someone from this list?

COMPLETING OR CANCELING SESSIONS

Once a course session has taken place-or when you cancel a session-you need to indicate that the session is completed (closed) or cancelled.

Go to **Setup HRMS>Product Related>Enterprise Learning>Course Sessions.**

Steps to Complete or Cancel a Course Session

1. Select the course from the Course Session Table. Go to the Course Session Table— Course Profile page, and select the session from the list of active sessions.
2. Change the Session Status to Complete; if the session has finished, or Cancelled, to cancel it.
3. If you update the session status to Complete, the system updates:
   a. Student Training Profiles: the profiles show that the students enrolled in this session have completed this course.
   b. Student Competency Profiles: the system assigns the competencies and accomplishments that are defined on the Course Table- Prereqs, Goals page.

4. If you set the session status to Cancel, the system updates the student data automatically (Student Training) and inserts the letter code of CAN (cancellation) on the Course Session Table so that you can generate letters notifying students of the session cancellation. You create the letter codes on the Standard Letter Table page. Once you've set the Session status to Complete or Cancelled, you can no longer use the course session during enrollment and rescheduling (basically, the Course Session Enrollment page for the Course session you just closed or cancelled is no longer accessible). If any students are on a waiting list for a cancelled or completed session, update the waiting list so that you can enroll them in other sessions.

EFFECTS OF SESSION ENROLLMENT STATUS CHANGES

Below is a table showing how an employee status progresses through the system once a course session is completed or cancelled. There is also an example of how an employee status progresses if the course session is cancelled and then activated again.

Original Enrollment Status	Enrollment Status if Course Session is Taken from Active to Completed	Enrollment Status if Course Session is taken from Active To Cancelled	Enrollment Status if Course Session is taken from Active to Cancelled then Back to Active.
Approved	Approved	Approved	Approved
Attending	Attending	Attending	Attending
Authorized	Authorized	Authorized	Authorized
Cancel	Cancel	Cancelled	Cancel
Cancelled	Cancelled	Cancelled	Blank
Completed	Completed	Cancelled	Enrolled
Course Waitlisted	Can't Use	Can't Use	Can't Use
Dropped	Dropped	Dropped	Dropped
Enrolled	Completed	Cancelled	Enrolled
Incomplete	Incomplete	Incomplete	Incomplete
Need CrPlan	Need CrPlan	Need CrPlan	Need CrPlan
Need TrPrm	Need TrPrm	Need TrPrm	Need TrPrm
No Show	No Show	No Show	No Show
Request	Request	Request	Request
Sessn Waitlist	Sessn Waitlist	Cancelled	Cancelled

EXERCISE: COMPLETING (CLOSING) A SESSION

The following exercise is designed to illustrate how to close/complete/cancel a Course Session.

Go to **Setup HRMS>Product Related>Enterprise Learning>Course Sessions.**

Input the appropriate Course Code and Session number (use the Course and session # you have set up in previous exercises). You may use the lookup function on the Course Code field if needed.

1. Change the status of the Course Session to Completed (this closes the course session).

        a. To cancel a course session, change the status to Cancel.

        b. To reschedule a course session, leave the status as Active, but click on the Reschedule check box, and change the start and end dates of the Course Session.

2. Save the record.

3. Go to the Enterprise Learning>Student Enrollment>Enroll in Course page to see the effect of your change at the student level. If you wish to assign a grade for the course to the student, this is where it would be done. Click on the lookup glass next to the field "Grade" and choose a grade. Hit Save.

4. Go to Course Waiting List: if you set the Course Session to Completed and a student was wait listed for the session you just closed/completed, you will need to either change the Attendance Status to Crse Wait OR change the Session # (prerequisite to this would be that you have created another Course Session for this course).

5. Note: You can also navigate to the Course Session table from the Course Session Enrollment page. Navigation is Enterprise Learning>Student Enrollment>Course Sessions. If you are in this page and need to close a course session, click on the Transfer-Course Session Setup hyperlink found at the top right ¾ of the page, underneath the Prerequisite Checking push button. By clicking the hyperlink, you will be taken to the Course Session Table associated with the Course Session Enrollment page you were in. Change the status of the Course Session to Completed and save the record.

EVALUATING COURSE SESSIONS

There are two different methods for collecting student feedback about course sessions, the Course Session Evaluation page or the Individual Student Evaluation pages. Which one to use is a matter of individual preference.

Use the Course Sessions Evaluations page to track course ratings for facilities, instructors, course content, etc. You may record student feedback on course sessions so that you know what areas need improvement. The system will calculate session statistics, like # of responses per rating, average ratings, and overall average for the session. Note: only those Course Sessions that have a Completed status will appear as options for Course Session Evaluations.

Go to **Enterprise Learning>Result Tracking>Evaluate Course Session.**

Course Sessions Evaluations Page

EXERCISE: USING COURSE SESSION EVALUATIONS

The following exercise is designed to illustrate how to utilize the Course Session Evaluations functionality.

Go to **Enterprise Learning>Result Tracking>Evaluate Course Sessions.**

1. Enter the Course Code and the Session number for which you want to enter evaluation information. You may use the lookup function next to the Course Code field if necessary.

2. The Course Session Evaluations page will display. The page is designed so that you can input multiple rows of ratings data, such that feedback from all class participants can be reflected. The following fields will dynamically display, based on the Course Code and Session # you selected: Course (with description) Session #, Start Date, Facility, and Language

3. Ratings area: in this area you choose what types of information you wish to rate. The available options are:
    a. Content
    b. Facility
    b. Instructors
    c. Materials
    d. Presentation

4. For this exercise, choose the areas of Content, Facility, and Presentation as the areas of evaluation. Add rows for each of the 3 ratings areas. Use the "+" at the far right of the row to continue adding rows.

5. Ratings: use this group box to enter students' evaluations of the areas specified in the Rating Area. Add a row for each rating level received: Excellent, Good, Fair, Poor (note: only add rating level rows for ratings received. For example, if no students rated Content as Poor, you would not add or use a rating level of Poor). For each rating level, input the total number of students who rated the area at that level. For this exercise, assume a total of 10 students rated this Course Session, in each of the 3 ratings areas defined.
    a. Ratings Area of Content: assign 4 Excellent, 3 Good, 2 Fair and 1 Poor
    b. Ratings Area of Facility: assign 5 Excellent, 4 Good and 1 Fair
    c. Ratings Area of Presentation: assign 3 Excellent, 5 Good and 2 Fair

6. Save the record (click "save" button at bottom left of page). Notice that Average Rating and Session Average fields now display on either side of the Total Count field (which should equal 10 for each area of evaluation).

7. Average rating is calculated for each Ratings area. This is done by taking the total Count for each rating level and multiplying it by the rating points for that level. Add those totals together and divide by the total count of students evaluating. The Average Rating for the Ratings Area of Content would be calculated like this:

    a. Excellent= 4 (count) x 1 (rating points) = 4
    b. Good=   3 (count) x 2 (rating points) = 6
    c. Fair=   2 (count) x 3 (rating points) = 6
    d. Poor=   1 (count) x 4 (rating points) = 4

                    Total = 20 (4+6+6+4) / 10 (total number of students who evaluated the session) = 2.0 Average Rating level.

8. Session Average is the overall session rating. This is calculated by taking the Average Rating for each rating area, adding them together and dividing that total by the total number of ratings areas evaluated. In our example, we have 3 ratings areas, so we take the Average Rating for each Rating Area and divide by 3 (2.0 + 1.6 + 1.9 = 1.83).

INDIVIDUAL TRAINING EVALUATION

This is a second way to capture student feedback about a course. The Individual Training Evaluation page captures much of the same data the Course Session Evaluation page does, but is a little more detailed.

Go to Enterprise Learning>Results Tracking>Individual Training Evaluation Page.

Individual Training Evaluation Page

Enter the name of the student completing the evaluation. Click on "Search." The Course Information Page will open.

Course Information Page

The course "demographic" information would be entered. The student would indicate whether or not the Stated Objective was accomplished and how well the subject matter was covered.

Evaluation Data Page

The student would respond to the following topics:

Organization of Subject Matter	Select *Poorly organized, Adequate,* or *Well Organized.*
Suitability of Instr Materials (suitability of instructor's materials)	Select *Poorly suited, Adequate,* or *Well Suited.*
Level of Difficulty	Select *Appropriate, Too Advanced,* or *Too Elementary.*
Length of Course	Select *Appropriate, Too Long,* or *Too Short.*
Amt of Outside or Evening Work (amount of outside or evening work)	Select *Appropriate, Insufficient,* or *Too Much.*
Effectiveness of Instructors	Select *Excellent, Good,* or *Poor.*
Appl of Subject Matter to Work (applicability of subject matter to work)	Select *Insignificant, Adequate,* or *Significant.*
Facilities	Select *Excellent, Good,* or *Poor.*
Recommendations to Colleagues	Select *Highly Recommend* or *Not Recommend.*
Meet Career Development Plans	Select *No, Yes,* or *Not Applicable.*

Comments Page

FREE-FORM NARRATIVE BOXES CAPTURE INFORMATION ABOUT STRONG POINTS, WEAK POINTS AND OTHER ADDITIONAL COMMENTS.

LETTER QUERIES

Because each campus may have its own set of standardized letters, it has been decided that the query tool will be used to extract the data required, and mail merge used to pull the data into the specific campus standardized letters. The following queries have been created:

- ND_TA_MAIL_MERGE: includes all enrollment statuses
- ND_TA_MAIL_MERGE1: includes all enrollment statuses with e-mail addresses
- ND_TA_MAIL_MERGE2: includes all enrollment statuses with Department data.

Note that when you run these queries, the results that you see will be limited to your security access. For example, a person who has security associated with NDSU would not see the same set of results as someone who has security for UND.

EXERCISE: RUNNING ENROLLMENT STATUS QUERIES

The following exercise is designed to illustrate how to run developed queries, and the subsequent steps to create enrollment status letters.

There are basically 3 different documents you will be working with:

- **Source Document**: this will be the results from the query you run and save as an EXCEL or CSV document. It has all the mailing addresses and names that you drop into the master document.
- **Master Document**: the template for the mail merge. Essentially it is the letter that you will drop the data into. Each Agency/Campus will be responsible for creating and using its own Master Document.
- **Individual Training Letter:** a combination of the Source Document and the Master Document: you will do a mail merge to join the Source Document and the Master Document to create the Individual Training Letter.

Go to **PeopleTools>Report Tools>Query>Query Viewer**.

1. Input Data in the following fields:
   a. Search by: Name, begins with: ND_TA_MAIL_MERGE (or ND_TA_MAIL_MERGE1, ND_TA_MAIL_MERGE2)
   b. Query Type: User
2. Click the Search button. When the search returns values:
3. Click on the Run hyperlink at the end of the TA_MAIL_MERGE row.
4. Input From and Thru dates. Recommend that you don't use any dates you have in the past. The queries are written with "between" dates which are inclusive of the from and through dates. Unless you are working on weekends, it is recommended that from and through dates reflect Monday-Friday dates.
5. Click the "View Results" button.
6. Save the results to your hard drive as either an EXCEL or CSV Text file.
7. Use the saved file as your Source Document, and "merge" it with your Master Document (template) to create your training letters.

INQUIRY PAGES

Peoplesoft delivers two pages where you can go to get summary information related to training: Student Training Summary and Course Session Summary. The first summarizes the training history of an employee, and the second summarizes enrollment information about a particular Course Session.

TRAINING SUMMARY

Go to **Enterprise Learning>Results Tracking>Review Training Summary.**

The Training Summary page shows you, on line, the training history of a particular student. Navigate to the page and input an EMPLID, or use the search criteria provided to locate the person you are looking for. The information provided includes:

- Session Information for each Course/Session: Course, Title, Session #, Start and End dates
- Status Information for each Course/Session: Status and grade

The information displayed here corresponds to the information provided in the delivered PeopleSoft report Student Training History.

Student Training Summary Page

Enter the EmplID or do a name search.

Student Training Summary

New Window | C

Student Training Summary

Peggy Torrance   **Person ID:**   0179736

Training Summary   Customize | Find | View All | First ◄ 1-11 of 1

Session	Status			
Course	**Title**	**Session #**	**Course Start Date**	**Course En**
SCS195	Super. Leadership & Delegation	0002	05/11/2006	05/11/2006
SCS194	Supervisor Meetings	0002	04/27/2006	04/27/2006
SCS190	Super. Counseling & Motivation	0002	03/02/2006	03/02/2006
SCS189	Super. Coaching	0002	02/16/2006	02/16/2006
SCS187	Super. Managing HR Info	0002	01/19/2006	01/19/2006
SCS186	Super. Communication	0001	01/05/2006	01/05/2006
SCS185	Super. Getting Organized	0001	12/01/2005	12/01/2005
SCS007	Policy Manual Acknowledgement	2006	07/01/2005	06/30/2006
SCS008	Annual Notification Policies	2006	07/01/2005	06/30/2006
SCS150	Connecting with Customers	0004	06/07/2005	06/07/2005
SCS128	Collegiate Mgment Institute I	2005	05/15/2005	05/20/2005

SESSION SUMMARY

Go to **Setup HRMS>Product Related>Enterprise Learning>Track Results>Review Session Summary.**

The Session Summary page provides information related to a specific course session. Go to the page and input the Course and Session you want to view. Use the search criteria provided to locate the Course/Session you require. The page displays the following information:

- **Course Information:** Course Code, Description, Session #, Start/End Dates, Course Session Status, Facility and Language
- **Session Information:** specific student data, including EMPLID, Name, Enrollment Status and Grade.

Review Session Summary Page

Enter the course code to conduct the search.

Course Session Summary Search Page

ENTERPRISE LEARNING REPORTS

Go to **Setup HRMS>Product Related> Enterprise Learning>Training Facilities.**

Following is a list and brief description of the delivered PeopleSoft Enterprise learning reports:

- **Equipment Checklist -** Equipment defined as necessary for a particular Course and Session
- **Statistics of Enrolled Students - :** Sorts by Company and Location code: provides info on which students attended or are enrolled in specific classes; subtotals by dept.
- **Student Training History:** - summary of training for a particular student/EMPLID
- **Training Facilities Schedules -** a list of training sessions taking place at a specific training facility within a specified time frame
- **Training Instructor Schedules** - the training schedule for a particular Instructor within a specified time frame
- **Training Programs** - training program tied to a specific student/EMPLID via association of Training Program to Job Code
- **Training Schedules** - : A list of course sessions scheduled during a specific time frame

Go to **Enterprise Learning>Course Reports.**

- **Attendance Status** – lists the attendance status of the students in a course
- **Course Category** – lists the course categories
- **Course Description** – lists the description of a course
- **Course Equipment –** lists the equipment needed for a course
- **Course Rating** – lists the evaluation rating for a course
- **Course Rating Template** – Provides the evaluation template to be filled out by the students enrolled for a course and session
- **Course Session Roster** – lists the course name, session number, session start date and all students enrolled in the course
- **Courses** – lists the courses offered
- **Course Vendors** – lists the vendors used for a course
- **Course Waiting List** – lists all students who are on the course or session wait list
- **Prerequisite Courses** – lists the prerequisite courses for a course
- **Licenses and Certifications** – lists licenses and certifications

ENTERPRISE LEARNING QUERIES

There are a number of queries available for users of this module. To see a complete list, navigate to Reporting Tools>Queries>Query Viewer and do a search by entering ND_TA.

ADDENDUM A: COURSE AND FACILITY NAMING CONVENTION

CONNECT ND — MAXIMUS PEOPLE Soft

State of North Dakota

Administer Training
Course and Facility Naming Convention

State and Higher Eduction System
NDxxxx

State of North Dakota System
SND xxx

North Dakota University System
USOxxx

Individual Agency
yyyxxx 'yyy' represents first three letters of Department ID

| NDSU **NDSxxx** | UND **UNDxxx** | BSC **BSCxxx** | DSU **DSUxxx** | LRSC **LRSxxx** | MSU Maysville **MAYxxx** | MSU Minot **MISxxx** | NDSCS **SCSxxx** | VCSU **VCSxxx** | WSC **WCSxxx** | MiBot **MIBxxx** |