



Phoenix End-User Training

MODULE 5: ADMINISTER TRAINING

PARTICIPANT GUIDE

PEOPLESOFT HRMS FOR PUBLIC SECTOR
7
PEOPLESOFT HUMAN RESOURCES
APRIL 2000

HRMS - Human Resources - Administer Training



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Administer Training



Welcome to the Administer Training module! This module contains the tools needed to learn all the concepts and procedures involved in Administer Training.

Goal To acquire the skills and knowledge necessary to perform all the procedures identified in the Administer Training section of the online Library

Participant Objectives At the end of this module you are able to:

1. Enroll students
2. Create waitlists
3. Reschedule students
4. Maintain student training records
5. View an employee's training record
6. Run reports
7. Perform table maintenance
8. Update courses and sessions
9. Navigate through the online Library to locate all other Administer Training procedures

Prerequisite Completion of the Introduction to PeopleSoft module

Outline **Administer Training**

- A. Introduction
- B. Business Process
- C. Concepts
- D. Exercises
- E. Summary and Review

Contents



A. INTRODUCTION0

B. BUSINESS PROCESS.....2

C. CONCEPTS.....3

D. EXERCISES.....5

 Exercise 1 - Add new course sessions (Level 1)6

 Exercise 2 - Record course session enrollment before a session (Level 1).....18

 Exercise 3 - Add students to a course session’s waitlist (Level 1).....23

 Exercise 4 - Move students between course sessions (Level 2)27

 Exercise 5 - Record course session attendance after session is completed (Level 3).....31

 Exercise 6 - Update student training records (Level 2)34

 Exercise 7 - Preview a course session roster (Level 2).....37

 Exercise 8 - View an employee’s training record (Level 2).....40

E. SUMMARY AND REVIEW.....44

MAINTAINING TABLES46

A. INTRODUCTION46

B. BUSINESS PROCESS.....48

C. CONCEPTS.....49

D. EXERCISES.....51

 Exercise 1 - Add a new course (Level 1).....52

 Exercise 2 - Update Instructor Table values (Level 2)59

 Exercise 3 - Add a non-employee instructor to a training course (Level 2).....61

 Exercise 4 - Add a new training facility (Level 2).....68

E. SUMMARY AND REVIEW.....74

To the Participant:



In order to complete the exercises in this participant guide, your Instructor will assign you a two-digit number to use in the place of variables used throughout the guide. The training database that this guide works with was designed to be used by multiple users at the same time, very much like the real database you will be using back at your job.

Record the number your Instructor assigns you to use in your participant guide:	
XX	

Your instructor will assign each participant a two-digit number. This will be used to replace **XX** in your participant guide. You will be the only one in your class to use this two-digit number.

Managing Course Sessions

A. Introduction

<p>Activity</p>  <p>LECTURE</p>	<p>Materials</p>  <p>GUIDE</p>  <p>LIBRARY</p>
---	---

<p>Step 1</p>	<p>Goal: To acquire the skills and knowledge necessary to perform all the procedures related to managing course sessions. These procedures are identified in the Administer Training section of the online Library.</p> <p>Objectives:</p> <ol style="list-style-type: none"> 1. Add course sessions 2. Record enrollment information before a course session 3. Add students to a course waiting list 4. Move students between course sessions 5. Record attendance after a session has been completed 6. Update student training records 7. Preview a course session roster 8. View an employee's training record 9. Navigate through the online Library to locate all other Administer Training procedures
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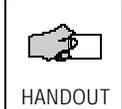
<p>Step 2</p>	<p>Materials:</p> <p>Participant Guide, online Library, PeopleSoft</p>
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Introduction (continued)

Step 3	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>PHOENIX PROGRAM HUMAN RESOURCES PROCESSES</i> <i>Administer Training</i> <i>Introduction</i></p>
Expected Results:	The Administer Training Introduction section displays in the online Library.

Step 4	<p>Select the introduction section to view the available topics for Managing Course Sessions in Administer Training.</p> <p style="text-align: center;">Note: Not all topics listed in the online Library are covered in class. Successfully completing this module of selected topics provides you the skills and knowledge necessary to describe concepts, record data, view information, and generate reports relating to Administer Training.</p>
Expected Results:	An understanding of the information available in the online Library for managing course sessions in the Phoenix Administer Training module

B. Business Process

<p>Activity</p>  <p>LECTURE</p>	<p>Materials</p>  <p>GUIDE</p>  <p>HANDOUT</p>
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<p>Step 1</p>	<p>Discuss the relevant business processes:</p> <ul style="list-style-type: none"> TRN0860 - Add/Update Table Values – Course Session Table TRN0100 - Record Course Session Enrollment, Before or During a Session TRN0200 - Course Waiting List TRN0400 - Express Rescheduling TRN0110 - Record Course Session Attendance, After Session is Completed TRN0600 - Add/Update Student Training Information HR0708 - GEMS Training History Display
<p>Expected Results:</p>	<p>The new business processes are identified and understood</p>

C. Concepts

<p>Activity</p>  <p>LECTURE</p>	<p>Materials</p>  <p>GUIDE</p>  <p>LIBRARY</p>
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<p>Step 1</p>	<p>The main underlying concept for administering training is listed below:</p> <p>Training session administration</p>
<p>Expected Results:</p>	<p>An understanding of the main concept involved in entering data in the administering training system</p>

<p>Step 2</p>	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>PHOENIX PROGRAM HUMAN RESOURCES PROCESSES</i></p> <p style="text-align: center;"><i>Administer Training</i></p> <p style="text-align: center;"><i>Concepts</i></p> <p style="text-align: center;"><i>Training Administration Processing Logic (c)</i></p> <p style="text-align: center;"><i>Training Administration Table Setup (c)</i></p> <p style="text-align: center;"><i>Training Courses and Sessions (c)</i></p> <p style="text-align: center;"><i>Training Course Waitlists (c)</i></p> <p style="text-align: center;"><i>Training Enrollment Status Letters (c)</i></p> <p style="text-align: center;"><i>Training Prerequisites (c)</i></p> <p style="text-align: center;"><i>Training Session Administration (c)</i></p>
<p>Expected Results:</p>	<p>The Concepts section displays in the online Library.</p>

Concepts (continued)

Step 3	Select and read the following concepts in the online Library: <i>PHOENIX PROGRAM HUMAN RESOURCES PROCESSES</i> <i>Administer Training</i> <i>Concepts</i> <i>Training Session Administration (c)</i>
Expected Results:	An overall understanding of training administration

D. Exercises

Activity	Materials		
			

	<p>To prepare you to use Phoenix on the job effectively, there are three levels of complexity in the exercises:</p> <p>Level 1 - Involves one specific procedure explained in the online Library.</p> <p>Level 2 - Involves more complexity and may be a combination of procedures found in the online Library. Directions in the exercise combine steps listed in the online Library and may also combine procedures.</p> <p>Level 3 - Outlines a scenario and does not list the steps. Leaves it up to you to determine how to perform the activity, using the online Library as a reference tool.</p> <p>Managing Course Sessions:</p> <p>Exercise 1 - Add new course sessions (Level 1)</p> <p>Exercise 2 - Record course session enrollment before a session (Level 1)</p> <p>Exercise 3 - Add students to a course session's waitlist (Level 1)</p> <p>Exercise 4 - Move students between course sessions (Level 2)</p> <p>Exercise 5 - Record course session attendance after a session is completed (Level 3)</p> <p>Exercise 6 - Update student training records (Level 2)</p> <p>Exercise 7 - Preview a course session roster (Level 2)</p> <p>Exercise 8 - View an employee's training record (Level 2)</p>
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Exercise 1 - Add new course sessions (Level 1)

Scenario: The Training Director in your company wishes to add two new sessions to the New Employee Orientation course. Your goal is to correctly enter the new course session information into Phoenix.

online Library: *Course Sessions Table (tbl)*

Business Process **TRN0860**

Step 1	From the Table of Contents window in online Library, expand down the following path: <i>PHOENIX PROGRAM HUMAN RESOURCES PROCESSES</i> <i>Administer Training</i> <i>Table Maintenance Procedures</i> <i>Course Sessions Table (tbl)</i>
Expected Results:	The Course Sessions Table (tbl) section displays in the online Library.

Step 2	Read <i>Course Sessions Table (tbl)</i> in the online Library.
Expected Results:	An understanding of how to add or update sessions to the Course Session Table in Phoenix

Step 3	Toggle to PeopleSoft. Logon to PeopleSoft, if necessary.
Expected Results:	The PeopleSoft window displays.

Exercise 1 (continued)

Step 4	Select: Go → Develop Workforce → Administer Training
Expected Results:	The Administer Training window displays.

Step 5	Select: Setup → Course Session Table → Course Session Table 1 (Add)
Expected Results:	A dialog box displays.

Step 6	<p>Enter the following:</p> <p>Course Code: 460001</p> <p>Click: OK</p> <p>The session number defaults to the next highest number not already assigned to this course upon saving.</p>
Expected Results:	The Course Session Table 1 panel displays.

Step 7	<p>Enter or select the following:</p> <p>Start/End Dates: 05/16/2000</p> <p>Start/End Times: 9:00am / 3:00pm</p> <p>Duration: 5 Hours</p>
Expected Results:	Correct data entry

Exercise 1 (continued)

Step 8	Click: Course Session Table 2 to proceed to the Course Session Table 2 panel
Expected Results:	The Course Session Table 2 panel displays.

Step 9	Enter or select the following: Facility Code: 46000A
Expected Results:	Correct data entry

Step 10	Click: Course Session Table 3 to proceed to the Course Session Table 3 panel
Expected Results:	Course Session Table 3 panel displays.

Step 11	Enter or select the following: Instructor ID: 422000 XX (Replace XX with the number assigned to you by your Instructor) Click: OK
Expected Results:	Correct data entry

Exercise 1 (continued)

Step 12	Review data entry for accuracy. Click:  to save Record the session number _____
Expected Results:	The new information is saved.

Step 13	Click:  to proceed to the Course Session Table 1 panel
Expected Results:	The Course Session Table 1 panel displays.

Step 14	Click:  to add an additional course session
Expected Results:	A dialog box displays.

Step 15	Enter the following: Course Code: 460001 Click: OK The session number defaults to the next highest number not already assigned to this course upon saving.
Expected Results:	The Course Session Table panel displays.

Exercise 1 (continued)

Step 16	Enter or select the following: Start/End Dates: 05/17/2000 Start/End Times: 9:00am / 3:00pm Duration: 5 Hours
Expected Results:	Correct data entry

Step 17	Click: Course Session Table 2 to proceed to the Course Session Table 2 panel
Expected Results:	The Course Session Table 2 panel displays.

Step 18	Enter or select the following: Facility Code: 46000A
Expected Results:	Correct data entry

Step 19	Click: Course Session Table 3 to proceed to the Course Session Table 3 panel
Expected Results:	The Course Session Table 3 panel displays.

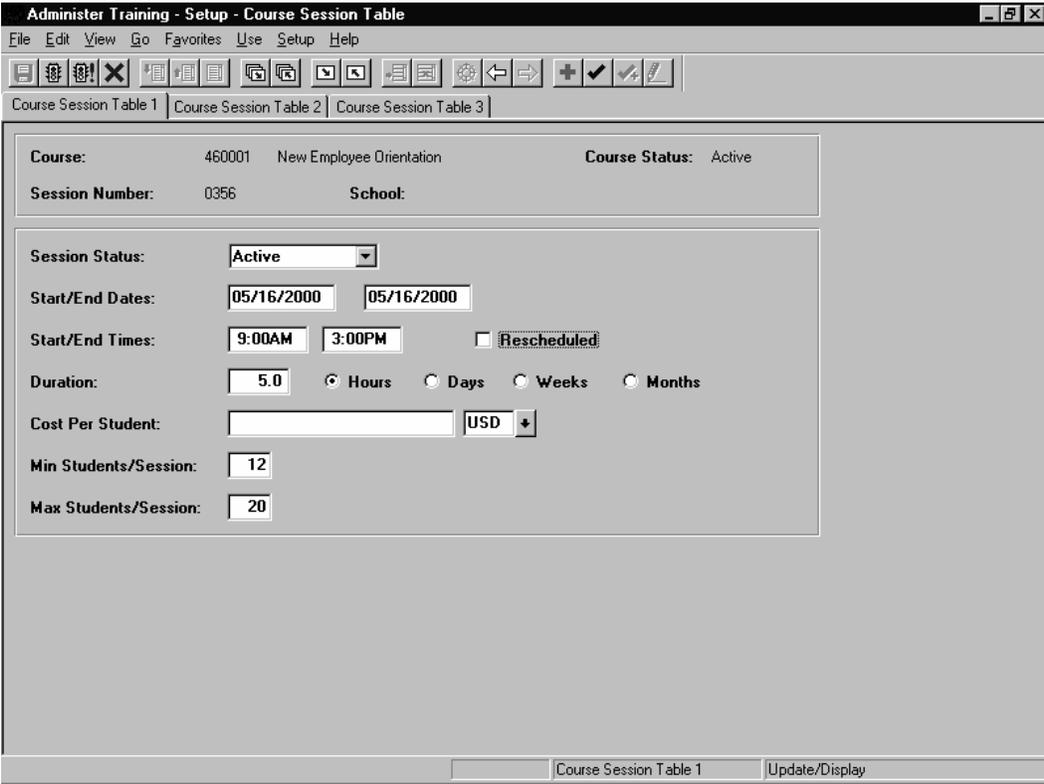
Exercise 1 (continued)

Step 20	<p>Enter or select the following:</p> <p>Instructor ID: 422000XX</p> <p>(Replace XX with the number assigned to you by your Instructor)</p> <p>Click: OK</p>
Expected Results:	Correct data entry

Step 21	<p>Review data entry for accuracy. Click:  to save</p> <p>Record the session number _____</p>
Expected Results:	The new information is saved.

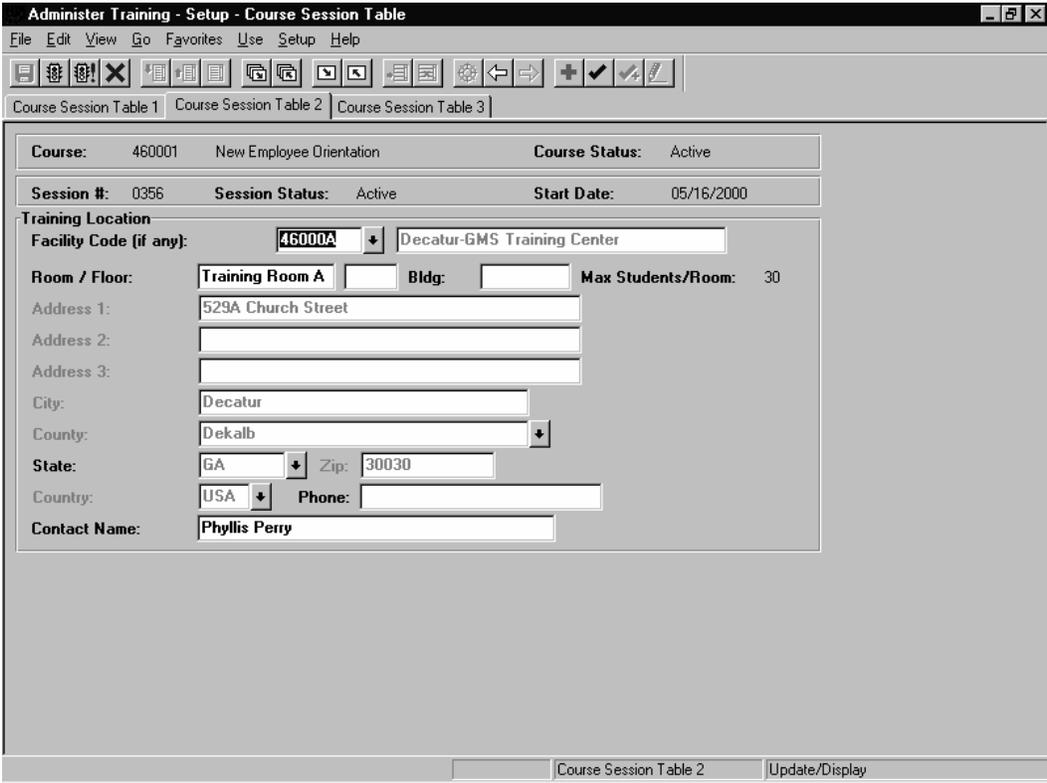
Check your results on the following pages.

Exercise 1 (continued)

<p>Check Results</p>	
<p>Step 22</p>	<p>Select: Setup → Course Session Table → Course Session Table 1</p> <p>Compare your Course Session Table 1 panel for the 05/16/2000 session with the one shown below:</p> 
<p>Expected Results:</p>	<p>The panels match. Continue to next panel. If these elements do not match, review the steps and consult your Instructor.</p>

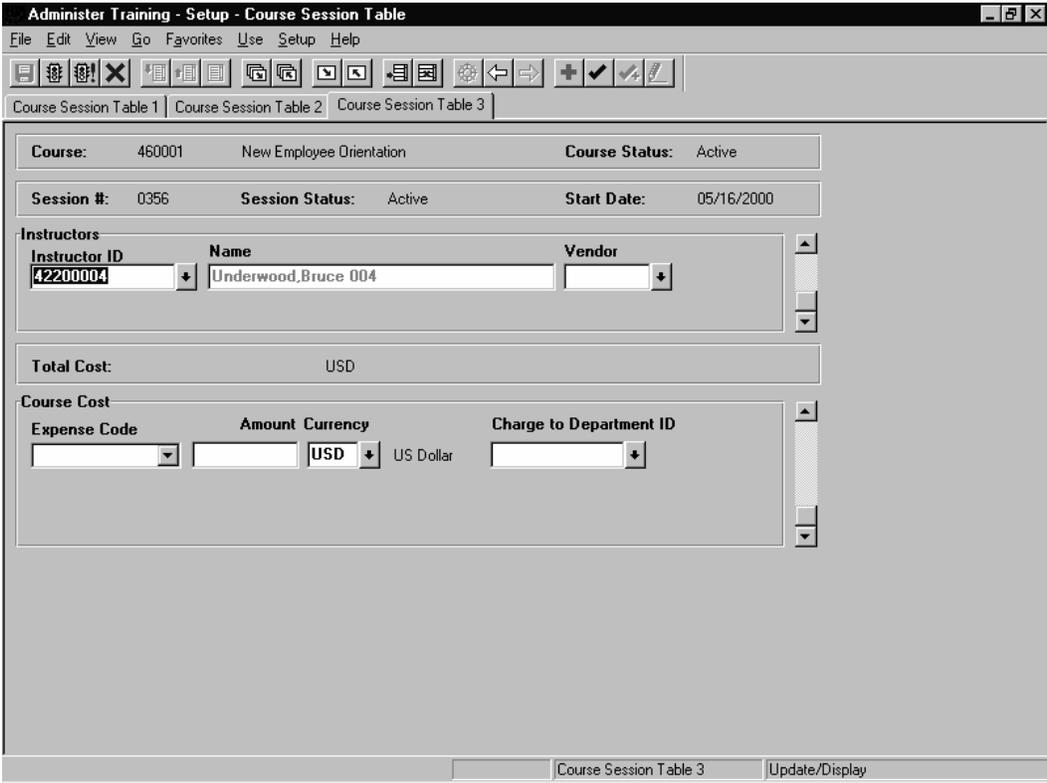
Exercise 1 (continued)

Check Results	
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Step 23	<p>Compare your Course Session Table 2 panel for the 05/16/2000 session with the one shown below:</p> 
Expected Results:	<p>The panel matches. Continue to next panel. If these elements do not match, review the steps and consult your Instructor.</p>

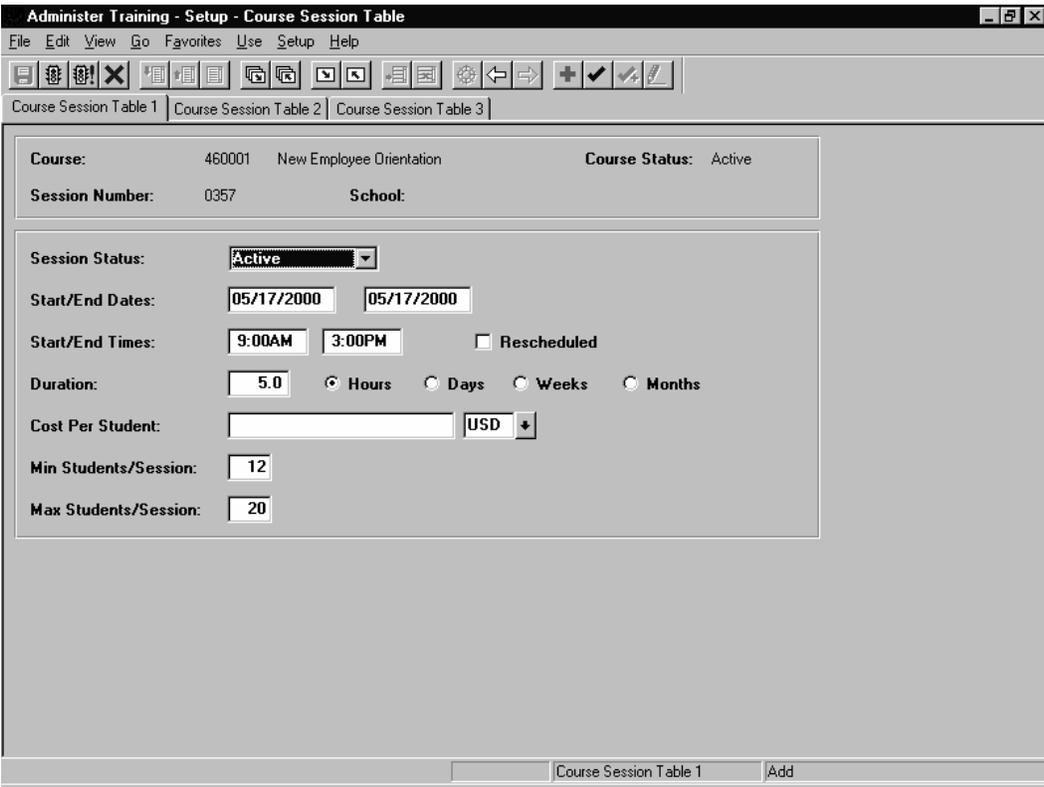
Exercise 1 (continued)

Check Results	
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Step 24	<p>Compare your Course Session Table 3 panel for the 05/16/2000 session with the one shown below:</p> 
Expected Results:	<p>The panels match. Continue to next panel. If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 1 (continued)

Check Results	
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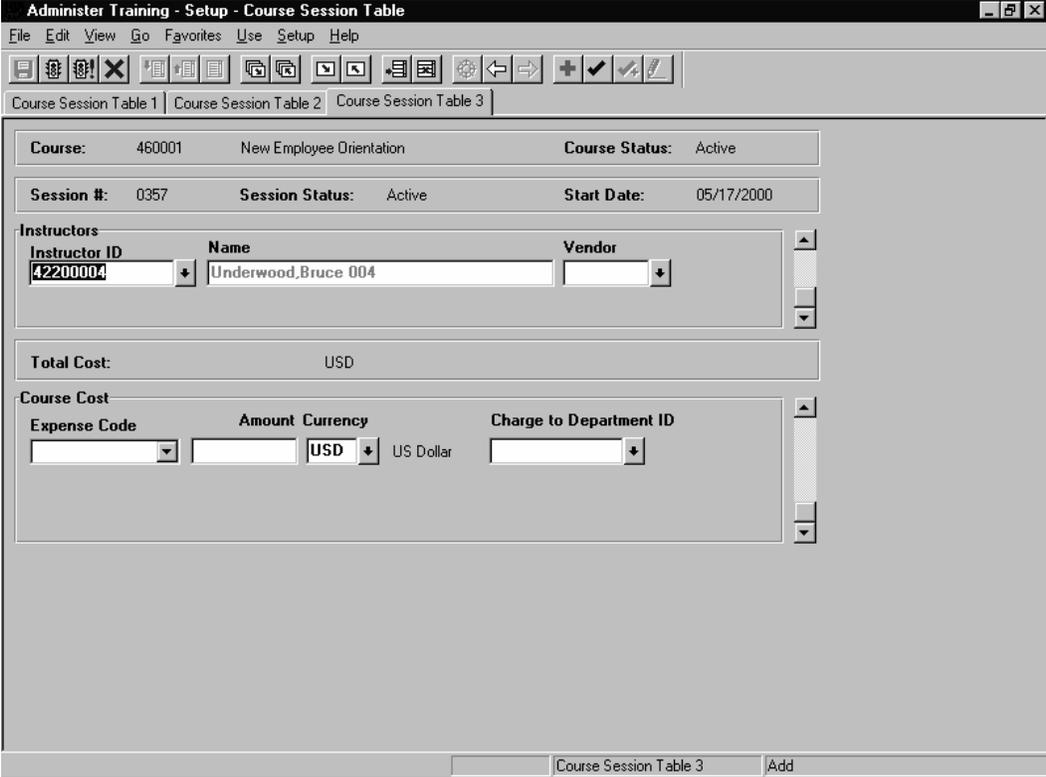
Step 25	<p>Compare your Course Session Table 1 panel for the 05/17/2000 session with the one shown below:</p> 
Expected Results:	<p>The panels match. Continue to next panel. If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 1 (continued)

Check Results	
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Step 26	<p>Compare your Course Session Table 2 panel for the 05/17/2000 session with the one shown below:</p>
Expected Results:	<p>The panels match. Continue to next panel. If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 1 (continued)

<p>Check Results</p>	
<p>Step 27</p>	<p>Compare your Course Session Table 3 panel for the 05/17/2000 session with the one shown below:</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 2 - Record course session enrollment before a session (Level 1)

Scenario: Several employees need to be enrolled into the June session of the Customer Relations course. Your goal is to enter their enrollment correctly in Phoenix.

online Library: *Before or During a Session (de)*

Business Process: **TRN0100**

Step 1	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>PHOENIX PROGRAM HUMAN RESOURCES PROCESSES</i> <i>Administer Training</i> <i>Data Entry Procedures</i> <i>Course Sessions, Student Enrollment, Manual</i> <i>Before or During a Session (de)</i></p>
Expected Results:	The Before or During a Session (<i>de</i>) section displays in the online Library.

Step 2	Read <i>Before or During a Session (de)</i> in the online Library.
Expected Results:	An understanding of how to enroll an employee in a training course in Phoenix

Step 3	<p>Toggle to PeopleSoft.</p> <p>Logon to PeopleSoft, if necessary.</p>
Expected Results:	The PeopleSoft window displays.

Exercise 2 (continued)

Step 4	Select: Go → Develop Workforce → Administer Training
Expected Results:	The Administer Training window displays.

Step 5	Select: Use → Course Session Enrollment
Expected Results:	A dialog box displays.

Step 6	<p>Enter the following:</p> <p>Course Code: 427001</p> <p>Course Session Nbr: 02XX</p> <p>(Replace XX with the number assigned to you by your Instructor.)</p> <p>Click: OK</p>
Expected Results:	The Course Session Enrollment panel displays.

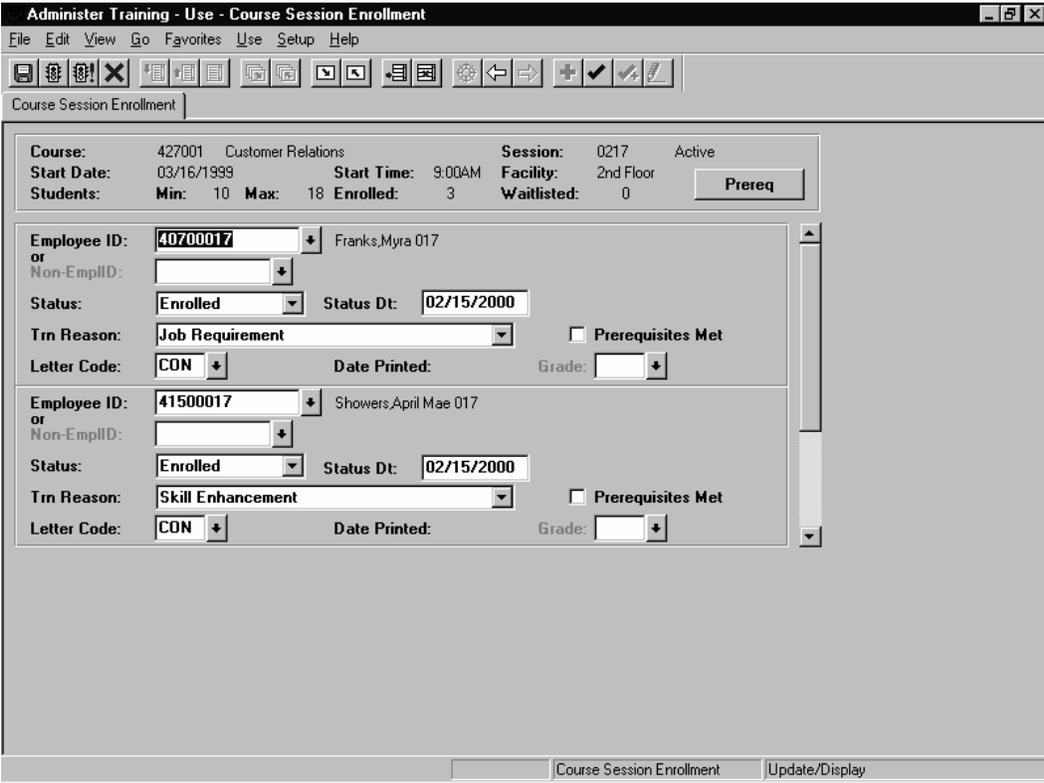
Exercise 2 (continued)

<p>Step 7</p>	<p>Enter or select the following:</p> <p>(Replace XX with the number assigned to you by your Instructor.)</p> <p>Employee ID: 407000XX Status: Enrolled Trn Reason: Job Requirement</p> <p>Click:  to insert a row</p> <p>Employee ID: 419000XX Status: Enrolled Trn Reason: Requalification</p> <p>Click:  to insert a row</p> <p>Employee ID: 415000XX Status: Enrolled Trn Reason: Skill Enhancement</p>
<p>Expected Results:</p>	<p>Correct data entry</p>

<p>Step 8</p>	<p>Review data entry for accuracy. Click:  to save</p>
<p>Expected Results:</p>	<p>The new information is saved.</p>

Check your results on the following pages.

Exercise 2 (continued)

<p>Check Results</p>	
<p>Step 9</p>	<p>Select: Use → Course Session Enrollment</p> <p>Compare your Course Session Enrollment panel to the panel shown below:</p>  <p>Expected Results: The panel matches. Continue to the next panel. If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 2 (continued)

Check Results	
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Step 10	<p>Click on the scroll bar to view additional rows on the panel.</p>
Expected Results:	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 3 - Add students to a course session's waitlist (Level 1)

Scenario: Several people are requesting enrollment into the Georgia PMP Training course. This course is presently full. Your goal is to add these students to a waitlist for this course.

online Library: *Course Waiting List (de)*

Business Process: **TRN0200**

Step 1	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>PHOENIX PROGRAM HUMAN RESOURCES PROCESSES</i> <i>Administer Training</i> <i>Data Entry Procedures</i> <i>Course Waiting List (de)</i></p>
Expected Results:	The Course Waiting List (de) section displays in the online Library.

Step 2	Read <i>Course Waiting List (de)</i> in the online Library.
Expected Results:	An understanding of how to add or update course waiting lists in Phoenix

Step 3	<p>Toggle to PeopleSoft.</p> <p>Logon to PeopleSoft, if necessary.</p>
Expected Results:	The PeopleSoft window displays.

Exercise 3 (continued)

Step 4	Select: Go → Develop Workforce → Administer Training
Expected Results:	The Administer Training window displays.

Step 5	Select: Use → Course Waiting List
Expected Results:	A dialog box displays.

Step 6	Enter the following search criteria: Course Code: S50010 Click: OK
Expected Results:	The Course Wait List panel displays.

Exercise 3 (continued)

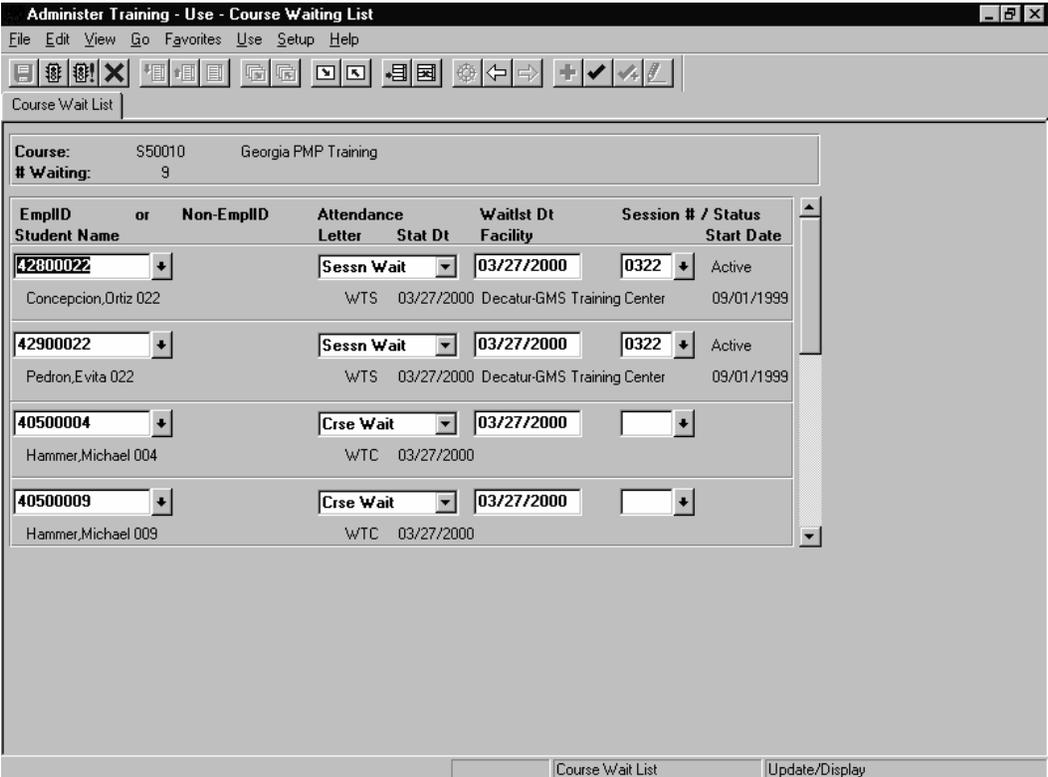
Step 7	<p>Enter the following employee IDs, inserting a new row for each one after the first row has been inserted:</p> <table border="1" data-bbox="373 441 1144 640"> <thead> <tr> <th><u>ID#</u></th> <th><u>Name</u></th> <th><u>Status</u></th> <th><u>Session</u></th> </tr> </thead> <tbody> <tr> <td>405000XX</td> <td>Mike Hammer</td> <td>Crse Wait</td> <td></td> </tr> <tr> <td>411000XX</td> <td>Joe Lee</td> <td>Crse Wait</td> <td></td> </tr> <tr> <td>428000XX</td> <td>Ortiz Concepcion</td> <td>Sessn Wait</td> <td>02XX</td> </tr> <tr> <td>429000XX</td> <td>Evita Pedron</td> <td>Sessn Wait</td> <td>03XX</td> </tr> </tbody> </table> <p>(Replace XX with the number assigned to you by your Instructor.)</p>	<u>ID#</u>	<u>Name</u>	<u>Status</u>	<u>Session</u>	405000XX	Mike Hammer	Crse Wait		411000XX	Joe Lee	Crse Wait		428000XX	Ortiz Concepcion	Sessn Wait	02XX	429000XX	Evita Pedron	Sessn Wait	03XX
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411000XX	Joe Lee	Crse Wait																			
428000XX	Ortiz Concepcion	Sessn Wait	02XX																		
429000XX	Evita Pedron	Sessn Wait	03XX																		
Expected Results:	Correct data entry																				

Step 8	<p>Review data entry for accuracy. Click:  to save</p>
Expected Results:	The new information is saved.

Check your results on the following page.

Exercise 3 (continued)

Check Results	
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Step 9	<p>Select: Use → Course Waiting List</p> <p>Compare your Course Wait List panel to the panel shown below:</p>  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>EmplID Student Name</th> <th>or Non-EmplID</th> <th>Attendance Letter</th> <th>Waitlist Dt Stat Dt</th> <th>Facility</th> <th>Session # / Status</th> <th>Start Date</th> </tr> </thead> <tbody> <tr> <td>42800022 Concepcion,Ortiz 022</td> <td></td> <td>Sessn Wait</td> <td>03/27/2000</td> <td>Decatur-GMS Training Center</td> <td>0322 Active</td> <td>09/01/1999</td> </tr> <tr> <td>42900022 Pedron,E,vita 022</td> <td></td> <td>Sessn Wait</td> <td>03/27/2000</td> <td>Decatur-GMS Training Center</td> <td>0322 Active</td> <td>09/01/1999</td> </tr> <tr> <td>40500004 Hammer,Michael 004</td> <td></td> <td>Crse Wait</td> <td>03/27/2000</td> <td>WTC</td> <td></td> <td></td> </tr> <tr> <td>40500009 Hammer,Michael 009</td> <td></td> <td>Crse Wait</td> <td>03/27/2000</td> <td>WTC</td> <td></td> <td></td> </tr> </tbody> </table>	EmplID Student Name	or Non-EmplID	Attendance Letter	Waitlist Dt Stat Dt	Facility	Session # / Status	Start Date	42800022 Concepcion,Ortiz 022		Sessn Wait	03/27/2000	Decatur-GMS Training Center	0322 Active	09/01/1999	42900022 Pedron,E,vita 022		Sessn Wait	03/27/2000	Decatur-GMS Training Center	0322 Active	09/01/1999	40500004 Hammer,Michael 004		Crse Wait	03/27/2000	WTC			40500009 Hammer,Michael 009		Crse Wait	03/27/2000	WTC		
EmplID Student Name	or Non-EmplID	Attendance Letter	Waitlist Dt Stat Dt	Facility	Session # / Status	Start Date																														
42800022 Concepcion,Ortiz 022		Sessn Wait	03/27/2000	Decatur-GMS Training Center	0322 Active	09/01/1999																														
42900022 Pedron,E,vita 022		Sessn Wait	03/27/2000	Decatur-GMS Training Center	0322 Active	09/01/1999																														
40500004 Hammer,Michael 004		Crse Wait	03/27/2000	WTC																																
40500009 Hammer,Michael 009		Crse Wait	03/27/2000	WTC																																
Expected Results:	<p>The panel matches. Congratulations!</p> <p>If these elements do not match, review the steps and consult your Instructor.</p>																																			

Exercise completed.

Exercise 4 - Move students between course sessions (Level 2)

Scenario: The supervisor for Hayley Davidson and Sarah Gallagher has requested that they be moved to the September session of the Georgia PMP Training course (S50010), due to a scheduling conflict. Your goal is to use Phoenix Express Rescheduling to correctly process this request.

online Library: *Express Rescheduling (de)*

Business Process: **TRN0400**

Step 1	Read <i>Express Rescheduling (de)</i> in the online Library.
Expected Results:	An understanding of how to use Express Rescheduling in Phoenix

Step 2	Access the Express Rescheduling panel for course code S50010 .
Expected Results:	The Georgia PMP Training's Express Rescheduling panel displays.

Step 3	<p>Use the scroll bar to locate session 02XX for the following employees and change their enrollment to Session 03XX:</p> <p>Hayley Davidson (ID# 41800000) Session #: 03XX Status: Enrolled</p> <p>Sarah Gallagher (ID# 41900000) Session #: 03XX Status: Enrolled</p> <p>(Replace XX with the number assigned to you by your Instructor.)</p>
Expected Results:	Correct data entry

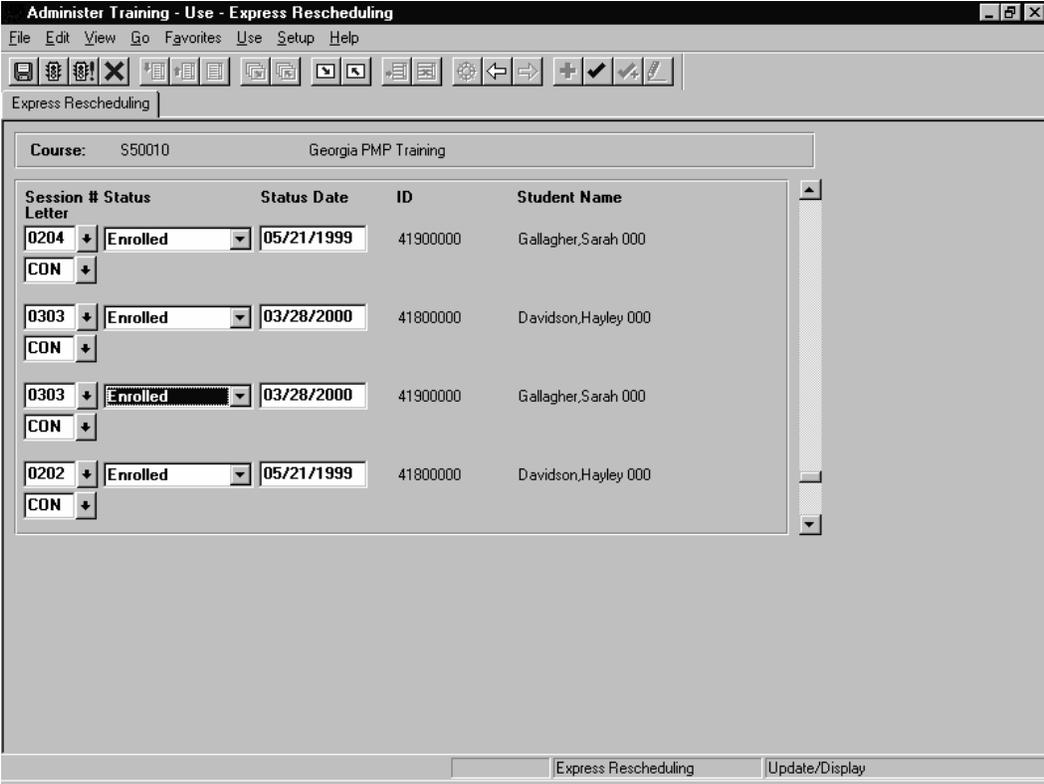
Exercise 4 (continued)

Step 4	Review data entry for accuracy. Click:  to save
Expected Results:	The new information is saved.

Check your results on the following page.

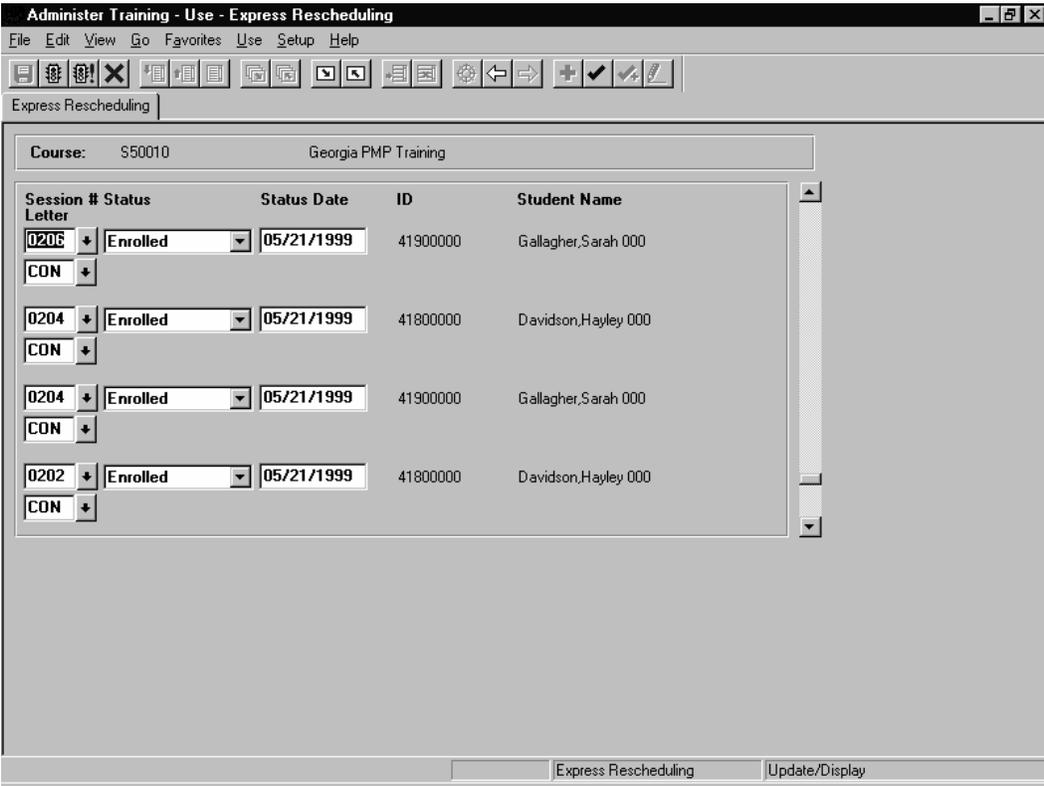
Exercise 4 (continued)

Check Results	
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Step 5	<p>Before you “Save”, your panel should match the one below:</p>  <p>The screenshot shows the following data in the 'Express Rescheduling' window:</p> <table border="1"> <thead> <tr> <th>Session # Letter</th> <th>Status</th> <th>Status Date</th> <th>ID</th> <th>Student Name</th> </tr> </thead> <tbody> <tr> <td>0204</td> <td>Enrolled</td> <td>05/21/1999</td> <td>41900000</td> <td>Gallagher, Sarah 000</td> </tr> <tr> <td>0303</td> <td>Enrolled</td> <td>03/28/2000</td> <td>41800000</td> <td>Davidson, Hayley 000</td> </tr> <tr> <td>0303</td> <td>Enrolled</td> <td>03/28/2000</td> <td>41900000</td> <td>Gallagher, Sarah 000</td> </tr> <tr> <td>0202</td> <td>Enrolled</td> <td>05/21/1999</td> <td>41800000</td> <td>Davidson, Hayley 000</td> </tr> </tbody> </table>	Session # Letter	Status	Status Date	ID	Student Name	0204	Enrolled	05/21/1999	41900000	Gallagher, Sarah 000	0303	Enrolled	03/28/2000	41800000	Davidson, Hayley 000	0303	Enrolled	03/28/2000	41900000	Gallagher, Sarah 000	0202	Enrolled	05/21/1999	41800000	Davidson, Hayley 000
Session # Letter	Status	Status Date	ID	Student Name																						
0204	Enrolled	05/21/1999	41900000	Gallagher, Sarah 000																						
0303	Enrolled	03/28/2000	41800000	Davidson, Hayley 000																						
0303	Enrolled	03/28/2000	41900000	Gallagher, Sarah 000																						
0202	Enrolled	05/21/1999	41800000	Davidson, Hayley 000																						
Expected Results:	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>																									

Exercise 4 (continued)

Check Results	
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Step 6	<p>After you “Save”, the Session # 30XX no longer appears on the panel. Why?</p> 
Expected Results:	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 5 - Record course session attendance after session is completed (Level 3)

Scenario: Nicolas Aguilon (416000XX), Janet Green (403000XX) and Everett Young (424000XX) attended the March session of the New Employee Orientation, but were not previously enrolled. All three of them took this course because it was a job requirement.

Mr. Aguilon and Mr. Young completed the course, but Ms. Green did not. Your goal is to enter this session attendance information into Phoenix.

Course number: 460001
 Session number: XXXX (use session number you recorded in Exercise 1, step 12)

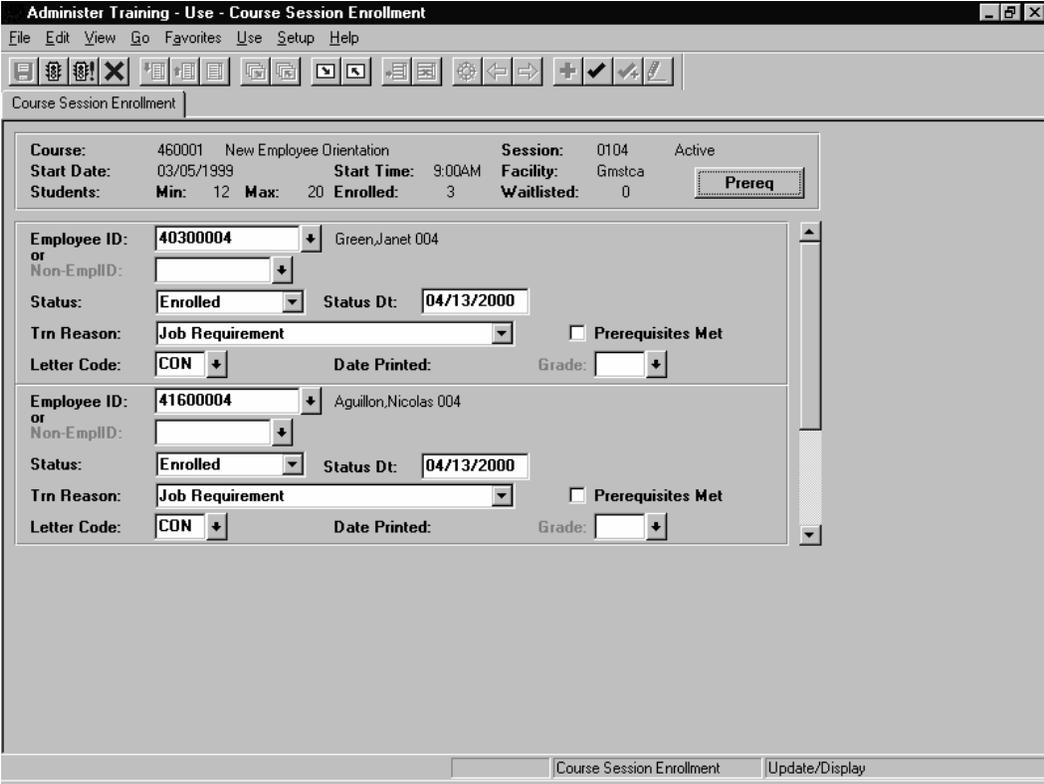
online Library: *After a Session (de)*

Business Process: TRN0110

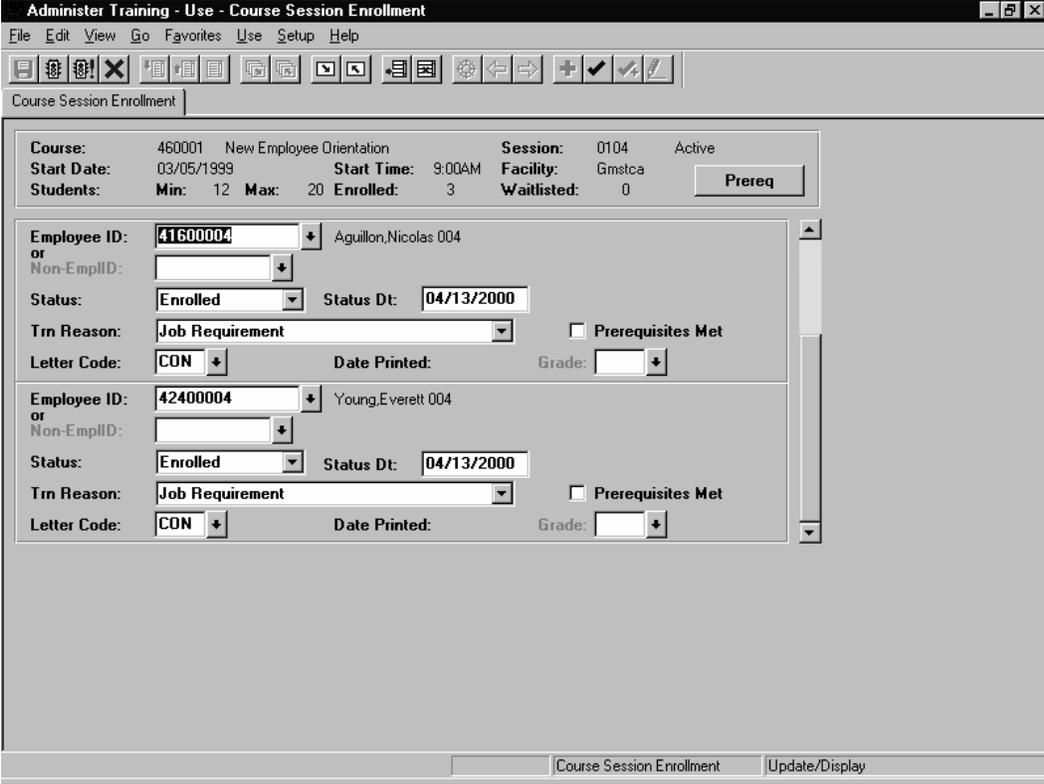
<p>Step 1</p>	<p>Enter the information into Phoenix correctly.</p> <p>Hint: Check the steps in online Library before starting.</p> <p>As you go through the exercise, make a note of the steps using the organizer below:</p> <p>Online Library:</p> <p>Navigation Path:</p> <p>Panel(s):</p> <p>Action(s): Insert Row, Enter Fields, Save, Process, Run Report, View, etc.</p> <p>Additional comments:</p>
<p>Expected Results:</p>	<p>Correct data entry</p>

Check your results on the following pages.

Exercise 5 (continued)

<p>Check Results</p>	
<p>Step 2</p>	<p>Compare your Session Enrollment panel to the panel shown below:</p> 
<p>Expected Results:</p>	<p>The panel matches. Continue to the next panel. If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 5 (continued)

<p>Check Results</p>	
<p>Step 3</p>	<p>Click on the scroll bar to view additional rows of the Course Session Enrollment panel and compare your panel to the panel shown below:</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 6 - Update student training records (Level 2)

Scenario: Mike Hammer has requested that his training record be updated to reflect training courses he has attended. Your goal is to use Phoenix's Student Training to update his records.

online Library: *Student Training Information (de)*

Business Process: **TRN0600**

Step 1	Read <i>Student Training Information (de)</i> in the online Library.
Expected Results:	An understanding of how to add or update student training records in Phoenix.

Step 2	Access the Student Training panel for Mike Hammer (405000 XX) (Replace XX with the number assigned to you by your Instructor.)
Expected Results:	Mike Hammer's Student Training panel displays.

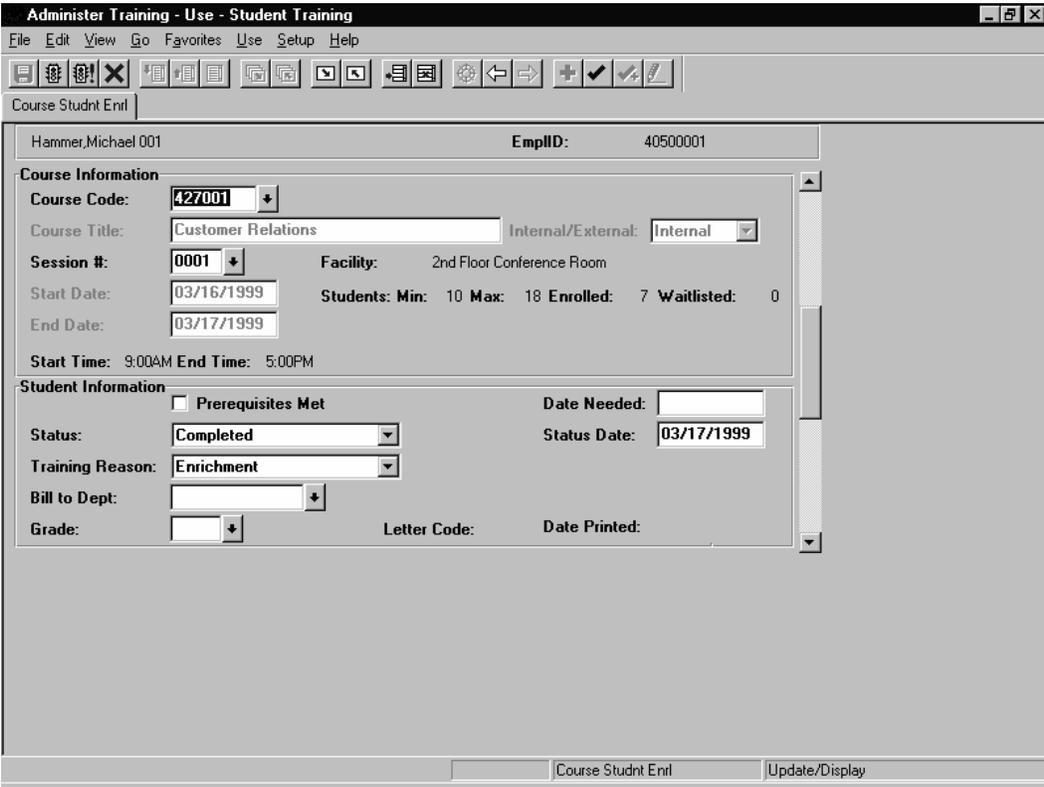
Step 3	Enter or select the following: Course Code: 427001 Session #: 0001 Status: Completed Training Reason: Enrichment Course Title: Auditing for Y2K Conference Internal/External: External Start Date: 04/01/2000 End Date: 04/02/2000 Status: Completed Training Reason: Enrichment
Expected Results:	Correct data entry

Results:	
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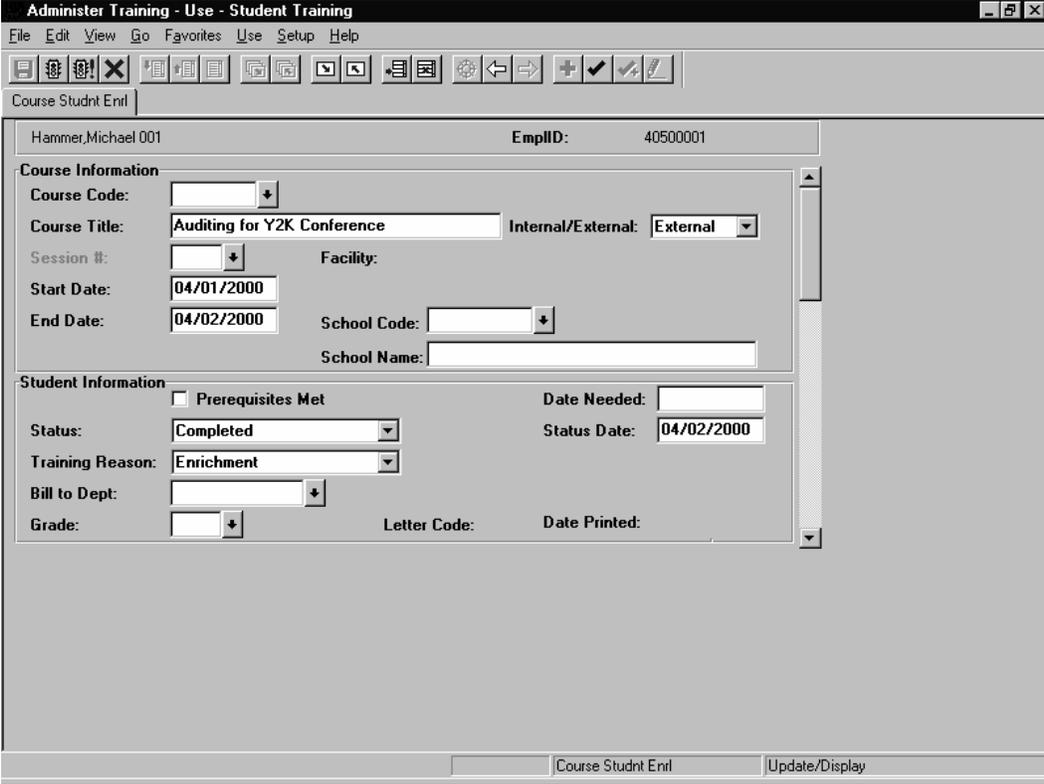
Exercise 6 (continued)

Step 4	Review data entry for accuracy. Click:  to save.
Expected Results:	The new information is saved.

Check Results	
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Step 5	<p>Compare your Student Training panel to the panel shown below:</p> 
Expected Results:	The panel matches. Continue to the next panel. If these elements do not match, review the steps and consult your Instructor.

Exercise 6 (continued)

<p>Check Results</p>	
<p>Step 6</p>	<p>Click on the scroll bar to view additional rows of the Student Training panel and compare your panel to the panel shown below:</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 7 - Preview a course session roster (Level 2)

Scenario: The instructor for the Customer Relations course has requested a roster for the June session. Your goal is to run the course session roster report in Phoenix so that it is ready to be printed.

online Library: *Course Session Roster - TRN002 (rpt)*

Step 1	Read <i>Course Session Roster - TRN002 (rpt)</i> in the online Library.
Expected Results:	An understanding of how to run a report to preview a course session roster report in Phoenix

Step 2	From the Report menu, select Course Session Roster (Add) .
Expected Results:	A dialog box displays for the Run Control ID to be entered.

Step 3	Enter or select the following: Run Control ID: (use your initials—at least two alpha characters)
Expected Results:	The Run Control panel displays for the Course Session Roster Report.

Exercise 7 (continued)

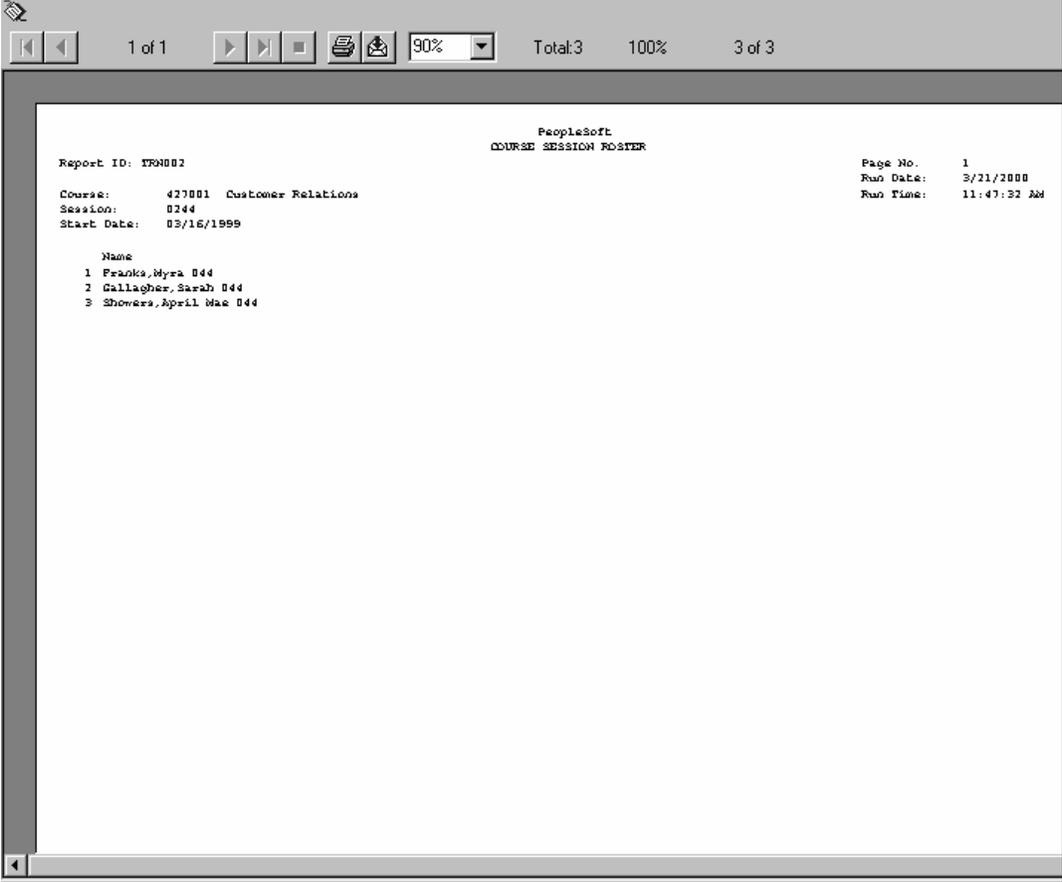
Step 4	<p>Enter or select the following:</p> <p>Course Code: 427001 Session #: 02XX</p> <p>(Replace XX with the number assigned to you by your Instructor.)</p>
Expected Results:	Correct data entry

Step 5	<p>Click:  to run the report</p>
Expected Results:	The Process Scheduler Request dialog box displays.

Step 6	<p>Enter or select the following:</p> <p>Run Location: Client Output Destination: Window</p> <p>Click: OK</p>
Expected Results:	A new window opens to display the Course Session Roster for the course.

Exercise 7 (continued)

Check Results	
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Step 7	<p>Compare your display to the reproduction below (<i>note: the reproduction has been reduced to 70% in order to fit the space</i>)</p> 
Expected Results:	<p>The display matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 8 - View an employee's training record (Level 2)

Scenario: You wish to view the training record of Sarah Gallagher (419000XX). Your goal is to successfully access the GEMS training history information in Phoenix.

online Library: *GEMS Training History Display (i)*

Business Process: **HR0708**

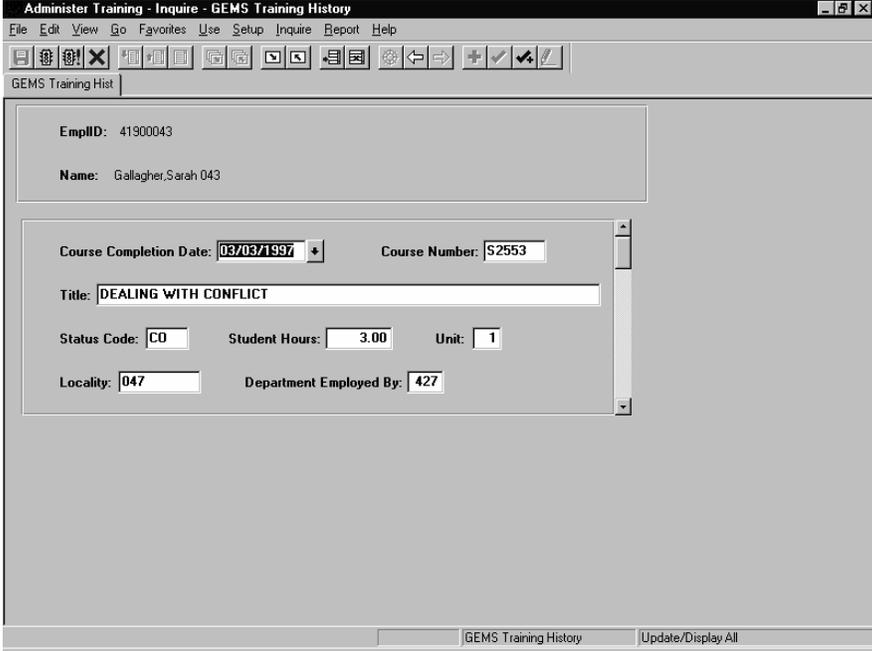
Step 1	Read <i>GEMS Training History Display (i)</i> in the online Library.
Expected Results:	An understanding of how to access and view employee training records in Phoenix

Step 2	Access the GEMS Training History panel for Sarah Gallagher (419000XX).
Expected Results:	Employee's GEMS Training History panel displays.

Check your results on the following page.

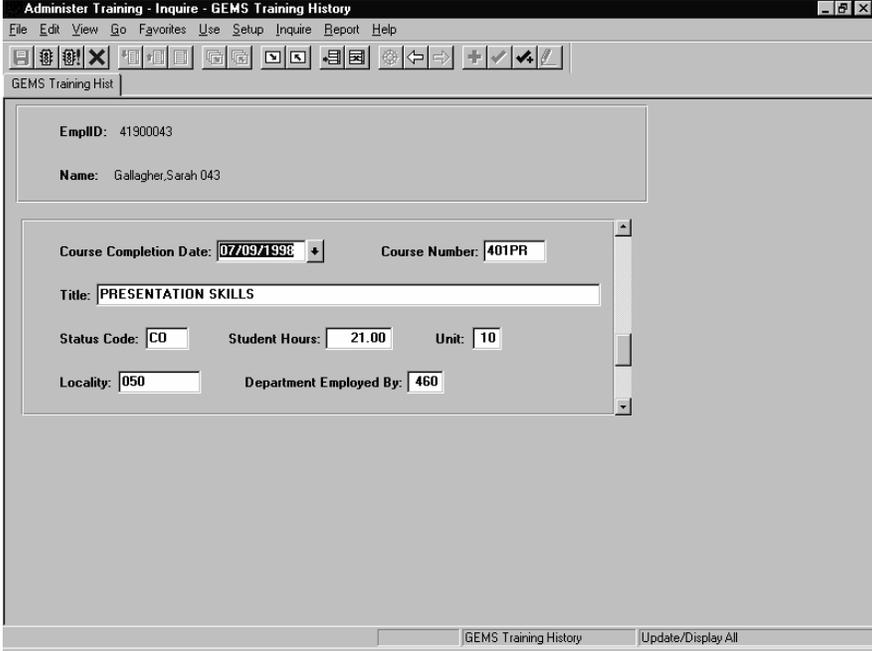
Exercise 8 (continued)

Check Results	
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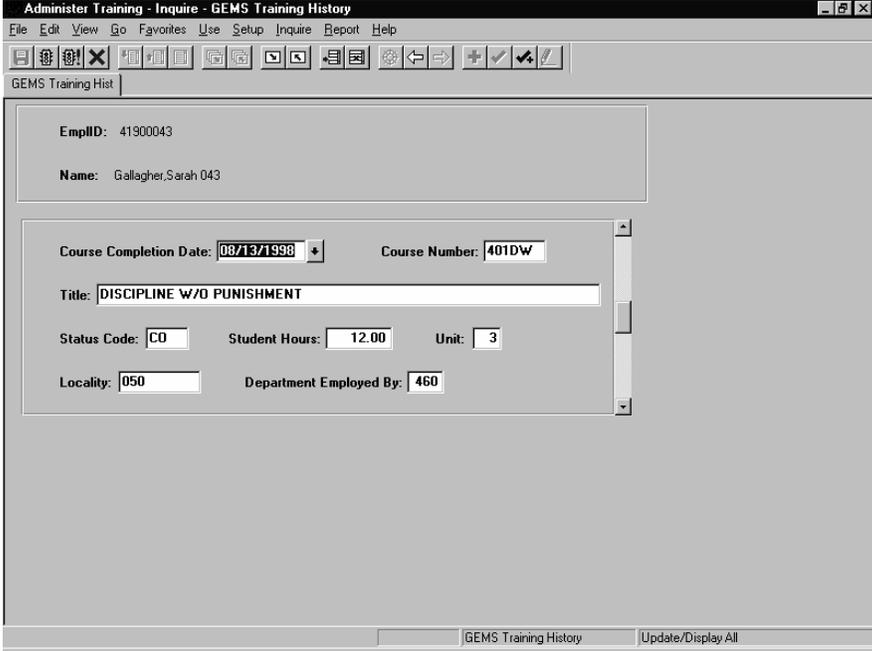
Step 3	<p>Compare your GEMS Training History panel to the panel shown below:</p> 
Expected Results:	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 8 (continued)

Check Results	
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Step 3	<p>Compare your GEMS Training History panel to the panel shown below:</p> 
Expected Results:	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 8 (continued)

<p>Check Results</p>	
<p>Step 3</p>	<p>Compare your GEMS Training History panel to the panel shown below:</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

E. Summary and Review

<p>Activity</p>  <p>LECTURE</p>	<p>Materials</p>  <p>GUIDE</p>  <p>FLIPCHART</p>  <p>REVIEW</p>
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<p>Step 1</p>	<p>Answer the following questions:</p> <ol style="list-style-type: none"> 1. What's the relationship between courses and course sessions? 2. Where in the online Library would you find information on how to enroll students in a training course? 3. What is the function of the "Prereq" button on the Course Session Enrollment panel? 4. What are the steps you need to take in Phoenix to view a course's waiting list? 5. On a course waiting list, what is the difference between the Course Wait and Session Wait designations? 6. What are the differences, if any, between course auto enrollment and express rescheduling? 7. Can a participant be enrolled in a course after the course has been completed? If so, how would you do this? 8. How could you find a list of courses a participant has already taken? 9. List three training reports that can be printed in Phoenix. <p>Hint: Answers can be found in the online Library.</p>
<p>Expected Results:</p>	<p>An understanding of the key concepts for Managing Course Sessions</p>

Summary and Review (continued)

Step 2 (optional)	Participate in a review activity by reviewing the objectives: Objectives: <ol style="list-style-type: none"> 1. Add a course session 2. Record enrollment information before a course session 3. Add students to a course waiting list 4. Automatically enroll waitlisted students 5. Move students between course sessions 6. Record attendance after a session has been completed 7. Update student training records 8. Preview a course session roster 9. View an employee's training record 10. Navigate through the online Library to locate all other Administer Training procedures
Expected Results:	Successful completion of the review activity

Maintaining Tables

A. Introduction

<p>Activity</p>  <p>LECTURE</p>	<p>Materials</p>  <p>GUIDE</p>  <p>LIBRARY</p>
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<p>Step 1</p>	<p>Goal: To have the skills and knowledge necessary to perform the table maintenance procedures identified in the Administer Training section of the online Library.</p> <p>Objectives:</p> <ol style="list-style-type: none"> 1. Add a new course 2. Update Instructor Table values 3. Add a non-employee instructor 4. Add a new training facility 5. Navigate through the online Library to locate all other Administer Training procedures
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<p>Step 2</p>	<p>Materials:</p> <p>Participant Guide, online Library, PeopleSoft</p>
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Introduction (continued)

Step 3	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>PEOPLESFT HUMAN RESOURCES PROCESSES</i> <i>Administer Training</i> <i>Introduction</i></p>
Expected Results:	The Administer Training Introduction section displays in the online Library.

Step 4	<p>Select the introduction section to view the list of topics available for maintaining tables in Administer Training.</p> <p style="text-align: center;"><i>Describe Concepts</i> <i>Maintain Tables</i> <i>Record Data</i> <i>View Information</i> <i>Generate Reports</i></p> <p>Note: Not all topics listed in the online Library are covered in class. Successfully completing this module of selected topics provides you the skills and knowledge necessary to perform procedures, view information, and generate reports relating to Administer Training.</p>
Expected Results:	An understanding of the information available in the online Library for Administer Training - Maintaining Tables

B. Business Process

Activity	Materials	
 LECTURE	 GUIDE	 HANDOUT

Step 1	Discuss the relevant business processes. TRN0851 - Add/Update Table Values – Course Table TRN0854 - Add/Update Table Values – Instructor Table TRN0870 - Add/Update a Non-Employee Student or Instructor TRN0855 - Add/Update Table Values – Training Facility Table
Expected Results:	The new business processes are identified and understood.

C. Concepts

<p>Activity</p>  <p>LECTURE</p>	<p>Materials</p>  <p>GUIDE</p>  <p>LIBRARY</p>
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<p>Step 1</p>	<p>The main underlying concepts for administering training are listed below:</p> <p>Training administration table set up Training courses and sessions</p>
<p>Expected Results:</p>	<p>An understanding of the main concepts involved in maintaining Administer Training tables</p>

<p>Step 2</p>	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>PHOENIX PROGRAM HUMAN RESOURCES PROCESSES</i> <i>Administer Training</i> <i>Concepts</i> <i>Training Administration Table Setup (c)</i> <i>Training Courses and Sessions (c)</i></p>
<p>Expected Results:</p>	<p>The Concepts section displays in the online Library.</p>

Concepts (continued)

Step 3	<p>Select and read the following concepts in the online Library:</p> <p style="text-align: center;"><i>PHOENIX PROGRAM HUMAN RESOURCES PROCESSES</i> <i>Administer Training</i> <i>Concepts</i> <i>Training Administration Table Setup (c)</i> <i>Training Courses and Sessions (c)</i></p>
Expected Results:	<p>An overall understanding of table maintenance and courses and sessions within Administer Training</p>

D. Exercises

<p>Activity</p> 	<p>Materials</p>   
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	<p>To prepare you to use Phoenix on the job effectively, there are three levels of complexity in the exercises:</p> <p>Level 1 - Involves one specific procedure explained in the online Library.</p> <p>Level 2 - Involves more complexity and may be a combination of procedures found in the online Library. Directions in the exercise combine steps listed in the online Library and may also combine procedures.</p> <p>Level 3 - Outlines a scenario and does not list the steps. Leaves it up to you to determine how to perform the activity, using the online Library as a reference tool.</p> <p>Maintaining Tables</p> <p>Exercise 1 - Add a new course (Level 1) Exercise 2 - Update Instructor Table values (Level 2) Exercise 3 - Add a non-employee instructor to a training course(Level 2) Exercise 4 - Add a new training facility (Level 2)</p>
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Exercise 1 - Add a new course (Level 1)

Scenario: The Training Director in your company wishes to add a course to the Course Table. This course, which is titled *The Georgia Merit System*, has one prerequisite. Your goal is to correctly enter the new course information into Phoenix.

online Library: *Course Table (tbl)*

Business Process: **TRN0851**

Step 1	<p>From the Table of Contents window in online Library, expand down the following path:</p> <p style="text-align: center;"><i>PHOENIX PROGRAM HUMAN RESOURCES PROCESSES</i> <i>Administer Training</i> <i>Table Maintenance Procedures</i> <i>Course Table (tbl)</i></p>
Expected Results:	The Course Table (tbl) section displays in the online Library.

Step 2	Read <i>Course Table (tbl)</i> in the online Library.
Expected Results:	An understanding of how to add or update courses to the Course Table in Phoenix

Step 3	<p>Toggle to PeopleSoft.</p> <p>Logon to PeopleSoft, if necessary.</p>
Expected Results:	The PeopleSoft window displays.

Exercise 1 (continued)

Step 4	Select: Go → Develop Workforce → Administer Training
Expected Results:	The Administer Training window displays.

Step 5	Select: Setup → Course Table → Course Table 1 (Add)
Expected Results:	A dialog box displays.

Step 6	Enter the following: Course Code: 4400XX Click: OK
Expected Results:	The Course Table panel for 4400XX displays.

Exercise 1 (continued)

Step 7	<p>Enter or select the following:</p> <p>Title: The Georgia Merit System</p> <p>Short Title: GA Merit</p> <p>Description: This course discusses the changing role of the Georgia Merit System.</p> <p>Course Status: Active</p> <p>Internal/External: Internal</p> <p>Session Administration: (Checkbox On)</p> <p>Creation Date: (Today's Date)</p> <p>Min/Max Students: 10/20</p> <p>Course Type: Functional</p> <p>Primary Deliv Method: Instructor</p> <p>Course Duration: 3 days</p> <p>Cost Per Student: 240</p>
Expected Results:	Correct data entry

Step 8	<p>Click: Course Table 2-Prereqs,Goals to proceed to the Course Table Prerequisites,Goals 2 panel</p>
Expected Results:	The Course Table Prereqs,Goals 2 panel displays.

Step 9	<p>Enter or select the following:</p> <p>Prerequisite Course: S27008</p>
Expected Results:	Correct data entry

Exercise 1 (continued)

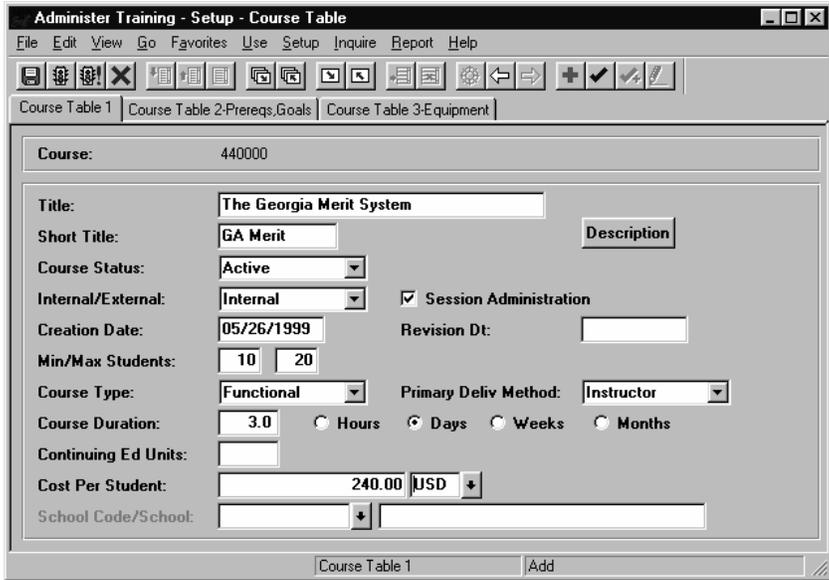
Step 10	Click: Course Table 3-Equipment to proceed to the Course Table Equipment 3 panel
Expected Results:	The Course Table Equipment 3 panel displays.

Step 11	Enter or select the following: Equipment/Materials Code: OH1
Expected Results:	Correct data entry

Step 12	Review data entry for accuracy. Click:  to save
Expected Results:	The new information is saved.

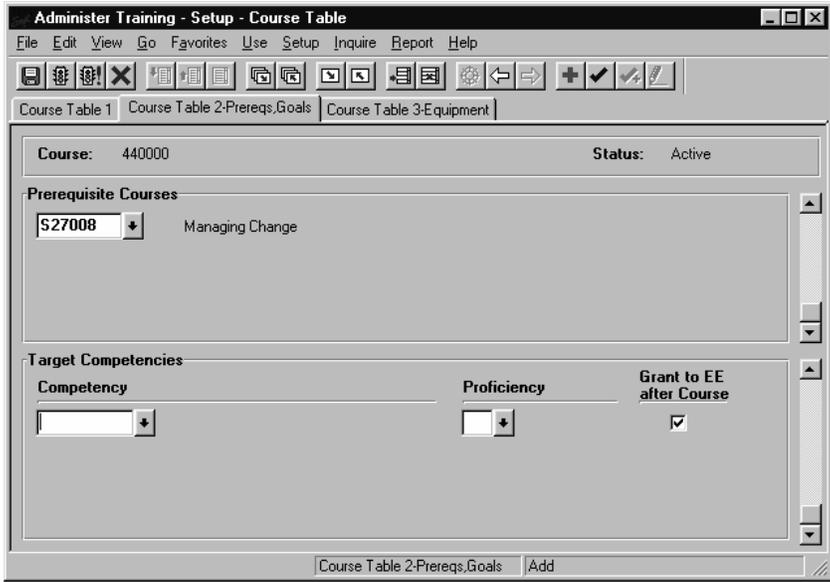
Check your results on the following pages.

Exercise 1 (continued)

<p>Check Results</p>	
<p>Step 13</p>	<p>Compare your Course Table 1 panel to the panel shown below:</p> 
<p>Expected Results:</p>	<p>The panel matches. Continue to next panel. If these elements do not match, review the steps and consult your Instructor.</p>

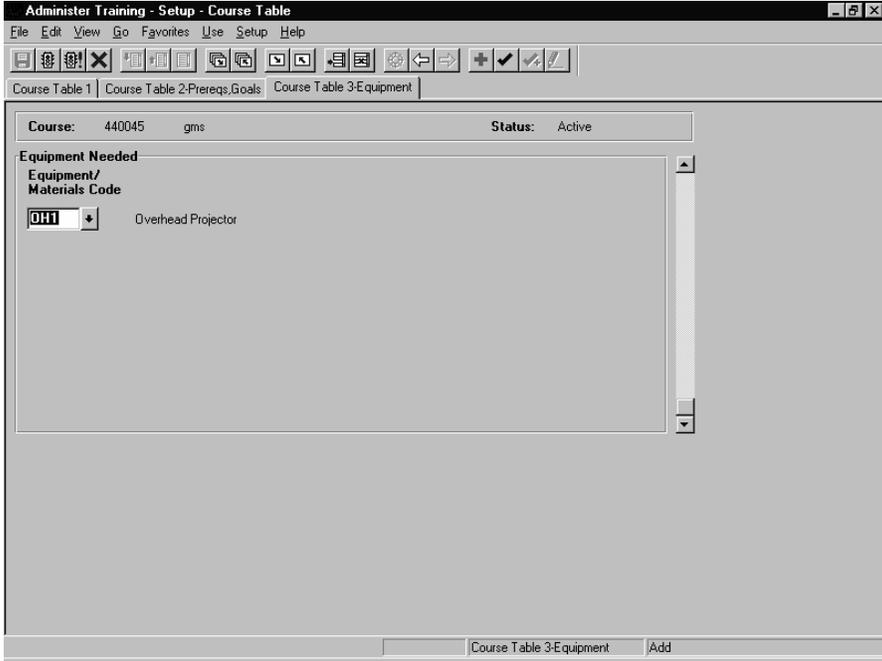
Exercise 1 (continued)

Check Results	
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Step 14	<p>Compare your Course Table 2 Prereqs, Goals panel to the panel shown below:</p> 
Expected Results:	<p>The panel matches. Continue to next panel. If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 1 (continued)

Check Results	
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Step 15	Compare your Course Table 3 - Equipment panel to the panel shown below: 
Expected Results:	The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.

Exercise completed.

Exercise 2 - Update Instructor Table values (Level 2)

Scenario: Bruce Underwood, an employee, is now qualified to teach Clinical Records Training and Customer Relations. Your goal is to correctly enter the new Courses Qualified to Teach information into Phoenix.

online Library *Instructor Table (tbl)*

Business Process: **TRN0854**

Step 1	Read <i>Instructor Table (tbl)</i> in the online Library.
Expected Results:	An understanding of how to add to or update the Instructor Table in Phoenix

Step 2	Access the Instructor Table for Bruce Underwood Empl ID: 422000XX
Expected Results:	The Instructor Table 1 panel displays.

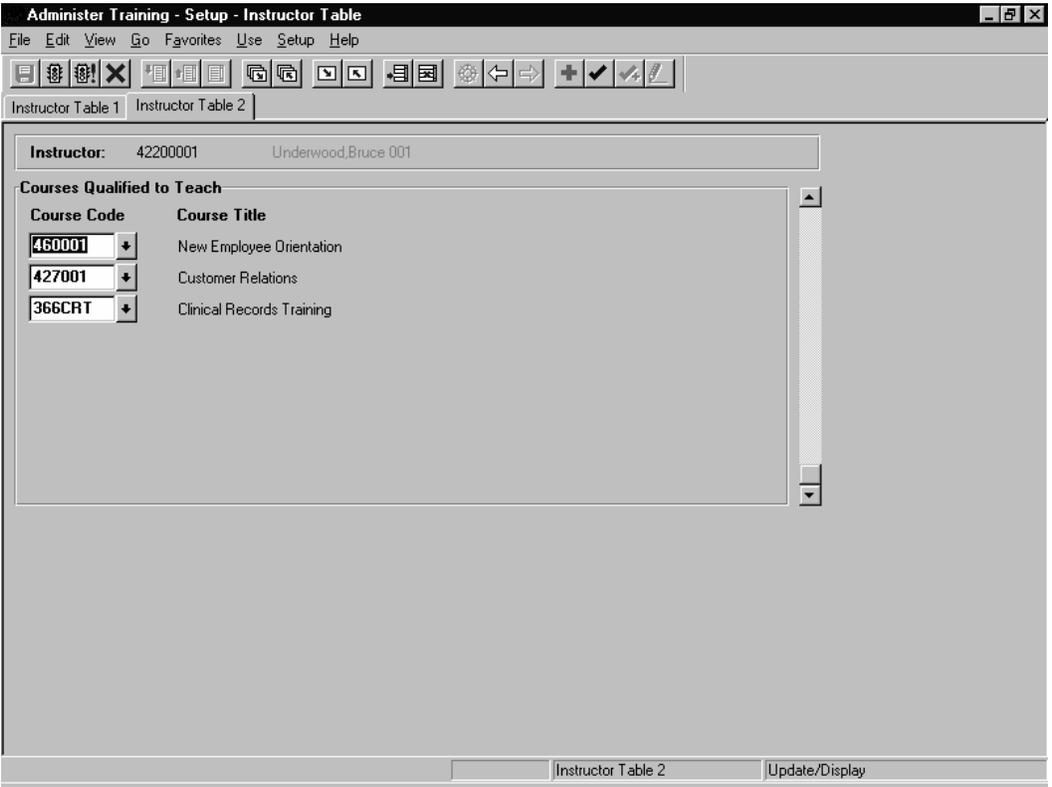
Step 3	Access the Instructor Table 2 panel.
Expected Results:	The Instructor Table 2 panel displays.

Step 4	Enter or select the following: Course Code: 366CRT Course Code: 427001
Expected Results:	Correct data entry

Exercise 2 (continued)

Step 5	Review data entry for accuracy. Click:  to save
Expected Results:	The new information is saved.

Check Results	
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Step 6	<p>Compare your Instructor Table 2 panel to the panel shown below:</p> 
Expected Results:	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 3 - Add a non-employee instructor to a training course (Level 2)

Scenario: The Training Director in your company wishes to add James Byrd, a non-employee, to the Instructor Table. Your goal is to correctly enter the new instructor information into Phoenix.

online Library *Instructor Table (tbl)*

Business Process: **TRN0854**
TRN0870

Step 1	Read <i>Non Employee Data (de)</i> in the online Library.
Expected Results:	An understanding of how to add to or update the Instructor Table in Phoenix.

Step 2	Access the Non-Employee Data panel and let the system to assign the next sequential non-employee ID number.
Expected Results:	The Non-Employee Data 1 panel displays.

Step 3	Enter or select the following: Name: Byrd,James Prefix: Mr Address: 742 Cross Street City: Norcross County: Gwinnett State: GA Zip: 30093 Phone Type: Business Phone Number: 404-555-4321
Expected Results:	Correct data entry

Exercise 3 (continued)

Step 4	Access the Non-Employee Data 2 panel.
Expected Results:	The Non-Employee Data 2 panel displays.

Step 5	Enter the following: Business Title: Consultant Employer: Byrd Consulting
Expected Results:	Correct data entry

Step 6	Review data entry for accuracy. Click:  to save (Record the Non-Employee # assigned by the system. You will use it in step 8 below.)
Expected Results:	The new information is saved.

Step 7	Access the Instructor Table 1 panel.
Expected Results:	A dialog box displays.

Step 8	Enter the Non-Employee ID that the system assigned in Step 6. Click: OK
Expected Results:	The Instructor Table 1 panel displays.

Exercise 3 (continued)

Step 9	Enter or select the following: Instructor Name: Byrd,James Hourly Rate: 100 Area of Expertise: Customer Relations
Expected Results:	Correct data entry

Step 10	Access the Instructor Table 2 panel.
Expected Results:	The Instructor Table 2 panel displays.

Step 11	Enter or select the following: Course Code: 427001
Expected Results:	Correct data entry

Step 12	Review data entry for accuracy. Click:  to save
Expected Results:	The new information is saved.

Check your results on the following pages.

Exercise 3 (continued)

Check Results

Step 13

Compare your Non-Employee Data 1 panel to the panel shown below:

The screenshot shows a software window titled "Administer Training - Use - Non-Employee Data". The window has a menu bar with "File", "Edit", "View", "Go", "Favorites", "Use", "Setup", "Inquire", "Report", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into two tabs: "Non-Employee Data 1" (selected) and "Non-Employee Data 2". The "Non-Employee Data 1" tab contains the following form fields:

- Non-EmpID:** 0000000000
- Name:** Byrd, James
- Prefix:** Mr
- Mailing Address:**
 - Address 1:** 742 Cross Street
 - Address 2:** (empty)
 - Address 3:** (empty)
 - City:** Norcross
 - County:** Gwinnett
 - State:** GA
 - Zip:** 30093
 - Country:** USA
- Phone Numbers:**
 - Type:** Business
 - Number:** 404/555-4321

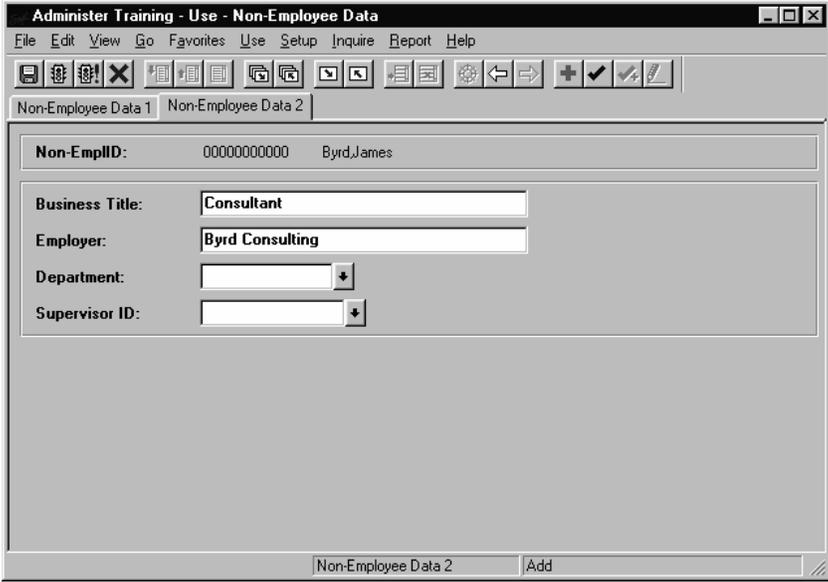
At the bottom of the window, there is a status bar with "Non-Employee Data 1" and an "Add" button.

Expected Results:

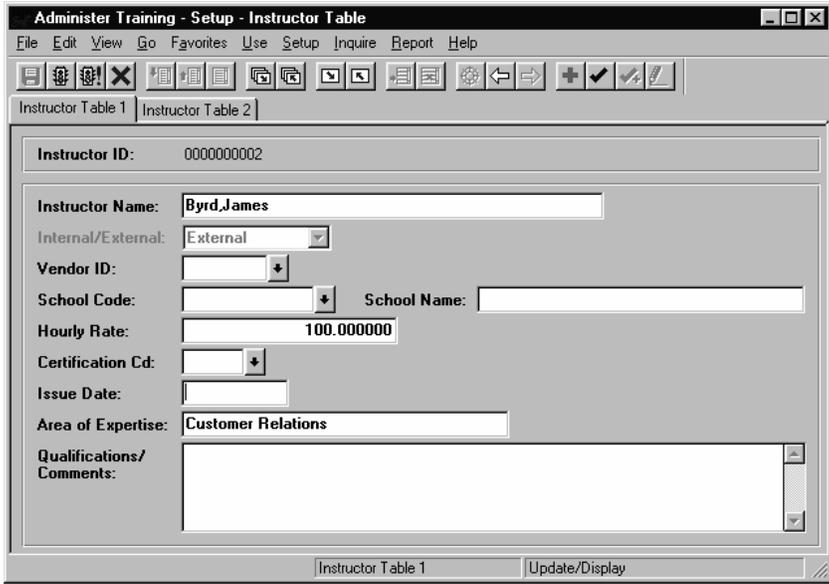
The panel matches. Continue to the next panel.
If these elements do not match, review the steps and consult your Instructor.

Exercise 3 (continued)

Check Results	
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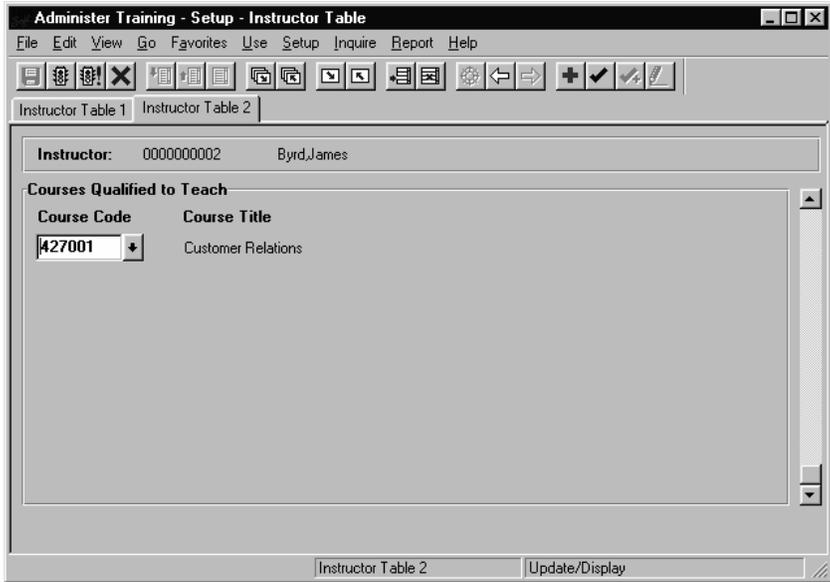
Step 14	<p>Compare your Non-Employee Data 2 panel to the panel shown below:</p> 
Expected Results:	<p>The panel matches. Continue to the next panel. If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 3 (continued)

<p>Check Results</p>	
<p>Step 15</p>	<p>Compare your Instructor Table 1 panel to the panel shown below:</p> 
<p>Expected Results:</p>	<p>The panel matches. Continue to the next panel. If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 3 (continued)

Check Results	
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Step 16	<p>Compare your Instructor Table 2 panel to the panel shown below:</p> 
Expected Results:	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 4 - Add a new training facility (Level 2)

Scenario: The Training Director in your company wishes to add a facility that you manage to the Training Facility Table. Your goal is to correctly enter the new training facility information into Phoenix.

online Library *Training Facility Table (tbl)*

Business Process: **TRN0855**

Step 1	Read <i>Training Facility Table (tbl)</i> in the online Library.
Expected Results:	An understanding of how to add to or update the Training Facility Table in Phoenix

Step 2	Enter 4409XX to assign a new facility. (Replace XX with the number assigned to you by your Instructor.)
Expected Results:	The Training Facility Table 1 panel displays.

Step 3	Enter or select the following: Facility Name: 301 Church Street Short Desc: 301Church Room: 200 Max Students/Room: 24 Floor #: 2 Building: 301 Church Address: 301 Church Street City: Decatur County: DeKalb State: GA Zip: 30022
Expected Results:	Correct data entry

Exercise 4 (continued)

Step 4	Access the Training Facility Table 2 panel.
Expected Results:	The Training Facility Table 2 panel displays.

Step 5	Enter or select the following: Contact Name: John Smith Contact Phone Type: Business Contact Phone: 770-555-7777
Expected Results:	Correct data entry

Step 6	Access the Training Facility Table 3 panel.
Expected Results:	The Training Facility Table 3 panel displays.

Step 7	Enter the following: Directions: Corner of Ponce De Leon and Church Street
Expected Results:	Correct data entry

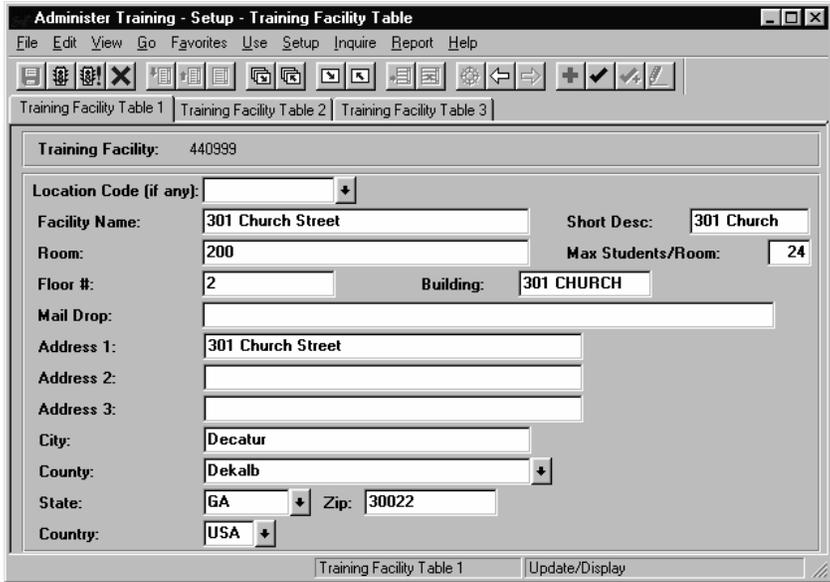
Exercise 4 (continued)

Step 8	Review data entry for accuracy. Click:  to save
Expected Results:	The new information is saved.

Check your results on the following pages.

Exercise 4 (continued)

Check Results	
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Step 9	<p>Compare your Training Facility Table 1 panel to the panel shown below:</p> 
Expected Results:	<p>The panel matches. Continue to next panel. If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 4 (continued)

Check Results

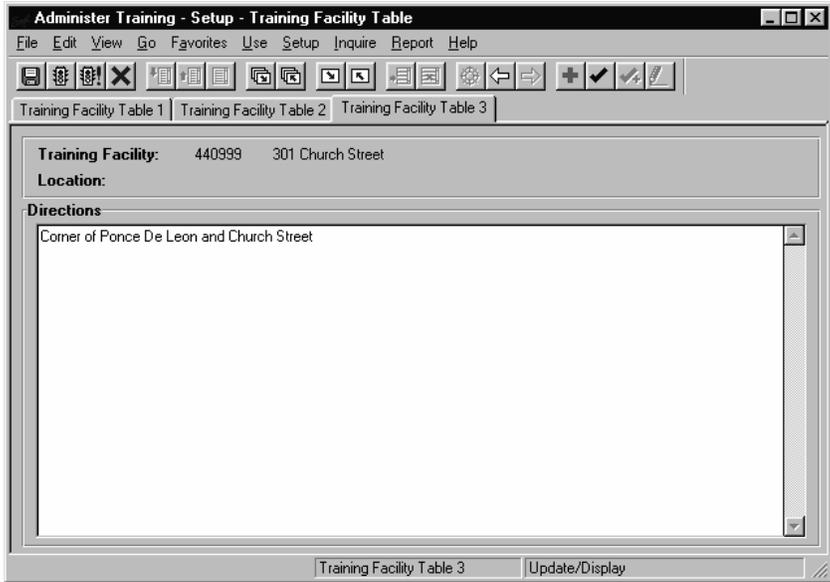
Step 10

Compare your Training Facility Table 2 panel to the panel shown below:

Expected Results:

The panel matches. Continue to next panel.
If these elements do not match, review the steps and consult your Instructor.

Exercise 4 (continued)

<p>Check Results</p>	
<p>Step 11</p>	<p>Compare your Training Facility 3 panel to the panel shown below:</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

E. Summary and Review

<p>Activity</p>  <p>LECTURE</p>	<p>Materials</p>  <p>GUIDE</p>  <p>REVIEW</p>
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<p>Step 1</p>	<p>Answer the following questions:</p> <ol style="list-style-type: none"> 1. What is the significance of “Company-managed” table values versus “statewide” values? 2. What do the first three numbers represent in Key Field Definitions? 3. Differentiate between course and session setup. 4. What is the role and importance of the Session Administration check box? 5. How does adding non-employee instructors differ from adding instructors who are employees? <p>Hint: Answers can be found in the online Library.</p>
<p>Expected Results:</p>	<p>An understanding of the key concepts for Training Administration table maintenance</p>

<p>Step 2 (optional)</p>	<p>Participate in a review activity by reviewing the objectives:</p> <p>Objectives:</p> <ol style="list-style-type: none"> 1. Add a new course 2. Update Instructor Table values 3. Add a non-employee instructor to a training course 4. Add a new training facility 5. Navigate through the online Library to locate all other Administer Training procedures
<p>Expected Results:</p>	<p>Successful completion of the review activity</p>

Administer Training



Congratulations! You have just completed the Administer Training module. This module contained the tools needed to learn all the concepts and procedures involved in Administer Training.

Goal To acquire the skills and knowledge necessary to perform all the procedures identified in the Administer Training section of the online Library.

Participant Objectives You should be able to:

1. Enroll students
2. Create waitlists
3. Reschedule students
4. Maintain student training records
5. View an employee's training record
6. Run reports
7. Perform table maintenance
8. Update courses and sessions
9. Navigate through the online Library to locate all other Administer Training procedures