

PeopleSoft Training Administration



2019

(updated Sept. 2020)

Training Coordinator User Guide

For Questions Contact:
learning@hamilton.ca



Contents

Training Administration	4
Overview	4
User Roles	5
Responsibilities Attached to Each Role:	6
Training Coordinators – Getting Started	7
The Role of the Training Coordinator	7
Training Administration Process Overview	8
Information to be Included in PeopleSoft	8
Basic PeopleSoft Navigation	9
Signing in to PeopleSoft	9
Navigation	11
Contact Information Set Up	12
Review Primary Email Address in PeopleSoft	12
Setting Phone Parameters:	14
Training Administration	16
Courses and Sessions	16
Viewing Courses in PeopleSoft	16
Requesting A New Course	19
Creating a Course Session	22
View Course Sessions in PeopleSoft	30
Creating a Split Session	33
Managing Enrollment	46
Enrolling an Employee into a Non-Session Course	46
Enrolling Employee(s) into a Course Session	49
Managing Training	54

Managing Course Attendance Status	54
Quick View of Attendance Status.....	54
Run the Administrator Student List (Session Summary)	56
Change Attendance Status in A Course Session	64
Running the Attendance Sheet Report	69
Closing the Course Session Status.....	76
Queries and Reports.....	83
Running Query Data.....	83
Queries and Reports.....	86
Running Report Data.....	86
Licenses and Certifications	93
Adding a License and/or a Certification	93
Appendix A: Fields and Descriptions for New Course Request Template	99
Appendix B: Course Session Profile Tab – Field Descriptions.....	102
Appendix C: Location, Instructor Profile Field Descriptions.....	103
Appendix D: Attendance Status	104
Appendix E: Enrollment Automated Email Notifications.....	105

Training Administration

Overview

The City of Hamilton's Training Administration system has been set up with the following objectives:

1. To create a single source of record for employee training data
2. To streamline and automate course enrolment
3. To automate manager approvals
4. To track certification and training expiry dates
5. To automate notifications to leaders, employees and administrators
6. To enable management of job specific training needs
7. To enable adherence to compliance standards for legislated requirements

The City employs the PeopleSoft module called "Administer Training" to enable the administration of record keeping for the organization's various training activities and needs. PeopleSoft enables the ease of enrolling, tracking, storing, and reporting on the organizations training data. As PeopleSoft is the primary finance and human resources software at use in the City, all employees have access to the system and Training Coordinators and leaders have access to all employee training records.

User Roles

The City of Hamilton has identified the following roles with responsibility to administer or utilize PeopleSoft Administer Training Module:

Training Administrator

Training Administrators are super users who have full access to all PeopleSoft training menus and core tables and oversees the functionality of the tool. This group includes the Human Resources Management Systems team and Organizational Development and Learning. In addition, key persons from Police and Library may have access as Administrators for their respective board or agency.

Training Coordinator

Training Coordinators are users who are designated to manage training within their departments or divisions. These users administer training sessions and will view most of the menus in the training system but will not have access to edit or update all setup tables and fields. This group will include staff who are identified by the City's departments and divisions.

Manager

The term "Manager" is intended to refer to direct people leaders.

Employee

The term "Employee" refers to all City of Hamilton employees who are active in PeopleSoft.

Workflow Administrator

The Workflow Administrator is a user who can take various administrative actions on a workflow process to ensure that the system is functioning appropriately. The Workflow Administrator does not generally administer training but has access to the entire system and is able to assist in workflow processes that are stuck for various reasons (ie: Manager on leave and did not delegate).

Responsibilities Attached to Each Role:

Activities	Training Administrator - Super User (HR)	Training Coordinator	Leader	Employee
Courses	Create, Edit, View	Request, View	View	View
Course Sessions	Create, Edit, View	Create, Edit, View	View	View
Enrol Students	Create, Edit, View	Create, Edit, View		Employee Self-enrollment
Change Attendance Status	Create, Edit, View	Create, Edit, View		
Employee Training Records	Update, Edit, View	Update, Edit, View	View	View
Close Course Sessions	Create, Edit, View	Create, Edit, View		
Training Reports and Queries	View, Run	View, Run	View, Run	
Add New License or Certification	Create, Edit, View	View		
Attach Licences and Certifications	Update, Edit, View	Update, Edit, View	View employee license or cert	View their own license or certification
Approval and Delegate Training Request			Update and Assign	
Add Vendor	Create, Edit, View	View, Request		
Add Facility	Create, Edit, View	View, Request		

Training Coordinators – Getting Started

The Role of the Training Coordinator

Training Coordinators are users who are designated to manage training within their departments or divisions and are provided with appropriate security to access PeopleSoft Training Administration. Coordinators have the ability to administer training sessions and will view most of the menus in the training system but will not have access to edit or update all setup tables and fields.

Training Coordinators perform the following functions:

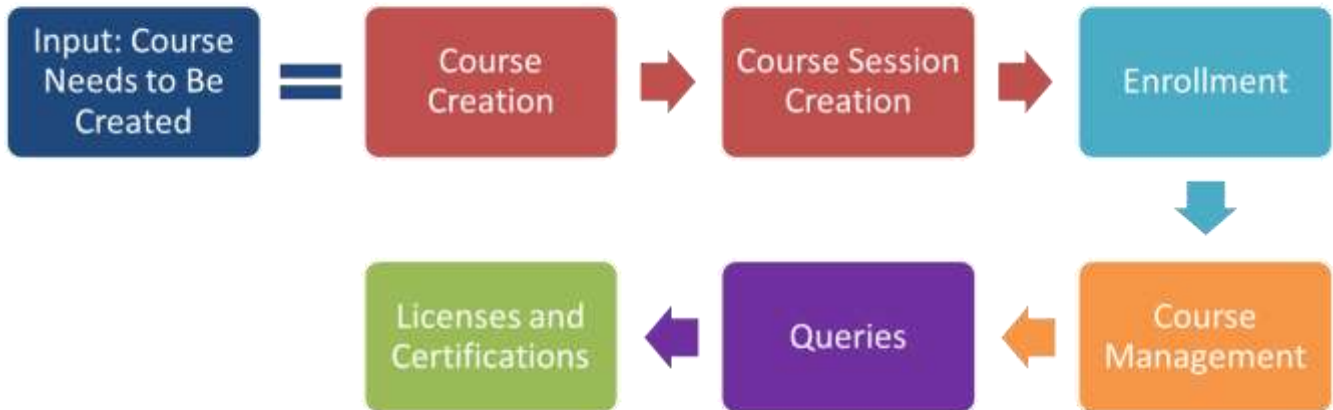
- Submit course request for new courses
- Creating and manage course sessions
- Enroll students
- Add licenses or certifications to student
- Manage waitlists
- Update training records
- Run reports and queries

Training Coordinators also have the ability to view training history for all employees, and can view license and certifications for employees within their departments and divisions

Training Coordinators are responsible for the following:

- Maintaining divisional training and licensing data in system
- Ensuring that data is maintained in PeopleSoft post-go live period
- Ensuring quality data is being entered into the system
- Administering PeopleSoft Training Administration for Division on an ongoing basis
- Ensuring that courses are closed off in timely manner
- Training additional Training Coordinators in section/division/department as necessary
- Educating leaders and employees about how to navigate and use the system
- Acting as resource to your section/division/department employees and leaders with regard to effective use of the system
- Providing feedback and suggestions on system enhancements and continuous improvement opportunities

Training Administration Process Overview



Information to be Included in PeopleSoft

Include in PeopleSoft	Do Not Include in PeopleSoft
Courses/Training that are required for everyone in that position	Courses/Training that are NOT required for everyone in that position
Courses/Training that are legislatively required	Courses/Training that are not aligned to the work of the City
Licenses and Certifications that are required for all employees in a position or are of value to the City	Non-courses such as webinars, conferences, lunch and learns unless valid reason
Information that is used and accessed by management on a regular basis**	Information that does not need to be accessed
Typically Paid for by the City	Typically one-off individual courses paid for by the employee
Reoccurring Registration	

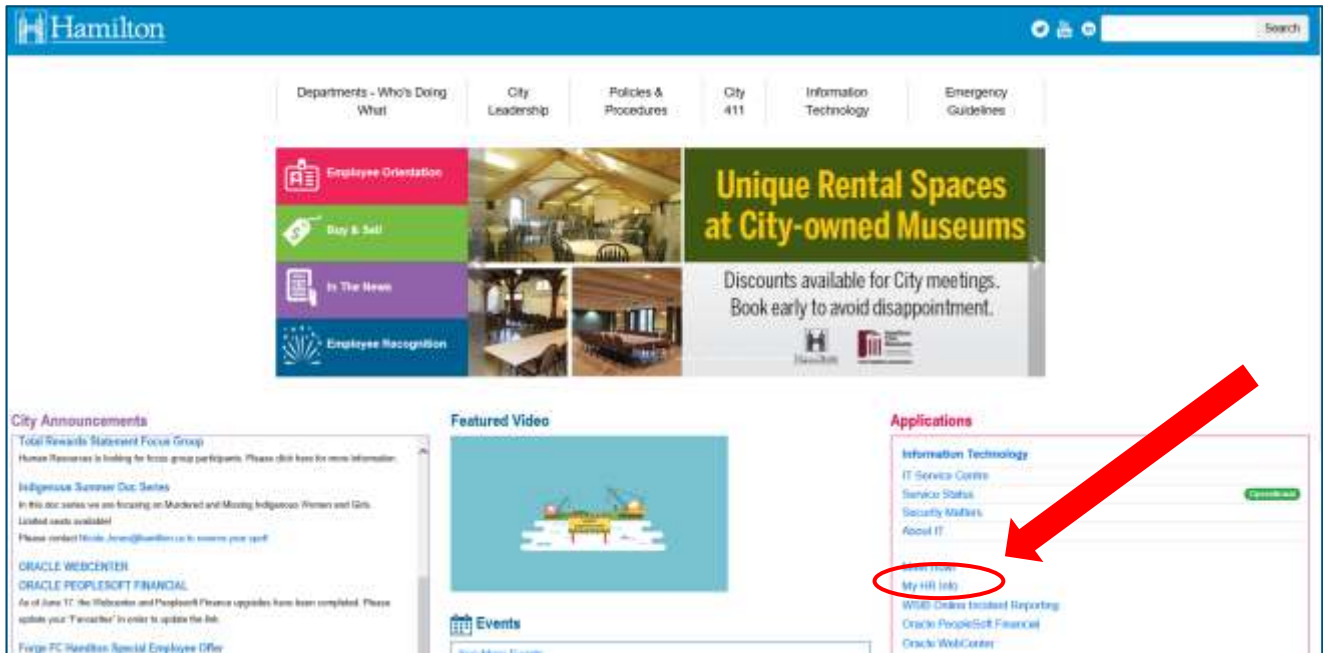
If in doubt of what courses, licenses or certifications to include in PeopleSoft, contact the Training Administrator at x5478 or learning@hamilton.ca

Basic PeopleSoft Navigation

Signing in to PeopleSoft

Step One: Open your Internet Browser and navigate to the eNet Home page.

Step Two: Click on 'My HR Info' under Applications. This will open the PeopleSoft sign in page.



Step Three: On the PeopleSoft Sign In page, enter your Network User ID (in caps) and your Password that was provided to you in an email from the Workflow Administrator.

As a Training Coordinator, you must use your Core PeopleSoft ID to log into the system. This is a different log in from your employee self-service log in.

Your Core User ID log in is as follows:

- A. Your Network Sign On in full caps. A maximum of **8 Characters**, which includes the first letter of your first name and up to the first seven letters of your last name.

Example:

- Aine Leadbetter = ALEADBET (8 characters)
- Darlene Power = DPOWER (6 characters)
- Jane Doe = JDOE (4 characters)

B. Your Password will be assigned and provided by the Workflow Administrator.

- If a Training Coordinator does not remember their password, use the “Forgot Password” option to obtain a new password.

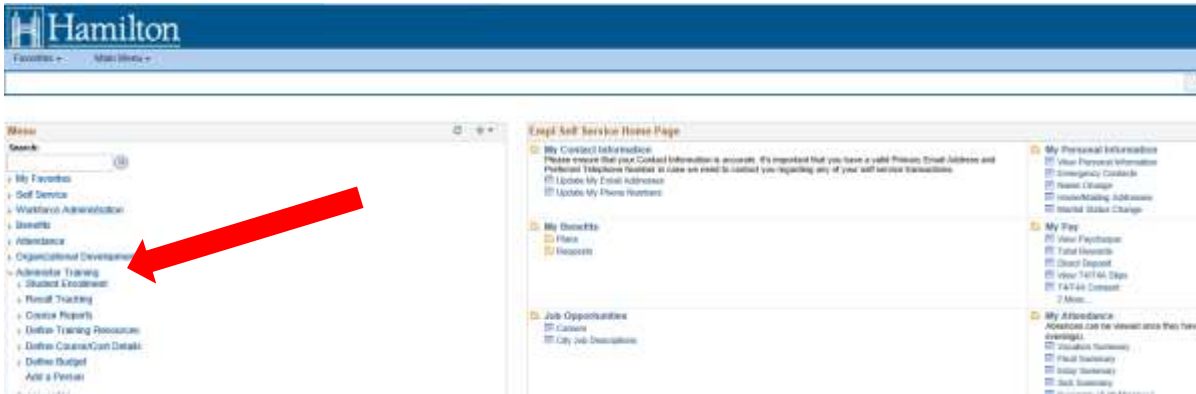


Step Four: Click the Sign In button

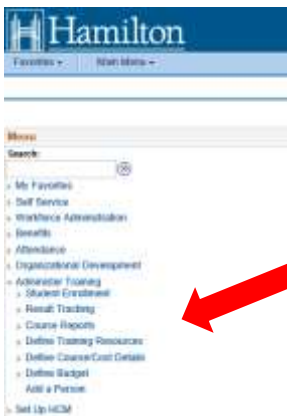
You are now signed in to PeopleSoft as a Core User!

Navigation

To access a specific module, click on the Module Name link. This is located on the left-hand side of the screen.



By clicking the arrow on the left of the module name, you will be able to view the functions/areas contained within that specific module.



By clicking on the title of the module, a new page will open where you will be able to view the functions/areas contained within that specific module.



Contact Information Set Up

Training Coordinators **MUST have a valid business email address and business phone number documented in PeopleSoft.** Without a valid email and phone number, Training Coordinators will not be able to view their course sessions and the session will not be available for enrollment.

Both business email and phone number must be checked off as 'primary' and 'preferred' in order to access, view, and manage course sessions that the Coordinator sets up. PeopleSoft uses these settings to identify an administrative role level's access to specific components within PeopleSoft.

Process to Change Email and Phone Number:

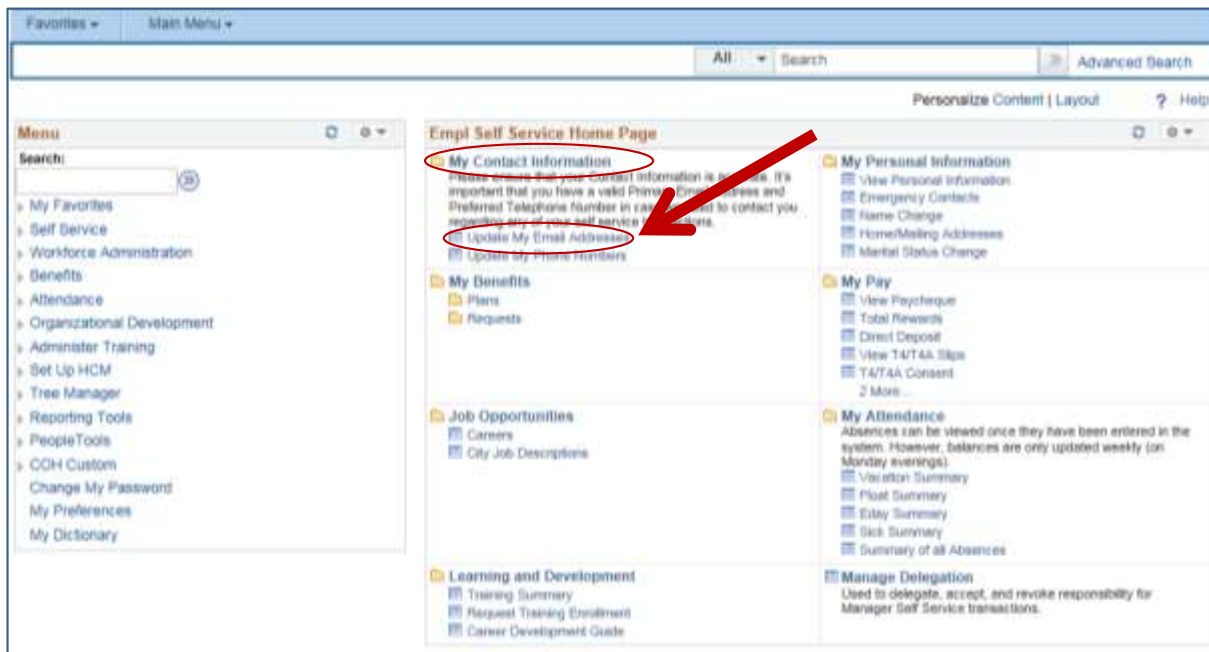
- 1) Training Coordinator navigates to Self Service Page.
- 2) In the 'My Contact Information' review email and phone number information.
- 3) Training Coordinators **MUST** ensure their business email address is set to Primary and business phone number is set to Preferred.

Review Primary Email Address in PeopleSoft

If a user has a City of Hamilton email address, this is automatically set to "primary" in the system and is not changeable. Training Coordinators should review to ensure that it correctly identifies their City email address. If it does not, attempt to change the email as per the steps below. If unsuccessful, contact the Training Administrator.

Step One: Navigate to “Update my Email Address” in the Employee Self Service Home Page.

Navigation: Log into PeopleSoft > go to Employee Self Service Home Page > My Contact Information > click Update My Email Addresses.



Step Two: Ensure your business email address is the “Primary Email Account” and save.

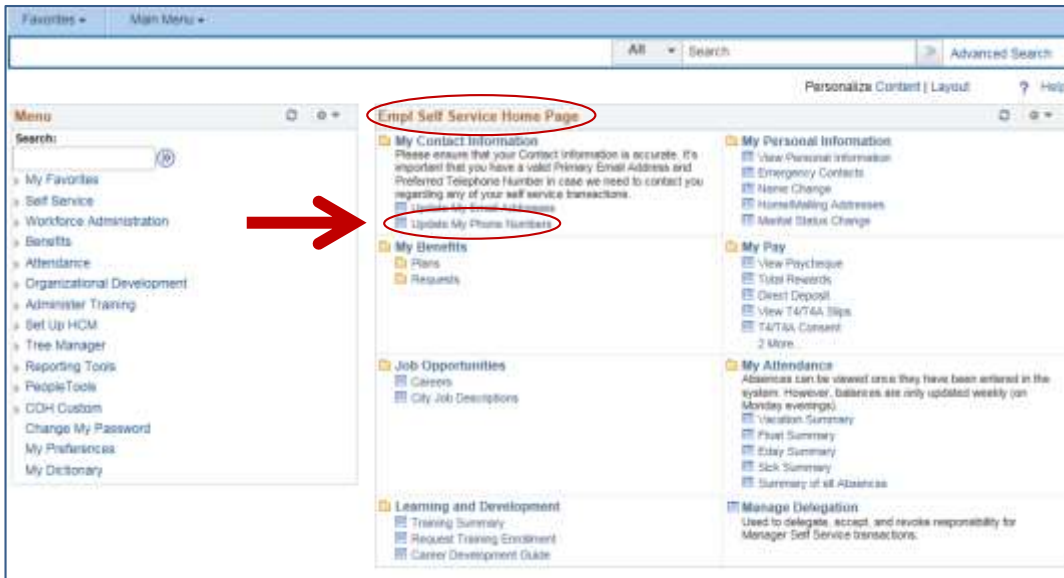
Navigation: On the **Email Addresses** page make sure your **business email address is checked off as 'Primary Email Account'** > click **Save** > click **Home** to return to My Contact Information Page.



Setting Phone Parameters:

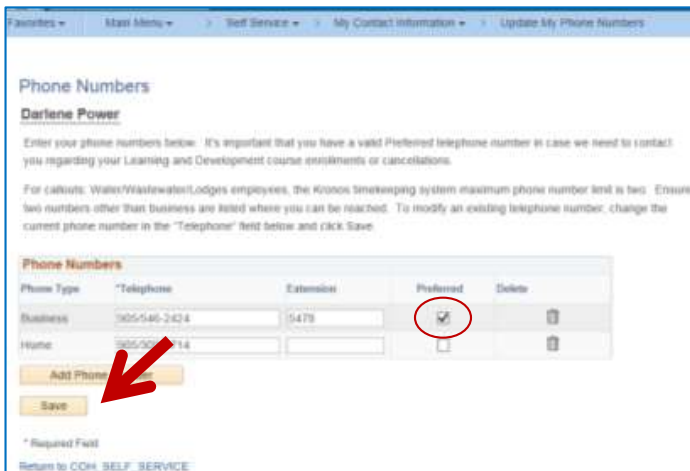
Step One: Navigate to “Update My Phone Numbers” from Employee Self Service Home Page

Navigation: On the Employee Self Service Home Page > under My Contact Information > click Update My Phone Numbers.



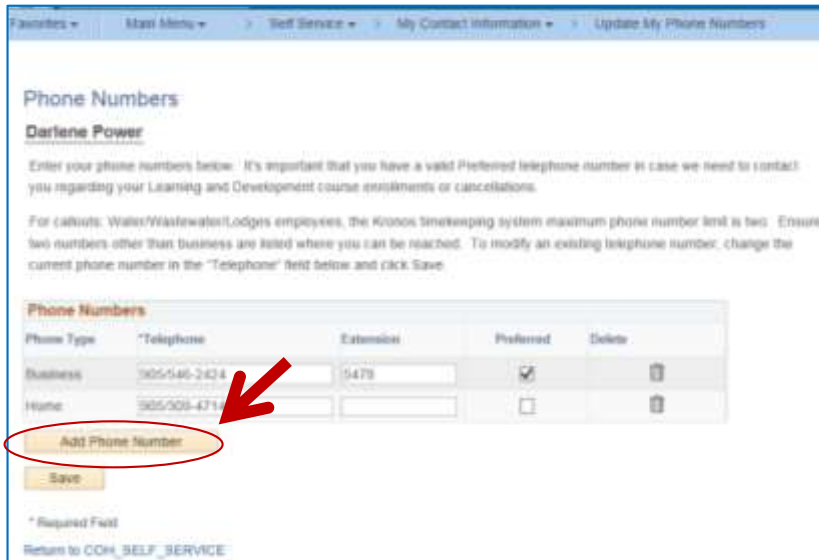
Step Two: Review Phone Numbers and select your business phone number as the “Preferred” and save.

Navigation: On the Phone Numbers page, your business phone number should be checked off as ‘Preferred’ > click Save > click Home to return to My Contact Information Page.



Step Three: If your Business phone number does not appear as an option, add your business number

Navigation: on the Phone Numbers page > click Add > add your number > click Save



The screenshot shows the 'Update My Phone Numbers' page for Darlene Power. It includes a table with columns for Phone Type, Telephone, Extension, Preferred, and Delete. The 'Add Phone Number' button is circled in red, and a red arrow points to it.

Phone Type	Telephone	Extension	Preferred	Delete
Business	905-546-2424	1479	<input checked="" type="checkbox"/>	
Home	905-509-4711		<input type="checkbox"/>	

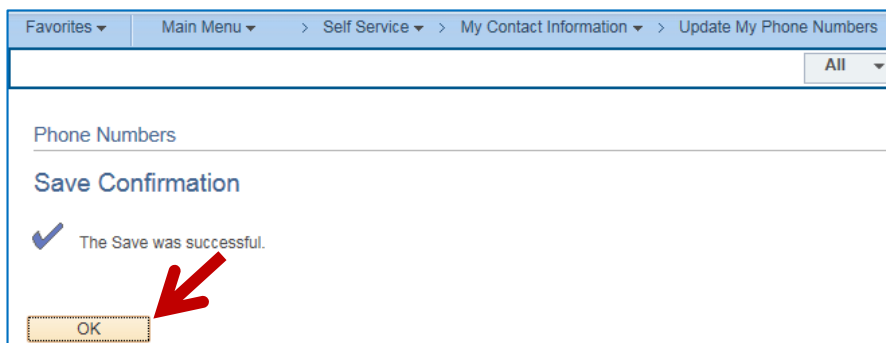
Add Phone Number

Save

* Required Field

[Return to COH_SELF_SERVICE](#)

Step Four: A confirmation message will appear once preferred phone number is saved. Click on "OK"



The screenshot shows a 'Save Confirmation' message with a checkmark icon and the text 'The Save was successful.' Below the message is an 'OK' button, which is highlighted with a red arrow.

Save Confirmation

The Save was successful.

OK

Training Administration

Courses and Sessions

Viewing Courses in PeopleSoft

Training Administrators can look up courses using course code, department naming convention, or the specific title of the course.

Step One: Navigate to “Find Existing Value” tab

Navigation: **Main Menu > Administer Training > Define Course/Cost Details > click Courses > Find an Existing Value tab will appear.**

Step Two: Under Course Code, type in the 6 digit course code.

Courses

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Course Code begins with

Description begins with

Internal/External =

Course Type =

Include History Case Sensitive

*Course Code is 6 digits.
(two letter department code followed by four numbers) OR use two letter department code for a list of department courses*

NOTE: for a list of Department Naming Conventions, see below.

BD – Building Division

CH – City Housing Hamilton

CE - Corporate Employees

CM - Corporate Management

CO – City Manager’s Office

CP – Corporate Services

FD – Hamilton Fire Department

HS - Healthy and Safe Communities

PE - Planning and Economic Development

PW – Public Works

RC – Recreation Division

Step Three: If the course code is not known, a search can be conducted using the title of the course or a word contained in the course title.

Navigation: In the **Description** field > type in the course title > OR click the drop down box and choose **'contains'**, then enter a word that the course title you are looking for may contain > click **Search**.

The screenshot shows the 'Courses' search interface. The 'Description' dropdown menu is set to 'contains' and the search term 'orientation' is entered. Red arrows point from callout boxes to these elements.

In Description, select "Contains"

Description uses the title of the course or a word in the title

Step Four: Click "Search." A list of courses with the associated word in the title will appear.

Step Five: Click the course that you want to view.

The screenshot shows the 'Courses' search interface with search results. The 'Description' field is circled in red, and the search results table is visible below.

Course Code	Description	Internal/External	Course Type	Creation Date
CM0005	CorpNewEmployeeOrientation-CM	Internal	N/A	11/16/2005
PL127	ERU Basic Tactical Orientation	External	N/A	01/27/2012
CE0005	NewEmployeeOrientation-CE	Internal	N/A	10/17/2008
CE0060	OPS Ambassador Orientation	Internal	N/A	06/14/2017

The Course screen will appear for you to view course information. On this page you will see the following:

Hamilton HR92CPRD

Favorites Main Menu Administer Training Define Course/Cost Details Courses

Course Profile Required Instr Comps/Accomps Prereqs Goals Equipment Catalog Description Related Course Codes

Course CE0005

*Title NewEmployeeOrientation-CE

Short Title NEO

Creation Date 10/17/2008

*Internal/External Internal

*Course Type N/A

*Primary Delivery Method Instructor Led Classroom

Min/Max Student 10 24

Duration Time 8.0

Course Units

School Code/School

Approval Required:

*Course Status Active

Revision Date

Session Administration

Multilingual Course

Instructor Comps/Accomps Req

Duration Unit Hour

Course Offering Quarterly

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

Course Profile | Required Instr Comps/Accomps | Prereqs Goals | Equipment | Catalog | Description | Related Course Codes

Step Six: To return to the Course Search Criteria page, select the “Return to Search” button.

Hamilton HR92CPRD

Favorites Main Menu Administer Training Define Course/Cost Details Courses

Course Profile Required Instr Comps/Accomps Prereqs Goals Equipment Catalog Description Related Course Codes

Course CE0005

*Title NewEmployeeOrientation-CE

Short Title NEO

Creation Date 10/17/2008

*Internal/External Internal

*Course Type N/A

*Primary Delivery Method Instructor Led Classroom

Min/Max Student 10 24

Duration Time 8.0

Course Units

School Code/School

Approval Required:

*Course Status Active

Revision Date

Session Administration

Multilingual Course

Instructor Comps/Accomps Req

Duration Unit Hour

Course Offering Quarterly

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

Course Profile | Required Instr Comps/Accomps | Prereqs Goals | Equipment | Catalog | Description | Related Course Codes

Requesting A New Course

Training Coordinators **do not** have the ability to set up a new course in PeopleSoft. When a Training Coordinator requires that a new course be set up they must submit an online request, accessed through PeopleSoft, and include key information to enable the creation of the course. This request is fulfilled by the Training Administrator, who creates the new course in PeopleSoft. Once the course has been created, the Training Coordinator will receive an email notification with course information.

To Add a New Course:

A new course is identified within a Department/Division/Section and information is given to the Training Coordinator to arrange for set-up in the system.

- 1) Training Coordinator searches PeopleSoft to ensure that this course does not currently exist in the system
- 2) Training Coordinator completes the New Course Set-Up Request Template.
- 3) New Course Set-Up Request is submitted automatically to the Training Administrator in Human Resources to set-up and assign a course code.
- 4) Once New Course Set-Up Request is processed, Training Coordinators receives an automated email confirming the course set-up and course code.
- 5) Course sessions can now be created for the course by the Training Coordinator.

Step One: Check PeopleSoft courses to ensure that this course does not already exist in the system. (see [Viewing Course in PeopleSoft](#))

Step Two: If there is no existing course in the system, complete the New Course Set-up Request Template.

1. Locate the New Course Set-Up Request Page in PeopleSoft, and click the link to set up a new course

Navigation: **Main Menu > COH Custom > Administer Training – Custom > New Course Set-up Request**

2. Enter the title of the course in the “Add a New Value” tab that appears. Click on “Add” to proceed.

Favorites > Main Menu > COH Custom > Administer Training - Custom > New Course Set-up Request

New Course Set-up Request

Add a New Value

User ID:

Effective Date 04/01/2019

Course Title:

Add

*30 character maximum.
The last 3 characters will consist
of a hyphen and the two letter
department code, eg. -PW*

Step Three: Provide information about the course as requested in the fields within each section.

1. Fill out required fields in the New Course Set-up Request. Required fields are identified with an asterisk *. Fields are identified in Appendix A: Fields and Descriptions for New Course Request Template

NOTE: All fields must be populated in order to submit successfully. If information in the open fields is not applicable, please indicate n/a in the box. If a required field is left empty, an error message will be received upon clicking save.

Below is an example of a completed request:

The screenshot shows a web form titled 'New Course Set-up Request' with the following sections and annotations:

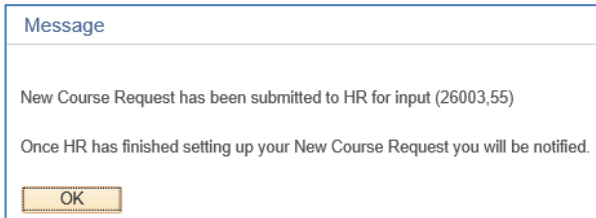
- Requestor:** User ID: []
- Course Profile:**
 - *Course Title: Test Course-PW (Annotation: *all course titles end with a hyphen and the two letter department code, eg -PW*)
 - *Internal/External: Internal
 - *Course Type: Core Comp
 - *Primary Delivery Method: self learning/Video
 - Min/Max Students: *Min # 10 *Max # 15
 - *Duration Time: 2.0
 - *Duration Unit: H
 - *Course Offering Occurrence: Quarterly
- Prerequisites/Goals:**
 - Prerequisite Course completion required? [] (Annotation: *If no prerequisite, leave blank*)
 - License/Certification: [] (granted to Employee after completion of course)
- Catalog Information:**
 - *Category Code: COMPETENC
 - *Subcategory Code: 3PEOPLELDR
- Description:**
 - *Course Title: Test Course for Practicing New course Set-Up
 - *Target Audience: Sr. Project Manager's and above
 - *Cost (per employee), if applicable: \$100 (Annotation: *If no cost, then insert n/a*)
 - Cost Paid By (if applicable, indicate your Department's name): Public Works
 - Course Content Information:
 - *Description: abc 123
 - Additional pertinent information/special instructions to be viewed by employee on-line: [] (Annotation: *If none, then insert n/a*)
- Does this course enrollment require manager approval? Yes: No:
- Save button

NOTE: Course Profile section - if 'External' is selected (ie. course is being delivered by an external vendor) and vendor information is not already in the system (check prior to filling out the 'New Course Set-Up Request', Training Coordinators will send a request to the Training Administrator to 'Add a Vendor Request'.

NOTE: Description section – all the information populated in the description section will be seen by the employee when they click on the course name through Employee Self Service > Learning & Development > Request Training Enrollment.

2. Once complete, **click Save.**

3. The Training Coordinator will receive an online message confirming that the New Course Request has been submitted for processing.



NOTE: Once the course is active in the system, the Training Coordinator will receive an automated email confirming the course set-up and course code.

Creating a Course Session

Once a course has been set up in PeopleSoft and a course code has been received from the Training Administrator, Training Coordinators are able to create sessions for the course. Course sessions are scheduled training sessions where the course is being run. Whenever a date and time has been established for a new class, Training Coordinators will create a new course session in PeopleSoft to allow employees to enroll into the course.

Process Overview:

- 1) Training Coordinator must populate the required fields for creating a new course session.
- 2) Once the session information is saved, the course session will automatically be assigned a session number and saved into PeopleSoft.
- 3) The session dates are now available for employees to view and enrol.

NOTE: You can create as many course session dates as required for a specific course using the course code each time.

Step One: Create a Course Session

1. Through the main menu, click on "Administer Training".
2. Click on "Define Course/Cost Details"
3. Click on "Course Session"
4. Click the "Add New Value" tab

Navigation: **Main Menu > Administer Training > Define Course/Cost Details > Course Sessions > click Add New Value tab.**

5. In the Course Code field, enter the 6-digit course code provided by email notification after the New Course Set-Up Request has been completed.

6. Select "Add". This will bring up the Course Session tab.

Step Two: Enter Course Session Profile Information

1. Populate the required tab fields with the appropriate information to create your course session. **DO NOT Press Save yet.**

NOTE: For List of Course Session Profile Tab Field Descriptions, see [Appendix B](#)

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

Course CE0084 retirement Course Status Active
Session Number 0000 School School Code

*Session Status Active Session Administration
*Start Date [B1] End Date [B1] Rescheduled
Start Time [] End Time []
Duration 2.0 Duration Unit Hour
Minimum Nbr of Students 10 Maximum Nbr of Students 15
Session Language []
Vendor ID []

4 fields to fill out. Other fields are defaulted using the course set-up info.

Leave Blank. Not used.

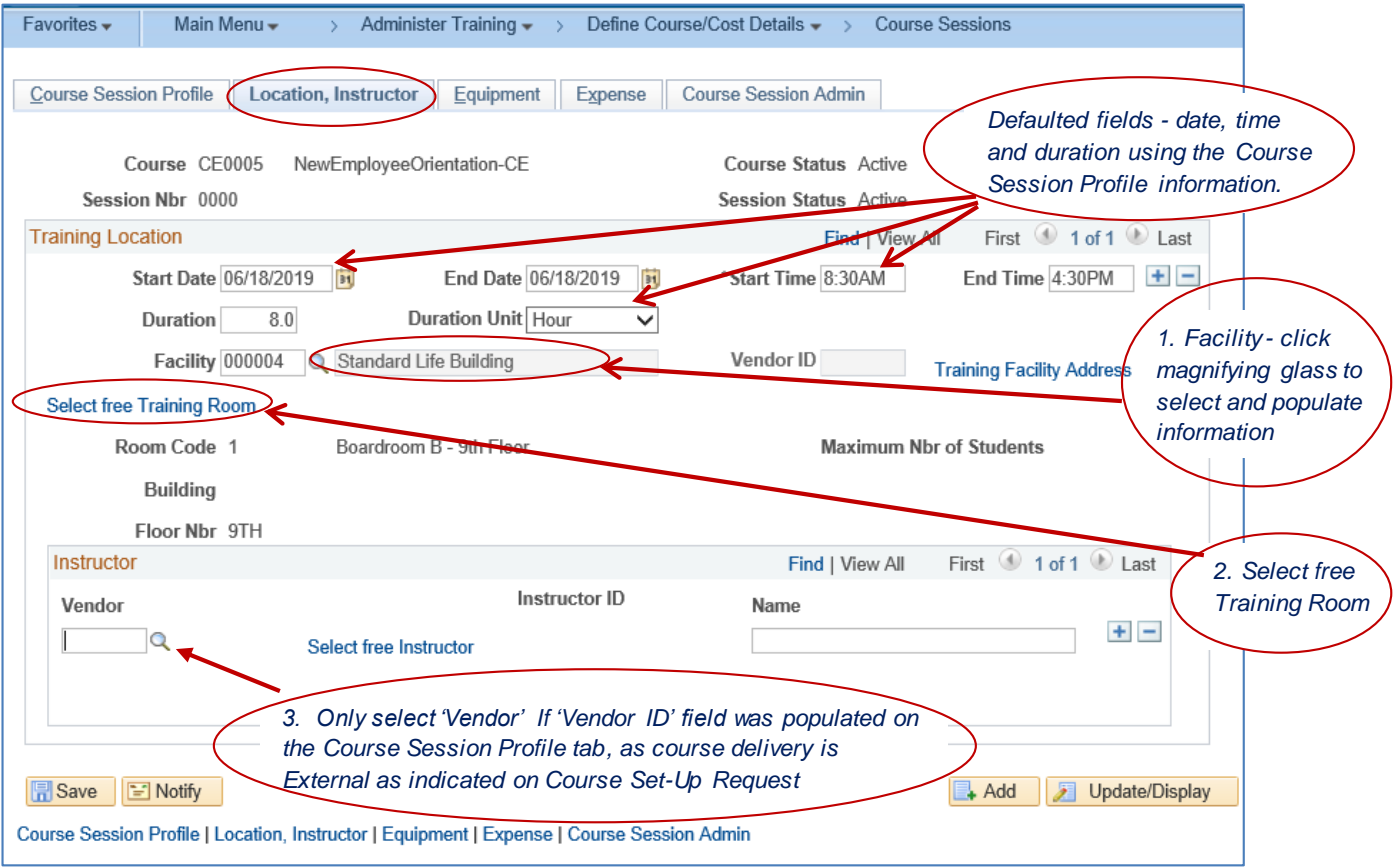
If delivered by an External vendor, as indicated on Course Set-up Request, select appropriate vendor name

Save Notify Add Update/Display

NOTE: Some fields are pre-populated by the system using the course information.

Step Three: Populate Location and Instructor Information

- 1. Click on the "Location, Instructor" tab.
- 2. Under Facility, click the magnifying glass and choose your booked facility.
- 3. Click Select free Training Room. **DO NOT click Save yet.**



NOTE: If a facility location is not on the list, contact to Human Resource Training Administrator to add to the list.

NOTE: See [Appendix C: Location Instructor Profile Field Descriptions.](#)

Step Five: Enter the Cost Associated with the Course Session

1. Select the “Expense” tab
2. Click on the magnifying glass next to the expense field to look up expense type

Course CE0005 NewEmployeeOrientation-CE Course Status Active
Session Nbr 0164 Session Status Active

Expense Find | View All First 1 of 1 Last

EMPLOYEE Employee

Save Return to Search Previous in List Next in List Notify Add Update/Display

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

The “Look Up Expense Type” Table will appear

3. Select “employee” if cost is per employee or Select “flat” if there is a flat fee for the entire course.

Look Up Expense Type Help

Tuition Expense Type begins with
Description begins with

Look Up Clear Cancel Basic Lookup

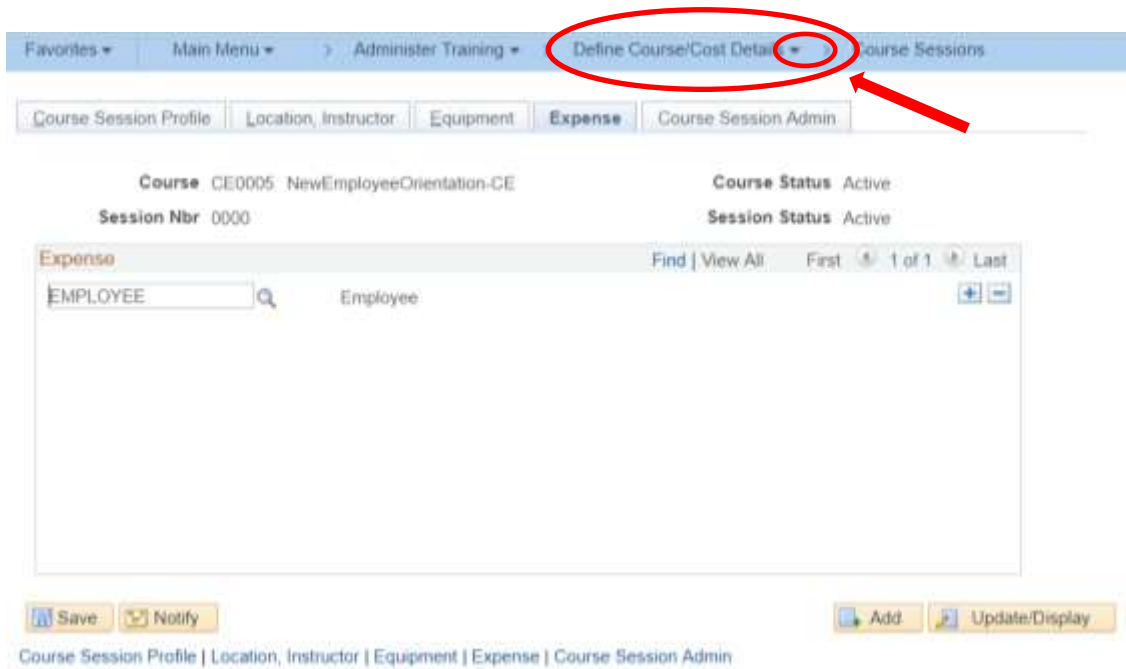
Search Results

View 100 First 1 of 2 Last

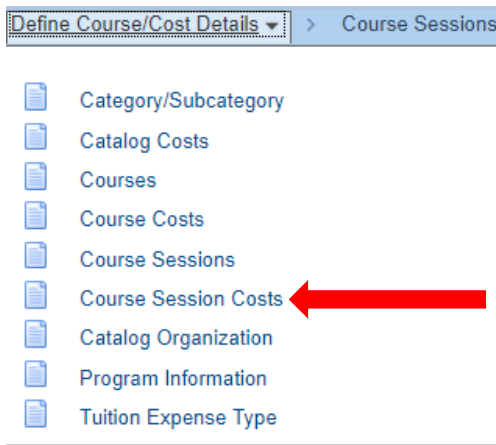
Tuition Expense Type	Description
EMPLOYEE	Employee
FLAT	Flat Cost

4. Click **'Save'**

5. At the top of the page **'Define Course/Cost Details, Select the drop-down arrow**



6. From the drop down list, **select "Course Session Costs"**



7. When the “Course Session Costs Table” appears, **click on the “Expense” Tab**

Favorites ▾ Main Menu ▾ > Administer Training ▾ > Define Course/Cost Details ▾ > Course Session Costs

Vendor | Facility, Instructor | Equipment | **Expense**

Course CE0005 NewEmployeeOrientation-CE **Course Status** Active
Session Nbr 0165 **Session Status** Active
Start Date 08/15/2019

Session Expenses Find | View All First 1 of 1 Last

Expense Type EMPLOYEE
Per Unit Cost
Cost Unit Hour
Business Unit

Currency CAD
Quantity 1
Department

[Vendor](#) | [Facility, Instructor](#) | [Equipment](#) | [Expense](#)

8. **Choose the appropriate Cost Unit** from the drop-down menu

9. **Enter the cost** in the “Per Unit Cost” field


10. **Press ‘Save’**

Step Six: Return to the course session and select Course Session Admin

Navigation: Click 'Define Course Detail/Cost Details' > select 'Course Sessions'

NOTE: The last course session you were working on will appear. If the course session is incorrect, click "Return to Search" at the bottom of the page and enter course code associated with the course you are creating the new session for.

The screenshot shows a web application interface for managing course sessions. The breadcrumb trail at the top indicates the user is in the 'Define Course/Cost Details' section, specifically on the 'Course Sessions' page. The 'Course Session Admin' tab is active. The form displays course information: 'Course: CE0005 NewEmployeeOrientation-CE' and 'Session Nbr: 0162'. The 'Session Administrator' field is empty, and a red arrow points to it from the text 'Defaulted Automatically' which is circled in red. The 'Special Instructions' field is a large empty text area. At the bottom are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

1. A session number will be automatically created and populated in the course
2. If required, you can override the defaulted Employee ID with another Training Coordinator's ID if required. To change the existing value, simply override with the new Employee ID or click  to search

NOTE: The Session Administrator's ID is extracted from this page and used to provide contact information in the Training Notification Emails, Training Reports, and Learning & Development Self Service.

3. Click "Save"

The session date is now available for employees to view and enroll through PeopleSoft.

View Course Sessions in PeopleSoft

Once a session has been created, Training Coordinators can view the list of available sessions attached to a course to ensure that their session has been added.

Step One: Navigate to the Course Sessions Table

Navigation: Main Menu > Administer Training > Define Course/Cost Details > Course Sessions

Step Two: In the “Find an Existing Value” Tab, enter the Course Code.

Course Sessions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ **Search Criteria**

Course Code	begins with ▼	<input type="text"/>	<input type="button" value="🔍"/>
Course Session Nbr	begins with ▼	<input type="text"/>	
Description	begins with ▼	<input type="text"/>	
Course Start Date	= ▼	<input type="text"/>	<input type="button" value="📅"/>
Course End Date	= ▼	<input type="text"/>	<input type="button" value="📅"/>
Session Status	= ▼	<input type="text"/>	▼

Case Sensitive

Search Clear Basic Search Save Search Criteria

Step Three: Click “Search.” A list of sessions associated with the course will appear.

Course Sessions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Course Code begins with CE0005

Course Session Nbr begins with

Description begins with

Course Start Date =

Course End Date =

Session Status =


Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-100 of 164 Last

Course Code	Course Session Nbr	Description	Course Start Date	Course End Date	Session Status
CE0005	0001	NewEmployeeOrientation-CE	12/09/2008	12/09/2008	Complete
CE0005	0002	NewEmployeeOrientation-CE	01/13/2009	01/13/2009	Complete
CE0005	0003	NewEmployeeOrientation-CE	02/10/2009	02/10/2009	Cancelled
CE0005	0004	NewEmployeeOrientation-CE	03/10/2009	03/10/2009	Complete
CE0005	0005	NewEmployeeOrientation-CE	04/15/2009	04/15/2009	Cancelled
CE0005	0006	NewEmployeeOrientation-CE	05/12/2009	05/12/2009	Complete
CE0005	0007	NewEmployeeOrientation-CE	06/09/2009	06/09/2009	Complete
CE0005	0008	NewEmployeeOrientation-CE	07/14/2009	07/14/2009	Cancelled
CE0005	0009	NewEmployeeOrientation-CE	08/11/2009	08/11/2009	Complete



Step Four: Review the list of sessions returned in the search results to ensure that the new session has been added.

Step Five: Click on session to bring up session information.

Session Information...

The screenshot shows a web application interface for managing course sessions. At the top, there are several tabs: 'Course Session Profile' (highlighted with a red circle), 'Location, Instructor', 'Equipment', 'Expense', and 'Course Session Admin'. Below the tabs, the course details are displayed: Course CE0005, NewEmployeeOrientation-CE, Course Status Active, Session Number 0164, and School. A horizontal line separates the header from the form fields. The form includes: '*Session Status' dropdown set to 'Active'; '*Start Date' (08/19/2019) and 'End Date' (08/19/2019) date pickers; 'Start Time' (8:00AM) and 'End Time' (4:00PM) time pickers; 'Duration' (8.0) and 'Duration Unit' (Hour) dropdown; 'Minimum Nbr of Students' (10) and 'Maximum Nbr of Students' (24) input fields; 'Session Language' and 'Vendor ID' input fields. At the bottom, there is a row of buttons: 'Save', 'Return to Search' (highlighted with a red circle), 'Previous in List', 'Next in List' (highlighted with a red circle), 'Notify', 'Add', and 'Update/Display'. Below the buttons is a breadcrumb trail: 'Course Session Profile | Location, Instructor | Equipment | Expense | Course Session Admin'.

Step Six: To view the next session date, Click 'Next in List'. To return to the Course Session Home Page to view a different course session, Click 'Return to Search'

NOTE: if this is attempted numerous times and sessions are not appearing, contact the Training Administrator to troubleshoot. You may have forgotten to click 'Save' when you created the new session.

Creating a Split Session

Training Coordinators can create a Split Session if a course session is being held on non-consecutive dates/times, different locations, or where there is more than one primary delivery method. For example, a split session would be used in a course where there was an online component in addition to classroom delivered component, or where day one of the session was held ten days prior to day two of the course.

Process Overview:

- 1) Using the course code received from Training Administrator, the Training Coordinator can create course sessions of dates for employees to enroll into.
- 2) Training Coordinator will populate the required fields for creating a new course session.
- 3) To create a split session, the same steps for creating a single session are followed in addition to inserting rows on the Location, Instructor tab.
- 4) Once the session information is saved, the course session will automatically be assigned a session number and saved into PeopleSoft.
- 5) The session dates are now available for employees to view and enroll into.

NOTE: You can create as many split course sessions as required for a specific course using the course code each time.

Step One: Navigate to Course Session, Add New Value Tab

Navigation: Main Menu > Administer Training > Define Course/Cost Details > Course Sessions > click Add A New Value tab.

The screenshot shows the 'Course Sessions' page in PeopleSoft. The breadcrumb trail at the top reads: 'Main Menu > Administer Training > Define Course/Cost Details > Course Sessions'. Below the breadcrumb, there is a search bar with two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is circled in red, and a red arrow points to it from the right. Below the search bar, there is a 'Search Criteria' section with several fields: 'Course Code' (begins with), 'Course Session Nbr' (begins with), 'Description' (begins with), 'Course Start Date' (=), 'Course End Date' (=), and 'Session Status' (=). There is also a 'Case Sensitive' checkbox. At the bottom of the search criteria section, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. At the very bottom of the page, there is a link: 'Find an Existing Value | Add a New Value'.

Step Two: Enter the 6-digit course code provided by the Training Administrator and click on “Add”

Navigation: under **Add a New Value > Course Code > type the 6-digit course code > click Add.**

Course Sessions

Find an Existing Value Add a New Value

Course Code CM0077

Course Session Nbr

Add

Find an Existing Value | Add a New Value

The system automatically assigns a number upon completion of set-up at the last step.

REMINDER: course codes are assigned by the Training Administrator and emailed to Training Coordinator upon completion of the New Course Set-up Request.

Step Three: Fill in Course Session Profile information

Once the “add” button is clicked, a Course Session tab will appear.

Fill in the four fields: Start Date, End Date, Start Time and End Time

The start and end date entered are for the **entire session**. We will be splitting the session into sections in following steps.

Favorites ▾ Main Menu ▾ > Administer Training ▾ > Define Course/Cost Details ▾ > Course Sessions

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

Course CM0077 Ethics,Trust,Respsbly-LOI-CM Course Status Active
 Session Number 0000 School School Code

*Session Status Session Administration

Start Date End Date Rescheduled

Start Time End Time

Duration Duration Unit

Minimum Nbr of Students Maximum Nbr of Students

Session Language

Vendor ID

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

4 fields to fill out. End Date is the last day of the full session.

Leave Blank. Not used.

DO NOT click Save yet.

NOTE: Some of the fields are pre-populated automatically by the system using the Course Table information.

See [Appendix B: Course Session Profile Field Descriptions](#) for explanation of fields.

Step Four: Click on Location, Instructor Tab

NOTE: Date, Time and Duration fields will be automatically populated using the Course Session Profile data.

The screenshot shows a web-based application interface for managing course sessions. The breadcrumb trail at the top indicates the path: Favorites > Main Menu > Administer Training > Define Course/Cost Details > Course Sessions. The 'Location, Instructor' tab is selected and highlighted with a red circle. The course details are: Course CM0077 (Ethics, Trust, Responsibility-LOI-CM), Course Status Active, Session Nbr 0000, and Session Status Active. The 'Training Location' section includes fields for Start Date (06/03/2019), End Date (06/07/2019), *Start Time (8:30AM), and End Time (4:30PM). The Duration is set to 5.0 with a unit of Day. Below this are search fields for Facility and Vendor ID, and a section for selecting a free training room with fields for Room Code, Building, and Floor Nbr. The 'Instructor' section has search fields for Vendor, Instructor ID, and Name. At the bottom, there are buttons for Save, Notify, Add, and Update/Display. A red callout box on the right side of the screen points to the date, time, and duration fields, stating: 'Fields automatically populated date, time and duration'.

NOTE: Refer to Appendix C: Location, Instructor Profile list below for details on fields and descriptions.

Step Five: Override Default End Date to reflect the end date of the **first part** of the session

If applicable, adjust the Start/End times for the first part of the session.

DO NOT click Save yet.

NOTE: In the following example, the end date entered in the Course Session Profile Tab (Step Three) was entered as 06/07/2019. We are now changing the end date to 06/06/2019 as this is the first part of the session.

NOTE: In the following example, the duration was changed to 4 days to match the Start/End date of the first part of the session.

The screenshot shows the 'Define Course/Cost Details' > 'Course Sessions' page. The 'Location, Instructor' tab is selected. The 'Training Location' section contains the following fields:

- Start Date: 06/03/2019
- End Date: 06/06/2019
- Duration: 4.0
- Duration Unit: Day
- Start Time: 8:30AM
- End Time: 4:30PM

Red circles and arrows highlight the End Date, Duration, and End Time fields. Callouts provide instructions:

- 1. Change the End Date/ Duration to reflect the first part of the session.
- 2. Change Time if applicable.

At the bottom, there are buttons for Save, Notify, Add, and Update/Display.

Step Six: Choose the Training Room by Selecting the Magnifying Glass next to the “Facility” Field.


The screenshot shows a web application interface for defining course/cost details. The breadcrumb trail is: Favorites > Main Menu > Administer Training > Define Course/Cost Details > Course Sessions. The 'Location, Instructor' tab is selected. Course details include Course CM0077 (Ethics, Trust, Respsblyt-LOI-CM) and Session Nbr 0000. The 'Training Location' section has fields for Start Date (06/03/2019), End Date (06/06/2019), *Start Time (8:30AM), End Time (4:30PM), Duration (1.0), and Duration Unit (Week). The 'Facility' field is highlighted with a red circle and a magnifying glass icon. Below it, the 'Select free Training Room' section is also highlighted with a red circle and an arrow pointing to the 'Facility' field. The 'Instructor' section has a 'Vendor' field with a magnifying glass icon and a 'Select free Instructor' link. At the bottom, there are buttons for Save, Notify, Add, and Update/Display.

3. Facility - click magnifying glass to select location, if applicable

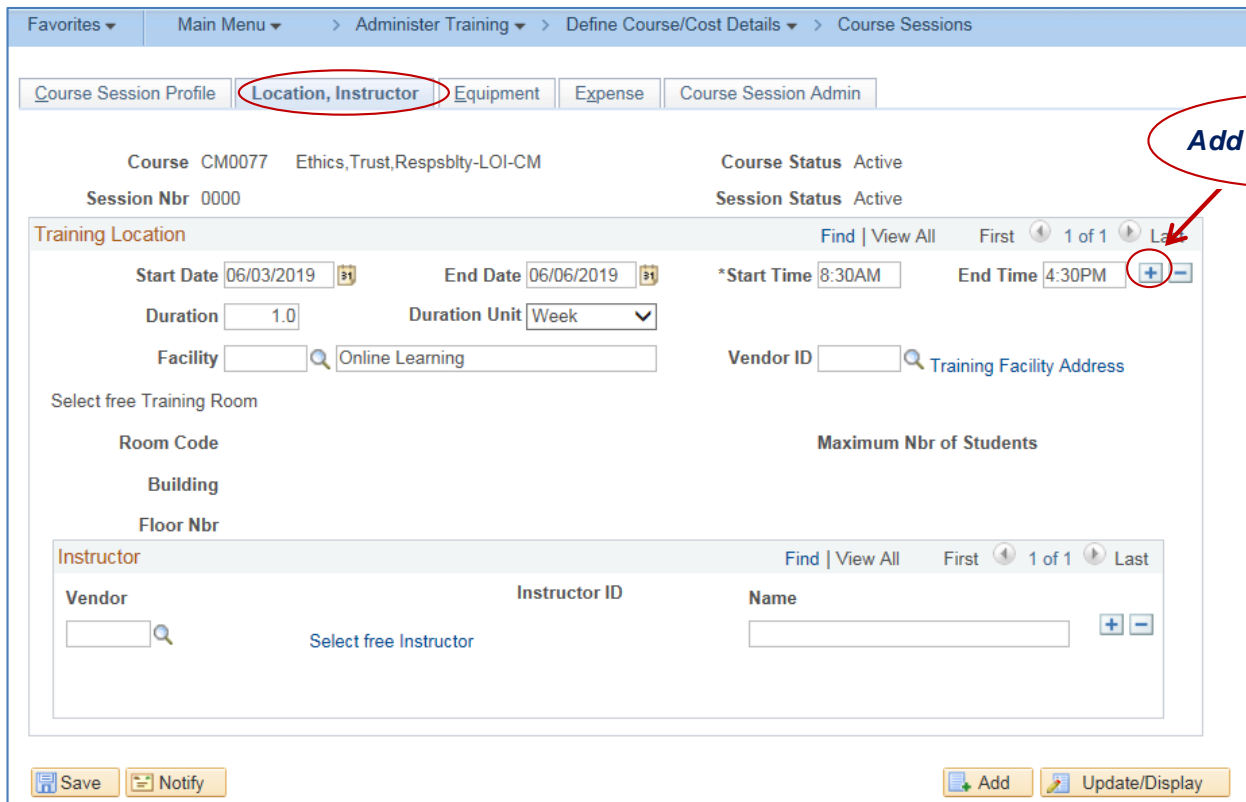
4. Select free Training Room

DO NOT click Save Yet.

NOTE: If a facility location is not on the list, complete email Human Resource Training Administrator to add to the list.

Step Seven: Enter the information for the last part of the session. Click  to add a new Training Location row

NOTE: You can create as many new Training Location rows as required



The screenshot shows a web application interface for managing course sessions. The breadcrumb trail is: Favorites > Main Menu > Administer Training > Define Course/Cost Details > Course Sessions. The 'Location, Instructor' tab is selected and circled in red. The course details are: Course CM0077 Ethics,Trust,Respsbly-LOI-CM, Course Status Active, Session Nbr 0000, Session Status Active. The 'Training Location' section includes fields for Start Date (06/03/2019), End Date (06/06/2019), *Start Time (8:30AM), End Time (4:30PM), Duration (1.0), Duration Unit (Week), Facility (Online Learning), Vendor ID, and Training Facility Address. There are 'Select free Training Room' and 'Select free Instructor' buttons. The 'Training Location' table has a '+ -' button circled in red with an arrow pointing to a callout box that says 'Add a new Row.' The 'Instructor' table also has a '+ -' button. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons.

Step Eight: Create the remaining components of the session by repeating the steps used to create the first part of the session.

REMINDER: override the defaulted Start/End Date to reflect the end date of the last part of the session > change the Duration fields to match the Start/End Date > if applicable, adjust the Start/End times for the last part of the session.

NOTE: In this example, to create an additional section, the Start/End Date was changed to 06/07/2019. The Duration was changed to 1 day.

The screenshot shows a software interface for defining course sessions. The breadcrumb trail at the top reads: Favorites > Main Menu > Administer Training > Define Course/Cost Details > Course Sessions. The interface includes several tabs: Course Session Profile, Location, Instructor, Equipment, Expense, and Course Session Admin. The current session is for Course CM0077 (Ethics, Trust, Respsbilty-LOI-CM) with Session Nbr 0000. The Training Location section is active, showing Start Date 06/07/2019, End Date 06/07/2019, *Start Time 8:30AM, and End Time 4:30PM. The Duration is set to 1.0 with a unit of Day. The Facility is selected as 00004 Standard Life Building. Below this, there are fields for Room Code, Building, and Floor Nbr, along with a 'Select free Training Room' button. The Instructor section shows a 'Select free Instructor' button. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons. Four red callout boxes with arrows point to specific elements: 1. Start/End Date and Duration fields; 2. Start and End Time fields; 3. The magnifying glass icon next to the Facility field; 4. The 'Select free Training Room' button.

1. Change the Start/End Date and the Duration for the last part of session.

2. Change Time if applicable.

3. Facility - click magnifying glass to select location, if applicable

4. Select free Training Room

NOTE: Do NOT click Save yet.

Step Nine: Once all parts of the session have been created, view all the Training Locations that you created to ensure the accuracy of entries.

Navigation: click 'View All' to review all the parts of the session you set up.

The screenshot displays the 'Location, Instructor' tab within the 'Course Sessions' application. The breadcrumb trail at the top reads: 'Favorites > Main Menu > Administer Training > Define Course/Cost Details > Course Sessions'. The current page title is 'Location, Instructor'. The course information is 'Course CM0077 Ethics, Trust, Respsbly-LOI-CM' and 'Session Nbr 0000'. The 'Course Status' and 'Session Status' are both 'Active'. The 'Training Location' section includes a 'Find | View All' link, which is circled in red and pointed to by a red arrow. Below this are fields for 'Start Date' (06/07/2019), 'End Date' (06/07/2019), '*Start Time' (8:30AM), and 'End Time' (4:30PM). There are also fields for 'Duration' (1.0), 'Duration Unit' (Day), 'Facility' (000004), and 'Vendor ID'. The 'Select free Training Room' section has fields for 'Room Code', 'Building', and 'Floor Nbr'. The 'Select free Instructor' section has fields for 'Vendor', 'Instructor ID', and 'Name'. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons.

NOTE: Start Date of the first part and the End date of the last part of the created sessions must match the Start/End Date in the Course Session Profile. If these do not match, you will not be able to save.

NOTE: The total of the Duration for all session parts must equal the Duration in the Course Session Profile.

Image A: After clicking 'View all' this is how it will appear for multiple training dates/locations for the course session, so you can review all the information that you set-up.

Course CM0077 Ethics,Trust,Respsblty-LOI-CM Course Status Active
Session Nbr 0000 Session Status Active

Location, Instructor Equipment Expense Course Session Admin

Find | **View 1** First 1-2 of 2 Last

Start Date 06/03/2019 End Date 06/06/2019 *Start Time 8:30AM End Time 4:30PM
Duration 4.0 Duration Unit Day
Facility On-line learning Vendor ID Training Facility Address

Select free Training Room

Room Code	Maximum Nbr of Students
Building	
Floor Nbr	

Instructor Find | View All First 1 of 1 Last

Vendor	Instructor ID	Name
Select free Instructor		

Start Date 06/07/2019 End Date 06/07/2019 *Start Time 8:30AM End Time 4:30PM
Duration 1.0 Duration Unit Day
Facility 000004 Standard Life Building Vendor ID Training Facility Address

Select free Training Room

Room Code	Maximum Nbr of Students
Building	
Floor Nbr	

Instructor Find | View All First 1 of 1 Last

Vendor	Instructor ID	Name
Select free Instructor		

Image B: Course Session Profile

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

Course CM0077 Ethics,Trust,Respsbly-LOI-CM Course Status Active

Session Number 0000 School School Code

*Session Status Active Session Administration

*Start Date 06/03/2019 Rescheduled End Date 06/07/2019

Start Time 8:30AM End Time 4:30PM

Duration 5.0 Duration Unit Day

Minimum Nbr of Students 16 Maximum Nbr of Students 25

Session Language

Vendor ID

Save Notify Add Update/Display

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

In Image A example, on the previous page, the 'Location, Instructor' tab information of the **Start date of the first part of the course (06/03/2019)** and the **End Date of the last part of the Course (06/07/2019)**, and the total **Duration from both parts MUST match Image B: the Course Session Profile.**

NOTE: If the information does not match, you will get an error code and will be required to go back and correct the entries.

Step Ten: Complete the Course Session

Navigation: click **Course Session Admin** tab.

NOTE: Session Number is defaulted as 0000. Session Administrator's Employee # and Name are automatically populated (defaulted by your User ID login).

The screenshot shows a web application interface for managing course sessions. The breadcrumb trail is: Favorites > Main Menu > Administer Training > Define Course/Cost Details > Course Sessions. The 'Course Session Admin' tab is selected and circled in red. The form displays the following information:

- Course:** CM0077 Ethics,Trust,Respsbilty-LOI-CM
- Course Status:** Active
- Session Nbr:** 0000
- Session Status:** Active
- *Session Administrator:** [Empty search field]
- Special Instructions:** [Empty text area]

At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'. A red oval labeled 'Defaulted Automatically' has arrows pointing to the 'Session Nbr' and the '*Session Administrator' field.

Step Eleven: Save Course Session

Navigation: click **Save** > a session number will automatically be assigned.

Favorites ▾ Main Menu ▾ > Administer Training ▾ > Define Course/Cost Details ▾ > Course Sessions

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

Course: CM0077 Ethics, Trust, Respsblty-LOI-CM Course Status: Active
Session Nbr: 0004 Session Status: Active

*Session Administrator

Special Instructions

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

NOTE: The Session Administrator's ID is extracted from this page and used to provide contact information in the Training Notification Emails, Training Reports, and Learning & Development Self Service.

NOTE: You can override the defaulted Employee ID with another Training Coordinator's ID if required. To change the existing value, simply override with the new Employee ID or click to search

Your Course Session dates are now available for employee enrollment!

Managing Enrollment

Enrolling an Employee into a Non-Session Course

Training Coordinators can enroll employees into a non-session course. A non-session course is a course where there are no session dates attached to the course.

Process Overview:

1. Training Coordinator receives a request to enroll an employee in a Non-Session Course
2. Training Coordinator verifies that the course requirements have been completed
3. Training Coordinator searches for the course and enrolls the employee into the course
4. Course completion captured in Employee Training Summary

Step One: In the Student Enrollment, Enroll in Course Tab, search for the employee using Employee ID or last name

Navigation: **Main Menu > Administer Training > Student Enrollment > Enroll in Course**

The screenshot shows the 'Enroll in Course' search page. The breadcrumb trail at the top reads: Favorites > Main Menu > Administer Training > Student Enrollment > Enroll in Course. Below the breadcrumb is the title 'Enroll in Course' and the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' button. The 'Search Criteria' section contains several fields: 'Empl ID' (with a 'begins with' dropdown), 'Empl Record' (with an '=' dropdown), 'DeptID' (with a 'begins with' dropdown), 'Job Code' (with a 'begins with' dropdown), 'Payroll Status' (with an '=' dropdown), 'Name' (with a 'begins with' dropdown), and 'Last Name' (with a 'begins with' dropdown). There is also a 'Case Sensitive' checkbox. At the bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Two red circles with arrows point to the 'Empl ID' field and the 'Search' button. A red oval on the right contains the text: 'Search Criteria – if you don't know the Employee's 6 digit employee #, use any of the search fields.' Another red oval at the bottom right contains the text: 'If employee ID is unknown, use any of the search criteria fields to find an employee. Last Name is usually the most effective.'

Step Two: Click the “Search” Button. The Employee’s Course Student Enrollment Page will appear.

Step Three: If the Employee's Course Student Enrollment page appears and already has courses identified on the page (existing row of data appears) click the **+** sign to insert a new row to enroll into a course (no session dates).

The screenshot shows the 'Enroll in Course' page for Darlene Power (Person ID: 071154). The page is divided into two main sections: 'Course Information' and 'Student Information'. In the 'Course Information' section, the 'Course Code' is 'CE0005', the 'Course Title' is 'NewEmployeeOrientation-CE', and the 'Session Nbr' is '0160'. The 'Start Date' is '12/10/2019' and the 'End Date' is '12/10/2019'. The 'Student Information' section includes fields for 'Prerequisites Met', 'Attendance' (set to 'Complete'), 'Training Reason', 'Business Unit' (HAMILT), 'Grade', 'Date Needed', 'Status Date' (05/01/2019), 'Waitlist Date' (05/01/2019), 'Dept ID' (320520), 'Letter Code' (WTS), and 'Letter Dt' (05/02/2019). A '+' sign is visible in the top right corner of the 'Course Information' section, indicating the option to add a new row.

Step Four: Enter course code

Step Five: Enter start and end date

Step Six: Enter attendance as "Complete"

1. **Course Code** - 6 digit code, or click to search

NOTE: Course Title - will default based on course Code entered.

2. **Start/End Date** - click on to fill in the course date (mm/dd/yyyy)

3. **Attendance** - select 'Complete'

Step Seven: Select "Save"

Employee is now enrolled in the Course Session!

Step Eight: Click on to return to the Enroll in Course page to enter a course enrollment for another employee > Repeat Steps 1-2.

NOTE: If attendance status is changed to 'Enrolled', the employee will receive an automated email notification to confirm their enrollment.

NOTE: Refer to Appendix D? 'Confirmation of Notification of Enrollment' to view the information in this automated message.

Enrolling Employee(s) into a Course Session

Training Coordinators have the ability to enroll employees into any course session. When a Training Coordinator enrolls an employee, manager approval is assumed, and the system will not generate approval requests.

Process Overview:

- 1) Training Coordinator receives a request to enroll an employee(s) into a course session.
- 2) Training Coordinator searches the system for the course.
- 3) Based on seat availability, the employee(s) are enrolled into a course session.
- 4) Based on the Attendance status, the employee receives an automated email notification, either for Training Enrollment Confirmation or for Training Enrollment Waitlist, the next business day.
- 5) An enrolled employee, 7 days prior to the course session date, will receive an automated Training Enrollment Reminder email notification.

Step One: Upon receiving a request for enrollment, the Training Coordinator must search for a course session

Navigation: Menu > Administer Training > Student Enrollment > Enroll Individually > enter the Course Code > click Search.

Enroll Individually

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Course Code	begins with	CE0005
Course Session Nbr	begins with	
Description	begins with	
Course Start Date	=	
Training Facility	begins with	
Session Language	begins with	

Case Sensitive

Search Clear Basic Search Save Search Criteria

Click on "Search"

Step Two: When the list of Course Sessions appears, click on the Course Session Number or Start Date of the Session that you want to enroll the employee into.

Enroll Individually

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Course Code begins with CE0005

Course Session Nbr begins with

Description begins with

Course Start Date =

Training Facility begins with

Session Language begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-7 of 7 Last

Course Code	Course Session Nbr	Description	Course Start Date	Training Facility	Training Facility Name	Session Language
CE0005	0160	NewEmployeeOrientation-CE	12/10/2019	000004	Standard Life Building	(blank)
CE0005	0159	NewEmployeeOrientation-CE	11/12/2019	000004	Standard Life Building	(blank)
CE0005	0158	NewEmployeeOrientation-CE	10/08/2019	000004	Standard Life Building	(blank)
CE0005	0157	NewEmployeeOrientation-CE	09/17/2019	000004	Standard Life Building	(blank)
CE0005	0156	NewEmployeeOrientation-CE	08/13/2019	000004	Standard Life Building	(blank)
CE0005	0155	NewEmployeeOrientation-CE	07/09/2019	000004	Standard Life Building	(blank)
CE0005	0154	NewEmployeeOrientation-CE	06/11/2019	000004	Standard Life Building	(blank)

Step Three: Once the new page opens for the course session, enter the Employee's ID, select "Enrolled" from the drop-down list, and save.

Enroll Individually

Course CE0005 NewEmployeeOrientation-CE Session Nbr 0159 Active
 Start Date 11/12/2019 Start Time 8:30AM
 Facility StdLife Language

Min Students 10 Max Students 24
Nbr Enrolled 0 Nbr Waiting 0

Prerequisite Checking Transfer-Course Session Setup

Attendance Find | View All First 2 of 3 Last

Empl ID [] []
 Empl Record [0] []
 *Attendance []
 Training Reason []
 Letter Code [] []
 Status Date 06/04/2019 []
 Date Letter Printed []
 Grade []

Department

Business Unit [] []
 Department [] []

Demand from Budget Training

Search Criteria
 Population Catalog Demand ID []

Save Return to Search Previous in List Next in List Notify Refresh

Critical to Review before enrolling

Empl ID – 6 digit employee ID

Attendance – select 'Enrolled' from drop down list.

Status Date is defaulted with today's date. Do not need to change

All other fields – Leave blank. Not used

NOTE: Click Save after each entry

The employee is now enrolled into the course session.

NOTE: If when you pull up the course session enrollment page and there is employee information pre-populated, go to step four and add additional employee.

NOTE: If there is no room in the Course Session (ie: enrollment number for Maximum Students has been reached), employee 'Attendance' status will be 'Session Waitlisted'.

Step Four: Enroll additional employees if required.

Navigation: click **+** and follow step 3 to enroll another employee.

Enroll Individually

Course CE0005 NewEmployeeOrientation-CE Session Nbr 0159 Active
Start Date 11/12/2019 Start Time 8:30AM
Facility StdLife Language
Min Students 10 Max Students 24
Nbr Enrolled 1 Nbr Waiting 0

Prerequisite Checking Transfer-Course Session Setup

Attendance Find | View All First 1 of 3 Last

Empl ID [] Darlene Power
Empl Record [0]
*Attendance [Enrolled]
Training Reason []
Letter Code [CON] Confirmed Status Date [06/04/2019]
 Prerequisites Met Date Letter Printed
Grade []

Department

Business Unit [HAML] City of Hamilton
Department [320520] CityMgr-HR-S&O-ODAdmin

Demand from Budget Training

Search Criteria
 Population Catalog Demand ID []

Save Return to Search Previous in List Next in List Notify Refresh

NOTE: remember to click **Save** after each entry.

Step Five: Save after each employee enrollment entry.

Step Six: If there are additional enrollments for a different course, click “Return to Search” and begin process again.

Managing Training

Managing Course Attendance Status

Training Coordinators may want to view the attendance status of employees associated with a course, including those who are waitlisted. Viewing overall attendance can assist with waitlist management, including selecting appropriate persons to enroll in course due to cancellation, to verify that persons associated with the course meet the criteria established through the course audience, or to determine if there are enough waitlisted employees to create or offer another course session date.

Training Coordinators can view attendance status by using a quick view approach, or by pulling the Course Session Summary to obtain more detailed information including the employee's contact information and department.

Quick View of Attendance Status

To view the waitlist:

Step One: Navigate to the "Review Session Summary" Page

Navigation: **Home > Administer Training > Result Tracking > Review Session Summary**

Step Two: Search Course Code. Enter "Search"

The screenshot shows the 'Enroll Individually' search interface. At the top, there is a breadcrumb trail: 'Favorites > Main Menu > Administer Training > Student Enrollment > Enroll Individually'. Below this, the page title 'Enroll Individually' is displayed, followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A search bar with the placeholder text 'Find an Existing Value' is present. Below the search bar, there is a section titled 'Search Criteria' with a dropdown arrow. The search criteria include: 'Course Code' (beginning with a dropdown and a search icon), 'Course Session Nbr' (beginning with a dropdown), 'Description' (beginning with a dropdown), 'Course Start Date' (with an equals sign dropdown and a calendar icon), 'Training Facility' (beginning with a dropdown and a search icon), and 'Session Language' (beginning with a dropdown and a search icon). There is also a 'Case Sensitive' checkbox. At the bottom, there are buttons for 'Search' (circled in red), 'Clear', 'Basic Search' (with a magnifying glass icon), and 'Save Search Criteria'.

Run the Administrator Student List (Session Summary)

Training Coordinators can run a detailed student list to access detailed information on attendance for the purposes of managing the course or to provide information to the instructor or administrator of the course session. This list includes personal information on attendees, and as such should not be distributed beyond the instructor or administrator of the course.

Process Overview:

- 1) Training Coordinator sets up the run control (one time only) to enable the system to create attendance roster reports.
- 2) Training Coordinator navigates to Roster Report to run the Administrator Student List
- 3) Training Coordinator prints the Administrator Student List.

Step One: Navigate to Roster Reporting

Navigation: **Main Menu > COH Custom > Administer Training – Custom > Custom Reports > Roster Reporting**

Step Two: Click on “Search”

The screenshot shows the 'Roster Reporting' page in a web application. At the top, there is a breadcrumb trail: 'Favorites > Main Menu > COH Custom > Administer Training - Custom > Custom Reports > Roster Reporting'. Below this, the page title is 'Roster Reporting'. A message reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these is a 'Search Criteria' section with a dropdown menu. The 'Search by:' field is set to 'Run Control ID begins with' and has an empty text input box. There is a 'Case Sensitive' checkbox which is unchecked. At the bottom of the search criteria section, there are two buttons: 'Search' and 'Advanced Search'. The 'Search' button is circled in red, and a red arrow points to it from the right. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

If you have run roster reports previously, the table will be pre-populated with the last course session that you ran a roster report for.

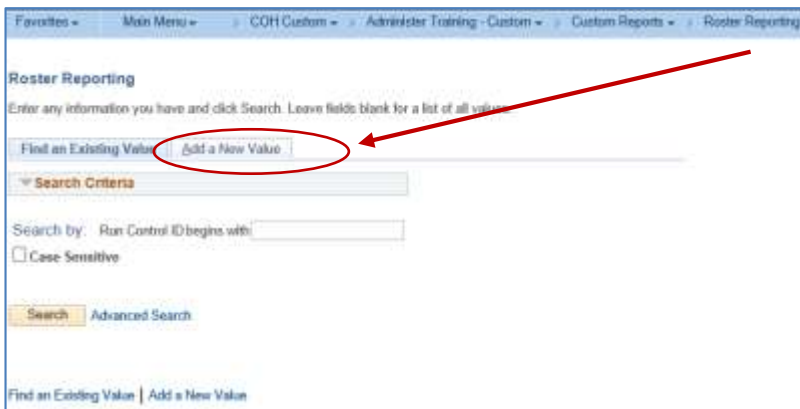
Step Three: Set up the Run Control (if you haven't before)

You will only need to set up a run control the first time that you go into PeopleSoft to pull an attendance roster report. To set up the run control:

1. Navigate to the “Roster Reporting” Table

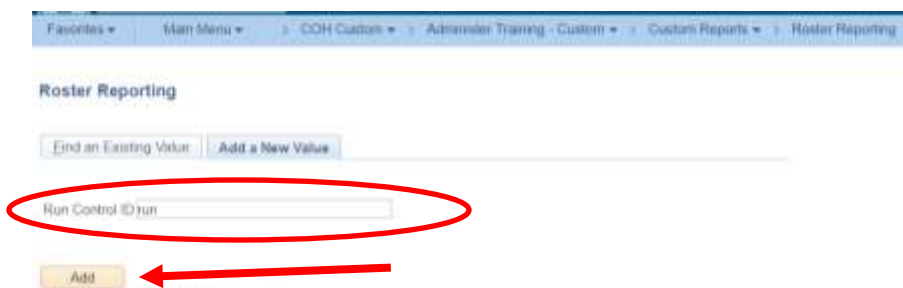
Navigation: Main Menu > COH Custom > Administer Training – Custom > Custom Reports > Roster Reporting

2. Click on the “Add a New Value” tab to create a run control.



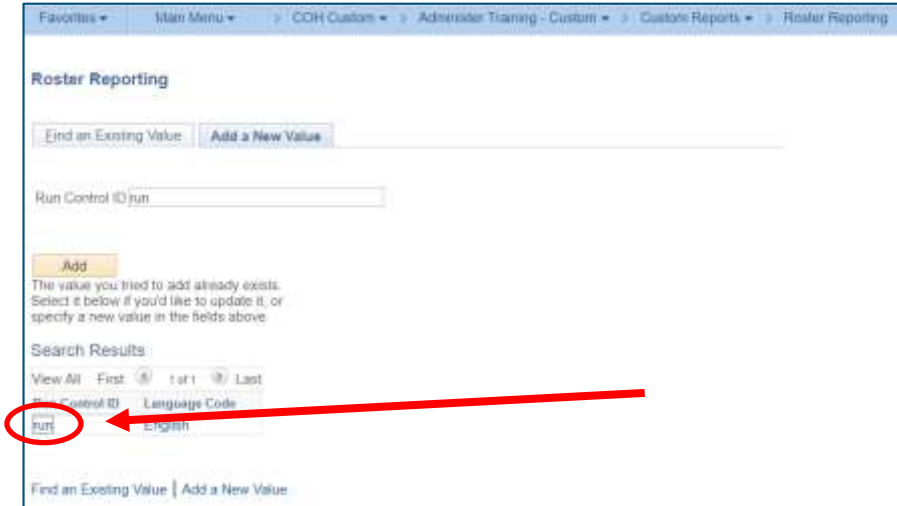
The screenshot shows the 'Roster Reporting' page in PeopleSoft. The breadcrumb trail at the top reads: 'Favorites > Main Menu > COH Custom > Administer Training - Custom > Custom Reports > Roster Reporting'. The page title is 'Roster Reporting'. Below the title, there is a search bar with the text 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search bar contains two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected and circled in red. Below the search bar, there is a 'Search Criteria' section with a dropdown arrow. Underneath, there is a 'Search by:' field with the text 'Run Control ID begins with' and an empty input field. There is also a 'Case Sensitive' checkbox which is unchecked. At the bottom of the search section, there are 'Search' and 'Advanced Search' buttons. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'. A red arrow points from the 'Add a New Value' tab to the right.

3. In the “Run Control ID” field, type “run”. Click “Add”



The screenshot shows the 'Roster Reporting' page in PeopleSoft, similar to the previous one. The breadcrumb trail is the same. The 'Add a New Value' tab is selected. Below the search bar, the 'Search by:' field now contains the text 'Run Control ID run'. The 'Add' button is highlighted with a red circle and a red arrow points to it from the right.

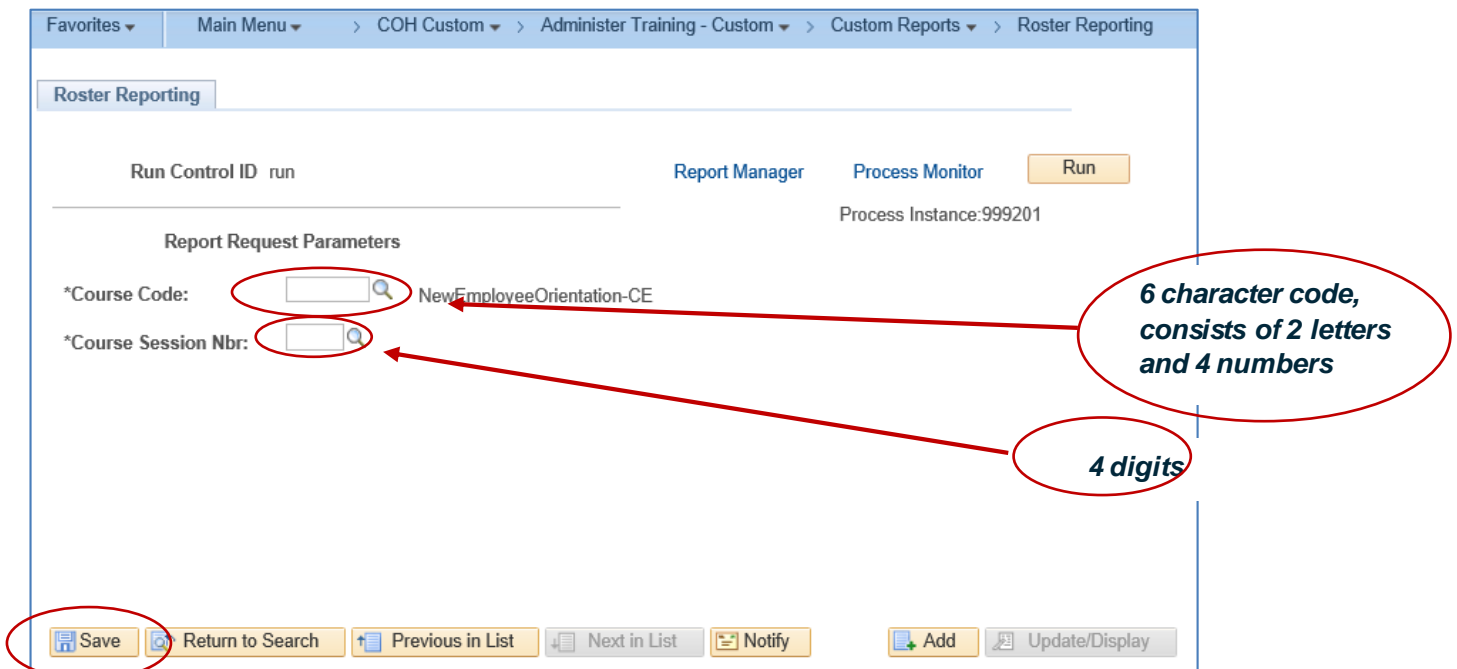
4. When search results for the run control appear, click on “run”



The run control is now set up and the Training Coordinator will not have to complete step one again.

This will bring you to a page where you can enter in the course code and session.

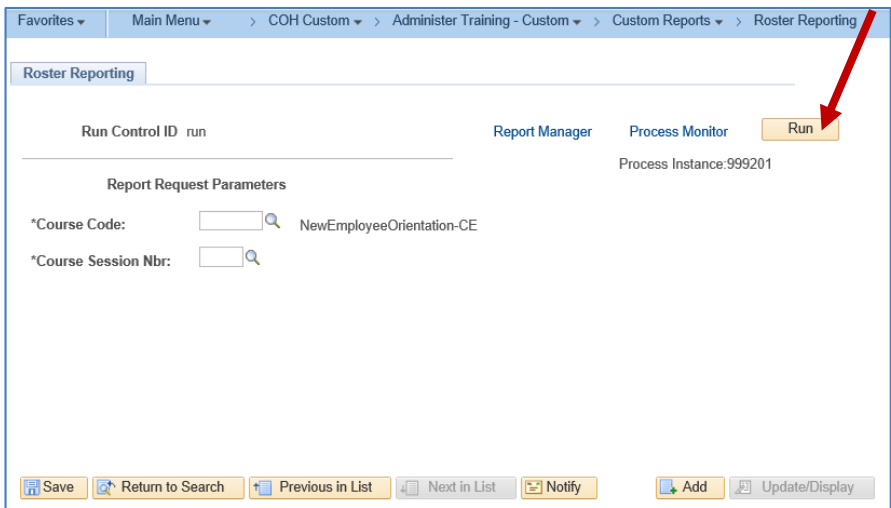
Step Four: Enter the six-digit course code and the four-digit session number for the course you want to run a Course Session Summary report for.



Don't know the course code or the course session? Use the magnifying glass icon to search the course code or the course session.

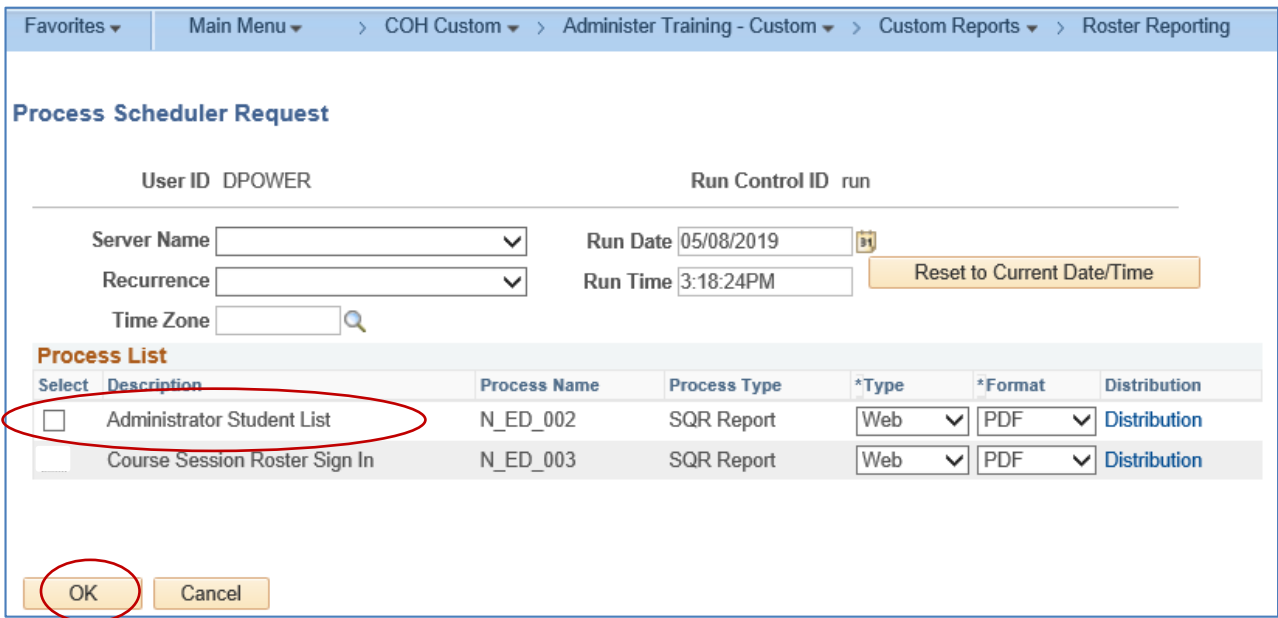
Step Five: Press Save to save the run control feature for future use.

Step Six: Click the “Run” button



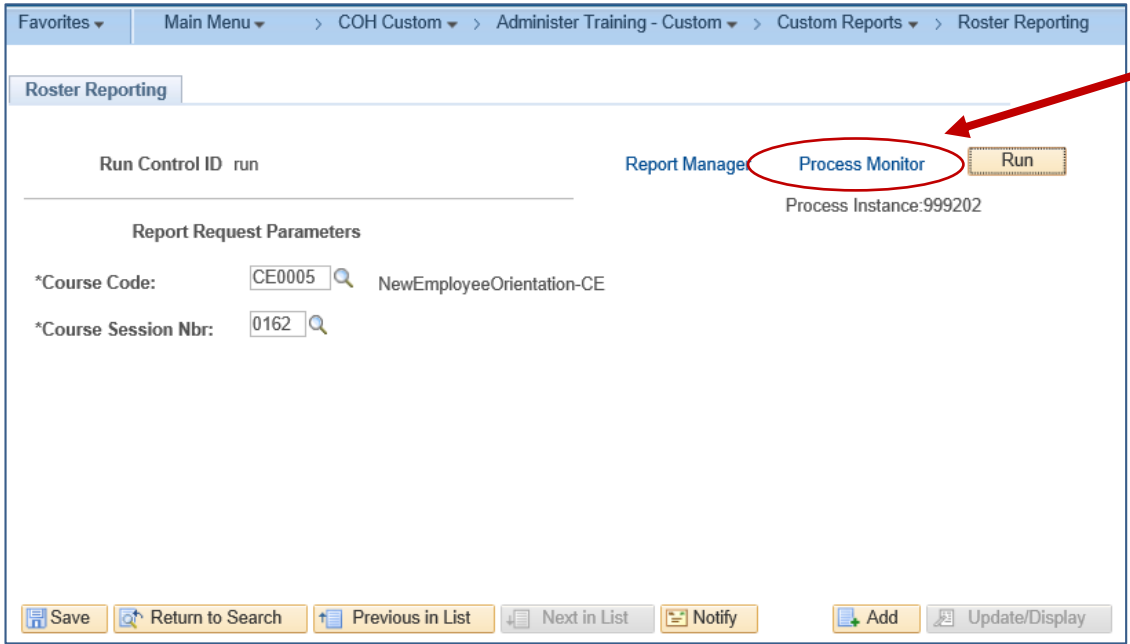
The Process Schedule Request page will appear.

Step Seven: Select the “Administrator Student List” option and Click OK

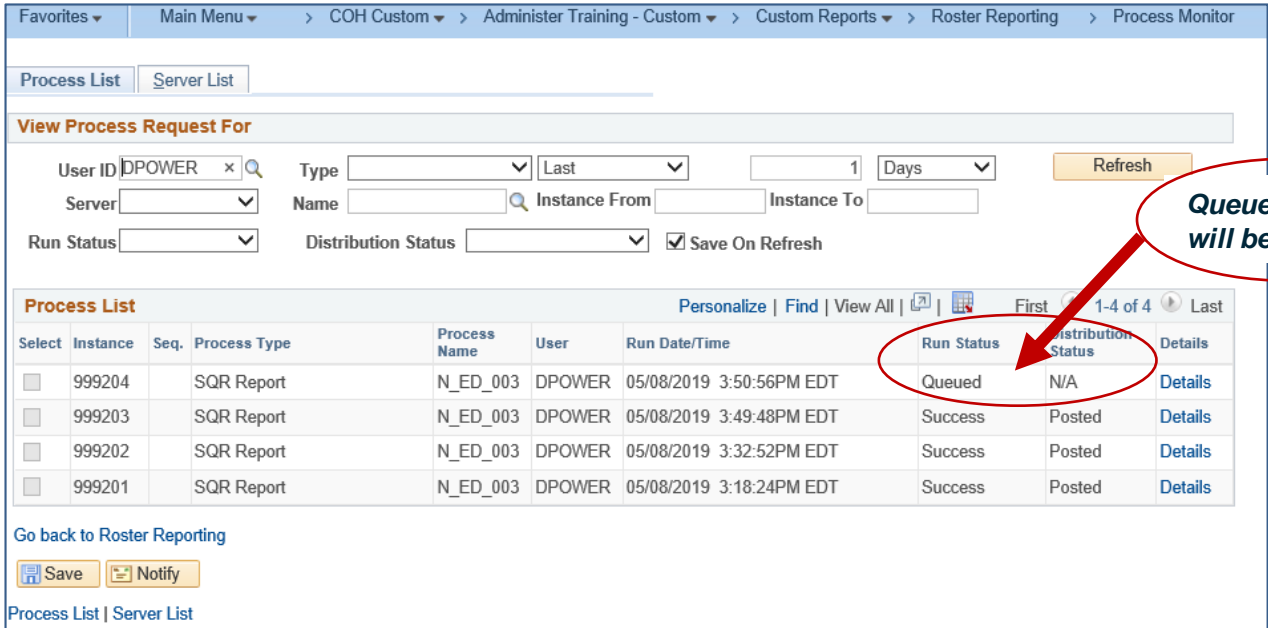


Step Eight: Click “OK”. You will be brought back to the ‘Roster Reporting’ Run Control ID page.

Step Nine: Click "Process Monitor."



Once you click "Process Monitor", the Process List Page will appear. The 'Run Status' and 'Distribution Status' will appear as Queued and N/A.



Step Ten: Refresh the page until the Run Status shows “Success” and the Distribution Status shows “Posted”

View Process Request For

User ID: DPOWER x [Search] Type: [Dropdown] Last [Dropdown] [Input] 1 Days [Dropdown] Refresh

Server: [Dropdown] Name: [Input] Instance From: [Input] Instance To: [Input]

Run Status: [Dropdown] Distribution Status: [Dropdown] Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	999202		SQR Report	N_ED_003	DPOWER	05/08/2019 3:32:52PM EDT	Success	Posted	Details
<input type="checkbox"/>	999201		SQR Report	N_ED_003	DPOWER	05/08/2019 3:18:24PM EDT	Success	Posted	Details

Go back to Roster Reporting

Process List | Server List

Success and Posted will be displayed once the Run process is complete.

Step Eleven: Click on “Details” beside the report that you want to run

View Process Request For

User ID: DPOWER x [Search] Type: [Dropdown] Last [Dropdown] [Input] 1 Days [Dropdown] Refresh

Server: [Dropdown] Name: [Input] Instance From: [Input] Instance To: [Input]

Run Status: [Dropdown] Distribution Status: [Dropdown] Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	999202		SQR Report	N_ED_003	DPOWER	05/08/2019 3:32:52PM EDT	Success	Posted	Details
<input type="checkbox"/>	999201		SQR Report	N_ED_003	DPOWER	05/08/2019 3:18:24PM EDT	Success	Posted	Details

Go back to Roster Reporting

Process List | Server List

The “Process Detail” Page will appear

Step Twelve: Under Actions Heading, click “View Log/Trace.”

Process Detail

Process

Instance 999203 Type SQR Report
 Name N_ED_003 Description Course Session Roster Sign In
 Run Status Success Distribution Status Posted

Run **Update Process**

Run Control ID run Hold Request
 Location Server Queue Request
 Server PSNT Cancel Request
 Recurrence Delete Request
 Re-send Content Restart Request

Date/Time **Actions**

Request Created On 05/08/2019 3:49:56PM EDT Parameters Transfer
 Run Anytime After 05/08/2019 3:49:48PM EDT Message Log
 Began Process At 05/08/2019 3:50:18PM EDT Batch Timings
 Ended Process At 05/08/2019 3:50:32PM EDT **View Log/Trace**

OK Cancel

The “View Log/Trace” Page will appear

Step Thirteen: Under File List, Select the PDF file.

View Log/Trace

Report

Report ID 637337 Process Instance 999203 [Message Log](#)
 Name N_ED_003 Process Type SQR Report
 Run Status Success

Course Session Roster Sign In

Distribution Details

Distribution Node HR9200RD Expiration Date 07/07/2019

File List

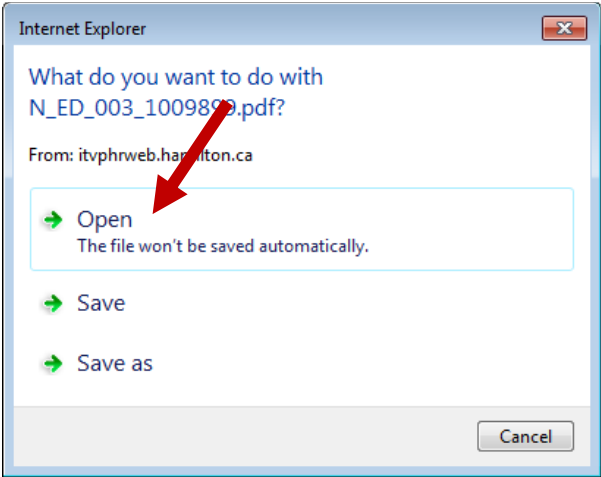
Name	File Size (bytes)	Datetime Created
N_ED_003_999203.PDF	4,598	05/08/2019 3:50:32.080000PM EDT
N_ED_003_999203.out	15,073	05/08/2019 3:50:32.080000PM EDT
SQR_N_ED_003_999203.log	1,647	05/08/2019 3:50:32.080000PM EDT

Distribute To

Distribution ID Type *Distribution ID
 User DPOWER

Return

Step Fourteen: If prompted with the below message, click “open”



The Course Session Summary Report will appear populated with the names of enrolled participants and their department/section name.

Course Session Roster

Course Title: NewEmployeeOrientation-CE
 Course Code: CE0005
 Course Session: 0149

Page No. 3
 Run Date 08/08/2019
 Run Time 15:59:15

ID	Name	Attendance	Contact Information	Rcd	DeptID	Department Job Title	FT/ PT	Union	Status
		Completed		0			FT	C1	Active
		Completed		0			FT	C1	Active
		Completed		0			FT	C1	Active
		Completed		0			FT	CA	Active
		Completed		0			FT	C1	Active
		Completed		0			FT	C1	Active
		Completed		0			FT	C1	Active
		Completed		0			FT	C1	Active
		Completed		0			FT	C1	Active
		LateCancel		0			FT	C1	Active

Change Attendance Status in A Course Session

Training Coordinators may have to change the enrollment status of an employee. This may be the result of an advanced cancellation or late cancellation request made by an employee, or to enroll an employee who is on the waitlist. It is crucial that status is changed as soon as possible, as the change in status may drive notifications, charges, or a requirement to move an employee into the course from the waitlist.

To view a full list of attendance statuses and definitions, see [Appendix D: Attendance Status](#)

Process Overview:

- 1) Training Coordinator is required to change the Attendance status of an 'Enrolled' employee in a course session to an alternate Attendance status.
- 2) Training Coordinator searches the system by the course code and course session number.
- 3) Training Coordinator searches for the employee registration in the course session.
- 4) The Enrolled status of an employee is changed.

Step One: Find the Course associated with the change in attendance status

Navigation: **Main Menu > Administer Training > Student Enrollment > Enroll Individually > enter the Course Code** of which you want to change the employee's Attendance status > **click Search.**

The screenshot shows the 'Enroll Individually' search page. The breadcrumb trail at the top reads: Favorites > Main Menu > Administer Training > Student Enrollment > Enroll Individually. Below the breadcrumb is a search form titled 'Enroll Individually' with the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' button. Under 'Search Criteria', there are several search fields: 'Course Code' (set to 'begins with' and 'CE0005'), 'Course Session Nbr' (set to 'begins with'), 'Description' (set to 'begins with'), 'Course Start Date' (set to '='), 'Training Facility' (set to 'begins with'), and 'Session Language' (set to 'begins with'). A 'Case Sensitive' checkbox is also present. At the bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Two red ovals with arrows point to the 'Course Code' field and the 'Search' button, with labels 'Enter the Course Code' and 'Search' respectively.

Step Two: When the "Enroll Individually" page appears, click on the Course Session number that corresponds to the correct date of the session of which you want to change the employee's attendance status.

If session number is unknown, click on the session date to bring up the session.

Favorites ▾ Main Menu ▾ > Administer Training ▾ > Student Enrollment ▾ > Enroll Individually

All ▾ Search

Enroll Individually

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Course Code begins with ▾ CE0005 🔍

Course Session Nbr begins with ▾

Description begins with ▾

Course Start Date = ▾ 📅

Training Facility begins with ▾ 🔍

Session Language begins with ▾ 🔍

Case Sensitive

Search Clear Basic Search 📄 Save Search Criteria

Search Results

View All First 1-6 of 6 Last

Course Code	Course Session Nbr	Description	Course Start Date	Training Facility	Training Facility Name	Session Language
CE0005	0160	NewEmployeeOrientation-CE	12/10/2019	000004	Standard Life Building	(blank)
CE0005	0159	NewEmployeeOrientation-CE	11/12/2019	000004	Standard Life Building	(blank)
CE0005	0158	NewEmployeeOrientation-CE	10/08/2019	000004	Standard Life Building	(blank)
CE0005	0157	NewEmployeeOrientation-CE	09/17/2019	000004	Standard Life Building	(blank)
CE0005	0155	NewEmployeeOrientation-CE	07/09/2019	000004	Standard Life Building	(blank)
CE0005	0154	NewEmployeeOrientation-CE	06/11/2019	000004	Standard Life Building	(blank)

The course session Enrollment Page will appear.

Step Three: Click Find.

Course CE0005 NewEmployeeOrientation-CE Session Nbr 0160 Active
Start Date 12/10/2019 Start Time 8:30AM
Facility StdLife Language
Min Students 10 Max Students 24
Nbr 012345 1 Nbr Waiting 0

Prerequisite Checking Transfer-Course Session Setup

Attendance Find | View All First 1 of 1 Last

Empl ID Darlene Power
Empl Record 0
*Attendance Enrolled Status Date 06/12/2019
Training Reason
Letter Code CON Confirmed Date Letter Printed
 Prerequisites Met Grade

Department
Business Unit HAMLT City of Hamilton
Department 320520 CityMgr-HR-S&O-ODAdmin

Demand from Budget Training
Search Criteria
 Population Catalog Demand ID

Save Return to Search Previous in List Next in List Notify Refresh

Step Four: When search box appears, type the name of the employee that you want to change the attendance status for.

itvdhrdev.hamilton.ca:7001 says

Enter search string:

OK Cancel

Type last name or full name of the employee, if there are numerous enrollments.

Click OK to search for name.

Step Five: Check to ensure that the name pulled up is correct

Course CE0005 NewEmployeeOrientation-CE Session Nbr 0160 Active
Start Date 12/10/2019 Start Time 8:30AM
Facility StdLife Language
Min Students 10 Max Students 24
Nbr Enrolled 1 Nbr Waiting 0

Attendance Find | View All First 1 of 1 Last

Empl ID 071154 Darlene Power
Empl Record 0
*Attendance Enrolled Status Date 06/12/2019
Training Reason
Letter Code CON Confirmed Date Letter Printed
 Prerequisites Met Grade

Step Six: Under 'Attendance', click the drop-down arrow to select status options. Refer to [Appendix D: Attendance Status](#) for available options.

Course CE0005 NewEmployeeOrientation-CE Session Nbr 0160 Active
Start Date 12/10/2019 Start Time 8:30AM
Facility StdLife Language
Min Students 10 Max Students 24
Nbr Enrolled 1 Nbr Waiting 0

Attendance Find | View All First 1 of 1 Last

Empl ID 071154 Darlene Power
Empl Record 0
*Attendance Enrolled Status Date 06/12/2019
Training Reason
Letter Code CON Confirmed Date Letter Printed
 Prerequisites Met Grade

Department
Business Unit HAMLT City of Hamilton
Department 320520 CityMgr-HR-S&O-ODAdmin

Demand from Budget Training
Search Criteria
 Population Catalog Demand ID



Save Return to Search Previous in List Next in List Notify Refresh

Select an Attendance status option from drop down list

Step Seven: Click Save

To change the Attendance status for additional employees in the same course session...

Navigation: **click Find again > type the name of the employee** you want to change the Attendance status for **> click OK > repeat Step 2.**

NOTE: Remember to click Save before exiting the page > click   to return to the Enroll Individually page where you can search for a different course to change session enrollments.

Running the Attendance Sheet Report

Training Coordinators can print an attendance sheet to allow for participants to sign-in at a session. The attendance sheet report will enable you to update attendance before closing the session.

If the Training Coordinator has not created reports previously, ensure that Run Control has been set up (**refer to Step Three: [Run the Administrator Student List](#)**)

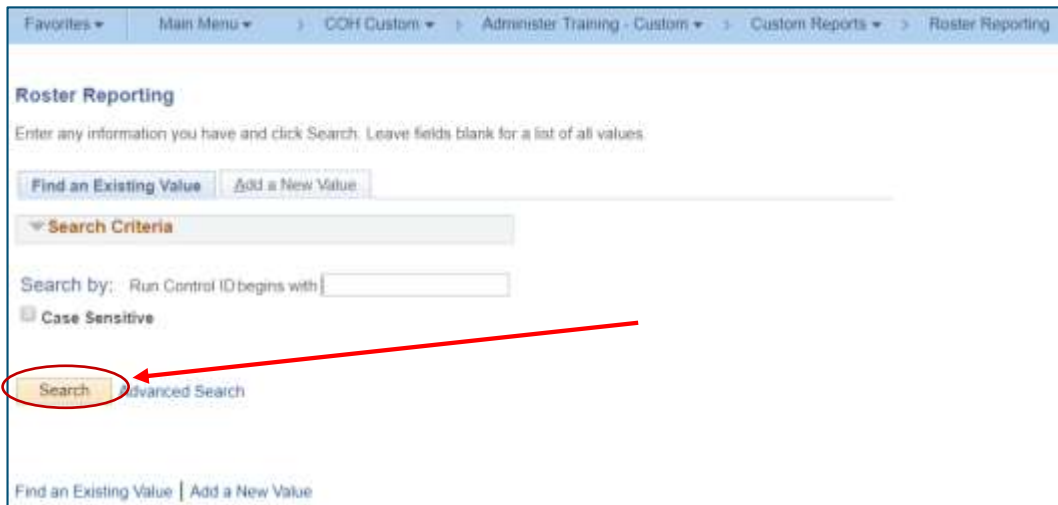
Process Overview:

- 4) Training Coordinator sets up the run control (one time only) to enable the system to create attendance roster reports.
- 5) Training Coordinator navigates to Roster Report to run the Attendance Sign-In Sheet
- 6) Print the Attendance Sign-In sheet.
- 7) Participants need to sign the Attendance Sheet at the training session.
- 8) Attendance Sheet will be used by the Training Coordinator to update employee's Attendance Status in the system (refer to *Closing A Session* section)

Step One: Navigate to Roster Reporting

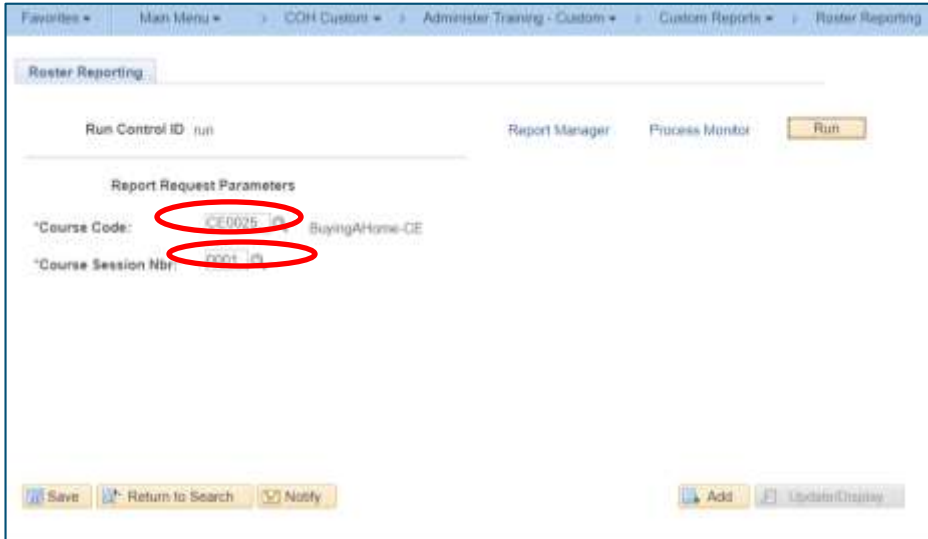
Navigation: Main Menu > COH Custom > Administer Training – Custom > Custom Reports > Roster Reporting

Step Two: Click on “Search”



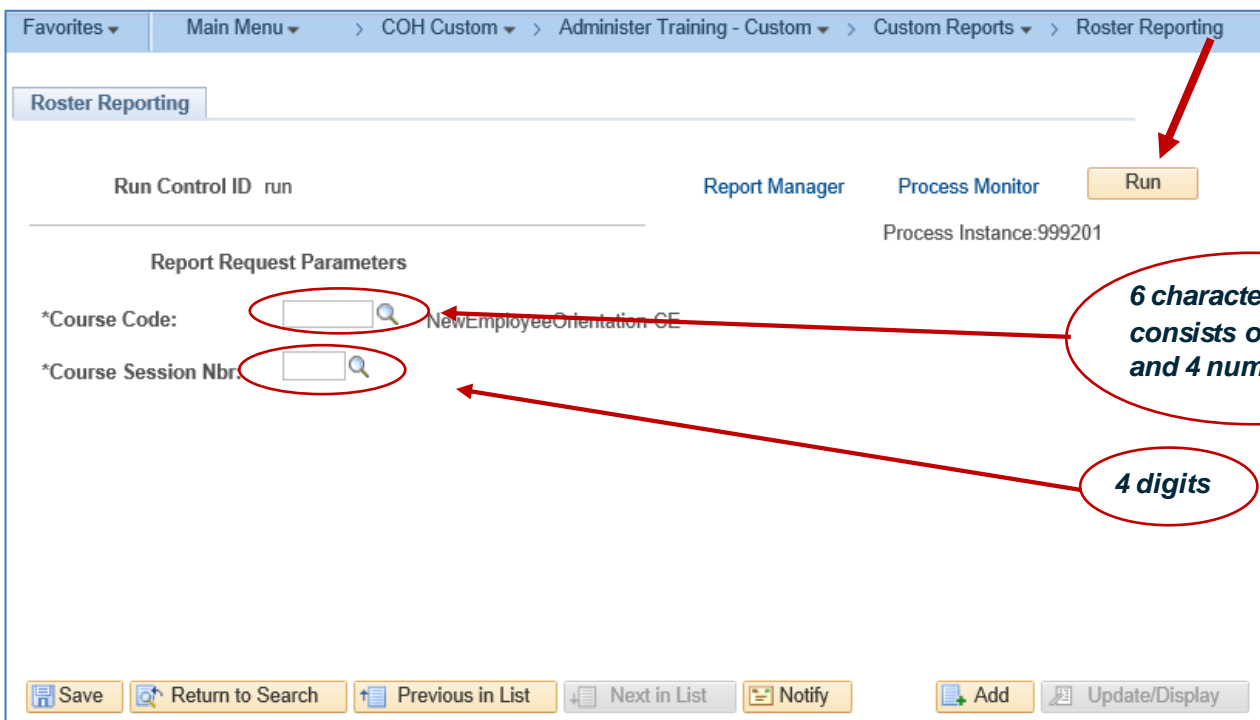
The screenshot shows the 'Roster Reporting' page in a web application. The breadcrumb trail at the top reads: 'Favorites > Main Menu > COH Custom > Administer Training - Custom > Custom Reports > Roster Reporting'. Below the title 'Roster Reporting', there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' dropdown menu is expanded, showing 'Search by: Run Control ID begins with' followed by a text input field. Below this is a 'Case Sensitive' checkbox. At the bottom of the search criteria section, there are two buttons: 'Search' and 'Advanced Search'. The 'Search' button is circled in red, and a red arrow points to it from the right side of the image.

Once Search is selected, a new table will appear:



If you have run roster reports previously, the table will be pre-populated with the last course session that you ran a roster report for.

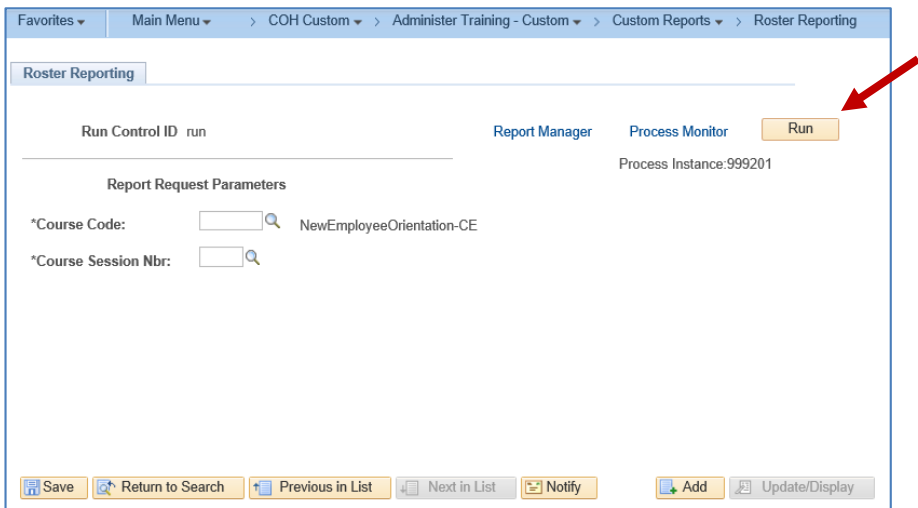
Step Three: Enter the six-digit course code and the four-digit session number for the course you want to run an attendance sheet for.



Don't know the course code or the course session? Use the magnifying glass icon to search the course code or the course session.

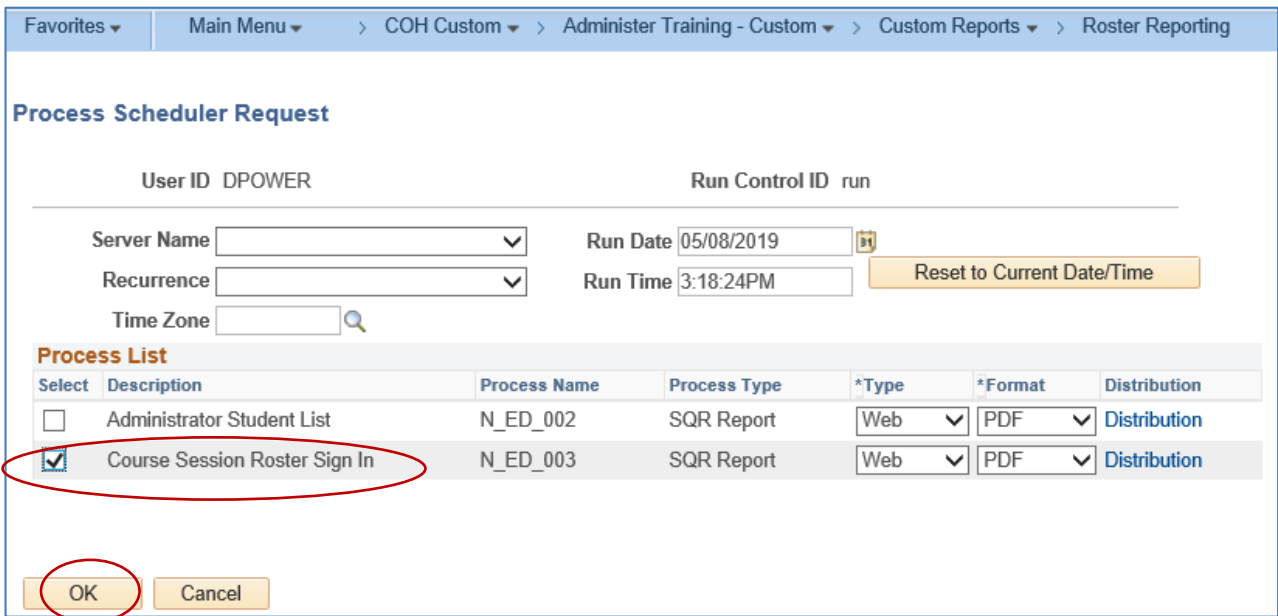
Step Four: Press Save to save the run control feature for future use.

Step Five: Click the “Run” button



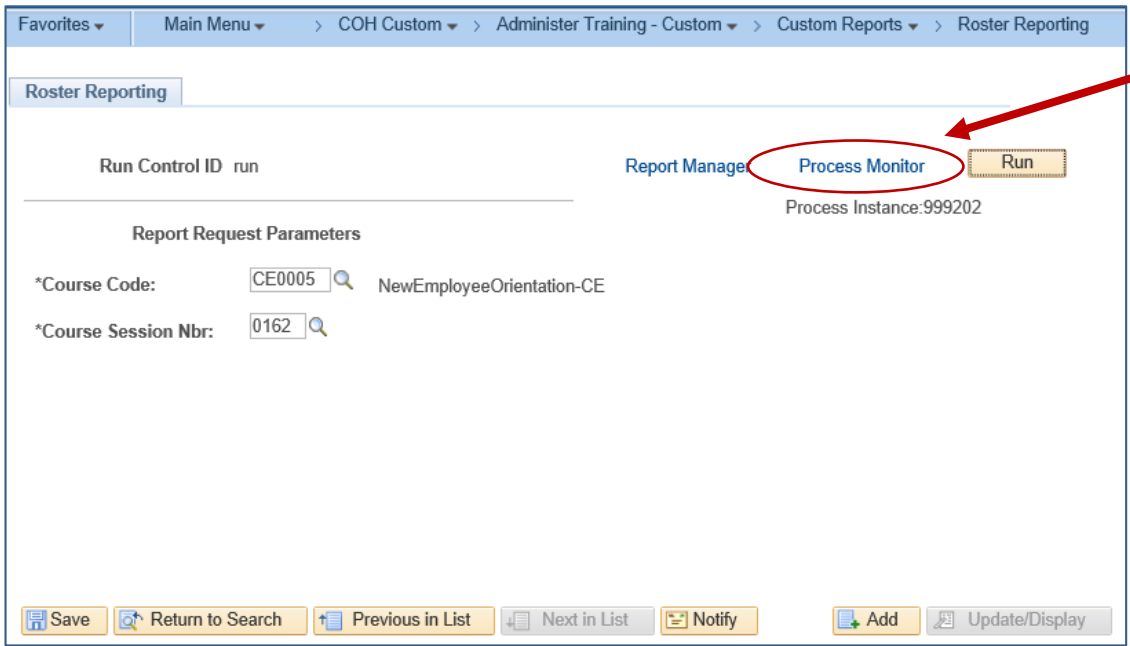
The Process Schedule Request page will appear.

Step Six: Select the “Course Session Roster Sign In” option and Click OK

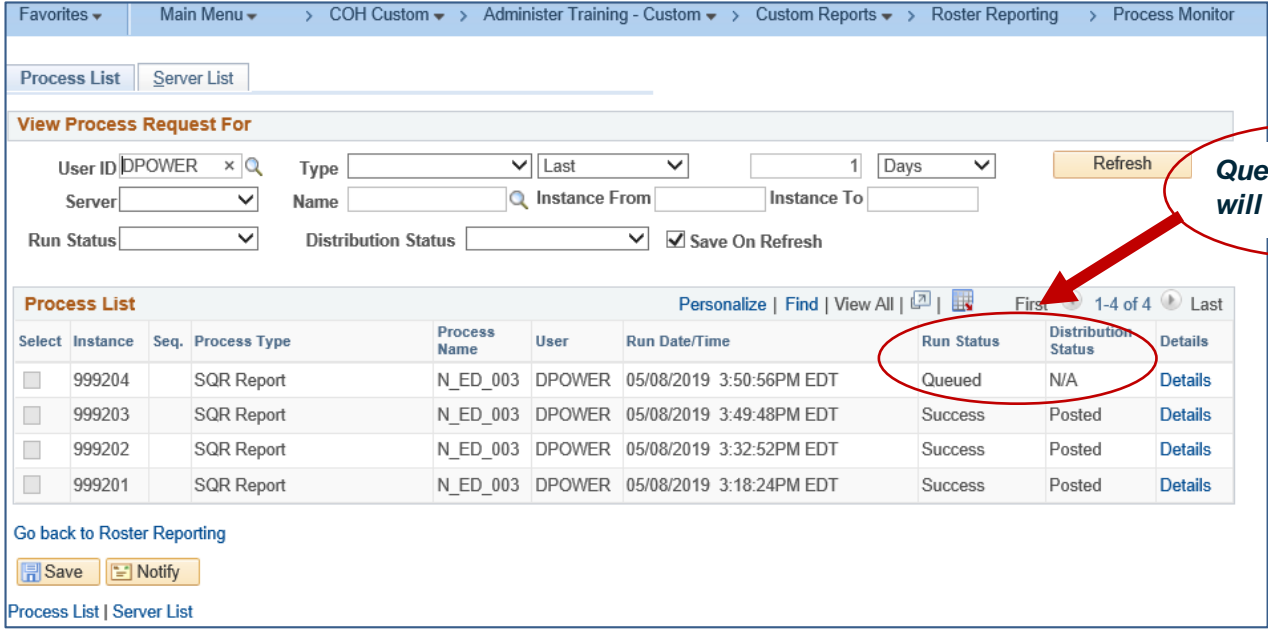


When you click “OK”, you will be brought back to the ‘Roster Reporting’ Run Control ID page.

Step Seven: Click “Process Monitor.”



Once you click “Process Monitor”, the Process List Page will appear. The ‘Run Status’ and ‘Distribution Status’ will appear as Queued and N/A



Step Eight: Refresh the page until the Run Status shows “Success” and the Distribution Status shows “Posted”

Success and Posted will be displayed once the Run process is complete.

View Process Request For

User ID: DPOWER x | Type: [] | Last: [] | 1 Days | Refresh

Server: [] | Name: [] | Instance From: [] | Instance To: []

Run Status: [] | Distribution Status: [] | Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	999202		SQR Report	N_ED_003	DPOWER	05/08/2019 3:32:52PM EDT	Success	Posted	Details
<input type="checkbox"/>	999201		SQR Report	N_ED_003	DPOWER	05/08/2019 3:18:24PM EDT	Success	Posted	Details

Go back to Roster Reporting

Save | Notify

Process List | Server List

Step Nine: Click on “Details” beside the report that you want to run

View Process Request For

User ID: DPOWER x | Type: [] | Last: [] | 1 Days | Refresh

Server: [] | Name: [] | Instance From: [] | Instance To: []

Run Status: [] | Distribution Status: [] | Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	999202		SQR Report	N_ED_003	DPOWER	05/08/2019 3:32:52PM EDT	Success	Posted	Details
<input type="checkbox"/>	999201		SQR Report	N_ED_003	DPOWER	05/08/2019 3:18:24PM EDT	Success	Posted	Details

Go back to Roster Reporting

Save | Notify

Process List | Server List

The “Process Detail” Page will appear

Step Ten: Under Actions Heading, click “View Log/Trace.”

Process Detail

Process

Instance 999203 Type SQR Report
 Name N_ED_003 Description Course Session Roster Sign In
 Run Status Success Distribution Status Posted

Run **Update Process**

Run Control ID run Hold Request
 Location Server Queue Request
 Server PSNT Cancel Request
 Recurrence Delete Request
 Re-send Content Restart Request

Date/Time **Actions**

Request Created On 05/08/2019 3:49:56PM EDT Parameters Transfer
 Run Anytime After 05/08/2019 3:49:48PM EDT Message Log
 Began Process At 05/08/2019 3:50:18PM EDT Batch Timings
 Ended Process At 05/08/2019 3:50:32PM EDT **View Log/Trace**

OK Cancel

The “View Log/Trace” Page will appear

Step Eleven: Under File List, Select the PDF file.

View Log/Trace

Report

Report ID 637337 Process Instance 999203 [Message Log](#)
 Name N_ED_003 Process Type SQR Report
 Run Status Success

Course Session Roster Sign In

Distribution Details

Distribution Node HR92C RD Expiration Date 07/07/2019

File List

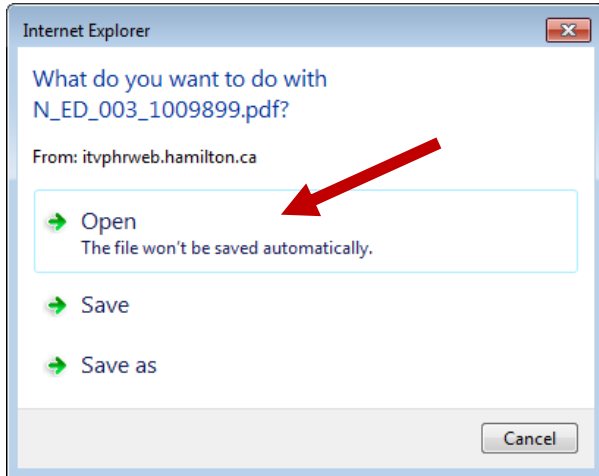
Name	File Size (bytes)	Datetime Created
N_ED_003_999203.PDF	4,598	05/08/2019 3:50:32.080000PM EDT
N_ED_003_999203.out	15,073	05/08/2019 3:50:32.080000PM EDT
SQR_N_ED_003_999203.log	1,647	05/08/2019 3:50:32.080000PM EDT

Distribute To

Distribution ID Type *Distribution ID
 User DPOWER

Return

Step Twelve: If prompted with the below message, click “open”



The Attendance Sheet will appear populated with the names of enrolled participants and their department/section name. You can now print the sheet for sign in.

Course Session Sign-In

Course Title: NewEmployeeOrientation-CE	Page No.: 1
Course Code: CE0005	Run Date: 05/08/2019
Course Session: 0160	Run Time: 15:50:19

Course Session Information

Session	Start Date	End Date	Start Time	End Time	Location	Training Administrator
0160	Dec 10, 2019	Dec 10, 2019	08:30 AM	04:30 PM	Standard Life Building Boardroom B - 9th Floor	Darlene Power 905/546-2424 x5478 pshrtest@hamilton.ca

Name	Department	Signature
1. Wallace, Cassandra	HSC-Rec-DO-D1-DundasMemRecFac	
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		

Closing the Course Session Status

Closing course sessions as soon as possible after the session runs is critically important as closing a session will trigger leader notifications for any late cancellations and no shows; updates employee training summary records; add licences or certificates attached to the course to the employee record (if applicable); and ensures that data in the system is up to date and accurate.

A session is required to be closed off by the Training Coordinator in the following instances:

- ✓ The session took place and is now **Complete**
- ✓ The session did not run and was **Cancelled**

While Training Coordinators will be closing off the session, the signed attendance sheet should be **kept for a period of two years** following completion of the course.

Process Overview:

- 1) Training Coordinator receives the signed attendance sheet.
- 2) Attendance updates entered in the system based on the signed attendance sheet.
- 3) Employees who attended and completed the session, their *Attendance* will remain as '*Enrolled*' in the system.
- 4) Employees who were a '*No Show*' or received an '*Incomplete*', will have their *Attendance* status changed in the system.
- 5) Add any employees that may have shown up that were not enrolled but signed in on the attendance list.
- 6) Once any Attendance updates are done, close the course to Complete
- 7) The completion of the course session will be reflected in the employee's Training Summary the next business day.

NOTE: You only need to update the attendance status for employees who did not attend the session (*No Show*) or did not complete the session (*Incomplete*); otherwise leave all Attendance status as '*Enrolled*' for those who attended and completed the session.

Step One: Navigate to the "Enroll Individually" Page

Navigate: **Main Menu > Administer Training > Student Enrollment > Enroll Individually.**

Step Two: Enter the Course Code and Course Session Number that you wish to close.
Click Search.

Favorites ▾ Main Menu ▾ > Administer Training ▾ > Student Enrollment ▾ > Enroll Individually

Enroll Individually

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Course Code begins with ▾ [] 🔍

Course Session Nbr begins with ▾ [] 🔍

Description begins with ▾ [] 🔍

Course Start Date = ▾ [] 📅

Training Facility begins with ▾ [] 🔍

Session Language begins with ▾ [] 🔍

Case Sensitive

Search **Clear** Basic Search 📄 Save Search Criteria

The “Course Session Enroll Individually” page will appear.

Favorites ▾ Main Menu ▾ > Administer Training ▾ > Student Enrollment ▾ > Enroll Individually

Enroll Individually

Course	CE0005 NewEmployeeOrientation-CE	Session Nbr	0160 Active
Start Date	12/10/2019	Start Time	8:30AM
Facility	StdLife	Language	
Min Students	10	Max Students	24
Nbr Enrolled	1	Nbr Waiting	0

Prerequisite Checking Transfer-Course Session Setup

Attendance Find | View All First 2 of 4 Last

Empl ID [] 🔍

Empl Record [0] 🔍

*Attendance ▾ Status Date [05/22/2019] 📅

Training Reason ▾

Letter Code [] 🔍

Date Letter Printed []

Prerequisites Met

Grade []

Department

Business Unit [] 🔍

Department [] 🔍

Demand from Budget Training

Search Criteria

Population Catalog Demand ID []

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh**

Step Three: Using the signed attendance sheet from the course session, identify the names of employees that must have their attendance changed from enrolled to 'No show' or 'Incomplete'.

NOTE: Only update the 'enrolled' status for employees who did not attend the session (*No Show*) or did not complete the session (*Incomplete*); otherwise leave all Attendance status as 'Enrolled'.

Step Four: On the "Enroll Individually" page, click "Find"

Navigate: Click Find > type in the name of the employee > click OK.

Favorites ▾ Main Menu ▾ > Administer Training ▾ > Student Enrollment ▾ > Enroll Individually

Enroll Individually

Course CE0005 NewEmployeeOrientation-CE Session Nbr 0160 Active
Start Date 12/10/2019 Start Time 8:30AM
Facility StdLife Language
Min Students 10 Max Students 24
Nbr Enrolled 1 Nbr Waiting 0

Prerequisite Checking Transfer-Course Session Setup

Attendance **Find** View All First 2 of 4 Last

Empl ID
Empl Record
*Attendance
Training Reason
Letter Code
 Prerequisites Met
Status Date
Date Letter Printed
Grade

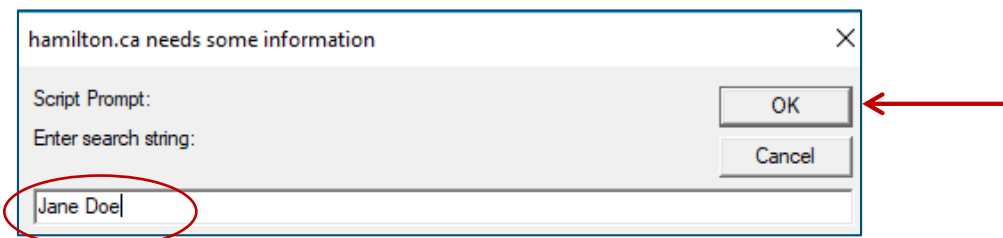
Department

Business Unit
Department

Demand from Budget Training

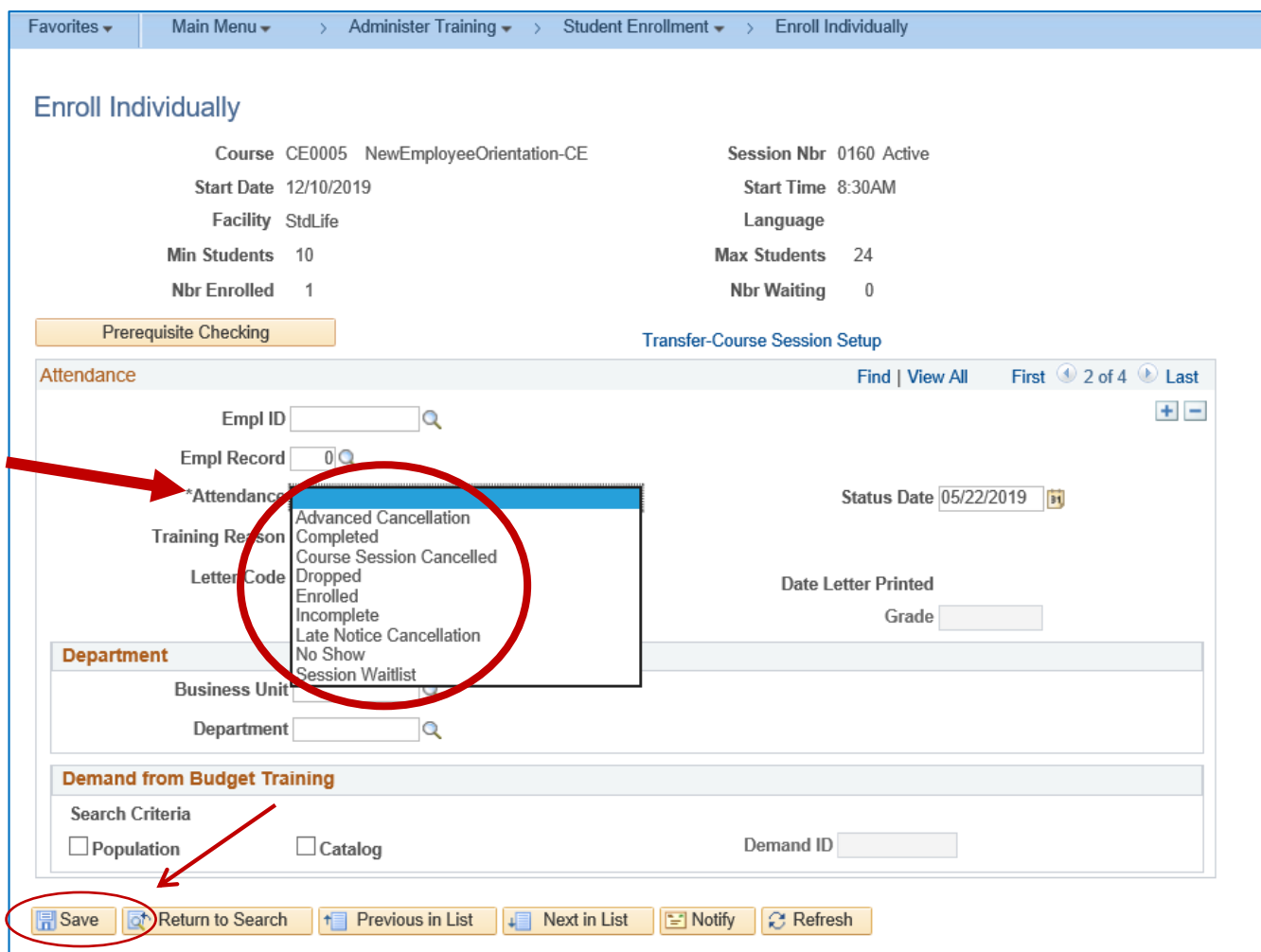
Search Criteria
 Population Catalog Demand ID

Step Five: When search appears, enter the identified employee's name and click "OK"



Step Six: Choose the appropriate option to update the enrolled status for the employee. Click Save

REMINDER! Do not change employee's status from "Enrolled" if they attended and completed the course session. When the course is closed, the 'enrolled' status will automatically change to 'Completed'.



Step Seven: Repeat Steps Four, Five, Six for every employee that requires a status change from 'enrolled' to 'No Show' or 'Incomplete' in the course session.

NOTE: It is very important that employee status is changed before closing the course as the session cannot be accessed in the "Enroll Individually" table once the course session has been closed.

Step Eight: Once employee status has been updated, click "Transfer Course Session Set Up"

Favorites ▾ Main Menu ▾ > Administer Training ▾ > Student Enrollment ▾ > Enroll Individually

Enroll Individually

Course	CE0005 NewEmployeeOrientation-CE	Session Nbr	0160 Active
Start Date	12/10/2019	Start Time	8:30AM
Facility	StdLife	Language	
Min Students	10	Max Students	24
Nbr Enrolled	1	Nbr Waiting	0

Prerequisite Checking

[Transfer-Course Session Setup](#)

Attendance

Find | View All First 2 of 4 Last

Empl ID

Empl Record

*Attendance

Status Date

Training Reason

Letter Code

Date Letter Printed

Prerequisites Met

Grade

Department

Business Unit

Department

Demand from Budget Training

Search Criteria

Population Catalog

Demand ID

The course session profile page will appear.

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

Course: CE0005 NewEmployeeOrientation-CE Course Status: Active

Session Number: 0150 School: School Code:

*Session Status: Active Session Administration

*Start Date: 12/10/2019 End Date: 12/10/2019 Rescheduled

Start Time: 8:30AM End Time: 4:30PM

Duration: 8.0 Duration Unit: Hour

Minimum Nbr of Students: 10 Maximum Nbr of Students: 24

Session Language: Vendor ID:

Save Return to Search Notify Add Update/Display

Step Nine: Change Session Status to Complete

Navigate: click **Session Status** drop down arrow > change from **Active** to **Complete** > click **Save**.

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

Course: CE0005 NewEmployeeOrientation-CE Course Status: Active

Session Number: 0150 School: School Code:

*Session Status: Active Session Administration

*Start Date: 12/10/2019 End Date: 12/10/2019 Rescheduled

Start Time: 8:30AM End Time: 4:30PM

Duration: 8.0 Duration Unit: Hour

Minimum Nbr of Students: 10 Maximum Nbr of Students: 24

Session Language: Vendor ID:

Save Return to Search Notify Add Update/Display

Active
Active
Canceled
Complete

NOTE: all participants **Attendance** status as **Enrolled** will automatically be changed to **Complete** and will be reflected in the employee's MyHR Training Summary.

NOTE: If a Course's 'Session Status' is changed to 'Cancelled', a course session cancellation notification is automatically emailed to employees who have a status of Enrolled, Request, or Waitlisted.

NOTE: If a 'Cancelled' Session Status is chosen, managers of any employees who have a status of 'Request' will receive a notification that the session has been cancelled and will only be able to 'Deny' the request.

Queries and Reports

Running Query Data

To capture data pertaining to courses, sessions, employee attendance, etc, Training Coordinators can run a query.

Process Overview:

- 1) Training Coordinator using the Reporting Tools in PeopleSoft to run a query to obtain training data.
- 2) Data is exported into an excel file to filter and sort based on data needs.
- 3) Data can be saved as an excel file for later retrieval.

Step One: Navigate to Queries

Navigation: **Main Menu > Reporting Tools > Query > Query Viewer**

To view a list of all available training queries, in the **'begins with'** field, type **N_TRN > click Search.**

Favorites > Main Menu > Reporting Tools > Query > Query Viewer

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

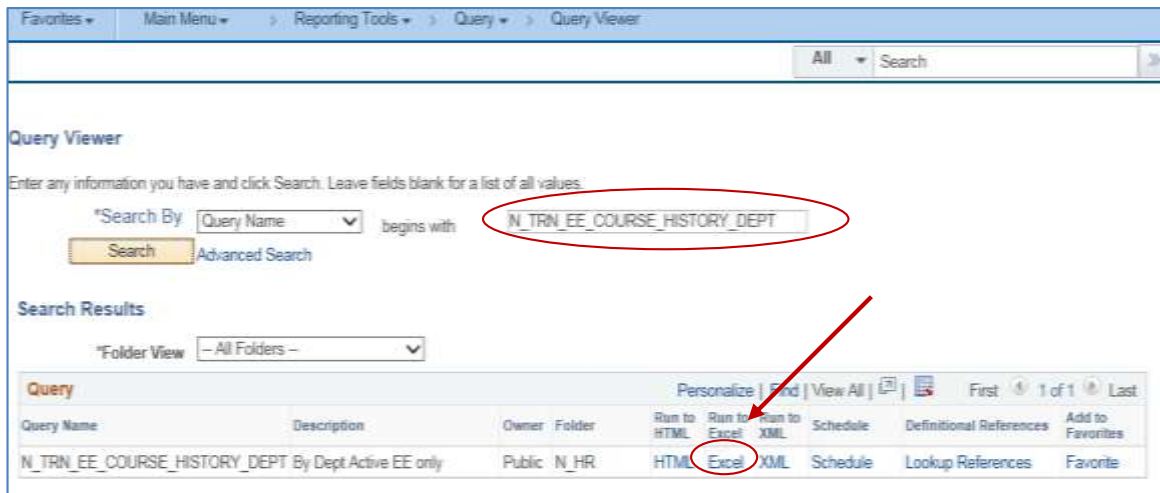
*Search By Query Name begins with N_TRN

Search Advanced Search

Step Two: Select Query Name

In the example below, the query name selected will provide training history per department.

Navigation: To run the chosen query into Excel, **click Excel or the Excel icon.**



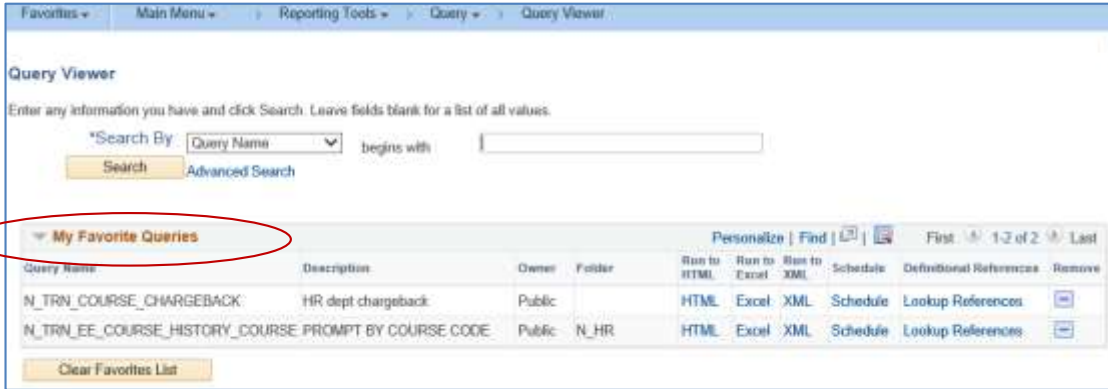
Query Run Options – HTML, Excel, or Favorite

NOTE: Explanation of Query Run Options below.

HTML - runs your query to the screen and the data cannot be manipulated. From this screen, the option to download to Excel is still available.

Excel – runs the query data to an Excel spreadsheet where the data can be manipulated (filtered/sorted). The spreadsheet can be saved for future referencing.

Favorite - allows you to add frequently ran queries to query 'Favorites' for future re-use easily. Click on the Favorites option next to the query you wish to save. The query is now saved and will appear under "My Favorite Queries" the next time you access Query Viewer by navigating to **Main Menu > Reporting Tools > Query > Query Viewer.**



Step Three: Click Find.

Navigation: for this query example fill in % for each field > click **View Results**.
A message to Open or Save the query into Excel will appear > click Open to export the query data into an Excel spreadsheet.



NOTE: different queries will prompt for different field information, eg., a course code, session #, employee ID #, or a between start/finish dates to run data.

NOTE: You can filter and sort your excel spreadsheet to obtain the data to suit your needs.

Queries and Reports

Running Report Data

To capture Course Attendance information on who has 'completed' or who has 'not completed' a specified course.

Process Overview:

- 1) Training Coordinators can use the COH Custom report in PeopleSoft to run a report on training attendance data.
- 2) Data is exported into an excel file to filter and sort based on data needs.
- 3) Data can be saved as an excel file for later retrieval.

Step One: Navigate to Reports

Navigation: **Main Menu > COH Custom > Administer Training – Custom > Custom Reports**

Step Two: Select A Report

Navigation: **Click on the report you want to run.**

There are three reports currently available that can be ran pertaining to Training.



1. **Course Session Posting**
2. **Roster Reporting** - refer to Table of contents 'Attendance Sheet' section
3. **Course Attendance Report** – list of who has Completed / Not Complete the course

For this example, the Course Attendance Report was selected.

Navigation: **click Search**

Course Attendance Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Search by: Run Control ID begins with []

Case Sensitive

Search | Advanced Search

Find an Existing Value | Add a New Value

Step Three: Search for A Report

Navigation: **click Run.**

If the Run option does not appear > **type run in the Search Control field** > then click **Search**. The Run control will now appear > now click Run.

Course Attendance Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Search by: Run Control ID begins with [run]

Case Sensitive

Search | Advanced Search

Search Results

View All | First | 1 of 2 | Last

Run Control ID	Language Code
run	English
	English

NOTE: the first time you run a report you may not have the 'run' option appear. Once you run your first report, the next time the 'run' control should appear on the screen.

Step Four: Select the Course Code to Run a Report

Navigation: enter the 6-digit Course Code for the attendance history you want. Department/Division/Section code will default with % > click Run.

Course Attendance Report

Run Control ID: run

Report Manager Process Monitor **Run**

Report Request Parameters

*Course Code: **co0005**

Department Code: % (Reporting Department - % for ALL codes)

Division Code: %

Section Code: %

Save Return to Search Previous in List Next in List Add Update/Display

*Codes -
Dept/Div/Section -
defaulted to %.
Do Not Change*

Navigation: click Ok.

Process Scheduler Request

User ID: DPOWER Run Control ID: run

Server Name: [dropdown] Run Date: 07/16/2019

Recurrence: [dropdown] Run Time: 1:00:14 PM

Time Zone: [dropdown] Reset to Current Date/Time

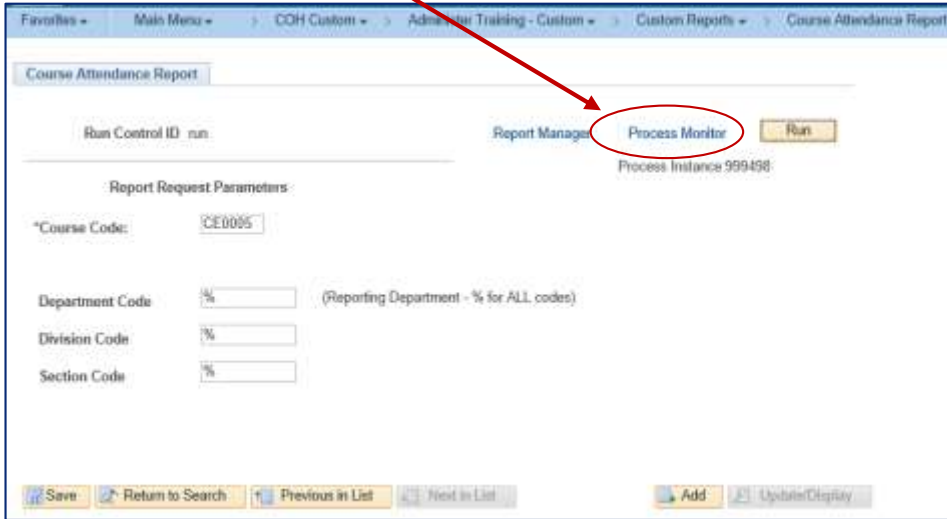
Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Course Taken/Not Taken Rept	N_ED_004	SQR Report	Web	CSV	Distribution

OK Cancel

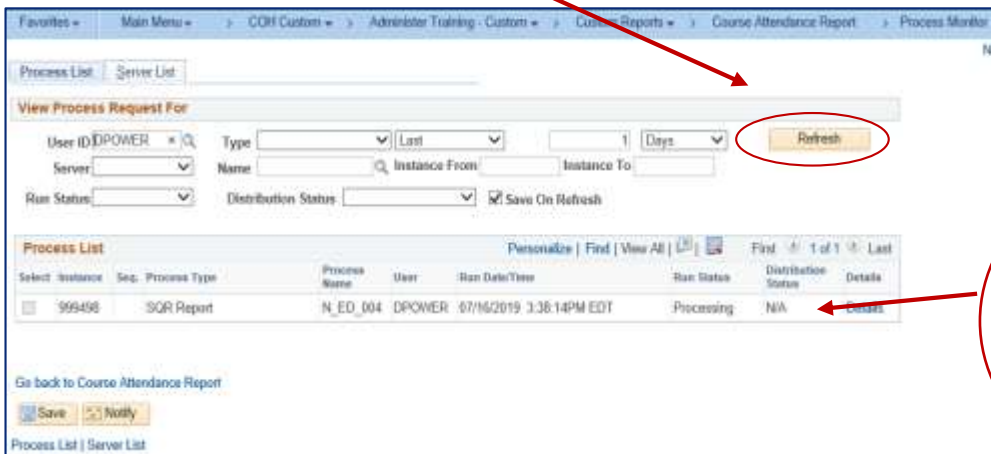
*Process List -
checked off by
default. Do Not
uncheck Courses
Taken/ Not Taken.*

Navigation: **click Process Monitor.**



Step Five: Run A Report

Navigation: **Click Refresh > keep clicking Refresh periodically to speed up the running of report.**



Run Status and Distribution Status - defaulted to Processing and N/A

The refresh process is complete when the Run Status shows Success and the Distribution Status shows Posted.

Step Six:

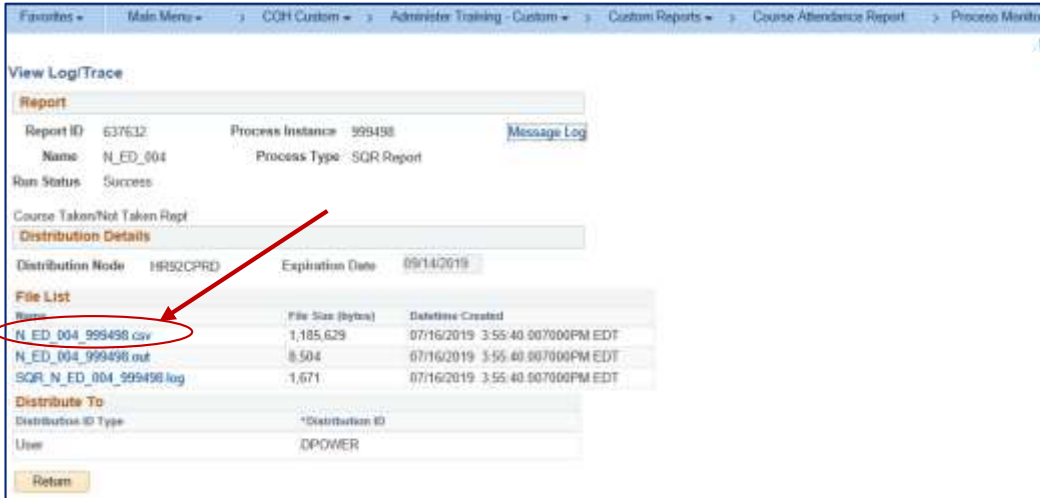
Navigation: **Click Details.**

The screenshot shows the 'Process Monitor' interface. At the top, there is a breadcrumb trail: 'Favorites > Main Menu > COH Custom > Administer Training - Custom > Custom Reports > Course Attendance Report > Process Monitor'. Below this, there are tabs for 'Process List' and 'Server List'. A 'View Process Request For' section contains search filters for 'User ID' (DPOWER), 'Type', 'Last', 'Days', 'Refresh', 'Server', 'Name', 'Instance From', 'Instance To', 'Run Status', and 'Distribution Status'. A 'Save On Refresh' checkbox is also present. Below the filters is a 'Process List' table with columns: 'Select', 'Instance', 'Seq.', 'Process Type', 'Process Name', 'User', 'Run Date/Time', 'Run Status', 'Distribution Status', and 'Details'. The first row of the table has the following values: '999498', 'SQR Report', 'N_ED_004', 'DPOWER', '07/16/2019 3:38:14PM EDT', 'Success', 'Posted', and 'Details'. The 'Success', 'Posted', and 'Details' cells are circled in red, and a red arrow points to the 'Details' cell. Below the table, there are buttons for 'Go back to Course Attendance Report', 'Save', and 'Notify'. At the bottom, there are tabs for 'Process List' and 'Server List'.

Navigation: **click View Log/Trace.**

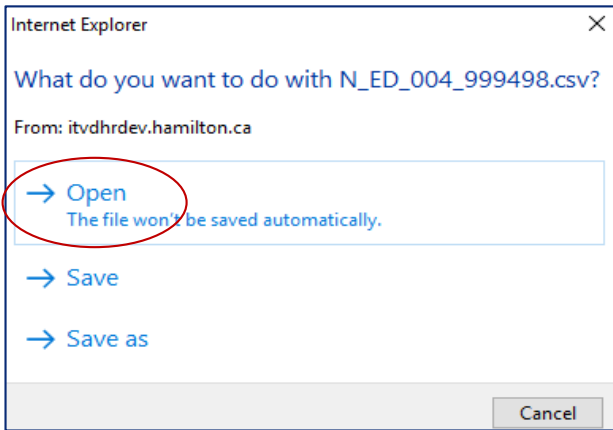
The screenshot shows the 'Process Detail' dialog box. At the top, there is a breadcrumb trail: 'Favorites > Main Menu > COH Custom > Administer Training - Custom > Custom Reports > Course Attendance Report > Process Monitor'. Below this, there are tabs for 'Process Detail' and 'Server List'. The 'Process Detail' section contains the following information: 'Process: Instance: 999498, Type: SQR Report, Name: N_ED_004, Description: Course Taken/Not Taken Rpt, Run Status: Success, Distribution Status: Posted'. Below this, there are two sections: 'Run' and 'Date/Time'. The 'Run' section contains 'Run Control ID: run, Location: Server, Server: PSNT, Recurrence', and 'Update Process' options: 'Hold Request', 'Queue Request', 'Cancel Request', 'Delete Request', 'Re-send Content', and 'Restart Request'. The 'Date/Time' section contains 'Request Created On: 07/16/2019 3:40:32PM EDT, Run Anytime After: 07/16/2019 3:38:14PM EDT, Began Process At: 07/16/2019 3:48:56PM EDT, Ended Process At: 07/16/2019 3:55:40PM EDT', and 'Actions': 'Parameters', 'Transfer', 'Message Log', 'Batch Timing', and 'View Log/Trace'. The 'View Log/Trace' link is circled in red, and a red arrow points to it. At the bottom, there are 'OK' and 'Cancel' buttons.

Navigation: Click the file ending in .csv. This will download the data to Excel.



Step Seven: Open the Report into Excel

Navigation: After choosing the .csv file, you will be prompted with a message box > click **Open**



The report for course CE0005 will appear populated with identified information (columns A – L) of who has completed the course. Those who have not taken the course yet will have no information under columns K and L.

	A	B	C	D	E	F	G	H	I	J	K	L
1	ReportId: N_ED_004											
2	Report Run on: 2019-07-16 at 15:48:56.177											
3												
4	Course Taken/Not Taken Status for Course: CE0005 - NewEmployeeOrientation-CE											
5												
6	Submitted by: DPOWER											
7	Department Req: %											
8	Division Req: %											
9	Section Req: %											
10												
11												
12	Department	Division	Section	DeptId	Employee Number	Empl RCD	Employee Name	Empl Status	Position Title	Manager Level	Course Completed	Completed Date

NOTE: you can filter and sort the spreadsheet based on your requirements.

NOTE: You can Save the spreadsheet as an excel file for future referencing.

Licenses and Certifications

Adding a License and/or a Certification

Training Coordinators can add licenses or certifications to an employee’s Person Profile record. Employees can view their licenses/certifications from their Employee Self-Service Page.

Leaders can also view their employees’ licenses/certifications added into PeopleSoft, and pull reports with details, including expiry, on licenses and certifications for their employees.

NOTE: Training Coordinators must ensure licenses/certifications are valid and current before entering information into PeopleSoft.

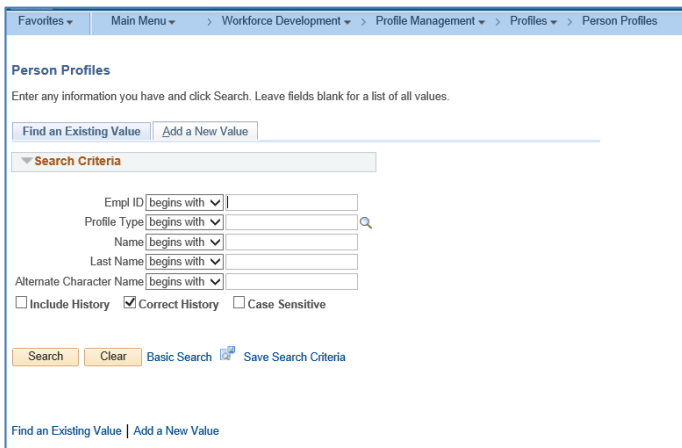
Process Overview:

When an employee receives an issued license/certification, this information will be entered/updated in the employees PeopleSoft record by the Training Coordinator.

- 1) Training Coordinator is informed by employee of issued license/certification.
- 2) Training Coordinator enters the information in PeopleSoft.
- 3) Employee Record is now updated with the current license/certification.
- 4) Employee can view the added entry in the ESS Licenses/Certifications
- 5) Leaders can view licenses and certifications for their employees in MSS

Step One: Navigate to the “Person Profile” Page

Navigation: Main Menu > Workforce Development > Profile Management > Profiles > Person Profile

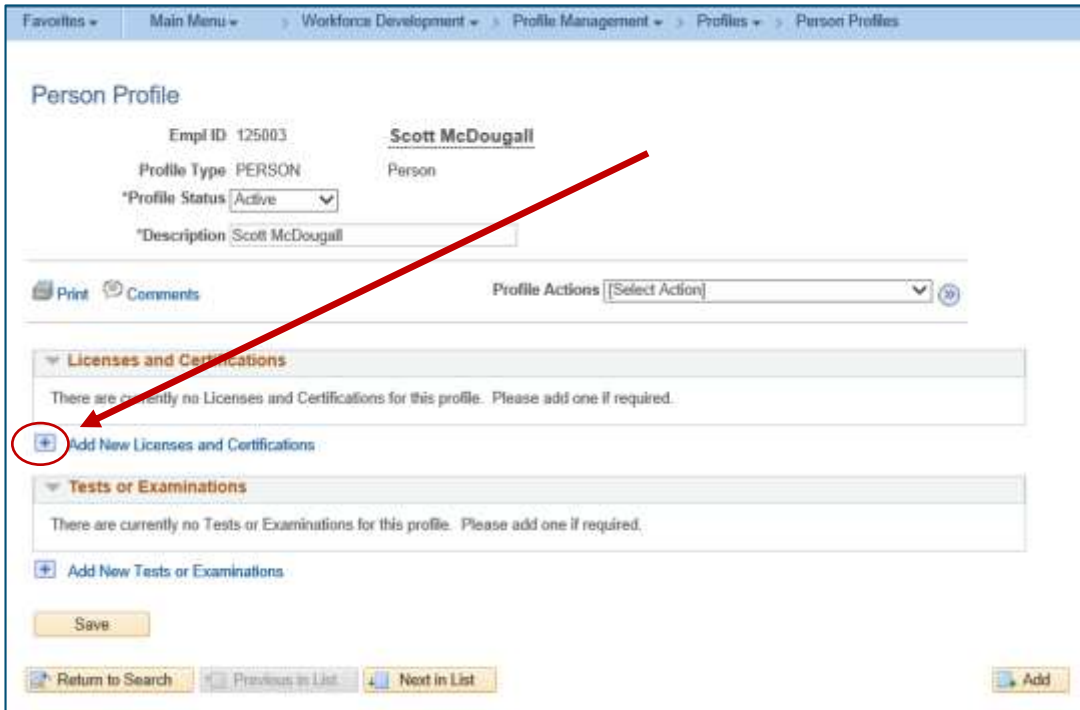


Step Two: Enter the Employee's ID number or their first and last name.

Step Three: Click Search.

The Employee's Person Profile Page will appear.

Step Four: Click “Add New Licenses and Certifications”



NOTE: In the above example, this employee currently has no existing licenses/certifications documented in PeopleSoft

Once “Add New Licenses and Certifications” is clicked, the “Add New Licenses and Certifications” Table appears

Person Profile

Add New Licenses and Certifications

Empl ID 125063 Scott McDougall
 Profile Type PERSON Person

Add item details: Select OK to apply changes and return. Select Cancel to return without making any changes. Select Apply and Add Another to continue adding additional items.

Details Find | View All First 1 of 1 Last

*Issue Date 07/05/2019

*License

*Status Active

Country

State

Renewal Required
 Renewal In Progress
 License Verified

Expiration Date

License/Certification Number

Issued By

OK Cancel Apply and Add Another

Step Five: Click on Magnifying Glass next to License field to bring up “Look up License” Table.

Person Profile

Add New Licenses and Certifications

Empl ID 125063 Scott McDougall
 Profile Type PERSON Person

Add item details: Select OK to apply changes and return. Select Cancel to return without making any changes. Select Apply and Add Another to continue adding additional items.

Details Find | View All First 1 of 1 Last

*Issue Date 07/05/2019

*License

*Status Active

Country

State

Renewal Required
 Renewal In Progress
 License Verified

Expiration Date

License/Certification Number

Issued By

OK Cancel Apply and Add Another

Look Up License Help

Content Type LIC

Content Item ID (begins with)

Content Group Type (begins with)

Content Group (begins with)

Description (begins with)

Look Up Clear Cancel Back Lookup

Search Results

View 100 First 1 of 100 Last

Content Item ID	Content Group Type	Content Group	Description
ZOLSTAE0	(Blank)	(Blank)	2nd Class Stationary Engineer
ZOLSTAE1	(Blank)	(Blank)	2nd Class Stationary Engineer
ZOLSTAE2	(Blank)	(Blank)	4th Class Stationary Engineer
ACCORDT	(Blank)	(Blank)	Air Conditioning Certificate
ACDR3100	(Blank)	(Blank)	Autobly Colln Orngn Rapp 3100
ADH	(Blank)	(Blank)	Accred Cert Industrial Hygiene
ACLS	(Blank)	(Blank)	Advanced Cardiac Life Support
ACORBUS0	(Blank)	(Blank)	Accredited Business Accountant
ACCOLAN0	(Blank)	(Blank)	Advanced Collision Analysis
ADVEMA	(Blank)	(Blank)	Advanced Emergency Med Assist
ADMSTN	(Blank)	(Blank)	Automd Exptl Deltls Met Inst
ARBRAKE	(Blank)	(Blank)	Air Brake Instructor
ARBES100	(Blank)	(Blank)	Arbester Cert
ARBES000	(Blank)	(Blank)	Associate in Risk Management
ARPREMA	(Blank)	(Blank)	Assistant in Fire Marshal
ARINSNS	(Blank)	(Blank)	Asst Insurance Insprl Can Dign
ARSEMG1	(Blank)	(Blank)	Accred Asst Mngmt Specialist
AUTOTECH	(Blank)	(Blank)	Automotive Brake Tools 3100
BRSHCHNG	(Blank)	(Blank)	Brush Chpgr Cert
CANRSKMG	(Blank)	(Blank)	Can Risk Mngmt Designation
CEO	(Blank)	(Blank)	Cert Eco/Finnc Developer
CERDENA	(Blank)	(Blank)	Certified Dental Assistant
CEWTHAS	(Blank)	(Blank)	Cert Member Joint H&S Comm

Step Six: Enter license or certification title using “Description” field. Click “Look Up.”

Step Seven: Select correct license or certification from search results

Note: If the correct license does not appear in the search results, contact the Training Administrator to add a new license or certification to the system.

Step Eight: Complete the remaining required fields under the “Details” section.

Required Fields are indicated with an Asterix (*). Required fields are as follows:

- Issue date (of license)
- License (or Certification)
- Status
-

NOTE: Use the icon next to each field to select an option.

The screenshot shows a web application interface for managing person profiles. The main heading is "Person Profile" and the sub-heading is "Add New Licenses and Certifications". The user's information is displayed as "Emp# 125003 Scott McDougall" and "Profile Type PERSON Person". A message below states: "Add item details: Select OK to apply changes and return. Select Cancel to return without making any changes. Select Apply and Add Another to continue adding additional items." The "Details" section contains the following fields: "Issue Date" (07/05/2019), "License", "Status" (Active), "Country", "State", "Renewal Required" (checkbox), "Renewal In Progress" (checkbox), "License Verified" (checkbox), "Expiration Date", "License/Certification Number" (254 characters remaining), and "Issued By" (254 characters remaining). The "Issue Date", "License", and "Status" fields are circled in red. The "Status" field is a dropdown menu. The "License" field has a magnifying glass icon. The "Expiration Date" field has a calendar icon. The "License/Certification Number" and "Issued By" fields have magnifying glass icons. At the bottom, there are three buttons: "OK", "Cancel", and "Apply and Add Another".

Step Nine: If Multiple licenses or certifications are to be added to an employee, click “Apply and Add Another”

The screenshot shows a web application interface for adding licenses and certifications. At the top, there is a breadcrumb trail: "Favorites > Main Menu > Workplace Development > Profile Management > Profiles > Person Profiles". Below this, the "Person Profile" section displays "Emp# ID: 125803" and "Scott McDougall" for "Profile Type: PERSON" and "Person". A note reads: "Add item details. Select OK to apply changes and return. Select Cancel to return without making any changes. Select Apply and Add Another to continue adding additional items." The "Details" section includes fields for "Issue Date" (07/05/2019), "License" (ACCERT - Air Conditioning Certificate), "Status" (Active), "Country" (CAN - Canada), "Province" (ON - Ontario), "Renewal Required" (checked), "Renewal In Progress" (unchecked), "License Verified" (unchecked), "Expiration Date" (07/05/2020), "License/Certification Number" (ZA09075543-BV), and "Issued By". At the bottom, three buttons are visible: "OK", "Cancel", and "Apply and Add Another". The "Apply and Add Another" button is circled in red, with a red arrow pointing to it from the right.

Step Ten: Once all Licenses and Certifications have been entered for the employee, Click “OK” to save and return to main Person Profile Page.

This screenshot is identical to the one above, showing the same form and data. However, in this step, the "OK" button at the bottom left is circled in red, and a red arrow points to it from the right.

Appendix A: Fields and Descriptions for New Course Request Template

The following table lists the fields, and their descriptions, found on the New Course Set-Up Request Template. When completing the “New Course Request Template” choose the most appropriate answer based on the descriptions.

Field	Description																
Course Title	<p>30 characters maximum. (includes a suffix of Department naming convention, eg. Tree Cutting-PW)</p> <p>Department Naming Conventions for referencing:</p> <table> <thead> <tr> <th>Suffix</th> <th>Department Name</th> </tr> </thead> <tbody> <tr> <td>CE</td> <td>Corporate Employee</td> </tr> <tr> <td>CM</td> <td>Corporate Management</td> </tr> <tr> <td>CO</td> <td>City Managers Office</td> </tr> <tr> <td>CP</td> <td>Corporate Services Department</td> </tr> <tr> <td>HS</td> <td>Healthy and Safe Communities Department</td> </tr> <tr> <td>PE</td> <td>Planning & Economic Development Department</td> </tr> <tr> <td>PW</td> <td>Public Works Department</td> </tr> </tbody> </table>	Suffix	Department Name	CE	Corporate Employee	CM	Corporate Management	CO	City Managers Office	CP	Corporate Services Department	HS	Healthy and Safe Communities Department	PE	Planning & Economic Development Department	PW	Public Works Department
Suffix	Department Name																
CE	Corporate Employee																
CM	Corporate Management																
CO	City Managers Office																
CP	Corporate Services Department																
HS	Healthy and Safe Communities Department																
PE	Planning & Economic Development Department																
PW	Public Works Department																
Internal/ External	<p>Internal (delivered by COH) External (delivered by external party or vendor)</p>																
Course Type	<p>Categorizes the courses. Options include:</p> <ul style="list-style-type: none"> - Core Competency - Corporate Technical Competency - Job Specific Technical Competency - Pilot 																
Primary Delivery Method	<p>Options include:</p> <ul style="list-style-type: none"> - Classroom - On the job training - Web-based - Webinar - Workbook - E-learning/video 																
Min/Max Students	<p>Enter the numbers to be used for determining the minimum and maximum number of students per session.</p>																


Field	Description
	Note: different values can be assigned in each session if required (i.e. in the event one class or facility holds more students than another).
Session Administered	Select YES if the course will be offered on assigned dates/times for enrollment through the creation of sessions. NOTE: the session number is used in order for the course to be included in their training record. Select NO if no sessions will be created, as there are no assigned dates/times, as it is open-ended, eg. On-line training that can be completed on demand.
Duration Time:	The length of course in either hours, days or weeks. The value entered will correspond to the Duration Unit below.
Duration Unit:	Select day, hours, month, week, year. The value corresponds to the Duration Time above.
Course Offering	Indicates how often the course is offered. Options include: Monthly, quarterly, bi-annual, annual, as required.
Prerequisite Course completion required?	Select if there is a specific pre-requisite course required to be completed before allowing enrollment into the course.
License/ Certification	Select if a license/certification will be granted to employee upon completion of course/training. This could be a legislative or job specific license/certification.
Category Code	Competencies (Technical & Core) Job Skills
Subcategory Code	Subcategory to <u>Competencies</u> : <i>Individual Contributor</i> <i>Emerging People Leader</i> <i>People Leader</i> <i>Emerging Executive</i> <i>Executive</i> <i>Approaching Retirement</i>
Subcategory Code cont.	Subcategory to <u>Job Skills</u> :

Field	Description
	<i>Division</i>
Course Title (under Description section)	Full course title. Unlimited characters. This field and those below will show when employee clicks on description link in Employee Self Service.
Target Audience	Who the course is intended for
Cost	Per employee cost to be charged to departments. <i>If no cost</i> then indicate n/a in the field.
Cost Paid By	Which Department is paying for the cost. City Managers Office Corporate Services Healthy & Safe Communities Planning & Economic Development Public Works <i>If no cost</i> , then indicate n/a in the field.
Course Content Information	Details about the course, ie. objective, goals, key messages and other special instructions pertaining to the course
Additional Pertinent Information/ Special Instructions	Any additional information that an employee should know about the course prior to enrolling. This will be viewed in the description on-line. Note: this is different than the 'Special Instructions' field within the Course Session which pertains to the session once they enrol.
Enrollment Approval	YES - the enrollment requires manager approval due to related attendance/cost. Approval is sent through Manager Self Service (MSS). NO - the enrollment does not require manager approval and employee/Training Coordinator can enroll without approval request to manager through Manager Self Service (MSS).

Appendix B: Course Session Profile Tab – Field Descriptions

Field	Description
Session Status	System default to Active. Leave as this option.
Session Administration	System default. Must remained check if you want to allow self-enrollment into the session. If unchecked, you will have to enroll employees.
Start/End Dates	Enter the start & end date of the course session.
Start/End Times	Enter the start & end times of the course session. The times must include four digits separated by a colon and should begin with a 0 if the hours is not a two-digit number and include the AM or PM, eg. 04:30PM NOTE: When entering the start/end date make sure the Duration matches the Duration Unit entered
Duration	Automatically populated by the system using information from the Course Table; however you can change if required.
Duration Unit	Automatically populated by the system using information from the Course Table; however you can change if required.
Min/Max Nbr of Students	Automatically populated by the system using information from the Course Table; however, you can change if required.
Vendor ID	Leave blank. We do not currently use this field.

Appendix C: Location, Instructor Profile Field Descriptions

Field	Description
Start/End Dates	Automatically populated by the system using information from the Course Session Profile tab.
Start/End	Automatically populated by the system using information from the Course Session Profile tab.
Duration	Automatically populated by the system using information from the Course Session Profile tab.
Duration Unit	Automatically populated by the system using information from the Course Session Profile tab.
Facility	Click on the  to search for the Training Facility Location & Room Note: This does not book the facility for you; you must have already booked the facility. The facility information selected is used in the email confirmation to students and Training Posting information
Select Free Training Room	Once you have selected your facility, " <u>Select free Training Room</u> " will become a hyperlink , click the hyperlink to select the room

Appendix D: Attendance Status

Attendance Status	Description - When to use
Advanced Cancellation	employee cancelled within the allotted timeframe of 5 business days prior to the session date. This is a corporate standard
Completed	employee has completed the course
Course Session Cancelled	the required minimum numbers to run the course session was not met
Dropped	employee is being dropped from course, as they don't meet the criteria to take the course, eg. Course is for leaders and a frontline employee enrolled
Enrolled	Employee is enrolled into a course
Incomplete	employee did not complete all the requirements of the course
Late Notice Cancellation	employee did not cancel within the allotted timeframe of 5 business days prior to the session date. This is a corporate standard. A cost may be associated in this instance.
No Show	employee did not show up for the course and did not give notification of their absence
Request	employee Training Request is pending manager approval
Session Waitlist	no seats are available in the course session. The employee is waitlisted

Appendix E: Enrollment Automated Email Notifications

Enrollment Process	Automated Email Notification
'Enrolled' in a Course Session	Confirmation of Enrollment email notification to employee to confirm their enrollment into a course session.
Confirmed Enrollment Reminder	Confirmation of Enrollment email notification to employee 1 week prior to course session start date.
Enrollment 'Request' Approval Pending	Email notification to manager to advise of pending training request approval.
Enrollment 'Request' Approval Pending Reminder	Email notification to manager and training coordinator to remind of pending approval.
Enrollment 'Request' Approved	See 'Enrolled' in Course process above.
Enrollment 'Request' Denied	Email notification to Employee to advise that request was not approved.
Enrollment 'Waitlisted'	Email notification to employee to confirm their 'Waitlisted' status into a course session.
Enrollment "Late Cancellation', 'No Show' or 'Incomplete'	Email notification to advise manager of 'late cancellation', 'no show', or 'incomplete'.
Course Session 'Cancelled'	Email notification to advise employee of Course Session being cancelled and to enroll into another session date

'Enrolled' In Course Session...

Email Notification to Employee to advise that request was not approved by manager.

To: EE

Cc

Subject: Training **Enrollment Confirmation**

We are pleased to confirm your registration in the following course session. Please update your calendar accordingly.

Description: Course Title

Course Code: 6 digits

Session Code: 4 digits

Dates:

Time:

***Special Instructions: [new field]**

Location:

Facility

Information: <Facility Info unavailable>

Course Session

Cost:

Session

Name

Administrator:

email

Phone # and extension

Student:

Name

email

Employee ID #

Enrollment cancellation requires 5 business days notice prior to course/session date; otherwise, your department may incur a chargeback for the cost of the course.

If you have any questions, please contact the Session Administrator noted above.

(This is an automated message system. Please do not respond. If you have received this message in error, please contact the Session Administrator above.)

Confirmed Enrollment '**Reminder**'...

Email Notification to Employee to advise that request was not approved by manager.

To:
Cc:
Subject: Training Enrollment **Reminder**

This is a reminder that you are registered to attend the following course session. Please ensure that any 'Special Instructions', indicated below, along with the date has been noted and entered into your calendar.

Description: Course Title
Course Code: 6 digits
Session: 4 digits
Date:
Time:

***Special Instructions: [new field]**

Location: Standard Life Building
120 King Street West
Hamilton
Boardroom B - 9th Floor
<http://www.mapquest.com/?version=1.0&hk=2-FVJdg33s>

Facility
Information: <Facility Info unavailable>

Course Session
Cost:

Session
Administrator: Name
email
phone # and extension

Student: Name
email
Employee ID#

Enrollment cancellation requires 5 business days notice prior to course/session date, otherwise, your department may incur a chargeback for the cost of the course.

Please contact the Session Administrator noted above, if you have any questions.

(This is an automated message system. Please do not respond. If you have received this message in error, please contact the Session Administrator above.)

Enrollment 'Request' Approval Pending...

Email Notification to Manager to Advise of Pending Training Request Approval

To: MSS

Subject: Approval Required for Learning and Development Request

A request is awaiting your approval.

Transaction Name: Employee Learning and Development Request

Employee Name:

Employee ID:

To approve or deny this request, go to:

[\[link to go directly to MSS approval page of Learning and Development request is inserted here\]](#)

This is an automated message. Please do not respond to this email

Enrollment of 'Request' Approval Pending Reminder...

Email notification to manager and training coordinator to remind of pending approval.

To: MSS

Subject: Reminder of Approval Required for Learning and Development Request

A request to enroll into a course/course session was sent to you 3 days ago and is awaiting your approval.

Transaction Name: Outstanding Approval for Employee Learning and Development Request

Employee Name:

Employee ID:

To approve or deny this request, go to:

[NOTE: [insert link here to go directly to MSS approval page of Learning and Development request](#)]

This is an automated message. Please do not respond to this email.

Enrollment '**Request**' Denied...

Email Notification to Employee to advise that request was not approved by manager.

To: Employee

Subject: **Approval Denied** for Employee Learning and Development Request

Your request to enrol in the below course has been denied. Inquiries about this non-approval should be directed to (insert Manager/Supervisor name)

Description: Course Name

Course Code: 6 digits

Session Code: 4 digits

Dates:

Session Administrator: Name
 Phone number and extension

This is an automated message. Please do not respond to this email.

Enrollment '**Waitlisted**'...

Email notification to employee to confirm their 'Waitlisted' status into a course session.

To: EE

Cc

Subject: Training Enrollment **Waitlist**

You have been added to the Waitlist for the following course session because there are currently no seats available on the date that you selected.

Description: Course Title

Course Code: 6 digits

Session Code: 4 digits

Date:

Time:

Course Session

Cost:

Session

Administrator: Name
email
phone # and extension

Student: Name
Email
Employee ID #

If a seat becomes available in this session, you will be automatically enrolled into the session, and will receive a confirmation email about your enrollment. If you are removed from the waitlist less than 5 days prior to a session date, you will also be contacted by phone to advise of your enrollment and ensure that you are available to attend.

If you have any questions or concerns, please contact the Session Administrator noted above.

(This is an automated message system. Please do not respond. If you have any concerns about this message or if you have received this message in error, please contact the Session Administrator above.)

Enrollment '**Late Cancellation**', '**No Show**' or '**Incomplete**'...

Email notification to advise manager of Late Cancellation, No Show, or Incomplete. The Department may incur a cost associated with these three notices.

To: MSS

Subject: **Change to 'Enrolled' Attendance Status** to <Insert Status ie: Late Cancellation> for an Approved Learning and Development Request

Transaction Name: 'Enrolled' Attendance Status Change to <Insert Status ie: Late Cancellation> for an Approved Learning and Development Request

Employee Name:

Employee ID:

Attendance Status:

Cost of Course:

Due to the change of 'Attendance' status, there will be a chargeback to the employees associated Dept ID if there is a cost associated with the course.

This is an automated message. Please do not respond to this email

Course Session Cancelled...

Email notification to advise employee of Course Session being cancelled and to enroll into another session date

To:
Cc:
Subject: Training **Enrollment Course Cancellation**

Due to extenuating circumstances, the below course session that you registered to attend has been CANCELLED. We apologize for any inconvenience this may cause.

Please visit [MyHR](#) > Learning and Development > Request Training Enrollment, to view and register for other available sessions.

Description: Name of course
Course Code: 6 digits
Session: 4 digits

Dates:

Time:

Course Session
Cost:

Session
Administrator: Name
 Email
 Phone # and extension

Student: Name
 Email
 Employee ID #

If you have any questions or concerns, please contact the Session Administrator noted above.

(This is an automated message system. Please do not respond. If you have received this message in error, please contact the Session Administrator above.)