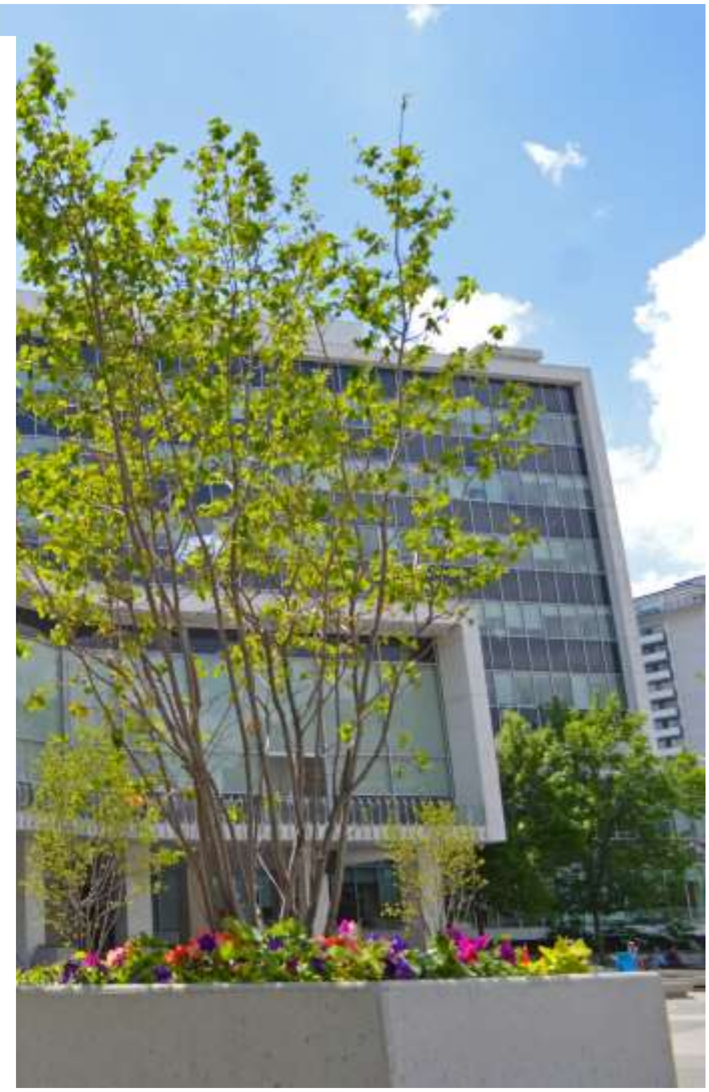
PeopleSoft Training Administration



2019

(updated Sept. 2020)

Training Coordinator User Guide

For Questions Contact:
learning@hamilton.ca

Hamilton

Contents

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:

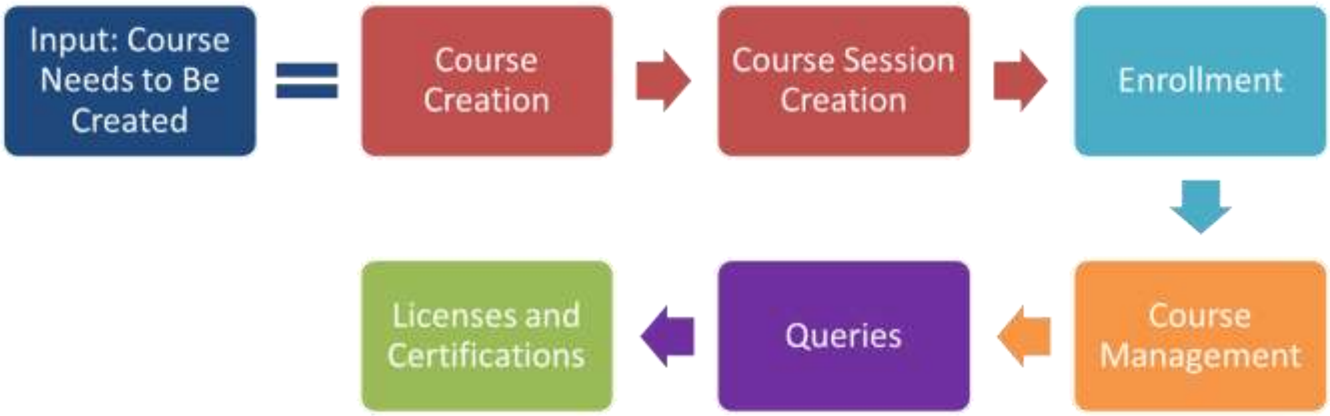
- Submit course request for new courses
- Creating and manage course sessions
- Enroll students
- Add licenses or certifications to student
- Manage waitlists
- Update training records
- Run reports and queries

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	

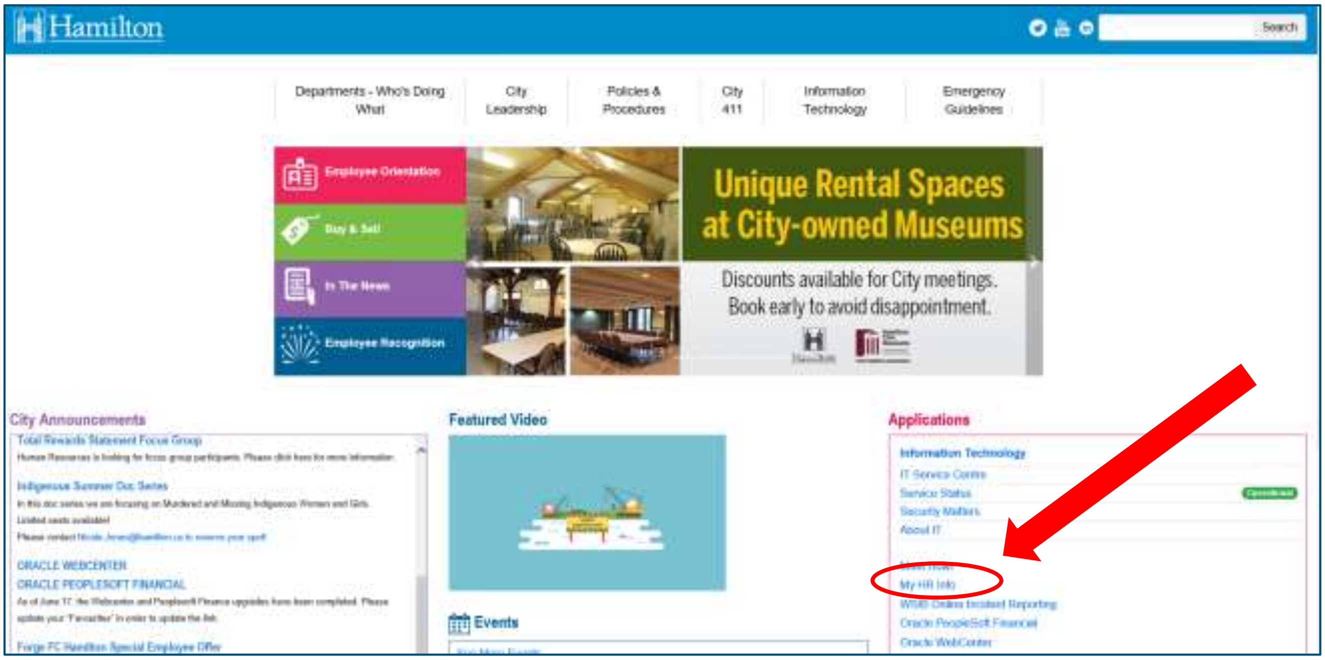
If in doubt of what courses, licenses or certifications to include in PeopleSoft, contact the Training Administrator at x5478 or learning@hamilton.ca

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.

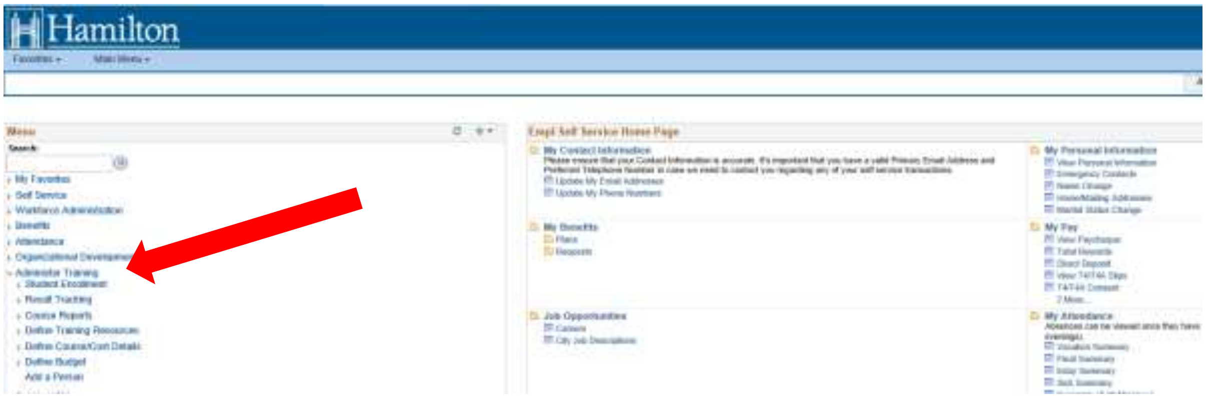
- If a Training Coordinator does not remember their password, use the “Forgot Password” option to obtain a new password.

Step Four: Click the Sign In button

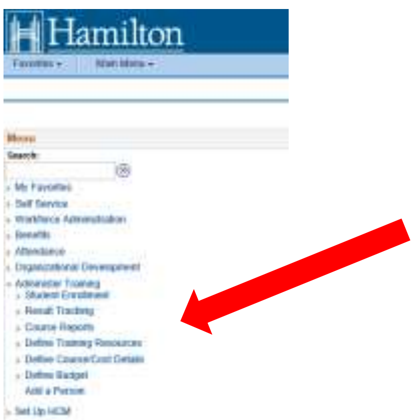
You are now signed in to PeopleSoft as a Core User!

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:

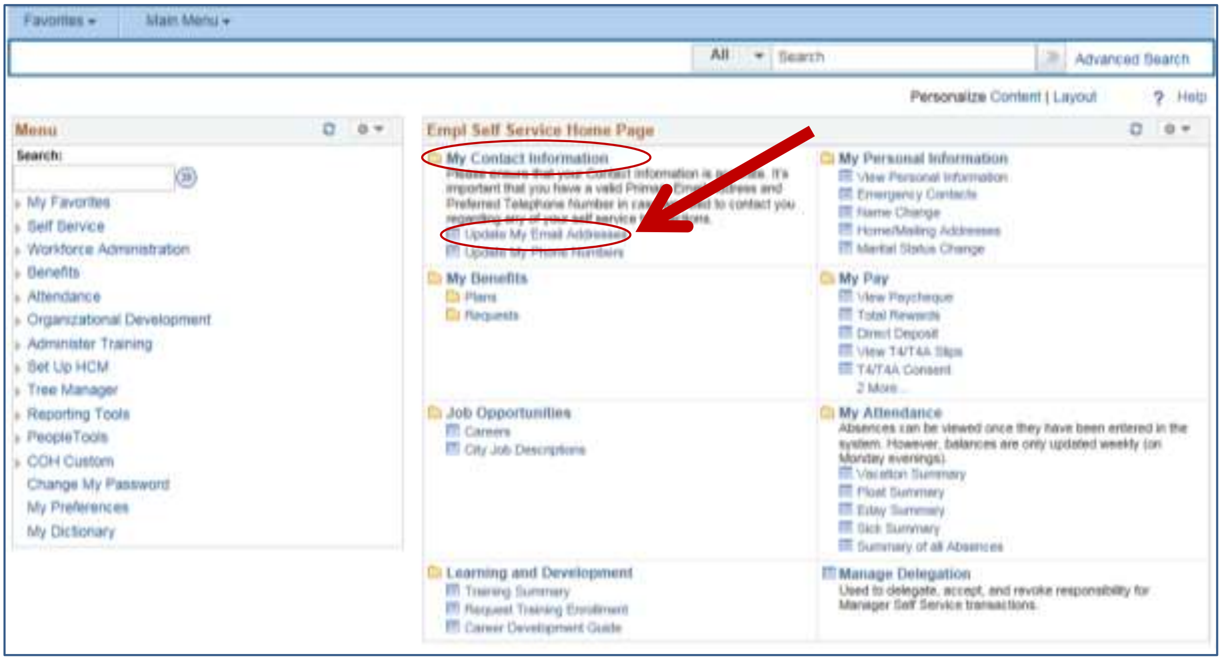
1) Training Coordinator navigates to Self Service Page.
2) In the ‘My Contact Information’ review email and phone number information.
3) Training Coordinators MUST ensure their business email address *is set to Primary* and business phone number *is set to Preferred*.

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.**



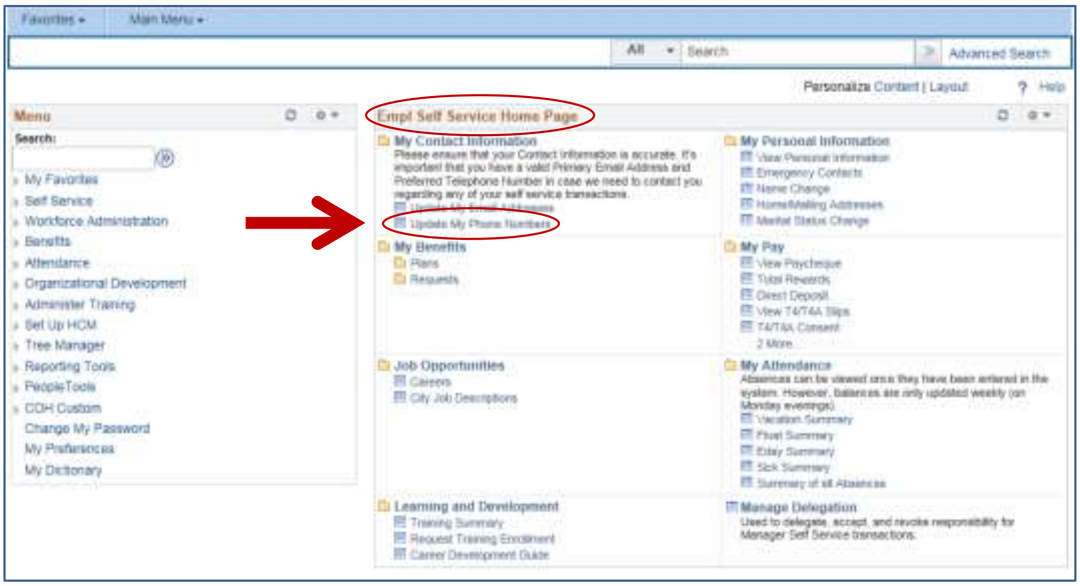
Step Two: Ensure your business email address is the “Primary Email Account” and save.

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:

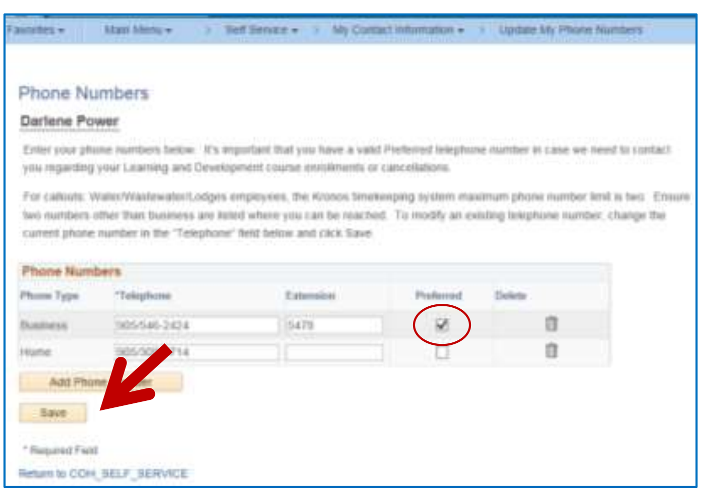
Step One: Navigate to "Update My Phone Numbers" from Employee Self Service Home Page

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



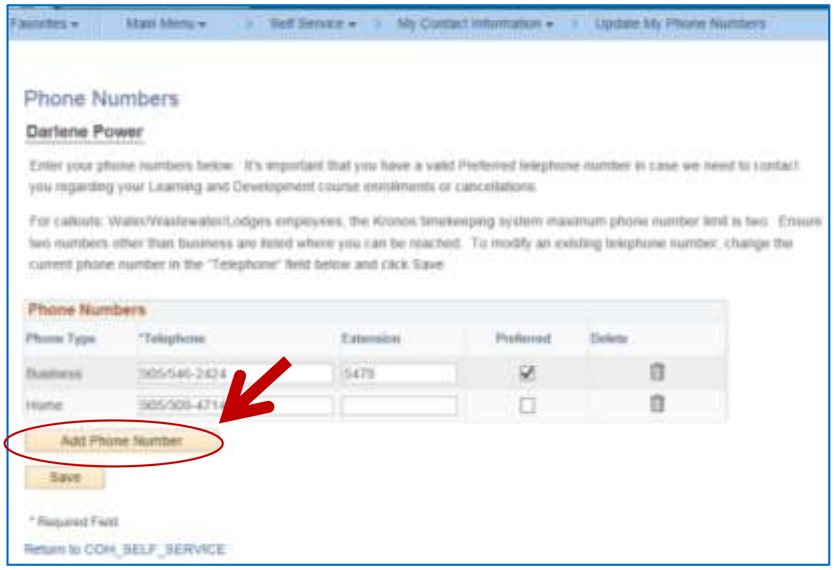
Step Two: Review Phone Numbers and select your business phone number as the "Preferred" and save.

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.

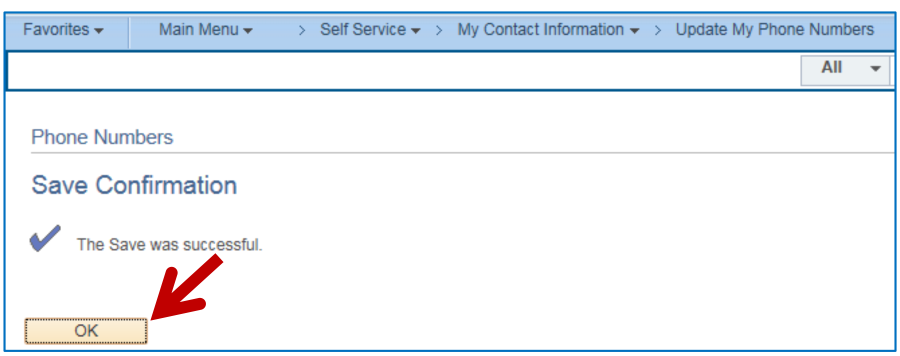


Step Three: If your Business phone number does not appear as an option, add your business number

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



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



Training Administration

Courses and Sessions

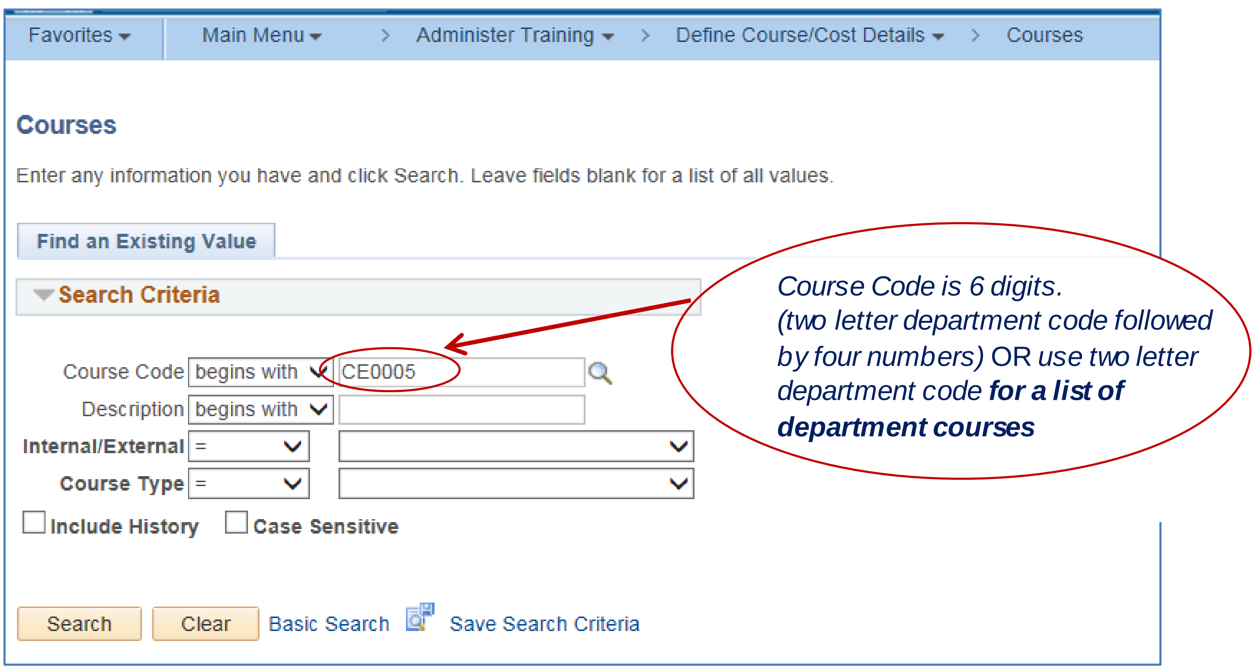
Viewing Courses in PeopleSoft

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.

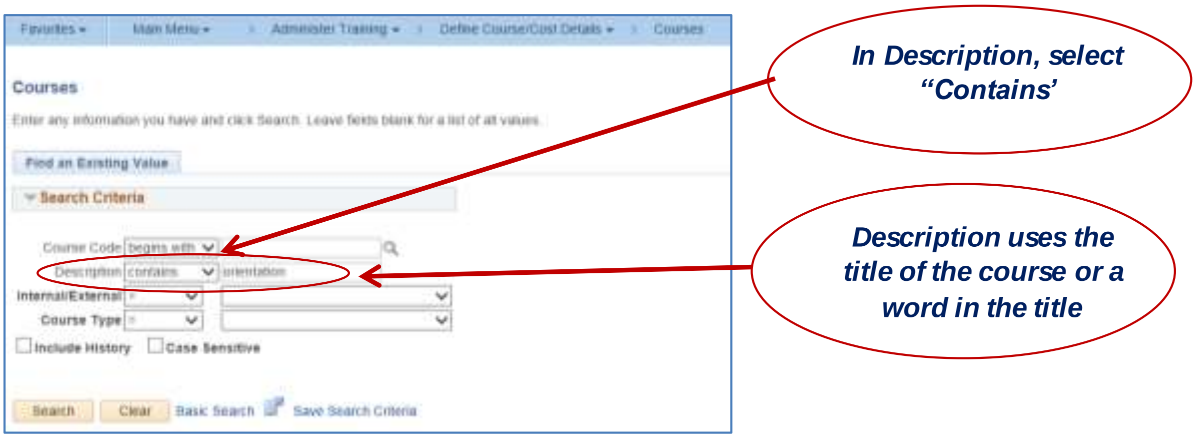


NOTE: for a list of Department Naming Conventions, see below.

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

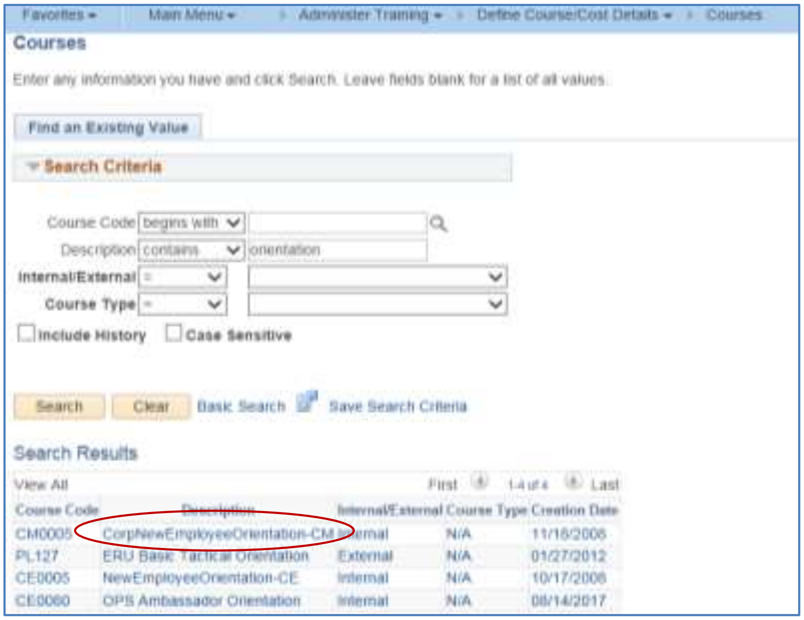
Step Three: If the course code is not known, a search can be conducted using the title of the course or a word contained in the course title.

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

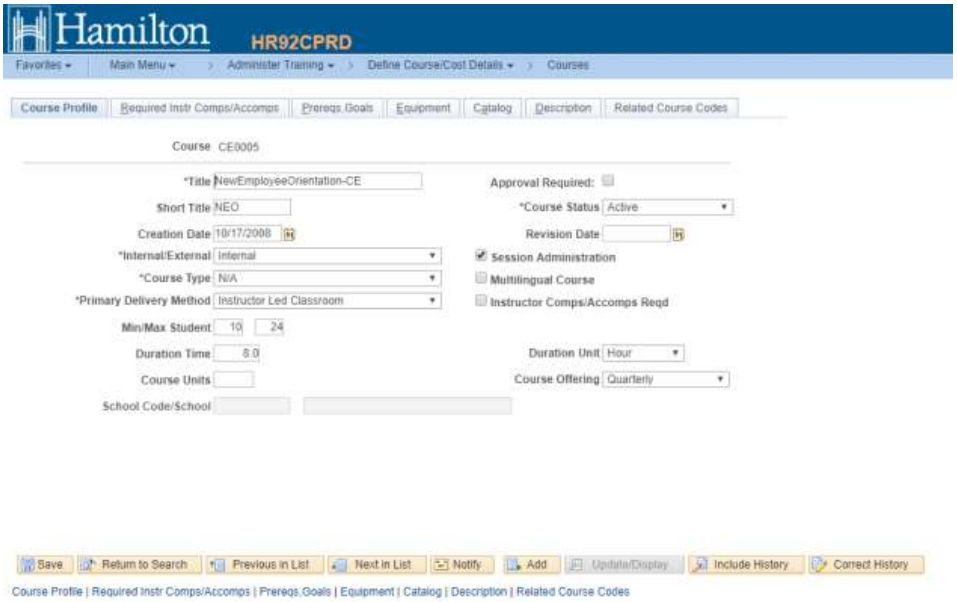


Step Four: Click "Search." A list of courses with the associated word in the title will appear.

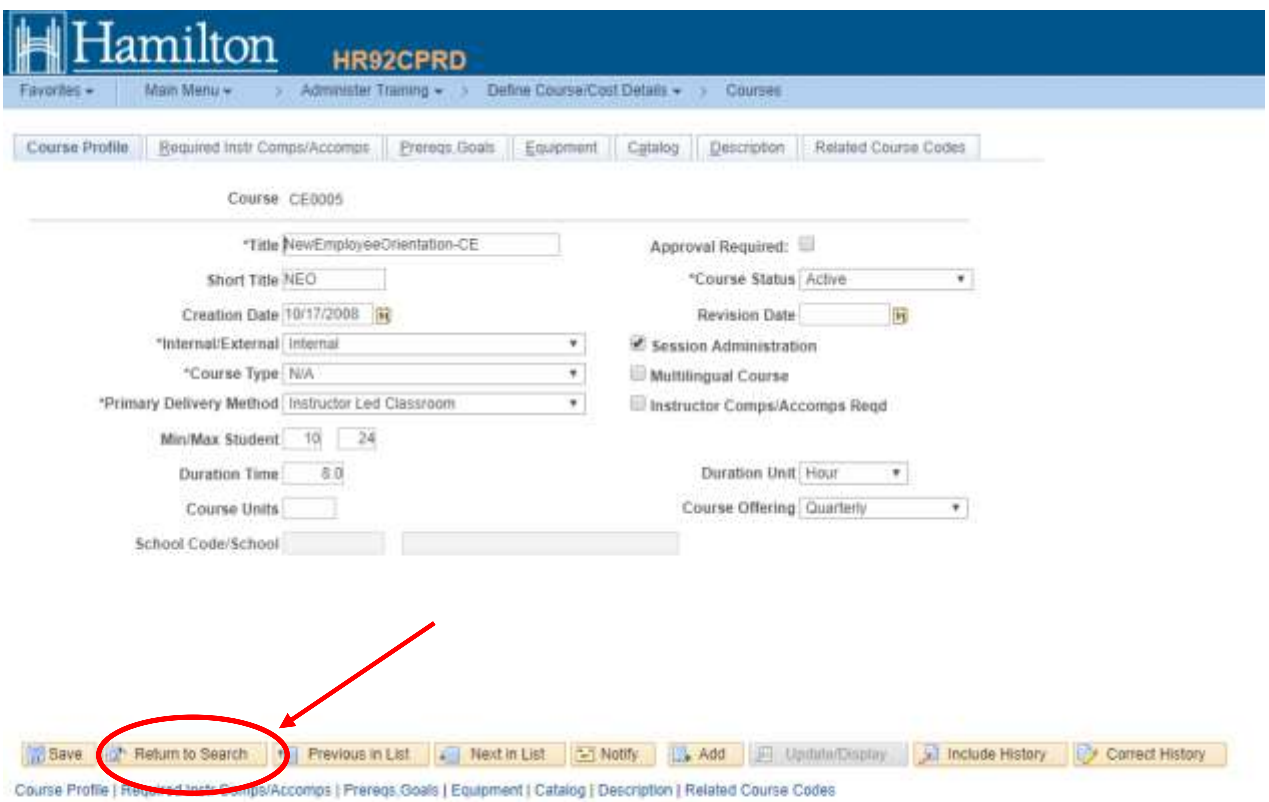
Step Five: Click the course that you want to view.



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



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



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.

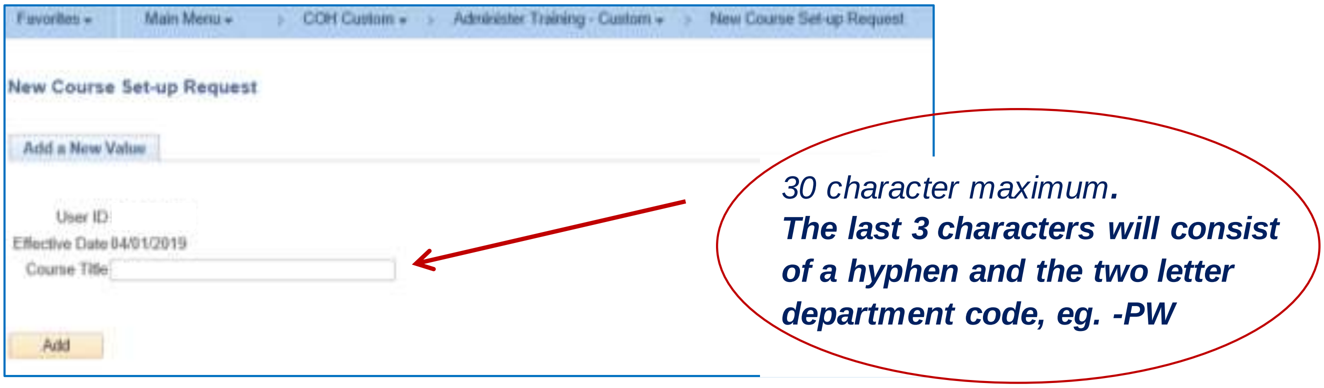
Step One: Check PeopleSoft courses to ensure that this course does not already exist in the system. (see Viewing Course in PeopleSoft)

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.

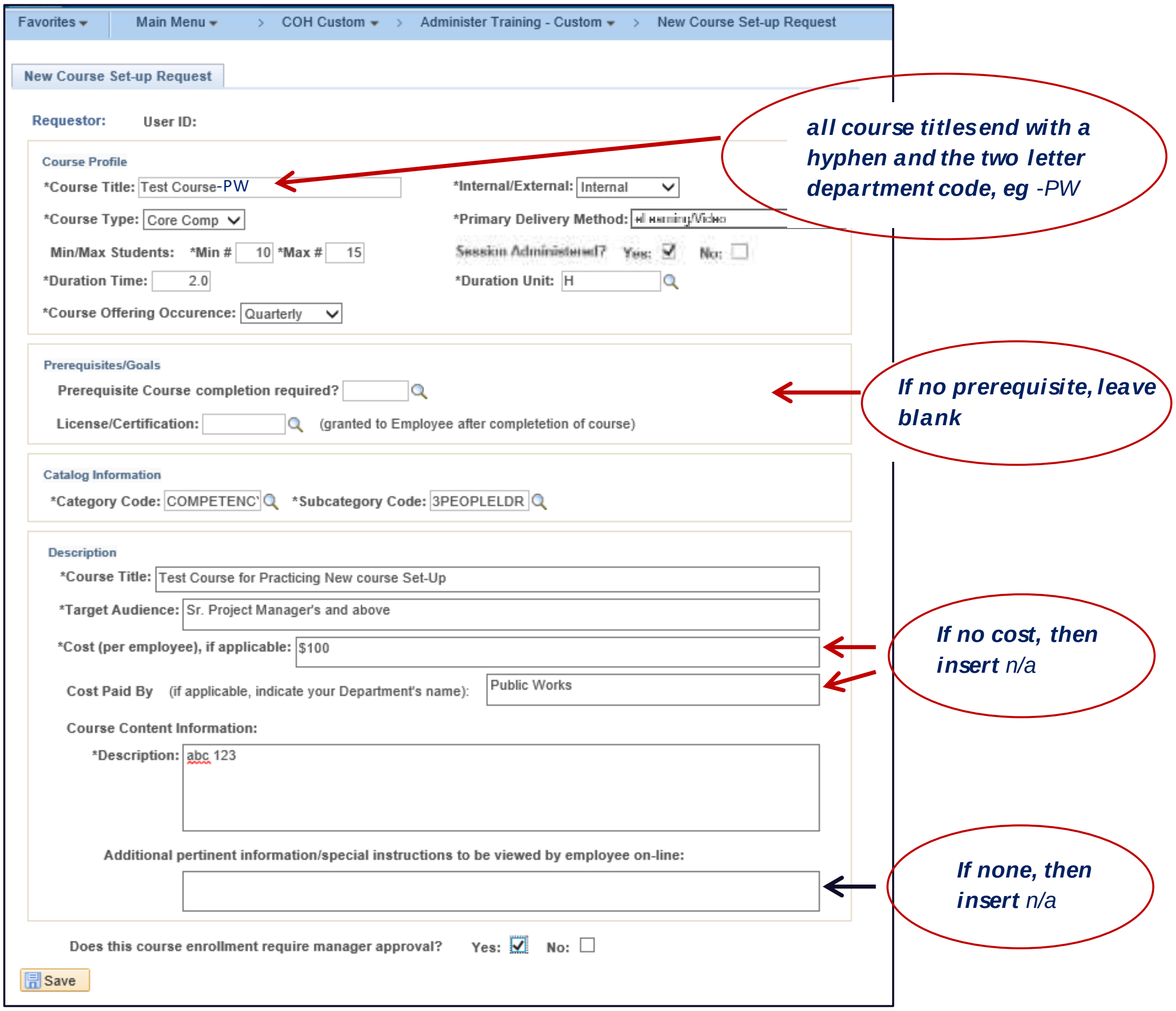


Step Three: Provide information about the course as requested in the fields within each section.

1. Fill out required fields in the New Course Set-up Request. Required fields are identified with an asterix *. 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:


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

New Course Set-up Request

Requestor: User ID:

Course Profile

*Course Title: Test Course-PW
*Internal/External: Internal
*Course Type: Core Comp
*Primary Delivery Method:
Min/Max Students: *Min # 10 *Max # 15
Session Administered? Yes: ☑ No: ☐
*Duration Time: 2.0
*Duration Unit: H
*Course Offering Occurence: Quarterly

Prerequisites/Goals

Prerequisite Course completion required?
License/Certification: (granted to Employee after completetion 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
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:

Does this course enrollment require manager approval? Yes: ☑ No: ☐

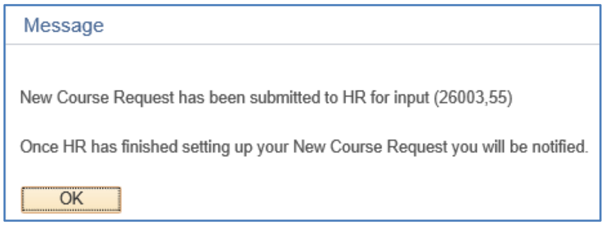
Save

NOTE: <u>Course Profile section</u> - 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: <u>Description section</u> – 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:

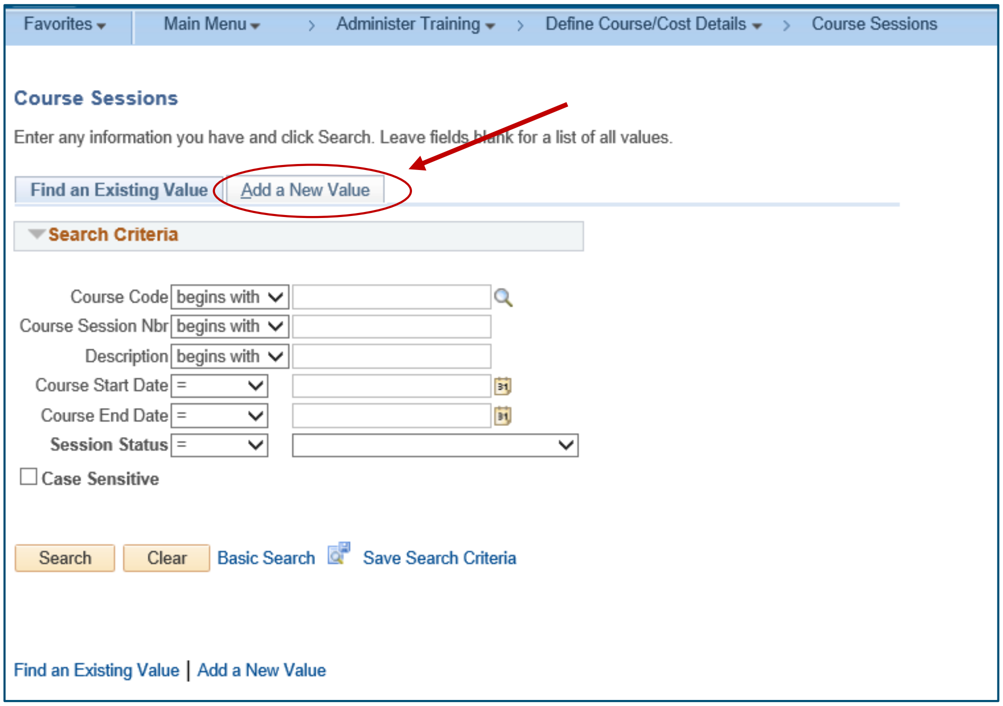
1) Training Coordinator must populate the required fields for creating a new course session.
2) Once the session information is saved, the course session will automatically be assigned a session number and saved into PeopleSoft.
3) The session dates are now available for employees to view and enrol.

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

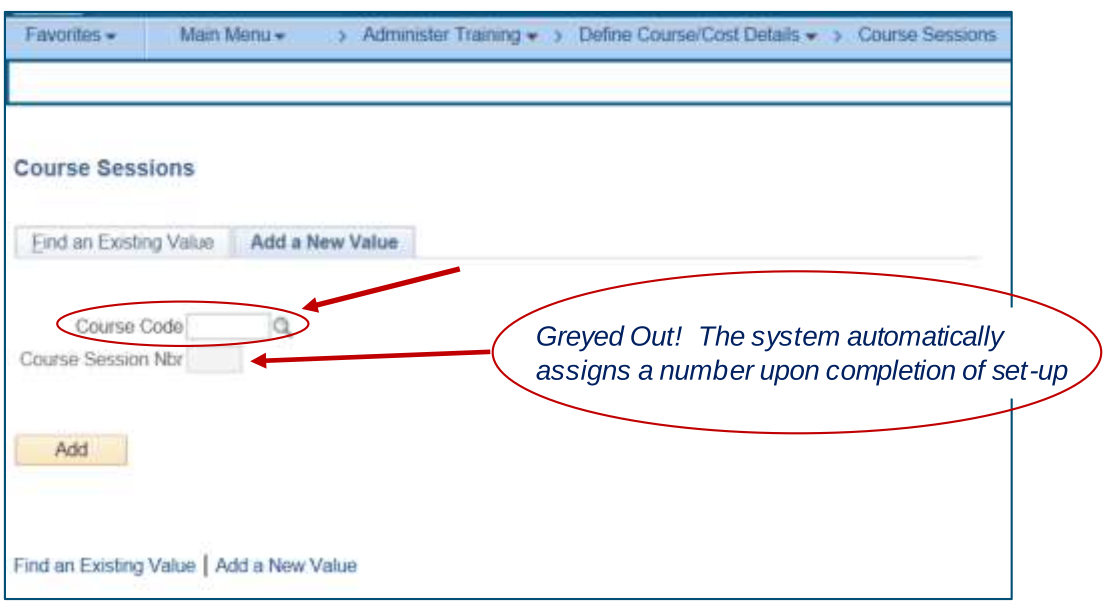
Step One: Create a Course Session

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.

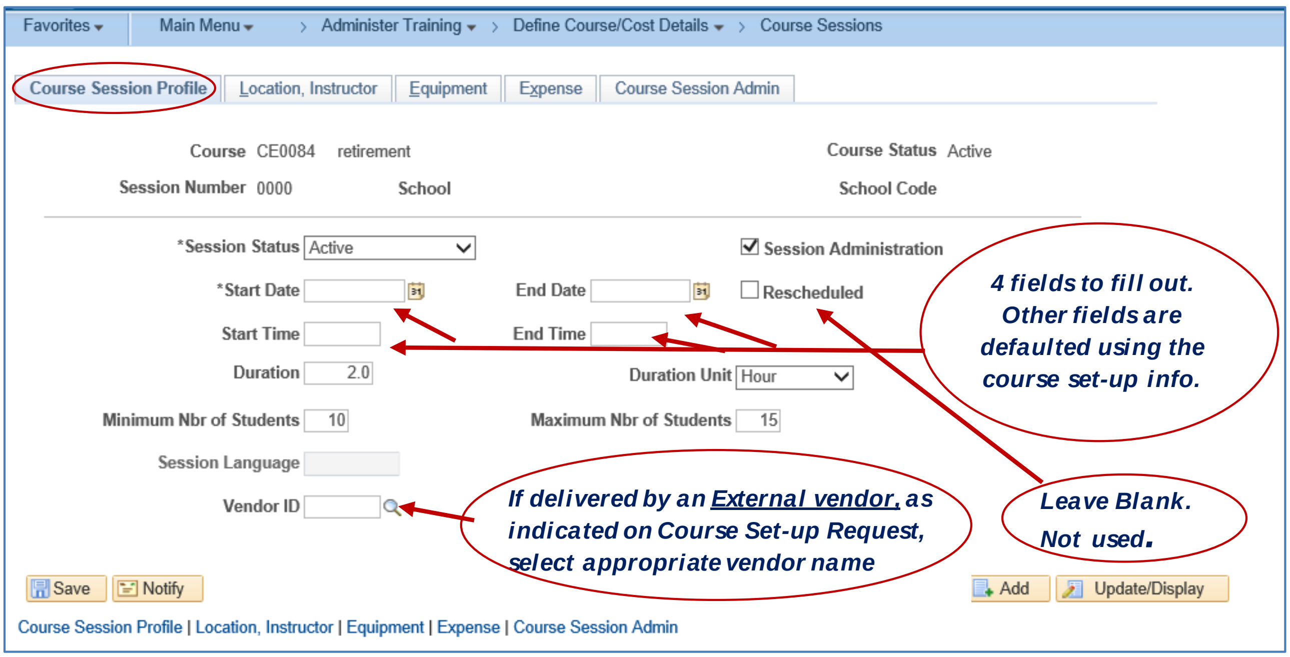


6. Select “Add”. This will bring up the Course Session tab.

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**



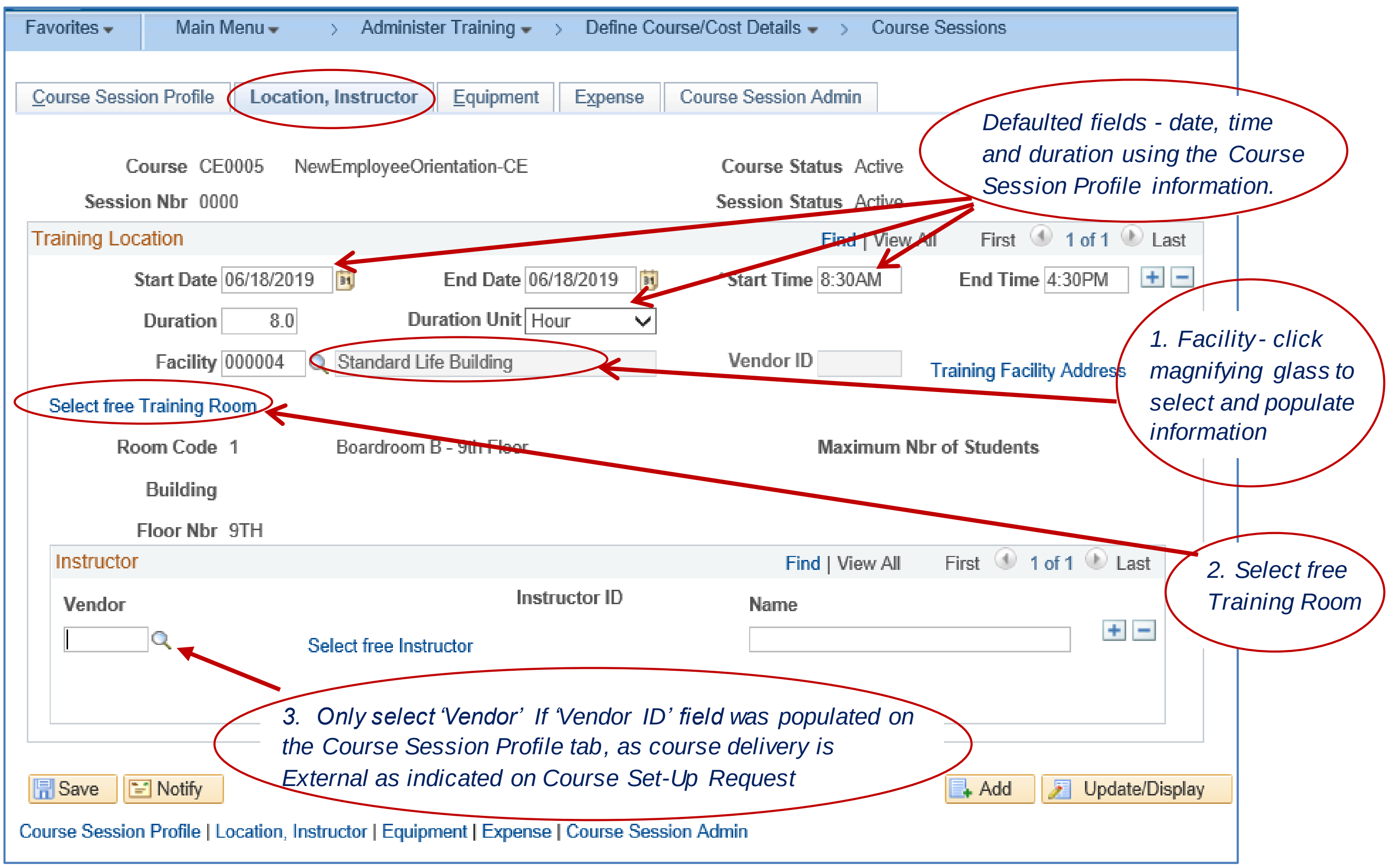
NOTE: Some fields are pre-populated by the system using the course information.

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. **<u>DO NOT click Save yet</u>.**



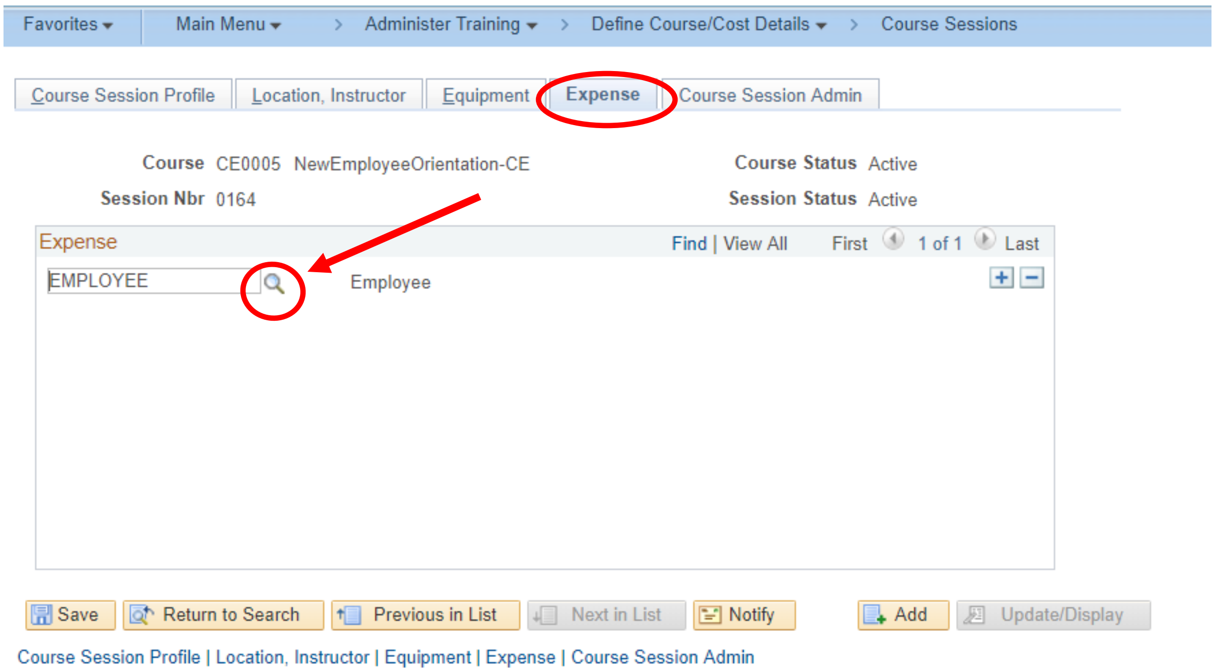
NOTE: If a <u>facility location is not on the list</u>, contact to Human Resource Training Administrator to add to the list.

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

Step Five: Enter the Cost Associated with the Course Session

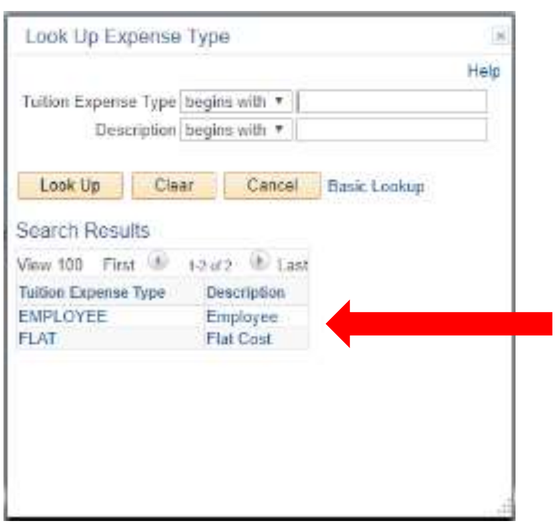
1. **Select the "Expense" tab**

2. **Click on the magnifying glass** next to the expense field to look up expense type



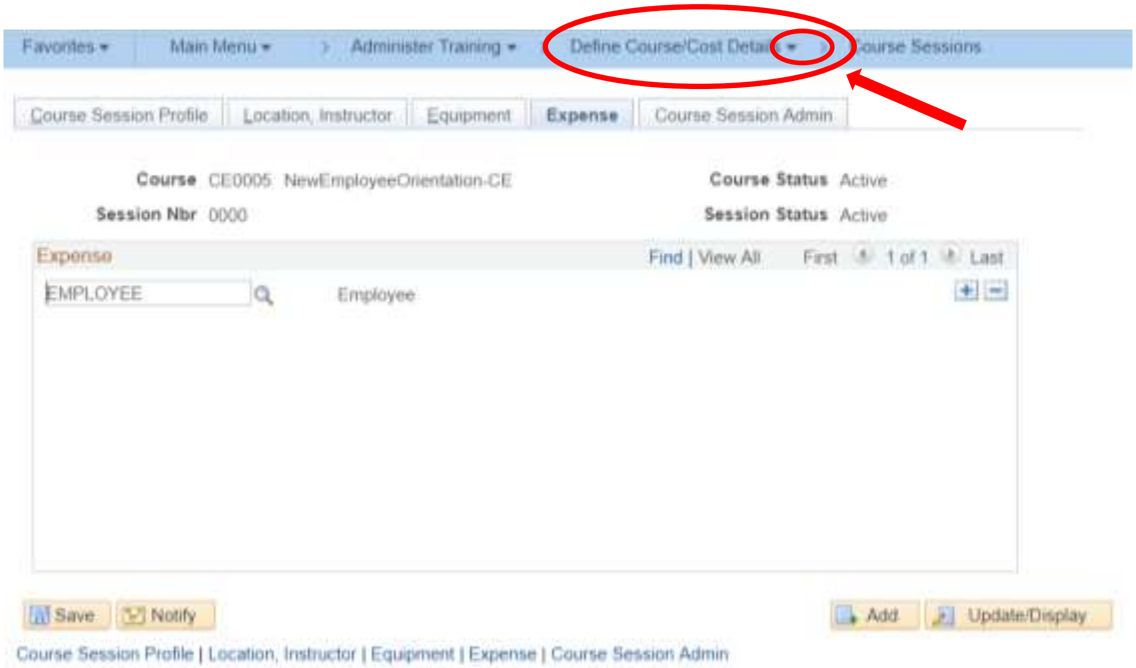
The "Look Up Expense Type" Table will appear

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

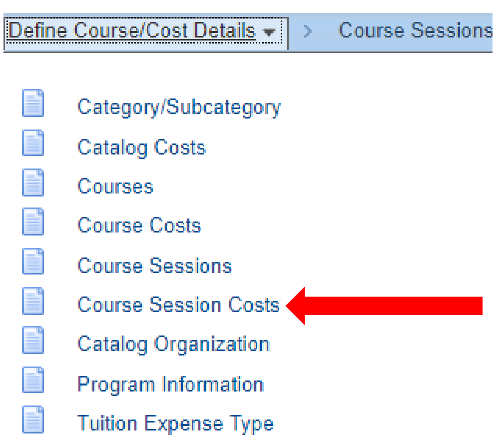


4. Click ‘**Save**’

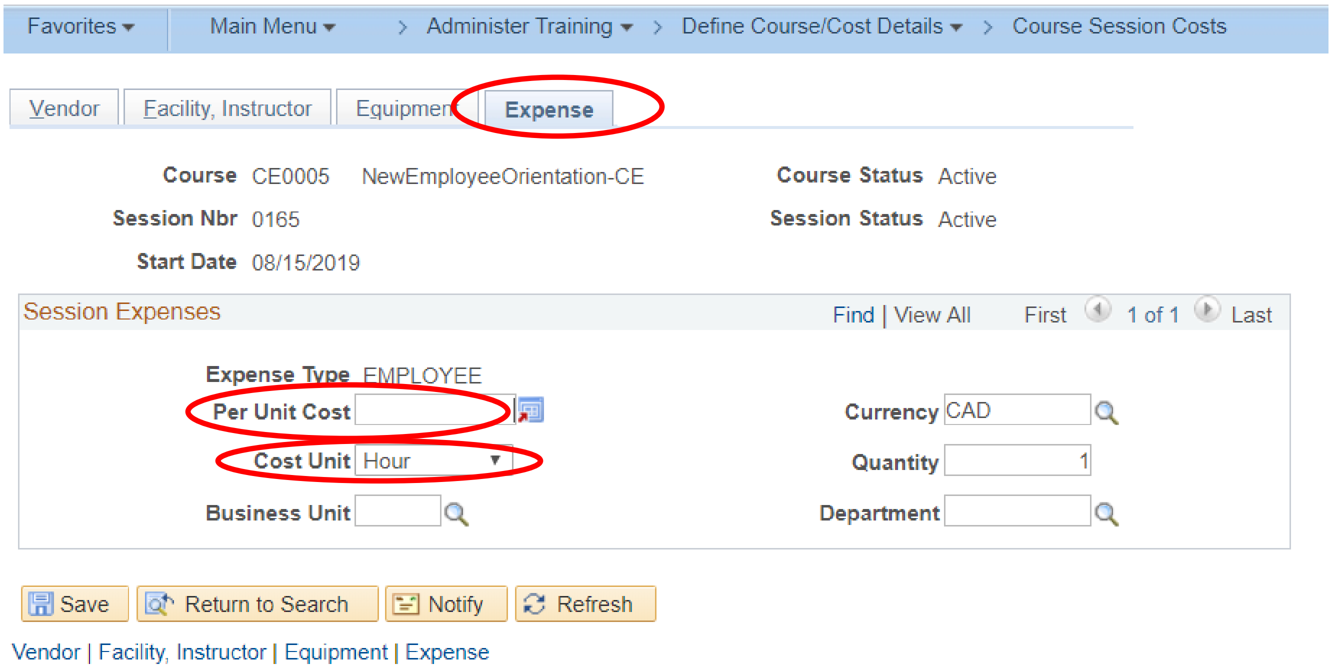
5. At the top of the page **‘Define Course/Cost Details, Select the drop-down arrow**



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



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



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

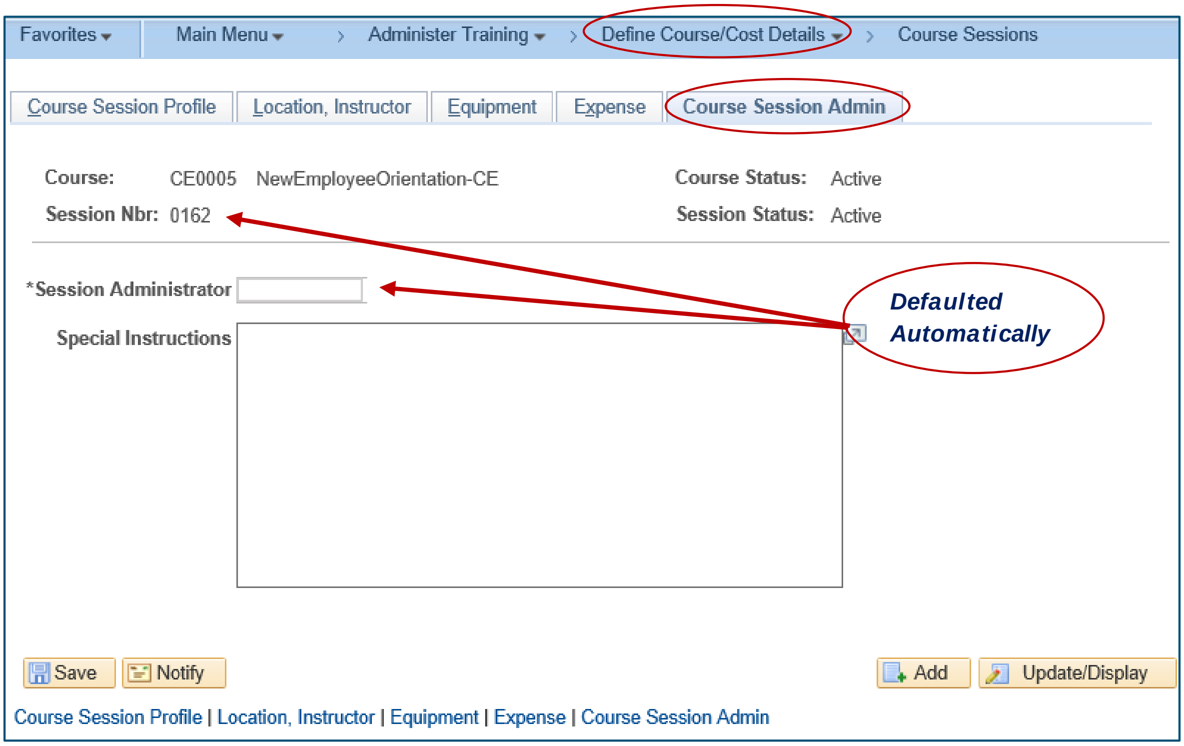
9. **Enter the cost** in the “Per Unit Cost” field

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.



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.

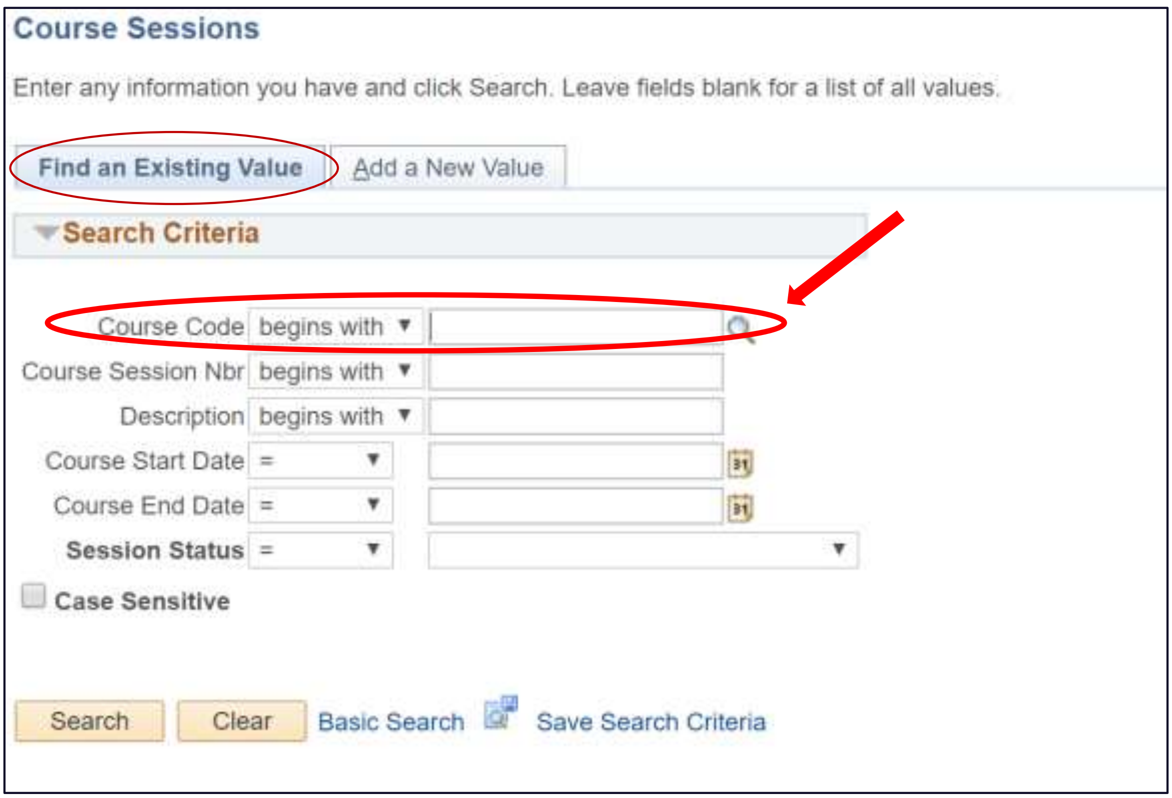
View Course Sessions in PeopleSoft

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.

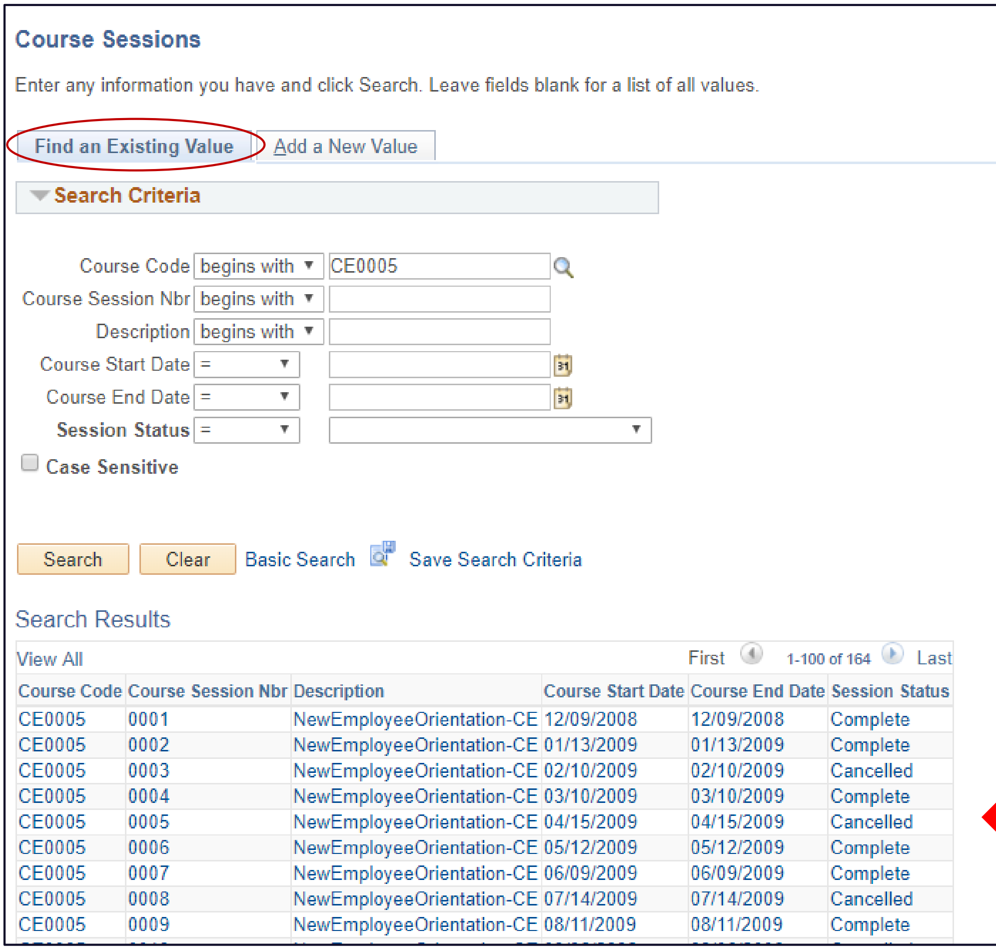
Step One: Navigate to the Course Sessions Table

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

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



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

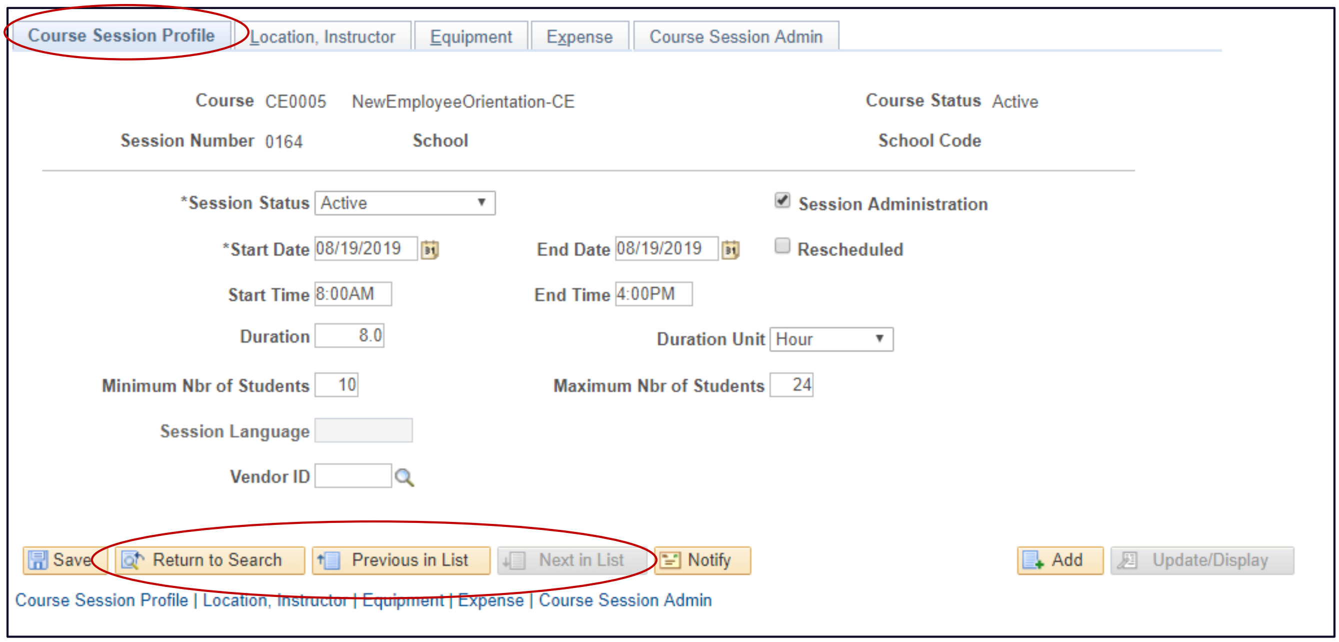
View All — First 1-100 of 164 Last

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…



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.

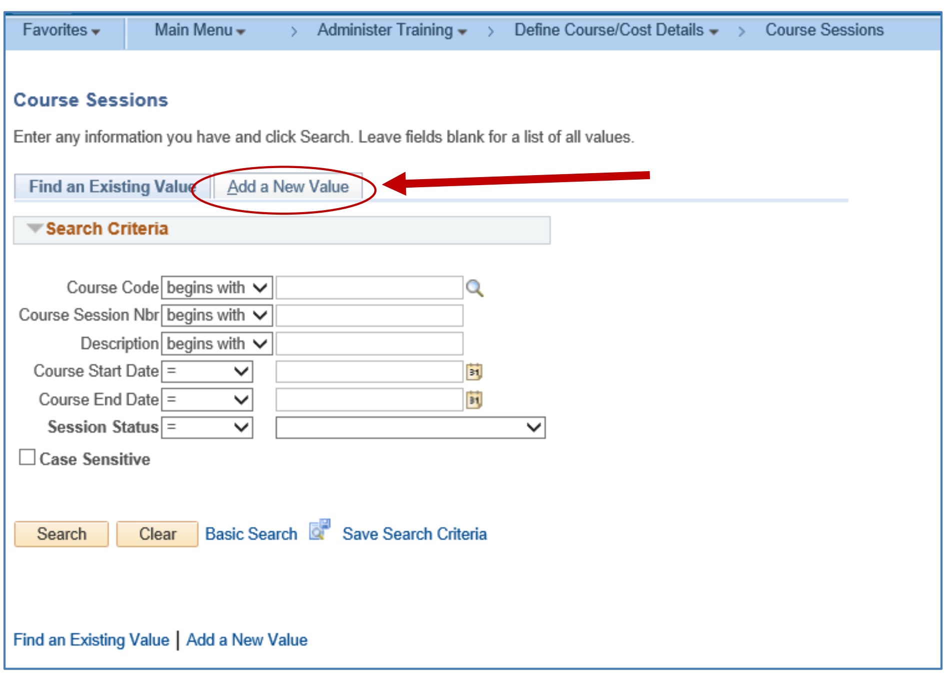
Process Overview:

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.

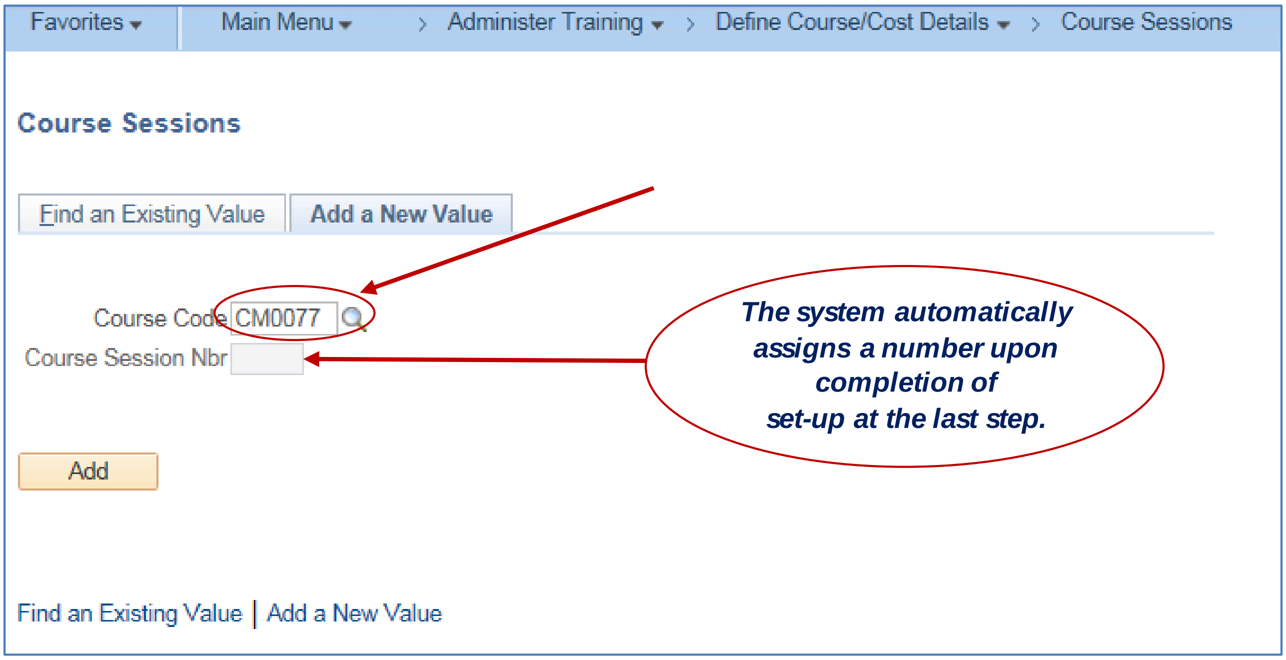
Step One: Navigate to Course Session, Add New Value Tab

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



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.**



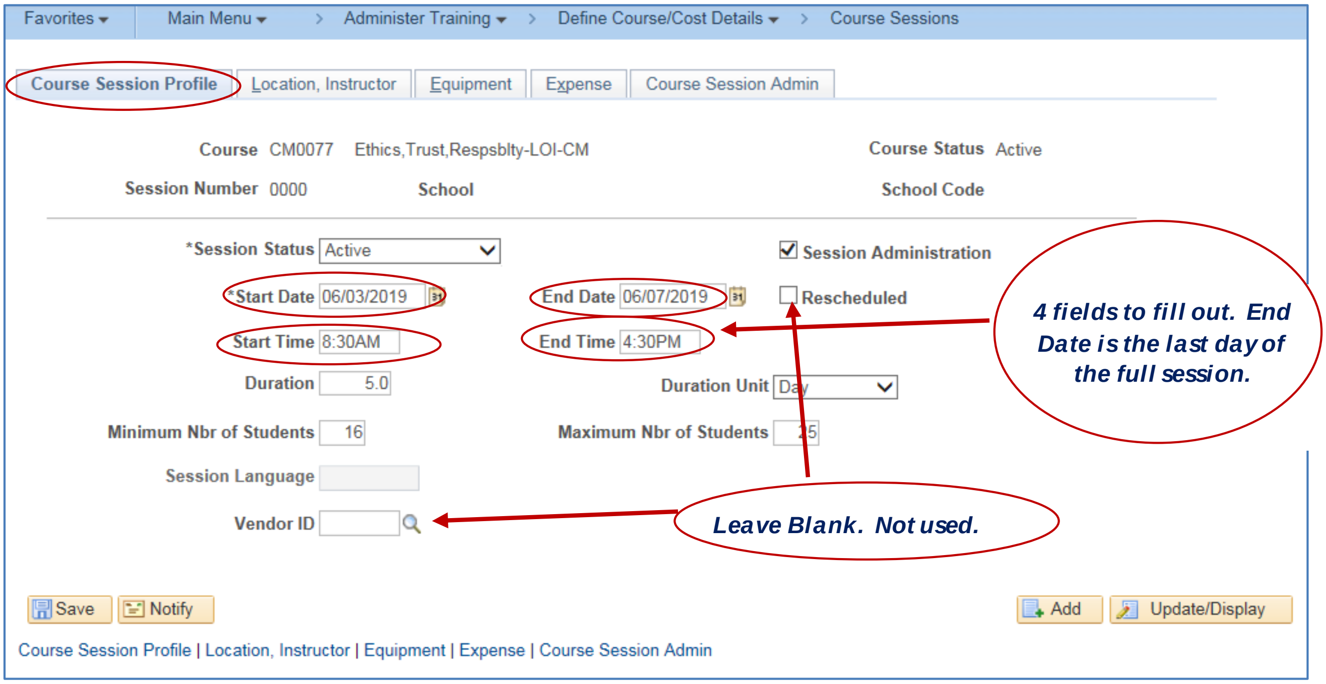
REMINDER: course codes are assigned by the Training Administrator and emailed to Training Coordinator upon completion of the New Course Set-up Request.

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.



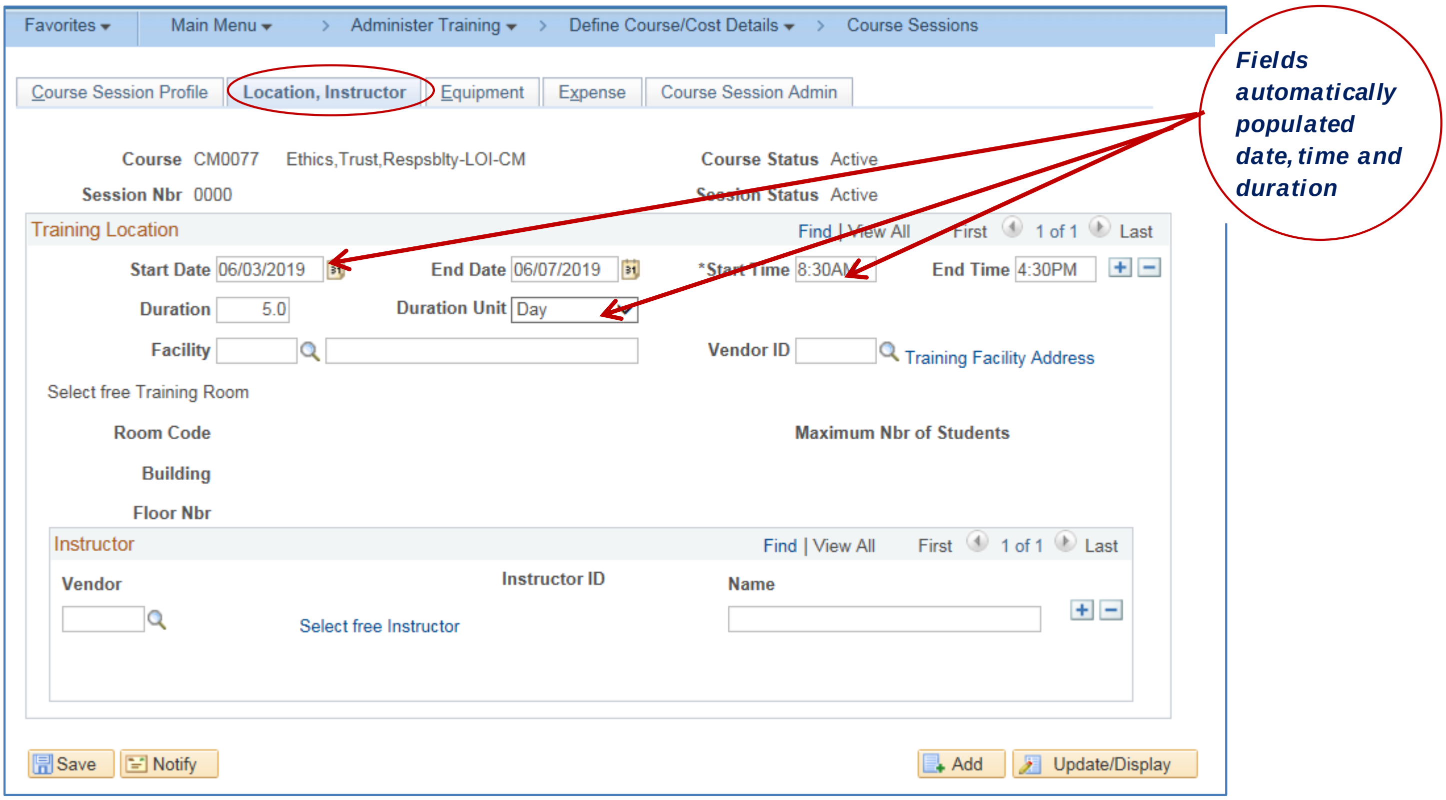
DO NOT click Save yet.

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.



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

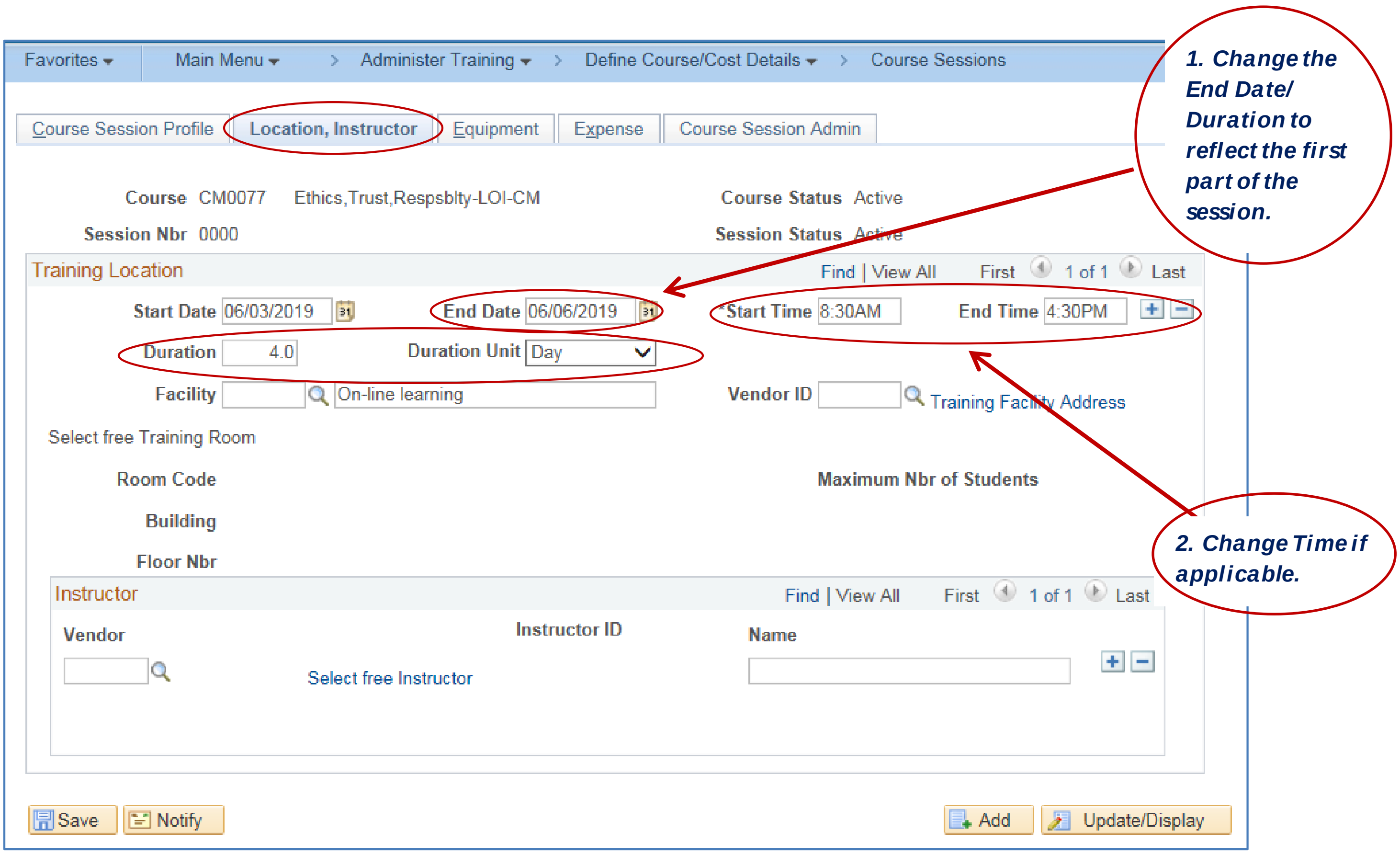
Step Five: Override Default End Date to reflect the end date of the **first part** of the session

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

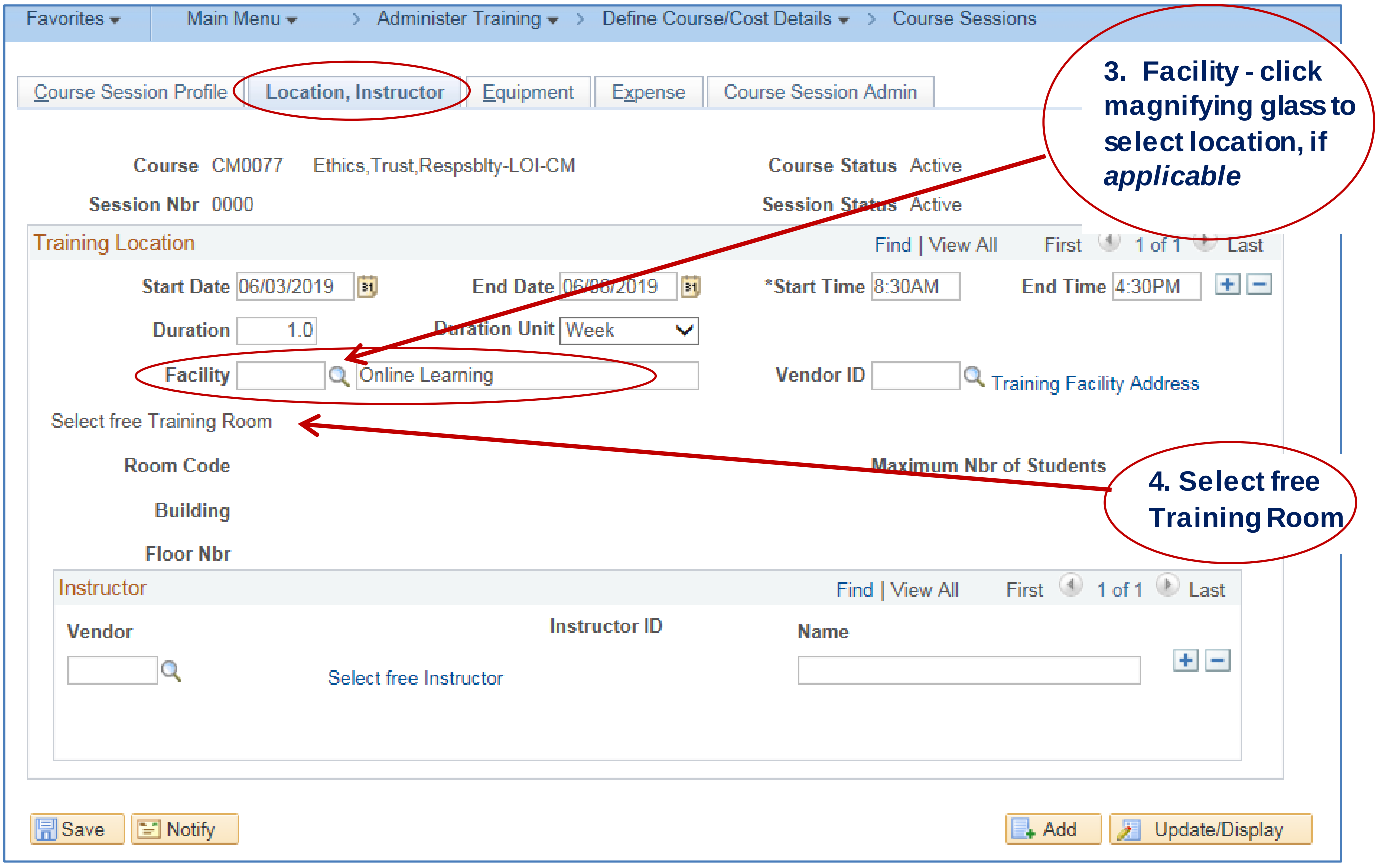
DO NOT click Save yet.

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.



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

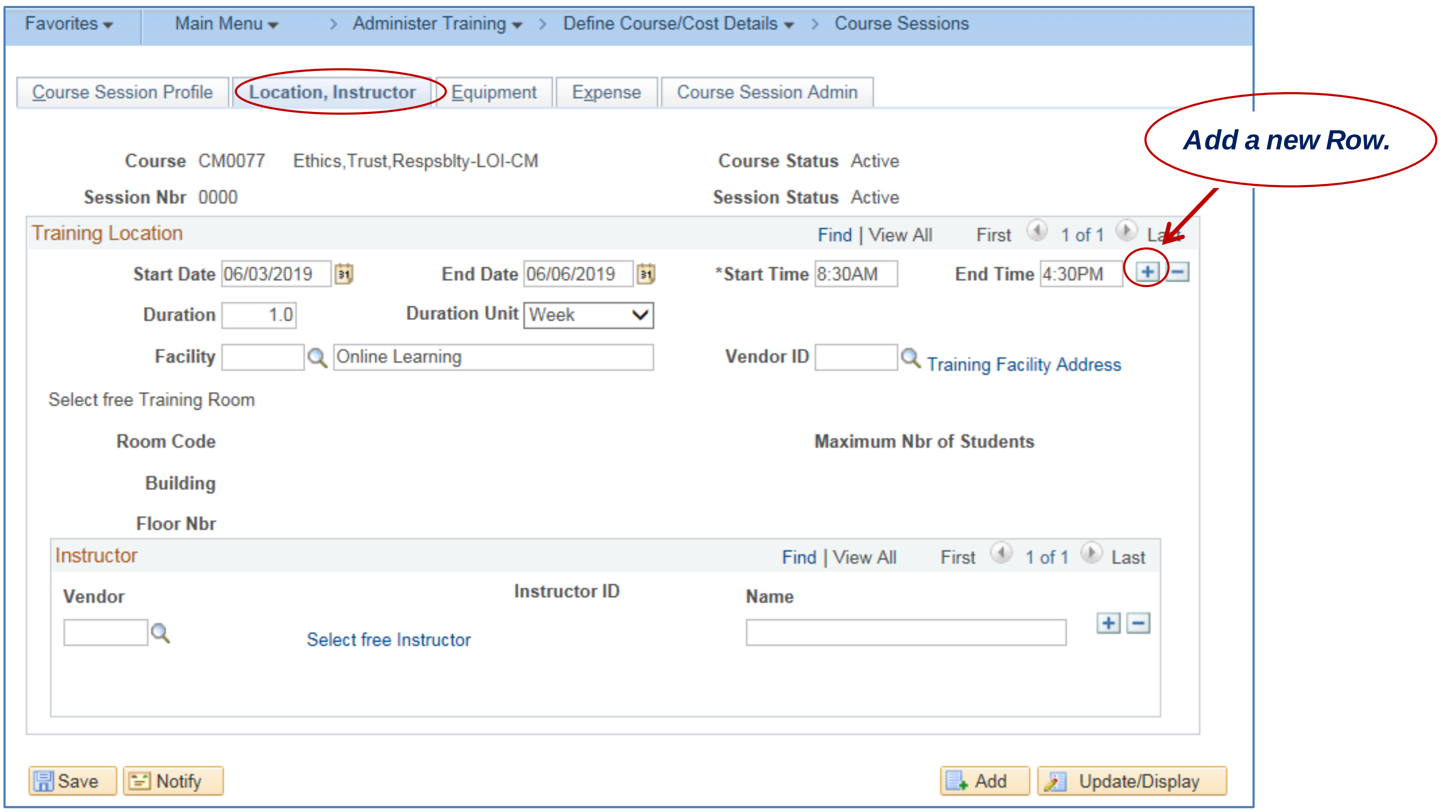


DO NOT click Save Yet.

NOTE: If a <u>facility location is not on the list</u>, 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

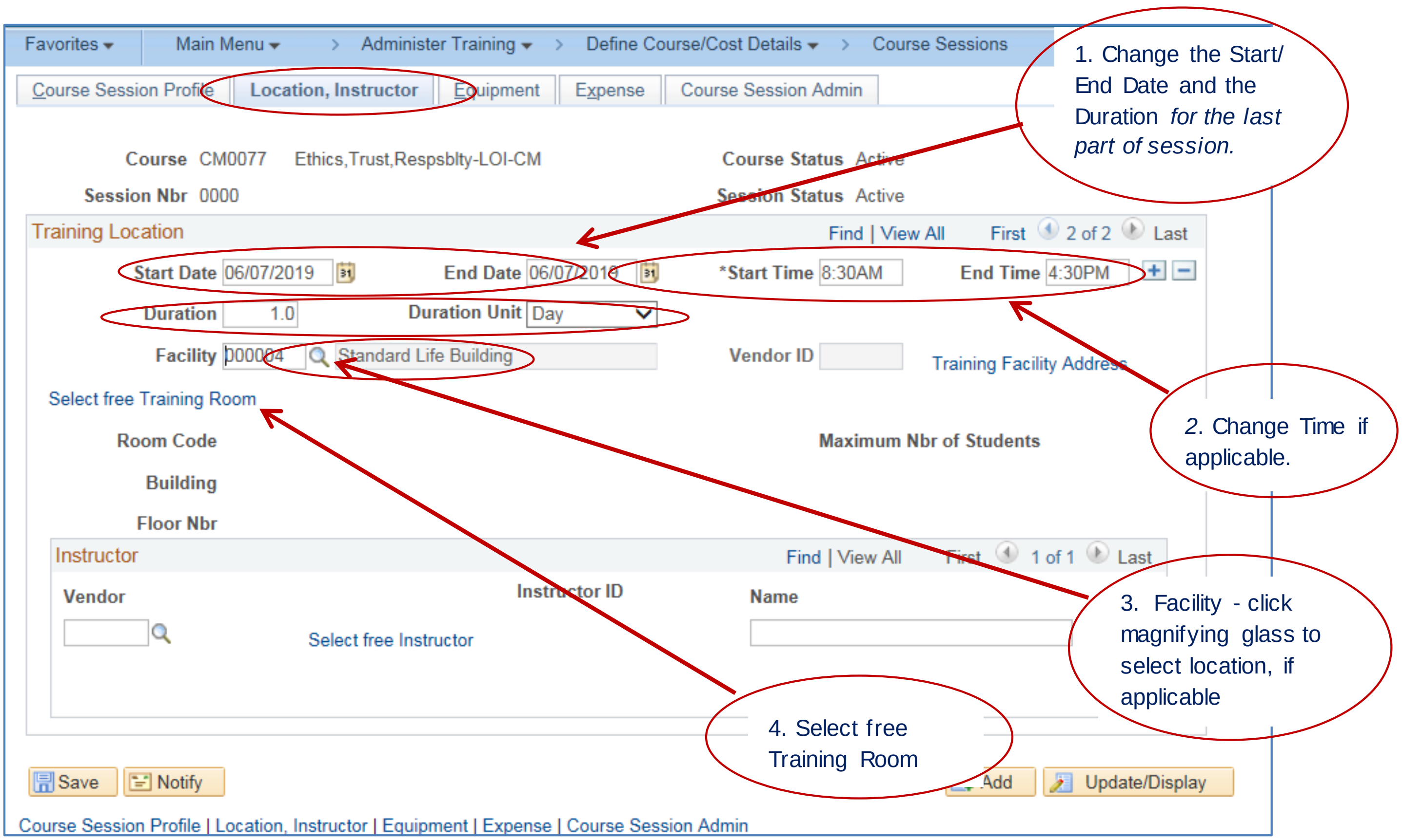
NOTE: You can create as many new Training Location rows as required



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.

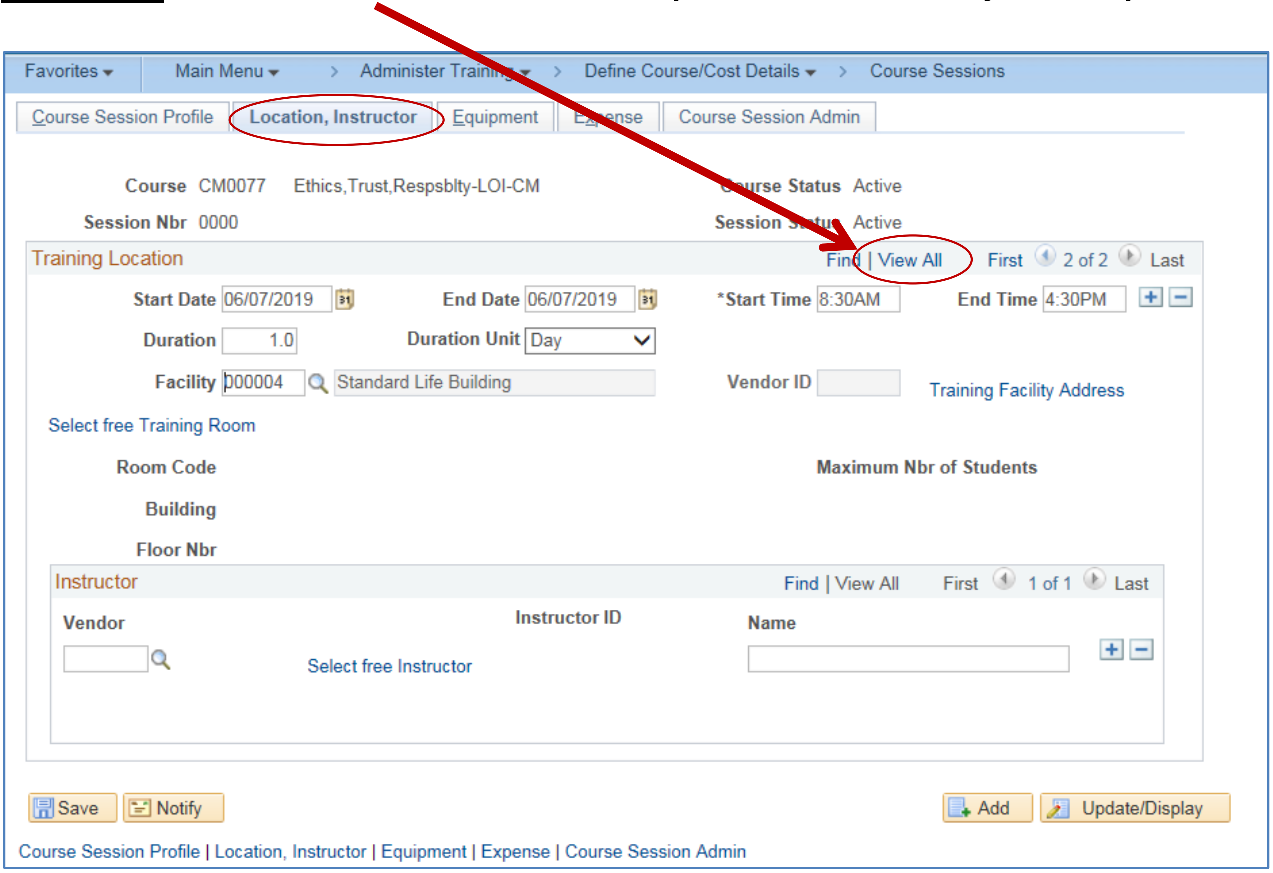
NOTE: In this example, to create an additional section, the Start/End Date was changed to 06/07/2019. The Duration was changed to 1 day.



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.

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



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

NOTE: The total of the <u>Duration for all session parts must equal</u> 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.

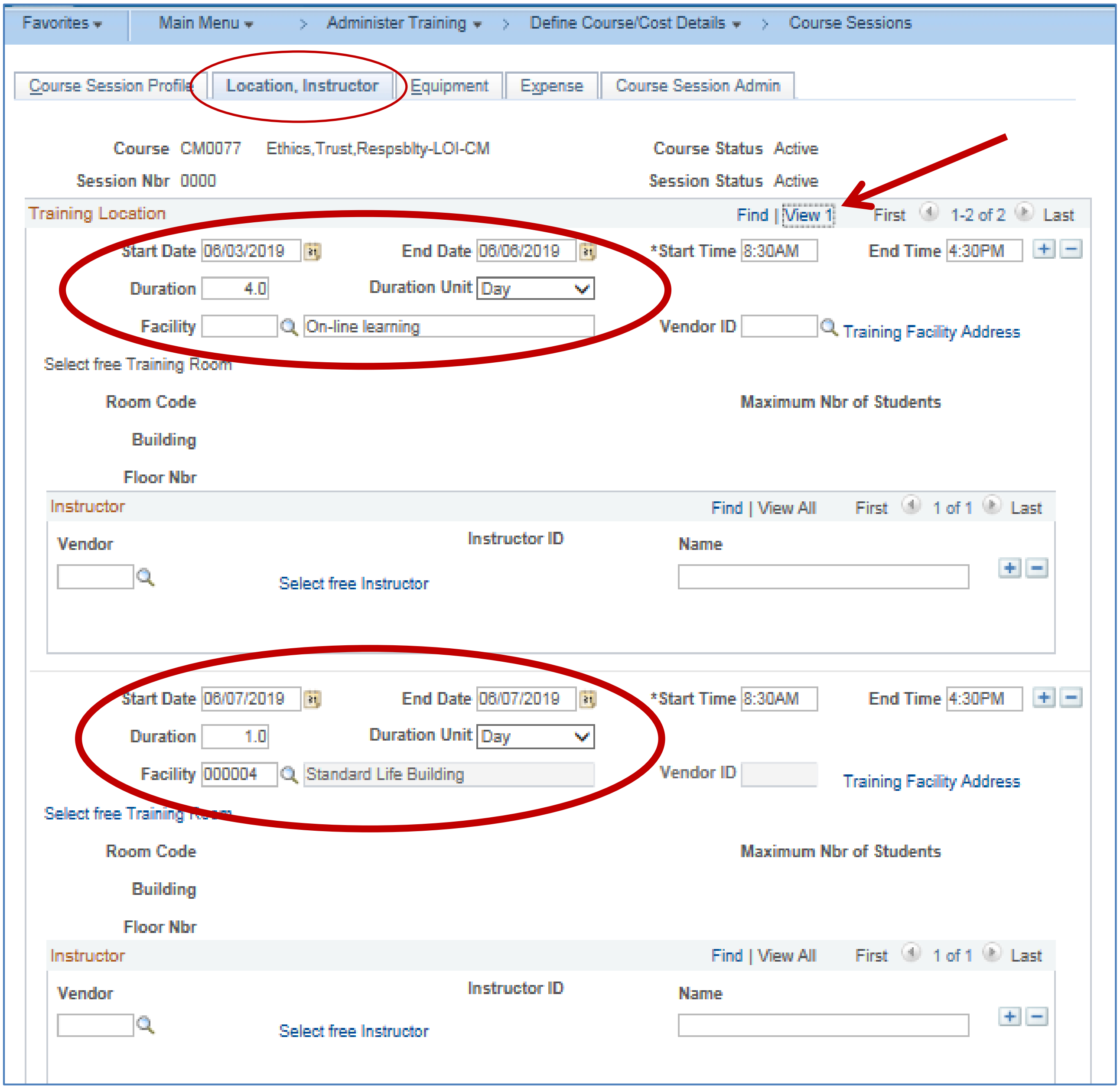
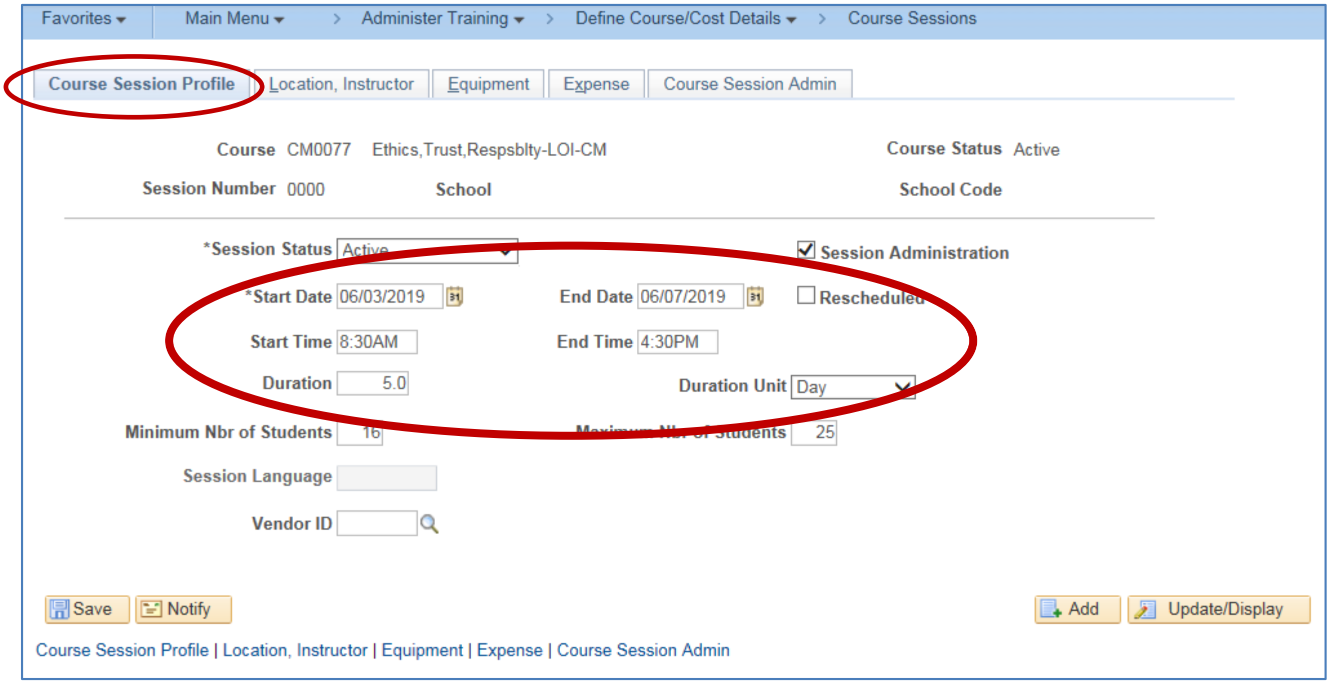


Image B: Course Session Profile



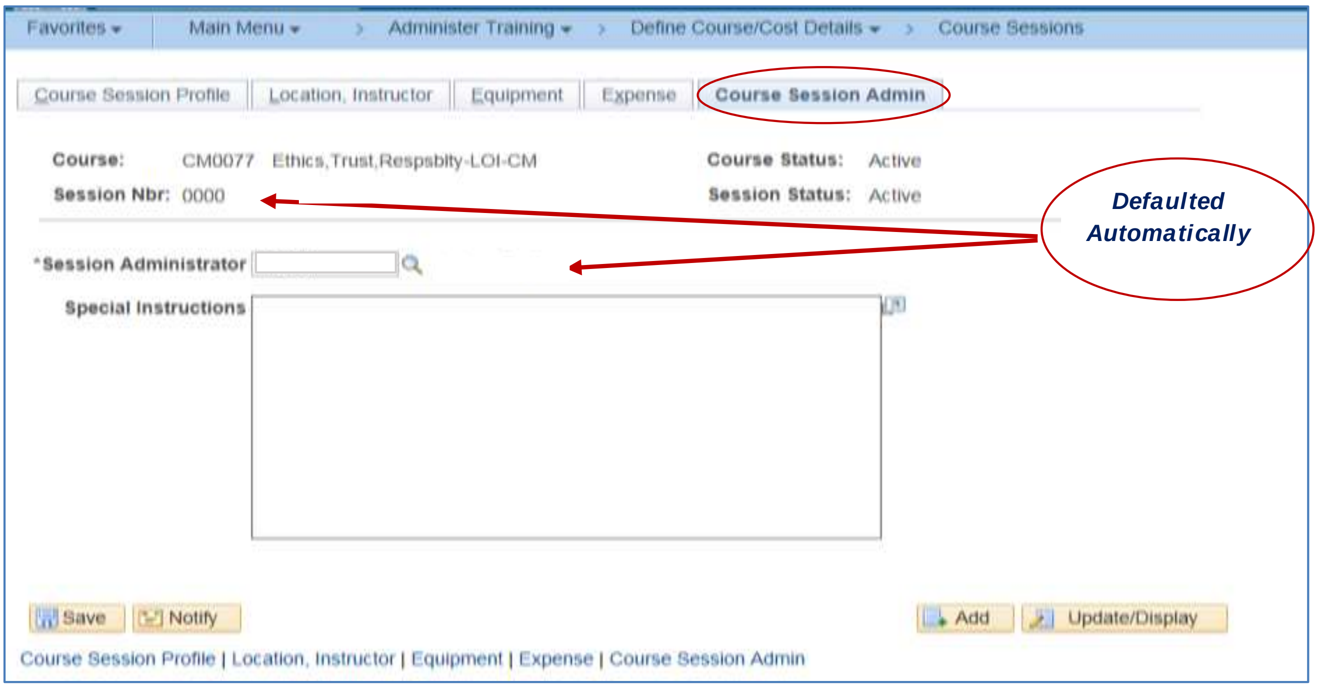
In Image A example, on the previous page, the 'Location, Instructor' tab information of the **Start date of the first part of the course (06/03/2019)** and the **End Date of the last part of the Course (06/07/2019),** and **the total Duration from both parts MUST match Image B: the Course Session Profile**.

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

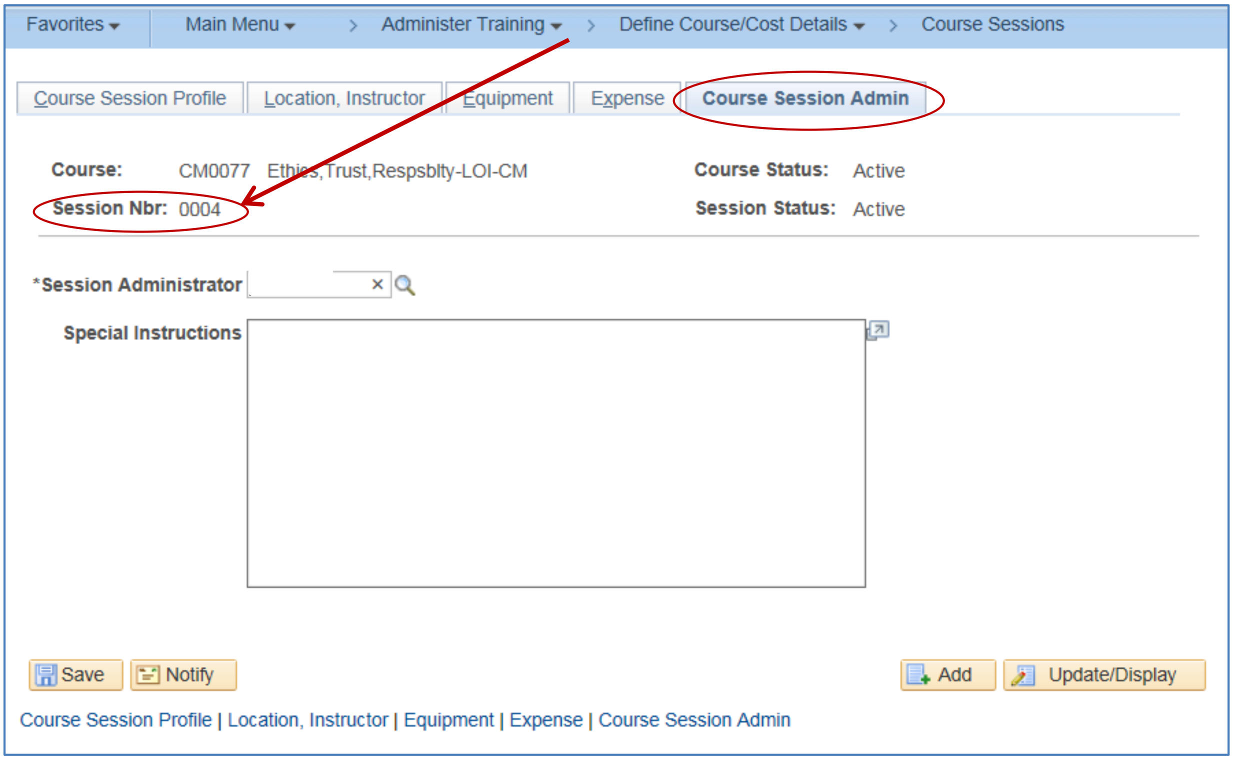
Navigation: **click Course Session Admin tab.**

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



Step Eleven: Save Course Session

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



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

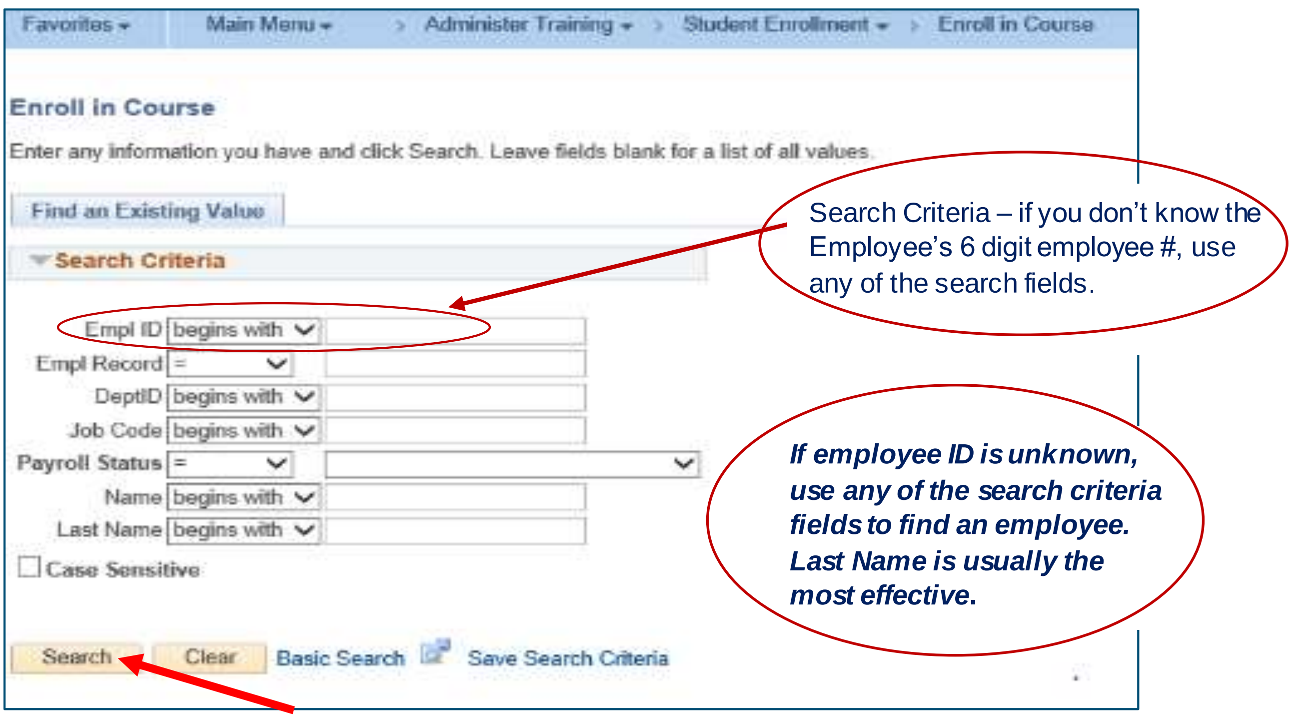
Training Coordinators can enroll employees into a non-session course. A non-session course is a course where there are no session dates attached to the course.

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

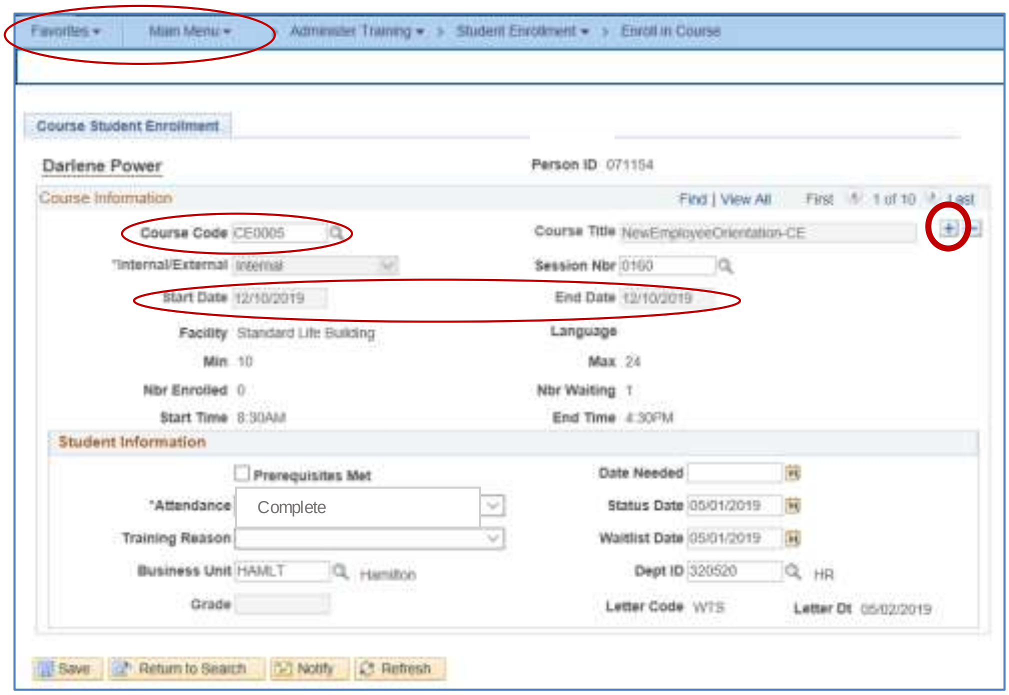
Step One: In the Student Enrollment, Enroll in Course Tab, search for the employee using Employee ID or last name

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



Step Two: Click the "Search" Button. The Employee's Course Student Enrollment Page will appear.

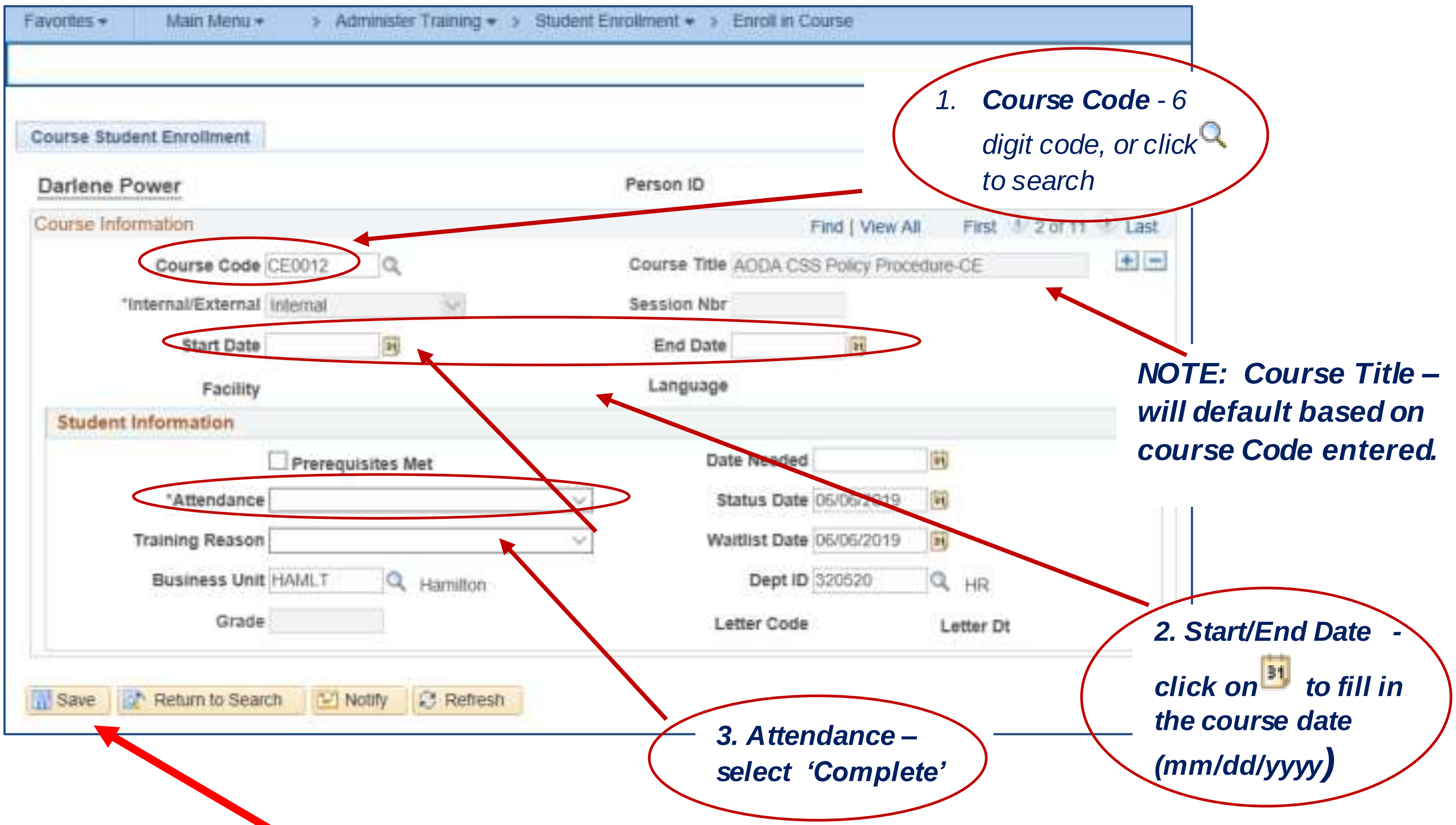
Step Three: If the Employee's Course Student Enrollment page appears and already has courses identified on the page (existing row of data appears) click the + sign to insert a new row to enroll into a course (no session dates).



Step Four: Enter course code

Step Five: Enter start and end date

Step Six: Enter attendance as "Complete"



Step Seven: Select "Save"

Employee is now enrolled in the Course Session!

Step Eight: Click on [Return to Search] 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 <u>Appendix D? 'Confirmation of Notification of Enrollment'</u> to view the information in this automated message.

Enrolling Employee(s) into a Course Session

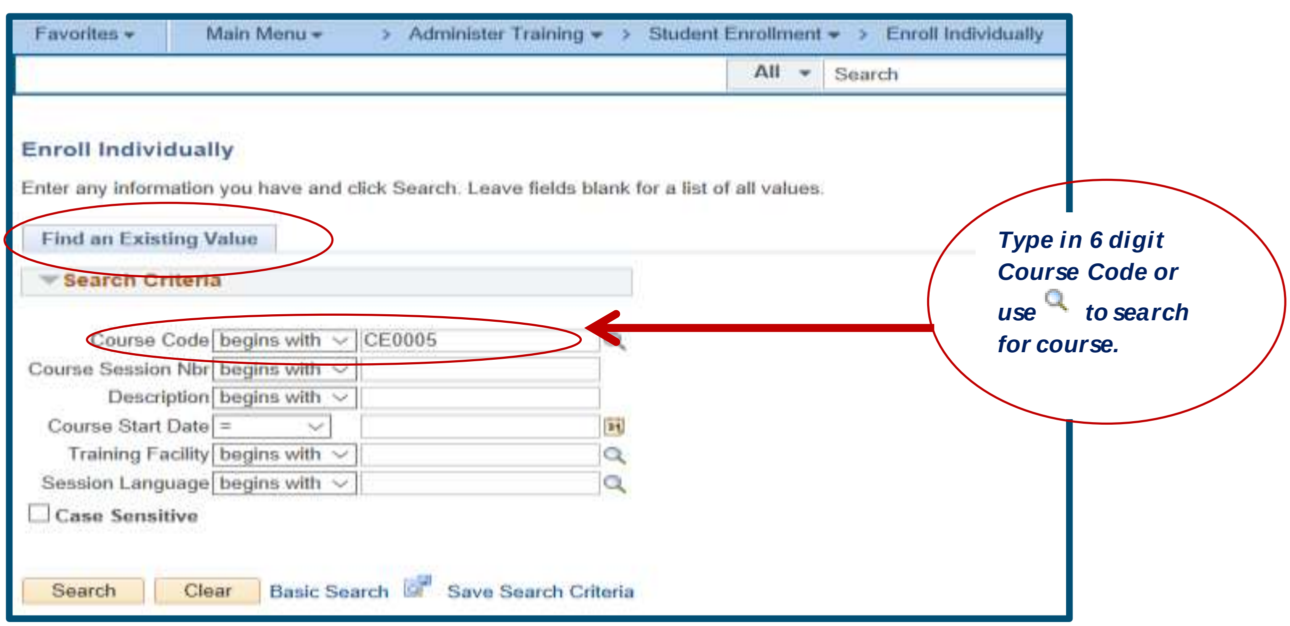
Training Coordinators have the ability to enroll employees into any course session. When a Training Coordinator enrolls an employee, manager approval is assumed, and the system will not generate approval requests.

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.

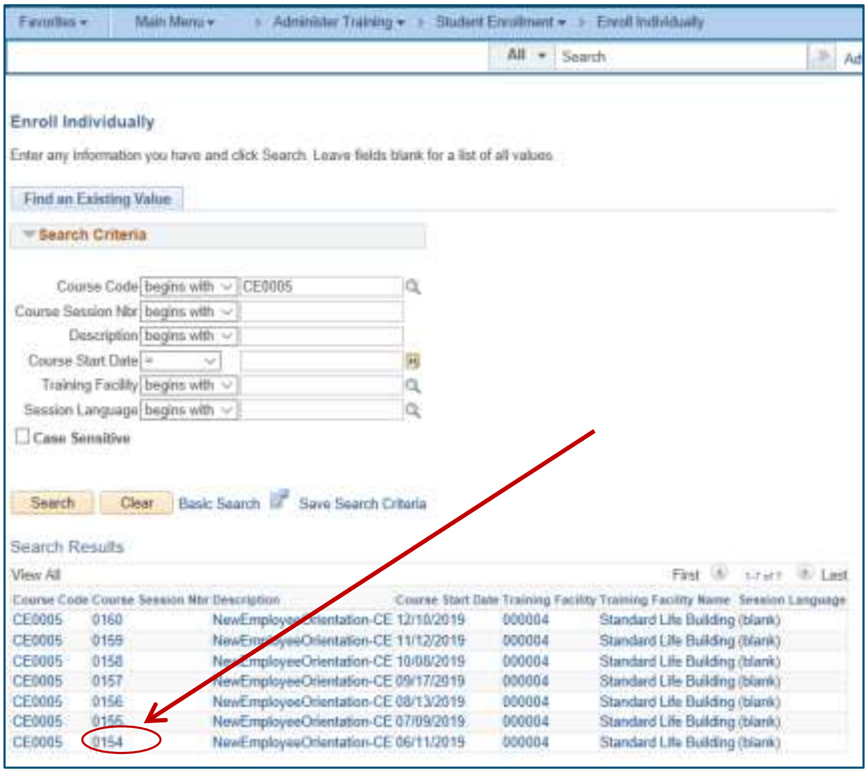
Step One: Upon receiving a request for enrollment, the Training Coordinator must search for a course session

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

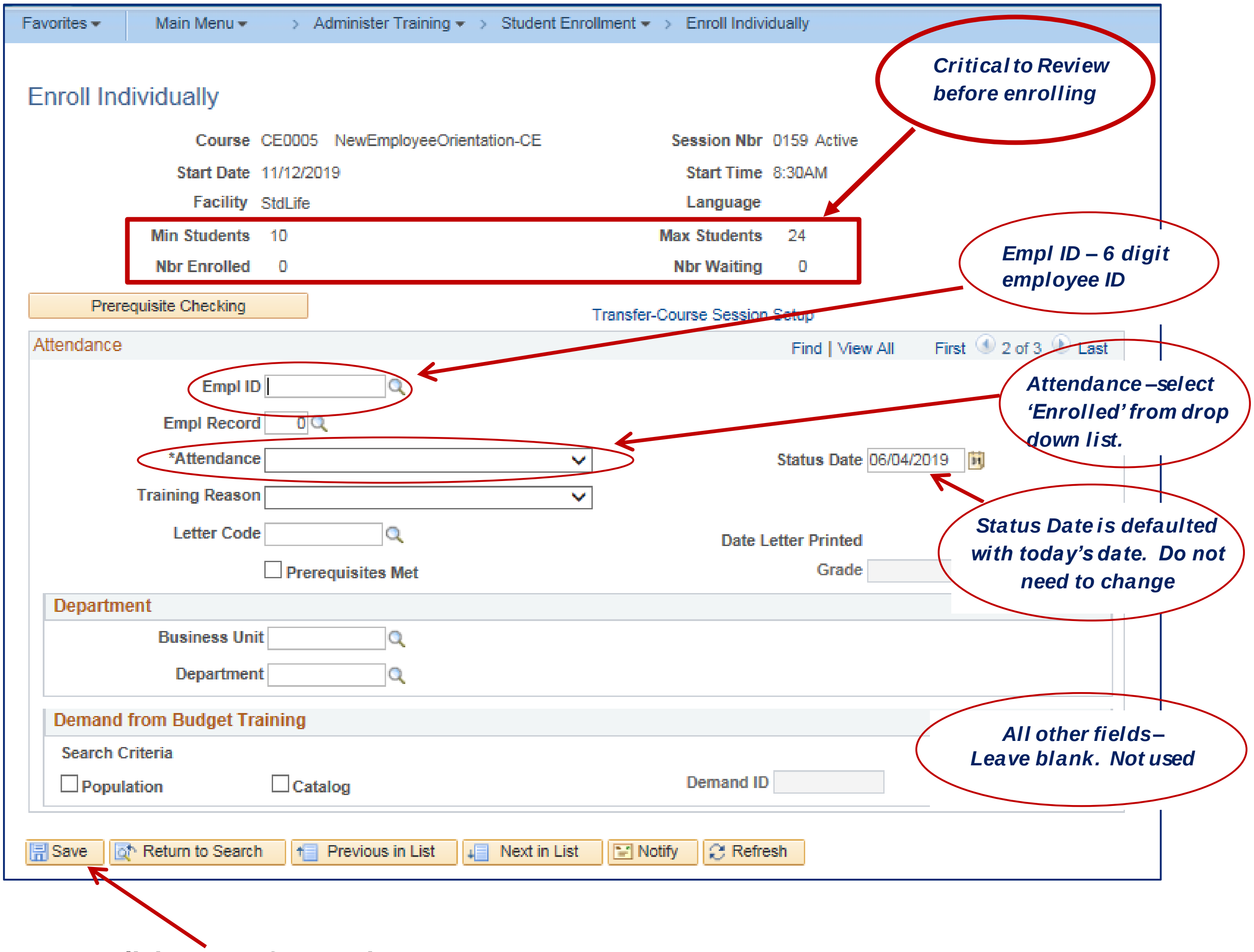


Click on "Search"

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.



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.



NOTE: Click Save after each entry

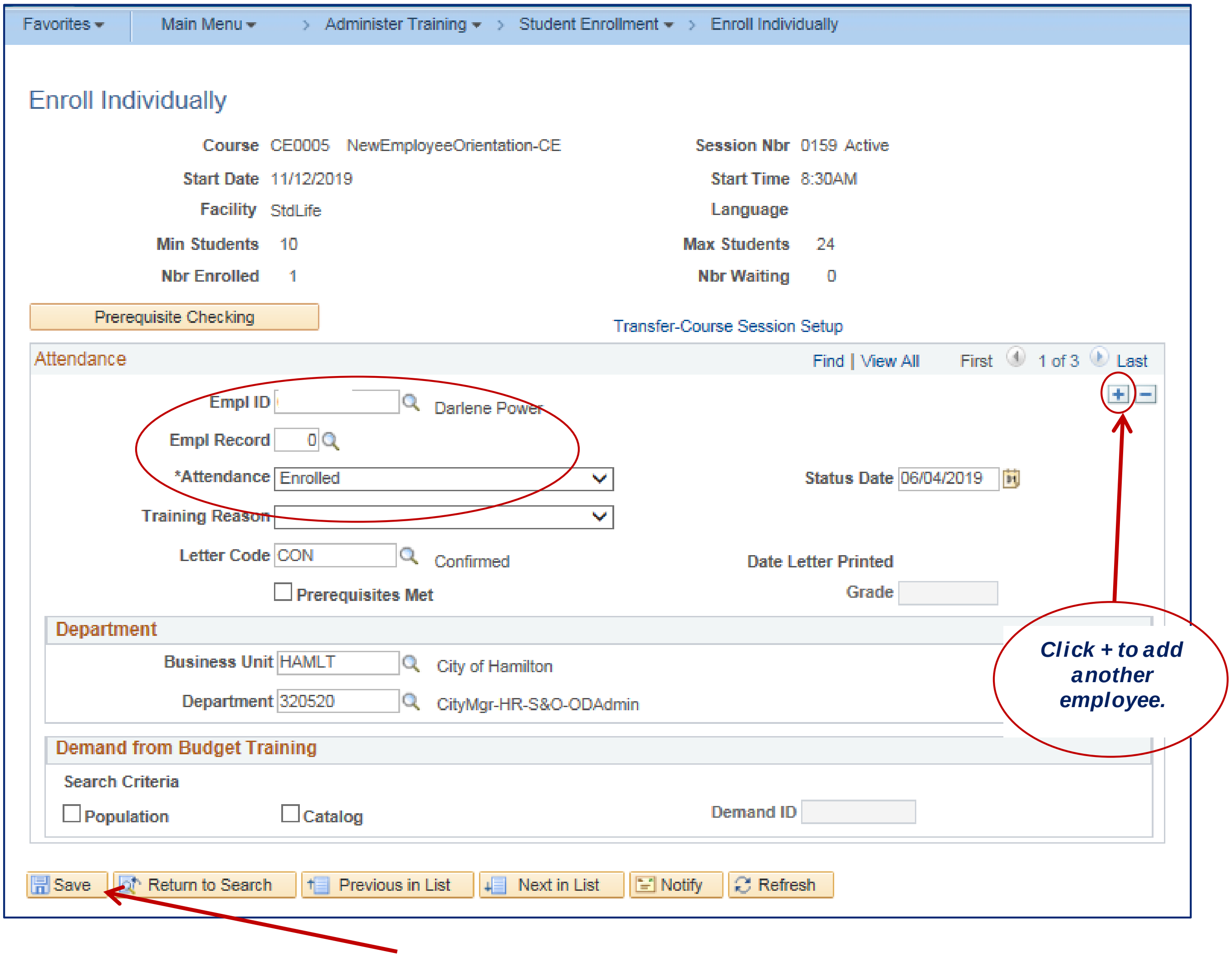
The employee is now enrolled into the course session.

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.**

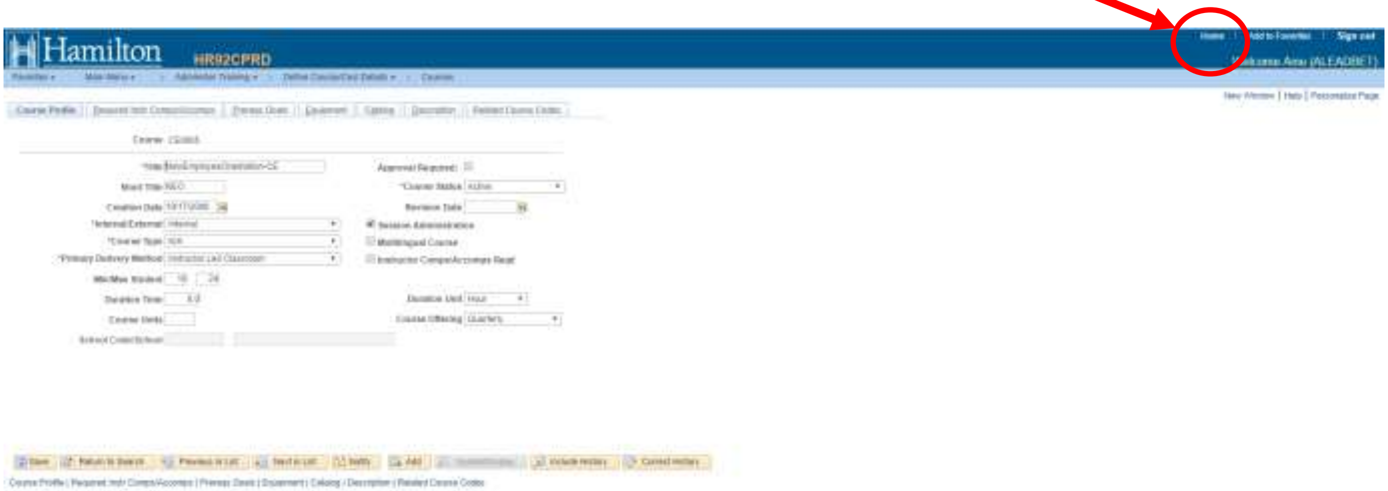


NOTE: remember to click Save after each entry.

Step Five: Save after each employee enrollment entry.

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

Step Seven: If there are no further enrollments, click "home" at the top of the screen to return home



Employees will receive one of the following automated email notifications depending on attendance status:

- Training Enrollment Confirmation
- Training Enrollment Waitlist

NOTE: If there is no room in the course (ie: max capacity has been reached) change the employee status to Session Waitlisted.

Employee is now enrolled in the Course Session!

NOTE: See [Appendix E – Enrollment Email Automated Email Notifications](#) to view the messaging and information provided in each enrollment process notification.

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.

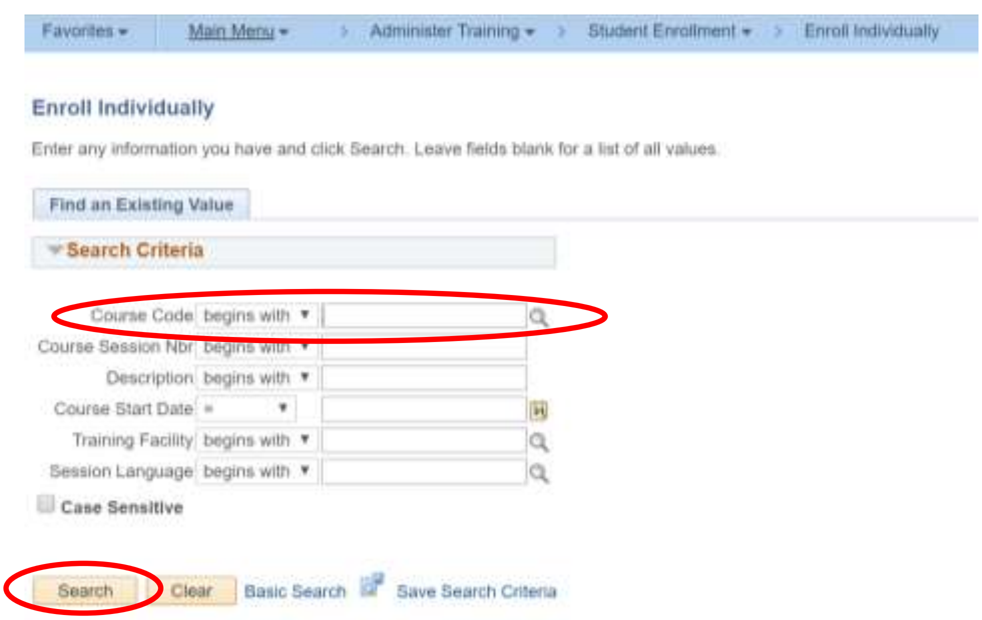
Quick View of Attendance Status

To view the waitlist:

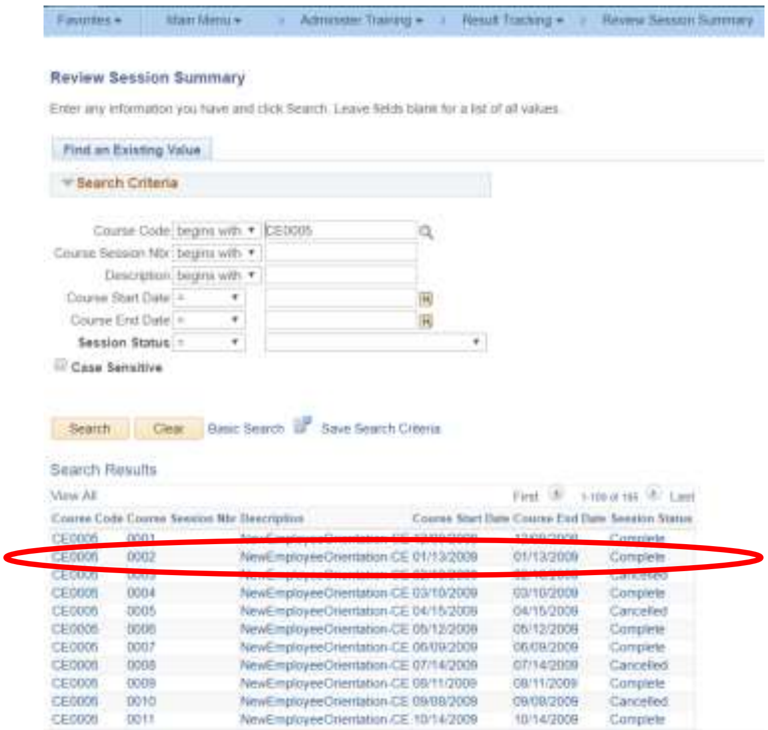
Step One: Navigate to the "Review Session Summary" Page

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

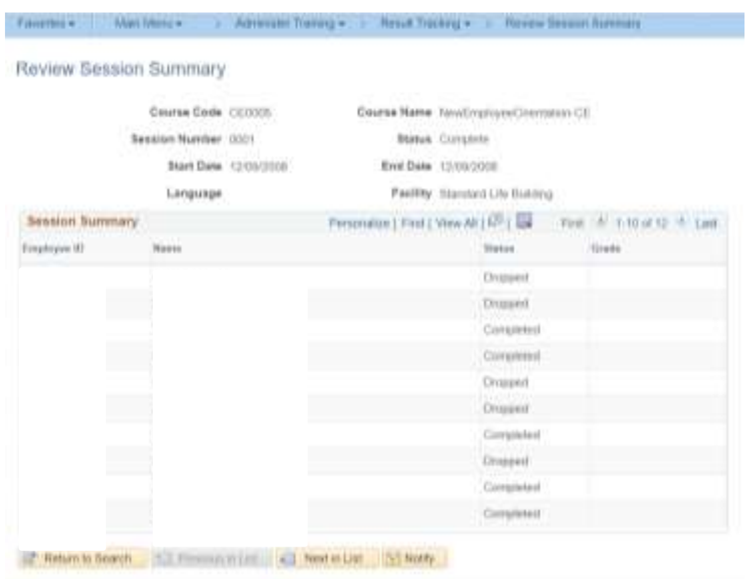
Step Two: Search Course Code. Enter "Search"



Step Three: Select the correct course session from the search results.



Step Four: Review Attendance Details for specific session by selecting "view all"



NOTE: The Review Session Summary table enables the Training Coordinator to see attendance status as view only. Attendance status cannot be changed using this table. To change attendance status, see Change Attendance Status in a Course Session

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.

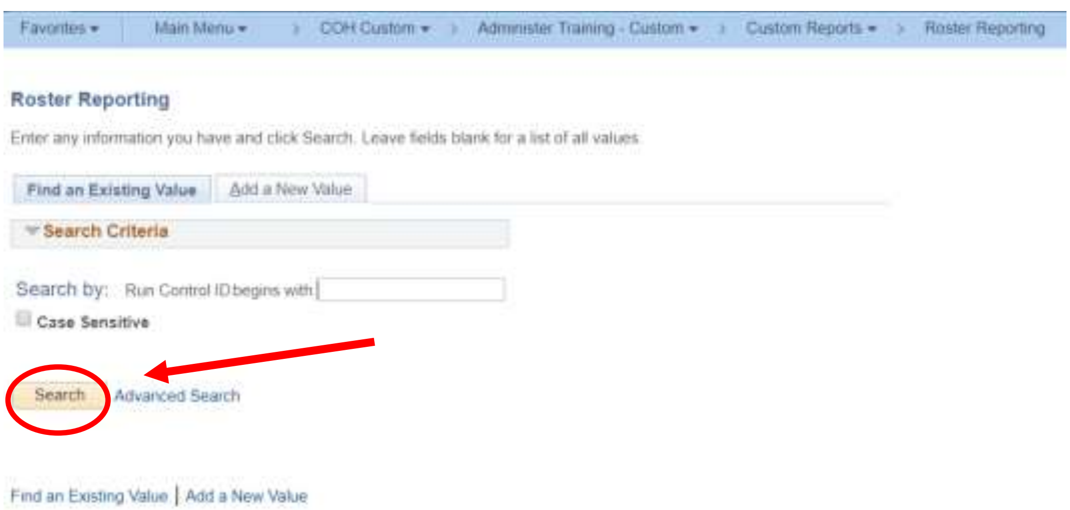
Process Overview:

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"



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.

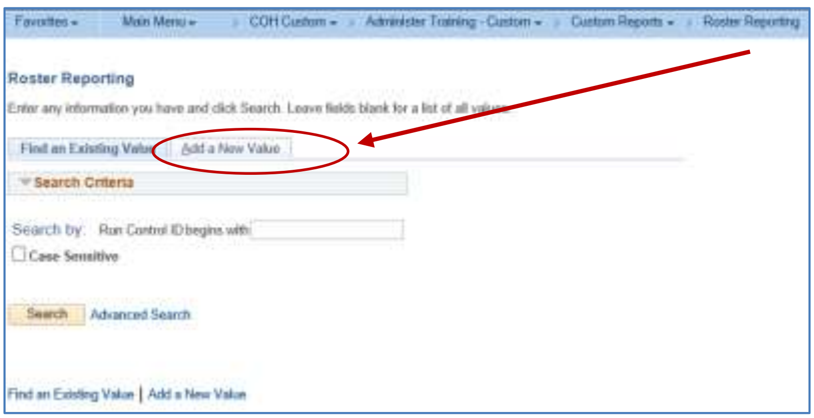
Step Three: Set up the Run Control (if you haven't before)

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:

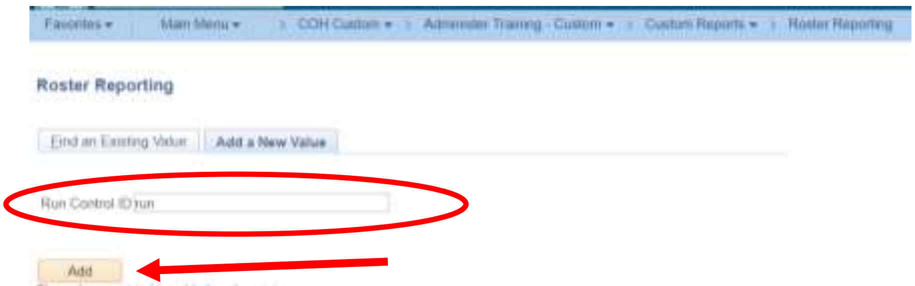
1. Navigate to the "Roster Reporting" Table

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

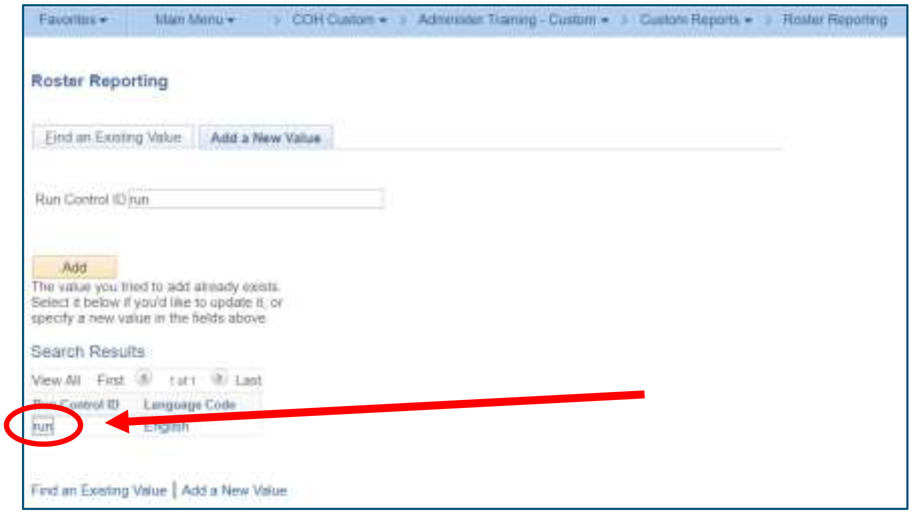
2. Click on the "Add a New Value" tab to create a run control.



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



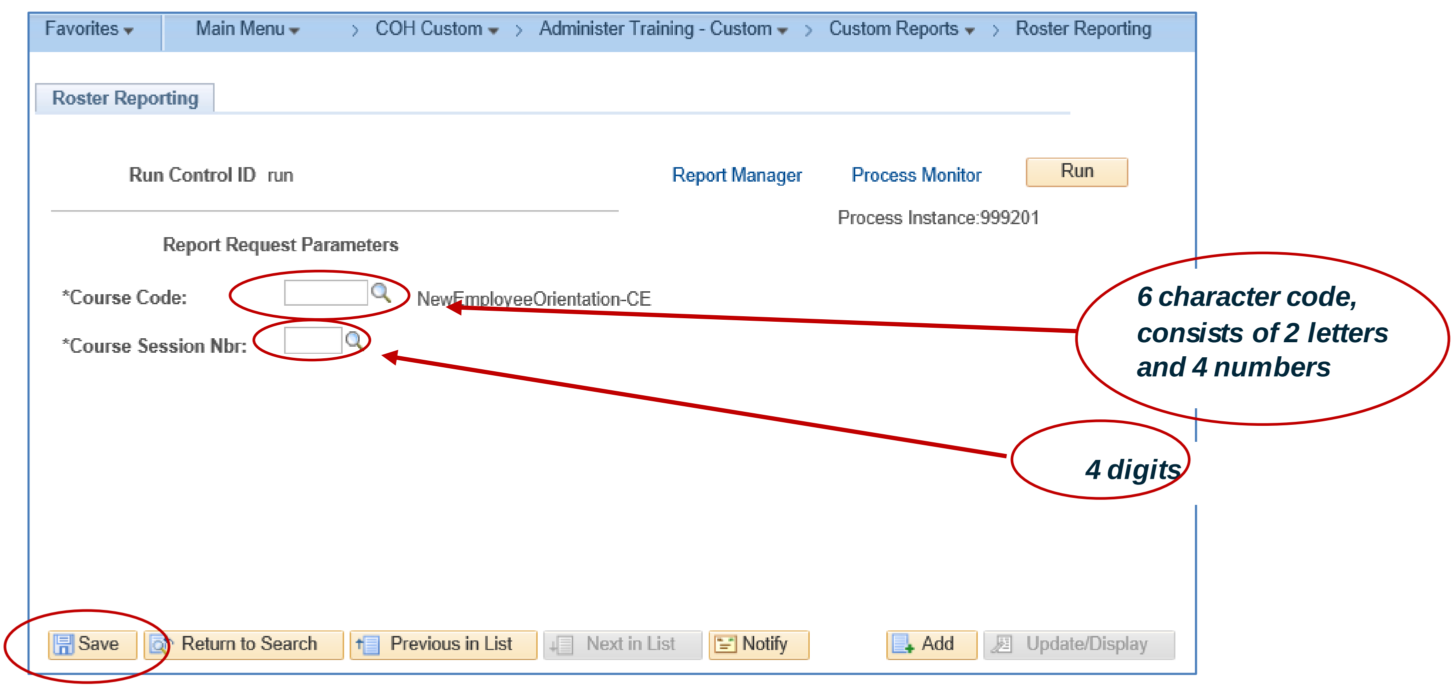
4. When search results for the run control appear, click on “run”



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.

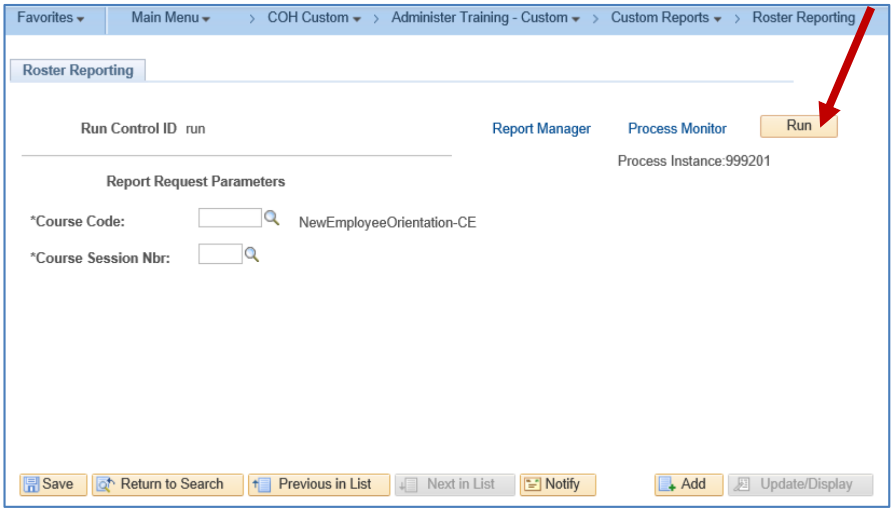
Step Four: Enter the six-digit course code and the four-digit session number for the course you want to run a Course Session Summary report for.



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

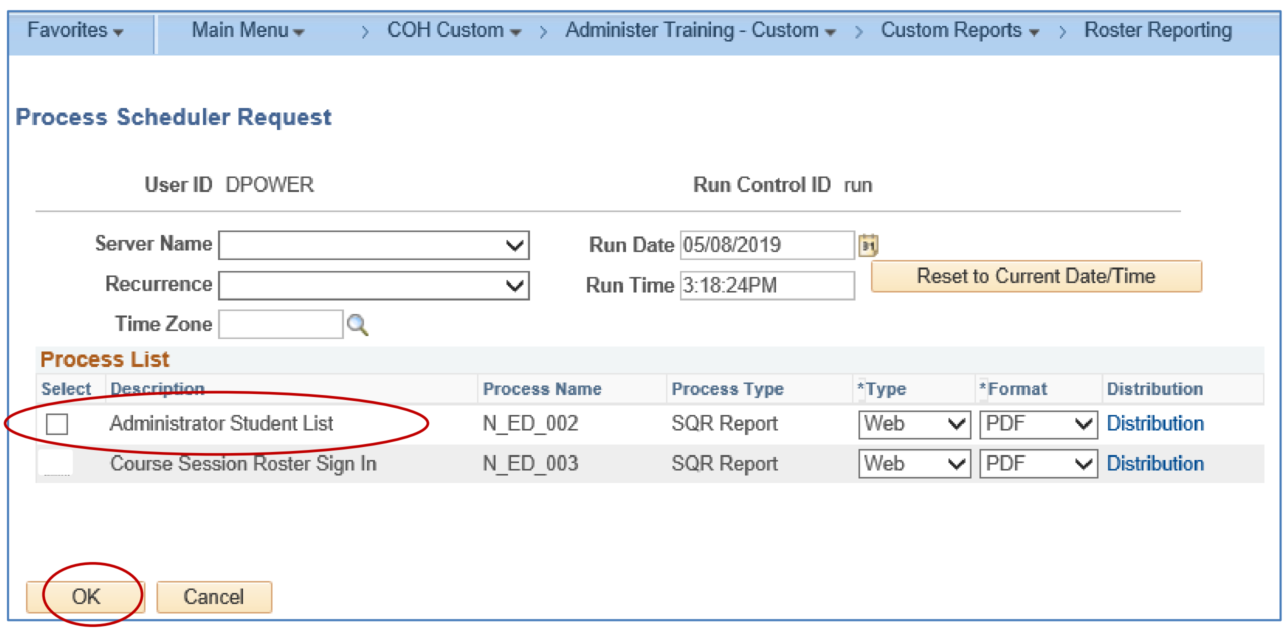
Step Five: Press Save to save the run control feature for future use.

Step Six: Click the "Run" button



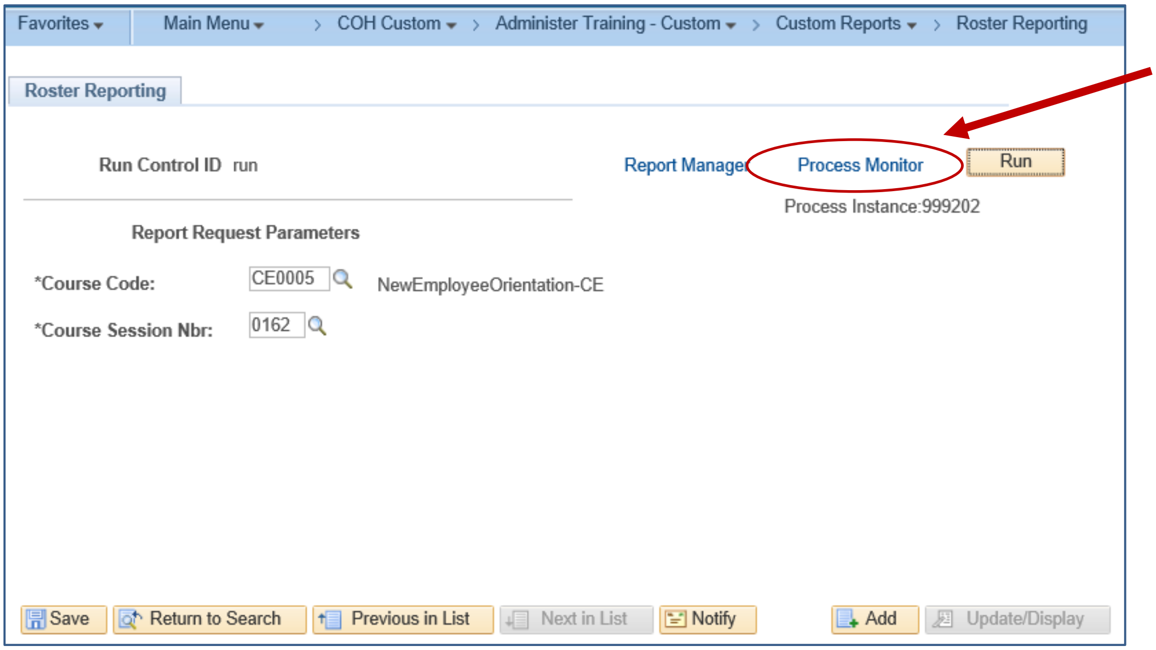
The Process Schedule Request page will appear.

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

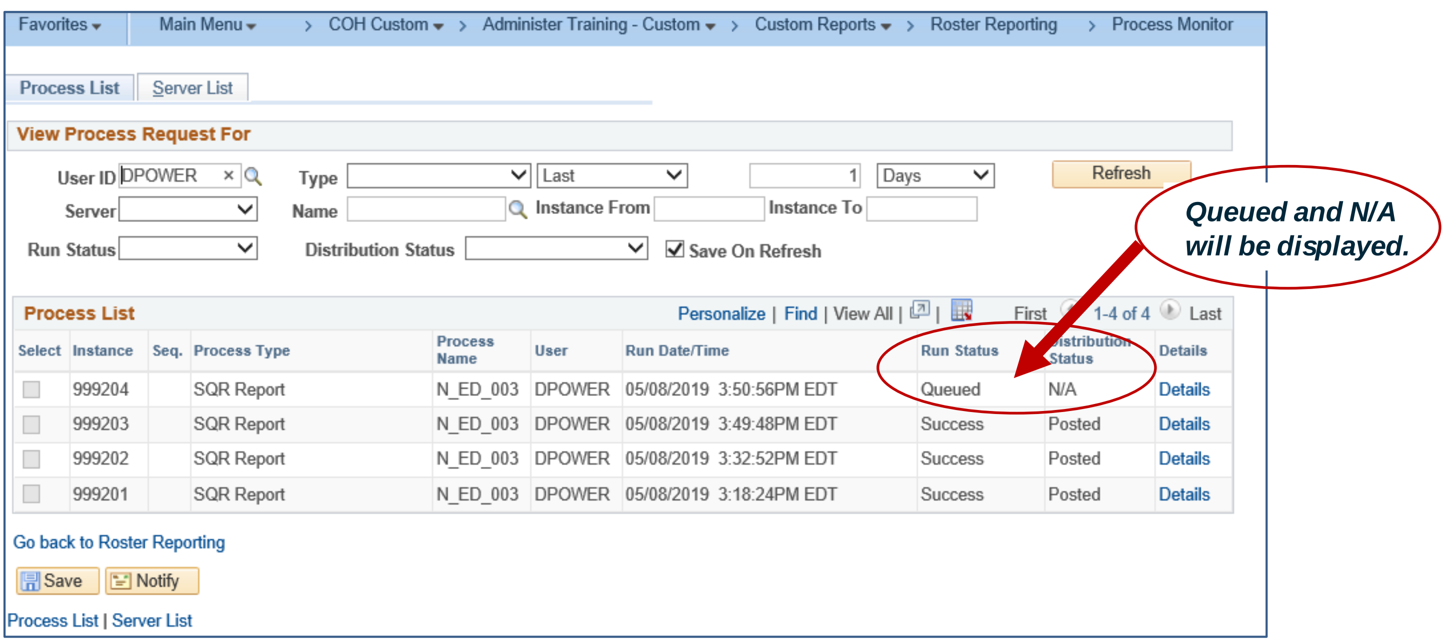


Step Eight: Click "OK". You will be brought back to the 'Roster Reporting' Run Control ID page.

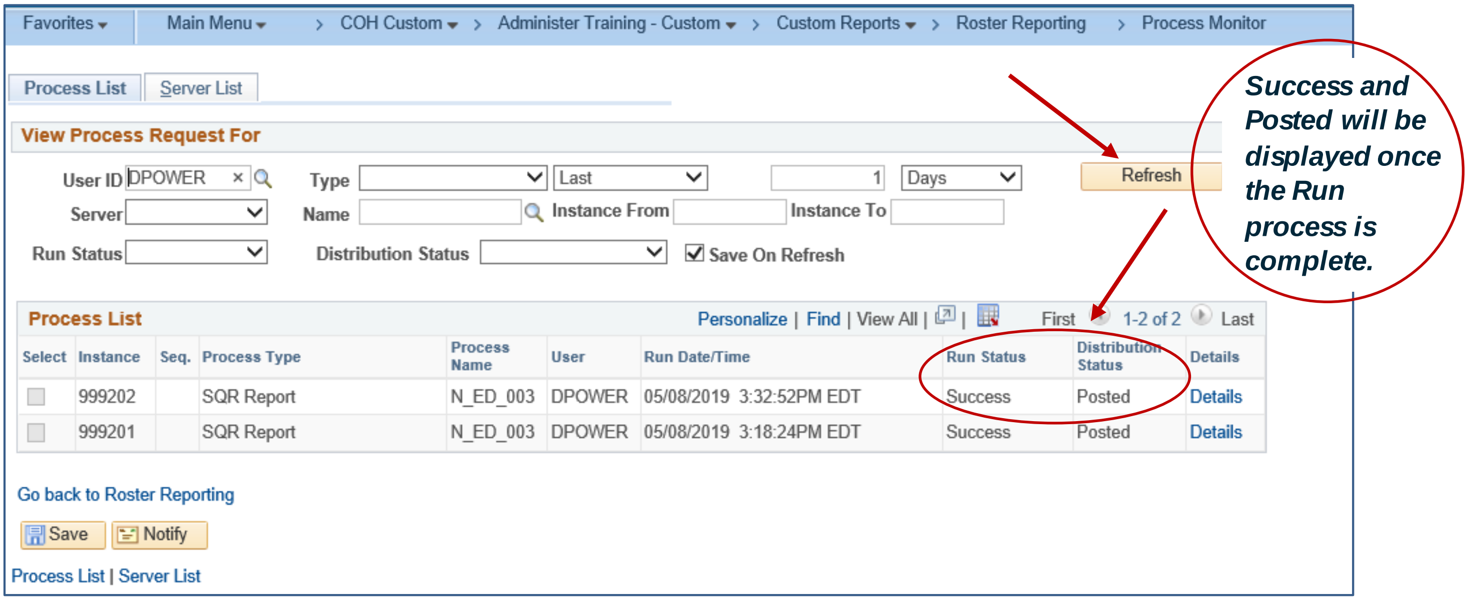
Step Nine: Click "Process Monitor."



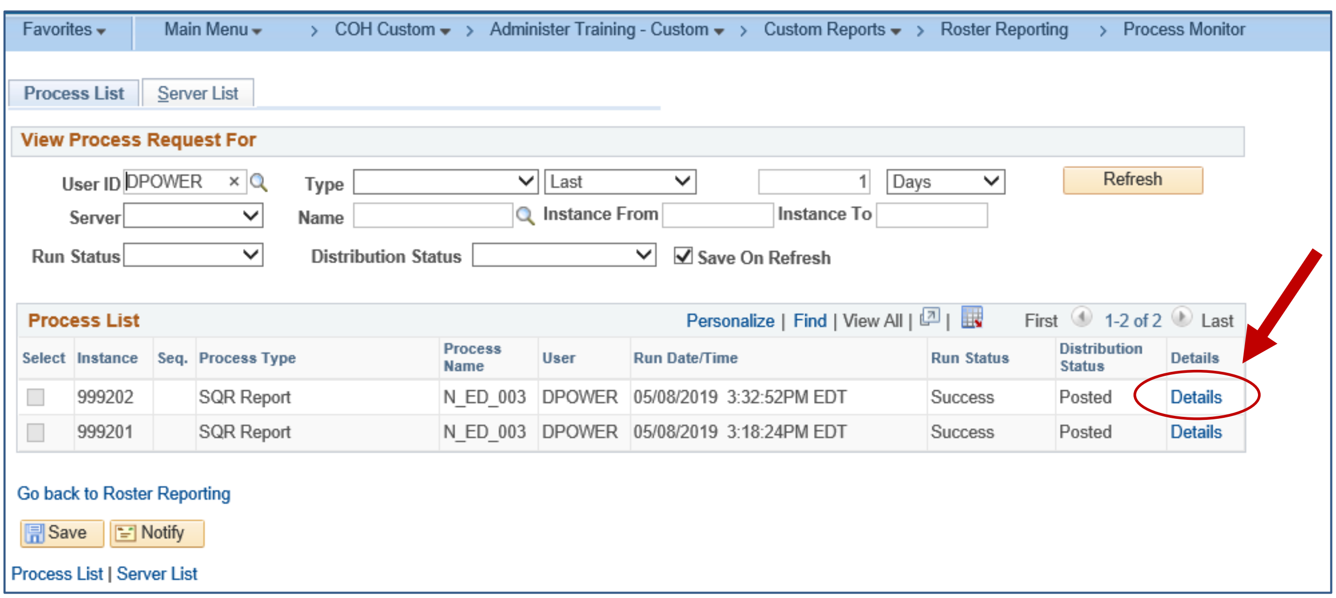
Once you click "Process Monitor", the Process List Page will appear. The 'Run Status' and 'Distribution Status' will appear as Queued and N/A.



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

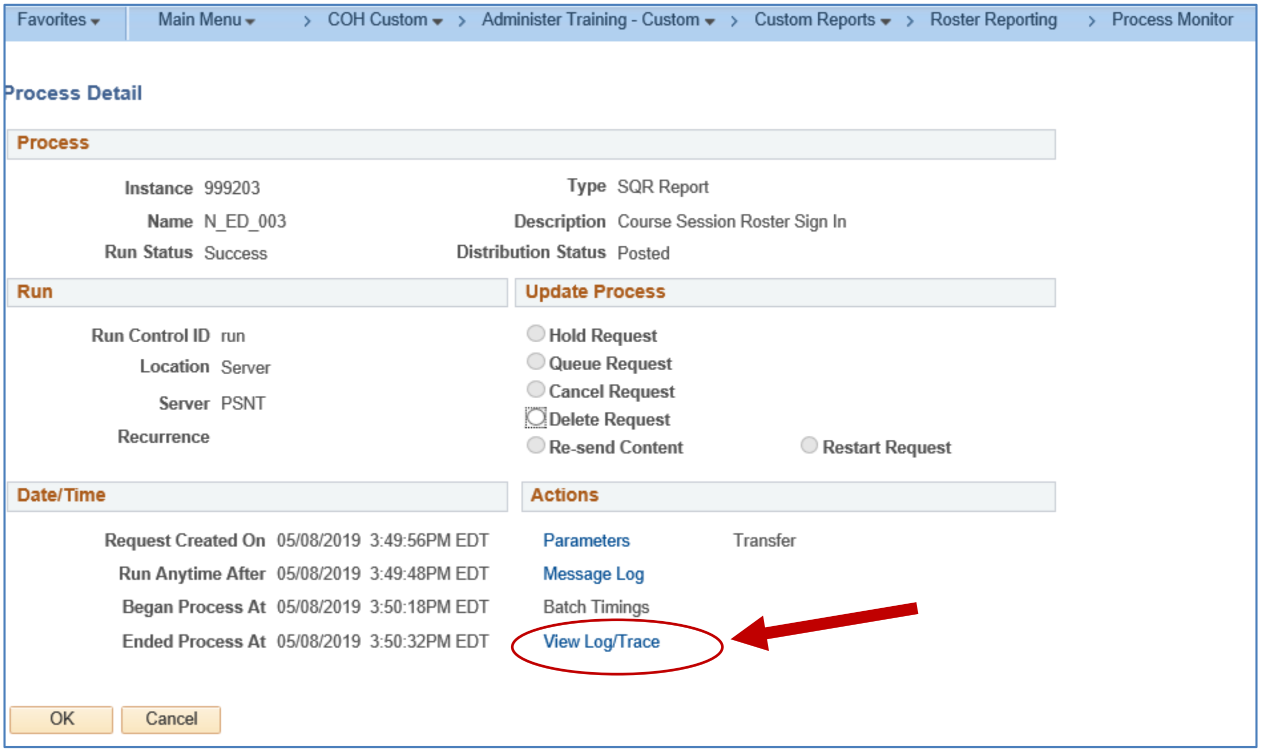


Step Eleven: Click on “Details” beside the report that you want to run



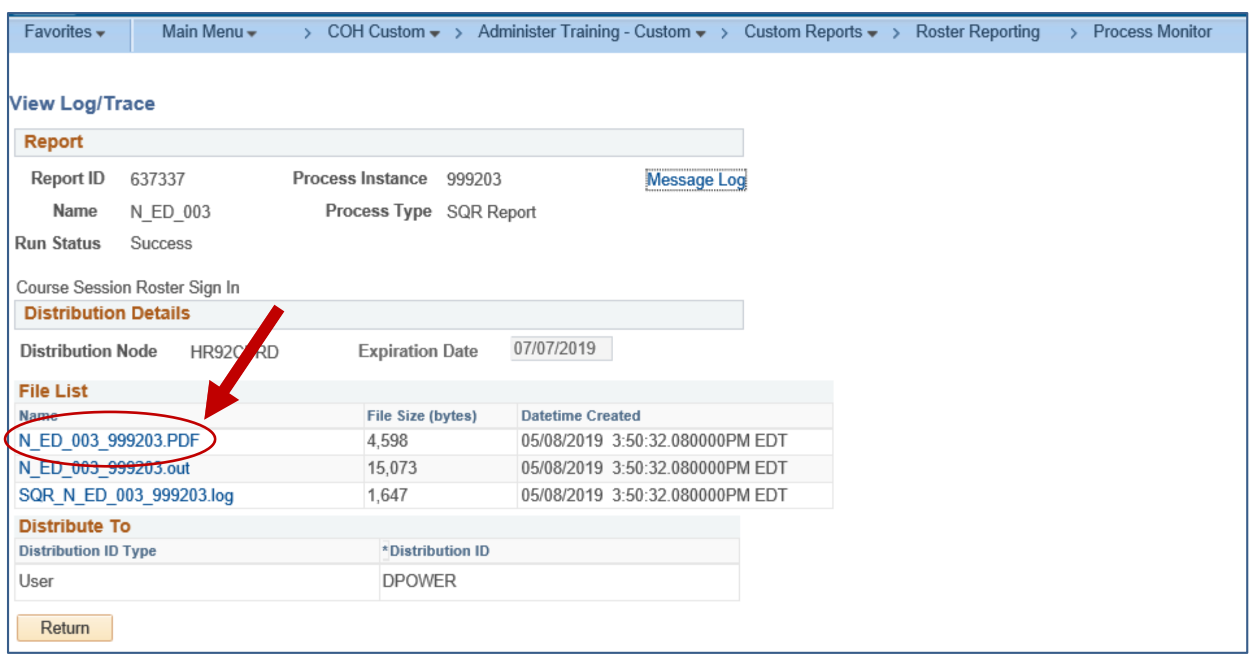
The “Process Detail” Page will appear

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

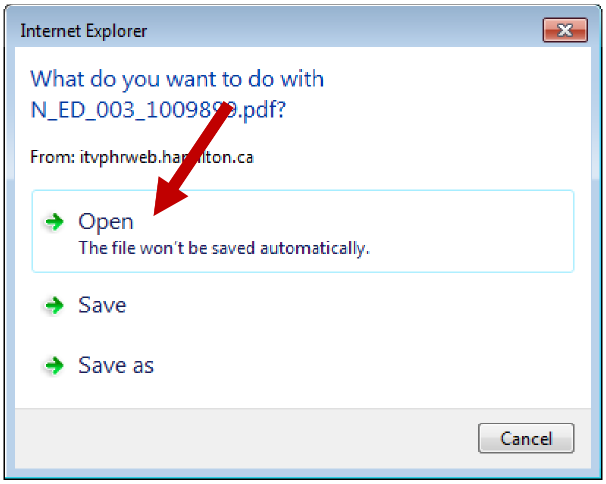


The "View Log/Trace" Page will appear

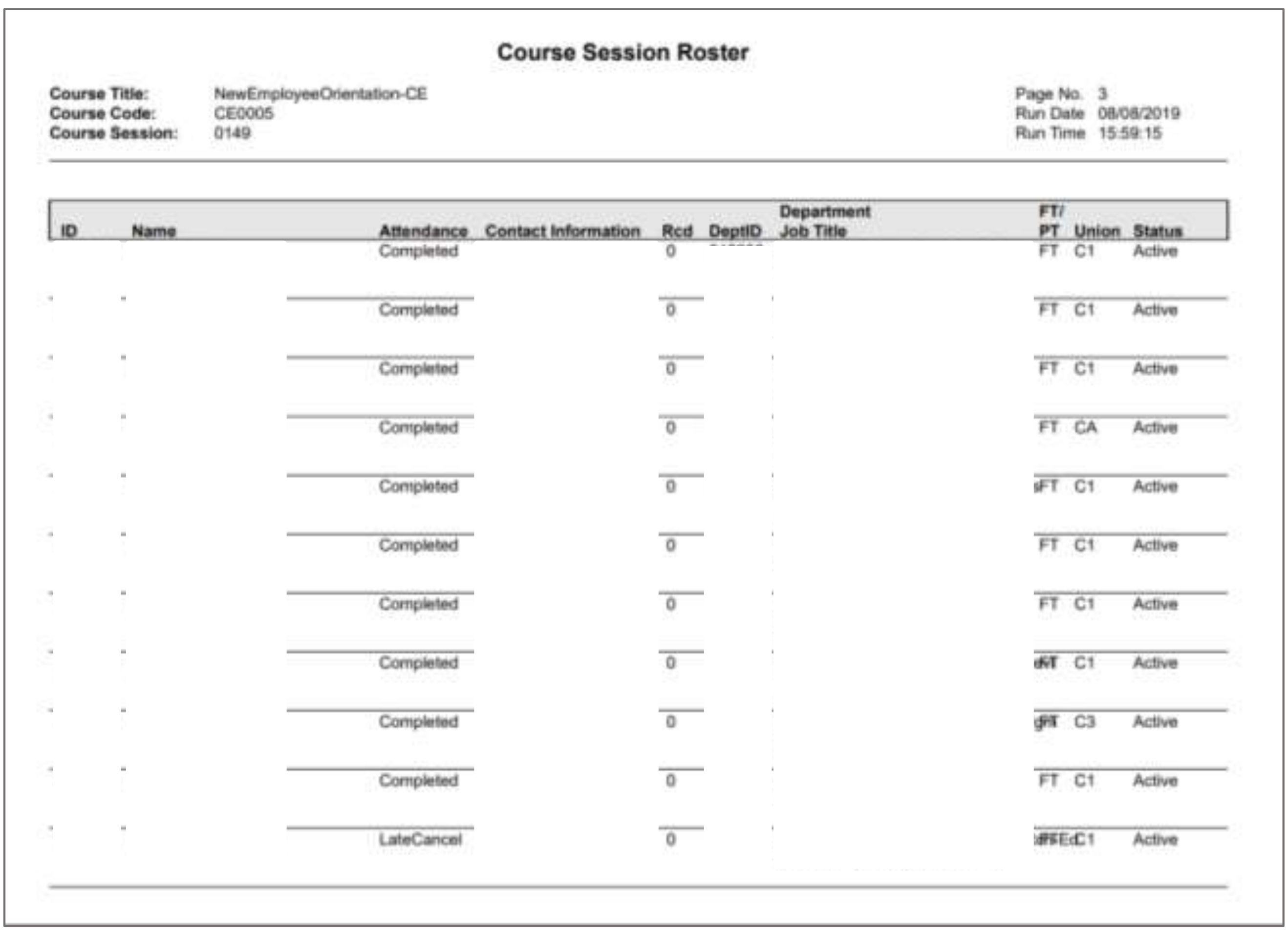
Step Thirteen: Under File List, Select the PDF file.



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	C3	Active
		Completed		0			FT	C1	Active
		LateCancel		0			[illegible]	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.

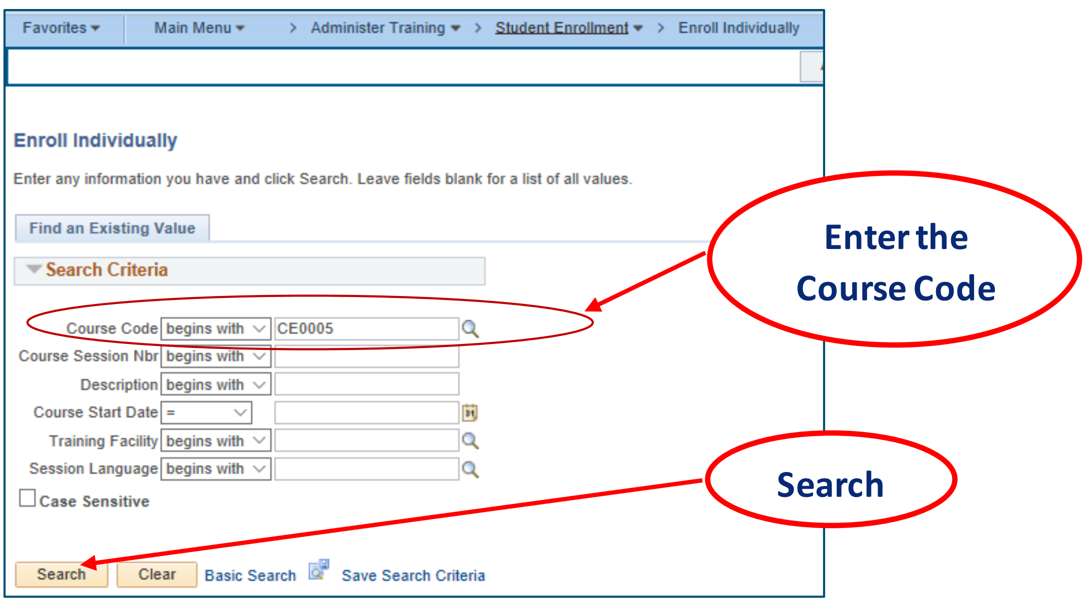
To view a full list of attendance statuses and definitions, see Appendix D: Attendance Status

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.

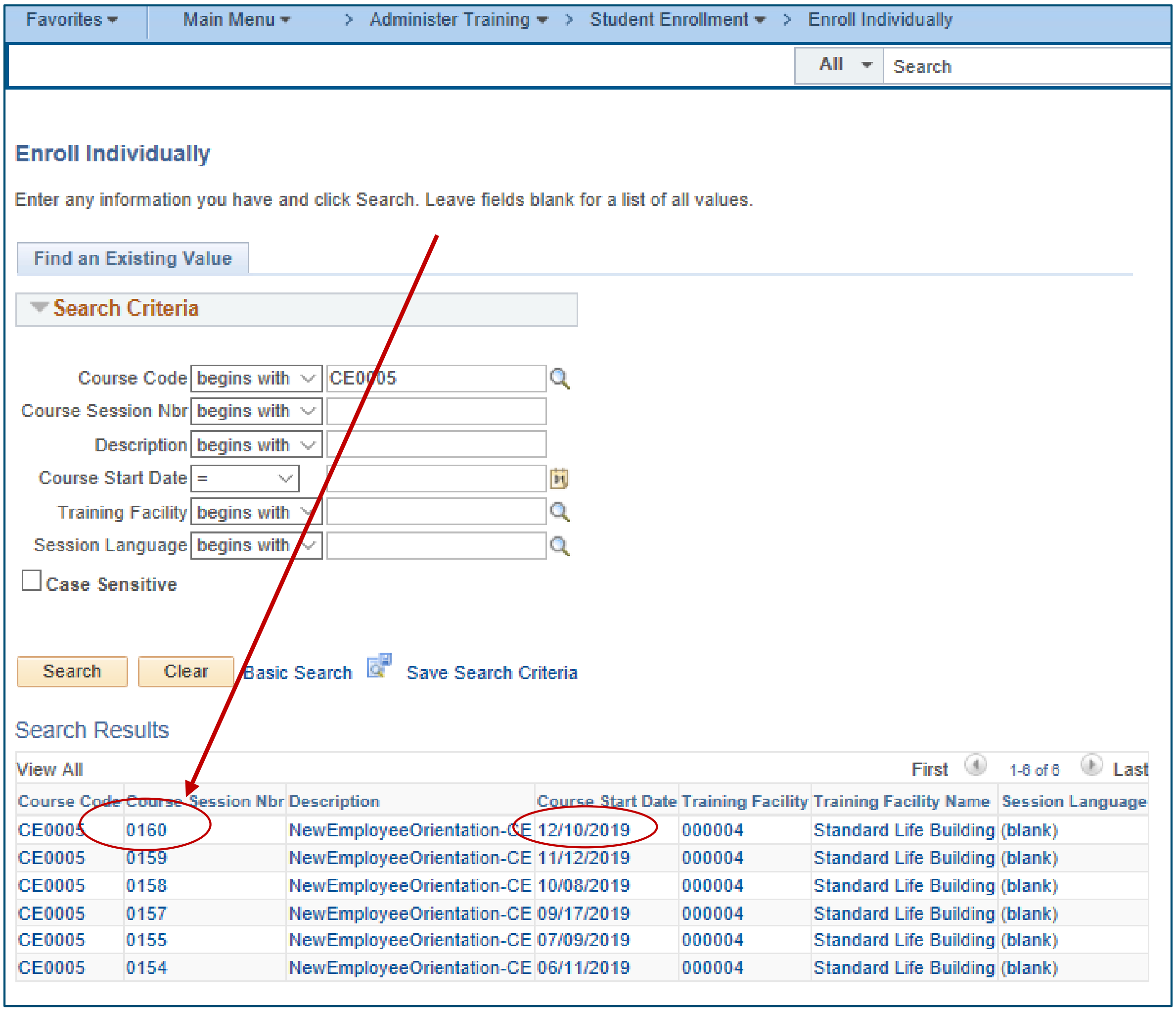
Step One: Find the Course associated with the change in attendance status

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.**



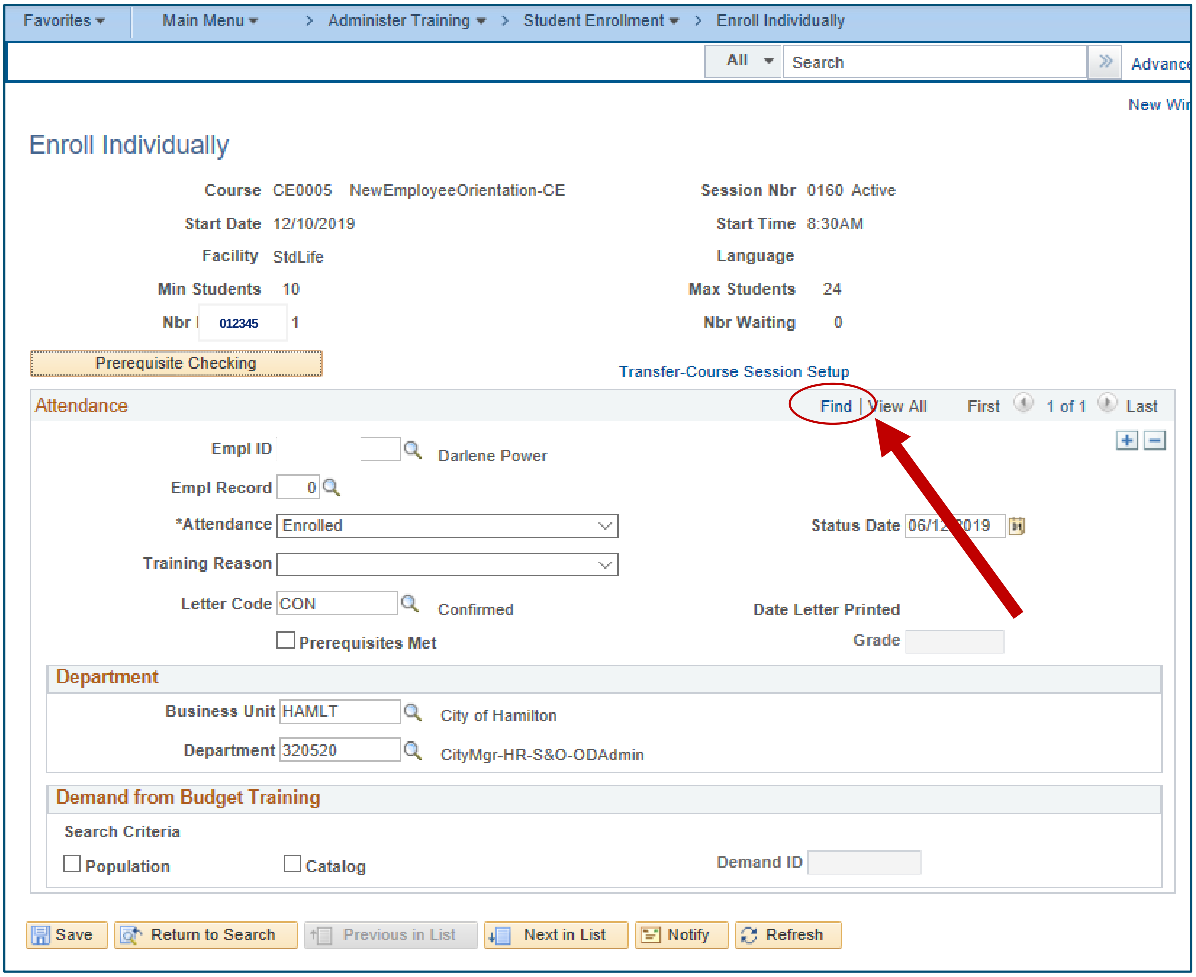
Step Two: When the "Enrol Individually" page appears, click on the Course Session number that corresponds to the correct date of the session of which you want to change the employee's attendance status.

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

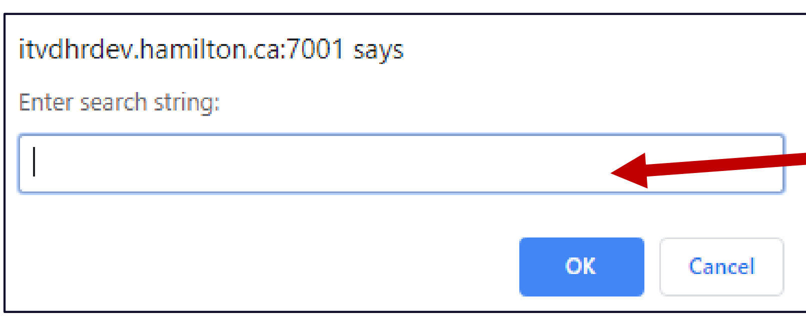


The course session Enrollment Page will appear.

Step Three: Click Find.



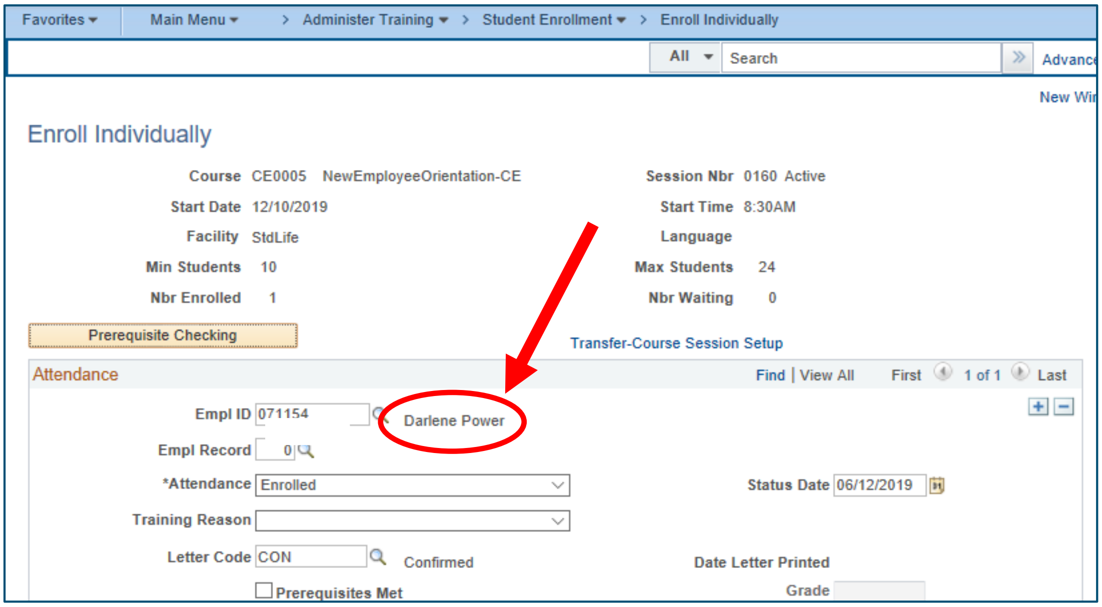
Step Four: When search box appears, type the name of the employee that you want to change the attendance status for.



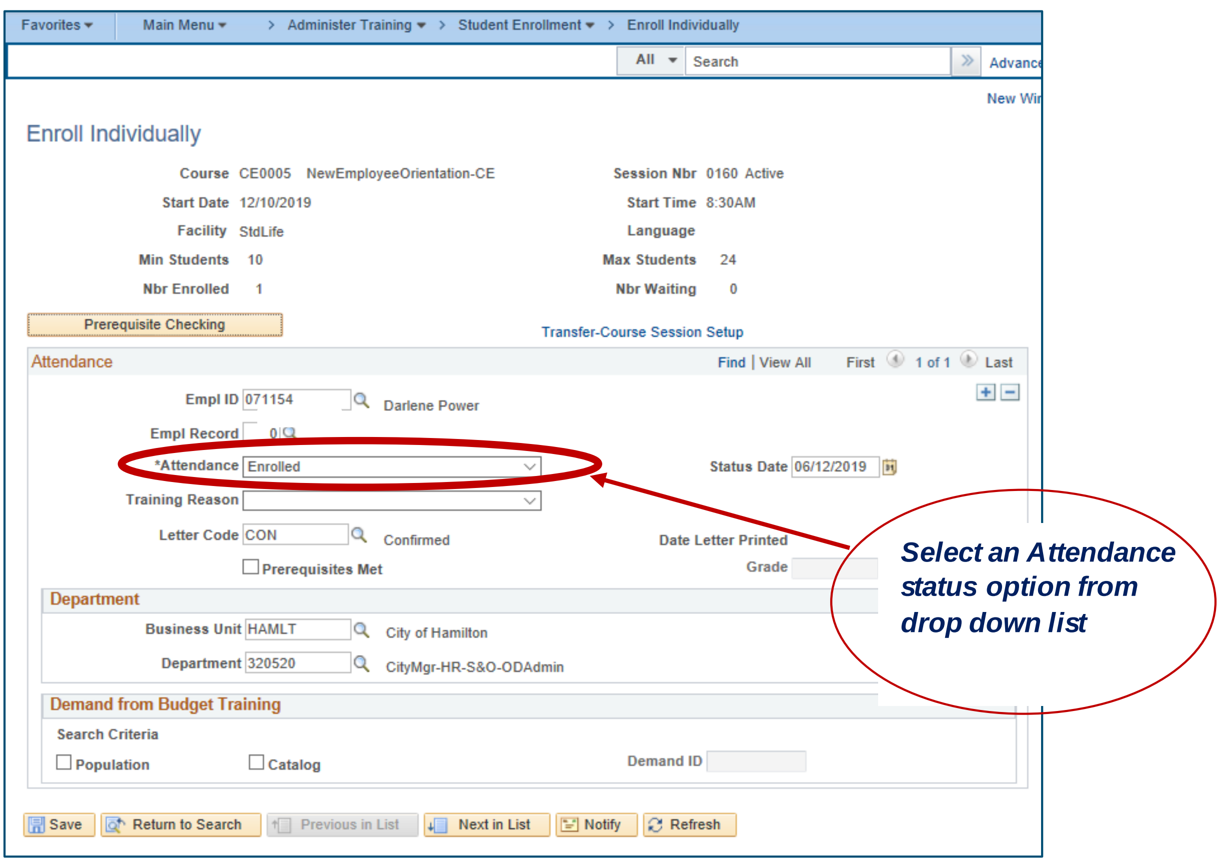
Type last name or full name of the employee, if there are numerous enrollments.

Click OK to search for name.

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



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



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)

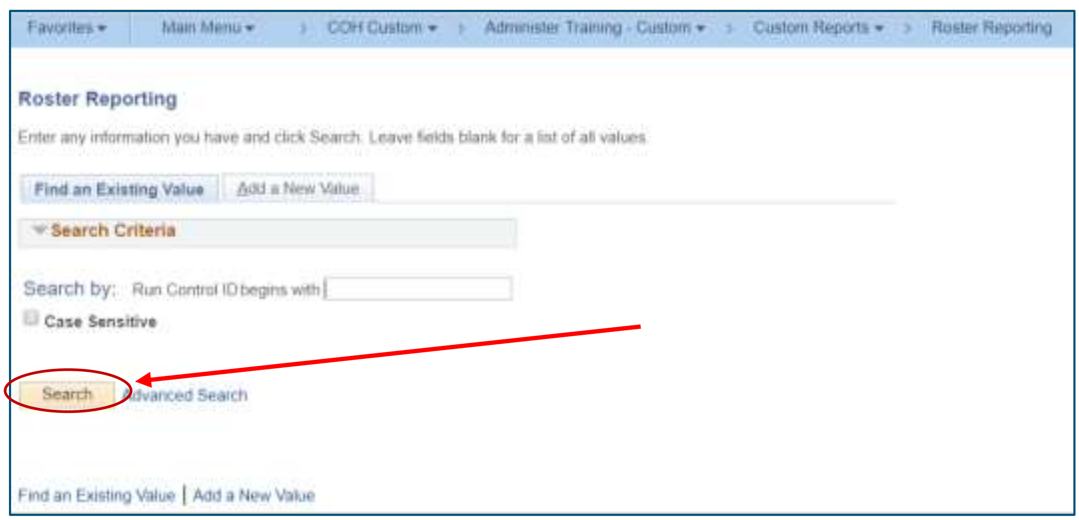
Process Overview:

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)

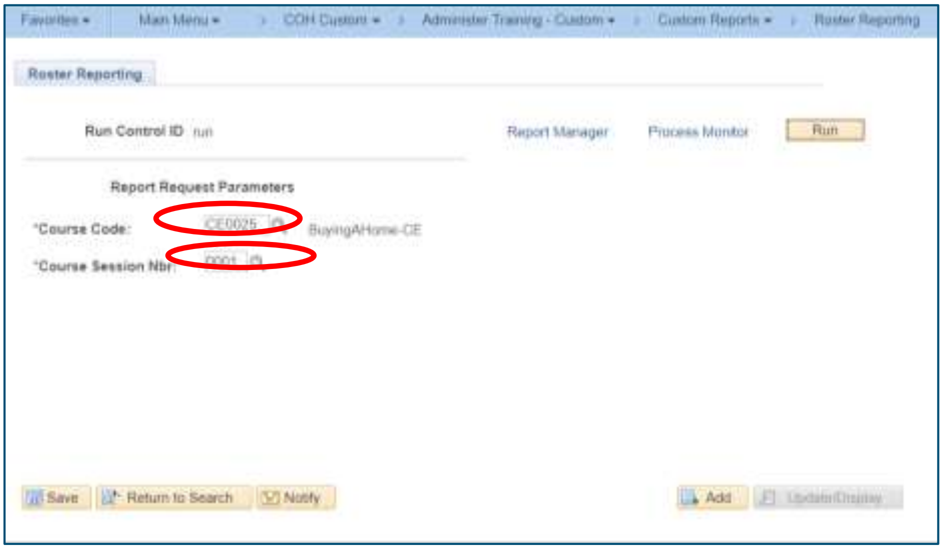
Step One: Navigate to Roster Reporting

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

Step Two: Click on "Search"

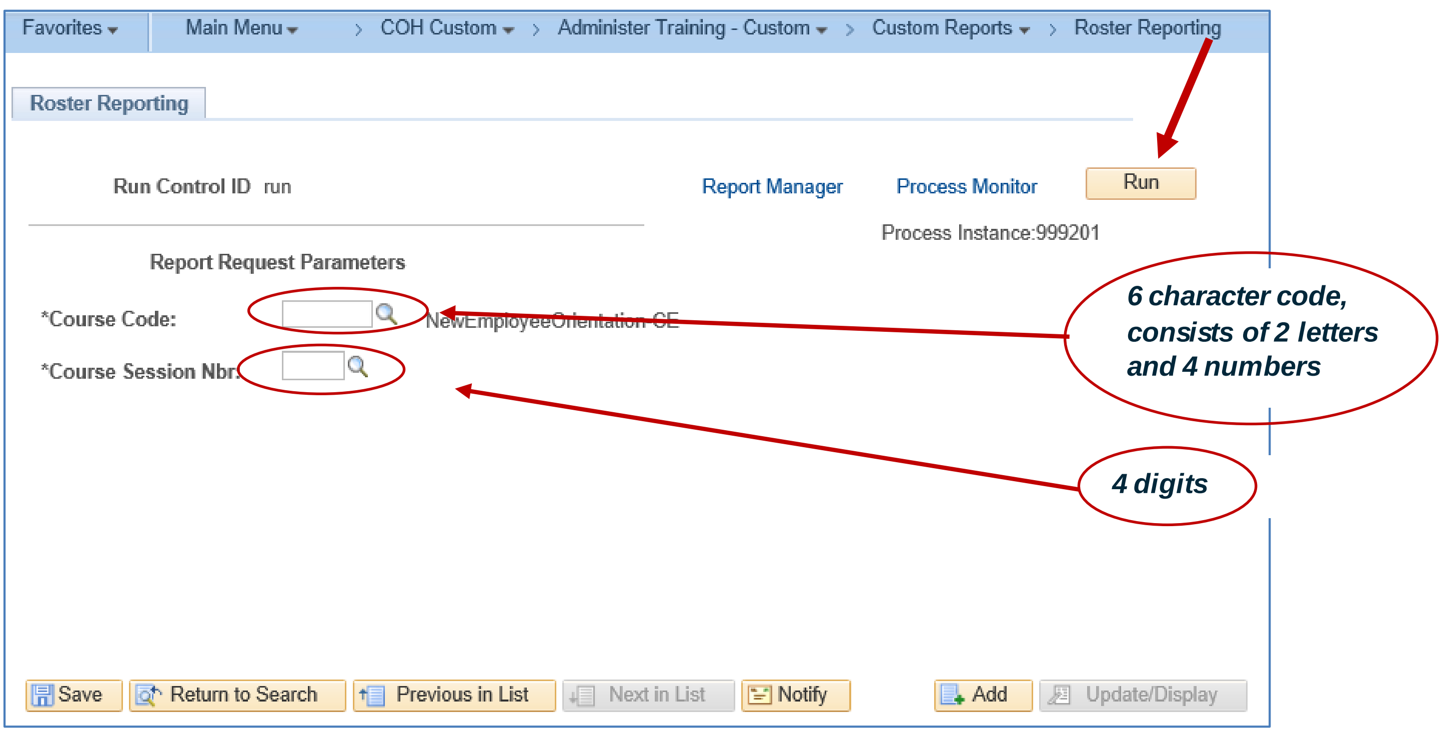


Once Search is selected, a new table will appear:



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.

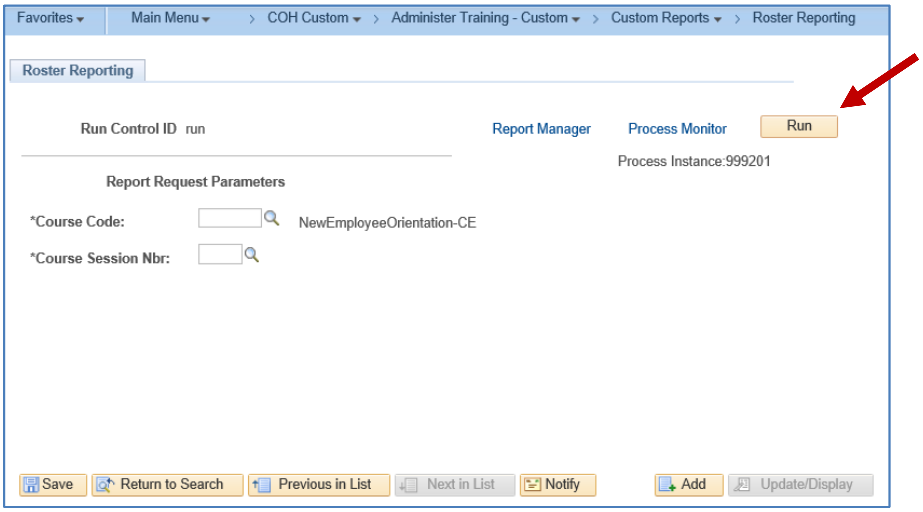
Step Three: Enter the six-digit course code and the four-digit session number for the course you want to run an attendance sheet for.



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

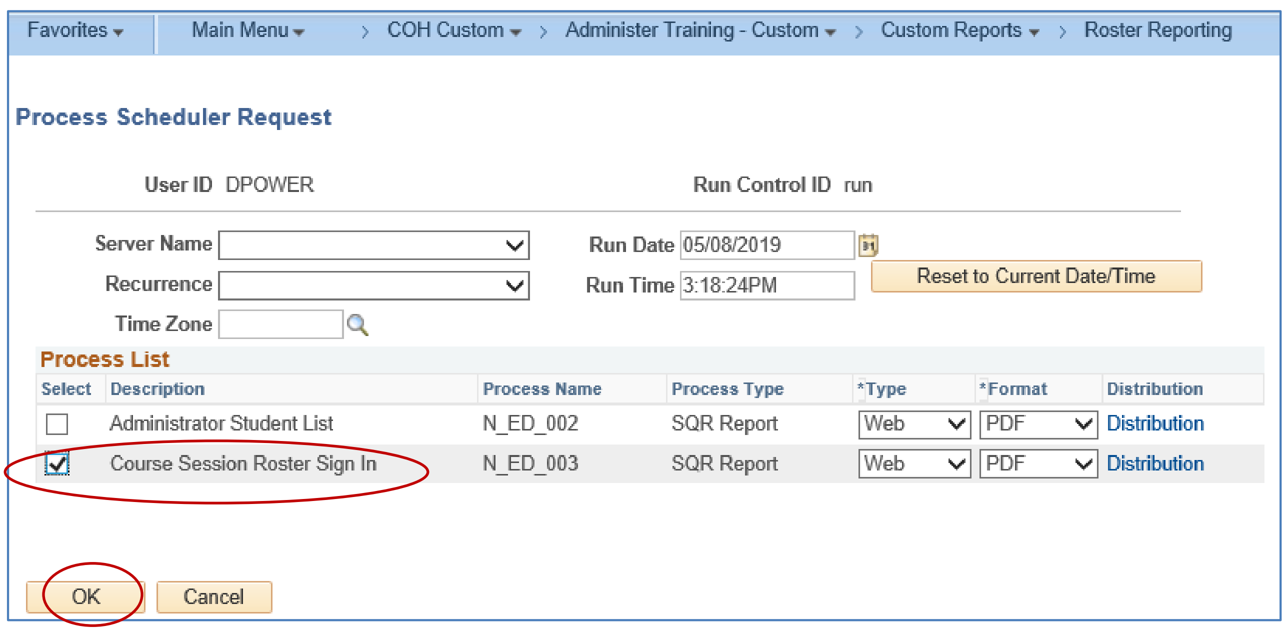
Step Four: Press Save to save the run control feature for future use.

Step Five: Click the "Run" button



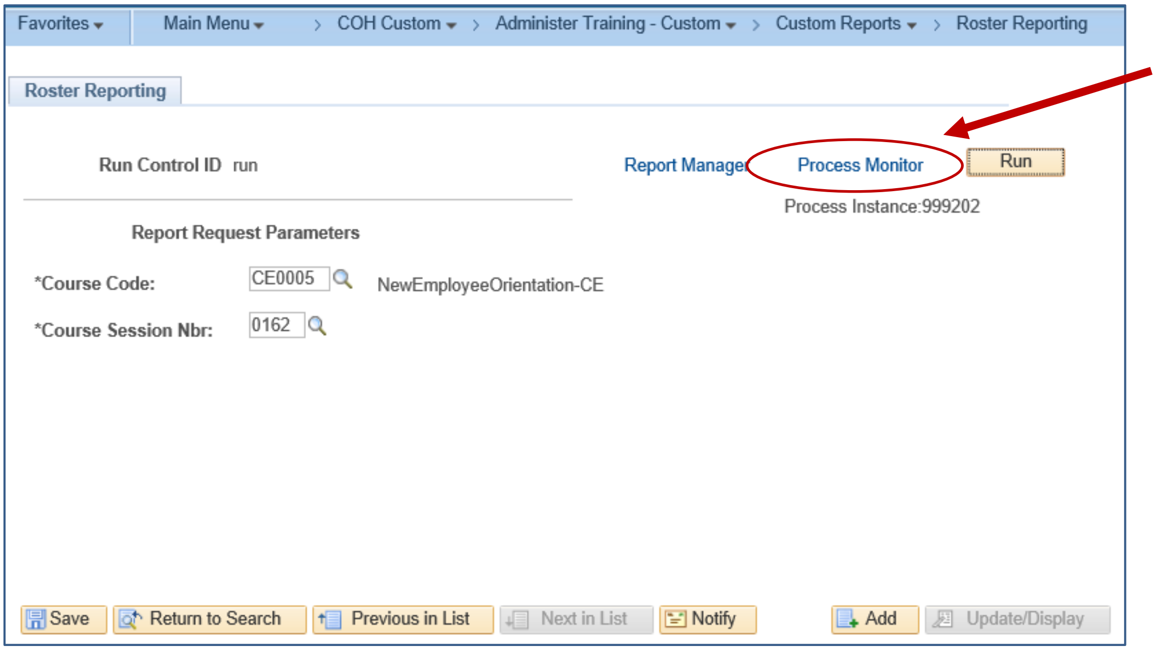
The Process Schedule Request page will appear.

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

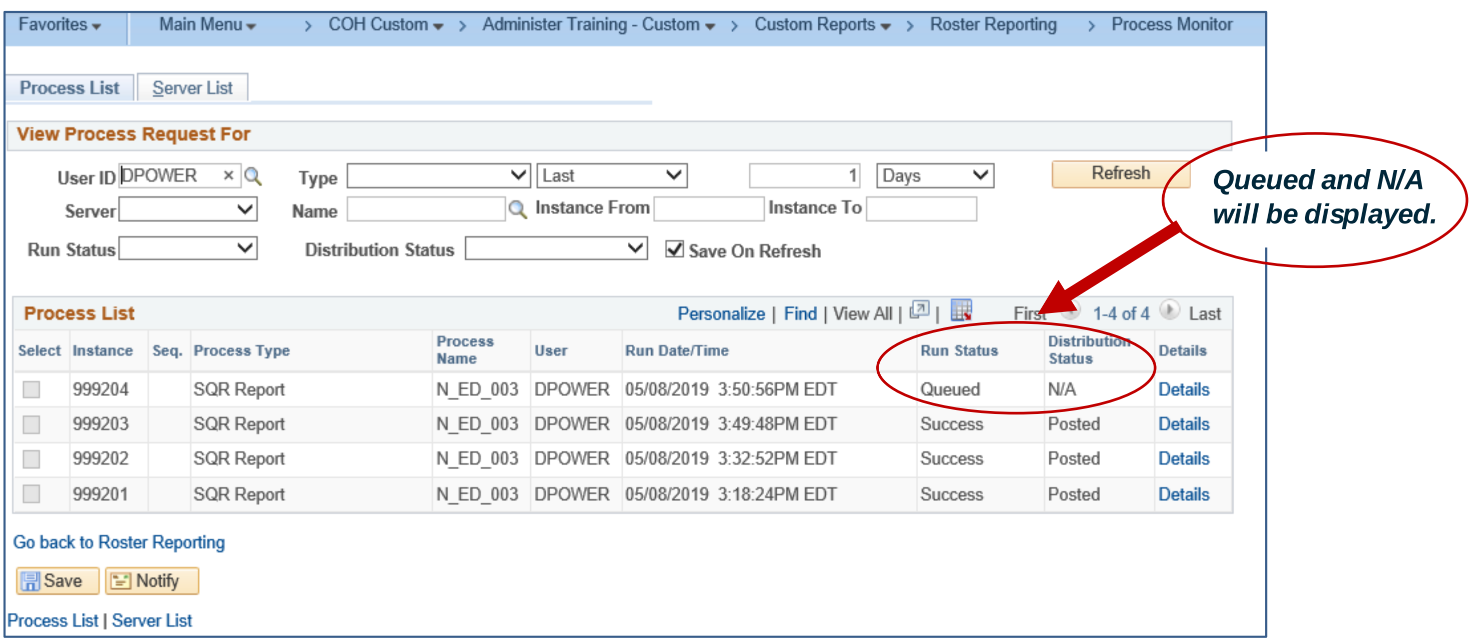


When you click "OK", you will be brought back to the 'Roster Reporting' Run Control ID page.

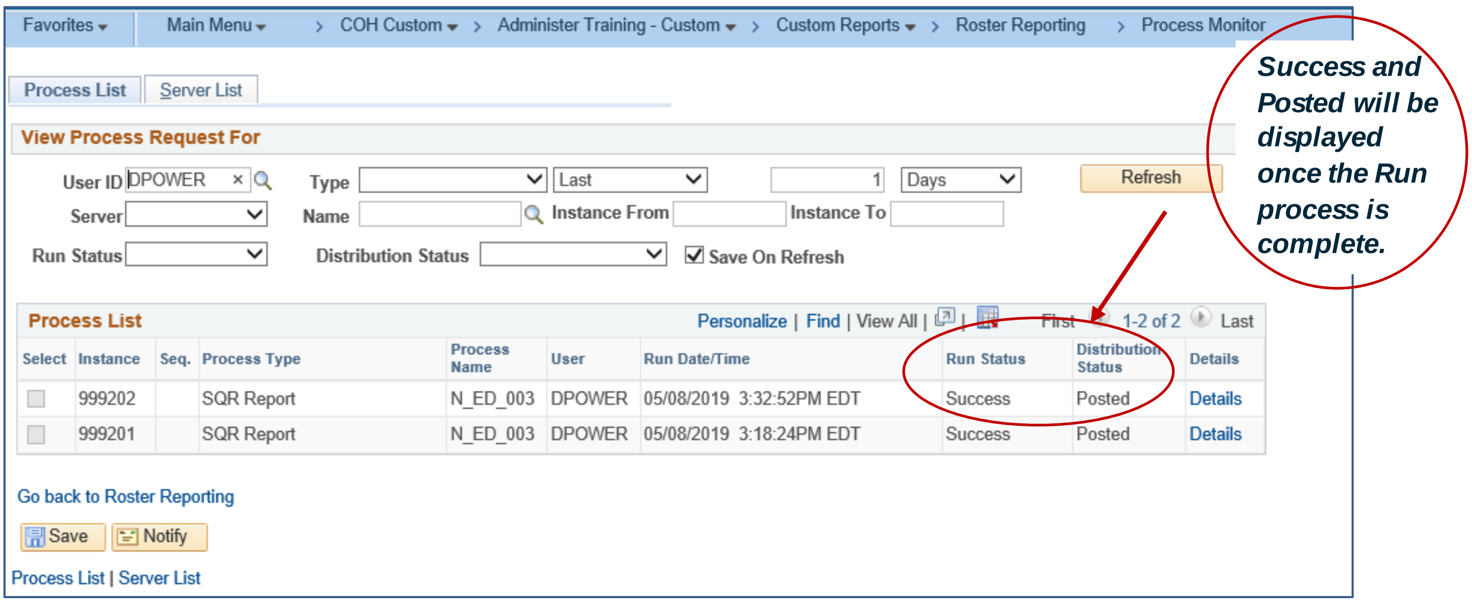
Step Seven: Click “Process Monitor.”



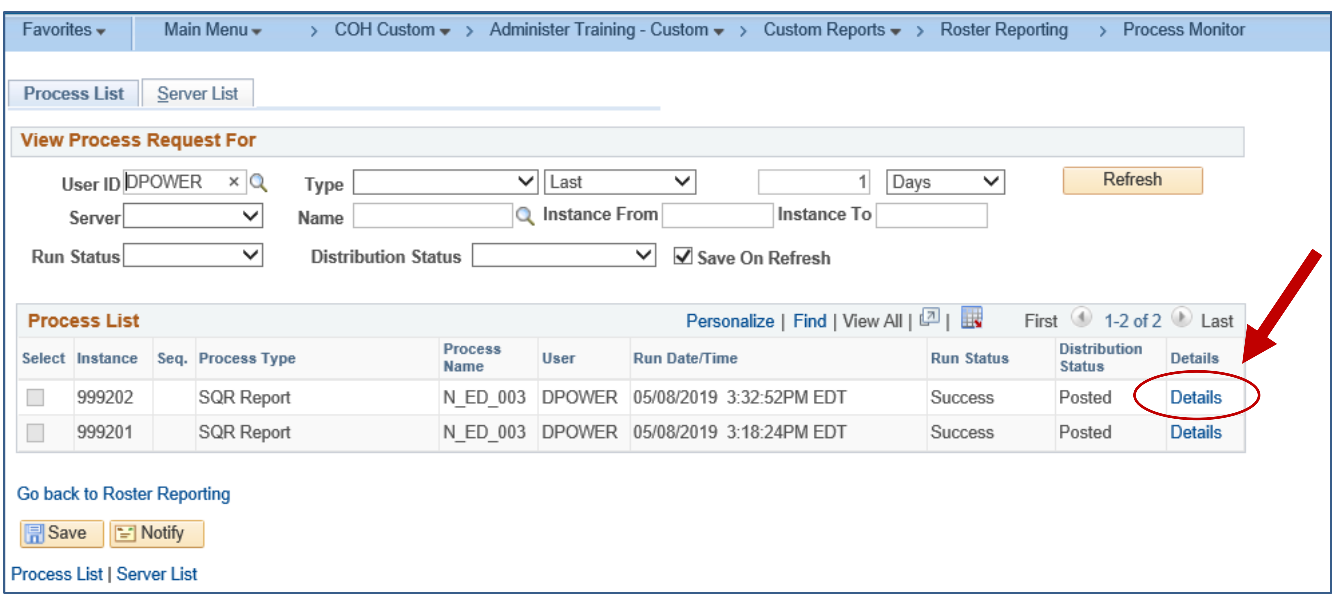
Once you click “Process Monitor”, the Process List Page will appear. The **‘Run Status’ and ‘Distribution Status’ will appear as Queued and N/A.**



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

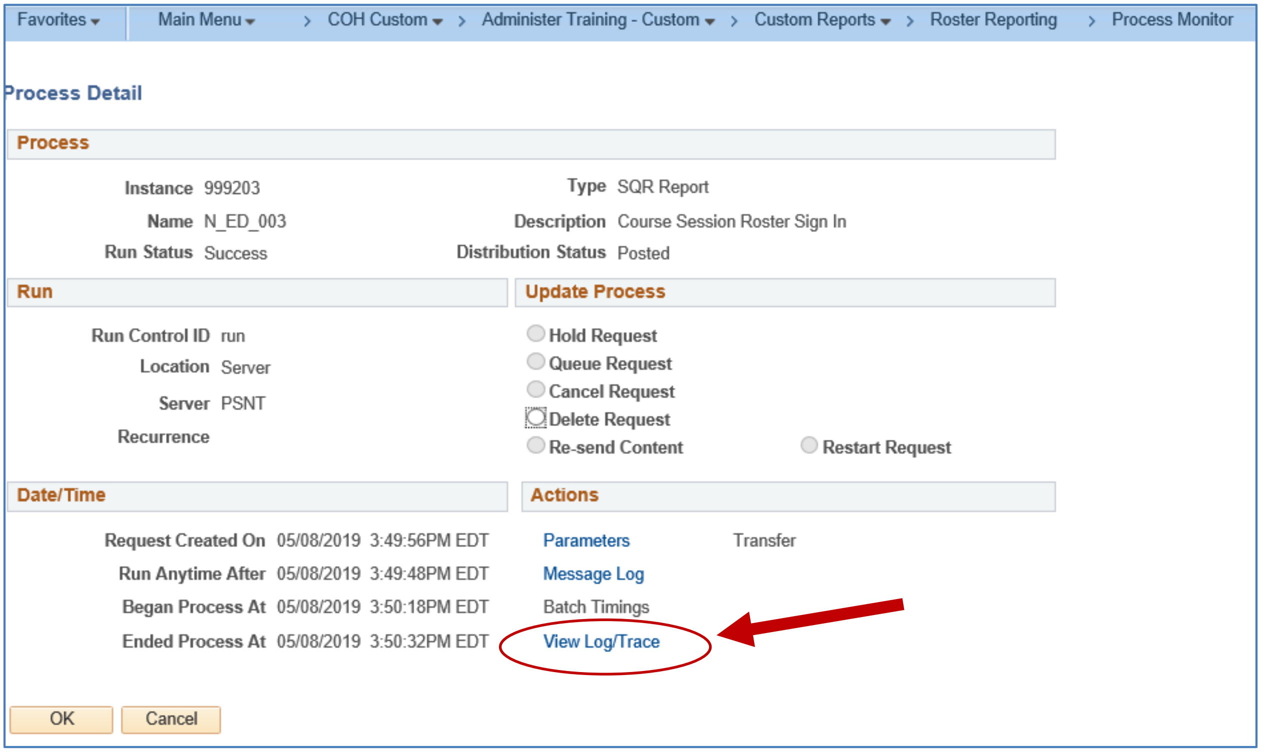


Step Nine: Click on “Details” beside the report that you want to run



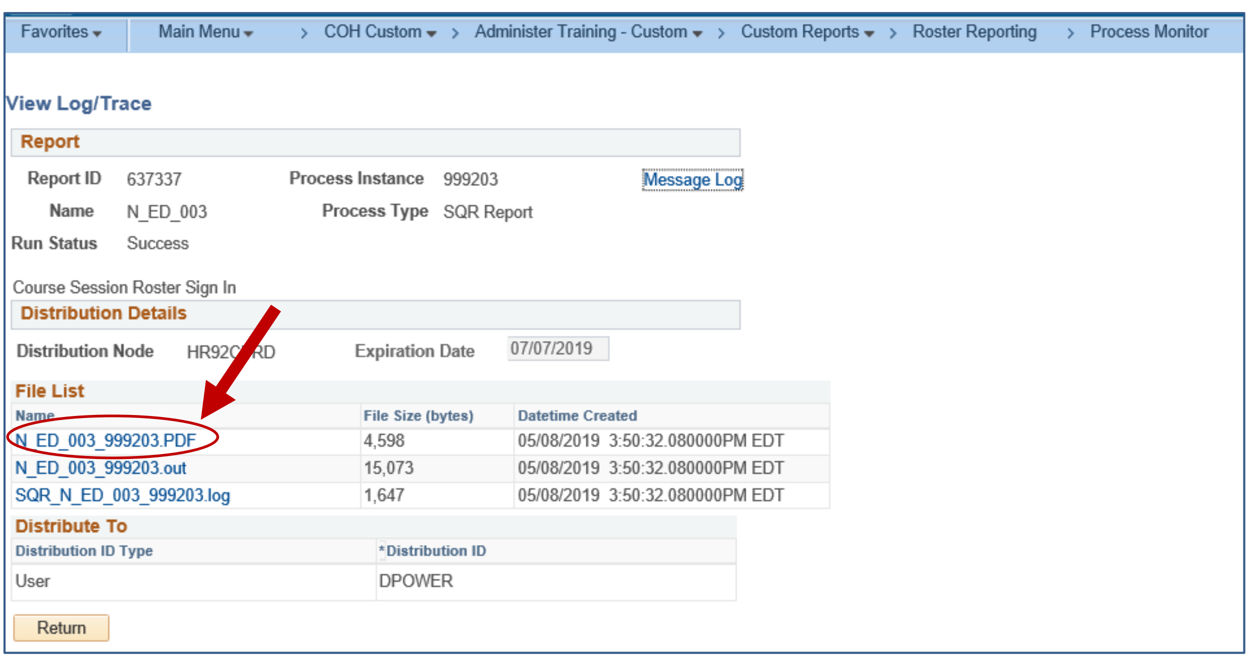
The “Process Detail” Page will appear

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

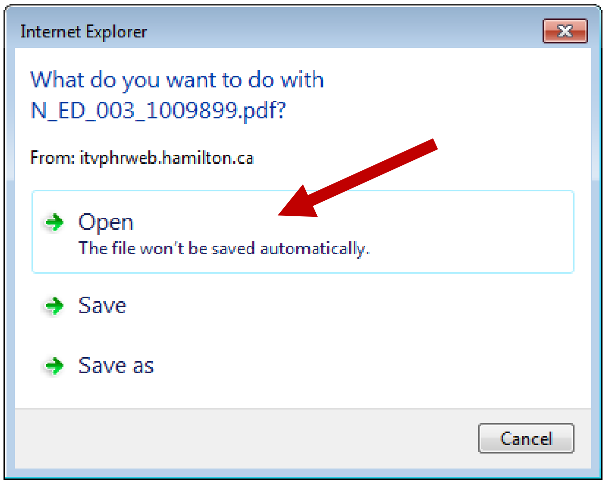


The “View Log/Trace” Page will appear

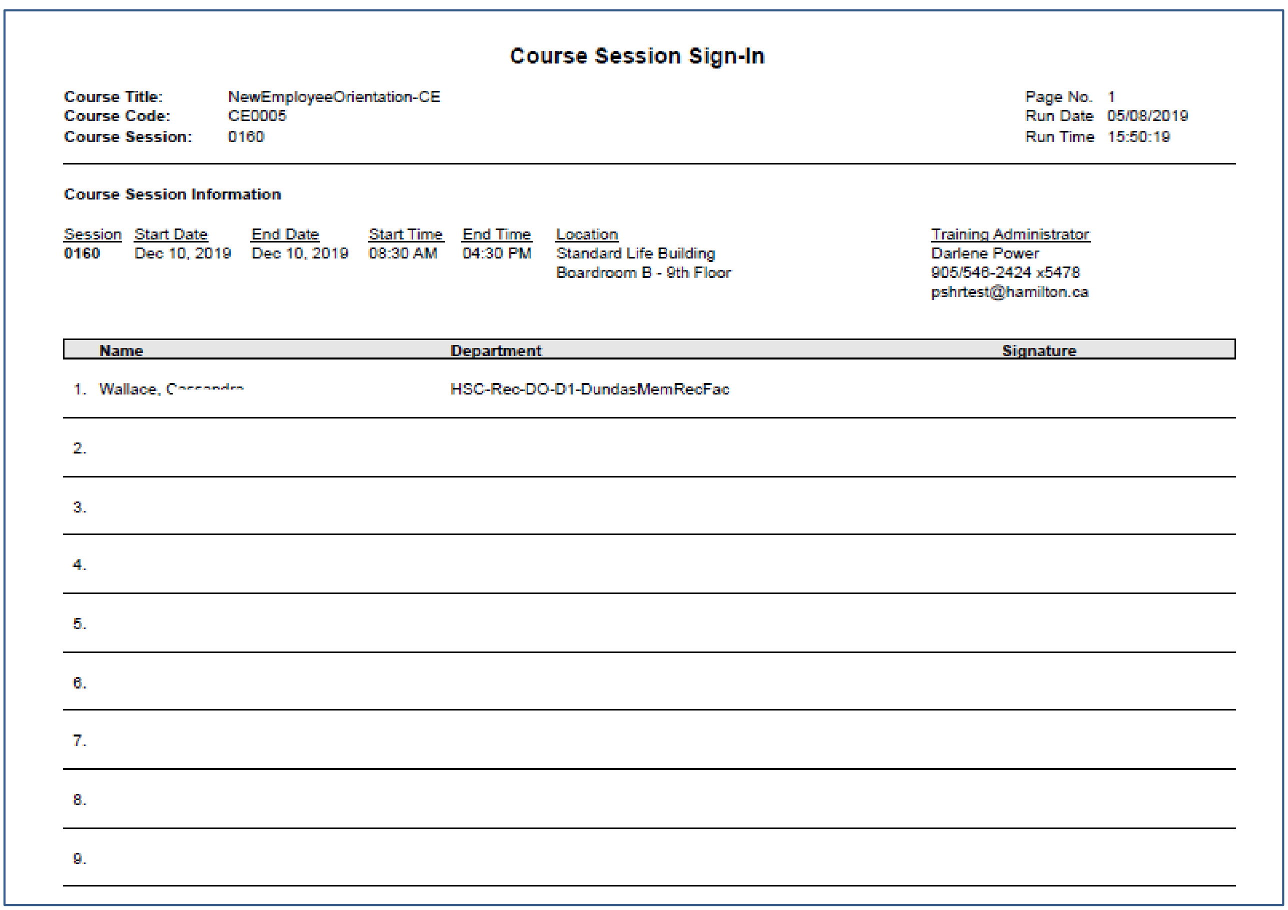
Step Eleven: Under File List, Select the PDF file.



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, C[illegible]	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:

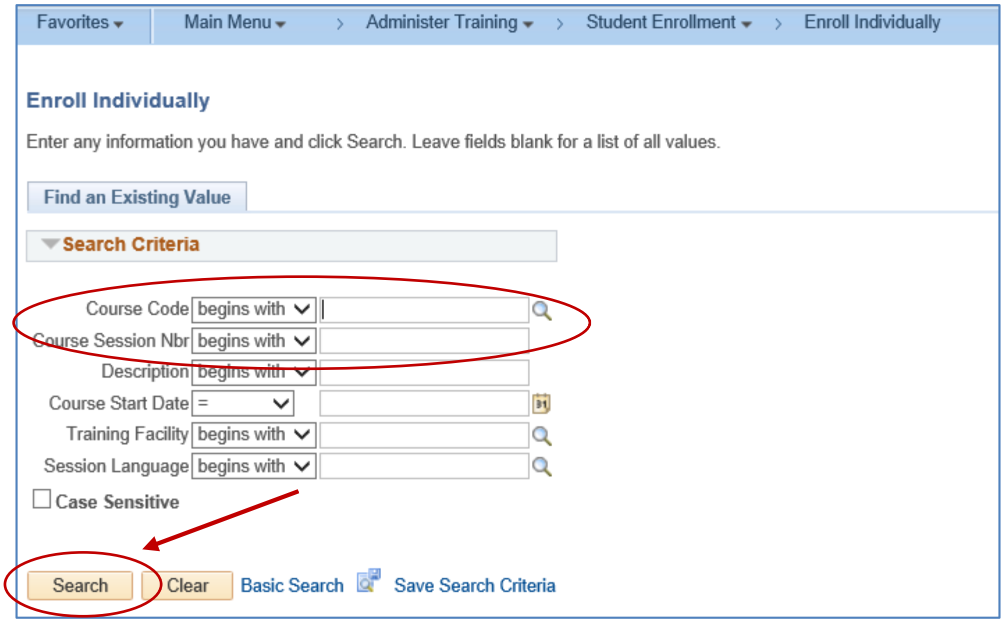
1) Training Coordinator receives the signed attendance sheet.
2) Attendance updates entered in the system based on the signed attendance sheet.
3) Employees who attended and completed the session, their *Attendance* will remain as '*Enrolled*' in the system.
4) Employees who were a '*No Show*' or received 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.

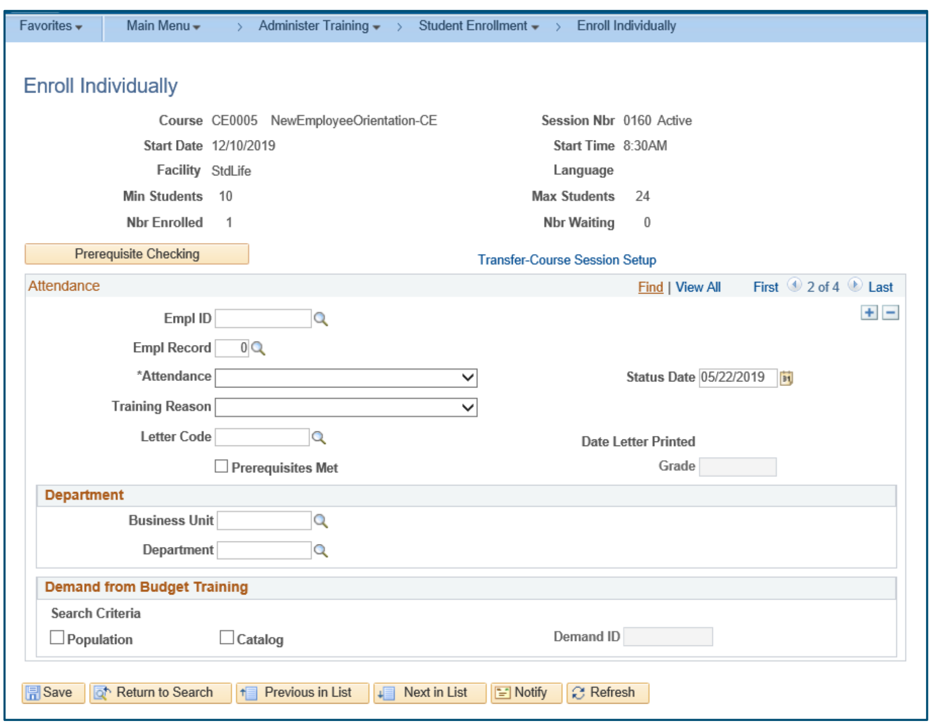
Step One: Navigate to the "Enroll Individually" Page

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.



The "Course Session Enroll Individually" page will appear.

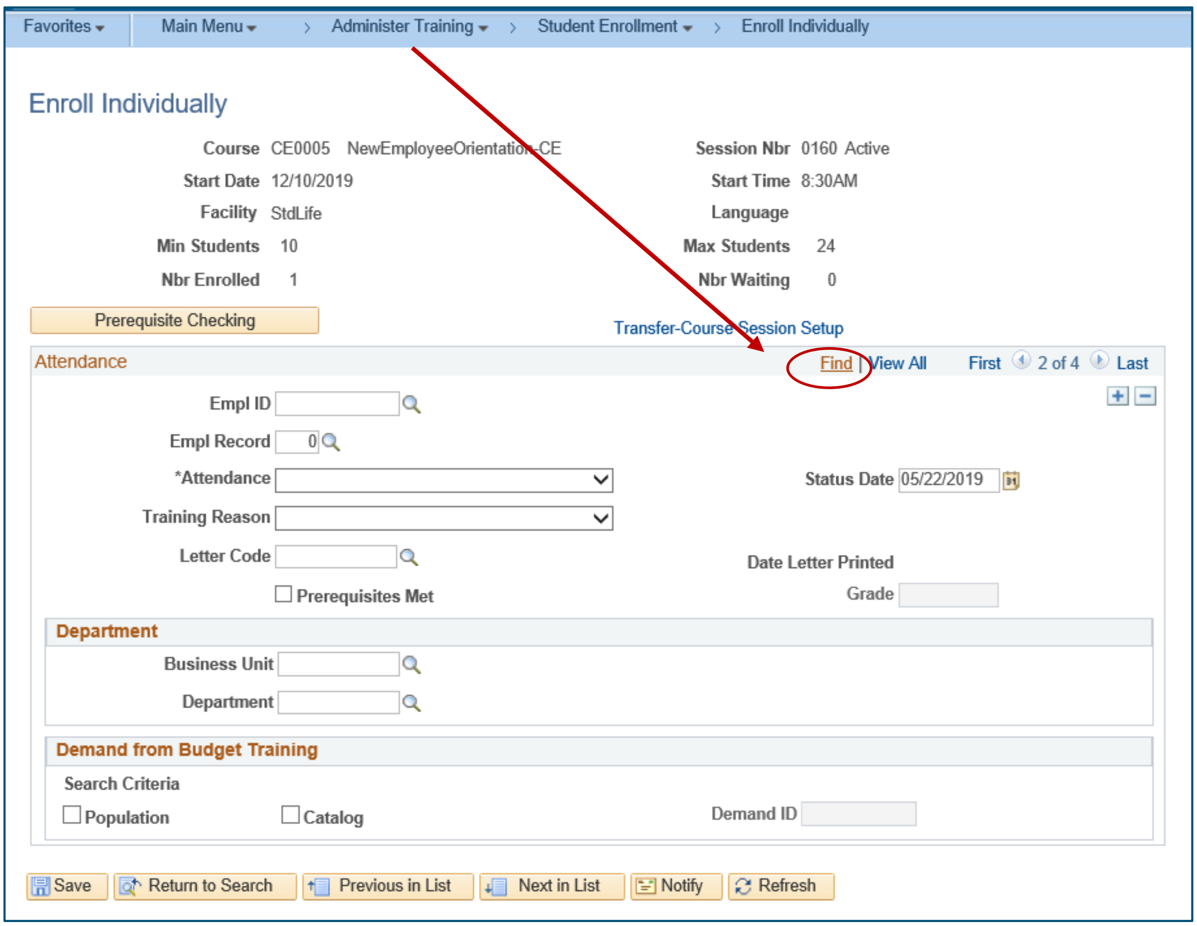


Step Three: Using the signed attendance sheet from the course session, identify the names of employees that must have their attendance changed from enrolled to 'No show' or 'Incomplete'.

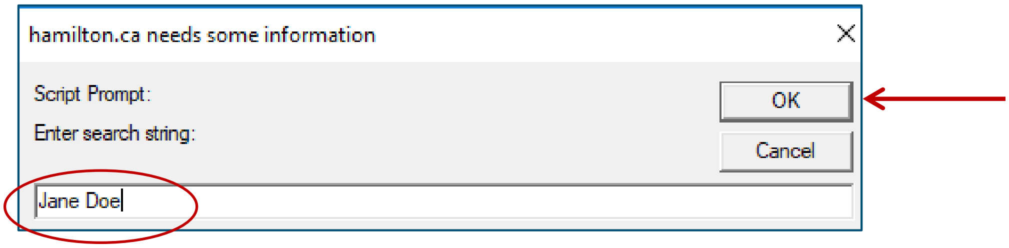
NOTE: Only update the 'enrolled' status for employees who did not attend the session (*No Show*) or did not complete the session (*Incomplete*); otherwise leave all Attendance status as '*Enrolled*'.

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

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

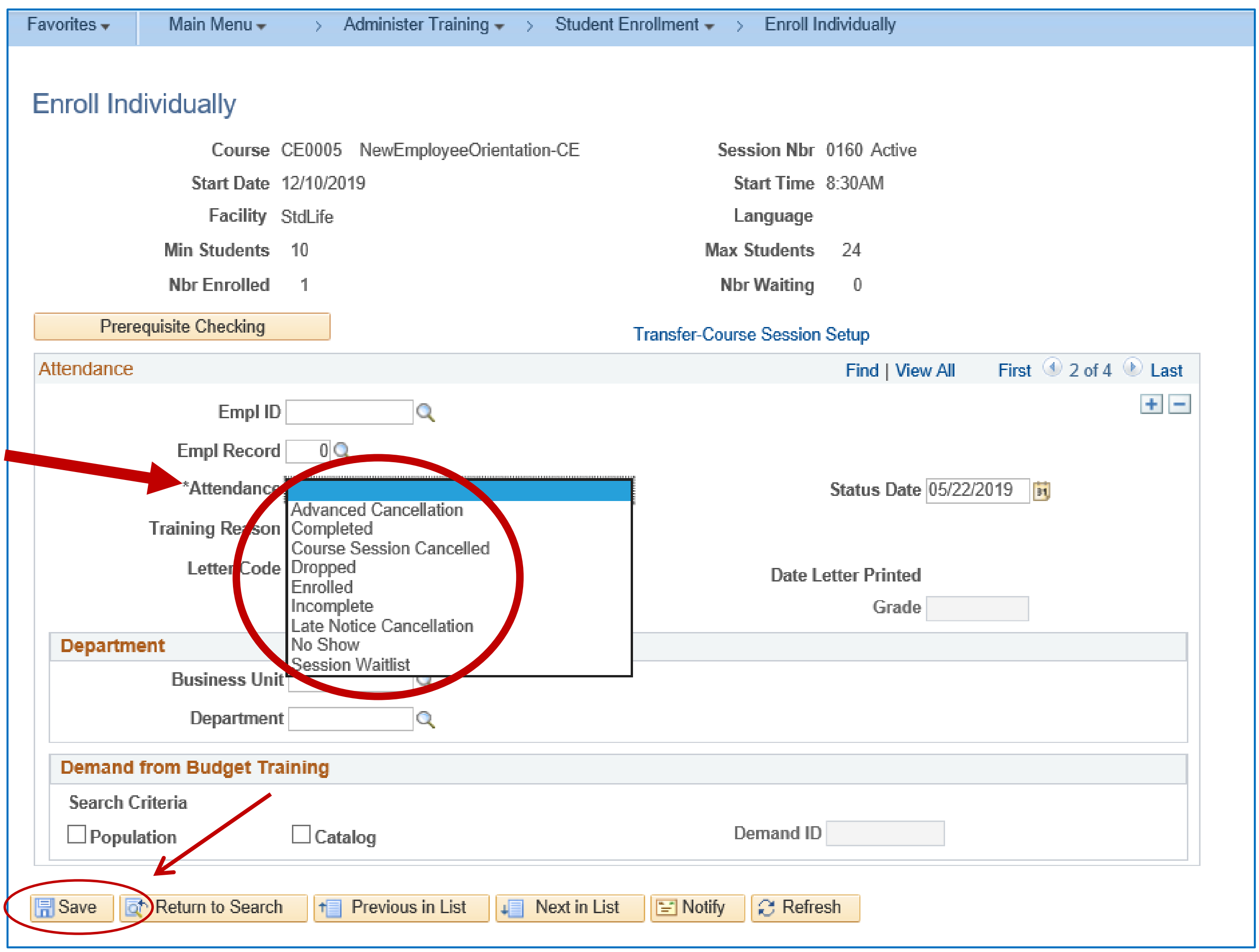


Step Five: When search appears, enter the identified employee's name and click "OK"



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

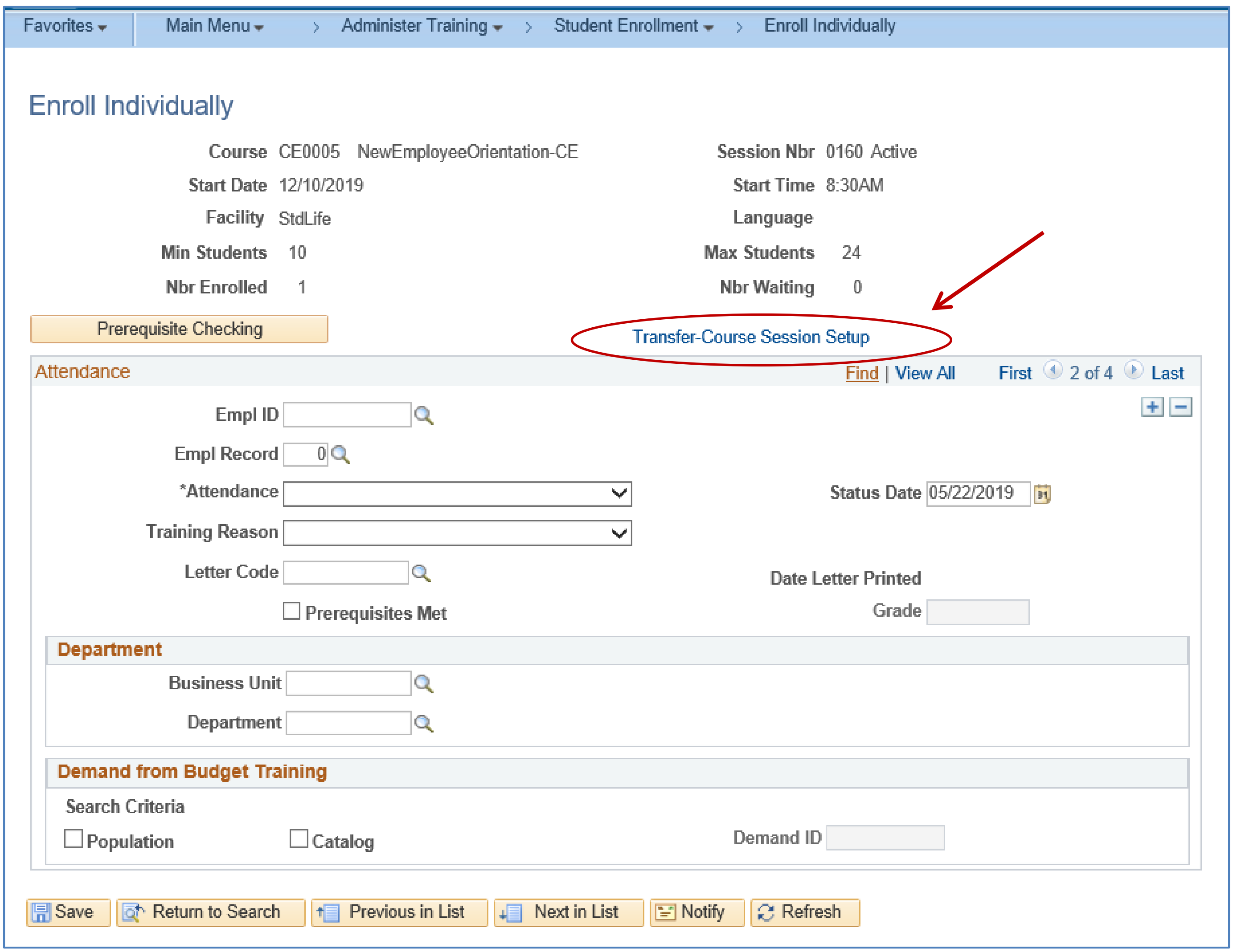
REMINDER! Do not change employee's status from "Enrolled" if they attended and completed the course session. When the course is closed, the 'enrolled' status will automatically change to 'Completed'.



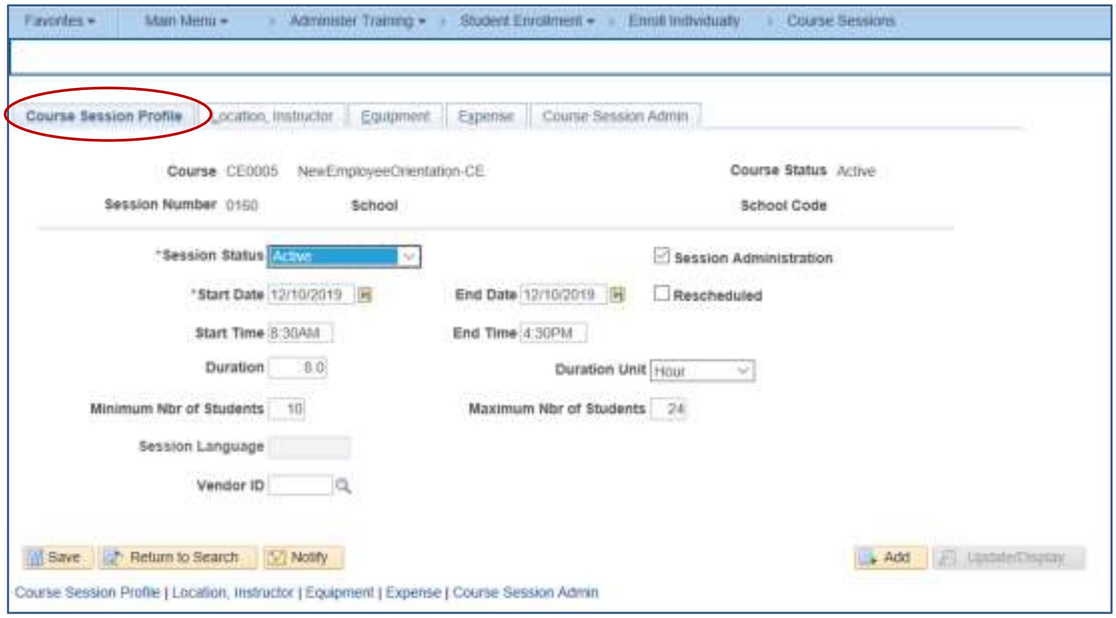
Step Seven: Repeat Steps Four, Five, Six for every employee that requires a status change from ‘enrolled’ to ‘No Show’ or ‘Incomplete’ in the course session.

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”

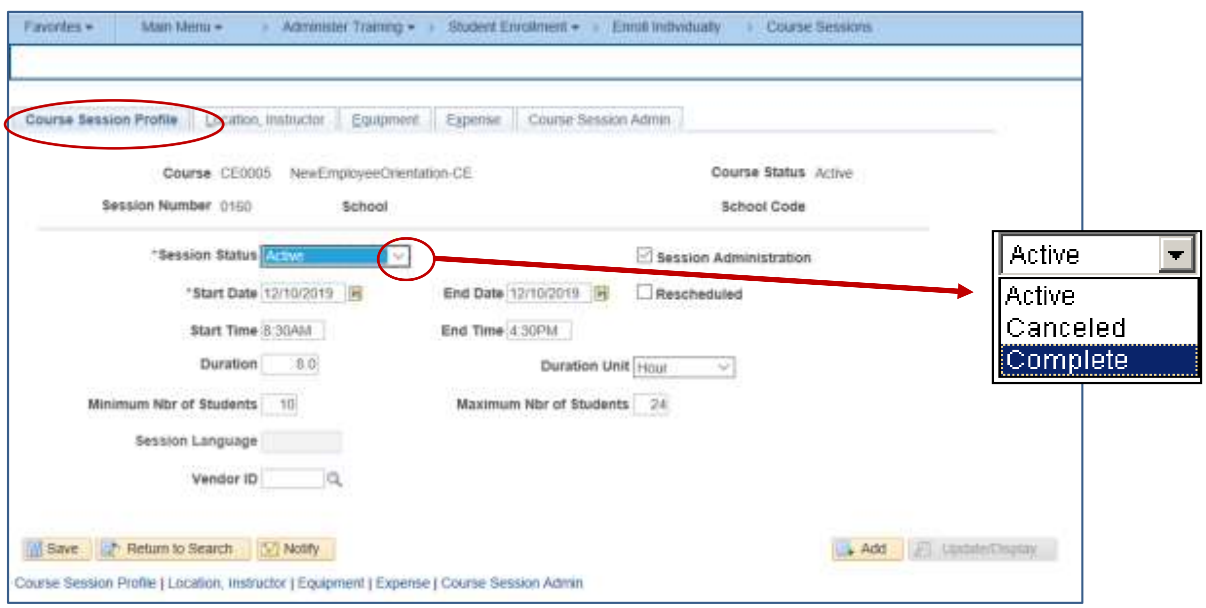


The course session profile page will appear.



Step Nine: Change Session Status to Complete

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



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.

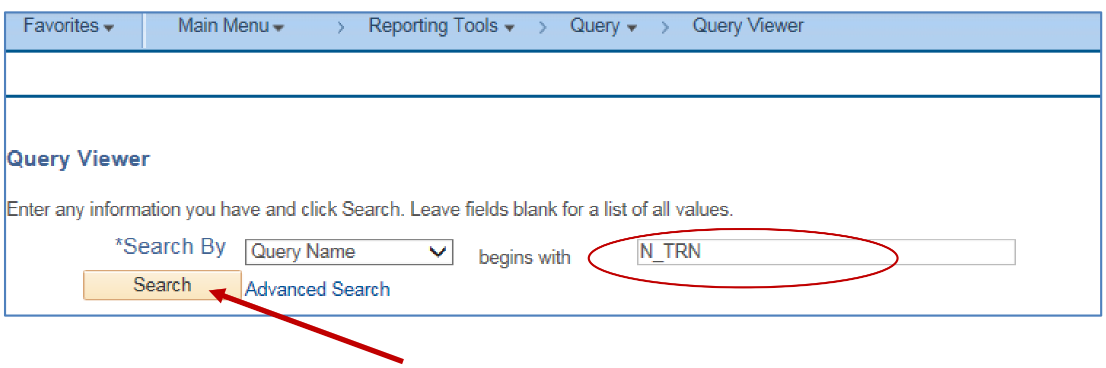
Process Overview:

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**

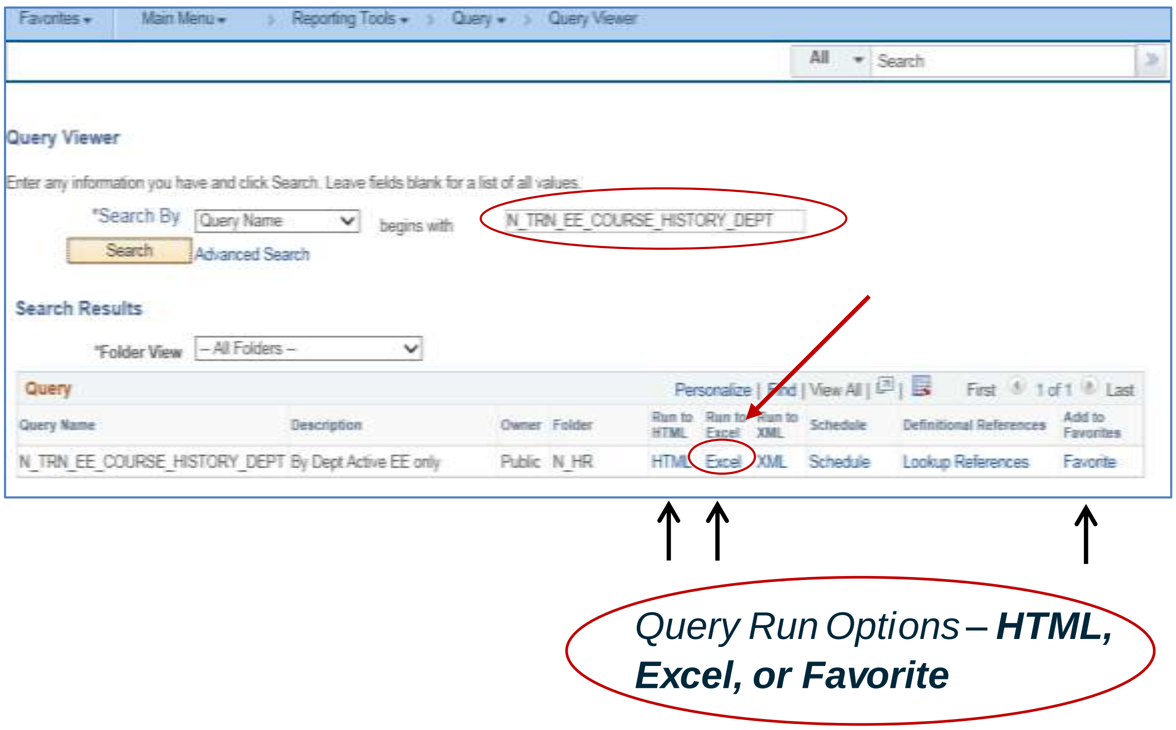
To view a list of all available training queries, in the **'begins with' field,** type **N_TRN > click Search.**



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.**

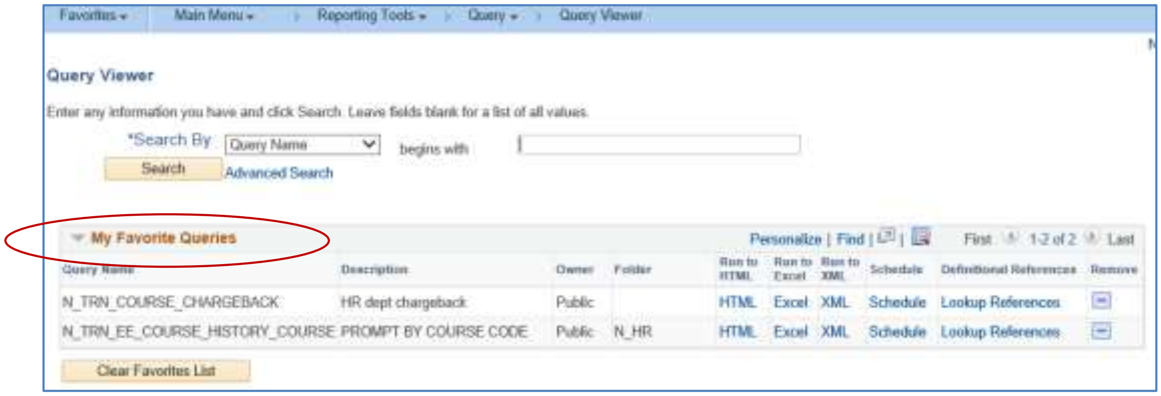


NOTE: Explanation of Query Run Options below.

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

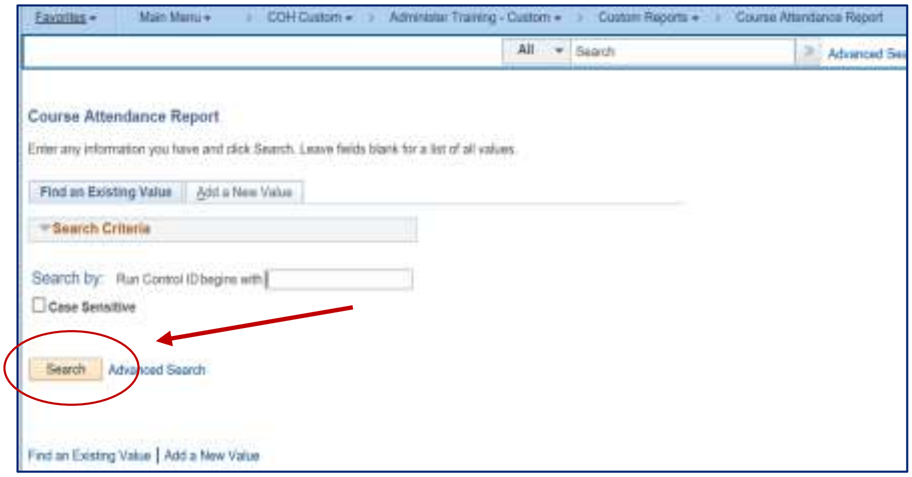
Navigation: **Click on the report you want to run.**

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.

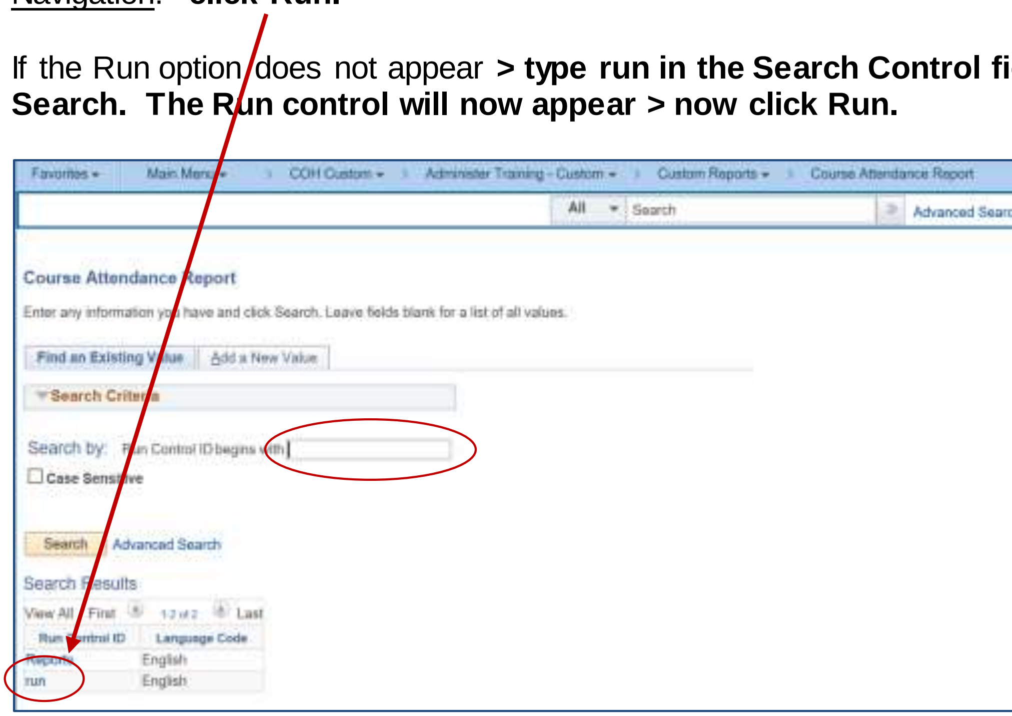
Navigation: **click Search**



Step Three: Search for A Report

Navigation: **click Run.**

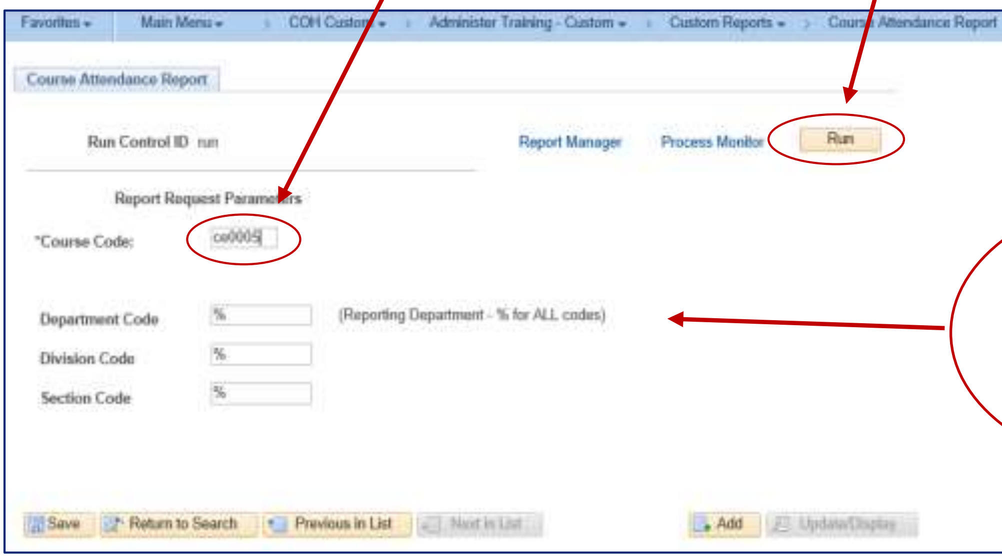
If the Run option does not appear **> type run in the Search Control field > then click Search. The Run control will now appear > now click Run.**



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.

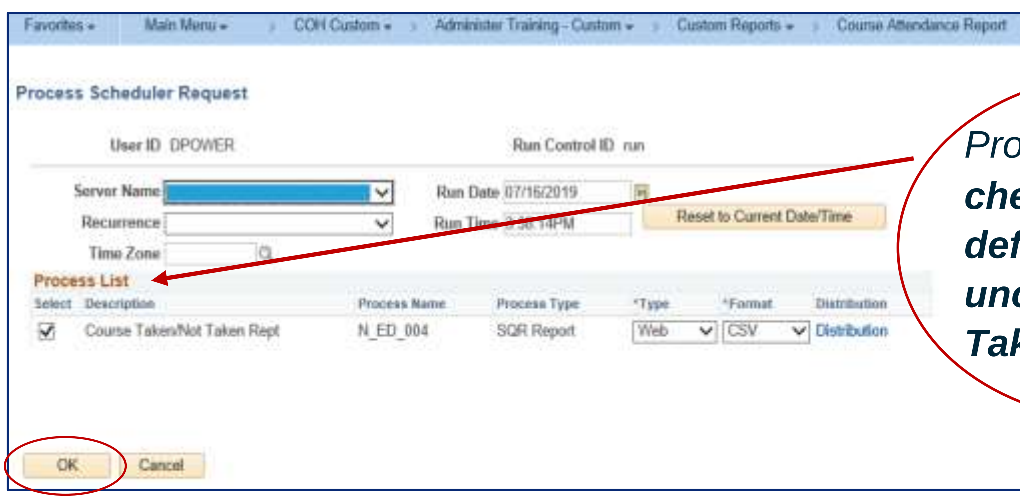
Step Four: Select the Course Code to Run a Report

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



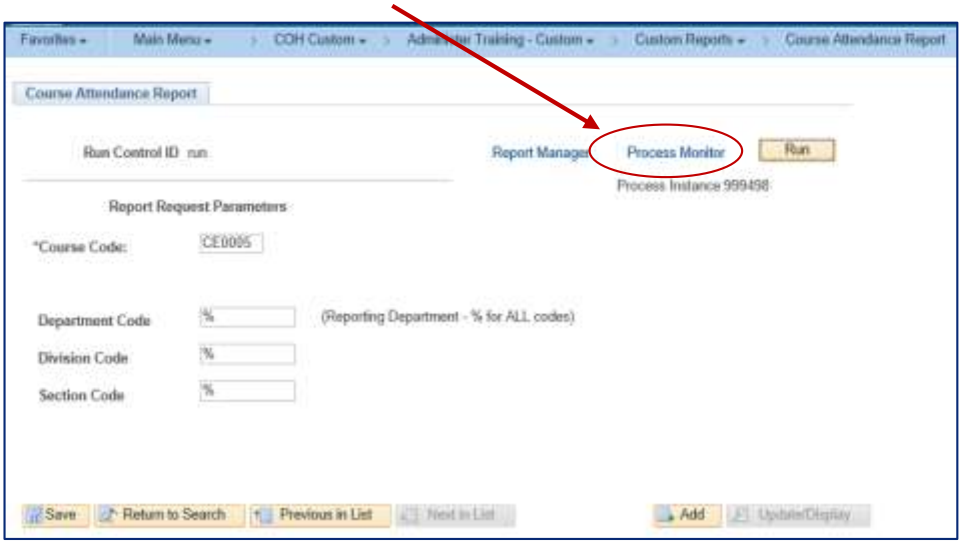
Codes – Dept/Div/Section - ***defaulted to %. Do Not Change***

Navigation: **click Ok.**



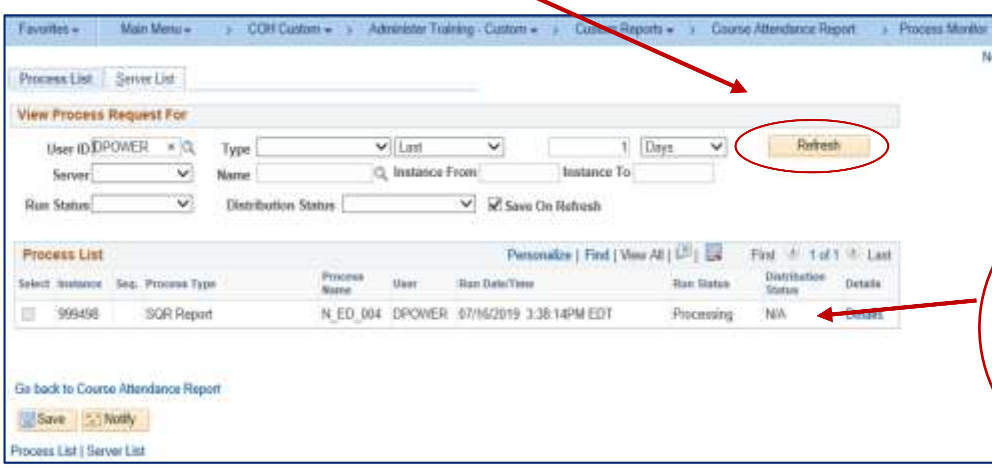
Process List – ***checked off by default. Do Not uncheck Courses Taken/ Not Taken.***

Navigation: **click Process Monitor.**



Step Five: Run A Report

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

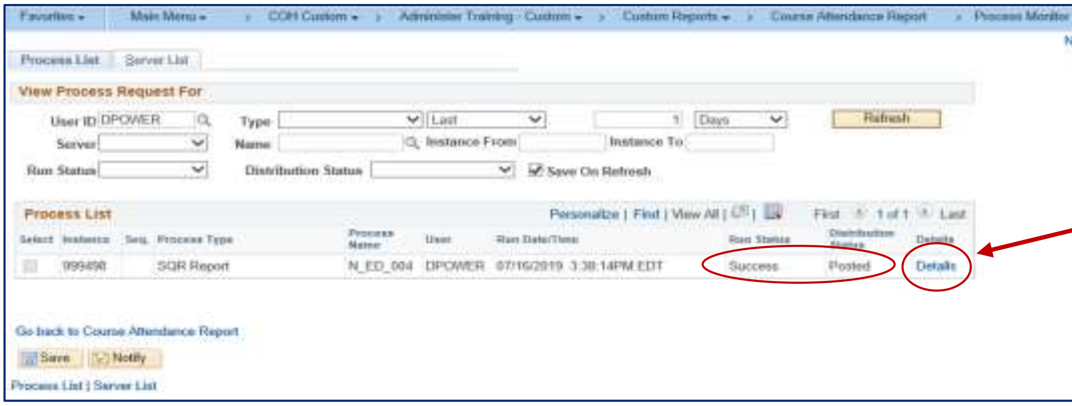


*Run Status and Distribution Status - **defaulted to Processing and N/A***

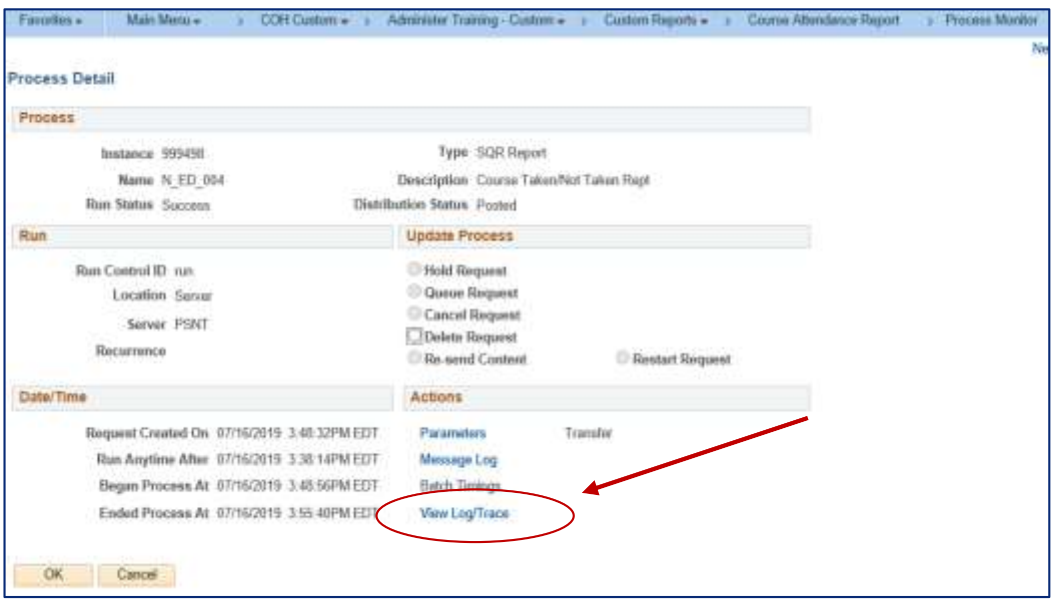
The refresh process is complete when the Run Status shows Success **and the Distribution Status shows** Posted.

Step Six:

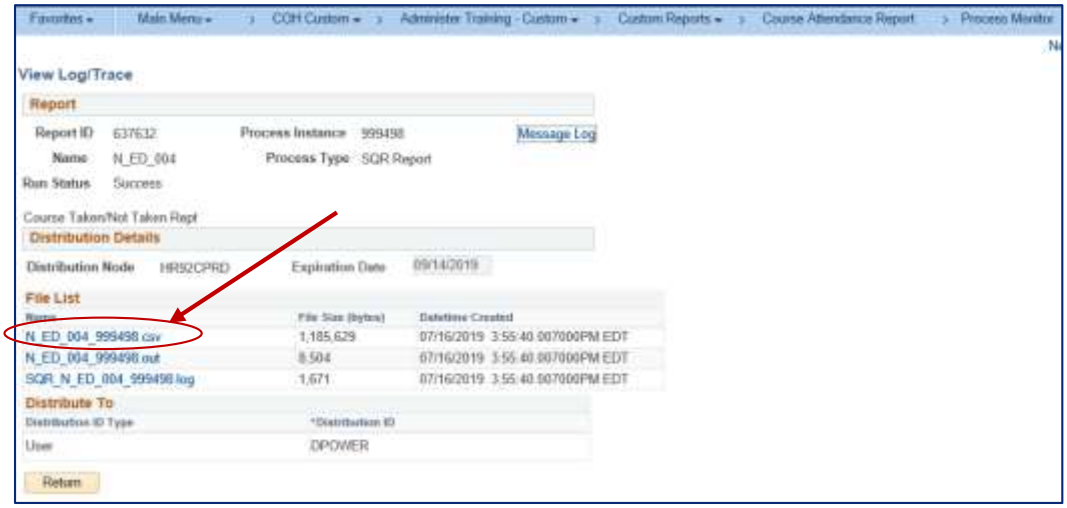
Navigation: **Click Details.**



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

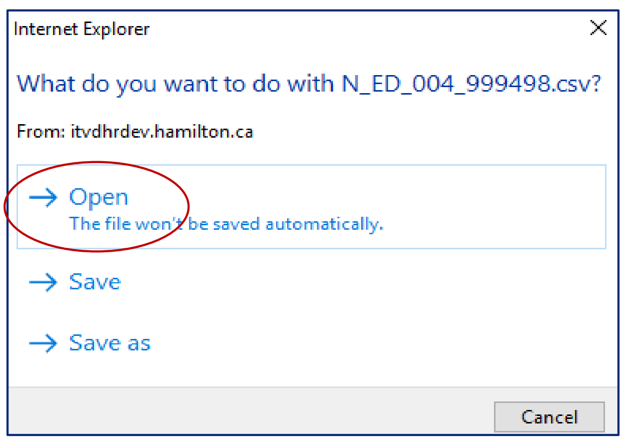


Navigation: **Click the file ending in .csv.** This will download the data to Excel.



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					Employee	Empl	Employee	Empl	Position	Manager	Course	Completed
12	Departmer	Division	Section	Deptid	Number	RCD	Name	Status	Title	Level	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.

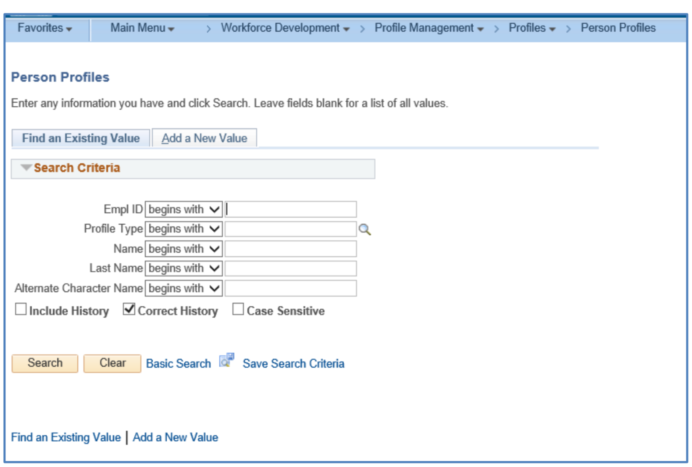
Process Overview:

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

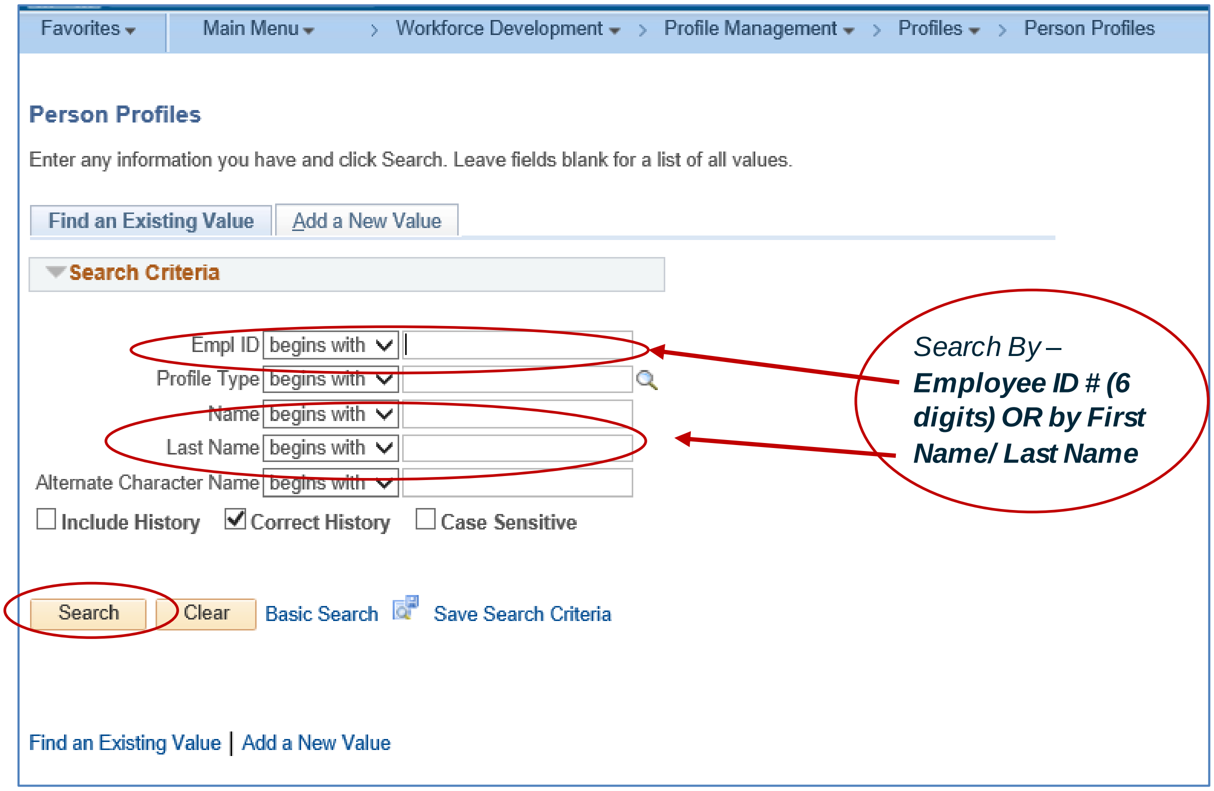
1) Training Coordinator is informed by employee of issued license/certification.
2) Training Coordinator enters the information in PeopleSoft.
3) Employee Record is now updated with the current license/certification.
4) Employee can view the added entry in the ESS Licenses/Certifications
5) Leaders can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

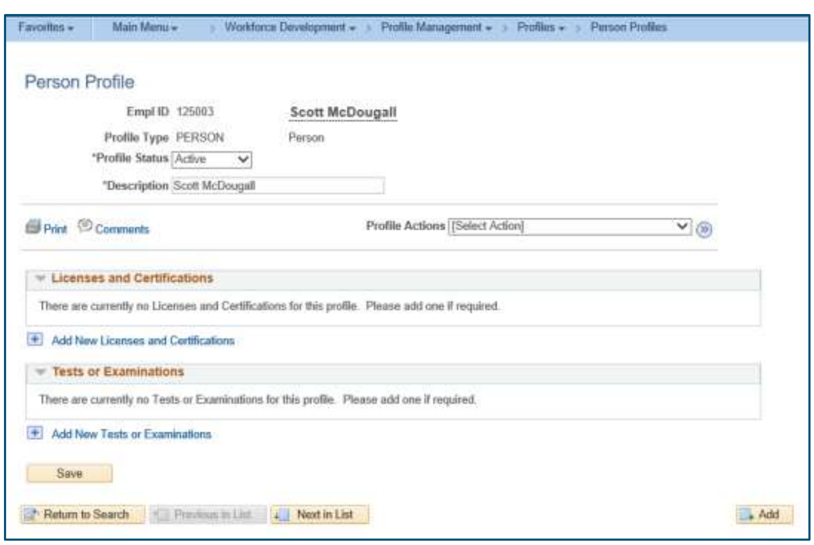


Step Two: Enter the Employee's ID number or their first and last name.

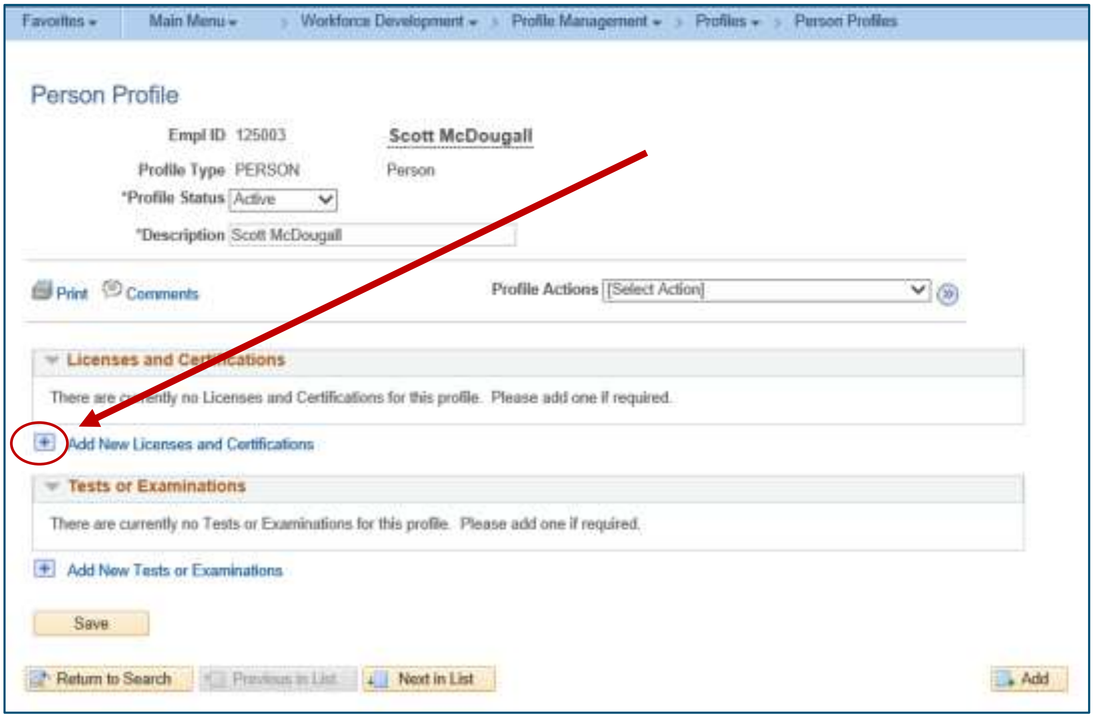


Step Three: Click Search.

The Employee's Person Profile Page will appear.

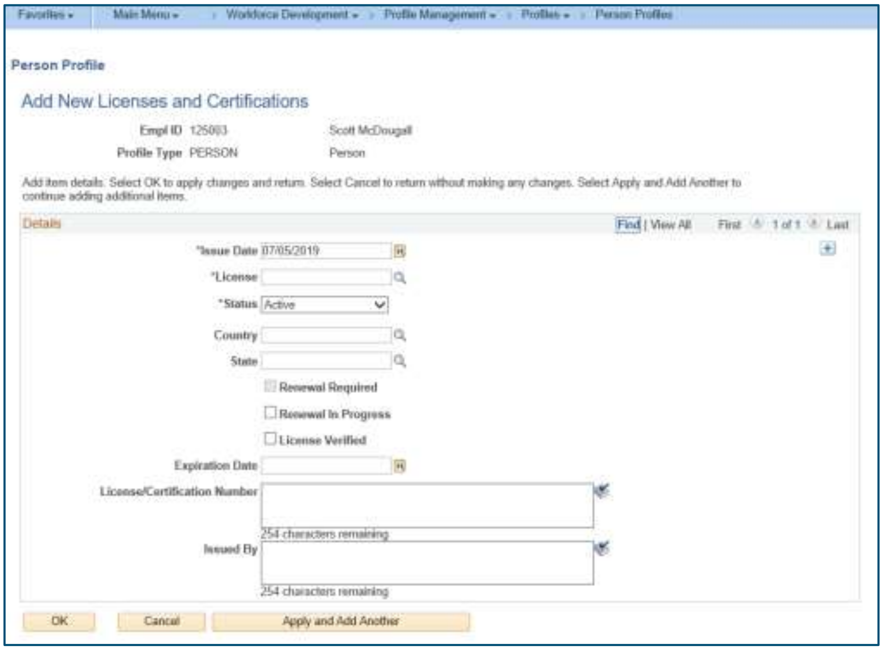


Step Four: Click “Add New Licenses and Certifications”

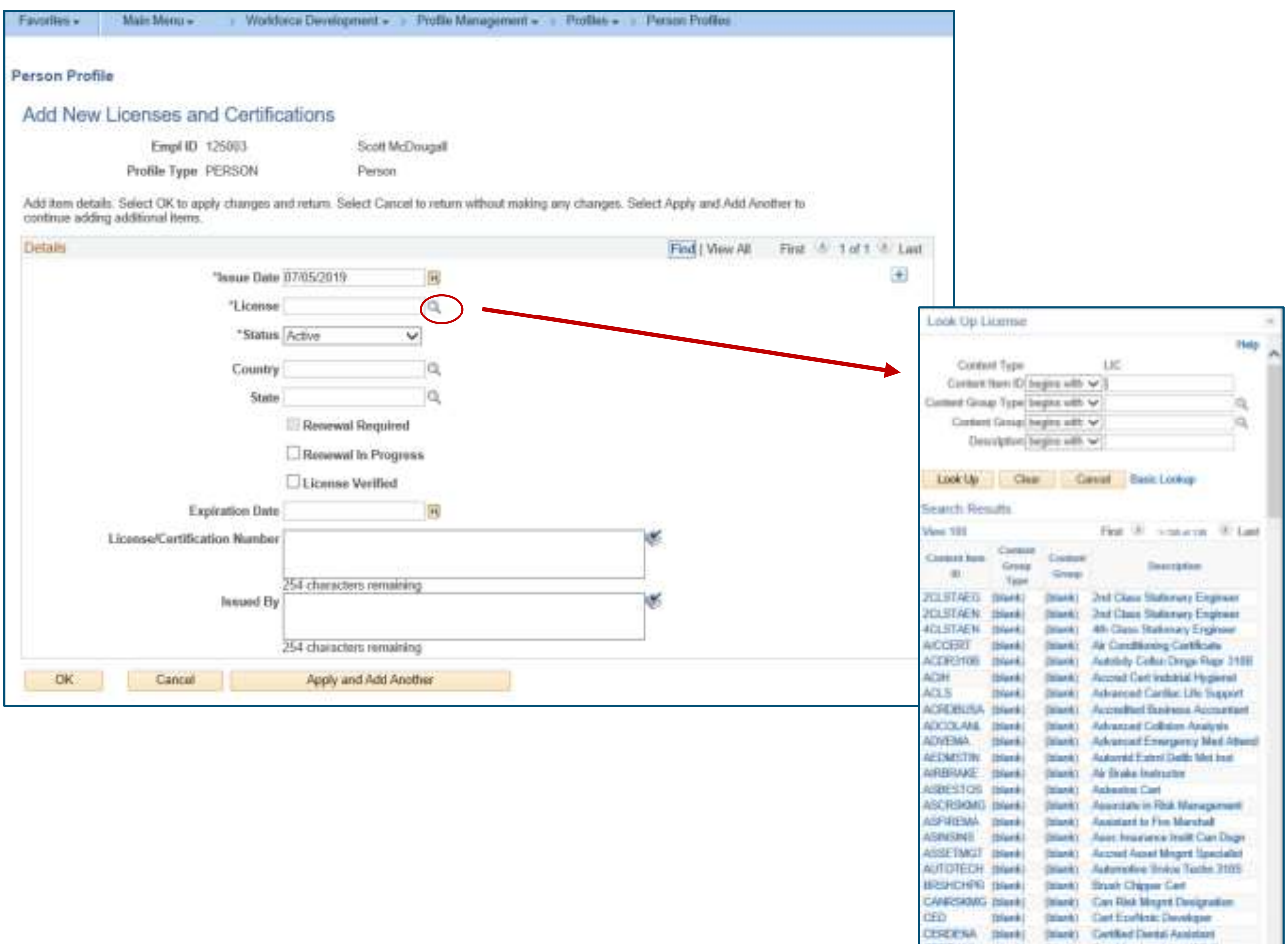


NOTE: In the above example, this employee currently has no existing licenses/certifications documented in PeopleSoft

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



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



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

Step Seven: Select correct license or certification from search results

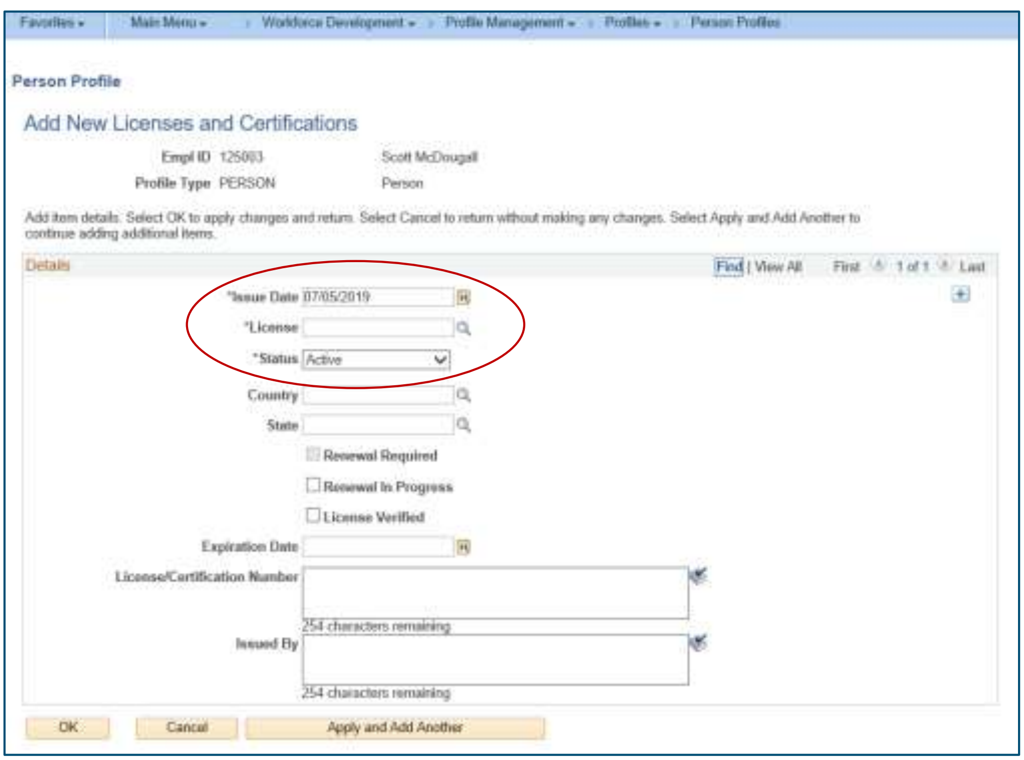
Note: If the correct license does not appear in the search results, contact the Training Administrator to add a new license or certification to the system.

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

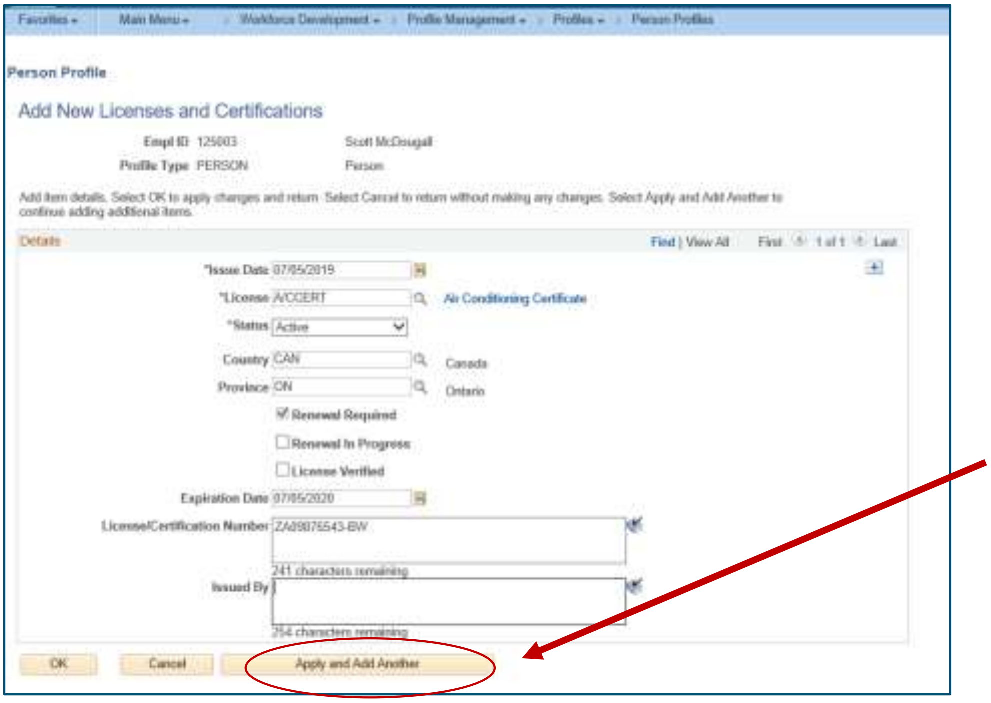
Required Fields are indicated with an Asterix (*). Required fields are as follows:

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

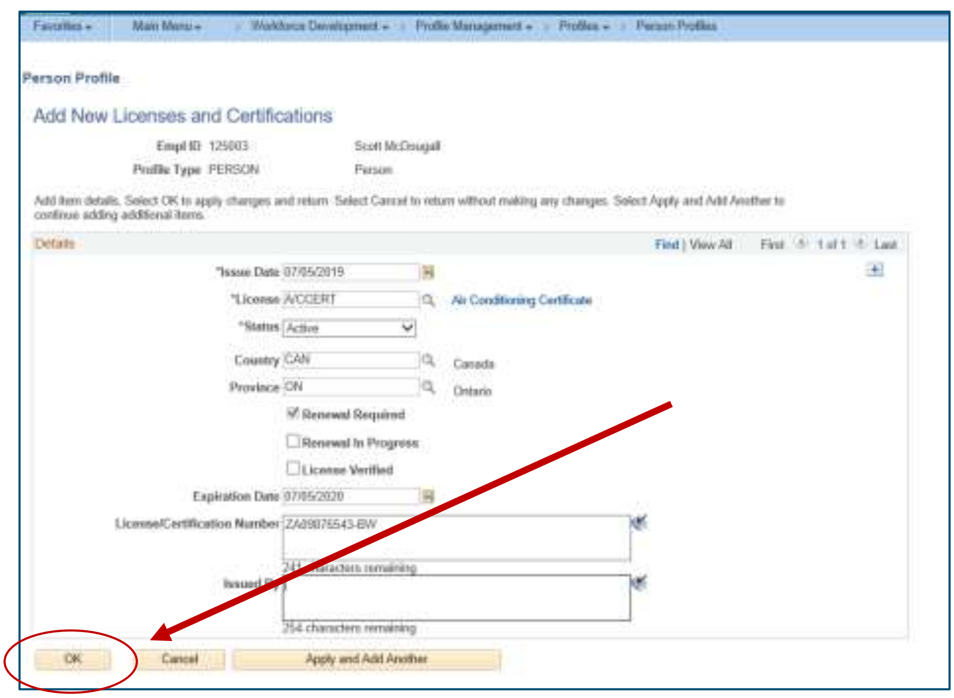
NOTE: Use the icon next to each field to select an option.



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



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



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	30 characters maximum. (includes a suffix of Department naming convention, eg. Tree Cutting-**PW**) Department Naming Conventions for referencing: <u>Suffix</u> <u>Department Name</u> 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	Internal (delivered by COH) External (delivered by external party or vendor)
Course Type	Categorizes the courses. Options include: - Core Competency - Corporate Technical Competency - Job Specific Technical Competency - Pilot
Primary Delivery Method	Options include: - Classroom - On the job training - Web-based - Webinar - Workbook - E-learning/video
Min/Max Students	Enter the numbers to be used for determining the minimum and maximum number of students per session.

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 Code cont.	Subcategory to <u>Competencies</u>*:* *Individual Contributor* *Emerging People Leader* *People Leader* *Emerging Executive* *Executive* *Approaching Retirement* Subcategory to <u>Job Skills</u>:

Field	Description
	Division
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. *If no cost* 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 *If no cost*, 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 he 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 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.

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.)