Training Coordinator Learning and Development Business Process Guide

Overview

This user guide describes the process and functions that the Training Coordinator role has with setting up and tracking courses and sessions in the system.

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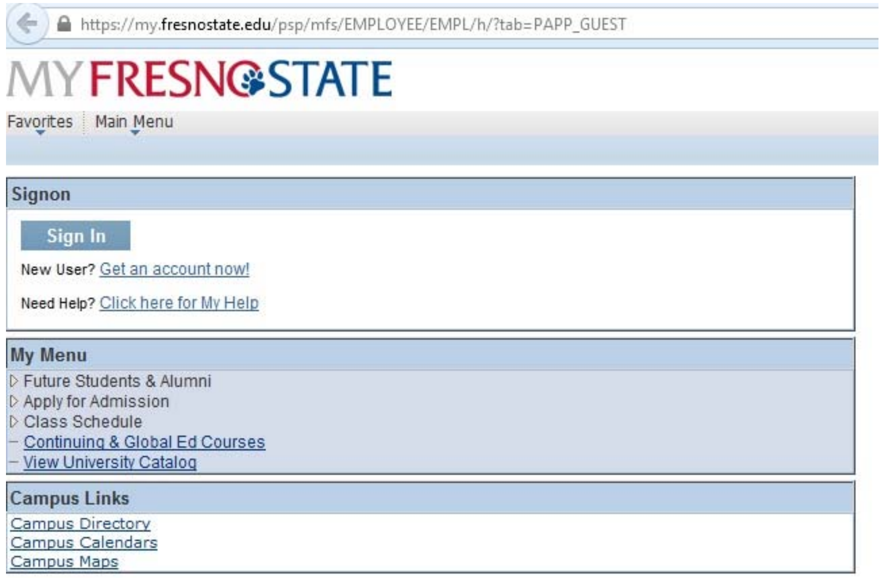
LOGGING IN

This section shows how to log into your MyFresnoState portal.

The myFRESNOSTATE homepage displays.

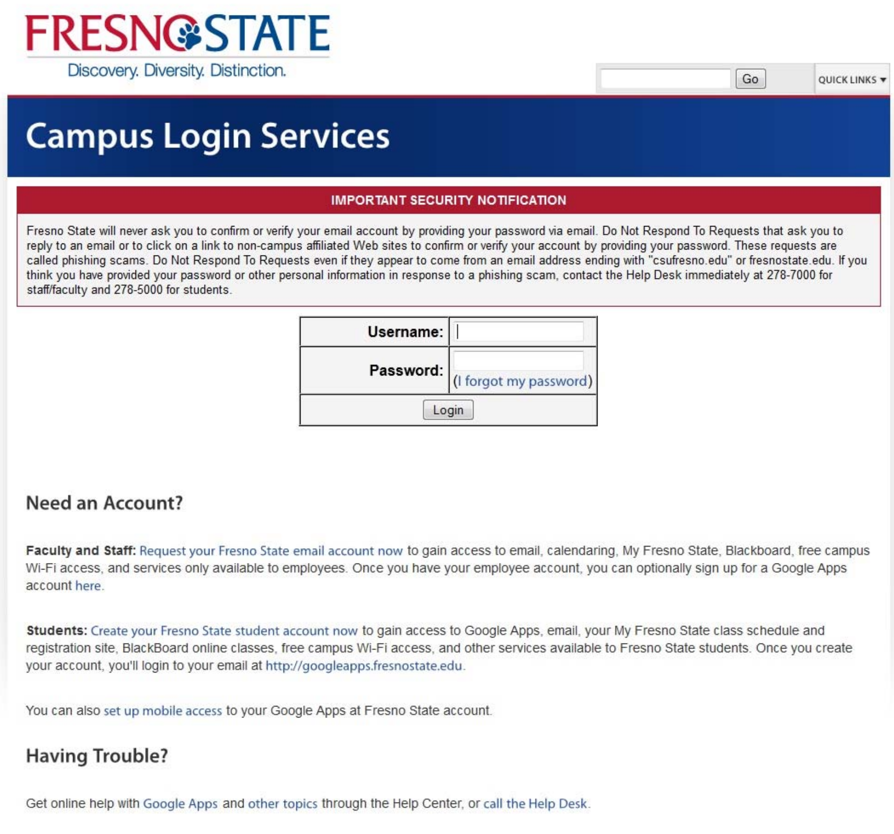
1. Go to MyFRESNOSTATE ([http://my.fresnostate.edu/).](http://my.fresnostate.edu/)
2. Click the MyFRESNO STATE SIGN IN button.



The Oracle PeopleSoft Enterprise Sign In page displays.

3. Enter your Fresno State ID and Password.
4. Click the “Sign In” button.

Note: If you have difficulty logging in, contact the Help Desk at 278-5000



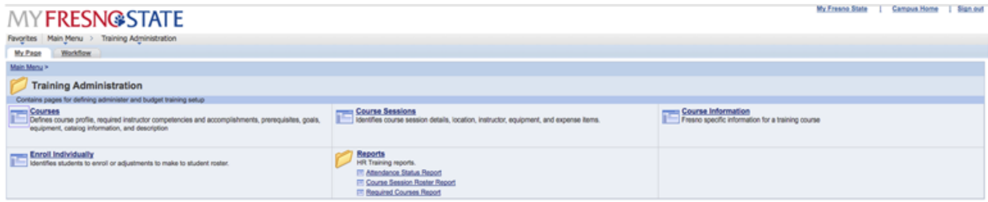
Request New Course in PeopleSoft

Training Courses can only be setup centrally by Human Resources. The form "Request New Course" must be completed if a new instructor led course or a new Blackboard course will be offered at Fresno State. HR will assign the course number and the department ID of the "coordinator" of the course. If your PeopleSoft security profile has departmental security (row level security), the course will be available for tracking and reporting.

Note: Skillport courses will be automatically added using the Skillport to PeopleSoft interface.

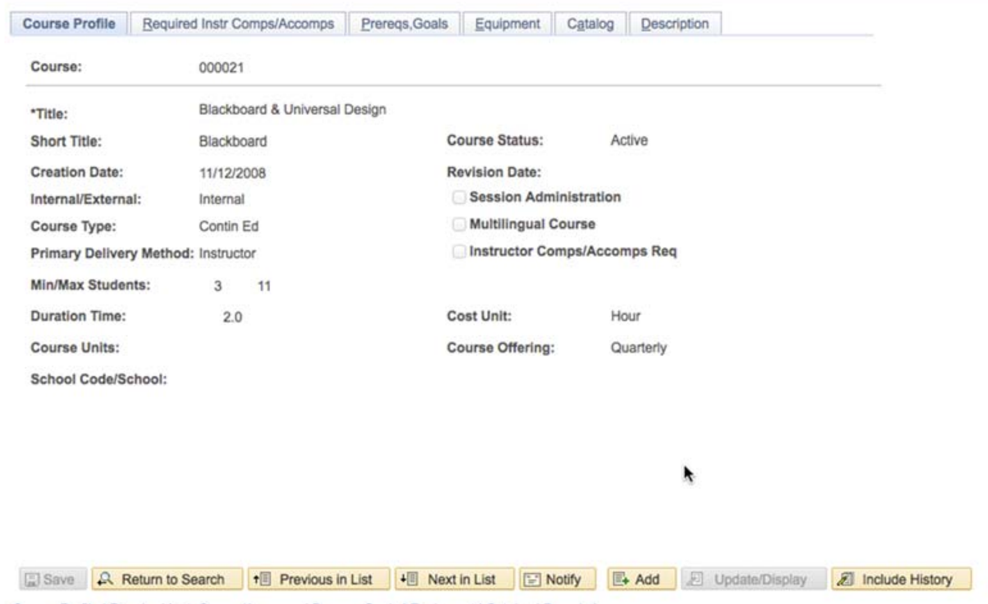
New Training Course

The training courses/sessions that you can access as a Training Coordinator can be found in the MyFresnoState portal under Main Menu > Training Administration.



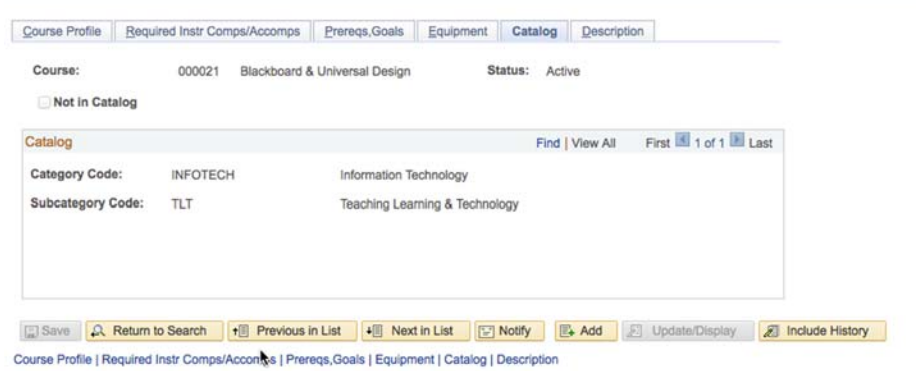
Navigate to the Courses page to review the course setup completed centrally by Human Resources. These pages are “display” only. If you find any errors with the page, please contact Human Resources with any corrections.

Course Profile: Review the min/max students and duration of course.



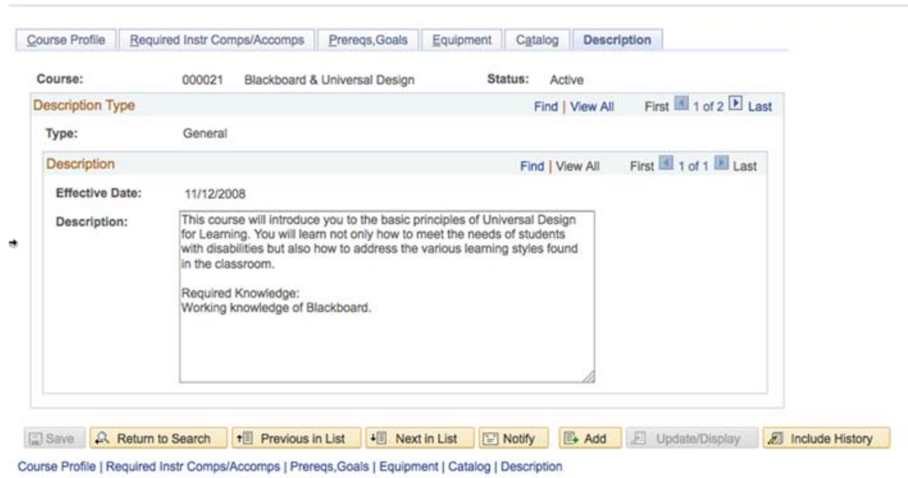
Required Instr Comps/Accompls, Prereqs Goals and Equipment pages are typically not used.

The Category and Sub-Category fields are used in employee self service to search for a particular course.



Courses (continues)

The Course description will be displayed in self service for the trainees to review.



Course Information – The training course information is what drives which courses are required (visible by the employee and Manager), who is required to take the course and note any exceptions.

This information is optional by course.

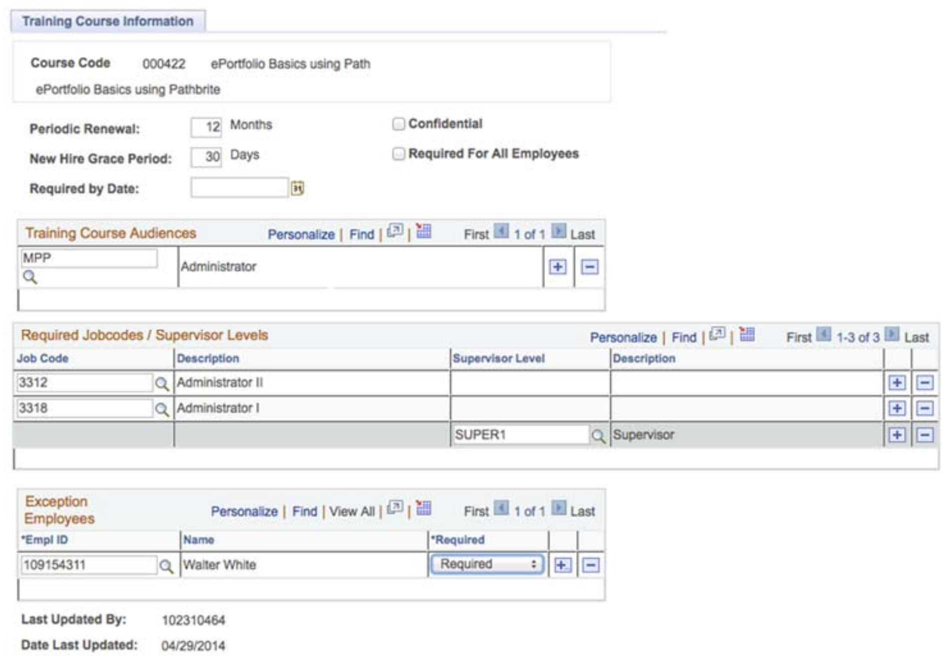
Periodic Renewal – If the course is required, how often must the trainee take the course.

New Hire Grace Period – How many days after the new hire effective date does the employee have to complete the course.

Required by Date – What date must the required employees take the course by (this is typically used for a new course that must be taken by a certain date)

Required job codes/supervisor – List the job codes that are required to take the course. Supervisor are designated at the Position level and defined by the CO requirements.

Exception Employees – Add any employee that don't meet the job code/supervisor criteria that are either required (or not required) to take the course.



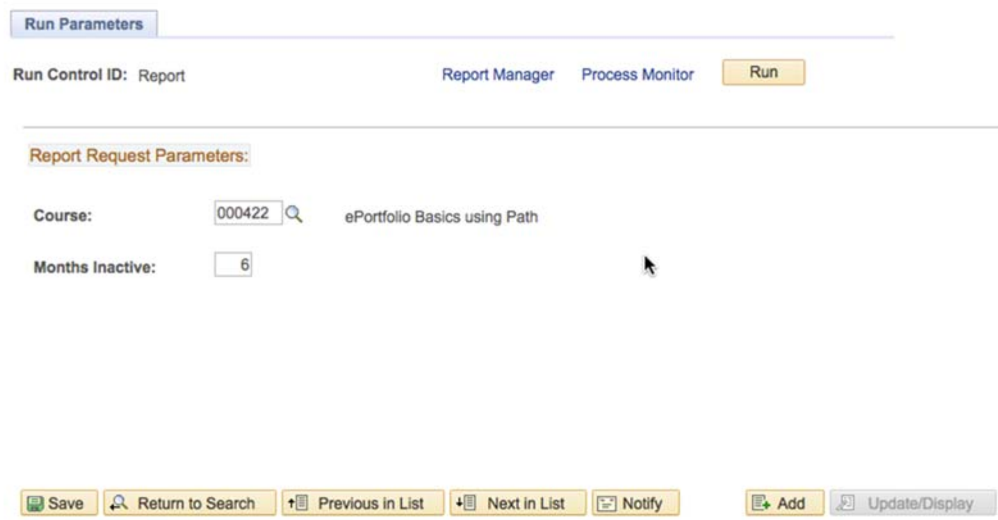
Managing Course Information/Purge Terminated Employees – If the training course that you administer has required attendees under the Exception employees section of the page, you must periodically run the Inactive Required Trainee process to identify any employees that have terminated all jobs at Fresno State.

Navigate to Main Menu > Training Administration > Reports > Inactive Required Trainees

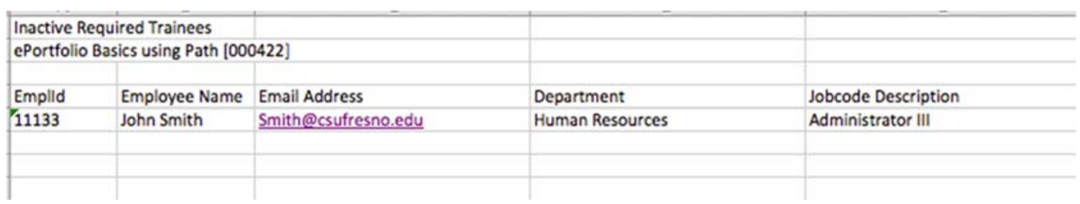
Enter the Course Number

Enter the number of months the person has been inactive. In this example, anyone that has had all of their jobs terminated for 6 months or more will be listed on the report.

Click run, ok and Report Manager.



Select the Inactive Required Trainee link from Reports Manager. An Excel spreadsheet will list any individuals that are marked as required that have had their jobs terminated within x months (as entered on run control).

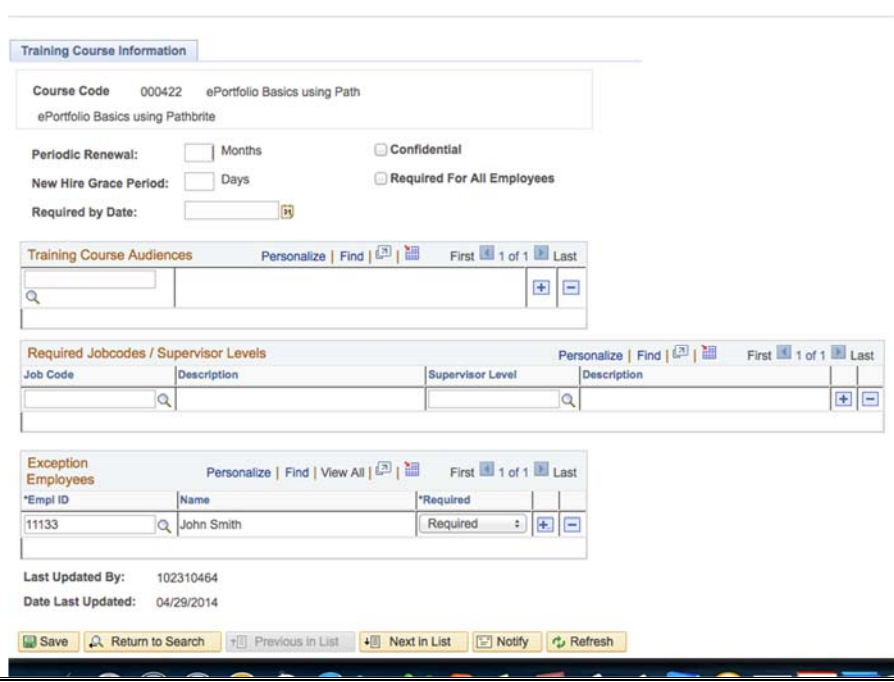


Inactive Required Trainees
ePortfolio Basics using Path [000422]

EmplId	Employee Name	Email Address	Department	Jobcode Description
11133	John Smith	Smith@csufresno.edu	Human Resources	Administrator III

Navigate to the Course Information page.

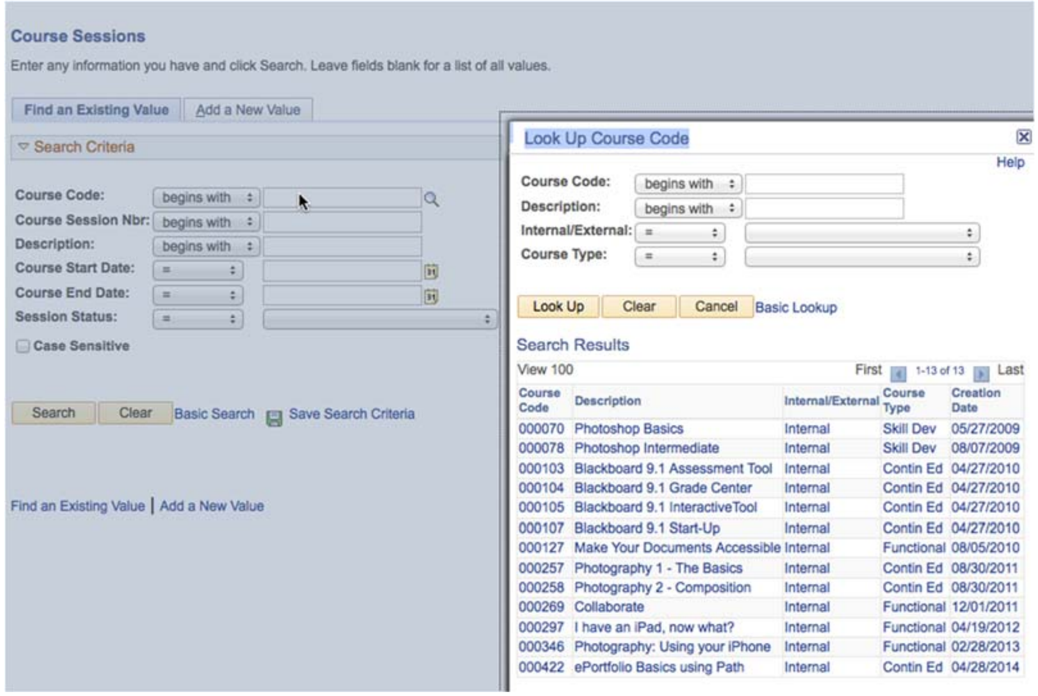
Under the Exception Employees, locate the individual to delete. Select the – sign and click save.



Add New Sessions – Once the training course has been established, the Training Coordinator can add sessions as needed (Note: Skillport sessions are created automatically)

Courses that are activated by Human Resources will be shown on the Course Code prompt. If the course it not displayed, please contact Human Resources.

To add sessions to the course, click on the “Add a New Value” link at the bottom of the page.



Enter the next sequential value for the session number.

Add New Sessions (continued)

Enter the information to activate the session for student enrollment via self-service.

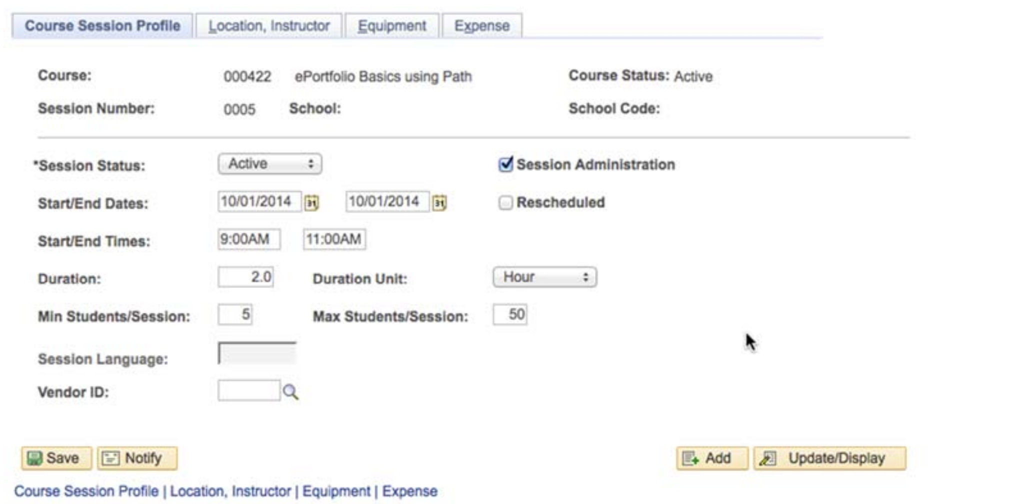
Session Status – Active

Session Administration - check on

Start/End times of sessions

Min/Max number of students for this sessions

Session Language and Vendor ID not used



Complete the Location/Instructor tab

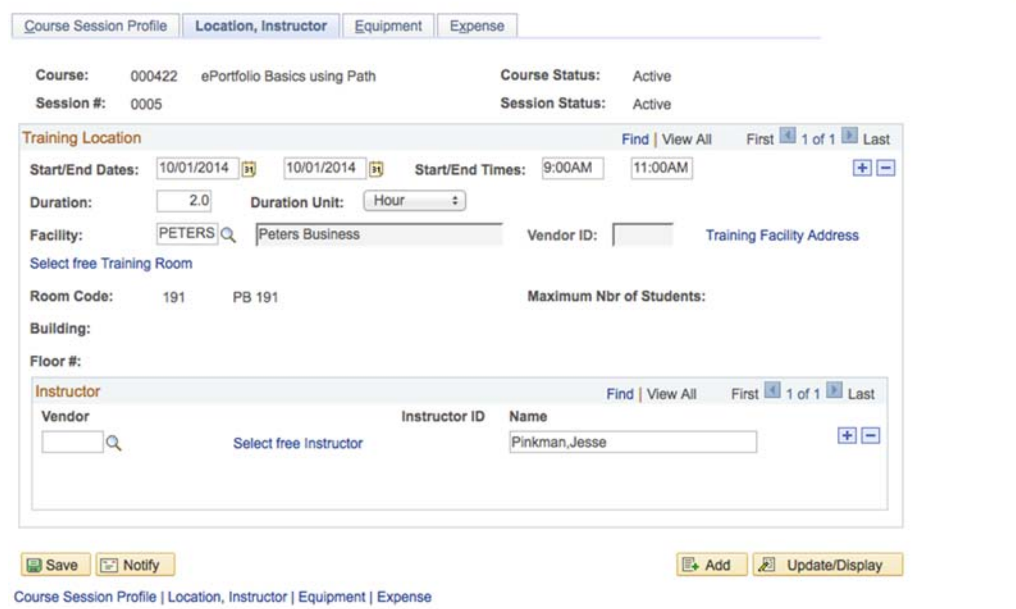
Start/end dates default from prior entry. Update as needed.

Choose the Facility. Click on the Training Room to select the room for the facility.

Instructor Name – Enter the instructor name (Last Name, First Name format)

Equipment and Expense tabs not used.

Click Save to activate the sessions for student enrollment.



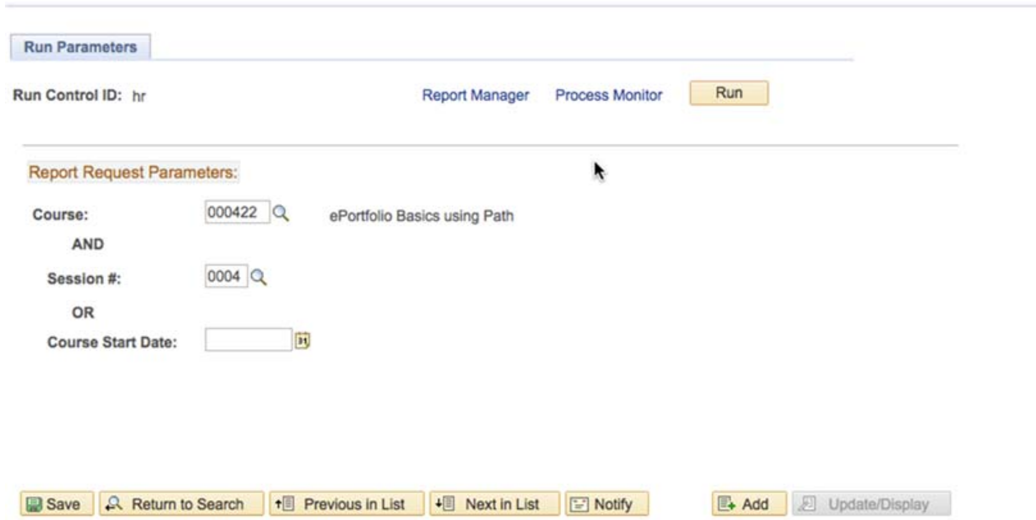
Run Course Session Roster Report – For in-person training, run a student roster to create a sign-in sheet. This will be used to mark attendance online in PeopleSoft.

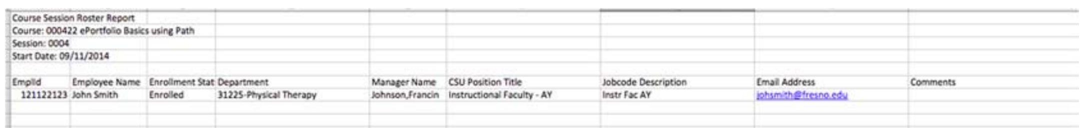
Navigate to Main Menu > Training Administration > Course Session Roster Report

Enter the Course Number and Session Number or the Course Number and Course Start date.

Click Run. Click OK.

Select the Report Manager link at the top of page. Select the report name and the report will open in Excel.





Course Session Roster Report
Course: 000422 ePortfolio Basics using Path
Session: 0004
Start Date: 09/11/2014

Emplid	Employee Name	Enrollment Stat	Department	Manager Name	CSU Position Title	Jobcode Description	Email Address	Comments
121122123	John Smith	Enrolled	31225-Physical Therapy	Johnson,Francin	Instructional Faculty - AY	Instr Fac AY	johsmith@fresno.edu	

The Course Session Roster report will display all individuals that have enrolled in the course. It is recommended that this report be used as a sign-in sheet to record attendance for your course session.

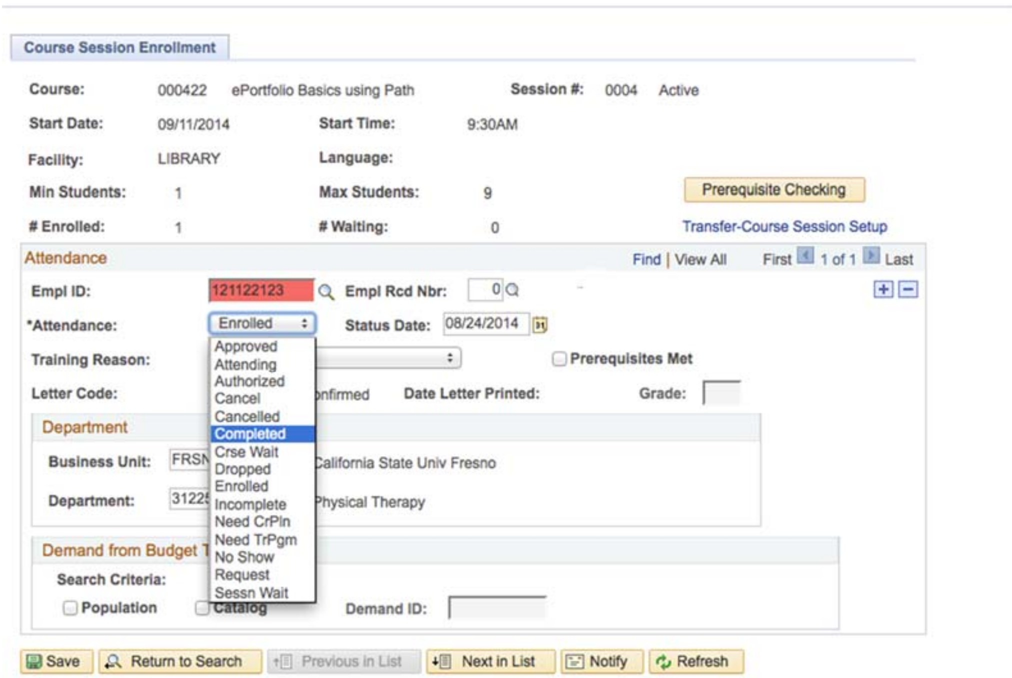
Session Enrollment – After the course session has completed, use your roster to mark individuals as either

Completed or No Show.

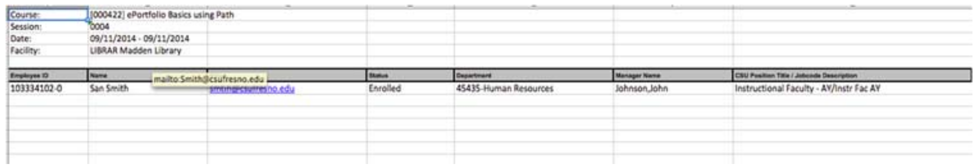
<table>
<tr>
<td>Navigate to Main Menu > Training Administration > Enroll Individually

Each trainee will be listed under the Attendance section of the page. To view all individuals on one page, click on the View All link.

Mark each individual as either Completed, No Show or other applicable status.

Click Save.</td>
<td>
</td>
</tr>
</table>

Attendance Status Report – A status report can be run at anytime listing the individuals that have enrolled in the course and session.

Navigate to Main Menu > Training Administration > Attendance Status Report Enter the Course Number and Session Number. Click Run, OK and Report Manager. When the report has completed, click on the title. An Excel spreadsheet will list all trainees and their applicable status.	

Course:	[000422] ePortfolio Basics using Path					
Session:	0004					
Date:	09/11/2014 - 09/11/2014					
Facility:	LIBRAR Madden Library					
Employee ID	Name		Status	Department	Manager Name	CSU Position Title / Jobcode Description
103334102-0	San Smith	[illegible]no.edu	Enrolled	45435-Human Resources	Johnson,John	Instructional Faculty - AY/Instr Fac AY

Managing Required Courses – To manage courses that are required you, the required course report will reflect all those individuals that are current and display tabs listing individuals that are past due. This list will provide you with the tool to contact that employee and their Manager if needed.

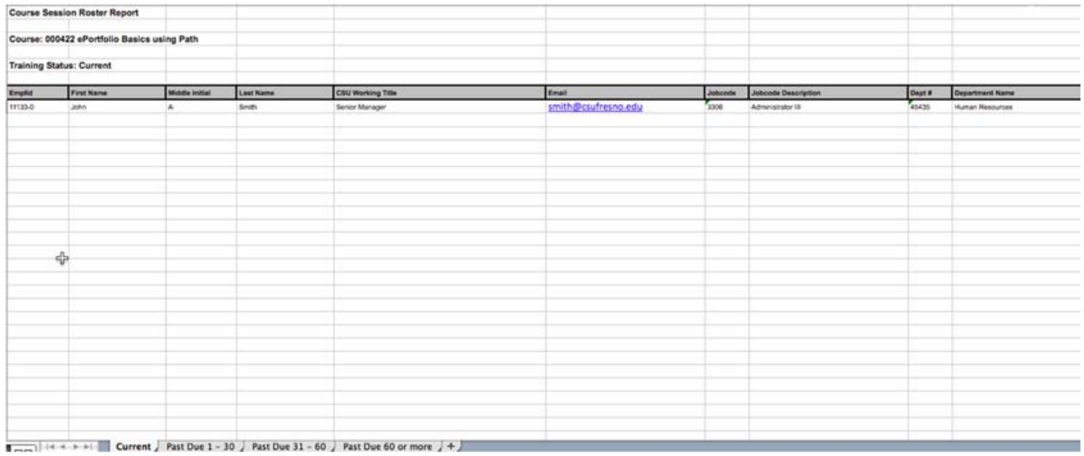
Navigate to Main Menu, Training Administration, Required Course Report.

Enter the Course number.

Click Run, Ok and Report Manager.

Once completed, click on the report name and open in Excel.

The report will have 4 tabs. Based on the Course Information criteria that has been entered, The first tab displays those individuals that are current, the second tab list past due of 1-30 days, the third tab lists past due 31-60 days and the 4th tab displays past due trainees of 60+ days

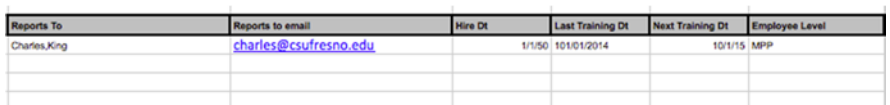


Course Session Roster Report

Course: 000422 ePortfolio Basics using Path

Training Status: Current

Emplid	First Name	Middle Initial	Last Name	CSU Working Title	Email	Jobcode	Jobcode Description	Dept #	Department Name
11133-0	John	A	Smith	Senior Manager	smith@csufresno.edu	3306	Administrator III	45435	Human Resources



Reports To	Reports to email	Hire Dt	Last Training Dt	Next Training Dt	Employee Level
Charles,King	charles@csufresno.edu	1/1/50	101/01/2014	10/1/15	MPP

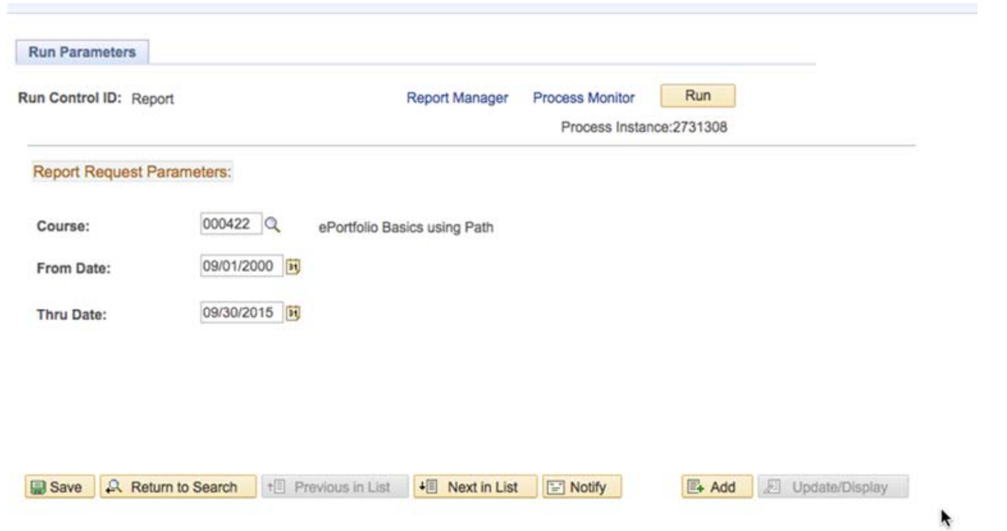
Completed Training report

Navigate to Main Menu, Training Administration, Completed Training Report Report.

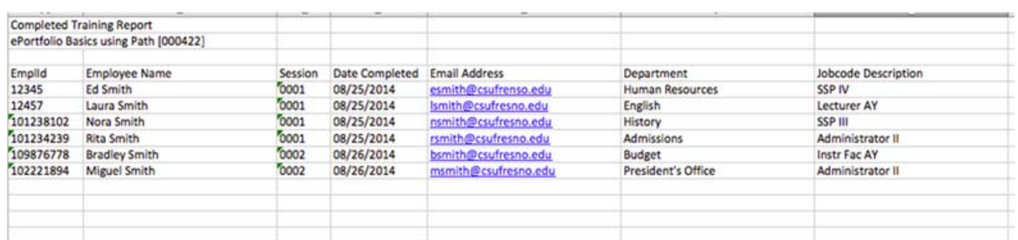
Enter the Course number.

Enter the from and through date

Click Run, Ok and Report Manager.



The report will show all individuals who have taken the course for a period of time. This will include multiple session numbers over multiple dates.



Completed Training Report
ePortfolio Basics using Path [000422]

EmplId	Employee Name	Session	Date Completed	Email Address	Department	Jobcode Description
12345	Ed Smith	0001	08/25/2014	esmith@csufrenso.edu	Human Resources	SSP IV
12457	Laura Smith	0001	08/25/2014	lsmith@csufresno.edu	English	Lecturer AY
101238102	Nora Smith	0001	08/25/2014	nsmith@csufresno.edu	History	SSP III
101234239	Rita Smith	0001	08/25/2014	rsmith@csufresno.edu	Admissions	Administrator II
109876778	Bradley Smith	0002	08/26/2014	bsmith@csufresno.edu	Budget	Instr Fac AY
102221894	Miguel Smith	0002	08/26/2014	msmith@csufresno.edu	President's Office	Administrator II