



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.

Table of Contents

Logging In	1
Request New Course in PeopleSoft.....	3
Review Training Course Online	4
Setup Course Information	6
Manage Course Information/Purge Terminated Employees.....	7
Add New Sessions.....	8
Course Roster Report.....	10
Update Session Enrollment	11
Attendance Status Report.....	12
Managing Required Courses.....	13

LOGGING IN

This section shows how to log into your MyFresnoState portal.

The myFRESNOSTATE homepage displays.

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

https://my.fresnostate.edu/psp/mfs/EMPLOYEE/EMPL/h/?tab=PAPP_GUEST

MY FRESNO STATE

Favorites Main Menu

Signon

[Sign In](#)

New User? [Get an account now!](#)

Need Help? [Click here for My Help](#)

My Menu

- ▷ Future Students & Alumni
- ▷ Apply for Admission
- ▷ Class Schedule
- [Continuing & Global Ed Courses](#)
- [View University Catalog](#)

Campus Links

- [Campus Directory](#)
- [Campus Calendars](#)
- [Campus Maps](#)

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

FRESNO STATE

Discovery. Diversity. Distinction.

Go QUICK LINKS

Campus Login Services

IMPORTANT SECURITY NOTIFICATION

Fresno State will never ask you to confirm or verify your email account by providing your password via email. Do Not Respond To Requests that ask you to reply to an email or to click on a link to non-campus affiliated Web sites to confirm or verify your account by providing your password. These requests are called phishing scams. Do Not Respond To Requests even if they appear to come from an email address ending with "csufresno.edu" or fresnostate.edu. If you think you have provided your password or other personal information in response to a phishing scam, contact the Help Desk immediately at 278-7000 for staff/faculty and 278-5000 for students.

Username:	<input type="text"/>
Password:	<input type="password"/> (I forgot my password)
<input type="button" value="Login"/>	

Need an Account?

Faculty and Staff: Request your Fresno State email account now to gain access to email, calendaring, My Fresno State, Blackboard, free campus Wi-Fi access, and services only available to employees. Once you have your employee account, you can optionally sign up for a Google Apps account [here](#).

Students: Create your Fresno State student account now to gain access to Google Apps, email, your My Fresno State class schedule and registration site, BlackBoard online classes, free campus Wi-Fi access, and other services available to Fresno State students. Once you create your account, you'll login to your email at <http://googleapps.fresnostate.edu>.

You can also set up mobile access to your Google Apps at Fresno State account.

Having Trouble?

Get online help with Google Apps and other topics through the Help Center, or call the Help Desk.

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

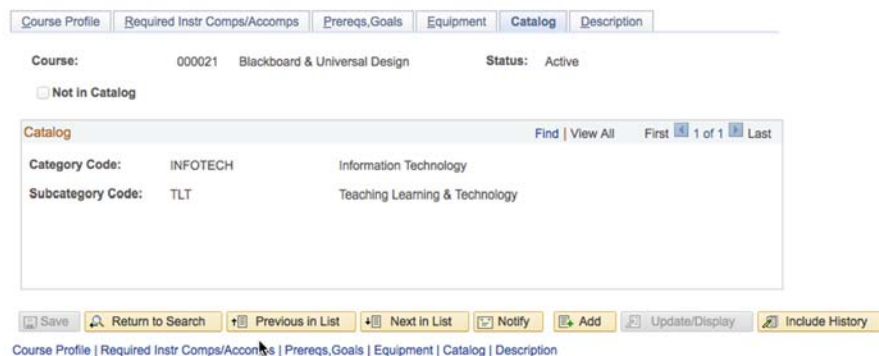
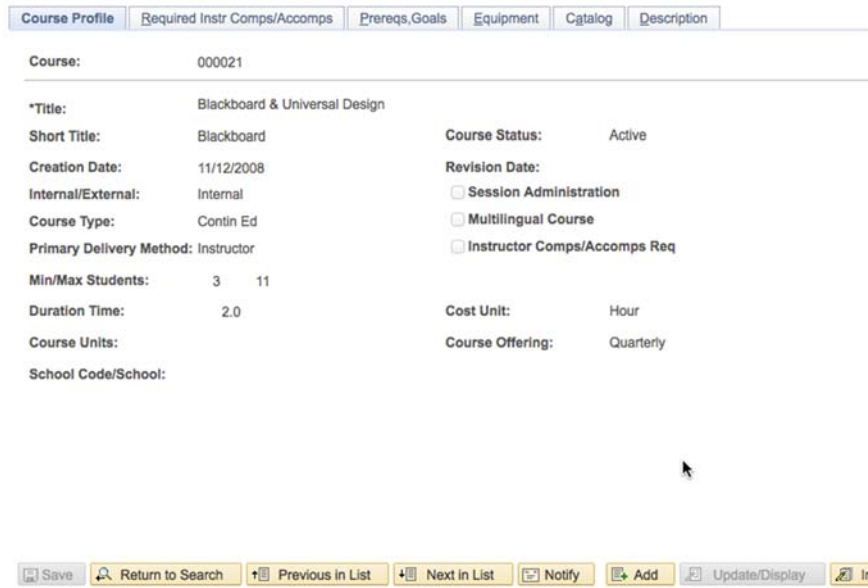
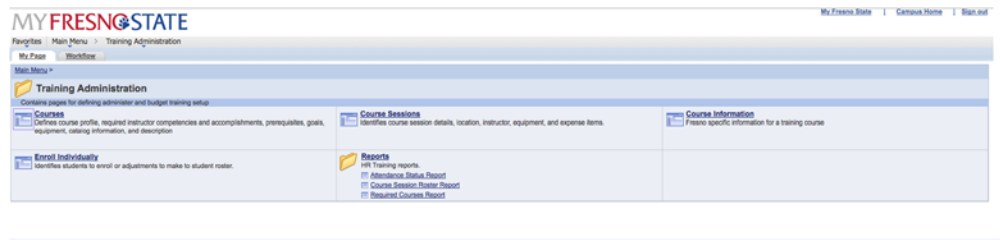
The training courses/sessions that you can access as a Training Coordinator can be found in the MyFresnoState portal under Main Menu > Training Administration.

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.

The screenshot shows a web interface for course management. At the top, there are tabs for 'Course Profile', 'Required Instr Comps/Accomps', 'Prereqs,Goals', 'Equipment', 'Catalog', and 'Description'. The 'Description' tab is active. Below the tabs, the course information is displayed: 'Course: 000021 Blackboard & Universal Design' and 'Status: Active'. There are two 'Description Type' sections. The first section shows 'Type: General' and 'Effective Date: 11/12/2008'. The second section shows the 'Description' text: 'This course will introduce you to the basic principles of Universal Design for Learning. You will learn not only how to meet the needs of students with disabilities but also how to address the various learning styles found in the classroom. Required Knowledge: Working knowledge of Blackboard.' At the bottom of the page, there are several buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', and 'Include History'. A breadcrumb trail at the very bottom reads: 'Course Profile | Required Instr Comps/Accomps | Prereqs,Goals | Equipment | Catalog | Description'.

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.

Training Course Information

Course Code: 000422 ePortfolio Basics using Path
ePortfolio Basics using Pathbrite

Periodic Renewal: 12 Months Confidential
New Hire Grace Period: 30 Days Required For All Employees
Required by Date:

Training Course Audiences Personalize | Find | | First 1 of 1 Last

MPP	Administrator		
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Required Jobcodes / Supervisor Levels Personalize | Find | | First 1-3 of 3 Last

Job Code	Description	Supervisor Level	Description		
3312	Administrator II				
3318	Administrator I				
		SUPER1	Supervisor		

Exception Employees Personalize | Find | View All | | First 1 of 1 Last

*Empl ID	Name	*Required		
109154311	Walter White	Required		

Last Updated By: 102310464
Date Last Updated: 04/29/2014

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).

Navigate to the Course
Information page.

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

Run Parameters

Run Control ID: Report Report Manager Process Monitor **Run**

Report Request Parameters:

Course: ePortfolio Basics using Path

Months Inactive:

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Add** **Update/Display**

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

Training Course Information

Course Code: 000422 ePortfolio Basics using Path
ePortfolio Basics using Pathbrite

Periodic Renewal: Months Confidential

New Hire Grace Period: Days Required For All Employees

Required by Date:

Training Course Audiences Personalize | Find | First 1 of 1 Last

Required Jobcodes / Supervisor Levels Personalize | Find | First 1 of 1 Last

Job Code	Description	Supervisor Level	Description
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Exception Employees Personalize | Find | View All | First 1 of 1 Last

*Empl ID	Name	*Required
11133	John Smith	Required

Last Updated By: 102310464
Date Last Updated: 04/29/2014

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh**

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

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.

The screenshot shows the 'Course Session Profile' form with the 'Location, Instructor' tab selected. The form contains the following fields and values:

- Course: 000422 ePortfolio Basics using Path
- Course Status: Active
- Session Number: 0005
- School: [blank]
- School Code: [blank]
- *Session Status: Active (dropdown)
- Session Administration: (checkbox)
- Rescheduled: (checkbox)
- Start/End Dates: 10/01/2014 (calendar icon) to 10/01/2014 (calendar icon)
- Start/End Times: 9:00AM to 11:00AM
- Duration: 2.0
- Duration Unit: Hour (dropdown)
- Min Students/Session: 5
- Max Students/Session: 50
- Session Language: [blank]
- Vendor ID: [blank]

Buttons: Save, Notify, Add, Update/Display. Breadcrumbs: Course Session Profile | Location, Instructor | Equipment | Expense.

The screenshot shows the 'Course Session Profile' form with the 'Location, Instructor' tab selected. The form contains the following fields and values:

- Course: 000422 ePortfolio Basics using Path
- Course Status: Active
- Session #: 0005
- Session Status: Active
- Training Location: Find | View All | First 1 of 1 | Last
- Start/End Dates: 10/01/2014 (calendar icon) to 10/01/2014 (calendar icon)
- Start/End Times: 9:00AM to 11:00AM
- Duration: 2.0
- Duration Unit: Hour (dropdown)
- Facility: PETERS (dropdown) | Peters Business (text)
- Vendor ID: [blank]
- Training Facility Address: [blank]
- Select free Training Room: [link]
- Room Code: 191 PB 191
- Maximum Nbr of Students: [blank]
- Building: [blank]
- Floor #: [blank]
- Instructor: Find | View All | First 1 of 1 | Last
- Vendor: [blank]
- Select free Instructor: [link]
- Instructor ID: [blank]
- Name: Pinkman, Jesse (text)

Buttons: Save, Notify, Add, Update/Display. Breadcrumbs: Course Session Profile | Location, Instructor | Equipment | Expense.

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.

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.

Run Parameters

Run Control ID: hr
Report Manager
Process Monitor
Run

Report Request Parameters:

Course: ePortfolio Basics using Path

AND

Session #:

OR

Course Start Date:

Course Session Roster Report								
Course: 000422 ePortfolio Basics using Path								
Session: 0004								
Start Date: 09/11/2014								
EmpId	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	jahsmith@fresno.edu	

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

Completed or No Show.

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.

Course Session Enrollment

Course: 000422 ePortfolio Basics using Path Session #: 0004 Active
Start Date: 09/11/2014 Start Time: 9:30AM
Facility: LIBRARY Language:
Min Students: 1 Max Students: 9 Prerequisite Checking
Enrolled: 1 # Waiting: 0 Transfer-Course Session Setup

Attendance Find | View All First 1 of 1 Last

Empl ID: 121122123 Empl Rcd Nbr: 0

*Attendance: Enrolled Status Date: 08/24/2014

Training Reason: Prerequisites Met

Letter Code: Date Letter Printed: Grade:

Department: Completed

Business Unit: FRSN Crse Wait California State Univ Fresno

Department: 31225 Dropped Physical Therapy

Demand from Budget Enrolled

Search Criteria: Incomplete Need CrPin

Population Catalog Demand ID:

Save Return to Search Previous in List Next in List Notify Refresh

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:	1000422) ePortfolio Basics using Path					
Session:	0004					
Date:	09/11/2014 - 09/11/2014					
Facility:	LIBRAR Madden Library					
Employee ID	Name	Email	Status	Department	Manager Name	CSIU Position Title / Jobcode Description
103334102-0	San Smith	mailto:Smith@csu.tresno.edu	Enrolled	45435-Human Resources	Johnson,John	Instructional Faculty - AN/Instr Fac AV

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: 00422 ePortfolio Basics using Path

Training Status: Current

Empid	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	4306	Administrator III	43435	Human Resources

Current | Past Due 1 - 30 | Past Due 31 - 60 | Past Due 60 or more

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

Run Parameters

Run Control ID: Report
Report Manager
Process Monitor
Run

Process Instance:2731308

Report Request Parameters:

Course: ePortfolio Basics using Path

From Date:

Thru Date:

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@csufresno.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