PeopleSoft 8.9

Enterprise Learning
(Training Administration)

March 25, 2008

SPD
State Personnel Department

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Adding a Course Session

PeopleSoft's Training Administration has two components that are the foundation of all actions within the training process. **Courses** and **Sessions**, to some extent, are involved with every action within training administration.

Courses must be established first. A course may have several sessions active concurrently in PeopleSoft, but the sessions may not have identical details, such as time and facility. The date must be unique between sessions.

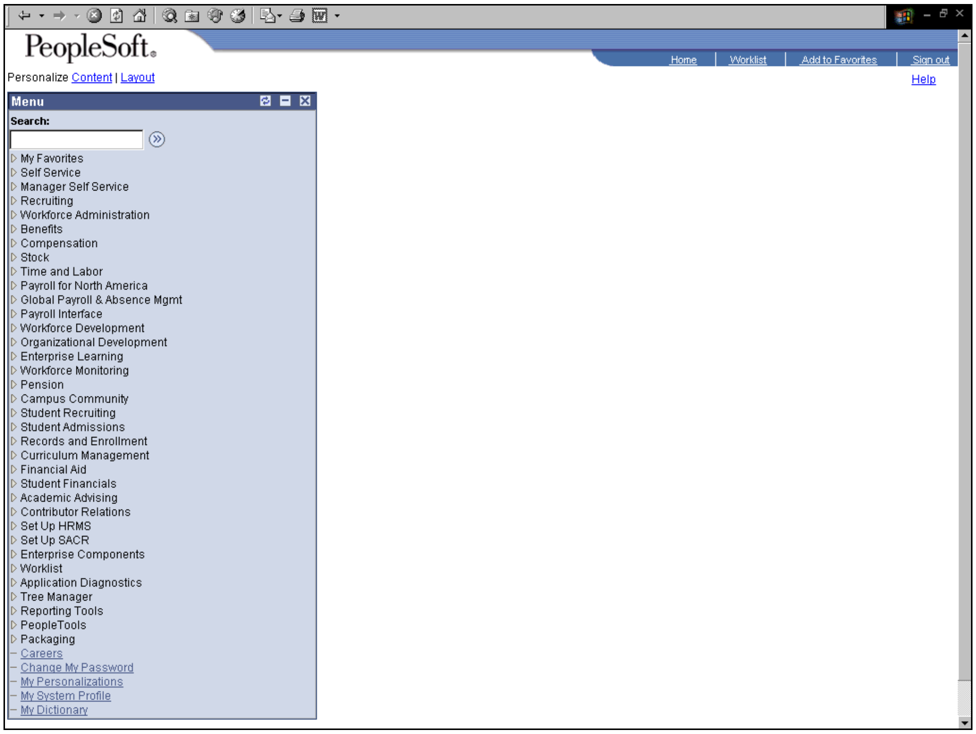
NOTE: To maintain consistency and avoid duplication, the State Personnel Department maintains the Course Table.

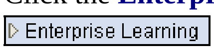
This topic will explain how to add a session for an existing course. A course session can be set up only if the Course Table has an active entry. If your course has not been entered on the Course Table, contact the State Peronnel Department's Training Division and submit the necessary information.

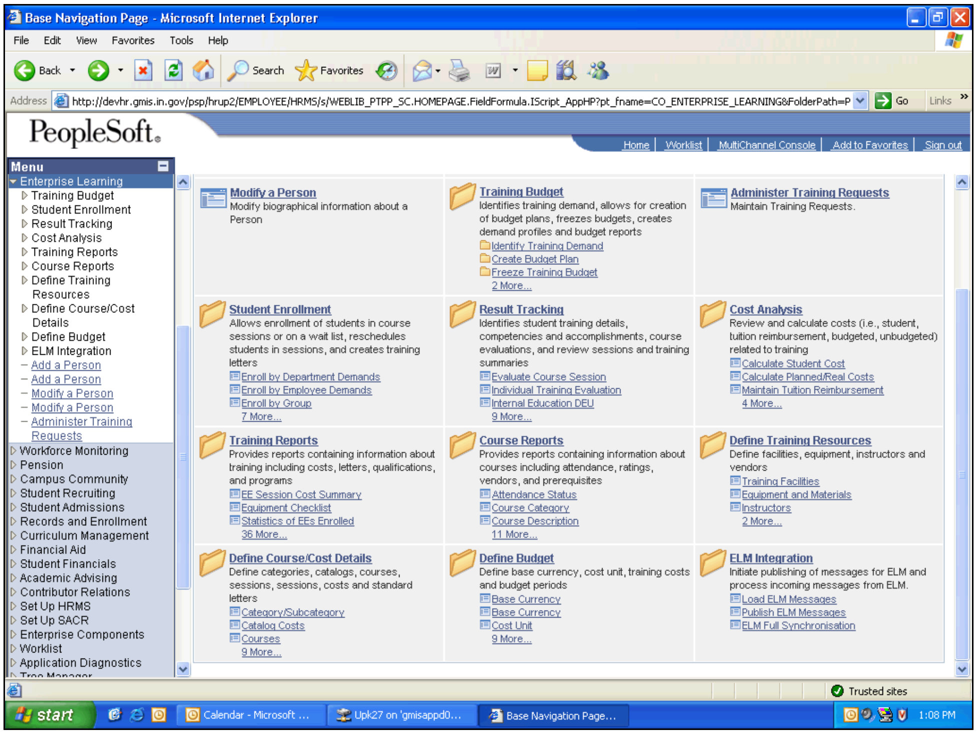
Procedure

In this topic, you will add a session for the Presentation Skills course (course code BSK001), and specify the session information in the PeopleSoft Human Resources application.

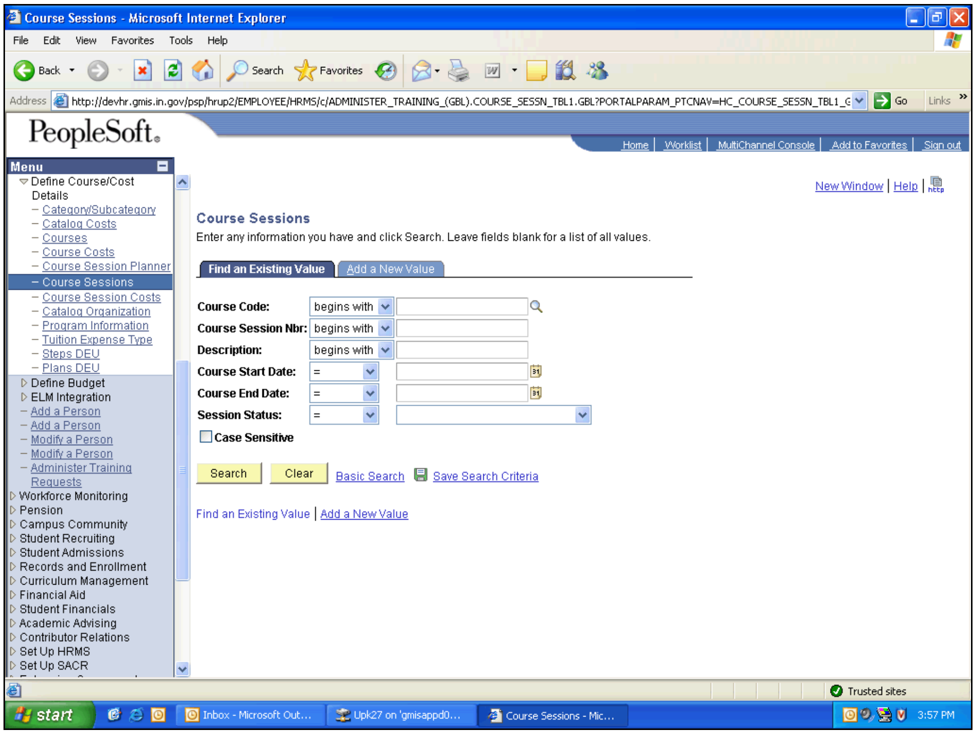
Procedure



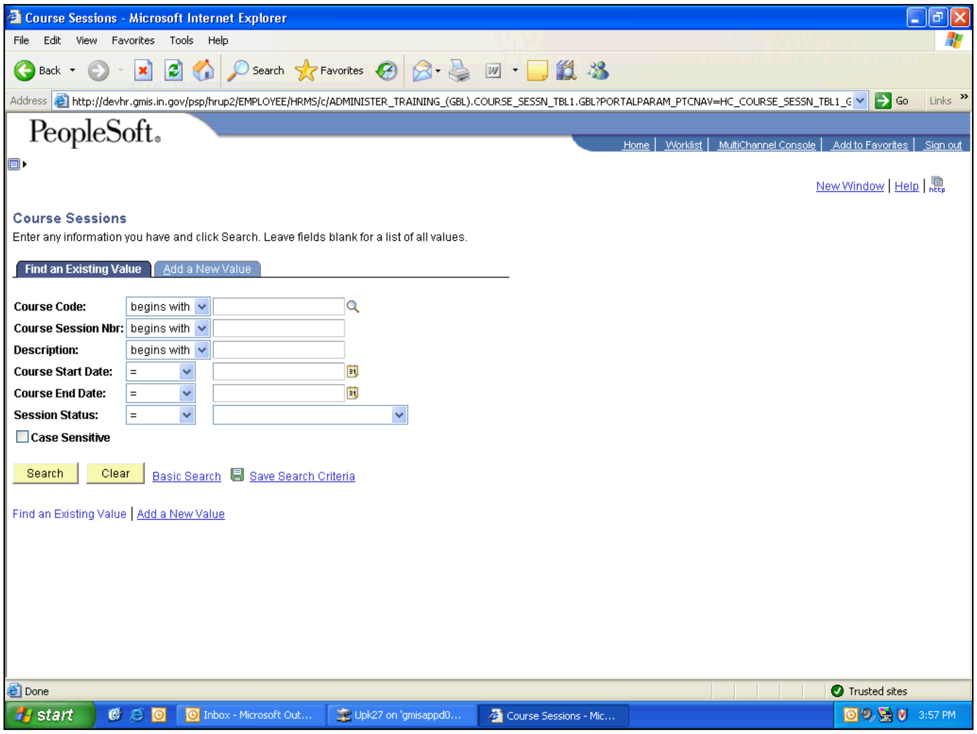
Step	Action
1.	Click the **Enterprise Learning** link. 



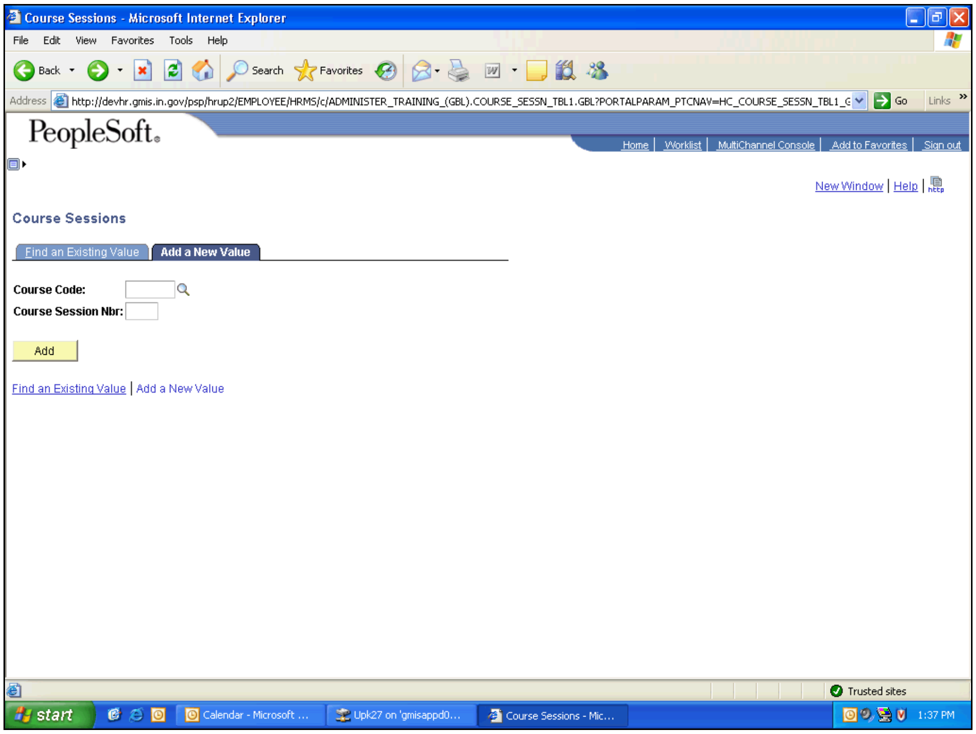
Step	Action
2.	Click the **Define Course/Cost Details** link. Define Course/Cost Details
3.	Click the **Course Sessions** link. Course Sessions

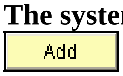


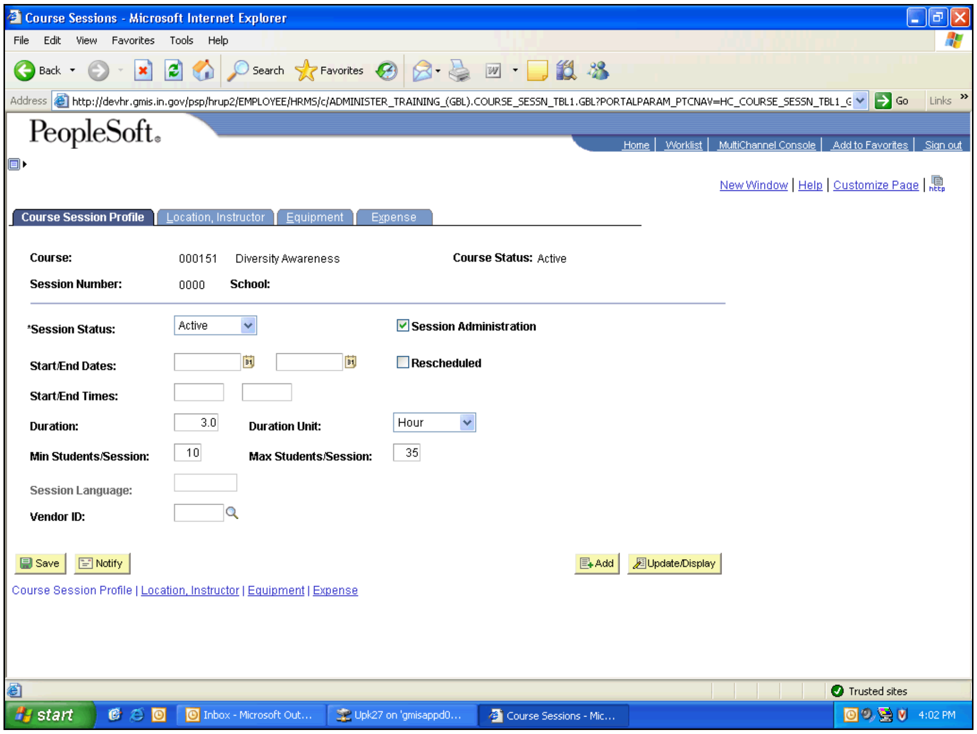
Step	Action
4.	Click the **Collapse Menu** button to display the full screen. 



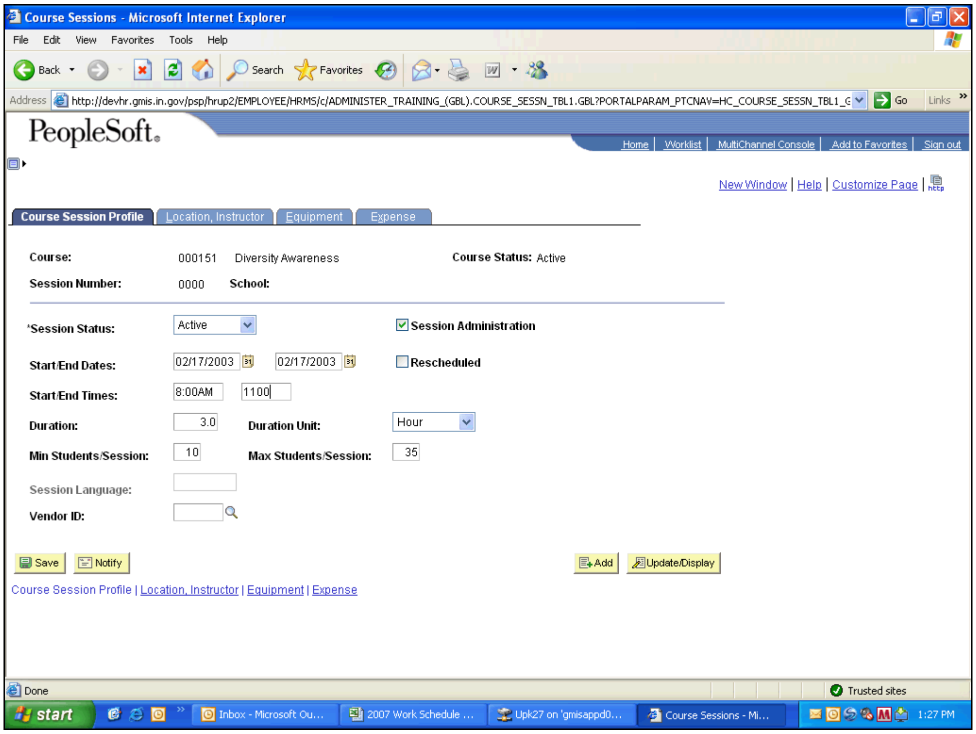
Step	Action
5.	Click the **Add a New Value** tab. Add a New Value



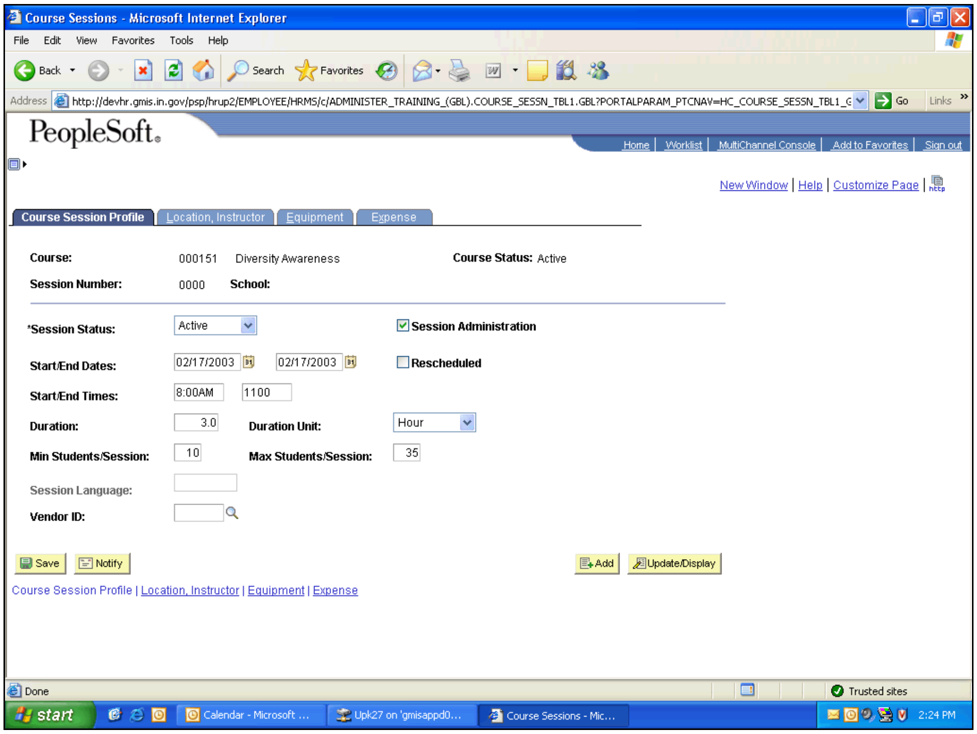
Step	Action
6.	Click in the **Course Code** field. 
7.	Enter the course code number into the **Course Code** field. **Note:** If you do not know the course code, click on the **Magnifying Glass (Alt+5)** button to look up the course codes.
8.	Click the **Add** button. **IMPORTANT: Leave the Course Session Number Blank.** **The system will assign a sequential number when you save the record.** 



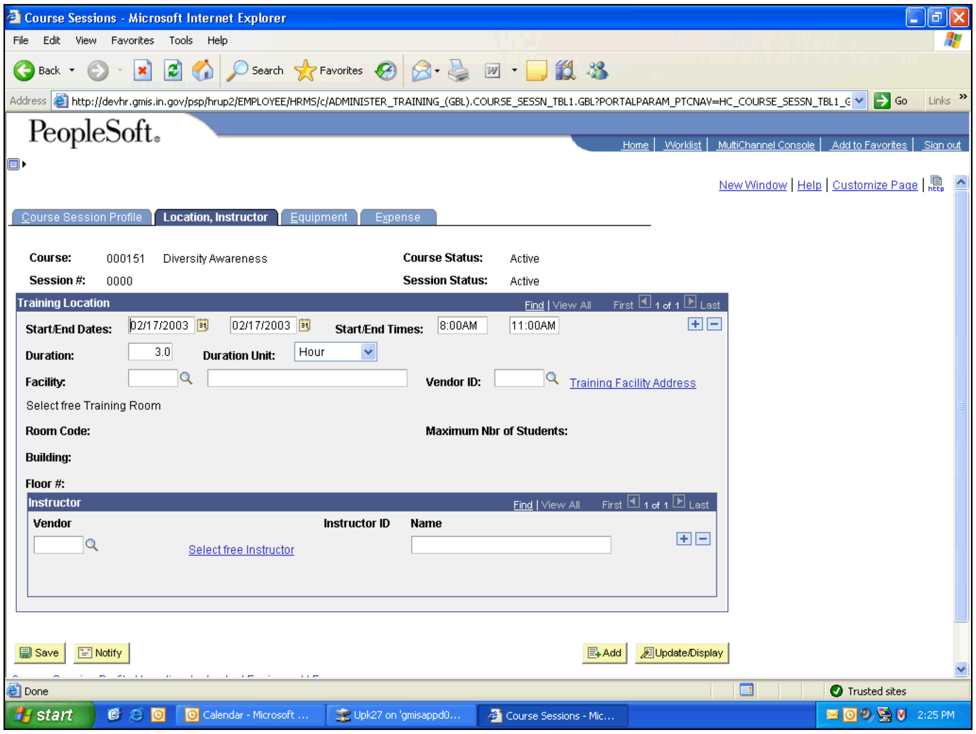
Step	Action
9.	Use the **Course Session Profile** tab to **enter**, **update**, or **view** a session status, date, time, capacity, duration, and vendor ID number. Specify the session status, such as **Active**, **Canceled**, or **Complete** in the **Session Status** field. In this instance, a new training session is being created so the default status of **Active** for the **Session Status** field will not change. Click in the **Start Date** field.
10.	Enter the course start date into the **Start Date** field.
11.	Press the **[Tab]** key.
12.	Enter the course end date into the **End Date** field.
13.	Click in the **Start Time** field.
14.	Enter the course start time into the **Start Time** field.
15.	Press the **[Tab]** key.
16.	Enter the course end time into the **End Time** field. **Note:** PeopleSoft will automatically format and default the time to an AM format. If the training ends in the PM, this will need to be entered correctly or changed after the default.



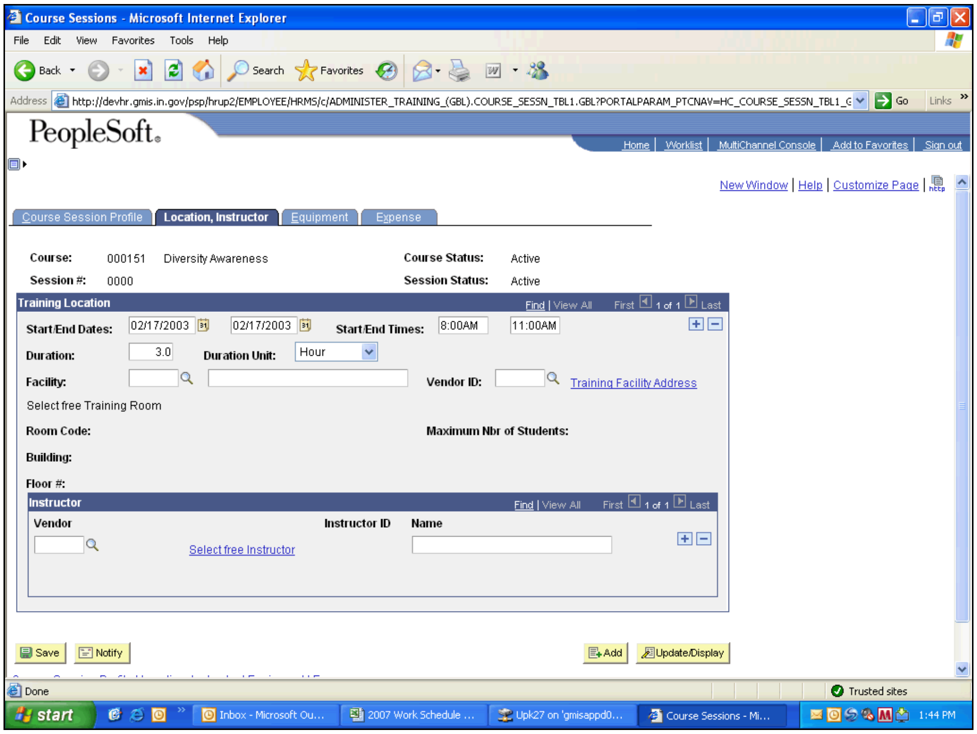
Step	Action
17.	The **Duration** field indicates the length of the training as entered into the **Start/End Times** fields. 3.0
18.	The **Duration Unit** field indicates the unit indication in the **Duration** field. **ALWAYS** use the duration unit of **Hour**. Hour
19.	Click in the **Vendor ID** field.
20.	Enter the **Business Unit** number of the business unit or vendor conducting the training into the **Vendor ID** field. If the business unit number is unknown, click on the **Magnifying Glass (Alt+5)** button to look up the course codes.



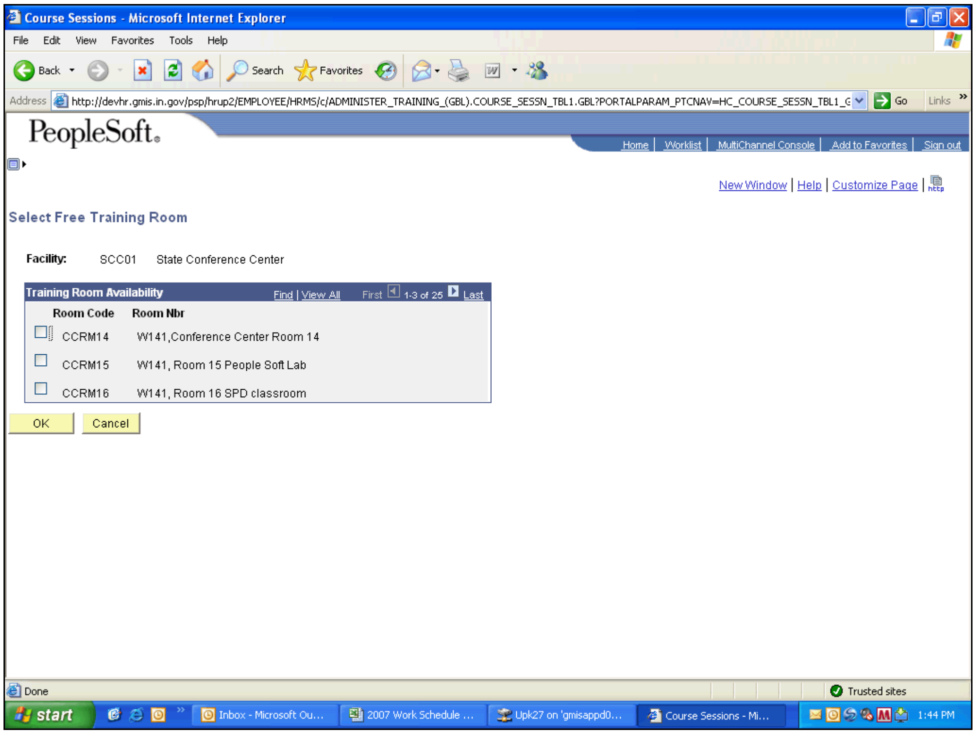
Step	Action
21.	Click the **Location, Instructor** tab.



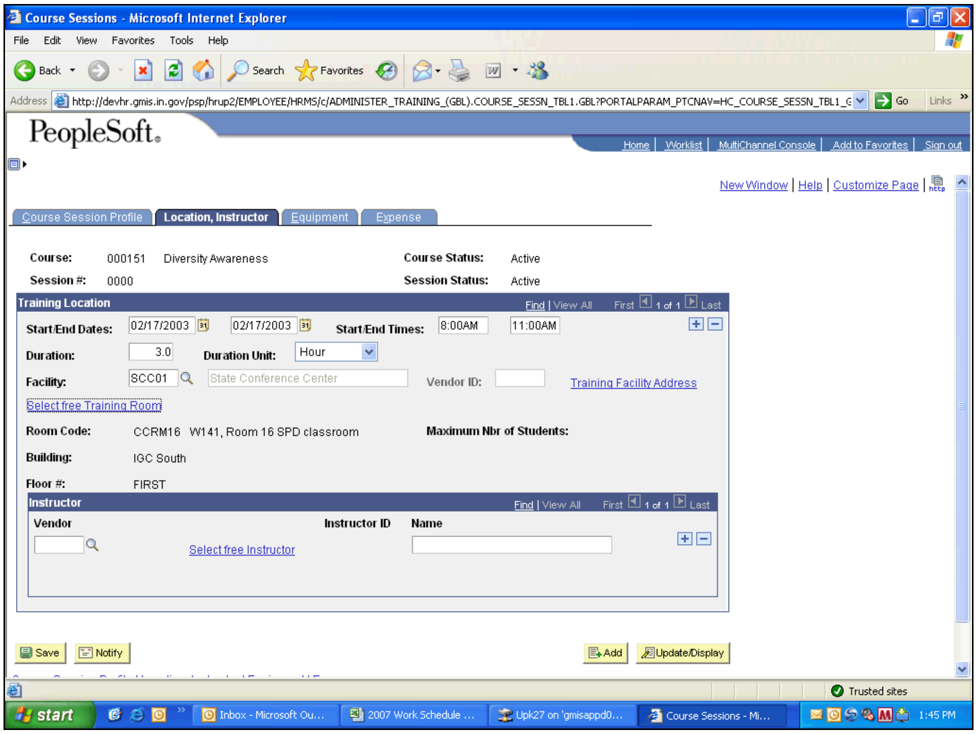
Step	Action
22.	Click in the **Facility** field.



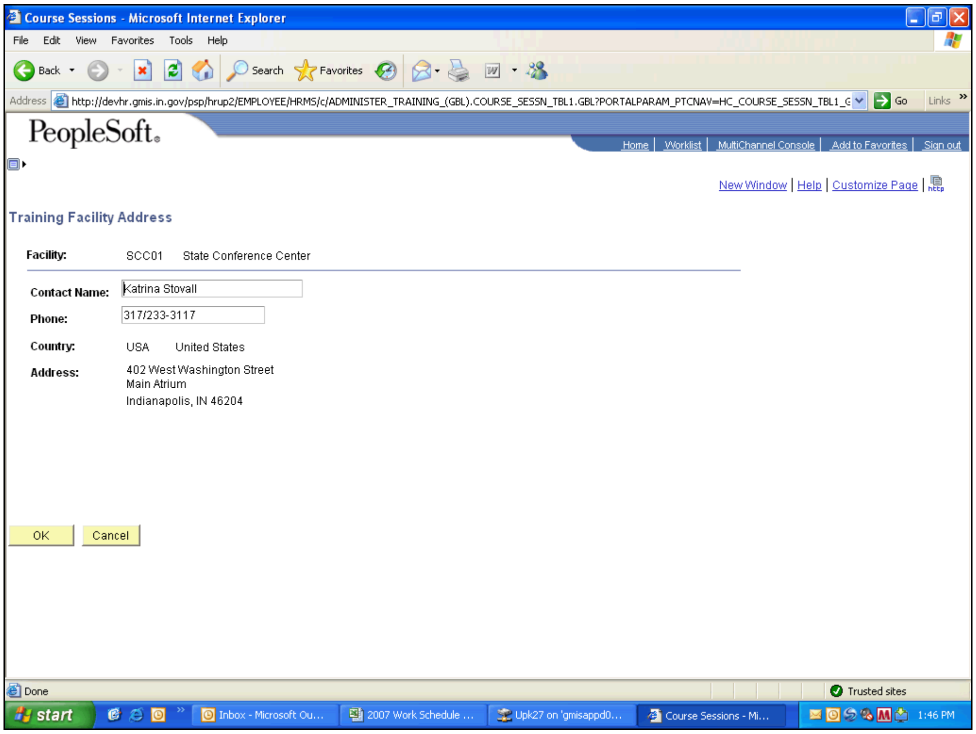
Step	Action
23.	Enter the facility location into the **Facility** field. **Note:** If the facility location code is unknown, click on the **Magnifying Glass (Alt+5)** button to look up the course codes.
24.	Press the **[Tab]** key.
25.	If a facility has more than one training room available, the **Select free Training Room** link will become active. Click the **Select free Training Room** link. Select free Training Room

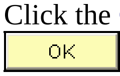


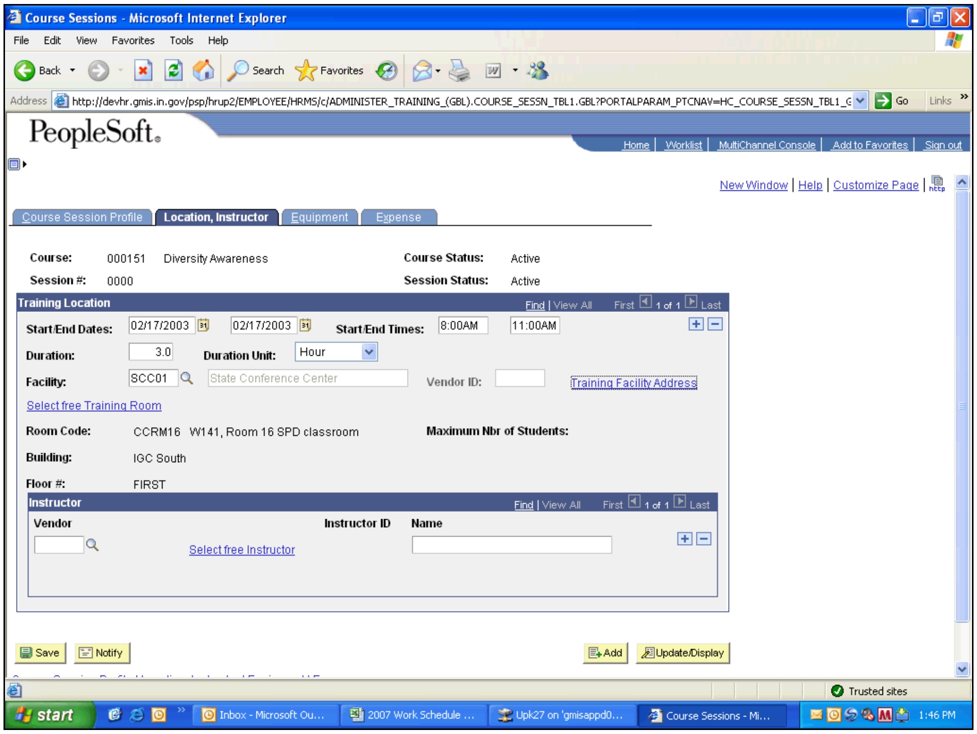
Step	Action
26.	To select a **Free Training Room**, click in the checkbox beside the **Room Code** option to be selected. 
27.	Click the **OK** button. 



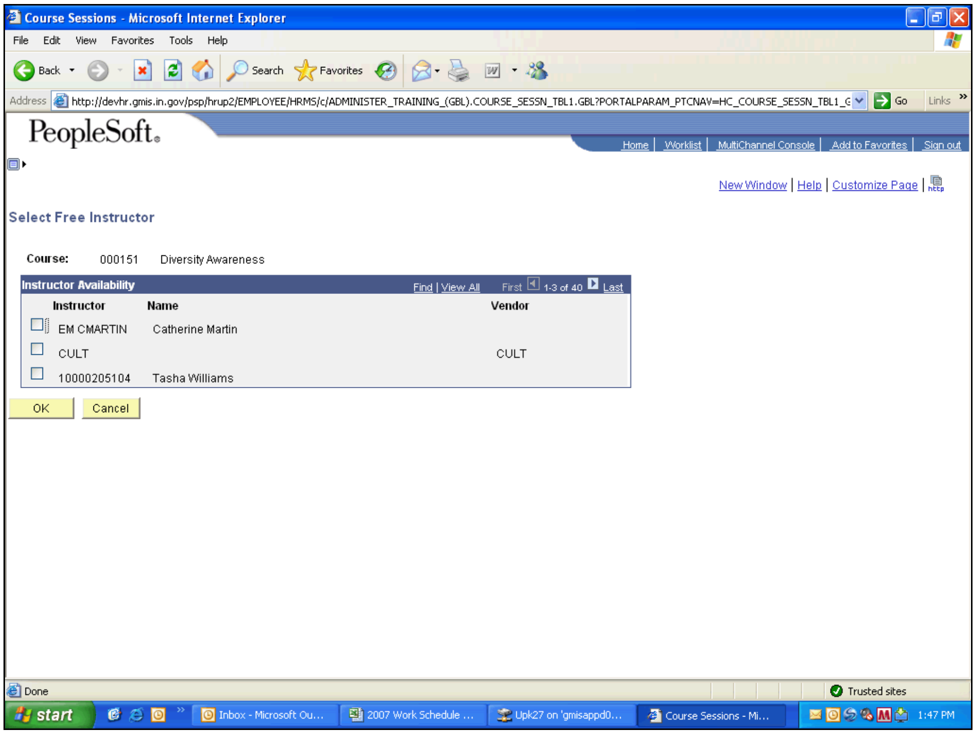
Step	Action
28.	The Training Facility Address can be viewed by clicking the **Training Facility Address** link. Click the **Training Facility Address** link. Training Facility Address

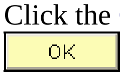


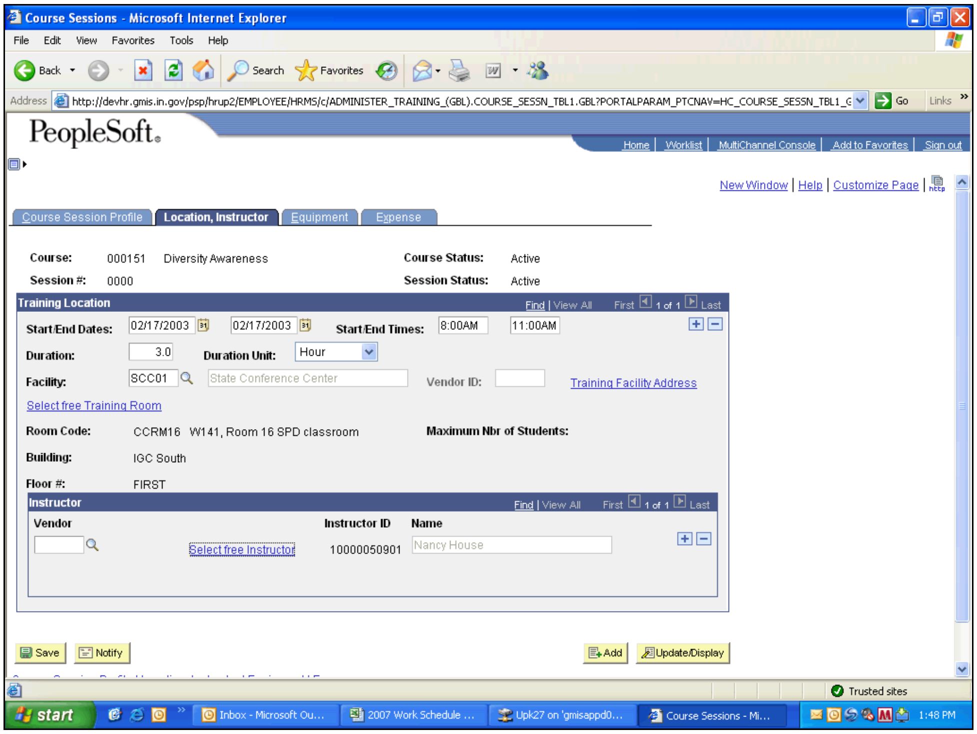
Step	Action
29.	Review the **Training Facility Address** information. Click the **OK** button when finished. 



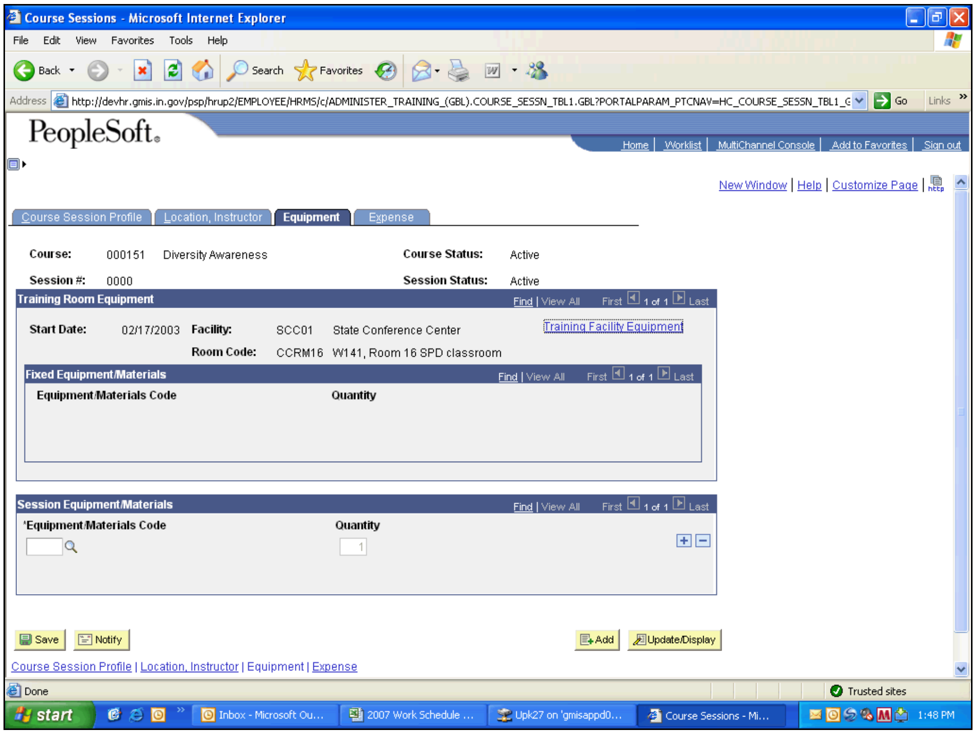
Step	Action
30.	To add instructors who are certified to teach the training, click the **Select free Instructor** link. Select free Instructor



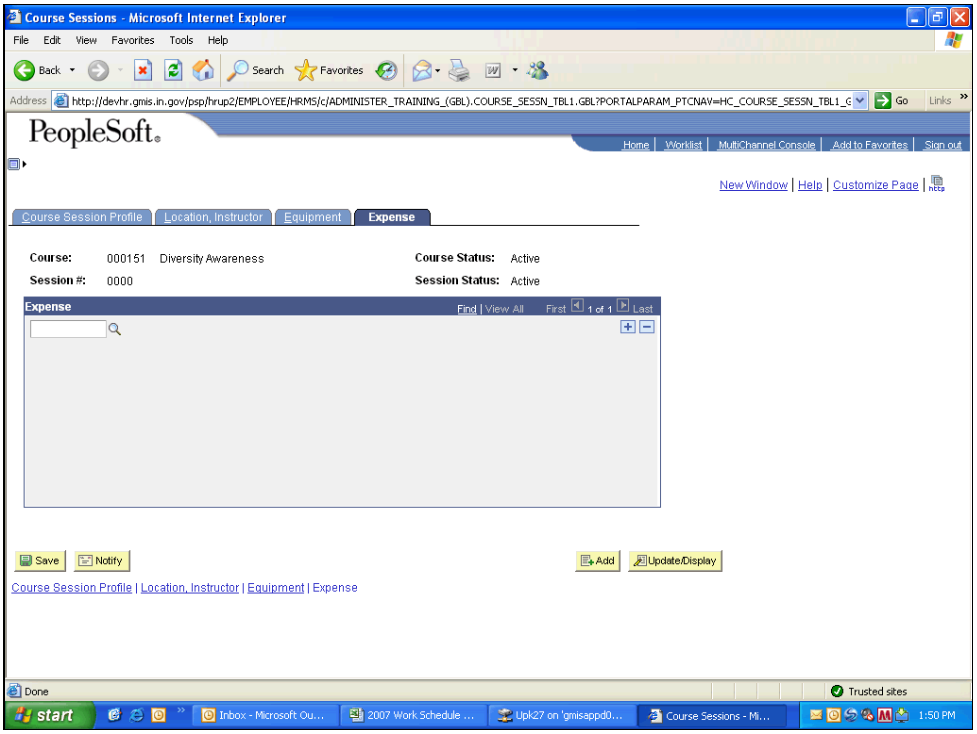
Step	Action
31.	If more than 3 choices are present, clicking the **View All** link will allow all instructors to be viewed at one time. Click the **View All** link. 
32.	Click the checkbox of the selected instructor from the **Instructor** column. 
33.	Scroll down the page to locate the OK button.
34.	Click the **OK** button. 

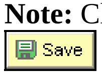


Step	Action
35.	Click the **Equipment** tab. 



Step	Action
36.	To search for equipment or materials needed for the training session, click the **Look up Equipment/Materials Code (Alt+5) Magnifying Glass** button.
37.	If the **Equipment/Materials Code** information is not known, supplies or equipment may be searched for by **Description**. Click the **Description** field drop-down menu button.
38.	Select **contains** from the list of values. contains
39.	Enter the description of the equipment or materials needed into the **Description** field.
40.	Click the **Look Up** button. Look Up
41.	Select an option from either the **Equipment/Materials Code** or **Description** column. E023 projector
42.	Click the **Expense** tab to fill in the information for any classes that charge a fee. Expense



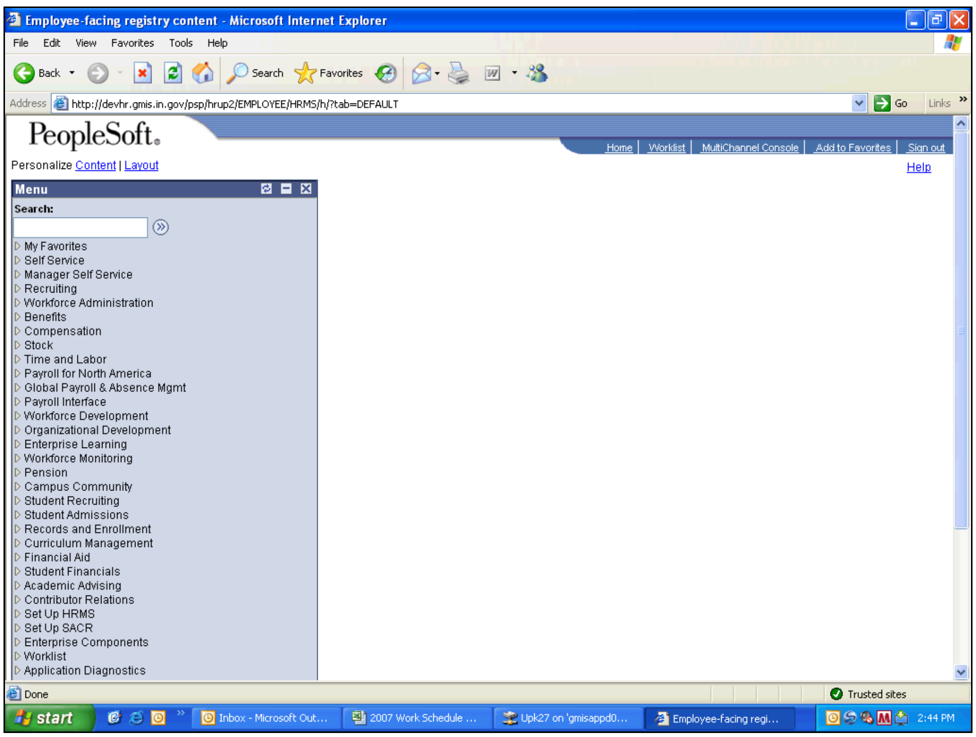
Step	Action
43.	Click the **Save** button. **Note:** Clicking the **Save** button will generate the **Session #** for the class. 
44.	Congratulations! You have successfully added a course session. **End of Procedure.**

Adding an Instructor

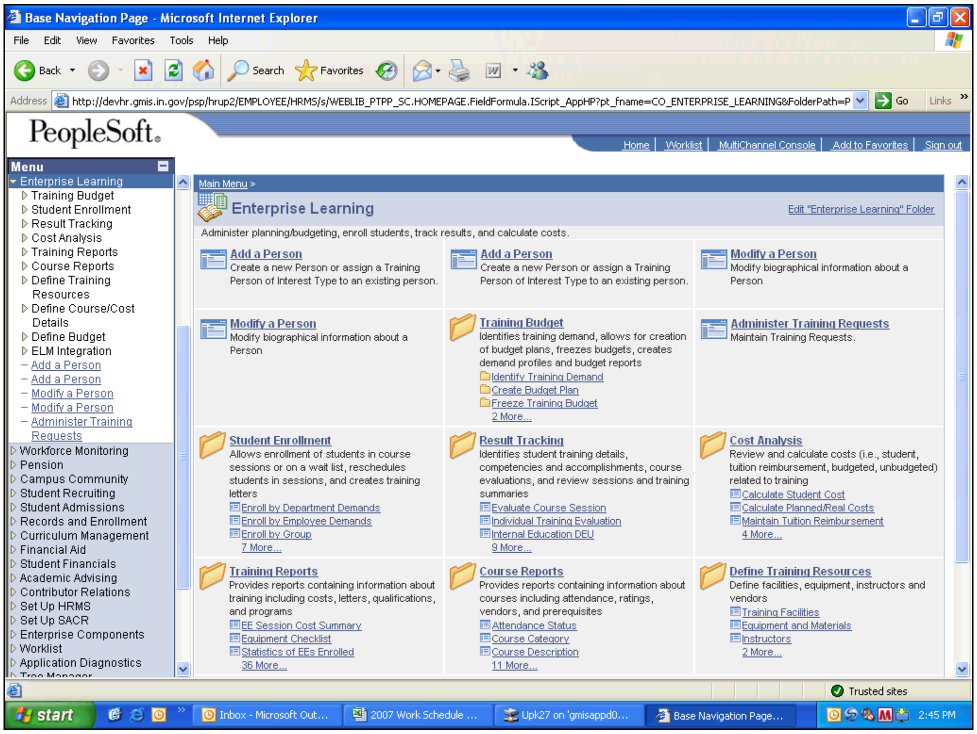
You need an instructor to lead a course. Instructors can be employees or non-employees. You cannot select instructors unless you specify that they are qualified to lead the course. You use the Instructor table to enter and update instructor information.

In this example, your company has developed a presentation course internally for employees. Luis Duarte, an employee in your company, is selected as the qualified instructor for this course. Your goal is to add Luis Duarte as an instructor into the system.

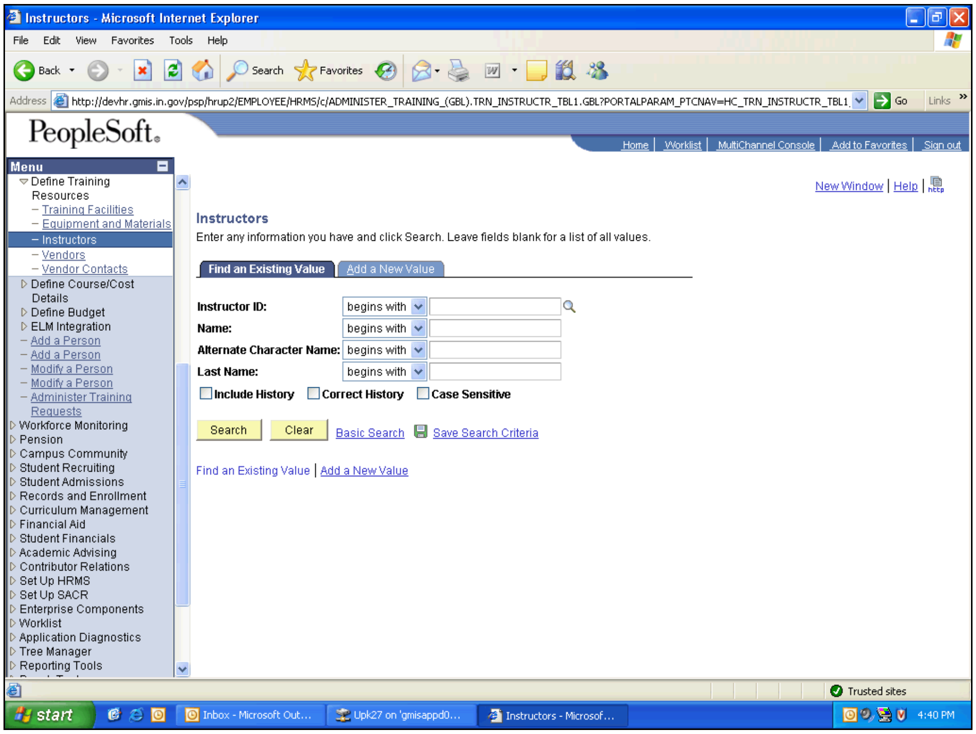
Procedure



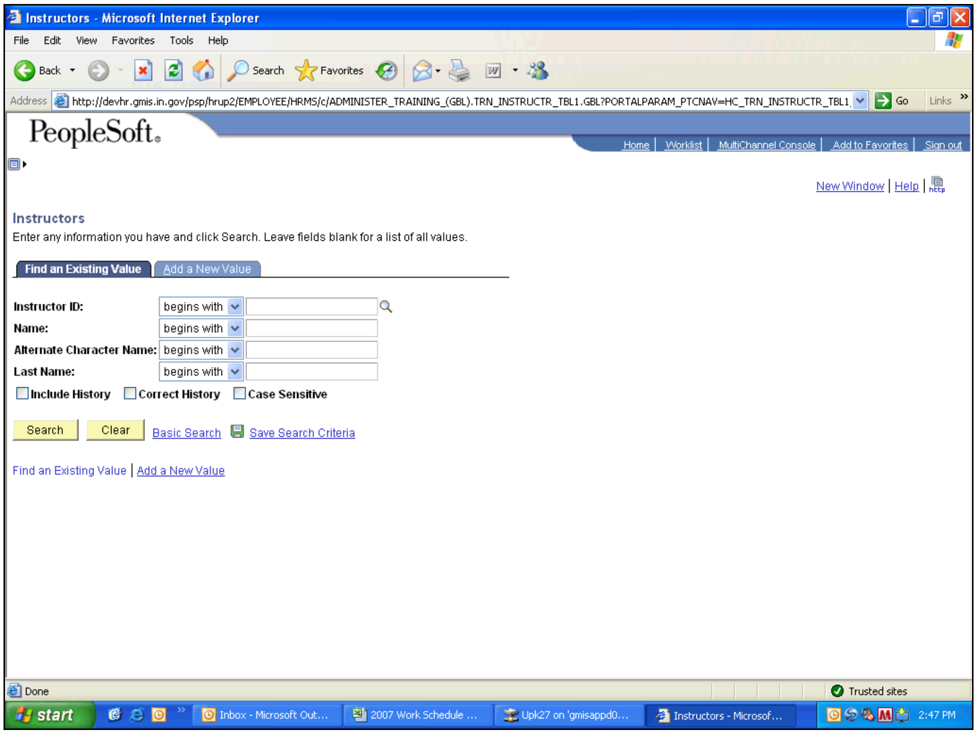
Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



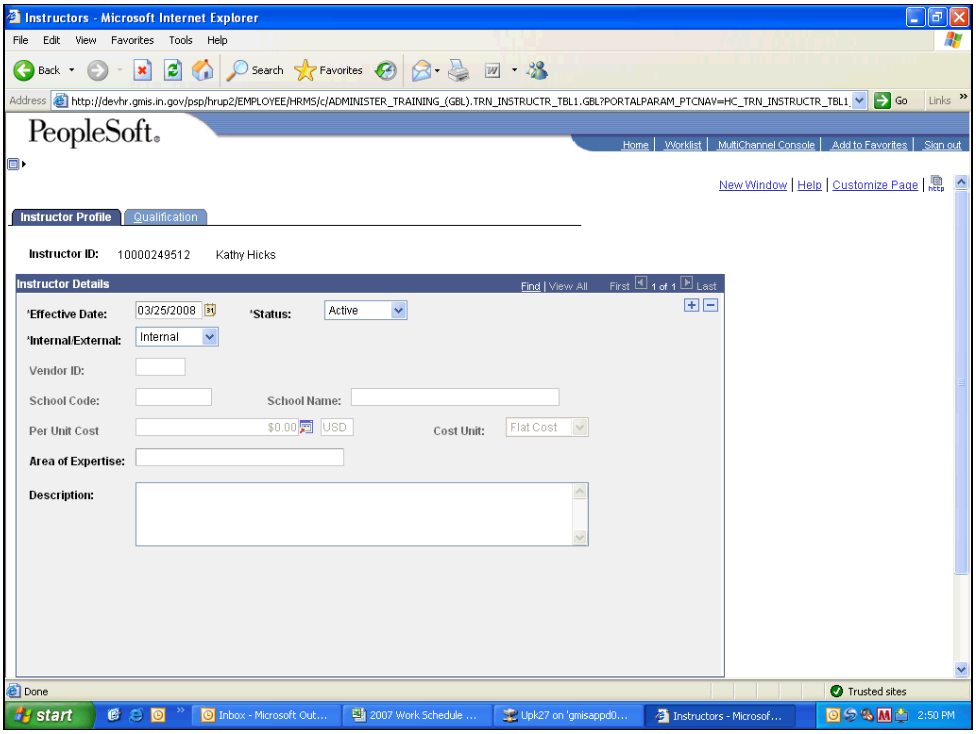
Step	Action
2.	Click the **Define Training Resources** link. Define Training Resources
3.	Click the **Instructors** link. Instructors



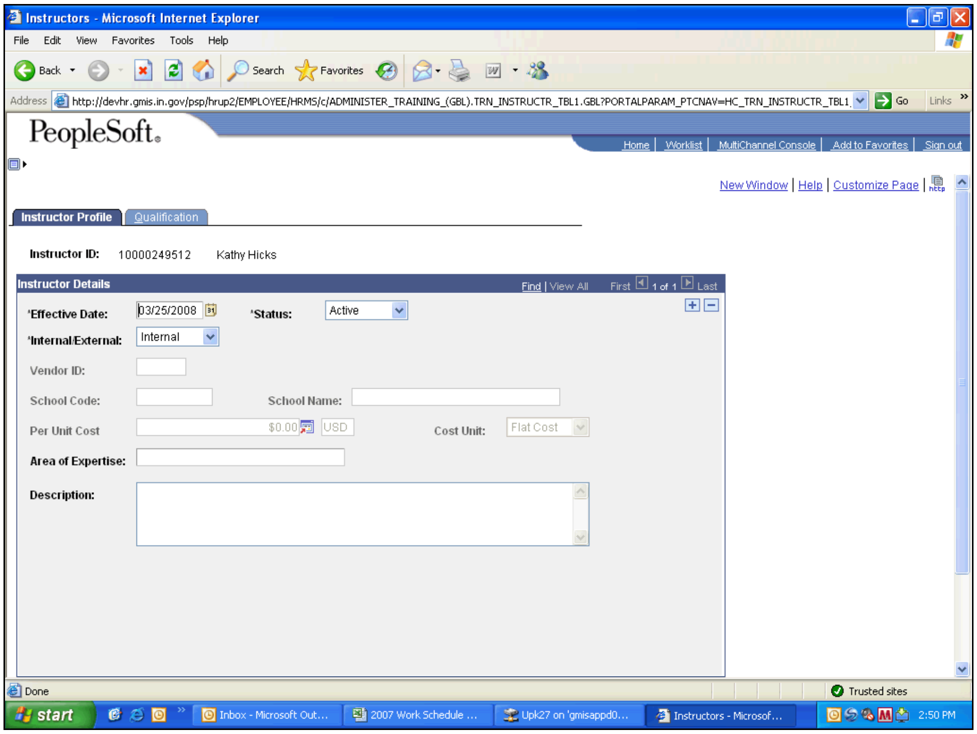
Step	Action
4.	Click the **Add a New Value** tab. **Note:** Search for an existing instructor by entering their name or searching with the **Instructor ID Magnifying Glass (Alt+5)**. Add a New Value



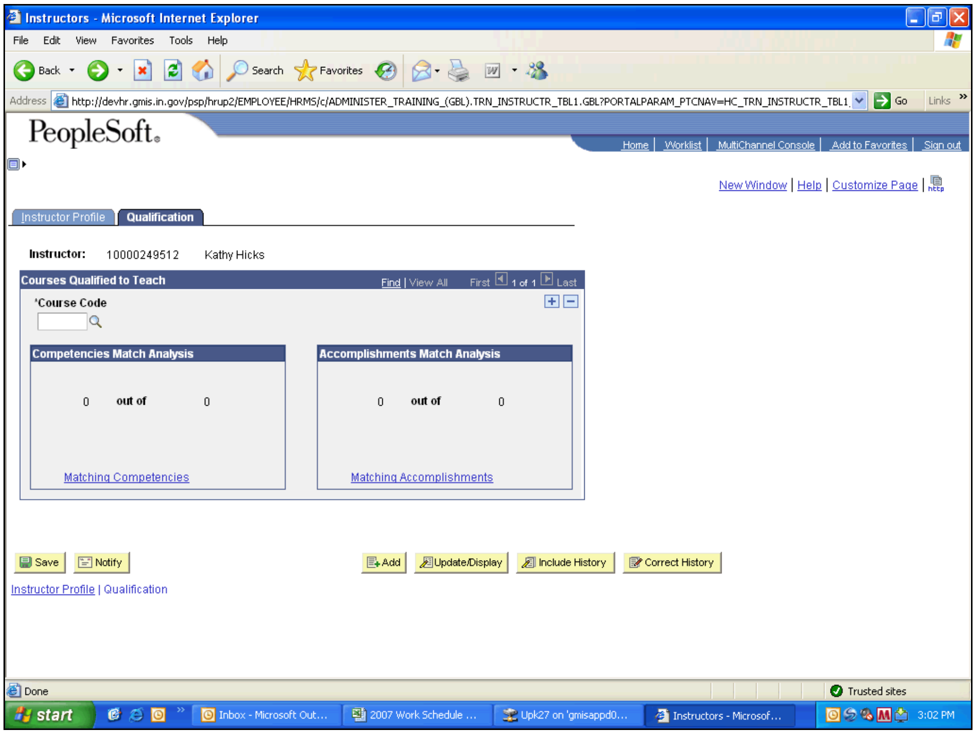
Step	Action
5.	Click the **Add a New Value** tab. 
6.	Enter the instructor's PeopleSoft ID number into the **Instructor ID** field.
7.	Click the **Add** button. 



Step	Action
8.	The **Instructor Details** information box shows the **Effective Date** the instructor was entered into the system, the instructor's **Status**, and whether the instructor is an internal State of Indiana employee or an external vendor. Additional information may be added as desired.



Step	Action
9.	Use the **Qualification** tab to **add**, **update**, or **display** the courses that the instructor is qualified to teach. Click the **Qualification** tab. 



Step	Action
10.	Click in the **Course Code** field.
11.	In the Course Code field, specify a course code from the list of courses that the instructor will teach. Enter the course code into the **Course Code** field.
12.	Press the **[Tab]** key to populate the Course title.
13.	To list additional courses the instructor is qualified to teach, click the **Add a new row** button. 
14.	Click the **Save** button. 
15.	You have successfully added an instructor. **End of Procedure.**

Enrolling Students

Enrolling Students Individually

Once you have set up your course sessions, you are ready to start enrolling students and adding students to course and session waiting lists. There are several methods of enrolling students, so you can select the best option for your facility. For example, you may set up sessions in advance and publish a training schedule that students review and submit enrollment requests. Alternatively, you may prefer to set up waiting lists and create course sessions when there are enough students on the lists to fill the session.

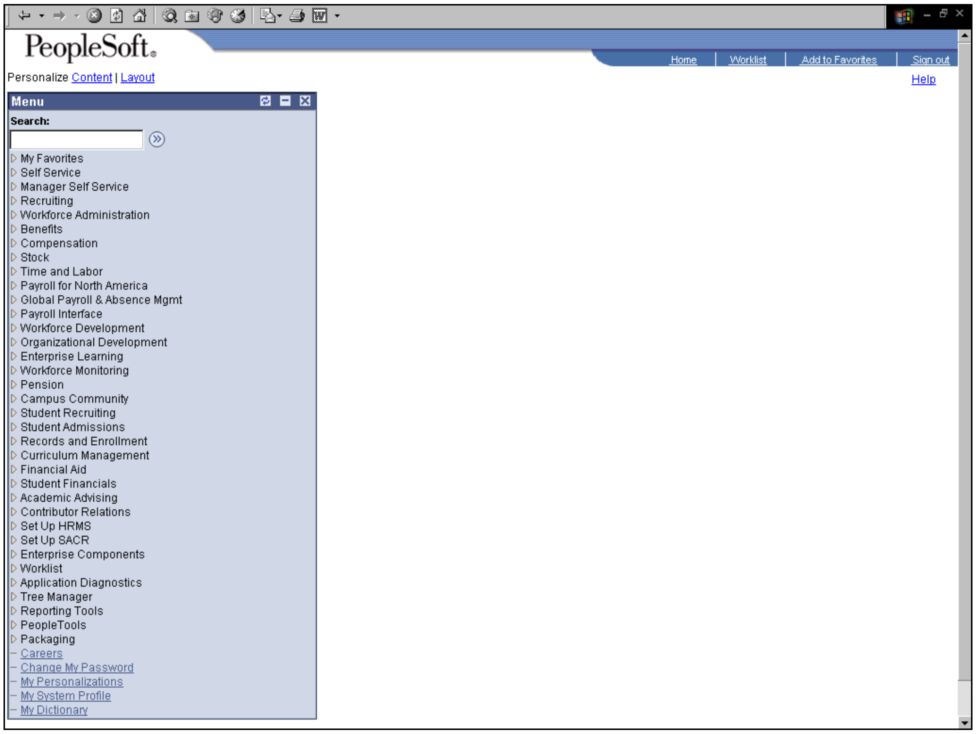
You use the **Course Session Enrollment** page to enroll students individually in a session. Before enrolling students, you set up the session by using the Course Session table.

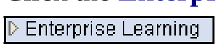
You can use the **Course Session Enrollment** page to enroll multiple students in the same session. You may enroll students or adjust the existing enrollment status codes for students already enrolled. For instance, if a student requests to withdraw their enrollment in the class, you would change the status from enrolled to dropped.

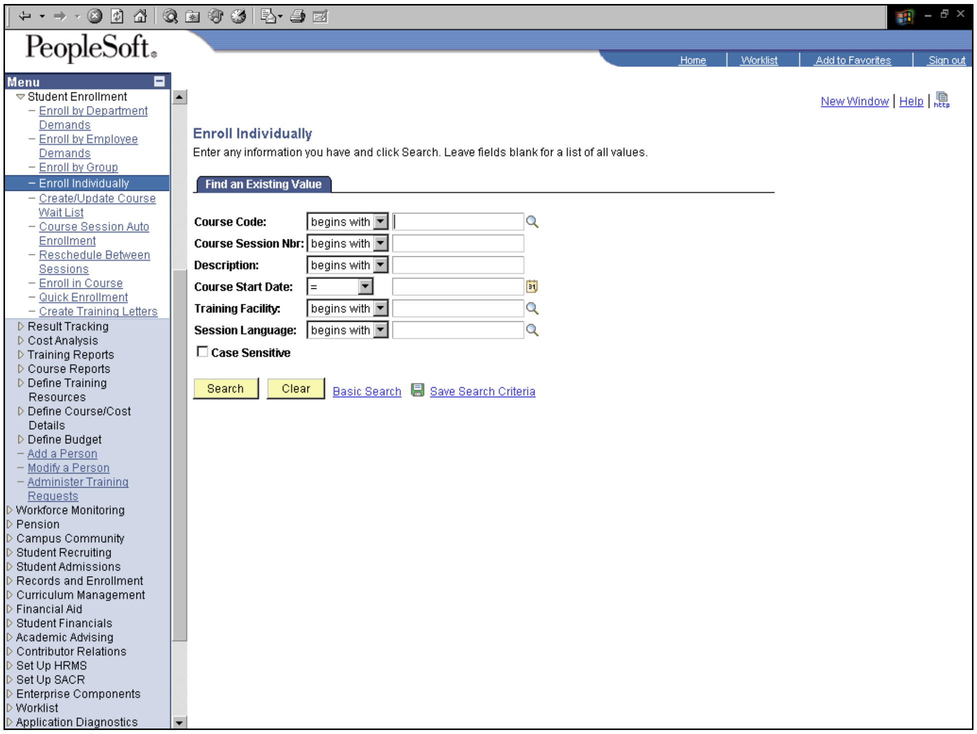
NOTE: You may only view and change enrollments for course sessions that have not been marked Complete.

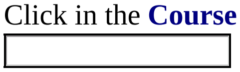
In this example, two employees want to enroll in the Presentation Skills course session 0001. Your goal is to enroll these students individually in this session and verify their enrollments.

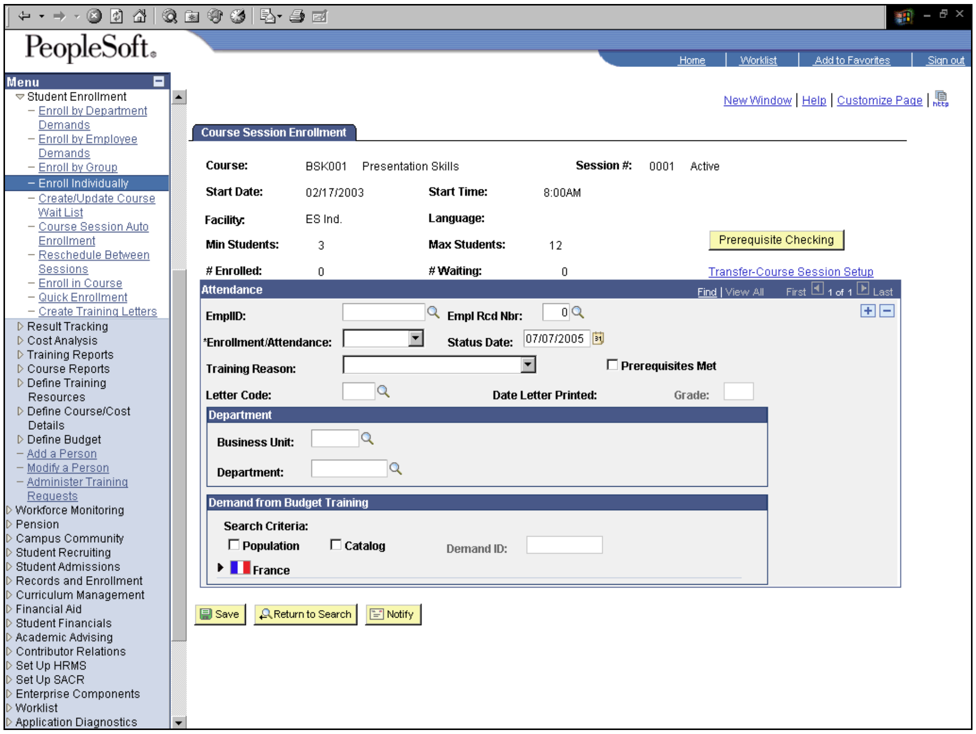
Procedure

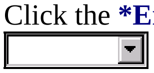


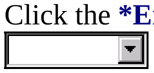
Step	Action
1.	Begin by navigating to the **Course Session Enrollment** page. Click the **Enterprise Learning** link. 
2.	Click the **Student Enrollment** link.
3.	Click the **Enroll Individually** link.



Step	Action
4.	Enter the desired information into the **Course Code** field.
5.	Click in the **Course Session Nbr** field. 
6.	Enter the desired information into the **Course Session Nbr** field.
7.	Click the **Search** button. 
8.	Use the **Course Session Enrollment** page to enroll students. **CAUTION:** As you select each student for enrollment, always double-check the Business Unit field and verify that it is the correct employee. Name searches sometimes display more than one individual with the same name.



Step	Action
9.	Enter the desired information into the **EmplID** field.
10.	Specify the student enrollment status, such as Enrolled or Sessn Wait in the **Enrollment/Attendance** field. Click the ***Enrollment/Attendance** list. 
11.	Select **Enrolled**. 
12.	The **Status Date** field uses the current system date by default. Accept the default date for this field.
13.	Specify the reason for training in the **Training Reason** field. Click the **Training Reason** list. 
14.	Click an entry in the list. Always select **Skill Enhancement.** 

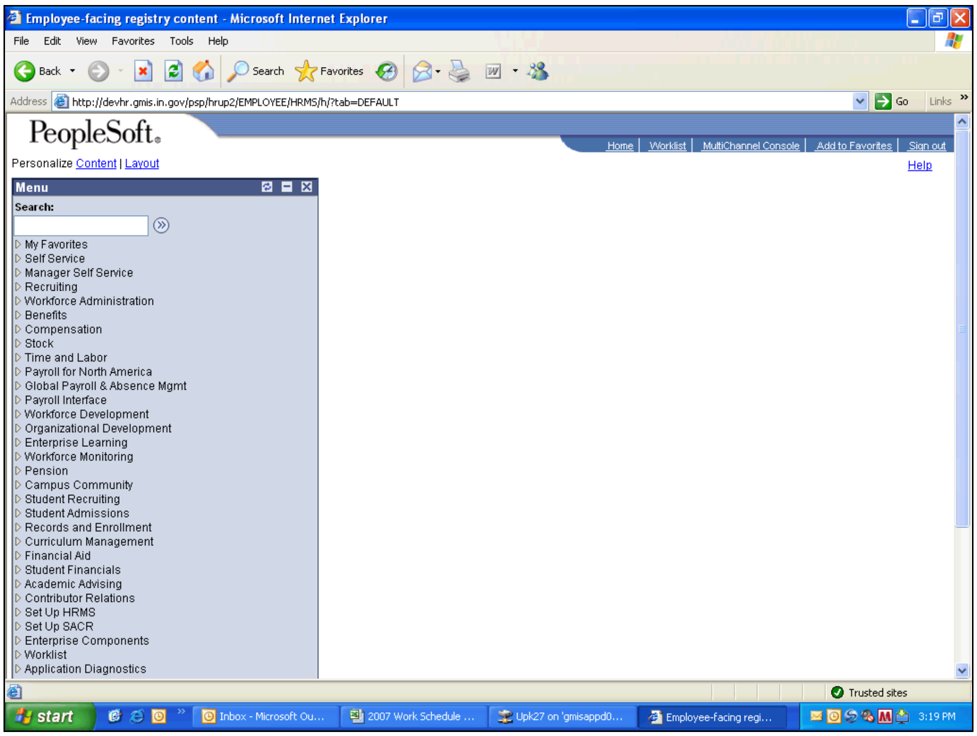
Step	Action
15.	Leave the **Prerequisites Met** option turned off. After you have finished all enrollments, you may use **Prerequisite Checking** (above) to verify that your students' course requirements have been met. Prerequisites, if used, would need to be set up when the Course is entered into the system.
16.	You may use the **Prerequisite Checking** button to search the Student Training records listed on the **Session Enrollment** page and determine if each student has completed and passed the prerequisite courses. If so, PeopleSoft populates the **Prerequisites Met** check box for each student who meets the criteria. If a student is lacking the necessary courses, a process for notifying students of discrepancies may be developed. Also, any enrolled status existing for students who do not meet the prerequisites may be manually changed.
17.	Use the **Letter Code** field to generate a form letter. The letter code defaults to CON, indicating Confirmed. For this exercise, accept the default letter code value. **IMPORTANT!!** The system does not currently support the generation of letters. At this time, you must have an alternative method of notifying students.
18.	We will now add another student. Click the **Add Row** button. 
19.	Enter the desired information into the **EmplID** field.
20.	Click the ***Enrollment/Attendance** list. 
21.	Click an entry in the list. Select **Enrolled.** 
22.	Click the **Training Reason** list. 
23.	Click an entry in the list. Select **Skill Enhancement.** 
24.	You have enrolled two employees in Presentation Skills course session 0001. If you enroll more than the maximum number of employees allowed in the session, the PeopleSoft application issues a warning message when you save the page.
25.	Your enrollment(s) are completed. Click the **Save** button. 

Step	Action
26.	You have successfully enrolled individual students into a course session. **End of Procedure.**

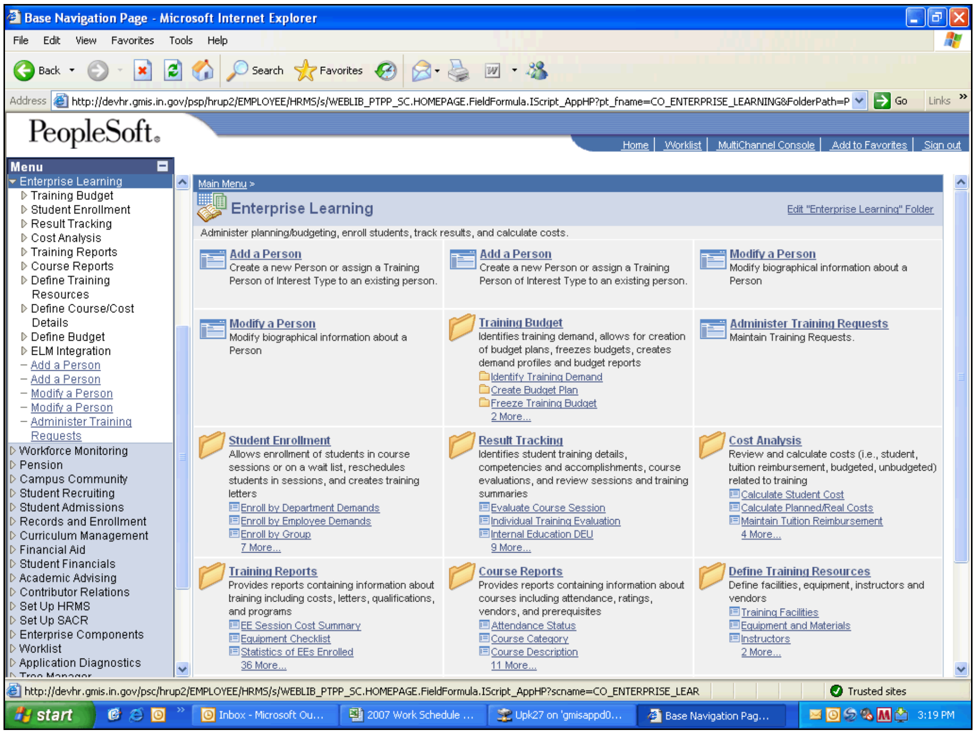
Enrolling Students in Multiple Courses

Enrolling one employee into multiple courses could be a time consuming task if using the Enroll Individually module. By using the Enroll In Course module, one employee may be entered into multiple courses without moving from one course to another.

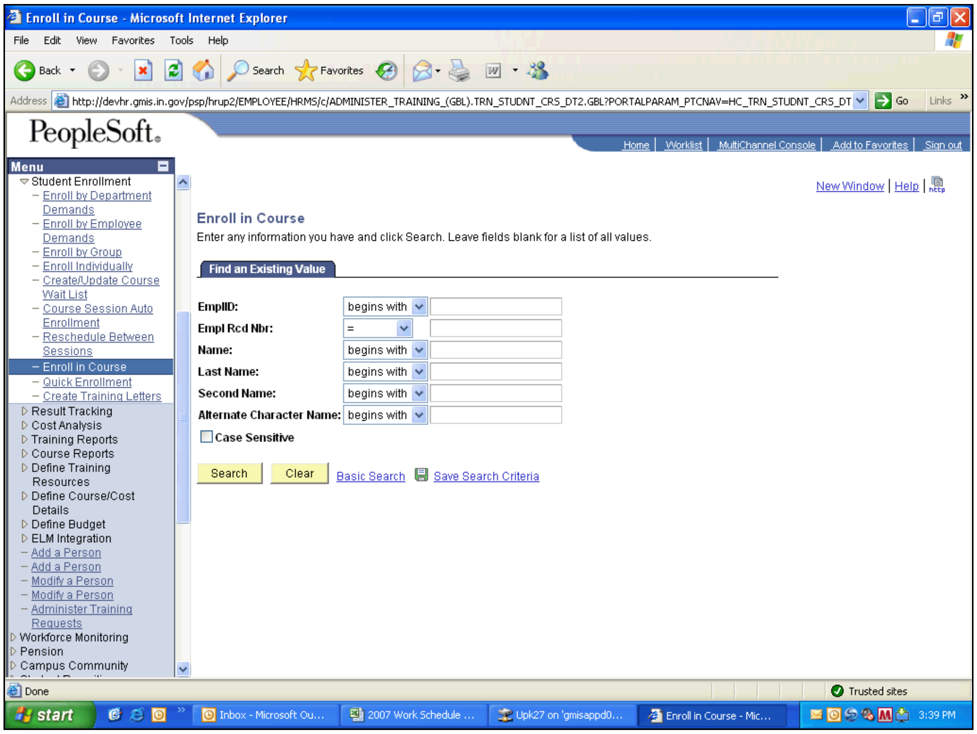
Procedure



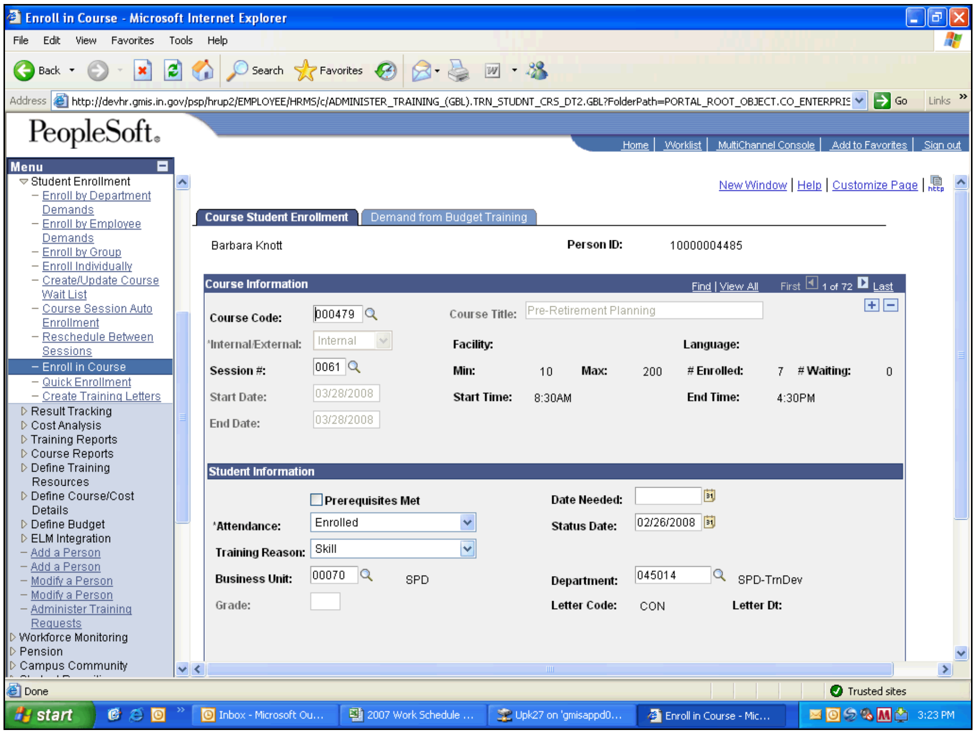
Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



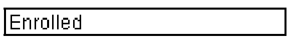
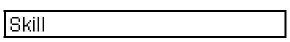
Step	Action
2.	Click the **Student Enrollment** link. Student Enrollment
3.	Click the **Enroll in Course** link. Enroll in Course
4.	Click the **Enroll in Course** link. Enroll in Course



Step	Action
5.	Enter the employee ID number into the **EmplID** field. If the employee's employee ID number is not known, search by the employee's name.
6.	Click the **Search** button. Search



Step	Action
7.	Click the **Add a new row** button.
8.	Enter the course code of the course in which to enroll the employee into the **Course Code** field.
9.	Press the **[Tab]** key to populate the course title.
10.	Click in the **Session #** field.
11.	Enter the course session number in which to enroll the employee into the **Session #** field.
12.	Press the **[Tab]** key to populate the course session's information.
13.	Click the **Attendance** drop-down menu button.
14.	Select **Enrolled** from the list of values. Enrolled
15.	Click the **Training Reason** drop-down menu button.
16.	Select **Skill** from the list of values. Skill

Step	Action
17.	Click the **Add a new row** button to add another course in which to enroll the employee. 
18.	Enter the course code of the course in which to enroll the employee into the **Course Code** field.
19.	Press the **[Tab]** key to populate the course title.
20.	Click in the **Session #** field. 
21.	Enter the course session number in which to enroll the employee into the **Session #** field.
22.	Press the **[Tab]** key to populate the course session's information.
23.	Click the **Attendance** drop-down menu button. 
24.	Select **Enrolled** from the list of values. 
25.	Click the **Training Reason** drop-down menu button. 
26.	Select **Skill** from the list of values. Continue adding rows and course information until the employee has been enrolled in all needed courses. 
27.	Scroll down the page to locate the **Save** button.
28.	Click the **Save** button. 
29.	**End of Procedure.**

Creating a Wait List

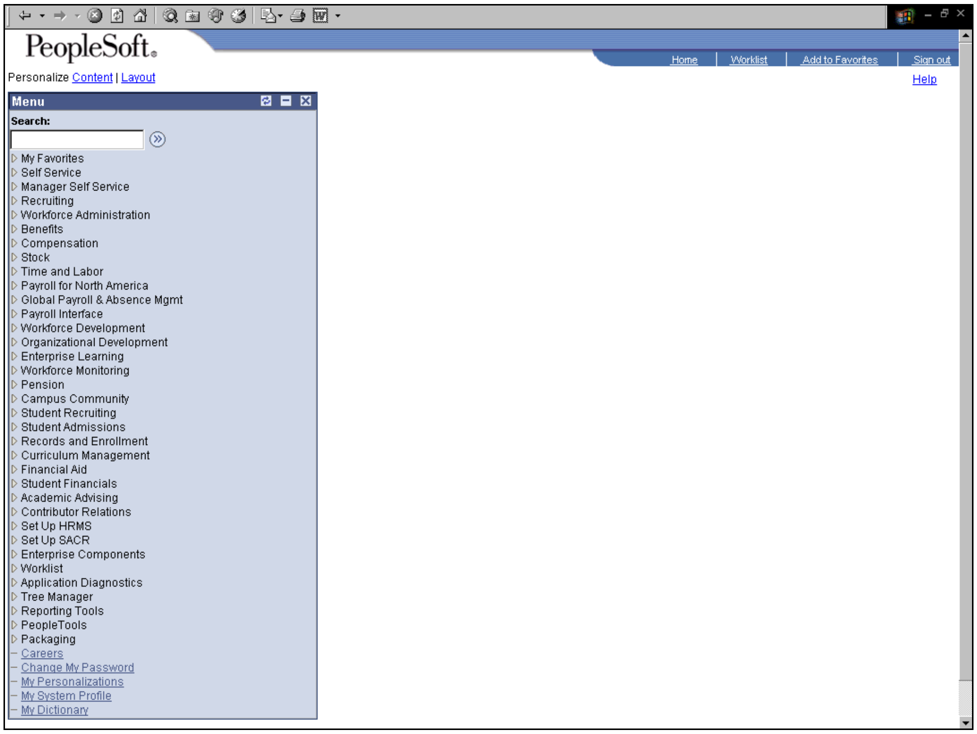
Wait lists are used to organize the enrollment process and ensure fair enrollment. In addition, you use wait lists to monitor course demand and create sessions when enrollment demand is high. Alternatively, they are used to collect requests for existing course sessions, and enable automatic enrollment of students in the session.

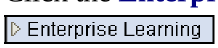
With the use of wait lists and automatic session enrollment, it is necessary to understand the way PeopleSoft processes information. The order in which students are enrolled from wait lists into sessions is determined by the PeopleSoft processing logic.

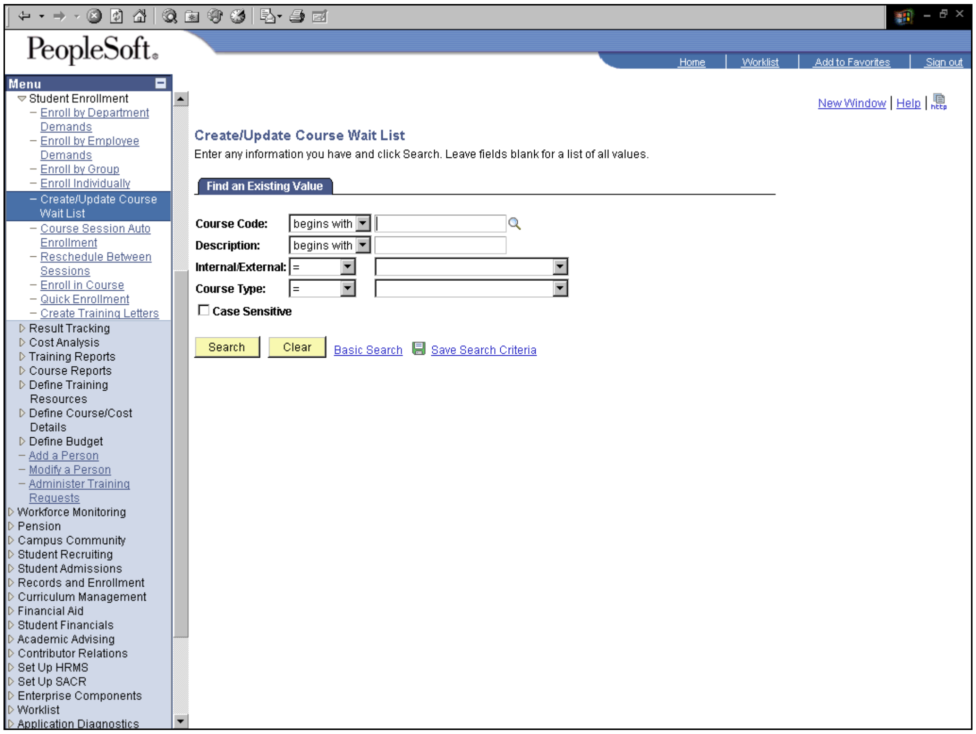
When using course auto-enrollment, the session for which students are being enrolled must be specified. Once the session is selected, PeopleSoft enrolls students in the following order of preference or hierarchy:
- **Session Waitlist Status:** Students with session wait list for the particular session selected are given priority over any student with a general course wait list status.
- **Waitlist Date:** Students with session wait list status are then sorted for enrollment based on their wait list date, the date they were entered onto the wait list. Generally, the student with the oldest date is given first priority. If multiple students share the same date, priority is based on ID.
- **ID:** Among students who share the same session wait list date, employees always get first opportunity for training sessions. If all of those employees have been enrolled, then non-employees with that same session wait list date are enrolled.
- If all students with session wait list status for this session have been enrolled, then students with general course wait list status are enrolled under the same wait list date and ID guidelines listed above for session wait list status.
- If a session has fewer seats available than students of equal standing, PeopleSoft does not perform any enrollment automatically. In that case, manual enrollment must be used, and some other form of selection must be imposed. Alternatively, the session could be modified to allow a larger enrollment.

In this exercise, two people requested enrollment in the Professional Presentations course session K005. Your goal is to add them to a wait list for the Professional Presentations course session.

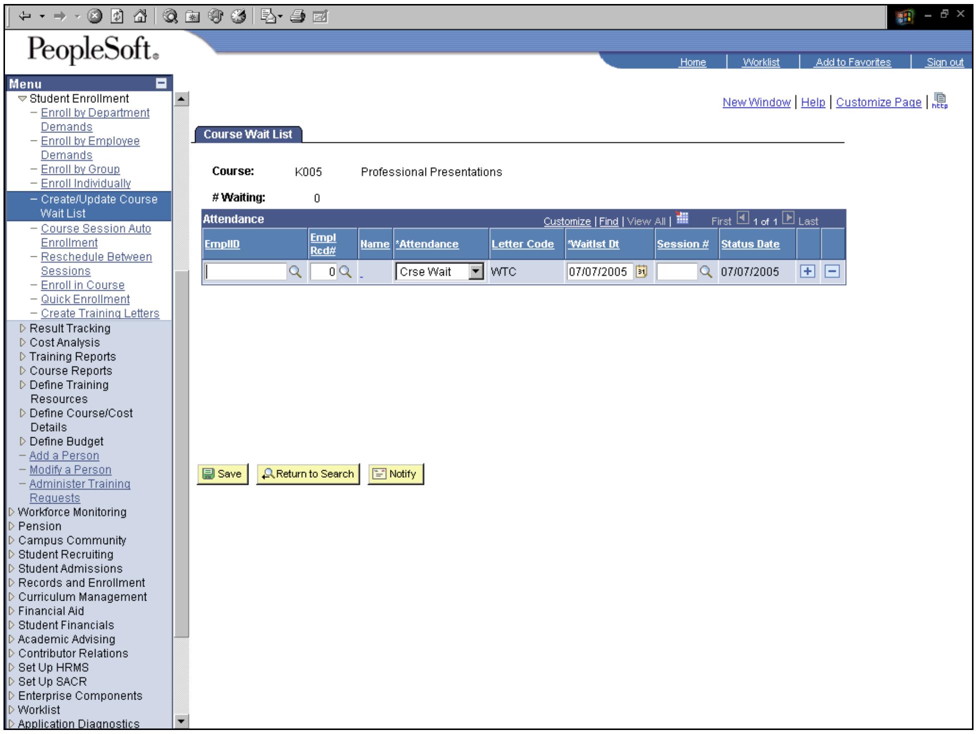
Procedure

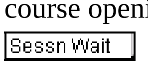


Step	Action
1.	Click the **Enterprise Learning** link. 
2.	Click the **Student Enrollment** link.
3.	Click the **Create/Update Course Wait List** link.



Step	Action
4.	Enter the desired information into the **Course Code** field.
5.	Click the **Search** button. Search
6.	Use the **Course Wait List** page to add employees and non-employees to wait lists and assign the enrollment status. For this exercise, add two employees to the wait list. To add them to the wait list, specify their IDs in the **EmplID** field.

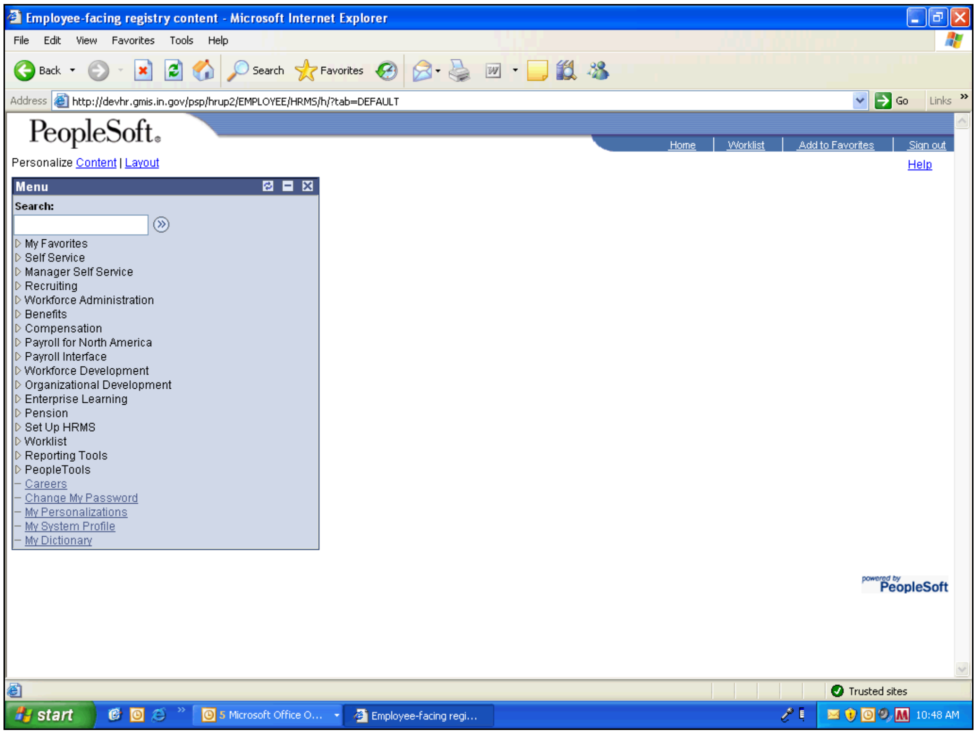


Step	Action
7.	Enter the desired information into the **EmplID** field.
8.	Assign a wait list status to the employee in the **Attendance** field. The PeopleSoft application provides a course wait list and a session wait list. Both of these statuses are used in the processing logic when enrolling students from a wait list to a session. The **course wait** option would be used when employees are interested in attending a course that does not have the required number of minimum students to schedule a course session. Click the **Attendance** drop-down menu button. 
9.	Select **Sessn Wait** from the list of values. **Session Wait** is used when a course session is full and an employee is awaiting a course opening. 

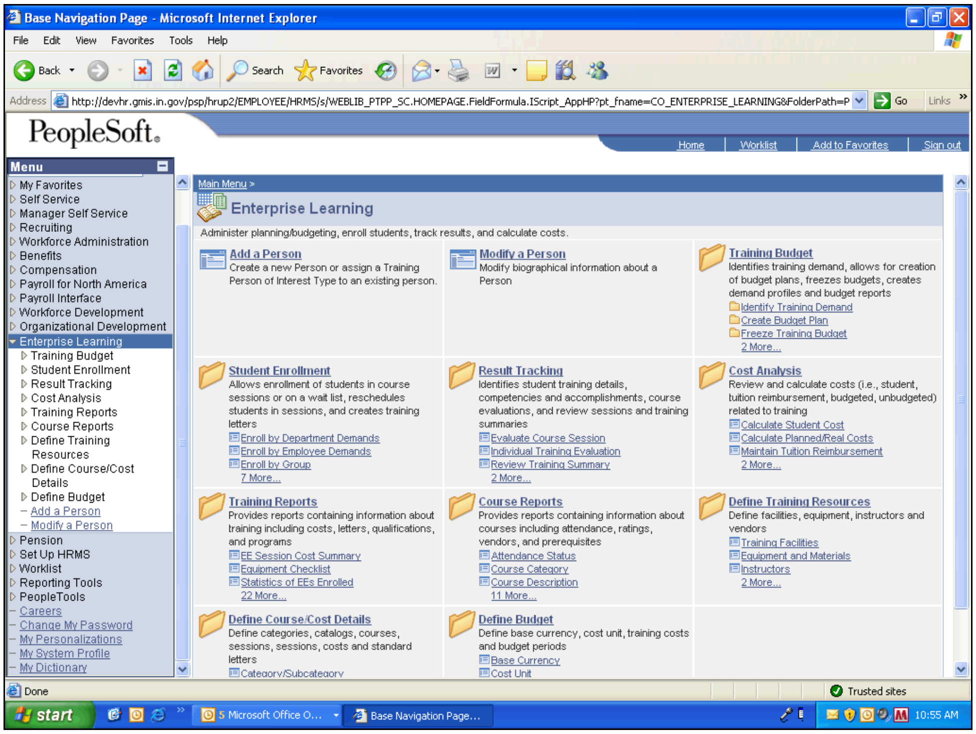
Step	Action
10.	The system populates a letter code from the **Standard Letter** table according to the student's wait list status. The system also populates the wait list date based on the current date. The PeopleSoft application uses this date to enroll students from the oldest date to the most recent date. You can override this date if the student requested for enrollment in the course on a different date. For this example, accept the default wait list date in the **Waitlst Dt** field.
11.	Click in the **Session #** field. 
12.	If you assign a session wait list status to a student, specify the session number from the list of Active sessions in the **Session #** field. Enter the session number information into the **Session #** field.
13.	Click the **Add a new row** button. 
14.	Enter the next employee ID number into the **EmplID** field for the next employee to be added to the list.
15.	Click the **Attendance** drop-down menu button. 
16.	Select **Sessn Wait** from the list of values. 
17.	Click in the **Session #** field. 
18.	Enter the course session number into the **Session #** field.
19.	Click the **Save** button. 
20.	You have successfully created a wait list. **End of Procedure.**

Creating a Sign in Sheet

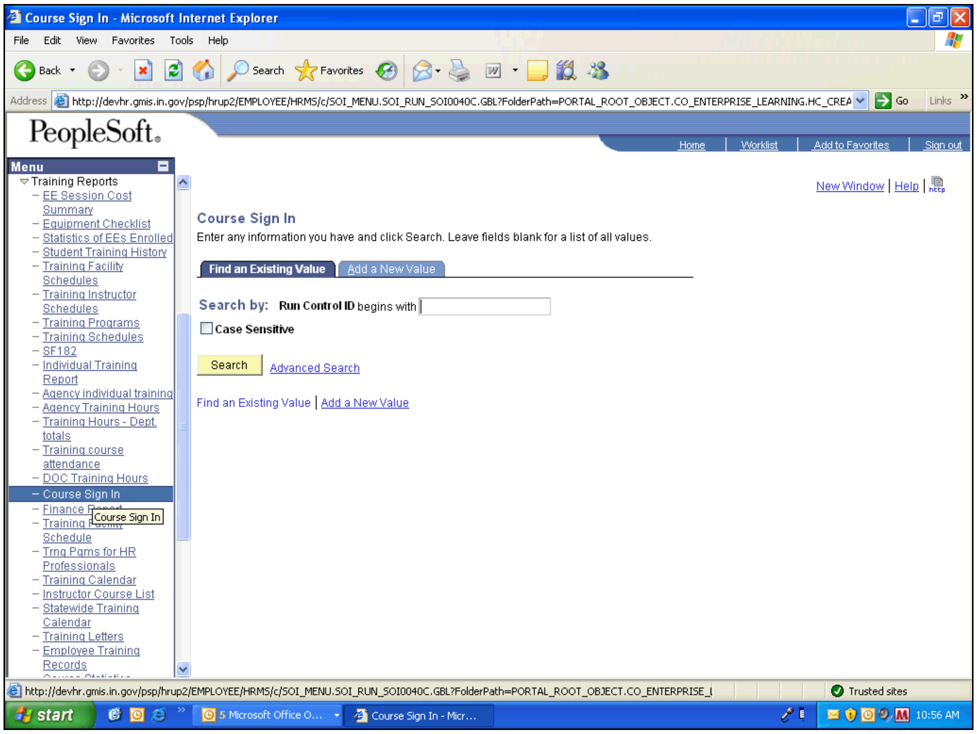
Procedure



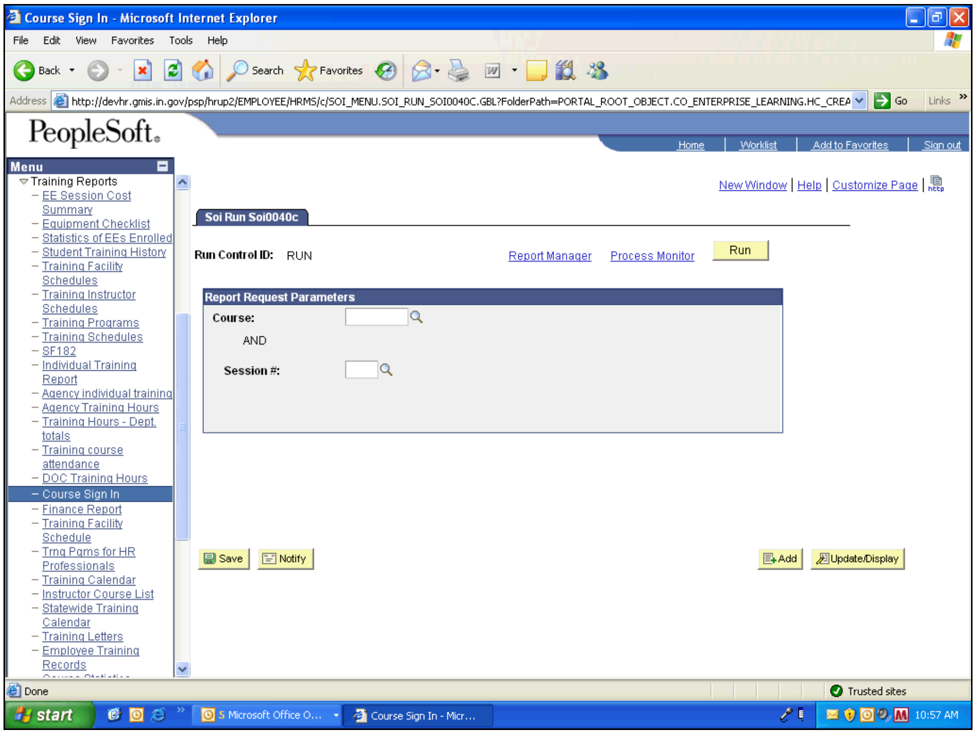
Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning



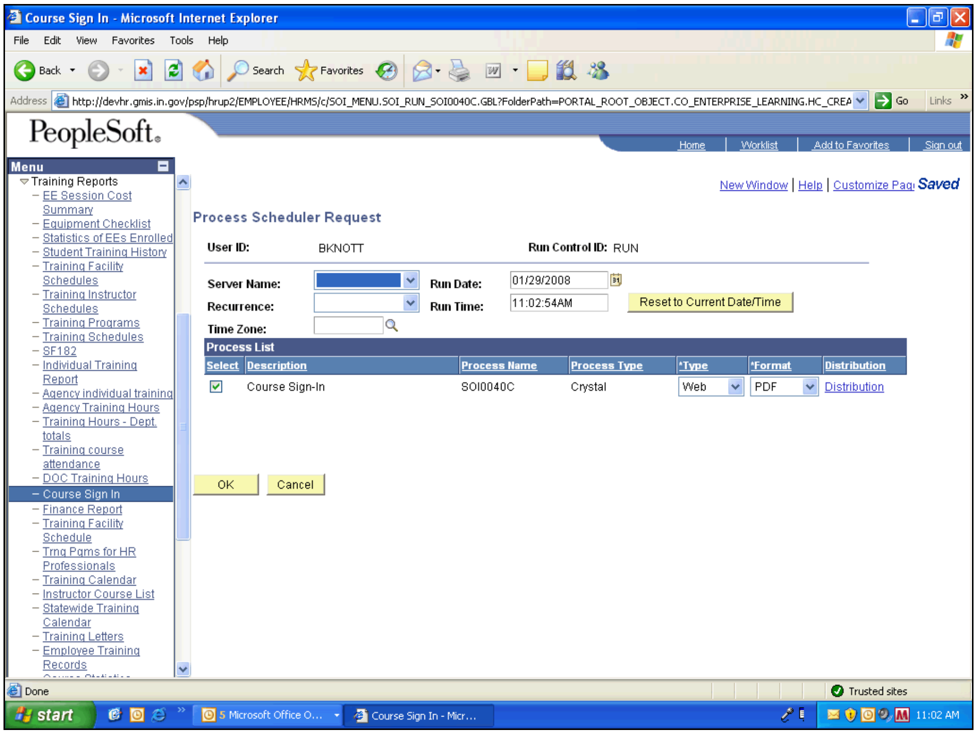
Step	Action
2.	Click the **Training Reports** link. Training Reports
3.	Click the **Course Sign In** link. Course Sign In



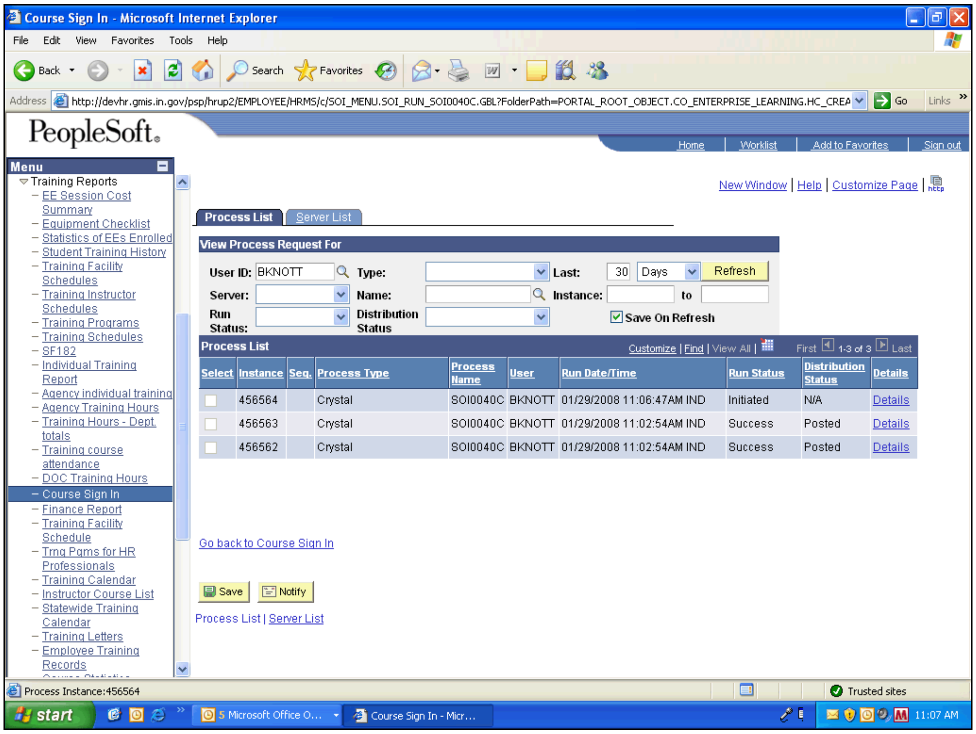
Step	Action
4.	Click the **Add a New Value** tab. Add a New Value
5.	Enter the run control ID into the **Run Control ID** field. **Note:** The run control ID is not an assigned value. It is created by the user. The run control ID identifies the employee producing the course sign in sheet.
6.	Click the **Add** button. Add



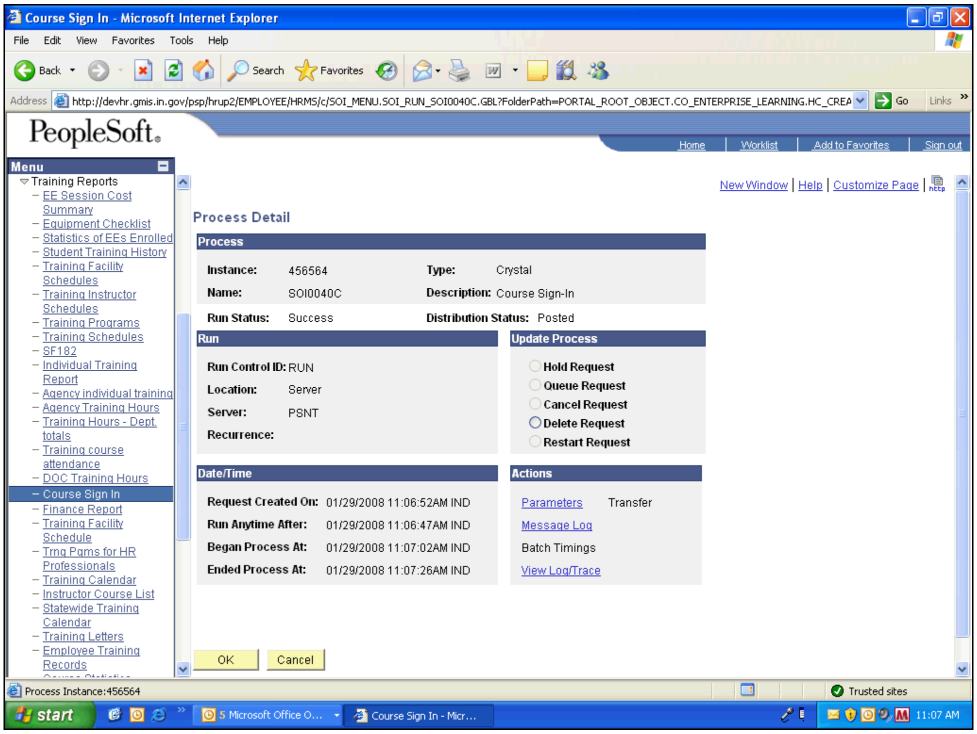
Step	Action
7.	Click in the **Course** field. 
8.	Enter the course number into the **Course** field.
9.	Press the **[Tab]** key.
10.	To add the session number, click the **Session # Magnifying Glass** button. 
11.	Click a course session number in the **Course Session Nbr** column. 
12.	Click the **Run** button. 



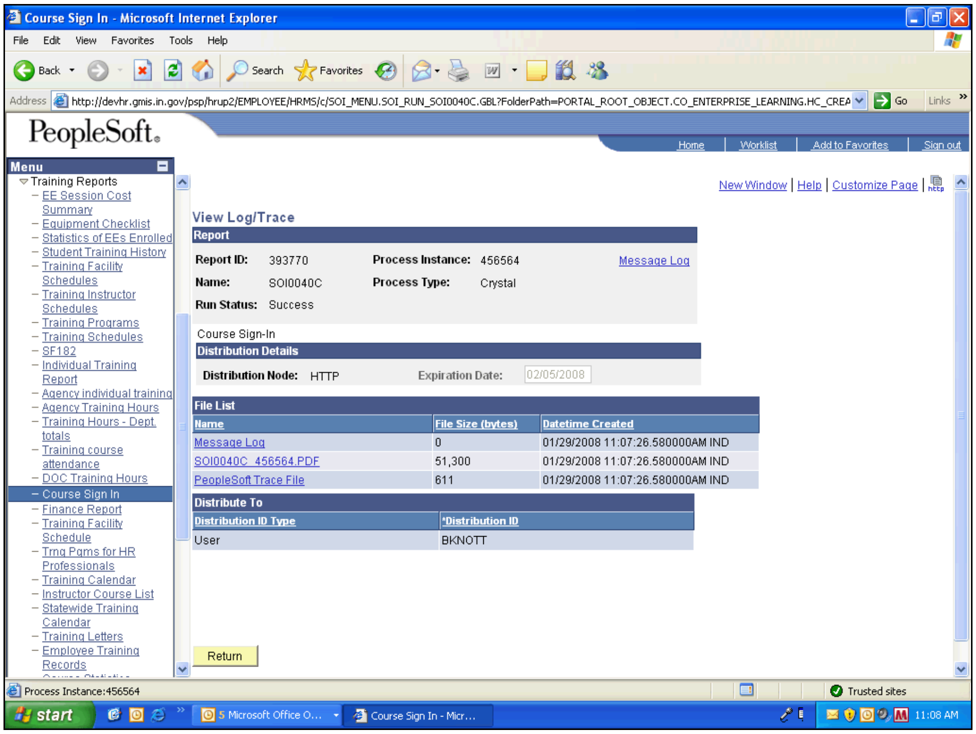
Step	Action
13.	Click the **OK** button. OK



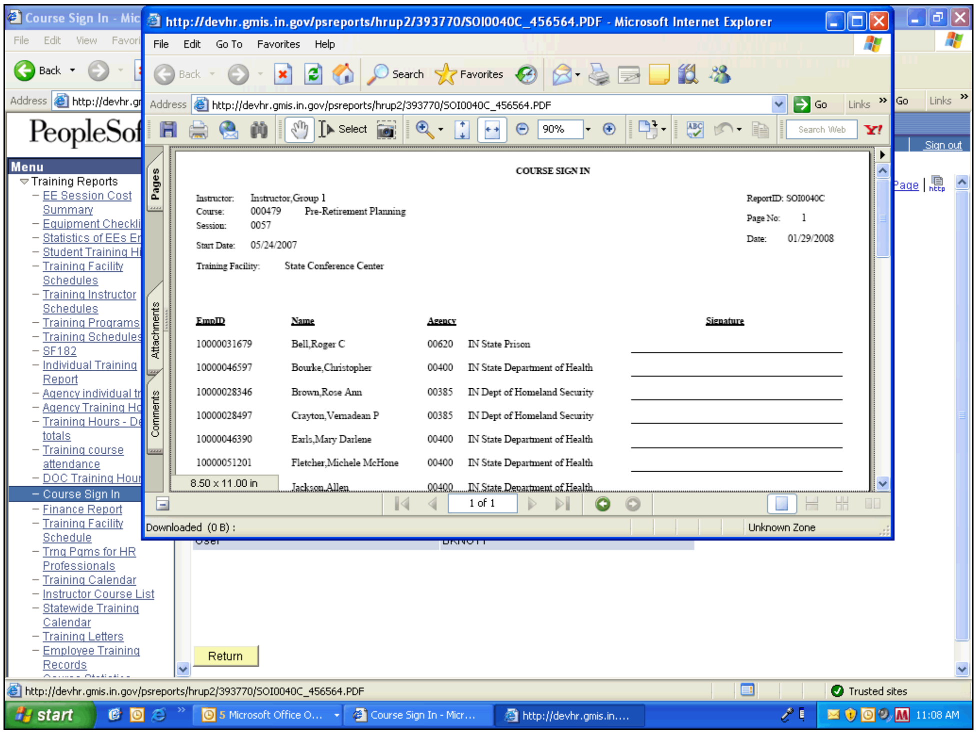
Step	Action
14.	Click the **Refresh** button. **Note:** The **Refresh** button will need to be clicked until the **Run Status** column indicates **Success** and **Distribution Status** column indicates **Posted**. The **Refresh** button may need to be clicked several times. Refresh
15.	Click the **Details** link for the most recent report. **Note:** The most recent report is always located at the top of the list. Details



Step	Action
16.	Click the **View Log/Trace** link. View Log/Trace



Step	Action
17.	Locate the report in the **Name** column. Click the **SOI0040C_456565.PDF** link. **Note:** The report is indicated by the .PDF file extension. SOI0040C_456564.PDF



Step	Action
18.	Click the **Maximize/Restore** button to enlarge the **course sign in** sheet. 
19.	Click the MicroSoft **File** menu option to select **print** from the list of values. This will allow the **course sign in** sheet to be printed. File
20.	**End of Procedure.**

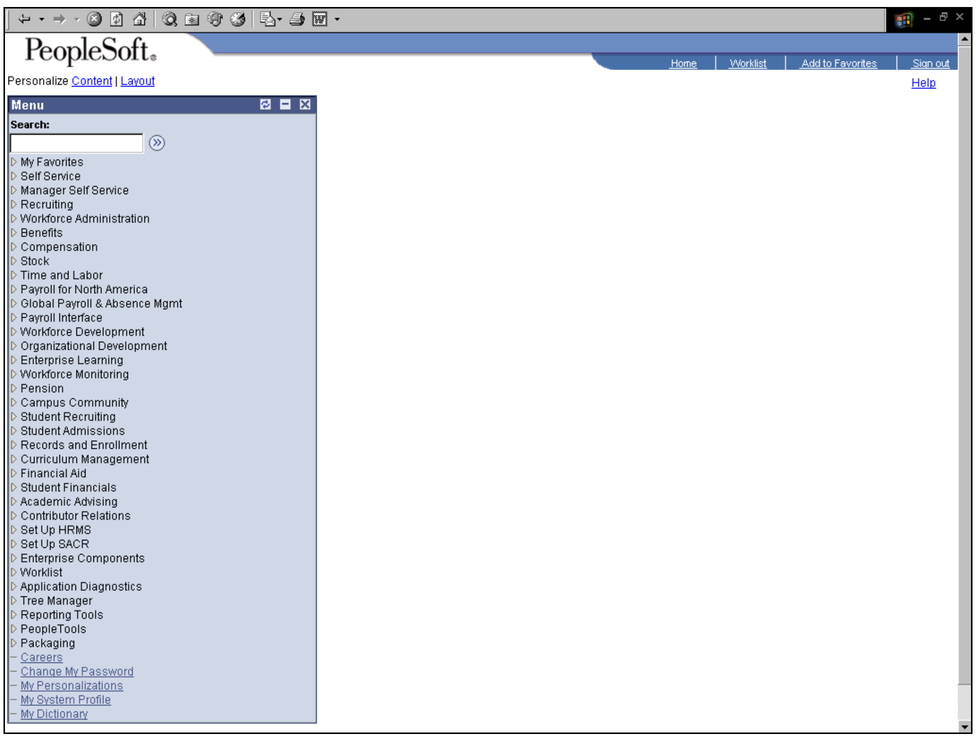
Creating a Course Session Roster

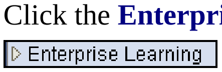
Once you have enrolled the students in a **Course Session,** you may print out the **Course Session Roster** for that session, which can be used for a **Sign-In Sheet**.

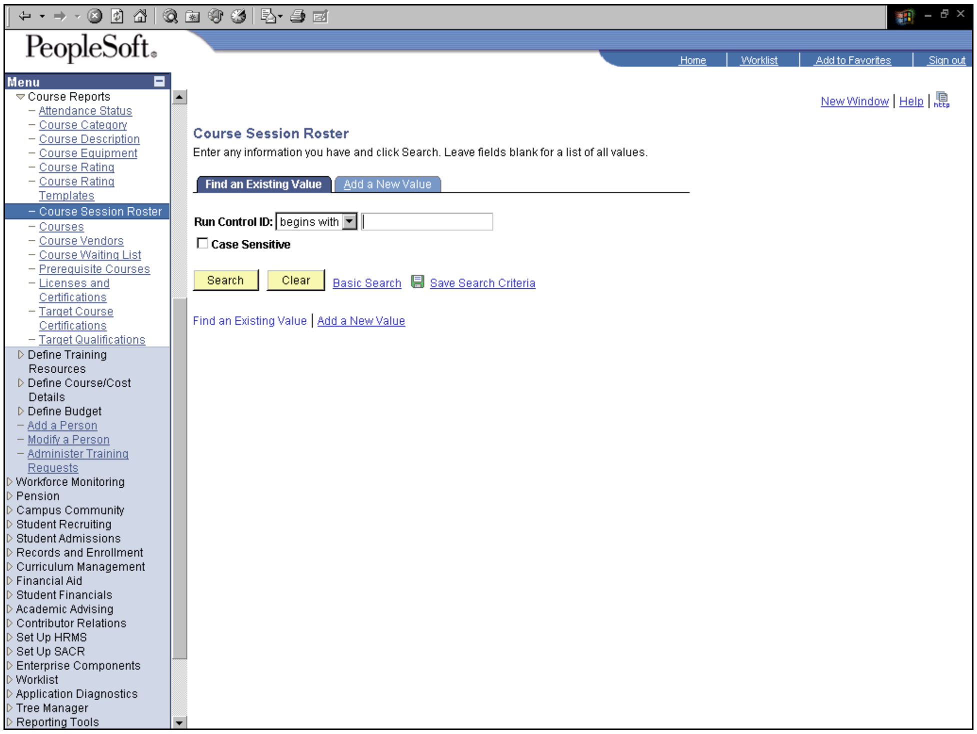
NOTE: Once the **Session Status** has been changed to **Completed,** you will no longer be able to print the **Course Session Roster** for that session.

In this example, we will print the **Course Session Roster** for the **Time Management** course session **0001**.

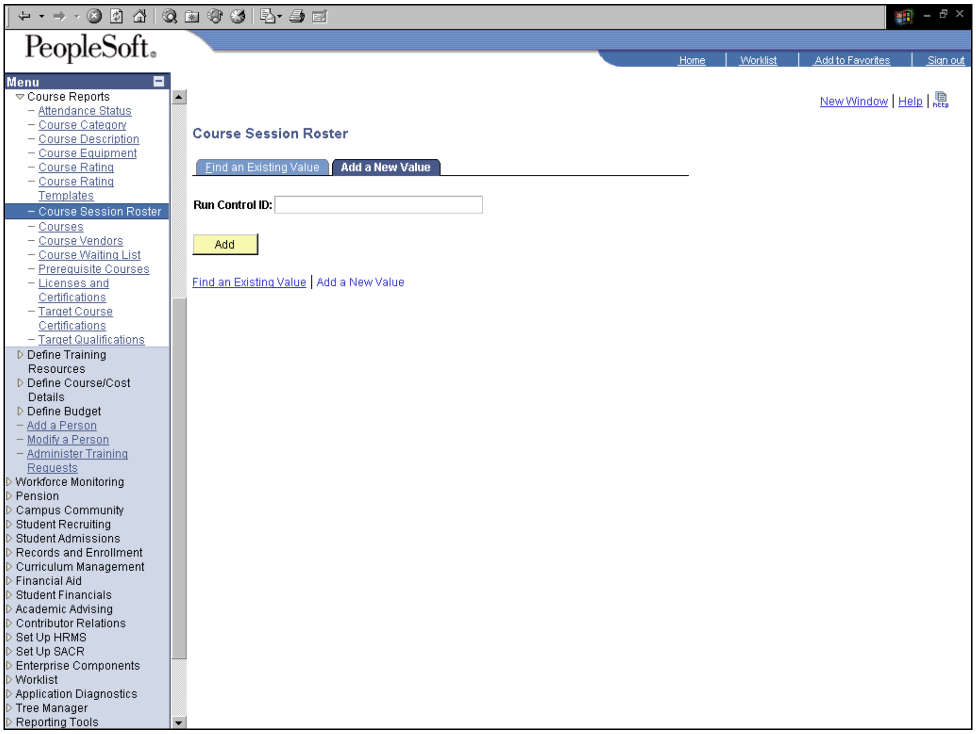
Procedure



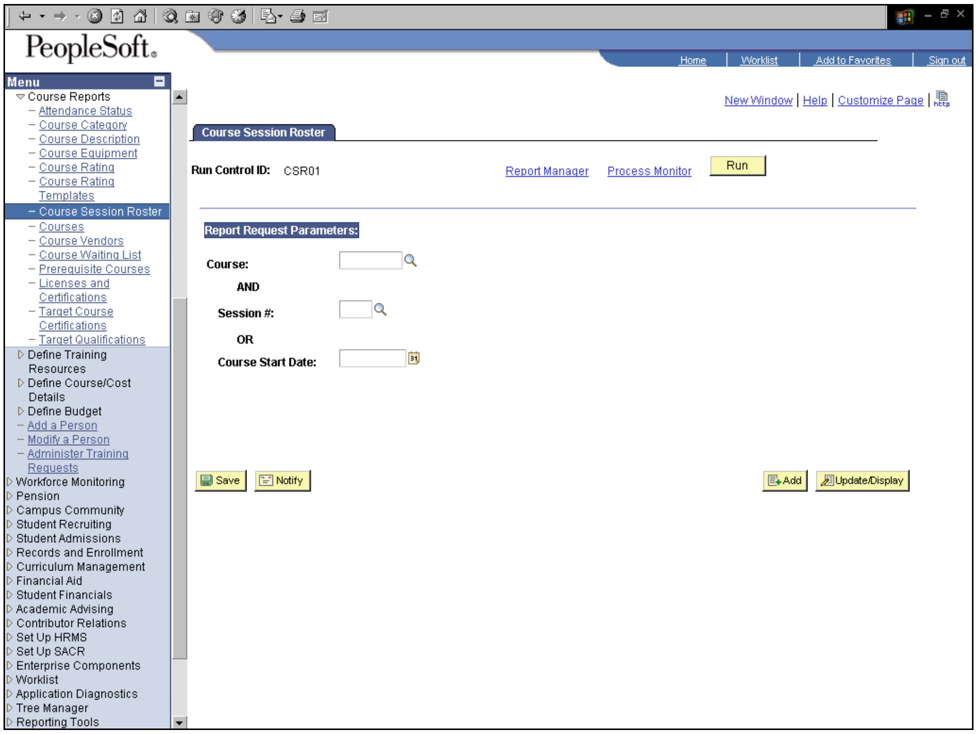
Step	Action
1.	Begin by navigating to the **Course Session Roster** page. Click the **Enterprise Learning** link. 
2.	Click the **Course Reports** link.
3.	Click the **Course Session Roster** link.

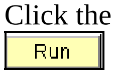


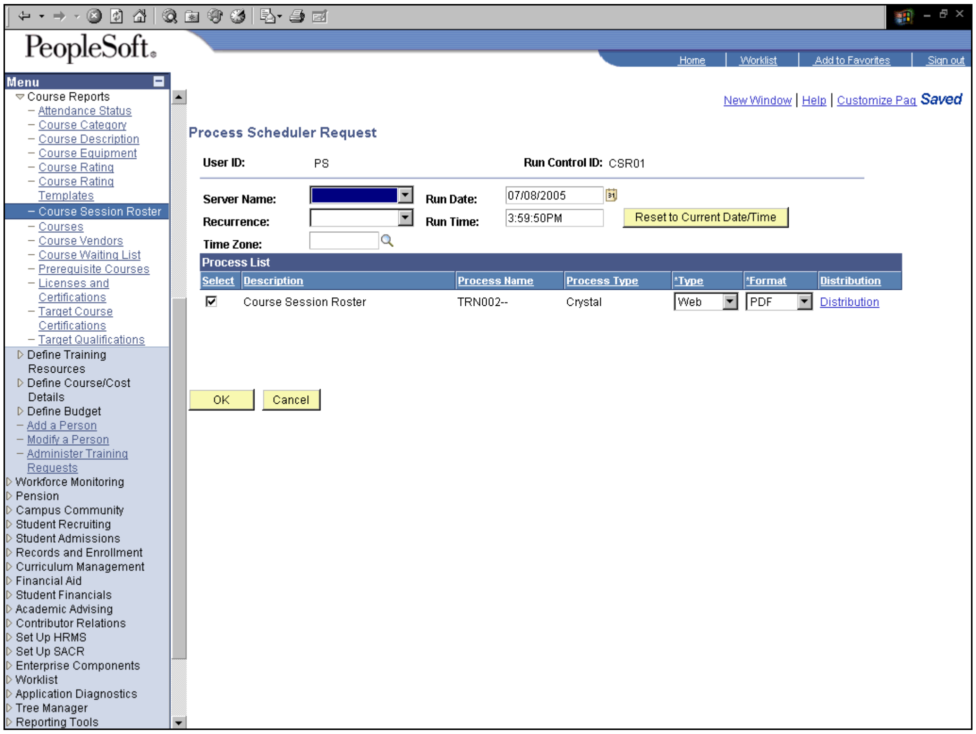
Step	Action
4.	You will need to **Find an Existing** or **Add a New Value** for **Run Control ID.** We are going to **Add a New Value.**

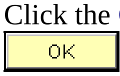


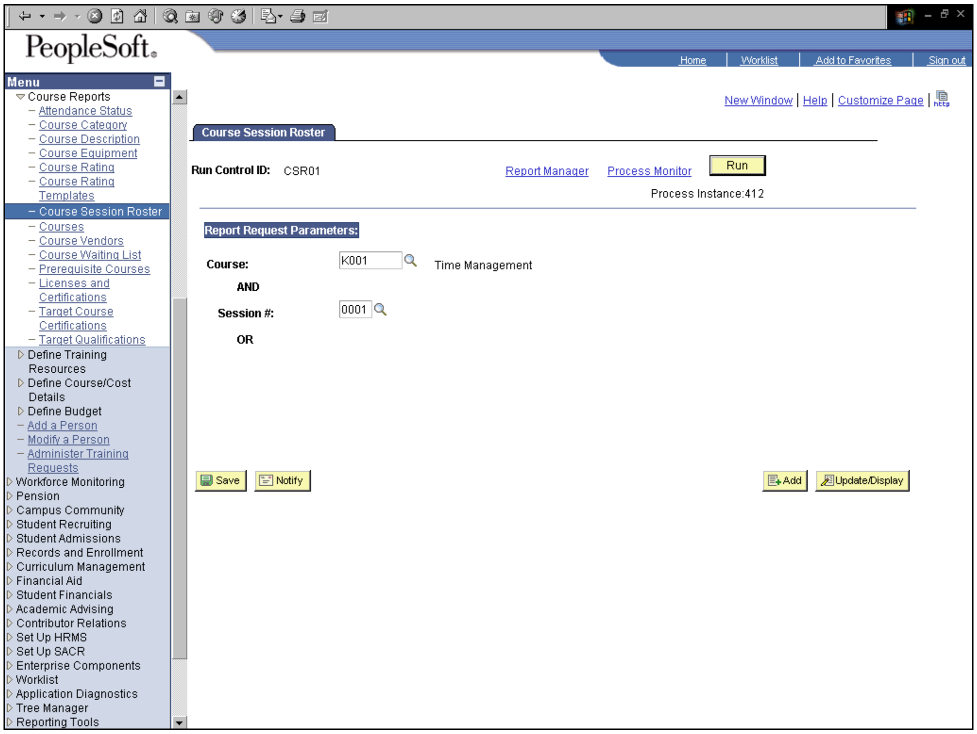
Step	Action
5.	Enter the desired information into the **Run Control ID** field.
6.	Click the **Add** button. 
7.	Use the **Course Session Roster** page to define report parameters such as the course name, session number, and session start date.



Step	Action
8.	Enter your **Course** number.
9.	Click in the **Session #** field. 
10.	In the **Session #** field, specify the course session number for which you want to run the report. Alternatively, specify the beginning date of the course in the **Course Start Date** field.
11.	Click the **Run** button. 
12.	Use the **Process Scheduler Request** page to specify the parameters that are used when running the report.



Step	Action
13.	Select **Web** from the **Type** list. 
14.	Select format **PDF.** 
15.	By clicking **OK,** you will submit the process to create the **Course Session Roster** for this session. Click the **OK** button. 



Step	Action
16.	Notice a process instance number is displayed. This number is used to identify the process. Use the **Process Monitor** link to retrieve the run status for the **Course Session Roster.** Click the **Process Monitor** link. Process Monitor
17.	Use the **Process List** page to check the status of the process and verify that it is successfully completed
18.	Notice that the **Run Status** for the requested job should be **Success** and the **Distribution Status** should be **Posted.** You may need to click the **Refresh** button multiple times to achieve this result.

	Click the **Details** link in the **Details** column. **NOTE:** The last document you sent to process will appear at the top, if there are several entries listed on the page. On the subsequent pages: Click the **View Log/Trace** link. Click the **PDF** document in the **File List.** When the **Course Session Roster** appears on the screen, you can send it to the printer.

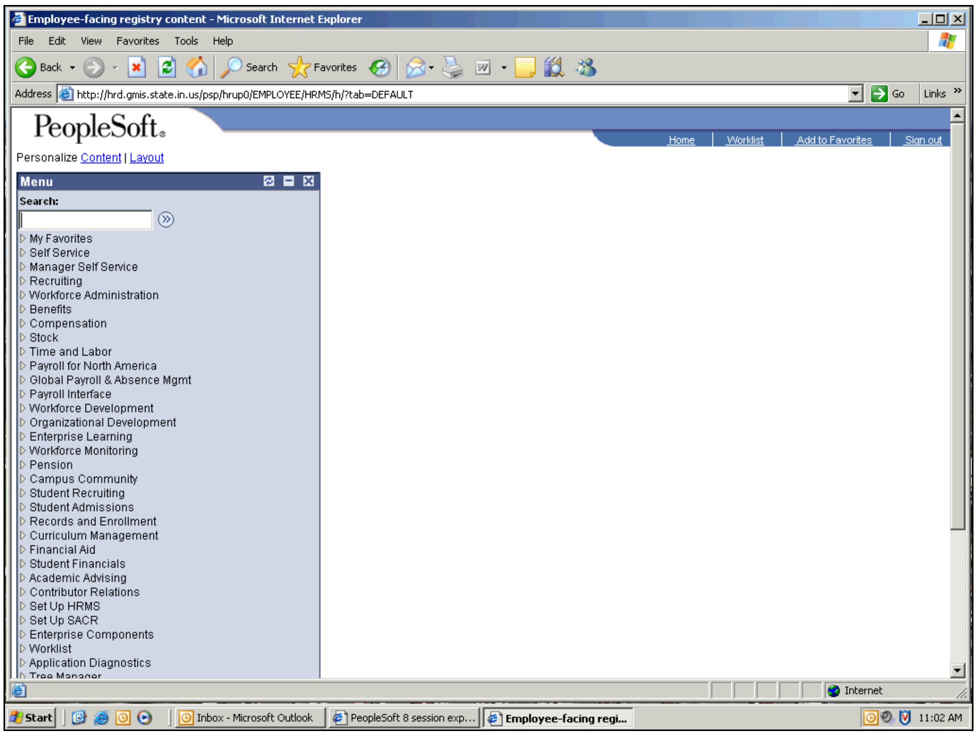
Step	Action
19.	You have successfully created a course session roster. **End of Procedure.**

Closing a Session

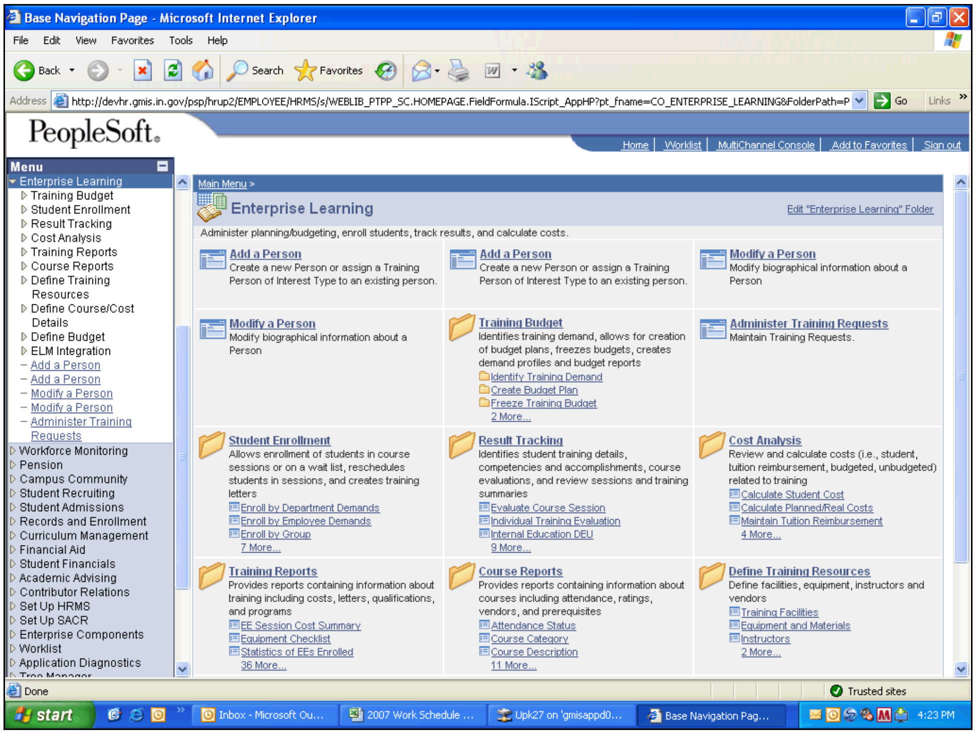
Closing a Course Session

You can set up training sessions for the courses that are designated for internal administration. You specify the session duration, capacity, location, time, instructors, and cost on the **Course Session Profile** page. You can enter, update, or view session status, date, time, and capacity of a course session on this page.

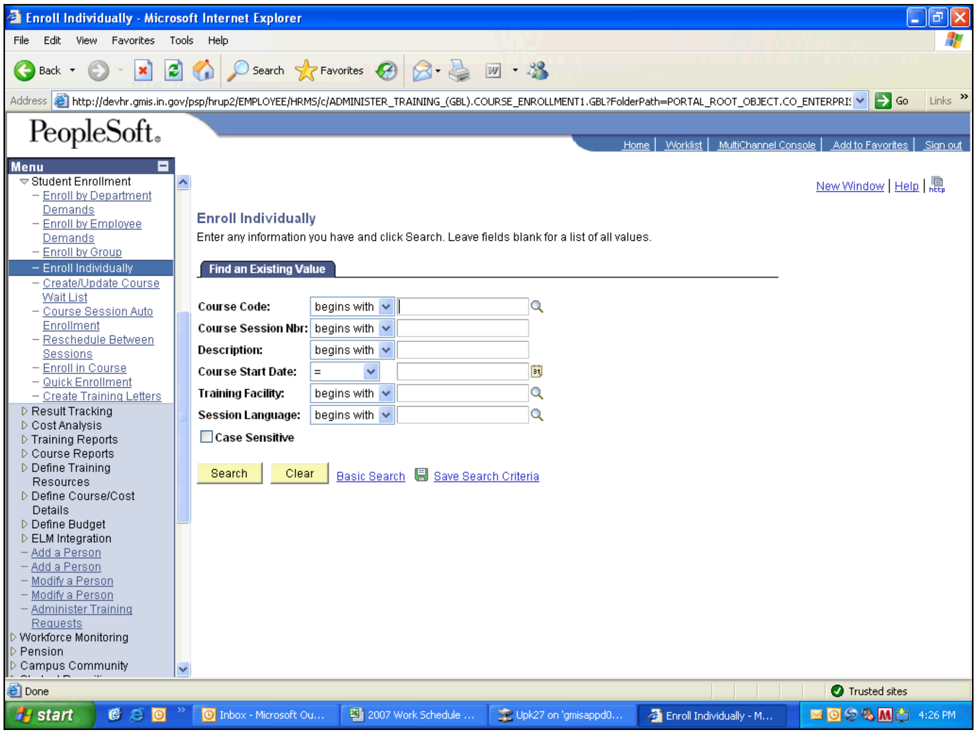
Procedure



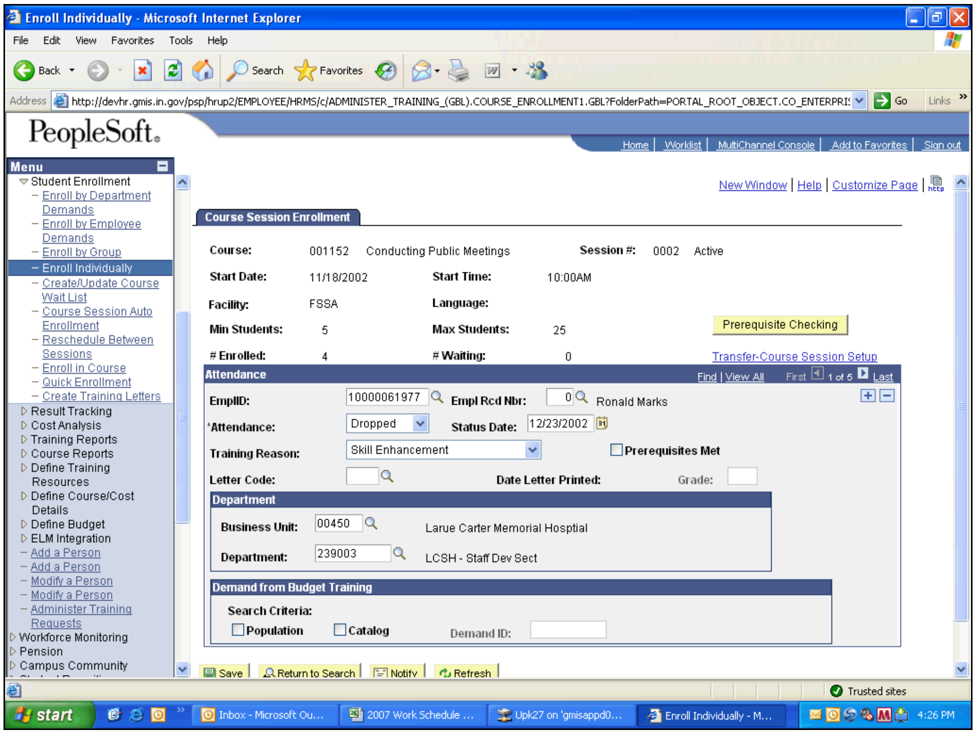
Step	Action
1.	Click the **Enterprise Learning** link. 



Step	Action
2.	Click the **Student Enrollment** link. ▷ Student Enrollment
3.	Click the **Enroll Individually** link. Enroll Individually

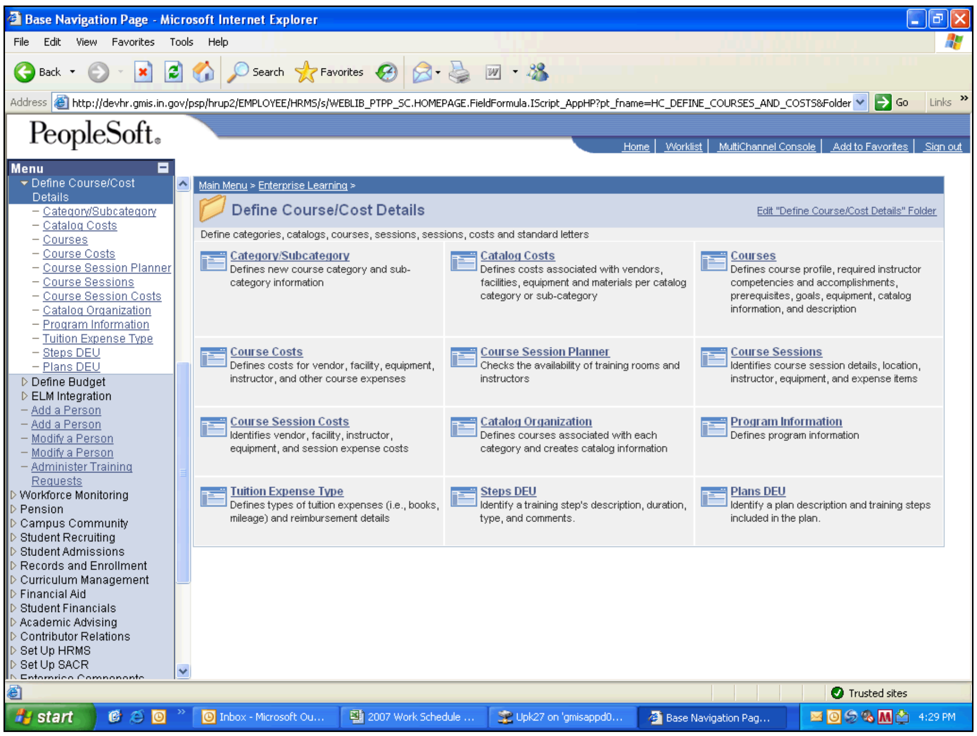


Step	Action
4.	Enter the course code number into the **Course Code** field.
5.	Click in the **Course Session Nbr** field.
6.	Enter the course session number into the **Course Session Nbr** field.
7.	Click the **Search** button. Search

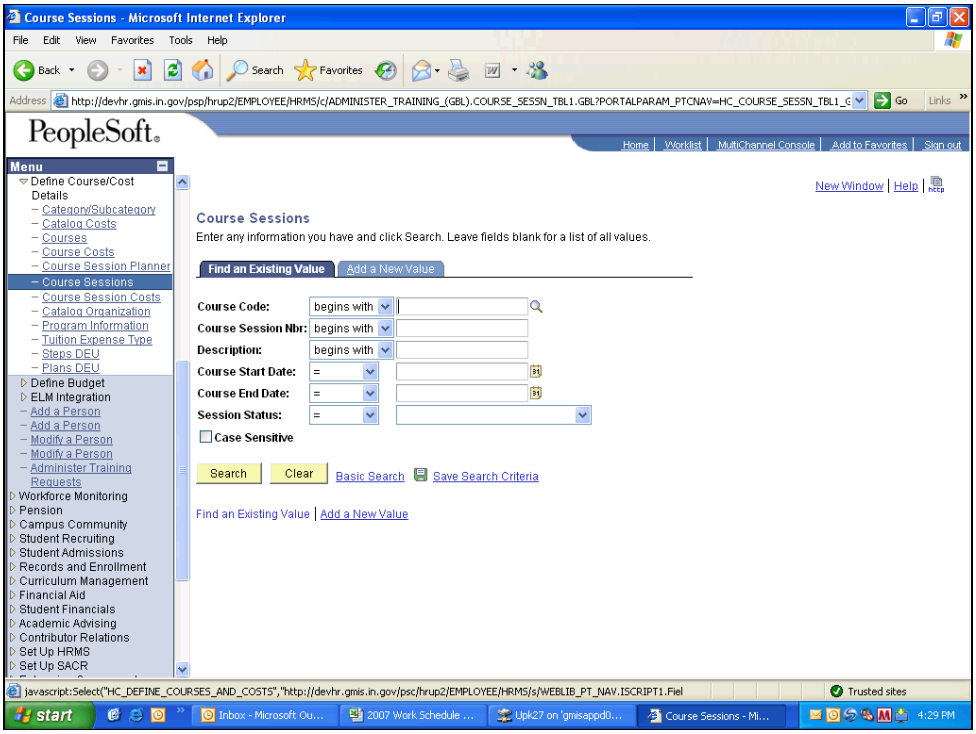


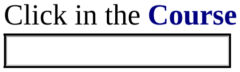
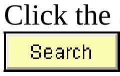
Step	Action
8.	To see all of the employees enrolled in a course, click the **View All** link. View All
9.	Scroll down the page to change the status of the students as required.
10.	Click the **Attendance** drop-down menu button.
11.	Valid values from the list are: **Enrolled:** employees left as enrolled in a course statuses will automatically changed to Completed when the course session is marked as Complete. **Dropped:** the employee notified the training department that they would be unable to attend the training prior to the training start time. **No Show:** the employee did not come to the training and did not contact the training department prior to the training start time. Select **No Show** from the list of values. No Show
12.	Scroll down the page to change the status of the students as required.
13.	Click the **Attendance** drop-down menu button.

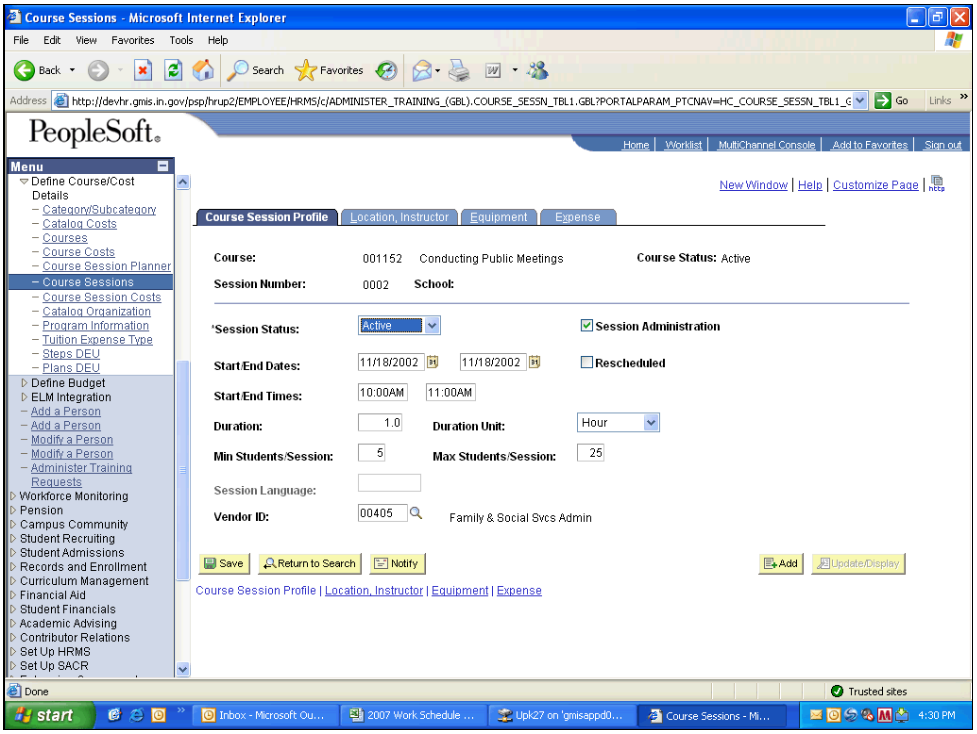
Step	Action
14.	Select **Dropped** from the list of values. Dropped
15.	Once all **Attendance** field statuses have been updated, click the **Save** button. Save
16.	Click the **Define Course/Cost Details** link. Define Course/Cost Details



Step	Action
17.	Click the **Course Sessions** link. Course Sessions



Step	Action
18.	Enter the course code number into the **Course Code** field.
19.	Click in the **Course Session Nbr** field. 
20.	Enter the course session number into the **Course Session Nbr** field.
21.	Click the **Search** button. 

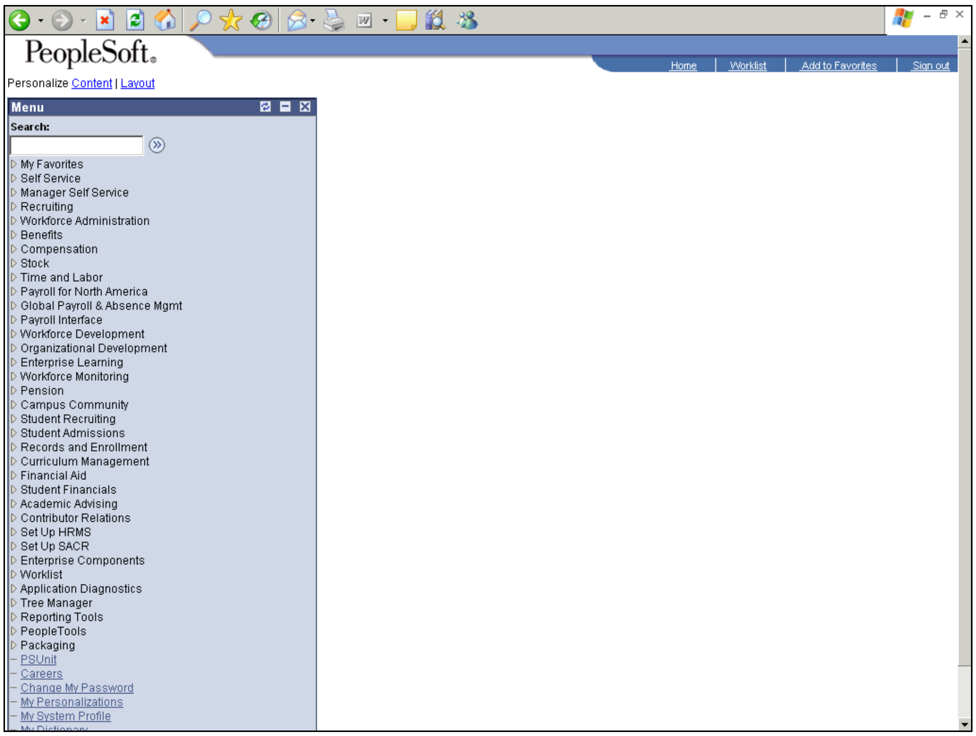


Step	Action
22.	Click the **Session Status** drop-down menu button. 
23.	Select **Complete** from the list of values. Complete
24.	Click the **Save** button. 
25.	You have successfully closed a course session. **End of Procedure.**

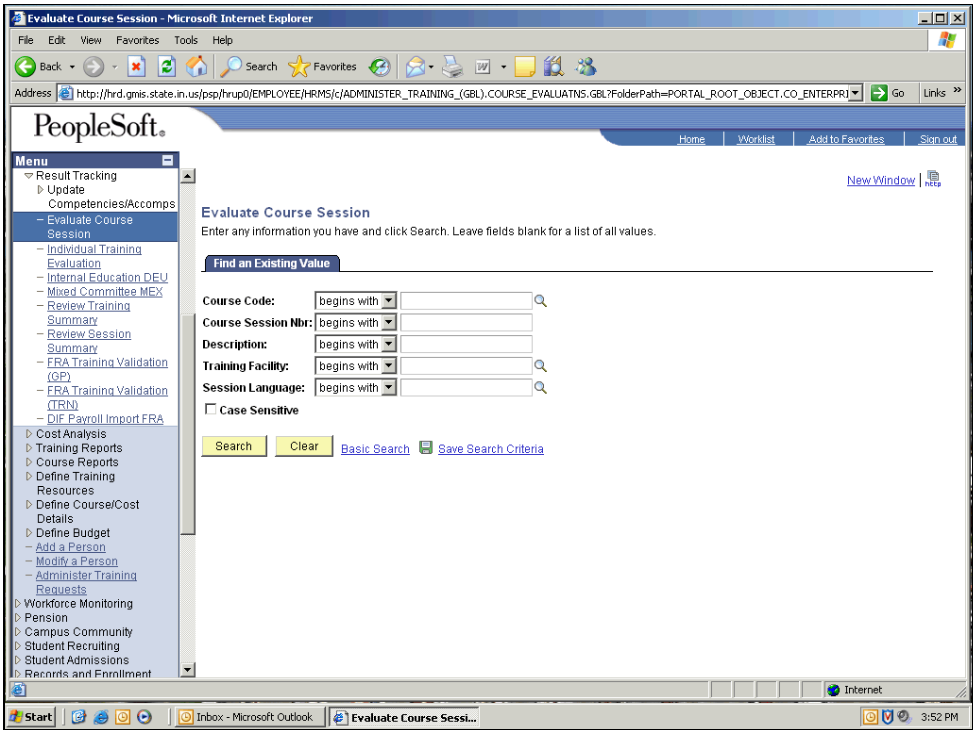
Evaluate a Course Session

Procedure

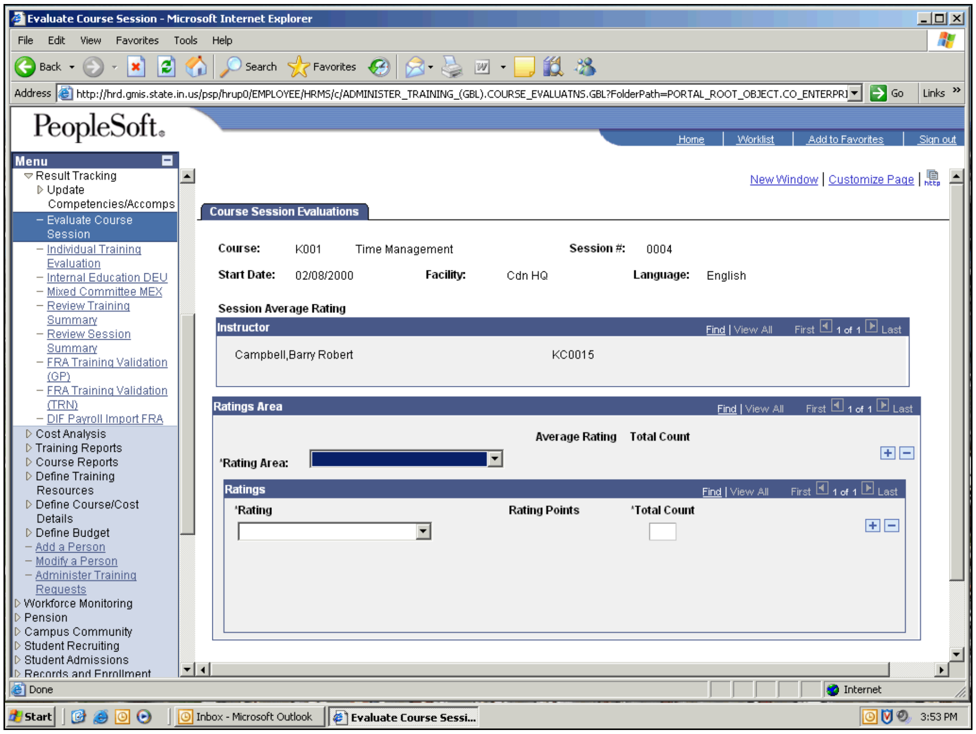
Use the **Evaluate Course Session** page to record student feedback on course sessions so that you know what areas need improvement. You can track course ratings for areas such as training facilities, instructors, course content, materials, and presentation. You can also review session statistics, including the number of responses per rating, average ratings, and the overall average for the session. Ratings can be entered only after you've marked the session **"Completed".**



Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning
2.	Click the **Result Tracking** link. ▷ Result Tracking
3.	Click the **Evaluate Course Session** link.



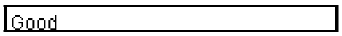
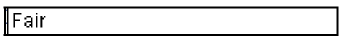
Step	Action
4.	Enter the desired information into the **Course Code** field.
5.	Enter the desired information into the **Course Session Nbr** field.
6.	Click the **Search** button. 



Step	Action
7.	In the **Ratings Area** you will need to follow the **Standard Rating Form** format and add rows of data to capture the correct information. The five areas are **Content, Facility, Instructors, Materials**, and **Presentation.** **Important**: Always remember to click the Plus Sign **(+)** before entering the ratings for your next area. Click the ***Rating Area** list.
8.	Click an entry in the list. Content
9.	Click the ***Rating** list.
10.	In the **Rating** field, select the appropriate rating: **Excellent, Good, Fair, or Poor.** Click an entry in the list. Excellent
11.	In the **Total Count Field**, enter the number of students who selected the rating. The system computes the **Rating Points** assigned to each rating. Enter the desired information into the ***Total Count** field.
12.	Click the **Add a new row at row 1 (Alt+7)** button.

Step	Action
13.	Click the ***Rating** list.
14.	Click an entry in the list. Fair
15.	Enter the desired information into the ***Total Count** field.
16.	Once we have completed all the students' ratings for **Content**, add a row to enter the next **Rating Area**. **Important**: Don't forget to click the **Plus Sign (+)** before entering the next **Rating Area**. Click the **Add a new row at row 1 (Alt+7)** button.
17.	Click the ***Rating Area** list.
18.	Click an entry in the list. Facility
19.	Click the ***Rating** list.
20.	Click an entry in the list. Excellent
21.	Enter the desired information into the ***Total Count** field.
22.	Click the **Add a new row at row 1 (Alt+7)** button.
23.	Click the ***Rating** list.
24.	Click an entry in the list. Good
25.	Enter the desired information into the ***Total Count** field.
26.	Click the **Add a new row at row 1 (Alt+7)** button.
27.	Click the ***Rating** list.
28.	Click an entry in the list. Fair
29.	Enter the desired information into the ***Total Count** field.
30.	Click the **Add a new row at row 1 (Alt+7)** button.

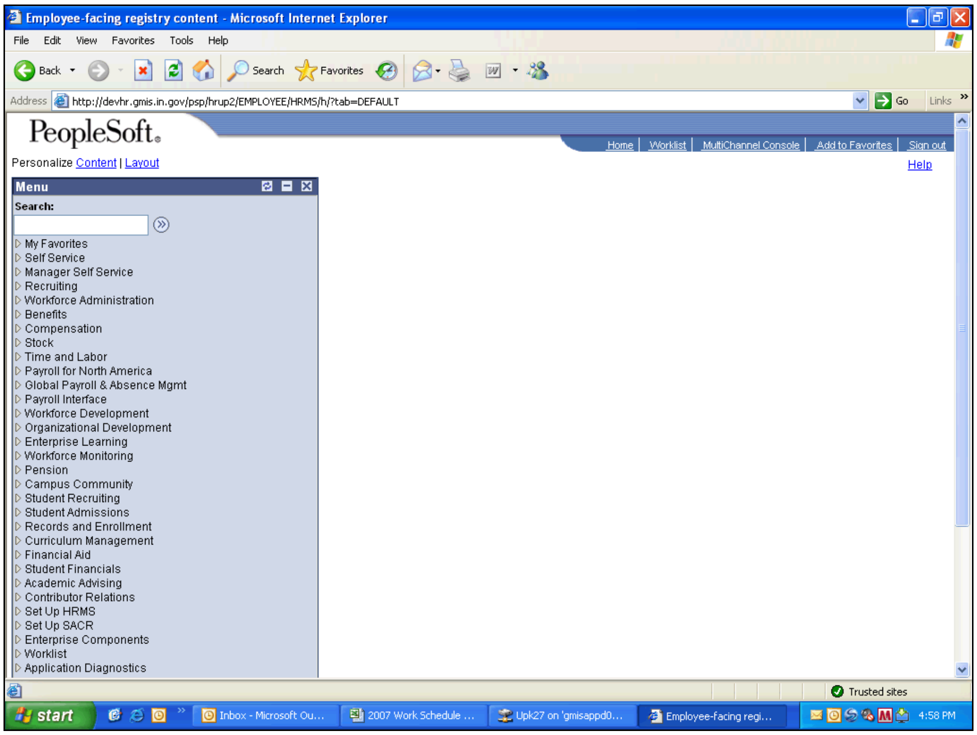
Step	Action
31.	Click the ***Rating Area** list.
32.	Click an entry in the list. Instructors
33.	Click the ***Rating** list.
34.	Click an entry in the list. Excellent
35.	Enter the desired information into the ***Total Count** field.
36.	Click the **Add a new row at row 1 (Alt+7)** button.
37.	Click the ***Rating Area** list.
38.	Click an entry in the list. Materials
39.	Click the ***Rating** list.
40.	Click an entry in the list. Good
41.	Enter the desired information into the ***Total Count** field.
42.	Click the **Add a new row at row 1 (Alt+7)** button.
43.	Click the ***Rating** list.
44.	Click an entry in the list. Fair
45.	Enter the desired information into the ***Total Count** field.
46.	Click the **Add a new row at row 1 (Alt+7)** button.
47.	Click the ***Rating Area** list.
48.	Click an entry in the list. Presentation
49.	Click the ***Rating** list.
50.	Click an entry in the list. Excellent
51.	Enter the desired information into the ***Total Count** field.

Step	Action
52.	Click the **Add a new row at row 1 (Alt+7)** button. 
53.	Click the ***Rating** list. 
54.	Click an entry in the list. 
55.	Enter the desired information into the ***Total Count** field.
56.	Click the **Add a new row at row 1 (Alt+7)** button. 
57.	Click the ***Rating** list. 
58.	Click an entry in the list. 
59.	Enter the desired information into the ***Total Count** field.
60.	Click the scrollbar.
61.	Once you have entered all the ratings save your information. After you click the save button the system will calculate the overall session rating average. Click the **Save (Alt+1)** button. 
62.	Click the scrollbar.
63.	Notice the **Session Average Rating** field has updated. You can also view individual **Rating Areas** by using the **Arrow** or **View All** keys located in the **Ratings Area**.
64.	**End of Procedure.**

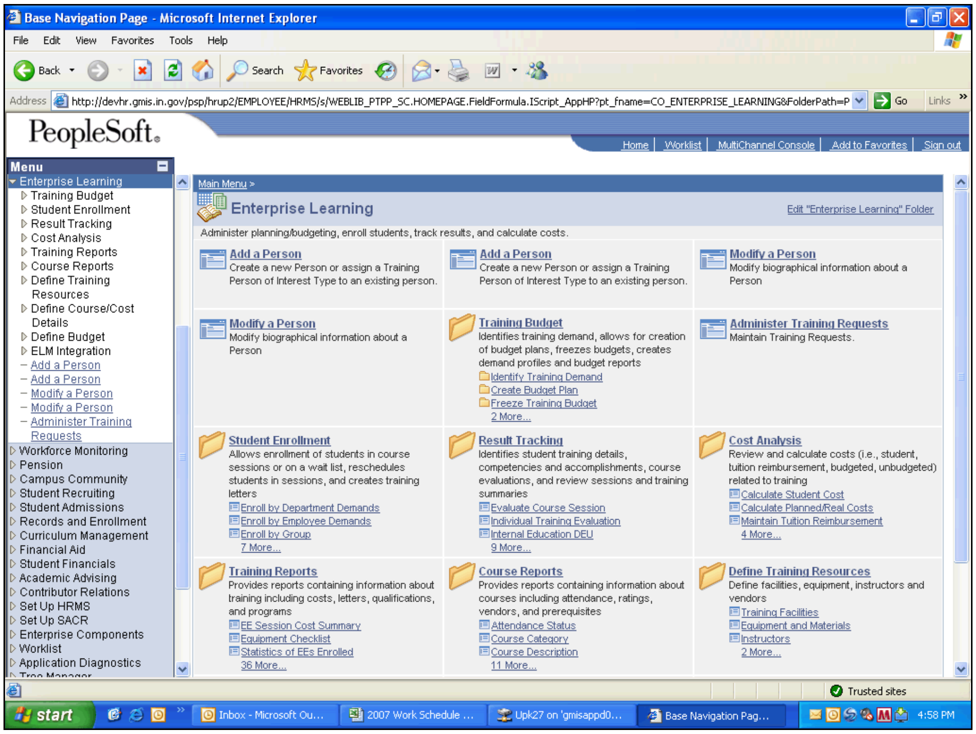
Reviewing Training Records

Viewing Course Session Summary

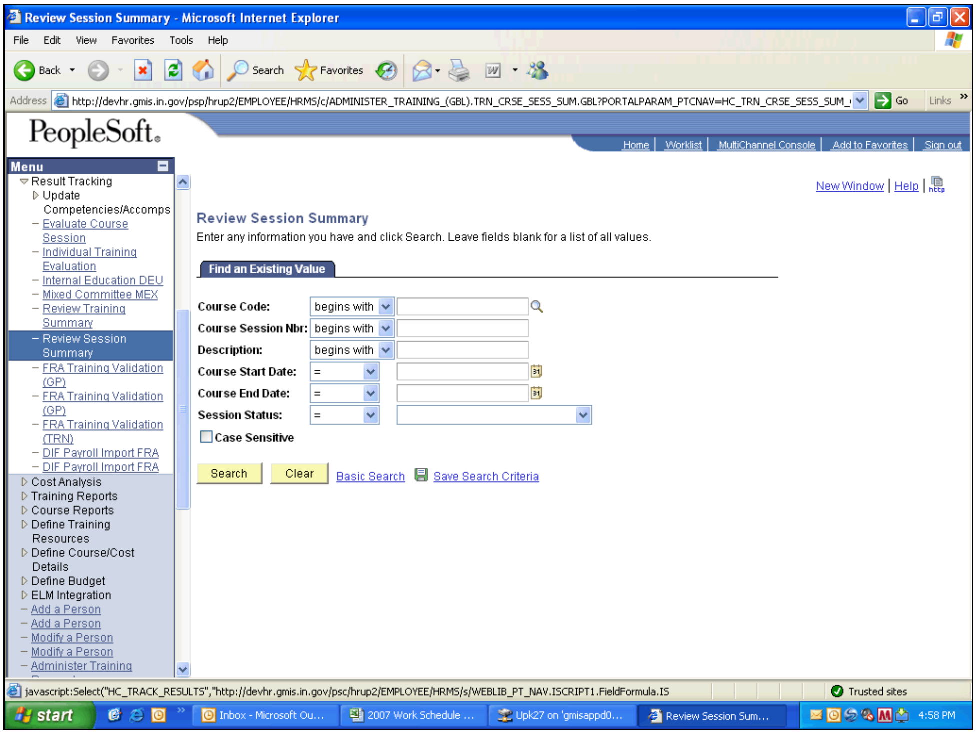
Procedure

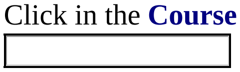
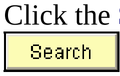


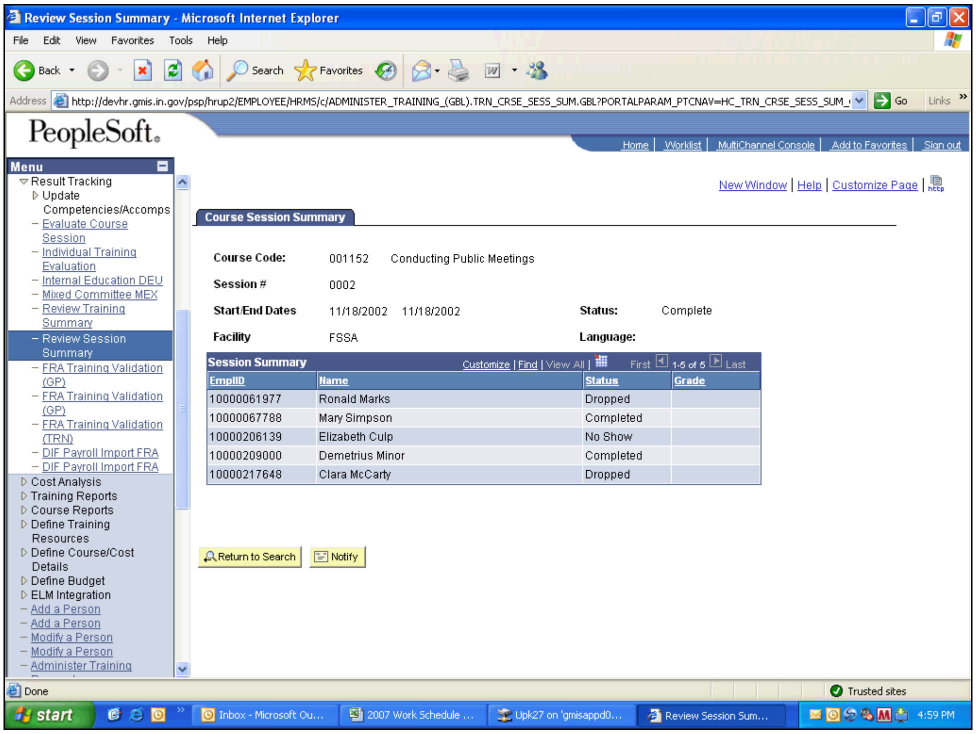
Step	Action
1.	Click the **Enterprise Learning** link. 



Step	Action
2.	Click the **Result Tracking** link. ▷ Result Tracking
3.	Click the **Review Session Summary** link. Review Session Summary



Step	Action
4.	Enter the course code number into the **Course Code** field.
5.	Click in the **Course Session Nbr** field. 
6.	Enter the course session number into the **Course Session Nbr** field.
7.	Click the **Search** button. 



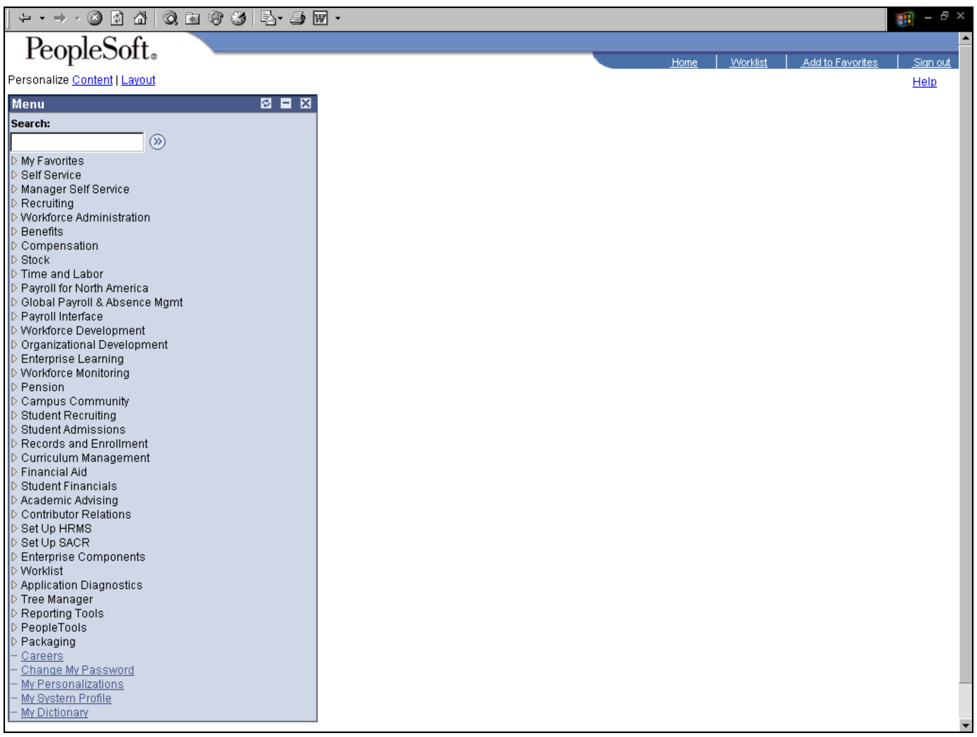
Step	Action
8.	From the **Course Session Summary** page, each employee who attended the course, their attendance status, and the course grade (if applicable) can be viewed. PeopleSoft has a feature that allows for sorting any column that has a live link for a column heading. Click the **Status** link for the course attendance status column. 
9.	Note how the **Status** column sorted course attendance statuses alphabetically. Anytime the **Excel Grid** button is visible in PeopleSoft summaries or reports, the summary or report may be downloaded to a **MicroSoft Excel** spreadsheet by clicking on the button. 
10.	**End of Procedure.**

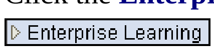
Viewing Student Training Summary

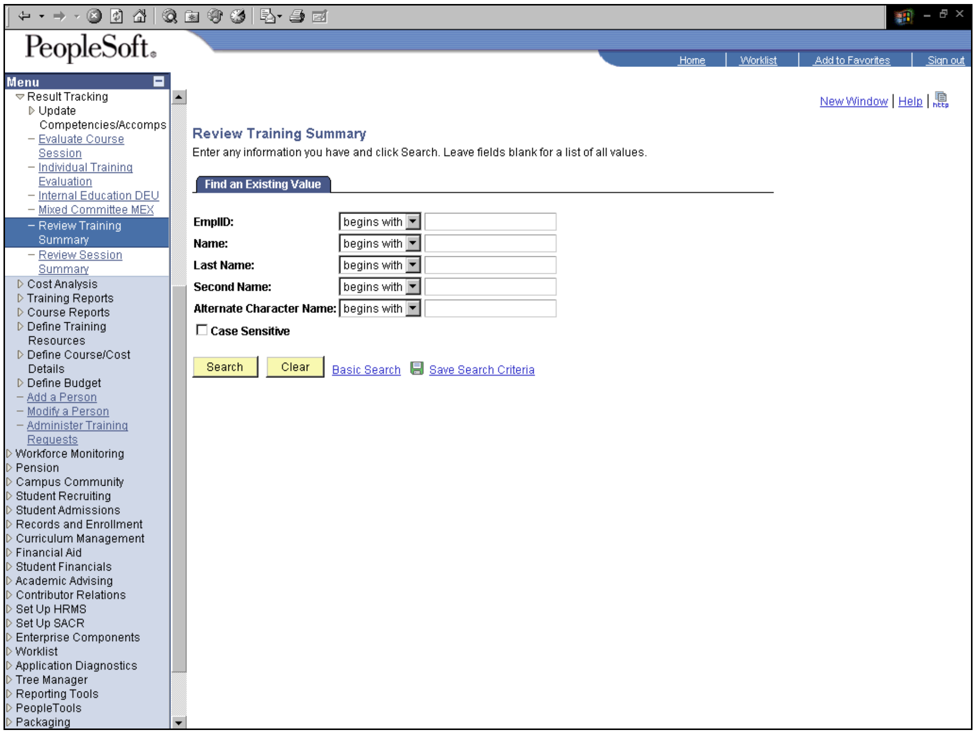
Use the **Review Training Summary** page to view the entire training history for an employee. This information may also be saved to a spreadsheet.

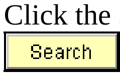
In this example, Martina Griffith's manager wants to know whether she has passed the Performance Management course, which can be done through the **Review Training Summary.**

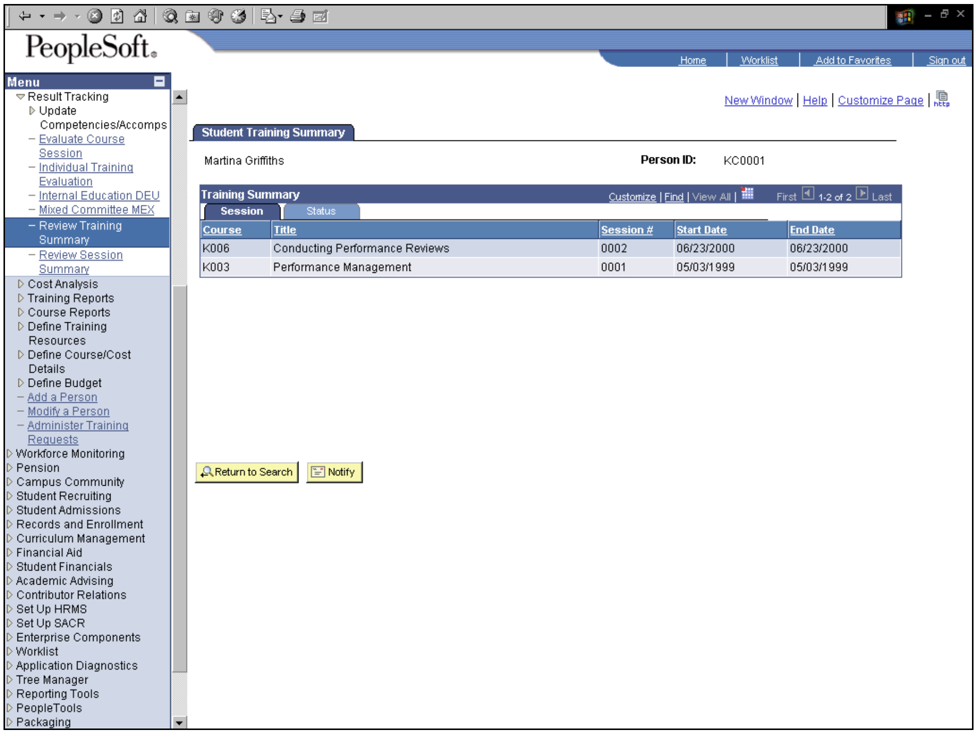
Procedure



Step	Action
1.	Begin by navigating to the **Student Training Summary** page. Click the **Enterprise Learning** link. 
2.	Click the **Result Tracking** link.
3.	Click the **Review Training Summary** link.



Step	Action
4.	Enter the desired information into the **EmplID** field.
5.	Click the **Search** button. 
6.	Use the **Student Training Summary** page to view the summary of a student's training history.



Step	Action
7.	Click the **Status** tab. 
8.	View a student's training history to determine whether the student has completed or passed a course. Notice that Martina has completed the Performance Management course with grade **P**, indicating Passed.
9.	In summary, you view an employee's training summary information to identify the courses that the employee has taken. **End of Procedure.**

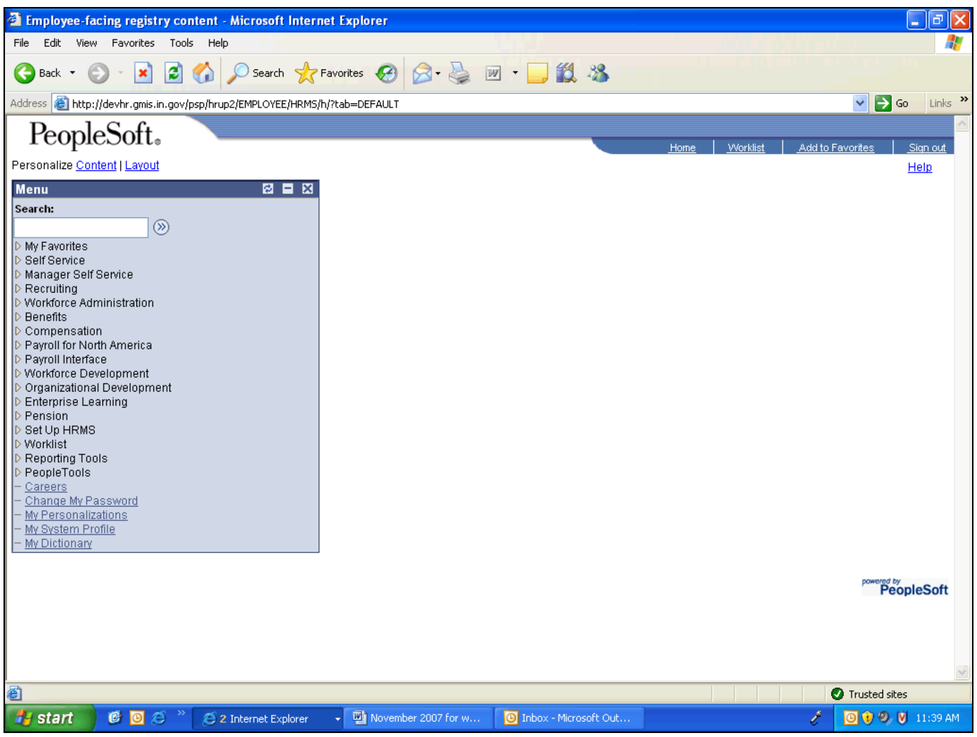
Managing External Training & External Trainees (Non-Employees)

With the Person model, delivered in PeopleSoft 8.9, agencies can continue to track training activities for external trainees, most commonly referred to as non-employees. The Person model allows an employee or non-employee to maintain the same empl id number throughout their activity with the State of Indiana.

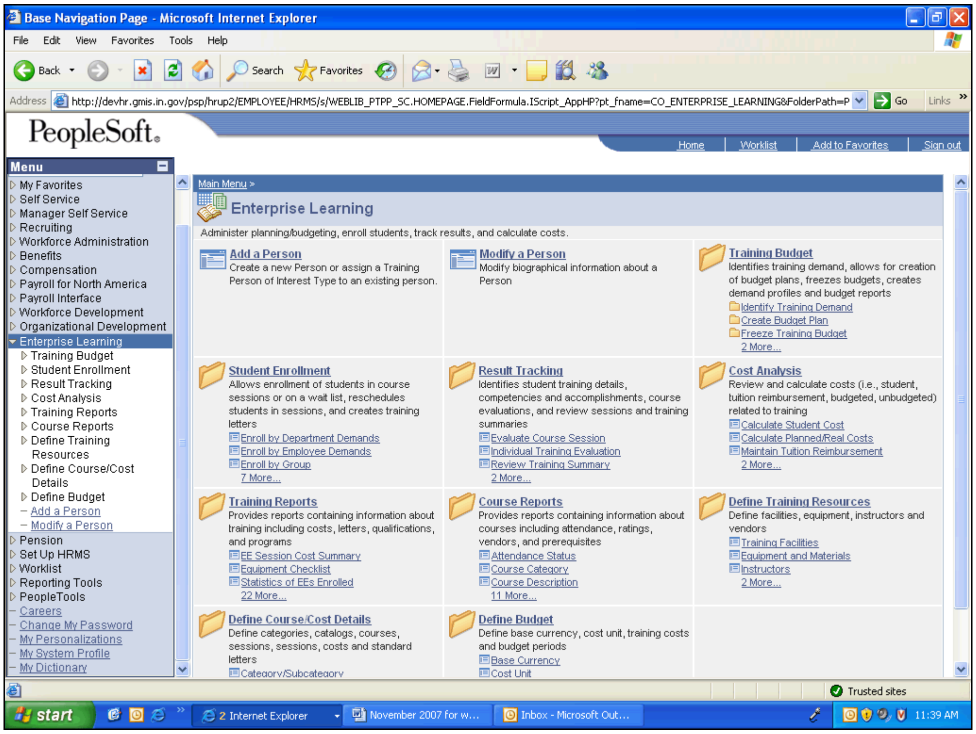
The following instructions highlight how to add a new external trainee (someone who has never had a working relationship with the State of Indiana), and how to manage employees who have entered into a non-employee relationship, or how to change the business unit associated with the non-employee.

Adding External Training Sessions

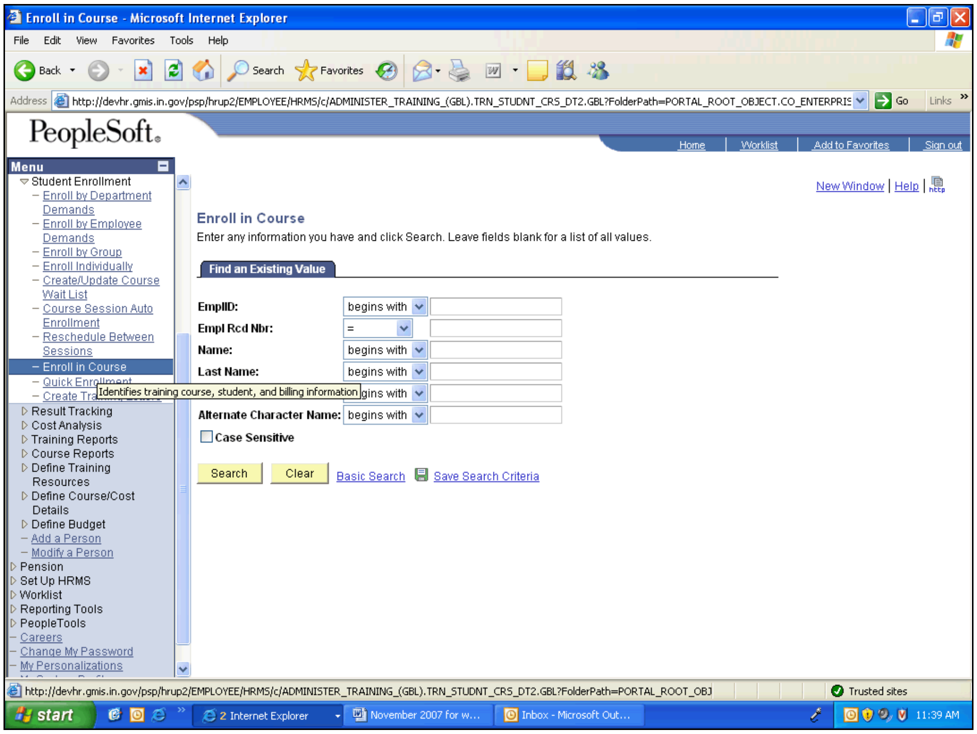
Procedure



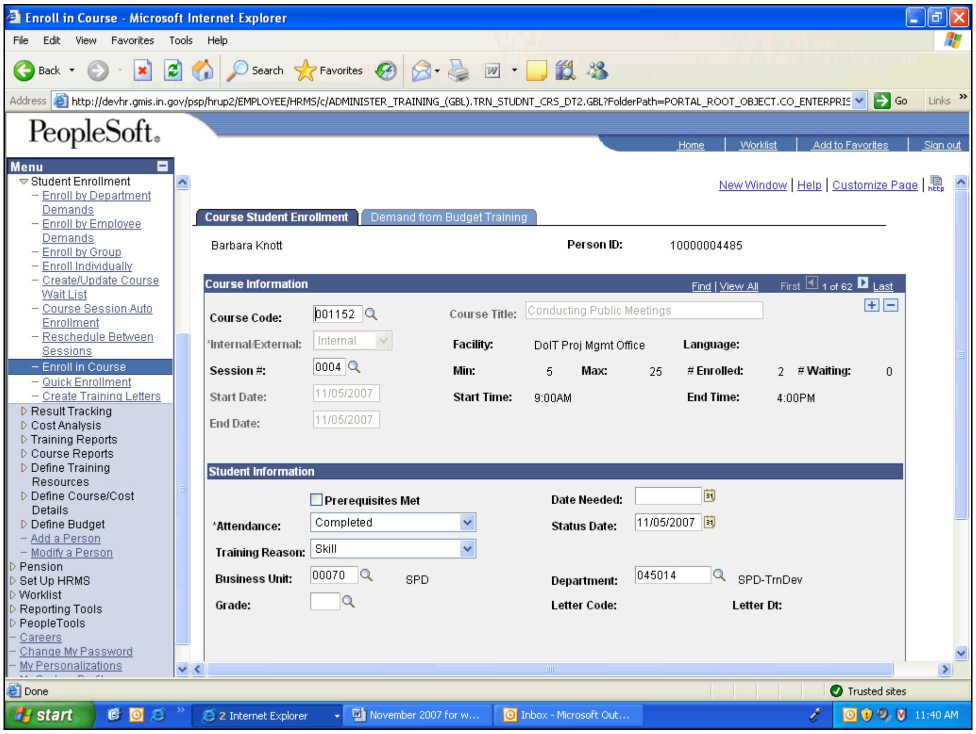
Step	Action
1.	Click the **Enterprise Learning** link. 



Step	Action
2.	Click the **Student Enrollment** link. ▷ Student Enrollment
3.	Click the **Enroll in Course** link. Enroll in Course



Step	Action
4.	Enter the employee ID number into the **Student Enrollment** field.
5.	Click the **Search** button. Search



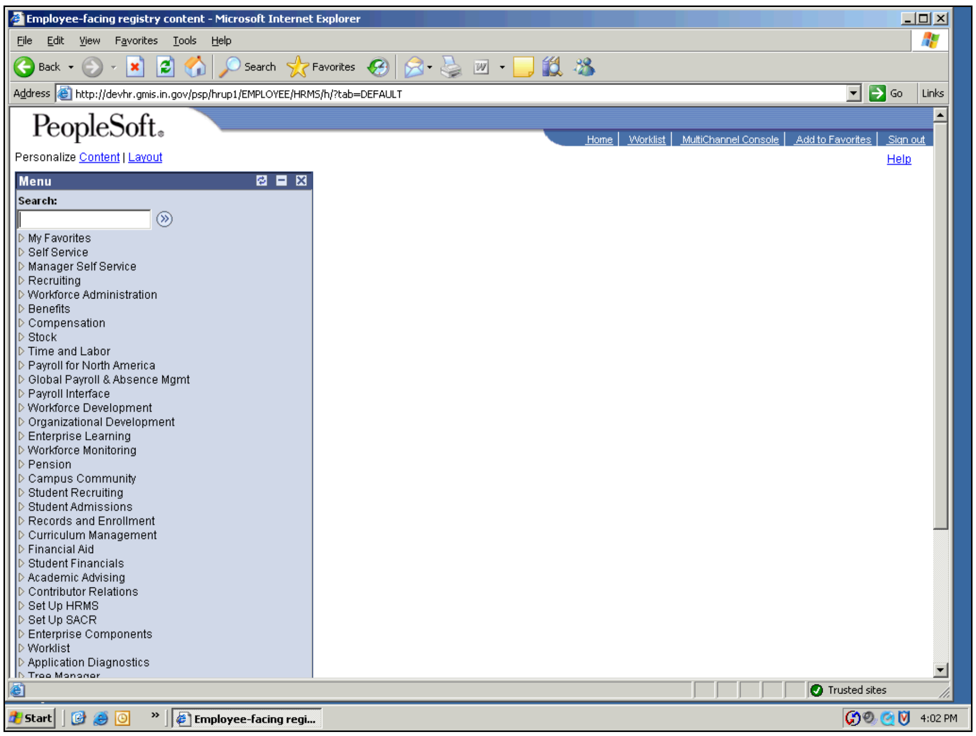
Step	Action
6.	Click the **Add a new row (Alt+7)** button.
7.	Press the **[Tab]** key.
8.	Press the **[Tab]** key.
9.	Enter the name of the course into the **Course Title** field.
10.	Click the **Internal/External** drop-down menu button.
11.	Select **External** from the list of values. External
12.	Click in the **Start Date** field.
13.	Enter the start date into the **Start Date** field.
14.	Press the **[Tab]** key.
15.	Enter the end date into the **End Date** field.
16.	Click in the **School Name** field.
17.	Enter the school name if available into the **School Name** field.
18.	Click the **Attendance** drop-down menu button.

Step	Action
19.	Select **Completed** from the list of values. Completed
20.	Click the **Training Reason** drop-down menu button. 
21.	Select **Skill** from the list of values. Skill
22.	Scroll down the page to locate the **Save** button.
23.	Click the **Save** button. 
24.	**End of Procedure.**

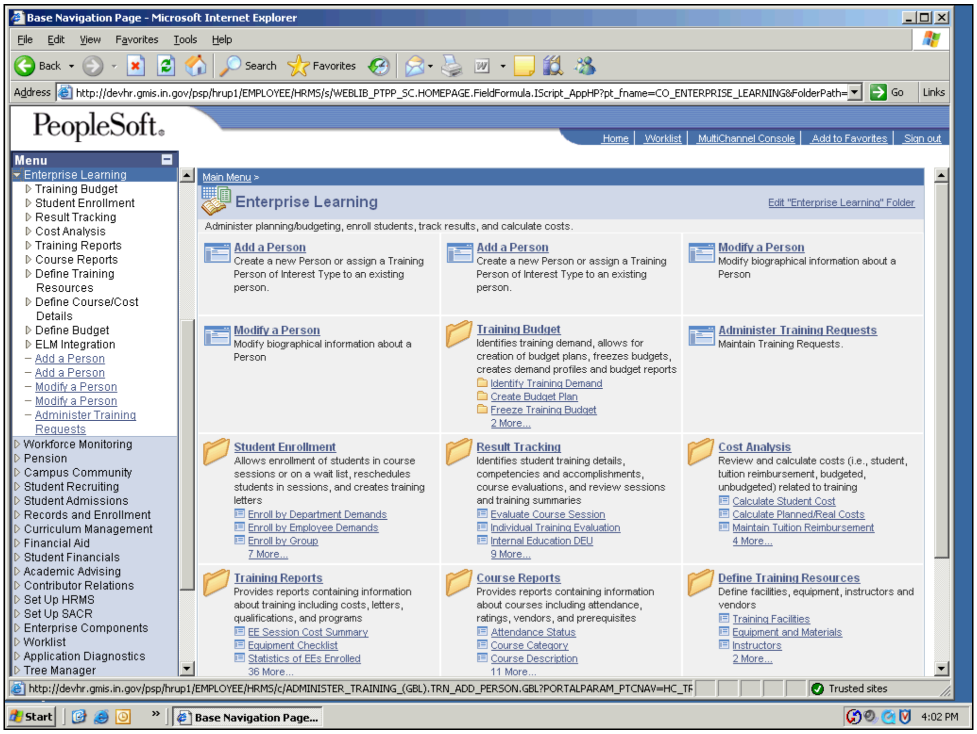
Add an External Trainee

Procedure

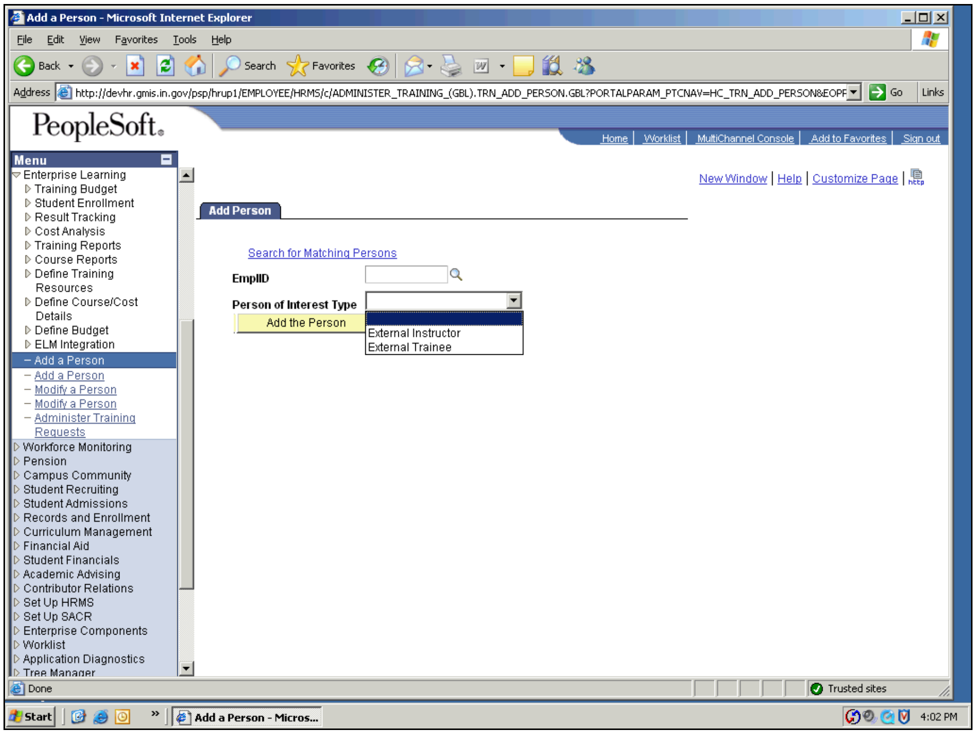
External trainees are contingent employees whose services are retained by the State of Indiana through another company. The vendor and/or contact company employees and pays the external employee.



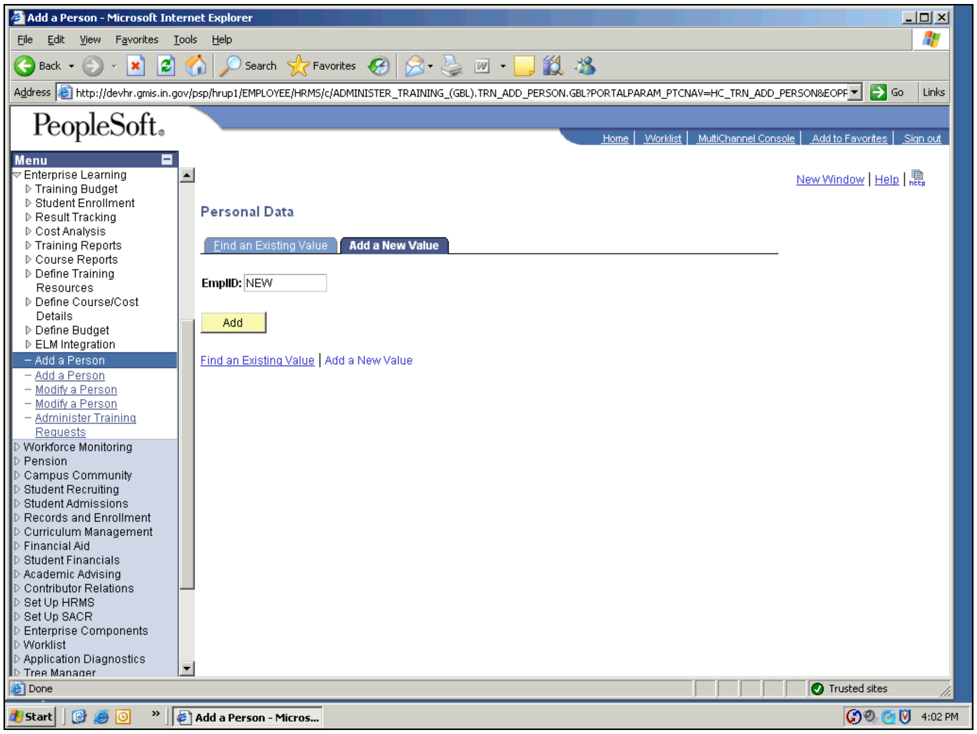
Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning



Step	Action
2.	Click the **Add a Person** link. 

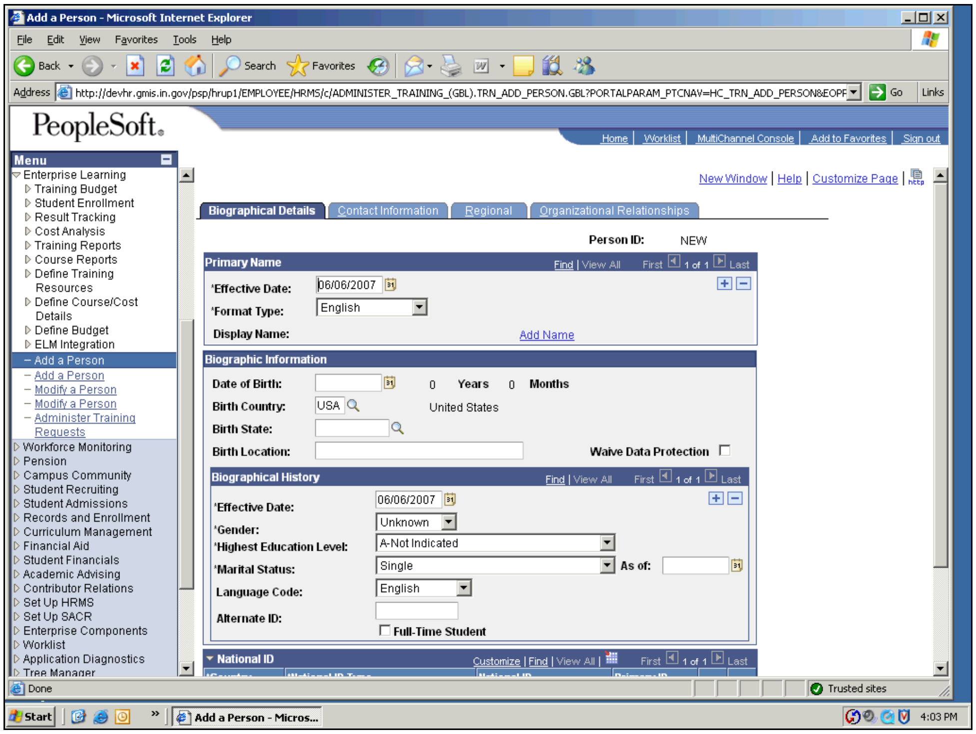


Step	Action
3.	Select **External Trainee** from the list of values. **Note:** The **External Instructor** value may be used to track external training providers. External Trainee
4.	Click the **Add the Person** button. Add the Person

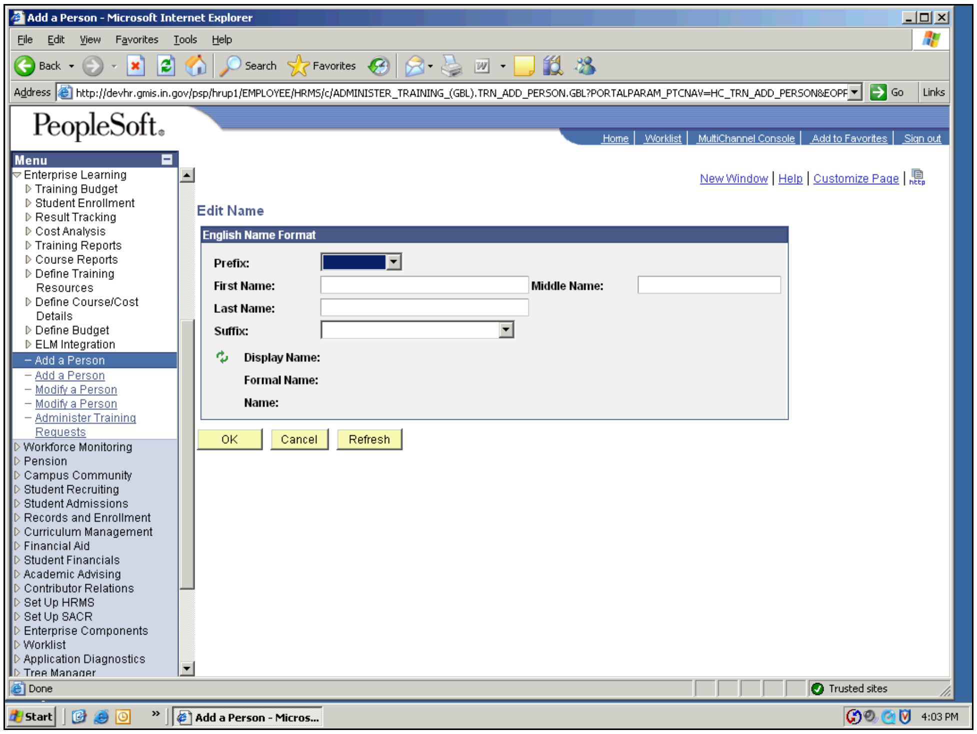


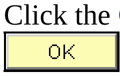
Step	Action
5.	Click the **Add** button. 

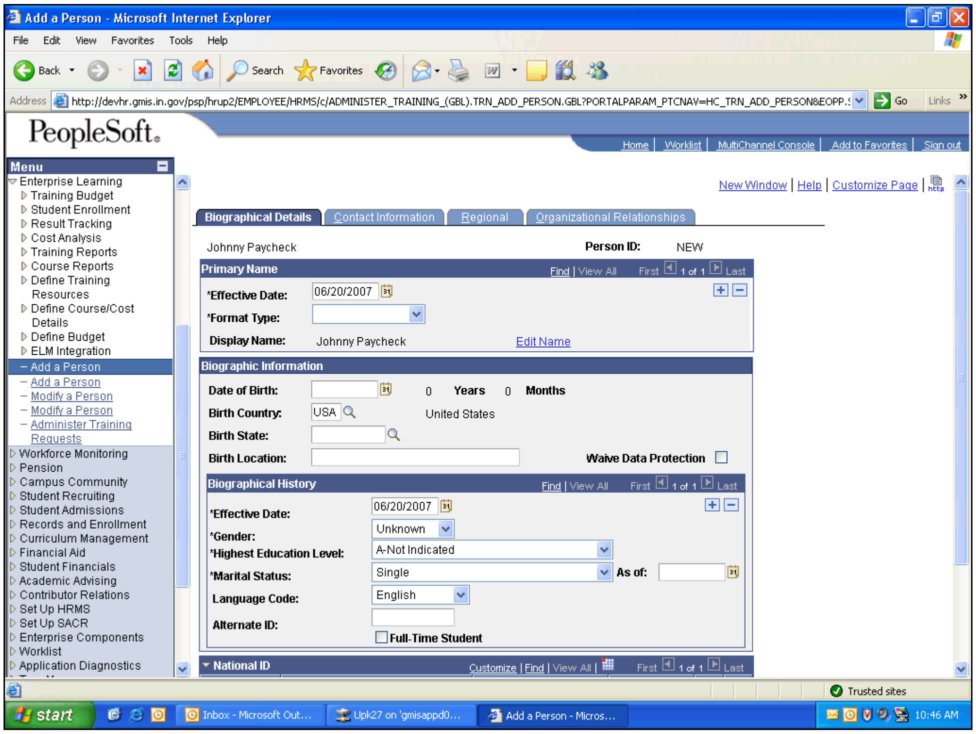
When adding a non-employee, be sure to update the effective date as needed. The effective date **must** reflect the date the non-employee began their contractual relationship with the agency. Failure to record the correct effective date will impact the ability to enroll this person in course sessions. A person (employee, non-employee) must be in an active status on the first date of the session to be enrolled.



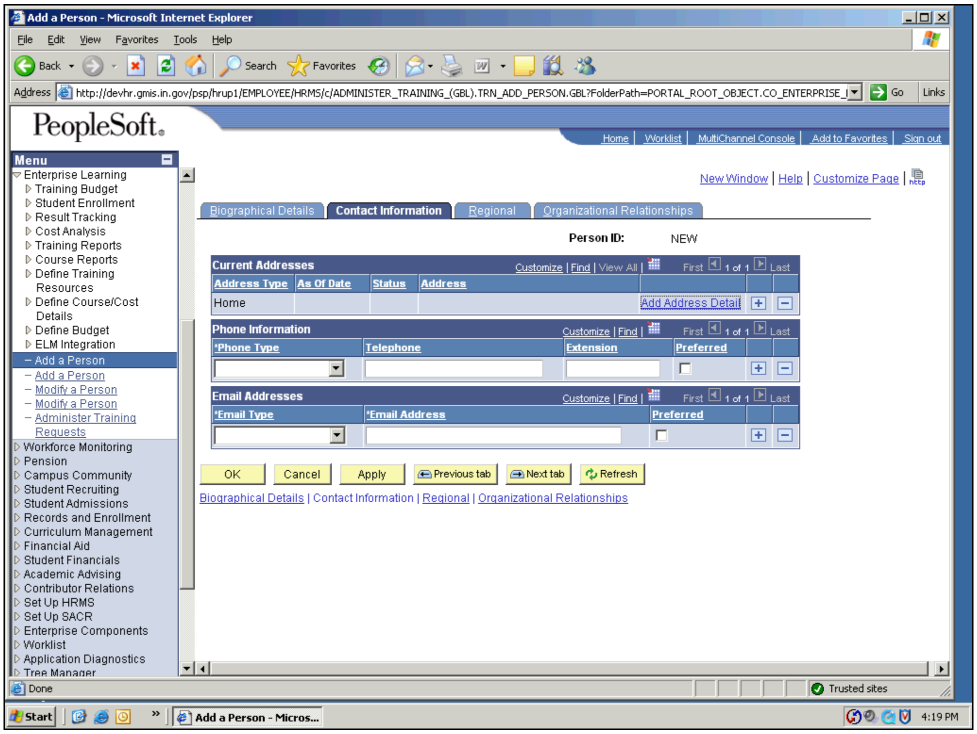
Step	Action
6.	Click the **Add Name** link. Add Name



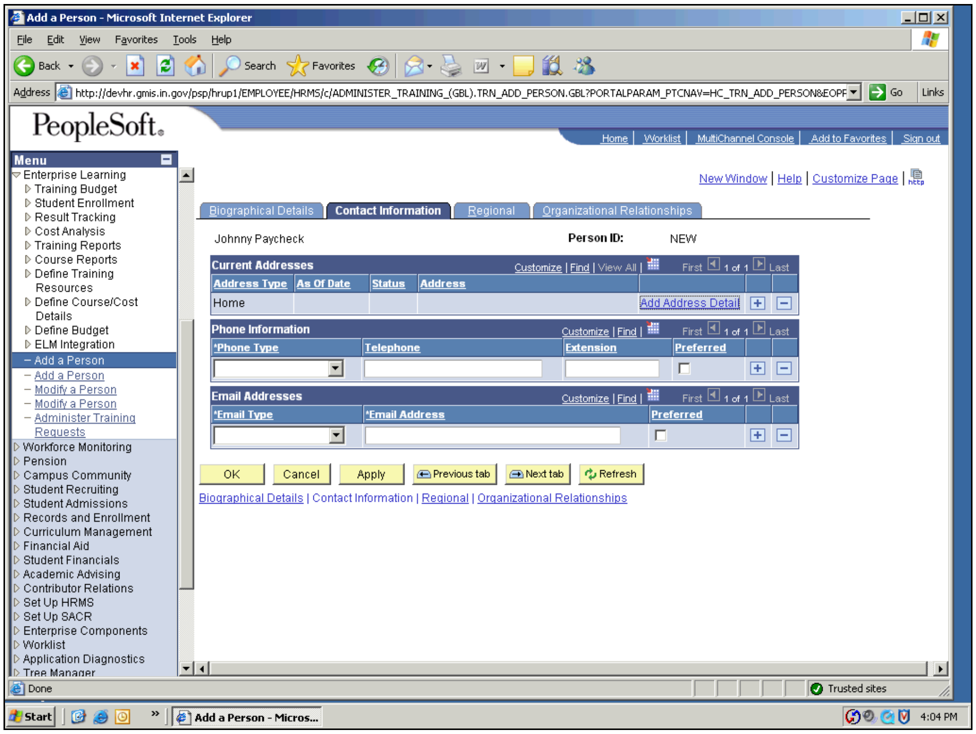
Step	Action
7.	Enter the external trainee's first name into the **First Name** field.
8.	Enter the trainee's last name into the **Last Name** field.
9.	Click the **OK** button. 



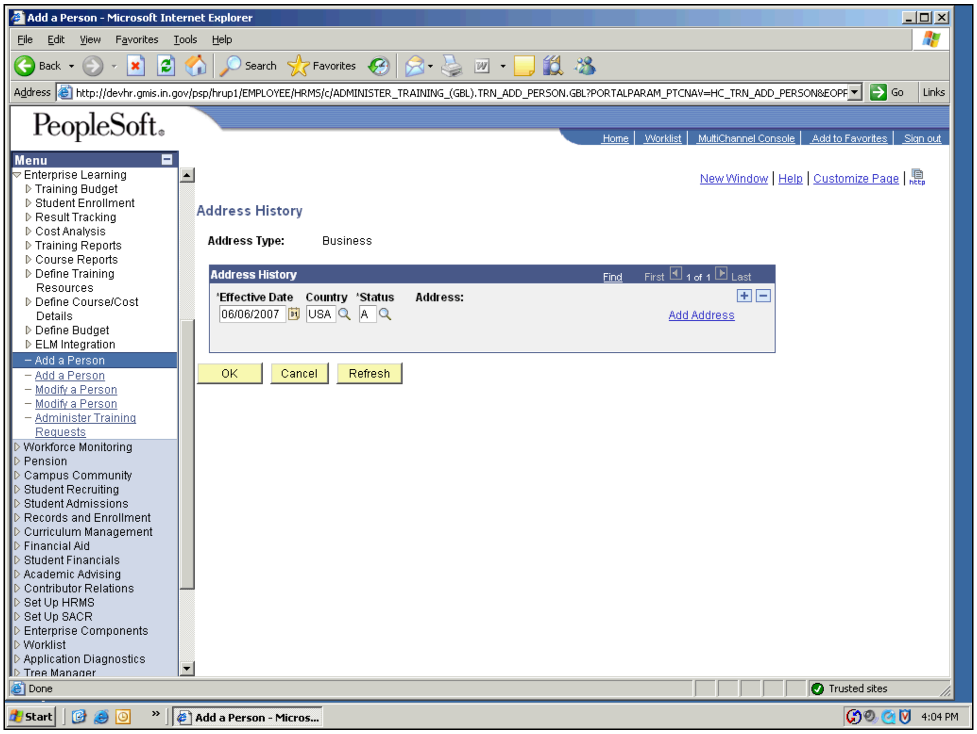
Step	Action
10.	The **Date of Birth** field should be left blank for an external trainee or instructor. The **Gender** field is a required field and **Male** or **Female** must be one of the selected values. The **Highest Ed Level** and **Marital Status** fields should be marked **Unknown** or **Not Indicated.** Click the ***Marital Status** field drop-down menu button.
11.	Select **Unknown** from the list of values. Unknown
12.	Click the ***National ID Type** field drop-down menu button.
13.	Select **Driver's License Number** from the list of values. Driver's License Number
14.	Enter the driver's license number into the **National ID** field.



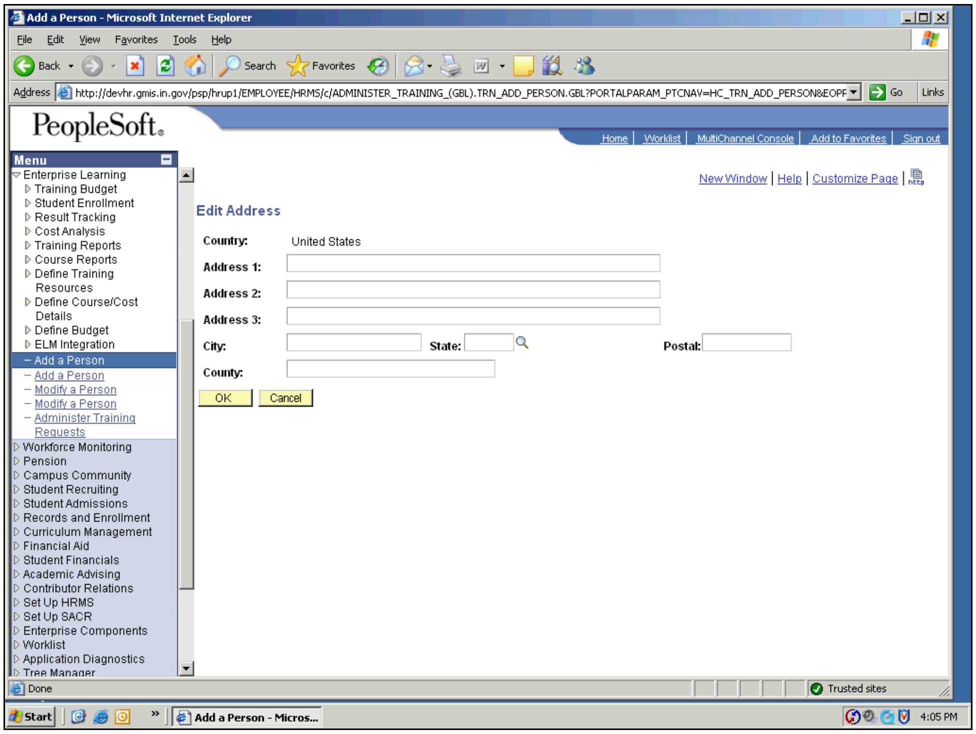
Step	Action
15.	Click the **Contact Information** tab. Contact Information



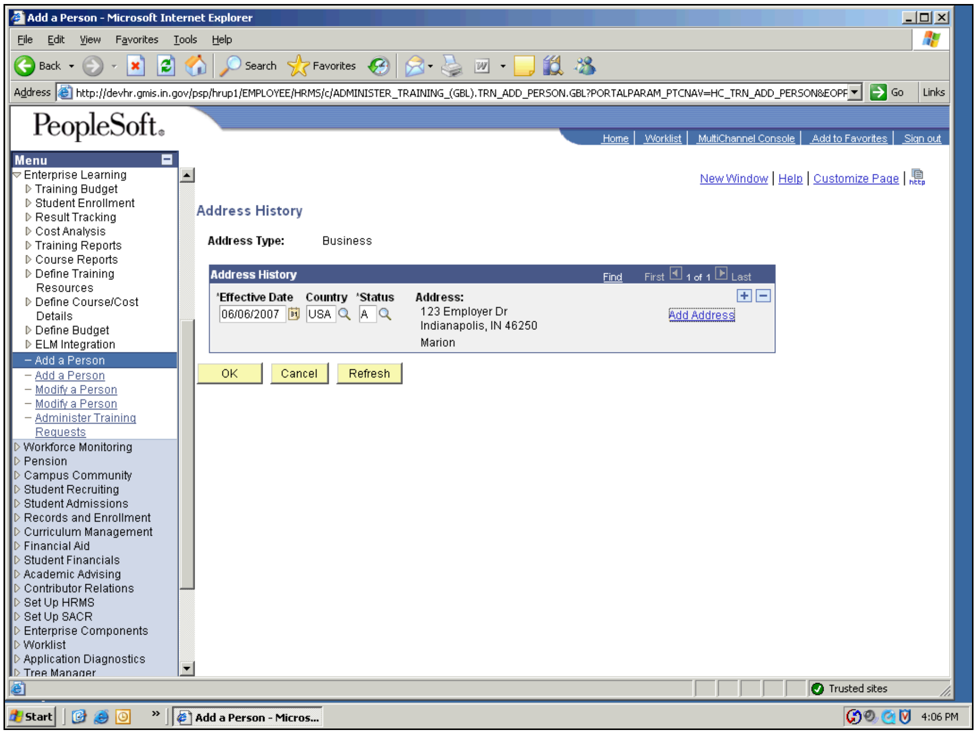
Step	Action
16.	Click the **Add a new row (Alt+7)** button. 
17.	Click the **Address Type** field drop-down menu button. 
18.	Select **business** from the list of values. Business
19.	Click the **Add Address Detail** link. Add Address Detail



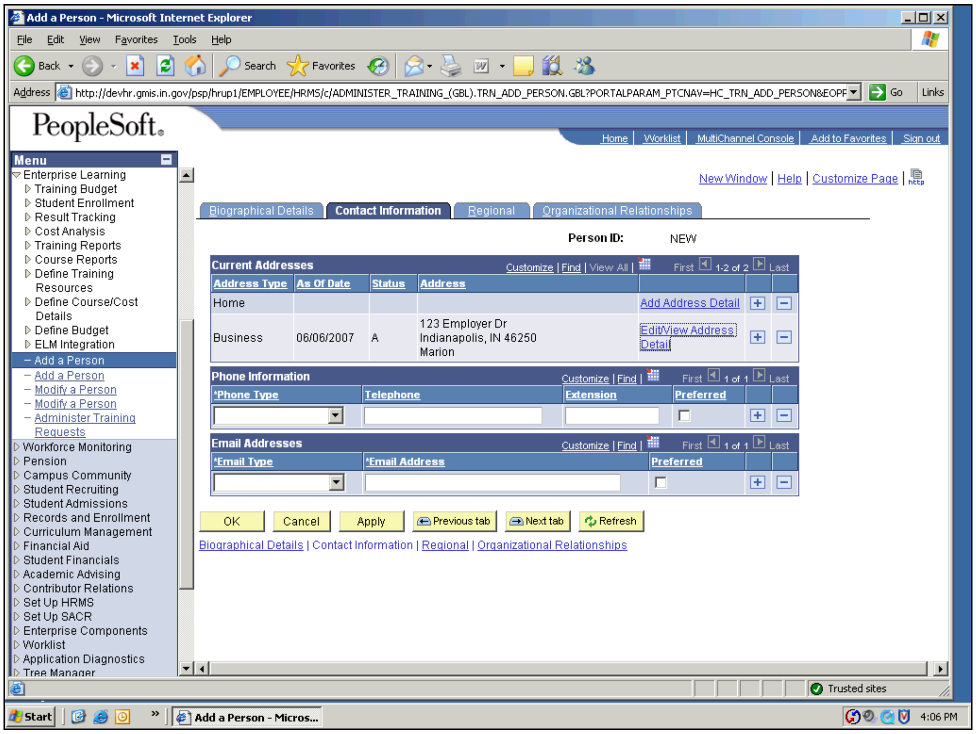
Step	Action
20.	Click the **Add Address** link. Add Address



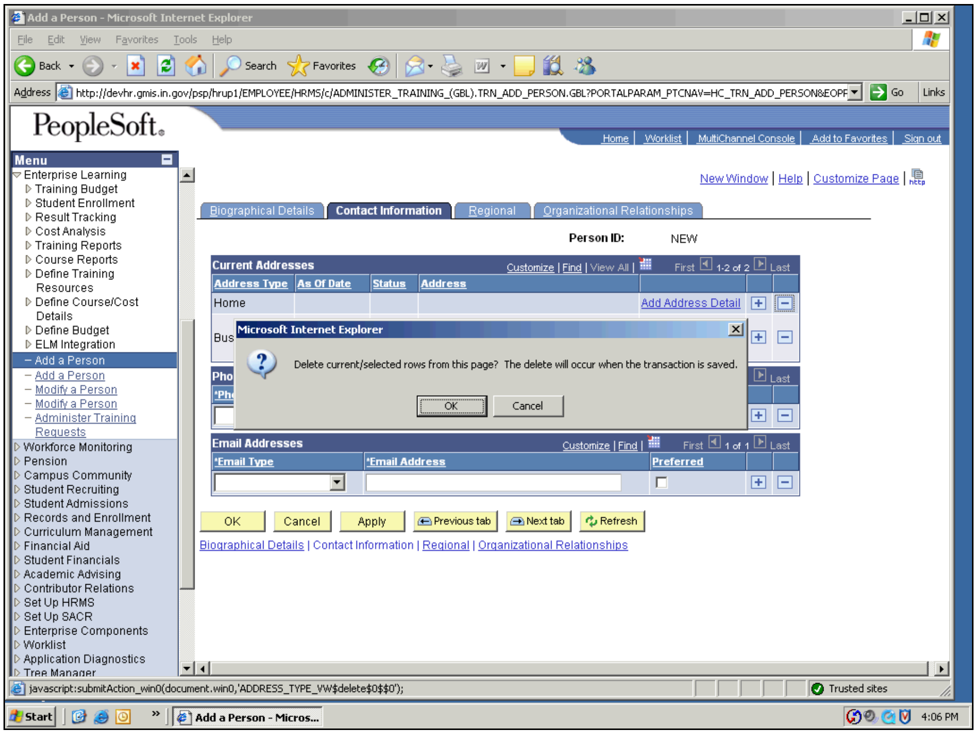
Step	Action
21.	Enter the business address into the **Address 1** field.
22.	Enter the city into the **City** field.
23.	Enter the state into the **State** field.
24.	Enter the zip code into the **Postal** field.
25.	Enter the county into the **County** field.
26.	Click the **OK** button. OK



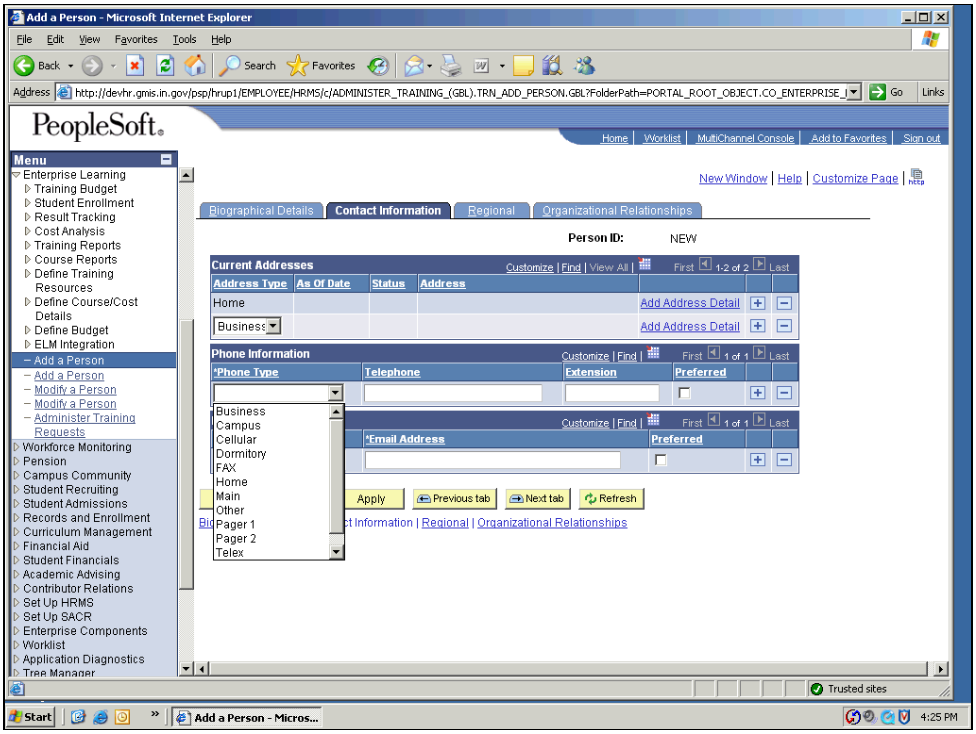
Step	Action
27.	Click the **OK** button. OK



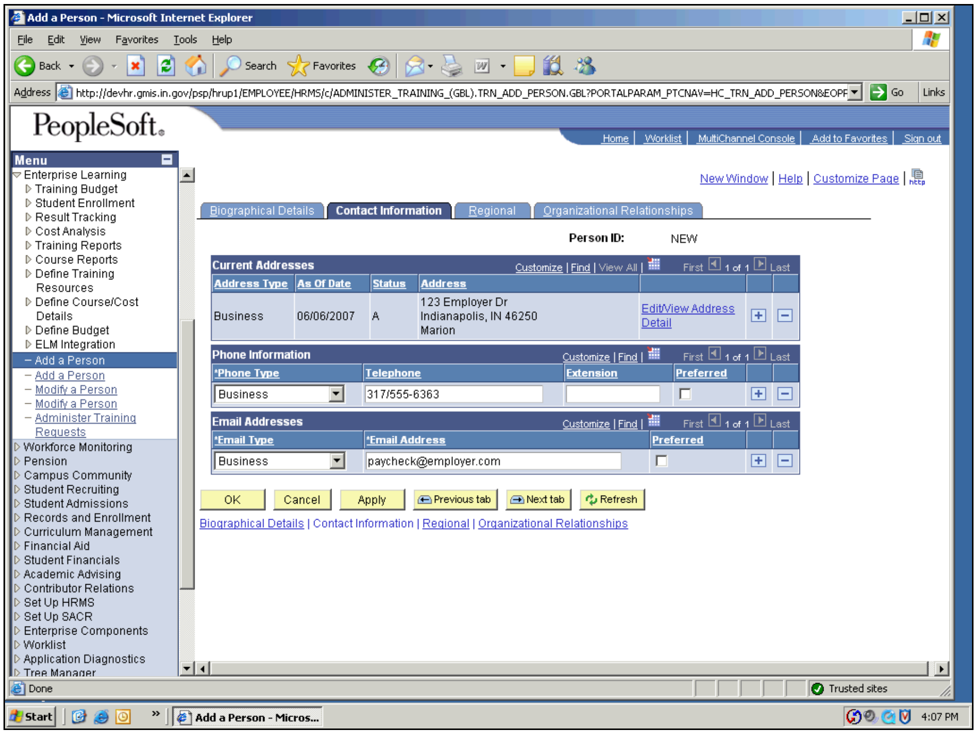
Step	Action
28.	Click the **Delete row** button to delete the home address row.



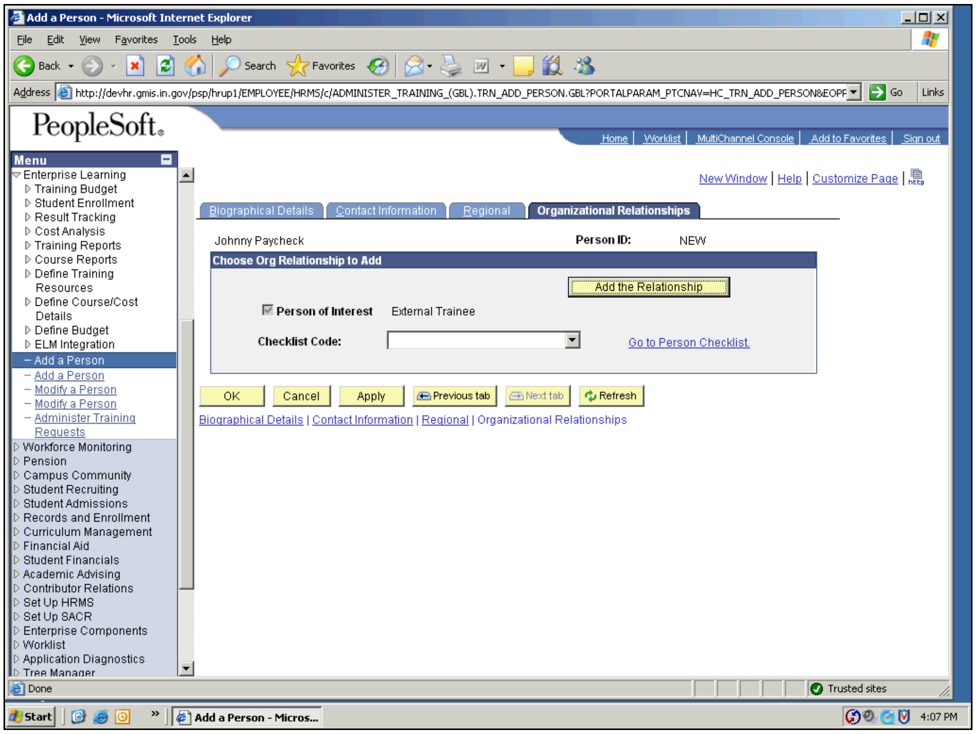
Step	Action
29.	Click the **OK** button. OK



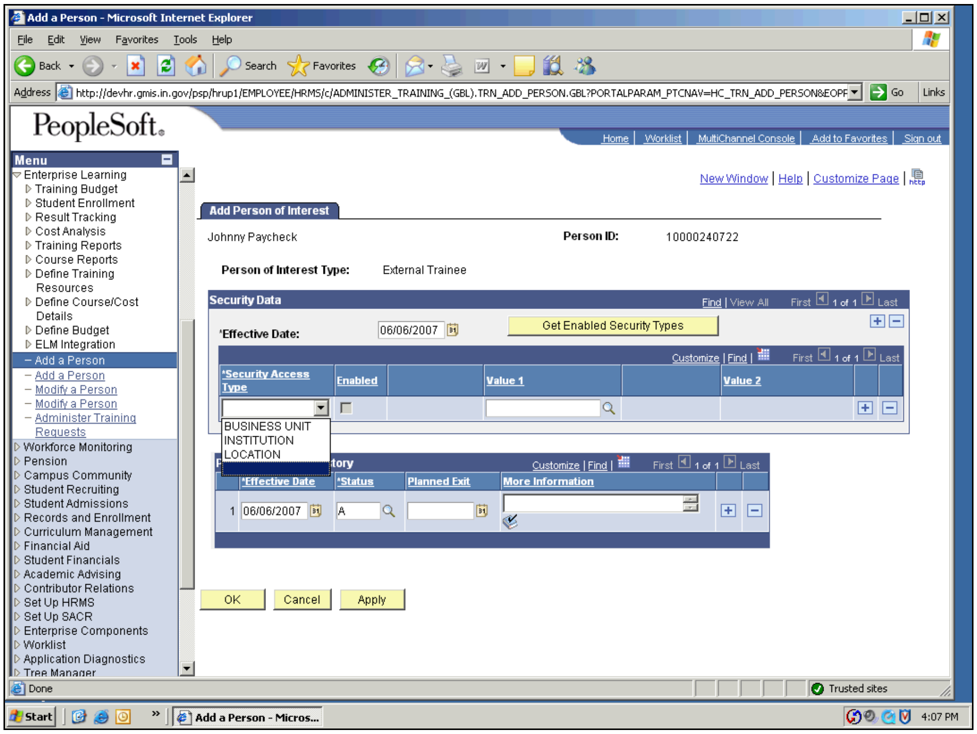
Step	Action
30.	Select **Business** from the list of values. Business
31.	Enter the business phone into the **Telephone** field.
32.	Select **Business** from the list of values. Business
33.	Enter the business email into the ***Email Address** field.



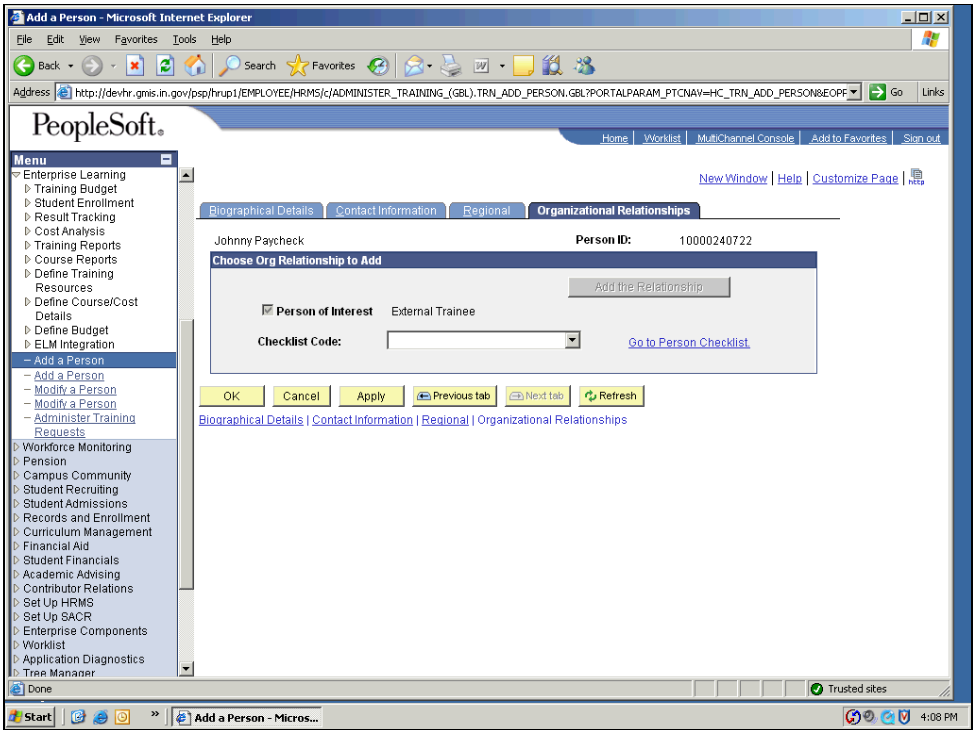
Step	Action
34.	Click the **Organizational Relationship** tab. Organizational Relationships



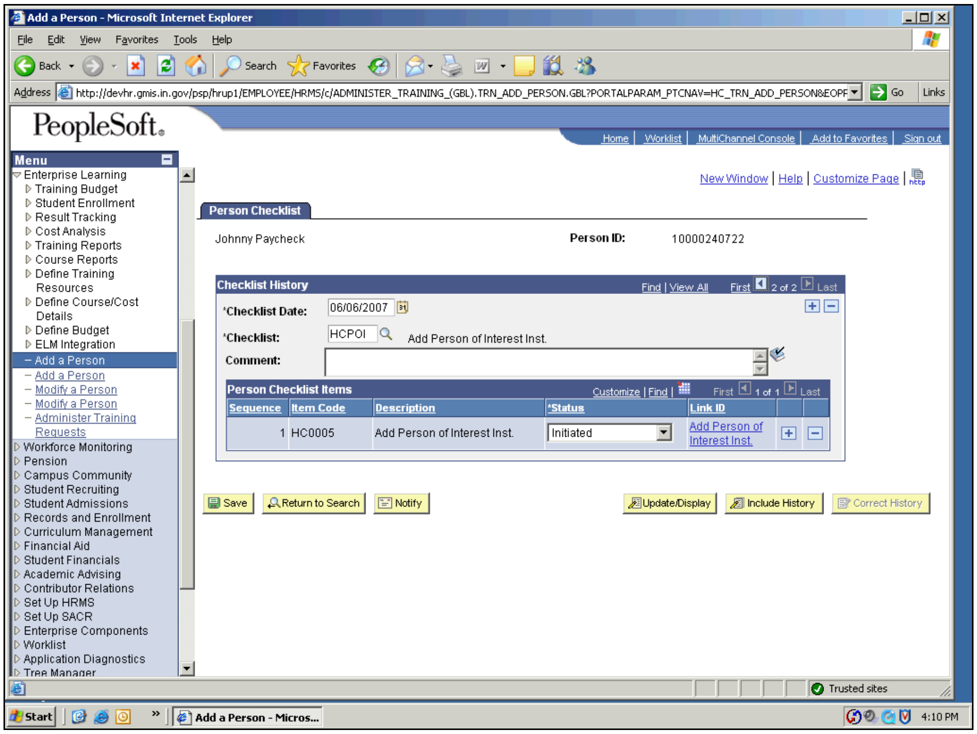
Step	Action
35.	Click the **Add the Relationship** button. Add the Relationship



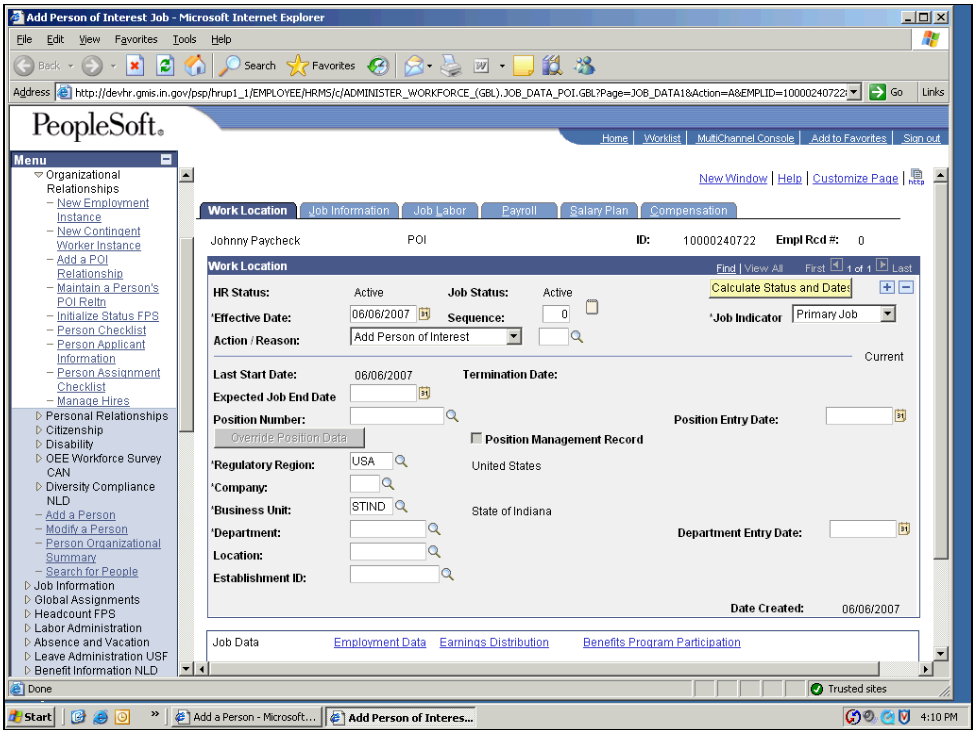
Step	Action
36.	Verify that the **Effective Date** field has the correct effective date or date of hire. Select **Business Unit** from the list of values. BUSINESS UNIT
37.	Enter your business unit into the **Value 1** field.
38.	Click the **OK** button.



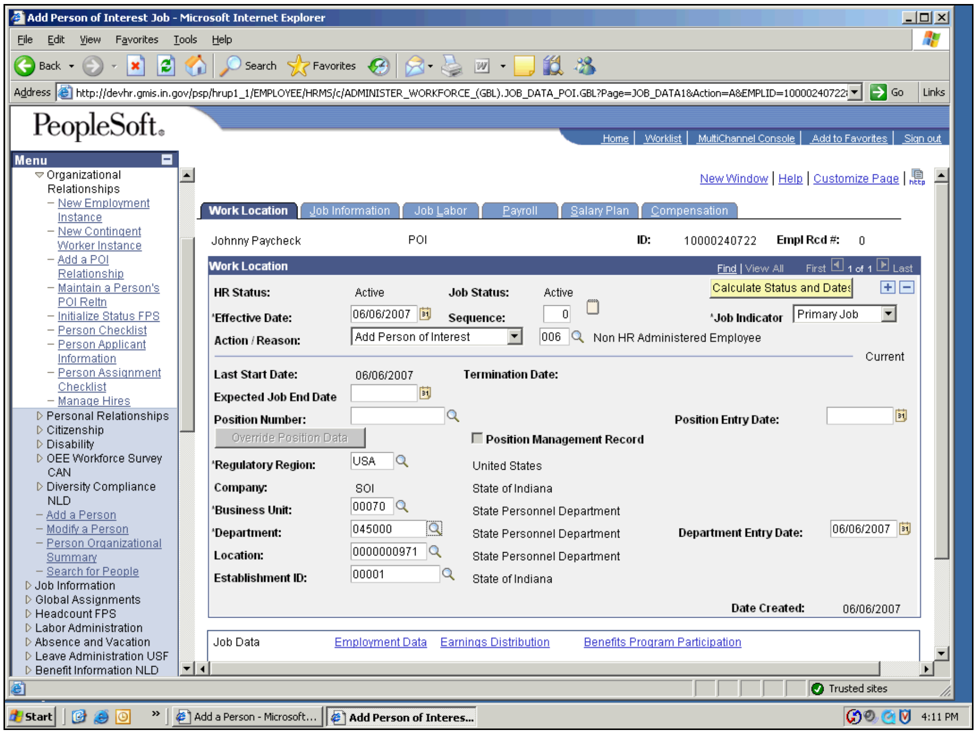
Step	Action
39.	Click the **Checklist Code** drop-down menu button. 
40.	Select **Add Person of Interest Inst.** from the list of values. Add Person of Interest Inst.
41.	Click the **Apply** button. Apply
42.	Click the **Go to Person Checklist** link. Go to Person Checklist.



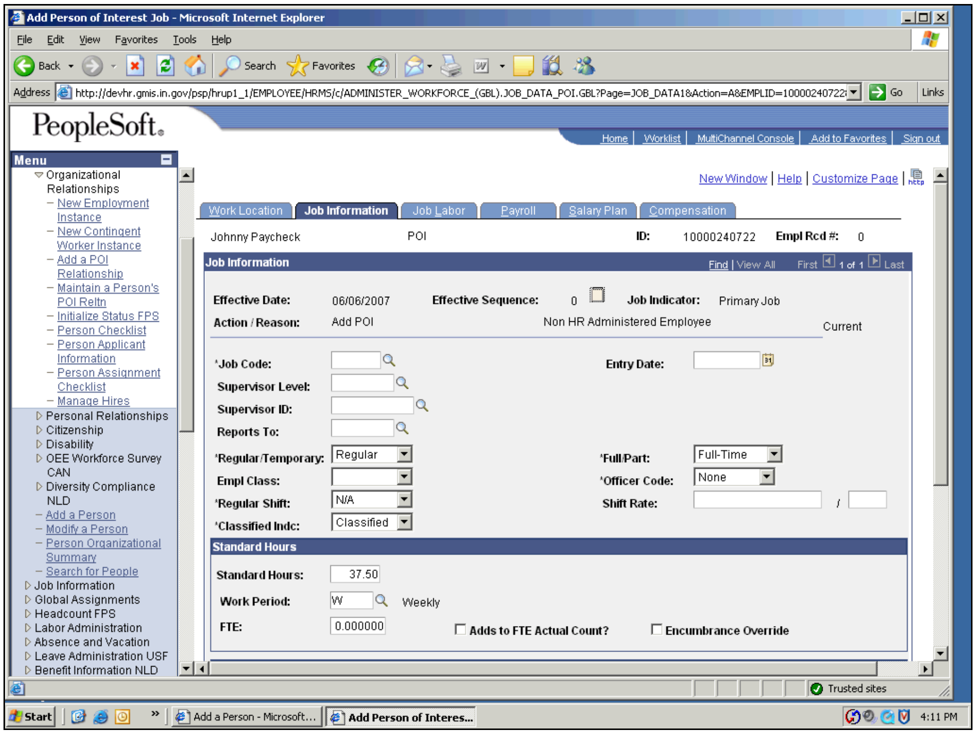
Step	Action
43.	Click the **Add Person of Interest Inst** link. **Note:** A pop up window will display to finish the transaction. Add Person of Interest Inst.



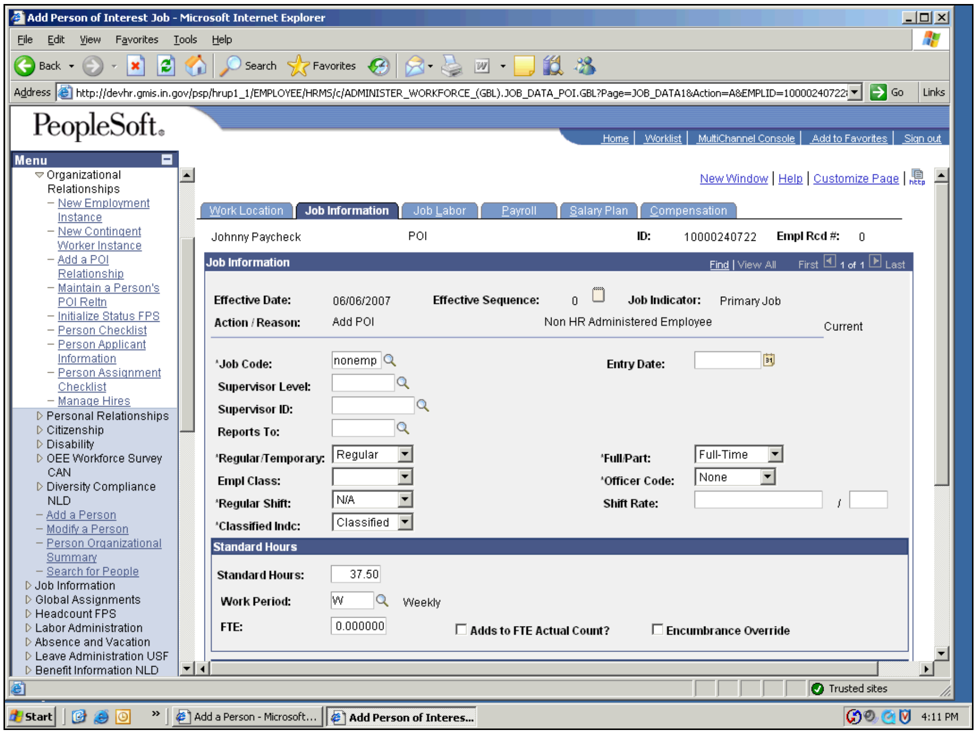
Step	Action
44.	Enter the reason into the **Reason code** field.
45.	Enter your business unit into the ***Business Unit** field.
46.	Enter the department associated with the external trainee into the ***Department** field.
47.	Press the **[Tab]** key.



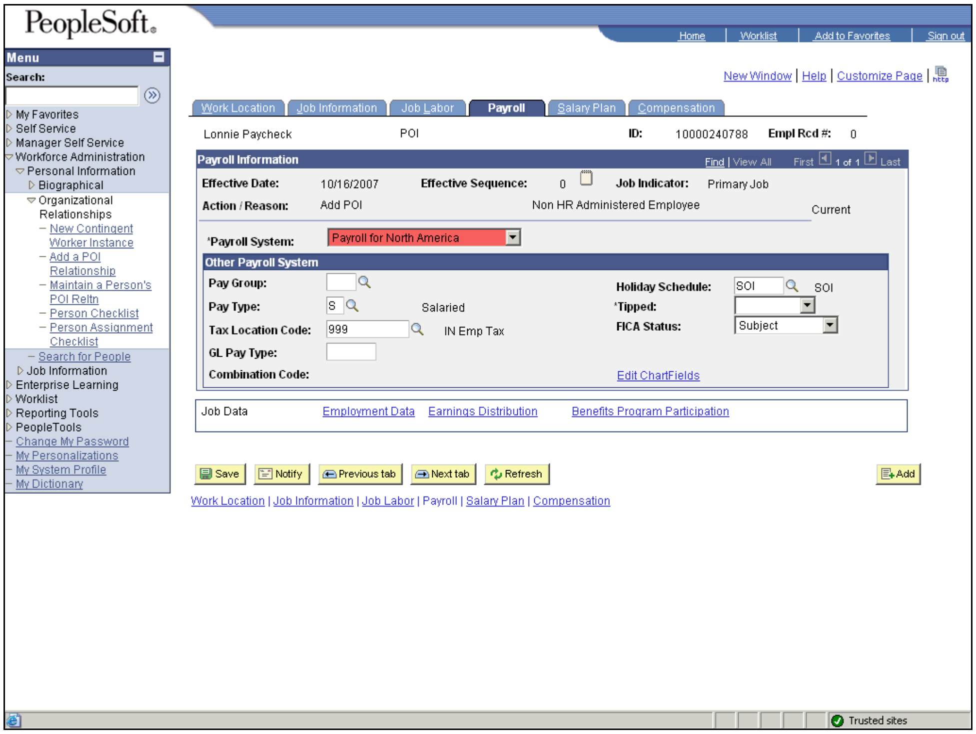
Step	Action
48.	Click the **Job Information** tab. 



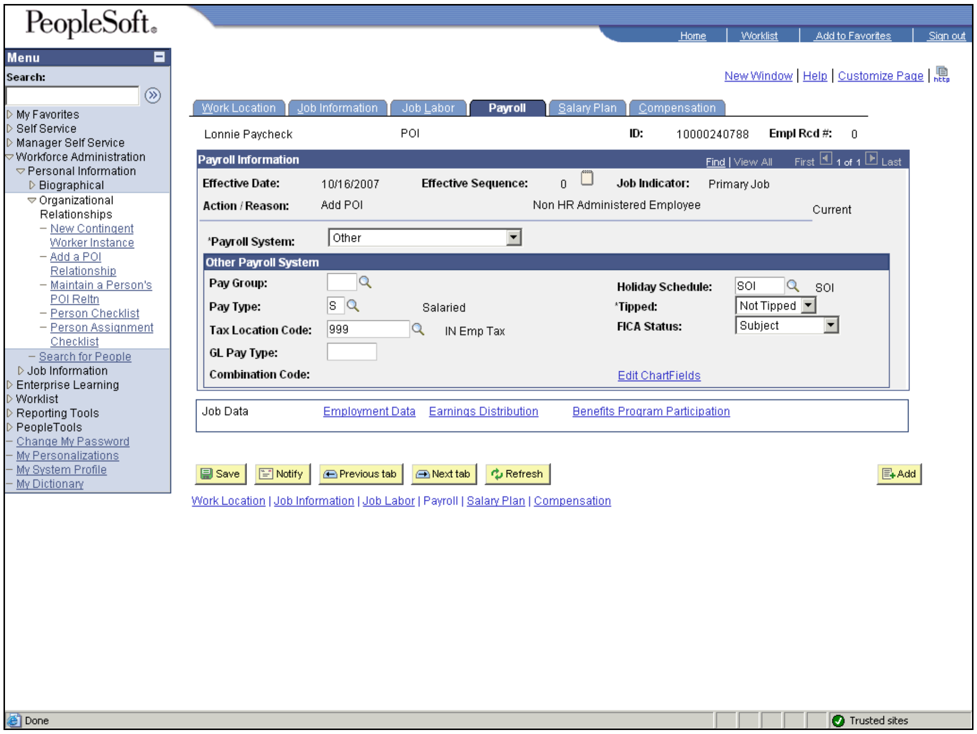
Step	Action
49.	Enter the NONEMP into the ***Job Code** field.

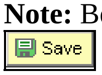


Step	Action
50.	Click the **Payroll** tab. 



Step	Action
51.	Click the **Payroll System** drop-down menu button. 
52.	Select **Other** from the list of values. Other



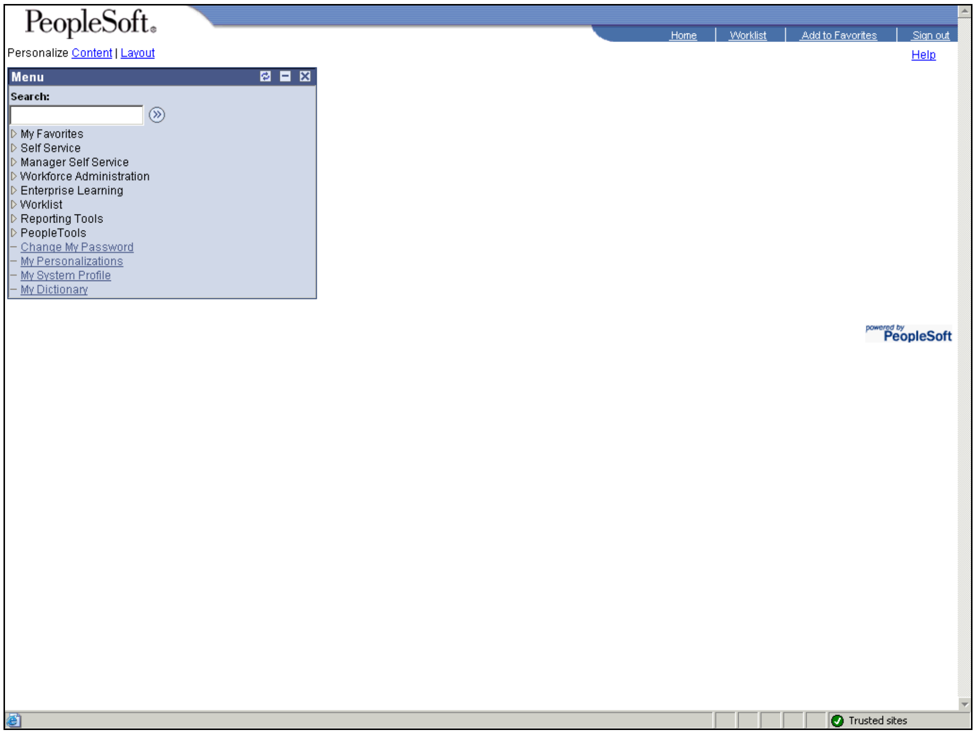
Step	Action
53.	Click the **Save** button. **Note:** Be sure to record the employee id number before closing the record. 
54.	**End of Procedure.**

Modify an External Trainee

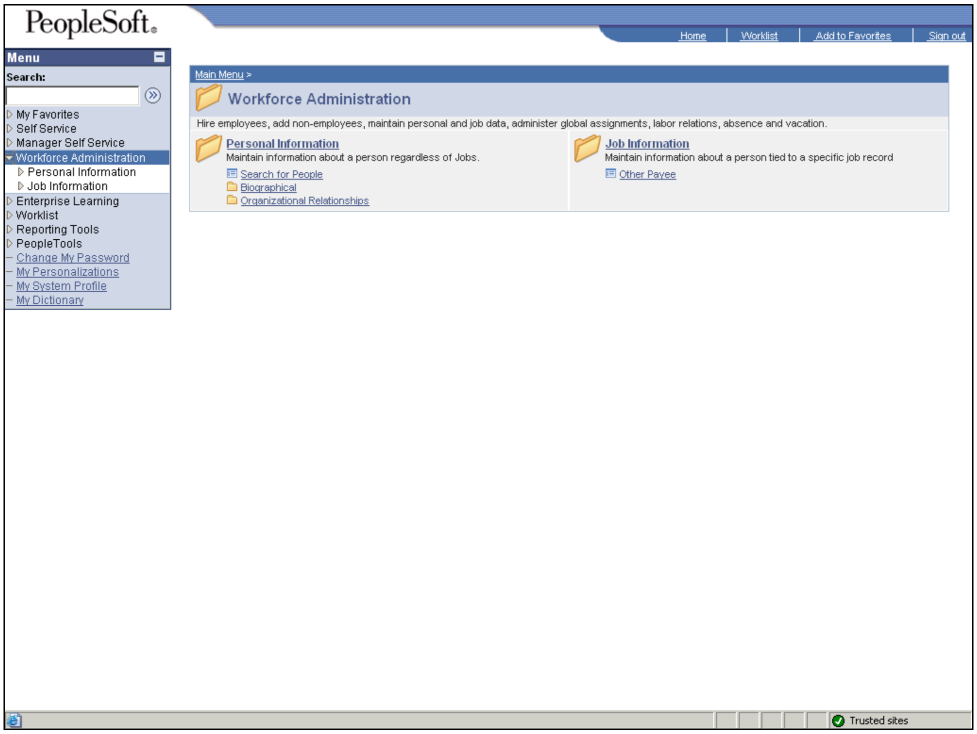
Procedure

The Modify an External Trainee module is used when a contingent worker was previously a State of Indiana employee and already has a PeopleSoft Employee ID number in the PeopleSoft system.

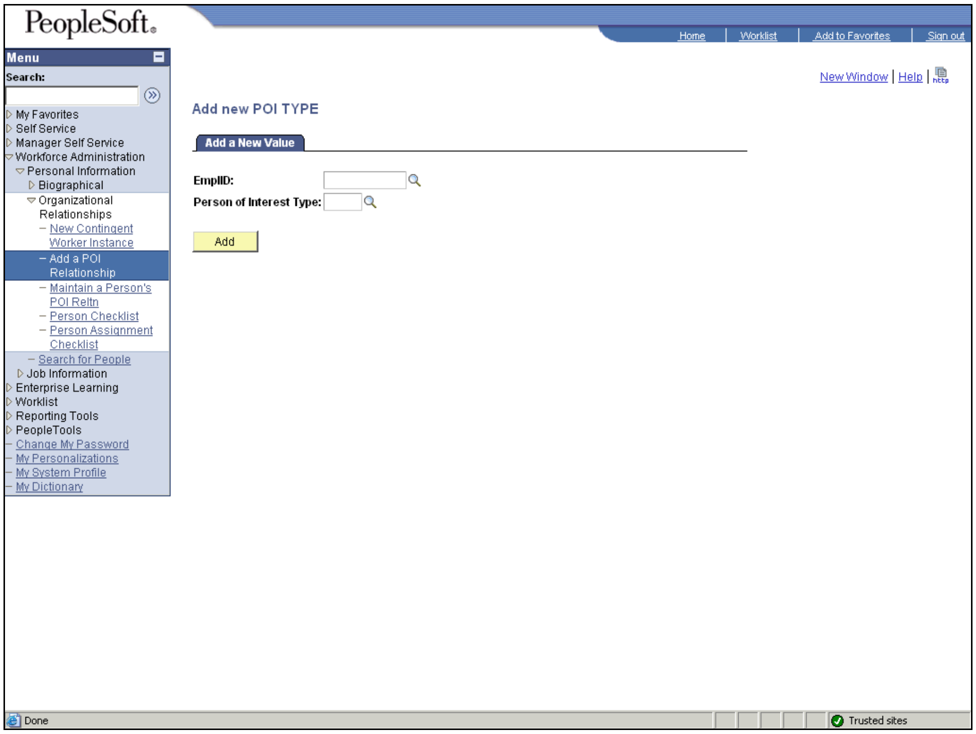
External trainees are contingent employees whose services are retained by the State of Indiana through another company. The vendor and/or contact company employees and pays the external employee.



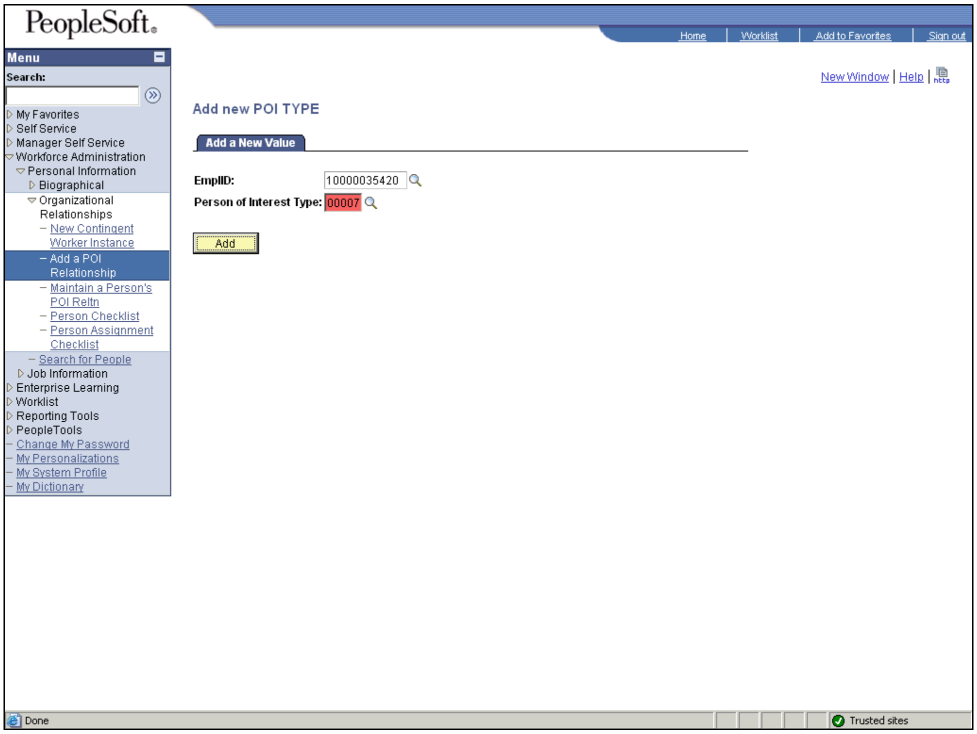
Step	Action
1.	Click the **Workforce Administration** link. 



Step	Action
2.	Under the **Personal Information** section, click the **Organizational Relationships** link. Organizational Relationships
3.	Click the **Add a POI Relationship** link. Add a POI Relationship



Step	Action
4.	Enter the employee into the **EmplID** field.
5.	Enter 00007 into the **Person of Interest Type** field.



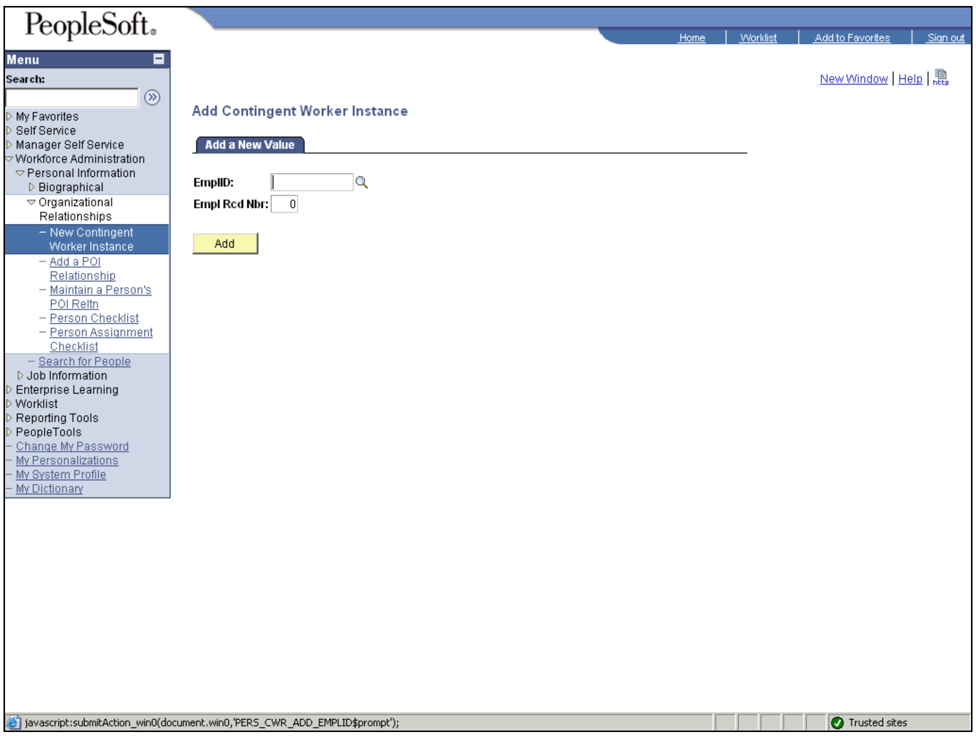
Step	Action
6.	Click the **Add** button. Add

When adding a non-employee be sure to update the effective date as needed. The effective date **must** reflect the date the non-employee began their contractual relationship with the agency. Failure to record the correct effective date will impact the ability to enroll this person in course sessions. A person (employee, non-employee) must be in an active status on the first date of the session to be enrolled.

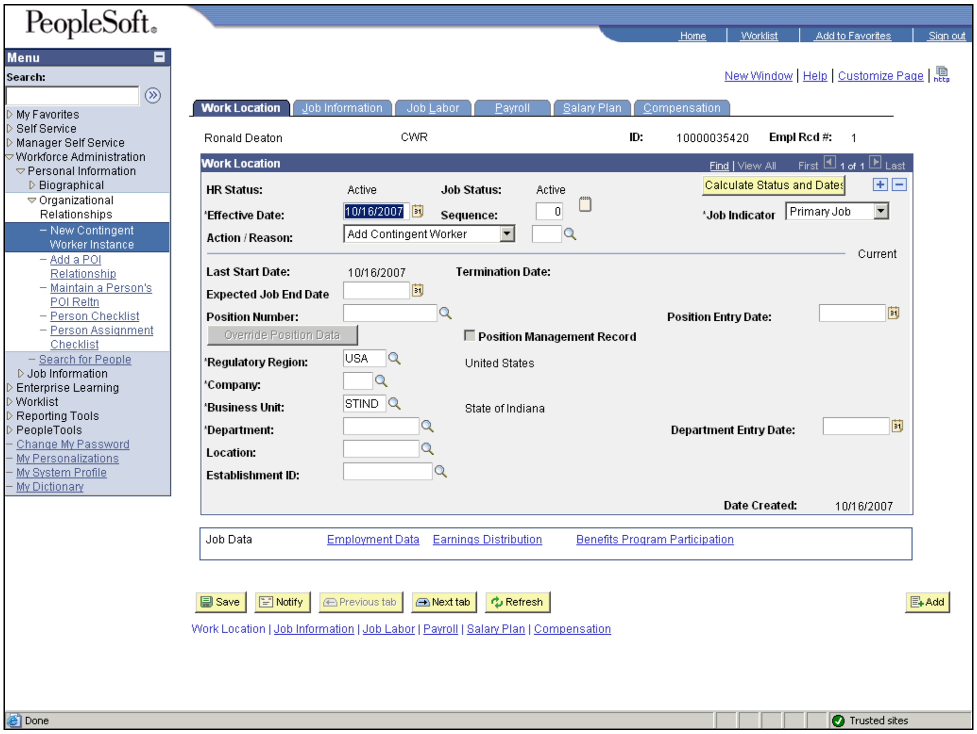
Step	Action
7.	Click the **BUSINESS UNIT** list item. BUSINESS UNIT
8.	Enter the business unit into the **Value 1** field.

When adding a non-employee be sure to update the effective date as needed. The effective date **must** reflect the date the non-employee began their contractual relationship with the agency. Failure to record the correct effective date will impact the ability to enroll this person in course sessions. A person (employee, non-employee) must be in an active status on the first date of the session to be enrolled.

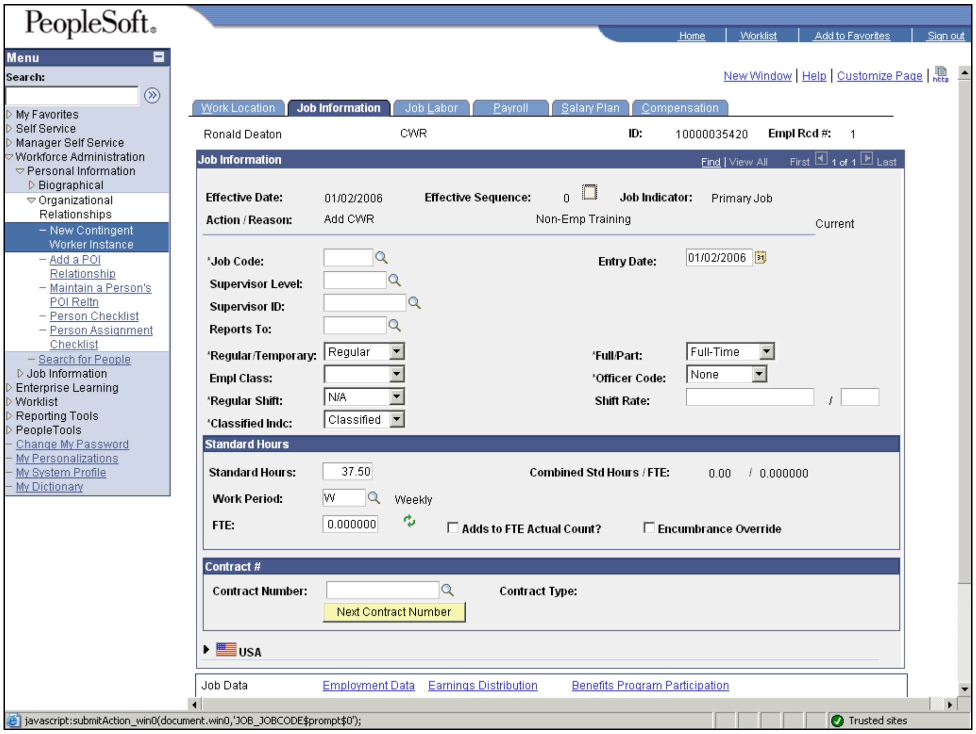
Step	Action
9.	Click the **Save** button. Save
10.	Click the **New Contingent Worker Instance** link in the menu on the left side of the screen. New Contingent Worker Instance



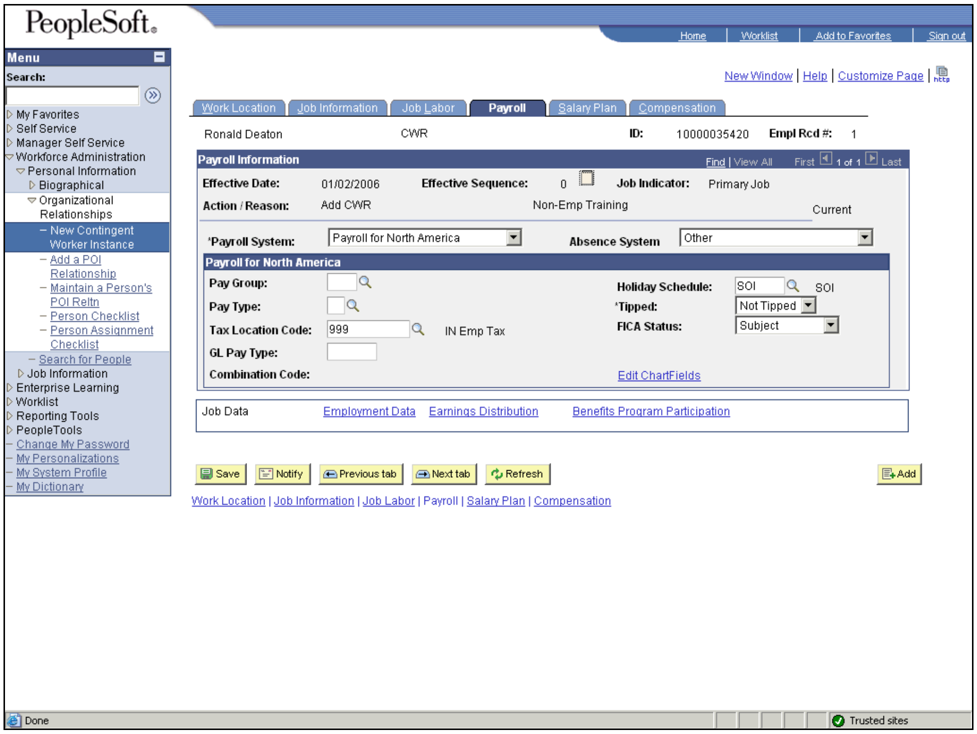
Step	Action
11.	Enter the employee id into the **EmplID** field.
12.	Click the **Add** button. Add



Step	Action
13.	Enter the effective date into the **Effective Date** field.
14.	Enter the TRN into the **Look up (Alt+5)** field.
15.	Enter the business unit into the **Business Unit** field.
16.	Enter the department into the **Department** field.
17.	Click the **Job Information** tab. 



Step	Action
18.	Enter NONEMP into the **Job Code** field.
19.	Click the **Payroll** tab. 

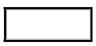
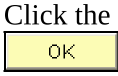


Step	Action
20.	Click the **Payroll System** drop-down menu button.
21.	Select **Other** from the list of values. Other
22.	Click the **Save** button. Save
23.	**End of Procedure.**

Appendices

Appendix A - Adding a Course Session

1.	Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Define Course/Cost Details** link. Define Course/Cost Details
3.	Click the **Course Sessions** link. Course Sessions
4.	Click the **Collapse Menu** button to display the full screen.
5.	Click the **Add a New Value** tab. Add a New Value
6.	Click in the **Course Code** field.
7.	Enter the course code number into the **Course Code** field. **Note:** If you do not know the course code, click on the **Magnifying Glass** button to look up the course codes.
8.	Click the **Add** button. **IMPORTANT: Leave the Course Session Number Blank.** **The system will assign a sequential number when you save the record.** Add
9.	Use the **Course Session Profile** tab to **enter**, **update**, or **view** a session status, date, time, capacity, duration, and vendor ID number. Specify the session status, such as **Active**, **Canceled**, or **Complete** in the **Session Status** field. In this instance, a new training session is being created so the default status of **Active** for the **Session Status** field will not change. Click in the **Start Date** field.
10.	Enter the course start date into the **Start Date** field.
11.	Press the **[Tab]** key.
12.	Enter the course end date into the **End Date** field.
13.	Click in the **Start Time** field.
14.	Enter the course start time into the **Start Time** field.

15.	Press the **[Tab]** key.
16.	Enter the course end time into the **End Time** field. **Note:** PeopleSoft will automatically format and default the time to an AM format. If the training ends in the PM, this will need to be entered correctly or changed after the default.
17.	The **Duration** field indicates the length of the training as entered into the **Start/End Times** fields. 
18.	The **Duration Unit** field indicates the unit indication in the **Duration** field. **ALWAYS** use the duration unit of **Hour**. 
19.	Click in the **Vendor ID** field. 
20.	Enter the **Business Unit** number of the business unit or vendor conducting the training into the **Vendor ID** field. If the business unit number is unknown, click on the **Magnifying Glass** button to look up the course codes.
21.	Click the **Location, Instructor** tab. 
22.	Click in the **Facility** field. 
23.	Enter the facility location into the **Facility** field. **Note:** If the facility location code is unknown, click on the **Magnifying Glass** button to look up the course codes.
24.	Press the **[Tab]** key.
25.	If a facility has more than one training room available, the **Select free Training Room** link will become active. Click the **Select free Training Room** link. 
26.	To select a **Free Training Room**, click in the checkbox beside the **Room Code** option to be selected. 
27.	Click the **OK** button. 

28.	The Training Facility Address can be viewed by clicking the **Training Facility Address** link. Click the **Training Facility Address** link. Training Facility Address
29.	Review the **Training Facility Address** information. Click the **OK** button when finished. OK
30.	To add instructors who are certified to teach the training, click the **Select free Instructor** link. Select free Instructor
31.	If more than 3 choices are present, clicking the **View All** link will allow all instructors to be viewed at one time. Click the **View All** link. View All
32.	Click the checkbox of the selected instructor from the **Instructor** column.
33.	Scroll down the page to locate the OK button.
34.	Click the **OK** button. OK
35.	Click the **Equipment** tab. Equipment
36.	To search for equipment or materials needed for the training session, click the **Look up Equipment/Materials Code (Alt+5) Magnifying Glass** button.
37.	If the **Equipment/Materials Code** information is not known, supplies or equipment may be searched for by **Description**. Click the **Description** field drop-down menu button.
38.	Select **contains** from the list of values. contains
39.	Enter the description of the equipment or materials needed into the **Description** field.
40.	Click the **Look Up** button. Look Up
41.	Select an option from either the **Equipment/Materials Code** or **Description** column. E023 projector
42.	Click the **Expense** tab to fill in the information for any classes that charge a fee. Expense

43.	Click the **Save** button. **Note:** Clicking the **Save** button will generate the **Session #** for the class. 
44.	Congratulations! You have successfully added a course session. **End of Procedure.**

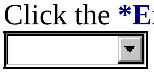
Appendix B – Adding an Instructor

1.	Click the **Enterprise Learning** link. 
2.	Click the **Define Training Resources** link. 
3.	Click the **Instructors** link. 
4.	Click the **Add a New Value** tab. **Note:** Search for an existing instructor by entering their name or searching with the **Instructor ID Magnifying Glass (Alt+5)**. 
5.	Click the **Add a New Value** tab. 
6.	Enter the instructor's PeopleSoft ID number into the **Instructor ID** field.
7.	Click the **Add** button. 
8.	The **Instructor Details** information box shows the **Effective Date** the instructor was entered into the system, the instructor's **Status**, and whether the instructor is an internal State of Indiana employee or an external vendor. Additional information may be added as desired. Press the **[Enter]** key to continue.
9.	Use the **Qualification** tab to **add**, **update**, or **display** the courses that the instructor is qualified to teach. Click the **Qualification** tab. 
10.	Click in the **Course Code** field. 

11.	In the Course Code field, specify a course code from the list of courses that the instructor will teach. Enter the course code into the **Course Code** field.
12.	Press the **[Tab]** key to populate the Course title.
13.	To list additional courses the instructor is qualified to teach, click the **Add a new row** button.
14.	Click the **Save** button.
15.	You have successfully added Luis Duarte as an instructor. **End of Procedure.**

Appendix C – Enrolling Students Individually

1.	Begin by navigating to the **Course Session Enrollment** page. Click the **Enterprise Learning** link.
2.	Click the **Student Enrollment** link.
3.	Click the **Enroll Individually** link.
4.	Enter the desired information into the **Course Code** field.
5.	Click in the **Course Session Nbr** field.
6.	Enter the desired information into the **Course Session Nbr** field.
7.	Click the **Search** button.
8.	Use the **Course Session Enrollment** page to enroll students. **CAUTION:** As you select each student for enrollment, always double-check the Business Unit field and verify that it is the correct employee. Name searches sometimes display more than one individual with the same name.
9.	Enter the desired information into the **EmplID** field.
10.	Specify the student enrollment status, such as Enrolled or Sessn Wait in the **Enrollment/Attendance** field. Click the ***Enrollment/Attendance** list.
11.	Select **Enrolled**.

12.	The **Status Date** field uses the current system date by default. Accept the default date for this field.
13.	Specify the reason for training in the **Training Reason** field. Click the **Training Reason** list. 
14.	Click an entry in the list. Always select **Skill Enhancement.** 
15.	Leave the **Prerequisites Met** option turned off. After you have finished all enrollments, you may use **Prerequisite Checking** (above) to verify that your students' course requirements have been met. Prerequisites, if used, would need to be set up when the Course is entered into the system.
16.	You may use the **Prerequisite Checking** button to search the Student Training records listed on the **Session Enrollment** page and determine if each student has completed and passed the prerequisite courses. If so, PeopleSoft populates the **Prerequisites Met** check box for each student who meets the criteria. If a student is lacking the necessary courses, a process for notifying students of discrepancies may be developed. Also, any enrolled status existing for students who do not meet the prerequisites may be manually changed.
17.	Use the **Letter Code** field to generate a form letter. The letter code defaults to CON, indicating Confirmed. For this exercise, accept the default letter code value. **IMPORTANT!!** The system does not currently support the generation of letters. At this time, you must have an alternative method of notifying students.
18.	We will now add another student. Click the **Add Row** button. 
19.	Enter the desired information into the **EmplID** field.
20.	Click the ***Enrollment/Attendance** list. 
21.	Click an entry in the list. Select **Enrolled.** 
22.	Click the **Training Reason** list. 
23.	Click an entry in the list. Select **Skill Enhancement.** 

24.	You have enrolled two employees in Presentation Skills course session 0001. If you enroll more than the maximum number of employees allowed in the session, the PeopleSoft application issues a warning message when you save the page.
25.	Your enrollment(s) are completed. Click the **Save** button. Save
26.	You have successfully enrolled individual students into a course session. **End of Procedure.**

Appendix D – Enrolling Students in Multiple Courses

1.	Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Student Enrollment** link. Student Enrollment
3.	Click the **Enroll in Course** link. Enroll in Course
4.	Click the **Enroll in Course** link. Enroll in Course
5.	Enter the employee ID number into the **EmplID** field. If the employee's employee ID number is not known, search by the employee's name.
6.	Click the **Search** button. Search
7.	Click the **Add a new row** button.
8.	Enter the course code of the course in which to enroll the employee into the **Course Code** field.
9.	Press the **[Tab]** key to populate the course title.
10.	Click in the **Session #** field.
11.	Enter the course session number in which to enroll the employee into the **Session #** field.
12.	Press the **[Tab]** key to populate the course session's information.
13.	Click the **Attendance** drop-down menu button.
14.	Select **Enrolled** from the list of values. Enrolled

15.	Click the **Training Reason** drop-down menu button.
16.	Select **Skill** from the list of values. Skill
17.	Click the **Add a new row** button to add another course in which to enroll the employee.
18.	Enter the course code of the course in which to enroll the employee into the **Course Code** field.
19.	Press the **[Tab]** key to populate the course title.
20.	Click in the **Session #** field.
21.	Enter the course session number in which to enroll the employee into the **Session #** field.
22.	Press the **[Tab]** key to populate the course session's information.
23.	Click the **Attendance** drop-down menu button.
24.	Select **Enrolled** from the list of values. Enrolled
25.	Click the **Training Reason** drop-down menu button.
26.	Select **Skill** from the list of values. Continue adding rows and course information until the employee has been enrolled in all needed courses. Skill
27.	Scroll down the page to locate the **Save** button.
28.	Click the **Save** button. Save
29.	**End of Procedure.**

Appendix E – Creating a Sign-In Sheet

1.	Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Training Reports** link. Training Reports
3.	Click the **Course Sign In** link. Course Sign In
4.	Click the **Add a New Value** tab. Add a New Value
5.	Enter the run control ID into the **Run Control ID** field. **Note:** The run control ID is not an assigned value. It is created by the user. The run control ID identifies the employee producing the course sign in sheet.
6.	Click the **Add** button. Add
7.	Click in the **Course** field.
8.	Enter the course number into the **Course** field.
9.	Press the **[Tab]** key.
10.	To add the session number, click the **Session # Magnifying Glass(Alt+5)** button.
11.	Click a course session number in the **Course Session Nbr** column. 0057
12.	Click the **Run** button. Run
13.	Click the **OK** button. OK
14.	Click the **Refresh** button. **Note:** The **Refresh** button will need to be clicked until the **Run Status** column indicates **Success** and **Distribution Status** column indicates **Posted**. The **Refresh** button may need to be clicked several times. Refresh
15.	Click the **Details** link for the most recent report. **Note:** The most recent report is always located at the top of the list. Details
16.	Click the **View Log/Trace** link. View Log/Trace

17.	Locate the report in the **Name** column. Click the **SOI0040C_456565.PDF** link. **Note:** The report is indicated by the .PDF file extension. SOI0040C_456564.PDF
18.	Click the **Maximize/Restore** button to enlarge the **course sign in** sheet.
19.	Click the MicroSoft **File** menu option to select **print** from the list of values. This will allow the **course sign in** sheet to be printed. File
20.	**End of Procedure.**

Appendix F – Creating a Course Roster

1.	Begin by navigating to the **Course Session Roster** page. Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Course Reports** link.
3.	Click the **Course Session Roster** link.
4.	You will need to **Find an Existing** or **Add a New Value** for **Run Control ID.** We are going to **Add a New Value.**
5.	Enter the desired information into the **Run Control ID** field.
6.	Click the **Add** button. Add
7.	Use the **Course Session Roster** page to define report parameters such as the course name, session number, and session start date.
8.	Enter your **Course** number.
9.	Click in the **Session #** field.
10.	In the **Session #** field, specify the course session number for which you want to run the report. Alternatively, specify the beginning date of the course in the **Course Start Date** field.
11.	Click the **Run** button. Run
12.	Use the **Process Scheduler Request** page to specify the parameters that are used when running the report.

13.	Select **Web** from the **Type** list. Web
14.	Select format **PDF.** PDF
15.	By clicking **OK,** you will submit the process to create the **Course Session Roster** for this session. Click the **OK** button. OK
16.	Notice a process instance number is displayed. This number is used to identify the process. Use the **Process Monitor** link to retrieve the run status for the **Course Session Roster.** Click the **Process Monitor** link. Process Monitor
17.	Use the **Process List** page to check the status of the process and verify that it is successfully completed
18.	Notice that the **Run Status** for the requested job should be **Success** and the **Distribution Status** should be **Posted.** You may need to click the **Refresh** button multiple times to achieve this result.
19.	You have successfully created a course session roster. **End of Procedure.**

Appendix G – Closing a Course Session

1.	Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Student Enrollment** link. Student Enrollment
3.	Click the **Enroll Individually** link. Enroll Individually
4.	Enter the course code number into the **Course Code** field.
5.	Click in the **Course Session Nbr** field.
6.	Enter the course session number into the **Course Session Nbr** field.
7.	Click the **Search** button. Search

8.	To see all of the employees enrolled in a course, click the **View All** link. View All
9.	Scroll down the page to change the status of the students as required.
10.	Click the **Attendance** drop-down menu button.
11.	Valid values from the list are: **<u>Enrolled</u>:** employees left as enrolled in a course statuses will automatically changed to Completed when the course session is marked as Complete. **<u>Dropped</u>:** the employee notified the training department that they would be unable to attend the training prior to the training start time. **<u>No Show</u>:** the employee did not come to the training and did not contact the training department prior to the training start time. Select **No Show** from the list of values. No Show
12.	Scroll down the page to change the status of the students as required.
13.	Click the **Attendance** drop-down menu button.
14.	Select **Dropped** from the list of values. Dropped
15.	Once all **Attendance** field statuses have been updated, click the **Save** button. Save
16.	Click the **Define Course/Cost Details** link. Define Course/Cost Details
17.	Click the **Course Sessions** link. Course Sessions
18.	Enter the course code number into the **Course Code** field.
19.	Click in the **Course Session Nbr** field.
20.	Enter the course session number into the **Course Session Nbr** field.
21.	Click the **Search** button. Search
22.	Click the **Session Status** drop-down menu button.
23.	Select **Complete** from the list of values. Complete
24.	Click the **Save** button. Save

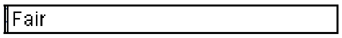
25.	You have successfully closed a course session. **End of Procedure.**

Appendix H – Evaluate a Course Session

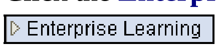
1.	Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Result Tracking** link. Result Tracking
3.	Click the **Evaluate Course Session** link.
4.	Enter the desired information into the **Course Code** field.
5.	Enter the desired information into the **Course Session Nbr** field.
6.	Click the **Search** button. Search
7.	In the **Ratings Area** you will need to follow the **Standard Rating Form** format and add rows of data to capture the correct information. The five areas are **Content, Facility, Instructors, Materials**, and **Presentation.** **Important**: Always remember to click the Plus Sign **(+)** before entering the ratings for your next area. Click the ***Rating Area** list.
8.	Click an entry in the list. Content
9.	Click the ***Rating** list.
10.	In the **Rating** field, select the appropriate rating: **Excellent, Good, Fair, or Poor.** Click an entry in the list. Excellent
11.	In the **Total Count Field**, enter the number of students who selected the rating. The system computes the **Rating Points** assigned to each rating. Enter the desired information into the ***Total Count** field.
12.	Click the **Add a new row** button.
13.	Click the ***Rating** list.
14.	Click an entry in the list. Fair

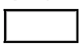
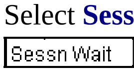
15.	Enter the desired information into the ***Total Count** field.
16.	Once we have completed all the students' ratings for **Content**, add a row to enter the next **Rating Area**. **Important**: Don't forget to click the **Plus Sign (+)** before entering the next **Rating Area**. Click the **Add a new row at row 1 (Alt+7)** button.
17.	Click the ***Rating Area** list.
18.	Click an entry in the list. Facility
19.	Click the ***Rating** list.
20.	Click an entry in the list. Excellent
21.	Enter the desired information into the ***Total Count** field.
22.	Click the **Add a new row** button.
23.	Click the ***Rating** list.
24.	Click an entry in the list. Good
25.	Enter the desired information into the ***Total Count** field.
26.	Click the **Add a new row** button.
27.	Click the ***Rating** list.
28.	Click an entry in the list. Fair
29.	Enter the desired information into the ***Total Count** field..
30.	Click the **Add a new row** button.
31.	Click the ***Rating Area** list.
32.	Click an entry in the list. Instructors
33.	Click the ***Rating** list.

34.	Click an entry in the list. Excellent
35.	Enter the desired information into the ***Total Count** field.
36.	Click the **Add a new row** button.
37.	Click the ***Rating Area** list.
38.	Click an entry in the list. Materials
39.	Click the ***Rating** list.
40.	Click an entry in the list. Good
41.	Enter the desired information into the ***Total Count** field.
42.	Click the **Add a new row** button.
43.	Click the ***Rating** list.
44.	Click an entry in the list. Fair
45.	Enter the desired information into the ***Total Count** field.
46.	Click the **Add a new row** button.
47.	Click the ***Rating Area** list.
48.	Click an entry in the list. Presentation
49.	Click the ***Rating** list.
50.	Click an entry in the list. Excellent
51.	Enter the desired information into the ***Total Count** field.
52.	Click the **Add a new row** button.
53.	Click the ***Rating** list.
54.	Click an entry in the list. Good
55.	Enter the desired information into the ***Total Count** field.

56.	Click the **Add a new row** button. 
57.	Click the ***Rating** list. 
58.	Click an entry in the list. 
59.	Enter the desired information into the ***Total Count** field.
60.	Click the scrollbar.
61.	Once you have entered all the ratings save your information. After you click the save button the system will calculate the overall session rating average. Click the **Save** button. 
62.	Click the scrollbar.
63.	Notice the **Session Average Rating** field has updated. You can also view individual **Rating Areas** by using the **Arrow** or **View All** keys located in the **Ratings Area**.
64.	**End of Procedure.**

Appendix I – Creating a Wait List

1.	Click the **Enterprise Learning** link. 
2.	Click the **Student Enrollment** link.
3.	Click the **Create/Update Course Wait List** link.
4.	Enter the desired information into the **Course Code** field.
5.	Click the **Search** button. 
6.	Use the **Course Wait List** page to add employees and non-employees to wait lists and assign the enrollment status. For this exercise, add two employees to the wait list. To add them to the wait list, specify their IDs in the **EmplID** field.
7.	Enter the desired information into the **EmplID** field.

8.	Assign a wait list status to the employee in the **Attendance** field. The PeopleSoft application provides a course wait list and a session wait list. Both of these statuses are used in the processing logic when enrolling students from a wait list to a session. The **course wait** option would be used when employees are interested in attending a course that does not have the required number of minimum students to schedule a course session. Click the **Attendance** drop-down menu button. 
9.	Select **Sessn Wait** from the list of values. **Session Wait** is used when a course session is full and an employee is awaiting a course opening. 
10.	The system populates a letter code from the **Standard Letter** table according to the student's wait list status. The system also populates the wait list date based on the current date. The PeopleSoft application uses this date to enroll students from the oldest date to the most recent date. You can override this date if the student requested for enrollment in the course on a different date. For this example, accept the default wait list date in the **Waitlst Dt** field.
11.	Click in the **Session #** field. 
12.	If you assign a session wait list status to a student, specify the session number from the list of Active sessions in the **Session #** field. Enter the session number information into the **Session #** field.
13.	Click the **Add a new row** button. 
14.	Enter the next employee ID number into the **EmplID** field for the next employee to be added to the list.
15.	Click the **Attendance** drop-down menu button. 
16.	Select **Sessn Wait** from the list of values. 
17.	Click in the **Session #** field. 
18.	Enter the course session number into the **Session #** field.
19.	Click the **Save** button. 

20.	You have successfully created a wait list. **End of Procedure.**

Appendix J – Viewing a Course Session Summary

1.	Click the **Enterprise Learning** link. 
2.	Click the **Result Tracking** link. 
3.	Click the **Review Session Summary** link. 
4.	Enter the course code number into the **Course Code** field.
5.	Click in the **Course Session Nbr** field. 
6.	Enter the course session number into the **Course Session Nbr** field.
7.	Click the **Search** button. 
8.	From the **Course Session Summary** page, each employee who attended the course, their attendance status, and the course grade (if applicable) can be viewed. PeopleSoft has a feature that allows for sorting any column that has a live link for a column heading. Click the **Status** link for the course attendance status column. 
9.	Note how the **Status** column sorted course attendance statuses alphabetically. Anytime the **Excel Grid** button is visible in PeopleSoft summaries or reports, the summary or report may be downloaded to a **MicroSoft Excel** spreadsheet by clicking on the button. 
10.	**End of Procedure.**

Appendix K – Viewing a Student Training Summary

1.	Begin by navigating to the **Student Training Summary** page. Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Result Tracking** link.
3.	Click the **Review Training Summary** link.
4.	Enter the desired information into the **EmplID** field.
5.	Click the **Search** button. Search
6.	Use the **Student Training Summary** page to view the summary of a student's training history.
7.	Click the **Status** tab. Status
8.	View a student's training history to determine whether the student has completed or passed a course. Notice that Martina has completed the Performance Management course with grade **P**, indicating Passed.
9.	In summary, you view an employee's training summary information to identify the courses that the employee has taken. **End of Procedure.**

Appendix L – Add an External Training Session

1.	Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Student Enrollment** link. Student Enrollment
3.	Click the **Enroll in Course** link. Enroll in Course
4.	Enter the employee ID number into the **Student Enrollment** field.
5.	Click the **Search** button. Search
6.	Click the **Add a new row (Alt+7)** button. +
7.	Press the **[Tab]** key.

8.	Press the **[Tab]** key.
9.	Enter the name of the course into the **Course Title** field.
10.	Click the **Internal/External** drop-down menu button.
11.	Select **External** from the list of values. External
12.	Click in the **Start Date** field.
13.	Enter the start date into the **Start Date** field.
14.	Press the **[Tab]** key.
15.	Enter the end date into the **End Date** field.
16.	Click in the **School Name** field.
17.	Enter the school name if available into the **School Name** field.
18.	Click the **Attendance** drop-down menu button.
19.	Select **Completed** from the list of values. Completed
20.	Click the **Training Reason** drop-down menu button.
21.	Select **Skill** from the list of values. Skill
22.	Scroll down the page to locate the **Save** button.
23.	Click the **Save** button. Save
24.	**End of Procedure.**

Appendix M – Add an External Trainee

1.	Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Add a Person** link. Add a Person
3.	Select **External Trainee** from the list of values. **Note:** The **External Instructor** value may be used to track external training providers. External Trainee

4.	Click the **Add the Person** button. Add the Person
5.	Click the **Add** button. Add
6.	Click the **Add Name** link. Add Name
7.	Enter the external trainee's first name into the **First Name** field.
8.	Enter the trainee's last name into the **Last Name** field.
9.	Click the **OK** button. OK
10.	The **Date of Birth** field should be left blank for an external trainee or instructor. The **Gender** field is a required field and **Male** or **Female** must be one of the selected values. The **Highest Ed Level** and **Marital Status** fields should be marked **Unknown** or **Not Indicated**. Click the ***Marital Status** field drop-down menu button.
11.	Select **Unknown** from the list of values. Unknown
12.	Click the ***National ID Type** field drop-down menu button.
13.	Select **Driver's License Number** from the list of values. Driver's License Number
14.	Enter the driver's license number into the **National ID** field.
15.	Click the **Contact Information** tab. Contact Information
16.	Click the **Add a new row (Alt+7)** button.
17.	Click the **Address Type** field drop-down menu button.
18.	Select **business** from the list of values. Business
19.	Click the **Add Address Detail** link. Add Address Detail
20.	Click the **Add Address** link. Add Address
21.	Enter the business address into the **Address 1** field.
22.	Enter the city into the **City** field.

23.	Enter the state into the **State** field.
24.	Enter the zip code into the **Postal** field.
25.	Enter the county into the **County** field.
26.	Click the **OK** button. OK
27.	Click the **OK** button. OK
28.	Click the **Delete row** button to delete the home address row. −
29.	Click the **OK** button. OK
30.	Select **Business** from the list of values. Business
31.	Enter the business phone into the **Telephone** field.
32.	Select **Business** from the list of values. Business
33.	Enter the business email into the ***Email Address** field.
34.	Click the **Organizational Relationship** tab. Organizational Relationships
35.	Click the **Add the Relationship** button. Add the Relationship
36.	Verify that the **Effective Date** field has the correct effective date or date of hire. Select **Business Unit** from the list of values. BUSINESS UNIT
37.	Enter your business unit into the **Value 1** field.
38.	Click the **OK** button.
39.	Click the **Checklist Code** drop-down menu button.
40.	Select **Add Person of Interest Inst.** from the list of values. Add Person of Interest Inst.
41.	Click the **Apply** button. Apply
42.	Click the **Go to Person Checklist** link. Go to Person Checklist
43.	Click the **Add Person of Interest Inst** link. **Note:** A pop up window will display to finish the transaction. Add Person of Interest Inst.

44.	Enter the reason into the **Reason code** field.
45.	Enter your business unit into the ***Business Unit** field.
46.	Enter the department associated with the external trainee into the ***Department** field.
47.	Press the **[Tab]** key.
48.	Click the **Job Information** tab.
49.	Enter the NONEMP into the ***Job Code** field.
50.	Click the **Payroll** tab.
51.	Click the **Payroll System** drop-down menu button.
52.	Select **Other** from the list of values.
53.	Click the **Save** button. **Note:** Be sure to record the employee id number before closing the record.
54.	**End of Procedure.**

Appendix N – Modify an External Trainee

1.	Click the **Workforce Administration** link.
2.	Under the **Personal Information** section, click the **Organizational Relationships** link.
3.	Click the **Add a POI Relationship** link.
4.	Enter the employee into the **EmplID** field.
5.	Enter 00007 into the **Person of Interest Type** field.
6.	Click the **Add** button.
7.	Click the **BUSINESS UNIT** list item.
8.	Enter the business unit into the **Value 1** field.
9.	Click the **Save** button.

10.	Click the **New Contingent Worker Instance** link in the menu on the left side of the screen.
11.	Enter the employee id into the **EmplID** field.
12.	Click the **Add** button.
13.	Enter the effective date into the **Effective Date** field.
14.	Enter the TRN into the **Look up (Alt+5)** field.
15.	Enter the business unit into the **Business Unit** field.
16.	Enter the department into the **Department** field.
17.	Click the **Job Information** tab.
18.	Enter NONEMP into the **Job Code** field.
19.	Click the **Payroll** tab.
20.	Click the **Payroll System** drop-down menu button.
21.	Select **Other** from the list of values.
22.	Click the **Save** button.
23.	**End of Procedure.**