DePaul’s WLP Enterprise Learning Guide – Training Administrator

Training Approvals, Queries, Updating Enrollment Status

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Getting Started

Request PeopleSoft Access to Become a Training Administrator
1. Navigate to this webpage:
   http://www.is.depaul.edu/systems/peoplesoft/index.asp
2. Click on PeopleSoft Access Request Form
3. Type in your campus connect username and pass
4. Type of Access: Click Revising
5. Enter your Employee information
6. Data Owner approval needed from:
   a. Check: Human Resources
7. PeopleSoft Application and Instance
   a. Check: SA/HR Production
   b. Check: SA/HR Quality
8. Description of Role(s) or Role(s) Name:
   a. Add: “Training Administrator” (Training Administrator)
   b. Add: “EL Enrollment Administrator” (Training Administrator and Enrollment Administrator)
   c. Add: “HR Query Training” (Training Administrator and Enrollment Administrator)

Enrollment Admins: Only request “EL Enrollment Administrator” and “HR Query Training” access
9. Skip to Submit
10. Press Submit
11. Print the Form
12. Both you and your manager must sign the form
13. Send the physical form via interoffice mail to the security lead of the appropriate department
   a. Send to Brandon Ciarlo at 14 E. Jackson, Suite 1300

Set up Outlook Rules and Alerts for Incoming Training Requests
1. Right-click inside your Mail Folders and select New Folder and create a new folder named Training Enrollment Requests.
2. Choose Tools, Select Rules and Alerts
3. Select New Rule…
4. Under Stay Organized click on Move messages with specific words in the subject to a folder, and click Next
5. Step 1: Select condition(s), click “with specific words in the subject” link

6. Enter: “Request requires processing for Course: (your departmental code)”, this code is provided by WLP, click Add, then click OK

7. Next click the “move it to the specified folder” link
8. Click the Training Enrollment Requests folder, then click OK and then Finish

Set up Rules and Alerts for Processing Emails
1. Right-click inside your Mail Folders and select New Folder and create a new folder named Ignore Processing Emails.
2. Choose Tools, Select Rules and Alerts
3. Select New Rule…
4. Under Stay Organized click on Move messages with specific words in the subject to a folder, and click Next

5. Step 1: Select condition(s), click “with specific words in the subject” link

6. Enter: “Request has been processed for Course”, click Add, and “Request requires processing for Course”, click Add, then click OK
7. Next click the “move it to the specified folder” link

8. Click the Ignore Processing Emails folder, then click OK and then Finish
**Set up the TrainingAdmin Calendar**

1. Open Outlook
2. Navigate to your Calendar
3. Click File>Open>Other User’s Folder
4. Type trainingadmin
5. Press OK
6. The trainingadmin Calendar should be added to the People’s Calendars section

7. You should be able to edit this calendar. Please test the calendar by creating an appointment with the subject line reading your name.

8. This appointment should then be visible to everyone with access to the trainingadmin calendar.
Submit the Course Request Form
To have your course added to the system please complete and submit the Course Creation Request Form.

1. Open the Course Creation Request Form. It can be found at [http://hr.depaul.edu/Workplace%20Learning/LearningAtDePaul/TrainingAdmin/index.html](http://hr.depaul.edu/Workplace%20Learning/LearningAtDePaul/TrainingAdmin/index.html) under the Creating and Updating Course Information heading.

2. Complete and Submit the Form

Enrollment

Login
1. Go to Campus Connect: [https://campusconnect.depaul.edu/](https://campusconnect.depaul.edu/)  
   a. Log-in
Approving Enrollment Requests

1. After participants enroll, the training admin will receive a Request requires processing email.
   a. Before clicking the email link—sign into Campus Connection
   b. Click the link provided in the email

2. The link will forward you to the Administer Request page
   a. Determine the appropriate Admin Action
      i. Select approve transaction and automatically update database
      ii. Select approve the transaction and manual update the database (see: Marking attendance then manually adding participants)
      iii. Select cancel transaction (will receive rejection reasoning from training administrator). Potential Reasons:
         - Repeat “No Shows”
         - Students
         - Non-DPU Employee
- Non-Manager for manager courses

b. Click Save

3. Save confirmation
a. Click OK

4. If registration in excepted then the Administrator Actions box will read **Status**: Success
5. **Best Practice:** Set up a corresponding Outlook appointment for the course and enter the participant’s name after they have registered through Campus Connect.

**Communication**

*Send Outlook Email Example (Best Practice):*

1. Send after training request is approved.
2. Resend a reminder one week before training.

**Note:** If your session details are changed or the session is canceled then please be sure to update your Outlook appointment.

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**Rosters and Reporting**

*Generating PeopleSoft Queries (Generate Rosters, Check Demographic Data, Enrollment and Attendance Status)—Preferred option for Course Rosters*

1. Click DePaul Human Resources System
2. Click **Reporting Tools** Menu

3. Click **Query Viewer**

4. Enter Query name for list of reports
   a. Click Search
   b. Choose appropriate report based on report description
   c. Click **Excel** to run query

5. Enter Course Code and Session Number (Enter % to include all sessions)
   a. Click View Results
   b. Select Open or Save
Adding and Updating Participants' Statuses

*Marking Attendance and Adding Participants by Course (Attendance: Enrolled, No Show, Canceled, Completed)*

1. Click DePaul Human Resources System

2. Click Enterprise Learning
3. Click **Student Enrollment**

4. Click **Enroll Individually**

5. Search for an existing value
   a. Find **Course Code** and **Course Session Nbr** Codes
   b. Click on the relevant course date
6. In the Course Session Enrollment
   a. Enter Empl ID and press enter
   b. Adjust the Attendance as needed
      i. Click the arrow to reveal the next student
      ii. Click View All on the top right for a complete list
   c. Click + to add more students
   d. Click – to remove student (Note: No records should be removed!)
   e. Click Save

Marking Attendance and Manually Adding Participants by Individual’s Record (Attendance: Enrolled, No Show, Canceled, Completed)
1. Click DePaul Human Resources System
2. Click Enterprise Learning

3. Click Student Enrollment

4. Click Enroll in Course
5. Search for an existing value  
   a. Enter the Empl ID or  
   b. the First Name and Last Name

Enroll in Course

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

- **Empl ID:** begins with
- **Empl Rcd Nbr:** =
- **Name:** begins with
- **Last Name:** begins with
- **Second Name:** begins with
- **Alternate Character Name:** begins with

- Case Sensitive
- Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

6. In the Course Student Enrollment
   a. Change the **Attendance** status of an existing enrollment
   b. Click + to add a course record
      i. Enter the Course Code. Press Enter.
      ii. Enter the Course Session. Press Enter.
      iii. Update the **Attendance** status
   c. Click – to remove a record (Note: No records should be removed!)
   d. Click the arrow to review individual training records
   e. Click View All for a complete list of records
   f. Press **Save** at the bottom of the page
Adding Additional Sessions to an Existing Course

Please use the Additional Course Session Request Form located at [http://hr.depaul.edu/Workplace%20Learning/LearningAtDePaul/TrainingAdmin/index.html](http://hr.depaul.edu/Workplace%20Learning/LearningAtDePaul/TrainingAdmin/index.html)

**Notes:**

*Usage of different attendance statuses:*

- **Enrolled:** Used as the default status when a training request is approved.
- **Completed:** Used after a participant has completed a course.
• Canceled: Used when participant informs the training sponsor that they will not be able to attend.
• No Show: Used when participant is absent with no advanced notice or explanation.

_Cancelations and Re-registration:_ Participants must contact the training administrator if they want to cancel their registration or move sessions.

Before a participant can re-register, their status must be manually canceled by the training administrator in one session if they wish to register for a different session of the same course.

_Course Rescheduling and Cancelations:_ All course cancelations or rescheduling must be reflected in the system. Please inform the Lead Training Administrator (HR) of any changes (trainingadmin@depaul.edu). Also, be sure to reflect these changes in your corresponding Outlook Appointment.

Use the Enroll in Course function to update an individual participant’s training record.

**Tools**

_Outlook Email Template_

_Dear Colleagues,

We look forward to your participation in (course name) on (day of the week), (month) (date) from (start time) – (end time) in the (building), (room) located at (address) on the (campus location) Campus.

(Materials) will be provided; however, we ask you to bring a pen and paper. (Any other pre-course requirements if necessary).

The workshop is (hours) in length and begins promptly at (start time). We will have one break and provide light refreshments.

See you then!

(Department Name)
# Training Administrator Checklist

<table>
<thead>
<tr>
<th>Pre-Course</th>
</tr>
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<tbody>
<tr>
<td>1. Refer to shared training calendar to help inform a training date.</td>
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<tr>
<td>2. Complete and submit the Course Request Form.</td>
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<tr>
<td>3. Put session dates in shared trainingadmin calendar</td>
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<td>The course is created and registration will open.</td>
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<td>4. Create an Outlook appointment from your departmental inbox to send to participants once they have registered in the system (best practice).</td>
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<tr>
<td>5. Training requests are approved by TA.</td>
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<td>6. Send participant the Outlook appointment.</td>
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<td>7. Manage cancelations as they come in by changing participant’s status.</td>
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<tr>
<td>8. Run query for course rosters, or any other reporting needs.</td>
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<tr>
<td>9. Be sure that everyone signs the sign-in sheet at the training session.</td>
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</tbody>
</table>

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<thead>
<tr>
<th>Post-Course</th>
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<tbody>
<tr>
<td>1. Use sign in sheet to enter attendance data (No Show, Canceled, or Completed).*</td>
</tr>
<tr>
<td>2. Inform the lead training administrator (HR) that the course has been completed, and the attendance has been entered.</td>
</tr>
<tr>
<td>3. The course session will then be marked as complete.</td>
</tr>
</tbody>
</table>

*Use No Show if participant does not give notice of absence.  
*Use Canceled if participant gives notice of absence.  
*Use Completed if participant completes all course requirements.
## Sign-in Sheet

**Sponsoring Office: Title of Training**

Date:

*Please print legibly.*

<table>
<thead>
<tr>
<th>Name</th>
<th>Signature</th>
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Contact Information

- System Administration
  - Brandon Ciarlo, 312-362-8338, trainingadmin@depaul.edu

- Curriculum/Catalog
  - Mary McGuinness, 312-362-7183, mmcguinn@depaul.edu

- Access/Security
  - Soumya Radharaman, 312-362-7446, sradhara@depaul.edu

- Additional Information: http://hr.depaul.edu/Workplace%20Learning/LearningAtDePaul/TrainingAdmin/index.html