

Welcome to Administer Training

Lesson 2

Welcome to Lesson 2

Objectives

After completing this lesson, you will be able to:

- Waitlist students for a course session.
- Enroll students in a course session.
- Run reports that you can use to conduct a training session.

Lesson 1 Review:

In the previous lesson you learned how to use Setup tables and how to use them to create a Course and a Course Session. You also learned about reports related to Setup, Courses, and Sessions.

Lesson Topics

In this lesson you will learn about the following topics.



Lesson Overview: Enrollment Planning



There are 2 methods in which you can manage your student enrollment:

1. Set up waiting lists and create course sessions only when there are enough students to fill a class. Manually add the students to a waitlist and automatically enroll them.
2. Set up course sessions and publish a training calendar that students review and make enrollment requests. Manually add the students to a waitlist/automatically enroll them or manually enroll them without using a waitlist.

Topic 1: Waitlist Students



The Course Wait List is used to add students who are interested in a course to a list in order to track interest and create courses when there is need for a class. It is also used to auto-enroll students in courses.

Wait lists save time in tracking course demand and ensuring enrollment fairness. They can also be used to request a course before a session has been set up, request a course in which all sessions are full, or to request a particular session of a course once it has been scheduled.

Topic 1: Create/Update Course Wait List Page



Navigation: Administer Training> Create/Update Course Wait List

Create/Update Course Wait List

Course 92CBT5 9.2 SHARP Administer Training

Nbr Waiting 2

Attendance Personalize | Find | View All | First 1-2 of 2 Last

Empl ID	Empl Record	Name	*Attendance	Letter Code	*Waitlst Dt	Session Nbr	Status Date
K000(	0	K	Course Waitlist	WTC	05/09/2017		05/09/2017
B0000000	0	Mi	Course Waitlist	WTC	05/09/2017		05/09/2017

Glossary

Topic 1: How To Waitlist Students



Navigation: Administer Training> Create/Update Course Wait List

1. Enter a Course Code and click Search.
2. Add a new row and enter the Employee ID and Employee Record # of the student you are adding to the wait list.
3. Choose Course Waitlist or Session Waitlist for Attendance.
   - Course Waitlist will enroll the student in any session of the course that comes available.
   - Session Waitlist will choose an active session that has already been set up. Session Waitlist has priority over Course Waitlist during Auto-Enrollment.
4. Enter the Waitlist Date.

Required fields are marked with asterisks (*)



To add a new row, click the plus sign button. To delete a row, click the minus sign

Topic 2: Student Enrollment



Enrollment Methods:

- Course Session Auto-Enrollment
- Enroll Individually
- Quick Enrollment
- Reschedule Between Sessions

Topic 2: Course Session Auto-Enrollment



Course Session Auto Enrollment is used to automatically enroll students who have been waitlisted for a course or course session. If you are ready to start enrollment for a particular session of a course and you have students on the waiting list, this allows you to move them over to Course Session Enrollment as a group rather than typing them individually.

A course session must be set up prior to using Course Session Enrollment.

* If a student is waitlisted for multiple sessions of a single course, when the student is enrolled in a session, the other sessions that are waitlisted will be deleted.

Topic 2: Course Session Auto-Enrollment Page



Course Session Auto Enrollment

Course 92CBT5 9.2 SHARP Administer Training **Nbr Waiting** 2

Auto-Enrollment

Session Nbr **Max Students** 0

Attendance Find | View All First 1-2 of 2 Last

Student Name	ID	Attendance	Status Date	Waitlst Dt	Sessn	Letter Code
Michelle	B0000	Crse Wait	05/09/2017	05/09/2017		WTC
Kristine	K0000	Crse Wait	05/09/2017	05/09/2017		WTC

Save Return to Search Notify

Glossary

❑ Topic 2: How To Enroll Waitlisted Students with Course Session Auto-Enrollment



Navigation: Administer Training> Student Enrollment> Course Session Auto Enrollment

Required fields are marked with asterisks (*)

1. Enter a Course Code and click Search.
2. Review the Waitlisted students.
3. Enter the Session Number you will be enrolling them into.
4. Press Save.



To add a new row, click the plus sign button. To delete a row, click the minus sign

Topic 2: Enroll Individually by Course



The Enroll Individually page is used to manually enroll students in a course session, one person at a time. You can also use this page to clone course sessions.

You will enter individual students at the time you receive their registration form for a course session or wait until you have received several registration forms and enter them one right after another.

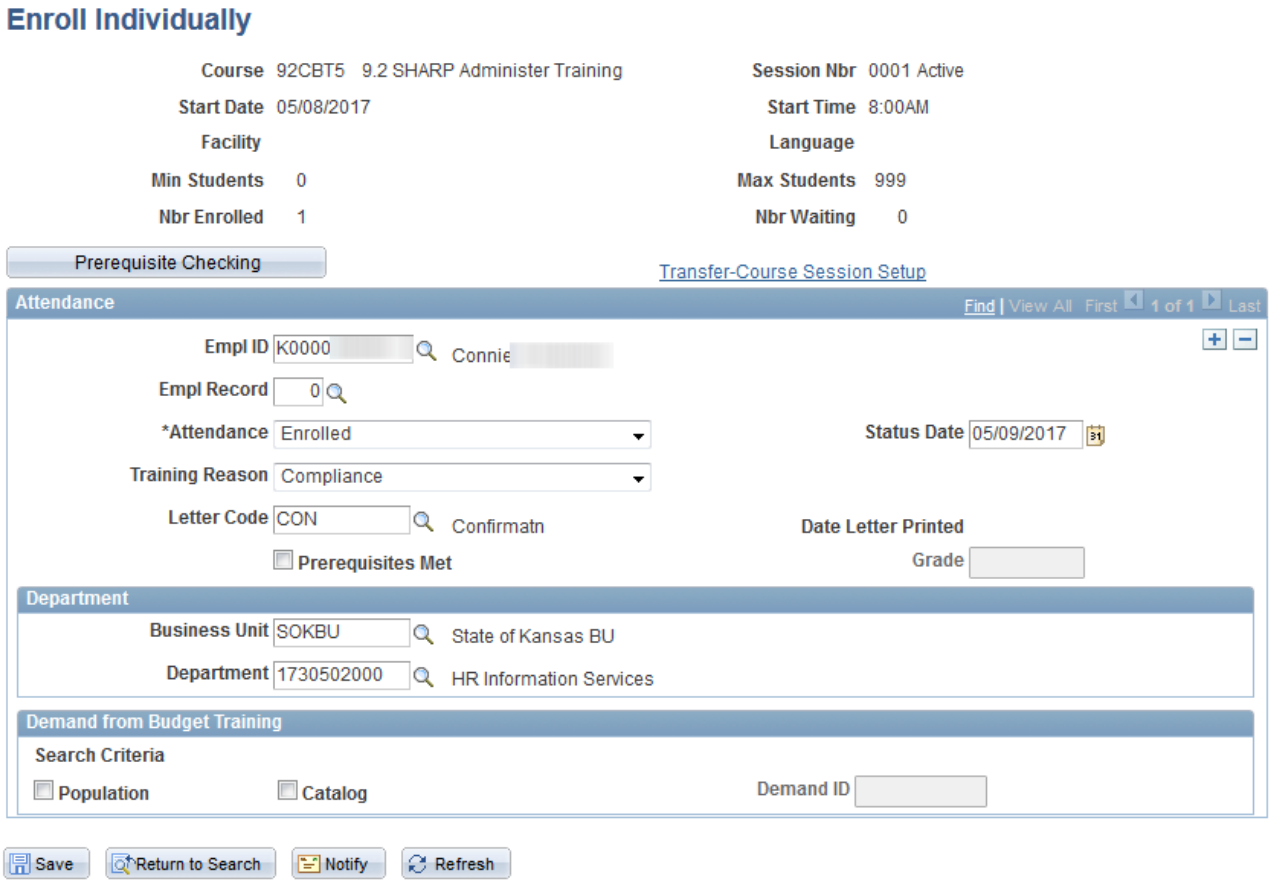
Search for the Course Session and choose it. When the page opens, complete one student's enrollment. To enroll another student, press the plus sign to add a new row and complete the new student's information.

If a Prerequisite is entered on the Course, clicking Prerequisite Checking will check students for course completion.

Clicking the Transfer-Course Session Setup link will take you to the Course Session setup page and clone the setup to this new course session.

Topic 2: Enroll Individually Page





Glossary

Topic 2: How To Enroll Individually



Navigation: Administer Training> Student Enrollment> Enroll Individually

1. Enter a Course Code and click Search.
2. Enter the Employee ID of the student you are enrolling and choose Enroll under the Attendance Status field.
3. Enter a Training Reason and Department (optional).
4. Click Prerequisite Checking if a prerequisite was set for this course (optional).
5. Click the plus sign to add another student.
6. Save.

*If you wish to set up a new session just like this one to enroll more students, click the Transfer-Course Session Setup. Set up the session and navigate back to Enroll Individually to continue to enroll students.

Required fields are marked with asterisks (*)



To add a new row, click the plus sign button. To delete a row, click the minus sign

Topic 2: Course Enrollment <u>by Student</u>



There are two ways to enroll students individually into many courses.

1. Enroll in Course
2. Quick Enrollment

Both of these options provide managers two online ways to view an employee's training record.

Topic 2: Enroll in Courses

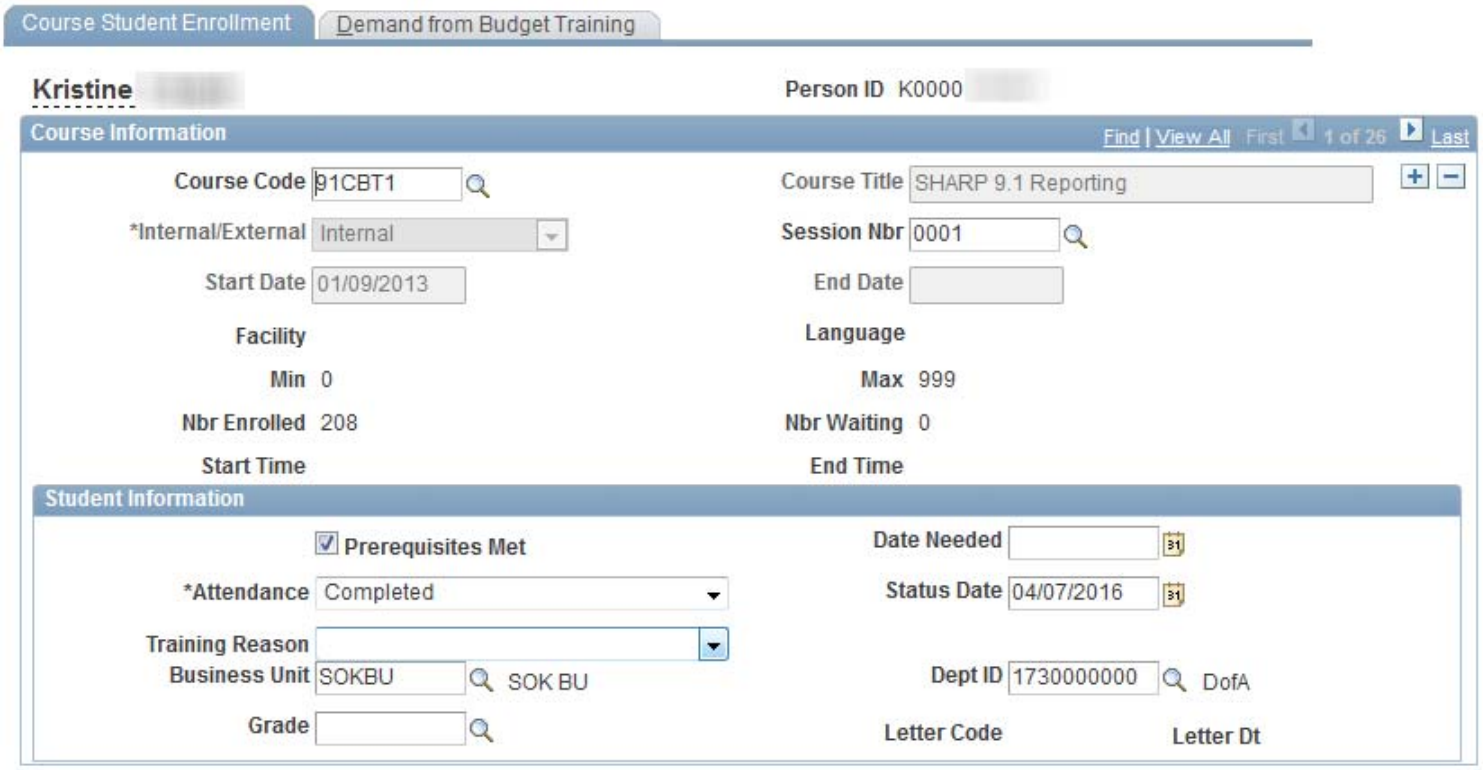


Enroll In Course is used to Add or Update information in a student's training record. It is also used to Cancel out of a course/session. This is the employee's main training record.

All row statuses that are entered for the employee are recorded on this page such as Enrolled, No Show, Cancelled, and others.

Topic 2: Enroll in Courses Page





Glossary

Topic 2: How to Enroll in Courses by Student



Navigation: Administer Training> Student Enrollment> Enroll in Course

1. Enter an Employee ID and click Search.
2. Add a new row.
3. Enter the Course Code and Session Number.
4. Check on Prerequisites Met and the Date Needed if desired.
5. Choose ‘Enrolled’ under Attendance.
6. Enter a Training Reason if desired.
7. Save.
8. To change the status of Student record to Cancelled, Dropped, No Show, etc, return to this record.
9. Change the Attendance field to one of the other choices in the drop down box.
10. Save.

Required fields are marked with asterisks (*)



To add a new row, click the plus sign button. To delete a row, click the minus sign

Topic 2: Quick Enrollment Page



Identifies courses and sessions for which a student is enrolled. You can also view training history and the status.

Student Course Enrollment

M [redacted] Person ID B000[redacted]

Enrollment Details — Personalize | Find | View 6 | First 1-32 of 32 Last

	*Course	Description	*Session Nbr	Course Start Date	*Attendance
1	264FRM	Creating Forms w/ Word & Adobe	0001	06/27/2007	Completed
2	89CBT2	SHARP 8.9 Position Mngmt CBT	0001	07/25/2007	Completed
3	89CBT5	SHARP 8.9 Entrprse Learnng CBT	0001	07/25/2007	Completed
4	8CBT02	SHARP 8.0 Manage Positions		07/14/2003	Completed
5	8CBT03	SHARP 8.0 Administer Workforce		07/14/2003	Completed
6	8CBT05	SHARP 8.0 Administer Training		07/14/2003	Completed

Glossary

Topic 2: How to use Quick Enrollment



Navigation: Administer Training> Student Enrollment> Quick Enrollment

1. Enter an Employee ID and click Search.
2. Add a New Row by clicking the plus sign.
3. Add the Course Code and Session Number (if available).
4. Enter an Attendance Status.
5. Save.
6. To change the status of a student record, return to this record.
7. Change the Attendance field to one of the other choices in the drop down box.
8. Save.

Required fields are marked with asterisks (*)



To add a new row, click the plus sign button. To delete a row, click the minus sign

Topic 2: Reschedule Between Sessions Page



Express Rescheduling is used to reschedule students from one course session to another or from a course session to a course waiting list. You can also update statuses here.

Reschedule Between Sessions

Course 92CBT5 9.2 SHARP Administer Training

Attendance Personalize | Find | View All | First 1-2 of 2 Last

Session Nbr	*Status	Status Date	ID	Student Name	Letter
0001	Enrolled	05/09/2017	B0000	Mi	CON
0002	Enrolled	05/09/2017	K0000	Kri	CON

Glossary

Topic 2: How To Reschedule Between Sessions



Navigation: Administer Training> Student Enrollment> Reschedule Between Sessions

1. Enter a Course Code and click Search.
2. Change the Session Nbr to the desired session.
3. Change the Status to another value: Enrolled, Course Waitlist, or Session Waitlist.
4. Change the Status Date.
5. Save.

Required fields are marked with asterisks (*)



To add a new row, click the plus sign button. To delete a row, click the minus sign

Topic 3: Related Reports



See http://www.da.ks.gov/sharp/reports/default.htm for a description, criteria, and data returned for each report below:

Waitlist Reports

- Course Waiting List (TRN003) – List of students on the wait list for a course or session.

Enrollment Reports

- Course Session Roster (TRN002) – Roster of students by session number.
- Equipment Checklist (TRN034) – Equipment required for a session.

Lesson Summary



Waitlisting students can save time when it is time to enroll for a course session.



There are many ways to enroll a student in a course session. Whether you have many students for one course, or many courses for one student, choosing the best method will help you to be more efficient.



Using Enroll in Course or Quick Enrollment will show you the employee's training history.



Glossary

Glossary – Create/Update Course Wait List



- Name: Displays the name when you select the Employee ID
- Attendance: values are
  - Crse Wait: Enroll the student in any session of the course that comes available.
  - Sessn Wait: Enroll the student in a particular session that is set up. *Students with this status are given priority over those with Crse Wait when auto-enrolling.
- Waitlist Dt: Displays the date the student was waitlisted. Can be overridden. Auto-enrollment gives those with older waitlist dates the priority over newly waitlisted students.
- Session Nbr: Enter a session number if Sessn Wait was selected as Attendance. This is the number of a specific instance of a course.
- Status Date: Auto populates with current date.
- Letter Code -This function is delivered by PeopleSoft, but will not be used by the State of Kansas.

Back to Create/Update Course Wait List

Glossary – Course Session Auto-Enrollment

- Letter Code - These functions are delivered by PeopleSoft, but will not be used by the State of Kansas. s
- Nbr Waiting: Number of people on the waitlist for thi course
- Session Nbr: The session number you will be enrolling into. This is the number of a specific instance of a course.
- Max Students: Student # limit.
- Attendance section: Employees who are waitlisted for the course.

Back to Course Session Auto-Enrollment

Glossary – Enroll Individually



- Employee ID: Enter the Employee ID
- Empl Record: Populates when Employee ID is entered.
- Attendance: The status of the session. Choose Enrolled
- Status Date: Auto populates with current date.
- Training Reason: Choose the reason for the training (optional)
- Department, Business Unit: populates when Employee ID is entered.
- Letter Code, Letter Dt, Demand from Budget Training section - These functions are delivered by PeopleSoft, but will not be used by the State of Kansas.

Glossary – Enroll In Courses

- Course Code: Enter course code. This is the code that was assigned to a specific course.
- Course Title: Populates when Course Code is entered. This is the name of the course.
- Internal/External: Populates when Course Code is entered.
- Session Nbr: The session number of the course. This is the number of a specific instance of a course.
- Start Date: Enterable until Session Nbr is entered.
- End Date: Enterable until Session Nbr is entered.
- School Code and School Name: Enterable until Course Code is entered.
- Facility: Enterable until Course Code is entered.
- Prerequisites Met: Check on if they are met.
- Attendance: Change the Attendance to one of the list values.
- Training Reason: Enter a reason for the training (optional).
- Date Needed: Enter the date the training is needed by.
- Status Date: Auto populates with current date.
- Dept ID: Populates with the course department id.

Back to Enroll Individually Back to Enroll in Courses

Glossary – Quick Enrollment



- Employee ID: Enter Employee ID to pull up the record.
- Course Code: Enter the Course Code. This is the code that was assigned to a specific course.
- Session Nbr: Enter a Session Nbr if available. This is the number of a specific instance of a course.
- Attendance: Choose the Attendance value from the list.

Back to Quick Enrollment

Glossary – Reschedule Between Sessions

- Course Code: Enter the Course Code. This is the code that was assigned to a specific course.
- Session Nbr: Enter a Session Nbr if available. This is the number of a specific instance of a course.
- Status: Choose between Enrolled, Course Waitlist, or Session Waitlist.
- Status Dt: Auto populates with current date. You may change this date.
- Letter: This function is delivered by PeopleSoft, but will not be used by the State of Kansas.

Back to Reschedule Between Sessions