

Welcome to Administer Training

Lesson 1

Overall Course Objectives

In this course, you will gain an introduction to the SHARP Administer Training module

- In Lesson 1 you learn the basic training process. You also learn how to set up the system for courses, the courses themselves, and course sessions. You learn how to generate related reports.
- In Lesson 2 you will learn how to waitlist and enroll students into courses and sessions. You will learn how to generate related reports.
- In Lesson 3 you will learn how to finish out a course and sessions. You will also learn how to generate related reports.

!! Security access determines if you can add or delete rows. Oftentimes, security access only allows row deletion to happen prior to Save. Corrections after Save can be submitted to the Office of Personnel Services for completion.

Not covered in this course

In this course, we do not cover:

- Setting up and tracking training costs.
- Setting up and tracking training budgets.
- Setting up and tracking training demand.

Lesson Objectives

After completing this lesson, you will be able to:

- Plan and set up the base tables used when creating a course and sessions.
- Create and update a course.
- Create and update a course session.
- Run related reports.

Lesson Topics

In this lesson you will learn about the following topics.

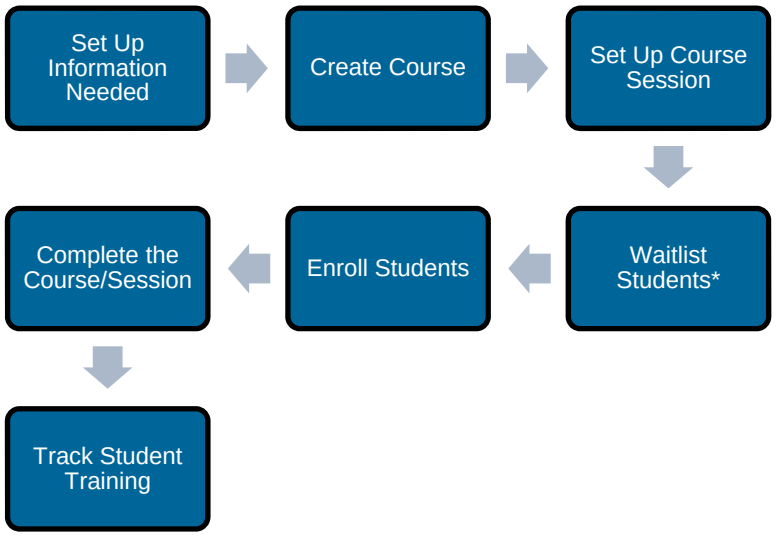


Administer Training Glossary

This training will show you screenshots of the pages. To read about each field on those pages and to know if the State of Kansas uses a specific field, click the "Glossary" link on the page. The link will navigate you to a slide at the end of the training that contains the field definitions for the table you are viewing.

Topic 1: Training Process

SHARP Training Administration allows you to enter training for employees that will follow them no matter what job or agency they work for in the State of Kansas organization.



The process is:

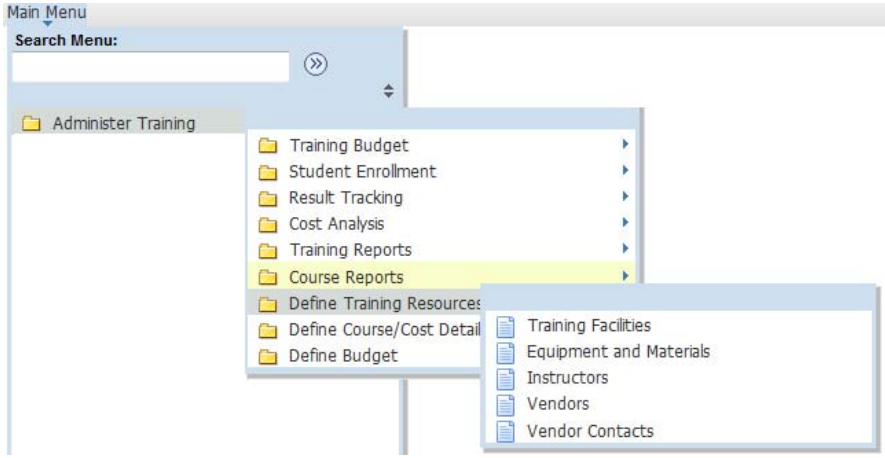
- Plan
- Set up tables, courses, and sessions
- *Waitlist/Enroll Students(optional)
- Complete Course Session
- Track Training

Topic 2: Setting Up Tables



When planning the course session, you will decide when, where, who, and what is needed. When setting up your course and session, you will determine if the codes you need are already set up or if they need to be added.

- Training Facilities
- Schools*
- Instructors
- Vendors & Vendor Contacts
- Equipment & Materials
- Training Programs*



*See specific slides for navigation folder.

Topic 2: Training Facilities

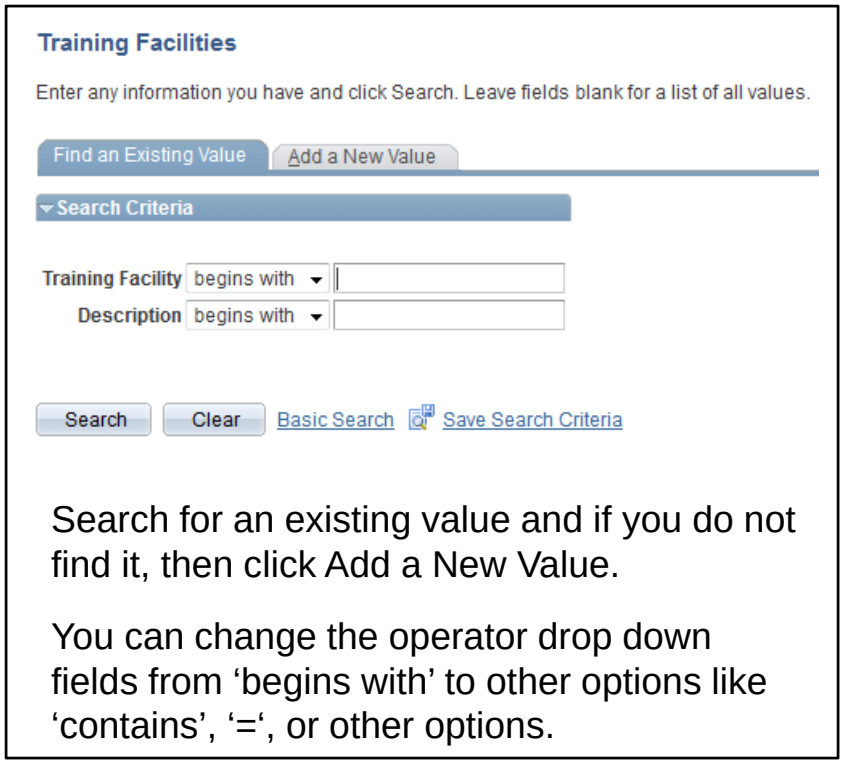


Navigation: Administer Training> Define Training Resources> Training Facilities

This table is used for storing information about a training facility including address, room capacity, cost, contact person, equipment and directions. This facility can be used for a course or a course session.

If the facility does not exist, you will need to enter the facility prior to setting up a course.

Since this table is shared by all agencies, check to see if the training facility has already been entered prior to entering a new one.

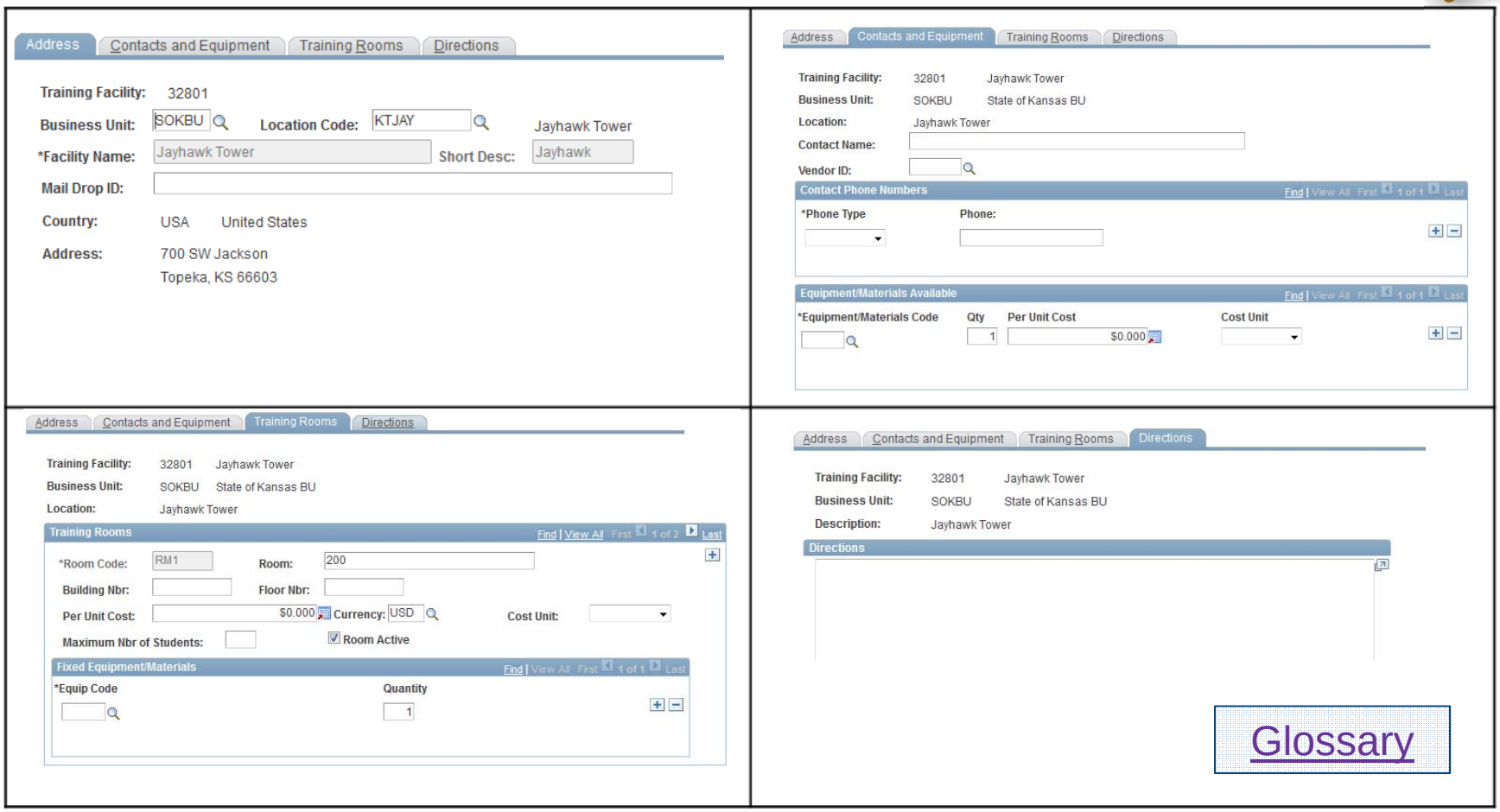


Search for an existing value and if you do not find it, then click Add a New Value.

You can change the operator drop down fields from 'begins with' to other options like 'contains', '=', or other options.

Topic 2: Training Facilities Pages





Topic 2: How to Enter a New Training Facility



Navigation: Administer Training> Define Training Resources> Training Facilities

1. Click ‘Add A New Value’ and enter a new Training Facility code.
2. On the Address page, enter the Facility Name. Add additional information like the Location Code and address.
3. On Contacts and Equipment, you may enter a Vendor ID, Contact Name, Phone numbers, and equipment available at the facility.
4. On Training Rooms, add one or many rooms available in the facility. Include the max occupancy for the room. For each room you can then add pieces of equipment available in that specific room.
5. On Directions, enter directions that can help your students find the training facility.
6. To make updates to this facility, type over the existing text or add a new row where applicable and click 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

Creating Codes : If this is an agency-specific facility be sure to use the Agency Number in the Code

Topic 2: Schools

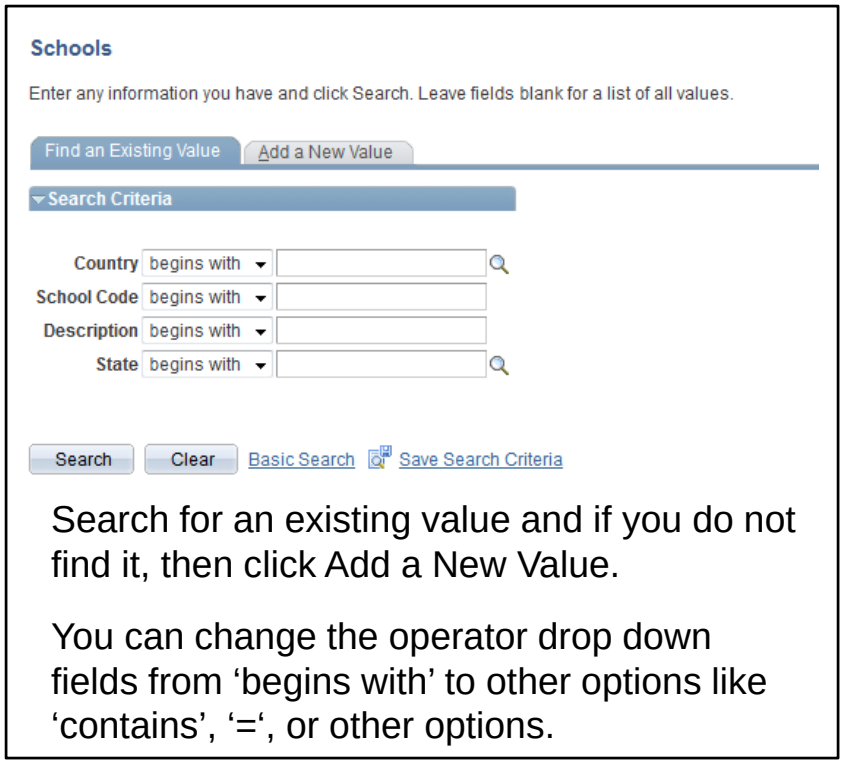


Navigation: Set Up HRMS> Common Definitions>School Information> Schools

The School Table is used to enter colleges, universities and technical schools used to outsource services for conducting training sessions.

If the school code does not exist, you will need to enter it prior to setting up a new course.

Since this table is shared by all agencies, check to see if the training facility has already been entered prior to entering a new one.

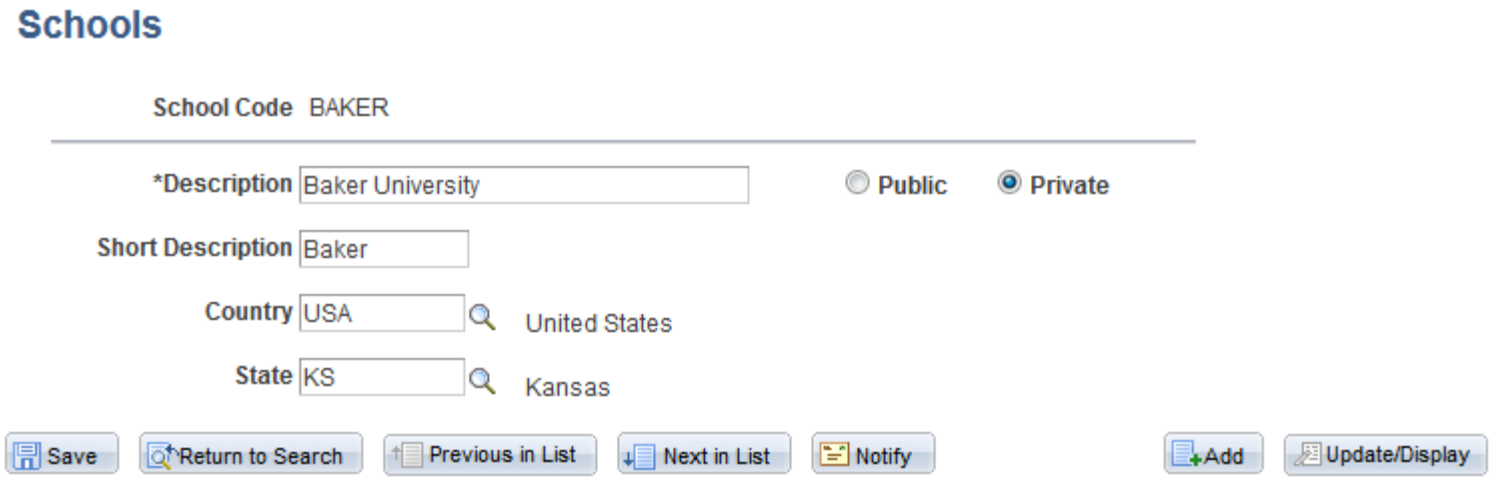


Search for an existing value and if you do not find it, then click Add a New Value.

You can change the operator drop down fields from 'begins with' to other options like 'contains', '=', or other options.

Topic 2: Schools Page





Glossary

Topic 2: How to Enter a New School



Navigation: Set Up HRMS> Common Definitions>School Information> Schools

1. Click ‘Add A New Value’ and enter a new School code.
2. Enter the Description.
3. Choose whether it is a public or private school, enter a Short Description.
4. Enter the County it is located in, and enter the State it is located in.
5. Save
6. To make updates to this school, type over the existing text and click Save.

Required fields are marked with asterisks (*)

Creating Codes : If this is an agency-specific school be sure to use the Agency Number in the Code

Topic 2: Instructors

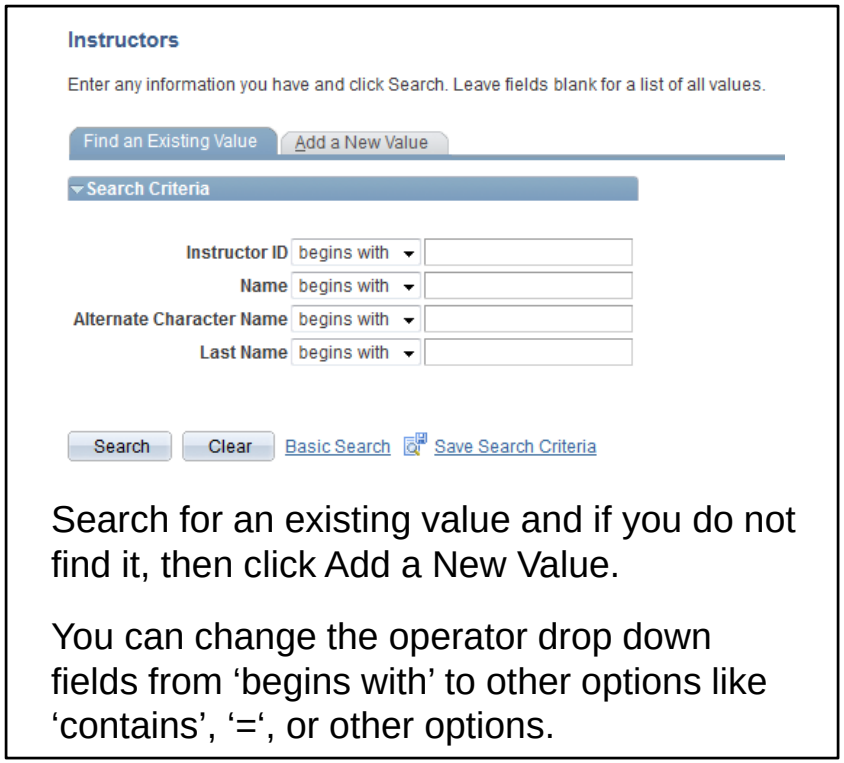


Navigation: Administer Training> Define Training Resources> Instructors

This table is used to store information about instructors and their areas of expertise.

If the Instructor does not exist, you will need to enter them prior to setting up a new course.

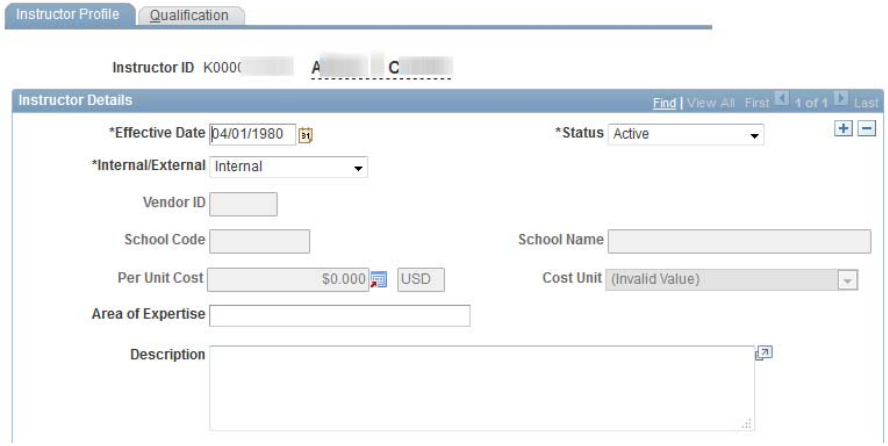
NOTE: Due to the inability to add non-employees to PeopleSoft, only instructors who are employed by the State of Kansas can be entered into this table. The name of an external instructor can be entered directly into the Course Session Table without using an ID. There is also a Vendor called 'SOK Instructors' that can be used

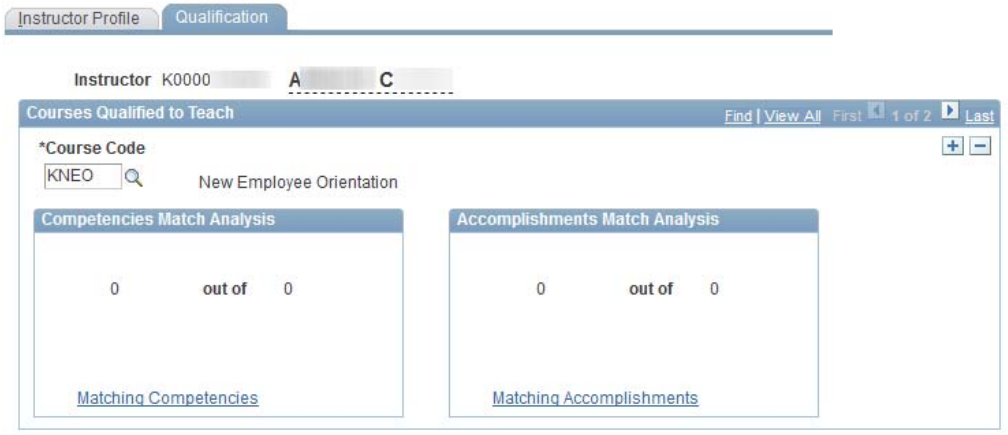


Search for an existing value and if you do not find it, then click Add a New Value.

You can change the operator drop down fields from 'begins with' to other options like 'contains', '=', or other options.

Topic 2: Instructor Pages





Glossary

Topic 2: How to Enter a New Instructor



Navigation: Administer Training> Define Training Resources> Instructors

1. Click ‘Add A New Value’ and enter the instructor’s Employee ID. Click Add.
2. Enter the Effective Date (this should be on or prior to the course start date).
3. Choose the Status of Active and “Internal” for the Internal/External field.
4. Enter their Area of Expertise and Description if desired.
5. On the Qualifications tab, enter the Course Code they will be teaching. Add new rows to add multiple courses to an instructor.
6. Click Save
7. To make updates to this data, add a new effective dated row and enter the changes.

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: Vendors

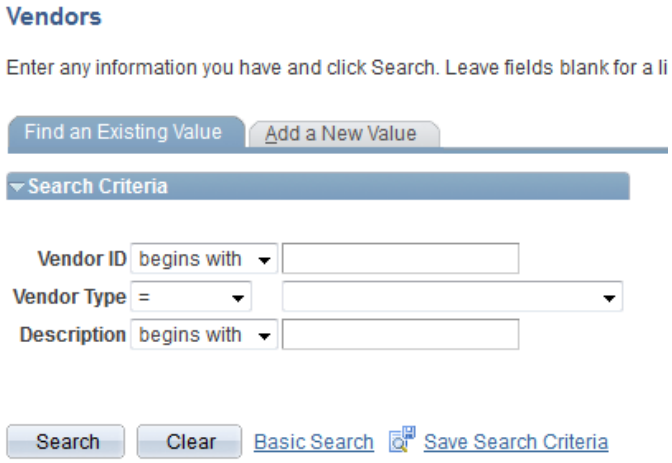


Navigation: Administer Training> Define Training Resources> Vendors

The Vendors table is used for storing vendor information used to outsource services for conducting training sessions.

If the Vendor does not exist, you will need to enter that vendor prior to setting up a new course.

Vendor types include Consulting Firm, Equipment Rental, Facilities Rentals, Financing Fund, Guest Speaker, Other, Outside Instructors, Training Materials, & Training Provider

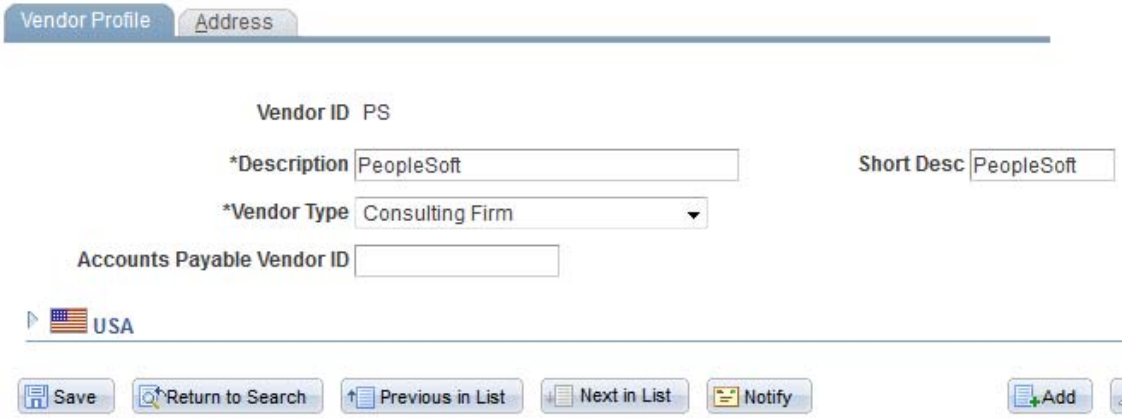


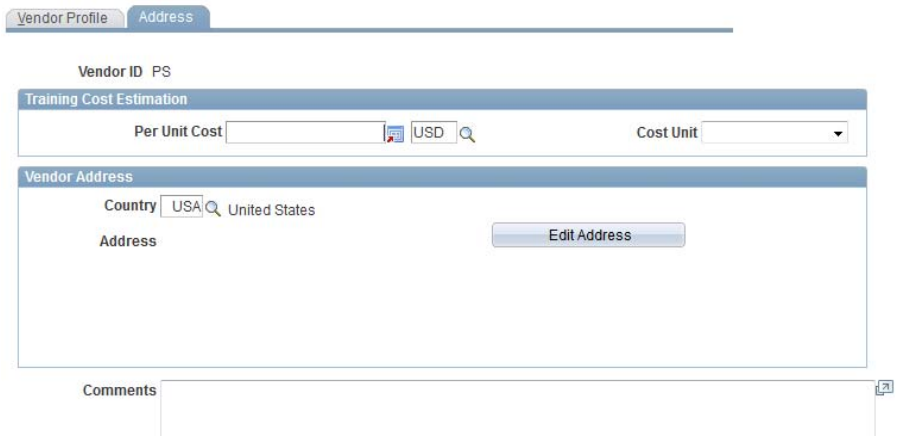
Search for an existing value and if you do not find it, then click Add a New Value.

You can change the operator drop down fields from 'begins with' to other options like 'contains', '=', or other options.

Topic 2: Vendor Pages







Glossary

Topic 2: How to Enter a New Vendor



Navigation: Administer Training> Define Training Resources> Vendors

Required fields are marked with asterisks (*)

1. Click ‘Add A New Value’ and enter a new Vendor ID. Click Add.
2. Enter the Description, Short Description, and choose the Vendor Type.
3. If they have an AP Vendor ID, (optional).
4. On the Address tab, click Edit Address button and enter an address.
5. Enter Comments (optional).
6. Save.
7. To make updates to this vendor, type over the existing text and click Save.

Topic 2: Vendor Contacts

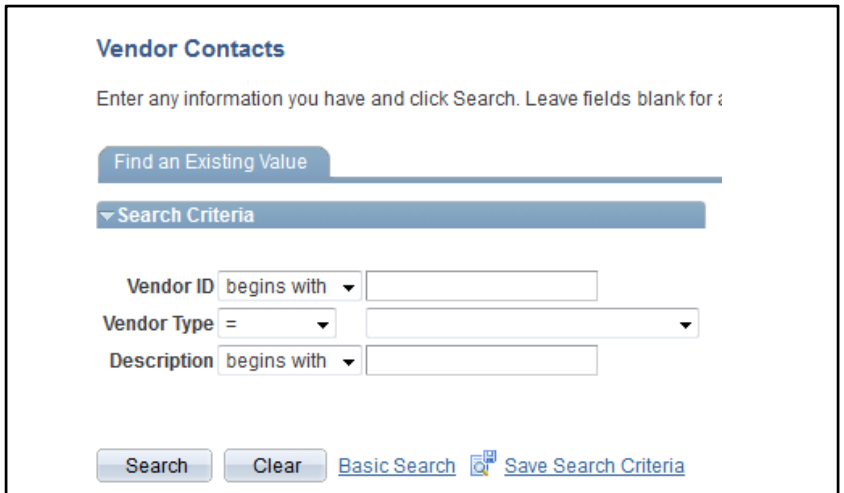
Navigation: Administer Training> Define Training Resources> Vendor Contacts

This table is used to record contact persons for a vendor.

Prerequisite: The Vendor must be set up prior to adding a Vendor Contact.

If the Vendor Contact does not exist, you will need to enter that contact prior to setting up a new course.

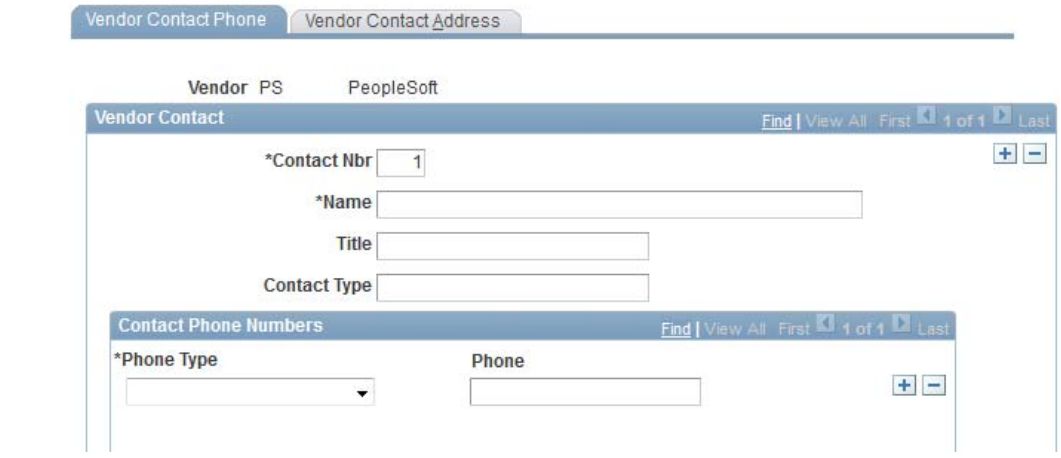
Since tables are shared by all agencies check to see if a code is already in the vendor contact table.

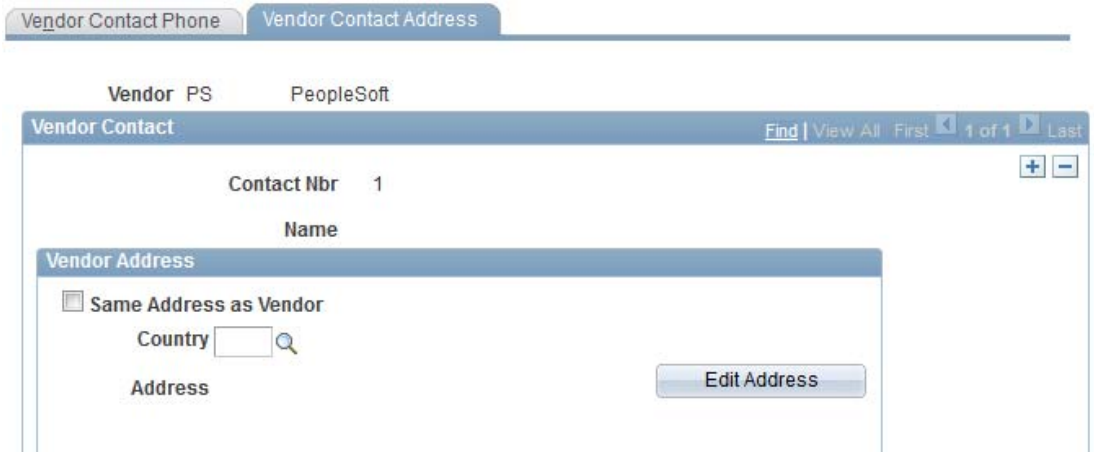


Search for an existing value.

You can change the operator drop down fields from 'begins with' to other options like 'contains', '=', or other options.

Topic 2: Vendor Contacts Pages





Glossary

Topic 2: How to Enter a New Vendor Contact



Navigation: Administer Training> Define Training Resources> Vendor Contacts

1. Add a new row. The Contact Nbr will change to the next sequential number.
2. Add a Name. (required)
3. Add a Title, and Contact Type.
4. Add a Phone Type and Phone number.
5. On the Vendor Contact Address tab, click the checkbox “Same Address as Vendor” if this is the case. Otherwise enter the Country and click the Edit Address button.
6. Complete the address fields and click Ok.
7. Click Save.
8. To make updates to this data, add a new effective dated row and enter the changes.

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: Equipment & Materials



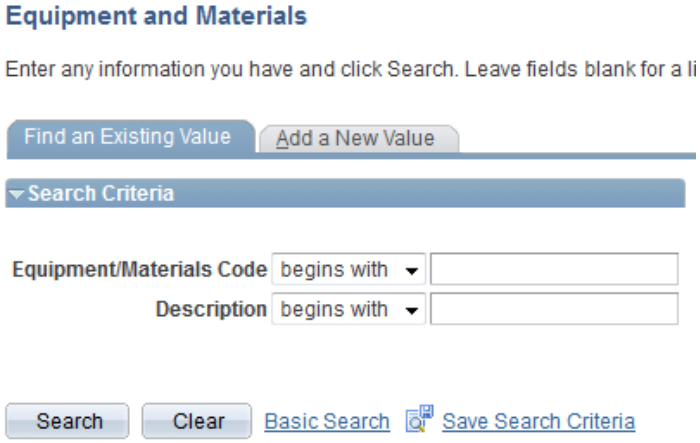
Navigation: Administer Training> Define Training Resources> Equipment and Materials

Equipment codes are used when setting up Courses and Training Facilities.

If the Equipment or Material does not exist, you will need to enter it prior to setting up a new course.

*The equipment table is for general types of equipment. If you have 3 televisions, you only need to add 1 code for a television.

Since tables are shared by all agencies check to see if a code is already in the vendor contact table.



Search for an existing value and if you do not find it, then click Add a New Value.

You can change the operator drop down fields from 'begins with' to other options like 'contains', '=', or other options.

Topic 2: Equipment & Materials Page



Equipment and Materials

Equipment/Materials Code COM

*Equipment Type: Instructor Text

*Description: Computer, Laptop

Short Description: com

Publications

Author

Year Published

ISBN

Glossary

Topic 2: How to Enter New Equipment & Materials



Navigation: Administer Training> Define Training Resources> Equipment and Materials

1. Click ‘Add A New Value’ and enter the new Equipment/Materials Code.
2. Choose the Equipment Type. Examples include Network Connection, Books, Personal Computer, White Board, etc.
3. Enter a Description and a Short Description.
4. For Publications you may also enter the Author, Year Published, and ISBN.
5. Save.
6. To make updates to this vendor, type over the existing text and click Save.

Required fields are marked with asterisks (*)

Creating Codes : First look to see if the generic item is already created. Be specific with new codes.

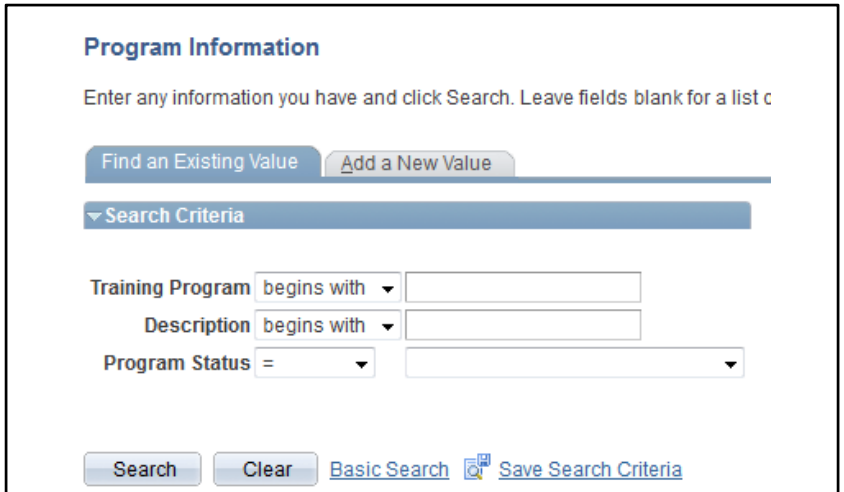
Topic 2: Training Program



Navigation: Administer Training> Define Course/Cost Detail> Program Information

Program Information is used to document a training program that groups courses into logical progressions.

You will enter a new Training Program code whenever a new training program is implemented.



Search for an existing value and if you do not find it, then click Add a New Value.

You can change the operator drop down fields from 'begins with' to other options like 'contains', '=', or other options.

Topic 2: Training Program Page



Program Information

Program Code 92SHRP
*Program Status Active
*Description 9.2 SHARP CBT Training
Short Title 92SHRPTRN
Creation Date 05/08/2017
Revision Date
Business Unit SOKBU State of Kansas BU
Owning Dept ID 1730000000 Department of Administration
Comment List of Maximum Access Training.

Training Program Personalize | Find | View All | First 1 of 1 Last

Sequence	*Course Code	Description	Required
1	92CBT5	9.2 SHARP Administer Training	☑

Glossary

Topic 2: How to Enter a New Training Program



Navigation: Administer Training> Define Course/Cost Detail> Program Information> Training Program Table

1. Click ‘Add A New Value’ and enter the new Program Code.
2. Choose the Program Status.
3. Enter a Description and a Short Description.
4. Enter the Department ID of the department that owns the training.
5. Add a Comment if desired.
6. Add Courses to the Training Program. To add another course press the plus sign.
7. Enter a Sequence Number if they should be completed in a specific order and click on Required if it is a required course.
8. Save
9. To make updates to this session, type over the existing text or add a new row where applicable and click 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

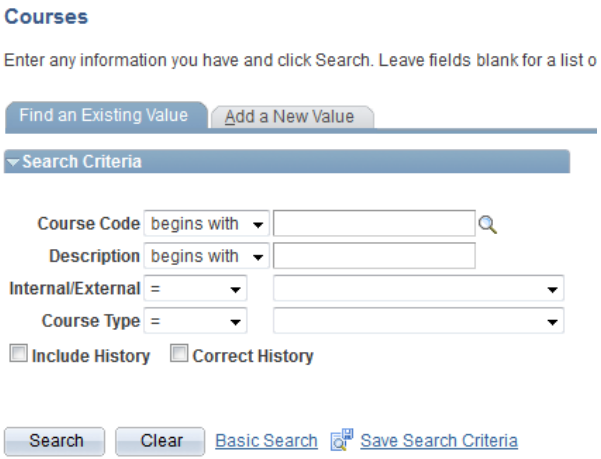
Topic 3: Course Table



Navigation: Administer Training> Define Course/Cost Details> Courses

This is the main table where you will set up your new training course. When a new training program is created and will be delivered by or coordinated by agency staff, you will enter a new course code here.

To distinguish your courses from those given by other agencies, you should begin all new course codes with your agency number for the first three digits of the 6-digit code.

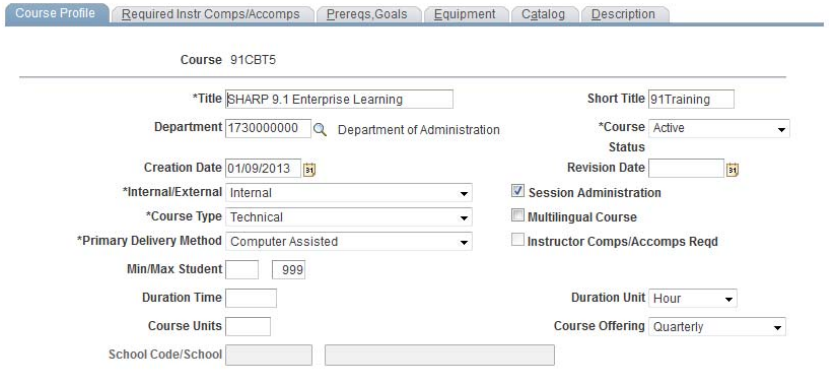


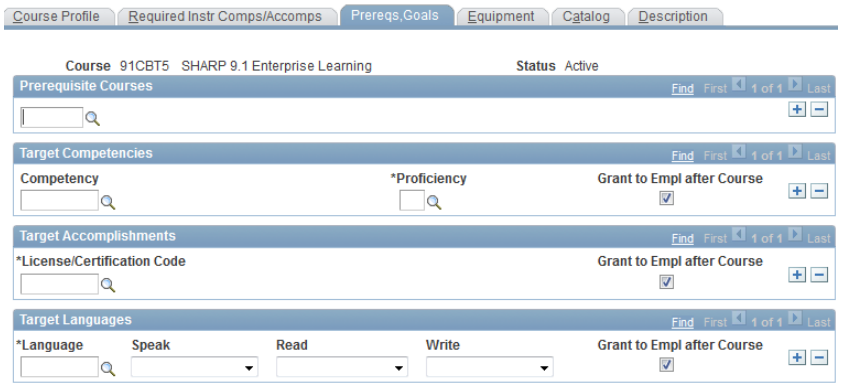
Search for an existing value and if you do not find it, then click Add a New Value.

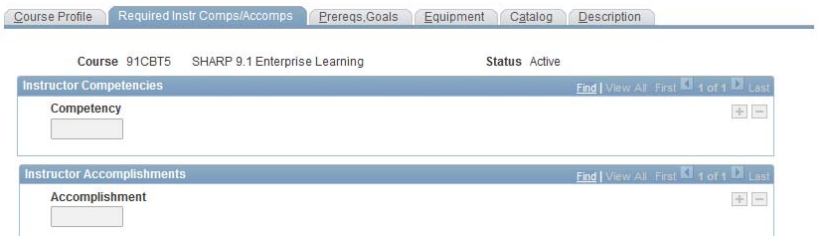
You can change the operator drop down fields from 'begins with' to other options like 'contains', '=', or other options.

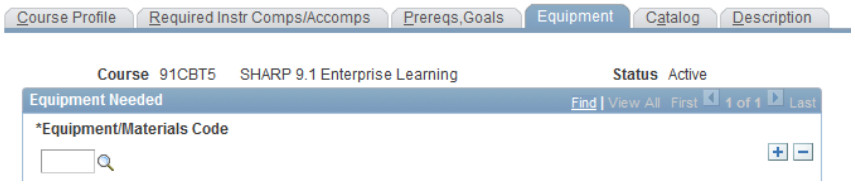
Topic 3: Course Table Pages









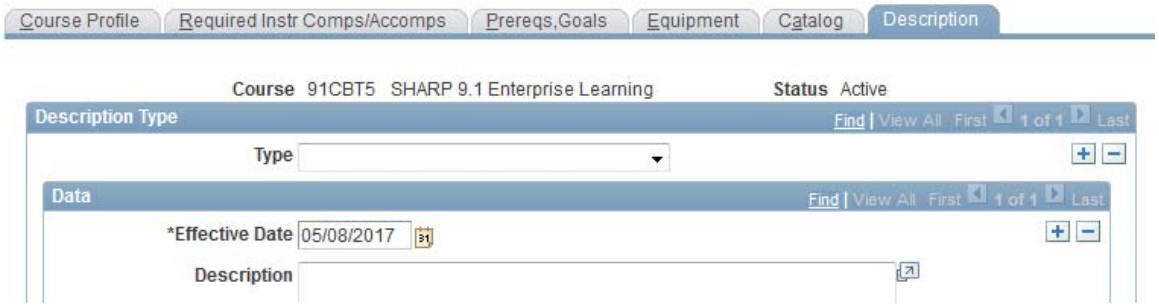


Glossary

Topic 3: Course Table Pages cont.







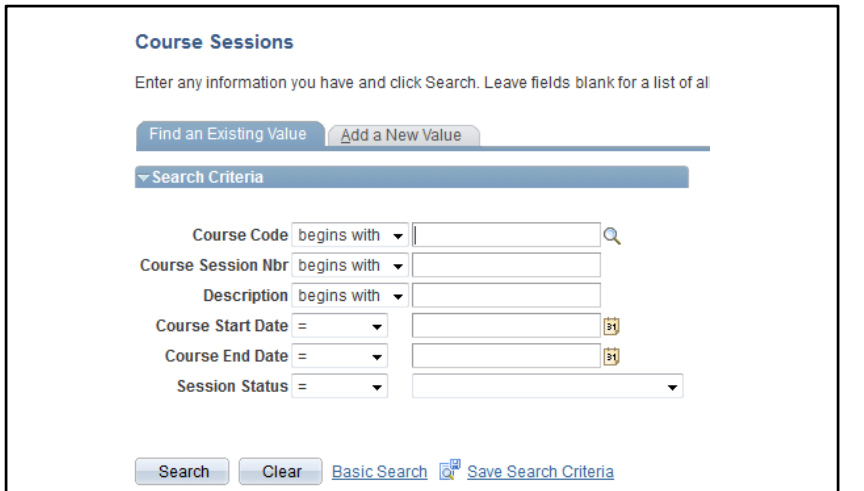
Glossary

Topic 4: Course Session Table

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

The Course Session Table is used to set up scheduled training sessions.

Whenever you set a date and time for a new class at your agency, enter a new Course Session.

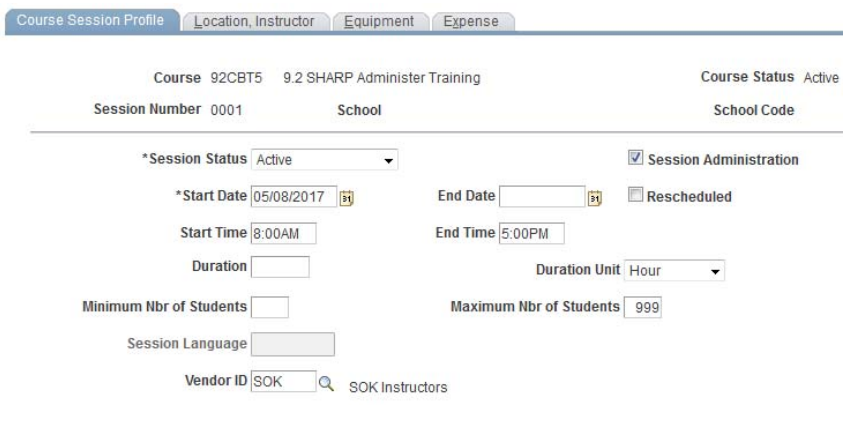


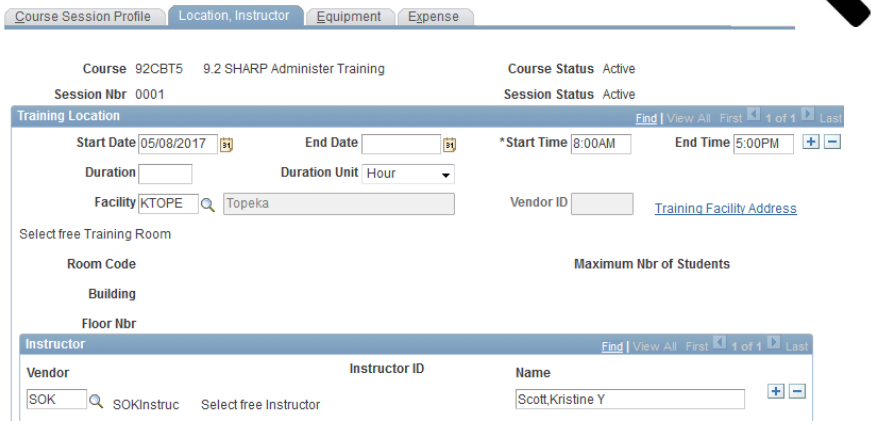
Search for an existing value and if you do not find it, then click Add a New Value.

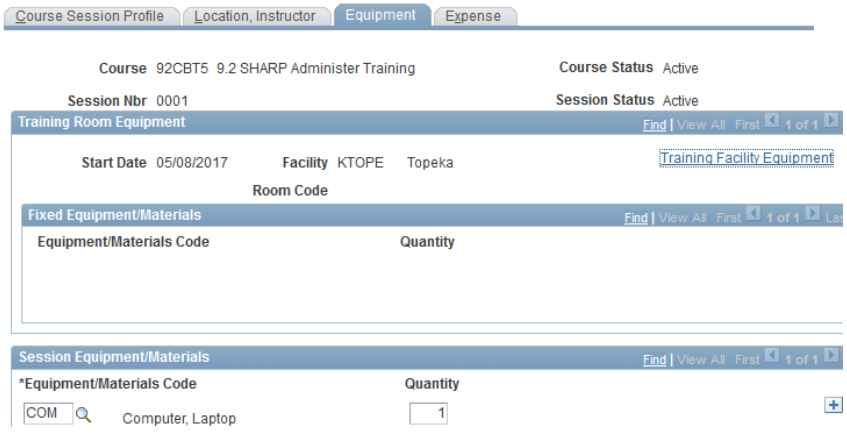
You can change the operator drop down fields from 'begins with' to other options like 'contains', '=', or other options.

Topic 3: Course Session Table Pages











Glossary

Topic 3: Add a New Course



Navigation: Administer Training> Define Course/Cost Details> Courses

1. On the Courses search page, click Add A New Value.
2. Type in your new SHARP course code and click Add.

   **Remember to use your Agency Number as the first 3 digits of your new Course Code.
3. On the Course Profile page, type in the Title, the Short Title and Department.
4. Choose Internal/External (Internal means given by the State of Kansas or by a state agency. External means given by an outside source or school.), Course Type and Primary Delivery Method.
5. Type in the Min/Max Students and Duration (hours).
6. 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

Creating Codes : Agencies should include their 3 digit agency number at the beginning of the course code.

Topic 3: Add a New Course cont.



6. Choose the Course Offering (optional) and proceed to the Prereqs, Goals tab (only if there is a prerequisite course).
7. Type in the prerequisite course code.
8. Move to the Equipment tab and type or search for your equipment.
9. Move to the Description page and type in a description for your course.
10. Move back to the Course Profile page and click on the Session Administration checkbox.
11. Save.
12. To make updates to this session, type over the existing text or add a new row where applicable and click Save.

Topic 4: Add a Course Session



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

1. On the Course Sessions search page, click Add A New Value.
2. Type in your SHARP course code and add your Session Number. Leave blank to increment to the next number. Click Add.
3. On the Course Session Profile page, type in the Start/End Dates and Start/End Times.
4. Go to the Location, Instructor tab. Choose your facility and click the 'Select free Training room' link to find a vacant room. Select the room on the search page and click OK.
5. Type in the Vendor and the vendor's name.
6. Move to the Equipment tab and type or search for your equipment.
7. Press Save.
8. To make updates to this session, type over the existing text or add a new row where applicable and click 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 5: Reports Related to Lesson 1



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

Setup Reports

- Training Facility Schedules (TRN005) – list of scheduled classes at facility
- Training Instructor Schedules (TRN033) – instructor schedule by period specified

Course Reports

- Course Description (TRN023) – report of the description for a course.
- Prerequisite Courses (TRN027) – list of prerequisites for a course
- Course Equipment (TRN025) – list of equipment for a course
- Course Vendors (TRN026) – list of vendors for course

Lesson 1 Summary



The training process is as follows:

- Plan
- Set up tables, courses, and sessions
- Waitlist/Enroll Students
- Complete Course Session
- Track Training



When planning your course, identify and set up any resources such as equipment and materials, instructors, vendors, facilities, schools, and rooms that may be needed.



A course can be created with a single session or with many sessions. It is recommended to always set up courses with Session Administration checked on and with at least one session set up so that the training will show up in all reports. This also provides the opportunity to reuse Course Codes.



Glossary

Glossary - Facilities



- Business Unit – Business Unit is a code used by the entire PeopleSoft database and is not unique to the Facility Table.
- Contact Name – Name of the contact person for this facility.
- Country, Address 1, 2, 3, City, County, State, Postal – Address of the facility.
- Directions – Allows detailed directions to this facility to be recorded.
- Description – The location name.
- Equipment Code, Quantity – Indicates equipment and materials that permanently reside in this room or facility, quantity, and possibly the cost.
- Location – The location name.
- Location Code – The Location Code and Title from the Location Table. Using this code defaults address information and saves data entry time.
- Mail Drop – The building mail address for this training facility.
- Max Number of Students – Maximum number of people that this room will hold.
- Facility Name – The name of the facility and the abbreviated name.
- Room Active – Indicates whether the room is available for training.
- Room Code, Room, Building #, and floor # - Information about the room location
- Short Description - An abbreviation of the description.
- Per Unit Cost, Cost Unit – The cost of the training room.
- Phone Type/Phone – Phone information for the facility contact.
- Training Facility – Unique code associated with the training facility. This code is added by the user when entering a new facility.
- Vendor ID – The Vendor ID displays if the facility is provided by a vendor.

Back to Facilities

Glossary - School



- Country – Country where the school is located.
- Description – A 30 character space for a unique description of this school.
- Public/Private – Indicates whether the school is public or private.
- School Code- Unique code associated with the school. The user will enter this code in the search box.
- Short description- An abbreviation of the description.
- State – State where the school is located.

Back to School

Glossary - Instructors



- Area of Expertise – Instructor's area of expertise.
- Course Code – Courses that the Instructor is authorized to teach
- Description – Additional information about the instructor.
- Effective Date - Date the instructor is entered.
- Instructor ID - Unique code associated with the instructor. This is the employee ID number for internal instructors.
- Internal/External – All instructors entered will be Internal since only State of Kansas employees may be entered on this table.
- Per Unit Cost – The instructor's cost to the agency.
- School Code – School code of the university associated with an External instructor, where applicable.
- Status – Indicates whether the training program is active or inactive.
- Training Program – Courses included in this program, the sequence in which they should be taken, and whether they are required.
- Vendor ID, Competencies Match Analysis, Accomplishments Match Analysis - These functions are delivered by PeopleSoft, but will not be used by the State of Kansas.

Back to Instructors

Glossary - Vendors



- Accounts Payable Vendor ID – This field records the vendor's account number but does not function to generate payments.
- Cost Unit – This field is used to record the unit by which the cost is charged.
- Country, Address 1, Address 2, Address 3, City, County, State, Postal - Enter the vendor's address information in this group of fields.
- Description – The name of the vendor.
- Minority Owned – PeopleSoft includes a checkbox if you wish to track whether a business is minority owned.
- Per Unit Cost – This field is used to record the cost that is associated with using this vendor.
- Short Description - An abbreviation of the description.
- Vendor ID – Unique code that is associated with the vendor. The user will enter this code in the search box.
- Vendor Type - The type of the vendor. Example: Consulting firm or Guest Speaker.
- Comments – User comments

Back to Vendors

Glossary – Vendor Contacts



- Contact # - Contact numbers are automatically assigned as new contacts are added for each vendor.
- Contact Type – Indicates the type of contact. You may enter anything you wish in this box.
- Country, Address 1, 2, 3, City, County, State, Postal - If you checked “The same address as vendor”, address information defaults. If not, you can enter a different address.
- Name – The name of the contact
- Phone Type /Phone – Contact’s phone information.
- Title – Indicates any title that the contact may have.
- Vendor – Unique code and title that is associated with the vendor. This information is set up using the Vendor Table

Back to Vendor Contacts

Glossary – Equipment and Materials



- Author – The person or company who wrote the training material, if applicable.
- Description – 30 character field for a unique description of this piece of equipment.
- Equipment/Materials Code – Unique code associated with this equipment. This code is entered by the user when adding a new course.
- Equipment Type – Equipment must be placed in one of the following categories: Audio/Visual, Books, Building Floor Plans, Equipment, Handout, Instructor Text, LCD Panel, Miscellaneous, Network Connection, Network Hub, Overhead Projector, Personal Computers, Procedure Documentation, Student Text, Supplies, or White Board.
- ISBN – The ISBN number of the book, if applicable.
- Short Description – An abbreviation of the description.
- Year Published - The year the training manual was published, if applicable.

Back to Equipment and Materials

Glossary – Training Program



- Business Unit – Business Unit is a code used by the entire PeopleSoft database and it's not unique to the training program table.
- Comment – open-ended field to enter comments about this training program.
- Creation Date – Date this training program was created.
- Description – 30 character description of this training program.
- Owning Department ID – Department that runs this training program.
- Program Code – Unique code that is associated with the training program. The user will enter this code in the search box.
- Program Status - Indicates whether the training program is active or inactive.
- Revision Date - Date the program was revised.
- Short Title- An abbreviation of the description.
- Training Program – Courses included in this program, the sequence in which they should be taken, and whether they are required.

Back to Training Programs

Glossary – Course & Course Session - 1



- Course: Unique code associated with this course. This code is entered by the user when adding a new course.
- Creation Date – Date this course was created.
- Course Offering – How often the course is offered.
- Course Status – Indicates whether the course is active or inactive.
- Course Type – The type of course, such as Supervisory Training, Continuing Education, Employee Orientation or some other type of course.
- Course Units – This field can be used to record CEU's (Continuing Education Units) or some other credit, as needed.
- Department – Unique 10 digit code that identifies the agency and department responsible for conducting the course.
- Description – Describes the entire course, audience, content, or agenda, depending on the type selected.
- Duration, Duration Unit: These two fields indicate the duration amount and duration unit for this course or each segment.
- Duration Time/ Cost Unit - The duration of the course and the cost unit in which the duration time is measured.
- Equipment/Materials Code – Equipment codes and descriptions for items needed to deliver this course.
- Effective Date – Date the description was updated.
- Expense Meals, Expense Parking: Additional expenses a student will incur. This information is used for calculating tuition reimbursement.
- Facility: The facility code and facility name where each segment will be held. For split sessions, enter this information for each segment.
- Fixed Equipment Code, Quantity: Equipment that remains in the particular room you are using.

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Glossary – Course & Course Session - 2



- Instructor ID, Name: External instructor names can be typed into the name field without using a vendor ID or instructor ID. Additionally, there is a hyperlink which allows you to search for an available internal instructor based upon information in the instructor table.
- Internal/External – Indicates whether the course is administered by the agency (Internal) or by the vendor (External).
- Min/Max Students – Minimum and Maximum number of students allowed for a session of this course.
- Multilingual Course – Indicates whether the course is offered in more than one language.
- Prerequisite Courses – Courses that are prerequisites for taking this course.
- Primary Delivery Method – The method by which the course is taught (instructor, computer, etc.)
- Rescheduled: Indicates whether the session was rescheduled.
- Revision Date – The last date that the course information was revised.
- Room Code, Building, Floor, Maximum # of Students: Room number, building, floor and room capacity for this segment of the session.
- School Code/School – The school code and name display if a school is used to deliver this course.
- Select Free Training Room: This hyperlink takes you to a search function to check which rooms in the facility are free for the dates indicated.
- Session Administration – Indicates whether one or more sessions will be administered by the agency.
- Session Equipment Code, Quantity: The equipment and materials needed for this session. It automatically populates from Course table and can be changed.
- Session Language: Language in which this session is taught. The field defaults to English.
- Session Number: Indicates the session number.

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Glossary – Course & Course Session - 3



- Session Status: Indicates whether the session is active, completed or cancelled
- Short Title – An abbreviation of the Course Title.
- Start/End Dates: Start Date and End Date for this session. If the session is split, multiple rows are used to show the dates, times, and location for each segment.
- Start/End Times: Start Time of the first day, and End Time of the last day. If the session is split, multiple rows are used to show the dates, times, and location for each segment.
- Title – Title indicates a 30 character description for this course.
- Training Facility Address: This hyperlink will pull up the address information for this facility.
- Training Facility Equipment: This hyperlink is provided to look up information on equipment available at the facility as a whole.
- Type – Indicates whether the description is general, audience, content or meant for the agenda.
- Vendor ID: Enter the vendor ID here if this session is conducted by an outside vendor.
- Vendor: This section indicates if the instructor is a vendor or an employee.
- Target Competencies, Target Accomplishments, Target Languages, Catalog Page, Instructor Comps/Accomps Req - These functions are delivered by PeopleSoft, but will not be used by the State of Kansas.

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