State of Oklahoma
COR103 Administer Training Manual

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Authorized by: [CORE]	Original Issue: [05/30/2008]
Maintained by: [HRMS Lead]	Current Version: [05/30/2008]
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ADMINISTER TRAINING OVERVIEW

The Administer Training Module allows each agency to enroll their own employees in all CORE offered courses. Beginning with the Fall 2008 schedule, all the Office of Personnel Management, (OPM) HRDS courses will be available for enrollment on the Administer Training module as well. Each agency designated Training Nominating Official(s) who will have access to the module to enroll employees. This manual provides the instruction needed to enroll, wait list and drop employees in CORE and OPM offered courses.

The CORE Course Calendar is offered on the CORE Website. Link provided below.
http://www.ok.gov/triton/modules/calendar/calendar.php?calendar_seq=6

When you enroll employees you will need to note both the Course Number as well as the Session Number.

ROLE DEFINITIONS

Training Nominating Official – Each agency has identified Training Nominating Official(s) within their agency to enroll employees in both CORE and OPM's HRDS courses. This person(s) will have access to the Administer Training module and be able to enroll employees in the various course offerings.

CORE Training Lead – CORE will provide an administrator to enroll the wait listed employees and send notification to the employees. The CORE Training Lead will also enroll ALL Higher Education institution employees in the CORE courses.

OPM Training Lead – OPM will provide an administrator to enroll wait listed employees and send notification to the employee. The OPM Training Lead will also send notification of attendance to the courses.

CORE COURSE OVERVIEW

Following is a listing of the currently offered CORE Courses, their Course Number and a Short Description. Please note the CORE courses all begin with 'COR'.

Course Number	Course Name
	Human Resource Management Systems
COR101	HRMS Refresher
COR103	Administer Training
COR104	Base Benefits
COR105	Maintain Employee Payroll
COR106	Time and Labor
COR107	HRMS View Only
COR205	Processing Payroll
COR301	Position Management/Hiring and Employee Position Management
	Procurement
COR108	Requisition Creation and Processing
COR109	Worklist Approval
COR110	Purchase Order Administration
COR130	Releases on Statewide Contracts
COR132	Purchase Order Match
COR151	Receiving
	Accounts Payable
COR112	Purchase Order Voucher
COR113	Regular Voucher
COR118	Accounts Payable Reports
COR214	Payroll to AP Withholding Claim Import
COR216	P-Card Voucher Build
	General Ledger
COR123	Journal, Ledger, and Budget Inquiry, Query and Reports
COR202	Month / Year End Reconciliation
	Budget
COR124	Budget
COR224	EPM Agency Coordinator

OFFICE OF PERSONNEL MANGEMENT COURSE OVERVIEW

Following is a listing of the Office of Personnel Management offered Courses, their Course Number and a Short Description. Please note the OPM courses all begin with 'HRD'.

Course Number	Course Name
HRD001	Administrative Law
HRD002	Advanced Creative Problem Solving
HRD003	Applied Leadership
HRD004	Awards and Recognitions
HRD005	Business Etiquette
HRD006	Challenges of Supervision
HRD007	Change Management
HRD008	The Changing Workplace
HRD009	Conducting Effective Group Meetings
HRD010	Controlling Budgets through Agency Risk Management
HRD011	Delegation and Control
HRD012	Developing Creative Problem Solving
HRD013	Developing Effective Negotiating Skills
HRD014	Disability Awareness
HRD015	Effective Communication in Management
HRD016	Effective Stress Management
HRD017	Effective Time Management Techniques
HRD018	Emotional Intelligence
HRD019	Ethics in Public Management
HRD020	Everyday Creativity
HRD021	Facilitation Skills
HRD022	Gender Issues in Management
HRD023	How to conduct On-the-Job Training
HRD024	Lateral Thinking for Supervisors
HRD025	Legislative Process
HRD026	Listening Skills for Managers
HRD027	Managing a Multigenerational Workforce
HRD028	Managing Conflict
HRD029	Managing Diversity in the Workplace
HRD030	Managing the Troubled Employee
HRD031	Motivating for Performance
HRD032	One Minute Manager

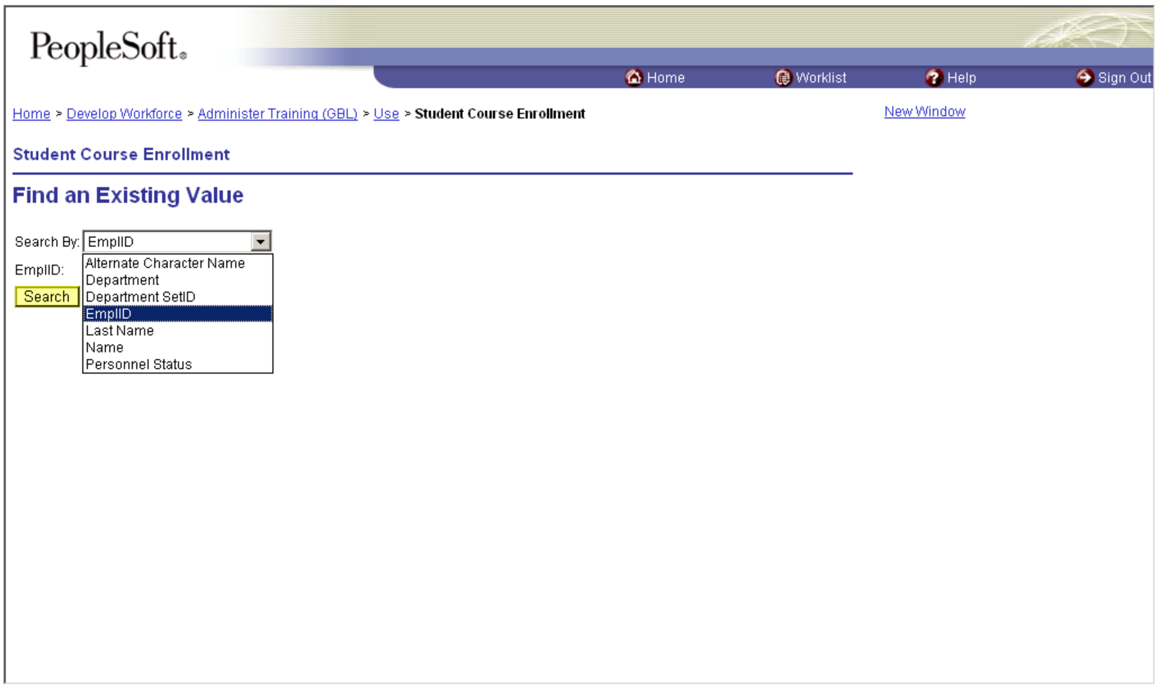
Course Number	Course Name
HRD033	Performance Management Process
HRD034	Personnel Policy and Practices
HRD035	Planning Skills for Managers
HRD036	Policy Analysis
HRD037	Program Evaluation
HRD038	Progressive Discipline
HRD039	Quality Oklahoma Processes
HRD040	Quality Tools
HRD041	Safety Management
HRD042	Sexual Harassment & Discrimination in the Workplace
HRD043	Skills for Effective Presentations
HRD044	Strategies for Improving Communication
HRD045	Structured Interview Process
HRD046	Team Building
HRD047	Violence in the Workplace
HRD048	World Trends
HRD049	Writing Skills for Managers
HRD050	Employee Grievances and Appeals
HRD051	Focus-Achieve Highest Priority
HRD052	7 Habits Highly Effective People
HRD053	7 Habits for Associates
HRD054	CPM Orientation
HRD055	CPM Project Writing
HRD056	CPM Executive Development Seminar
HRD057	Systems Management
HRD058	Managing in Public Sector
HRD059	Mediation Skills
HRD060	Certification Personnel Professional
HRD061	Customer Service: A Lost Art

ADMINISTER TRAINING SIGN IN

As with all other PeopleSoft applications, you will receive a User ID and Password for the Training Administration module from CORE Security. The Sign-In Screen example is provided below and is the same as other PeopleSoft sign-in applications.

STUDENT COURSE ENROLLMENT

STEP 1 – STUDENT ENROLLMENT



Navigation:
Home > Develop Workforce > Administer Training (GBL) > Use > Student Course Enrollment

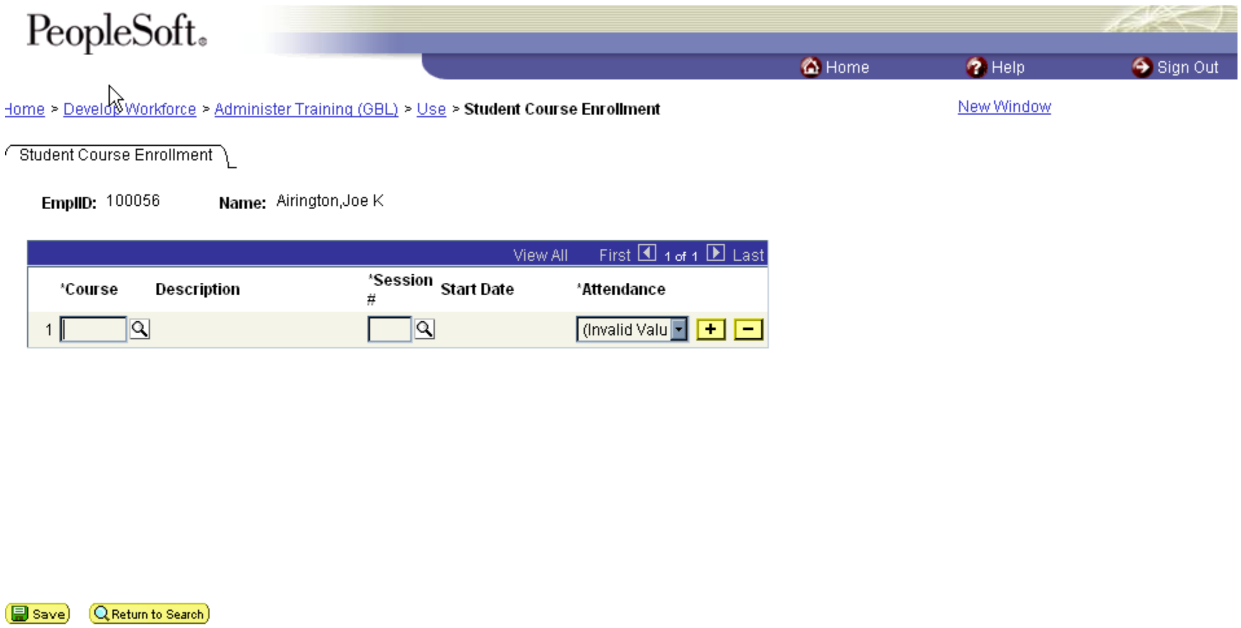
The Training Administration module uses the PeopleSoft Employee ID to enroll in a course; however, there are several options to look up an employee, if they have already been hired. The most effective option is to access an employee (or non-employee) directly with their Employee ID.

If you know the PeopleSoft Employee ID number, Click on the Search By: field and select EmplID, then enter the PeopleSoft Employee ID number.

Click Search.

You may also search by other options, but Last Name is a recommended choice.

STEP 2 – ENROLL EMPLOYEE



On the Student Course Enrollment Tab, Enter the Course Number.

Enter the Session Number.

Click on the Attendance Field and select Enrolled. <u>DO NOT</u> Type over an existing courses that have the employee has been enrolled. This is the system of record, and the history will be compromised.

To add additional Courses, Click + .

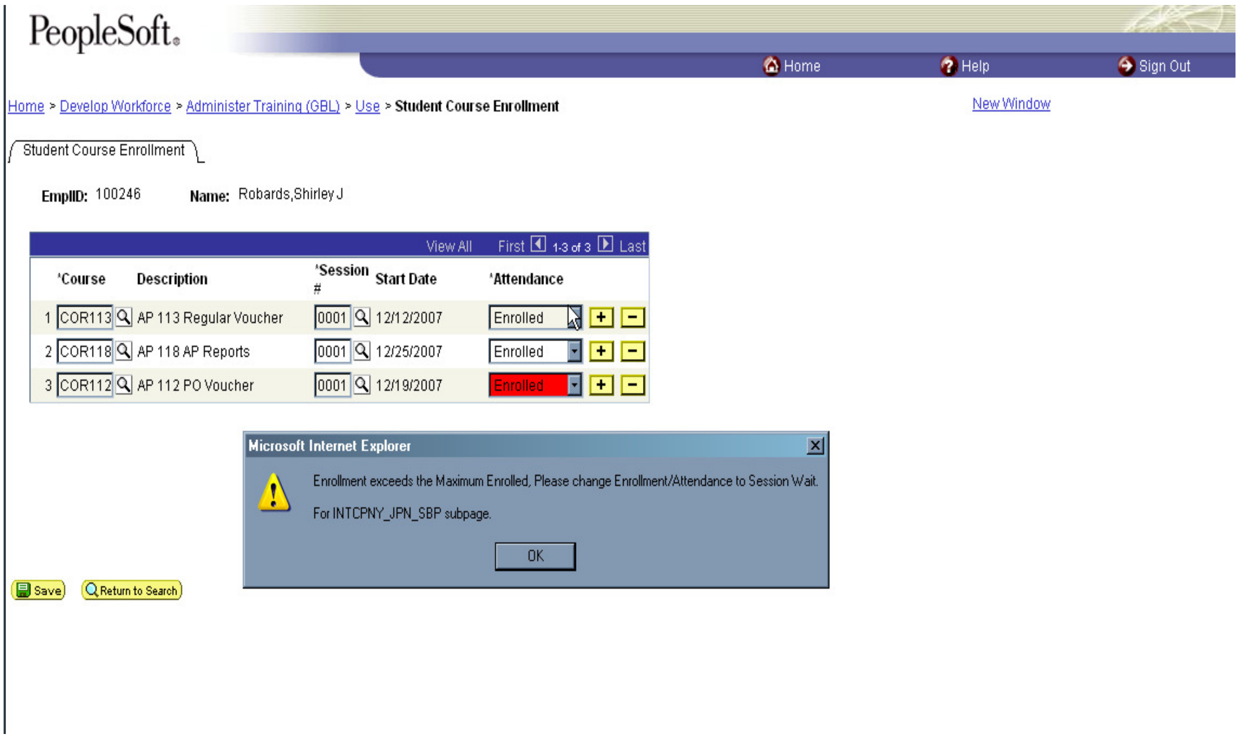
Enter the Course Number, Session Number and select Enrolled.

Click Save .

Warning Message: When there are AM and PM courses scheduled <u>on the same day</u> you will receive a warning message after you click Save . If the course has not been filled, the system will enroll the employee in the course selected by clicking OK.

Click Return to Search to enroll additional employees.

STEP 3 – COURSE SELECTION HAS BEEN FILLED

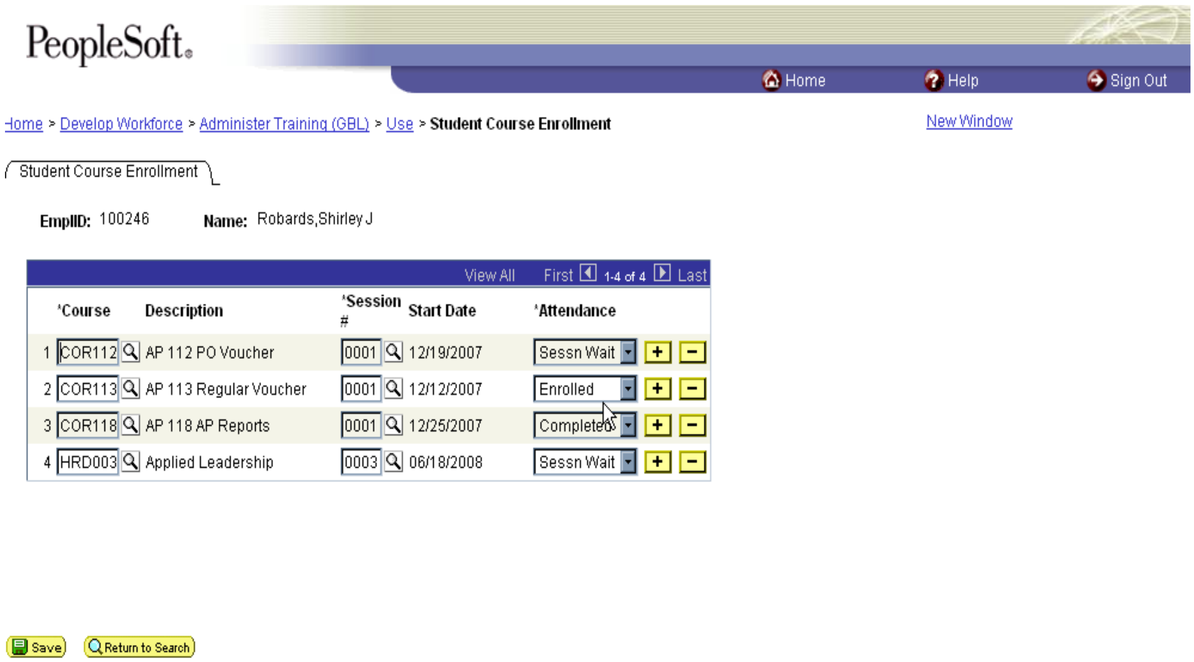


If the course has been filled, a warning sign will appear.

Click OK **and choose Session Wait in the Attendance Field and click** Save**.**

NOTE: For the OPM HRD Courses, as in the past, agencies will be limited to three (3) participants for each course. You may, however, add additional students to the Session Wait List or choose not to enroll employees in the course.

STEP 4 – COURSE SELECTION CHANGED TO SESSION WAIT



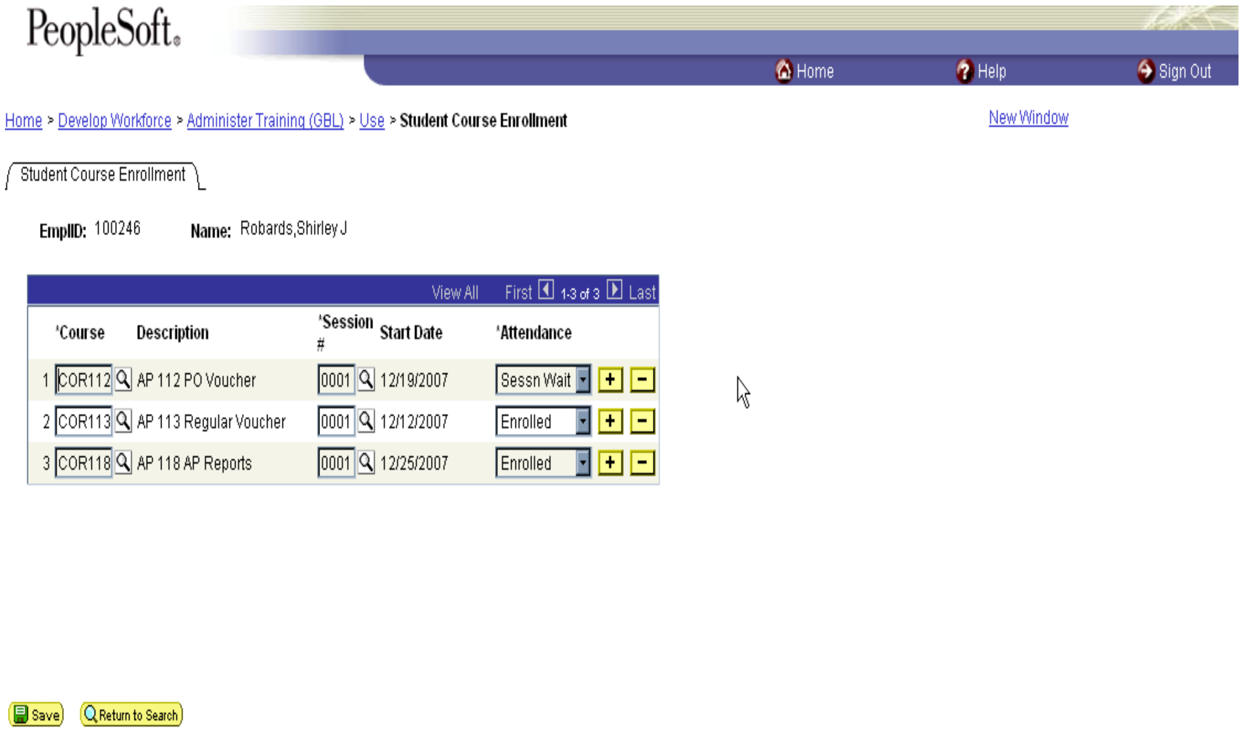
Select the drop down menu button on the Attendance Field and choose Sessn Wait button.

Click Save.

The Training Nominating Official will utilize the following designations in the Attendance Field: Enrolled, Dropped or Session Wait.

The following listing is a brief description of the Attendance Field Categories that the CORE Office and Office of Personnel Management will use to record course status.

Dropped –	**Course was dropped before the Course Date**
Enrolled –	**Employee enrolled in course and session**
Session Wait –	**Particular Course Session, employee placed on the Session Wait List**
Course Wait –	**Particular Course, employee placed on the Course Wait List**
Cancelled –	**Course was cancelled**
No Show –	**Employee did not attend the enrolled course**
Incomplete –	**Employee did not complete the enrolled course**
Completed –	**Employee completed the course**

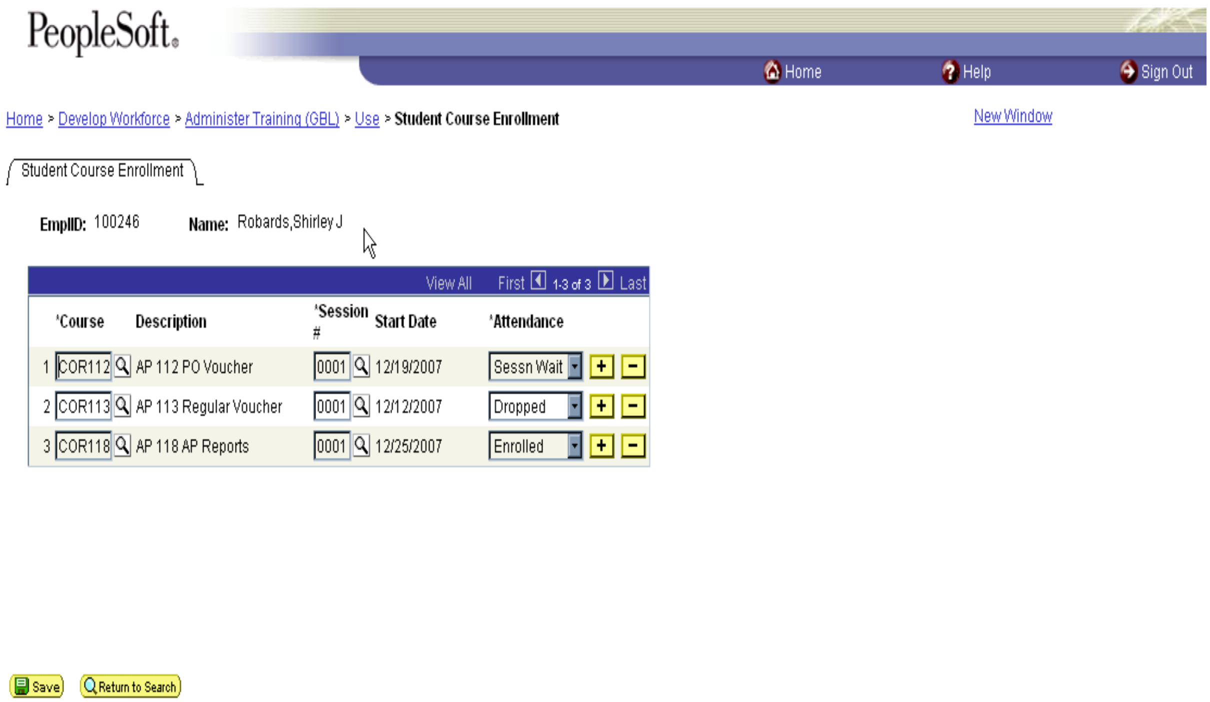


NOTE: The COR112 Course now reflects Sessn Wait **in the Attendance Field.**

The Course Session Wait List will be administered by the CORE Office and the Office of Personnel Management.

Notifications will be sent to the Agency Training Administrator for employees that are moved from the Session Waiting List to course Enrollment.

STEP 5 – DROP EMPLOYEE FROM ENROLLED COURSE



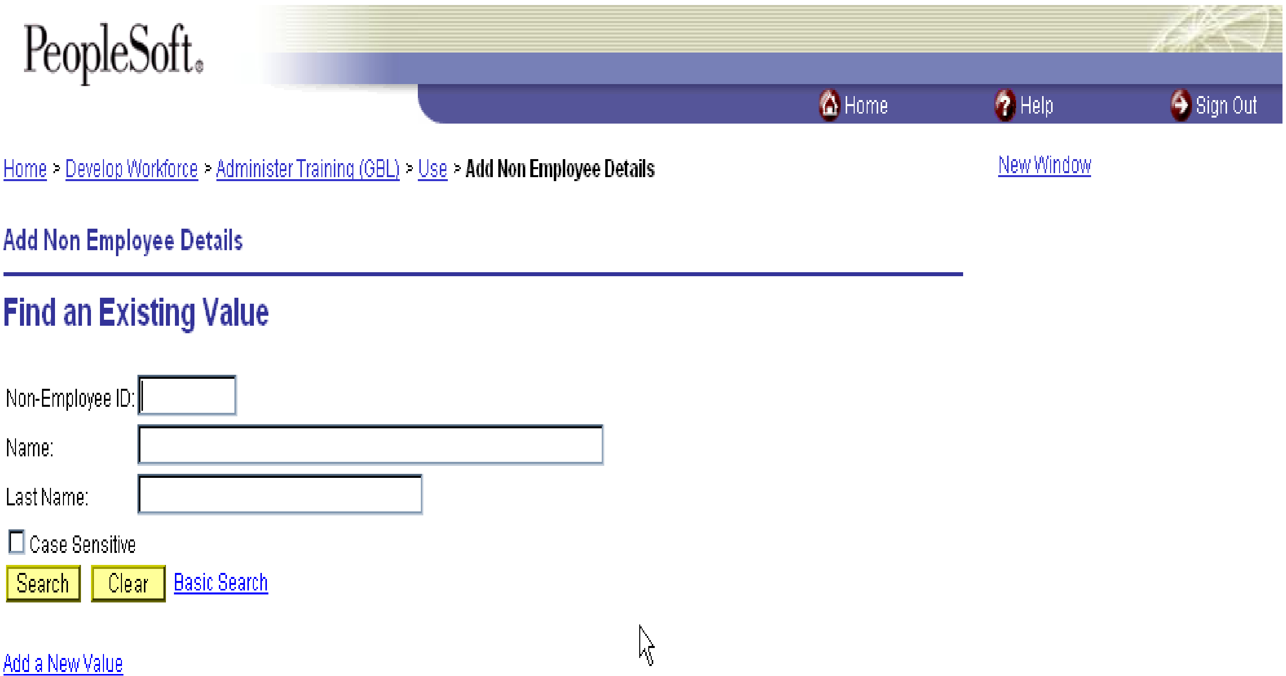
Select the drop down menu button on the course that the student needs to drop and choose Dropped.

Click Save .

NOTE: The COR113 Course reflects Dropped in the Attendance Field.

NOTE: <u>Never</u> use the − button to remove a course.

STEP 6 – ENROLL A NON-EMPLOYEE



Some agencies enroll Federal, City, and County "non-state employees" in HRDD courses. Following is the method to enroll the non-employees.

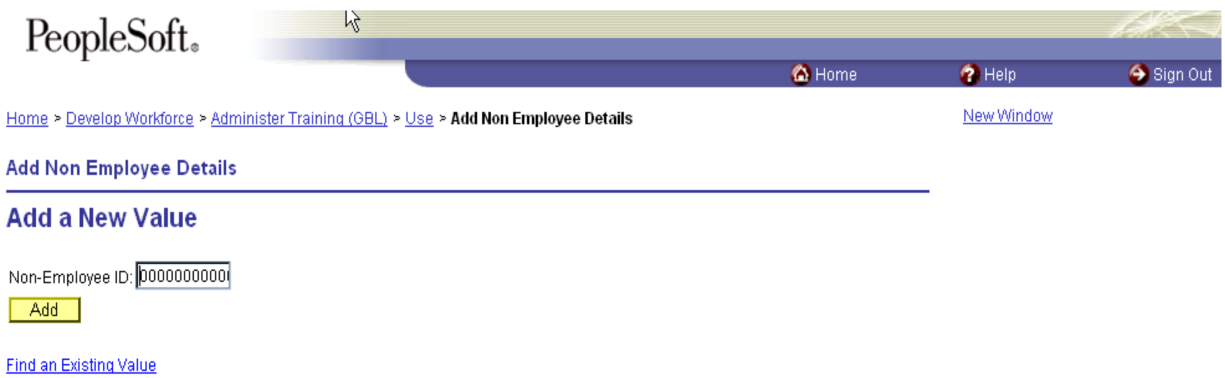
Navigation Path:
Home > Develop Workforce > Administer Training (GBL) > Use > Add Non Employee Details

Click Add a New Value **link.**

NOTE: After the system has been available to the Training Administrators for a time, the first choice for a lookup for a Non-Employee would be by Last Name.

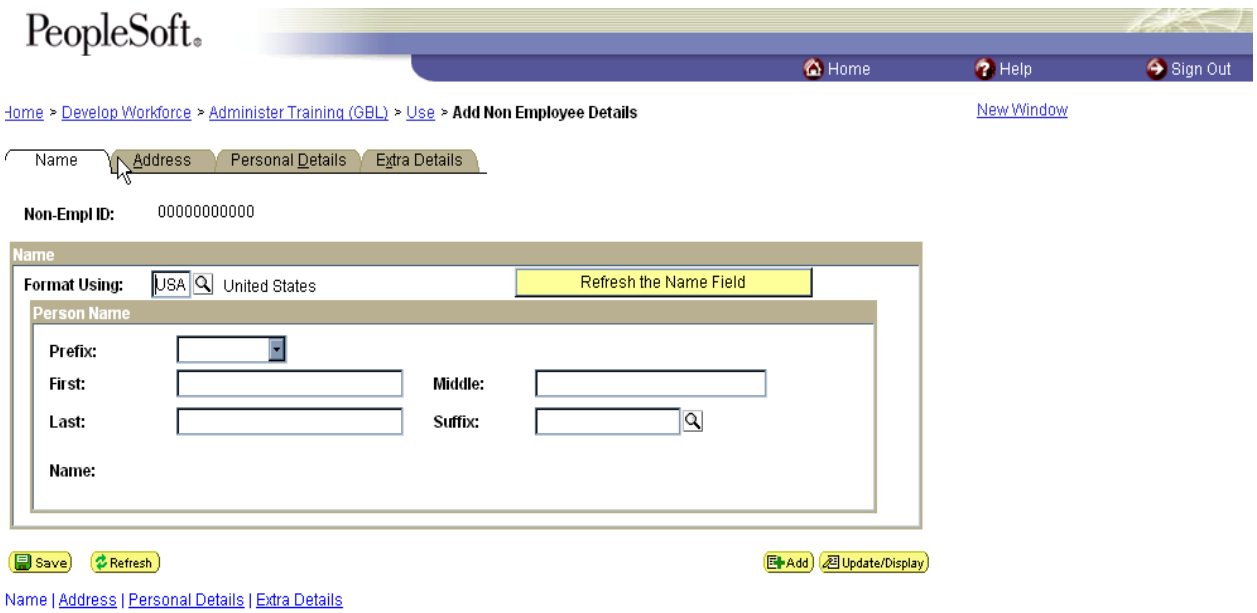
Enter last name.

Click Search**.**



Do not enter Non-Employee ID number, the system will assign the number when you save the "non-employee" details.

Click Add **.**



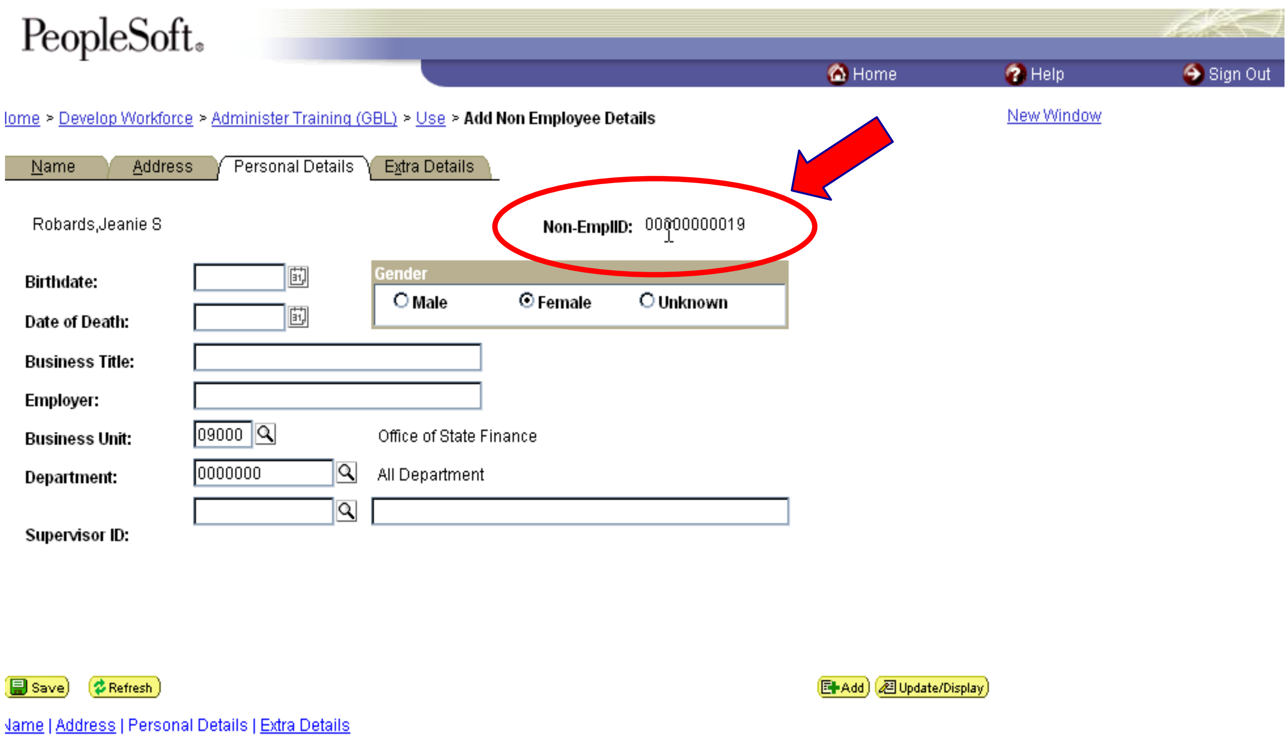
Enter First Name

Enter Middle Name or Initial

Enter Last Name

Click Refresh the Name Field

Click Personal Details **Tab**

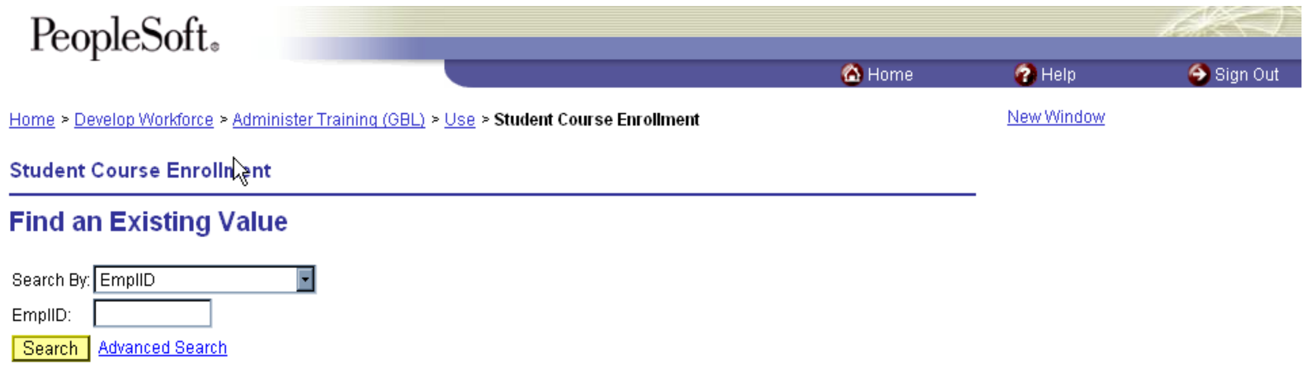


Complete the following fields:

Choose	**Gender**
Enter	**Business Unit Field – (Agency Number plus two (2) zeros)**
Enter	**Department Field – (Enter <u>seven</u> 0's)**
Click Save	

NOTE: **<u>Record the Non-EmplID Number</u> to enroll non-employee in courses.**

STEP 7 – EMPLOYEE SEARCH OPTIONS



The Administration Training Module uses the PeopleSoft Employee ID to enroll in a course; however, there are several options to look up an employee, if the employee has already been hired.

NOTE: The most effective search option; Use the button in the Search By field and enter Last Name.

You also can search by the following criteria(s) with the button on the Search By field.

- **PeopleSoft Employee ID Number**
- **Last Name**
- **Personnel Status – (Employee or Non-Employee)**

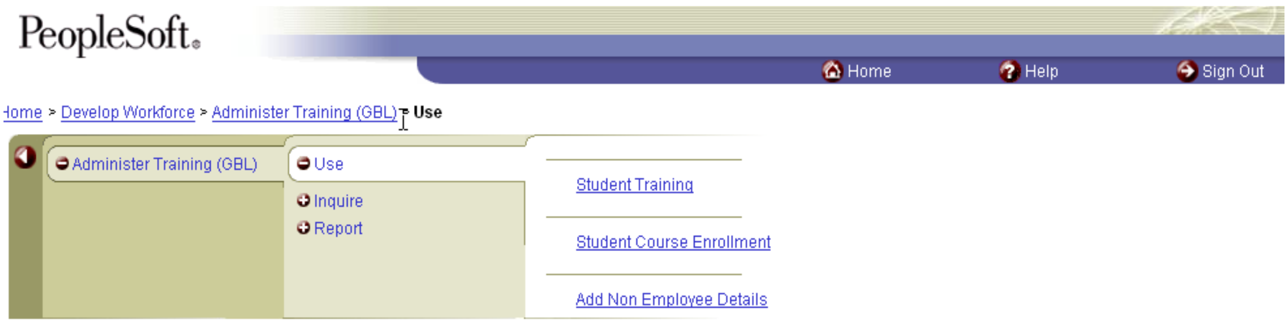
Another search option is the Advanced Search **. Enter the fields that will further refine your search and click** Search **.**

Enter **Last Name or,**
Employee ID, or
Department or
Personnel Status

Click Search**.**

Choose the correct employee on the Last Name ROBARDS **blue link.**

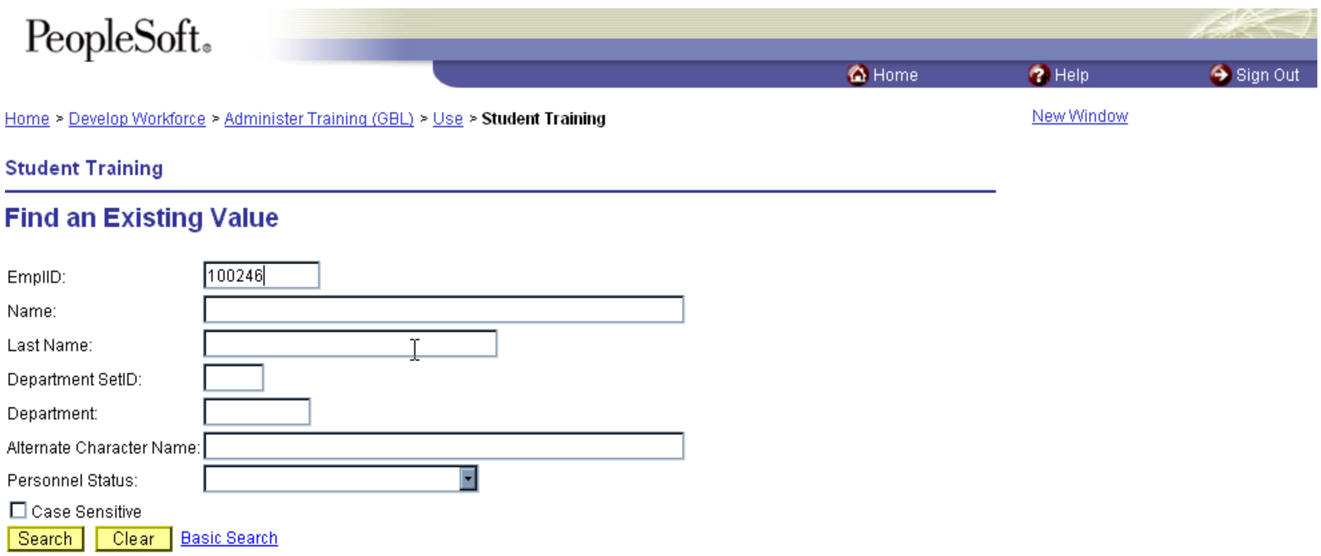
VIEW STUDENT TRAINING HISTORY



Navigation Path:
Home > Develop Workforce > Administer Training (GBL) > Use > Student Training

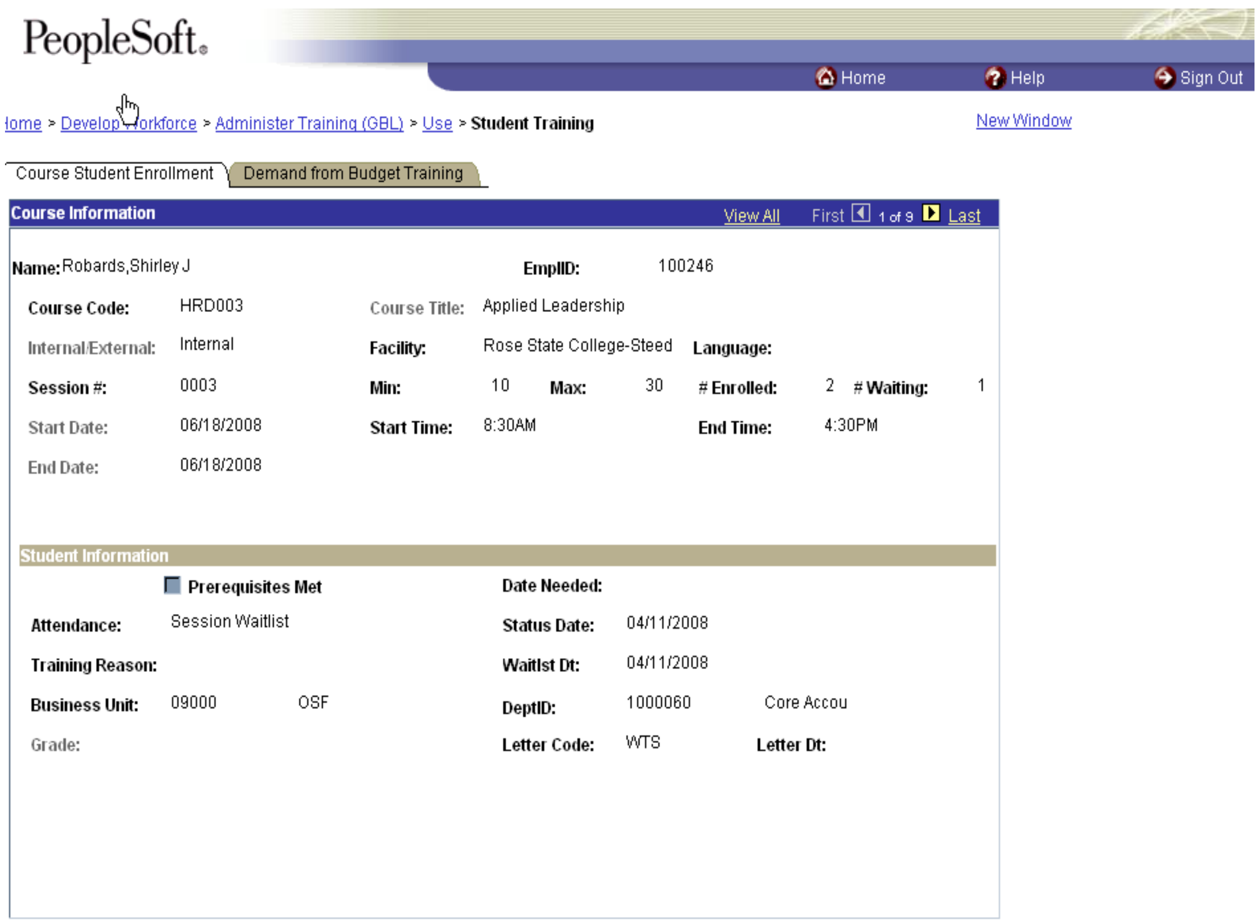
To view student history, click Student Training Link.

The Student Training screen provides information about enrollment status of each employee. The status of the courses for each employee could be in various stages for example; Enrolled, Completed, Dropped, Session Wait or No-Show.



Enter EmplId Number

Click Search

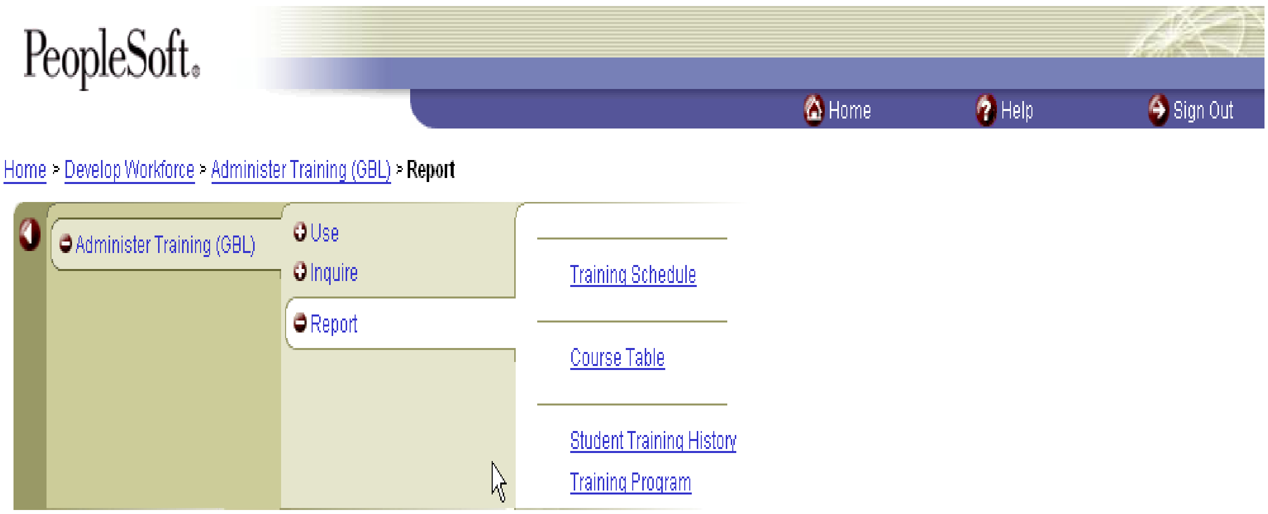


Click View All link to scroll through all the courses. The courses will be listed by date order.

NOTE: The course information will be displayed first, followed by the student information status, i.e., Enrolled, Dropped, No-show, Session Wait or Completed.

To review the history of another employee Course Student Enrollment, scroll to the bottom of the page and click Return to Search.

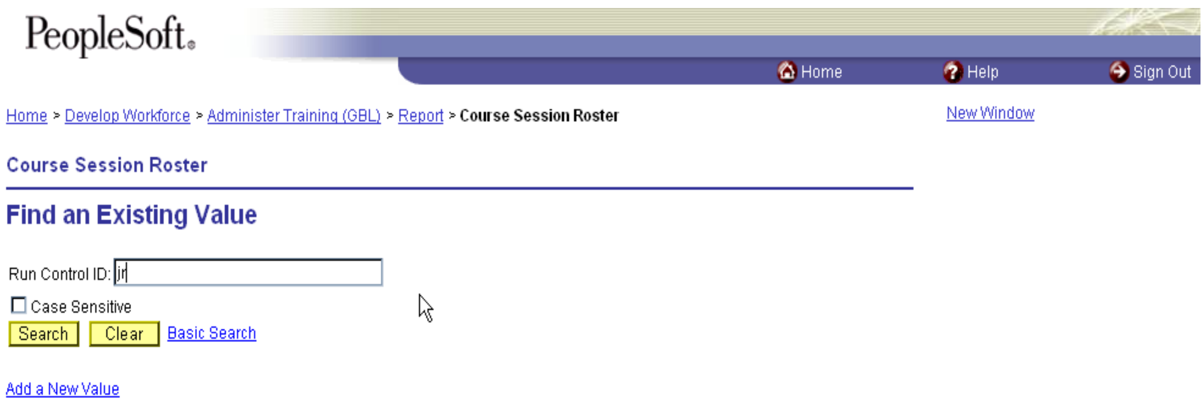
RUN REPORTS



Navigation Path:
Home > Develop Workforce > Administer Training (GBL) > Report

Reports available:
- **Training Schedule**
- **Course Table**
- **Student Training History**
- **Training Program**

STEP 1 – SET UP RUN CONTROL ID

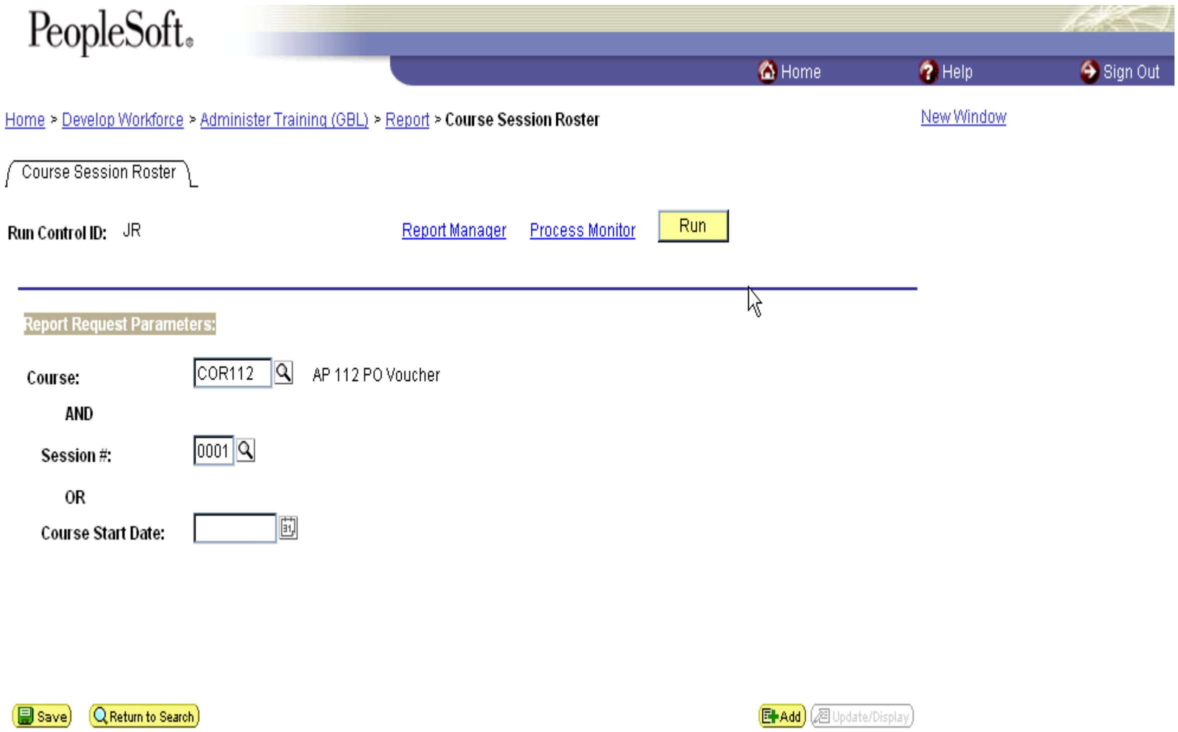


Run Control ID – Click Search and enter 'Run Control ID'.

A Run Control is a database record that provides values for these settings. Instead of entering the same values each time you run a report, you create (and save) a Run Control with those settings.

The next time you run the report, you select the Run Control, and the system fills in the settings. You only need to set up your Run Control ID once.

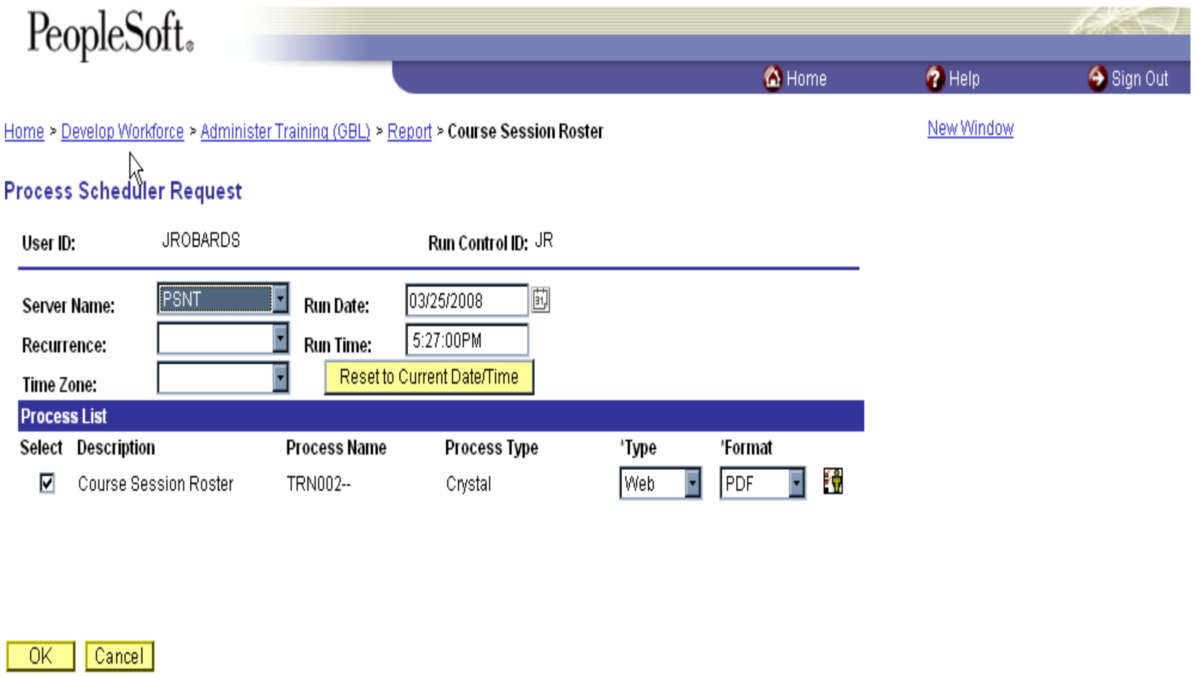
STEP 2 – SELECT COURSE AND SESSION



Select or enter the Course Number and select or enter the Session Number.

NOTE: In the above example COR112 and Session 0001 were used.

STEP 3 – CHOOSE SERVER AND FORMAT



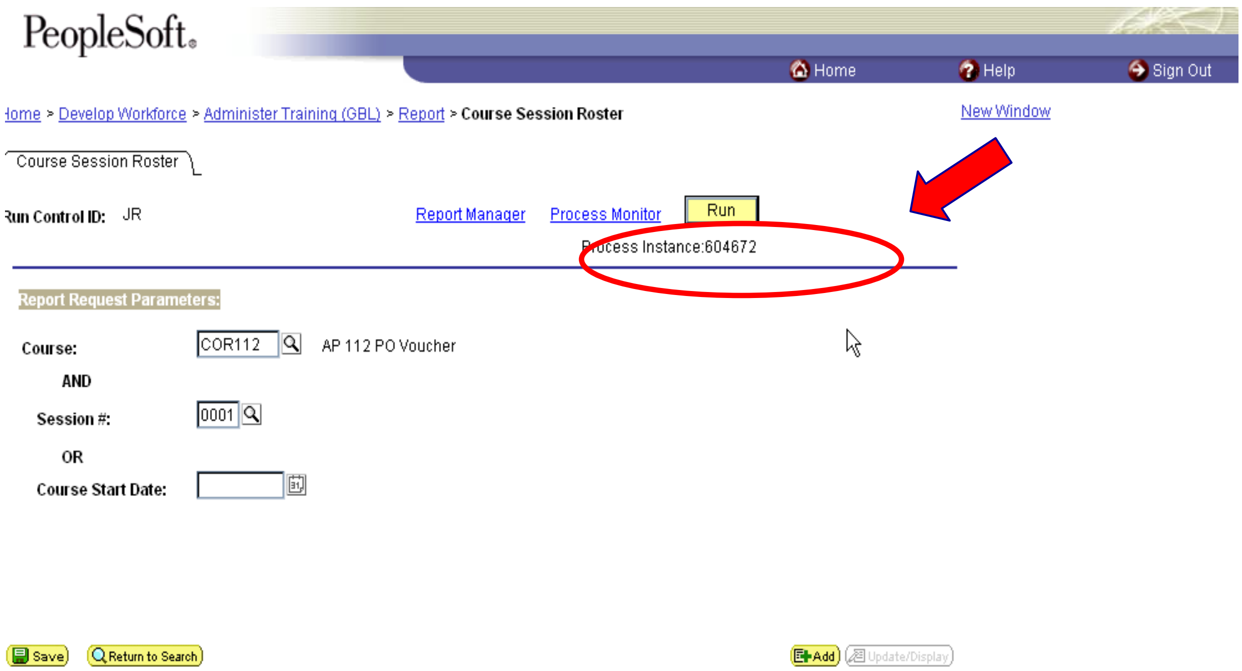
Choose Server Name: **PSNT**

Type: **Web**

Choose Format: **PDF**

Click OK **.**

STEP 4 – CHECK FOR PROCESS INSTANCE NUMBER

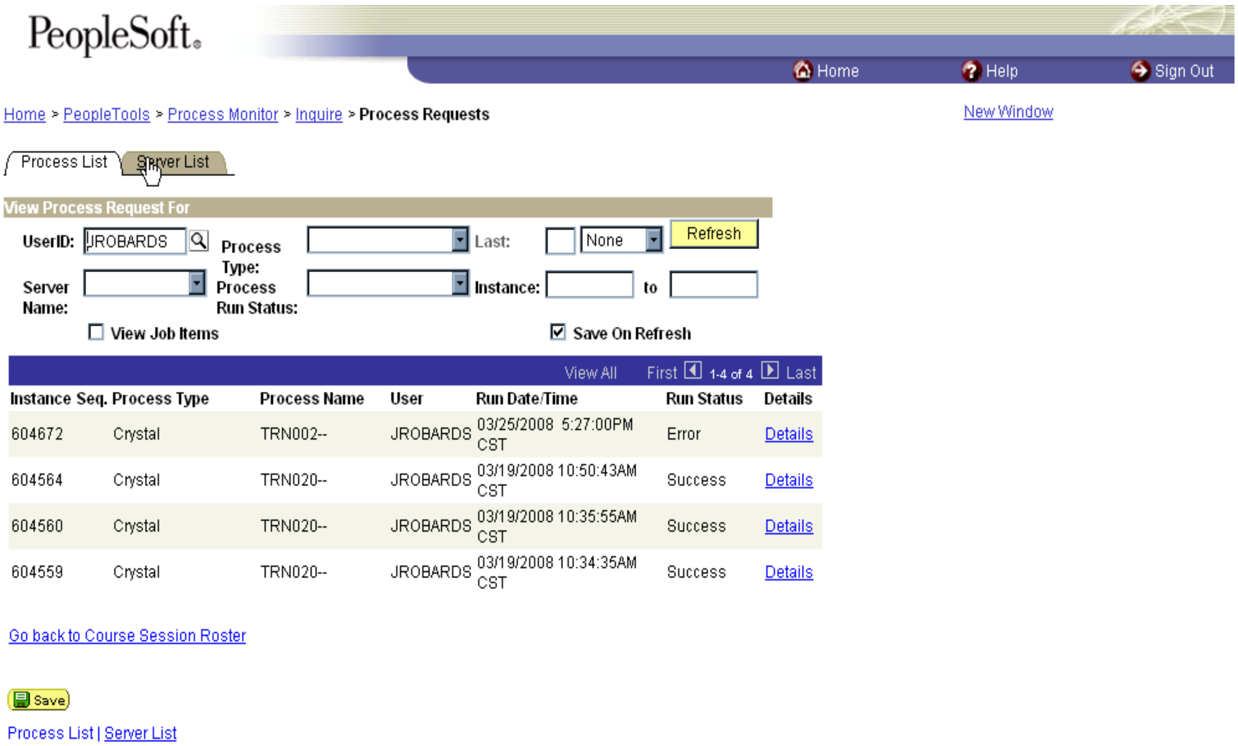


The system will provide a Process Instance Number. Note the number.

In this example the number is 604672. If there is a problem with the report, you will need to provide the Process Instance Number to the Help Desk Case for the Technical Team to address the problem.

Click Process Monitor Link.

STEP 5 – REFRESH FOR SUCCESS AND SEE DETAILS



Click Refresh button, repeatedly until the Report indicates Success in the Run Status field.

After the report has a status of Success, Click the Details link.

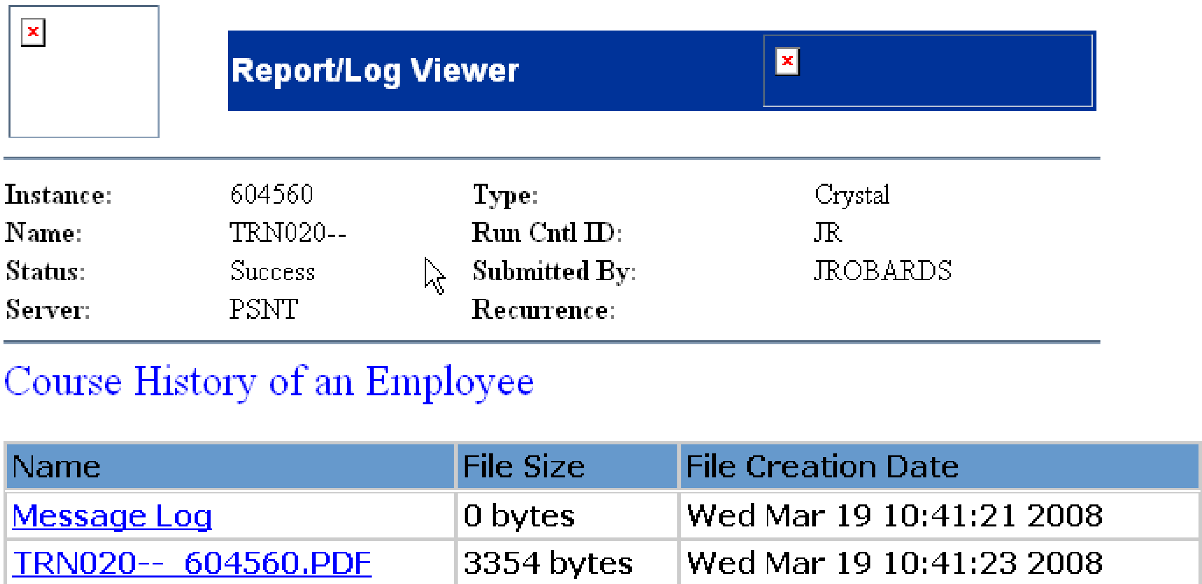
Run Status Values that could be seen as the system processes the reports:

Queued	**= waiting to start**
Initiated	**= starting**
Processing	**= running**
Posting	**= formatting report**
Success	**= finished**
Error	**= error**

STEP 6 – VIEW/LOG TRACE

Click View Log/Trace **Link.**

STEP 7 – CHOOSE REPORT



Report/Log Viewer

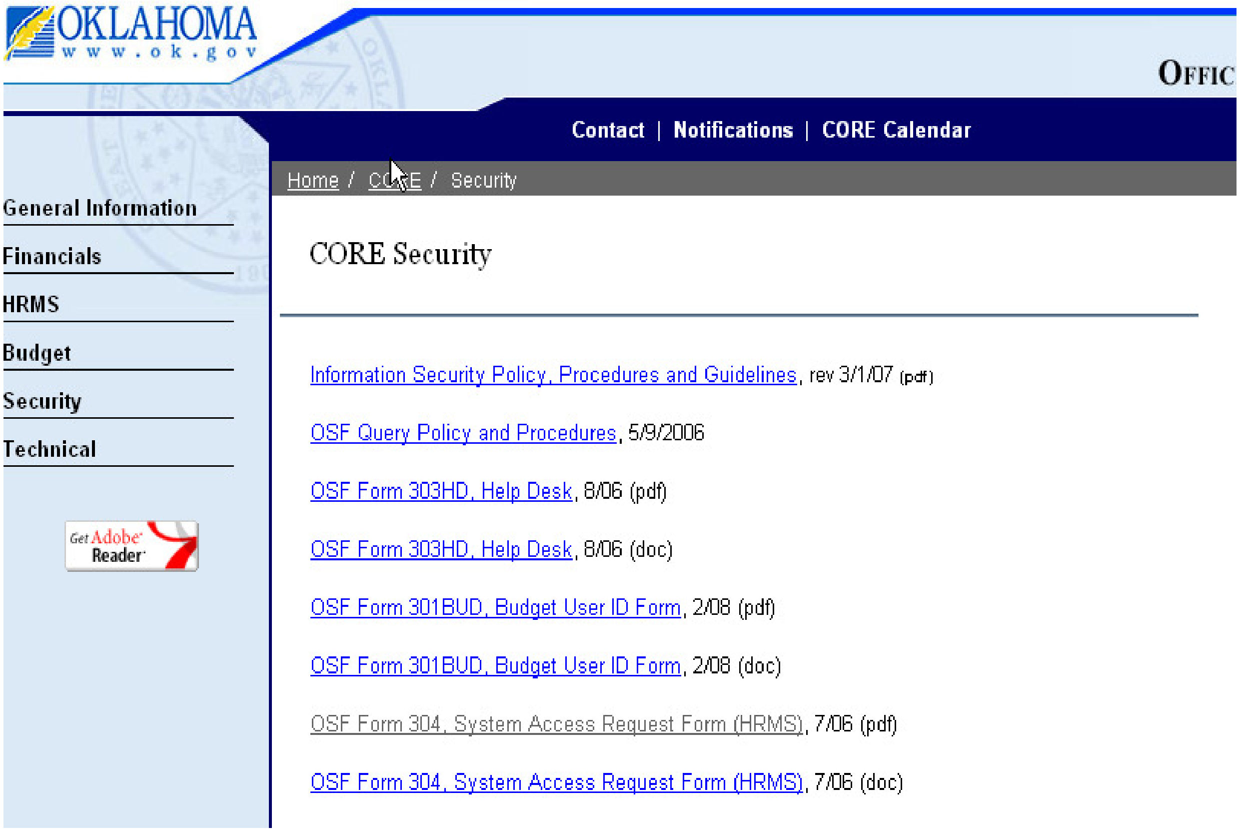
Instance:	604560	**Type:**	Crystal
Name:	TRN020--	**Run Cntl ID:**	JR
Status:	Success	**Submitted By:**	JROBARDS
Server:	PSNT	**Recurrence:**	

Course History of an Employee

Name	File Size	File Creation Date
Message Log	0 bytes	Wed Mar 19 10:41:21 2008
TRN020--_604560.PDF	3354 bytes	Wed Mar 19 10:41:23 2008

Under the Name column, choose the Link with the PDF file name to view the Report.

SECURITY ACCESS PROCESS



Training Nominating Officials for each agency will be required to submit a completed security form to gain access to the Administer Training Module.

The CORE Website has the Security OSF Form 304 (HRMS) (link provided below). Complete the form and return the Security Lead at the CORE Office. Check off both the Training Nomination Official and Run Query Box.

CORE Website Link OSF Form 304 (HRMS):
http://www.ok.gov/OSF/documents/osf304.pdf

OSF NOTIFICATION GROUPS

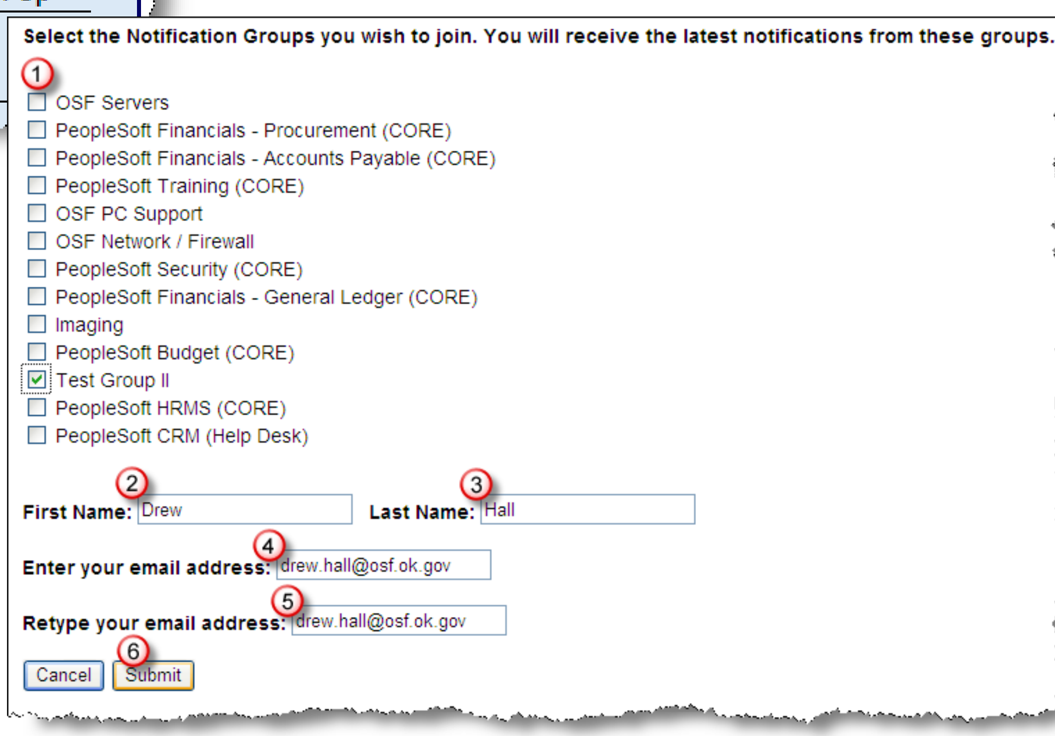
To ensure the agency Training Nominating Official(s) receives all the current information about managing their CORE training needs, the Office of State Finance maintains a Notification Group called PeopleSoft Training Nominating Official (CORE).

Initially, the designated PeopleSoft Training Nominating Official will be subscribed to the Notification Group. The following steps provide the Training Nominating Official the means to subscribe, unsubscribe or manually unsubscribe. The Notification Group will be the means by which CORE keeps you informed of CORE training and updates, changes and training opportunities.

STEP 1 – SUBSCRIBE

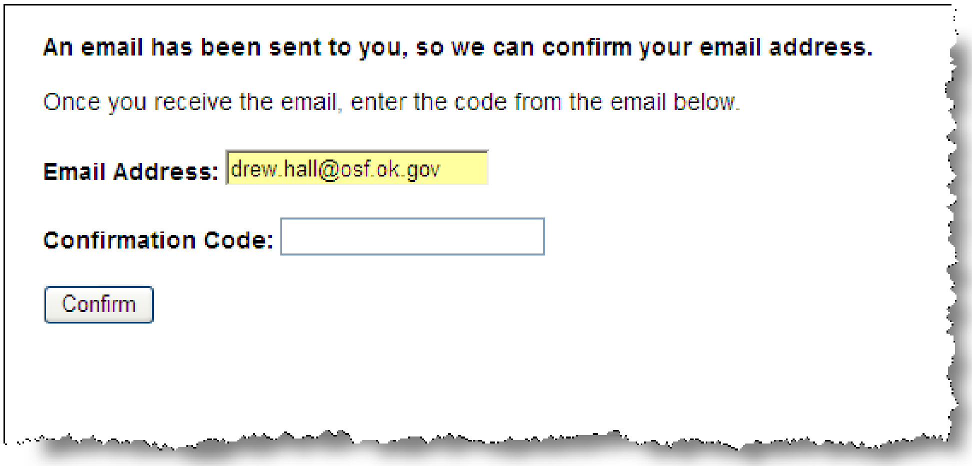
To sign up for notifications from the OSF Website go to http://ok.gov/OSF/

Select Notifications Sign Up

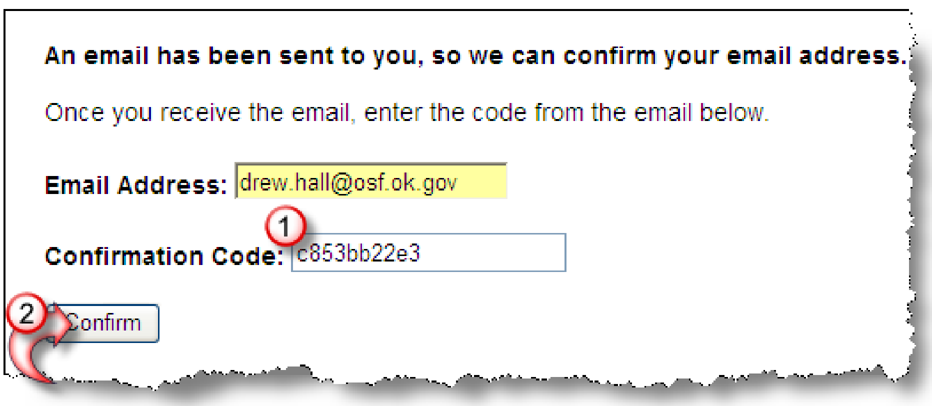


1) **Select** the group(s) desired.
2) **Enter** your first
3) **Enter** last name.
4) **Enter** your e-mail address.
5) **Re-enter** your email address
6) **Left Click Submit**

A confirmation screen will automatically populate your email address used to sign up.



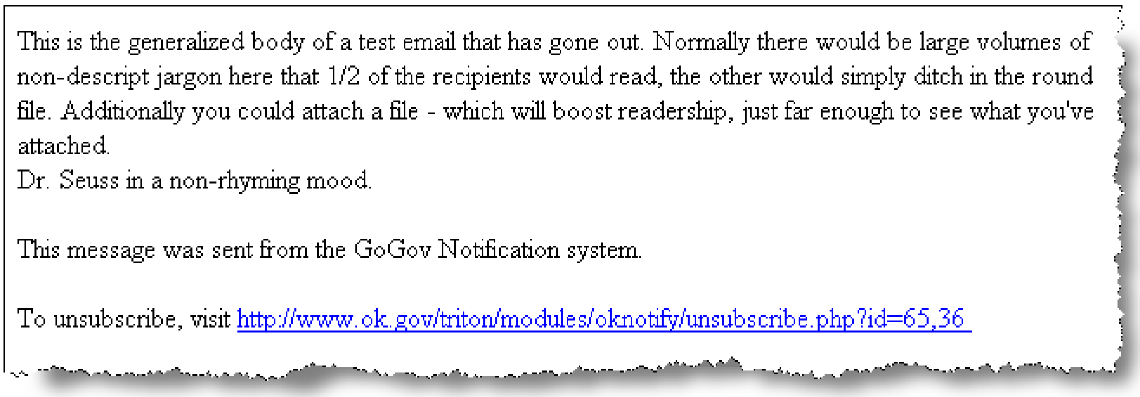
Once you receive the confirmation code in your email address, enter the code or copy/paste code from e-mail into the Confirmation Code Field. Left Click Confirm.



You will receive a message that reads,
"Your e-mail address has been subscribed! Thank you".

STEP 2 – UNSUBSCRIBE

Each time you receive an e-mail from OSF, the e-mail will afford you the opportunity to unsubscribe from that particular group. Left Click the link provided with each message sent.

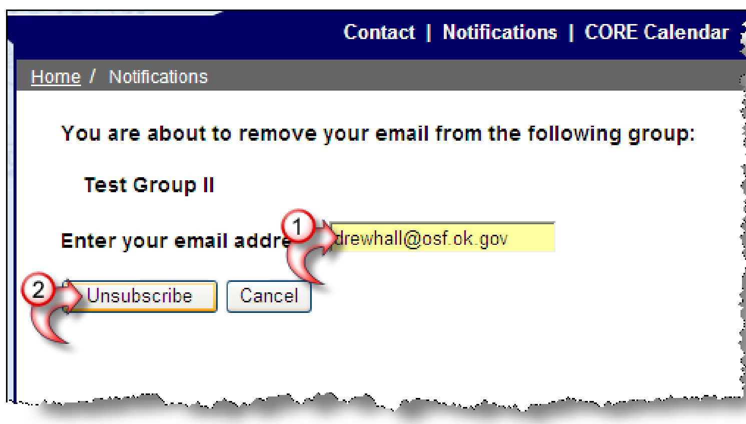

This is the generalized body of a test email that has gone out. Normally there would be large volumes of non-descript jargon here that 1/2 of the recipients would read, the other would simply ditch in the round file. Additionally you could attach a file - which will boost readership, just far enough to see what you've attached.
Dr. Seuss in a non-rhyming mood.

This message was sent from the GoGov Notification system.

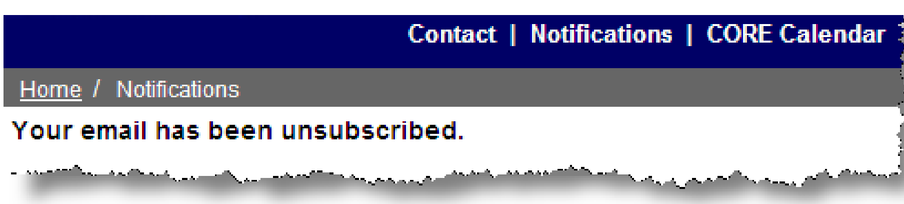
To unsubscribe, visit http://www.ok.gov/triton/modules/oknotify/unsubscribe.php?id=65,36

The link will take you to the unsubscribe area for that account.

1) Enter your email address
2) Left Click Unsubscribe**.**



If the entered email address is in that group's database, the system will automatically unsubscribe the e-mail from the group account and provide the confirmation message as seen on the right.



STEP 3 – MANUALLY UNSUBSCRIBE

In the event you would like to unsubscribe, but you do not have an email from that group, Left Click the Contact link at the top of the OSF web pages.

1) **Enter** your name
2) **Enter** e-mail address
3) **Select** "Unsubscribe from Notification Groups
4) In the Message box, identify the group(s) you would like to unsubscribe.
5) **Left Click** Send Message

NOTE: Alternately, you may e-mail the OSF Help Desk. **HelpDesk@Osf.Ok.Gov**