Infor10 HCM iEnterprise (Infinium)

Training Administration Guide to Setup and Processing

Publication Information

Release: Infor10 HCM iEnterprise (Infinium) 11.0

Publication date: February 27, 2012

Document code: 20120227170440

Table of Contents

About This Guide

This section focuses on the following information:

- Purpose of this guide
- Conventions used in this guide

Intended Audience

This document is written for all users of Infinium Training Administration (Infinium TR) including:

- Those who maintain Infinium TR controls
- Those who perform Infinium TR processing activities
- System administrators and others who provide technical support to Infinium TR users

Purpose of This Guide

You should use this guide as a reference at your site and also to complement the instructor's presentation during a portion of the Infinium Training Administration Application course.

Organization of This Guide

This guide is task oriented. We have grouped related tasks into parts. Each chapter contains overview information and step-by-step instructions to lead you through the tasks.

Conventions Used in This Guide

This section describes the following conventions we use in this guide:

- Fonts and wording
- Function keys
- Character-based and graphical-based screens
- Prompt and selection screens
- Promptable fields
- Infinium applications and abbreviations

Fonts and Wording

Convention	Description	Example
Italic typeface	Menu options and field names The guide uses the same abbreviations as the screen.	*Master Files* Use *Max Lnth* to specify the maximum length of alpha user fields.
Bold standard typeface	Used for notes, cautions and warnings	**Caution:** You must ensure that all Infinium PY users are signed off before reorganizing and purging. If there are jobs in the queue, those files will not be reorganized.
Bold monospaced typeface	Characters that you type and messages that are displayed	Type **Infinium PY** in the *System* field. The following message is displayed: **Company not found**
F2 through F24	Keyboard function keys used to perform a variety of commands.	Press F2 to display a list of available function keys.
F13 through F24	Function keys higher than F12 require you to hold down the Shift key and press the key that has the number you require minus 12.	Press F16 to update the journal.

Convention	Description	Example
Select	Choose a menu option or choose a record or field value after prompting.	Select *Employer Controls.* Select a record. From the *List* menu, select *Display*.
Press Enter	Provide information on a screen and when you have finished, press Enter to save your entries and continue.	Press Enter to save your changes and continue.
Exit	Exit a screen or function, usually to return to a prior selection list or menu. May require exiting multiple screens in sequence.	Press F3 to return to the main menu.
Cancel	Cancel the work at the current screen or dialog box, usually to return to the prior screen.	Press F12 to cancel your entries.
Help	To access online help for the current context (menu option, screen or field), press Help (or the function key mapped for help). To move through the other applicable levels of help, press Enter at each help screen. To return directly to the screen from which you accessed help, exit the help screen by clicking Exit or by pressing F3.	Press Help for more information about the current field.

Convention	Description	Example
[Quick Access Code]	Quick access codes provide direct access to functions. Most quick access codes in Infinium Payroll consist of the first letter of each word of the menu option name. Quick access codes are listed on the Menu Tree and in the path for each task next to the executable function.	Select *Update Employer Controls* [UCO].
Publication and course titles	Unless otherwise stated, titles refer to Infinium applications and use standard name and abbreviations.	*Infinium Training Administration Guide to Setup and Processing* is referred to as *Infinium TR Guide to Setup and Processing.*

Function Keys

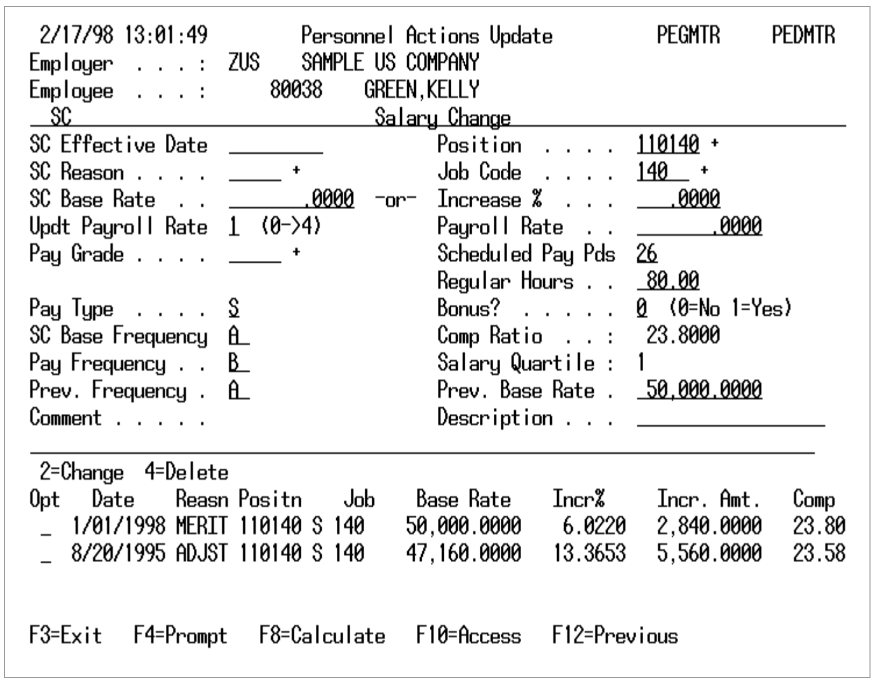
Infinium AM function keys and universal Infinium PY function keys for the IBM System i are described in the following table. All Infinium PY function keys are identified at the bottom of each screen.

Function Key	Name	Description
F1	Help	Displays help text
F2	Function keys	Displays window of valid function keys
F3	Exit	Returns you to the main menu
F4	Prompt	Displays a list of values from which you can select a valid entry
F10	Quick Access	Enables you to access another function from any screen
F12	Cancel	Returns you to the previous screen

Function Key	Name	Description
F22	Delete	Deletes selected item(s)
F24	More keys	Displays additional function keys at the bottom of the screen

Character-based and Graphical-based Screens

The sample screens in this guide may be either character-based or graphical-based. Samples of both are included below.



```
 2/17/98 13:01:49         Personnel Actions Update          PEGMTR     PEDMTR
Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80038    GREEN,KELLY
  SC                               Salary Change
SC Effective Date  ________             Position  . . . .  110140 +
SC Reason . . . .  _____ +              Job Code  . . . .  140__ +
SC Base Rate  . .  _______.0000  -or-   Increase % . . .  ___.0000
Updt Payroll Rate  1  (0->4)            Payroll Rate  . .  _______.0000
Pay Grade . . . .  _____ +              Scheduled Pay Pds  26
                                        Regular Hours . .  _80.00
Pay Type  . . . .  S                    Bonus?  . . . . .  0  (0=No 1=Yes)
SC Base Frequency  A_                   Comp Ratio  . . :   23.8000
Pay Frequency . .  B_                   Salary Quartile :  1
Prev. Frequency .  A_                   Prev. Base Rate .  _50,000.0000
Comment . . . . .                       Description . . .  ________________

 2=Change  4=Delete
Opt   Date    Reasn Positn   Job   Base Rate    Incr%    Incr. Amt.   Comp
 _  1/01/1998 MERIT 110140 S 140  50,000.0000   6.0220  2,840.0000  23.80
 _  8/20/1995 ADJST 110140 S 140  47,160.0000  13.3653  5,560.0000  23.58


F3=Exit   F4=Prompt   F8=Calculate   F10=Access   F12=Previous
```

Figure 1: Sample character-based screen for Infinium HR suite

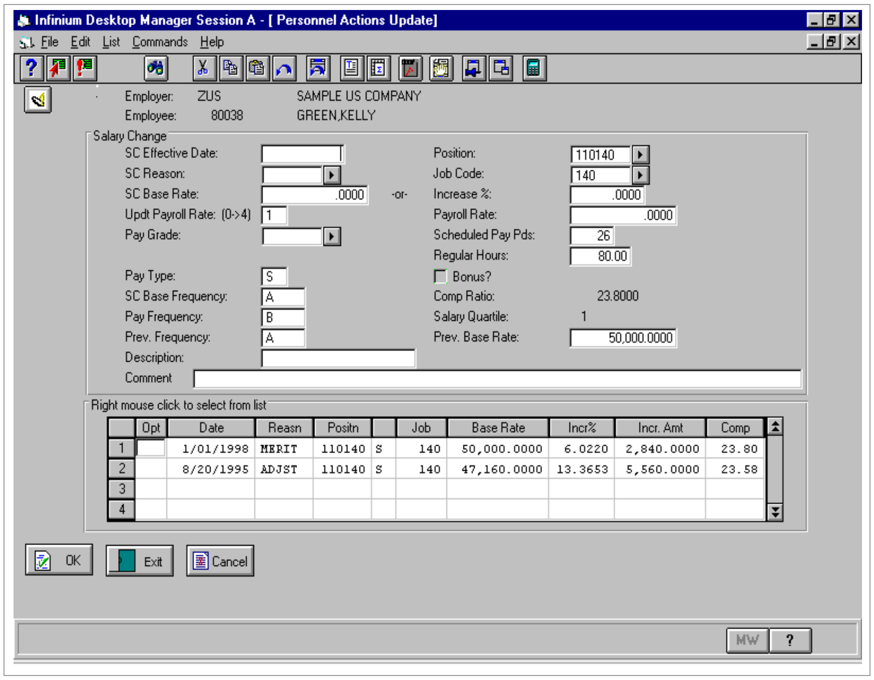


Figure 2: Sample graphical-based screen for Infinium HR suite

Prompt and Selection Screens

A prompt screen, similar to Figure 3, is the screen in which you type information to access a record or a subset of records in a file.

A selection screen, similar to Figure 4, is the screen from which you select a record or records to perform an action.

When we first explain a task in this guide, we fully document how you access a prompt and selection screen. If a related task uses that prompt or selection screen, we include the prompt and selection steps in that task. However, we do not include the screen(s) again.

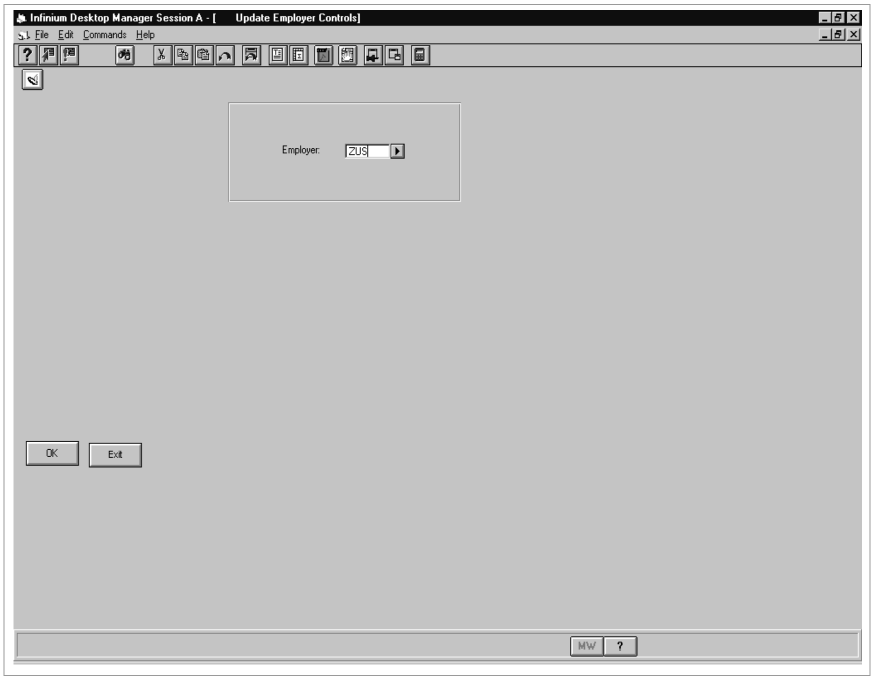


Figure 3: PY prompt screen

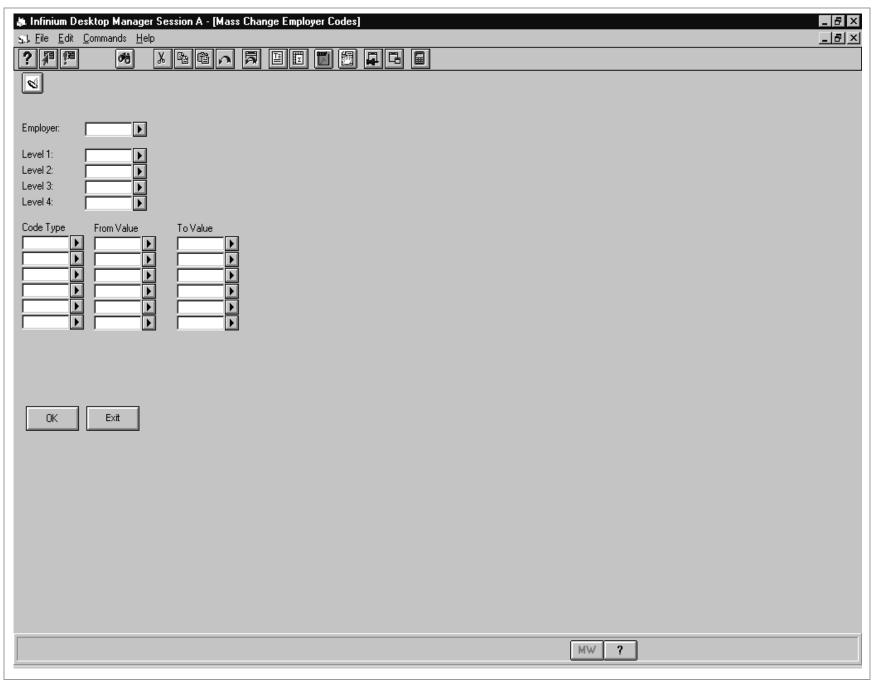


Figure 4: PY selection screen

Promptable Fields

A plus sign displayed next to a field indicates that you can choose your entry from a list of possible values. Place the cursor in the field and press F4 to display a list of values.

To select an entry perform one of the following:

- Position the cursor at the desired value, type `1` and press Enter.
- Type the value in the appropriate field.

Infinium Applications and Abbreviations

The following table lists Infinium names and the corresponding product abbreviations that are associated with this product.

Application	Abgreviation
Infinium Application Manager Infinium Application Manager Extended	Infinium AM Infinium AM/X
Infinium Query Infinium Query Extended	Infinium QY Infinium QY/X
Infinium Financial Management Suite	**Infinium FM**
Infinium General Ledger	Infinium GL
Infinium Payables Ledger	Infinium PL
Infinium Project Accounting	Infinium PA
Infinium Human Resources Suite	**Infinium HR**
Infinium Flexible Benefits	Infinium FB
Infinium Human Resources	Infinium HR
Infinium Human Resources/Payroll	Infinium HR/PY
Infinium Payroll	Infinium PY
Infinium Training Administration	Infinium TR

Related Documentation

For further information about the Infinium TR system, refer to the following relevant documents:

- *Infinium Human Resources Guide to Processing*

- *Infinium Guide to Query*
- *Infinium Query Security Guide*
- Program Reference Guide
- File/Field Descriptions
- Database Relations
- Online help

Installation instructions and release notes are available on Infor365 Online Support.

Notes

Chapter 1 Infinium TR: An Overview

1

The chapter consists of the following topics:

Product Information

Infinium TR provides a training course administration system and an employee training record keeping system. Infinium TR itself is fully integrated with the Infinium HR product and database.

Infinium TR uses the current Infinium HR employer and employee database and its programs. It uses these for both the display of relevant personnel data and also for validation and security checking of employer/employee numbers on training records.

Infinium TR also uses the Infinium HR organizational structures, such as positions and job codes. This tight integration ensures the integrity of your employee training records.

Application Overview

Infinium TR Controls

Course Master

These records define in detail all your organization's training courses and training programs, including full course descriptions and objectives.

Sessions

These records define the individual sessions within each training course (optional).

Tests

These records specify details of any tests needed as part of a training course (optional).

Providers

These records define the details of all your course providers with name, address and contact information.

Locations and Classrooms

These records establish the details of your course locations and available classrooms.

Instructors

These records define all your course instructors, internal or external, and the courses they are qualified to teach.

Training Groups

These records define sets of linked training courses. You typically use training groups to define the required training courses for particular positions in your organization. The same course can be in multiple training groups.

Course Schedules

These records define the dates and times required, including classrooms to be used, minimum and maximum class sizes, instructors to be used, and so forth for the course.

The system provides useful copy functions for regular courses that differ only by dates, instructors, and times. Strict validation ensures against double booking of classrooms, instructors, or equipment.

Equipment

These records define the reservation of any special equipment needed for a course; for example, overhead projectors, video players.

Calendars

You can use these records to view daily classroom, equipment, and instructor usage and their availability in an easy-to-use calendar format with drill down capability to view detailed course information. Classrooms, equipment and instructors can be made unavailable on particular dates.

Course Security

You create these records to authorize users of Infinium TR to see and work with specific courses.

Employee Training Record Keeping System

Training Needs and Requests

You can record and track your employees’ training needs and requests. You can then use this data for planning your courses and for course enrollments.

Automatic Generation of Training Needs

The system can also automatically create employee training needs and requests at the time of hire or when the employee's position changes, based on the training requirements of the position or when the employee is due for refresher training.

You can also mass generate training requests for selected groups of employees or all employees; for example, when you introduce a new training initiative.

Course Enrollments

You can enroll your employees into the courses you have scheduled. The enrollment process provides flexibility and efficiency. You can:

- Manually enter enrollments, either singly or on a mass entry screen
- Mass or multiple select enrollments from the training requests database
- Mass select enrollments from the employee database; for example, you can enroll everyone in a particular department
- Request the system to automatically enroll employees into available places in scheduled courses based on the training request database. A trial option lets you see the results before you actually enroll employees. You can also use the trial feature as a course planning tool.
- Enroll and track the course attendance of people who are not on your employee database, such as consultants or customers.

Rescheduled Courses

You can easily reschedule courses to a new date and time, including all the course enrollments and equipment.

Course Attendance

You need to enter only attendance exceptions; for example, employees who did not show up or any last minute additions. If the course involves tests or grading, you can also enter the actual employee results.

Training History

The system keeps a comprehensive history of employees' training. You can mass create this training history interactively for multiple employees based on the course enrollment and attendance data, or you can manually enter the individual training records.

Training Profile

You can also view current employee training needs and requests and any current course enrollments from the display of an employee’s actual training history. You can also view the status of any required training as defined by the employee’s training group.

Untrained Employees

You can determine those employees who have not been trained in a particular course rather than those who have. The system allows you to easily find these untrained employees and it also provides selections by organizational levels. For example, you could find everyone in a particular department who had not taken a specific course.

Training Costs

You can track the full details of any costs incurred during training, either at the employee level, such as travel expenses, or at the course level. You can also set up training cost records to be automatically created by the system.

A powerful inquiry function lets you analyze your training costs with multiple views and selections available. You can also track the costs of external employee attendees, non-employees.

Standard Reports

The system provides many standard reports, each with multiple selection options. The key reports include:

Classroom Schedule

This report lists by classroom, full details of all courses scheduled in the room, in date order.

Instructor Schedule

This report lists for each instructor, full details of all courses they are scheduled to teach, in date order.

Course Sign-in Sheets

Use this report as a list of enrolled employees for recording and signing off course attendance.

Courses

This report lists all the information about your courses, including full course descriptions.

Employee Training History

This report shows the employees' training history records and optionally their current training requests and course enrollments. Many selections are available; for example, you can print the report for an individual employee or for all employees in a department.

Infinium TR Supported Training

Infinium TR is designed to support all types of training. Examples of how you might use the system include:

- Classroom-based training
- On-the-job training programs
- One-on-one instruction, such as machine operations
- Laboratory procedures
- External college courses
- Self-study video/audio learning

Stages in the Training Cycle

The four stages in the training cycle are:

- Training Requests
- Course Enrollments
- Attendance
- Training History

However, since all of these stages are not appropriate for certain types of training, Infinium TR allows you to enter your training records at whichever stage is appropriate. The first three stages are optional.

You can bypass stages for non-classroom based training. For example, if an employee has attended an external training course at a local college, you do not have to schedule the course, enroll the employee and confirm attendance in order to create training history. Instead, you can directly enter the record into the employee's training history.

Similarly, if an employee has taken a self-study video course or received individual instruction, you can record this directly into his training history, bypassing the requests, enrollments, and attendance stages. However, in this example, if the employee did have a training request record, you could also access that training request and create the training history directly from there, by-passing the enrollment and attendance stages.

Typically, only your internal, classroom-based, training courses utilize all four training stages, and some of these may not need or use the training request stage. When you are enrolling employees into scheduled courses, the system does not require you to use training requests. You can simply key in or select the employees to be enrolled from your employee database.

Relationship of Infinium TR with Infinium HR

The real power of Infinium TR lies in its integration with the employee database in Infinium HR.

Shared Employee Database

When a new hire is added in Infinium HR, that employee is immediately accessible to Infinium TR because both systems share the same employee database. The same applies when employees are terminated. They immediately become inactive employees in Infinium TR, ensuring that they are not enrolled into courses.

Shared Infinium HR Programs

The integration with Infinium HR not only allows the employee database to be shared, but it also allows Infinium HR programs to be used. For example, when you perform F4 prompts on an employee number or name or on levels or job codes, you access the same programs used by Infinium HR for those fields.

Validation

The shared employee database and programs ensure that the system automatically validates all personnel related fields, such as employer and employee numbers on your training records.

Infinium HR Security

The same employee and employer level security checks by user profile as established in Infinium HR are also applied in Infinium TR.

Automatic Generation of Training Requests from Infinium HR

The integration of the Infinium HR and Infinium TR systems provides the automatic generation of training requests from two key functions in Infinium HR. These are:

- *Enter New Hire*
- Enter Personnel Actions

This automatic generation of training requests is controlled by the *Training Group* field on the position record within Infinium HR. In Infinium TR you create training group code values and define each code value to represent a particular set of required training courses. By entering a training group code value on the position record in Infinium HR, you can link the position with a set of required training courses.

You need to define only once, in a training group called *CORE, your general training courses that are not specific to positions but are required for all employees. This *CORE training group acts as a second training group for employees.

When you enter a new hire into Infinium HR, if the position the new employee is being hired for has a training group code associated with it, the system automatically creates training requests for the employee for each course in that training group.

When there are personnel action updates in Infinium HR that involve a change of position (promotion, demotion or transfer), and if that changed-to position has a training group code associated with it, the system automatically creates any new training requests required for the employee for each course in the new training group.

When an employee is terminated in Infinium HR, Infinium TR automatically deletes his or her training requests and enrollments.

Automatic Processing of Training Data

Infinium TR is specifically designed to help large organizations manage their training data by minimizing the data entry requirements and automating as much of the training record keeping function as possible.

The automatic generation of training requests, as discussed in the preceding section, is just one example of this. Other similar functions include:

- *Mass Creating Training Requests* (batch)
- *Mass Creating Enrollments* (batch)
- *Copying Scheduled Course* (interactive)
- *Mass Selecting Training Requests* (interactive)
- *Mass Confirming Attendance* (interactive)
- *Mass Creating Training History* (interactive)

Example

Below is an example of how you can use these functions.

You decide to introduce a new training course that all 1000 employees in your organization must take. Your training room can hold 20 employees; therefore, you must run 50 classes. You perform the following steps:

1. Create a new course master record for the course.
2. Create a scheduled course record for the first planned date.
3. Use the course copy facility to copy that scheduled course to the other planned dates.
4. Select the *Mass Training Requests - Create* function. From one screen you submit a batch job that creates the 1000 training request records for the new course.
5. The F10 function key on the second Update Course Enrollments screen brings up a display list of the training requests with their employee names and numbers. You multi-select 20 employees for the first course. The system generates the 20 course enrollment records. You repeat the process for the other 49 courses.

As an alternative, you can use the *Mass Enrollment* function to submit a batch job to mass enroll all 1000 employees into the 50 courses.

6 Print the course sign-in sheets to verify attendance.

7 After the course has been held, you access the *Update Course Attendance* function for the course date. The system displays the list of the 20 employee enrollments. Use the completed course sign-in sheet to specify those employees who did not attend. Then you press F15 to interactively create the 20 employee training history records and generate the supporting report. You repeat this for each course.

8 At the end of the training program you use the *Print Untrained Employee List* function to identify those employees still requiring the training.

Terminology and Concepts

Attendance

Attendance is the confirmation of an employee's presence in scheduled courses.

Batch Job

A batch job is submitted to a job queue where it must wait its turn to execute in line with jobs submitted by other users. The benefit, however, of a batch job is that the user who submits the job is free to begin working with another function. See Interactive Job.

Code Types

Code types are pre-defined three-character designators the system uses to categorize information.

Code Values

Code values are five-character values that you assign to the pre-defined code types.

*CORE

Infinium provides this code value for code type TGP (training group) for courses in the core training group. See Training Groups.

Course Administration

Course administration includes the activities related to the scheduling of courses and the registration of employees in them.

Course Catalog

The course catalog is the function that contains course related information, including a course description, location, instructors, providers and related exercises and tests.

Course Category

Course categories are defined under code type CCG. You use them to classify training courses.

Course Sessions

Course sessions are segments of a training course that address individual topics related to the course. For example, a management training program may consist of five sessions, each having a different topic. When they are combined, they constitute the training course. The terms course session and session are used interchangeably in this guide.

Employee History

The employee history record indicates that the employee received training in a specific course.

Enrollment

Enrollment is the scheduling of employees into training courses.

Entity Controls

You use *Update Entity Controls* to identify links between Infinium TR and Infinium HR and also between Infinium TR and Infinium GL.

External Course

An external course is taught by someone outside your company.

External Delegate

External delegates are training course attendees who are not listed in the employee database shared by Infinium TR and Infinium HR. External delegates are also referred to as external employees or non-employees. You can create a list of non-employees that are associated with an external employer.

External Employer

External employers are employers of external delegates or non-employees. You can define external employers under code type TER.

Explode

You can press F9 on a valid date in the classroom, instructor, and equipment availability functions to display availability details of instructors, classrooms and equipment for a specific calendar date.

Fee Types

The system handles two types of fees. Cost records for course attendees can be either for the full amount of the course fee or for a prorated amount of the total course fee.

Interactive Job

An interactive job executes immediately from your terminal. It is not submitted to a queue. The user who submits the job, however, cannot use his or her terminal until the job has completed. See Batch Job.

Internal Course

An internal course is one that is taught within your company.

Provider

A course provider is the company or organization that supplies the course to your company.

Scheduling

Scheduling is the process of assigning dates to existing courses.

Session

A session is a component part of a course. Courses can consist of any number of sessions. A session can cover a specific course topic or it can represent a time segment for a course. The terms course session and session are used interchangeably.

Stage

Certain types of courses can have aspects or stages that precede or continue beyond the classroom part of the course, such as time for the employee to try out new skills or time for follow up meetings. Courses can consist of any number of stages. By defining course stages as part of the course definition, you can update the completion dates of these stages for employees who attended that course.

Training Groups

There are two types of training groups, those that define the training courses associated with a specific job or position and those that define the core training courses everyone is required to take. You create training group code values for training group code type TGP. Infinium provides the *CORE code value for core training courses.

Training Group Interface

When you enter a new employee in Infinium HR using the *Enter New Hire* function and assign new employees to training groups, job-specific and *CORE training groups, the system then interfaces with the *Update Training Requests* function in Infinium TR to create training requests for these courses for the new employee.

Training Request

A training request includes training needs, requests and recommendations. These can be made by an employee, an employer, or be automatically generated by the system.

User-defined Fields

User-defined fields are fields where you assign the value that the system displays on the screen. The value you enter into the user-defined field is associated with a specific code type.

Notes

Chapter 2 Setting up Master Files

2

This chapter describes the tasks that you perform before you create courses and process employees in Infinium TR.

The chapter consists of the following topics:

Overview of Master Files

Infinium TR Master Files

The following master files and their descriptions are used when setting up Infinium TR:

- TRPCM - Code Types Master File
- TRPEB - Training System Control File
- TRPEL - Course Locations File
- TRPEU - Training System Course Provider File

User-defined fields are used in the following files:

- TRPEC - Training System Course Master File
- TRPEM - Training Nominations File
- TRPEP - Training System Scheduled Courses File
- TRPEX - Training System Course Enrollment/Attendance File
- TRPEY - Training System Course Costs File

You can find information about the Training System Instructor File (TRPEI) in the “Managing the Course Catalog” chapter.

To set up the Infinium TR system, you must use the following *Master Files* functions:

- *Update Codes*
- *Update Course Location*
- *Update Course Provider*
- *Update Entity Controls*
- *Update User Defined Fields*
- *Update Instructors*

Master Files Impact on Processing

Code Types

We ship Infinium TR with specific training code types; for example, Training Reason Code (type **TRS**) and Classroom Code (type **ROM**). You can create your own set of code values and their descriptions for each code type. For example, within the code type for classroom, you might create codes ROOM1, ROOM2, and so forth. The system uses the code values you assign to code types to categorize and validate information for accuracy in reporting. Infinium TR provides the code types and you assign values to them.

Course Locations

Course locations indicate where training courses are conducted.

Course Providers

Course providers identify organizations or individuals outside your company who provide courses to your employees.

Entity Controls

The system uses these controls in the interface between Infinium TR and the general ledger system you use.

User-Defined Fields

The system uses the descriptions you assign to the seven user-defined fields on applicable screens and reports. The actual user-defined fields are all coded fields, each with its own code type. You use these user-defined codes to record training information specific to your company. For example, if you have employees attending courses at other sites and they require hotel accommodations, you might use one of the user-defined fields on the course enrollment record for hotel details.

Instructors

Instructors indicate employees and non-employees who are qualified to teach courses in your organization.

Infinium TR Tasks

After you assign code values to code types and descriptions to user-defined fields, and after you define course locations, course providers and course instructors, you can do the following:

- Create courses
- Assign instructors to courses
- Assign courses to training groups
- Create sessions/stages for courses
- Create exercises/tests for courses and course sessions

Objectives

After completing this chapter, you should be familiar with how to establish Infinium TR controls and how to perform the following essential activities when you implement Infinium TR:

- Assign code values to code types
- Define course locations
- Define course providers
- Establish entity controls
- Assign definitions to user-defined fields
- Define instructors

Assigning Code Values to Code Types

Code Types

Code types are pre-defined three-character designators Infinium TR uses to categorize information. Infinium TR has a number of pre-defined code types, each representing a category of information. You can assign multiple code values to each code type.

Code Values

Code values are five-character values that you assign to the pre-defined code types. To optimize your Infinium TR system, you should establish a table of code values for each code type. The code values should represent information relevant to your company.

Available Code Types

Below are the code types, their descriptions, and the functions in which Infinium TR uses them. You create your own set of code values and their descriptions for each of these code types.

ASS (Course Assessment)

You use course assessment code values when you update courses, update course schedules, update or create course attendance, and update or create employee training history. Course assessment code values indicate the standard or effectiveness of courses; for example, you can create codes such as VGOOD, GOOD, FAIR, POOR, and so forth or you can use code letters such as A+, A, A-, B+, B, and so forth.

CAN (Cancellation Reason)

Use the cancellation reason code type to identify the reason for canceling a course or an enrollment in a course.

CCG (Course Category)

You use course category code values when you update, create or print courses, print employee training history, print employee history, and print course costs. Course category code values are classifications of classes. Examples of course category codes that you could use include Technical, Accounting, Management Skills, New Employee Orientation, Safety, and so forth.

CEA (Course Enrollment Actions)

You use course enrollment action code values when you update or create enrollments and mass enroll employees in courses. Examples of course enrollment action codes that you could use include Letter Required, Phone to Confirm, Check with Supervisor, and so forth.

CPT (Competency)

You use competency code values when you update or create exercise competencies from within the *Update Exercises/Tests* function. Typical examples of competency codes include Decision Making, Planning, Motivating, Customer Care, and so forth.

CTY (Course Type)

You use course type code values when you update, create or print courses, print employee history, and print course costs.

CUR (Currency)

You use currency code values when you update or create courses, update or create course costs, update or create employee costs, print course costs. Use these code values to identify the currency in which course fees and costs are charged.

DOC (Documentation)

You use documentation code values when you update or create courses, and update or create course schedules. Use this code to identify the documentation requirements of a course.

EQP (Equipment)

You use the equipment code values when you allocate equipment for a course. Since each piece of equipment is a unique resource, assign code values to each piece of equipment rather than assigning code values to each category of equipment.

GRA (Grade)

You use grade code values when you update or create employee training history and update or create course attendance. Use grade code values to indicate the employee's course mark or degree of accomplishment or identify the passing grade required for a course.

NRM (Norm)

You use norm code values when you update or create exercises and tests and competencies for these. Norm code values identify the normal or average score that is generally recorded by employees taking a test or performing an exercise.

PLN (Training Plan)

The Training Plan Code will be implemented in a future release. You assign training plan code values to this code type. You can associate training plan code values with a person's training history.

In the International version of Infinium TR, the information in the *Training plan* field in Infinium HR defaults into the training history record.

ROM (Classroom)

You use classroom code values when you work with classroom availability, print the classroom schedule, update or create enrollments, print enrollments, print course sign-in sheets, update or create course attendance, update, create or print course schedules, print employee training history, update or create course costs, update or create employee costs, and work with external delegate costs.

SES (Session)

You use session code values when you update, create or print sessions or stages. Session code values identify the various meetings or occurrences that make up a course.

SKL (Skill)

You use skill code values when you update or create employee training history, update or create courses, and update or create sessions or stages.

Skill code values identify the skill level that will be met upon completion of the course.

STS (Status)

You use status code values when you work with the calendar functions. Status code values identify classroom, instructor, and equipment availability.

STY (Study Type)

You use the study type code values when you update, create or print courses, print employee training history, and print course costs. Study type values identify type of study required to complete a course. Examples of study codes you can use include Classroom Based, Home Study, External, College, Day Release, Video, and so forth.

TAC (Training Actions)

You use training action code values when you update, create or print employee training requests, create enrollments from within training requests, perform mass refresher requests and mass training requests. Training action code values identify specific actions associated with a training request that you must take; for example, send a training letter to or call an employee.

TCS (Training Cost Type)

You use training cost type code values when you update or create courses, update or create employee costs, update, create or print course costs, and work with external delegate costs.

TC1 Course Master User Defined 1)

You use this course master user-defined code type value when you update or create courses.

TC2 (Course Master User Defined 2)

You use this course master user-defined code type value when you update or create courses.

TC3 (Course Schedule User Defined 1)

You use this course schedule user-defined code type value when you update or create course schedules.

TC4 (Course Schedule User Defined 2)

You use this course schedule user-defined code type value when you update or create course schedules.

TC5 (Requests User Defined)

You use this requests user-defined code type value when you update, create or print employee training requests, perform mass refresher requests, mass training requests, mass enrollments, and when you create enrollments from training requests.

TC6 (Enrollments User Defined)

You use this enrollments user-defined code type value when you update or create enrollments and perform mass enrollments.

TC7 (Training Costs User Defined)

You use this training costs user-defined code type value when you update, create or print course costs and update or create employee costs.

TER (External Employers)

You use external employer code values when you update or create enrollments, print course costs, and work with external delegate costs. These code values identify the person or company for whom course attendees, who are not members of your organization, work.

TGP (Training Group)

You use training group code values when you update training group courses, print training groups, update or create course security, perform mass enrollments, mass refresher requests, and mass training requests. Training group code values identify training groups that define the courses associated with a specific job or position.

In addition to your own training group codes, you should also create a training group code called *CORE. Use the *CORE code to identify all the core courses that every employee must take.

TPS (Training Cost Payment Status)

You use training cost payment status code values when you update, create or print course costs, update or create employee costs, and work with external delegate costs. These code values identify the status of the expense record.

TRS (Training Reason)

You use training reason code values when you update, create or print employee training requests, create enrollments from training requests, perform mass refresher requests and mass training requests. These code values explain why the training is needed.

You must create the code value *NEW for code type TRS, Training Reason Code. The system uses this code value when it automatically creates an employee training request.

TSK (Task)

You use task code values when you update or create courses, update or create employee training history, and update or create sessions or stages. Task code values are associated with skills and they identify the work or function performed with that skill.

VAL (Value)

You use value code values when you update or create courses. These code values identify the value of the training; for example, value for money, value to the company, or personal growth value.

Use of Code Values and Code Types

The system uses code values throughout Infinium TR system. You can use the F4 prompt feature to display a list of valid code values when you are positioned on a code value field. You can identify prompt fields by the + (plus) sign that follows the field.

The Infinium TR system uses code types in the same way as other Infinium products. You should understand, in general, how code types and code values work with an Infinium application. It is also important that you become familiar with the organization of code values in Infinium HR.

For example, the system uses one of the code values you set up for Course Type (CTY) to identify those courses that are job related. When you promote an employee, the system automatically deletes training request records that are applicable to the employee's prior position and generates training requests that are appropriate for the new position.

In Infinium TR code values are not associated with the employer or the employer group as they are in Infinium HR.

Assigning Code Values

Complete the following steps to set up code values:

1 From the Infinium TR main menu select *Master Files*.

2 Select *Codes*.

3 Select *Update Codes* [UCODES]. The system displays a screen similar to the screen shown in Figure 2-1.

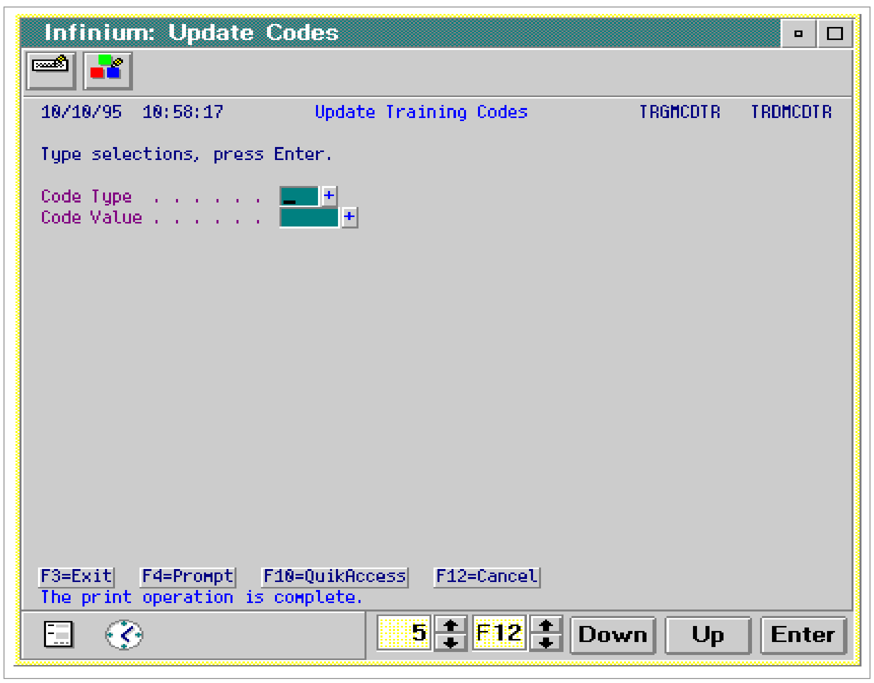


Figure 2-1: Update Training Codes screen 1

Use this screen to enter new code values for a code type. You can also modify this information for an existing code value.

4 Type the identifier for the code type and for the code value. Or, for both *Code Type* and *Code Value* press F4 and select from the displayed list.

5 Press Enter. The system displays a screen similar to the screen shown in Figure 2-2.

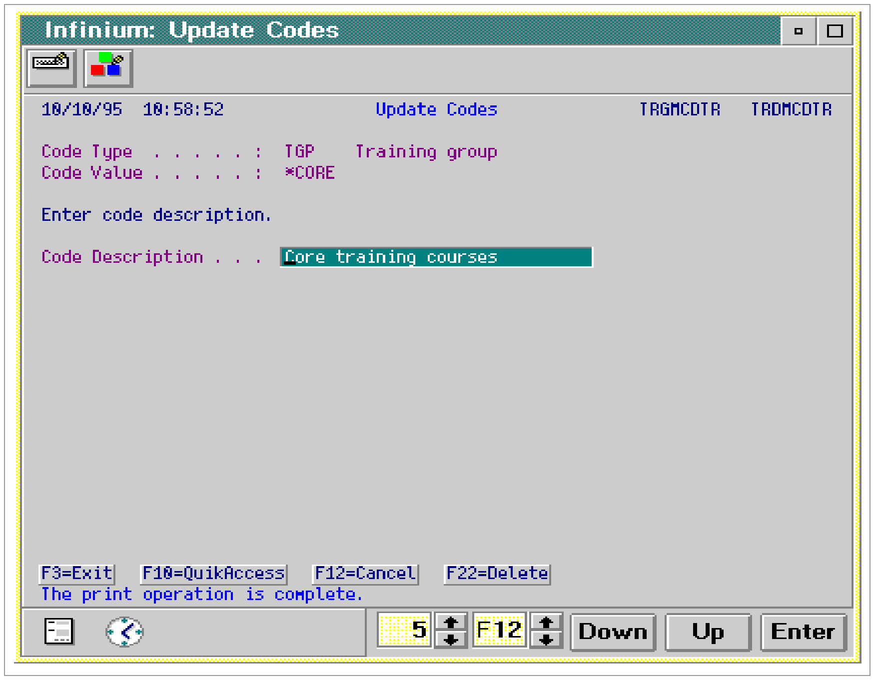


Figure 2-2: Update Training Codes screen 2

Use this screen to provide a description of the code value or to modify this information for an existing code value.

6 Type up to 30 characters that describe the code value.

7 Press F3 to exit and save.

Defining Course Locations

Overview

Course locations are the sites where courses are conducted. They may be located at your own training facilities or an external site. They may also be something other than an actual location. For example, you may want to create a course location called TBD (to be determined), one called CC (correspondence course), or one call AV (audio/visual).

The system uses the identifier you enter in the *Location ID* field throughout Infinium TR. You must specify a course location when you create a course. When you schedule a course, you can override its location. You can use F4 to prompt and display a list of valid location identifiers whenever the cursor is on the *Location ID* field.

Defining a Course Location

Complete the following steps to create a course location:

1. From the Infinium TR main menu select *Master Files*.

2. Select *Course Locations*.

3. Select *Update Course Locations* [UL]. The system displays a screen similar to the screen shown in Figure 2-3 listing all locations for which information has been established.

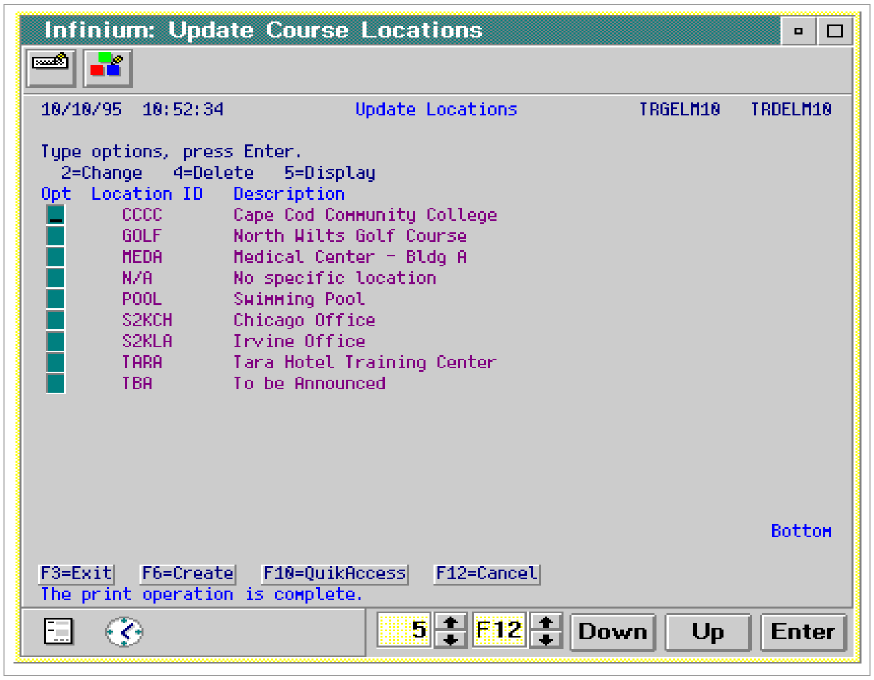


Figure 2-3: Update Locations screen

This screen lists all course locations for which information has been entered. Use this screen to do the following:

- Create a new course location by pressing F6
- Update a course location record by selecting that record with **2**
- Delete a course location record by selecting that record with **4**
- Display a course location record by selecting that record with **5**

If you type **4** to delete a course location record, and if the record is currently assigned to a course, Infinium TR informs you that this course location cannot be deleted because certain dependencies may exist. The system displays a message window, similar to the window shown in Figure 2-4.

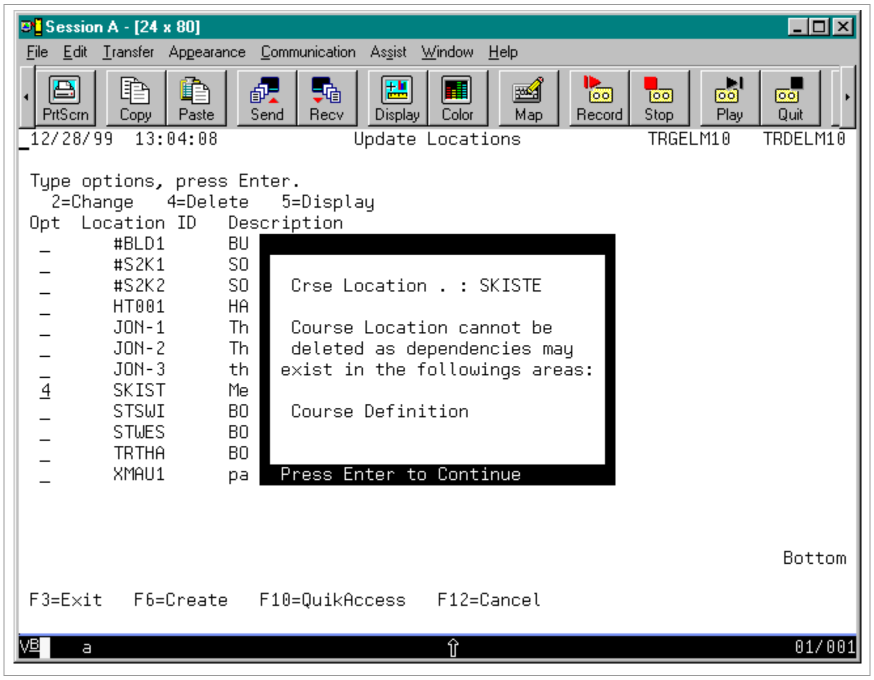


Figure 2-4: Update Locations screen – location cannot be deleted

You can press Enter to continue working with course location records.

4 Press F6 to create a new course location record. The system displays a screen similar to the screen shown in Figure 2-5.

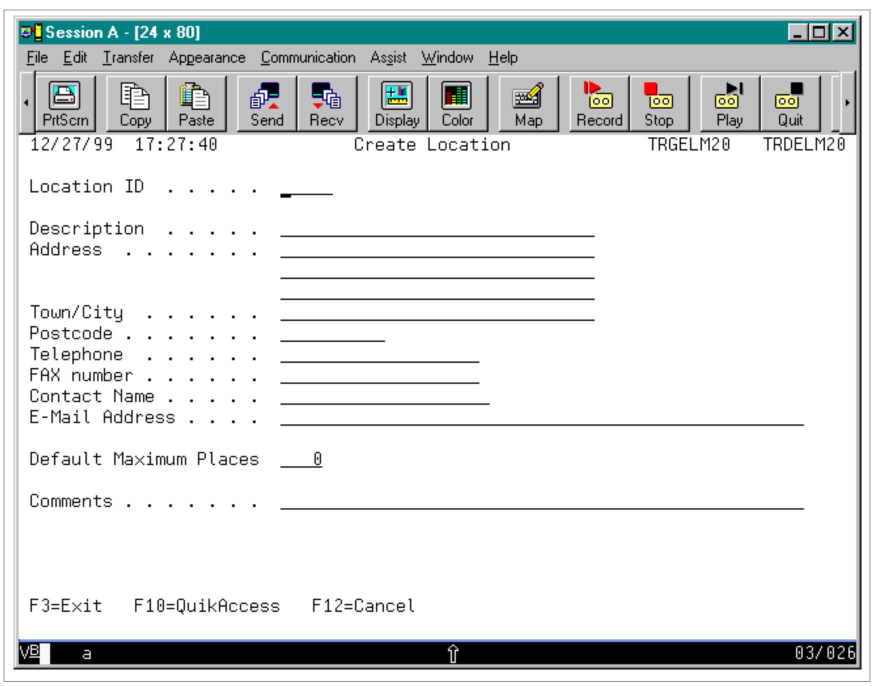


Figure 2-5: Create Location screen

Use this screen to create a new course location record. You are required to enter information in the *Location ID, Description, Address* (line 1) and *Town/City* fields.

5. Type the appropriate information for the new location.

6. Press F3 to exit and save.

Defining Course Providers

Overview

Organizations or individuals who provide courses to your company's employees are course providers. Individuals who teach the courses are the instructors.

The system uses the identifier you enter in the *Course Provider ID* field throughout Infinium TR. When you create a course, you can specify that an organization or individual external to your company provides the course. You can use F4 to prompt and display a list of valid location identifiers whenever the cursor is on the *Course Provider ID* field.

Defining Course Providers

Complete the following steps to define a course provider:

1. From the Infinium TR main menu select *Master Files*.
2. Select *Course Providers*.
3. Select *Update Course Provider* [UCP]. The system displays a screen similar to the screen shown in Figure 2-6 listing all providers for whom information has been established.

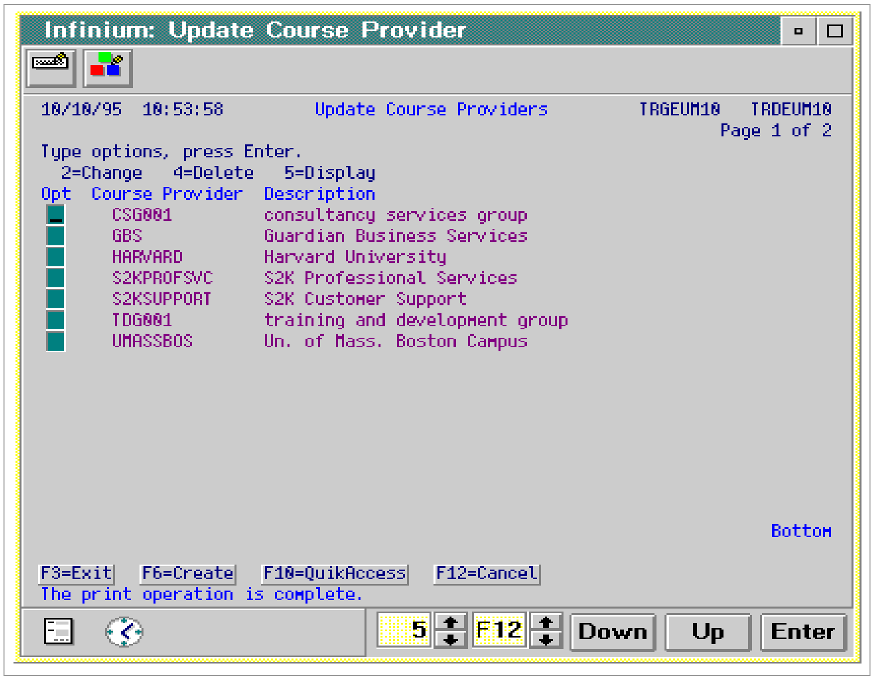


Figure 2-6: Update Course Providers screen

This screen lists all course providers for whom information has been entered.

Use this screen to do the following:

- Create a new course provider by pressing F6
- Update a course provider record by selecting that record with **2**
- Delete a course provider record by selecting that record with **4**
- Display a course provider record by selecting that record with **5**

If you type **4** to delete a course provider record, and if the record is currently assigned to a course, Infinium TR informs you that this course provider cannot be deleted because certain dependencies may exist. The system displays a message window, similar to the window shown in Figure 2-7.

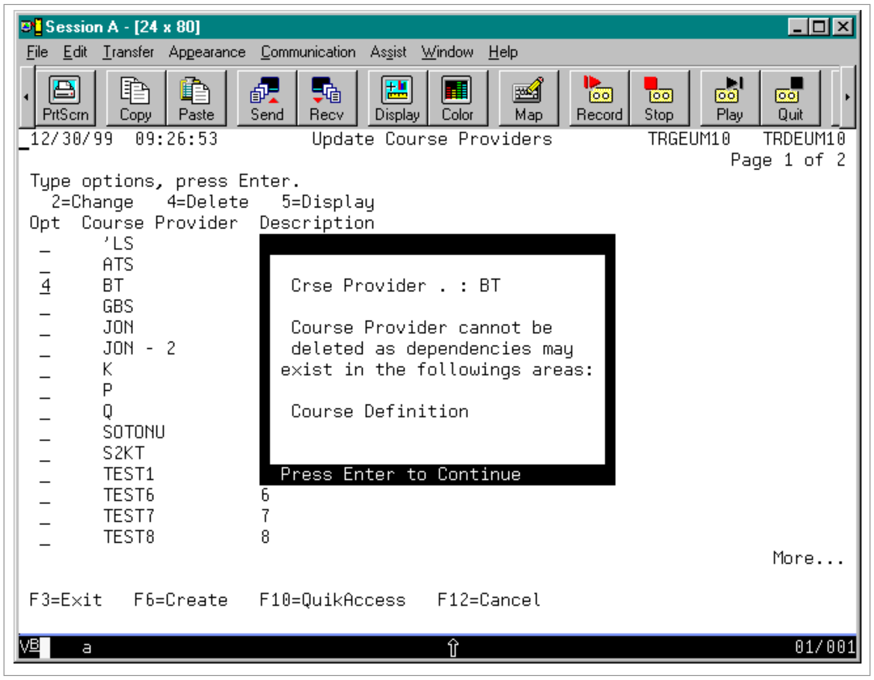


Figure 2-7: Update Course Providers screen – provider cannot be deleted

You can press Enter to continue working with course provider records.

4 Press F6 to create a new course provider record. The system displays a screen similar to the screen shown in Figure 2-8.

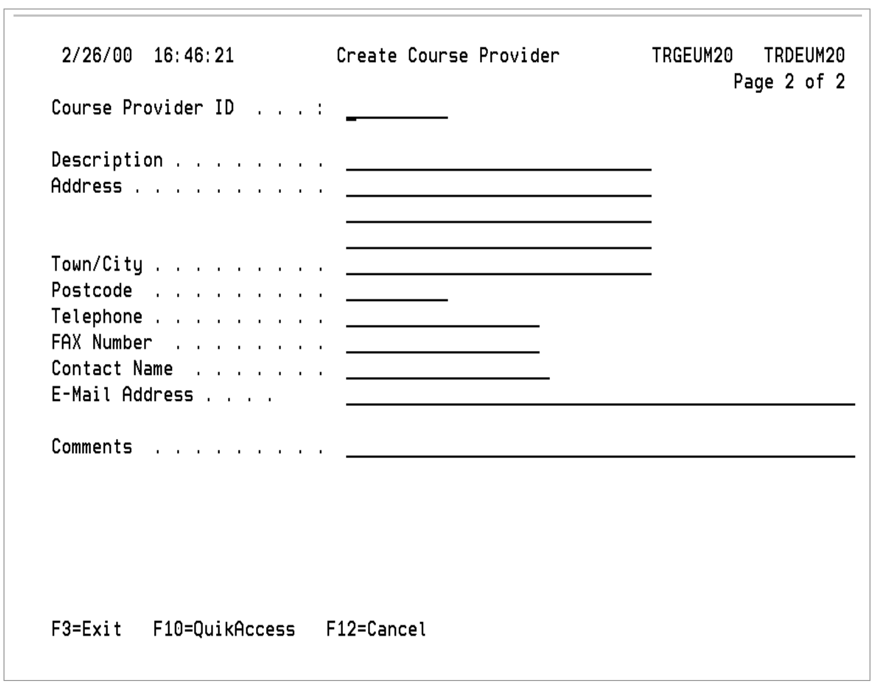


Figure 2-8: Create Course Provider screen

Use this screen to create a course provider record. You are required to enter information in the *Course Provider ID, Description, Address* (first address line) and *Town/City* fields.

5 Type the appropriate information for the new course provider.

6 Press F3 to exit and save.

Establishing Entity Controls

Overview

You can define two optional entity controls:

- If you need to use the prompt capability to select valid general ledger account numbers for assignment to training costs, you need to set an entity control that defines the interface between Infinium TR and Infinium GL.
- If you want to validate the non-employee names that you enter in course enrollments, you need to set an entity control that specifies this validation.

Infinium TR can interface with a general ledger system. This interface capability means that you can assign your training cost information to valid general ledger accounts. If you are using Infinium GL, you do not need to change the value, GLGAPI, which defaults into the *GL Interface Program* field, since that is the Infinium general chart of accounts validation program.

If you use a general ledger system other than Infinium GL, change the value to the validation program name you use at you site. You also have the option of not validating general ledger account numbers.

Establishing Entity Controls

Complete the following steps to define entity controls in Infinium TR:

1. From the Infinium TR main menu select *Master Files*.
2. Select *Entity Controls*.
3. Select *Update Entity Controls* [UENTITY]. The system displays a screen similar to the screen shown in Figure 2-9.

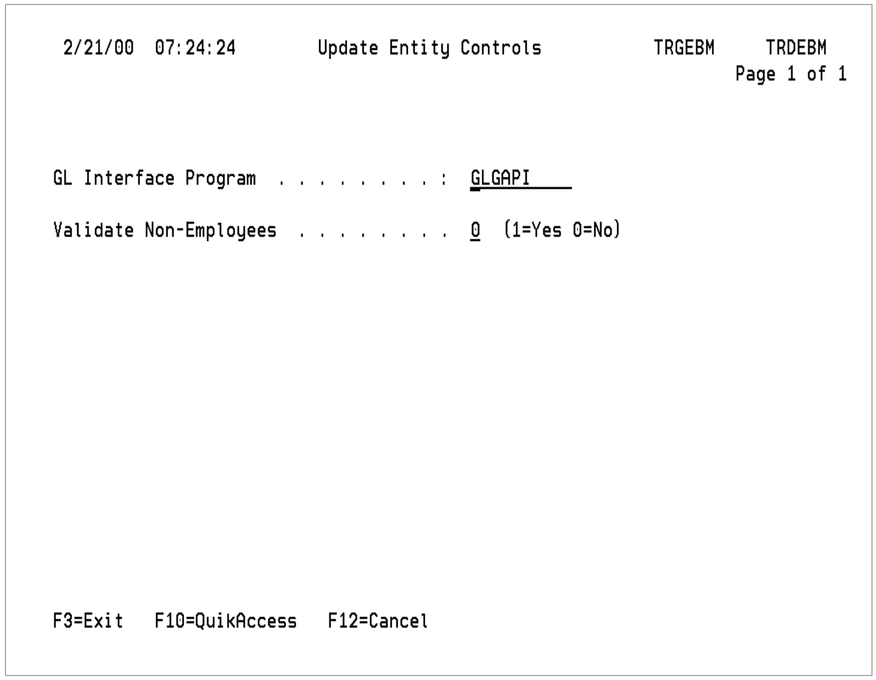


Figure 2-9: Update Entity Controls screen

4 Use the following information to complete the fields on this screen.

GL Interface Program

Type the general ledger interface program the Infinium TR system will use or leave this field blank if you do not require validation.

Validate Non-Employees

Type **1** if you want the system to validate the names of non-employees that you enroll in scheduled courses when you use a valid external employer code in the *Employee Enrollments* function. Type **0** if you do not require this validation.

Non-employees are also referred to as external delegates or external employees and are not listed in the Infinium HR employee database. You can enter and update basic information for non-employees when you use the *Update Non-Employees* function.

For more information, you can refer to the “Creating Non-employee Records” topic.

5 Press F3 to exit and save.

Assigning Values to User-Defined Fields

Overview

Infinium TR allows you to define descriptions for up to seven user fields. These fields are coded fields with their own code types. You use *Update Codes* to create sets of applicable user field code values for each user field code type (TC1 through TC7 as described below). The system uses the text descriptions you enter for these user fields as the field names that the system displays on screens and prints on all applicable reports.

For example, you may decide to use the user field on the course enrollments record to record the hotel at which attendees will stay. To do this, type **Hotel** as the text description for this user field and create codes for all your local hotel names under the code type TC6.

Below is a list of the seven user-defined fields, their code types, and where they are used in Infinium TR.

Course Master (1)

This user-defined field, which is associated with code type TC1, appears on the Create Course and Update Course screens.

Course Master (2)

This user-defined field, which is associated with code type TC2, appears on the Create Course and Update Course screens.

Course Schedule (1)

This user-defined field, which is associated with code type TC3, appears on the Create Scheduled Course and Update Scheduled Course screens.

Course Schedule (2)

This user-defined field, which is associated with code type TC4, appears on the Create Scheduled Course and Update Scheduled Course screens.

Training Requests (1)

This user-defined field, which is associated with code type TC5, appears on the following screens: Create Employee Training Request, Update Employee Training Request, Print Training Requests, Mass Refresher Requests - Trial, Mass Refresher Requests - Create, Mass Training Requests - Trial, and Mass Training Requests - Create.

Enrollments (1)

This user-defined field, which is associated with code type TC6, appears on the following screens: Create Course Enrollments, Update Course Enrollments, Mass Enrollments Trial, and Mass Enrollment.

Costs (1)

This user-defined field, which is associated with code type TC7, appears on the following screens: Create Employee Costs, Update Training Costs, Create Course Costs, Update Course Costs, Print Costs, and External Delegate Costs.

Assigning Descriptions to User-Defined Fields

Complete the following steps to assign descriptions to user-defined fields:

1. From the Infinium TR main menu select *Master Files.*
2. Select *User Defined Fields*.
3. Select *Update User Defined Fields* [UUDF]. The system displays a screen similar to the screen shown in Figure 2-10.

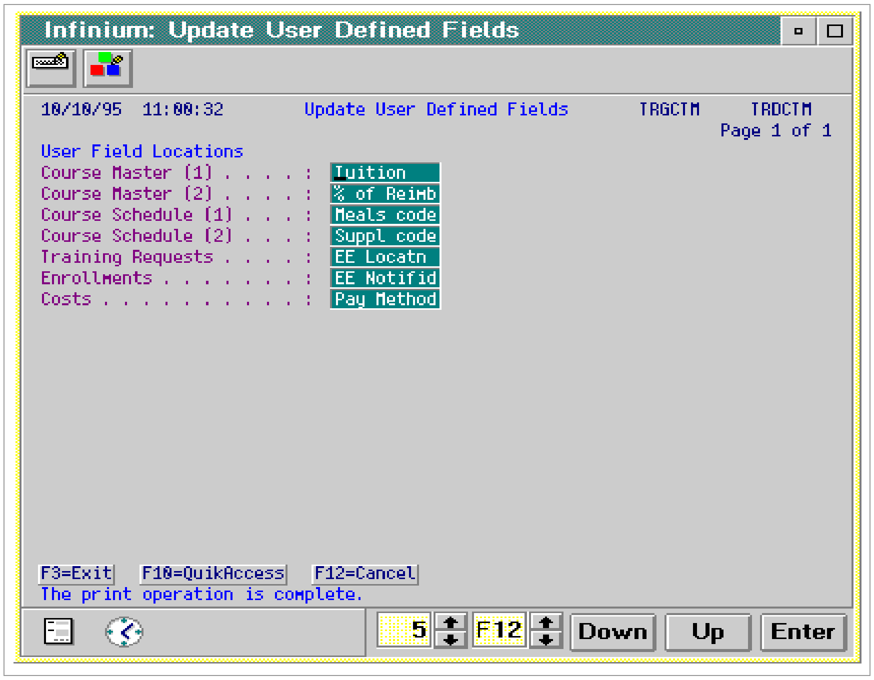


Figure 2-10: Update User Defined Fields screen

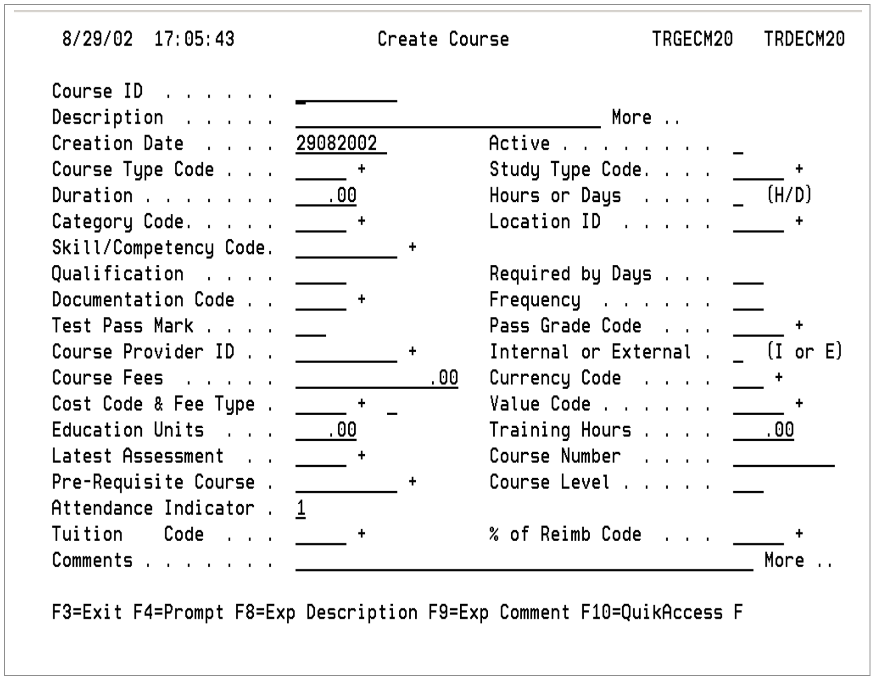
Use this screen to define the seven optional fields provided.

4 Type the appropriate word or phrase for each field you want to describe.

5 Press F3 to exit and save.

Example of a User-Defined Field

The Create Course screen in Figure 2-11 shows the user-defined field *Tuition*. The code value you enter into this field is associated with code type TC1.



```
 8/29/02  17:05:43              Create Course            TRGECM20   TRDECM20

Course ID  . . . . . .  __________
Description  . . . . .  ______________________________ More ..
Creation Date  . . . .  29082002_          Active . . . . . . . . .  _
Course Type Code . . .  _____ +            Study Type Code. . . .  _____ +
Duration . . . . . . .  ___.00             Hours or Days  . . . .  _  (H/D)
Category Code. . . . .  _____ +            Location ID  . . . . .  _____ +
Skill/Competency Code.  __________ +
Qualification  . . . .  _____              Required by Days . . .  ___
Documentation Code . .  _____ +            Frequency  . . . . . .  ___
Test Pass Mark . . . .  ___                Pass Grade Code  . . .  _____ +
Course Provider ID . .  __________ +       Internal or External .  _  (I or E)
Course Fees  . . . . .  _____________.00   Currency Code  . . . .  ___ +
Cost Code & Fee Type .  _____ +  _         Value Code . . . . . .  _____ +
Education Units  . . .  ___.00             Training Hours . . . .  ___.00
Latest Assessment  . .  _____ +            Course Number  . . . .  __________
Pre-Requisite Course .  __________ +       Course Level . . . . .  ___
Attendance Indicator .  1
Tuition    Code  . . .  _____ +            % of Reimb Code  . . .  _____ +
Comments . . . . . . .  _____________________________________________ More ..

F3=Exit F4=Prompt F8=Exp Description F9=Exp Comment F10=QuikAccess F
```

Figure 2-11: Create Course screen

Creating Instructor Records

Overview

Instructors are the people who teach the courses offered by your company. The system supports internal instructors who are employees of your organization, and it also supports external instructors who are outside training specialists.

The system uses the five-character identifier you enter in the *Instructor ID* field throughout Infinium TR. You can use F4 to prompt and display a list of valid instructor identifiers whenever the cursor is on the *Instructor ID* field.

Creating Instructor Records

Complete the following steps to enter instructor information for the course catalog:

1. From the Infinium TR main menu select *Instructors.*
2. Select *Update Instructors* [UI]. The system displays a screen similar to the screen shown in Figure 2-12.

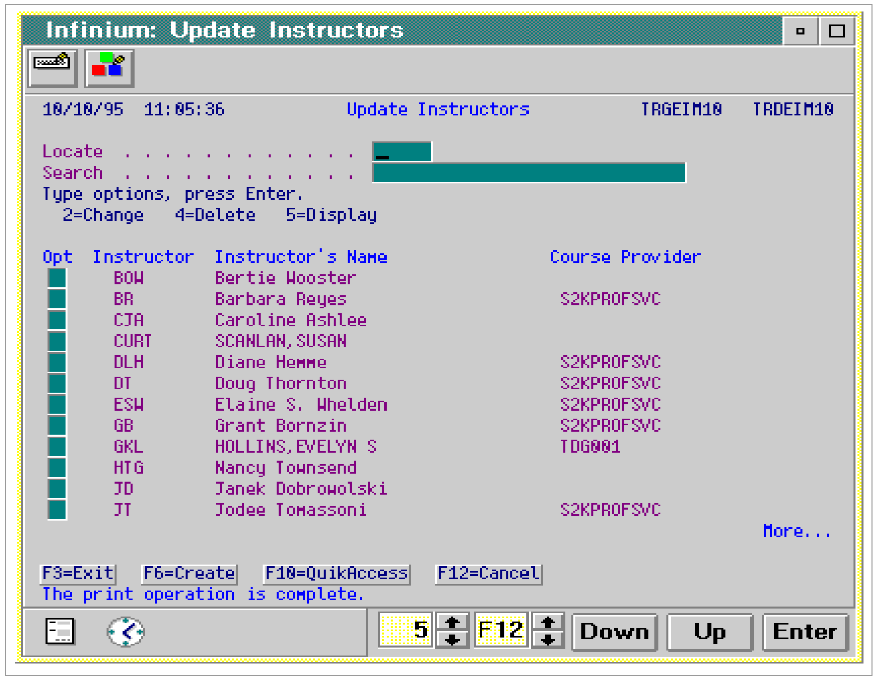


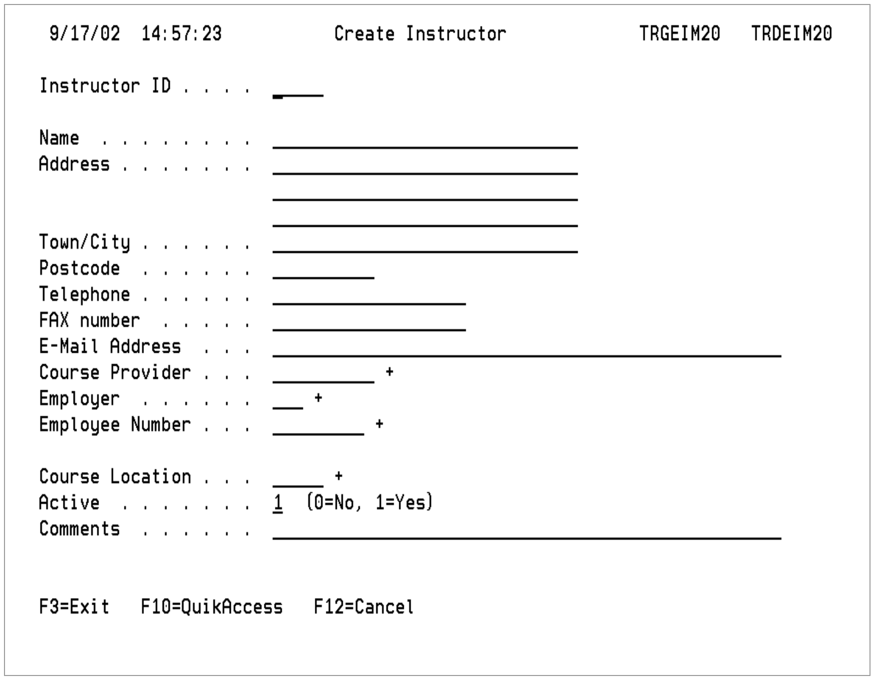
Figure 2-12: Update Instructors screen

This screen lists all instructors for whom information has been entered. Use this screen to do the following:

- Create a new instructor record by pressing F6
- Update an instructor record by selecting that record with **2**
- Delete an instructor record by selecting that record with **4**
- Display an instructor record by selecting that record with **5**

The *Locate* and *Search* fields enable you to find an instructor without having to scroll through the list of instructors. The search feature is especially useful if you do not know the instructor’s identifier. The system will search through all instructors and display those that contain the search text you enter. To perform the search, type in the search text and press Enter.

3 Press F6 to create information about a new instructor. The system displays a screen similar to the screen shown in Figure 2-13.



```
9/17/02  14:57:23          Create Instructor          TRGEIM20   TRDEIM20

Instructor ID . . . .  _____

Name  . . . . . . . .  ______________________________
Address . . . . . . .  ______________________________
                       ______________________________
                       ______________________________
Town/City . . . . . .  ______________________________
Postcode  . . . . . .  __________
Telephone . . . . . .  ___________________
FAX number  . . . . .  ___________________
E-Mail Address  . . .  __________________________________________________
Course Provider . . .  __________ +
Employer  . . . . . .  ___ +
Employee Number . . .  _________ +

Course Location . . .  _____ +
Active  . . . . . . .  1  (0=No, 1=Yes)
Comments  . . . . . .  __________________________________________________


F3=Exit   F10=QuikAccess   F12=Cancel
```

Figure 2-13: Create Instructor screen

Use this screen to enter instructor information and create a new instructor record. The following fields are required: *Instructor ID, Name, Address* (line 1), and *Town/City*.

4 Complete this screen using the following field information:

Employer or the Employee Number

If the instructor is also an employee, you can enter his or her employer and employee number as cross reference information. If you enter a value in one of these fields, you are required to enter a value in the other field.

If the instructor is an employee, you can eliminate the need to enter his or her name and address information by simply entering his or her employer and employee number and pressing Enter. The system copies that employee’s name and address information from the Employee Master files into the instructor name, address, and telephone number fields.

5 Press F3 to exit and save.

Creating Non-employee Records

Overview

Non-employees are training course attendees that you associate with an external employer and that are not listed in the Infinium HR employee database shared with Infinium TR. You can create non-employee records only in Infinium TR. Non-employees are also referred to as external delegates or external employees.

You can enter non-employees as well as employees in the course enrollment process. Course enrollments are records you create to identify employees and/or non-employees who are due to attend specified scheduled courses. For more information, you can refer to the “Creating Course Enrollments” chapter.

Infinium TR provides an option in entity controls to validate the non-employee names that you enter in course enrollments. For more information, you can refer to the “Establishing Entity Controls” topic.

Defining Non-Employees

Complete the following steps to define a non-employee:

1. From the Infinium TR main menu select *Master Files.*

2. Select *Non-Employees.*

3. Select *Update Non-Employees* [NONEMPLOYE]. The system displays a screen similar to the screen in Figure 2-14.

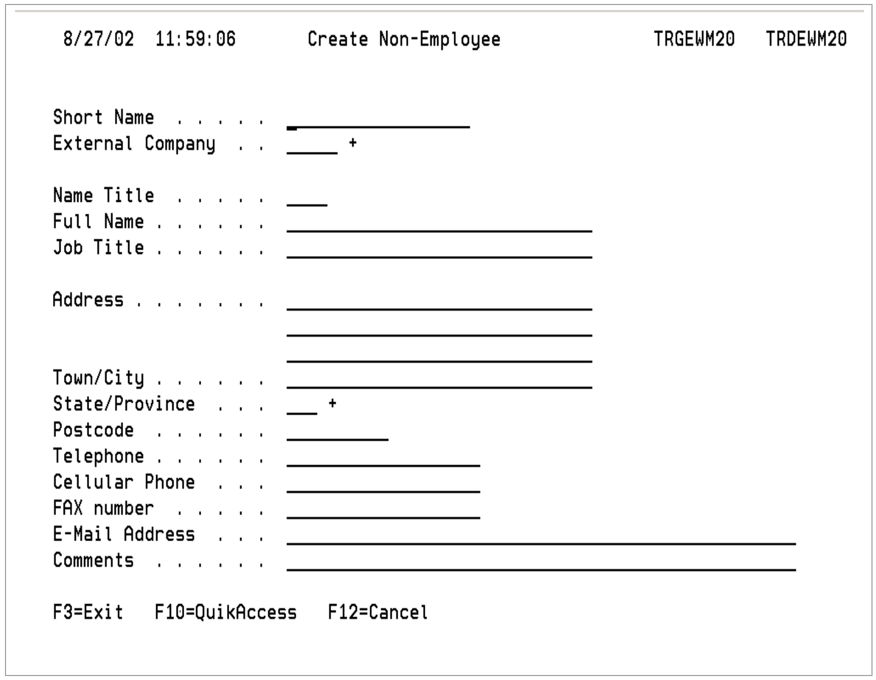
```
 2/26/00  17:14:49     Update Non-Employees             TRGEWM10   TRDEWM10


Search  . . . . . . . . . . . .  _______________
Type options, press Enter.
  2=Change   4=Delete   5=Display

Opt  Name of Person     External Company
 _   Adams, Tony          C&W     Chelsea & Westminster
 _   Brown, John          C&W     Chelsea & Westminster
 _   Douglas, Andrew      VALTC   Valley Tech
 _   Lynch, Sharon        VALTC   Valley Tech
 _   Morris, Paul         COM     Community Health
 _   Peter Jones          C&W     Chelsea & Westminster
 _   Petersen James       VALTC   Valley Tech
 _   Scott, Kevin         VALTC   Valley Tech
 _   Simpson, Ian         COM     Community Health
 _   Williams JH          C&W     Chelsea & Westminster
 _   Williamson Chris     COM     Community Health

                                                                  Bottom


F3=Exit   F6=Create   F10=QuikAccess   F12=Cancel
```

Figure 2-14: Update Non-Employees screen

This screen lists all non-employees for whom information has been entered. Use this screen to do the following:

- Create a new non-employee by pressing F6
- Update a non-employee record by selecting that record with **2**
- Delete a non-employee record by selecting that record with **4**
- Display a non-employee record by selecting that record with **5**

4 Press F6 to create a new non-employee record. The system displays a screen similar to the screen in Figure 2-15.



```
8/27/02  11:59:06       Create Non-Employee              TRGEWM20   TRDEWM20

Short Name  . . . . .
External Company  . .        +

Name Title  . . . . .
Full Name . . . . . .
Job Title . . . . . .

Address . . . . . . .



Town/City . . . . . .
State/Province  . . .      +
Postcode  . . . . . .
Telephone . . . . . .
Cellular Phone  . . .
FAX number  . . . . .
E-Mail Address  . . .
Comments  . . . . . .

F3=Exit   F10=QuikAccess   F12=Cancel
```

Figure 2-15: Create Non-Employee screen

Use this screen to create a non-employee record. You must enter information in the *Short Name*, *External Company*, *Full Name*, *Address* (first address line) and *Town/City* fields.

5 Type the appropriate information for the new non-employee.

6 Press F3 to exit and save.

Chapter 3 Managing the Course Catalog

3

This chapter describes the tasks that you perform when building and managing your course catalog.

The chapter consists of the following topics:

Overview of the Course Catalog

You use the *Update Courses* function to manage the basic control information about the courses at your company. This information includes a description of the course, its sessions and objectives, any exercises or tests, where the course meets, who teaches it, and any prerequisites for the course.

To build the course catalog, you must complete the tasks below in the order listed. You can operate the system without performing the optional tasks. However, you should complete all the tasks to optimize the system's functionality.

- Creating courses
- Assigning instructors to courses
- Assigning courses to training course groups (optional)
- Creating course sessions and stages (optional)
- Creating exercises and tests (optional)

Periodically, you will need to update course catalog information; for example, at the end of a semester or calendar year. You will also need to update course catalog information if, for example, your company introduces a new training program. You use the same functions to update catalog information as you use to create it.

After you create courses, you can schedule them, assign them to classrooms, assign instructors to teach them, and assign the necessary equipment for them. For more information, refer to the “Scheduling Courses” chapter.

In addition, you should assign training groups to positions and assign employees to training groups in Infinium HR to create the links between Infinium HR and Infinium TR. For more information, refer to the “Linking Infinium TR and Infinium HR” chapter.

Objectives

After completing this chapter you should be familiar with how to create and organize your company’s course catalog. You should be familiar with courses, sessions/stages, and exercises/tests.

Creating Courses

Overview

You use the *Update Courses* function to establish both internal and external courses that are available to your organization's employees. An internal course is one run by your company. An external course is one run by another organization.

In Infinium TR, a course does not have to be only formal, classroom-based training. A course can be any activity in which the employee learns something. For example, a course could be a lab or a machine procedure, a video, or a demonstration on how to use a piece of equipment.

The identifier you enter in the *Course ID* field is used throughout Infinium TR. This is a ten-character field that you can make very descriptive; for example, VOICEMAIL1. You can use F4 to prompt and display a list of valid course identifiers whenever the cursor is on the *Course ID* field.

Course location identifiers must exist. Course provider identifiers are optional, but you may require them at your site.

Code values for the following code types must exist:

- **CCG** Course Category
- **CTY** Course Type
- **STY** Study Type

The following code types are optional for these tasks, but you may require them at you site:

- **ASS** Course Assessment
- **CUR** Currency
- **DOC** Documentation
- **GRA** Grade
- **TC1** Course Master User-Defined Field 1
- **TC2** Course Master User-Defined Field 2
- **TCS** Training Cost

- **VAL** Value

Creating Courses in Infinium TR

Complete the following steps to create course information:

1. From the Infinium TR main menu select *Course Catalog*.
2. Select *Courses*.
3. Select *Update Courses* [UC]. The system displays a screen similar to the screen shown in Figure 3-1.

```
 8/27/02  16:24:05            Update Courses            TRGECM10   TRDECM10

Locate  . . . . . .  _________
Search  . . . . . .  ______________________________   Include inactive? . 0

Type options, press Enter. (Highlight denotes active)
  2=Change  3=Copy  4=Delete  5=Display  7=Exercises/Tests  8=Sessions/Stages
Opt  Course ID   Description                   Category  Location ID  Duration
 _   ABCDEFJHIJ  100-Basic Accounting Practices  ACCOU      JON-1        5.00 D
 _   ACCOUNT     100-Basic Accounting Practices  ACCOU      JON-1        5.00 D
 _   ACCOUNT2    accounting 2-100 prerequisite   ACCOU      #BLD1        5.00 D
 _   ART         Learning how to paint pictures  SUPER      WHQ          3.00 D
 _   ARTS        Arts and Crafts                 TEST       #BLD1
 _   ART1        Learning how to paint pictures  SUPER      WHQ          3.00 D
 _   ART2        Learn to paint good pictures    ACCOU      HT001
 _   COMPSKILLS  computer skills                 COMP       WHQ          5.00 D
 _   COPY        100-Basic Accounting Practices  ACCOU      JON-1        5.00 D
 _   DHTML       Dynamic HTML                    NLANG      WHQ
 _   DRIVING     Pass Your Driving Test          WAREH      JON-1        9.00 H
 _   ENB 934     hiv/aids nurses                 ACCOU      #BLD1      110.00 H
 _   ENB998      T&A for Nurse                   COMP       SKIST       15.00 D
                                                                       More...
F3=Exit   F5=Refresh   F6=Create   F10=QuikAccess   F12=Cancel
```

Figure 3-1: Update Courses screen

This screen lists all active courses for which information has been entered. You use this screen to do the following:

- Create a new course by pressing F6
- Update a course by selecting the course with **2**
- Copy a course by selecting the course with **3**
- Delete a course by selecting the course with **4**
- Display a course by selecting the course with **5**
- Update the exercises or tests for a course by selecting the course with **7**

- Update sessions or stages for a course by selecting the course with **8**
- Display both active or inactive courses by typing **1** in the *Include Inactive?* field

The *Locate* and *Search* fields enable you to find a course without scrolling through the list of courses.

4 Press F6 to enter information for a new course. The system displays a screen similar to the screen shown in Figure 3-2.

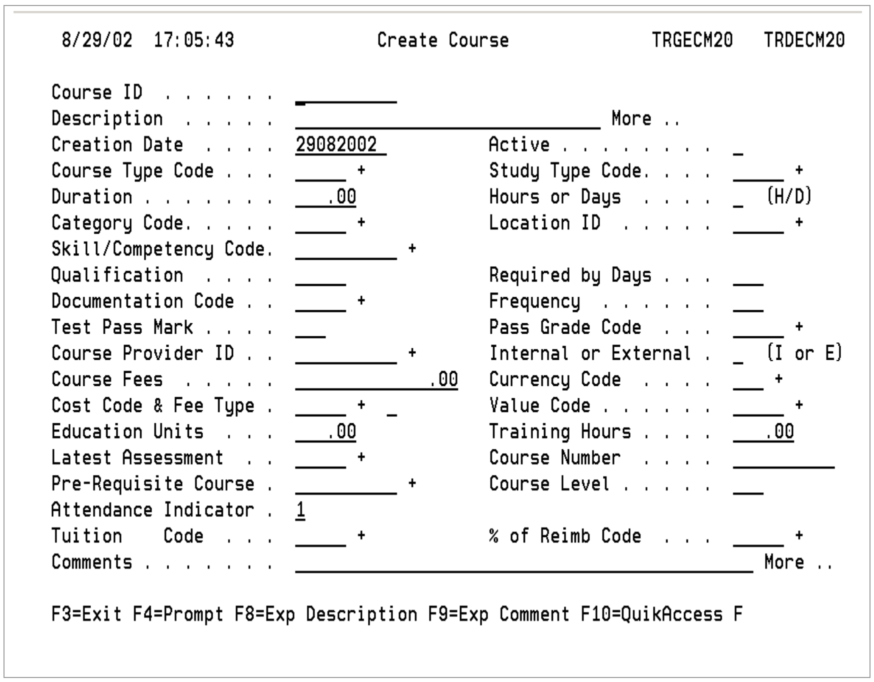


Figure 3-2: Create Course screen

Use this screen to enter the appropriate course information and create a new course record. The following fields are required: *Course ID, Description, Creation Date, Active, Course Type Code, Study Type Code, Category Code, Location ID, Internal or External*.

5 Use the following information to complete the fields on this screen.

Description

Type the course description.

Creation Date

The system date is the default date in this field. You can overwrite this date with another date. This is the date when you created this course.

Active

Use this field to indicate whether this course is currently available. Valid values are:

1	Yes, this course is active
0	No, this course is not active

Course Type Code

Specify or update an identifier for the course type.

Courses can be job-specific, may be required for new employees, or may be external education.

The code values for course types are associated with code type CTY, Course Type.

Study Type Code

This field identifies the type of study that is required to complete this course. For example, the course may be computer-based, it may require attendance in a classroom or simply home study, and so forth.

Duration

This is a 5-character field. Use this field to indicate the time period that this course will span; for example, 5 days or 5 hours. You specify whether the duration is measured in days or hours in the next field, *Hours or days*.

Hours or Days

Use this field to specify whether this course's duration is measured in days or hours. Valid values are:

H	Hours
D	Days

Category Code

You must specify the category in which this course belongs. For example, the course may be one of several communications courses, or it may be related to computer skills or customer relations.

Location ID

Enter the identifier for the course location in the *Location ID* field as defined when you entered location information in the *Update Course Location* function. The information you enter in the *Location ID* field defaults into the *Course Location* field when you use the *Update Course Schedule* function to create or edit schedule information. You can overwrite this information if necessary.

Skill/Competency Code

The code you enter in the *Skill/Competency Code* field identifies the area of proficiency, such as basic computer skills or advanced interviewing techniques, that the employee should attain on completion of the course.

When you prompt on this field with F4, Infinium TR displays a list of the skill/competency codes from the Infinium HR database. The system uses the skill/competency code with the skill/competency level to integrate results of employee training in Infinium TR with the employee skills and competencies function in Infinium HR.

For additional information, you can refer to the “Working with Course Attendance Records” chapter.

Skill/Competency Level

The identifier you enter in the *Skill/Competency Level* field designates the degree of proficiency usually acquired by employees taking the course, where **1** is the lowest and **9** is the highest level.

The system uses the skill/competency level with the skill/competency code to integrate results of employee training in Infinium TR with the employee skills and competencies function in Infinium HR.

If you do not want the Infinium TR course attendance process to update or create employee skill/competency data in Infinium HR, you must leave this field blank.

For additional information, you can refer to the “Working with Course Attendance Records” chapter.

Qualification

This is a free form field. You can use this field to specify that this course qualifies the participant for another course.

Required by Days

The number you enter in the *Required By Days* field indicates that this is a required course and employees should attend the course within the specified number of days after the date of hire.

When you hire a new employee and automatically create training requests, the system automatically calculates the *Required by Date* for required courses.

When you use the *Update Training Requests* function, the system automatically calculates the date when the appropriate employees should take the course based on the number you enter in the *Required By Days* field.

Documentation Code

Use this field to type the code value that identifies the type of documentation required for this course.

Frequency

Enter information in the *Frequency* field only if your company requires refresher training for this course. The number of months you enter indicates the number of months after the course completion that the employee should take the course again. For example, if you type **3** in the *Frequency* field, employees should take the course refresher three months following the completion of this course.

Test Pass Mark

Use this field to type the value that represents the passing mark for this course. When you update test results, the value you enter into this field will default into the employee record. The system does not allow you to enter a value in the employee record that is higher than the value entered here.

Pass Grade Code

Type the value that represents the passing grade for this course. The value in this field is only for information purposes.

Course Provider ID

Type the value that identifies the person or agency who provides this course.

Internal or External

Use this field to specify whether the provider is an internal or external resource. Valid values are:

I	Internal
E	External

Course Fees

Type the fees required for this course. The value you enter here is associated with the *Fee Type* field.

Currency Code

Use this field to identify the currency type that will be accepted for payment for this course. Type the code value that identifies the appropriate currency.

Cost Code

Use this field to describe the amount in the *Course Fees* field. When you confirm employee attendance in a scheduled course for which you have specified a fee, the system automatically creates course fees in the employee's cost file.

Fee Type

Type **1** in this field if this is a per delegate fee. The system places the full amount of the course in the employee's course cost file. Type **2** in this field if the system should prorate the course amount among all attendees and place a portion of the fee on each employee's course cost file.

Value Code

Type a code that represents the value of this particular course; for example, a monetary value or the value to the company.

Education Units

Use this field to identify the number of units the participant receives after successfully completing the course. The system posts the value you enter into this field to training history when you use the *Update Attendance* function.

Training Hours

Use this field when the course is part of a training program. The system uses these hours as the default value when you create a scheduled course record.

Latest Assessment

Use this field to enter the most current assessment available for this course.

Course Number

If you number your courses, type the course number into this field.

Pre-Requisite Course

Use this field to identify a course that is a pre-requisite for this course. When you enter a value into this field, the system displays a warning when you use the *Update Attendance* function for employees who did not fulfill the pre-requisite. However, the system does not prevent you from enrolling employees who have not fulfilled the pre-requisite into the course.

Attendance Indicator

Use this field to specify the default value for the attendance indicator when you create a scheduled course.

Valid values are:

1	Attended
0	Did not attend

Course Level

Type a 1- to 2-digit value that identifies the level assigned to this course.

User Defined Codes

Use these two fields to enter code values associated with code types that you previously defined in the *Update User Defined Fields* function.

Description and Comments

The system provides both a short and a long *Description* field.

The long description is called expanded text. You can access it by positioning the cursor in the short description field and pressing F9. You can then enter up to 220 lines of additional text, which enables you to record complete descriptions of your course contents and course objectives.

The same feature is also available for the *Comments* field. Use the additional text for comments; for example, to record individual comments from employees who have attended the course.

6 Press F3 to exit and save.

Deactivating a Course with Associated Training Requests

If you deactivate a course on the Update Course screen, and if training requests exist for that course, Infinium TR gives you the option to delete the training requests, as follows:

1 From the Infinium TR main menu select *Course Catalog*.

2 Select *Courses*.

3 Select *Update Courses* [UC].

4 Type **2** to select a course on the Update Courses screen, similar to the screen shown in Figure 3-1, and the system displays the Update Course screen, similar to the screen shown in Figure 3-3.

```
 9/19/02  15:42:26             Update Course            TRGECM20   TRDECM20

Course ID  . . . . . .  ABCDEFJHIJ
Description  . . . . .  100-Basic Accounting Practices More ..
Creation Date  . . . .   7082002          Active . . . . . . . .  0
Course Type Code . . .  G     +           Study Type Code. . . .  C     +
Duration . . . . . . .    5.00            Hours or Days  . . . .  D  (H/D)
Category Code. . . . .  ACCOU +           Location ID  . . . . .  JON-1 +
Skill/Competency Code.  ACCT       +
Qualification  . . . .  _____             Required by Days . . .  ___
Documentation Code . .  MACL1 +           Frequency  . . . . . .  ___
Test Pass Mark . . . .   85               Pass Grade Code  . . .  _____ +
Course Provider ID . .  __________ +      Internal or External .  I  (I or E)
Course Fees  . . . . .  _____________.00  Currency Code  . . . .  ___ +
Cost Code & Fee Type .  _____ +  _        Value Code . . . . . .  _____ +
Education Units  . . .     .00            Training Hours . . . .     .00
Latest Assessment  . .  _____ +           Course Number  . . . .  __________
Pre-Requisite Course .  __________ +      Course Level . . . . .  ___
Attendance Indicator .  1
Tuition    Code  . . .  _____ +           % of Reimb Code  . . .  _____ +
Comments . . . . . . .  _____________________________________________ More ..

F3=Exit F4=Prompt F8=Exp Description F9=Exp Comment F10=QuikAccess F12=Cancel
```

Figure 3-3: Update Course screen – deactivate course

5 Type **0** in the *Active* field on the Update Course screen to deactivate the course.

6 Press F3 to exit and save your entries when you are done updating the selected course. If training requests exist for the deactivated course, the system displays an option window, similar to the window shown in Figure 3-4.

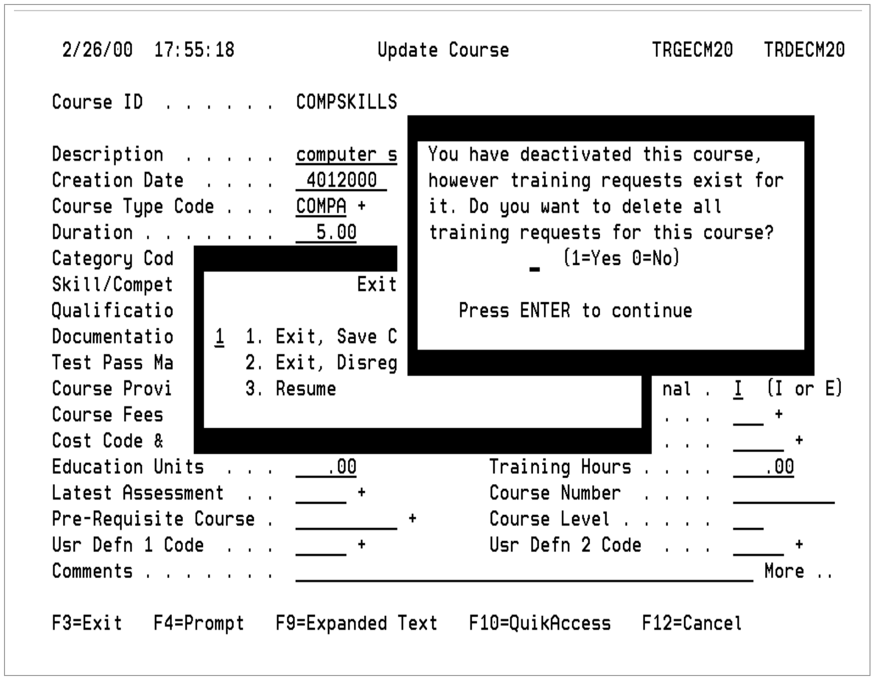


Figure 3-4: Update Course screen – delete training requests for course

7 Use the option window on this screen to do the following:

- Type **1** to delete the training requests from the deactivated course, or type **0** if you do not want to delete the training requests.
- Press Enter to continue and exit with saved changes.

Deactivating a Course That Exists in a Training Group

If you deactivate a course that exists in one or more training groups, Infinium TR gives you the option to delete the deactivated course from the training group, as follows:

1 From the Infinium TR main menu select *Course Catalog*.

2 Select *Courses*.

3 Select *Update Courses* [UC].

4 Type **2** to select a course on the Update Courses screen, similar to the screen shown in Figure 3-1, and the system displays the Update Course screen, similar to the screen shown in Figure 3-3.

5 Type **0** in the *Active* field on the Update Course screen to deactivate the course.

6 Press F3 to exit and save your entries when you are done updating the selected course. If the deactivated course exists in one or more training groups, the system displays an option window, similar to the window shown Figure 3-5.

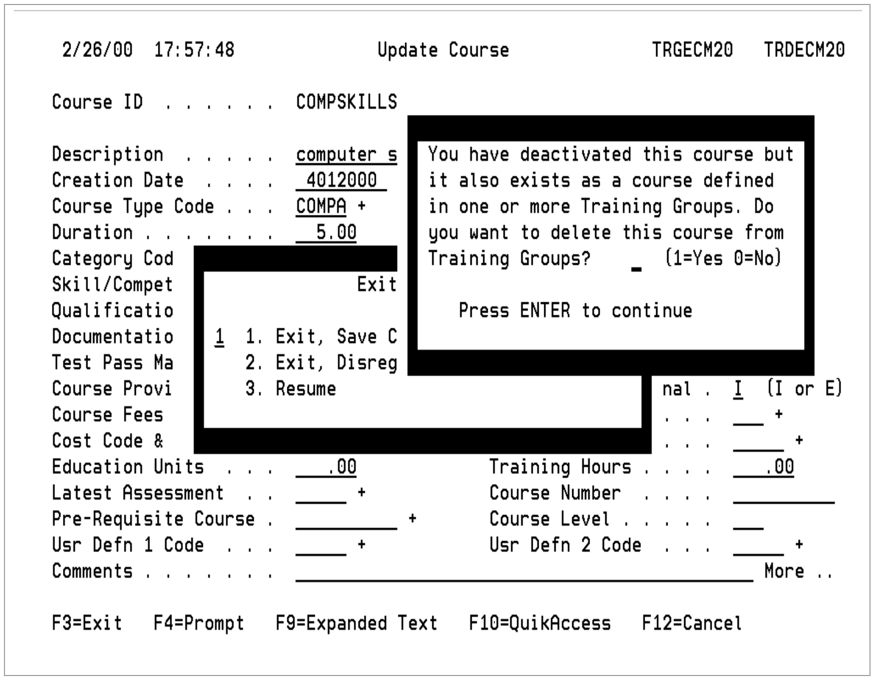


Figure 3-5: Update Course screen – delete course from training group

7 Use the option window on this screen to do the following:

- Type **1** to delete the deactivated course from the training group, or type **0** if you do not want to delete the deactivated course.
- Press Enter to continue and exit with saved changes.

If you delete the deactivated course, the system resequences any remaining courses in the training group.

Copying a Course

You can copy all course information to a new course code. To change the information for the new course, you can use the *Update Course* option.

Use the information below to copy a course.

1 From the Infinium TR main menu select *Course Catalog.*

2 Select *Courses.*

3 Select *Update Courses* [UC].

4 Type **3** next to the course to be copied. The system displays a window similar to Figure 3-6.

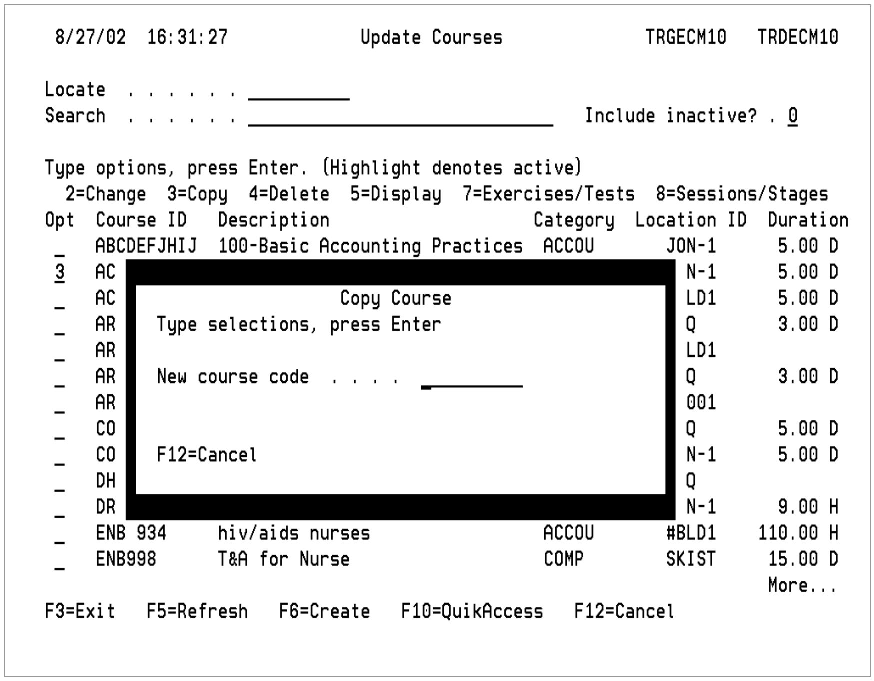


Figure 3-6: Update Courses Copy Course window

5 In the *New course code* field, type the code that identifies the new course.

6 Press Enter. The system adds the new course to the list of courses displayed on the Update Courses selection screen.

7 To modify the information for the course, type **2** next to the new course and press Enter. Use the information in the “Creating Courses in Infinium TR” section to complete the fields on the Update Courses screen.

Assigning Instructors to Courses

Overview

Both the course identifier and the instructor identifier must exist before you can assign an instructor to a course.

Not all instructors are qualified to teach all courses. You use the *Update Instructor Assignments* function to specify which instructors are allowed to teach which courses. The system then uses this information to ensure that when you schedule a particular course you assign only those designated instructors to teach it. Not only do you assign instructors to a course, but you can also prioritize these assignments to indicate which instructor you prefer to teach the course, which is your second choice, and so forth.

Assigning an Instructor to a Course

Complete the following steps to assign instructors to courses:

1. From the Infinium TR main menu select *Instructors*.
2. Select *Update Instructor Assignments* [UIA]. The system displays a screen similar to the screen shown in Figure 3-7.

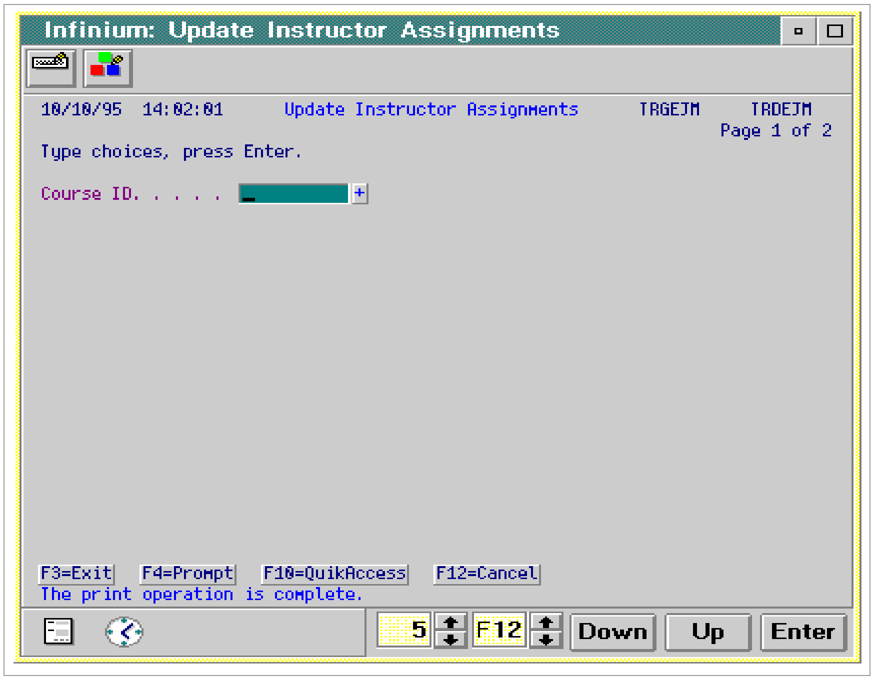


Figure 3-7: Update Instructor Assignments screen 1

Use this screen to specify the course for which you want to make instructor assignments.

3 Type the identifier for the course to which you want to assign instructors.

4 Press Enter. The system displays a screen similar to the screen shown in Figure 3-8.

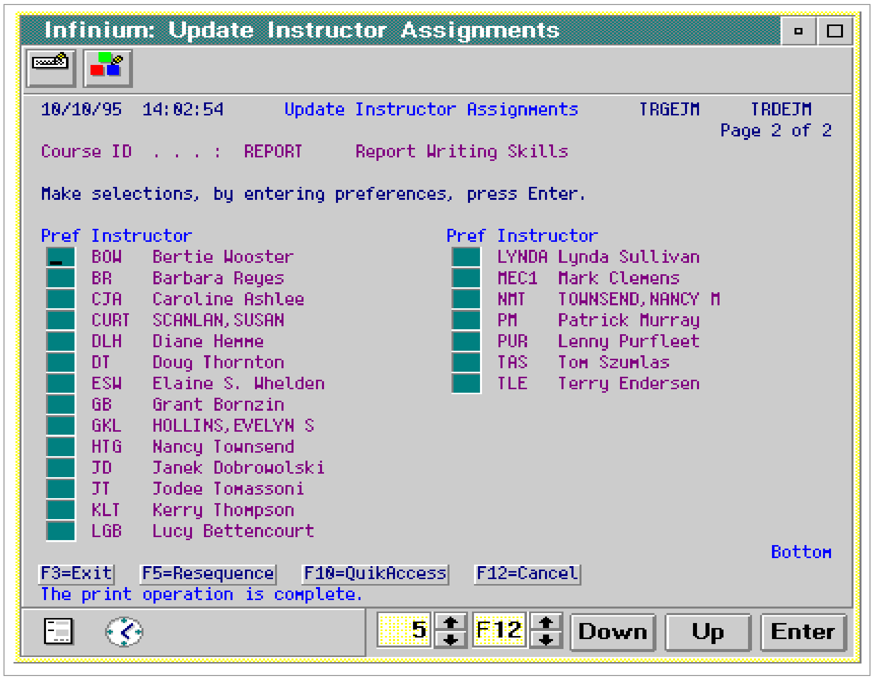


Figure 3-8: Update Instructor Assignments screen 2

This screen lists all the instructors who teach courses at your company. Use this screen to select and prioritize these instructors.

5 Type a preference number next to each instructor who will teach the specified course. You can enter preference numbers from 1 to 99 with the number 1 representing the most preferred instructor. Do not type a preference number next to an instructor who is not qualified or is not available to teach the course.

6 After you assign preference numbers, press F5 to list your priorities in sequence.

7 Press F3 to exit and save.

Assigning Courses to a Training Group

Overview

Training groups are values you create for code type TGP. You then assign courses to these training groups.

A training group defines a particular set of training courses. A typical use of a training group is to define all the courses that employees assigned to a specific position must take.

You use training groups to identify your employees' standard job training requirements. You can also use a training group to define core courses that all employees are required to take.

Each employee's basic data record in the Infinium HR system contains a training group code, which is set up in Infinium TR. It is associated with the employee's current position. When you hire, promote or transfer an employee to a new position, the Infinium HR system automatically updates the training group code on his or her basic data file with the value from the position record.

Because you have already defined the training courses in the new training group in Infinium TR, the system knows what the training requirements are and automatically creates the training request records for the appropriate courses. In the case of a new hire, for whom no training records yet exist, the system creates training requests for all the courses in the training group associated with the employee's position.

In the case of a promotion or transfer, the system looks at each course in the new training group and checks to see if the employee has already been trained in the course or has a training request on file. If not, the system automatically creates a training request. This feature eliminates manual entry of initial training requirements or those resulting from internal job changes.

If you have a core set of training courses that everyone in your organization must take, it is not necessary to set these up in every training group. Instead, you can set up a training group called *CORE and define these core courses just once. The system includes these core courses in addition to the position specific courses contained in the employees' regular training group.

For a detailed explanation of the tasks involved in this topic, refer to the “Linking Infinium TR and Infinium HR” chapter.

Training groups are used throughout Infinium TR to do the following:

- Identify a set of training courses
- Select a particular group of employees who have that training group code on their basic data record

You use training groups when you create course security, mass enroll employees in courses, and when you use the *Mass Refresher Requests - Trial & Create* and the *Mass Training Requests - Trial & Create* functions. You can use F4 to prompt and display a list of valid training groups whenever the cursor is on the *Training Group Code* field.

Identifiers for courses and the training group identifier must exist before you can assign courses to a training group.

Assigning Courses to a Training Group

Complete the following steps to assign courses to training groups. You can assign the same course to any number of different training groups.

1. From the Infinium TR main menu select *Master Files*.
2. Select *Training Group Courses*.
3. Select *Update Training Group Courses* [UTG]. The system displays a screen similar to the screen shown in Figure 3-9.

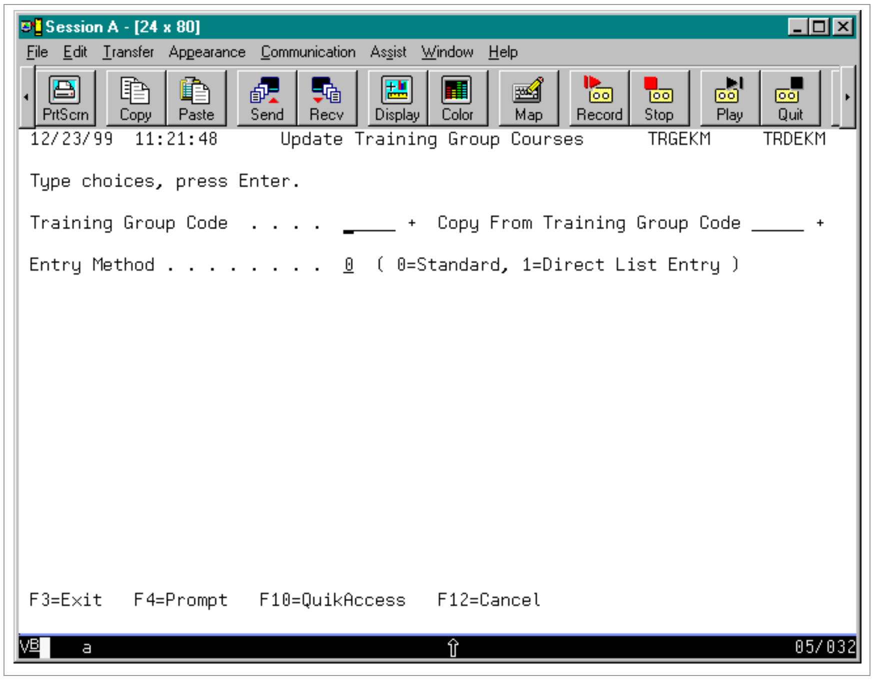


Figure 3-9: Update Training Group Courses screen

You can use this screen to specify the training group to which you are assigning courses and the method you want to use to do this. You can also use this screen to copy the existing courses from one training group to another training group that has no courses.

4 Type the identifier for the training group to which you want to assign courses in the *Training Group Code* field. If you want to use the copy function, the training group identified in this field cannot contain any courses. Do one of the following:

- To use the copy function, go to step 5.
- To bypass the copy function, go to step 6.

5 Type the identifier for the training group from which you want to copy courses in the *Copy From Training Group Code* field.

For example, if you want to copy the existing courses from training group CSKIL to training group WEB that has no courses, you type **WEB** in the *Training Group Code* field and then you type **CSKIL** in the *Copy From Training Group Code* field, as shown in Figure 3-10.

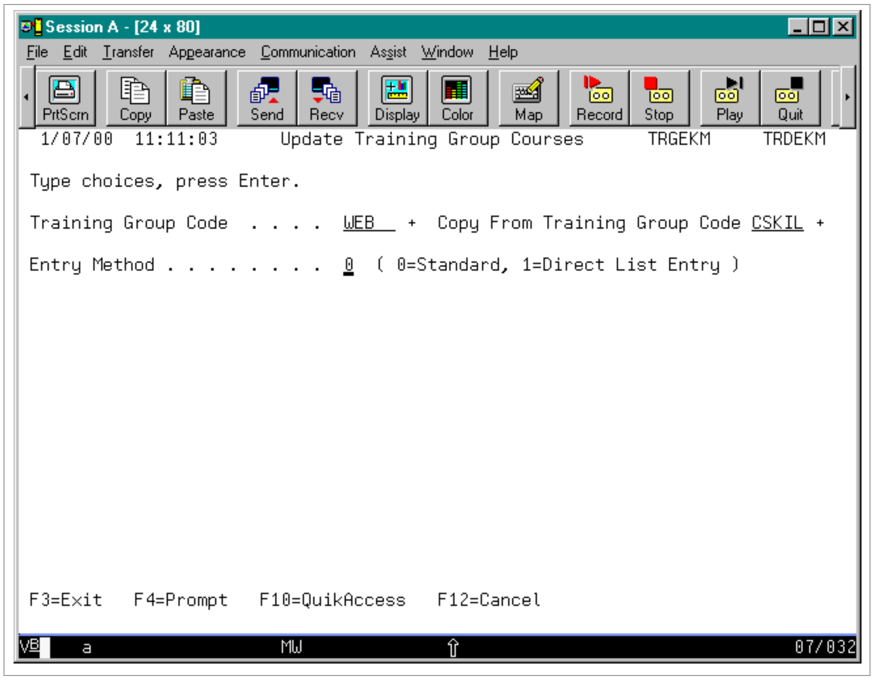


Figure 3-10: Update Training Group Courses screen – copy example

Infinium TR copies the existing courses from training group CSKIL to training group WEB. You can view the copied courses when you select either the Standard Entry Method or the Direct List Entry Method described below.

6 Do one of the following:

- Type **0** (Standard) in the *Entry Method* field to specify that you want to type in the actual courses associated with the training group. After you press Enter, go to step 7.
- Type **1** (Direct List Entry) in the *Entry Method* field to specify that you want to select from a list of courses. After you press Enter, go to step 11.

7 If you choose the standard method of entry, the system displays the Create Training Group Courses screen, similar to the screen shown in Figure 3-11.

Figure 3-11: Create Training Group Courses screen – standard method

You use this screen to do the following:

- Delete a course from the training group by selecting the course with **4**
- Add a course to the training group by pressing F6

If you type **4** to delete a course from a training group, and if employees in the group have training requests for the course you are deleting, Infinium TR gives you the option to delete these training requests. The system displays an option window, similar to the window shown in Figure 3-12.

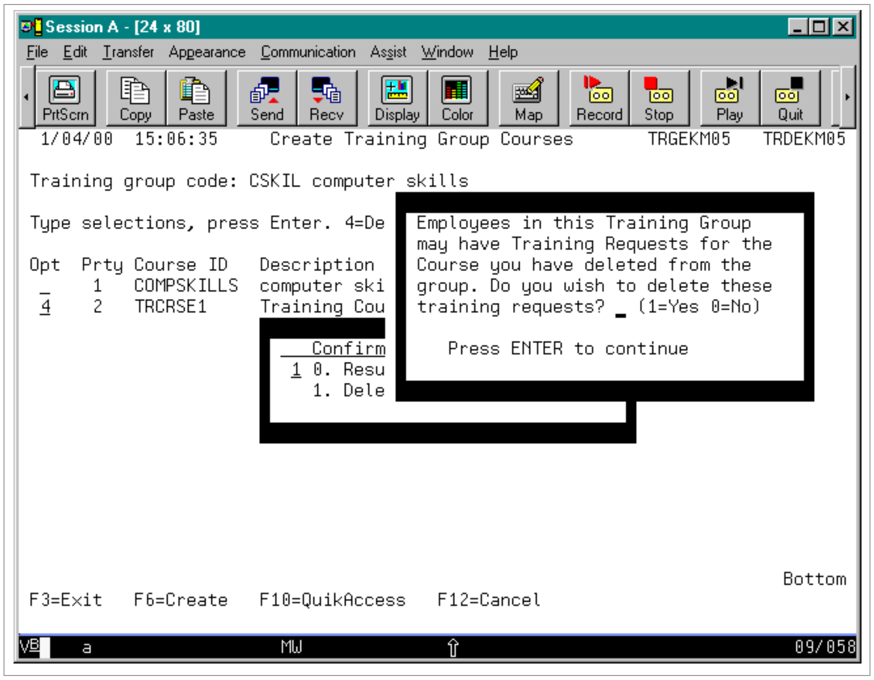


Figure 3-12: Create Training Group Courses screen – delete training requests

Use the option window on this screen to do the following:

- Type **1** to delete the training requests, or type **0** if you do not want to delete the training requests.
- Press Enter to continue deleting the course from the training group.

8 To create a new course assignment, press F6. The system displays a screen similar to the screen shown in Figure 3-13.

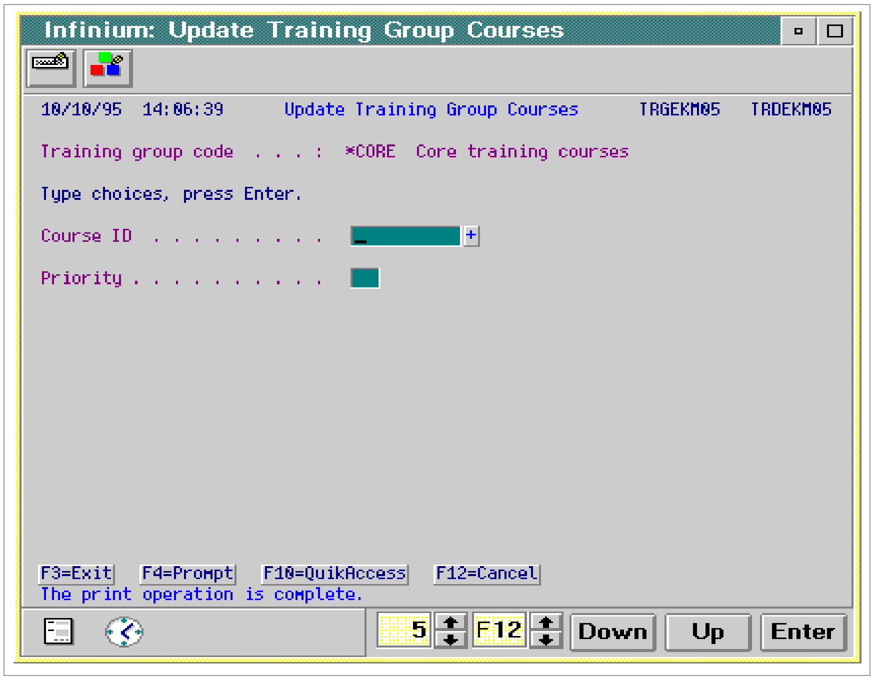


Figure 3-13: Update Training Group Courses screen

Use this screen to add a course to the training group and to specify its priority.

9 Complete the two fields on this screen. Type the identifier of the course you are adding to the training group or press F4 to select from a list of valid courses.

10 Press F3 to exit and save.

11 If you choose the direct method of entry, the system displays the Update Training Group Courses screen, similar to the screen shown in Figure 3-14.

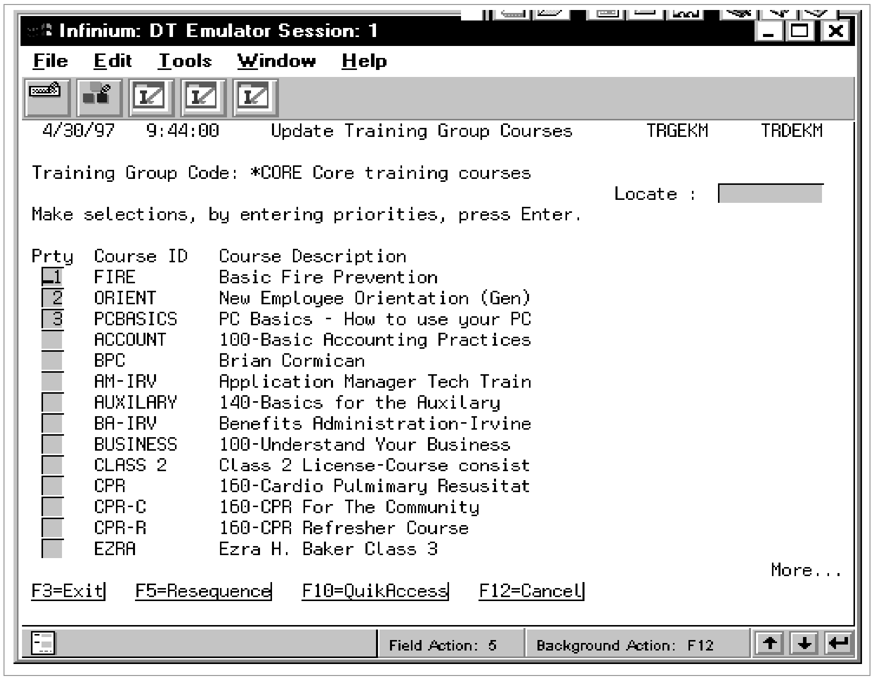


Figure 3-14: Update Training Group Courses screen – direct entry method

This screen lists all existing courses that you can include in the training group. Use this screen to add a course(s) to the training group by entering a priority number next to each.

If you used the copy function on the *Create Training Group Courses* screen, the system displays the courses that you copied in priority sequence as well as all other existing courses that you can include in the training group.

12 Type a preference number next to each course that you want to include in this training group. You can enter preference numbers from 1 to 99 with the number 1 representing the most preferred course for the group. Do not type a preference number next to a course that should not be included in the specified group.

13 To locate a course, position the cursor in the *Locate* field. Then type characters from the desired course ID. The system will immediately display the course record.

14 After you assign preference numbers, press F5 to list your priorities in sequence.

15 Press F3 to exit and save.

Creating Sessions and Stages

Overview

Creating sessions or stages for courses is optional. Training courses often include multiple course sessions or stages. There is no limit to the number of sessions or stages you can have for a course.

Sessions

Sessions let you subdivide a course into its component parts. A session may cover a specific course topic; for example, Introduction, Questions and Answers, or it could represent a time segment for a course.

Stages

Certain types of courses may have stages that precede or continue beyond the classroom part of the course. For example, there may be an action plan for the employee to try out new skills learned, follow-up review meetings, and so forth. Define course stages as part of your course definition to have access to update the course stages completion dates for employees who attend that course.

Use the *Update Sessions/Stages* function to create the sessions or stages that make up a course if you require them at your site.

Course identifiers and values for the SES code type (Session) must exist before you can create sessions. Values for the SKL (Skill) and TSK (Task) code types are optional as are identifiers for instructors, but you may require them at your site.

Creating Course Sessions or Stages

Complete the following steps to create course sessions or stages:

1. From the Infinium TR main menu select *Course Catalog*.
2. Select *Sessions/Stages*.

3 Select *Update Sessions/Stages* [USS]. The system displays a screen similar to the screen shown in Figure 3-15.

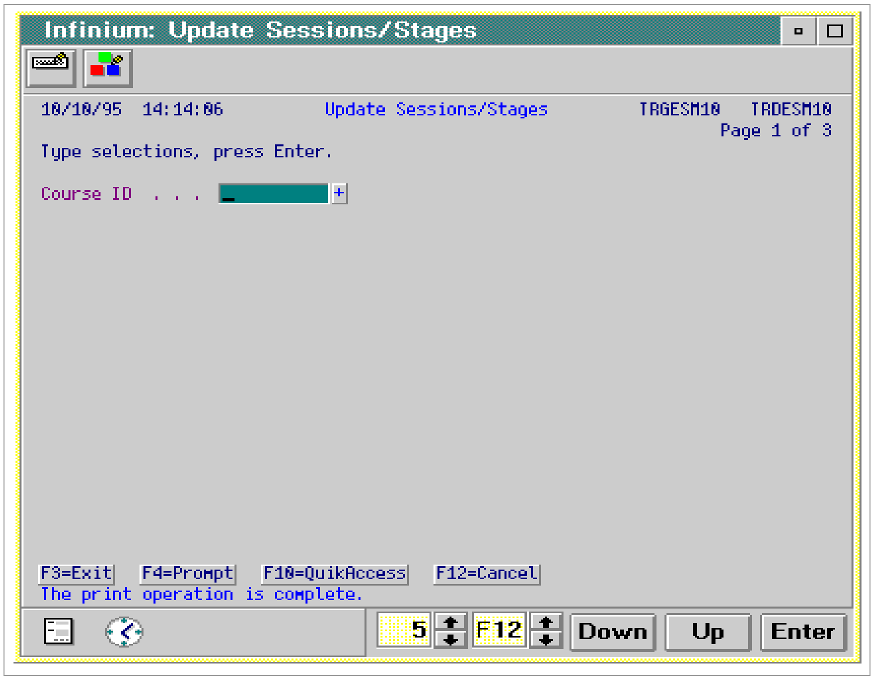


Figure 3-15: Update Sessions/Stages screen 1

Use this screen to identify the course to which you want to assign sessions and stages. You can also access this screen from the *Update Training Courses* function.

4 Type the identifier for the course to which you want to assign sessions on this screen.

5 Press Enter. The system displays a screen similar to the screen shown in Figure 3-16.

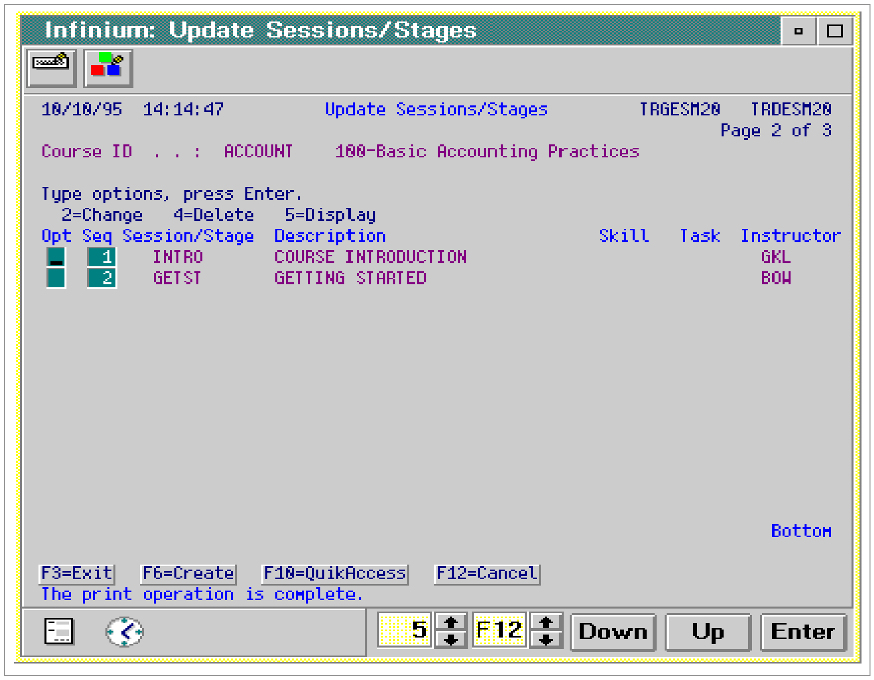


Figure 3-16: Update Sessions/Stages screen 2

This screen lists all sessions and stages for the course that have been entered into the system. You use this screen to do the following:

- Create a new session or stage by pressing F6
- Update a session or stage by selecting the session or stage with **2**
- Delete a session or stage by selecting the session or stage with **4**
- Display a session or stage by selecting the session or stage with **5**

6 Press F6 to create a new course session or stage. The system displays a screen similar to the screen shown in Figure 3-17.

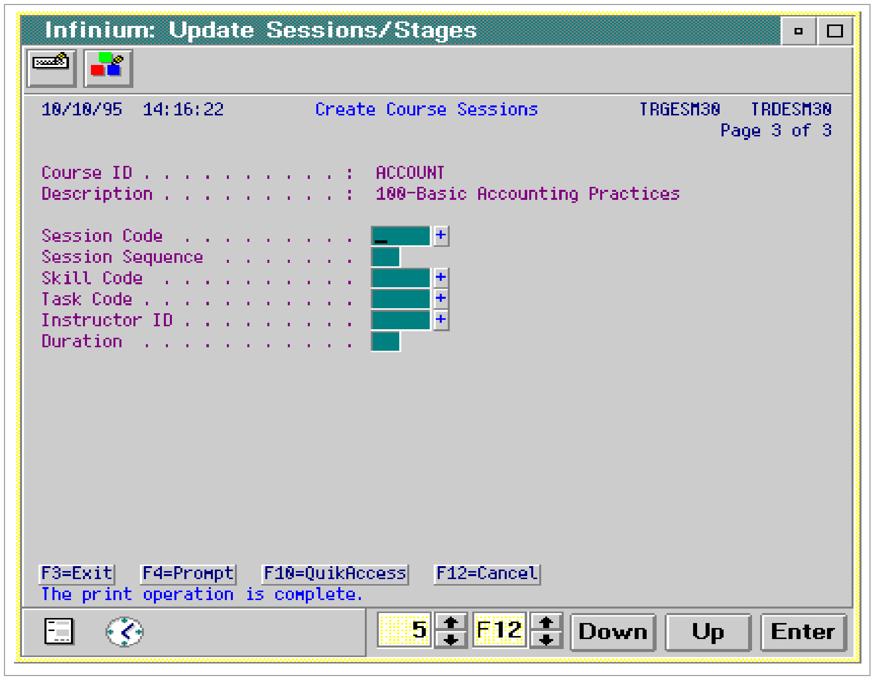


Figure 3-17: Create Course Sessions screen

Use this screen to enter the appropriate course session or stage information. You are required to enter values in the *Session Code* field.

7 Enter the course session or stage information using the information below to complete the fields on this screen.

Session Code

Use this field to identify the course session. You can use the same session code for more than one course. However, you cannot use the same session code more than once for the same course.

Session Sequence

Use a number from 1- 99 to define when the session is presented during the course in relation to other sessions.

Skill Code

Use this field to identify the skill associated with this session of the course.

Task Code

This field identifies the task associated with the skill defined in the previous field.

Instructor ID

The identifier you enter for the *Instructor ID* field specifies the instructor who is responsible for running this session.

Before you identify an instructor as responsible for a session, the instructor must be authorized to teach the course. You authorize instructors when you use the *Update Course Instructors* function.

Duration

The number you enter in this field identifies the number of hours the session of the course runs.

8 Press F3 to exit and save.

Creating Exercises and Tests

Overview

The course identifier must exist before you can create exercises and tests. Instructor identifiers and values for the NRM code type (Norm) are optional, but you may require them at your site.

Exercises

Infinium TR uses an exercise to measure employee competency levels. Competencies are typically business skills or abilities. Once you have created an exercise, you can specify the set of competencies it is designed to measure. There is no limit to the number of competencies that you can include in an exercise.

Tests

Infinium TR uses tests to record employees' scores or the results of specific tasks. You define exercises or tests as part of your course definition so that you can enter the actual results for employees who attended that course. Refer to the "Working with Course Attendance Records" chapter for related information on this topic.

Creating exercises and tests for courses is optional. You use the *Update Exercises/Tests* function to establish that specified exercises and tests are included in a course's requirements. There is no limit to the number of exercises or tests you can have for a course.

Creating Exercises and Tests

Complete the following steps to create tests and exercises:

1. From the Infinium TR main menu select *Course Catalog*.
2. Select *Exercises/Tests*.

3 Select *Update Exercises/Tests* [UET]. The system displays a screen similar to the screen shown in Figure 3-18.

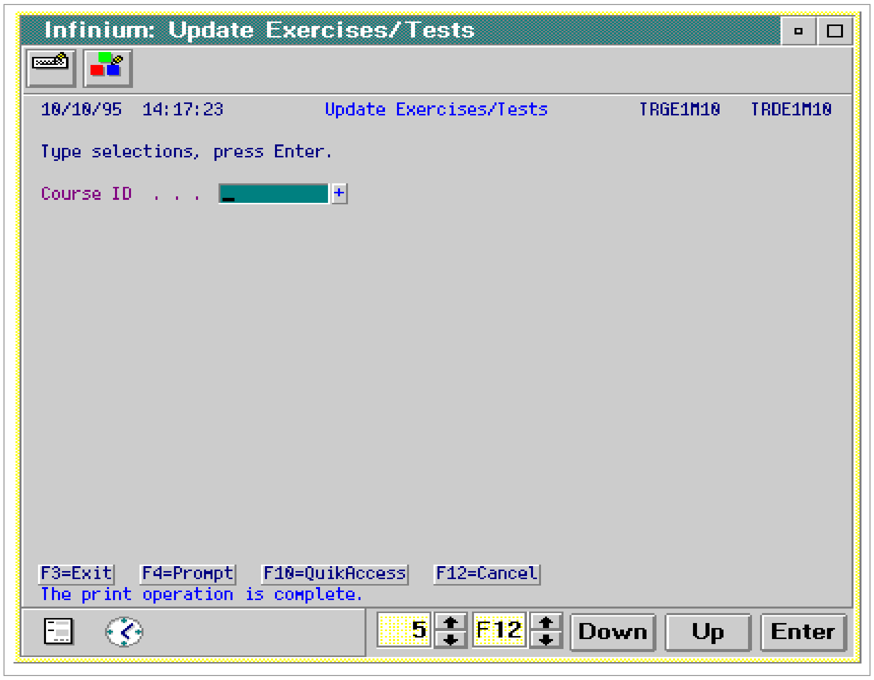


Figure 3-18: Update Exercises/Tests screen – identify course

Use this screen to identify the course to which you are assigning exercises or tests.

You can also access exercises and tests directly from the *Update Courses* function by using option **7** on the Update Courses screen.

4 Type the identifier for the course to which you want to assign exercises and tests.

5 Press Enter. The system displays a screen similar to the screen shown in Figure 3-19.

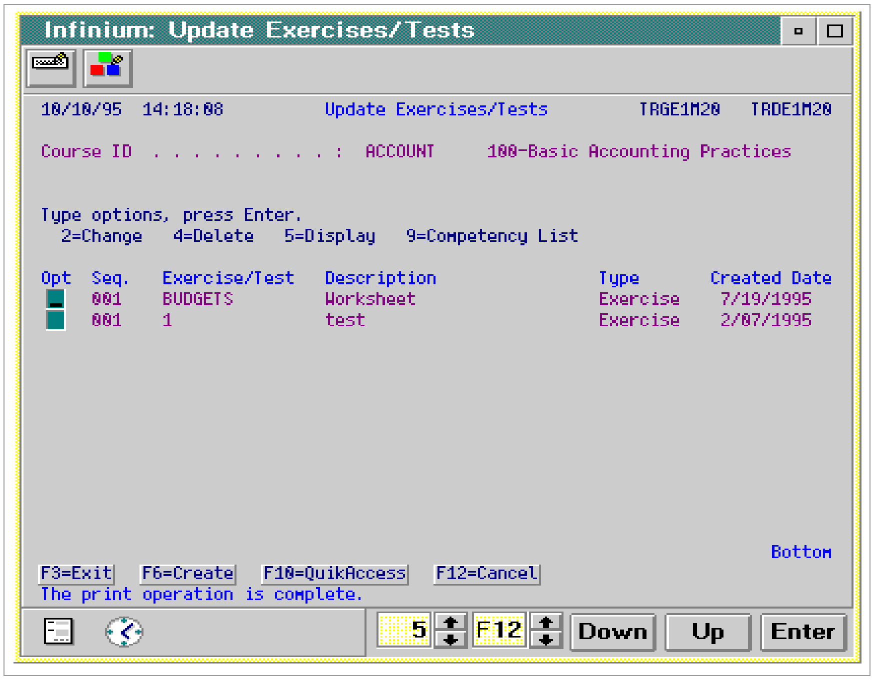


Figure 3-19: Update Exercises/Tests screen

This screen lists all exercises and tests for the course that have been entered into the system. You use this screen to do the following:

- Create a new exercise or test by pressing F6
- Update an exercise or test by selecting it with **2**
- Delete an exercise or test by selecting it with **4**
- Display an exercise or test by selecting it with **5**
- Work with exercise competencies by selecting the exercise with **9**

For more information, refer to the next topic in this chpater, “Creating Competencies for Exercises.”

6 Press F6 to create a new course exercise or test. The system displays a screen similar to the screen shown in Figure 3-20.

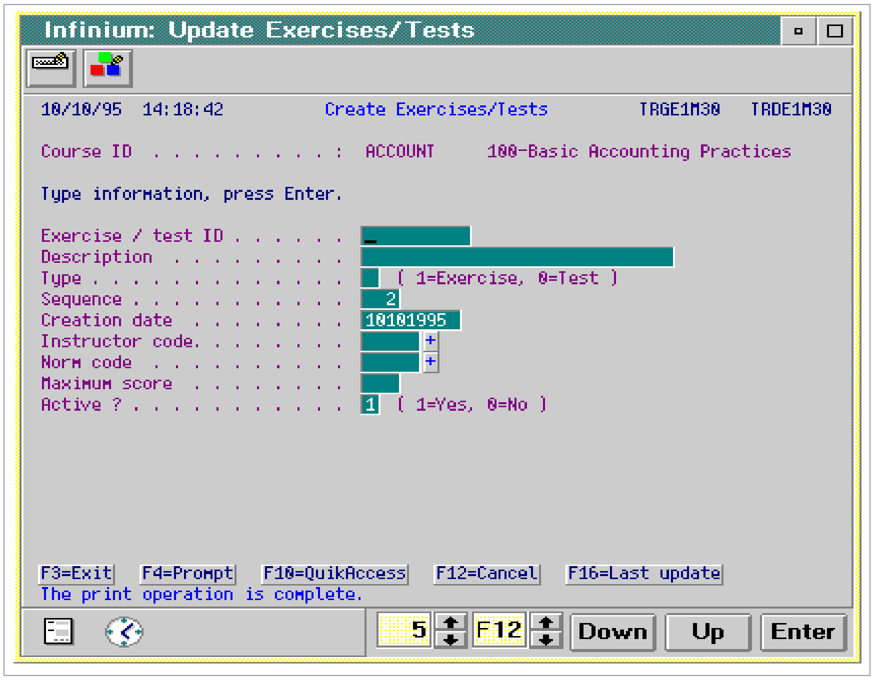


Figure 3-20: Create Exercises/Tests screen

You use this screen to enter course test or exercise information. You are required to enter data in the *Exercise/test ID, Description* and *Type* fields.

Press F16 to view the date and time this record was last updated as well as the user who made the update and the user's workstation.

7 Enter the exercise or test information. Use the following information to complete the fields on this screen.

Type

Use this field to indicate whether this is an exercise or test.

Sequence

The number you enter in the *Sequence* field defines the order in which that exercise or test displays in the list. You can enter sequence numbers from 1 to 99 with the number 1 representing the first test or exercise.

Creation date

The system uses the current date as the default value for this field. You can change it if necessary.

Instructor code

The identifier you enter in the *Instructor Code* field specifies which instructor is responsible for administering this exercise or test.

Norm code

The code value you type in this field is the average score recorded for employees taking the test or performing the exercise. You create norm codes when you use the *Update Codes* function, code type NRM.

Maximum score

The number you enter in this field is the highest score for the exercise or test. For example, if the test is being scored based on 100, type **100** in this field.

8 Press F3 to exit and save.

Creating Competencies for Exercises

Overview

You also use the *Update Exercises/Tests* function to define the competencies assessed during the exercise. Each competency includes a competency code, norm code and maximum score. You are not allowed to assign competencies to a test.

You can include the same competency in many different exercises. There is no limit to the number of competencies assessed in one exercise.

The course identifier and values for the CPT code type (Competency Code) must exist before you can create competencies. Values for the NRM code type (Norm) are optional, but you may require them at your site.

Establishing the Competencies to Include in Exercises

Complete the following steps to create competencies for exercises:

1. From the Infinium TR main menu select *Course Catalog*.
2. Select *Exercises/Tests*.
3. Select *Update Exercises/Tests* [UET]. The system displays the Update Exercises/Tests prompt screen, similar to the screen shown in Figure 3-18.
4. Type the identifier for the course to which you want to assign competency levels for exercises and tests.
5. Press Enter. The system displays the second Update Exercises/Tests screen, similar to the screen shown in Figure 3-19.
6. Type **9** in the *Opt* field next to the exercise to which you are assigning competency levels.
7. Press Enter. The system displays a screen similar to the screen shown in Figure 3-21.

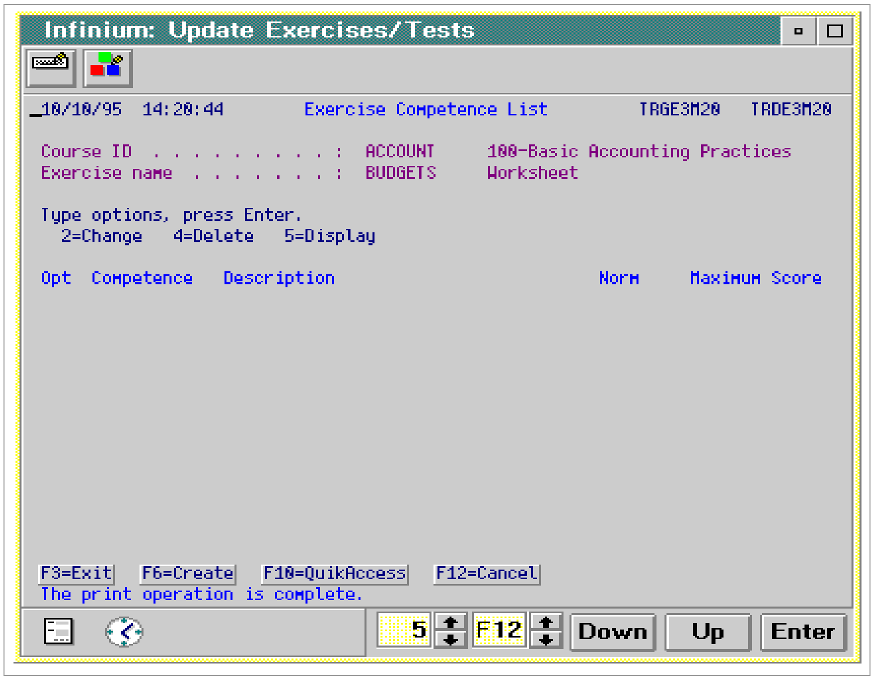


Figure 3-21: Exercise Competence List screen

This screen lists any competency information for the specified exercise or test that has been entered into the system. You use this screen to do the following:

- Create a new competency by pressing F6
- Update a competency by selecting it with **2**
- Delete a competency by selecting it with **4**
- Display a competency by selecting it with **5**

8 Press F6 to create a new competency record for the specified exercise. The system displays a screen similar to the screen shown in Figure 3-22.

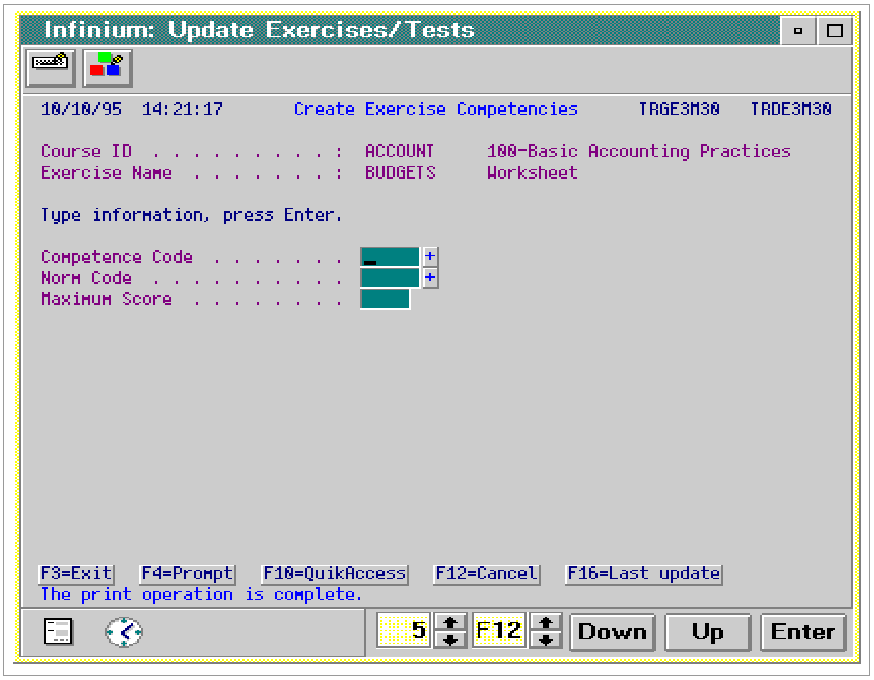


Figure 3-22: Create Exercise Competencies screen

Use this screen to enter competency information. You are required to enter a value in the *Competence Code* field.

Press F16 to view the date and time this record was last updated as well as the user who made the update and his or her workstation.

9 Enter competency information. Use the information below to complete the fields on this screen.

Competence Code

The value in this field identifies the competency to be assessed. You can only designate the same competency value to an exercise once. The code value you enter in this field is associated with code type **CPT**.

Norm Code

The value you enter in this field is the average score recorded for employees for this particular competency. You create norm codes, which may be numeric or alpha, when you use the *Update Codes* function, code type **NRM**.

Maximum Score

The number you enter in this field is the highest score for this competency exercise.

10 Press F3 to exit and save.

Chapter 4 Linking Infinium TR and Infinium HR

4

This chapter provides the steps you should follow in your Infinium HR system to create the necessary link between Infinium TR and Infinium HR.

The chapter consists of the following topics:

Overview of Linking

You can establish one of the main links between Infinium HR and Infinium TR by assigning training group codes to positions and employees in Infinium HR. A training group defines a set of required training courses. When you associate a position with a training group, you also associate the position with that set of required courses. Positions can share the same training group code and you can define a training course in more than one training group. The training group codes you use must exist in the Infinium TR system.

Purpose of the Training Group Link

You do not have to assign training group codes to position records. You can successfully operate Infinium TR without using training groups in Infinium HR. However, using training groups allows you to take advantage of the automatic interface between the two systems. The system automatically creates new training requirements for employees and it deletes old requirements in Infinium TR when employees are hired for positions, change positions in Infinium HR, or are terminated.

The following functions in Infinium HR have the built-in automatic interface:

- *Enter New Hires* - The system creates a training request record in Infinium TR for each training course you define in both the position's training group and the *CORE training group.
- *Enter Personnel Actions* and *Mass Update PE Actions* - The system creates a training request record in Infinium TR based on the training group of the position into which the employee is promoted, transferred, demoted, or re-hired. The system also automatically deletes any position-related training requests for the previous position's training group.

To establish a link between Infinium HR and Infinium TR by assigning training group codes to positions and employees in Infinium HR, you must define the following:

- Training groups in Infinium TR
- Positions for every employee in Infinium HR

Infinium HR Setup

You must complete the following steps to organize your Infinium HR system to use training groups in Infinium TR:

1. Assign training group codes to positions in Infinium HR.
2. Then do either of the following:
   - Assign current employees to the training group associated with their position in Infinium HR. This involves employee-by-employee manual entry, which may not be practical for large numbers of employees.
   - Use the Infinium TR *Load Training Groups* function to establish current employee training groups in Infinium HR. This batch job processes all employees.

Objectives

After you complete this chapter you should be familiar with the following:

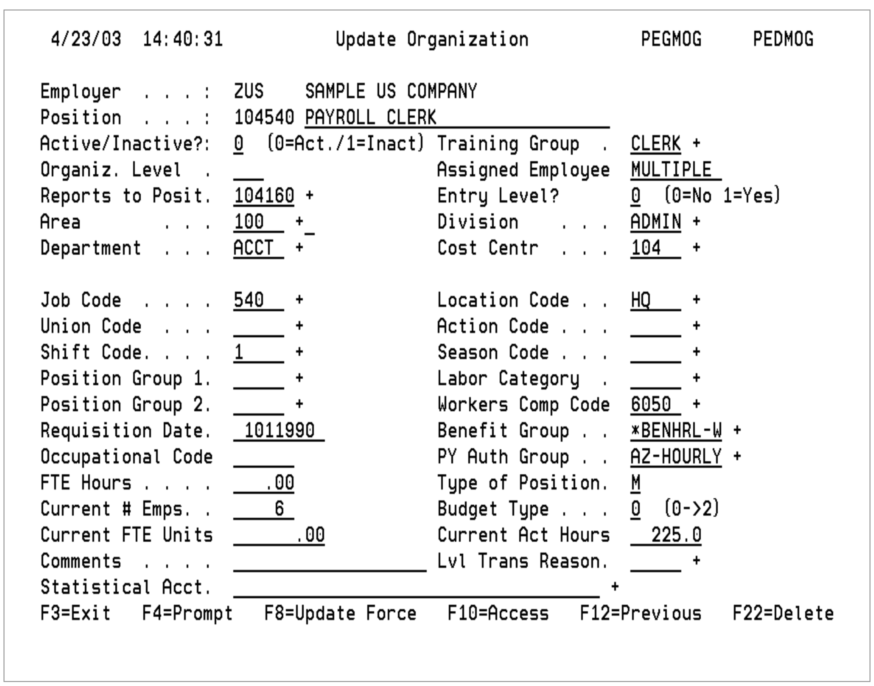
- Assigning Infinium TR training groups to positions in Infinium HR
- Assigning current employees to the training group associated with their position in Infinium HR
- Using the Infinium TR *Load Training Groups* function to establish current employee training groups in Infinium HR

Assigning Training Groups to Positions in Infinium HR

Follow the steps outlined below to assign training groups to positions in Infinium HR.

Caution: The training group information you use to complete this step is the training group information you created in Infinium TR. You should use the code values already established in Infinium TR for code type **TGP**.

1. From the Infinium HR main menu select *Master Files*.
2. Select *Update Master Files.*
3. Select *Update Position Data* [UO]. The system displays the Organization Update prompt screen.
4. Type the appropriate values in the *Employer* and *Position* fields.
5. Press Enter. The system displays a screen similar to the screen shown in Figure 4-1.



```
 4/23/03  14:40:31          Update Organization          PEGMOG     PEDMOG

Employer  . . . :  ZUS    SAMPLE US COMPANY
Position  . . . :  104540 PAYROLL CLERK
Active/Inactive?:  0  (0=Act./1=Inact) Training Group  .  CLERK +
Organiz. Level  .  ___                 Assigned Employee  MULTIPLE
Reports to Posit.  104160 +            Entry Level?       0  (0=No 1=Yes)
Area      . . .    100   +_            Division    . . .  ADMIN +
Department  . . .  ACCT  +             Cost Centr  . . .  104   +

Job Code  . . . .  540   +             Location Code . .  HQ    +
Union Code  . . .  _____ +             Action Code . . .  _____ +
Shift Code. . . .  1     +             Season Code . . .  _____ +
Position Group 1.  _____ +             Labor Category  .  _____ +
Position Group 2.  _____ +             Workers Comp Code  6050  +
Requisition Date.   1011990            Benefit Group . .  *BENHRL-W +
Occupational Code  ______              PY Auth Group . .  AZ-HOURLY +
FTE Hours . . . .     .00              Type of Position.  M
Current # Emps. .      6               Budget Type . . .  0  (0->2)
Current FTE Units        .00           Current Act Hours    225.0
Comments  . . . .  ___________________ Lvl Trans Reason.  _____ +
Statistical Acct.  ____________________________________ +
F3=Exit   F4=Prompt   F8=Update Force   F10=Access   F12=Previous   F22=Delete
```

Figure 4-1: Update Organization screen

Use this screen to identify the training group for the position.

6 Type the training group identifier for this position in the *Training Group* field. Or press F4 to display a list of training groups from which you can select a valid training group identifier. Press Enter to validate and save.

7 Press F3 to exit.

8 Repeat steps 6 and 7 for each position to which you want to assign a training group.

Assigning Training Groups to Current Employees in Infinium HR

Overview

Once you establish training group codes on your position records in Infinium HR, the system automatically updates the training group code on the employees' basic data records for all future new hires, promotions, transfers, demotions, and re-hires. However, the system does not automatically update an existing employee record with the training group code when you enter it on the position record.

This manual entry method may not be practical if you have large numbers of employees. The *Load Training Groups* function in *Utilities* may be more efficient. Refer to the next topic in this chapter, "Establishing Current Infinium TR Employee Training Groups in Infinium HR," for more information.

Assigning Training Groups to Current Employees

Complete the following steps to manually assign training groups to your current employees. From the Infinium HR main menu select *Employee Data.*

1. Select *Update Employee Data.*
2. Select *Update Employee Data* [UE]. The system displays the Employee Update prompt screen.
3. Type the identifier for the employer and employee.
4. Press Enter. The system displays the second Employee Update screen.
5. Select *Basic Data* from the available options. The system displays the first Update Employee Basic Data screen.
6. Press Enter. The system displays the second Update Employee Basic Data screen, similar to the screen shown in Figure 4-2.

```
 4/23/03  14:52:14      Update Employee Basic Data        PRGMMS     PRDMMS
Employer  . . . :  ZUS    SAMPLE US COMPANY                     Page  2 of  5
Employee  . . . :       3727    WINTER,APRIL

                           Job Related Information
Position  . . . :  101200
Position Title  .  PAYROLL CLERK               Officer of Company? .  _
Job Code 1  . . :  200                   Seniority Date  .  8022001
Job Code 2  . . .  _____ +               Seniority Date  .  ________
Job Code 3  . . .  _____ +               Seniority Date  .  ________
EEO Category  . :  2A                    Status  . . . . .  FULL  +
Ethnic ID . . . .  1 +                   Previous Status .  _____ +
EEO-4 Function  .  ___                   Status Chg Date .  ________
Full Time ? . . .  1                     Union . . . . . :
Shift . . . . . .  3    +                Union ID. . . . .  __________
PE Benefit Group.  *BENSAL-B +           Union Elig. Date.  ________
Sup. Employer . .  ZUS +                 Sup. Name: BOMB,SCHUSS                +
                          Performance Information
Next Review . . .  PROB  +               Training Group  .  _____ +
Next Review Date.  ________              Last Rating . . .  _____ +
Promotion . . . .  _____                 Last Rating Score     .00

F3=Exit   F4=Prompt   F8=Add'l Pos   F10=Access   F12=Previous   F16=Update/End
```

Figure 4-2: Update Employee Basic Data screen

Use this screen to identify the employee’s training group.

7 Use the *Training Group* field to type the appropriate training group identifier for the employee’s position that appears on this screen.

8 Press Enter to save.

9 Press F3 to exit.

10 Repeat steps 4 through 9 for each employee you want to update.

The next series of screens shows the relationship between employee position and training group assignments in the Infinium HR module and the training group and courses in Infinium TR.

In Figure 4-3 the Update Organization screen in the Infinium HR *Update Position Data* function shows the employee position as **PAYROLL CLERK** and the Training Group as the **CLERK** training group.

```
 4/23/03  14:40:31          Update Organization          PEGMOG     PEDMOG

Employer  . . . :  ZUS    SAMPLE US COMPANY
Position  . . . :  104540 PAYROLL CLERK
Active/Inactive?:  0  (0=Act./1=Inact) Training Group  .  CLERK +
Organiz. Level  .  ___                 Assigned Employee  MULTIPLE
Reports to Posit.  104160 +            Entry Level?       0  (0=No 1=Yes)
Area        . . .  100   +_            Division    . . .  ADMIN +
Department  . . .  ACCT  +             Cost Centr  . . .  104   +

Job Code  . . . .  540   +             Location Code . .  HQ    +
Union Code  . . .  _____ +             Action Code . . .  _____ +
Shift Code. . . .  1     +             Season Code . . .  _____ +
Position Group 1.  _____ +             Labor Category  .  _____ +
Position Group 2.  _____ +             Workers Comp Code  6050  +
Requisition Date.   1011990            Benefit Group . .  *BENHRL-W +
Occupational Code  ______              PY Auth Group . .  AZ-HOURLY +
FTE Hours . . . .     .00              Type of Position.  M
Current # Emps. .      6               Budget Type . . .  0  (0->2)
Current FTE Units        .00           Current Act Hours    225.0
Comments  . . . .  ___________________ Lvl Trans Reason.  _____ +
Statistical Acct.  ____________________________________ +
F3=Exit   F4=Prompt   F8=Update Force   F10=Access   F12=Previous   F22=Delete
```

Figure 4-3: Update Organization screen

In Figure 4-4 the Update Employee Basic Data screen in the Infinium HR *Update Employee Data* function shows the specified employee's position as **PAYROLL CLERK** and the training group as **CLERK**.

```
 4/23/03  14:52:14      Update Employee Basic Data        PRGMMS     PRDMMS
Employer  . . . :  ZUS    SAMPLE US COMPANY                     Page  2 of  5
Employee  . . . :       3727    WINTER,APRIL

___________________________ Job Related Information ___________________________
Position  . . . :  101200
Position Title  .  PAYROLL CLERK                   Officer of Company? .  _
Job Code 1  . . :  200                  Seniority Date  .   8022001
Job Code 2  . . .  _____ +              Seniority Date  .  ________
Job Code 3  . . .  _____ +              Seniority Date  .  ________
EEO Category  . :  2A                   Status  . . . . .  FULL  +
Ethnic ID . . . .  1 +                  Previous Status .  _____ +
EEO-4 Function  .  ___                  Status Chg Date .  ________
Full Time ? . . .  1                    Union . . . . . :
Shift . . . . . .  3     +              Union ID. . . . .  __________
PE Benefit Group.  *BENSAL-B +          Union Elig. Date.  ________
Sup. Employer . .  ZUS +                Sup. Name: BOMB,SCHUSS                  +
__________________________ Performance Information ____________________________
Next Review . . .  PROB  +              Training Group  .  CLERK +
Next Review Date.  ________             Last Rating . . .  _____ +
Promotion . . . .  _____                Last Rating Score     .00

F3=Exit   F4=Prompt   F8=Add'l Pos   F10=Access   F12=Previous   F16=Update/End
```

Figure 4-4: Update Employee Basic Data screen

In Figure 4-5 the Create Training Group Courses screen in the Infinium TR *Update Training Group Courses* function lists the core courses required for all employees in the **CLERK** training group.

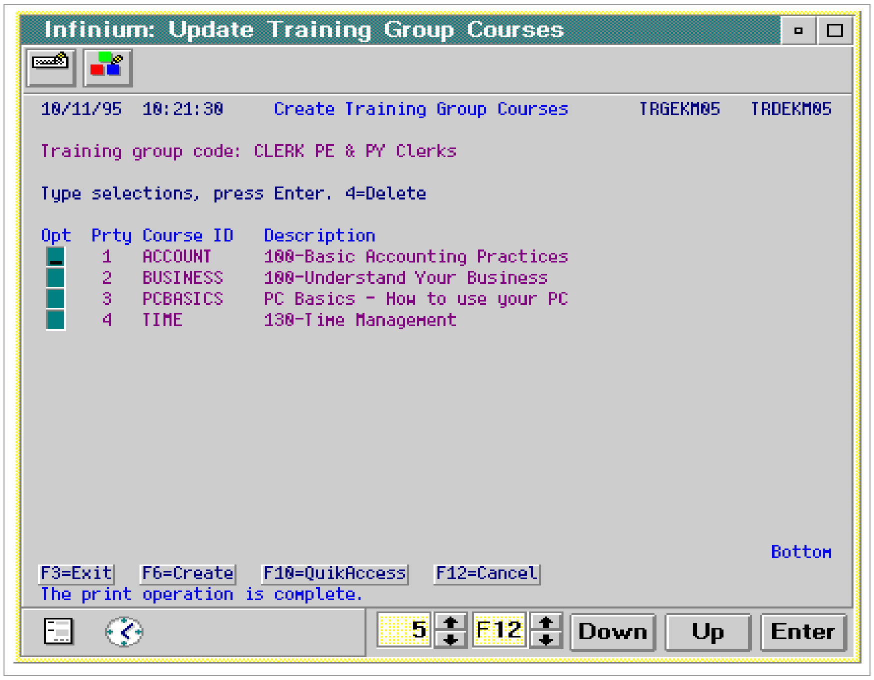


Figure 4-5: Update Training Group Courses screen

Establishing Current Infinium TR Employee Training Groups in Infinium HR

Overview

You use *Load Training Groups* to populate the *Training Group* field on the employee's basic data file, using the training group identifier on the employee's position control.

This is the mass update alternative to the manual entry method described in the previous topic in this chapter.

Updating an Employee's Training Record

Complete the following steps to update the employee's training record:

1 From the Infinium TR main menu select *Utilities*.

2 Select *Load Training Groups* [LOADTRGGRP]. The system displays a screen similar to the screen shown in Figure 4-6.

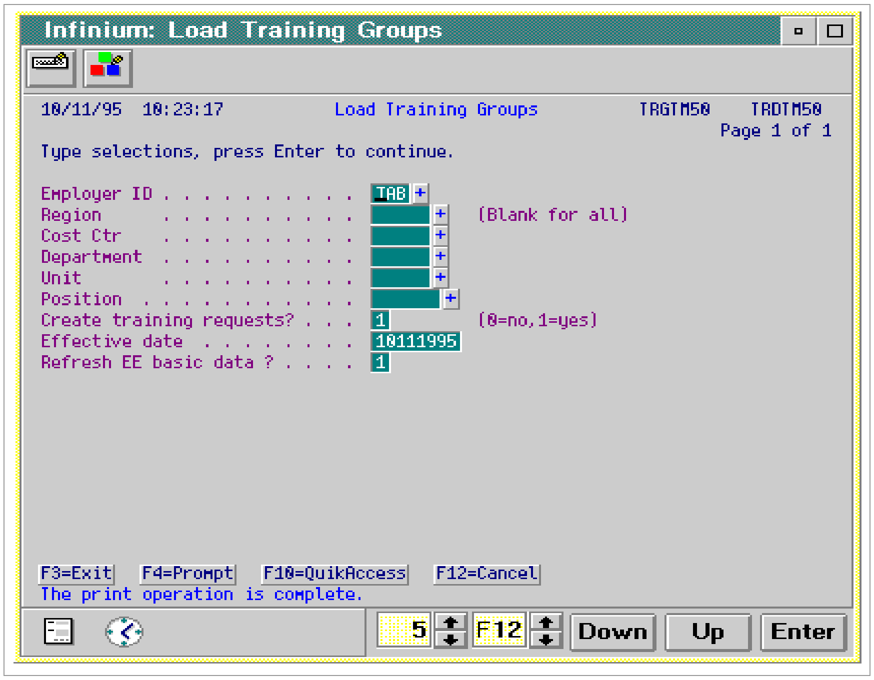


Figure 4-6: Load Employee Training Groups screen

You use this screen to specify details for the training group update. You must type a value in the following fields: *Employer ID*, *Create training requests?, Effective date,* and *Refresh EE basic data?*

3 Use the following information to complete the fields on this screen.

Create training requests?

Specify whether or not you want to create training requests for the selected training groups by typing **1** (Yes) or **0** (No) in this field. If you choose to create these training requests, you must type a date in the *Effective date* field.

Refresh EE basic data?

To update the *Training Group* field on the individual employee records from the *Training Group* field on the position record, type **1** in this field. If you type **0** in this field, the system does not update the employee basic data records that have a value in the *Training Group* field.

Levels and Positions

If you leave the levels (on the screen above, these are defined as *Region*, *Cost Ctr*, *Department* and *Unit*) and *Position* fields blank, the system updates data for all employees, levels and positions in the specified company.

4 Press Enter when all your entries are correct. The system updates the employee records, returns to the *Utilities* menu, and displays the following message at the bottom of the screen:

Request completed normally

Chapter 5 Scheduling Courses

5

You use the tasks described in this chapter to schedule courses and to assign instructors and classrooms for those courses. You can also allocate equipment for courses and course sessions.

The chapter consists of the following topics:

Overview of Course Scheduling

You use the *Update Course Schedule* function to specify the course's classroom, instructor(s) and equipment.

You can enter identifiers only for instructors who are authorized to teach the course. You authorize instructors to teach specific courses using the *Update Instructor Assignments* function.

You use the *Update Course Schedule* function to update course schedule information and to create that information. You can update scheduled course information by selecting the course with option **2** (Update). You can also update the classroom, instructor and equipment availability calendars.

You use option **10** (Reschedule) in the *Update Scheduled Course* function to reschedule a course to a new date, start time or classroom. The system defaults the original classroom and changes any existing course enrollments, course sessions or allocated course equipment or exercises (tests) to the course record for the new date. A scheduled course cannot already exist for the new start date and classroom and start time. In addition, the classroom must be available for that date and time.

You can create training requests and course enrollments after you schedule courses. For more information, refer to the parts in this guide on "Creating Training Requests" and "Creating Course Enrollments."

If you run regular courses that differ only by their dates, times or classroom, you will find it helpful to use the course copy option. This option allows you to copy a scheduled course to other course dates as well as the equipment reserved for the course.

Purpose of the Calendar Functions

The *Classroom Availability*, *Instructor Availability*, *Equipment Availability* functions allow you to view availability details of specific classrooms, instructors and equipment. In addition to viewing whether these are available, you can also create a special unavailability record for the classroom, instructor and piece of equipment. For example, you create an unavailability record if a classroom is being refurbished or if an instructor is on vacation.

These unavailability records are only for exceptions. You do not have to create unavailability records for the normally scheduled course dates for classrooms, instructors or equipment.

You do not have to check availability in order to enter course scheduling information. However, you may find it useful to do so. The scheduling functions automatically validate your entries and prevent you from entering conflicting data. The system does not allow you to request a classroom that has been previously scheduled for that date and time. However, it does allow you to assign an instructor who is scheduled to teach another course at that time.

Objectives

After completing this chapter you should be familiar with how to use the system to determine the availability of classrooms, instructors and equipment and to enter scheduling information for the courses in your course catalog.

You must schedule courses before you can create enrollment and attendance records.

Determining Availability of Classrooms, Instructors and Equipment

Overview

To determine classroom availability, you can use the *Classroom Availability* and *Print Classroom Availability* functions in *Calendar Functions*, or the *Print Classroom Schedule* function in *Calendar Functions* and in *Course Scheduling*.

To determine instructor availability, you can use the *Instructor Availability* and *Print Instructor Availability* functions in *Calendar Functions*, or the *Print Instructor Assignments* function in *Instructors*.

To determine equipment availability, use the *Equipment Availability* and *Print Equipment Availability* functions in *Calendar Functions*.

Values must be assigned to the **EQP** (Equipment), **ROM** (Classroom) and **STS** (Status) code types, and identifiers for instructors must exist before you can determine the availability of classrooms, equipment and instructors. Identifiers for course locations and courses are optional for availability purposes, but you can require them at your site.

Determining Availability

Follow the steps below to inquire about classroom, instructor or equipment availability:

1. From the Infinium TR main menu select *Calendar Functions*.

2. Select the function that is appropriate to your needs:

   - *Classroom Availability* [CLASSAVAIL]
   - *Instructor Availability* [INSTAVAIL]
   - *Equipment Availability* [EQUIPAVAIL]

   The system displays the appropriate availability screen (Classroom Availability, Instructor Availability, or Equipment Availability). For the purposes of this guide, we use only the Classroom Availability screens, such as the screen shown in Figure 5-1.

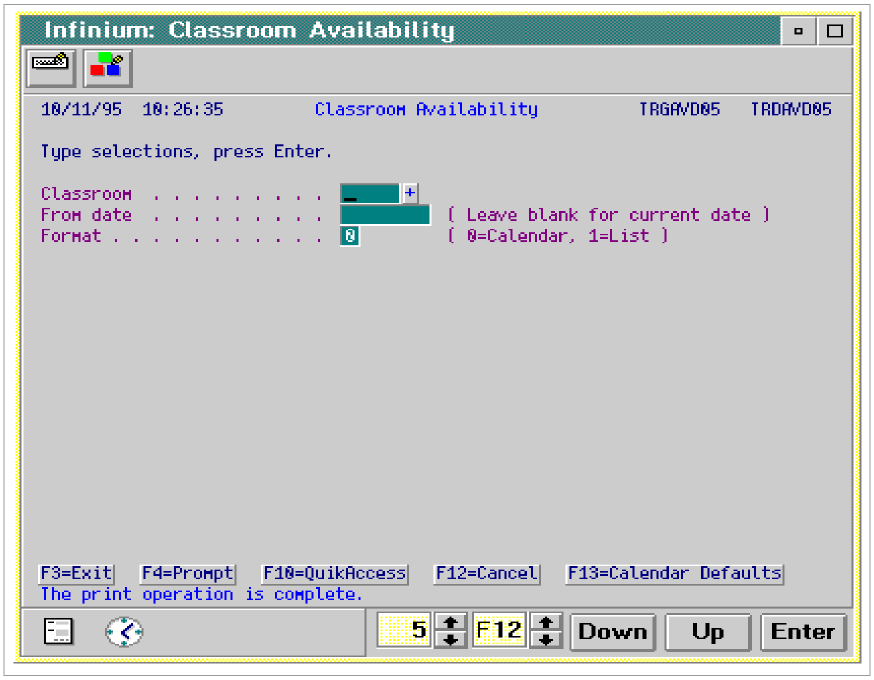


Figure 5-1: Classroom Availability screen

On this screen you can identify the classroom (instructor or equipment) that you are checking for availability.

You can also press F13 on this screen to access the Calendar Identifiers window, shown in Figure 5-4.

3 Use the following information to complete the fields on this screen.

Classroom, Instructor, Equipment

Type the identifier for the classroom, the instructor or the equipment for which you want display availability. You can press F4 to display a list of valid classrooms, instructors or equipment from which you can select.

From date

If you leave this field blank, the system uses the current date. If you select the list format, the system uses the value you type in this field to begin the list. If you select the calendar format, the system displays the calendar beginning with the month and year you type in this field.

Format

You can select either a calendar format or a list format for viewing classroom, instructor, or equipment availability. Type **0** for calendar format or type **1** for list format.

Both formats position the cursor at the beginning date of an available record if the date you type in the *From date* field is within the beginning and ending dates of the course.

4 Press Enter. Depending on the format you selected, the system displays a screen showing classroom, instructor, or equipment availability in either the calendar format or the list format.

If you selected the calendar format, the system displays a screen similar to the screen shown in Figure 5-2.

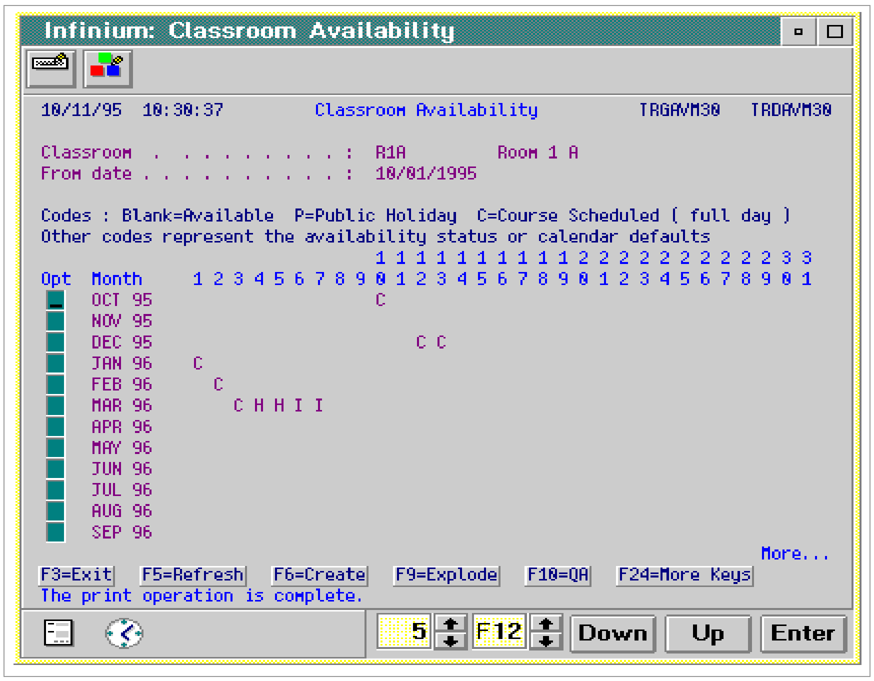


Figure 5-2: Classroom Availability screen – calendar format

You use this screen to do the following:

- Create an availability entry by pressing F6. If you press F6 when the cursor is positioned on a particular date, the system automatically defaults that date into the *From date* field on the screen. For an explanation of the steps you follow to create an unavailability record, refer to the “Creating an Unavailability Record” section in this topic.
- Display the details for an individual date’s calendar code by pressing F9. You can use this function key only on a valid date and you must position

the cursor on the calendar code for which you want to view details. Using the screen above as an example, if you position the cursor on code *C* and press F9, the system displays training course data. If you position the cursor on code *H* and press F9, the system displays classroom availability information.

- Display default values in the Calendar Identifiers window by pressing F13.
- Display the availability information in list format by pressing F16.

The system displays the calendar beginning at the start of the month of the date you entered. The following is an explanation of the codes displayed on the dates on the calendar:

- If the field is blank, the classroom/instructor/equipment is available.
- Code **P** indicates the day is a public holiday. The system retrieves public holidays from the first employer found in the PRPHU file.
- Code **C** indicates that the classroom/instructor/equipment is scheduled for a full day.
- User-defined availability codes indicate the identifier you want to use for *Weekend*, *Unavailable morning*, or *Unavailable afternoon*. You define these codes in the Calendar Identifiers window after your press F13 on the initial screen.

For more information on the Calendar Identifiers window, refer to the "Change Calendar Identifiers" section in this topic.

- Other codes on the calendar identify entries from the availability file. When you create an unavailability record using the Classroom Availability screen, you must type a value in the *Status* field.

  You define status values using the *Update Codes* function for code type **STS** (Status Code). When you create status code values, you must also provide a calendar code for each status. The system displays this code (one character) on the calendar.

If, on the screen shown in Figure 5-2, you select a month by typing any character in the *Opt* field and pressing Enter, the system displays a screen similar to the screen shown in Figure 5-3.

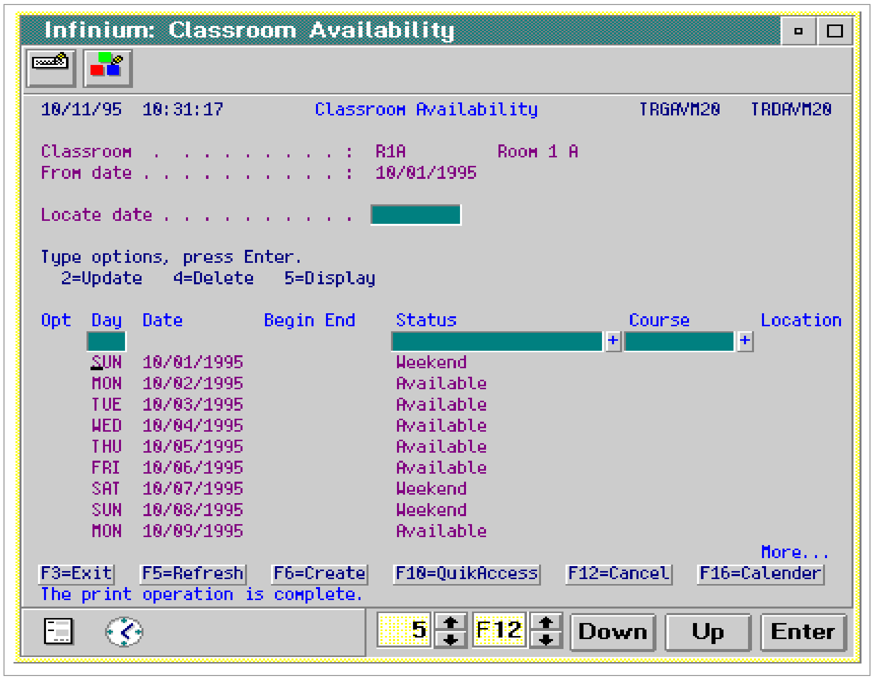


Figure 5-3: Classroom Availability screen – list format

Use this screen to do the following:

- Create a new unavailability record by pressing F6

For an explanation of the steps you follow to create an unavailability record, refer to the “Creating an Unavailability Record” section in this topic.

- Update an unavailability record by selecting the record with **2**
- Delete an unavailability record by selecting the record with **4**
- Display an unavailability record by selecting the record with **5**
- Display the availability information in calendar format by pressing F16

Change Calendar Identifiers

Press F13 on the first Classroom Availability screen, shown in Figure 5-1. The system displays the Calendar Identifiers window, similar to the window shown in Figure 5-4.

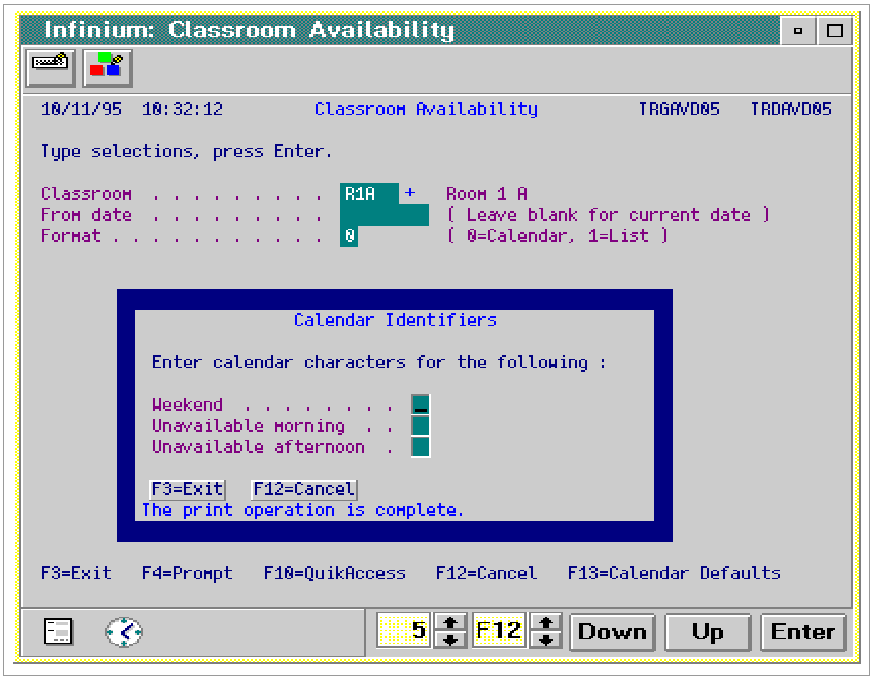


Figure 5-4: Calendar Identifiers window

Use this window to enter the character that will represent weekends, the character that will represent unavailability in the morning, and the character that will represent unavailability in the afternoon.

Morning availability means that no course is scheduled with a start time prior to 1:00 p.m. Afternoon availability means that no course is scheduled with an end time after 1:00 p.m.

If you select the list format on the first Classroom Availability screen, as shown in Figure 5-1, the system displays a screen similar to the screen shown Figure 5-5.

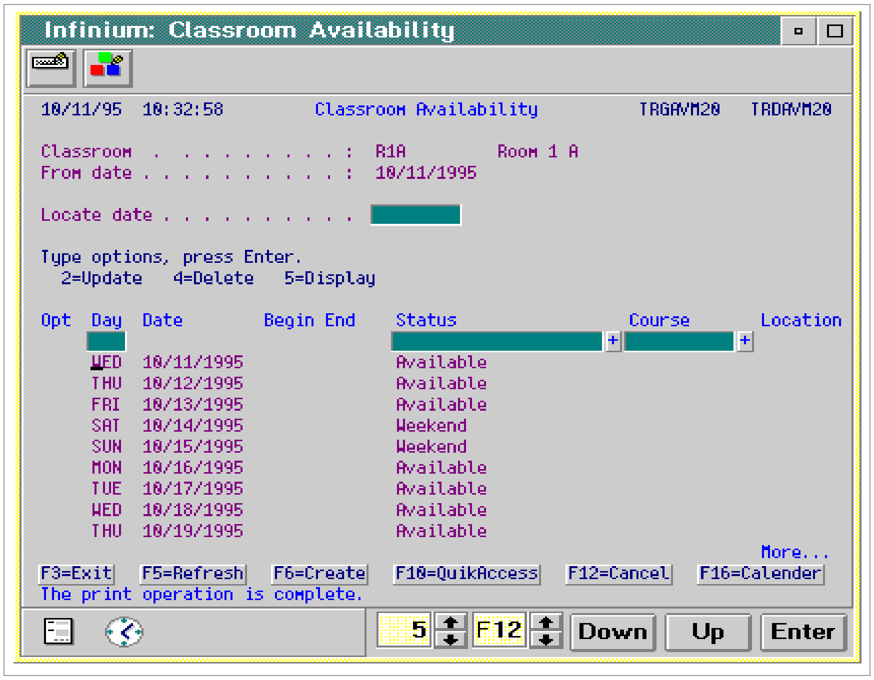


Figure 5-5: Classroom Availability screen – list format

Use this screen to do the following:

- Create an availability entry by pressing F6

  For an explanation of the steps you follow to create an unavailability record, refer to the “Creating an Unavailability Record” section in this topic.

- Update an availability record by selecting the record with **2**
- Delete an availability record by selecting the record with **4**
- Display an availability record by selecting the record with **5**
- Display the availability information in calendar format by pressing F16

Search fields are available for day, status and course and there is a locate field for date.

The system retrieves calendar information from the following sources:

- The course schedule file where classrooms are attached to a course
- The employer holidays file on the Infinium HR system that identifies public holidays
- The availability file that allows classrooms to be made unavailable on specified dates

Creating an Unavailability Record

You need to create unavailability records only for exceptions; for example, if a classroom is being refurbished or if an instructor is on vacation. You do not have to create unavailability records for the normal scheduled course dates for classrooms, instructors or equipment. The system's validation procedures automatically recognize when a classroom, instructor or piece of equipment has been scheduled for another class.

Follow the steps below to create an unavailability record:

1. From the Infinium TR main menu select *Calendar Functions.*

2. Select the function that is appropriate to your needs:

   Classroom Availability [CLASSAVAIL]
   Instructor Availability [INSTAVAIL]
   Equipment Availability [EQUIPAVAIL]

   The system displays the appropriate availability screen.

3. Type the classroom, instructor or equipment for which you are creating an unavailability record. Refer to Step 2 in the previous task for information about the fields on the screen.

4. Press Enter. The system displays the classroom availability in either list or calendar format, depending on the value you typed in the *Format* field in Step 3 above.

5. Press F6 to create an availability record. If you press F6 when the cursor is positioned on a particular date, that date automatically defaults on the next screen. The system displays a screen similar to the screen shown in Figure 5-6.

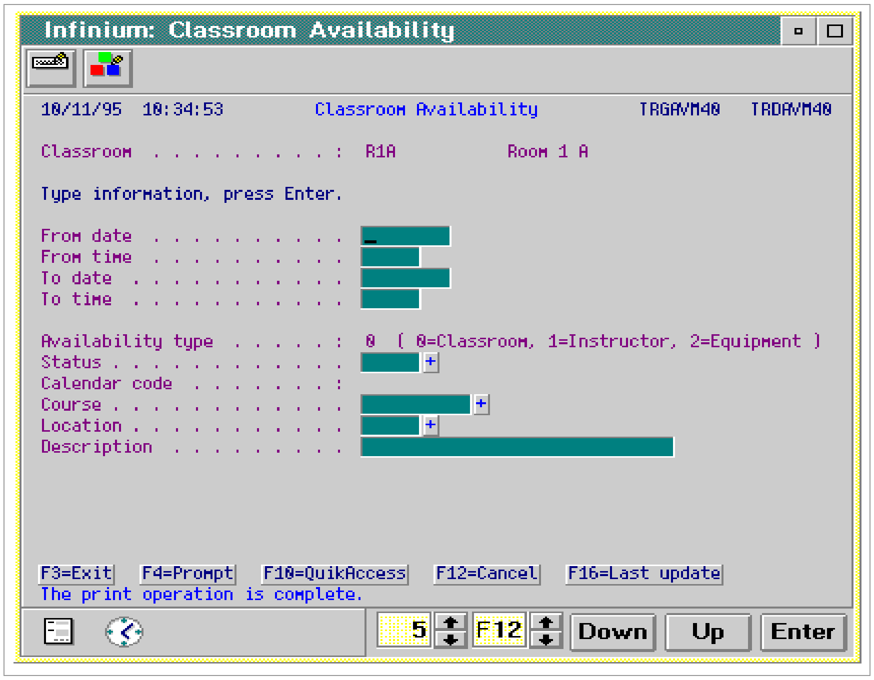


Figure 5-6: Classroom Availability screen – create unavailability record

Use this screen to create an unavailability record. You are required to type data in the *From date* and *Status* fields. You can press F16 to display a window showing the following record update information: time, date, user and workstation.

6 Use the following information to complete the fields on this screen.

From date and From time

Use these fields to type the date and time from which the classroom, instructor, or equipment will be unavailable. The *From time* field is optional.

To date and To time

Use these fields to type the date and time to which the classroom, instructor, or equipment will be unavailable. These fields are optional and if you leave the *To date* field blank, the system uses the value you type in the *From date* field.

Status

You define status values using the *Update Codes* function for code type **STS** (Status Code). When you create status code values, you must also provide a calendar code for each status. The system displays this one-character code value on the calendar as well as in the *Calendar code* field on this screen.

For example, you can create a status code of **HOL** to show unavailability because of a company holiday, with an accompanying calendar code of **H**; or you can create a status code of **REP** to show unavailability due to repairs, with a calendar code of **R**.

If you type a value in the *Status* field or press F4 to make a selection, the system supplies the accompanying code value in the *Calendar code* field. The system does not allow a blank value in this field to prevent the calendar from displaying blank dates that erroneously indicate availability.

7 Press Enter to validate the information you enter and then press F3 to create the record.

Scheduling Courses

Overview

When you create the course master record in the course catalog, you define its basic and fixed attributes, such as course type, description, and duration. The course master records do not contain any variable information; for example, the date the course will be held, the classroom in which it will be held, the number of available places, or who will teach the course.

You must define this variable information in the system by creating course schedule records. You create a course schedule record for each planned occurrence of the course. These records allow you to work with each occurrence of a course; for example, to enroll employees, to allocate equipment, or to verify attendance.

When the course is complete, the course schedule record becomes the history record for the course. You can use the course history record to view complete information about the course; for example, you can view all the employees who were trained in that course, or you can use course history as a means of identifying employees who have not received training in a course.

You can define the following information when you schedule a course:

- Start and end dates
- Start and end times
- Classroom
- Reserve entire period
- Location
- First, second and third choices of instructors
- Maximum and minimum number of places in the course
- Training hours
- Documentation required
- Course cancellation date
- Two user-defined fields
- Comments

Identifiers for course locations and code values for the **ROM** (Classroom) code type must exist before you can schedule courses. Instructor identifiers and values for the **DOC** (Documentation), **TC3** (Course Schedule User-Defined Field 1) and **TC4** (Course Schedule User-Defined Field 2) are optional, but you can require them at your site.

Scheduling a Course

Follow the steps below to schedule courses:

1. From the Infinium TR main menu select *Course Scheduling.*

2. Select *Update Course Schedule* [US]. The system displays a screen similar to the screen shown in Figure 5-7.

```
 3/12/00  12:35:04        Update Course Schedule         TRGEPM10   TRDEPM10
                                                                 Page 1 of 3
Type selections, press Enter.

Course ID  . . . . . . ACCOUNT    +
Include Completed? . . 0  (0=no, 1=yes)















F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Figure 5-7: Update Course Schedule screen 1

3. Type the identifier for the course for which you want to create a schedule. Or, press F4 to display a list of valid courses from which you can select.

4. Type **1** in the *Include completed?* field if you want to display all scheduled courses, both completed and not completed. Otherwise, type **0**.

5. Press Enter. The system displays a screen similar to the screen shown in Figure 5-8.

```
 3/12/00  12:35:09        Update Course Schedule         TRGEPM20   TRDEPM20
                                                                 Page 2 of 3
Course ID . . . . . . . . . . . :  ACCOUNT    100-Basic Accounting Practices

Type options, press Enter.
 2=Change  3=Copy  4=Delete  5=Display  6=Course Enrollments  7=Exercises/Tests
 8=Stages/Sessions 9=Allocate Equip 10=Reschedule 11=Calendar 12=Cancellations
       Start    Class
Opt    Date     Room   Time   Location Status   Max  Min  Cnl.  Enroll. Avail.
 __  26/03/2000 ALD2A   9:15  WHQ    Enrolling   30    0    0        1     29
 __  25/03/2000 ALD2A   9:15  WHQ    Re_Sched    30    0    0        0     29
 __  16/03/2000 ALD2A   9:15  WHQ    Re_Sched    30    0    0        0     30
 __  21/02/2000 PCTR          WHQ    Attended    30    0    0        2     28










                                                                      Bottom
F3=Exit  F6=Create  F10=QuikAccess  F12=Cancel  F13=Sessions  F20=Cancellations
```

Figure 5-8: Update Course Schedule screen 2

You use this screen to do the following:

- Create a new course schedule by pressing F6
- Update course schedule information by selecting the course with **2**
- Copy course schedule information from an existing schedule to a new schedule by using option **3**

For more information about copying course schedule information, you can refer to the “Using Existing Course Information to Create a New Record” section in this topic.

- Delete a course schedule record by selecting the course with **4**
- Display course schedule information by selecting the course with **5**
- Allocate equipment for a course by selecting the course with **9**
- Reschedule a course by selecting the course with **10**
- Display cancellations by selecting the course with **12**
- Display cancellations for all start dates associated with the selected course by pressing F20.

If you select a course with **12** or if you press F20, the system displays the Display Course Cancellations screen. You can use this screen to delete or re-enroll cancellations:

- To delete the record of a cancelled employee, select the employee with **4**

- To re-enroll a previously cancelled employee, select the employee with **6**

You access other functions from this screen as follows:

- *Update Enrollments* function by selecting the course with **6**
- *Update Exercises/Tests* function by selecting the course with **7**
- *Update Sessions/Stages* function by selecting the course with **8** or pressing F13
- *Classroom Availability* function by selecting the course with **11**

6 After you press F6 to create a new course schedule, the system displays a screen similar to the screen shown in Figure 5-9.

```
 8/29/02    17:15:22       Create Scheduled Course       TRGEPM30   TRDEPM30
                                                                Page 3 of 3

Course ID . . . . . . . . . . . :  ACCOUNT    100-Basic Accounting Practices

Type options, press Enter.

Start Date  . . . . . . . . . .  ________     End Date . . . . . . . .  ________
Start Time  . . . . . . . . . .  _____        End Time . . . . . . . .  _____
Classroom Code  . . . . . . . .  _____ +      Reserve Entire Period? .  1 (0/1)
Location ID . . . . . . . . . .  JON-1 +
Maximum Places  . . . . . . . .  ____         Instructor 1 . . . . . .  _____ +
Minimum Places  . . . . . . . .  ____         Instructor 2 . . . . . .  _____ +
Training Hours  . . . . . . . .  ___.00       Instructor 3 . . . . . .  _____ +
Documentation Code  . . . . . .  _____ +      Attendance Indicator .    1
Cancelled Date  . . . . . . . .  ________
Usr Defn 3 Code . . . . . . . .  _____ +
Usr Defn 4 Code . . . . . . . .  _____ +
Overall Assessment  . . . . . .               Number of Assessments  .     0
Comments  . . . . . . . . . . .  _____________________________________________
____

F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel   F16=Calendar
```

Figure 5-9: Create Scheduled Course screen

You use this screen to define the details of a scheduled course. You are required to type data in the following fields: *Start Date, End Date, Classroom Code, Location ID* and *Maximum Places*.

When you use the *Update Enrollments* function, the system uses your entries in the *Maximum Places* and *Minimum Places* fields to determine available space.

You can create multiple scheduled courses for the same date and classroom as long as they have different starting times.

The system writes the number of training hours to the employee's training record after the employee completes the course. This allows tracking of training hours for employees in training programs. When you create the course, the system defaults the hours from the corresponding field on the course master record.

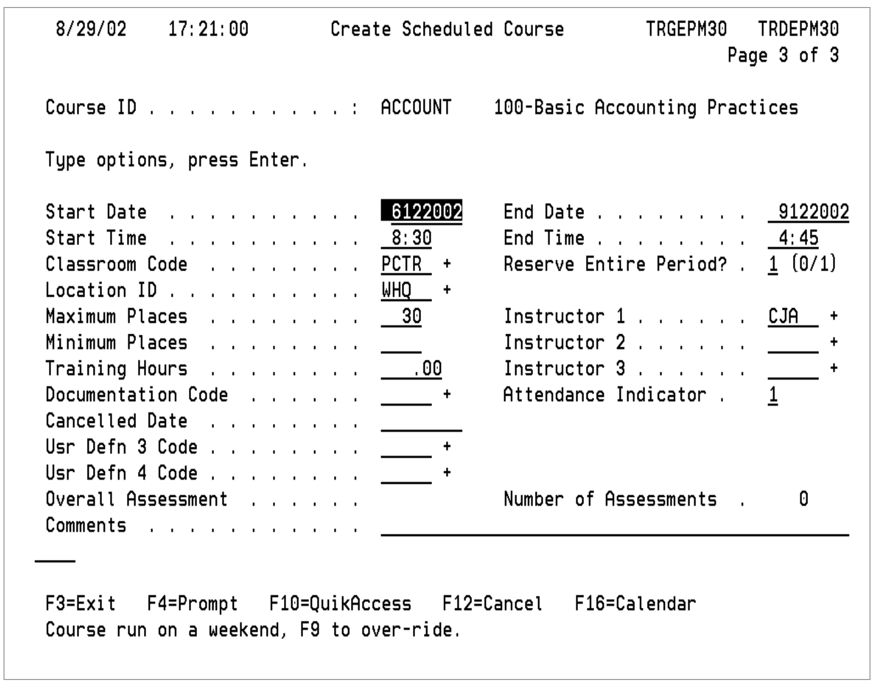
You can update only the *Overall Assessment* and *Number of Assessments* fields for completed courses.

7 Make the appropriate entries using the following information to complete the fields on this screen.

End Date

If you leave the *End Date* field blank, the system assumes it is a one-day course and uses the value in the *Start Date* field.

If the dates in the *Start Date* and *End Date* fields include a weekend, the system displays a warning message at the bottom of the screen, as shown in Figure 5-10.



```
 8/29/02    17:21:00        Create Scheduled Course        TRGEPM30   TRDEPM30
                                                                   Page 3 of 3

Course ID . . . . . . . . . . :  ACCOUNT    100-Basic Accounting Practices

Type options, press Enter.

Start Date  . . . . . . . . . .  6122002     End Date . . . . . . . .   9122002
Start Time  . . . . . . . . . .   8:30       End Time . . . . . . . .    4:45
Classroom Code  . . . . . . . .  PCTR  +     Reserve Entire Period? .  1 (0/1)
Location ID . . . . . . . . . .  WHQ   +
Maximum Places  . . . . . . . .    30        Instructor 1 . . . . . .  CJA    +
Minimum Places  . . . . . . . .              Instructor 2 . . . . . .         +
Training Hours  . . . . . . . .     .00      Instructor 3 . . . . . .         +
Documentation Code  . . . . . .        +     Attendance Indicator .    1
Cancelled Date  . . . . . . . .
Usr Defn 3 Code . . . . . . . .        +
Usr Defn 4 Code . . . . . . . .        +
Overall Assessment  . . . . . .              Number of Assessments  .      0
Comments  . . . . . . . . . . .

F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel   F16=Calendar
Course run on a weekend, F9 to over-ride.
```

Figure 5-10: Create Scheduled Course screen – weekend warning message

You can press F9 to override this warning and continue to schedule the course with a weekend date.

Start Time and End Time

When you type the time in the *Start Time* and *End Time* fields, use the 24-hour clock format. The system automatically inserts the colon.

Classroom Code

Use this field to enter the identifier for the classroom where this scheduled course will be held. The system does not allow you to enter a classroom that is already being used on that date and at that time. You can use the *Classroom Availability* function to obtain available dates and times.

Maximum Places

Use this field to enter the maximum number of seats allowed for the specified classroom or location.

You can associate maximum places with the classroom code if you use code type *ROM* on the Update Codes screen and you enter a value in the *Maximum Places* field. You can also associate maximum places with the location code if you enter a value in the *Default Maximum Places* field on the Create Location screen.

You can manually enter a value in the *Maximum Places* field, or the system can default a value from the classroom code or the location code when you press Enter or F4 in this field. The value for the classroom always has default priority over the value for the course location. You can change the default value in this field.

Reserve entire period

Use this field to indicate whether you are reserving the time and location for this class for the duration of the class or only for the portions of the time period when the class will be in session.

Instructor 1, 2 and 3

Use these fields to enter the identifiers for the instructors who will teach this scheduled course. You can enter identifiers only for instructors who are authorized to teach the course. You authorize instructors to teach a course using the *Update Instructor Assignments* function.

Attendance Indicator

Use this field to specify the default value for the attendance indicator for course enrollees whose status is confirmed or provisional when you update the attendance details for the course.

Valid values are:

1	Attended
0	Did not attend

8 Press F3 to exit and save.

Use Existing Course Information to Create A New Record

After you select an existing scheduled course with **3** on the Update Course Schedule screen and press Enter, the system displays the Copy Scheduled Course window, similar to the window shown in Figure 5-11.

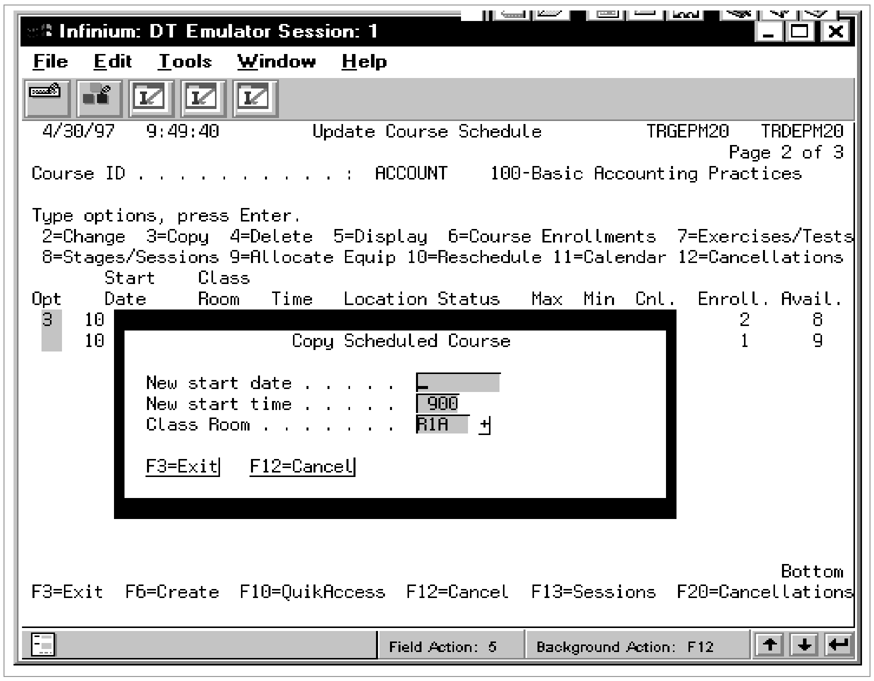


Figure 5-11: Copy Scheduled Course window

Use this window to specify a new start date and to change the classroom if necessary.

When you enroll employees in courses scheduled for the same date and classroom, you must ensure that you select the course with the correct starting time.

1 Complete this window by entering the date and time when this new course will start. The system defaults the original classroom and time into the *Class Room* and *Start time* fields. You can change this if necessary.

2 Press Enter. The system ensures that an instructor is both authorized and available to teach this course. If one or more of the instructors is unavailable on the new start date, the system displays an error message.

3. If you receive the unavailable instructors message, you can either press Enter to copy the course with the unavailable instructors removed or press F12 to cancel.

Allocating Equipment

Overview

You can reserve multiple pieces of equipment for each course or course session. The system checks the allocation records for duplicate requests. The system treats each equipment code as a unique resource. You cannot allocate the same piece of equipment to more than one course or course session scheduled into the same time frame.

You must assign unique code values to each piece of equipment when you first set up your training equipment items even if you do not care which one you actually use. For example, if you have three overhead projectors, set them up with codes such as OHPJ1, OHPJ2, and OHPJ3. If all three are allocated to courses on the same date and time, the system does not allow you to allocate any of the three overhead projectors to another scheduled course.

Course identifiers and code values for the **ROM** (Classroom) and **EQP** (Equipment) code types must exist before you can allocate equipment for course use. The **SES** code type (Session) is optional, but you can require it at your site.

Allocating Equipment for a Scheduled Course

Follow the steps below to allocate equipment for a scheduled course:

1. From the Infinium TR main menu select *Course Scheduling*.
2. Select *Update Course Schedule* [US]. The system displays the Update Course Schedule screen.
3. Type the identifier for the course to which you want to allocate equipment. Or press F4 to display a list of valid course identifiers and select from the displayed list.
4. Press Enter. The system displays the Update Course Schedule screen listing all occurrences of the course.

5 Type **9** in the *Opt* field next to the date, classroom, time and location for the course to which you want to allocate equipment.

6 Press Enter. The system displays a screen similar to the screen shown in Figure 5-12.

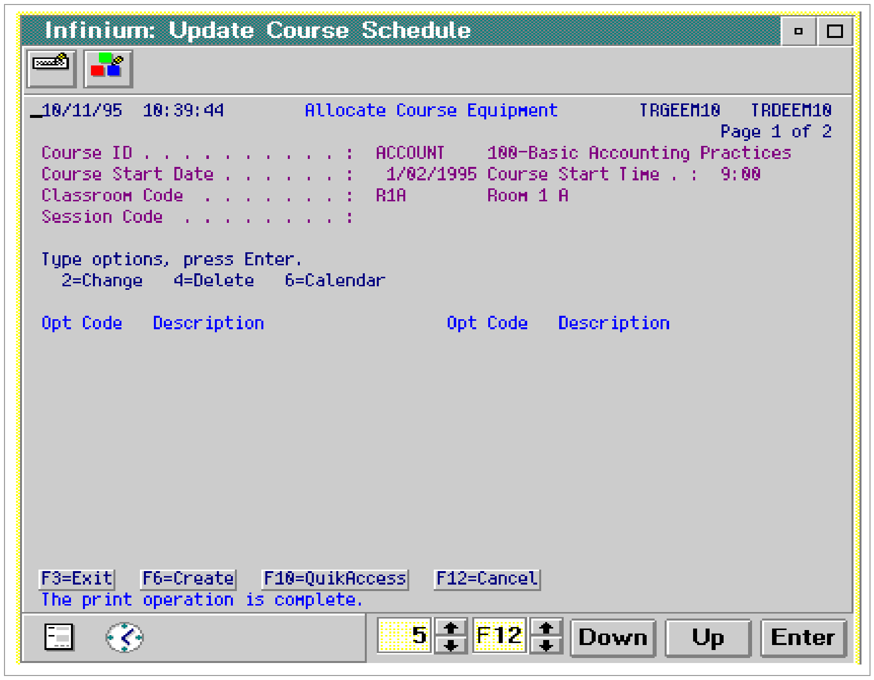


Figure 5-12: Allocate Course Equipment screen 1

Use this screen to do the following:

- Create a new equipment allocation record by pressing F6
- Update the start and end dates and times by selecting the equipment record with **2**
- Delete the course equipment allocation record by selecting it with **4**
- Work with the equipment availability calendar by selecting it with **6**

7 Press F6 to create a new equipment allocation record for the course. The system displays a screen similar to the screen shown in Figure 5-13.

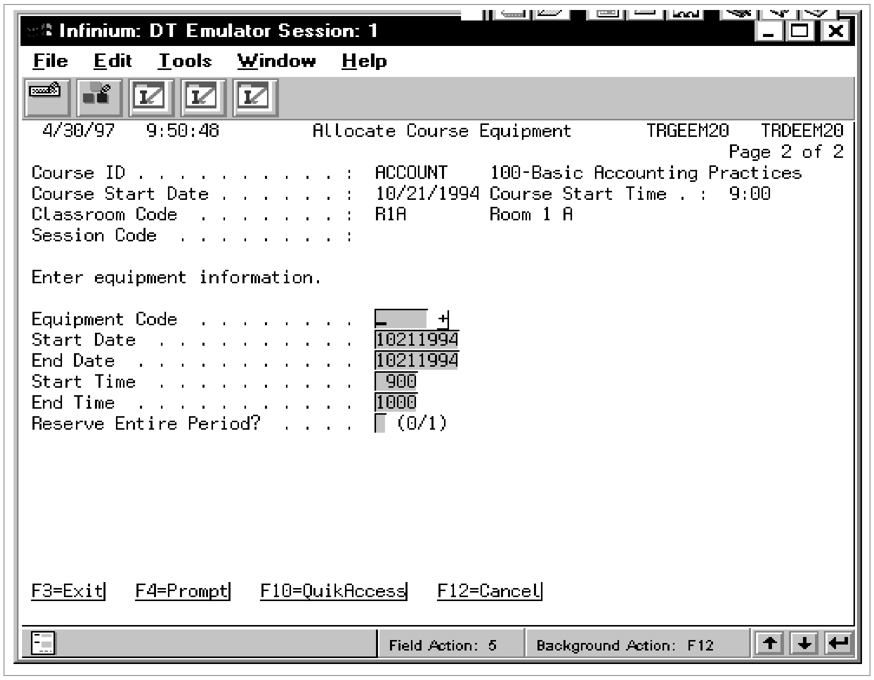


Figure 5-13: Allocate Course Equipment screen 2

Use this screen to allocate the equipment necessary for this course. This screen shows the *Start Date* and *End Date* for the specified course. The system defaults the course dates into the *Start Date* and *End Date* fields. You can overwrite either or both default dates with another date.

To specify that you need this equipment for a specific period, enter the start and end times. If you need the equipment for the entire period, type **1** in the *Reserve entire period?* Field.

If the piece of equipment you select was assigned to another course, the system displays a message at the bottom of the screen that tells you the equipment is already reserved. Select another piece of equipment or use the *Update Codes* function to create another code value for the same type of equipment.

8 Use the information below to fill in the fields on this screen.

Equipment Code

Type the identifier for the piece of equipment you want for the course. Or, press F4 to display a list of valid identifiers and select from the displayed list.

Start Time

Type the earliest time when you need the equipment.

End Time

Type the latest time when you need the equipment.

Reserve Entire period?

Use this field to specify whether you need the equipment for the duration of the course. Valid values are:

1	Yes
0	No

9 Press F3 to exit and save.

10 Repeat Steps 7 through 9 for each piece of equipment you want reserved for this course section.

11 When you have finished entering equipment information, press F3 two times to return to the Infinium TR desktop or main menu.

Allocating Equipment for a Specific Course Session

Follow the steps below to reserve equipment for a specific course session:

1 From the Infinium TR main menu select *Course Scheduling*.

2 Select *Update Course Schedule* [US]. The system displays the Update Course Schedule screen.

3 Type the identifier for the course to which you want to allocate equipment. Or press F4 to display a list of valid course identifiers and select from the displayed list.

4 Press Enter. The system displays the Update Course Schedule screen listing all occurrences of the course.

5 Type **8** in the *Opt* field next to the date, classroom, time and location for the course to which you want to allocate equipment. The system displays the sessions and stages for the specified course.

6 Press Enter. The system displays a screen similar to the screen shown in Figure 5-14.

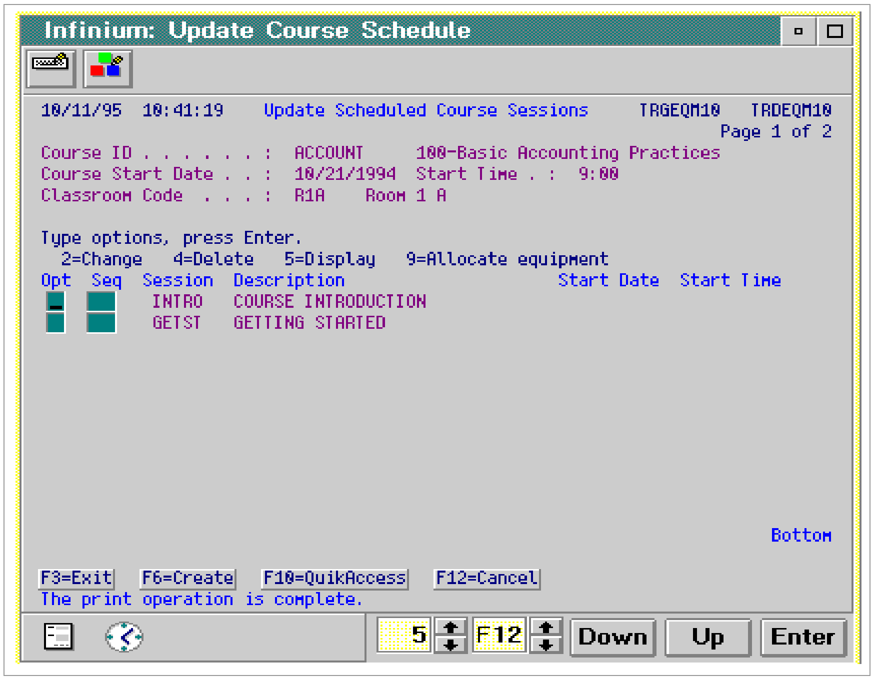


Figure 5-14: Update Scheduled Course Sessions screen 1

This screen lists the sessions for the specified course occurrence.

7 Select the session for which you want to reserve equipment by typing **9** in the *Opt* field next to the session information. Then follow steps 6 through 9 in the previous task to reserve equipment for the specified session.

Chapter 6 Creating Training Requests

6

This chapter provides the tasks you use to record employee training requirements and employee requests for training. You can manually enter or automatically create training request information.

The chapter consists of the following topics:

Overview of Training Requests

Training requests is a generic term used in Infinium TR to include not only requests for training but also employees' training needs and training requirements.

The four main stages in the training cycle are:

- Recording training requests
- Enrolling employees in courses
- Verifying course attendance
- Recording training history

Recording training requests is the first stage in the training cycle. The system does not, however, require that you use the training request stage. This stage is optional because not all types of training involve a request for training. You can enroll an employee in a course or create training history without having a training request.

The training requests functions are very useful because they provide a separate database of your employees' training needs, requirements and requests.

You can use these for training analysis, course planning, and as the basis for selective course enrollments. Training request records also provide a place to hold the employee training requirements the system automatically created.

Training request records are created in the following ways.

- Automatically, as part of the Infinium HR entering new employee process
- Automatically, as part of a Infinium HR personnel action that results in an employee change of position
- Manually, using the *Update Employee Training Requests* function
- In volume, in batch, using the *Mass Training Requests - Create* and *Mass Refresher Requests - Create* functions
- Manually, using the *Personnel Actions Update Performance Reviews* function.

Automatic Training Request Generation from Infinium HR

You can automatically generate training requests from the *Enter New Hire*, *Enter Personnel Actions*, and *Mass Update Personnel Actions* functions. The integration of the Infinium HR and Infinium TR systems allows this capability. The *Training Group* field on the position record in Infinium HR controls this automatic generation of training requests.

You can set up training group codes in Infinium TR and define each code to represent a particular set of required training courses. For more information on setting up training groups, you can refer to the following information:

- In the “Setting up Master Files” chapter, see the “Assigning Code Values to Code Types” topic
- In the “Managing the Course Catalog” chapter, see the “Assigning Courses to Training Groups” topic

By entering a training group code in the position record in Infinium HR, you link the position with a set of required training courses. If the position has no required training courses, leave the *Training Group* field blank on the position record.

You can define the core training courses not related to positions but required for all employees. Define these in a special training group called *CORE. This acts as a second, general training group for all employees and eliminates the need to define your core courses in every training group.

During the *Enter New Hire* process, if the position for which the person is being hired has a training group code, the system automatically creates training request records for the employee for each course in that training group.

The system also creates training requests for the employee for any training courses set up under the special training group *CORE. The system creates these training requests interactively. The system does not produce a report of these training requests. You can distinguish training request records created this way by the value ***NEW** as the training reason code.

You can promote, demote, transfer, or re-hire an employee to a new position using the *Enter Personnel Actions* or *Mass Update Personnel Actions* functions.

If the training group code for the new position differs from the employee’s previous position, the system automatically creates new training requests required for each course in the new training group. The system creates these training requests interactively during the update stage in *Enter Personnel Actions*. The system does not produce a report of these training requests.

You can distinguish training request records created this way by the value ***NEW** as the training reason code.

When you create a course and enter course master information, you use the *Required by Days* field to specify the number of days after an employee is hired that he or she should take the course. When the system automatically creates training requests during the *Enter New Hire* process, it uses this number of days to calculate the *Required by Date* field on the training request record. When you use the *Update Training Requests* function, the system automatically alerts you to any overdue employee training.

You can also use the *Frequency* field when you create or update a course to indicate the number of months after the course is taken that the employee should take the follow-up or refresher course.

Tasks to Perform After Creating Training Requests

After you have created training requests, you can use the *Employee Enrollments* functions to create course enrollments and to print sign-in sheets for those courses. For more information, refer to the “Creating Course Enrollments” chapter.

To re-enroll people who may have been enrolled but did not attend the course, you must first indicate that the class is complete by pressing F16 on the Update Course Attendance screen. For more information about completing a course record, refer to the “Working with Course Attendance Records” chapter.

Objectives

After you complete this chapter, you should be familiar with how to automatically generate training requests from Infinium HR. In Infinium TR you can manually enter and automatically create training requests for training courses and for refresher courses.

Manually Creating Training Course Requests

Overview

You manually enter training request information for employees who request training and for employees whose managers have identified specific training needs.

Before you can manually create training requests, the following must exist:

- In Infinium HR: Employers, employees, position codes, and job codes
- In Infinium TR: Course identifiers and values for **TRS** (Training Reason Code) and **TAC** (Training Actions) code types

Values are optional for **TC5** (Request User-Defined Field) code type, but this information may be required at your site.

Creating Training Requests

Follow the steps below to manually create employee training requests:

1. From the Infinium TR main menu select *Training Requests*.
2. Select *Update Training Requests* [UN]. The system displays the Update Employee Training Requests prompt screen.
3. After you type a valid *Employer ID* and *Employee ID*, press Enter. The system displays a screen similar to the screen shown in Figure 6-1.

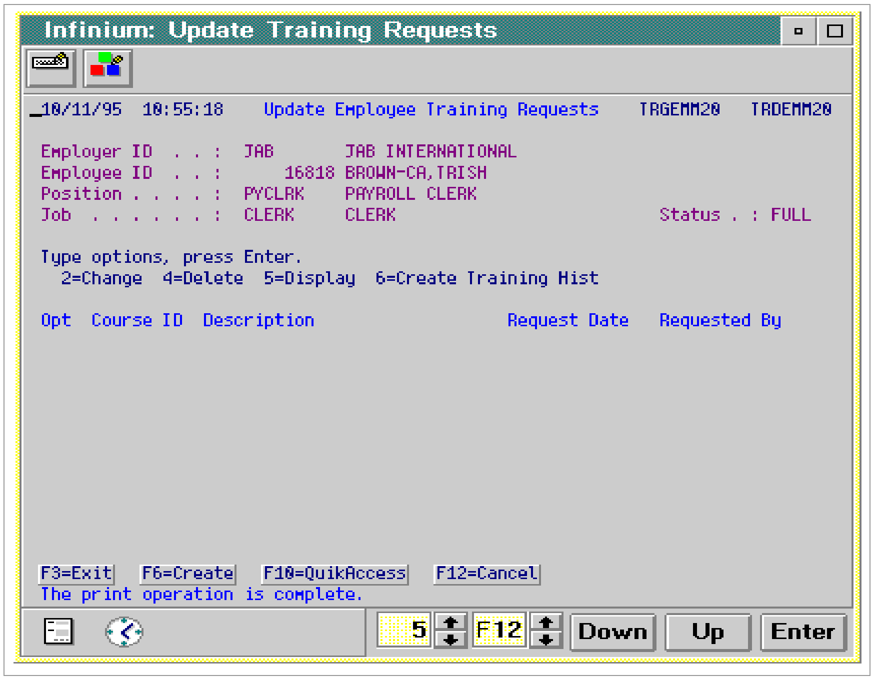


Figure 6-1: Update Employee Training Requests screen

Use this screen to do the following:

- Create a new training request record by pressing F6
- Update a training request record by selecting it with **2**
- Delete a training request record by selecting it with **4**
- Display a training request record by selecting it with **5**
- Create a training history record for the employee based on the selected training request by selecting that record with **6**

The system either flashes or displays **OVERDUE** in red next to the employee record when course enrollment and attendance are overdue.

The system automatically deletes training requests when employee training history is created from confirmed course attendance.

You cannot create a training request for a terminated employee.

4 Press F6 to create a new training request record. The system displays a screen similar to the screen shown in Figure 6-2.

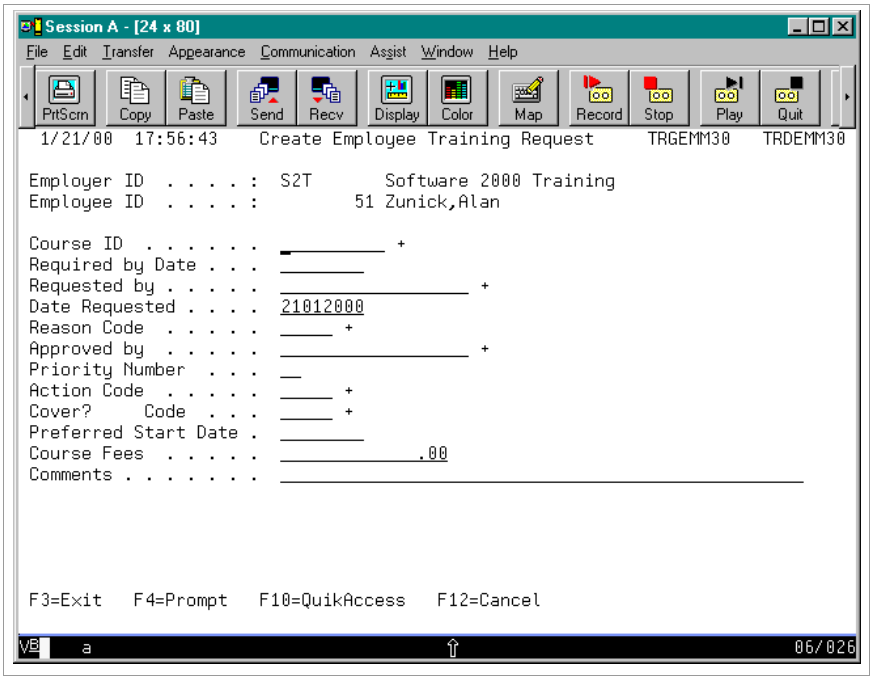


Figure 6-2: Create Employee Training Request screen

Use this screen to create a new training request record for an employee. The following fields are required: *Course*, *Required by Date*, *Requested by*, *Date Requested* and *Reason Code*.

When you use the *Update Enrollments* or the *Mass Enrollment* functions and enroll an employee in a course, the system highlights the training request record the Update Employee Training Requests screen. This tells you the employee is enrolled in the course.

5 Type the information for the new training request record.

6 Press Enter to validate the information.

7 Press F3 to exit and save.

Creating Mass Training Course Requests

Overview

The *Mass Training Request - Create* function allows you to create training requests and requirements for groups of employees. You enter the basic information for the training request record and select the group of employees for whom the system will create training requests. The system processes this job in batch, creating all the appropriate training request records and producing a supporting report.

The *Mass Training Request - Trial* function produces only a report and does not actually create the training requests. This allows you to preview the results of the *Mass Training Request - Create* function. You should use the *Mass Training Request-Trial* function before you use the *Mass Training Request* function.

Example 1

When you introduce a new training program that requires all employees in the company or division to receive the new training, you create new course master records for the training courses. Then you use the *Mass Training Requests - Create* function to create all the necessary training request records.

You could then use these training request records to plan the course schedules and streamline the enrollment process. Once the training program is underway, you use the training requests database to monitor and identify any employees who are still untrained.

Example 2

When you add a new training course to one or more training groups, the system automatically creates a training request for all new hires and employees promoted, demoted, and so forth, to the affected positions. However, the system does not create training requests for all existing employees. The *Mass Training Requests - Create* function allows you to select all employees in a particular training group and create training requests for them for the new course in the training group.

Before you can automatically create training requests, the following must exist:

- In Infinium HR: Identifiers for employers and employees and codes for positions, jobs, and levels
- In Infinium TR: Course identifiers and values for the **TRS** (Training Reason Code), **TGP** (Training Group), and **TAC** (Training Actions) code types

Values are optional for **TC5** (Request User-Defined Field) code type, but this information may be required at your site.

Running the Trial Version of Mass Training Requests

Complete the following steps to automatically generate the Trial Mass Create Training Requests report:

1. From the Infinium TR main menu select *Training Requests*.

2. Select *Mass Training Requests - Trial* [MNT]. The system displays a screen similar to the screen shown in Figure 6-3.

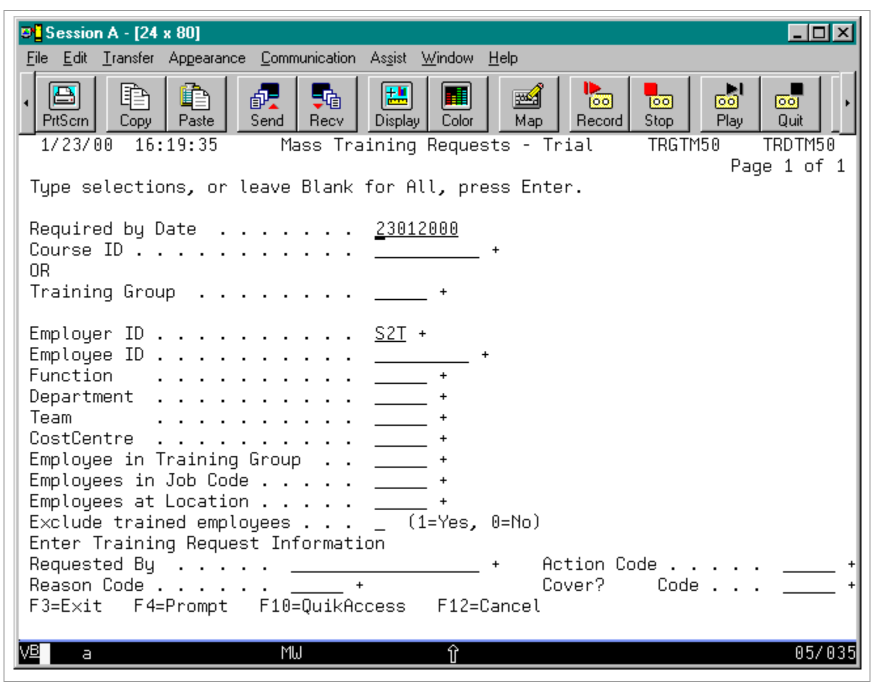


Figure 6-3: Mass Training Requests - Trial screen

You use this screen to define the parameters for the trial creation of mass training requests. The following fields are required: *Required by Date,* *Requested By* and *Reason Code.* You must type data in either the *Course ID* or *Training Group* field. You must also specify whether or not you want to exclude trained employees.

The system uses the fields in the middle section of this screen, beginning with *Employer ID*, to select the group of employees. The system uses the values you enter in the fields in the top and lower sections of this screen to fill the corresponding fields on the training request record.

You can mass create training requests for all members of any of the following groups:

- *Employer ID*
- Employee ID
- Level 1, 2, 3, 4
- Employees in Training Group
- Employees in Job Code
- Employees at Location

3 Make the appropriate entries on this screen.

4 Press Enter to submit the job that produces the trial training requests report.

Running the Create Version of Mass Training Requests

Complete the following steps to create training requests:

1 After you review the trial training requests and are confident they are correct, select *Mass Training Requests - Create* [MN].

2 Complete the prompt screen as described in the section following Figure 6-3.

3 Press Enter. The system creates the appropriate training request records.

Creating Mass Training Refresher Requests

Overview

You can mass generate training requests for employee refresher training. Refresher training consists of employee training in the same course at regular intervals.

You must set up courses that require refresher training with a number of months value in the *Frequency* field on the course master record. The *Mass Refresher Requests - Trial* and *Mass Refresher Requests - Create* functions process only those employees who have been trained in the course. They must have at least one training history record for the course.

The system calculates the interval between the last date an employee received training in the course and the effective date that you enter when you run these functions. If this interval exceeds the number of months in the *Frequency* field on the course master, the system creates a training request.

Before you run the *Mass Refresher Requests - Create* function, which actually creates any necessary refresher training request records, you should use *Mass Refresher Requests - Trial*, which generates a report listing employees who require the refresher training without actually creating the training requests. This allows you to preview the results of the create function.

Before you can automatically create training requests for refresher courses, the following must exist:

- In Infinium HR: Identifiers for employers and employees and codes for positions, jobs, and levels
- In Infinium TR: Course identifiers and values for the **TRS** (Training Reason Code), **TGP** (Training Group), and **TAC** (Training Actions) code types

Values are optional for **TC5** (Request User-Defined Field) code type, but this information may be required at your site.

Running the Trial Version of Mass Refresher Requests

Complete the following steps to run the trial refresher training request report:

1 From the Infinium TR main menu select *Training Requests*.

2 Select *Mass Refresher Requests - Trial* [MNRT]. The system displays a screen similar to the screen shown in Figure 6-4.

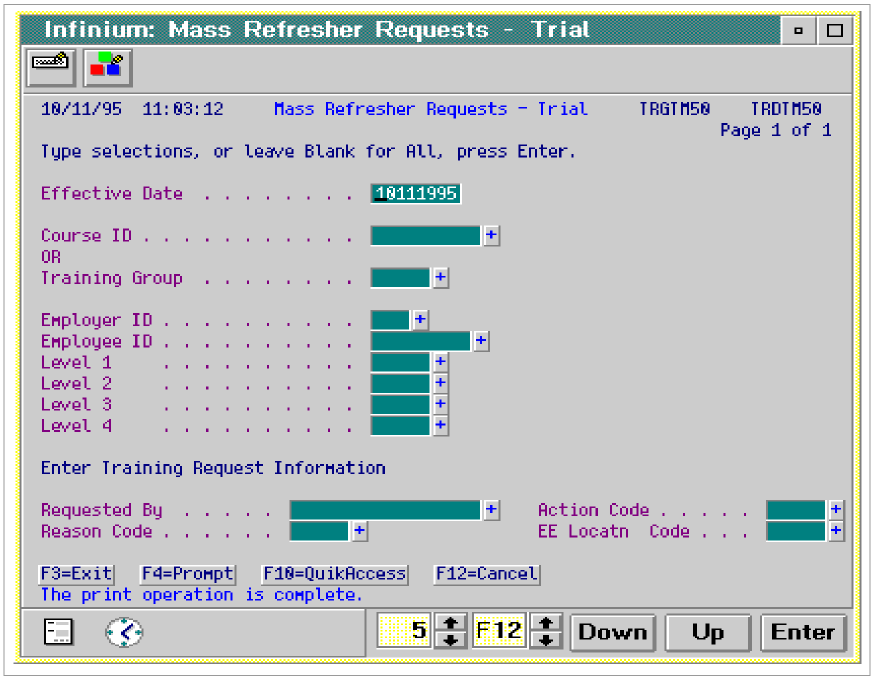


Figure 6-4: Mass Refresher Requests - Trial screen

Use this screen to define the parameters for the trial creation of mass refresher training requests. The following fields are required: *Effective Date, Requested By* and *Reason Code.*

You can generate mass refresher training requests for all members of any of the following groups by leaving the appropriate field(s) blank:

- *Employer ID*
- Employee ID
- Level 1, 2, 3, 4

The system calculates the interval between the last date an employee received training in the course and the date you type in the *Effective Date* field. If this interval exceeds the number of months in the *Frequency* field on the course master, the system generates a training request.

The system checks training request records for those who require refresher training. If a training request record already exists for an employee who requires a refresher, the system does not create a duplicate when you use the *Mass Refresher Requests - Create* function.

3 Make the appropriate entries on this screen.

4 Press Enter to submit the job that produces the trial refresher training requests report.

Running the Create Version of Mass Refresher Requests

Complete the following steps to create training requests for refresher courses:

1. After you review the trial refresher training requests and are confident they are correct, select *Mass Refresher Requests - Create* [MNR].
2. Complete your entries on the prompt screen as described in the section following Figure 6-4.
3. Press Enter. The system creates the appropriate refresher training request records.

Notes

Chapter 7 Creating Course Enrollments

7

This chapter provides the tasks you perform to enroll employees in courses, to update course enrollments, and to print sign-in sheets for these courses based on the employees you enroll.

The chapter consists of the following topics:

Overview of Course Enrollments

Course enrollments are records you create to identify the employees who are due to attend specific scheduled courses. Course enrollments are different from training requests in that they specify the actual course date when employees are scheduled to attend.

The enrolling employee process consists of creating a separate enrollment record for each enrolled employee. This is the second stage in the training cycle.

Methods for Creating Course Enrollments

The enrollment process provides flexibility and data entry efficiency. You can use any of the following methods to create course enrollments:

- Manually type in information. Use the mass entry screen to type in multiple employees. This method is suitable when you are working from a paper list of employee names or numbers.
- Select multiple training requests from the training requests database. With this method you select the training requests and the system automatically creates the enrollment records.
- Mass select employees for training from the employee database. With this method you select a group of employees, such as everyone in a particular department, and the system automatically creates the enrollment records. The system does not need training requests in this method. You can also select employees who were enrolled in a prior course but did not attend.
- Enroll employees automatically. You can request the system to automatically enroll any employees with training requests into available places in scheduled courses. You can select the employees to be considered. For example, you can select all employees in a company or a particular department. A trial option allows you preview the results before you proceed.
- Copy enrollments from one course to another. You can copy enrollments by specifying the course, starting date, classroom and starting time for new course enrollments.

You use the *Update Enrollments* function in *Employee Enrollments* to manually enter information, select multiple training requests from the training requests database, and to mass select employees for training from the employee database. You use the *Mass Enrollments Trial* and the *Mass Enrollment* functions to enroll employees automatically. To print sign-in sheets for a course or courses, you use the *Print Course Sign-in Sheets* function.

Tasks to Perform After Enrolling Employees

After you enroll employees in courses, you can work with the course enrollments and update them as required prior to the courses actually being held. For example, you can use the code you type in the *Course Enrollment Actions* field to identify the status of the enrollment, whether you have sent course notification to the employee, or whether you have received confirmation. You can also delete the enrollment records of any employees who are unable to attend the course.

The next stage in the training cycle is to confirm course attendance after the course has been completed. The system uses course enrollment records as the basis for confirming attendance. You also update training history records and create training cost records. For more information about these tasks, you can refer to the parts on “Working with Course Attendance Records,” “Creating Training History,” and “Managing Training Costs.”

Objectives

After completing this chapter you should be familiar with how to use the *Employee Enrollments* functions to generate enrollments for the specified course, transfer multiple selected training requests directly into the enrollment record, and print course sign-in sheets.

Creating and Generating Course Enrollments Manually

Overview

In addition to the employee's number and/or name, you can identify a training action code value as well as a user-defined code value. You can specify whether the employees' enrollment in the course is confirmed, provisional or they are on a waiting list for the course. The system automatically calculates the number of employees enrolled in the course, the number on the waiting list, and the remaining openings.

The system considers only employees whose status is confirmed or provisional as properly enrolled in a course. The system does not include employees on the waiting list in the total of enrolled. You can, however, view the employees on the waiting list as well as those that are enrolled.

You can select employees from a previous course they were unable to attend. You simply specify a course start date and classroom after you press F17 to update course attendance. The system displays all active employees who match your selection criteria and you can re-enroll them in the course.

You can reschedule an employee for the same course but for a different scheduled course date. The system then removes the original enrollment record.

Identifiers for employers and employees must exist in Infinium HR and identifiers for courses and values for the **TRS** (Training Reason Code) and **TAC** (Training Actions) code types must exist in Infinium TR.

Values for code types **TCT** (Requests - User Defined) are optional, but you can require this information at your site.

Creating Enrollments Manually

Complete the following steps to manually create enrollments:

1 From the Infinium TR main menu select *Employee Enrollments*.

2 Select *Update Enrollments* [UE]. The system displays the Update Course Enrollments screen.

3 Complete the prompt screen using the following field information.

Course ID

Type the course identifier in this field or press F4 to select a valid course identifier.

Course Start Date, Classroom and Start time

Type the appropriate values in these fields. If you do not know the start date for a course or its classroom and start time, use F4 to prompt on the *Course Start Date* field and select from the list of scheduled courses. When you select a scheduled course from the list, the system automatically also fills in the classroom code and the start time.

4 Press Enter when all the entries are correct. The system displays a screen similar to the screen shown in Figure 7-1.

```
 3/10/00  10:37:26        Update Course Enrollments        TRGEXM20   TRDEXM20
                                                                Page 2 of 3
Course ID . . . . . . . . . . . :  ACCOUNT    100-Basic Accounting Practices
Course Start Date . . . . . . . :  26/03/2000 Start Time  9:15  Duration   5.00 D
Classroom Code  . . . . . . . . :  ALD2A ALDERSHOT OAK ROOM
Maximum Places  . . . :  0030  Available Places  :  0028  No. Enrolled  :  0002
Minimum Places  . . . :  0000  Waiting List  . . :  0001  Cancellations :  0000

Type options, press Enter.
  2=Change 4=Delete 5=Display 6=Requests 8=Status 9=Cancellation 10=Reschedule
Opt  Name               Er   Employee  Enroll Date  Status       Action  Cancl
 _   Browne,Fiona       S2T        34  16/02/2000  C Confirmed              1
 _   Falconer,Dennis    S2T        94   6/03/2000  P Provisional            0
 _   Douglas, Andrew                   21/02/2000  W Waiting                0




                                                                      Bottom
F3=Exit  F6=Create  F10=QA  F12=Cancel  F16=Training Requests   F17=Attendance
```

Figure 7-1: Update Course Enrollments screen 2

This screen lists any persons already enrolled in the course. You use this screen to do the following:

- Create a new enrollment record by pressing F6
- Update a course enrollment record by selecting it with **2**

- Delete a course enrollment record by selecting it with **4**
- Display a course enrollment record by selecting it with **5**
- Update a training request by selecting an enrollment record with **6**
- Display enrollment status by selecting training requests with **8**
- Enter a cancellation by selecting training requests with **9**
- Reschedule an enrollment by selecting an employee with **10**
- Create enrollments from training requests by pressing F16
- Update course attendance and thereby create training history by pressing F17

This allows faster processing of ad hoc courses; you can accomplish mass enrollment, mass attendance and training history from one function.

You can also access course enrollments by selecting a scheduled course with **6** from the list of scheduled courses the system displays on the Update Course Schedule screen in the *Update Course Schedule* function.

5 Press F6 to create a new enrollment record. The system displays a screen similar to the screen shown in Figure 7-2.

```
 9/17/02  14:31:12        Create Course Enrollments      TRGEXM35   TRDEXM35

Course ID . . . . . . . :  ACCOUNT    100-Basic Accounting Practices
Course Start Date . . :  10/10/2002 Classroom Code  . . :  ALD1A  Time : 14:30
Date Enrolled . . . . .  17092002   Enrolled By . . . . .  Application Manage +
Action Code . . . . . .  _____ +    Action Date . . . . .  ________
EE Notifid  . . . . . .  _____ +
Comments  . . . . . . .  __________________________________________________
                                              Status   External
Employer  Employee    Name                    (C/P/W)  Employer
  S2T +   _________ + __________________ +  C        _____ +
  S2T +   _________ + __________________ +  C        _____ +
  S2T +   _________ + __________________ +  C        _____ +
  S2T +   _________ + __________________ +  C        _____ +
  S2T +   _________ + __________________ +  C        _____ +
  S2T +   _________ + __________________ +  C        _____ +
  S2T +   _________ + __________________ +  C        _____ +
  S2T +   _________ + __________________ +  C        _____ +
  S2T +   _________ + __________________ +  C        _____ +
  S2T +   _________ + __________________ +  C        _____ +
  S2T +   _________ + __________________ +  C        _____ +
                                                                    More...
F3=Exit  F4=Prompt  F12=Cancel  F13=Repeat  F17=Select Employees  F18=Copy
```

Figure 7-2: Create Course Enrollments screen

You use this screen to either enroll employees individually in the course or to select a subset group of employees for enrollment. You can enroll both internal and external employees.

The following fields are required: *Date Enrolled* and *Enrolled By*. You must type a value in either the *Employer* or the *External Employer* fields. If you leave the *External Employer* field blank, you must type a value in the *Employee* field.

The second section of this screen allows you to type in multiple employer and employee numbers, one employee per line. The system creates a separate enrollment record for each line of information you enter.

You can remove an enrollment entry by blanking out all fields on the appropriate line.

6 Enter the employees you are enrolling in the course. Use the following information to complete this screen.

Date Enrolled

The system defaults the current date into this field. You can change the value in this field. The system includes the value you type in this field in each enrollment record it creates from this screen.

Enrolled By

The system defaults the user profile name into this field. You can change the value in this field. The system includes the value you type in this field in each enrollment record it creates from this screen.

Action Code, Action Date and User-Defined Field

The system validates the code values in these optional fields. The code value you type in the *Action Code* field is associated with code type **CEA**, Course Enrollment Action.

The Action Date is the date when this action did or will occur.

The code value you type in the user-defined field is associated with code type **TC6** (Enrollments - User-Defined). The system includes the values you type in these fields in each enrollment record it creates from this screen.

Employer

If you leave the *External Employer* field blank, you must type a value in this field. The employer must exist on the employer file. To have the system repeat the employer you type, place the cursor on that employer identifier and press F13. The system repeats the employer identifier in all *Employer* fields to the end of the file.

Note: If your user profile in Infinium HR has a default employer code set up, the system defaults that value into each line.

Employee

If you leave the *External Employer* field blank, you must type a value in this field. The employee number must exist on the employee file.

Name

If you type a value in the *Employer* field and leave the Employee field blank, you must type a value in this field. If there is a valid value in the *Employer* and *Employee* fields, the system displays the employee name. Use this field to enter the name or other identifier of an external employee (persons taking the course who are not employees of your company).

Status

The system fills the *Status* field of confirmed employees with **C**. It determines the appropriate number of confirmed spaces. The system fills the *Status* field for the remaining employees with **W** (on waiting list). You can change the values in these fields. A third value, **P** (Provisional), is available.

External Employer

The value you type in this field identifies the employer for whom an external employee works. If you type a value in the *Employer* field, you cannot type a value in this field. You create values for the *External Employer* field using the *Update Codes* function, code type **TER**.

Comments

The system includes the value you type in this field in each enrollment record it creates from this screen.

7 Press Enter to validate your entries. In addition to the validation requirements described for the fields above, the system does not allow you to enroll an inactive employee, terminated employee or an employee who is already enrolled in another course at that time. If the employee you are enrolling has not received training in a pre-requisite course, the system displays a warning that you can override.

8 To select a subset group of employees for enrollment, press F17. The system displays a screen similar to the screen in Figure 7-4.

The system automatically enters their employee numbers and names into the subfile list. You can type selection criteria in the *Employer*, *Levels 1 - 4*, *Location*, *Training Group*, and *Job Code* fields to select a subset of employees for enrollment in a course. You also have the option of including or excluding trained employees.

Use the F17 group selection facility when you have ad hoc group training; for example, if everyone in a department comes together to watch a training video or to view a product demonstration. In these instances, you may want to record the attendance as training history for these employees but you do not want to manually type in the enrollments or the training records.

You can also select employees who were enrolled in a previous course and who were unable to attend. To do this, type values in the *Course Start Date* and *Classroom* fields on the first *Update Enrollments* screen. The system displays all active employees who match the selection criteria. You can deselect individual employees from the selected group by blanking out their line entries.

```
 3/10/00  10:42:37     Select Employees to be Enrolled     TRGEXM35   TRDEXM35

Type selection, press Enter

Employer  . . . . . . . . . . .  ___ +
Level 1     . . . . . . . . . .  _____ +
Level 2     . . . . . . . . . .  _____ +
Level 3     . . . . . . . . . .  _____ +
Level 4     . . . . . . . . . .  _____ +
Location  . . . . . . . . . . .  _____ +
Training Group  . . . . . . . .  _____ +
Job Code  . . . . . . . . . . .  _____ +
Exclude Trained Employees . . .  1 (0/1)

or select employees from a previous course (who were unable to attend it)

Course  . . . . . . . . . . . :  ACCOUNT    100-Basic Accounting Practices
Course Start Date . . . . . . .  ________ +
Class Room  . . . . . . . . . .  _____ +



F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Figure 7-3: Select Employees to be Enrolled screen

9 Press F3 to save and exit to the second Update Course Enrollments screen. The system displays messages advising you that it is creating the enrollments.

10 Press F3 to exit this function.

Copying Enrollments

Overview

You can copy enrollments from one course to another. You can specify the course, starting date, classroom and starting time for the course enrollments you are copying.

Copying Enrollments

Complete the following steps to copy enrollments from one course to another.

1. From the Infinium TR main menu select *Employee Enrollments*.

2. Select *Update Enrollments* [UE]. The system displays the Update Course Enrollments screen.

3. Complete the prompt screen using the following field information.

   Course ID

   Type the course identifier in this field or press F4 to select a valid course identifier.

   Course Start Date, Classroom and Start time

   Type the appropriate values in these fields. If you do not know the start date for a course, its classroom or its start time, press F4 in the *Course Start Date* field and select from the list of scheduled courses. When you select a scheduled course from the list, the system also fills in the classroom code and the start time.

4. Press Enter when all the entries are correct. The system displays the Update Course Enrollments screen listing enrollees in the specified course.

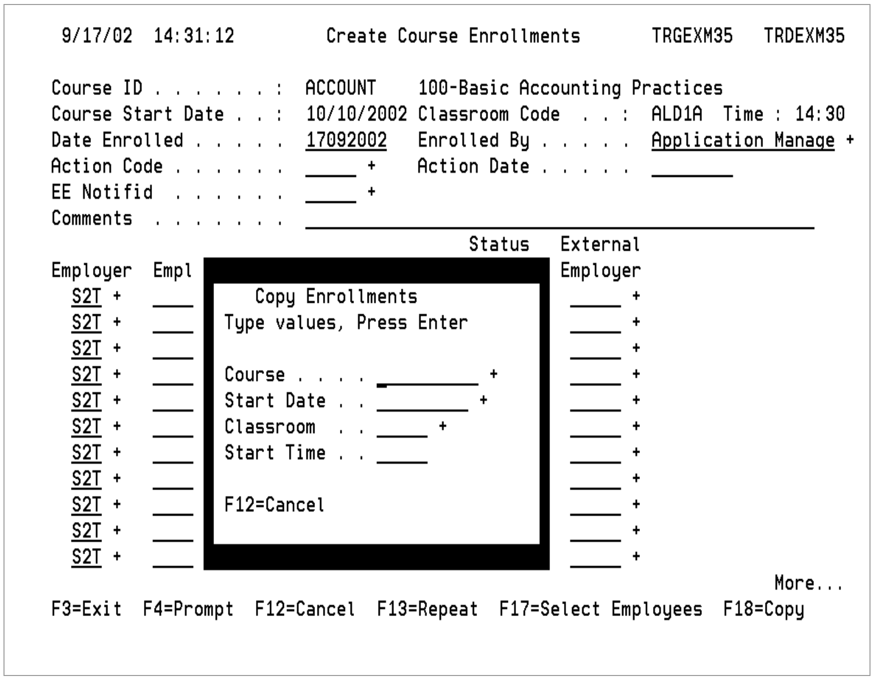
5. Press F6 to create a new enrollment. The system displays a screen similar to the screen shown in Figure 7-4.

```
 9/17/02  14:31:12         Create Course Enrollments       TRGEXM35   TRDEXM35

Course ID . . . . . . . :  ACCOUNT    100-Basic Accounting Practices
Course Start Date . . :  10/10/2002 Classroom Code  . . :  ALD1A  Time : 14:30
Date Enrolled . . . . .  17092002   Enrolled By . . . . .  Application Manage +
Action Code . . . . . .  _____ +    Action Date . . . . .  ________
EE Notifid  . . . . . .  _____ +
Comments  . . . . . . .  __________________________________________________
                                                Status   External
Employer  Employee    Name                      (C/P/W)  Employer
  S2T +   _________ + __________________ +  C         _____ +
  S2T +   _________ + __________________ +  C         _____ +
  S2T +   _________ + __________________ +  C         _____ +
  S2T +   _________ + __________________ +  C         _____ +
  S2T +   _________ + __________________ +  C         _____ +
  S2T +   _________ + __________________ +  C         _____ +
  S2T +   _________ + __________________ +  C         _____ +
  S2T +   _________ + __________________ +  C         _____ +
  S2T +   _________ + __________________ +  C         _____ +
  S2T +   _________ + __________________ +  C         _____ +
  S2T +   _________ + __________________ +  C         _____ +
                                                                   More...
F3=Exit  F4=Prompt  F12=Cancel  F13=Repeat  F17=Select Employees  F18=Copy
```

Figure 7-4: Create Course Enrollments screen

You use this screen to enroll employees individually in the course, to select a subset group of employees for enrollment or to copy the enrollees from another course into this course.

6 Press F18. The system displays a window similar to Figure 7-5.



```
 9/17/02  14:31:12        Create Course Enrollments      TRGEXM35   TRDEXM35

Course ID . . . . . . . :  ACCOUNT    100-Basic Accounting Practices
Course Start Date . . :  10/10/2002 Classroom Code  . . :  ALD1A  Time : 14:30
Date Enrolled . . . . .  17092002   Enrolled By . . . . .  Application Manage +
Action Code . . . . . .  _____ +    Action Date . . . . .  ________
EE Notifid  . . . . . .  _____ +
Comments  . . . . . . .  __________________________________________________
                                                Status   External
Employer  Empl                                           Employer
  S2T +   ____     Copy Enrollments                       _____ +
  S2T +   ____  Type values, Press Enter                  _____ +
  S2T +   ____                                            _____ +
  S2T +   ____  Course . . . .  __________ +              _____ +
  S2T +   ____  Start Date . .  _________ +               _____ +
  S2T +   ____  Classroom  . .  _____ +                   _____ +
  S2T +   ____  Start Time . .  _____                     _____ +
  S2T +   ____                                            _____ +
  S2T +   ____  F12=Cancel                                _____ +
  S2T +   ____                                            _____ +
  S2T +   ____                                            _____ +
                                                                    More...
F3=Exit  F4=Prompt  F12=Cancel  F13=Repeat  F17=Select Employees  F18=Copy
```

Figure 7-5: Copy Enrollments window

7 Use the following information to complete this screen.

Course

Specify the ID for the course from which you are copying enrollees.

Start Date

Specify the date of the course.

Classroom

Specify the classroom of the course.

Start Time

Specify the starting time of the course.

8 Press Enter. The system displays the Create Course Enrollments screen showing the course ID and listing the enrollees for the course.

9 Press F3 to exit and save.

Creating Enrollments from Training Request Records

Overview

Course identifiers and values for the **ROM** (Classroom) and **TAC** (Training Actions) code types must exist before you can create enrollments from training request records.

Values for the **TRS** (Training Reason Code), **TC5** (Requests – User Defined), and **TC6** (Enrollments – User Defined) code types are optional, but you can require this information at your site.

Creating Enrollments for Scheduled Courses from Training Request Records

Complete the following steps to transfer training requests to enrollments:

1. From the Infinium TR main menu select *Employee Enrollments*.
2. Select *Update Enrollments* [UE]. The system displays the Update Course Enrollments screen.
3. Complete the prompt screen using the following field information.

   Course ID

   Type the course identifier in this field or press F4 to select a valid course identifier.

   Course Start Date, Classroom and Start time

   Type the appropriate values in these fields. If you do not know the start date for a course or its classroom and start time, use F4 to prompt on the *Course Start Date* field and select from the list of scheduled courses. When you select a scheduled course from the list, the system automatically fills in the classroom code and the start time.

4 Press Enter when all the entries are correct. The system displays the second Update Course Enrollments screen that lists any persons already enrolled in the course.

5 On the second Update Enrollments screen, press F16 to create enrollments from training requests. The system displays a screen similar to the screen shown in Figure 7-6.

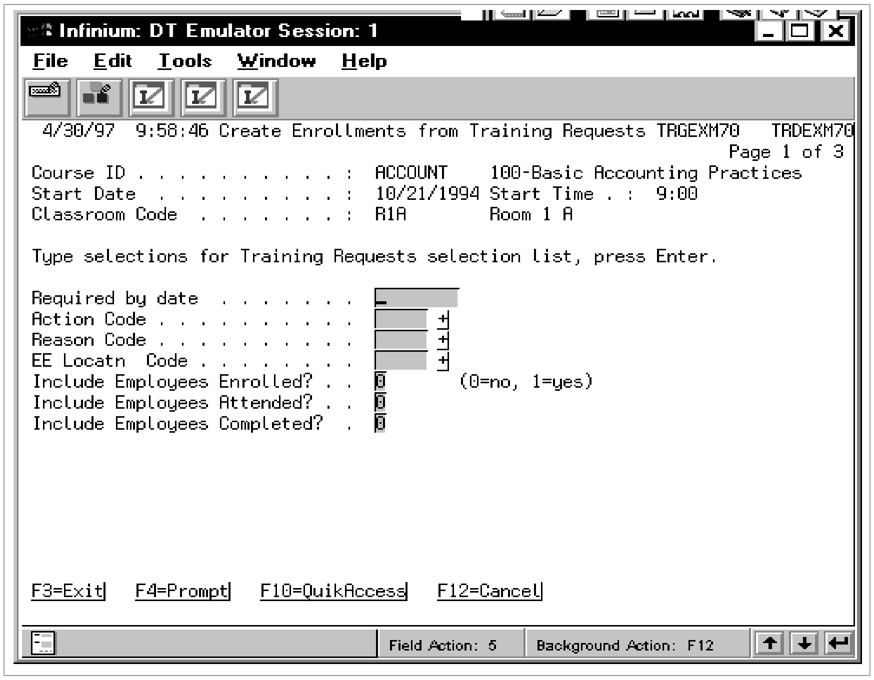


Figure 7-6: Create Enrollments from Training Requests screen 1

Use this screen to enter selection criteria for the subsequent display of a training request selection list.

6 To complete this step, you can do either of the following:

- Display a training request list for specific criteria by making the appropriate entries on the screen. For example, if you type a value in the *Required by date* field, the system displays a list of training requests for all dates on or before the date you type in this field. The system displays the training requests with the most recent date and highest priority first.

  Note: The code value you type in the *Action Code* field is associated with code type **TAC**, Training Action Code. The code value you type in the *Reason Code* field is associated with code type **TRS**, Training Reason Code. The code value you type in the user-defined field, which on this screen is *EE Locatn Code*, is associated with code value **TC6**, Enrollments - User Defined.

You can decide if you want to include people in your training request list who are currently enrolled, have attended or who have completed the course.

- Display a list of all training requests for the specified course by leaving all the fields on the Create Enrollments from Training Requests screen blank. The system displays a complete list of training request records for the course.

7 Press Enter. The system displays a screen similar to the screen shown in Figure 7-7.

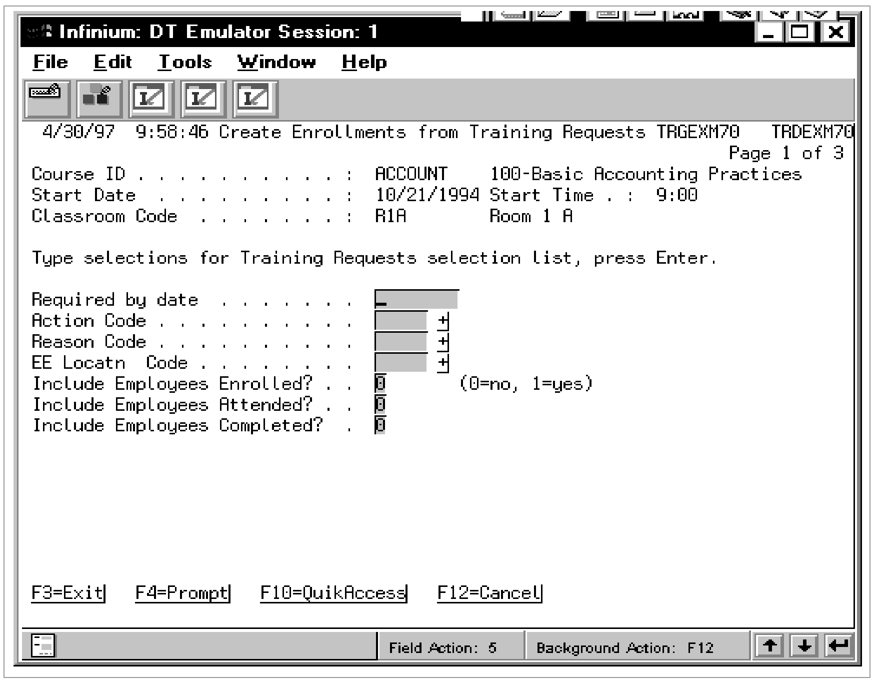


Figure 7-7: Create Enrollments from Training Requests screen 2

Use this screen to edit the list of employees and create enrollments for those employees.

You can create course enrollment records for some or all of the employees listed.

To display the selection criteria you used on the previous screen, press F16.

8 Edit the list by deselecting any employees who should not be enrolled in the course (for example, terminated employees or those already enrolled in the course).

9 Press F21 to enroll all employees that are on the selected list. The system displays a confirmation window.

10 Press Enter to confirm that the enrollment information is correct or press F12 to return to the previous screen where you can either edit the list or press F3 to exit.

Before generating the enrollment list, the system checks for the following:

- Available space for the course
- The employee's prior enrollment in the course
- Terminated employees

The system creates the enrollments and returns you to the Create Enrollments from Training Requests screen, where you can view the new employee enrollments.

The system does not delete the training requests for the enrolled employees at this stage. The system uses the training requests again if employees cancel from or do not attend the course. The system deletes training requests only when it confirms attendance and creates training history.

11 Press F3 twice to save and exit to the menu or desktop.

Creating Course Enrollments Automatically

Overview

Infinium TR allows you to automatically generate course enrollments. Before you actually generate the course enrollment records, you should use the *Mass Enrollments Trial* function that prints a list of persons who are eligible for enrollment in the course. Print the trial list to review the information and edit it if necessary before running the *Mass Enrollment* function.

Infinium TR allows you to mass enroll employees in courses. Before you actually update course enrollments using the *Mass Enrollments* function, you should use the *Mass Enrollments Trial* function. The trial function generates a report that you can review before actually enrolling employees and make any edits before actually creating the enrollment records.

You can use the Mass Enrollment Report - Trial for course scheduling and planning (modeling course schedules). The report prints in course date order, showing the employees in alphabetic order that the system would automatically enroll in each scheduled course as well as those that would not be enrolled due to lack of available places.

This report also includes the Infinium HR levels as an aid in identification.

The system matches the training requests against the available places defined in the scheduled course, and processes the training requests in priority order based on the value in the *Required By Date* field. The system enrolls employees from training requests starting from the effective date of the first scheduled course specified until the course is filled, and then moves to the next scheduled course.

The following controls must be in place before you perform this task:

Identifiers in Infinium HR for employers, employees, and levels.

Identifiers for courses and values for the **TAC** (Training Actions), **TGP** (Training Group), **TC5** (Request - User Defined), and **TC6** (Enrollments - User Defined) code types

Creating Course Enrollments

Complete the following steps to automatically generate trial enrollments:

1. From the Infinium TR main menu, select *Employee Enrollments*.

2. Select *Mass Enrollments Trial* [MET]. The system displays a screen similar to the screen shown in Figure 7-8.

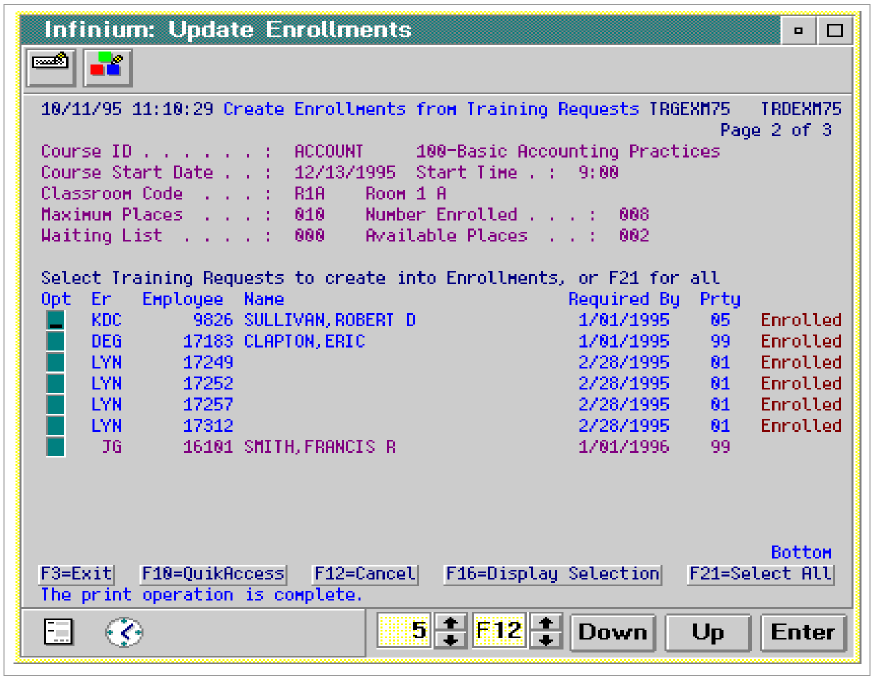


Figure 7-8: Mass Enrollments Trial screen

Use this screen to automatically enroll groups of employees in courses for which they have outstanding training requests. *Effective Date*, *Requirement Date*, *Enrolled By* and *Status* are required fields.

The current date defaults into the *Effective Date* field, which you can change. The system processes only those courses scheduled to be held after the effective date you enter. The system processes only those training requests with a required by date that is the same as or earlier than the requirement date you enter.

The system does not enroll terminated employees in courses.

The screen is divided into two sections. Use the top section to enter the selections that control which employees and training requests the system will process. The second section allows you to enter field values that the system places on each enrollment record it creates.

You can generate enrollments for groups of employees by typing values in the following fields: *Course ID*, *Employer ID*, *Employee ID*, *Levels 1 through 4*, User-Defined field (code type TC5 - Requests), which on this screen is *EE Locatn Code*, and *Training Group*. You can leave a selection field blank when it is not applicable.

3. Complete your entries on the Mass Enrollments Trial screen.
4. Press Enter to submit the job that produces the trial enrollments report.

Creating Course Enrollments Automatically

Complete the following steps to automatically create course enrollments:

1. Review the trial enrollments report.
2. When you are confident it is correct, select *Mass Enrollment* [ME].
3. Complete your entries on the prompt screen as described in the section that follows Figure 7-8.
4. Press Enter to submit the job that creates the enrollments.

Printing Course Sign-in Sheets

Overview

You use the *Print Course Sign-in Sheets* function to print a list showing those employees enrolled in a course. The system prints the list in alphabetical order. You can print the list for all courses, classrooms and dates, or you can specify that you want the list for a single course, classroom, or schedule date. You can include only confirmed enrollees, those who are on the waiting list, and those who are provisional enrollees.

Course identifiers and values for the **ROM** (Classroom) code type must exist before you can print course sign-in sheets.

Printing Course Sign-in Sheets

Complete the following steps to print sign-in sheets for a course(s):

1. From the Infinium TR main menu select *Employee Enrollments*.
2. Select *Print Course Sign-in Sheets* [PCS]. The system displays a screen similar to the screen shown in Figure 7-9.

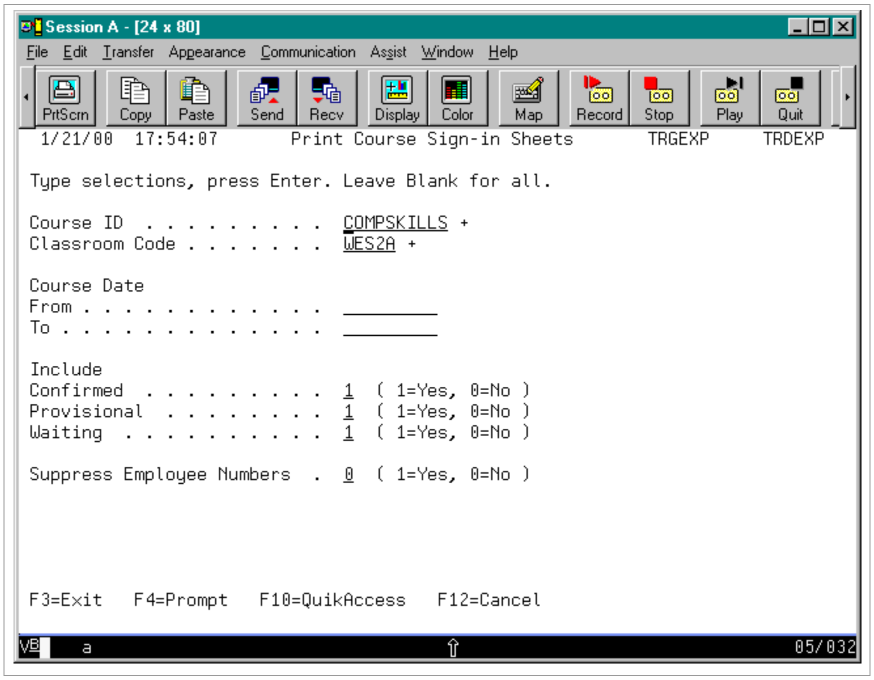


Figure 7-9: Print Course Sign-in Sheets screen

Use this screen to enter printing criteria for the sign-in sheets. You are required to specify whether you want to include confirmed, provisional or enrollees who have been placed on a waiting list.

You can indicate whether you want the sign-in sheets for one or all courses or for one or all classrooms. You also have the option of printing sign-in sheets for a date range.

You can type **1** in the *Suppress Employee Numbers* field to suppress printing of the employee numbers, or you can type **0** to print these numbers on the course sign-in sheets.

Complete your entries on the Print Course Sign-in Sheets screen.

3 Press Enter to submit the job for printing.

Notes

Chapter 8 Working with Course Attendance Records

8

This chapter includes the tasks you perform when you create course attendance records.

The chapter consists of the following topics:

Overview of Course Attendance

You use the *Update Course Attendance* function to do the following:

- Confirm employee attendance at scheduled courses and create any new required attendance records. When you access the *Update Course Attendance* function, the system displays a list of all employees and any non-employees who were enrolled on the course. The system sets the attendance indicator of confirmed or provisional enrollees on this list to the value in the *Attendance Indicator* field on the scheduled course record. This value is either **1**, yes, attended, or **0**, no, did not attend.

  The *Attendance Indicator* field on the course allows you to assign a default attendance value for all enrollees. You can then change the attendance information as necessary. You can directly update the attendance indicators on the list of displayed employees.

- Confirm employee skill level for the scheduled course. The system uses the value from the skill level specified on the course master as the default value. You can manually update the skill level value for each employee listed.
- Manually create an attendance record for any employees or non-employees who attended the course but were not enrolled and, therefore, do not appear on the list.
- Use the attendance list to enter a code value for the grade the employee received for the course, the employee's rank or score for the course, as well as an assessment code value describing the employee's evaluation of the course.
- Mass enter attendee's grades marks and assessments.
- Update an employee's course stage information and any individual exercises or test results.

  Course stages are designed to be used with the assessment of an employee's competencies and potential. Follow-up stages associated with the course often follow the classroom portion of a course. Exercises are designed to be used to measure employee competency levels. Tests record employee scores or the results of specific tasks.

- Update the status of the scheduled course to **Completed** so that training history can be created.

Before you can work with course attendance information, the following must exist:

- Employees should normally be enrolled in courses; although, as described above, it is not essential since you can manually enter attendance records. Manually creating attendance records, however, is designed to be used for exceptions only.
- If you are recording completion of course stages for employees, course stages must exist. You create these using the *Update Sessions/Stages* function in *Sessions/Stages* in *Course Catalog*.
- If you are recording exercises, exercise competencies, and test results, the exercises, exercise competencies, and tests must exist. You create these using the *Update Exercises/Tests* function in *Exercises/Tests* in *Course Catalog*.
- If you use the following code types, code values for these code types must exist:
  - Course Grades **GRA**
  - Course Assessments **ASS**

You create these using the *Update Codes* function in *Codes* in *Master Files*.

Course attendance is the third stage in the training cycle. This stage follows training requests and course enrollments. After you have completed the employee attendance tasks, you can update training history.

Objectives

After you complete this chapter you should be familiar with how to use the *Update Course Attendance* function to perform the following attendance related activities:

- Confirm course attendance
- Identify employees who did not attend the course
- Create additional attendance records
- Enter course assessment and grade codes
- Update employee course stage information
- Update employee exercise and test results
- Generate employee training history

After you enter attendance information for a course, you can then create the training history.

Working with Course Attendance

Overview

Once you access the *Update Course Attendance* function, which lists all employees and non-employees who were enrolled in the course when you used the *Update Enrollments* function, you can perform the following tasks:

- Delete a course attendance record
- Notify the system of any employees who did not attend the course
- Update an employee's individual course assessment codes, grade codes or marks
- Mass enter grades, marks and assessments for an individual course
- Indicate that the course attendance record is completed
- Create training history records for all employees who attended the course
- Create a new training history record for the course
- Record an employee's exercise and test results
- Record the details of an employee's progress through the various course stages
- Record cancellation details

Accessing the Course Attendance Records

Complete the following steps to access the screen on which you work with course attendance records:

1. From the Infinium TR main menu select *Attendance.*
2. Select *Update Course Attendance* [UCA].
3. Use the following information to complete this screen:

   Course ID

   Type the identifier for the course or press F4 to select a valid course.

Start Date, Classroom and Start Time

If you do not know the start date for a course or its classroom and start time, press F4 on the *Start Date* field and select from a list of scheduled courses. When you select a scheduled course from the list, the system automatically provides the classroom code and start time.

If there is only one occurrence of a course scheduled on a particular date, you can leave the *Classroom* and *Start Time* fields blank. The system identifies the course by using the information in the *Course ID* and *Start Date* fields.

4 Press Enter to display a screen similar to the screen shown in Figure 8-1.

```
 9/10/02    12:54:27        Update Course Attendance       TRGEXM50   TRDEXM50
                                                                   Page 2 of 3
Course ID . . . . . . . . . . . :  ABCDEFJHIJ 100-Basic Accounting Practices
Course Start Date . . . . . . . :  16/08/2002 Start Time  . . . . . :
Classroom Code  . . . . . . . . :  ALD1A ALDERSHOT BEECH ROOM
Type options, press Enter.
  4=Delete   6=Create Training History   7=Exercises/Tests   8=Sessions/Stages
  9=Cancellation Details
Loc __________________                                                C (C/P/W)
Opt Name               Er  Employee Attend Skill Grade  Mark Assmt    Status
 _  Bacs Test,D.       S2T        34    1     0   FAIL  + ___ _____ + Confirmed
 _  Brown, John                         1     0   _____ + ___ _____ + Confirmed
 _  Browne,N.          S2T        47    1     0   _____ + ___ _____ + Confirmed
 _  Petersen James                      1     0   _____ + ___ _____ + Confirmed










                                                                         Bottom
F3=Exit  F4=Prompt  F6=Create  F15=Create Hist  F16=Completed  F24=More Keys
```

Figure 8-1: Update Course Attendance screen 2

This screen displays the attendance records for the specified course. You use this screen to perform the following tasks:

- Delete a course attendance record
- Notify the system of any employees who attended or did not attend the course
- Update an employee's individual course assessment codes, grade codes or marks
- Mass enter grades, marks and assessments for the individual course
- Indicate that the course attendance record is completed

- Create training history records for all employees who attended the course
- Create a new training history record
- Record an employee's exercise and test results
- Record the details of an employee's progress through the various course stages
- Mass update an employee's completion of sessions and stages
- Record employee cancellation information

Below is a discussion of each of these tasks that you perform from this screen.

Locating Employee Information

To locate specific employee enrollment records, you can use the *Loc* and *(C/P/W)* fields.

Loc

To locate a specific employee, within the list of enrollments, type some or all of the last name or type the last name and some or all of the first name. Press Enter. The system redisplays the list showing the employee whose name most closely matches your entry alphabetically at the top of the list.

The list is displayed in alphabetical name order for each enrollment status, A to Z for confirmed enrollments followed by A to Z for provisional enrollments and A to Z for waitlisted enrollments.

The locate feature uses the status selection field to the right of the *Loc* field to determine the status of enrollments to search. The default status selection is **C**, Confirmed. To locate an employee whose status is **W**, waitlisted, you must change the status value to **W**. If you do not know the employee's enrollment status, you may need to use locate for each status.

(C/P/W)

Use this field with the *Loc* field to locate a particular employee within the list of enrollments.

Valid values are:

C	Confirmed
P	Provisional

W Waitlisted

Deleting a Course Attendance Record

Complete the following steps to delete a course attendance record:

1. From the Infinium TR main menu select *Attendance*.
2. Select *Update Course Attendance* [UCA].
3. Complete the prompt screen and press Enter. For information about the prompt fields, refer to the topic “Accessing the Course Attendance Records.”
4. On the Update Course Attendance screen shown in Figure 8-1, select the course attendance record to delete with **4** and press Enter.

   Delete an attendance record in the following instances:

   - Once you create a non-employee attendance record, you cannot update the non-employee’s name or the external employer. If the information you entered is not correct, delete the incorrect attendance record and re-enter the information correctly.
   - Non-attendance records from the course attendance display list after you re-enroll employees or if re-enrollment is not required.

Notifying the System of Enrollees’ Attendance Status

Complete the following steps to notify the system of the enrollees’ attendance status:

1. From the Infinium TR main menu select *Attendance*.
2. Select *Update Course Attendance* [UCA].
3. Complete the prompt screen and press Enter. For information about the prompt fields, refer to the topic “Accessing the Course Attendance Records.”
4. From the Update Course Attendance screen shown in Figure 8-1, you can change *Attend* to either **1**, attended or **0**, did not attend. The default value for *Attend* is from the *Attendance Indicator* field on the scheduled course and displays in the list of confirmed or provisional enrollees.

The screen also displays employees on the waiting list with their attendance indicator set to **0**, No. You can change *Attend* to **1**, attended, for an employee on the waiting list who did attend the course.

5 Press Enter to save your changes.

Updating an Employee's Individual Course Grade Codes, Marks or Assessment Codes

Complete the following steps to update grades, marks or assessments:

1 From the Infinium TR main menu select *Attendance*.

2 Select *Update Course Attendance* [UCA].

3 Complete the prompt screen and press Enter. For information about the prompt fields, refer to the topic on "Accessing the Course Attendance Records."

4 On the Update Course Attendance screen shown in Figure 8-1, type the appropriate value(s) in the *Grade*, *Marks* or *Assmt* fields. You can press F4 on the *Assmt* and *Grade* fields to display a list of valid values.

5 Press Enter.

Mass Entering Individual Course Grade Codes, Marks and Assessment

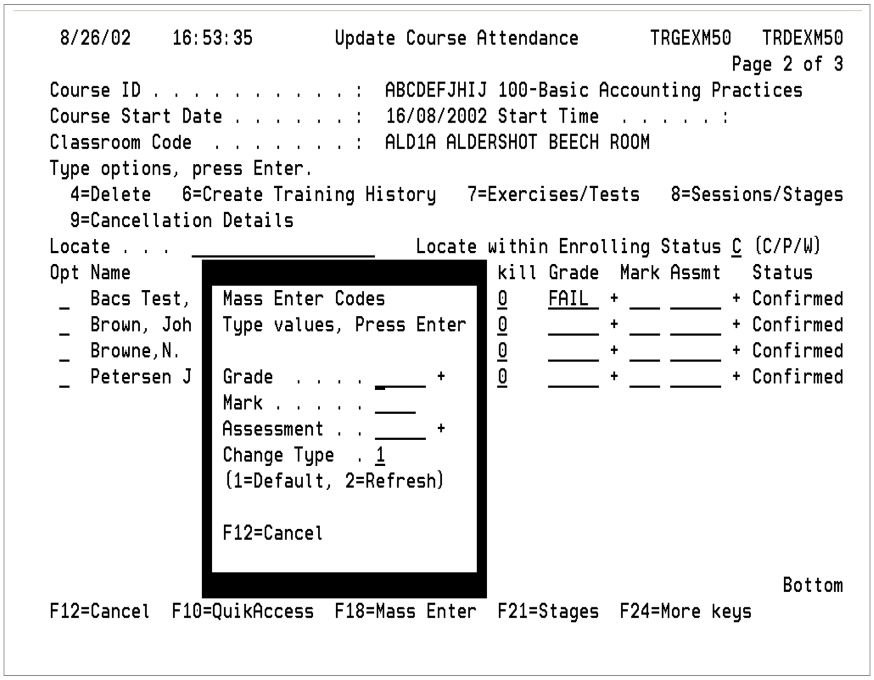
Complete the following steps to mass enter grade codes, marks or assessment codes:

1 From the Infinium TR main menu select *Attendance*.

2 Select *Update Course Attendance* [UCA].

3 Complete the prompt screen and press Enter. For information about the prompt fields, refer to the topic on "Accessing the Course Attendance Records."

4 On the Update Course Attendance screen shown in Figure 8-1, press F18. The system displays the Mass Enter Codes window similar to the one shown in Figure 8-2.



```
 8/26/02    16:53:35       Update Course Attendance      TRGEXM50   TRDEXM50
                                                                Page 2 of 3
Course ID . . . . . . . . . . . :  ABCDEFJHIJ 100-Basic Accounting Practices
Course Start Date . . . . . . . :  16/08/2002 Start Time  . . . . . :
Classroom Code  . . . . . . . . :  ALD1A ALDERSHOT BEECH ROOM
Type options, press Enter.
  4=Delete   6=Create Training History   7=Exercises/Tests   8=Sessions/Stages
  9=Cancellation Details
Locate . . .  __________________   Locate within Enrolling Status C (C/P/W)
Opt Name                                       kill Grade  Mark Assmt   Status
 _   Bacs Test,    Mass Enter Codes            0    FAIL  + ___ _____ + Confirmed
 _   Brown, Joh    Type values, Press Enter    0    _____ + ___ _____ + Confirmed
 _   Browne,N.                                 0    _____ + ___ _____ + Confirmed
 _   Petersen J    Grade  . . . . _____ +      0    _____ + ___ _____ + Confirmed
                   Mark . . . . . ____
                   Assessment . . _____ +
                   Change Type  . 1
                   (1=Default, 2=Refresh)

                   F12=Cancel

                                                                      Bottom
F12=Cancel  F10=QuikAccess  F18=Mass Enter  F21=Stages  F24=More keys
```

Figure 8-2: Update Course Attendance Mass Enter Codes window

Use the information below to complete the fields in the window.

Grade

Specify the grade for all course attendees who do not have a grade on their course attendance record.

Mark

Specify the mark for all course attendees who do not have a mark on their course attendance record.

Assessment

Specify the assessment for all course attendees who do not have an assessment on their course attendance record.

Change Type

Specify whether to override grades, marks or assessments in the employee's attendance record. Valid values are:

1 If no value for a grade, mark or assessment is on the employee's attendance record, use the specified values as the default on the employee's attendance record.

2	Overwrite existing grade, mark or assessment values in the employee’s attendance record with the values entered in this window.

Indicating the Course Attendance Record Is Completed

Complete the following steps to mark a course attendance record as completed:

1. Access the Update Course Attendance screen by selecting *Attendance* and then select *Update Course Attendance* [UCA].
2. Complete the prompt screen and press Enter. For information about the prompt fields, refer to the topic on “Accessing the Course Attendance Records.”
3. On the Update Course Attendance screen shown in Figure 8-1, press F16 to indicate that you have finished making all the entries in this function. This is required before the system can generate training history.
4. After you press F16, the system displays the following message under the classroom description: **Attendance Completed**. This changes the status of the scheduled course record to **Completed**.

   If you press F16 in error or before you have completed all your entries, you can restore the course status to **Attended** by pressing F16 again.

Creating Training History Records for All Employees Who Attended the Course

Complete the following steps to create training history records for all employees who attended the course:

1. Access the Update Course Attendance screen by selecting *Attendance* and then select *Update Course Attendance* [UCA].
2. Complete the prompt screen and press Enter. For information about the prompt fields, refer to the topic on “Accessing the Course Attendance Records.”
3. You can create training history records from the Update Course Attendance screen shown in Figure 8-1 by using one of the following methods:

- Press F15. The system requires that you confirm attendance and mark course attendance as completed before it can create a history record.
- Create a training history record for the employee by selecting a course attendance record with **6**.

For more information, you can refer to the topic “Generating Employee Training History.”

Creating a New Attendance Record for an Employee

Complete the following steps to create a new attendance record for an employee:

1 Access the Update Course Attendance screen by selecting *Attendance* and then select *Update Course Attendance* [UCA].

2 Complete the prompt screen and press Enter. For information about the prompt fields, refer to the topic on “Accessing the Course Attendance Records.”

3 Press F6 on the Update Course Attendance screen to create a new attendance record for an employee. The system displays a screen similar to the screen shown in Figure 8-3.

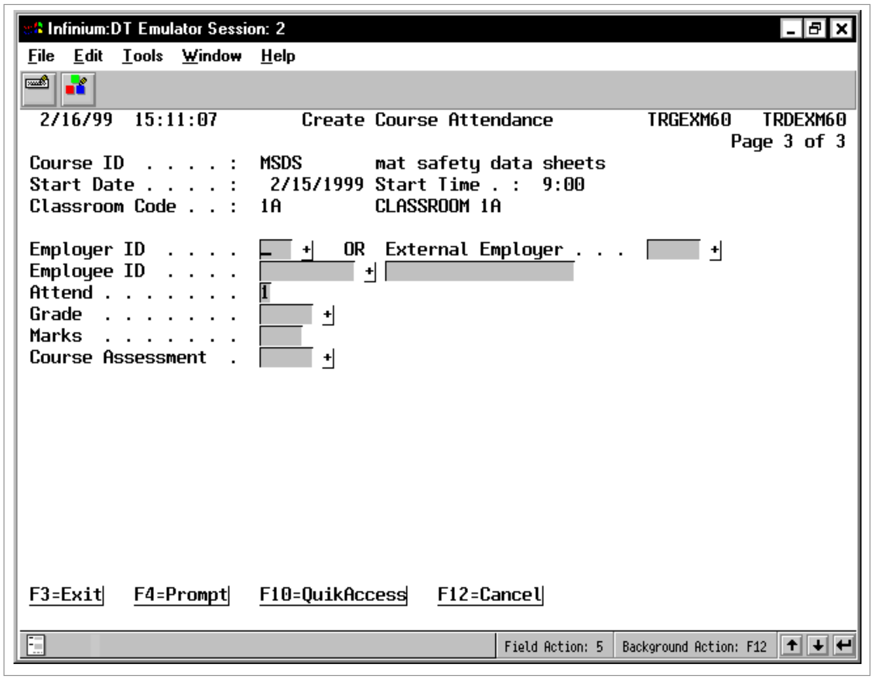


Figure 8-3: Create Course Attendance screen

Use this screen to create an attendance record for any employee not previously enrolled in the course. The following fields are required: *ER*, *Employee*, and *Attend*.

Once you create a non-employee (external delegate) attendance record, you cannot update the non-employee's name or the external employer. If the information you entered is not correct, delete the incorrect attendance record and re-enter the information correctly.

4 Complete the fields on this screen using the following information:

Employer ID and Employee ID

To create an attendance record for an employee, you must type a value in these fields.

External Employer

To create an attendance record for someone who is not one of your employees, enter an external employer code in the *External Employer* field and enter that person's name in the field provided immediately under the *External Employer* field next to the *Employee ID* field. If the *Validate Non-Employees* field on the Entity Control is set to **1**, any non-employees that you enter here must exist in the Non-Employees file.

Attend

The value in this field specifies whether the employee attended the class. The default value in this field is **1** (Yes). You can change this to **0** (No) when necessary.

Grade and Marks

The information you type in these fields reflects the employee's achievement in the course. Type a code value in the *Grade* field that is related to the GRA code type. You can type a 1-to 3-digit numeric value in the *Marks* field.

5 Press Enter to validate the information you entered. Press F3 to exit and save.

Recording Exercise and Test Results

Complete the following steps to record exercise and test results:

1 Access the Update Course Attendance screen by selecting *Attendance* and then select *Update Course Attendance* [UCA].

2 Complete the prompt screen and press Enter. For information about the prompt fields, refer to the topic on “Accessing the Course Attendance Records.”

3 Type **7** next to the employee whose record you are updating. The system displays a screen similar to the screen shown in Figure 8-4.

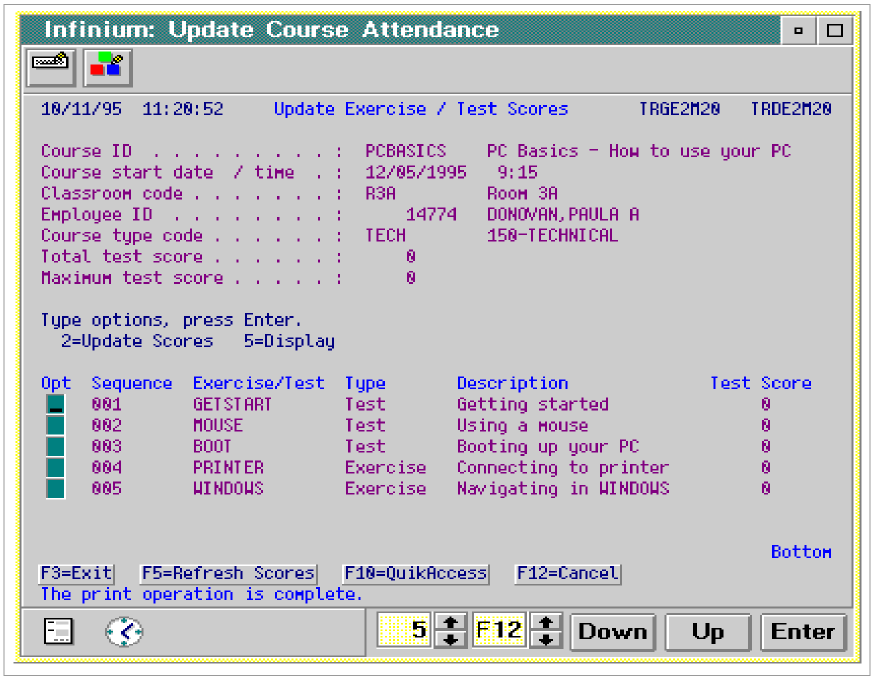


Figure 8-4: Update Exercise/Test Scores screen

This screen lists all the exercises and tests defined for this course. Use this screen to update the employee’s scores (option **2**), display results (option **5**) or to refresh scores F5.

4 Type **2** next to the test or exercise for which you want to enter the employee’s actual results.

When you type **2** next to an exercise record, the system displays a screen similar to the screen shown in Figure 8-5. When you type **2** next to a test record, the system displays a screen similar to the screen shown in Figure 8-6.

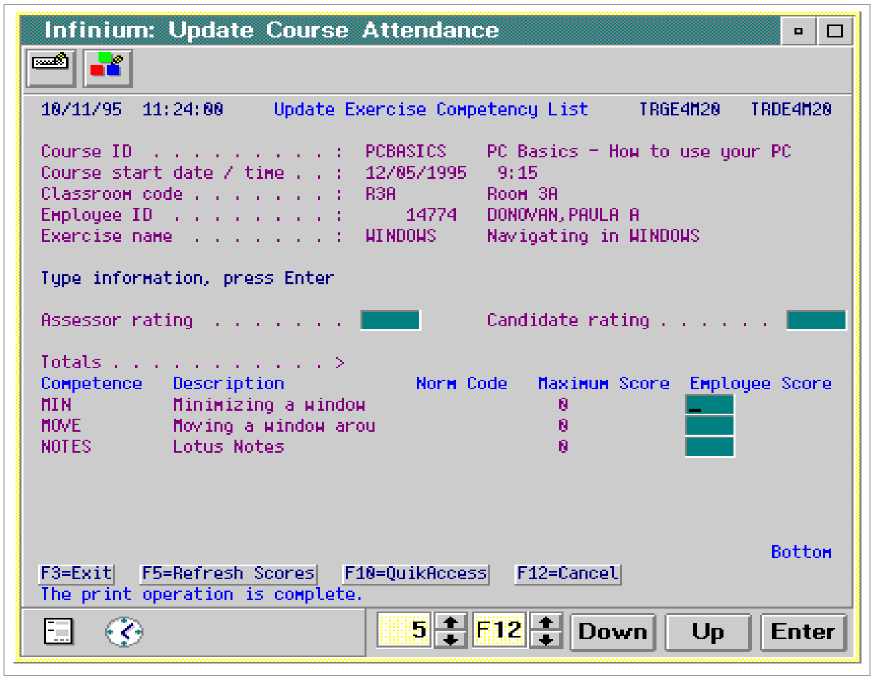


Figure 8-5: Update Exercise Competency List screen

If you selected an exercise, the system lists all the competencies the exercise assesses. The system displays the maximum score value that you defined when you set up the exercise.

5 Type information in the *Assessor rating* and *Candidate rating* fields and enter the scores for each competency.

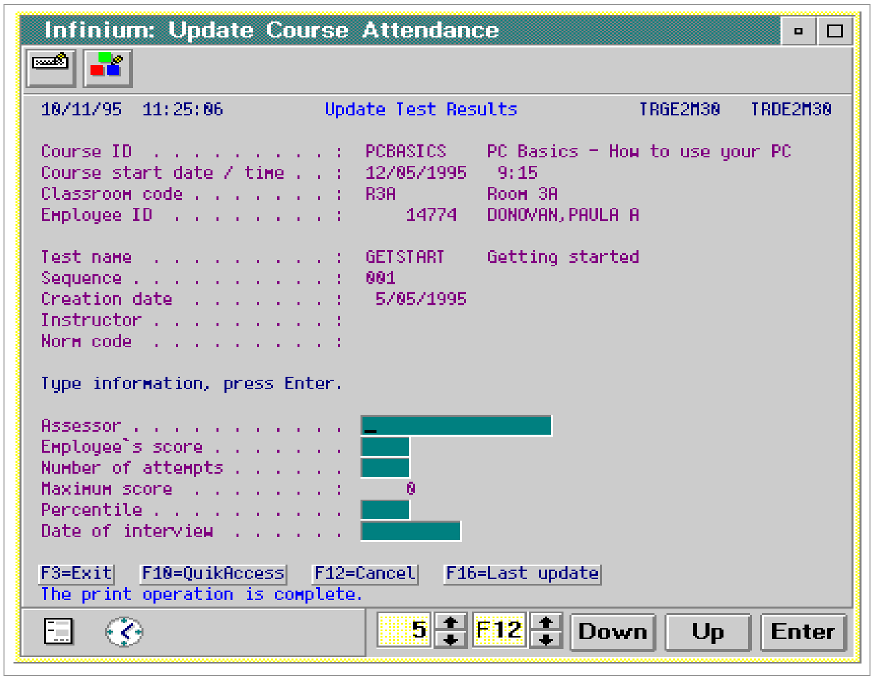


Figure 8-6: Update Test Results screen

If you selected an exercise, the system lists one set of fields for that test. The system displays the maximum score value that you defined when you set up the test. *Employee’s score* is a required field.

6 To update the test results, type information in the *Assessor*, *Employee’s score*, *Number of attempts*, *Percentile*, and *Date of interview* fields. The system validates your entries and ensures that you do not enter a score greater than the maximum score value.

7 Press F3 to exit and save.

Recording Employee Information for Course Stages

You use course stages to assess an employee’s competencies and potential. Follow-up stages associated with the course often follow the classroom portion of a course. The report you obtain when you run the *Print Session/Stages* function enables you to identify employees whose stages are incomplete. For more information about this report, refer to the “Printing Reports and Performing Inquires” chapter

Complete the following steps to record course stage information:

1 Access the Update Course Attendance screen by selecting *Attendance* and then select *Update Course Attendance* [UCA].

2 Complete the prompt screen and press Enter. For information about the prompt fields, refer to the topic on “Accessing the Course Attendance Records.”

3 Type **8** next to the employee whose record you are updating. The system displays a screen similar to the screen shown in Figure 8-7.

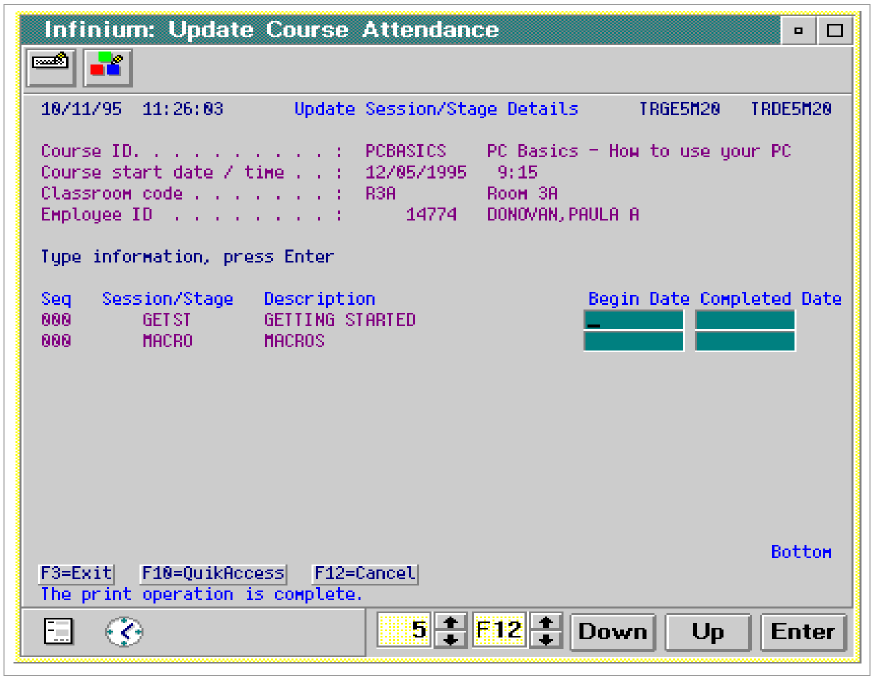


Figure 8-7: Update Session/Stage Details screen – record employee information

This screen lists all course stages for this course. Enter dates for each stage. The dates record the employee’s progress through these stages.

4 Type information in the *Begin Date* and *Completed Date* fields for the specified stage.

5 Press F3 to exit and save.

Updating Employee Completion of Course Stages

Complete the following steps to record course stage information:

1 Access the Update Course Attendance screen by selecting *Attendance* and then select *Update Course Attendance* [UCA].

2 Complete the prompt screen and press Enter. For information about the prompt fields, refer to the topic on “Accessing the Course Attendance Records.”

3 Press F21 to display stage information. The system displays a screen similar to the screen shown in Figure 8-8.

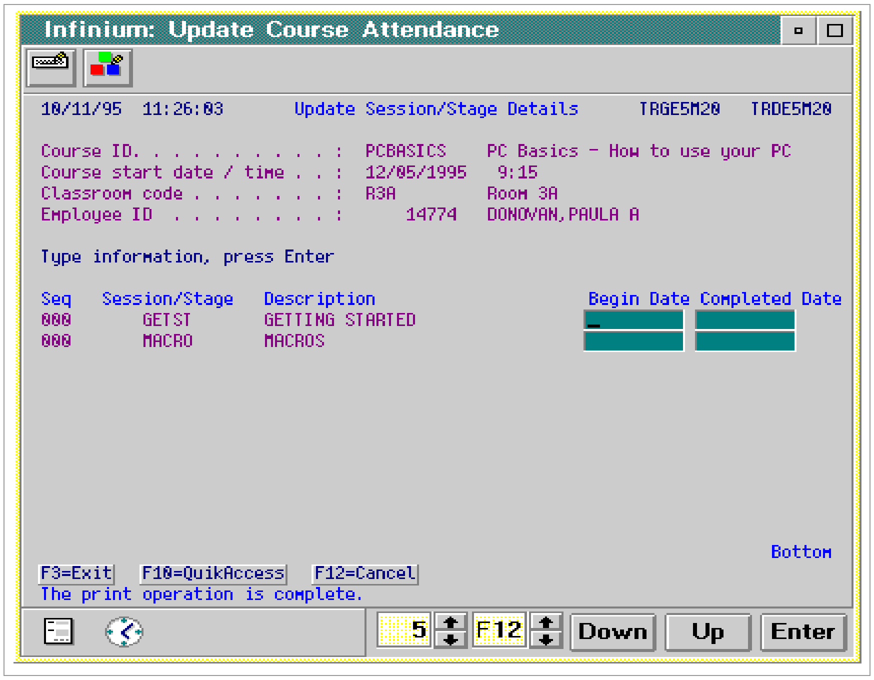


Figure 8-8: Update Session/Stage Details screen – mass update employee completion

4 Type the appropriate date information in the *Begin Date* and *Completed Date* fields.

5 Press F3 to exit and save.

Generating Employee Training History

You generate training history as the final stage in the training cycle after you create the training requests, course enrollments and course attendance.

Three methods are available for you to create employee training history. This section deals with the primary method of generating multiple employee training history records directly from the *Update Course Attendance* function. The other methods involve manual entry and are described in the parts on “Creating Training Requests,” and “Managing Training History.”

Generating Employee Training History Records from Course Attendance

Once you complete the *Update Course Attendance* function by entering any attendance exceptions and results and confirm course attendance, use the confirmed course attendance records to create the actual employee training history.

You can generate the training history directly from the Update Course Attendance screen shown in Figure 8-1 earlier in this chapter. If you are working in the *Update Course Attendance* function on screen 2, go to step 5. Otherwise, complete the following steps:

1. From the Infinium TR main menu select *Attendance.*
2. Select *Update Course Attendance* [UCA].
3. Enter the identifier for the course and the starting date.
4. Press Enter to display a screen similar to the screen shown in Figure 8-9.

```
 9/10/02    12:54:27       Update Course Attendance      TRGEXM50   TRDEXM50
                                                                 Page 2 of 3
Course ID . . . . . . . . . . . :  ABCDEFJHIJ 100-Basic Accounting Practices
Course Start Date . . . . . . . :  16/08/2002 Start Time  . . . . . :
Classroom Code  . . . . . . . . :  ALD1A ALDERSHOT BEECH ROOM
Type options, press Enter.
  4=Delete   6=Create Training History   7=Exercises/Tests   8=Sessions/Stages
  9=Cancellation Details
Loc __________________                                                C (C/P/W)
Opt Name               Er  Employee Attend Skill Grade  Mark Assmt   Status
 _  Bacs Test,D.       S2T       34    1     0   FAIL  + ___ _____ + Confirmed
 _  Brown, John                        1     0   _____ + ___ _____ + Confirmed
 _  Browne,N.          S2T       47    1     0   _____ + ___ _____ + Confirmed
 _  Petersen James                     1     0   _____ + ___ _____ + Confirmed









                                                                        Bottom
F3=Exit  F4=Prompt  F6=Create  F15=Create Hist  F16=Completed  F24=More Keys
```

Figure 8-9: Update Course Attendance screen 2

This screen lists all employees who were enrolled in the course when you used the *Update Enrollments* function.

5 Press F16 to advise the system that your attendance entries for this course are completed. The system displays the following message: **Attendance Completed**. The system also changes the value in the *Status* column of the scheduled course to **Completed**.

If you press F16 to indicate course completion, and if the selected training course has associated sessions/stages records for which *Begin Date* and *Completed Date* values were not entered, and if these values were entered for prior courses, the system displays a warning message that sessions/stages information needs to be entered.

You can press Enter to return to the Update Course Attendance screen and then complete the sessions/stages information, or you can press F11 to override this message and complete the course.

6 Press F21 to update sessions/stages. If all attendees completed the stages on the same date, the system updates all attendee stages with these dates. The system displays a screen similar to the screen shown in Figure 8-10.

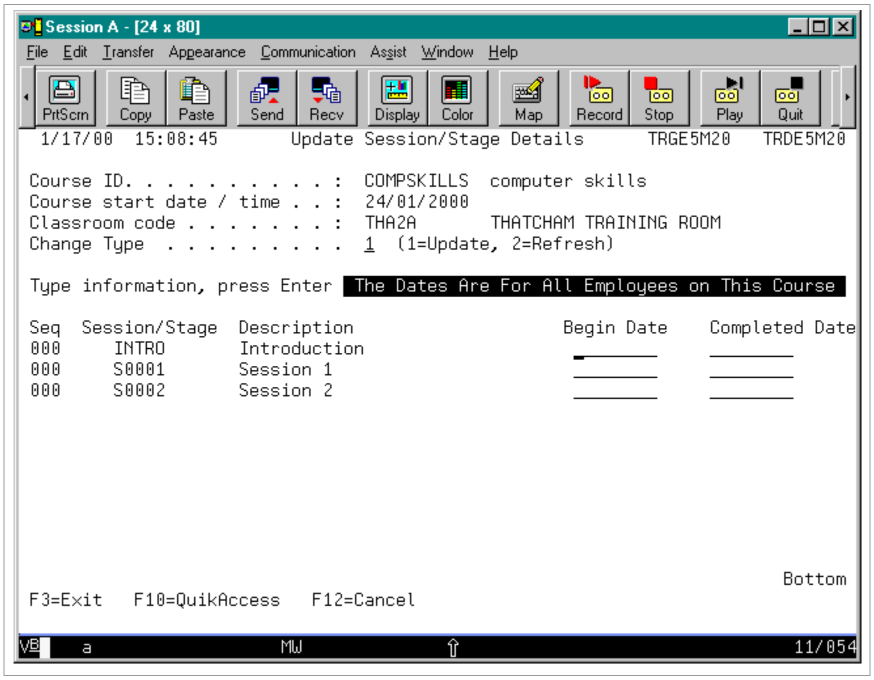


Figure 8-10: Update Session/Stage Details screen

7 When you are done updating sessions and stages, return to the Update Course Attendance screen, shown in Figure 8-9, and do one of the following:

- Press F15 to select all employees who attended the course, that is, those whose attendance indicator is **1**.
- Select a group of employees by typing **6** in the *Opt* field next to those employees and press Enter. The system selects only those whose attendance indicator is **1**.

In both cases the system displays the selected employees on the Create Training History screen, similar to the screen in Figure 8-11.

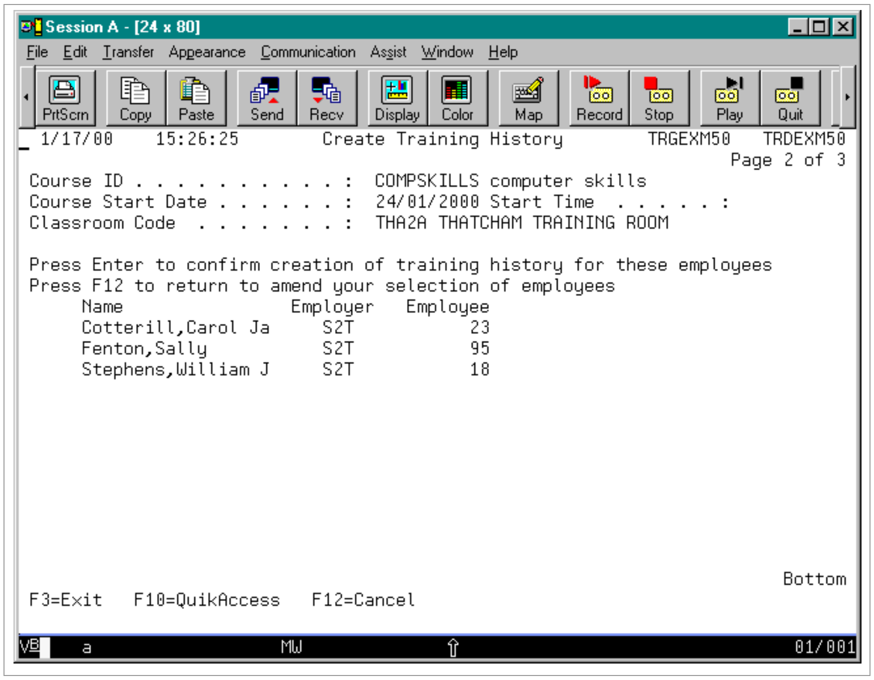


Figure 8-11: Create Training History screen

8 Use the information on this screen to confirm attendance records before the system creates the training history. If this information is not correct, press F12 to re-select or cancel and return to the list of all employees who were enrolled in the course when you used the *Update Enrollments* function. Repeat steps 6 and 7.

9 When the list of selected employees is correct, press Enter to generate the training history for these employees. When you press Enter, the system does the following:

- Interactively creates training history records for all the selected employees and produces a report listing the employee training records it created
- Creates skill/competency records in Infinium HR for skill/competency levels other than **0** or **Blank**. If the skill/competency record already exists, the system updates the record from Infinium TR.

The system then returns you to the Update Course Attendance screen.

After the system generates employee training history records, it deletes the corresponding employee course attendance records, enrollment records, and the training requests for that course.

When you return to the Update Course Attendance screen, the system no longer displays the employees whose training history records you created.

The system does, however, display the employees who did not attend the course, employees on the waiting list for the course, and non-employees.

The system does not delete the records of the employees who did not attend the course. Retaining these records allows you to re-enroll them into another scheduled course. You may, for example, have some employees on a waiting list for the course. You can either manually re-enroll these employees using the *Update Course Enrollments* function or automatically re-enroll them by pressing F17 on the Create Course Enrollments screen.

After you re-enroll the employees or if re-enrollment is not required, you should delete any non-attendance records from the course attendance list, using option **4** and pressing Enter.

Deleting Training History for Non-Employees

If you enrolled or entered attendance for non-employees, you must not delete their course attendance records. Since they are not employees and do not have employer and employee numbers in the system, the system cannot create normal training history records for them. Their course attendance records, therefore, serve as their training history. You can view these records when you use the *Display Non-Employees* function and then type **6** to select *Display Training* for non-employees.

When you use the *Display Course History* function to display who attended a particular scheduled course, the system uses both the employee training history and these non-employee course attendance records to build the display. For more information on this display function, refer to the “Printing Reports and Performing Inquiries” chapter.

Returning to a Completed Course and Adding More Attendance Records

If you overlooked some course attendance entries or incorrectly entered some, you can access a completed course and update attendance records. You can then generate more employee training history for these adjustments.

If you are using the F4 prompt on the *Start date* field on the first Update Course Attendance screen to select a completed course, you must first change the value in the *Include completed?* field to **1** and press Enter to include completed courses in the display.

Chapter 9 Creating Training History

9

This chapter explains the different methods available to create employee training history, how you can view this history on line, and how the system uses this history.

The chapter consists of the following topics:

Overview of Training History

This chapter provides you with information about the different methods available to create employee training history, how to view this history, and how the system uses this history.

Creating training history is the fourth and final stage of the training cycle. This stage follows the creation of training requests, course enrollments and course attendance.

Unlike the three preceding stages, creating training history is a required stage. You must create training history records in order to make meaningful use of the system.

The three methods available to create training history are:

- Create training history directly from training requests.
- Generate training history from course attendance records.
- Manually enter training history.

Each of these methods is suitable for different types of training.

You use this method when the training for an existing training request record that is used to track the training requirement has been satisfied or completed.

For example, an employee needs to be trained on the use of a particular piece of machinery or needs to watch a training video. If that training is completed on a one-to-one basis, either by an instructor or video player, there is no need to schedule a course and enroll only one employee. Instead, you by-pass the course enrollment stage and create training history directly from the request record.

This method is also useful when an employee attends an external training course. You use the training request to track the need for the external training and, when the employee has successfully completed the training, you create the training history directly.

In the *Update Training Requests* function you select a training request with option **6**. The system displays a screen that prompts you to complete the remaining fields for the history record. Only the *Start date* field is required.

After you press F3 to exit and confirm, the system creates the employee training history. The system automatically deletes the training request since it serves no further purpose.

Generating Training History from Course Attendance Records

This method is designed for internal classroom-based training where you have scheduled a course, enrolled employees, and confirmed their attendance.

In the *Update Course Attendance* function, you use F15 to automatically generate training history for all employees who attend a course. For more information, refer to the “Working with Course Attendance Records” chapter.

Entering Training History Records Manually

This method is suitable for recording ad hoc individual training where there was no training request and you want to record the fact that the employee received the training. You can also use this method to enter the history of an employee’s training received prior to your installation of Infinium TR. For more information on this method, refer to the “Manually Entering Training History” section that follows this overview.

Use of Training History

Training history is an integral part of Infinium TR. The training history records prove that employee training took place. This is vital in many areas of business, such as in Quality Management systems (ISO9000) or in regulated industries, such as food and pharmaceutical companies.

When you use the *Display Employee History* function, the system displays all the employee’s training records, allowing you to see an overall picture of his or her training. You can then view more details of a specific course, such as the instructor, the course sessions and, if applicable, the employee’s actual test results.

The *Display Course History* function allows you to view all the completed scheduled courses. You can select a course and view all the employees who were trained in that course. Complete information on the course is also available.

Training history provides a means of identifying employees who have not received training in a particular course. You can print or display information for untrained employees.

You can also use training history to identify when refresher training is due by looking at the date employees were last trained in that course.

Training History Information Related to Refresher Courses

When you create training history for an employee using any of the three methods, the system deletes the employee’s training request as well as enrollment and attendance records for that course. When appropriate, based on the *Frequency* field on the course master record, the system generates a new training request record for an employee refresher course.

Entering Training History Manually

Overview

To manually create an employee training history record, you must enter a course ID code, a course start date and a course location. The course ID code must exist as a valid course in the course catalog. The course start date is required, but it can be any date. The date does not have to exist as a scheduled course date. The course location that you enter must exist as a valid course location code.

Creating Training History Manually

Complete the following steps to enter and create employee training history using the *Update Employee History* function:

1. From the Infinium TR main menu select *Training History*.
2. Select *Update Employee History* [UEH].
3. Enter the identifier for the employer and employee.
4. Press Enter. The system displays a screen similar to the screen shown in Figure 9-1.

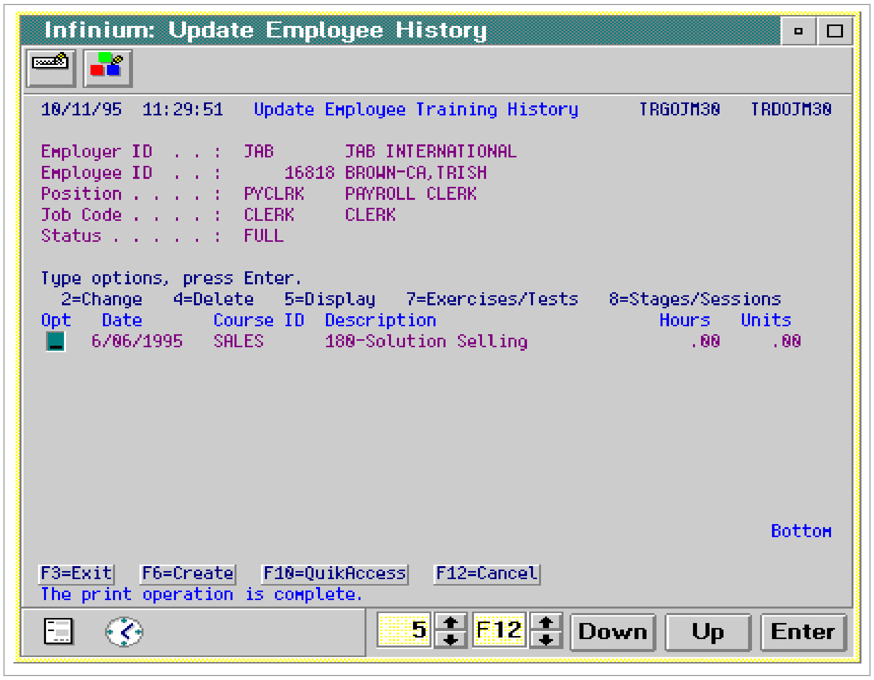


Figure 9-1: Update Employee Training History screen

This screen lists all courses that the specified employee has completed. The system displays this information in descending date order with the most recent training first. You use this screen to do the following:

- Create a new training history record by pressing F6
- Update a training history record by selecting that record with **2**
- Delete a training history record by selecting that record with **4**
- Display a training history record by selecting that record with **5**
- Update exercise and test results for a training history record by selecting that record with **7**
- Update session and stage information for a training history record by selecting that record with **8**

If you select a training history record with **2** and press Enter, the system displays the selected training history record. If you press F16, the system displays the Record Last Updated window, similar to the window shown in Figure 9-2.

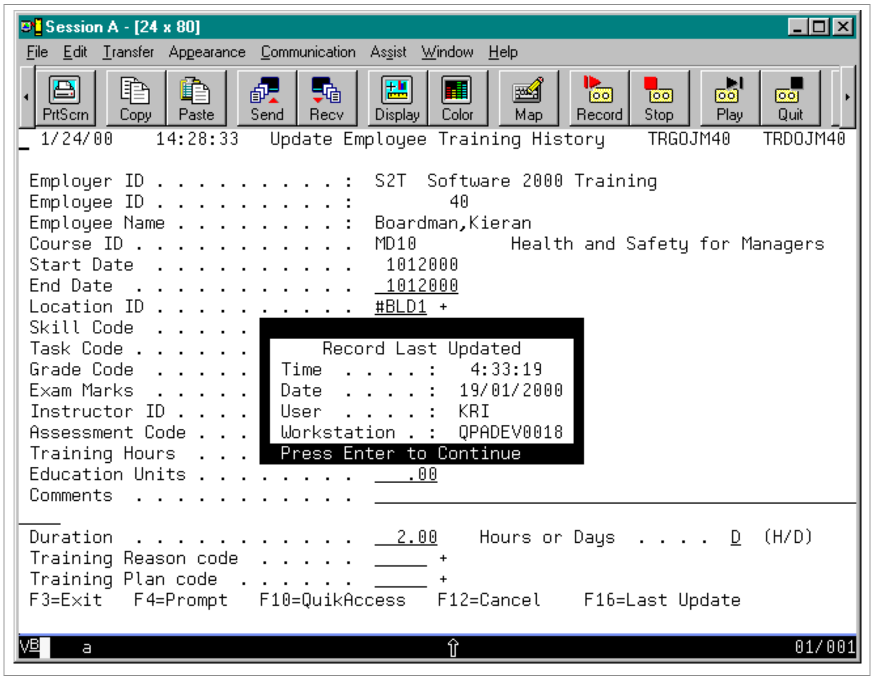


Figure 9-2: Record Last Updated window

This window shows the user ID and workstation of the user who last updated the record, as well as the date and time of the last update.

You can press Enter to continue updating employee training history and then return to the Update Employee Training History screen, such as the screen shown in Figure 9-1.

5 Press F6 to create a new history record. The system displays a screen similar to the screen shown in Figure 9-3.

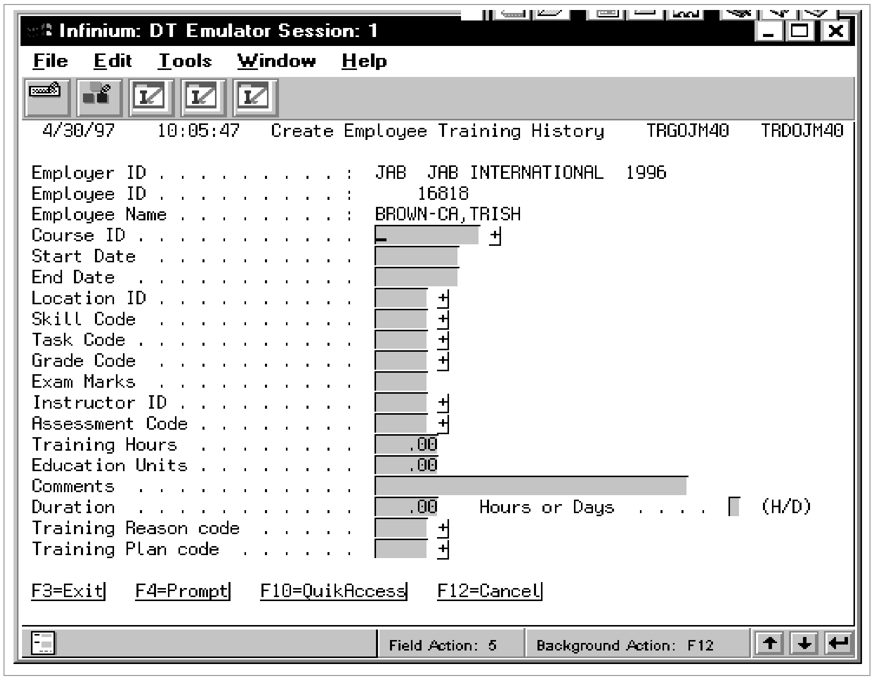


Figure 9-3: Create Employee Training History screen

Use this screen to enter the employee's course history information. The *Course ID, Start Date* and *Location ID* fields are required. You cannot enter future dates into the date fields.

6 Use the information below to fill in the fields on this screen.

Training Plan code

Use this field to enter the code value that identifies the training plan associated with the record whose history you are creating.

7 After you complete your entries, press F3 to exit and save this information to the history file.

If a training request exists in the employee record for the course you specified on the Create Employee Training History screen, Infinium TR gives you the option to delete this training request. The system displays an option window, similar to the window shown in Figure 9-4.

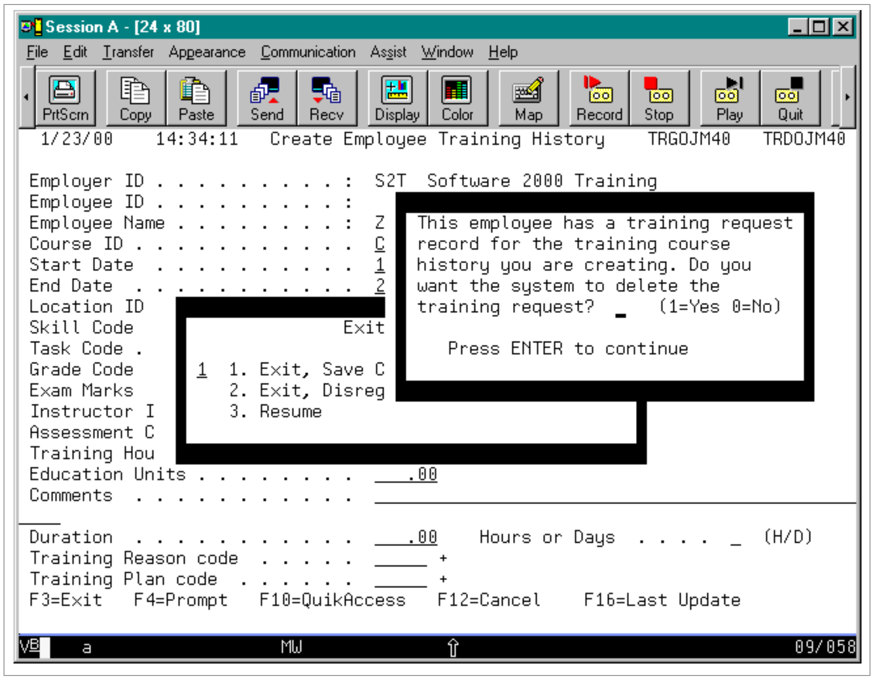


Figure 9-4: Create Employee Training History screen – delete training request

Use the option window on this screen to do the following:

- Type **1** to delete the training request, or type **0** if you do not want to delete the training request.
- Press Enter to continue saving the entries you have created for employee training history.

If appropriate, you should now update employee costs or costs for external delegates. Once training history records are complete, the system generates training requests for refresher courses for the employee if they have been defined in the system for the course the employee completed.

Notes

Chapter 10 Managing Training Costs

10

This chapter includes the tasks you perform to administer training cost information for employees, courses, and external delegates (non-employees).

The chapter consists of the following topics:

Overview of Training Costs

The *Costs* functions that produce training cost information include:

- Update *Employee Costs*
- *Update Course Costs*
- *External Delegate Costs*

The system can automatically create cost records of course fees for each employee when you use the *Update Course Attendance* function to create employee training history. To automatically create cost records, course fees and a cost code must exist on the course's master record.

The system creates cost records automatically in one of two ways depending on the value in the *Fee Type* field on the course master.

- If the value in this field is **1**, the system creates a cost record for the employee for the full amount of the course fee.
- If the value in the *Fee Type* field is **2**, the system creates a cost record for the employee with a prorated amount of the total course fee based on the number of employees trained.

Code values for the **TCS** (Training Cost Type) code type must exist before you can create training costs. Values for the **CUR** (Currency), TPS (Training Cost Payment Status) and the **TC7** (Training Costs User-Defined) code types are optional, but may be required at your site.

Objectives

After completing this chapter you should be familiar with how to:

- Enter and update training cost information in Infinium TR
- Associate training costs with a course, an employee, or an organizational level
- Associate costs with external delegates. External delegates are persons who attend training although they are not employees of your company.

Creating and Updating Employee Costs

Entering Employee Costs

Complete the following steps to record employee costs:

1. From the Infinium TR main menu select *Costs*.
2. Select *Update Employee Costs* [UEC]. The system displays a screen similar to the screen shown in Figure 10-1.

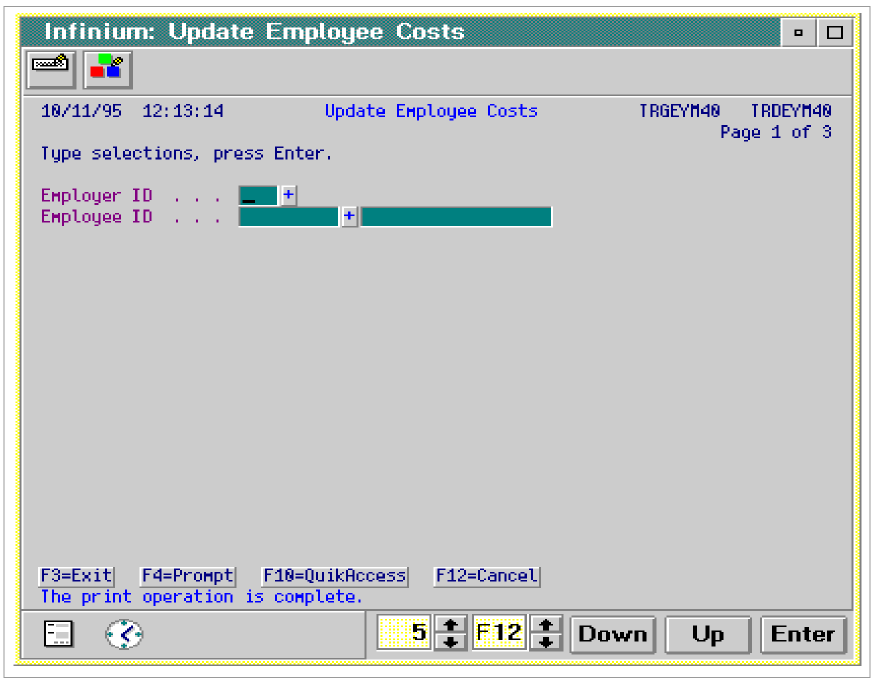


Figure 10-1: Update Employee Costs screen 1

Use this prompt screen to identify the employee whose training course costs you are creating or updating.

3. Type identifiers in the *Employer ID* and *Employee ID* fields.
4. Press Enter. The system displays a screen similar to the screen shown in Figure 10-2.

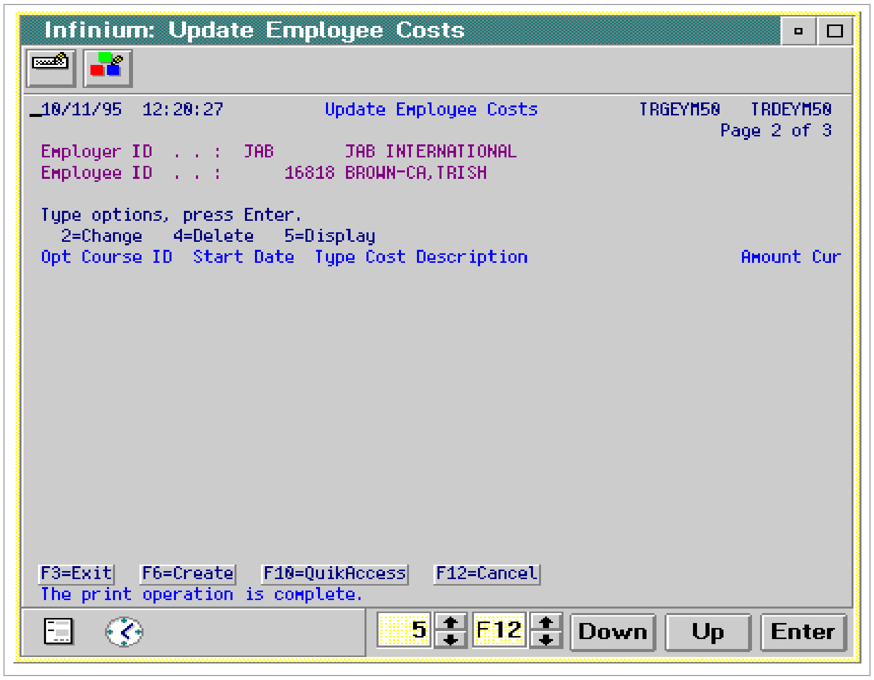


Figure 10-2: Update Employee Costs screen 2

This screen displays course cost information for the selected employee. You use this screen to do the following:

- Create a new training course cost record by pressing F6
- Update an employee training course cost record by selecting the record with **2**
- Delete an employee training course cost record by selecting the record with **4**
- Display an employee training course cost record by selecting the record with **5**

5 Press F6 to create a new employee cost record. The system displays a screen similar to the screen shown in Figure 10-3.

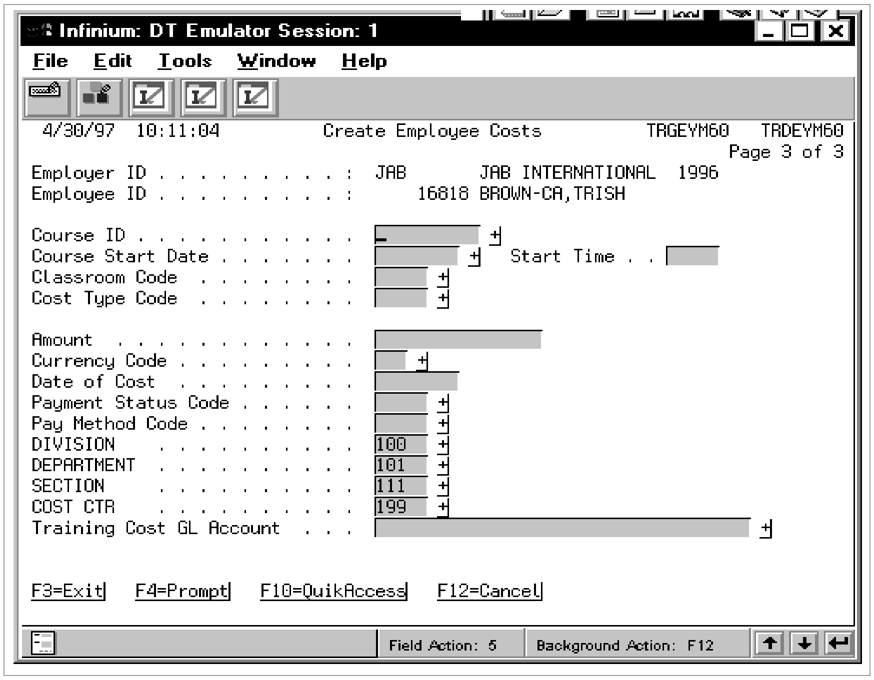


Figure 10-3: Create Employee Costs screen

Use this screen to enter training course cost information for the employee. You must type values in the following fields: *Course ID, Course Start Date, Cost Type Code, Amount* and *Date of Cost*. Employer levels default into the level fields, such as *Division* and *Department*. You can overwrite the level information.

You can enter a general ledger account number on the training cost record. If you enter an account number, the system validates your entry if you specified a general ledger interface program on the Entity Controls. If you are using Infinium General Ledger, this validation program is GLGAPI.

6 Make the appropriate entries and press Enter to validate your entries.

7 Press F3 to exit and save.

After you create employee costs, this information is available for cost analysis. You can use the *Display Course Costs* and *Print Course Costs* functions to analyze your employee training costs. You can determine the total cost of training for an employee for a particular department or type of course. For more information about these functions, refer to the “Printing Reports and Performing Inquiries” chapter.

Creating and Updating Non-Employee Costs

Entering Non-Employee Costs

Complete the following steps to record non-employee costs:

1 From the Infinium TR main menu select *Costs.*

2 Select *External Delegate Costs* [COSTEXT]. The system displays a screen similar to the screen shown in Figure 10-4.

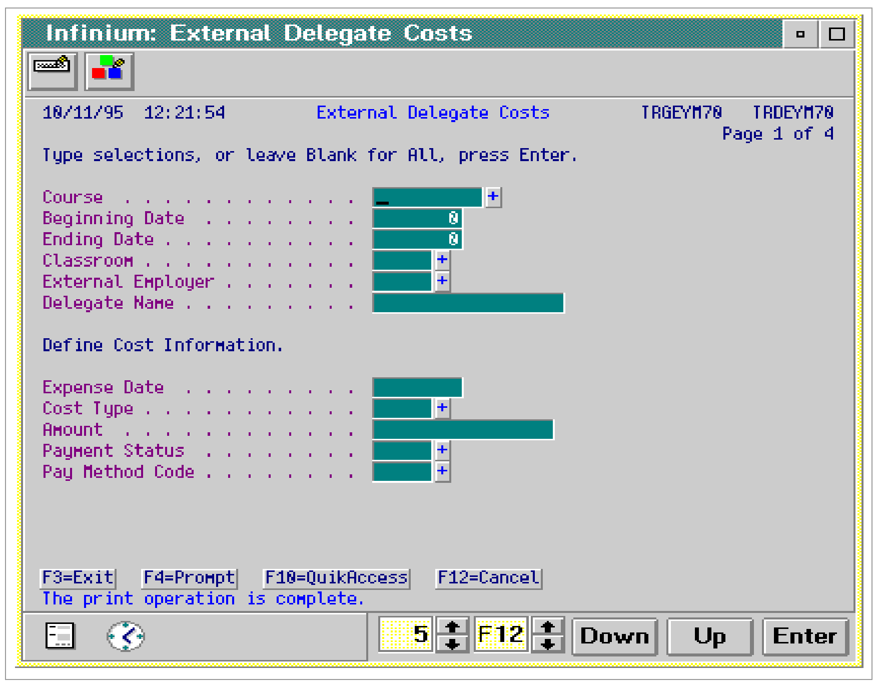


Figure 10-4: External Delegate Costs screen 1

All fields on this prompt screen are optional. This screen is divided into two sections.

- The top portion of the screen contains the selection criteria. The system uses this information to build a list of external delegates who have attended or who are enrolled in training courses.
- The bottom portion of the screen describes the cost information that the system uses when you create cost records during this session.

- You can apply the costs to a group of delegates or a single delegate.

3 Complete your entries.

4 Press Enter. The system validates the information you entered and then displays a screen similar to the screen shown in Figure 10-5.

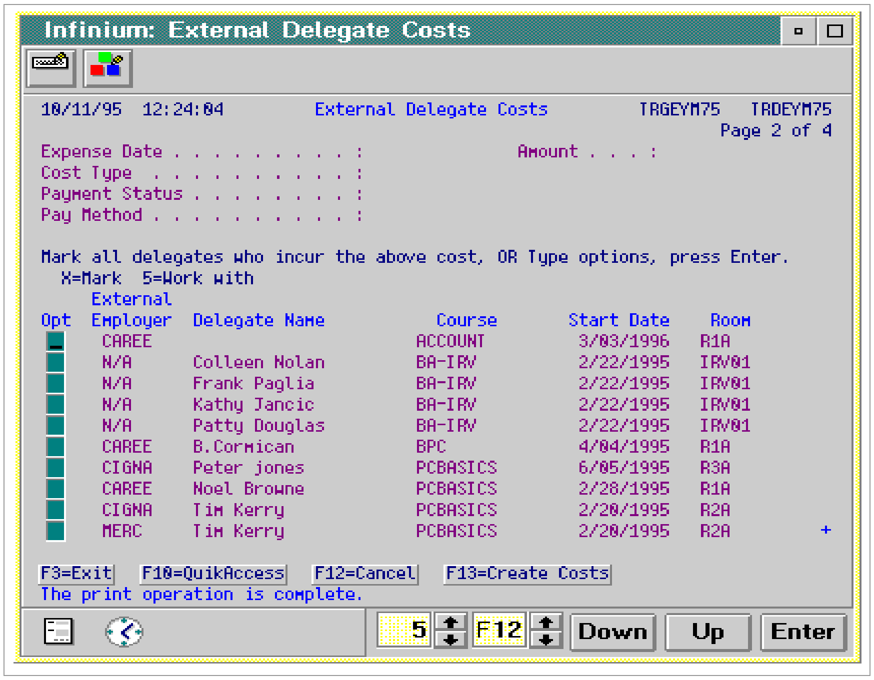


Figure 10-5: External Delegate Costs screen 2

This screen lists all external delegates who match the selection criteria you entered on the first screen and attended or are enrolled in courses. The list does not include any courses to which you are not authorized. For details on providing course security and on authorizing user access to course information, you can refer to the “Performing Supervisory Functions” chapter.

If an external delegate attended more than one course, more than one associated record exists in the list. The list is in alphabetical order by external delegate name for each external employer code.

You use this screen to do either of the following:

- Create course costs for specific external delegates using the criteria you entered on the first screen

  To do this select with **X** the external delegate(s) who incur the course costs and then press F13 to create costs for the external delegate(s) you selected. The system displays the following message: **Costs created for** (number of external delegates you selected with x) **external delegates.**

- Work with a specific external delegate's cost record by typing **5** next to the appropriate record

5 Select an external delegate with **5**.

6 Press Enter. The system displays a screen similar to the screen shown in Figure 10-6.

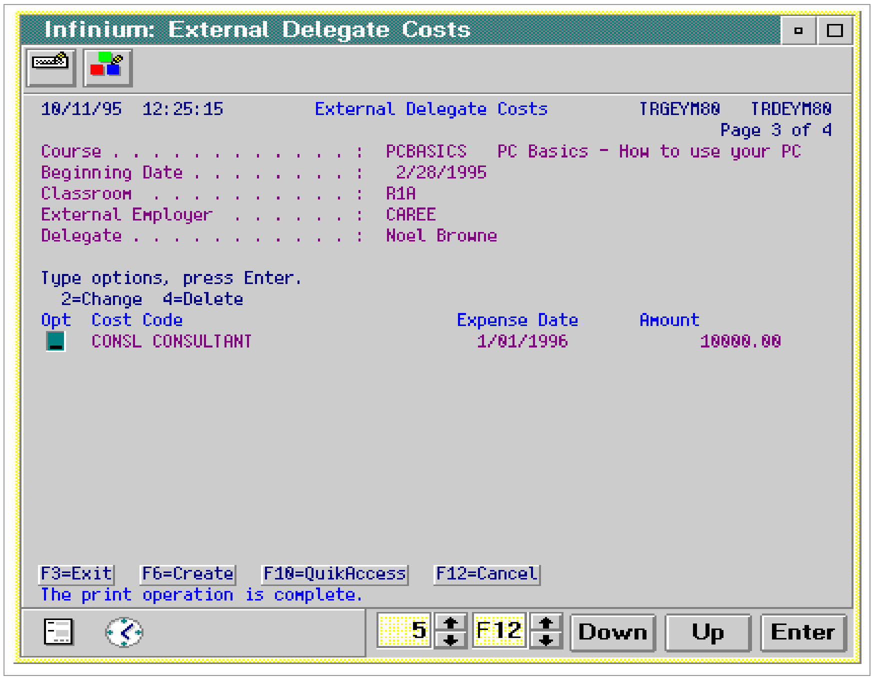


Figure 10-6: External Delegate Costs screen 3

This screen displays a list of the current costs already associated with the selected external delegate. You use this screen to do the following:

- Create a new training cost record for the external delegate by pressing F6
- Update (work with) a delegate's cost record by selecting it with **2**
- Delete a delegates cost record by selecting it with **4**

7 Press F6. The system displays a screen similar to the screen shown in Figure 10-7.

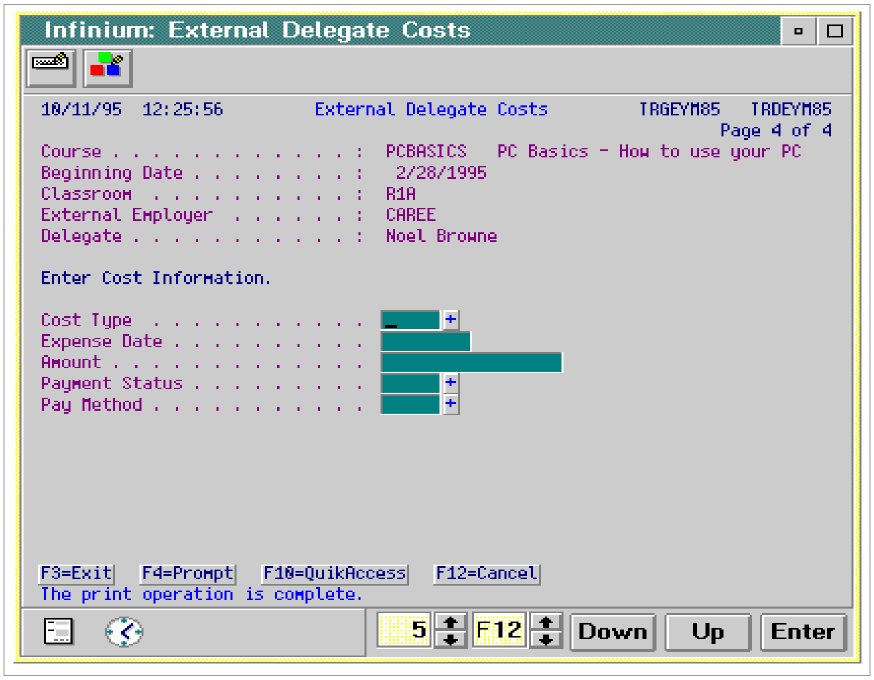


Figure 10-7: External Delegate Costs screen 4

The following fields are required: *Cost Type*, *Expense Date* and *Amount*. If you defined cost information on the first screen, the system defaults those values into these fields, which you can change if necessary.

8 Enter or update the information on this screen and press Enter to validate your entries.

9 Press F3 to exit and save.

After you create external delegate costs, this information is available for cost analysis. If you enter an external employer code as one of the criteria for selection, you can display and print external delegate costs if you use the *Display Course Costs* function and the *Print Course Costs* function. For more information on these functions, refer to the “Printing Reports and Performing Inquiries” chapter.

Creating and Updating Course Costs

Entering Course Cost Records

Complete the following steps to record course costs:

1 From the Infinium TR main menu select *Costs*.

2 Select *Update Course Costs* [UCC]. The system displays a screen similar to the screen shown in Figure 10-8.

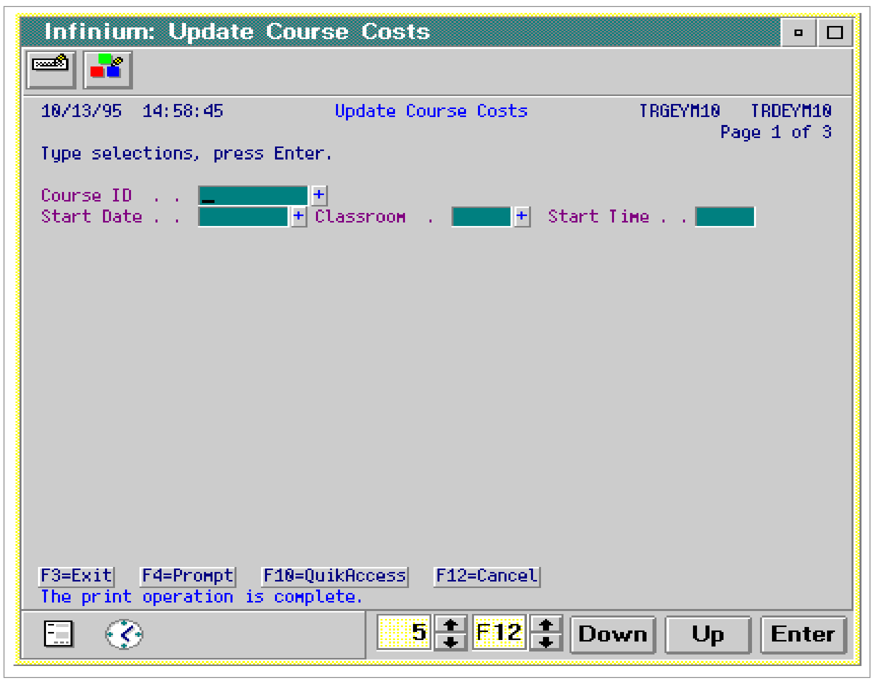


Figure 10-8: Update Course Costs screen 1

Use this prompt screen to identify the training course for which you are creating or updating costs.

3 Enter the course identifier in the *Course ID* field and the date in the *Start Date* field. When you press F4 to display a list of valid values and select a starting date value, the system provides the associated information for the *Classroom* and *Start Time* fields.

4 Press Enter. The system displays a screen similar to the screen shown in Figure 10-9.

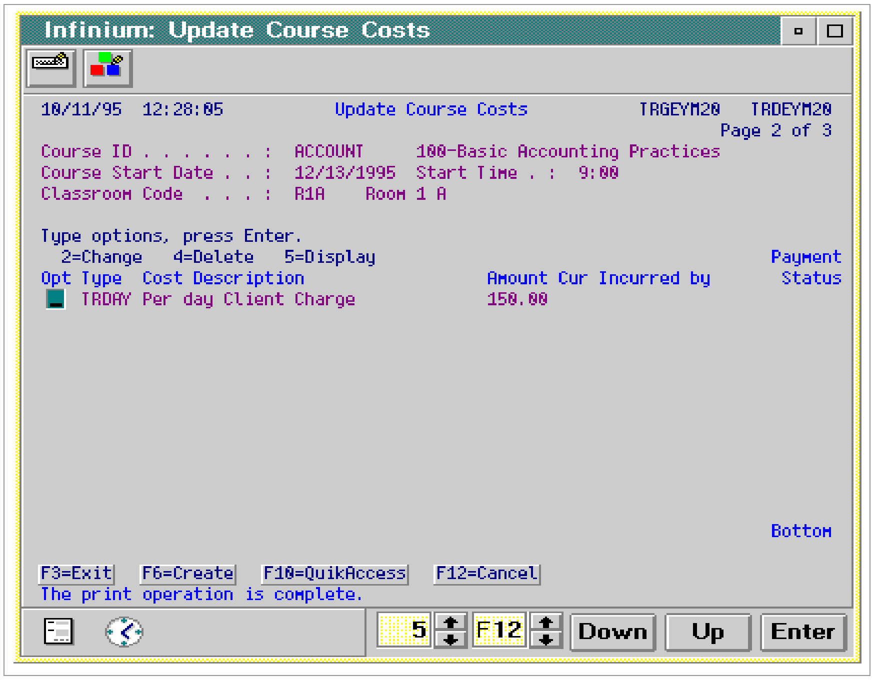


Figure 10-9: Update Course Costs screen 2

This screen lists existing cost records for the training course you specified on the previous screen. You use this screen to do the following:

- Create a new training course cost record by pressing F6
- Update a training course cost record by selecting it with **2**
- Delete a training course cost record by selecting it with **4**
- Display a training course cost record by selecting it with **5**

5 Press F6 to create a new course cost record. The system displays a screen similar to the screen shown in Figure 10-10.

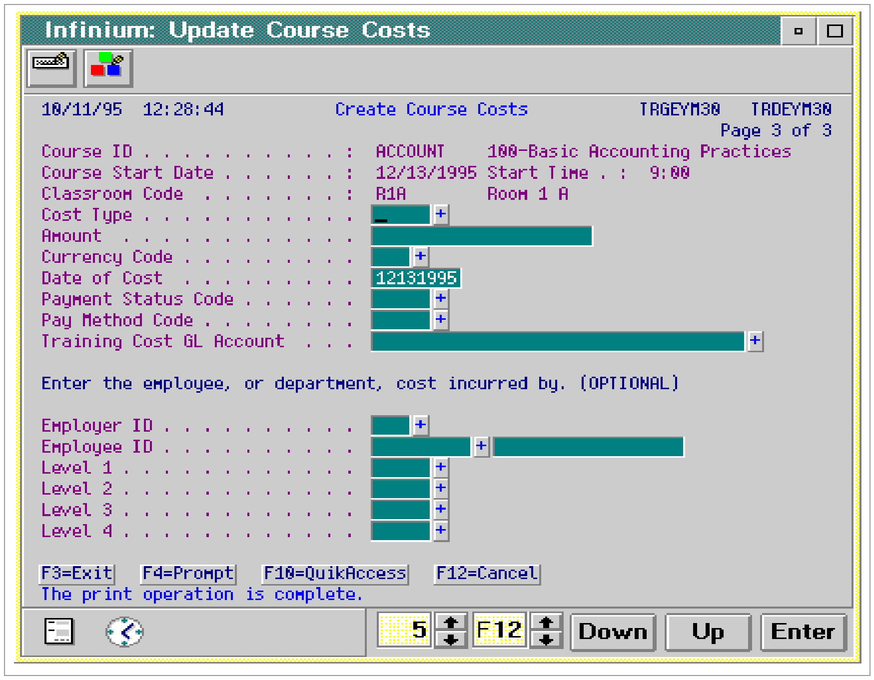


Figure 10-10: Create Course Costs screen

Use this screen to enter training course cost information. The *Cost Type* field is required.

6 Complete your entries on this screen.

Based on your entries, the system associates costs with either the specific employee or the organizational level.

For example, to enter a cost against a particular department, leave the *Employer ID* field blank and type the appropriate organizational level in the *Level 1*, *Level 2*, *Level 3* or *Level 4* field. If you do not make entries for either an employee or an organizational level, the system associates the costs you enter with the course itself.

7 Press Enter to validate your entries.

8 Press F3 to exit and save.

You can print or display training cost information for analysis of training course costs. For more information on these functions, refer to the “Printing Reports and Performing Inquiries” chapter.

Chapter 11 Printing Reports and Performing Inquiries

11

This chapter provides information on the reports and inquiries that are available in Infinium TR.

The chapter consists of the following topics:

Overview of Reports and Inquiries

In addition to printing Infinium TR reports, you can use Infinium Query to produce reports that you design and format to meet the needs of your company.

If you are using Infinium Query, refer to the following two documents:

- *Guide to Infinium Query*
- *Infinium Query Security Guide*

Objectives

Infinium TR provides the capability to print a variety of reports as well as the capability to view some of this information on line. After you complete this chapter, you should be familiar with how to access the displays and print the reports.

Printing Reports

Infinium TR provides the following reports.

Codes

Print Codes [PCODES], found in *Codes* in *Master Files*, lists code type information. You can print all code types, their code values and their definitions. Or, you can specify that you want to print information for a single code type.

Course Locations

Print Locations [PL], found in *Course Locations* in *Master Files*, lists location information. You can print the report for all locations. Or, you can specify that you want to print the list for a single location.

Course Providers

Print Course Providers [PCP], found in *Course Providers* in *Master Files*, lists course provider information. You can print the report for all course providers. Or, you can list the providers for a specific course. You can also include details for scheduled dates and completed courses.

Training Group Courses

Print Training Group Courses [PRTTRGGRP], found in *Training Group Courses* in *Master Files*, lists the courses in a training group. You can print the report for all training groups. Or, you can specify that you want to print the courses in a single training group. You can specify that you want each training group's information to begin on a new page.

Training Courses

Print Courses [PC], found in *Courses* in *Course Catalog*, lists course information. You can print the report for all courses. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Course ID
- Location ID
- Category Code
- Course Type Code
- Study Type Code
- Internal or External
- Status
- Beginning and ending course creation dates

This report includes complete descriptions of all codes, which enables managers or employees to view meaningful text. The report also lists the sessions defined for the course and all instructors able to teach the course.

Exercises or Tests

Print Exercises/Tests [PET], found in *Exercises/Tests* in *Course Catalog*, lists test and exercise information. You can print the report for all tests and exercises. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Course ID
- Exercise/Test

You can include a list of competency levels in the report.

Course Schedules Report

Print Course Schedule [PS], found in *Course Scheduling*, lists course schedule information, such as start and end dates, start and end times, maximum and minimum allowed places, and number of enrollments. You can print the report for all course schedules. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Course ID
- Course Date
- Classroom

You can include completed courses, sessions and stages on the report.

Classroom Schedules

Print Classroom Schedule [CLASSSCHED], found in *Course Scheduling* and also in *Calendar Functions*, lists by classroom the details of scheduled courses. You can print the report for all classrooms. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Classroom Code
- Beginning and Ending Dates
- Location Code
- Course ID

You can include details of the equipment scheduled for use in the course. You can specify that you want each classroom's information to begin on a new page.

Instructors

Print Instructors [PI], found in *Instructors*, lists instructor information. You can print the report for all instructors. Or, you can specify that you want to print the list for a single instructor in your organization.

You can specify that you want to list the courses which the instructors are authorized to teach.

Scheduled Courses

Print Scheduled Courses [SCHCRSP], found in *Instructors*, lists by instructor the details of scheduled courses. You can print the report for all instructors in your organization. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Beginning and Ending Dates

- Location Code

You can specify that you want each instructor's scheduled courses to begin on a new page and to include or exclude completed courses.

Instructor Assignments

Print Instructor Assignments [PIA], found in *Instructors*, lists your organization's instructor assignments. You can print the report for a specific course.

Training Requests

Print Training Requests [PN], found in *Training Requests*, lists training request information. You can print the report for all training requests. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Course ID
- Employer
- Required by Dates
- Reason Code
- Action Code
- User-defined code

Training Requests by Level

Print Training Requests by Level, found in *Training Requests*, lists training request information by level. You can print the report for all training requests. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Employer
- Level 1
- Level 2
- Level 3
- Level 4

- From date
- To date
- Course type
- Course category
- Course
- Reason code
- Action code
- Employee Location
- Enrolled Employees
- Employees who attended the course
- Employees who completed the course

Mass Refresher Requests

Mass Refresher Requests - Trial [MNRT], found in *Training Requests*, allows you to simulate the mass creation of requests for refresher training by printing a trial list of all employees for whom refresher training requests would be created. For more information about this topic, refer to the “Creating Training Requests” chapter.

You must type values in the following fields: *Effective Date*, *Requested By* and *Reason Code*. You can print the report for all refresher training requests. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Course ID or Training Group
- Employer ID
- Employee ID
- Levels 1, 2, 3, 4
- Action Code
- User-defined Code

You can use the list to review the projected requests for refresher training and, if they are not as required, you can make adjustments to the course frequency or to your report selections before you use the actual *Mass Refresher Requests - Create* function.

The *Mass Refresher Requests - Create* [MNR] function also provides the same report.

Mass Training Requests

Mass Training Requests - Trial [MNT], found in *Training Requests*, allows you to simulate the mass creation of training requests by printing a report listing all employees for whom training requests would be created, based on your selections. For more information about this topic, refer to the “Creating Training Requests” chapter.

You must type a value in the following fields: *Required by Date*, *Course ID* or *Training Group*, *Requested By*, and *Reason Code*. You can specify that you want to print the list based on any or all of the following criteria:

- Employer ID
- Employee ID
- Levels 1, 2, 3, 4
- Employees in Training Group
- Action Code
- User-defined Code

You can also exclude trained employees from the list.

You can use the list to review the projected training requests and, if these are not as required, you can make adjustments to your report selections before you use the actual *Mass Training Requests - Create* function.

The *Mass Training Requests - Create* [MN] function also provides the same report.

Enrollments

Print Enrollments [PE], found in *Employee Enrollments*, lists enrollment information. You can print the report for all course enrollments. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Course ID
- Course Date
- Classroom
- Course Location

You can also include completed courses in the report.

Enrollments by Level

Print Enrollments by Level (ENLEVP) found in *Employee Enrollments*, lists employee enrollments by organization level.

Mass Trial Enrollments

Mass Enrollments Trial [MET], found in *Employee Enrollments*, allows you to simulate the mass creation of course enrollments for employees based on their current outstanding training requests. This function prints a report of all the employee course enrollments that would be created.

You must type values in the following fields: *Effective Date*, *Requirement Date*, *Enrolled By* and *Status* (Confirmed or Provisional). You can specify that you want to print the list based on any or all of the following criteria:

- Course ID
- Employer ID
- Employee ID
- Levels 1, 2, 3, 4
- User-defined Code
- Training Group
- Action Code
- User-defined Code

You can use the list to review the projected enrollments and, if these are not as required, you can make adjustments to the training requests or to your report selections before you use the actual *Mass Enrollment* function.

The *Mass Enrollment* function also provides the same report.

Course Sign-in Sheets

Print Course Sign-in Sheets [PCS], found in *Employee Enrollments*, prints sign-in sheets for courses. The sign-in sheet lists all the employees enrolled in the course with space next to each name for a signature to verify attendance.

You can print sign-in sheets for all courses. Or, you can specify that you want to print sign-in sheets based on any or all of the following criteria:

- Course ID
- Classroom Code
- From and To Course Dates

You can include employees who are confirmed, provisional, and on a waiting list for the course. You can also suppress employee numbers from printing on the sign-in sheets. If the office phone and location are available on the employee record, that information defaults from Infinium HR.

Course Non-attendance

Print Non Attendance [PRTNOATTEND], found in *Attendance*, prints a list of all employees who did not attend the specified course or all courses. You can print the report for all completed courses. You can also specify to print the report based on any or all of the following criteria:

- Course ID
- Course Date
- Classroom Code
- Course Location
- Enrollment Status

Course Attendance History

Print Course Attendance History [PCAH], found in *Training History*, prints a list of all employees who completed courses. You can print the report for all courses. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Course ID
- Classroom Code
- Location ID
- Category Code
- Study Type Code
- From and To Start Dates

This report can also include non-employees who completed courses. Because non-employees, or external delegates, are set up for external employers, the report lists the external employer code and the non-employee name with no associated employee number.

Employee History

Print Employee History [PRTEEHIST], found in *Training History*, provides a listing of all the training history of employees. You can print all training history for a particular employee. Or, you can specify that you want to print the report for all employees based on any or all of the following criteria:

- Employer or across all employers
- Levels 1, 2, 3, 4
- Employee
- From and To Dates
- Course Type
- Course Category
- Course

You can also include outstanding enrollments and outstanding training requests in the report. You can also specify that you want each employee's information to begin on a new page and whether you want to include inactive employees. You can specify the minimum organizational level at which to end one report page and begin another. You can specify to include employees with no training history records, enrollments or training requests.

Exercise or Test

Print Exercise/Test Results [PETR], found in *Training History*, prints a list of all exercise and test results associated with a course. You are required to type a value in the *Employer ID* field. You can print the report for all courses. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Course ID
- Exercise/Test ID
- Classroom Code
- From Course Start Date

- Employee ID

Untrained Employees

Print Untrained Employee List [PUEL], found in *Training History*, prints a list of all employees who have not received training. You can print the report for a specific course, all courses, or all courses in a training group. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Course ID or Training Group
- Prior To Date
- Employer ID
- Job Code
- Levels 1, 2, 3, 4
- Employees in Training Group

You can also exclude employees who are currently enrolled or exclude employees who have a current training request for the course.

When you specify a training group rather than a course, the system prints two separate reports. The first lists untrained employees by course. The second lists employees and any courses in the training group in which the employee has not been trained.

When you specify a training group as an employee selection, the system includes only those employees with that training group code on their basic data record.

The system does not list terminated employees on these reports.

Session or Stage Status

Print Session/Stage Status [PSSS], found in *Training History*, prints a list of the status of course stages. You can print the report for all courses. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Employer ID
- Employee ID
- Course ID

- Session/Stage Code

You can also include completed stages in the report.

Course Costs

Print Course Costs [PCC], found in *Costs*, prints a list of all costs associated with a course. You must select the order in which you want to print the course costs:

- Course, Start Date
- Cost Type, Course Start Date
- Cost Date
- Cost Type, Cost Date
- Employer, Employee
- Cost Amount

You can print the report for all costs. Or, you can specify that you want to print the list based on any or all of the following criteria:

- Course ID
- Start Date
- Course Type Code
- Pay Method Code
- Category Code
- Study Type Code
- Cost Type Code
- Payment Status Code
- Employer ID
- External Employer
- Employee ID and Name
- Levels 1, 2, 3, 4
- From and To Cost Dates
- Job Code
- Cost Amount Operator (LT, LE, GT, GE or EQ)
- Cost Amount

- Currency Code

Performing Inquiries

Infinium TR allows you to view information on line. You can view the following on-line information using the display functions and, in some instances, the update functions.

Course Locations

You can display course locations from *Update Course Locations* [UL], found in *Course Locations* in *Master Files*. Select with **5** the course location for which you want to display information.

Course Providers

You can display course providers from both *Display Course Providers* [DCP] or *Update Course Providers* [UCP], found in *Course Providers* in *Master Files*. Select with **5** (Display) the course provider whose information you want to display.

Entity Controls

You can display entity controls by simply selecting *Display Entity Controls* [DENTITY], found in *Entity Controls* in *Master Files*.

User-Defined Fields

You can display user-defined field information by simply selecting *Display User Defined Fields* [DUDF], found in *User Defined Fields* in *Master Files*.

Courses

You can display course information from *Update Courses* [UC] or *Display Courses* [DC], found in *Courses* in *Course Catalog*. Select with **5** (Display) the course for which you want to display information.

The display of course details consists of two screens. Complete descriptions of all codes are provided, enabling managers or employees browsing the course catalog to view meaningful text.

The *Display Courses* function also provides additional display options.

Use option **4** (Schedule) to display the schedule of a selected course. From this display you can display course enrollments, equipment allocated, and session details.

Use option **6** (Description) to display the complete course description. This is the text entered when you press F9 to expand text on the course *Description* field.

Use option **9** (Comments) to display any extended comments about the course. This is the text entered when you press F9 to expand text on the course *Comments* field.

Course Sessions and Stages

You can display course sessions and stages from *Update Sessions/Stages* [USS], found in *Courses* in *Course Catalog*. After you type a value in the *Course ID* field and press Enter, select with **5** the course session or stage for which you want to display information.

Course Exercises and Tests

You can display course exercises and tests from *Update Exercises/Tests* [UET] or *Display Exercises/Test* [DET], found in *Exercises/Tests* in *Course Catalog*. After you type a value in the *Course ID* field and press Enter, select with **5** the exercise or test for which you want to display.

Course Schedules

You can display course schedule information from both *Update Course Schedule* [US] or *Display Course Schedule* [DSPSCHED], found in *Course Scheduling*. After you type a value in the *Course ID* field and press Enter, select with **5** the course for which you want to display schedule information.

In addition to viewing training course data (option **5**), you can also view enrollments for the course (option **6**), stages and sessions (option **8**), and allocated equipment (option **9**).

If you are viewing the course schedule using the F4 prompt on the *Course Start Date* field, for example on the first Update Employee Enrollments screen, the default display does not include completed courses. To include completed courses in the listing, you must change the *Include Complete* field on the Display Courses screen from **0** (No) to **1** (Yes) and press Enter.

Instructors

You can display instructor information from *Update Instructors* [UI], found in *Instructors*. Select with **5** the instructor whose information you want to display.

Classroom Availability, Instructor Availability, Equipment Availability

For more information on these display topics, you can refer to the “Scheduling Courses” chapter.

Training Requests

You can display training requests from the *Update Training Requests* [UN] or the *Display Training Requests* [DN] functions, found in *Training Requests*.

In the *Update Training Requests*, function, type values in the *Employer ID* and *Employee ID* fields and press Enter. Select with **5** the training request whose information you want to display.

In *Display Training Requests*, enter a value in either the *Course ID* or *Course Masking* field. You also have the option of entering beginning and ending dates. After you press Enter, select a course with **5** to display its training requests.

The system displays the employee's levels (one through four), position title, and internal phone number. This information assists in locating or contacting employees in relation to their training requirements. The display also includes the name and telephone number of the employee's immediate manager (for example, the reports to position).

Employee Enrollments

You can display employee enrollments from *Update Enrollments* [UE], found in *Employee Enrollments*. After you type values in the *Course ID* and *Start Date* fields and press Enter, select with **5** the employee whose course enrollment information you want to view.

Employee History

You can display employee training history from both *Update Employee History* [UEH] or *Display Employee History* [DEH], found in *Training History*. The *Display Employee History* function has some additional display options. This is a very powerful inquiry that allows you to view an employee's training history, current training needs and requests, course enrollments, and the training group status.

Type a value in the *Employer ID* and *Employee ID* fields and press Enter. The system displays a list of the training history records of all employees.

Option **5** allows you to view the detail of the course the employee attended. The history displays in descending date order with the most recent training first.

Option **7** allows you to view the employee's actual test or exercise results for a course.

Option **8** allows you to view the employee's progress through a course's stages.

From the display, press F16 to view the employee's training status regarding all courses in the employee's current training group. The system displays a separate screen that lists all the courses in the training group. For each course the system indicates whether the employee attended the course, is scheduled to attend (is enrolled in) the course, has only a training request for the course, or if there has been no action to date.

Press F15 (Enrollments/Requests or Cancellations) from the main list of training history records for an employee to view a display of all current course enrollments and training requests on file for that employee.

Course History

You can display course history from *Display Course History* [DCH], found in *Training History*. Type a value in either the *Course ID* or *Course ID Masking* field and press Enter. The system builds a list of all completed scheduled courses for the course ID or course mask you entered.

From the initial display screen, you have the following options:

- Option **2** displays the employees who attended that course. The system uses the training history records generated from all sources, that is, from course attendance, training requests, or history entered manually. From this screen you can use option **5** to view all training history for a particular employee, option **7** to view exercise and test information for that employee, and option **8** to view stage progress.

  The system also includes in the display non-employees who were trained.

- Option **3** displays the scheduled course data.
- Option **7** displays exercises and tests. You can then use option **5** to display exercise or test information and option **9** to view competency lists.
- Option **8** displays session and stage information.
- F15 displays all employees who have not been trained in the course. The Display Untrained Employees screen displays all employees who have not been trained in the selected course. This list of employees is based on the search criteria defined on the previous screen. This option also provides a selection window to define a subset of the employees to display. The display of these untrained employees indicates if an employee has a current training request on file or is enrolled for a future course.

  This subset selection screen is displayed for both trained and untrained employees. After you press Enter, the system validates the information you entered and then selects employees matching the search criteria. You can view subsets by organizational levels and job code. For example, you can find all employees in a particular department who have not received training in that course. If you leave the selection criteria blank, the system selects all employees.

- F16 displays all employees who have ever been trained in this course and includes a subset feature for trained employees. After you press Enter, the system first displays a subset selection window. This allows you to view trained employees by organization levels or by job.

Employee Costs

You can view employee costs from *Update Employee Costs* [UEC], found in *Costs*. After you Type values in the *Employer ID* and *Employee ID* fields and press Enter, select a course with **5** to view the employee training costs.

Course Costs

You can view course costs from both *Update Course Costs* [UCC] and *Display Course Costs* [DCC], found in *Costs*.

In the *Update Course Costs* function, type values in the *Course ID* and *Start Date* fields and press Enter. Select with **5** the course for which you want to display costs.

The *Display Course Costs* function is a powerful inquiry that allows you to analyze your training costs in many different ways. For example, you can find the total cost of training for a particular employee, for a particular department, or for a type of course. The prompt screen provides many selection fields associated with a course. You are required to select the order in which you want to display the course costs. The following values are available for the *Select order* field:

1	Course, Start Date
2	Cost Type, Course Start Date
3	Cost Date
4	Cost Type, Cost Date
5	Employer, Employee
6	Cost Amount

You can display a list of all costs. Or, you can specify that you want to display costs based on any or all of the following selection criteria:

- Course ID
- Start Date
- Course Type Code
- Pay Method Code
- Category Code
- Study Type Code
- Cost Type Code
- Payment Status Code
- Employer ID
- External Employer (If you type a value in this field, you must leave the *Employer ID* and *Employee ID* fields blank.)
- Employee ID and Name
- Levels 1, 2, 3, 4
- From and To Cost Dates
- Job Code
- Cost Amount Operator (LT, LE, GT, GE or EQ)
- Cost Amount
- Currency Code

From the subsequent display of cost information, use option **5** to display detailed information for the selected record.

Notes

Chapter 12 Performing Supervisory Functions

12

This chapter provides information about the tasks that a supervisor or MIS person might perform.

The chapter consists of the following topics:

Overview of Supervisory Functions

The following table lists the suggested frequency for each of the supervisory functions:

Function	Frequency
Update Course Security	When there are new users of the system and when you add new courses to the system
Recalculate Course Availability	Following conversion or interface from another system
Delete Course	As necessary, but typically when you want to remove test data
Rename Course ID	As necessary
Load Training Groups	Following installation of Infinium TR if you have previously been using Infinium HR
Reorganize TR Files	Frequently but when there are no Infinium TR users logged onto the system
Purge Inactive Training Records	Periodically, to remove unwanted training records of terminated employees

Objectives

After you complete this chapter you should be able to update course security, recalculate course availability, delete courses, load training groups, reorganize training files and purge inactive training records.

Administering Course Security

Overview

Course security is a feature of Infinium TR that allows you to control which users can work with or access certain courses. You can give a user the authority to access only certain training courses and when you do, you restrict that user from accessing all other courses. Users can view and select only courses to which they are authorized.

You might use this feature if you have users located in multiple sites who access a centralized Infinium TR database. If some of your training courses are site-specific, you can set up course security so that users at one site see and work with only the courses relevant to their site.

You can grant a user authority to any set of training courses. The system provides several options to enter course authorization records for a user. These are designed to minimize data entry. You can enter a training group code and the system creates user authorizations for all courses defined in that training group.

You can use course masking and the system grants a user authority to all the courses that match the mask. For example, if you have set up your course codes with the prefix A to denote a specific location, when you enter the letter A as the course mask, you create authorizations for all courses beginning with A.

Finally, you can use the copy feature and the system copies one user’s security definition to another user’s security definition.

Establishing Course Security

Complete the following steps to establish course security:

1. From the Infinium TR main menu select *Course Security*.
2. Select *Update Course Security* [UCS].
3. The system displays a screen similar to the screen shown in Figure 12-1.

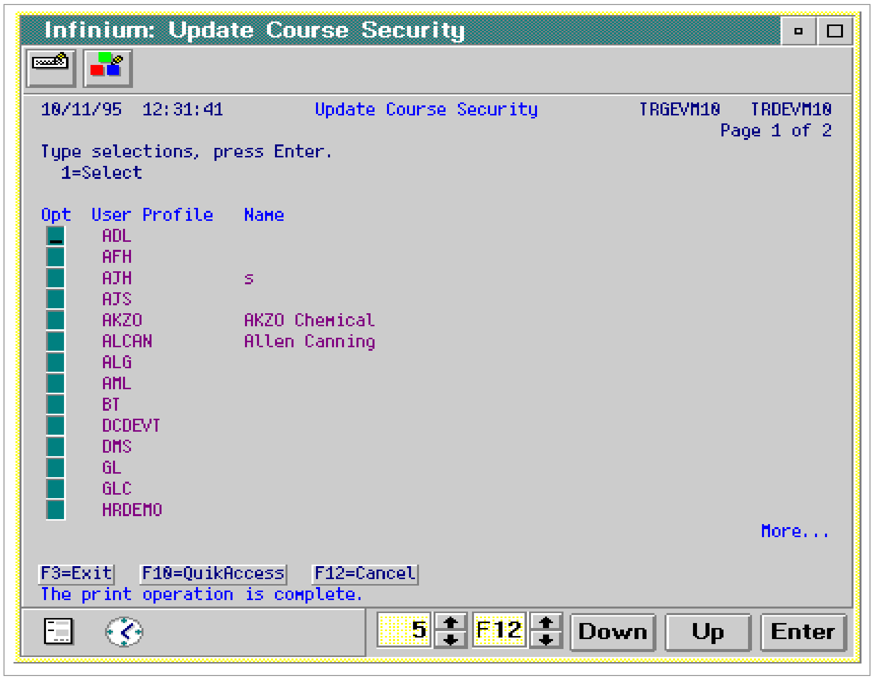


Figure 12-1: Update Course Security screen 1

This screen lists the user profiles for Infinium TR. Use this screen to select the profile to which you want to grant authority to one or more courses.

4 Type **1** next to the user profile to which you are assigning security.

You can select only those user profiles with a lower authority level than yours. For example, if your authority level is 6, you can define user profiles with an authority level of 1 through 5.

5 Press Enter. The system displays a screen similar to the screen shown in Figure 12-2.

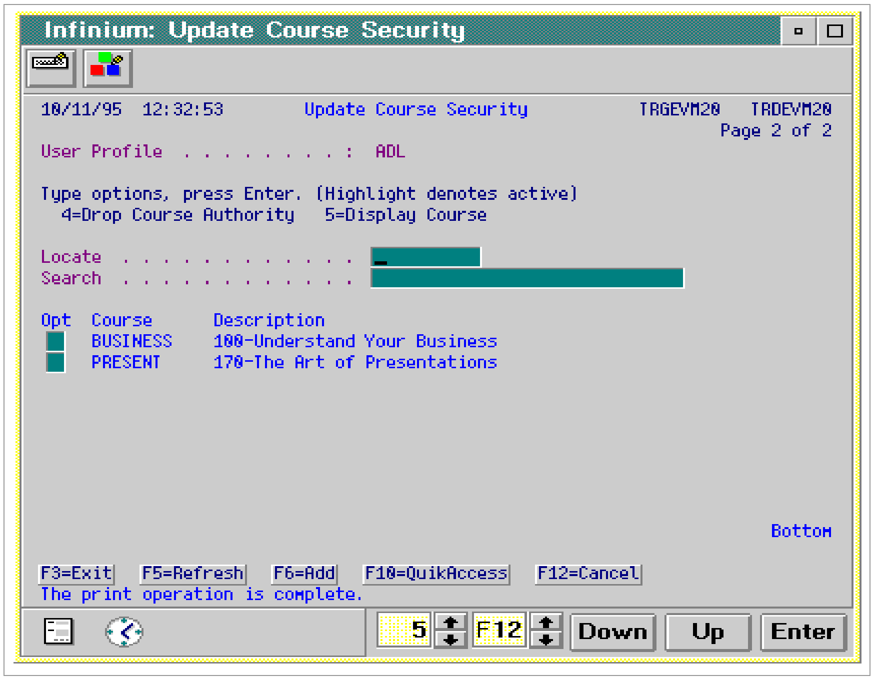


Figure 12-2: Update Course Security screen 2

This screen lists all training courses to which the user profile has authority. You use this screen to do the following:

- Add a course or courses to this user's authority by pressing F6
- Drop course authority by selecting the course with **4**
- Display information about a course to which the user has authority by selecting the course with **5**

6 Press F6 to enter security information for the specified user profile. The system displays the Create Course Security window, similar to the window shown in Figure 12-3.

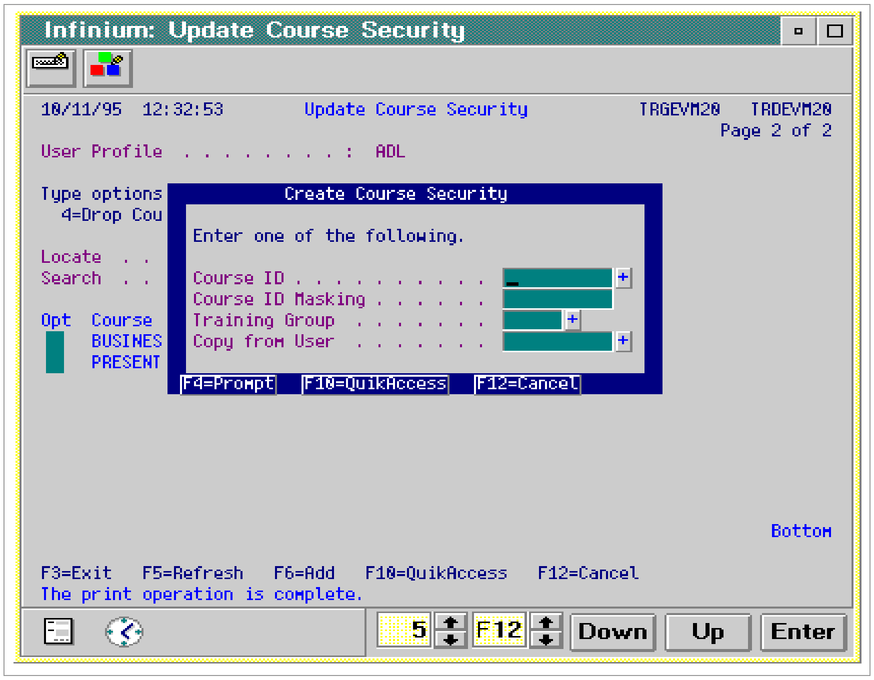


Figure 12-3: Create Course Security window

Use this window to enter information that specifies the courses a user can access. The identifiers you enter in this window identify only the courses to which the specified user has access. You must enter a value in one field in this window. You cannot, however, enter a value in more than one field.

The system limits user course authorizations to the records you create in this function. The system does not automatically update course security with changes you make elsewhere in Infinium TR. For example, if you enter a training group code to create the course authorization records for a user and you subsequently add some courses to that training group, the system does not update course security.

Similarly, if you use a course mask to create the entries and you subsequently define a new course master record with a code that matches the mask, the system does not automatically add it to course security. You must return to this function and re-enter either the training group code or new course. The system then creates the additional course authorization records.

7 Specify the courses the user can access by typing a value in one of the fields on this window. Use the following information to complete this window.

Course ID

Type the identifier of the course this user can access. Or, press F4 and select from the displayed list. After you press Enter the system adds this course to the user’s current authority.

Course ID Masking

Type up to ten characters in this field to serve as a mask. For example, if you offer three First Aid courses (First001, First002 and First003) and you type **First** in this field, the system adds all three classes to the user's current authority after you press Enter.

Training Group

Type the identifier of the training group this user can access. Or, press F4 and select from the displayed list. After you press Enter, the system adds all the courses in this training group to the user's current authority.

Copy from User

Type the profile of the user whose security definition you want to copy to this user's security definition. Or, press F4 and select from the displayed list.

8. Press Enter.

9. Repeat step 6 for every item this user can access. When you complete your entries, press Enter. After you press Enter, the system returns to the first Update Course Security screen.

10. Press F3 to exit to the *Course Security* menu.

Recalculating Course Availability

Overview

This function recalculates and updates the following course enrollment totals for each scheduled course:

- Number of employees and non-employees enrolled (by counting the number of enrollment records)
- Number of places still available (by taking the maximum places less the number of enrollments)
- Number of employees who are on the waiting list

This function insures the integrity of the number of people enrolled in courses. The system automatically calculates these totals correctly during the course enrollment process. However, you may need to use this function following conversion or interface from another system.

Recalculating Course Availability

Complete the following steps to recalculate course availability:

1. From the Infinium TR main menu select *Utilities*.
2. Select *Recalculate Course Availability* [RCA]. There is no screen associated with this utility. You simply press Enter after you select the function.

   The system performs the recalculation, which takes only a few seconds to complete.

   The system does not produce a report.

Deleting a Course

Overview

When you use this utility, the system deletes the course master record you specify and all its associated records; that is, it deletes all training records that contain the specified course identifier. These records are:

- Course Master
- Training Requests
- Scheduled Courses
- Allocated Equipment
- Course Sessions
- Course Enrollments
- Course Costs
- Employee Training History
- Course Security

The files listed above have their own facility to delete individual records. You find this delete facility, option **4**, on the appropriate update function. This is usually sufficient for normal record maintenance or correction of errors. To insure data integrity, however, you cannot delete a course master record if that course code is found in any of its associated files. The system displays an error window when you attempt this.

This *Delete Course* function provides a convenient method of removing all references to a course from Infinium TR. For example, you use this function if you used certain course codes for testing purposes and no longer require the data.

Exercise extreme caution when you use this function, which should be available only to the supervisory user.

Deleting a Course

Complete the following steps to delete all references to a course:

1 From the Infinium TR main menu select *Utilities*.

2 Select *Delete Course* [DELETECRSE]. The system displays a screen similar to the screen shown in Figure 12-4.

```
 9/12/02  15:51:38          Delete Course              TRGDLT10   TRDDLT10
                                                                Page 1 of 1
Type selections, press Enter.

  Course ID . . . . . . . . . .  __________ +


   Warning. This function will delete all training records that contain
            the selected course ID, including scheduled courses, training
            requests and enrollments, sessions, cancellations, equipment,
            exercises and tests









F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Figure 12-4: Delete Course screen

Use this screen to identify the course and associated records you want to delete.

3 Type the identifier of the course you want to delete.

4 Press Enter to submit this interactive job.

No report is produced.

Renaming a Course

Overview

Use this function when you need to assign a new name to an existing course and the associated records. When you use this function, the system renames all records associated with the original name including training requests, enrollments and history records. No references to the original name remain in the system.

Before you can load training groups, all positions with the appropriate training group code must be defined in Infinium HR. You use the *Update Organization* function to do this.

You should use this utility if you need to assign a new name to an existing course ID.

Renaming Course IDs

Complete the following steps to assign a new name to an existing course:

1. From the Infinium TR main menu select *Utilities.*
2. Select *Rename Course ID*. The system displays a screen similar to the screen shown in Figure 12-5.

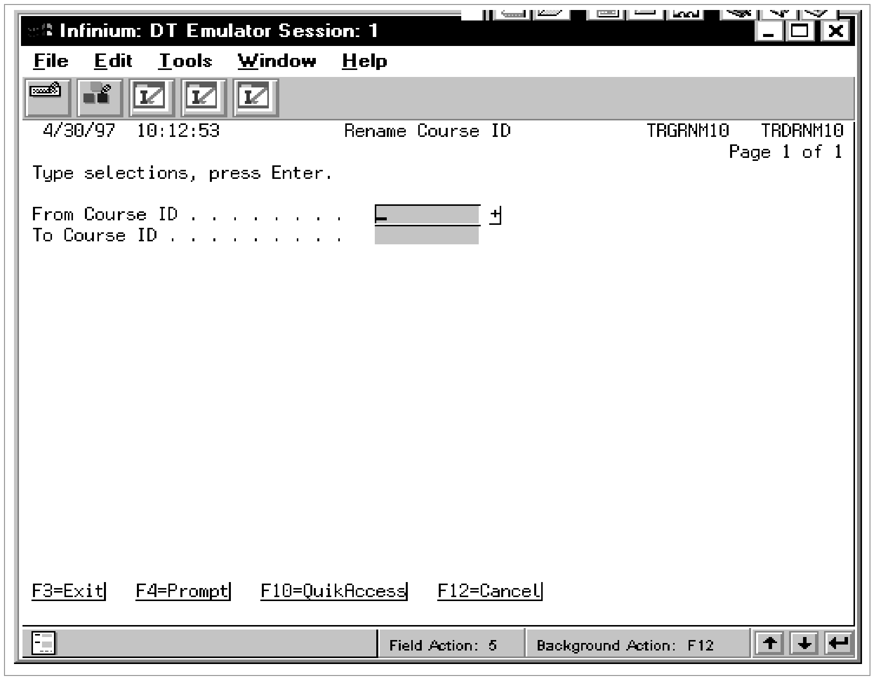


Figure 12-5: Rename Course ID screen

Use this screen to enter information for a new name for a course.

3 Complete the fields on this screen using the following field information:

From Course ID

Type the value that identifies the course to which you are assigning a new name.

To Course ID

Type the value you will use for the new name for this course.

4 Press Enter. The system interactively processes the course records and displays the following message:

Updating training records

Loading Training Groups

Overview

The primary purpose of this utility is to populate the *Training Group* field in the employee basic data record with the training group that is associated with the employee's position. The utility also provides the further option of mass creating training requests for the employees for all courses defined in the training group.

You also have the option of refreshing employee basic data. If you choose to do this, the system replaces any existing training group codes in the employee basic data. For example, during implementation you may decide to change the training group codes on your position records.

You normally run this utility once. After you install Infinium TR, the Infinium HR system automatically updates the training group codes for new employees and employees changing positions.

Before you can load training groups, all positions with the appropriate training group code must be defined in Infinium HR. You use the *Update Organization* function to do this.

You should use this utility if you have just installed Infinium TR and are already using Infinium HR at your site.

Loading Employee Training Groups

Complete the following steps to mass update employee training group codes:

1. From the Infinium TR main menu select *Utilities*.
2. Select *Load Training Groups* [LOADTRGGRP]. The system displays a screen similar to the screen shown in Figure 12-6.

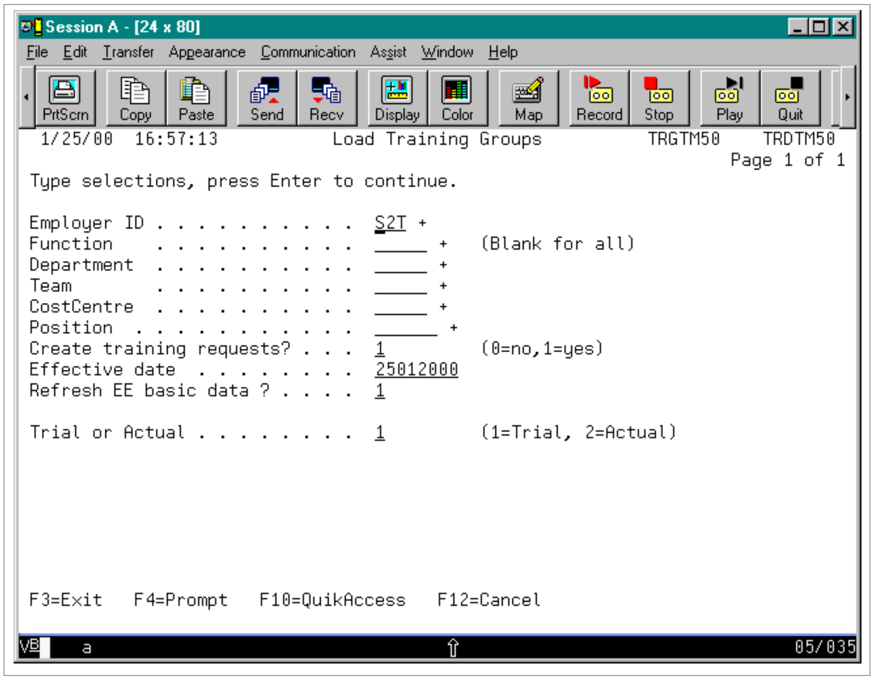


Figure 12-6: Load Training Groups screen

Use this screen to enter the parameters for loading training groups. The following fields are required: *Employer ID, Create training requests?*, and *Refresh EE basic data?*, *Trial or Actual*.

3 Complete the fields on this screen using the following field information:

Employer ID

You must enter the identifier for the employer whose records you want to update.

Levels 1, 2, 3 and 4

If you leave any or all of these fields blank, the system updates training group data for all groups in that level in the specified employer.

Position

If you leave this field blank, the system updates training group data for all positions in the specified employer.

Create training requests?

Type **1** (Yes) in this field to mass create training requests for the employees for all courses defined in the training group. Type **0** (No) in this field if you do not want to create training requests.

Effective date

If you have specified that the system should create training requests (you typed **1** in the *Create training requests?* field), you must type a date in this field. Otherwise, this is an optional field.

Refresh EE basic data?

Type **1** (Yes) in this field if you want the system to replace any previous training group code that may already be on the employee basic data record. Type **0** (No) if you do not want the system to update the *Training Group* field.

Trial or Actual

Type **1** in this field to run the report in trial mode so that you can view the training groups associated with each employee listed for the employer that you specified in the *Employer ID* field. When you confirm the information in trial mode, you can type **2** in this field to run this report in actual mode.

4 When all your entries are correct, press Enter to submit the batch job and have the system update the employee records.

The system produces a report of these updates.

Reorganizing Infinium TR Files

Overview

You should frequently reorganize all Infinium TR files on the AS/400 or iSeries to free the disk space taken up by deleted records. Infinium TR automatically deletes records in many functions. For example, when you create training history for employees, the system deletes training request records and enrollments. However, the deleted records remain on your AS/400 or iSeries. When you reorganize the files, the system physically removes deleted records from the disk.

You should run this function frequently. However, you can only run this function when there are no Infinium TR users logged onto the application.

Reorganizing Infinium TR Files

Complete the following steps to reorganize the Infinium TR files:

1. From the Infinium TR main menu select *Utilities*.
2. Select *Reorganize TR Files* [TRRGZ]. The system displays a screen similar to the screen shown in Figure 12-7.

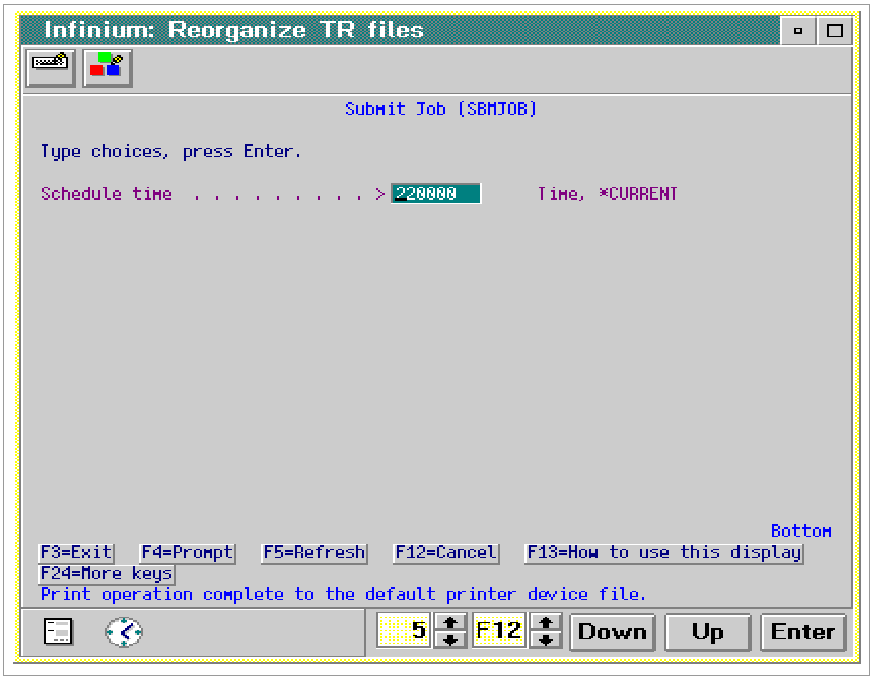


Figure 12-7: Submit Job (SBMJOB) screen

You use this screen to specify when the reorganize job should run.

3 Enter a value in the *Schedule time* field using the following field information.

Schedule time

Two options are available for this field. You can specify that you want to run this job as a normal batch job submitted at the current time. To do this, type ***CURRENT** in this field.

Or, you can delay the start of the job until later in the day by specifying the time of day you want to run this function on that day. To do this, you must use the 24-hour format. For example, if you want to run this function at 7:00 p.m. that day, type **190000** in this field. You can use a time separator. However, when you use a time separator, you must use the separator specified for the job.

Refer to the on-line Help for more information about this field. Press F13 for more information on how to use this display.

4 Press Enter to submit the job.

Purging Inactive Training Records

Overview

When you run this function, the system purges the training records of inactive and terminated employees. These records include training requests, enrollments, costs and history.

Infinium TR does not purge the training records of employees protected from purging with the *Keep Permanently* field in Infinium HR.

The main function to purge terminated employees is in Infinium HR. You must, however, first perform this associated purge in Infinium TR because the system assumes that the employee basic data records still exist in Infinium HR and it needs these records to identify the affected terminated employees. Since Infinium HR related purge function deletes the basic data records of terminated employees, perform the purge in Infinium HR after you purge employee information in Infinium TR.

Purging Inactive Training Records

Complete the following steps to delete the training records of terminated employees from the Infinium TR files:

1. From the Infinium TR main menu select *Utilities*.

2. Select *Purge Inactive Training Records* [DLTEE]. The system displays a screen similar to the screen shown in Figure 12-8.

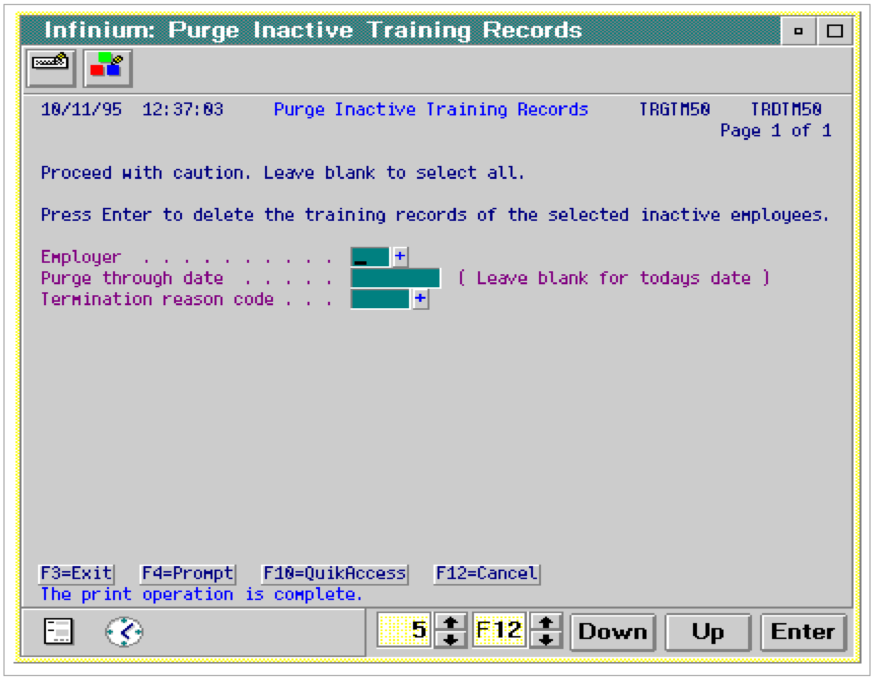


Figure 12-8: Purge Inactive Training Records screen

You use this screen to specify which terminated employee records the system should purge.

3 Type values in the fields on this screen to define the purge parameters or leave any or all these fields blank to purge all records associated with that field. If you leave all fields blank, the system purges all terminated employee records. Use the following information to complete the fields on this screen.

Employer

If you type a value in this field, the system selects employees who were terminated for a specific employer. If you leave this field blank, the system selects employees terminated for all employers.

Purge through date

Since you may not want to purge the training records of all your terminated employees, you can use this field to specify a termination date. The system purges only employees who were terminated prior to or on this date.

Termination reason code

If you type a value in this field, the system selects employees who were terminated for that reason. If you leave this field blank, the system selects employees terminated for all reasons.

4 Press Enter to submit the job and purge the records of terminated employees as specified.