Using Requisition Administration

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The Solution Series

cyborg™

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Contents

PART 1

Introduction

In This Section

CHAPTER 1

About This Manual

Welcome

This manual has been designed to guide you through the use of the Requisition Administration component of the HR application. It covers setting up and using Requisition Administration.

This manual has been designed as a reference document. It is also used in classroom training. You will find sufficient detail for self-study, before and after classroom training.

Who should use this manual?

This manual is designed to be used by a number of different users. The following users will find it most useful:

- Data managers
  Data managers will find it helpful to read the first four sections of this manual for an overview of Requisition Administration and the steps necessary to implement it.
- End users
  End users and data-entry personnel will find detailed directions throughout the manual outlining the specific steps necessary to carry out various tasks.

Prerequisite skills

Users of this manual should possess a variety of technical skills, depending on the roles they will play. At a minimum, all users should have:

- Microsoft Windows
- The Solution Series

Additional documentation and training courses

The following documentation and training courses are available from Cyborg Systems to help you understand Using Requisition Administration.

Documentation

Document	Description
eCyborg: Using the Web Client or Using The Solution Series: Administrative Solutions	This prerequisite documentation covers the introductory concepts and tasks related to Cyborg's administration solutions. It describes how to navigate through the software and explains important concepts and functionality of the system.

If you do not have a copy of this document, you can obtain one from Customer Support.

Training Courses

Related Course	Description
eCyborg: Using the Web Client or Using The Solution Series: Administrative Solutions	This prerequisite course covers the introductory concepts and tasks related to your specific implementation of Cyborg's administration solutions.

If you wish to attend any of these courses, contact Customer Support or visit our website www.Cyborg.com for details of course dates and availability.

How this manual is organized

This manual has been organized to make it as easy to use as possible. The chapters are grouped accordingly into the following parts:

Part	Chapters	Description
1: Introducing Requisition Administration	1-3	These chapters provide an overview of Requisition Administration and explain its navigational features
2: Setting Up Requisition Administration	4	This chapter explains the key concepts and detailed directions required to implement Requisition Administration.
3: Creating and Maintaining Requisitions and Requisition Candidates	5-7	These chapters explain the key concepts and detailed directions required to use Requisition Administration
4: Appendices	A-B	Appendix A provides a quick reference to Requisition Administration reports. Appendix B provides feedback on the practices and reviews at the end of each chapter.

Following are descriptions of the chapters within the parts:

Part 1: Introduction

The chapters in Part 1 describe this manual and provide an overview of Using Requisition Administration.

Read this chapter		To learn about
1	Introduction	How the manual is organized, where to find what you are looking for, who should use the manual, and where to get help.
2	Overview of Requisition Administration	A high-level overview of Requisition Administration, including an introduction to its important features.
3	Understanding Requisitions and Requisition Candidates	The two basic entities used by Requisition Administration.

Part 2: Setting Up Requisition Administration

The chapter in Part 2 explains the implementation tasks that must be completed before you can begin using Requisition Administration.

Read this chapter		To learn about
4	Implementing Requisition Administration	The key concepts and tasks necessary to implement Requisition Administration.

Part 3: Creating and Maintaining Requisitions and Requisition Candidates

The chapters in Part 3 explain Requisitions and Requisition Candidates.

Read this chapter		To learn about
5	Creating and Maintaining Requisitions	How to create and maintain Requisitions and how to search for Requisitions.
6	Creating and Maintaining Requisition Candidates	How to create and maintain Requisition Candidates and how to search for a Requisition's associated Requisition Candidates.
7	Changed Procedures when using Requisition Administration	How existing procedures and processes change when using Requisition Administration.

Part 4: Appendices

The appendices in Part 4 contain quick reference information and practice and review answers:

Use this appendix		To learn about
A	Report Quick Reference	A quick reference to Requisition Administration reports.
B	Practice and Review Answers	Detailed answers to the practices and reviews at the end of the instructional chapters.

How to use this manual

This manual has been designed as a reference manual as well as a training manual. It has been written to facilitate self-study before and after classroom training.

Table of contents

The manual has been carefully designed for ease of use. All our manuals are written to be task oriented to help you complete your business tasks using our software.

The table of contents lists all the tasks and their respective chapters.

Glossary of Terms

A Glossary of Terms section is provided to explain terms used in the documentation.

Index

An index is provided to help you locate specific information.

This document was designed to reduce your need for an index. You should find the table of contents sufficient.

Introductory chapters

It is important that you read the introductory chapters first. Chapter 1 ensures you get the most out of the information we have provided. Chapter 2 provides a high level overview. Read it to get the big picture before reading the detailed instructional chapters.

Instructional chapters

All chapters, other than the introductory chapters, are instructional chapters. They contain detailed instructions on how to complete the business tasks. Each instructional chapter has the following distinct sections:

Key Concepts

Always read the conceptual information first. This will help you understand why you have to perform certain tasks. It will also help you make decisions about your options and help you understand the importance of performing certain tasks. Exercises to help you apply the concept to a business task are included at the end of most concepts.

Apply the Concept

To be certain that you have understood the key concepts in a chapter, complete the Apply the Concept exercises provided. The answers to these exercises can be found in the appendices.

Detailed Directions

When you are ready to perform a task, review the Detailed Directions, which provide guidance, as well as the specific steps, to complete a task.

Guided Practice

The Guided Practice within the Detailed Directions offers you an opportunity to practice a task with step-by-step instructions. It takes you through the various steps, providing detailed examples so you can gain a comfort level with the task. Guided Practice is easy to locate.

For practice, type 'ABC Solutions'.

Note: *To successfully follow the Guided Practice, you must have completed all the previous Guided Practice exercises in the manual. The Guided Practice uses the test data installed with our software. For the Guided Practice exercises to work, this test data must not have been altered.*

All users who complete the Guided Practice must either have their own copies of the test data or have the test data restored for them.

Extended Practice

To be certain that you have understood the tasks in a chapter, complete the Extended Practice provided. The Extended Practice gives you the opportunity to complete one or more tasks without step-by-step guidance. The answers to these exercises can be found in the appendices.

Note: *To be able to complete the Extended Practice exercises in the manual, you must have completed all the previous exercises. You must also be using the test data delivered with the software. This test data must not have been altered.*

Review of Questions Answered

To be certain that you have understood all of the information in a chapter, complete the review questions provided at the end of a chapter. The answers to these questions can be found in the appendices.

Conventions used in this manual

The underlying page layout and design of this manual are meant to be as intuitive as possible for you. Our intent is to make it easy to navigate through the manual and concentrate on learning and doing.

Cross-references

Wherever appropriate, we provide cross-references to help you find additional information or further discussion of a specific topic.

Refer to a cross-reference to find more detail or more discussion on a given topic.

Notes

Whenever there is important information you should be aware of, we provide a note.

Note: *You will find tips or quick techniques covered in notes.*

How to get additional help

If you can not find the answers to your questions in this manual, contact Customer Support, who will be able to answer specific questions and give you general advice on training.

Please visit our web site ***www.Cyborg.com*** (see "Cyborg Home - http://www.Cyborg.com") for the latest schedule of available courses and course descriptions.

Suggestions and feedback

We value your feedback on our performance support materials. Please forward any comments on this manual to Customer Support.

CHAPTER 2

Overview of Requisition Administration

In This Chapter

Overview

This section provides an overview of Requisition Administration and the facilities it offers.

What is Requisition Administration?

Requisition Administration is a flexible and easy-to-use system for tracking new hires and transfers that may take place to fill vacancies.

Requisition Administration allows your organization to fill vacancies with candidates who are existing employees, applicants, or walk-ins. If you wish to record only the name and position applied for information for an applicant, you can do so in Requisition Administration without having to use Applicant Administration forms.

The system keeps a record of Requisitions (formal requests to fill vacancies). It then tracks the progress of Requisitions, alerting you when a request has been fulfilled and preventing further candidates from being hired or transferred.

Why use Requisition Administration?

Requisition Administration should be used if your organization needs to maintain greater control over hiring and transferring to fill vacancies. The system enables you to do the following:

- Ensure no hires or transfers take place without a formal request.
- Ensure no hires or transfers take place in excess of available vacancies.

Requisition Administration features

These are the main features of Requisition Administration:

- Customizable level of control
- Flexibility in how vacancies are represented
- As-of dates
- Integration with other Solution Series processes
- Dynamic online inquiries
- Maintenance of historical data
- Integrated system security

Easy navigation

Like all other components of The Solution Series software, navigating Requisition Administration forms is quick and easy.

Customizable level of control

You can choose whether you want Requisition Administration to maintain a flexible or a strict level of control. For example, you may want to be able to allow a hire to take place even though it will exceed the vacancy limit set on the corresponding Requisition. Alternatively, you may want to ensure that vacancy limits are never exceeded.

When you implement Requisition Administration you choose the level of control you want by selecting the type of validation messages that will be displayed. You can choose either Warnings (which can be overridden) or Rejects (which can not be overridden).

Flexibility in how vacancies are represented

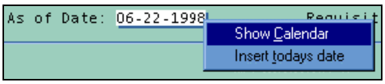
Requisition Administration can measure vacancies in four different ways—by Headcount, Full Time Equivalent, Hours, or Salary. You can use a different unit of measure for each Requisition, enabling you to match your recruiting requirements. However, once a Requisition Unit is selected, it must be used throughout the life cycle of the Requisition.

As of dates

All Requisition Administration view forms have an As of Date entry at the top of the form. When the form is displayed, the As of Date is the current date. This means that the data viewed on this form is valid as of this date.

You can change the As of Date to view data as of another date. Past dates can be entered in this text box to view data as of an earlier point in time.

To change the As of Date, position the pointer in the As of Date text box and right-click. The following shortcut menu will appear:



Select Show Calendar to display the Calendar dialog box, from which you can select the year, month, and day you want to enter in the text box.

To return to the current date at any time, simply type the date in the text box or select Insert today's date from the shortcut menu.

Integration with other Solution Series processes

The following processes that handle hiring employees and transferring applicants are undertaken on standard Solution Series forms:

- Hiring new employees—Employee Information form (EF-SCR) or the Set Up A New Employee form (NH-SCR)
- Transferring applicants—Applicant Transfer form (ET-SCR)
- Assigning employees to new Positions—Incumbency - Basic Details form (M40SCR)

Requisition Administration has been carefully integrated with these processes, ensuring Requisition Administration validation takes place and relevant Requisition Administration records are updated whenever one of these processes is undertaken.

In addition, if you are using the Applicant Administration component of The Solution Series software, the process of entering the details of the job or position for which an applicant is applying on the Job Or Position Applied For form (003SCR) automatically creates a corresponding candidate record in Requisition Administration.

To achieve this level of integration, some Solution Series forms have been modified to allow the entry of relevant Requisition Administration information directly on them or the selection of Requisition Administration records from additional form panels.

Dynamic online inquiries

The system's dynamic online inquiry facility enables you to determine the following:

- Which Requisitions are open
- Which candidates filled a Requisition
- Which candidates applied against a Requisition

If Position Administration is in use, you can also view which Requisitions are open for a particular Position. You have the ability to choose, at the Position level, which positions should be included in Requisition Administration.

Maintenance of historical data

Requisition Administration maintains a record of historical data for analysis purposes. You can view snapshots of the data as of a particular date.

This enables you to analyze a particular recruitment cycle and identify whether efficiency improvements can be made. For example, you can check how long the recruitment cycle took and whether there were any holdups in the process.

Integrated system security

As with all Solution Series components, all features of our integrated system security can be applied to the Requisition Administration component.

Review of Questions Answered

1. Define Requisition Administration.

2. Match the Requisition Administration feature to the corresponding description:

Feature	Answers	Description
1. Customizable level of control 2. Flexibility in how vacancies are represented 3. Integration with other Solution Series processes 4. Maintenance of historical data 5. Integrated system security		a) Integration with the hiring and transfer processes to update relevant Requisition Administration records. b) Controlled by selecting the type of validation message, Warning or Reject. c) Vacancies are measured in four different ways (Headcount, FTE, Hours, Salary). d) The system security feature. e) History is maintained to perform data analysis as of a particular date.

3. Identify and explain how Human Resources Administration interacts with Requisition Administration.

CHAPTER 3

Understanding Requisitions and Requisition Candidates

In This Chapter

Introduction

Requisition Administration uses two entities—Requisitions and Requisition Candidates—to track new hires, transfers, and any Position assignments that may take place to fill vacancies. This section explains what these two entities are and how they relate to each other.

☞ *See* **Creating and Maintaining Requisitions** *(on page 45) to learn how to create and maintain Requisitions.*

☞ *See* **Creating and Maintaining Requisition Candidates** *(on page 81) to learn how to create and maintain Requisition candidates.*

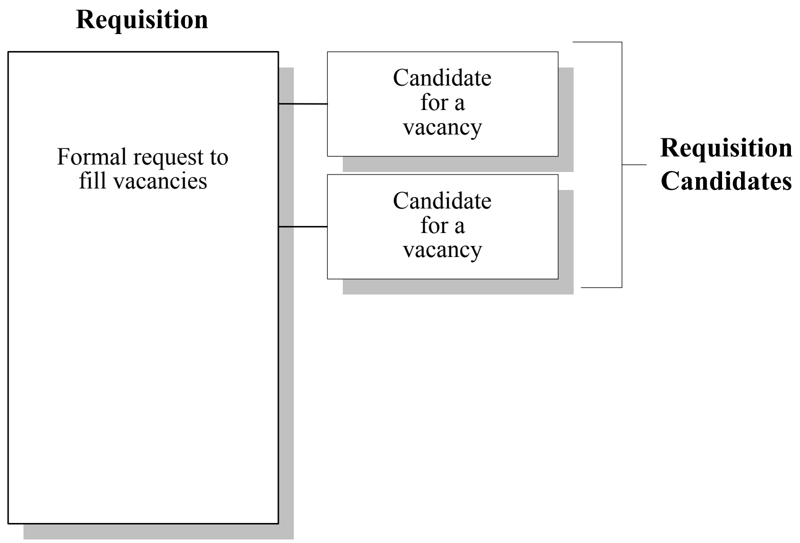
Questions answered

The following questions are answered in this section:

1. What are Requisitions and Requisition Candidates and how do they relate to each other?
2. How are Requisition vacancies measured?
3. What are the Requisition's Remaining and Threshold Amounts?

Requisitions and Requisition Candidates

A Requisition is a formal request to fill vacancies. Each candidate for a vacancy on a Requisition is assigned to the Requisition as a Requisition Candidate.



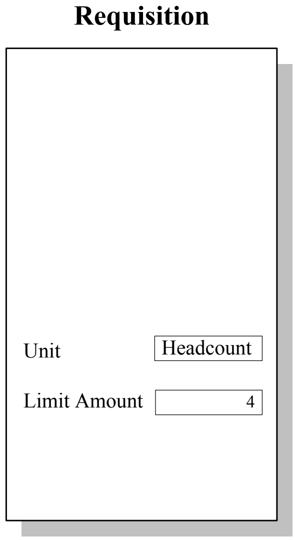
Apply the Concept
Explain how Requisitions and Requisition Candidates could relate to each other in your organization.

Requisition Unit and Limit Amount

Each Requisition can measure vacancies in one of the following ways:

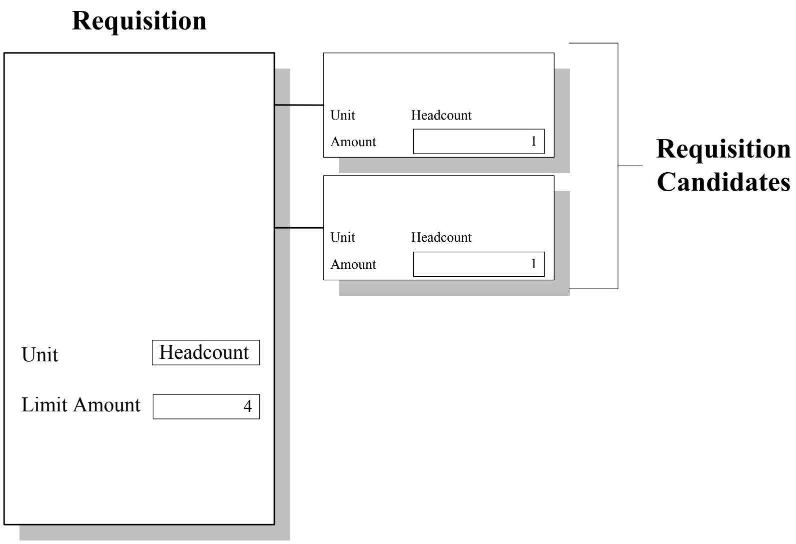
- By FTE (Full Time Equivalent)
- By Headcount
- By Hours
- By Salary

Vacancies are represented on a Requisition by selecting one of these Units and entering a Limit Amount. For example, a formal request to fill four full-time vacancies could be represented by selecting a Unit of Headcount and entering a Limit Amount of 4.



When a Requisition Candidate is assigned to a Requisition, the candidate is given a value in terms of the Requisition's Unit of measure. In the following example, each Requisition Candidate assigned to the Requisition has a value of 1 Headcount Unit.

The same Unit must be used throughout the life of the Requisition and for each Requisition Candidate. Although different Units can be used for different Requisitions, you may find it helpful to use one Unit consistently or to have clear guidelines as to which Units are used for which types of Requisitions.



Apply the Concept
The value of a Requisition expressed as an FTE, Hours, Salary, or Headcount is called the:

Apply the Concept
What is the total value of a Requisition called?

Apply the Concept
What must be the same throughout the life of the Requisition and for Requisition Candidates?

Requisition and Requisition Candidate status options

Each Requisition has one of the following statuses:

- Open-Not Authorized
- Open-Authorized
- Pending Closure
- Closed

Each Requisition Candidate also has a status, which can be one of the following:

- Candidate—An applicant or existing employee could apply against a Requisition and become a candidate
- Selected/Not Empl'd—Used for a candidate who has been offered a Position but has not yet started work
- Selected/Employed—Once an Employee Information form (EF-SCR), New Hire form (01-SCR), or Incumbency—Basic Details form (M40SCR) is processed, the candidate's status becomes Selected/Employed
- Not Selected—Used for a candidate not selected to fill the Requisition
- Withdrawn—Used for a candidate who removes him or herself from consideration

A Requisition's status and the status of each of its associated Requisition Candidates will change when certain processes are carried out. For example, a Requisition's status changes to Closed when the vacancies it represents have been filled. No further Requisition Candidates can be assigned to a Requisition that is Closed.

The following is a guideline to Requisition and Requisition Candidate statuses and how the two work together.

Requisition Status:

Current Status	Can Change To This Status	Reason
No Status	Open-Not Authorized	To set up New Requisition
Open-Not Authorized	Open-Authorized	To Select Candidates
	Closed (manual)*	Recruitment Freeze
Open-Authorized	Pending Closure	Enough Selected Candidates
	Closed (manual)*	Recruitment Freeze
Pending Closure	Closed	Recruitment Freeze
	Closed (manual)*	Recruitment Freeze

*This can only be done if there are no Selected/Not Empl'd candidates. If there are any Selected/Not Empl'd candidates and you must still close the requisition, these candidates must first be changed to Selected/Employed or Withdrawn before the Requisition can be closed manually.

Candidate Status:

If Requisition is Open-Not Authorized	
Current Status	**New Status**
None	Candidate
Candidate	Withdrawn
Withdrawn	Candidate

If Requisition is Open-Authorized	
Current Status	**New Status**
None	Candidate
Candidate	Not Selected
	Selected/Not Empl'd
	Withdrawn
Not Selected	Candidate
Selected/Not Emply'd	Not Selected
	Withdrawn
	Selected/Employed
Withdrawn	Candidate

If Requisition is Pending Closure	
Current Status	**New Status**
None	Candidate
Candidate	Withdrawn
	Not Selected
Selected/Not Emply'd	Withdrawn
	Not Selected

If Requisition is Closed
Only Possible Statuses
Selected/Employed
Not Selected
Withdrawn

☞ *See* **Creating and Maintaining Requisitions** *(on page 45) for more detail about circumstances in which a Requisition's status can change.*

☞ *See* **Creating and Maintaining Requisition Candidates** *(on page 81) for more detail about the circumstances in which a Requisition Candidate's status can change.*

Requisition's Remaining Amount

As each candidate is selected, the status of the corresponding Requisition Candidate record is manually changed to Selected/Not Empl'd. When this happens, the system calculates how many vacancy Units are left on the Requisition, and displays the figure as the Requisition's Remaining Amount. As vacancies are filled, the Remaining Amount decrements until, finally, there are no more Units available and no further candidates can be Selected/Not Empl'd.

Requisition's Threshold Amount

Regardless of the unit you have selected to measure the vacancies on a Requisition, you can set a Threshold Amount for the Requisition in addition to a Limit Amount. By doing this, you can prevent a Requisition from remaining open when the vacancies have been filled before reaching the Requisition's Limit Amount. This could happen, for example, when a Requisition's Remaining Amount is less than the minimum salary that would be offered for a vacancy.

The Threshold Amount should, therefore, be the unit value (less than the Limit Amount) that must be met in order for the requisition to be considered filled. The Total Amount needs to be equal to, or exceed, the Threshold Amount to close the Requisition automatically. The Requisition's status changes to Pending Closure or Closed once its Total Amount is equal to or greater than its Threshold Amount.

For example, the salary Threshold Amount could be 45,000 with a 55,000 Limit Amount for a requisition. Filling the requisition for 46,000 would exceed the Threshold Amount, causing a Requisition Status change. Instead of remaining open, the Requisition status would then change to reflect that the Requisition was closed because it met the condition of the Threshold Amount.

Apply the Concept
How is the Threshold Amount feature used?

Time to Fill

Once a Requisition is Closed, the system calculates the elapsed time from the date the Requisition was created until it was filled. This figure is expressed in years, months, and days as a display on the Requisition - Basic Details form (R10SCR).

Review of Questions Answered

1. What are Requisitions and Requisition Candidates and how do they relate to each other?

2. How are Requisition vacancies measured?

3. What are a Requisition's Remaining and Threshold Amounts?

PART 2

Setting Up Requisition Administration

In This Section

C H A P T E R 4

Implementing Requisition Administration

In This Chapter

Introduction

Before using the features of Requisition Administration, it is necessary to complete some basic implementation tasks and customize the options to meet the needs of your organization. This section explains the implementation tasks that must be carried out before you can begin using Requisition Administration.

Tasks

The following tasks are covered in this section

- Setting Requisition Administration options.
- Editing Requisition Administration option lists.

Note: *The second task is optional. It needs to be completed only if you want to add more options.*

Questions answered

The following questions are answered in this section:

1. What Requisition Administration considerations should you take into account when deciding on an implementation strategy?
2. Which Requisition Administration option lists contain options that should never be changed?
3. What extra security might be needed for Requisition Administration?

Requisition Administration setup options

Requisition Administration is set up on the System Options form (TG-SCR). The Req Admin list box on this form enables you to select whether or not Requisition Administration is in use, and, if it is in use, what type of validation messages will be displayed.

Before setting up Requisition Administration, you need to decide what your implementation strategy will be. You must consider the following:

- Which type of validation messages you want.
- How shared settings affect the way you implement Requisition Administration.

These concepts are described in more detail below.

Validation messages

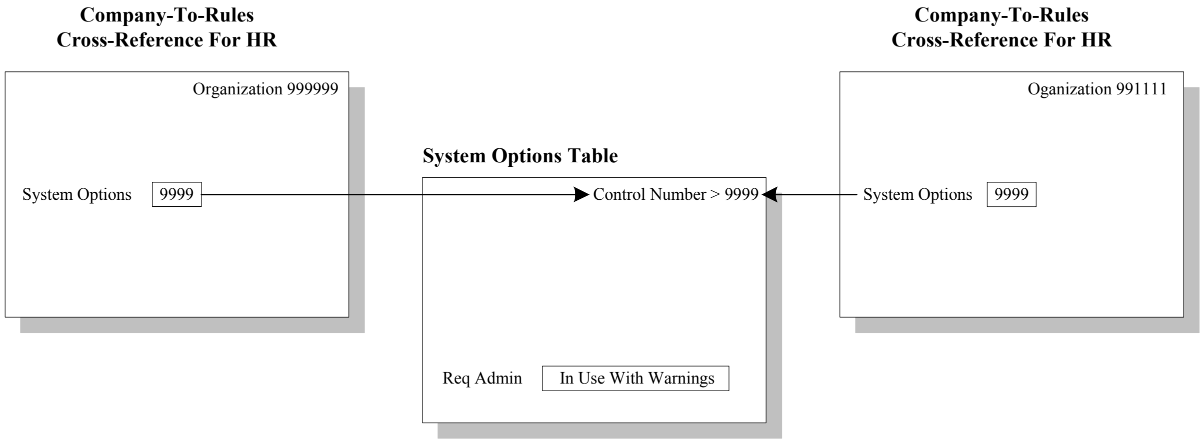
When processing a new hire, transferring an applicant from the Applicant Administration system to a live organization, or assigning an employee to a new position, Requisition Administration validates whether the vacancy limit on the corresponding Requisition will be exceeded. If the vacancy limit will be exceeded, a Warning or a Reject message is displayed.

- Warning messages—Can be overridden, so you can allow a hire to take place even if it will exceed the Requisition's vacancy limit.
- Reject messages—Cannot be overridden, so a Requisition's vacancy limit can never be exceeded.

The type of validation message the system displays is governed by the option selected on the System Options form (TG-SCR). When you implement Requisition Administration, you must decide which type of message is to be displayed and select the option you want on this form.

Shared settings

Organizations that share the same Control Number on the Organization-To-Rules Cross-Reference For HR form (AX-SCR) will share the same settings. For example:



In the example above the Control Number 9999 identifies a System Options table record on which the Requisition Administration validation option has been set to 'In Use With Warnings'. Two organizations are linked to this table record by using the Control Number 9999 on the Company-To-Rules Cross-Reference For HR form (AX-SCR). Both organizations therefore share the same Requisition Administration setting.

To implement Requisition Administration for a group of organizations that are linked in this way, you need to access the System Options form (TG-SCR) for only one organization in the group. However, each organization must have Organization-To-Rules Cross-Reference For HR form (AX-SCR) established that references the System Options form (TG-SCR) including Applicant Administration.

See also:

- Setting Requisition Administration options ***(see "Setting Requisition Tracking System options" on page 37)***

For detailed directions on setting Requisition Administration options

Apply the Concept
Consider your current requisition process. Describe the tasks and decisions your organization would make to implement Requisition Administration.

Apply the Concept

Multiple choice. Circle the appropriate choice.

a) Requisition Administration validates whether the vacancy limit on a corresponding requisition will be exceeded for:

- i) processing new hires
- ii) assigning an employee to a new Position
- iii) transferring an applicant to a live organization
- iv) all of the above
- v) i & ii only

b) In shared settings

- i) you will need to access the System Options form (TG-SCR) for each organization in the group
- ii) all organizations share the same Control Number
- iii) all of the above
- iv) none of the above

Option list editing options

Five sample option lists are delivered with Requisition Administration:

- Requisition Status (RT01)
- Approved By (RT02)
- Reason for Closure (RT03)
- Requisition Unit (RT04)
- Requisition Candidate Status (RT05)

You should review and, where necessary, edit these option lists to reflect your organization's requirements.

Option lists you can edit

You can edit the following option lists by adding your own options to reflect your organization's requirements:

Approved by (RT02)

For example, add the names or job titles of managers authorized to approve Requisitions.

Reason for closure---RT03

For example, add any additional reasons for closing a Requisition. Do not delete 'Filled', which is automatically displayed in the list box when the Requisition is filled.

Option lists that should not be changed or deleted

Do not change or delete any of the following option list options, as Requisition Administration needs them to function properly:

Requisition Status---RT01

Open—Not Authorized (A1)
Open—Authorized (A2)
Pending Closure (C1)
Closed (C2)

If your organization requires more detailed tracking of the stages a Requisition goes through, you can add additional option list options. However, these will have no effect on validation. Only the delivered options affect validation.

Requisition Unit---RT04

FTE (01)
Headcount (02)
Hours (03)
Salary (04)

If you do not want one or more of these Unit options to be used, you may delete them, but the values should not be changed. For example, an organization may never want to allow requisitions to be filled by Salary units.

Requisition Candidate Status---RT05

Selected/Not Empl'd (01)
Selected/Employed (02)
Candidate (03)
Not Selected (04)
Withdrawn (05)

If your organization requires more detailed tracking of the stages a Requisition goes through, you can add additional option list options. However, these will have no effect on validation. Only the delivered options affect validation.

See also:

- **Editing Requisition Administration option lists** ***(on page 38)***

For detailed directions on editing Requisition Administration option lists

Security considerations

As with other components of *The Solutions Series* software, it is important to consider whether additional security is needed to match your organization's internal procedures. For example, you may want to consider adding additional security to the Requisition—Basic Details form (R10SCR) so that only certain personnel are able to use it to create Requisitions. By doing this you can ensure Requisitions are not set up incorrectly or in error.

Contact your system's Security Officer if you wish to add additional security.

Apply the Concept
Identify the option lists that can be edited within Requisition Administration. Give an example of how each option list might be modified to meet your organization's requirements.

Apply the Concept
Identify the option lists whose values Cyborg recommends not be modified. Give an example of when you could delete a value in one of these option lists.

Apply the Concept
Multiple choice. Circle the appropriate choice.
All Requisition Administration delivered option lists

i) do not reflect an organization's requirements
ii) will always have an effect on validation
iii) can be added to, changed, or deleted
iv) all of the above

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Setting Requisition Tracking System options

Complete this task for each organization that has a unique Control Number on the Organization-To-Rules Cross-Reference For HR form (AX-SCR).

Note: *If a group of organizations share the same Control Number, you need to complete this task for only one organization in the group for the Requisition Administration option to apply to all of them.*

1. Access the System Options form (TG-SCR)

Access this form by making the following selections from the Navigator:

Component:	HR Setup
Process:	Setup HR Rules
Task:	System Options

For practice, access the System Options form (TG-SCR).

2. Select an option from the Req Admin list box

Select the option you want for the type of validation messages required. For validation messages that can be overridden, select 'In Use With Warnings'. For validation messages that cannot be overridden, select 'In Use With Rejects'.

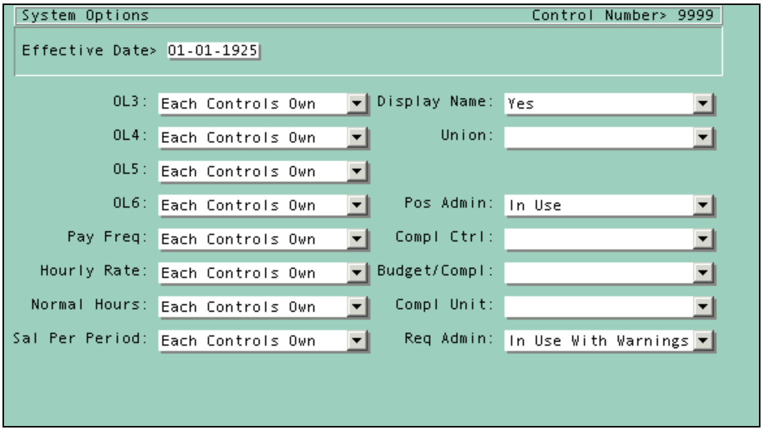
For practice, select 'In Use With Warnings'.

3. Click Save or press Enter

A 'Maintenance has been performed' message confirms that the option has been set up.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



Note: *Once Requisition Administration is in use, no new Logical Employee Models can be created. To add new Logical Employee Models, the value in the Req Admin list box must first be changed to 'Not In Use'.*

See also:

- Requisition Administration setup options ***(on page 31)***

For more information on setup options used in Requisition Administration

Editing Requisition Administration option lists

To edit Requisition Administration option lists, follow these steps:

1. Determine the options and descriptions to be added

Review the option lists listed below and decide what options and descriptions you want to add:

Requisition Administration option lists	**Option list identifier**
Requisition Status	RT01
Approved By	RT02
Reason for Closure	RT03
Requisition Unit	RT04
Requisition Candidate Status	RT05

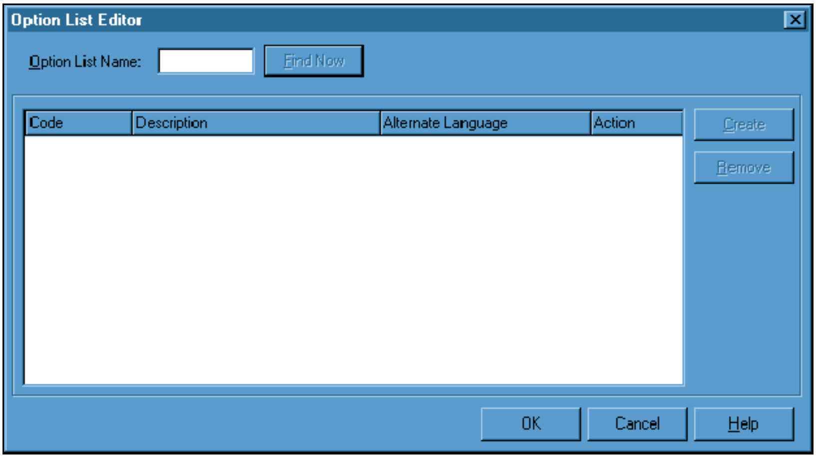
2. Access the Option List Editor (CSUPDT)

Access this dialog box by making the following selections from the Navigator:

Component: Development Tools
Process: Option Lists
Task: Edit

For practice, access the Option List Editor (CSUPDT).

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



3. Enter the Option List Name

Type the identifier of the option list you want to edit.

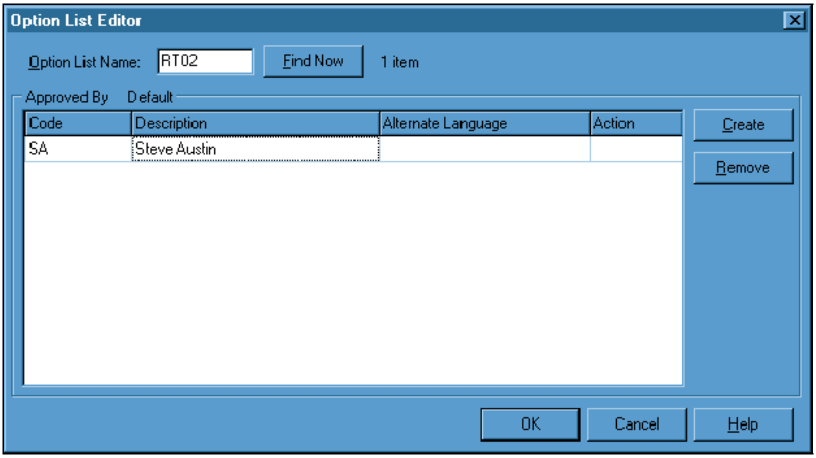
For practice, type 'RT02'.

4. Click Find Now or press Enter

The Option List Editor (CSUPDT) is displayed listing the options in the specified option list.

For practice, click Find Now or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:

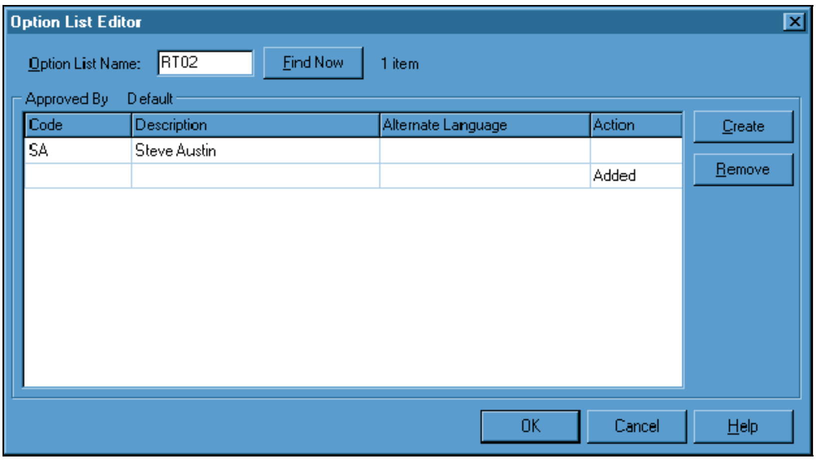


5. Click the Create button

An additional blank line is displayed in the Option List Editor (CSUPDT) dialog box.

For practice, click the Create button.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



6. Enter a Code

Type the new option value.

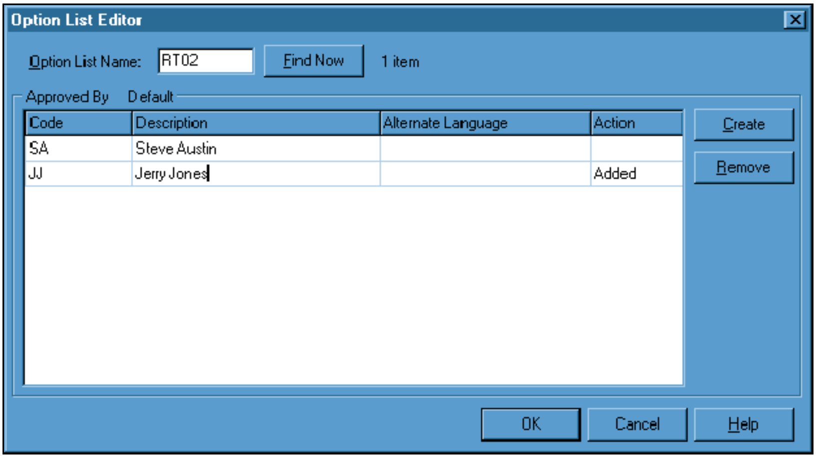
For practice, type 'JJ'.

7. Enter a Description

Type a Description of your new option, up to 20 characters in length.

For practice, type 'Jerry Jones'.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



8. Click OK or press Enter

Click OK or press Enter to process the entry.

For practice, click OK.

See also:

- Option list editing options ***(on page 34)***

To learn more about editing list options

Review of Questions Answered

1. What Requisition Administration considerations should you take into account when deciding on an implementation strategy?

2. Which Requisition Administration option lists contain options that should never be changed?

3. What extra security might be needed for Requisition Administration?

PART 3

Creating and Maintaining Requisitions and Requisition Candidates

In This Section

CHAPTER 5

Creating and Maintaining Requisitions

In This Chapter

Introduction

To use Requisition Administration, you must first set up the Requisitions that represent your vacancies. This section describes the key concepts and tasks associated with establishing Requisitions and subsequently viewing, modifying, or deleting them.

Tasks

The following tasks are covered in this section:

- Creating Requisitions
- Viewing Requisitions
- Modifying Requisitions
- Deleting modified Requisitions

Prerequisites

Before you can carry out any of the tasks described in this section, ensure that Requisition Administration implementation tasks have been completed.

☞ *Refer to* **Implementing Requisition Administration** *(on page 29) for more information about these tasks.*

Questions answered

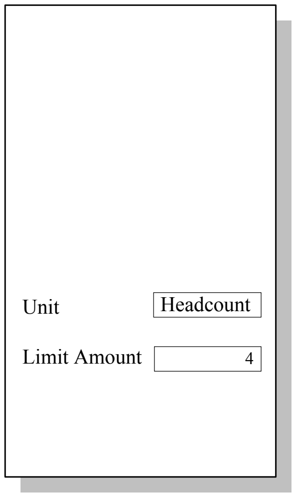
The following questions are answered in this section:

1. How and why can a Requisition status change?
2. What can you do to rectify a change made in error to a Requisition's basic details?
3. What kind of interaction is there between Requisition and Position Administration?

Single and multiple vacancies

A Requisition can represent one or more vacancies. You specify the number of vacancies by selecting a Requisition unit and entering a Limit Amount. For example, a formal request to fill four full-time vacancies could be represented by selecting a unit of Headcount and entering a Limit Amount of 4.

Requisition



The unit of measure and the Limit Amount cannot be changed once the Requisition has Requisition Candidates assigned to it. If you need to add more vacancies, a new Requisition must be created.

See also:

- Requisition Unit and Limit Amount ***(on page 17)***

Apply the Concept
True or False. Explain any false answers.
a) A Requisition can represent one or more vacancies.
b) You can change the unit of measure and Limit Amount once a Requisition has a candidate assigned to it.

Requisition approval

You can record information about who has approved a Requisition by selecting an option from the Approved By list box. For example, you may have internal controls that require Requisitions to be approved by specific individuals (John Smith) or by anyone at a specific level (Senior Manager).

The options in the Approved By list box are populated by an option list. You can edit this option list at any time to add or delete the names of approvers.

☞ *See* **Implementing Requisition Administration** *(on page 29) for details about editing this option list.*

Apply the Concept

Consider your current Requisition approval process. How would you use Requisition Administration to support this process?

Recruitment campaigns

You can identify Requisitions that are part of a particular recruitment campaign by entering a three-digit alphanumeric Campaign ID for the Requisition on the Requisition - Basic Details form (R10SCR).

Apply the Concept
Describe how your organization might use the recruitment campaign feature.

Linking a Requisition with a Position---Position Administration users only

If you are using Position Administration along with Requisition Administration, you must link each Requisition with a Position so that you can search for all Requisitions associated with a specific Position.

Apply the Concept

True or False. If false, explain.

A Requisition can be linked to a Position at any time.

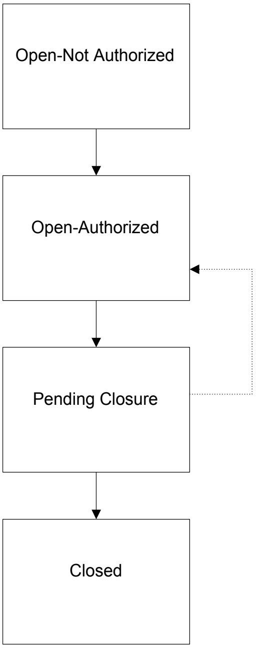
Requisition status - how and why it can change

Each Requisition has one of the following status options:

- Open - Not Authorized
- Open - Authorized
- Pending Closure
- Closed

The following chart represents the event sequence for Requisition status:

Requisition Status



A Requisition's status when it is first created must be Open - Not Authorized. This ensures that candidates are not selected for unauthorized Requisitions. This does not prevent you from interviewing candidates for a Requisition that has not yet been authorized.

A status of Pending Closure indicates that the Limit Amount for the Requisition has been fulfilled, but that some of the Requisition Candidates still have a status of Selected/Not Empl'd. The Requisition's status changes to Closed only when all the Requisition Candidates filling the vacancies it represents have a status of Selected/Employed and there are no other Selected/Not Empl'd candidates.

A Requisition's status can revert from Pending Closure back to Open - Authorized if a candidate who was Selected/Not Empl'd should withdraw.

A Requisition's status can not be changed to Closed if there are still Requisition Candidates with a status of Selected/Not Empl'd assigned to the Requisition.

You can change the status of a Requisition manually or it can be changed automatically as a result of other processes.

See also:

- Requisition and Requisition Candidate status options ***(on page 20)***
  To learn what the specific statuses are

Apply the Concept
True or False. Explain any false answers.
a) When first created, a Requisition's status must be Open - Not Authorized.

b) A Requisition's status can be changed to Closed if there are still Requisition Candidates assigned to the Requisition with a status of Selected/Not Empl'd.

What you can modify

If you change the Requisition status you will be prompted to also change either the Effective Date or the Key Separator for the Requisition. The original Effective Date of the first Requisition for this Requisition ID is stored and displayed on each succeeding Requisition occurrence.

You may change the Position list box only if the Requisition Status is Open - Not Authorized.

To effect a recruitment freeze, change the Requisition Status to Closed, thus preventing Candidates from being assigned against Requisitions. You can use the Close Reason list box to record the reason for the temporary closure of the Requisition, for example, Recruitment Freeze.

Changes may be made to the Approved By, Pos Available, Campaign ID, and Close Reason boxes as needed.

No changes are allowed to a Requisition whose Requisition Status is Closed.

If a change to a Requisition's basic details has been made in error, you will be able to delete that record only if no Requisition Candidates are associated with it. If Requisition Candidates are associated with this Requisition, then you must modify the existing record (if the error is within a non-key text box) or create a new record (if the error is within a key text box).

See also:

- Modifying Requisitions ***(on page 74)***

To learn now to modify a Requisition by changing the basic details on an existing record

Using search criteria

After Requisitions have been created for vacancies, and you wish to view selected Requisitions, you may search by one, two, or all three of the following criteria:

- By Position
- By As of Date
- By Requisition Status

For example, you can view all Open - Authorized Requisitions for Accounts Payable Clerk as of November 1, 1996.

If you enter	The result is
As of Date only	A form display of all Requisitions and all statuses that relate to that date. If no date is entered, the current date is used.
Position and As of Date	A form display of only those Requisitions with a matching Position and As of Date.
Requisition Status and As of Date	A form display of only those Requisitions with a matching Requisition Status and As of Date.
Position, Requisition Status, and As of Date	Records that match the specified Position and As of Date are located first. Within those selected records, any records that match the Requisition Status are then selected for display.

After you enter your selection criteria and execute the form, the matching records display in list form in the body of the form. A button to the left of each matching Requisition allows you to navigate to the Requisition - Basic Details form (R10SCR) for the record selected.

If no matching Requisition records are found, you will see a 'Complete' message at the bottom of the form.

If more requisitions are found than can be displayed on the form, click the More button to continue viewing Requisition information.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Creating Requisitions

Note: *If Position Administration is in use, the Requisition - Basic Details form (R10SCR) used in this task will display a Position list box, where you will specify the position associated with this new requisition. If Position Administration is not in use, you do not need to specify a position on the Requisition - Basic Details form (R10SCR).*

1. Access the Requisition - Basic Details form (R10SCR)

Access this form by making the following selections from the Navigator:

Component: Requisition Administration
Process: Requisition Details
Task: Setup/Maintain a Requisition

For practice, access the Requisition - Basic Details form (R10SCR).

2. Click the Clear button on the toolbar

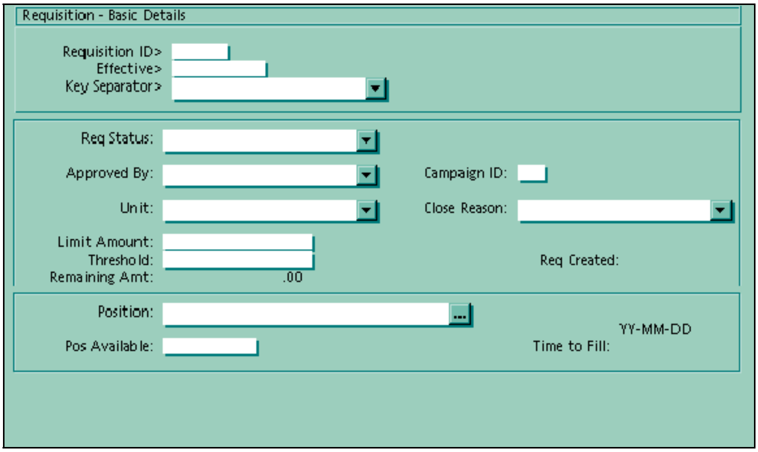
If the Requisition - Basic Details form (R10SCR) contains data, clear the form using the Clear button on the toolbar.

The Requisition - Basic Details form (R10SCR) is cleared and ready for the entry of a new Requisition.

Note: *Display text boxes are not cleared, and will be updated with the appropriate data when the form is processed.*

For practice, click the Clear button on the toolbar.

If you completed the Guided Practice, the resulting form should look similar to the example that follows (Position Administration was in use):



3. Enter the Requisition ID

Type a unique alphanumeric Requisition ID up to six characters in length.

For practice, type '000005'.

4. Enter the Effective (Date)

Type an entry into the Effective (Date) text box for the Requisition. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere). As an alternative, position the pointer in the Effective text box and right click to display the calendar or insert today's date.

For practice, type '09-18-1996' (US and Canada) or '18-09-1996' (elsewhere).

5. Enter the Key Separator

Select 1st Occurrence from the Key Separator list box. This indicates the record occurrence for this date.

For practice, select '1st Occurrence'.

6. Select the Req Status

Select Open-Not Authorized from the Req Status list box.

Note: Open-Not Authorized is the default status for a new Requisition.

For practice, select 'Open-Not Authorized'.

7. Select the Unit

Select a unit of measure for the Requisition from the Unit list box.

For practice, select 'Headcount'.

8. Enter the Limit Amount

Enter a Limit Amount for the Requisition. The format in which you enter the amount depends on the unit of measure you are using:

Unit of measure	Format you must use
FTE or Hours	Enter an up-to-seven-digit figure with two decimal places. For example: 99,999.99
Headcount	Enter an up-to-six-digit figure. For example: 999,999
Salary	Enter an up-to-12-digit figure. For example: 999,999,999,999

For practice, type '3'.

9. Enter the Threshold limit (optional)

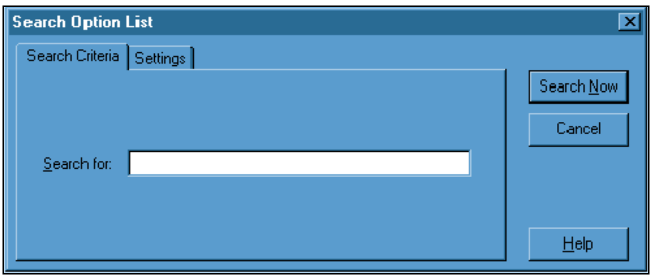
Type a Threshold limit for the Requisition. For example, if the total Requisition limit is a salary of 100,000, the threshold could be set at just below the Requisition Limit, for example, 95,000. This threshold prevents the following: (1) the Requisition from remaining open if the vacancy is filled and the Requisition limit has not yet been reached, and (2) another candidate from being selected.

For practice, leave this text box blank.

10. Select the Position (if Position Administration is in use)

Click the Position list box to display the Search Option List dialog box.

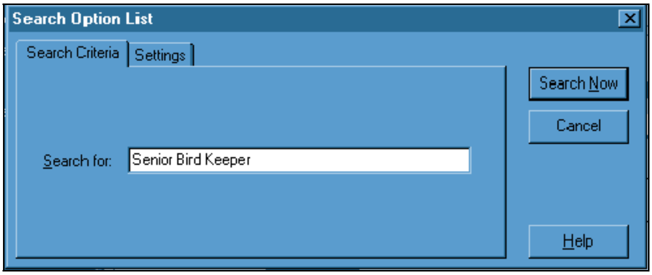
For practice, click the Position list box.



11. Enter the Search for criteria (Position Administration only)

Type the associated Position for which you want to search.

For practice, type 'Senior Bird Keeper'.

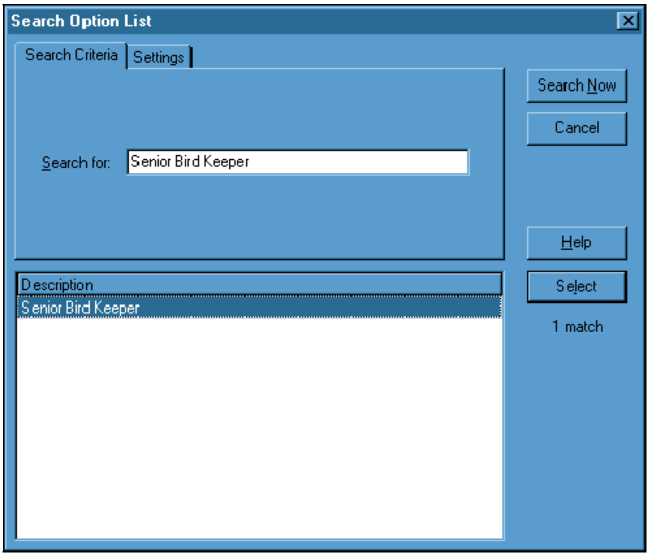


12. Click Search Now or press Enter (Position Administration only)

The results of the search are displayed.

Note: *If no matching Position records are found, you will see the message, '0 matches'.*

For practice, click Search Now or press Enter.



13. Click Select (Position Administration only)

The selected search option is now displayed in the Position list box on the Requisition - Basic Details form (R10SCR).

For practice, click Select.

14. Enter Pos Available (optional) (Position Administration only)

Type the date from which the Position is available. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere). As an alternative, position the pointer in the Pos Available text box and right click to display the calendar or insert today's date.

For practice, type '09-20-1996' (US and Canada) or '20-09-1996' (elsewhere).

15. Enter the Campaign ID (optional)

Type an up-to-three-position recruitment Campaign ID.

For practice, leave this text box blank.

16. Click Save or press Enter

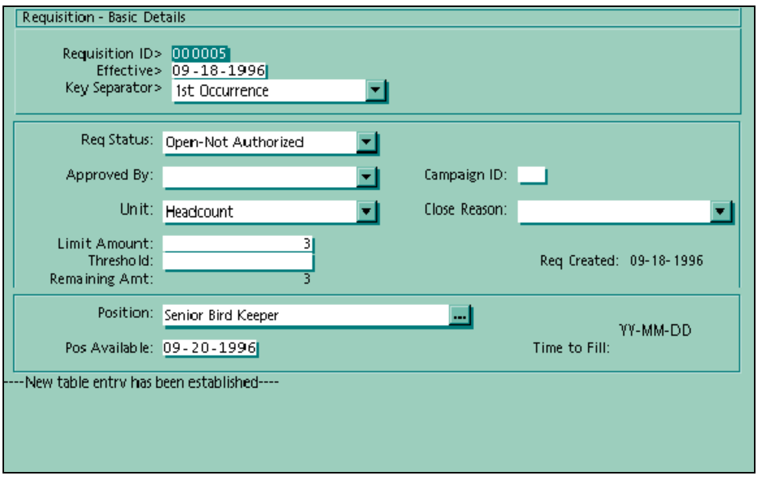
Because this is a new Requisition, the system validates whether the Requisition ID already exists. If it finds a matching Requisition ID and an error message is displayed, you need to repeat step 3, entering a different Requisition ID.

If no errors are found, the data are added, and a 'New table entry has been established' message is displayed at the bottom of the form.

Note: *The Remaining Amt text box displays the limit amount when the Requisition is first created.*

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows (Position Administration was in use):



Viewing Requisitions online

Use the Requisition - Inquiry By Status And Position form (R12SCR) to display a list of requisitions. You have several options:

- If Position Administration is in use, use the Position list box to view requisitions by position.
- Use the Requisition Status list box to view requisitions by status.
- Leave both list boxes blank to view all requisitions.

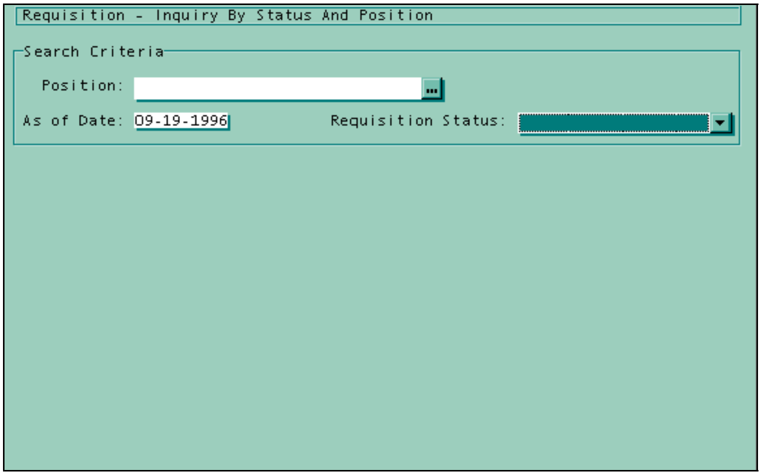
1. Access the Requisition - Inquiry By Status And Position form (R12SCR)

Access this form by making the following selections from the Navigator:

Component:	Requisition Administration
Process:	Requisition Details
Task:	View Requisitions

For practice, access the Requisition - Inquiry By Status And Position form (R12SCR).

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



2. Click the Position list box (if Position Administration is in use)

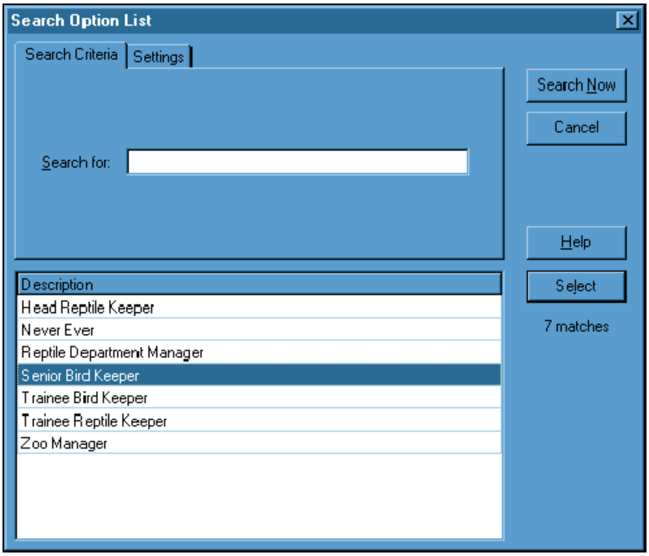
The Search Option List dialog box appears.

For practice, click the Position list box.

3. Click Search Now (Position Administration only)

The results of the search are displayed.

For practice, click Search Now.

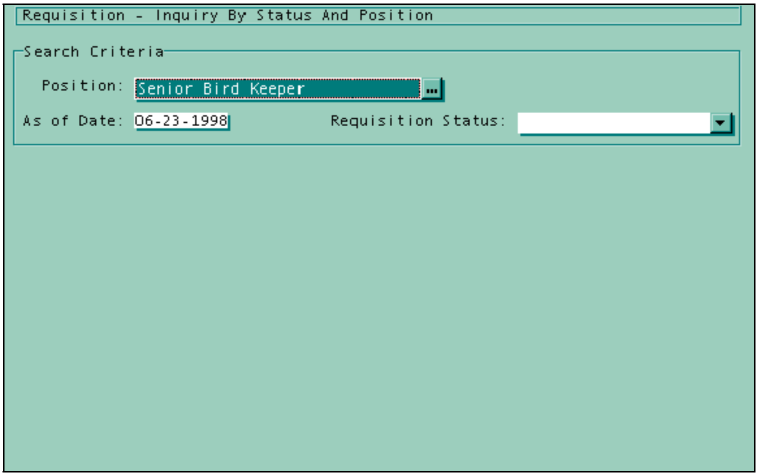


4. Highlight the Position name and click Select (Position Administration only)

You are returned to the Requisition - Inquiry by Status And Position form (R12SCR) with the Position name you selected displayed in the Position list box.

For practice, highlight Senior Bird Keeper and click Select.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



5. Enter As of Date

You can accept the default of today's date or enter another date. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

For practice, accept the default of today's date.

6. Select Requisition Status

Select the status of the requisitions that you wish to view.

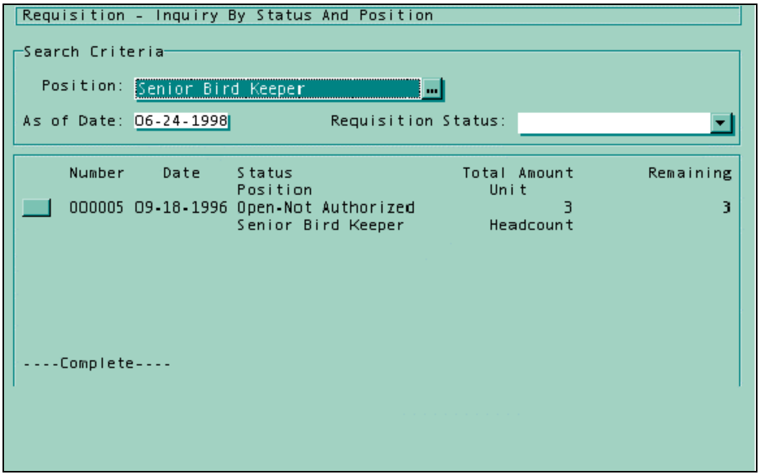
For practice, leave this list box blank.

7. Click Save or press Enter

Information about the new requisition you just created is listed at the bottom of the form.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows (Position Administration was in use):



Viewing Requisitions on hard copy

As an alternative, if Position Administration is in use, schedule the Requisition Details by Position/Organization Unit report (M04RPT) to print a listing of all Requisitions.

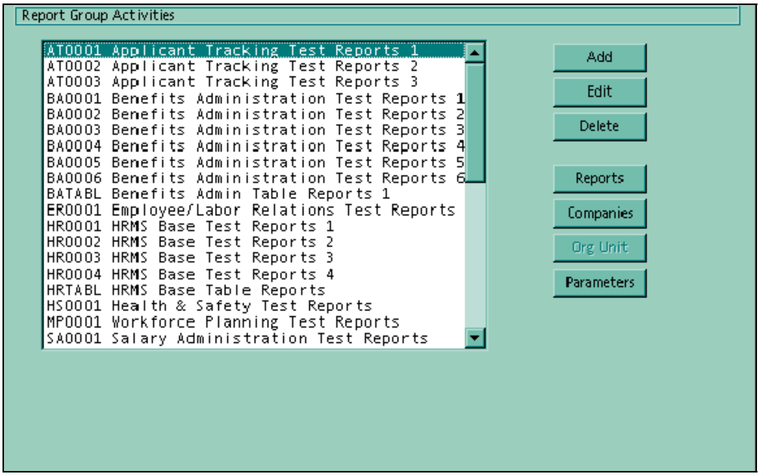
☞ *Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.*

1. Access the Report Group Activities form (RGMSTR)

Access this form by making the following selections from the Navigator:

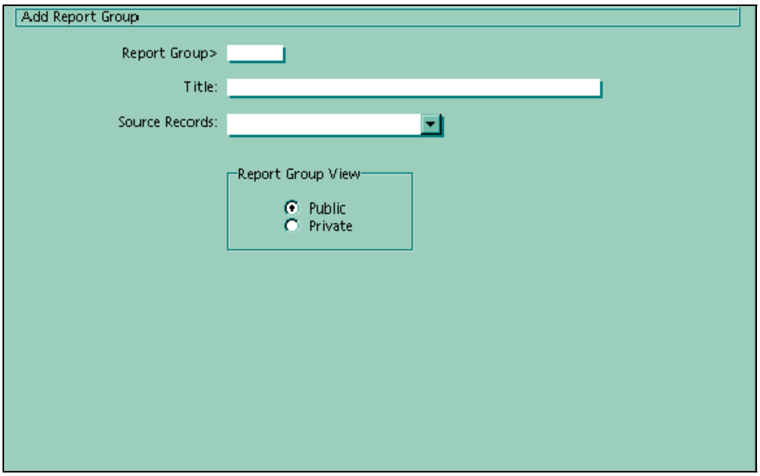
Component:	Reporting
Process:	Report Scheduling
Task:	Schedule Report Groups

For practice, access the Report Group Activities form (RGMSTR).



2. Click the Add command button

The Add Report Group form is displayed.



3. Name the Report Group you are adding

You can enter up to six alphanumeric characters. You will use this report group identifier to initiate the report run or view reports in the report group online.

For practice, type 'RT0001'.

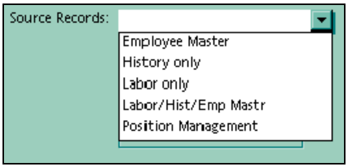
4. Enter the Title of the report group you are adding

You can enter up to 40 alphanumeric characters, so be descriptive. This report group title will be used to identify the report group whenever you are using the Report Group Activities form (RGMSTR).

For practice, type 'Requisition Administration'.

5. Select the type of information you want to process from the Source Records option list

This list box is used to identify the type of information this group of reports will provide.

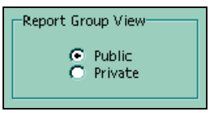


Note: *Requisition Administration and Position Administration reports are run separately from other types of reports because they process data based on a defined Organization Unit rather than Organization. If you want to set up a report group that contains Position Administration reports, you must identify the Source Records as 'Position Management'; otherwise, these reports will not be an option when you move to the next form.*

For practice, select 'Position Management'.

6. Select your Report Group View

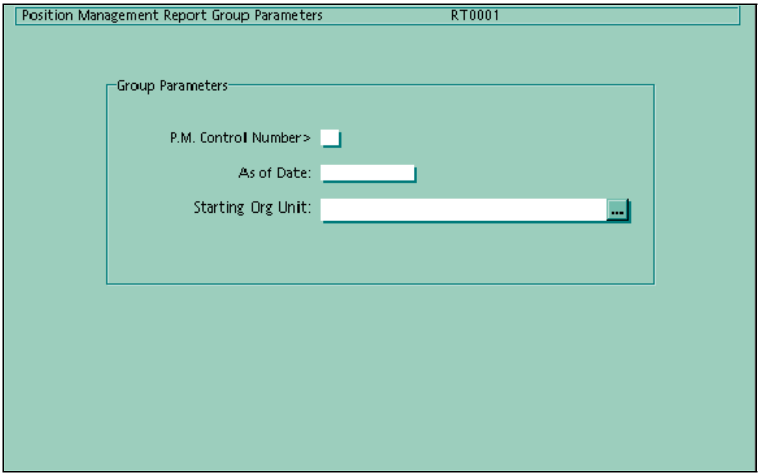
This option defaults to a 'Public' setting, which means the report group you are setting up may be shared with others using the system. Select the 'Private' option button if you do not want to share the new report group with anyone using a User Code different from your own.



For practice, keep the default, 'Public'.

7. Click Save or press Enter

The report group is added and the Position Administration Report Group Parameters form is displayed.



8. Enter P.M. Control Number

Enter the Position Administration Control Number as it is identified on the Organization-To-Rules Cross-Reference For HR form (AX-SCR).

For practice, type '99'.

9. Enter the As of Date (optional)

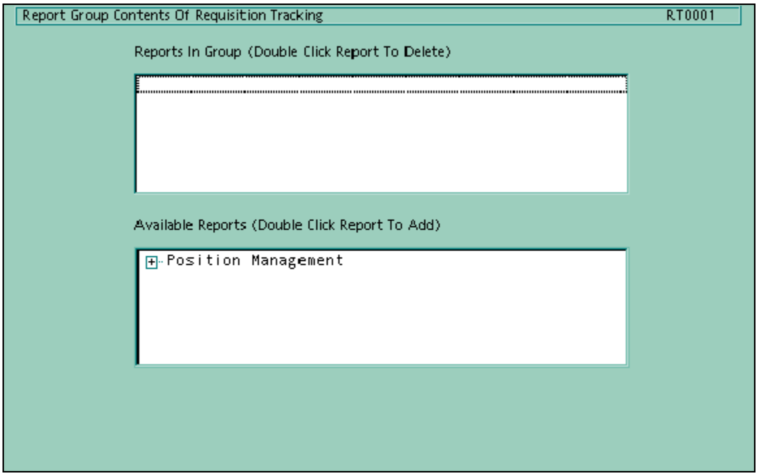
Enter the As of Date for which you want to start reporting. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere). Leave this blank if you want to use the current date.

For practice, type '06-01-1996' (US and Canada) or '01-06-1996' (elsewhere).

10. Click Save or press Enter

The Report Group Contents Of Requisition Administration form is displayed.

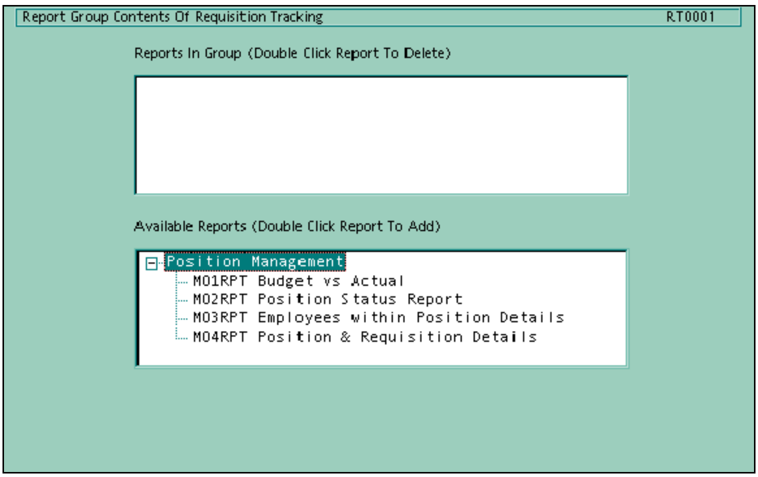
For practice, click Save or press Enter.



11. Double-click Position Management to display available reports

A list of available reports is displayed.

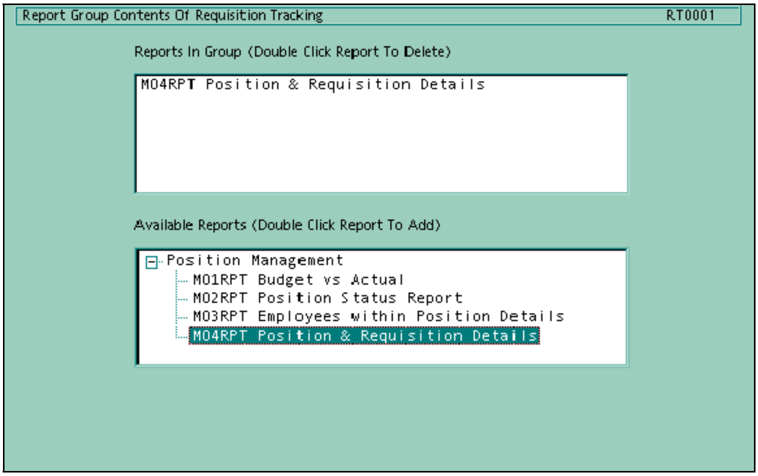
For practice, double-click Position Management.



12. Double-click the report name

Double-click the report name that you would like to add to this report group. The report name will then be displayed in the upper portion of the form.

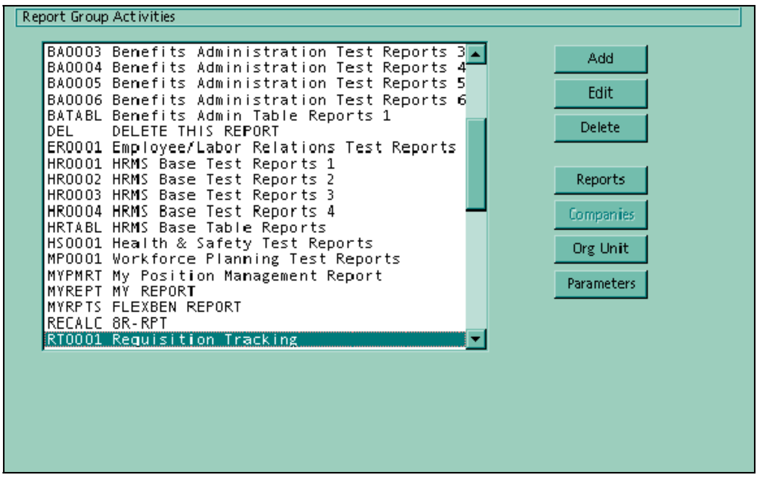
For practice, double-click M04RPT Position & Requisition Details.



13. Click Save or press Enter

The Report Group Activities form (RGMSTR) reappears, with the new report group listed.

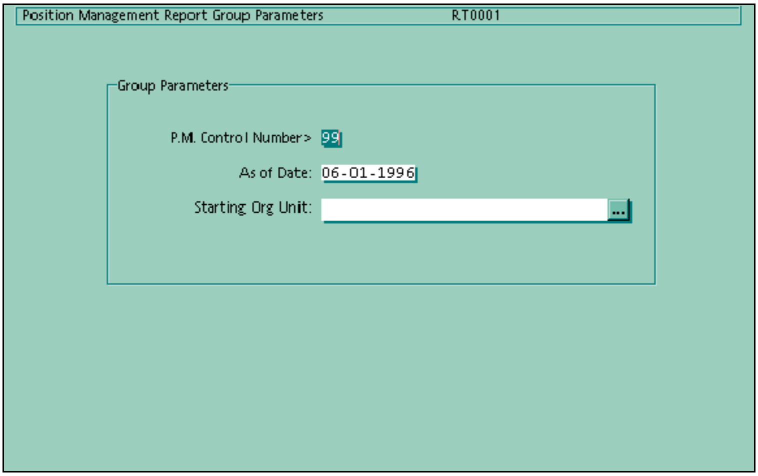
For practice, click Save or press Enter.



14. Click Org Unit

Click the Org Unit button on the Report Group Activities form (RGMSTR) to access the Position Management Report Group Parameters form.

For practice, click Org Unit.



15. Click the Starting Org Unit list box

Click the Starting Org Unit list box to display the Search Option List dialog box.

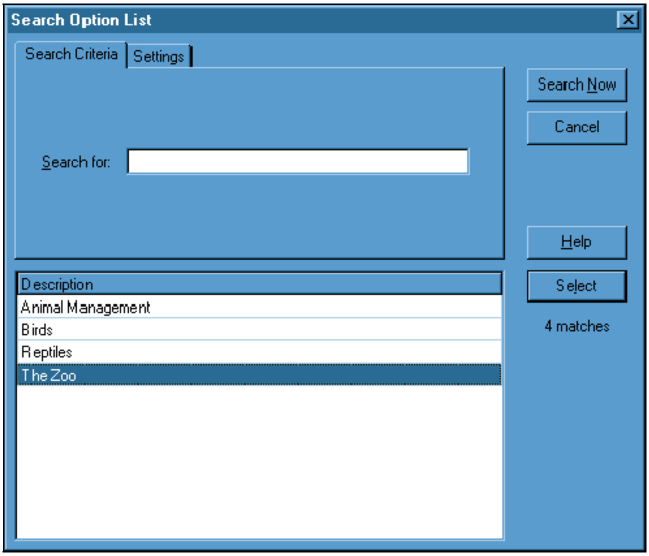
For practice, click the Starting Org Unit list box.

16. Click Search Now

The results of the search are displayed.

Note: *If no matching Requisition records are found, you will see the message, '0 matches'.*

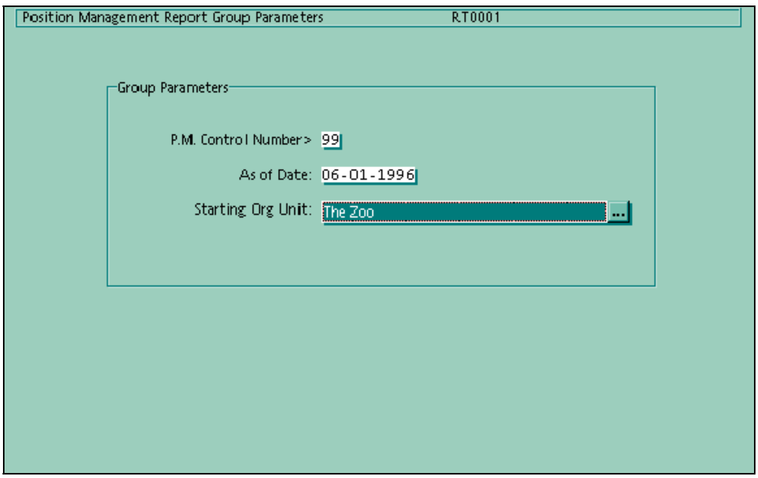
For practice, click Search Now.



17. Highlight the organization name and click Select or press Enter

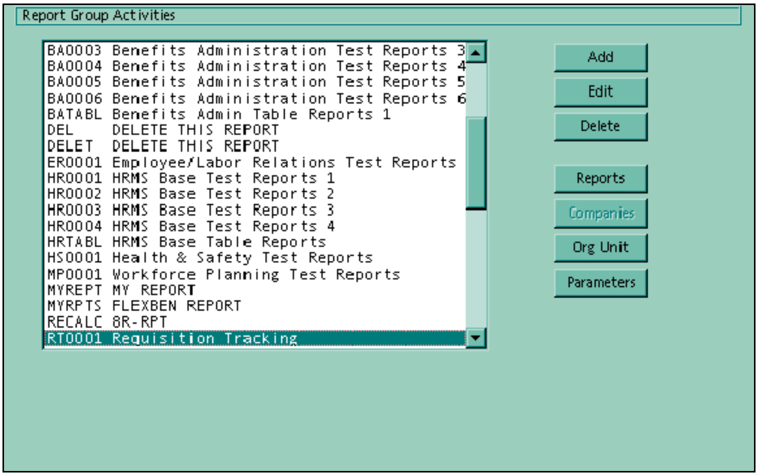
The selected organization name is now displayed in the Starting Org Unit list box.

For practice, highlight The Zoo and click Select.



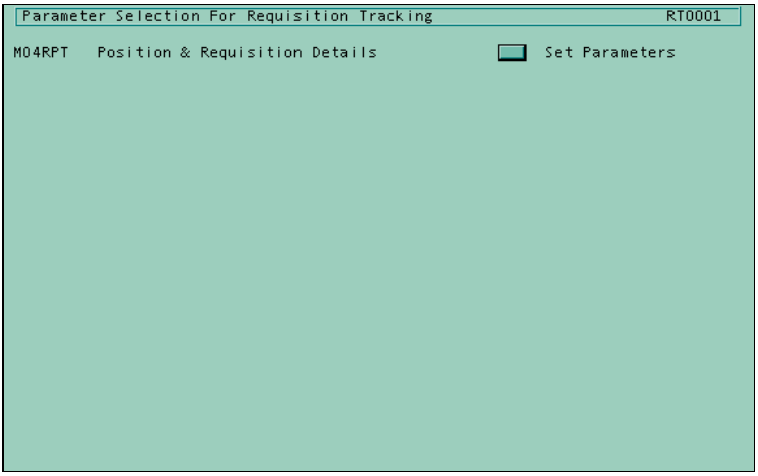
18. Click Save or press Enter

You are returned to the Report Group Activities form (RGMSTR).



19. Highlight the report group name and click Parameters

The Parameter Selection for Requisition Administration form appears.

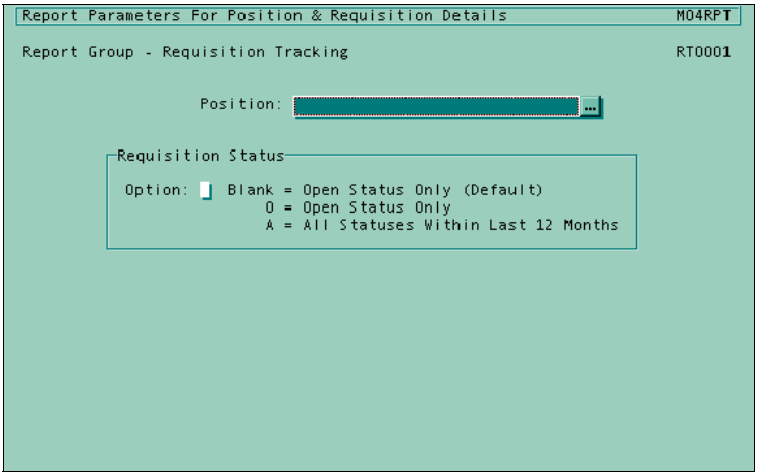


20. Click the Set Parameters command button

A Report Parameters form is displayed for the report you are configuring.

Note: *The Report Parameters form that displays is dependent on which report you are configuring.*

For practice, click the Set Parameters command button for the Position & Requisition Details report.



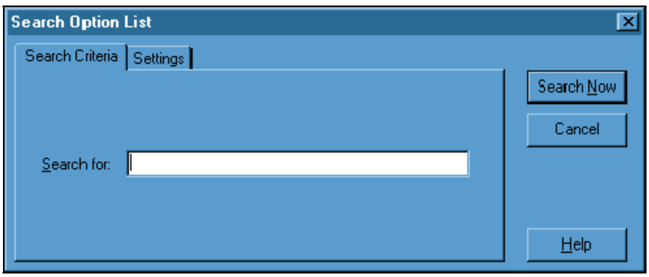
21. Enter Requisition Status

Enter a value in the Requisition Status text box to indicate whether you want a report on open status only, or all status within the last 12 months.

For practice, do not make an entry in the Requisition Status text box.

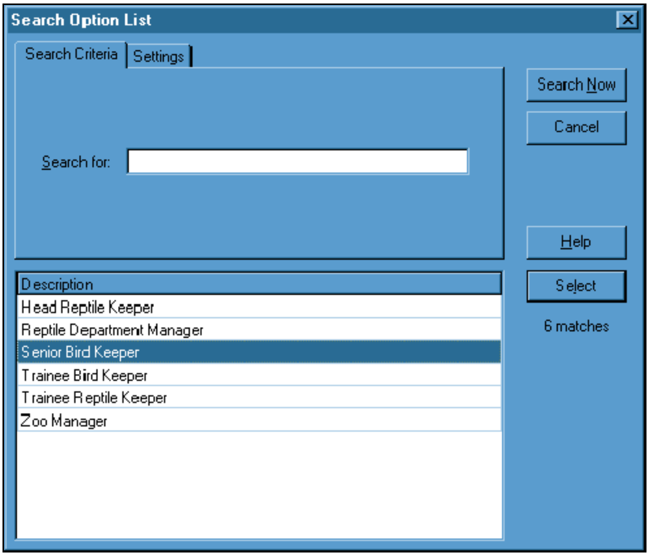
22. Click the Position list box

The Search Option List dialog box is displayed.



23. Click Search Now

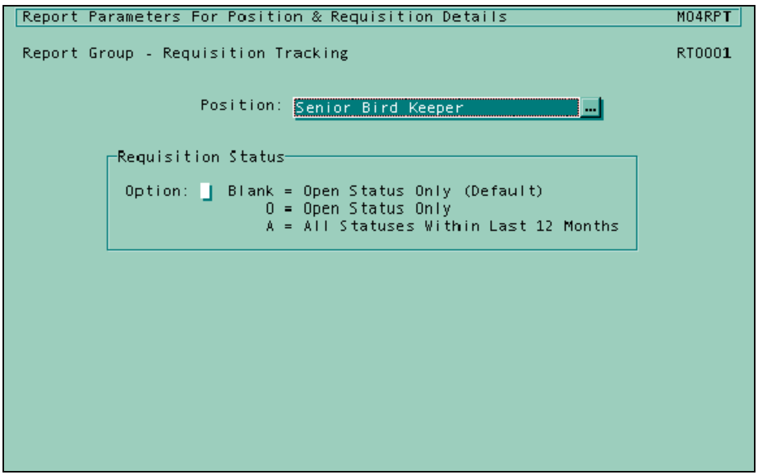
An extended Search Option List dialog box is displayed, listing all of the available positions.



24. Highlight Position name and click Select

Select the appropriate position from the list and click Select.

The Report Parameters for Position & Requisition Details is now displayed with the selected position name appearing in the Position list box.



25. Click Save or press Enter

When a packaged report job set up to run this report group is initiated online or through off-line batch operations, the reports will run as configured.

Refer to the Technical Administration documentation for information about running report groups. The sections that cover initiating a report run in batch, setting up the jobstreams for SUBMIT and VIEW, initiating a report run online, and viewing a help report online should be particularly helpful.

See also:

- Using search criteria ***(on page 54)***

To learn what search criteria you can use

Modifying Requisitions

You may modify a Requisition record by changing the basic details on an existing record or creating a new occurrence for an existing Requisition. To modify a Requisition's basic details, follow these steps:

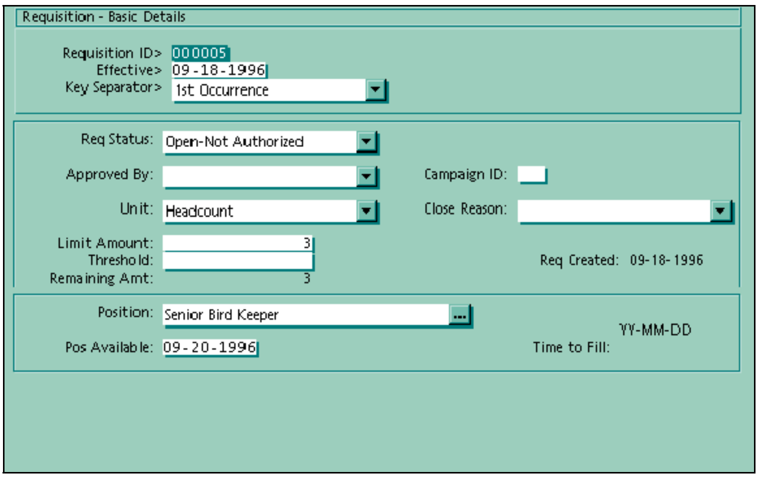
1. Access the Requisition - Basic Details form (R10SCR)

Access this form by making the following selections from the Navigator:

Component: Requisition Administration
Process: Requisition Details
Task: Setup/Maintain a Requisition

Note: *To move quickly between Requisition Administration forms, you can right click a form to access shortcut menu of associated forms.*

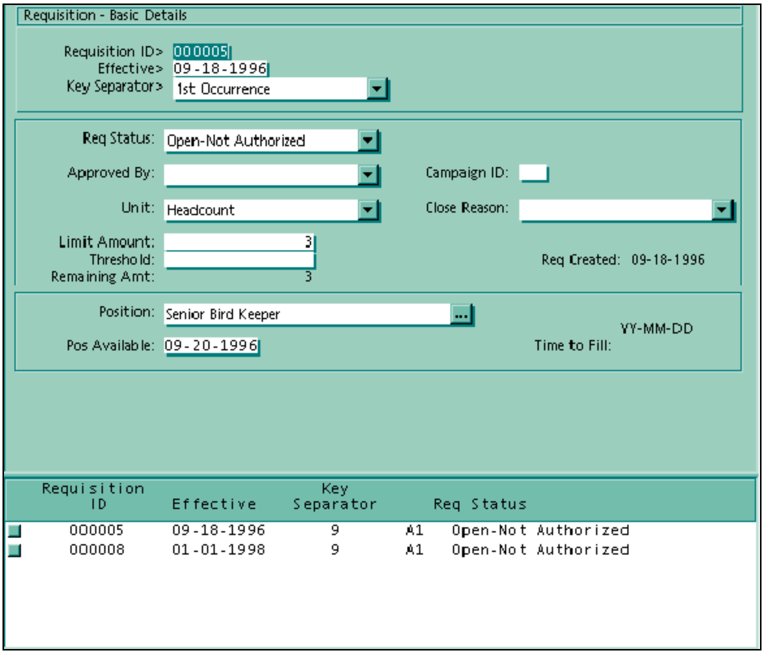
For practice, access the Requisition - Basic Details form (R10SCR).



2. Click the Selection button on the toolbar

Click the Selection button on the toolbar. A list of Requisition records is displayed, beginning with the Requisition ID that was shown on the form.

For practice, click the Selection button.



3. Select the Requisition to be modified

Double-click the Requisition record to be modified. The selected Requisition is displayed.

For practice, select '000005'.

4. Enter the necessary changes

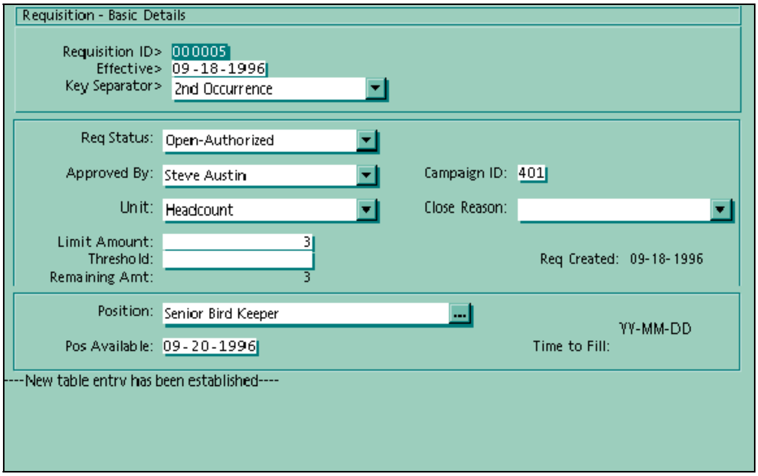
Type or select new entries for the text boxes you wish to modify. Changing the Effective text box and/or incrementing the Key Separator list box value creates a new occurrence for the Requisition ID.

For practice, select '2nd Occurrence' in the Key Separator list box; select 'Open - Authorized' in the Req Status list box; select 'Steve Austin' in the Approved By list box; type '401' in the Campaign ID text box.

5. Click Save or press Enter

The data are modified and a 'Maintenance has been performed' or 'New table entry has been established' message is displayed at the bottom of the form.

For practice, click Save or press Enter.



See also:

■ Requisition status - how and why it can change ***(on page 51)***
To learn about the various status options and how they can change

■ What you can modify ***(on page 53)***
To learn which entries you are allowed to modify

Deleting modified Requisitions

If a change to a Requisition's basic details has been made in error, you will be able to delete that record only if no Requisition Candidates are associated with it. If Requisition Candidates are associated with this Requisition, then you must modify the existing record (if the error is within a non-key text box) or create a new record (if the error is within a key text box).

Warning: Performing this task deletes the modified Requisition record permanently. No history of the entry is kept.

1. Access the Requisition - Basic Details form (R10SCR)

Access this form by making the following selections from the Navigator:

Component: Requisition Administration
Process: Requisition Details
Task: Setup/Maintain a Requisition

For practice, access the Requisition - Basic Details form(R10SCR).

2. Click the Selection button in the toolbar

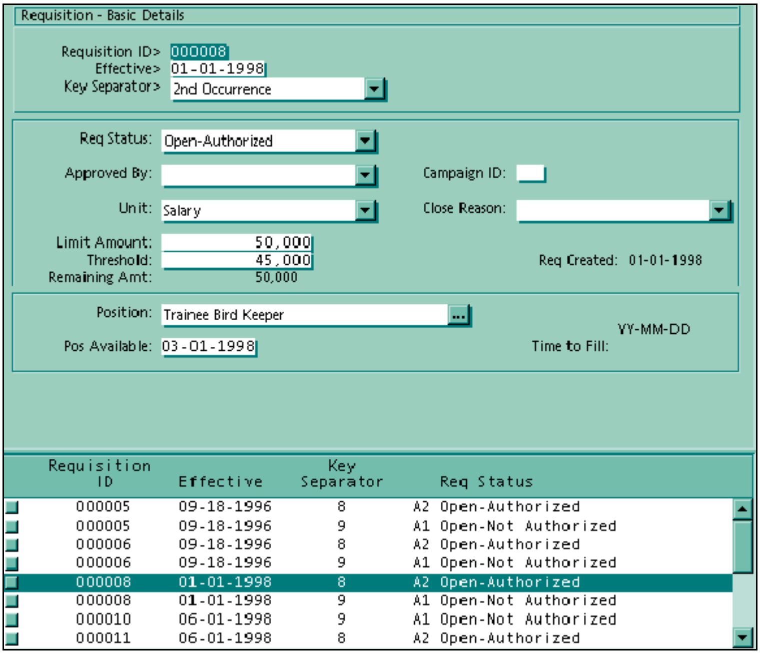
Click the Selection button in the toolbar. A list of Requisition records is displayed.

For practice, click the Selection button in the toolbar.

3. Select the Requisition record you want to delete

Double-click the Requisition to be deleted. The selected Requisition is displayed.

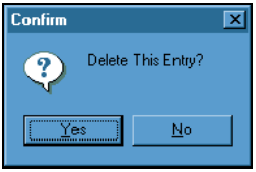
For practice, select '000008' with the Req Status of 'Open Authorized'.



4. Click the Del Entry button on the toolbar

Click the Del Entry button on the toolbar.

The Delete This Entry? dialog box is displayed, warning you that continuing this process will permanently delete the Requisition record.



For practice, click the Del Entry button on the toolbar.

5. Click Yes or press Enter

Click the **Y**es command button or press Enter to delete the Requisition record.

The 'Table record has been deleted' message is displayed. The record displayed is now the first Requisition record on the file.

For practice, click the Yes command button.

See also:

- **What you can modify *(on page 53)***

To learn which fields you are allowed to modify

Extended Practice

1. Create two Requisitions.

   Facts: Effective today, you received two new Requisitions. The first Requisition is to fill one Trainee Reptile Keeper vacancy. The maximum salary for the Trainee Reptile Keeper Requisition is $50,000, with a Threshold of $45,000.

   The second Requisition is to fill four Trainee Bird Keeper vacancies.

Note: *When setting up Requisitions for the first time, the Requisition status selected must be Open - Not Authorized.*

2. View the two newly created Requisitions.

   a) View the Trainee Reptile Keeper Requisition using the Position and 'as of' date options. What displays on the form?

   b) View the Trainee Bird Keeper Requisition using the Position and the Requisition Status option. What displays on the form?

   c) What would happen if a match could not be found?

3. Authorize both Requisitions and add the Campaign ID text box.

4. Delete the modified Requisition for the Trainee Reptile Keeper.

Review of Questions Answered

1. How and why can a Requisition status change?

2. What can you do to rectify a change made in error to a Requisition's basic details?

3. How do Requisition Administration and Position Administration interact?

CHAPTER 6

Creating and Maintaining Requisition Candidates

In This Chapter

Introduction

After you have established the Requisitions that represent your vacancies, you can begin the process of assigning Requisition Candidates to each of them. This section describes the key concepts and tasks associated with creating Requisition Candidates and subsequently viewing, amending, or deleting them.

Tasks

The following tasks are covered in this section:

- Creating Requisition Candidates
- Viewing Requisition Candidates
- Modifying Requisition Candidates
- Viewing Modified Requisitions
- Deleting Requisition Candidates

Prerequisites

Before you can carry out any of the tasks described in this section, the following tasks must have been completed:

- Ensure that Requisition Administration implementation tasks have been completed.

☞ *Refer to* **Implementing Requisition Administration** *(on page 29) for more information about this task.*

- Requisitions must be established prior to creating Requisition Candidates. Each Requisition Candidate must be associated with a Requisition.

☞ *Refer to* **Creating and Maintaining Requisitions** *(on page 45) for more information about this task.*

Questions answered

The following questions are answered in this section:

1. What methods are available for creating Requisition Candidate records?
2. How and why can a Requisition Candidate status change?
3. What can be modified on a Requisition Candidate record?

Methods of creating Requisition Candidates

Requisition Candidates can be created manually using the Requisition Candidate - Basic Details form (R11SCR) or automatically using the Job Or Position Applied For form (003SCR). Up to 9,999 candidates may be recorded for a single Requisition.

Requisition Candidates created in either of these ways have a default status of Candidate unless the Requisition status is Closed. If the associated Requisition status is Closed, the form appears in Display mode only with a message that reads, 'Warning—This Requisition has a status of Closed'.

Both Requisition Administration and Applicant Administration reject the Requisition Candidate record if no matching Requisition exists on the file. In a situation where, as an exception, there is no actual Requisition for a Position, you may need to set up a pool Requisition to handle the exception.

If you attempt to create a candidate record with a date earlier than the associated Requisition, it is rejected.

If the Requisition Remaining Amount is less than the Requisition Candidate's Budget Amount, a Warning or Reject message appears that reads, 'Candidate amount exceeds remaining limit'. If you override this warning, the process continues.

You may create a Requisition Candidate using the Job Or Position Applied For form (003SCR), which is accessible to all organizations, to allow existing employees or applicants on file to be candidates for Positions. This allows for internal Job postings. When executed, this program creates a Requisition Candidate - Basic Details record (R11SCR) for the employee or applicant. Its text boxes are copied to the respective candidate text boxes, defaulting to the first occurrence for the date entered. The Candidate Status is displayed as Candidate. When you select a candidate created in this way, you must then access the established Requisition Candidate - Basic Details form (R11SCR) and add the Budget Amount.

If a Job Or Position Applied For form (003SCR) has been created in error—for instance, the Requisition ID or date was incorrect—you may delete the entry and create a new one as long as no modified Requisition Candidate records have been added.

See also:

■ Single and multiple vacancies ***(on page 47)***
For more information on single and multiple vacancies.

Apply the Concept

True or False. Explain any false answers.

a) Both Requisition Administration and Applicant Administration will reject a candidate record if no matching Requisition exists on the file.

b) You can create a Requisition Candidate record in any organization by using the Job Or Position Applied For form (003SCR).

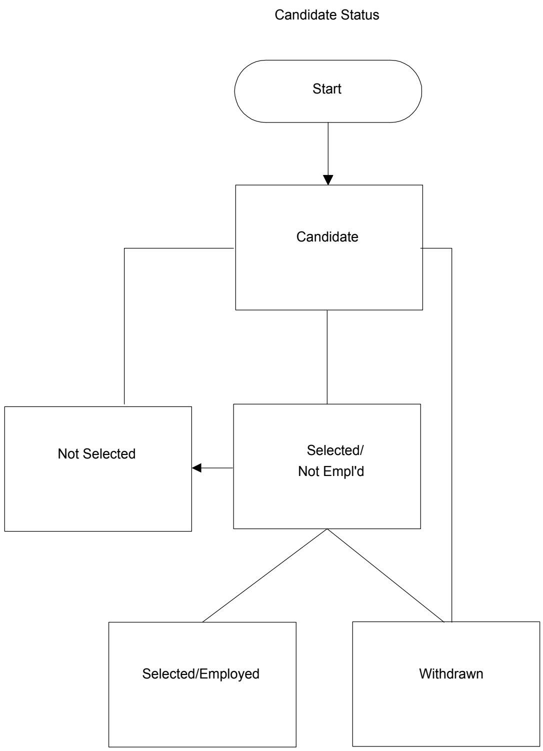
c) Requisition Candidate records can be added even if the associated Requisition status is Closed.

Requisition Candidate status - how and why it can change

Each Requisition Candidate has one of the following status options:

- Candidate
- Selected/Not Empl'd
- Selected/Employed
- Not Selected
- Withdrawn

The following chart represents the event sequence for Candidate status:



When a Requisition Candidate is first created, its status is Candidate. The Requisition Candidate status can be changed manually or automatically as the result of other processes.

You must manually change the status of Requisition Candidates who have been rejected to Not Selected. If a candidate has been offered a Position, you must manually change the status to Selected/Not Empl'd. If a candidate notifies you that he or she no longer has an interest in the Position, you must manually change the status to Withdrawn.

The Requisition Candidate status can also change because of other processes. If the Requisition status changes to Closed because all the vacancies have been filled, Requisition Candidates with a Candidate status are changed to Not Selected.

The Requisition Candidate status can also be changed as a result of entries made on these forms:

- Incumbency - Basic Details form (M40SCR)
- Set Up A New Employee form (NH-SCR)
- Employee Information form (EF-SCR)
- Applicant Transfer form (ET-SCR)

See also:

- Requisition and Requisition Candidate status options ***(on page 20)***

For more information on status options.

- Changed Procedures When Using Requisition Administration ***(on page 107)***

For more information on changed procedures.

Apply the Concept

Consider your current candidate process. Describe the tasks and decisions your organization would make to implement Requisition Administration.

Apply the Concept

True or False. If false, explain.

When first created, a Requisition Candidate's status must be Selected/Not Empl'd.

What you can modify

If you change the Status list box on the Requisition Candidate - Basic Details form (R11SCR), you will be prompted to also change either the Effective Date or the Key Separator for the Requisition Candidate.

You may create a new occurrence and manually change the Status list box to any other option except Selected/Employed. That change may take place only through the hiring process.

If you change the Status from Candidate to Selected/Not Empl'd:

- The Requisition status must be Open - Authorized; otherwise, a Reject message is displayed that reads, 'Requisition Status does not allow selection'.
- The Budget Amount may not exceed the Requisition Remaining Amount; otherwise, a message is displayed that reads, 'Candidate amount exceeds remaining limit'.
- The Requisition Remaining Amount text box is updated.

Once a Requisition Candidate has a status of Selected/Not Empl'd or Selected/Employed, any changes that you make to the FTE, Hours, Headcount, or Salary are checked to determine whether the new value is within the Requisition Limit. The Budget Amount must be equal to or less than the Requisition Remaining Amount; otherwise, a message is displayed that reads, 'Candidate Amount causes Requisition Limit to be exceeded'. Changes to the Requisition Candidate Budget Amount can not be made if the Requisition status is Closed.

If a Requisition Candidate's basic details have been established in error, that record should be deleted. However, the record can only be deleted if no modified Requisition Candidate records are associated with it.

See also:

- Modifying External and Internal Candidates ***(on page 96)***

For more information on modifying Requisition Candidates.

Using search criteria

After Requisition Candidate records have been created for vacancies, you may view selected Requisition Candidates. You may use the Requisition - Inquiry By Candidate Status form (R13SCR) to search by any two or all three of the following criteria:

- By Requisition ID
- By As of Date
- By Candidate Status

For example, you can view all Requisition Candidate records with a Requisition status of Candidate, for the Position of Zoo Manager, as of August 6, 1996.

After you enter your selection criteria and execute the form, the matching records display in list form in the body of the form. A button to the left of each matching Requisition Candidate record allows you to navigate to the Requisition Candidate - Basic Details form (R11SCR) for the record selected.

If you enter	**The result is**
Requisition ID and As of Date	A form display of only those Requisition Candidate records with a matching Requisition ID and As of Date. If no date is entered, the current date is used.
Candidate Status and As of Date	A form display of only those Requisition Candidate records with a matching Candidate Status and As of Date.
Requisition ID, Candidate Status, and As of Date	Records that match the specified Requisition ID and As of Date are located first. Within those selected records, any records that match the Candidate Status are then selected for display.

If no matching Requisition records are found, you will see the message 'Complete' at the bottom of the form.

If more requisitions are found than can be displayed on the form, click the More button to continue viewing Requisition Candidate information.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Creating a Requisition Candidate from an External Candidate

To create a Requisition Candidate from an external candidate, complete the following steps:

1. Access the Requisition Candidate - Basic Details form (R11SCR)

Access this form by making the following selections from the Navigator:

Component: Requisition Administration
Process: Requisition Details
Task: Requisition Candidate Details

For practice, access the Requisition Candidate - Basic Details form (R11SCR).

2. Click the New Candidate command button

Click the New Candidate button at the command bottom of the form. The Requisition Candidate - Basic Details form (R11SCR) is cleared and ready for the entry of a new Requisition Candidate.

For practice, click the New Candidate command button.

3. Enter the Requisition ID

Type an existing alphanumeric Requisition ID up to six characters in length.

For practice, type '000005'.

4. Enter the Effective (Date)

Type the Effective date for the Requisition Candidate. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere). As an alternative, position the pointer in the Effective text box and right click to display the calendar or insert today's date.

If the Effective date is earlier than the Requisition-created date, an error message is displayed. Repeat this step, typing a different date.

For practice, type '10-01-1996' (US and Canada) or '01-10-1996' (elsewhere).

5. Enter the candidate's Name

For external candidates, type the candidate's full name in the format Last Name comma space First Name (for example, Smith, John).

For practice, type 'Jones, Elizabeth'.

6. Enter the Org (optional)

For external candidates, leave this text box blank.

For practice, leave this text box blank.

7. Enter the Number (optional)

For external candidates, leave this text box blank.

For practice, leave this text box blank.

8. Select the Status

Select an option from the Requisition Candidate Status list box.

This form may not be used to change the status to Selected/Employed. That change can take place only through hiring or transferring the candidate into a vacancy.

For practice, select 'Candidate'.

9. Enter the Amount

Type a unit amount for the Requisition Candidate. The format in which you enter the amount depends on the unit of measure you are using:

Unit of measure	Format you must use
FTE or Hours	Type an up-to-seven-digit figure with two decimal places. For example: 99,999.99
Headcount	Type an up-to-six-digit figure. For example: 999,999
Salary	Type an up-to-12-digit figure. For example: 999,999,999,999

For practice, type '1'.

10. Click Save or press Enter

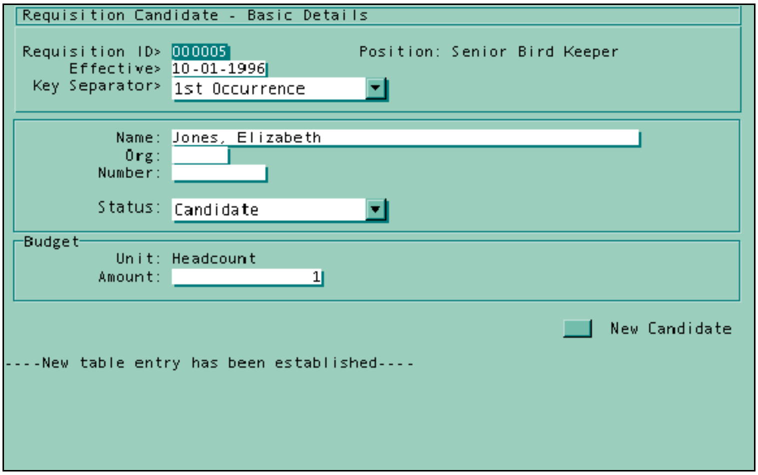
If the Remaining Amount on the Requisition is less than the Requisition Candidate's Amount, a Warning or Reject message is displayed that reads, 'Candidate amount exceeds remaining limit'. If it is a Warning, and is overridden, the process continues.

The data is entered and a 'New table entry has been established' message is displayed at the bottom of the form.

Note: *A new list box, Key Separator, is displayed. This is provided to record Requisition Candidate changes when more than one occurs on the same date.*

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Understanding Requisitions and Requisition Candidates ***(on page 15)***

For explanation of Requisitions and Requisition Candidates.

Creating a Requisition Candidate from an Internal Candidate

To create a Requisition Candidate from an internal candidate, complete the following steps:

1. Access the Requisition Candidate - Basic Details form (R11SCR)

Access this form by making the following selections from the Navigator:

Component:	Requisition Administration
Process:	Requisition Details
Task:	Requisition Candidate Details

For practice, access the Requisition Candidate - Basic Details form(R11SCR).

2. Click the New Candidate command button

Click the New Candidate command button at the bottom of the form. The Requisition Candidate - Basic Details form (R11SCR) is cleared and ready for the entry of a new Requisition Candidate.

For practice, click the New Candidate command button.

3. Enter the Requisition ID

Type an existing alphanumeric Requisition ID up to six characters in length.

For practice, type '000005'.

4. Enter the Effective (Date)

Type the Effective Date for the Requisition Candidate. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere). As an alternative, position the pointer in the Effective text box and right click to display the calendar or insert today's date.

If the Effective Date is earlier than the Requisition-created date, an error message is displayed. Repeat this step, typing a different date.

For practice, type '10-06-1996' (US and Canada) or '06-10-1996' (elsewhere).

5. Enter the candidate's Name

For internal candidates, this text box propagates if the Organization and Number are entered.

For practice, leave this text box blank.

6. Enter the Org (optional)

Type the organization designation associated with the internal candidate.

For practice, type '999999'.

7. Enter the Number (optional)

Type the employee number associated with the candidate.

For practice, type '6001'.

8. Select the Status

Select an option from the Requisition Candidate Status list box.

This form may not be used to change the status to Selected/Employed. That change can take place only through hiring or transferring the candidate into a vacancy.

For practice, select 'Candidate'.

9. Enter the Amount

Type a unit amount for the Requisition Candidate. The format in which you enter the amount depends on the unit of measure you are using:

Unit of measure	Format you must use
FTE or Hours	Type an up-to-seven-digit figure with two decimal places. For example: 99,999.99
Headcount	Type an up-to-six-digit figure. For example: 999,999
Salary	Type an up-to-12-digit figure. For example: 999,999,999,999

For practice, type '1'.

10. Click Save or press Enter

If the Remaining Amount on the Requisition is less than the Requisition Candidate's Amount, a Warning or Reject message is displayed that reads, 'Candidate amount exceeds remaining limit'. If it is a Warning, and is overridden, the process continues.

The data is entered and a 'New table entry has been established' message is displayed at the bottom of the form.

Note: *A new list box, Key Separator is displayed. This is provided to record Requisition Candidate changes when more than one occurs on the same date.*

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:

Viewing Requisition Candidates

You can use the Requisition - Inquiry By Candidate Status form (R13SCR) to view Requisition Candidates.

1. Access the Requisition - Inquiry By Candidate Status form (R13SCR)

Access this form by making the following selections from the Navigator:

Component: Requisition Administration
Process: Requisition Details
Task: View Requisition Candidates

For practice, access the Requisition - Inquiry By Candidate Status form (R13SCR).

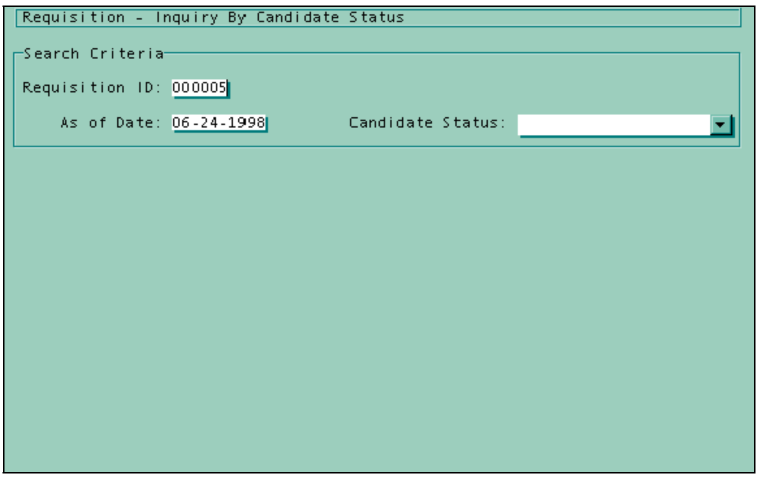
2. Enter the search criteria

You can search by:

- Requisition ID and As of Date
- Candidate Status and As of Date
- Requisition ID, As of Date, and Candidate Status

For practice, type '000005' in the Requisition ID text box.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:

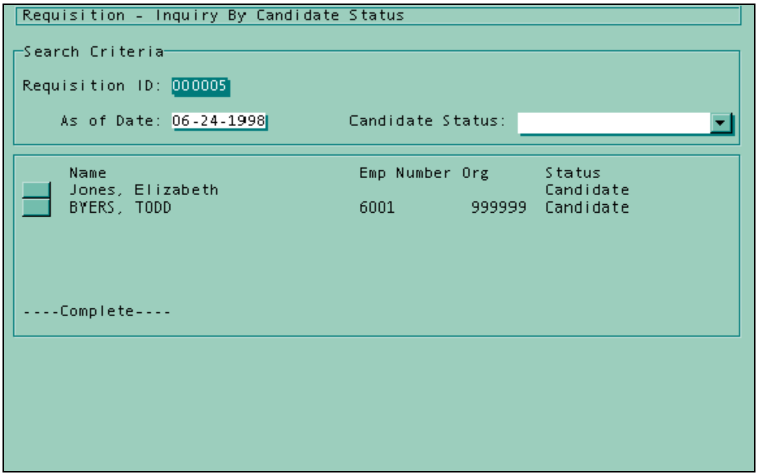


3. Click Save or press Enter

The results of the search are displayed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:

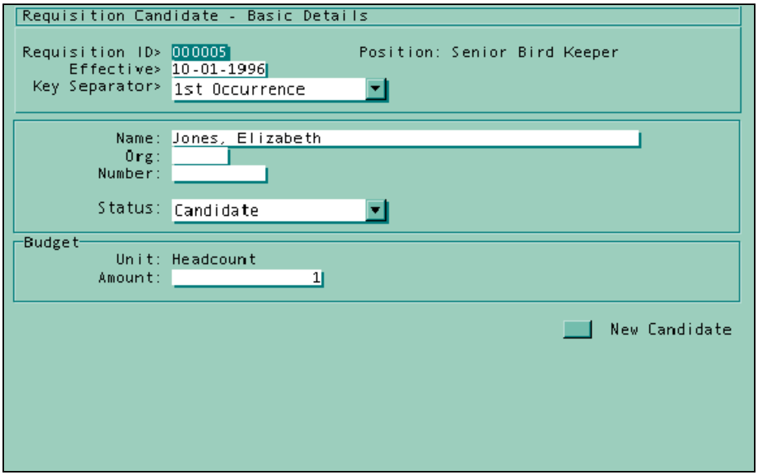


4. Click the button to the left of a candidate

The Requisition Candidate - Basic Details form (R11SCR) for that candidate will be displayed.

For practice, click the button to the left of Elizabeth Jones.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Using search criteria ***(on page 54)***

For more information on using search criteria.

Modifying External and Internal Candidates

To modify an external Requisition Candidate's basic details, follow these steps:

1. Access the Requisition Candidate - Basic Details form (R11SCR)

Access this form from the Navigator by selecting:

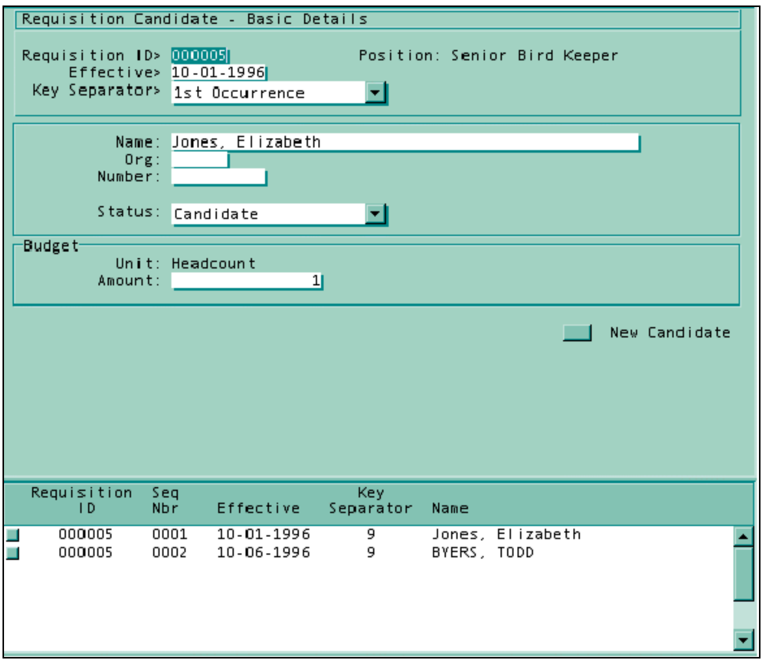
Component: Requisition Administration
Process: Requisition Details
Task: Requisition Candidate Details

For practice, access the Requisition Candidate - Basic Details form (R11SCR).

2. Click the Selection button in the toolbar

Click the Selection button in the toolbar. A list of Requisition Candidate records is displayed, beginning with the Requisition ID that was shown on the form.

For practice, click the Selection button.



3. Select the Requisition Candidate to be modified

Double-click the Requisition Candidate record to be modified. The selected Requisition Candidate record is displayed.

For practice, select Requisition ID 000005 for Elizabeth Jones.

4. Enter the necessary changes

Type or select new entries for the text boxes you wish to modify. Changing the Requisition ID or Effective text box creates a new occurrence for the Requisition Candidate.

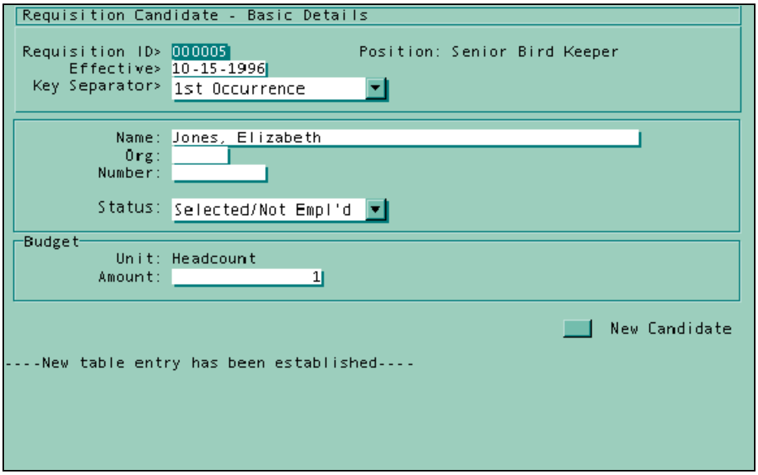
For practice, change the Effective text box to '10-15-1996' and change the Status list box to 'Selected/Not Emply'd'.

5. Click Save or press Enter

The data is modified and a 'Maintenance has been performed' or 'New table entry has been established' message is displayed at the bottom of the form.

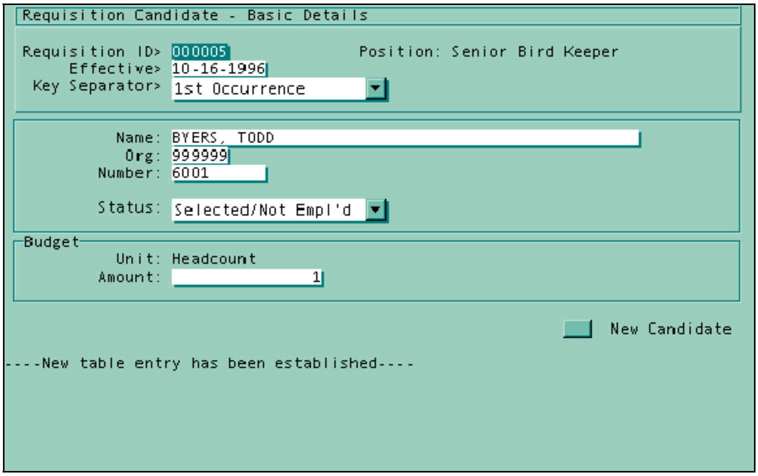
For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



For practice, select Requisition ID 000005 for Todd Byers. Change the Effective text box to '10-16-1996' and change the Status list box to 'Selected/Not Emply'd'.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



Adding a Candidate from Applicant Tracking

To add a Candidate from Applicant Administration, follow these steps:

1. Access the Job Or Position Applied For form (003SCR)

Access this form from the Navigator by selecting:

Component:	Employee Resourcing
Process:	Recruit and Select Employees
Task:	Update Applicant Status

For practice, access the Job Or Position Applied For form (003SCR) for organization 993333 and employee A003.

2. Enter Requisition ID

Enter the requisition ID in the Requisition ID text box.

For practice, type '000005'.

3. Enter Date 1st Considered

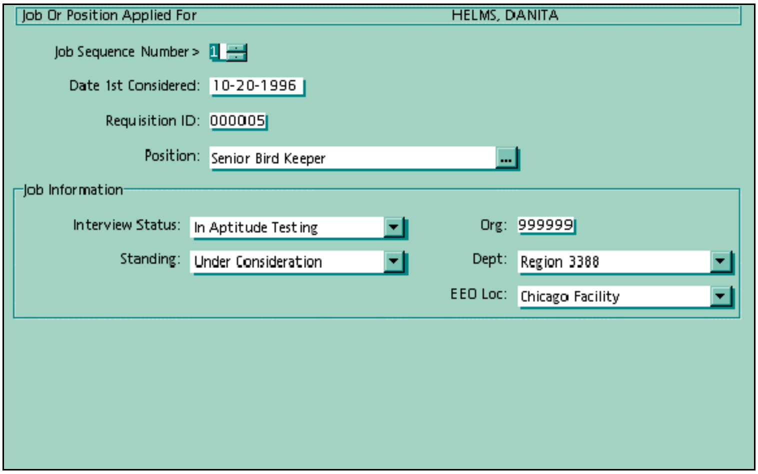
Type the effective date for the requisition candidate. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

For practice, type '10-20-1996' (US and Canada) or '20-10-1996' (elsewhere).

4. Click Save or Press Enter

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



5. Access the Requisition Candidate - Basic Details form (R11SCR)

Access this form from the Navigator by selecting:

Component: Requisition Administration
Process: Requisition Details
Task: Requisition Candidate Details

For practice, access the Requisition Candidate - Basic Details form (R11SCR).

6. Click the Selection button in the toolbar

Click the Selection button in the toolbar. A list of Requisition Candidate records is displayed, beginning with the Requisition ID that was shown on the form.

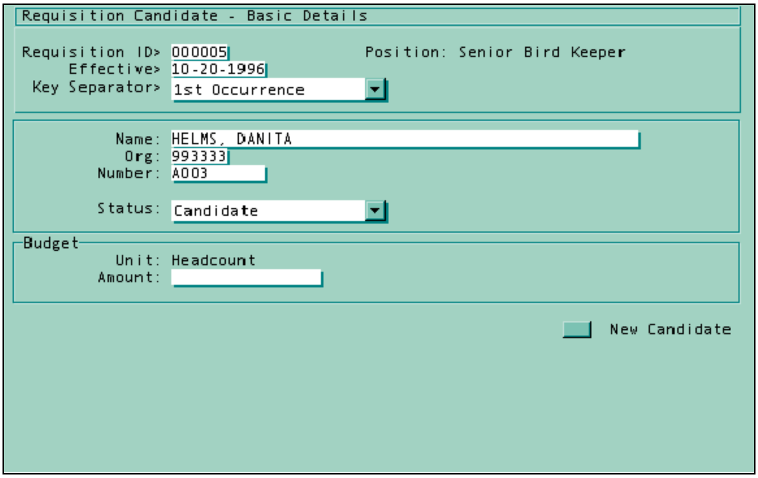
For practice, click the Selection button.

7. View the Requisition Candidate that was created

Double-click the Requisition Candidate record that was created. The selected Requisition Candidate record is displayed.

For practice, select Requisition ID 000005 for Danita Helms.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



8. Modify the record

Type or select new entries for the text boxes you wish to modify. Changing the Requisition ID or Effective text box creates a new occurrence for the Requisition Candidate.

For practice, change the Key separator to 2nd occurrence, change the Effective text box to '11-15-1996' and change the Status list box to 'Selected/Not Emply'd'.

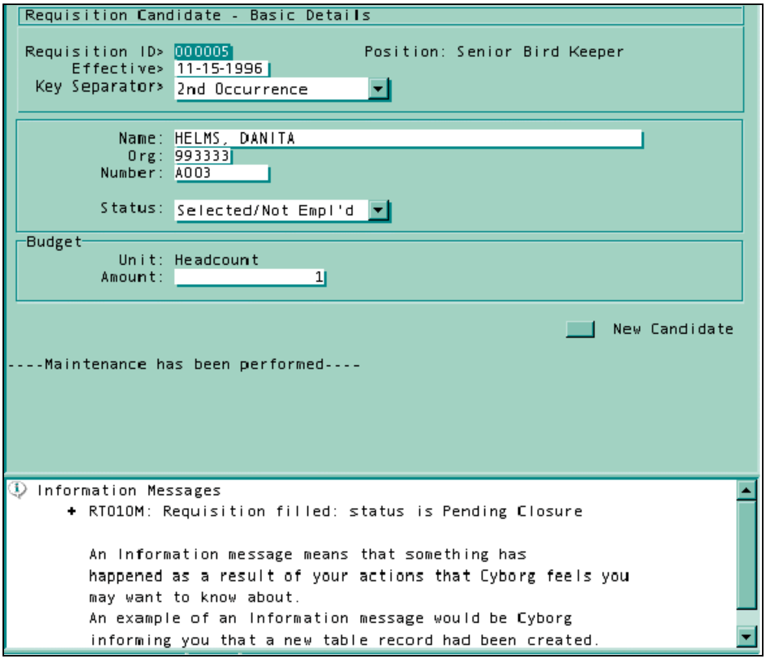
9. Click Save or press Enter

The data is modified and a 'Maintenance has been performed' or 'New table entry has been established' message is displayed at the bottom of the form.

Also, if this modification caused the Requisition limit amount or threshold to be reached, a message appears showing that the requisition's status has automatically been changed to Pending Closure.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Requisition Candidate status - how and why it can change ***(on page 85)***

For more information on Requisition Candidate status.

- **What you can modify** ***(on page 53)***

For more information on when you can modify Requisition Candidate status.

Viewing the Modified Requisition

After you have reached the Requisition limit amount or threshold, the status of the Requisition is automatically changed from Open-Authorized to Pending Closed.

1. Access the Requisition - Basic Details form (R10SCR)

Access this form by making the following selections from the Navigator:

Component:	Requisition Administration
Process:	Requisition Details
Task:	Setup/Maintain a Requisition

For practice, access the Requisition - Basic Details form (R10SCR).

2. Click the Selection button on the toolbar

Click the Selection button on the toolbar. A list of Requisition records is displayed.

For practice, click the Selection button.

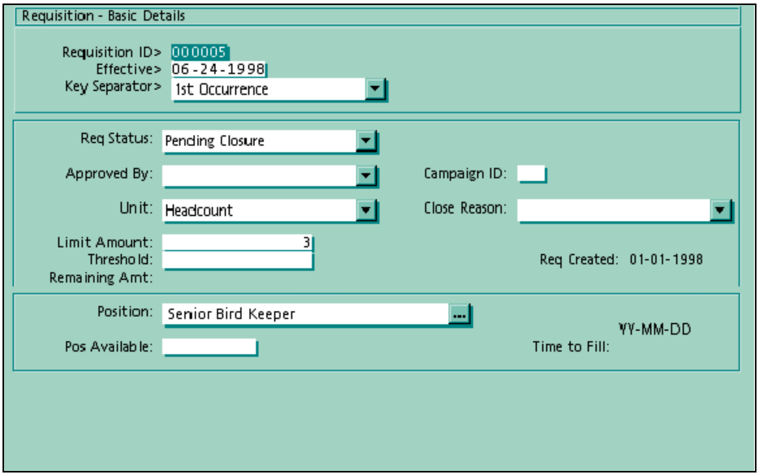
3. Select the Requisition to view

Double-click the Requisition record to be viewed. The selected Requisition is displayed.

The Req Status list box is automatically changed to Pending Closure when the Requisition limit amount or threshold is reached.

For practice, select '000005'.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



Deleting Requisition Candidates

You should delete a Requisition Candidate record only if it was created in error.

Warning: Performing this task deletes the modified Requisition Candidate record permanently. No history of the entry is kept.

1. Access the Requisition Candidate - Basic Details form (R11SCR)

Access this form from the Navigator by selecting:

Component:	Requisition Administration
Process:	Requisition Details
Task:	Requisition Candidate Details

For practice, access the Requisition Candidate - Basic Details form (R11SCR).

2. Click the Selection button on the toolbar

Click the Selection button on the toolbar. A list of Requisition Candidate records is displayed.

For practice, click the Selection button on the toolbar.

3. Select the Requisition Candidate record you want to delete

Double-click the Requisition Candidate to be deleted. The selected Requisition Candidate record is displayed.

For practice, select Requisition ID '000005' dated '10-01-1996' for 'Elizabeth Jones'.

4. Click the Del Entry button on the toolbar

The Delete dialog box is displayed, warning you that continuing this process will permanently delete the Requisition Candidate record.

For practice, click the Del Entry button on the toolbar.

5. Click Yes or press Enter

Click the **Y**es command button or press Enter to delete the Requisition Candidate record.

The Requisition Candidate record is deleted and a 'Table record has been deleted' message is displayed. The record displayed is now the first Requisition Candidate record on the file.

All calculation text boxes are recalculated for the Requisition, and the Requisition status is changed, if appropriate.

For practice, click the Yes command button.

See also:

- What you can modify ***(on page 53)***

For more information on modifying Requisition Candidate status.

Extended Practice

1. Create two Requisition Candidate records.

   Facts: Effective today, you received two Requisition Candidates for the Trainee Bird Keeper Position. One is an external candidate, and one is an internal candidate.

2. Modify each of the Requisition Candidate records to show that they have been Selected.

3. View the Trainee Bird Keeper Requisition Candidate records using the Requisition ID and 'as of' date options. What displays on the form?

Review of Questions Answered

1. What methods are available for creating Requisition Candidate records?

2. How and why can a Requisition Candidate status change?

3. What can be modified on a Requisition Candidate record?

CHAPTER 7

Changed Procedures when using Requisition Administration

In This Chapter

Introduction

This section explains the existing procedures and processes that have changed when using Requisition Administration. Some of the changes require the entering of additional form data while other changes affect the processing done by the system after a form has been entered.

Procedures and/or processes are affected on the following forms when using Requisition Administration.

- Set Up A New Employee form (NH-SCR)
- Employee Information form (EF-SCR)
- Incumbency - Basic Details form (M40SCR)
- Applicant Transfer form (ET-SCR)
- Requisition Candidate - Basic Details form (R11SCR)
- Requisition - Basic Details form (R10SCR)

Tasks

The following tasks are affected when using Requisition Administration:

- Hiring an external candidate using the Set Up a New Employee form (NH-SCR)
- Putting an internal candidate into a new position using the Incumbency - Basic Details form (M40SCR)
- Transferring applicants to active employee Organizations using the Applicant Transfer form (ET-SCR)

Prerequisites

Before performing the tasks in this section, ensure that Requisition Administration implementation task has been completed.

☞ *Please refer to* **Implementing Requisition Administration** *(on page 29) for details about the implementation task.*

Question answered

The following question is answered in this section:

What are the differences in form procedures and processes when using Requisition Administration?

Differences in form processing when using Requisition Administration

Some standard forms are processed differently when you are using Requisition Administration. The changes in processing include:

- Assignment of the employee to a Position when processing a new hire or applicant transfer
- Creation of a Requisition Candidate record when a Job or Position Applied For is recorded in Applicant Administration

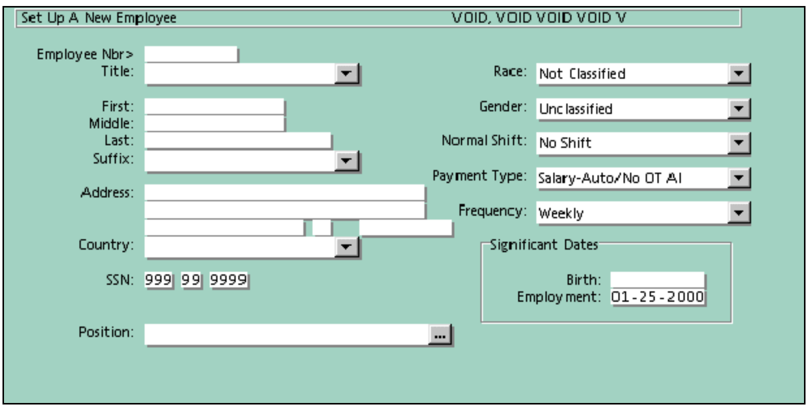
The forms affected by these processing changes are as follows:

- Set Up A New Employee form (NH-SCR)
- Incumbency - Basic Details form (M40SCR)
- Applicant Transfer form (ET-SCR)
- Requisition Candidate - Basic Details form (R11SCR)
- Requisition - Basic Details form (R10SCR)

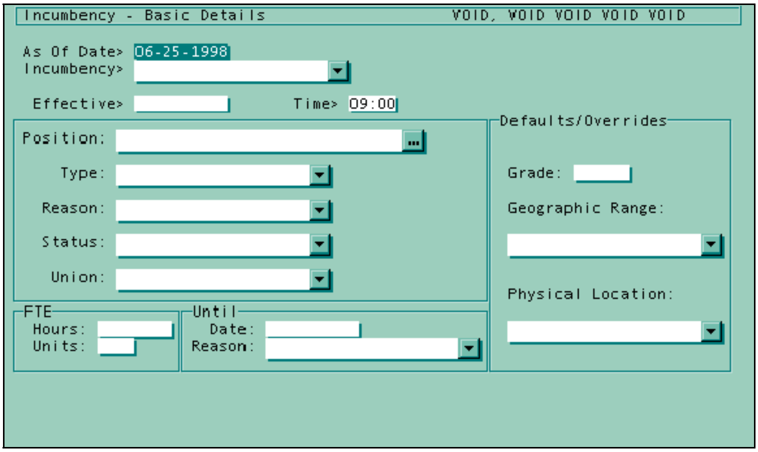
The processing changes for each of these forms are explained in detail in the following topic.

Set Up A New Employee form and Employee Information form

To hire an external candidate, use the Set Up A New Employee form (NH-SCR).



To put an internal candidate into a new position, use the Incumbency - Basic Details form (M40SCR).



If Position Administration is not in use, but Requisition Administration is, each of these forms has an extra text box included to enter the Requisition ID. After the form is processed, a modified Requisition Candidate - Basic Details record (R11SCR) is automatically created using the employment date and a status of Selected/Employed.

If Position Administration is in use, a Position text box has been added to let you select the primary incumbency Position to assign to the new employee. A second form panel is provided to record the Requisition ID entry. After the form is processed, a modified Requisition Candidate - Basic Details record (R11SCR) is automatically created. Text boxes are also provided on the second panel to record the incumbency status, employee activity status, and the complement amount for the Position (if Complement Control is in use). In this case, the Incumbency - Basic Details form (M40SCR) is automatically created or updated with the incumbency information using the employment date.

See also:

- Hiring an external candidate using the Set Up a New Employee form ***(on page 114)***

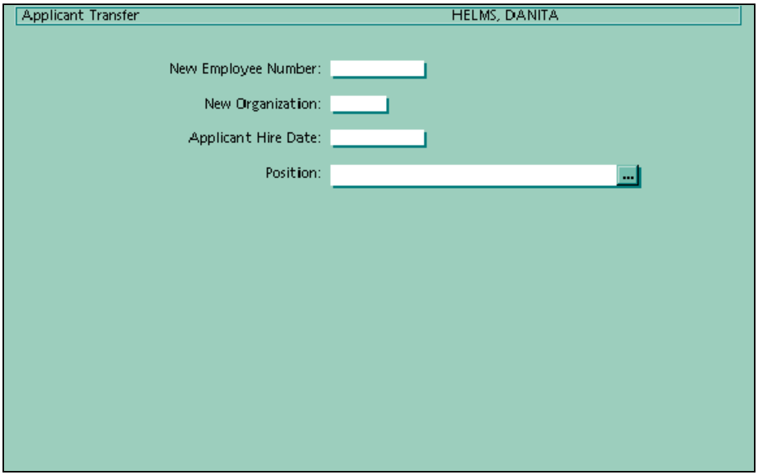
For detailed directions on hiring external candidates when using Requisition Administration.

- Putting an Internal Candidate into a New Position Using the Incumbency - Basic Details form ***(on page 121)***

For detailed directions on hiring internal candidates when using Requisition Administration.

Applicant Transfer form

To transfer applicants to active employee Organizations, use the Applicant Transfer form (ET-SCR).



If Position Administration is not in use, but Requisition Administration is, an extra text box is included on the form to enter the Requisition ID. However, the Requisition Candidate must be created first. No other forms are created or updated.

If Position Administration is in use, a Position text box has been added to let you select the primary incumbency Position to assign to the new employee. A second form panel is provided to record the incumbency status, employee activity status, and the complement amount for the Position (if Complement Control is in use).

The Incumbency - Basic Details form (M40SCR) is automatically created or updated with the incumbency information.

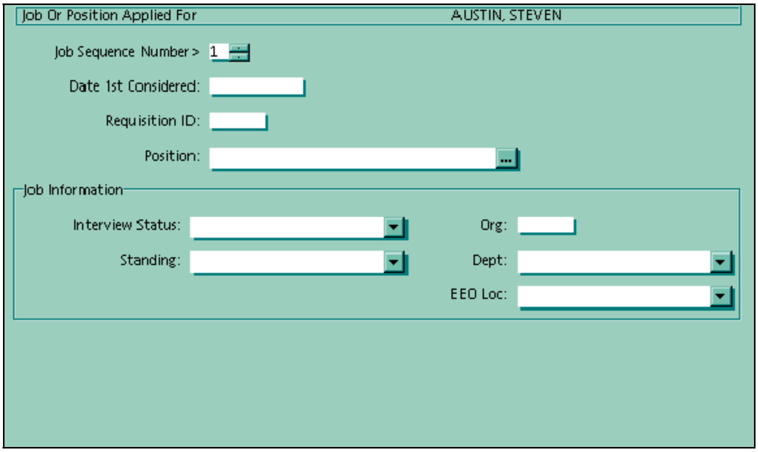
See also:

- Transferring applicants to active employee Organizations using the Applicant Transfer form ***(on page 123)***

For detailed directions on transferring applicants when using Requisition Administration.

Job Or Position Applied For form

The Job Or Position Applied For form (003SCR), from Applicant Administration, has been changed and can now be used with all your Organizations, not just your applicant companies. This means that the form can now be used for applicants as well as your internal candidates who are not in an applicant Organization.



The Requisition ID text box has been reduced from eight positions to six to better interface with Requisition Administration.

After a Job Or Position Applied For form (003SCR) is processed, a Requisition Candidate - Basic Details form (R11SCR) is automatically created for the Requisition ID with a Status of Candidate. The Job Or Position Applied For form (003SCR) can continue to be changed (for example, a new date) during the candidacy and will continue to update the Requisition Candidate - Basic Details form (R11SCR) data. However, once another Requisition Candidate - Basic Details form (R11SCR) entry is made (for instance, a status of Not Selected), no further changes are allowed on the Job Or Position Applied For form (003SCR). All future changes must be made on the Requisition Candidate - Basic Details form (R11SCR).

Apply the Concept

True or False. Explain any false answers.

a) The Employee Information form (EF-SCR) and the Set Up A New Employee form (NH-SCR) display a second panel for entry of Requisition Administration data if both Position Administration and Requisition Administration are in use.

b) If the second panel of the Employee Information form (EF-SCR) is processed, there is no effect on the Requisition Candidate - Basic Details form (R11SCR).

c) If Position Administration is in use, an applicant transfer will reject if the employee has any current or future-dated Positions assigned.

d) The Job Or Position Applied For form (003SCR), from Applicant Administration, cannot be used with all your Organizations, only your applicant companies.

e) The Job Or Position Applied For form (003SCR) can continue to be changed during the candidacy and will continue to update the Requisition Candidate - Basic Details form (R11SCR) data. Once another Requisition Candidate - Basic Details form (R11SCR) entry is made, no further changes are allowed on the Job Or Position Applied For form (003SCR).

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section. The instructions assume that both Position Administration and the Requisition Administration are in use.

These instructions assume that, in the previous section practice, Requisition ID '000005' for three Senior Bird Keepers was created and authorized. They further require that three Requisition Candidate records be created for those vacancies using the Requisition Candidate - Basic Details form (R11SCR), and that those candidate records be subsequently modified to show that the candidates are Selected/Not Empl'd. The three candidates are as follows:

- Elizabeth Jones (external candidate)
- Todd Byers (existing employee 6001)
- Applicant number 'A003' in Organization '993333'

Tasks

Hiring an external candidate using the Set Up a New Employee form

To hire an external candidate, you use the Set Up a New Employee form (NH-SCR).

Note: *If Position Administration is in use, a Position list box is displayed on the Set Up a New Employee form (NH-SCR), and a second panel is displayed—where you enter Incumbency Details Status and Requisition ID. If Position Administration is not in use, the Requisition ID entry is recorded on the first form panel and no second panel is displayed.*

1. Access the Set Up a New Employee form (NH-SCR)

Access this form by making the following selections from the Navigator:

Component:	Employee Resourcing
Process:	Hire, Rehire, Reinstate an Employee
Task:	Quick Hire

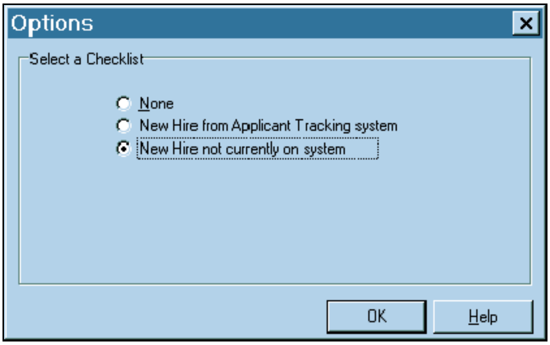
The Employee Selection dialog box is displayed.

For practice, make the Navigator selections to access the Set Up a New Employee form (NH-SCR).

2. Select a Checklist (for Solution Series 4.x users only)

Select the appropriate New Hire checklist.

For practice, select the 'New Hire not currently on system' option.



For practice, enter 'LMODEL 00'.

3. Click OK or press Enter (for Solution Series 4.x users only)

Click OK or press Enter to process the entry.

For practice, click OK or press Enter.

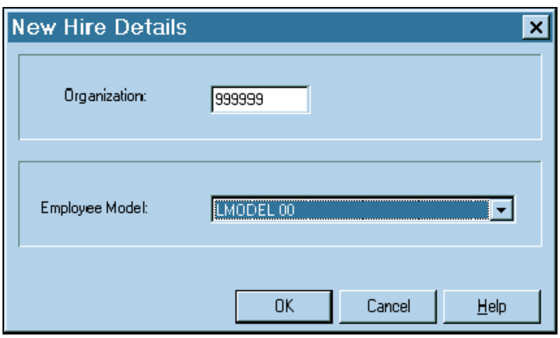
4. Enter Organization number and Employee Model number

Enter the number of the Organization that is hiring this new employee.

Select an Employee Model number.

For practice, enter '999999' using employee 'LMODEL 00'.

If you completed the Guided Practice, the resulting dialog box should look similar to the example that follows:



5. Click OK or press Enter

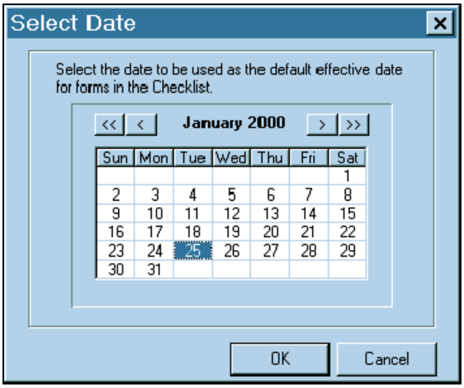
Click OK or press Enter to process the entry.

For practice, click OK or press Enter.

6. Select Date (for Solution Series 4.x users only)

Select the date to use as the default effective date for forms in the Checklist.

For practice, accept the current date.



7. Click OK or press Enter (for Solution Series 4.x users only)

Click OK or press Enter to process the entry.

For practice, click OK or press Enter.

8. Enter an Employee Number

Enter the employee number you would like to assign to this new employee.

For practice, enter 'A020'.

9. Enter Title

Select one of the titles from option list HR35.

For practice, enter 'Miss'.

10. Enter the First name

Enter the first name of the new employee.

For practice, type 'Elizabeth'.

11. Enter Middle name

Type the middle name, if any, of the new employee.

For practice, enter 'Ann'.

12. Enter Last name

Enter the new employee's last name.

For practice, enter 'Jones'.

13. Enter Suffix

Select the name suffix, if any, from option list HR37.

For practice, select '(None)'.

14. Enter Address

Enter the first line of the new employee's address. The second line is reserved for additional address information, such as an apartment number.

The third line consists of 3 text boxes for the city, state and zip code.

For practice, enter '1234 Main Street'.

Leave the second address line blank.

15. Enter the city name

On the third address line in the first text box, enter the city.

For practice, type 'Chicago'.

16. Enter the state code

In the second text box of the third address line, enter the two position state code.

For practice, type 'IL'.

17. Enter the zip code

In the third text box of the third address line, enter the zip code.

For practice, enter '60606'.

18. Select the Country

Select the country in which the employee lives.

For practice, select 'United States'.

19. Enter the Social Security

Enter the new employee's nine-digit social security number.

For practice, enter '123 45 8888'.

20. Enter the Requisition ID (if Position Administration is not in use)

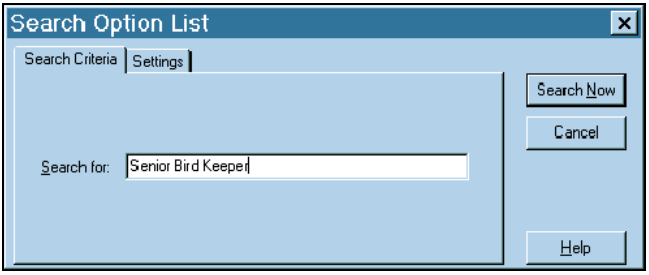
Type the associated Requisition ID in the Requisition ID text box.

For practice, this text box will not appear.

21. Click the Position box (if Position Administration is in use)

To specify the position that the new employee is going to fill, click the Position box to display the Search Option List.

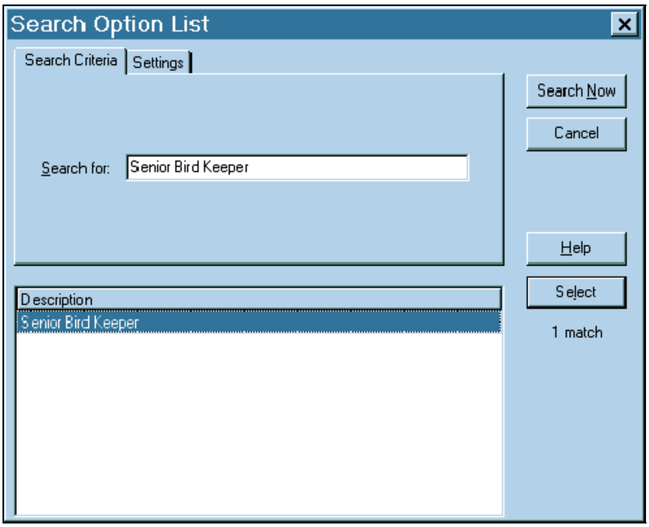
For practice, click the Position box.



22. Enter the Position name in the Search for text box and click Search Now (Position Administration only)

The search is initiated and a list of results is displayed.

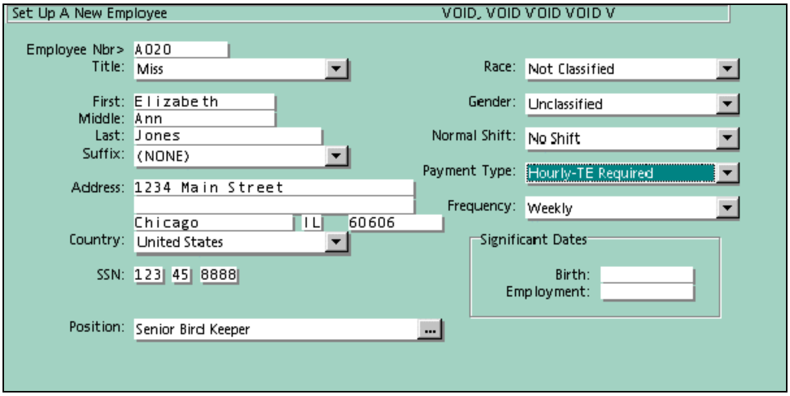
For practice, enter 'Senior Bird Keeper' and click Search Now.



23. Click Select (Position Administration only)

You are returned to the Set Up a New Employee form (NH-SCR) and the Position box is now filled in.

If you completed the Guided Practice, the resulting form should look similar to the example that follows (Position Administration is in use):



24. Select the Race

Select the employee's race from option list HR22. This option list should include all of the race source types your organization may need.

For practice, select 'Asian/Pacific Island'.

25. Select the Gender

Select the gender designation for the new employee from option list PP41.

For practice, select 'Female'.

26. Select the Normal Shift

Select the employee's normal shift from option list PP43. This option list should include all of the normal shift types your organization may need.

For practice, select 'No Shift'.

27. Select the Payment Type

Select whether the new employee is to be paid automatically or through time document entry. This option list should include all of the payment types your organization may need.

For practice, select 'Salary-Auto Paid'.

28. Select the Frequency

Select the new employee's pay frequency from option list PP29. This option list should include all of the pay frequencies your organization may use.

For practice, select 'Semi Monthly'.

29. Enter the Birth Date

Enter the employee's date of birth. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

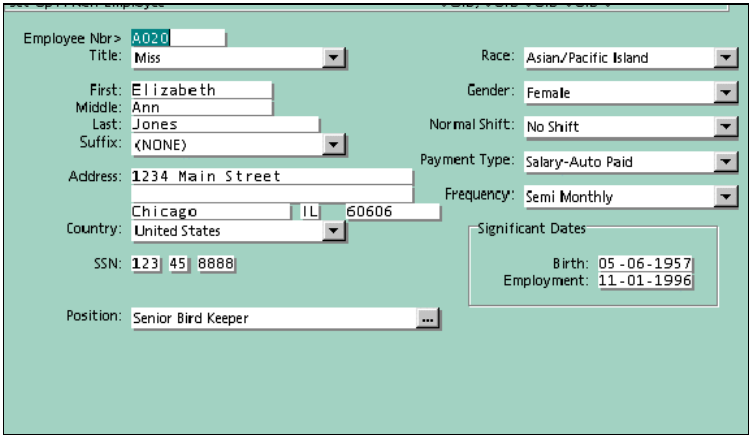
For practice, type '05-06-1957' (US and Canada) or '06-05-1957' (elsewhere).

30. Enter the Employment Date

Enter the date employment becomes effective. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

For practice, type '11-01-1996' (US and Canada) or '01-11-1996' (elsewhere).

If you completed the Guided Practice, the resulting form should look similar to the example that follows (Position Administration is in use).



31. Click Save or press Enter

The second form panel for the Set Up a New Employee form (NH-SCR) is displayed.

For practice, click Save.

32. Select the Status

Select an Incumbency Status from option list PM17, usually Regular or Acting. This option list should be edited to include all the incumbency statuses your organization may need.

For practice, select 'Regular'.

33. Select an Activity status

Select an Activity status from option list HR72. This option list should be edited to include all the Activity statuses your organization may need.

For practice, select 'New Hire-Sal Reg FT'.

34. Select Union

Select the union option from option list PP429. This option list should include all of the union option types your organization may need.

For practice, leave this blank.

35. Enter a Complement Control Amount

Enter the Amount to be added to the Position complement for the complement unit displayed above this box.

For practice, enter '1'.

Note: *If the Complement Unit is Headcount, the system automatically assumes the entry is '1'. There is no need to enter it.*

36. Click the Previous Panel button or press Enter

If multiple selected candidates exist for the Requisition, an Employee Information - Selected Candidates panel is displayed. Select the associated candidate by clicking on the button to the left of the name.

An error message is displayed if one of the following conditions is present:

- No candidates with the status of Selected/Not Empl'd are found for the Requisition.
- The Requisition has a Closed status.
- The Requisition cannot be found.

If no errors occur, the form is processed with the following results:

- The new employee is added to the database.
- A modified Requisition Candidate - Basic Details record (R11SCR) is created using the employment date and a status of Selected/Employed.
- The Requisition record is Closed if the units are filled.
- If Position Administration is in use, an Incumbency - Basic Details form (M40SCR) is created, using the employment date and a time of 09:00 am.

For practice, click the Previous Panel button or press Enter.

See also:

- Differences in form processing when using Requisition Administration ***(on page 109)***

For details on hiring external candidates when using Requisition Administration.

Putting an Internal Candidate into a New Position Using the Incumbency - Basic Details form

To put an internal candidate into a new position, you use the Incumbency - Basic Details form (M40SCR), and follow these steps.

Note: *This task is designed to be completed only when Position Administration is in use.*

1. Access the Incumbency - Basic Details form (M40SCR)

Access this form by making the following selections from the Navigator:

Component: Employee Resourcing
Process: Hire, Rehire, Reinstate an Employee
Task: Assign Position

For practice, access the Incumbency - Basic Details form (M40SCR) for employee 6001, Todd Byers.

2. Enter the As of Date

In the As of Date text box, enter the date of that this entry is being made. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

For practice, accept the default of today's date.

3. Enter the Incumbency

Select the Incumbency number from the Incumbency list box.

For practice, select '1st Incumbency'.

4. Enter the Effective date

In the Effective date text box, enter the date this employee will begin employment at this new position. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

For practice, enter '11-05-1996' (US and Canada) or '05-11-1996' (elsewhere).

5. Select the Position

In the Position box, select the position that this employee is being assigned to.

For practice, select 'Senior Bird Keeper'.

6. Select the Type

In the Type list box, specify the employee's incumbency relevant to this position.

For practice, select 'Primary Incumbency'.

7. Select the Reason

In the Reason list box, select the reason that this employee is changing positions.

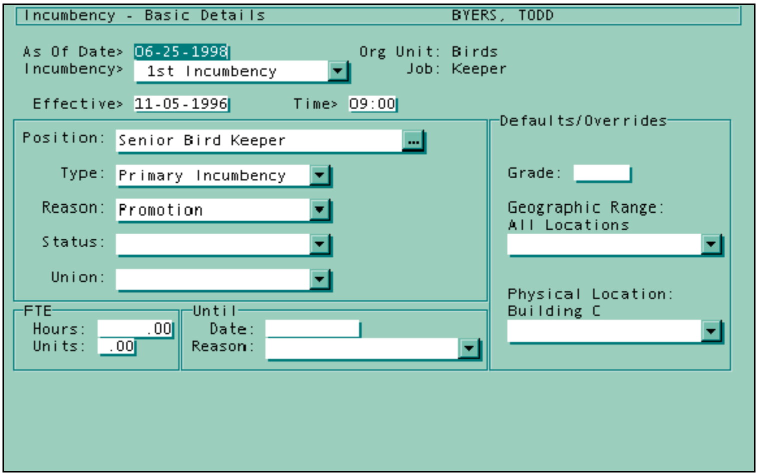
For practice, select 'Promotion'.

8. Click Save or press Enter

The Org Unit and Job information automatically appears, and other information appears in the Defaults/Overrides group box.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Differences in form processing when using Requisition Administration ***(on page 109)***

For details on hiring external candidates when using Requisition Administration

Transferring applicants to active employee Organizations using the Applicant Transfer form

To create a new employee record from existing information in the Applicant Administration application, use the Applicant Transfer form (ET-SCR) and follow these steps.

Note: *If Position Administration is in use, a Position list box is displayed on the Applicant Transfer form (ET-SCR), and a second panel is displayed—where you enter Incumbency Details Status and Requisition ID. If Position Administration is not in use, the Requisition ID entry is recorded on the first form panel and no second panel is displayed.*

1. Access the Applicant Transfer form (ET-SCR)

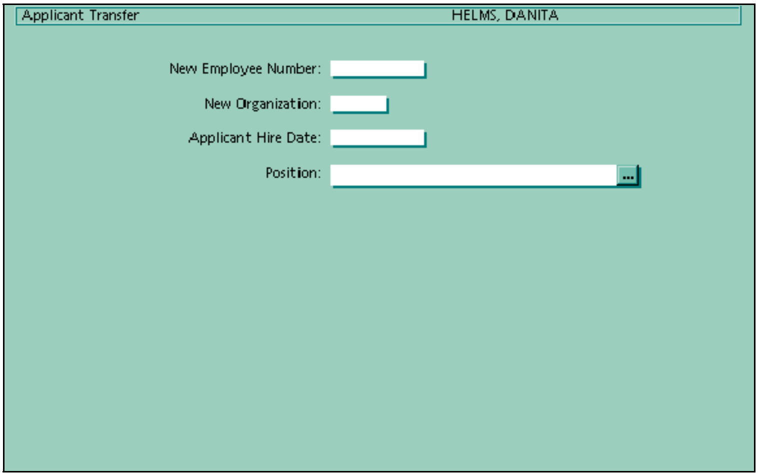
Access this form by making the following selections from the Navigator:

Component: Employee Resourcing
Process: Hire, Rehire, Reinstate an Employee
Task: Transfer Emp to New Organization

The Applicant Transfer form (ET-SCR) is displayed.

For practice, access the Applicant Transfer form (ET-SCR) for employee A003, Danita Helms, in Organization '993333'.

If you completed the Guided Practice, the resulting form should look similar to the example that follows (Position Administration is in use):



2. **Assign a valid employee number**

Type a unique alphanumeric employee number, up to 10 characters in length, in the New Employee Number text box.

For practice, type 'A003'

3. **Enter a Organization**

Type the Organization of the organization into which the candidate is to be hired.

For practice, type '999999'.

4. **Enter an Applicant Hire Date**

Type an entry into the Applicant Hire Date text box. Dates are entered in MM-DD-CCYY or CCYYMMDD format (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

For practice, enter '11-06-1996' (US and Canada) or '06-11-1996' (elsewhere).

5. **Enter Requisition ID (if Position Administration is not in use)**

Type the associated Requisition ID in the Requisition ID text box.

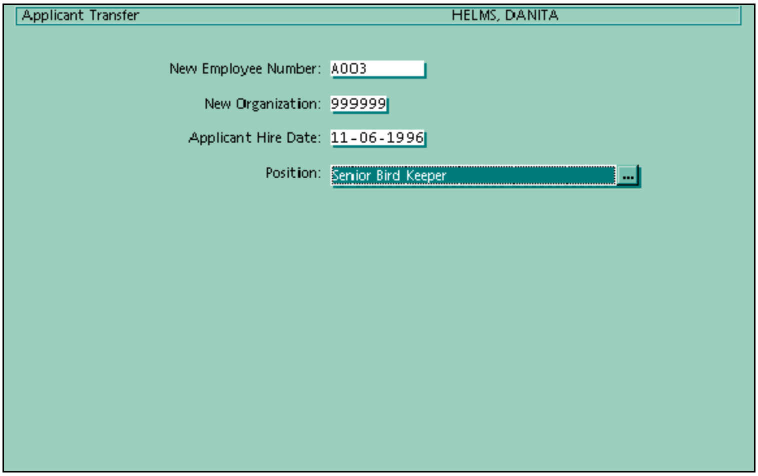
For practice, this text box will not appear.

6. **Select a Position (if Position Administration is in use)**

Select the appropriate position from the Position box.

For practice, select 'Senior Bird Keeper'.

If you completed the Guided Practice, the resulting form should look similar to the example that follows (Position Administration is in use):



7. Click Save or press Enter

If Position Administration is in use, the second form panel is displayed for entry of Requisition Administration information.

For practice, click Save or press Enter.

8. Enter the Incumbency Details Status (optional) (Position Administration only)

If you are using Position Administration, select an option from the Status list box.

For practice, leave this text box blank.

9. Enter the Employee Details Activity (Position Administration only)

Select an option from the Employee Details Activity list box.

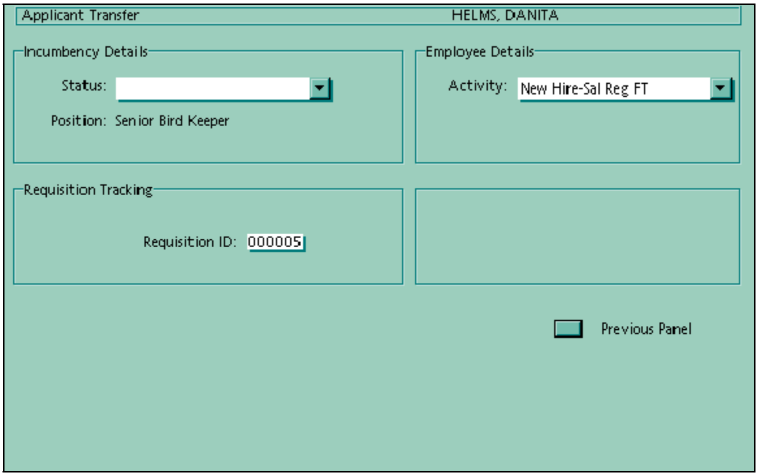
For practice, select 'New Hire-Sal Req FT'.

10. Enter the Requisition ID (Position Administration only)

Type the associated Requisition ID in the Requisition ID text box.

For practice, type '000005'.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



11. Click Save or press Enter

For practice, click Save or press Enter.

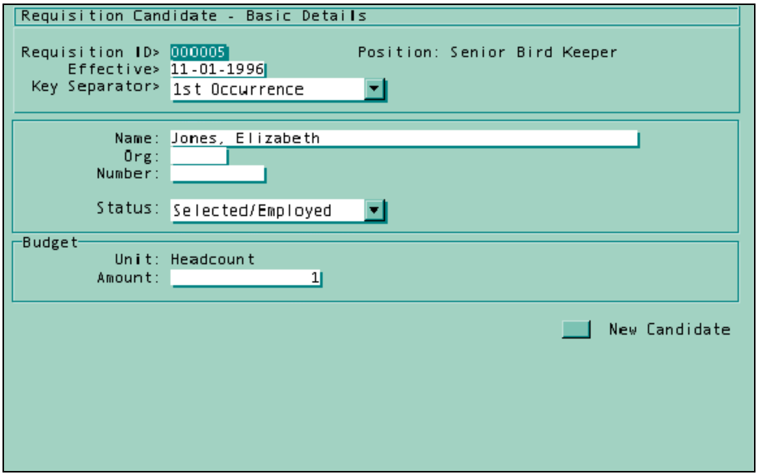
An error message is displayed if either of the following conditions is present:

- No candidates with the status of Selected/Not Empl'd are found for the Requisition.
- The Requisition has a Closed status.

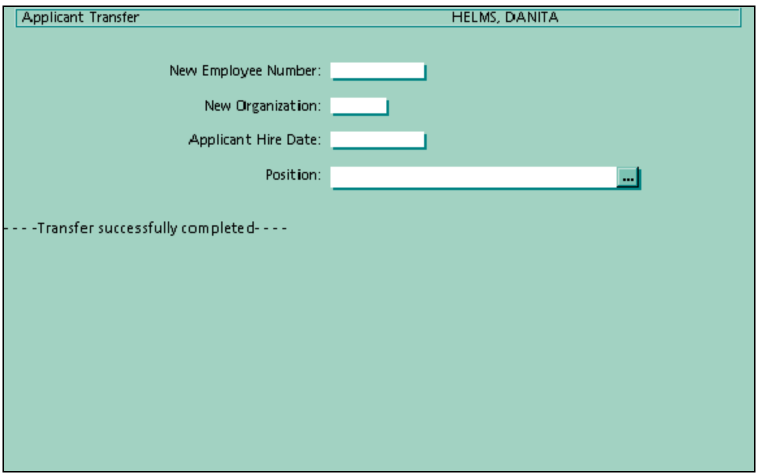
If no errors occur, the form is processed with the following results:

- The applicant is transferred.
- An amended Requisition Candidate record is created using the employment date and a status of Selected/Employed.
- The Requisition record is Closed if the units are filled.
- If Position Administration is in use, an Incumbency - Basic Details form (M40SCR) is created, using the employment date and a time of 09:00 am.

As each employee is hired, the status of the employee's Requisition Candidate Record is automatically changed to Selected/Employed on the Requisition Candidate - Basic Details form (R11SCR).

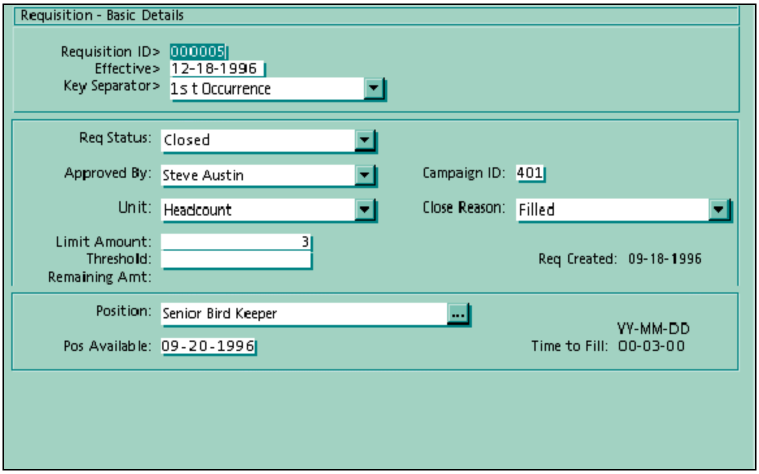


If you are transferring applicants to active employee Organizations using the Applicant Transfer form (ET-SCR), you receive the message 'transfer successfully completed' on the Applicant Transfer form (ET-SCR).



After the limit of the Requisition has been reached, the following changes are automatically made to that requisition's Requisition - Basic Details form (R10SCR):

- Req Status is changed to Closed
- Close Reason is changed to Filled
- Time to Fill is calculated and displayed



See also:

- Differences in form processing when using Requisition Administration ***(on page 109)***

For details on hiring external candidates when using Requisition Administration.

Extended Practice

1. Hire the external Selected Candidates for the Trainee Bird Keeper Position by using the Set Up a New Employee form (NH-SCR).

2. Hire the internal Selected Candidate for the Trainee Bird Keeper Position by using the Incumbency - Basic Details form (M40SCR).

3. View the resulting Requisition Candidate - Basic Details form (R11SCR) for each candidate. What is the status for each candidate?

4. View the resulting Requisition - Basic Details form (R10SCR). What is the Requisition status?

Review of Questions Answered

What are the differences in form procedures and processes when using Requisition Administration?

PART 4

Appendices

In This Section

APPENDIX A

Report Quick Reference

In This Appendix

Introduction

This section provides a quick reference guide to Requisition Administration reports covered in this manual. Sample output for the report is included.

Requisition Details by Position/Organization Unit (M04RPT)

Business Task

The Requisition Details by Position/Organization Unit (M04RPT) report details existing requisitions. It is an alternative to viewing existing requisitions online.

Report Field Details

- **Organization Unit**—The Org Unit for which the requisition has been created.
- **Position**—The ID and title of the position for which the requisition was created.
- **Effective**—The date when the requisition was activated.
- **Status**—The status value used to designate the various stages of activity of the Requisition. A new Requisition may only have a status of 'Open-Not Authorized'. A Requisition's status can be changed manually or will change When certain processes are carried out.
- **Approved By**—The name or job title of managers authorized to approve Requisitions.
- **Unit**—The value of a Requisition expressed as an FTE, hours, salary, or headcount.
- **Limit Amount**—The total value of the Requisition expressed as FTE, hours, salary, or headcount.
- **Remaining Amount**—A system-calculated unit value that indicates how many vacancy units are left on the Requisition.

Report Sort Order

The report is sorted in the following order:

Organization Unit
Position ID
Requisition ID

Parameter Options and Setup

- **Position**—Select a position you want to report on.
- **Requisition Status**—Leave blank for open statuses only, enter 'A' for all statuses within the last 12 months.

See also:

- Viewing Requisitions on hard copy ***(on page 63)***

To learn how to use the Requisition Details by Position/Org report to display a list of requisitions.

Requisition Details by Position/Organization Unit (M04RPT) - Example

```
                                         Requisition Details by Position/Org                  FILE VERSION00 PAGE        1
                                                AS OF 09-23-96                                TIME 09:20     DATE 09-23-96

-----------Organization Unit--------------------
             ----------Position-----------------
                             --------------------------------------------Requisition--------------------------------------
                              ID    Effective  Status              Approved By        Unit        Limit    Remaining Time
                                                                                      Amount      Amount   To Fill

000001 The Zoo

            POS001         Senior Bird Keeper
                            000001 01-01-1996 Open-Not Authorized  Not authorized     FTE          5.55     5.55
                            000002 01-01-1996 Open-Not Authorized  Not authorized     Headcount  10.00    10.00

            POS002         Trainee Bird Keeper
                            000004 01-01-1996 Open-Not Authorized  Not authorized     FTE          6.00     6.00

000002 Animal Management

            POS003         Trainee Reptile Keeper
                            000005 01-01-1996 Open-Not Authorized  Not authorized     FTE         11.00    11.00
```

APPENDIX B

Practice and Review Answers

In This Appendix

Introduction

This appendix provides answers for the Apply the Concepts practices, as well as the Extended Practice and Review of Questions Answered that are included at the end of each instructional chapter.

Overview of Requisition Administration

Review of Questions Answered

1. Define Requisition Administration.

   Easy-to-use system for tracking the hires and transfers that can take place to fill vacancies. This application can keep a record of Requisition information and track the progress of a Requisition.

2. Match Requisition Administration feature to its corresponding description:

Feature	Answers	Description
1. Customizable level of control	b	a) Integration with the hiring and transfer processes to update relevant Requisition Administration records.
2. Flexibility in how vacancies are represented	c	b) Controlled by selecting the type of validation message, Warning or Reject.
3. Integration with other Solution Series processes	a	c) Vacancies are measured in four different ways (Headcount, FTE, Hours, Salary).
4. Maintenance of historical data	e	d) The system security feature.
5. Integrated system security	d	e) History is maintained to perform data analysis as of a particular date.

3. Identify and explain how Human Resources Administration interacts with Requisition Administration.

   The Applicant Administration application interacts with Requisition Administration. The Job Or Position Applied For form (003SCR) in the Applicant Administration application automatically creates a corresponding candidate record in Requisition Administration.

Understanding Requisitions and Requistion Candidates

Apply the Concept

1. Explain how Requisitions and Requisition Candidates could relate to each other in your organization.

   Your answer is specific to your organization.

   Cyborg Answer: A Requisition is a formal request to fill vacancies. Each candidate for a vacancy in a Requisition is assigned to the Requisition as a Requisition Candidate.

2. The value of a Requisition expressed as an FTE, Hours, Salary, or Headcount is called the Requisition unit.

3. What is the total value of a Requisition called?

   Requisition limit.

4. What must be the same throughout the life of the Requisition and for Requisition Candidates?

   Requisition unit

5. How is the Threshold Amount feature used?

   The Threshold Amount allows you to prevent a Requisition from remaining Open when the vacancies have been filled before reaching the Requisition's Limit Amount. The Threshold Amount should therefore be the unit value (less than the Limit Amount) that must be met in order for the Requisition to be considered filled. The Total Amount needs to be equal to or greater than the Threshold Amount to close the Requisition automatically. The Requisition's status changes to Pending Closure or Closed once its Total Amount is equal to or greater than its Threshold Amount.

Review of Questions Answered

1. What are Requisitions and Requisition Candidates and how do they relate to each other?

   A Requisition is a formal request to fill a vacancy or vacancies. A Requisition Candidate is a candidate for a vacancy represented on a Requisition. Each candidate for a vacancy on a Requisition is assigned to the Requisition as a Requisition Candidate.

2. How are Requisition vacancies measured?

   Each Requisition can measure vacancies in one of the following ways:

   - *By FTE (Full Time Equivalent)*
   - *By Headcount*

- *By Hours*
- *By Salary*

Vacancies are represented on a Requisition by selecting one of these units and entering a Limit Amount. For example, a formal request to fill four full-time vacancies could be represented by selecting a unit of Headcount and entering a Limit Amount of 4.

The same unit must be used throughout the life of the Requisition and for Requisition Candidates. Although different units can be used for different Requisitions, you may find it helpful to use one unit consistently or to have clear guidelines as to which units are used for which types of Requisitions.

3. What are a Requisition's Remaining Amount and Threshold Amount?

   As each candidate is selected, the status of the corresponding Requisition Candidate record is manually changed to Selected/Not Empl'd. When this happens, the system calculates how many vacancy units are left on the Requisition, displaying the figure as the Requisition's Remaining Amount. As vacancies are filled, the Remaining Amount decreases until, finally, no more Units are available and no further hires or transfers can take place.

   Regardless of the unit you have selected to measure the vacancies on a Requisition, you can set a Threshold Amount for the Requisition in addition to a Limit Amount. By doing this, you can prevent a Requisition from remaining Open when the vacancies have been filled before reaching the Requisition's Limit Amount. This could happen, for example, when a Requisition's Remaining Amount is less than the minimum salary that would be offered for a vacancy.

   The Threshold Amount should, therefore, be the unit value (less than the Limit Amount) that must be met in order for the Requisition to be considered filled. The Total Amount needs to be equal to or greater than the Threshold Amount to close the Requisition automatically. The Requisition's status changes to Pending Closure or Closed once its Total Amount is equal to or greater than its Threshold Amount.

   For example, the salary Threshold Amount could be 45,000 with a 55,000 Limit Amount for a Requisition. Filling the Requisition for 46,000 would exceed the Threshold Amount, causing a Requisition status change. Instead of remaining Open, the Requisition status would then change to reflect that the Requisition was Closed because it met the condition of the Threshold Amount.

Implementing Requisition Administration

Apply the Concept

1. Consider your current Requisition process. Describe the tasks and decisions your organization would make to implement Requisition Administration.

   Your answer is specific to your organization.

   Cyborg Answer:

   - Setting the Requisition Administration System Options using the Systems Options form (TG-SCR)

   - Editing the Requisition Administration option lists (optional)

   - Choosing the type of validation messages you will need

   - Determining how shared settings affect the way in which you implement Requisition Administration

   - Deciding if additional security is needed

2. Multiple choice. Circle the appropriate choice.

a) Requisition Administration validates whether the vacancy limit on a corresponding Requisition will be exceeded for:
   i) processing new hires
   ii) assigning an employee to a new Position
   iii) transferring an applicant to a live Organization
   iv) <u>all of the above</u>
   v) i & ii only

b) In shared settings:
   i) you will need to access the System Options form (TG-SCR) for each Organization in the group
   ii) <u>all Organizations share the same System Options Control Number</u>
   iii) all of the above
   iv) none of the above

3. Identify the option lists that can be edited within Requisition Administration. Give an example of how each option list might be modified to meet your organization's requirements.

   Approved By—This option list could be modified to include the names or job titles of those authorized to approve Requisitions.

   Reason for Closure—This option list could be modified to include other reasons for closing a Requisition.

4. Identify the option lists whose values Cyborg recommends not be modified. Give an example of when you could delete a value in one of these option lists.

Requisition Status option list (RT01)

Requisition Unit option list (RT04)

Requisition Candidate Status option list (RT05)

You could delete a value from the Requisition Unit option list (RT04) if, for example, the organization does not want Requisitions to be filled by Salary units.

5. Multiple choice. Circle the appropriate choice.

All Requisition Administration delivered option lists
- i) do not reflect an organization's requirements
- ii) will always have an effect on validation
- **iii)** can be added to, changed, or deleted
- iv) all of the above

All Requisition Administration option lists can be added to, changed, or deleted. However, adding values to the reserved Cyborg option lists will have no effect on validation. Only the delivered codes affect validation.

Review of Questions Answered

1. What Requisition Administration considerations should you take into account when deciding on an implementation strategy?

   Before setting up Requisition Administration, you need to choose your implementation strategy . You must consider:

   — *What type of validation messages you want.*

   — *How shared settings affect the way you implement Requisition Administration.*

2. Which Requisition Administration option lists contain options that should never be changed?

   — *Requisition Status (RT01)*

   — *Requisition Unit (RT04)*

   — *Requisition Candidate Status (RT05)*

3. What extra security might be needed for Requisition Administration?

   You may want to consider adding additional security to the Requisition - Basic Details form (R10SCR) so that only certain personnel are able to use it to create Requisitions. By doing this you can ensure that Requisitions are not set up incorrectly or in error.

Creating and Maintaining Requistions

Apply the Concept

1. True or False. Explain any false answers.

a) A Requisition can represent one or more vacancies.

True.

b) You can change the unit of measure and Limit Amount once a Requisition has a candidate assigned to it.

False. You cannot change the unit of measure and Limit Amount once the Requisition has a candidate assigned to it. If more vacancies need to be added, a new Requisition must be created.

2. Consider your current Requisition approval process. How would you use Requisition Administration to support this process?

   Your answer is specific to your organization.

   Cyborg Answer: Populate the Approved By option list (RT03) using the Option list Edit Utility form (CSUPDT). Select an option from the Approved By entry on the Requisition - Basic Details form (R10SCR). This entry can be edited at any time.

3. Describe how your organization might use the recruitment campaign feature.

   Your use of this feature is specific to your organization.

   Cyborg Answer: Requisitions can be associated with a particular Requisition Campaign, which is a three-digit alphanumeric field on the Requisition - Basic Details form (R10SCR).

4. True or False. If false, explain.

   A Requisition can be linked to a Position at any time.

   False, only if it is Open-Not Authorized.

5. True or False. Explain any false answers.

   a) When first created, a Requisition's status must be Open - Not Authorized.

   True.

   b) Candidates assigned to the Requisition with a status of Selected/Not Empl'd.

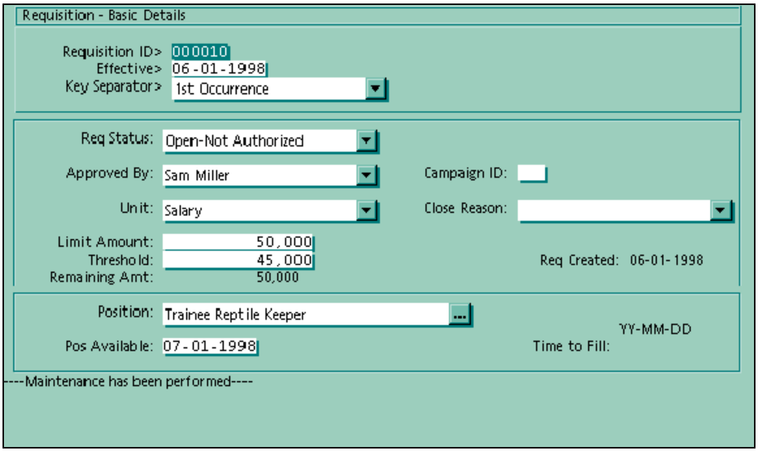
   False. This can only be done if there are no Selected/Not Empl'd candidates. If there are any Selected/Not Empl'd candidates and you still must close the Requisition, these *candidates must first be changed to Selected/Employed or Withdrawn before the Requisition can be closed manually.*

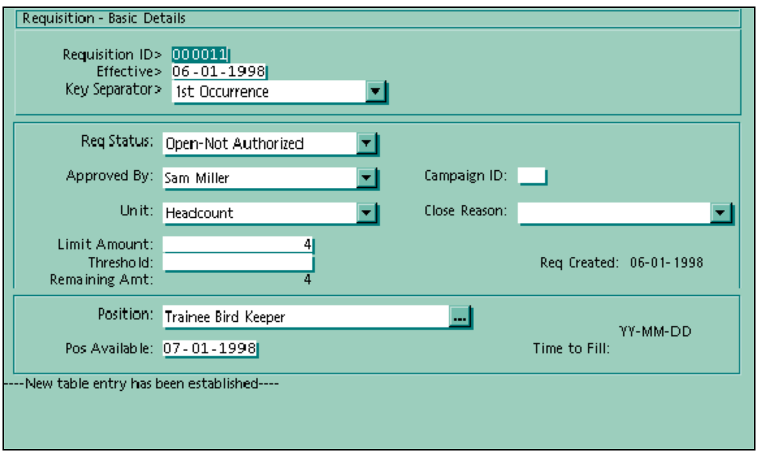
Extended Practice

1. Create two Requisitions.

   Facts: Effective today, you received two new Requisitions. The first Requisition is to fill one Trainee Reptile Keeper vacancy. The maximum salary for the Trainee Reptile Keeper Requisition is $50,000, with a Threshold of $45,000.

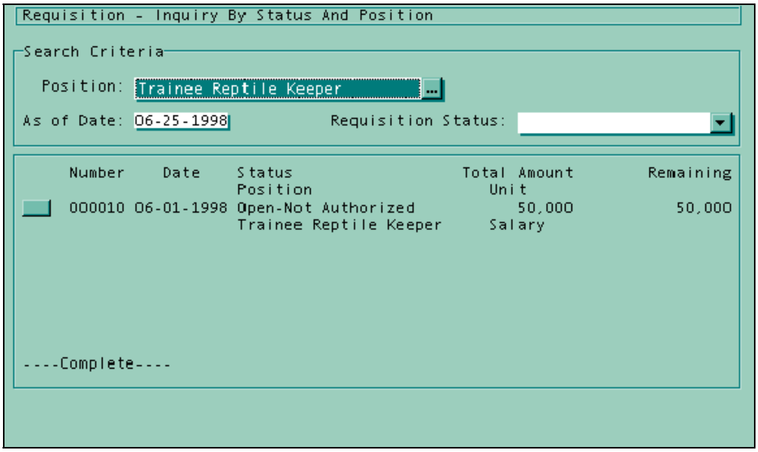
   The second Requisition is to fill four Trainee Bird Keeper vacancies.



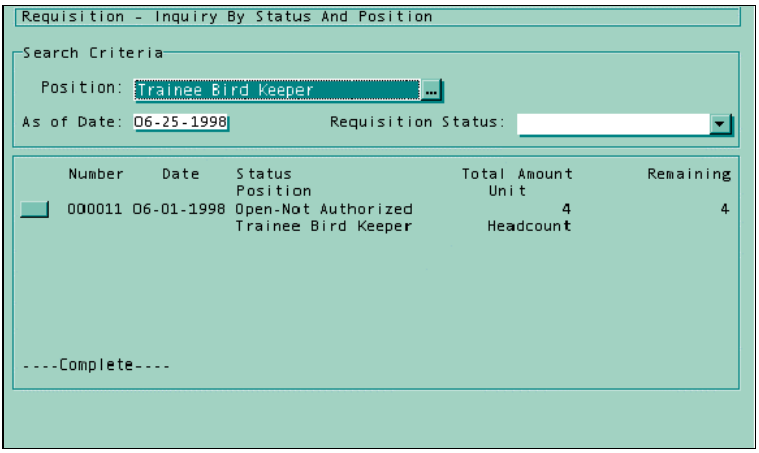


2. View the two newly created Requisitions.

a) View the Trainee Reptile Keeper Requisition using the Position and 'as of' date options. What displays on the form?



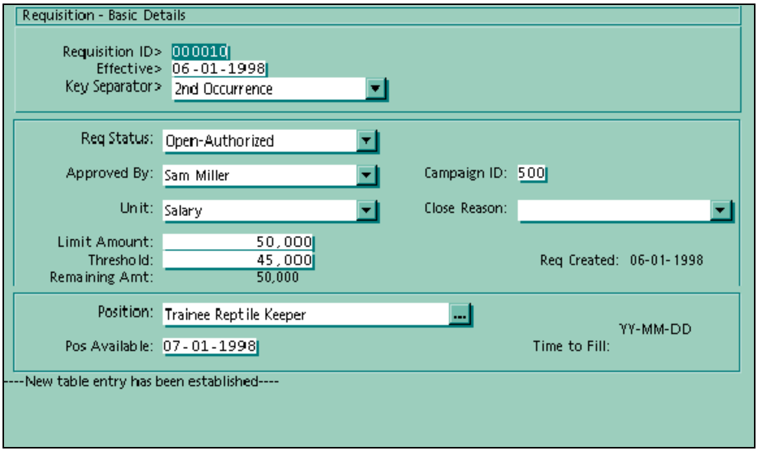
b) View the Trainee Bird Keeper Requisition using the Position and the Requisition Status option. What displays on the form?

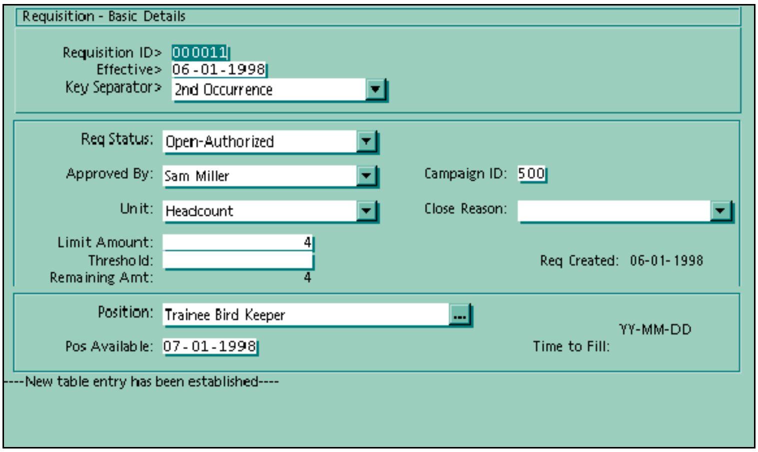


c) What would happen if a match could not be found?

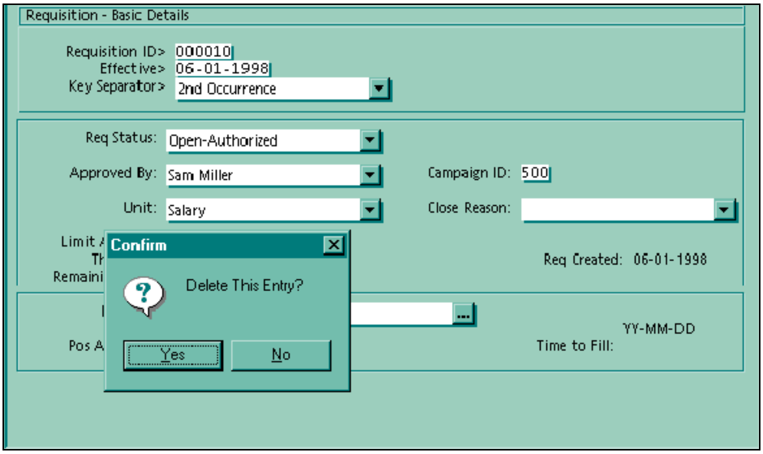
If no matching Requisition records are found, you will see a 'Complete' message at the bottom of the form.

3. Authorize both Requisitions and add the Campaign ID text box.





4. Delete the modified Requisition for the Trainee Reptile Keeper.



Review of Questions Answered

1. How and why can a Requisition status change?

   A Requisition's status when it is first created must be Open-Not Authorized.

   Pending Closure shows that the Limit Amount has been fulfilled, but that some of the Requisition Candidates still have a status of Selected/Not Empl'd. The Requisition's status changes to Closed only when all the Requisition Candidates filling the vacancies it represents have a status of Selected/Employed and there are no other Selected/Not Empl'd candidates.

   A Requisition's status can revert from Pending Closure back to Open - Authorized if a candidate who was Selected/Not Empl'd should withdraw.

   A Requisition's status cannot be changed to Closed if there are still Requisition Candidates assigned to the Requisition with a status of Selected/Not Empl'd.

   You can change the status manually or it can be changed automatically as a result of other processes.

2. What can you do to rectify a change made in error to a Requisition's basic details?

   If you change the Requisition status you will be prompted to also change either the Effective Date or the Key Separator for the Requisition. The original Effective Date of the first Requisition for this Requisition ID is stored and displayed on each succeeding Requisition occurrence.

   You may change the Position field only if the Requisition Status is Open - Not Authorized.

   To effect a recruitment freeze, change the Requisition Status to Closed - thus preventing candidates from being assigned against Requisitions. You can use the Close Reason *field to record the reason for the temporary closure of the Requisition, for example, Recruitment Freeze.*

Changes may be made to the Approved By, Pos Available, Campaign ID, and Close Reason fields as needed.

No changes are allowed to a Requisition whose Requisition status is Closed.

If a change to a Requisition's basic details has been made in error, that record should be deleted. However, the record can be deleted only if no Requisition Candidates are associated with it. Deletion of the original Requisition record is not allowed.

3. How do Requisitions and Position Administration interact?

   If you are using Position Administration along with Requisition Administration, you must link each Requisition with a Position. By doing this you can search for all Requisitions associated with a specific Position.

Creating and Maintaining Requisition Candidates

Apply the Concept

1. True or False. Explain any false answers.

   a) Both Requisition Administration and Applicant Administration will reject a candidate record if no matching Requisition exists on the file.

   True.

   b) You can create a Requisition Candidate record in any Organization by using the Job Or Position Applied For form (003SCR).

   True.

   c) Requisition Candidate records can be added even if the associated Requisition status is Closed.

   False. A Requisition Candidate record will be rejected if the associated Requisition status is Closed. The form appears in View Mode only with a message that reads, 'Warning—This Requisition has a status of Closed'.

2. Consider your current candidate process. Describe the tasks and decisions your organization would make to implement Requisition Administration.

   Your answer is specific to your organization.

   Cyborg Answer: Requisition Candidates can be created manually using the Requisition Candidate - Basic Details form (R11SCR) or automatically by using the Job Or Position Applied For form (003SCR).

3. True or False. If false, explain.

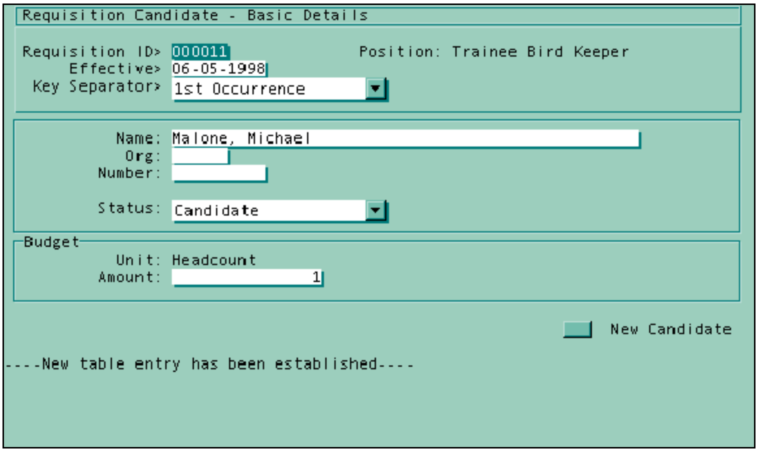
   When first created, a Requisition Candidate's status must be Selected/Not Empl'd.

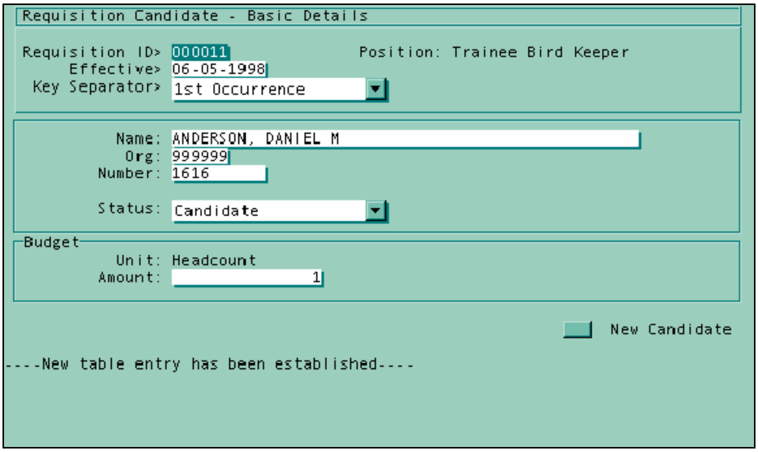
   False. Requisition Candidate records, regardless of the method used to create them, must have a status of Candidate.

Extended Practice

1. Create two Requisition Candidate records.

   Facts: Effective today, you received two Requisition Candidates for the Trainee Bird Keeper Position. One is an external candidate, and one is an internal candidate.





2. Modify each of the Requisition Candidate records to show that they have been Selected.

Requisition Candidate - Basic Details

Requisition ID> 000011 Position: Trainee Bird Keeper
Effective> 06-05-1998
Key Separator> 2nd Occurrence

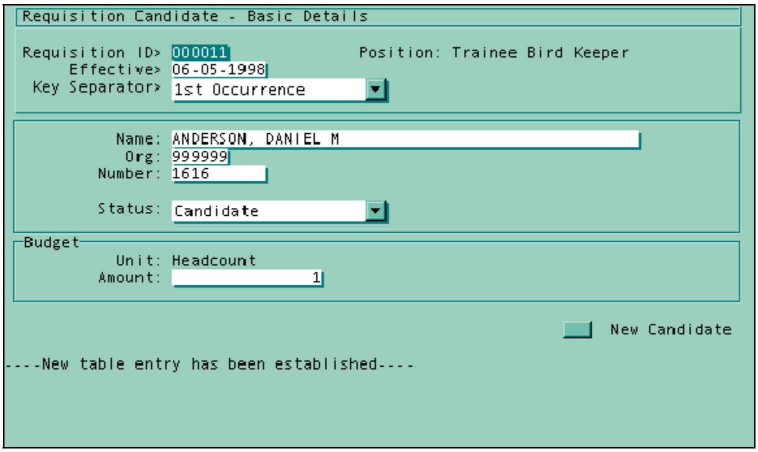
Name: Malone, Michael
Org:
Number:

Status: Selected/Not Empl'd

Budget
Unit: Headcount
Amount: 1

New Candidate

----New table entry has been established----



Requisition Candidate - Basic Details

Requisition ID> 000011 Position: Trainee Bird Keeper
Effective> 06-05-1998
Key Separator> 1st Occurrence

Name: ANDERSON, DANIEL M
Org: 999999
Number: 1616

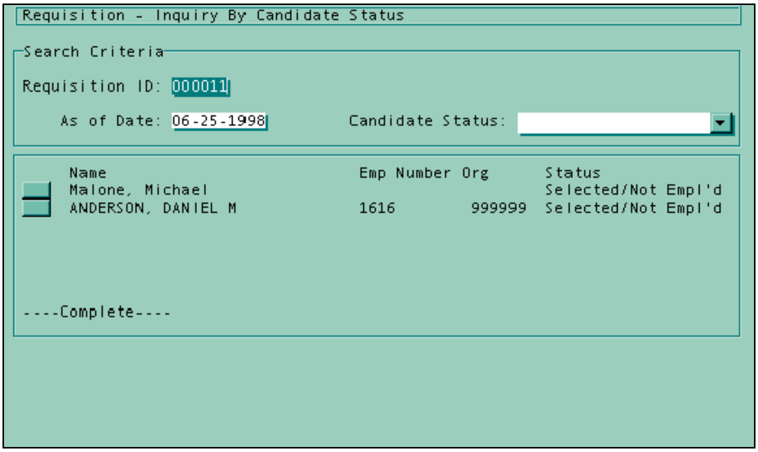
Status: Candidate

Budget
Unit: Headcount
Amount: 1

New Candidate

----New table entry has been established----

3. View the Trainee Bird Keeper Requisition Candidate records using the Requisition ID and 'as of' date options. What displays on the form?



Review of Questions Answered

1. What methods are available for creating Requisition Candidate records?

   Requisition Candidates can be created manually by using the Requisition Candidate - Basic Details form (R11SCR) or automatically by using the Job Or Position Applied For form (003SCR). Up to 9,999 candidates may be recorded for a single Requisition.

2. How and why can a Requisition Candidate status change?

   A Requisition Candidate's status when it is first created is Candidate. The Requisition Candidate status can be changed manually or automatically as the result of other processes.

   Manually change the status of candidates who have been rejected to Not Selected. If a candidate has been offered a Position, manually change the status to Selected/Not Empl'd. If a candidate notifies you that he or she no longer has an interest in the Position, manually change the status to Withdrawn.

   The Requisition Candidate status can also change because of other processes. If the Requisition status changes to Closed because all the vacancies have been filled, Requisition Candidates with a Candidate status are changed to Not Selected.

   The Requisition Candidate status can also be changed as a result of entries made on these forms:

   - Incumbency - Basic Details form (M40SCR)
   - Set Up A New Employee form (NH-SCR)
   - Employee Information form (EF-SCR)
   - Applicant Transfer form (ET-SCR)

3. What can be modified on a Requisition Candidate record?

If you change the Status entry, you will be prompted to also change either the Effective Date or the Key Separator for the Requisition Candidate.

You may create a new occurrence and manually change the Status field to any other option except Selected/Employed. That change may take place only through the hiring process.

If you change the Status from Candidate to Selected/Not Empl'd:

- The Requisition status must be Open-Authorized; otherwise, a Reject message is displayed that reads,'Requisition Status does not allow selection'.

- The Budget Amount may not exceed the Requisition Remaining Amount; otherwise, a message is displayed that reads, 'Candidate amount exceeds remaining limit'.

- The Requisition Remaining Amount field is updated.

Once a Requisition Candidate has a status of Selected/Not Empl'd or Selected/Employed, any changes that you make to the FTE, Hours, Headcount, or Salary are checked to determine whether the new value is within the Requisition Limit. The Budget Amount must be equal to or less than the Requisition Remaining Amount; otherwise, a message is displayed that reads, 'Candidate Amount causes Requisition Limit to be exceeded'. Changes to the Requisition Candidate Budget Amount cannot be made if the Requisition status is Closed.

If a Requisition Candidate's basic details have been established in error, that record should be deleted. However, the record can only be deleted if there are no modified Requisition Candidate records associated with it.

Changed Procedures when using Requisition Administration

Apply the Concept

True or False. Explain any false answers.

a) The Employee Information form (EF-SCR) and the Set Up A New Employee form (NH-SCR) display a second panel for entry of Requisition Administration data if both Position Administration and Requisition Administration are in use.

True.

b) If the second panel of the Employee Information form (EF-SCR) is processed, there is no effect on the Requisition Candidate - Basic Details form (R11SCR).

False. After the form is processed, a modified Requisition Candidate - Basic Details record (R11SCR) is automatically created using the employment date and a status of Selected/Employed.

c) If Position Administration is in use, an applicant transfer will reject if the employee has any current or future-dated Positions assigned.

True.

d) The Job Or Position Applied For form (003SCR), from Applicant Administration, cannot be used with all your Organizations, only your applicant companies.

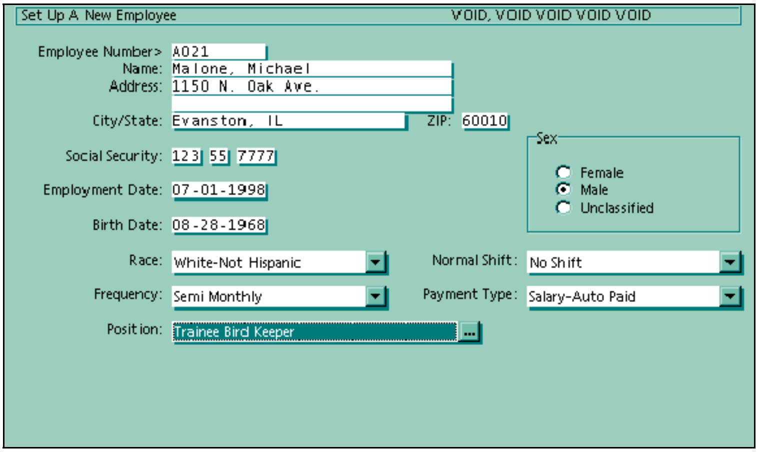
False. The Job Or Position Applied For form(003SCR), from Applicant Administration, has been changed and can now be used with all your Organizations, not just your applicant companies. This means that the form can now be used for your internal candidates who are not in an applicant Organization.

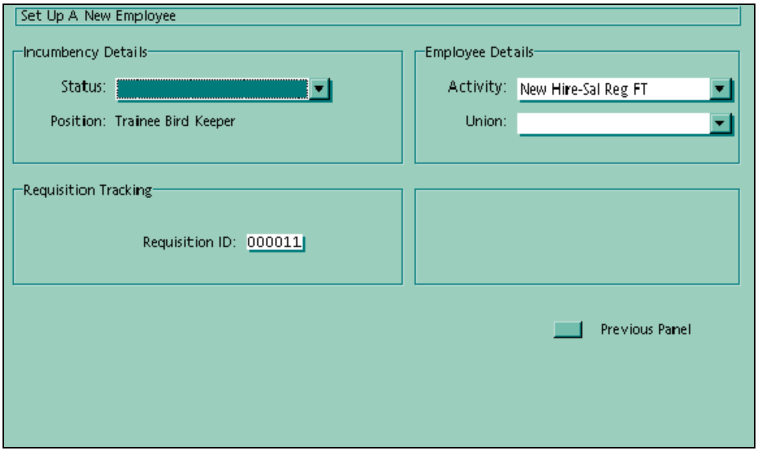
e) The Job Or Position Applied For form (003SCR) can continue to be changed during the candidacy and will continue to update the Requisition Candidate - Basic Details form (R11SCR) data. Once another Requisition Candidate - Basic Details form (R11SCR) entry is made, no further changes are allowed on the Job Or Position Applied For form (003SCR).

True.

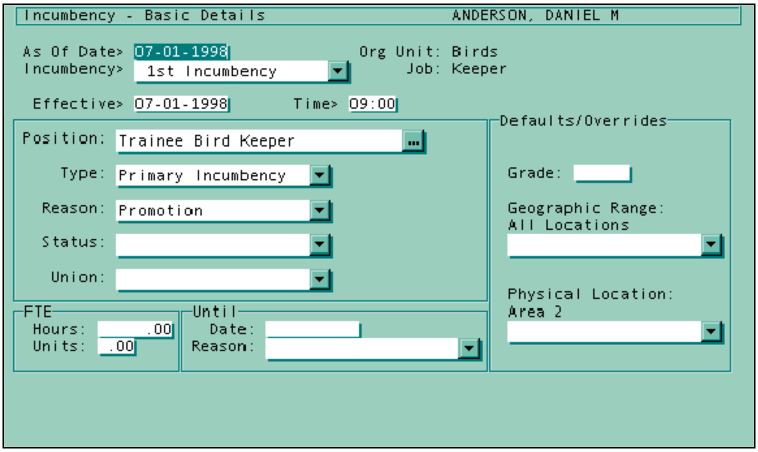
Extended Practice

1. Hire the external Selected Candidates for the Trainee Bird Keeper Position by using the Set Up a New Employee form (NH-SCR).





2. Hire the internal Selected Candidate for the Trainee Bird Keeper Position by using the Incumbency - Basic Details form (M40SCR).


Incumbency - Basic Details ANDERSON, DANIEL M

As Of Date> 07-01-1998 Org Unit: Birds
Incumbency> 1st Incumbency Job: Keeper

Effective> 07-01-1998 Time> 09:00

Position: Trainee Bird Keeper
Type: Primary Incumbency
Reason: Promotion
Status:
Union:

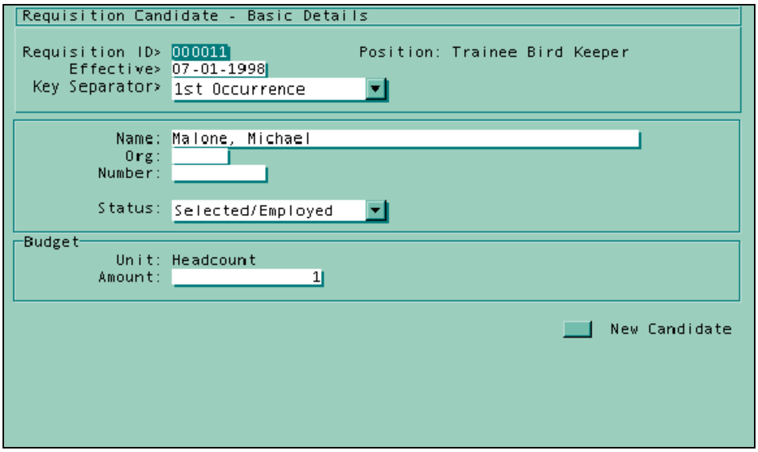
Defaults/Overrides
Grade:
Geographic Range:
All Locations
Physical Location:
Area 2

FTE
Hours: .00
Units: .00

Until
Date:
Reason:

3. View the resulting Requisition Candidate - Basic Details form (R11SCR) for each candidate. What is the status for each candidate?

Selected/Employed

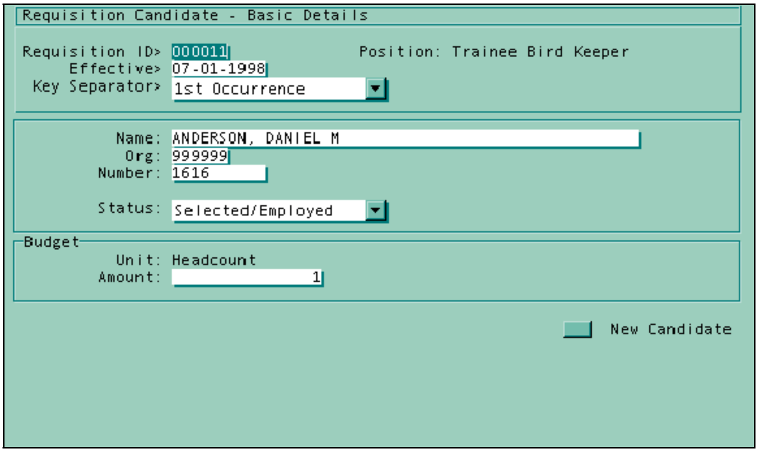

Requisition Candidate - Basic Details

Requisition ID> 000011 Position: Trainee Bird Keeper
Effective> 07-01-1998
Key Separator> 1st Occurrence

Name: Malone, Michael
Org:
Number:
Status: Selected/Employed

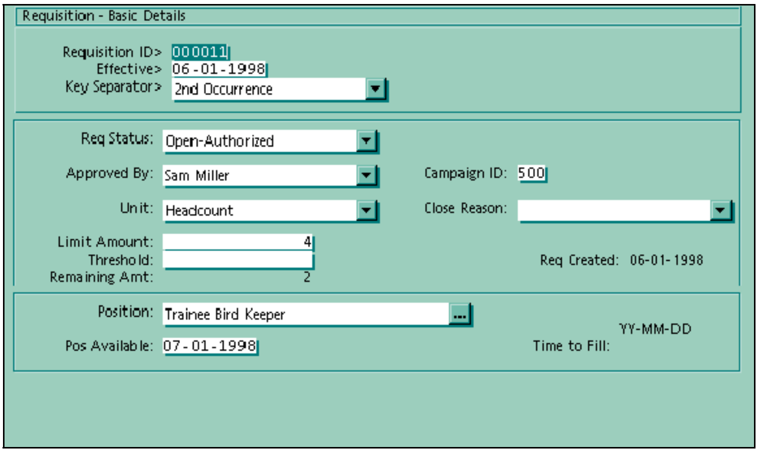
Budget
Unit: Headcount
Amount: 1

New Candidate



4. View the resulting Requisition - Basic Details form (R10SCR). What is the Requisition status?

   Open-Authorized, with the Remaining Amt set to 2.



Review of Questions Answered

What are the differences in form procedures and processes when using Requisition Administration?

If Position Administration is not in use, but Requisition Administration is, the following forms are processed differently:

Form	*Form Changes*	*Second Panel*	*Other Processes Affected*
Employee Information	*New Requisition ID field*	*No*	*Creates modified Requisition Candidate - Basic Details form (R11SCR)*
Set Up A New Employee	*New Requisition ID field*	*No*	*Creates modified Requisition Candidate - Basic Details form (R11SCR)*
Applicant Transfer	*New Requisition ID field*	*No*	*None*
Job Or Position Applied For	*Requisition ID has 6 positions instead of 8*	*No*	*Creates new Requisition Candidate - Basic Details form (R11SCR)*

If both Position Administration and Requisition Administration are in use, the following forms are processed differently:

Form	*Form Changes*	*Second Panel*	*Other Processes Affected*
Employee Information	*New Position field*	*Yes*	*Creates modified Requisition Candidate - Basic Details form (R11SCR) and Incumbency - Basic Details form (M40SCR)*
Set Up A New Employee	*New Position field*	*Yes*	*Creates modified Requisition Candidate - Basic Details form (R11SCR) and Incumbency - Basic Details form (M40SCR)*

Form	***Form Changes***	***Second Panel***	***Other Processes Affected***
Applicant Transfer	*New Position field*	*Yes*	*Creates modified Requisition Candidate - Basic Details form (R11SCR) and Incumbency - Basic Details form (M40SCR)*
Job Or Position Applied For	*Requisition ID has 6 positions instead of 8*	*No*	*Creates new Requisition Candidate - Basic Details form (R11SCR)*

Glossary of Terms

.EXE
A binary file containing a program in machine language that is ready to be executed.

.INI
A file that contains the parameters (values) used by the .exe file (program).

360-degree appraisal
Appraisals that include evaluations from an employee's managers and supervisors, peers, subordinates, and even customers, clients, and suppliers.

Absence data
Employee-level absence information that is entered on the absences forms.

Absence point
User-defined number that may be assigned for a particular absence and that can be totaled over time to determine if an employee is within the accepted number of absences for a time period.

Absence type
A classification of an employee absence, such as 'jury duty' or 'sick'. Employee absences are recorded by date and absence type.

Account timeout
The period of time that elapses before a user's account becomes invalid because of inactivity.

Accumulator id
A three-position, alphanumeric identifier for a benefits accumulator.

Acrobat
A suite of programs developed by Adobe Systems, Inc. For creating and distributing electronic documents. Programs in the suite allow you to create a portable document format (PDF) file for a document. You can then distribute the PDF file electronically to people who view the document with their freely distributed acrobat reader. People viewing a PDF file (or document) with the Acrobat Reader see the document with the exact layout intended by the author.

Action button
An action button performs an action such as saving the information you entered or telling the system you finished reviewing a page. An action button consists of an icon (or button) accompanied by underlined text (link text). For example, at various places throughout eCyborg Interactive Workforce you may see an action button displaying a check mark accompanied by the underlined text 'save changes'. You can click either the text or the button to save your changes to the page.

Activity code
Describes the clock transaction (ring) activity, such as clock start or meal end.

Activity types
With the time and attendance solution, you can set up the system so that an employee or group of employees may clock in and out for up to eight different activities: clock-in (1), break 1 start (2), break 1 end (3), meal start (4), meal end (5), break 2 start (6), break 2 end (7), and clock end (8).

Actuarial valuation
An examination of a pension plan to determine if contributions are being accumulated at a rate sufficient to pay the promised pensions.

Administration home page
The administration page that displays when a user logs on using his or her administrator user ID and password. The administration page displays links to individual administrator pages (eCyborg Interactive Workforce, Human Resources Administration, Benefits Administration, and Payroll Administration).

Administrative User ID
User ID created by an administrator with the role of eCyborg Interactive Workforce administrator. This ID

differs from the employee user ID generated for the administrator.

Aggregate tax method
Method of calculating taxes in which year-to-date income is used to project annual wages (using prorating), on which taxes are calculated. With this method, the amount of tax withheld can vary from pay period to pay period. This method is useful in preventing a salesperson from being over withheld as the result of fluctuations in commission over various pay periods. It is activated on the payroll solution by selecting aggregate/cumula tax (9) from the Withholding Method (PR09) option list on the Employee Tax Record Maintenance form. It is also referred to as cumulative tax calculation method.

Annualization
Process of calculating the annual amount of pay based on the number of pay periods and pay period amounts. Calculated by multiplying the number of pay periods in the year by the current taxable wages in the pay period.

Annualization factor
The factor that is used to multiply current pay period wages to determine annual wages. For example, a monthly pay frequency has an annualization factor of 12. The Payroll Solution typically calculates income taxes on the basis of annual wages. The annualization factor is entered by selecting an option from the Annualization (PP33) option list on the Company Pay Frequencies form for each pay frequency.

Annuitant
Someone entitled to receive or currently receiving payments from an annuity.

Annuity
A contract providing an income for a specific period of time.

Applicant
A person who is applying for a job or position in your organization. Internal applicants come from within your organization while external applicants come from outside of your organization.

Appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from 1-outstanding to 5-unsatisfactory.

ASCII
American **S**tandard **C**ode for **I**nformation **I**nterchange. The basis of character sets used in almost all present-day computers; US-ASCII uses only seven bits to convey some control codes, space, numbers, most basic punctuation, and unaccented letters a-z and A-Z.

Ask Me wizard
A natural language, full-text search facility within the online help. This allows users to type in a question, the wizard interprets the question, and displays related topics.

As-of reporting
Ability to report on data for a specified date or date range.

Audit record
A snapshot of information entered on a form. Audit records are stored on the employee database and are displayed on audit reports in an is/was reporting format. Adjustments and time entries are stored as audit records and are extracted for a payroll run in which they update the employee's record.

Audit report
A report that is available after the running of a program; it lists created records as well as error messages for records that could not be created.

Audit trail
A report of changes made to your employee database, such as the Payroll Audit Trail (0101) report.

Authorized absence
Absences that are generally considered as paid time away from regularly scheduled work.

Automatic plan
A plan that has been defined with a default option and default pre- or posttax indicator (also known as core/default plan).

Average deferral percentage
Percentage used in nondiscrimination and compliance testing mandated by US law. The calculation is defined as the contribution divided by the compensation.

Average rating
A rating used for performance appraisal systems with categories weighted by relative importance, where the average score reflects the weighted scores.

Back
Takes the user back to the previous page.

Badge
Time and Attendance Administration can be set up to use two different types of badge readers. The type of badge your organization uses, is determined by your third party badge reader software. The two types of badges are magnetic badges and bar code badges.

Badge error
Occurs when a badge is used to create a clock transaction (ring) and an employee has not been assigned to the badge.

Badge number
Up to ten-character ID stored on employee badges and clock transactions (rings) that tie clock transactions (rings) to an employee on the ***Employee Database*** (on page 172).

Banner
Banner forms separate groupings on forms produced from the Federal, State/Local, and Employee Queues.

Batch
A group of transactions submitted to the batch payroll processing system. Also, a collection of time entries that corresponds to an employee group, such as department.

Batch control record
Precedes all transactions separated by group; used to identify the company to which the transactions in that group apply. By entering anticipated totals for dollars and hours on the batch control record, you may verify your totals against those accumulated by the system.

Batch layout facility
A program that produces a segment layout for loading forms via batch. This was formerly known as BATCHL.

Batch number
An alphanumeric field on the batch control record containing a user-defined value used to identify a unique group of time entries or transactions.

Batch processing
A processing method that runs in the background and requires limited intervention.

Benchmark job
A standard or point of reference for determining total job points.

Beneficiary
A person named by the participant in an insurance or pension plan to receive any benefit provided by the plan if the participant dies.

Benefits control number
A four-position, alphanumeric identifier that specifies which tables are accessed for an organization.

Benefits statement
Report that indicates the coverage and cost of each benefits plan in which an employee participates.

Big option list
A large option list that includes a search facility. This was formerly known as a big codeset.

Bridge loan
A loan made to assist a relocated employee in purchasing a new residence before the sale of their old residence is complete.

Browser
Software application used to locate and display web pages. Modern browsers give users access to graphics, text, and multimedia information, including sound and video.

Budget plan year
A twelve-month period over which a salary budget is effective.

Budget scenario
The result of creating one or more salary plans in order to see the effect of different increase policies on the budget.

Budget setting
The process of analyzing and selecting an organization's salary budget for the coming plan year.

Cafeteria plan
A specific type of flexible benefit plan that allows employees to select their benefits from a number of benefit plans. This term may be used interchangeably with flexible benefits plan.

Calculation option list
An option list that contains calculation formula. This was formerly known as a calculation codeset.

Candidate
A person who is applying for a job or position in your organization and is under consideration.

Career planning
Providing career incentives such as advancement and additional education and training for individual employees in order to meet projected organizational needs.

Carrier record
A carrier record supplies information from one application area to another application.

Case-sensitive
A program that distinguishes between uppercase (capital) and lowercase (small) letters. A case-sensitive program that expects you to enter all commands in uppercase will not respond correctly if you enter one or more characters in lowercase.

Catalog
A file (with the extension of .cat) that contains all the information necessary for Impromptu to access and retrieve information from a relational database. The catalog provides a business view of the data, as well as information about what database to access, where the database is stored, and how the tables in the catalog are joined in the datamart.

Category code
General term used to refer to the option selected from category (PP01 and PP02) option lists on the company earnings and company deductions forms. It is used to indicate the type of earning or deduction.

CE/H
Abbreviation for considered earnings/hours.

Change control facility
A facility for updating and comparing your system control repository. This was formerly known as MAINTI/MAINTO.

Check box
A standard windows control that displays a yes/no setting, either checked (yes) or unchecked (no).

Check digit
Unique identifier that is generated by the TBLCHK program and used by the system to check the table relationship records.

Checklist
A list of tasks to be performed in sequence. The checklist displays within the navigator area. Checklists link tasks and other checklists together to perform work flow functions. Users can display a checklist by selecting a checklist icon within the tasks in the navigator.

eCyborg Interactive Workforce specific—a list of tasks/pages generally displayed in a chart with hot spots (links) for the checklist items. The user clicks the link to access the page.

Checklist item
An item appearing within the navigator when a checklist is being displayed. Checklist items include tasks, dialogs and even other checklists.

Checklist item status
Defines the status of a checklist item. These can be:

- Available to perform
- Required
- Not available
- Already completed

Checklist margin
The area of the navigator that displays the checklist item status when a checklist is being displayed.

Checkmark
If in the done column of a eCyborg Interactive Workforce checklist, indicates that an item on a checklist is complete. Can also indicate OK, finished, submit, and so forth.

Class
A class is an occurrence of a course that is specific to a location and a date, that is being administered using Training Administration. For example, 'eCyborg: Using the Web Client′ on Thursday, December 21, in Chicago is a class of the course 'eCyborg: Using the Web Client'.

Class evaluation results
These are the results as entered on the evaluation forms filled out by the class participants upon completion of the class. These results are recorded on the class evaluation results form.

Client data file
File containing information replicated from the System Control Repository. Used by client workstations to improve response time, since editing can be performed locally. May be located on each client workstation or may be located on a server and be shared by multiple client workstations on the network. Formerly known as the Client Control File.

Clock in and out
Also referred to as swipe/swiping the clock. When an employee uses their badge to record an activity time, they must pass their badge through the badge reader. This action can be referred to as clocking in and out.

Clock transaction
Record containing the information needed to create time entries for payroll processing. Clock transaction (ring) information includes date, time, and badge number. A clock transaction (ring) is created when a badge is swiped through a clock.

Clock transaction warning
Occurs when a clock transaction (ring) time falls outside of an employee's schedule warning times.

Closing costs
The costs associated with the purchase of a new house.

CLP
Abbreviation for certificates, licenses, and permits.

Codeset
A list of valid code values and associated descriptions from which you may select an appropriate entry. This is now known as an option list.

Coefficient
Customer-defined value used in the formula to calculate a new salary grade midpoint value.

Combined register (2222) report
A report that provides a detailed printout of all earnings, hours, taxes, and deductions for all the payments and adjustments made on a payroll run. It is Report Generator 2222.

Command button
A standard windows control that initiates a command of sets an option (previously known as push button).

Common tax organization
A method of setting up taxation in an organization in which all necessary tax specification records are contained in a single organization. The common tax organization often handles tax specification records more efficiently, since it avoids duplication of the federal tax records and of any state or local records used by multiple companies.

Communication event
A letter or email that can be triggered automatically or manually within the system. Communication events are set up by the system administrator and usually include data from a form or record.

Compa ratio
The ratio of a given salary compared with the midpoint of the salary range. The formula is the salary divided by the midpoint.

Competency
A requisite capacity to perform a single or set of skills or activities.

Complement limit
A 'complement limit' is the maximum number of complement units that can be assigned to a position at any one time.

Complement position
A 'complement position' is a position that is included in complement control.

Complement unit
A 'complement unit' is the type of unit used to measure the value of a position, for example, headcount, fte or hours.

Compliance
Conformity in fulfilling legal requirements.

Component
The first level of functional organization on the navigator or menu, such as employee resourcing or employee development.

Component icon
An icon that denotes the current component. There are a number of components within the system. Each component appears as an icon on the navigator.

Component plan
Any plan included under the flex master plan or grouped together under a group master.

Condition
Predefined criteria that can be added to a report's filter.

Considered earnings
An employee's paid earnings that are to be accumulated, based on plan rules, for use in determining credited service or calculations of final benefits amounts.

Considered earnings/hours (CE/H) accumulators
Used only in benefits plans to accumulate the earnings and hours an employee has acquired toward eligibility for a deferred plan. Accumulators may be retained on a monthly, quarterly, or annual basis.

Considered hours paid
Actual number of hours for which an employee was paid and that are to be accumulated based on plan rules.

Considered hours worked
Actual number of hours an employee worked. These hours are to be accumulated based on plan rules for use in determining credited service for a plan participant (or for a non-participant if eligibility has been met).

Consolidated reporting
Option that enables packaged reports to be processed for all organizations (consolidated).

Customer-defined value used in the formula to calculate a new salary grade midpoint value.

Context-sensitive help
Information about an object and its current condition. It answers the question 'what is this?'

Contribution type
The type of contribution being made to a benefits plan. The system allows for the deduction and accumulation of up to five different contributions per plan: basic employee pretax, basic employee posttax, supplemental employee pretax, supplemental post-tax, and organization.

Control 1-2
A company or group of employees (now known as an organization).

Control levels
A hierarchy of values used to determine the breakdown of an organization for reporting purposes. The values are user-defined.

Control number
An alphanumeric designation assigned to a table to define the table records that will be used for each organization.

Conversion
A method for transferring data from either a manual or automated system into the system.

Co-ordinator
A coordinator is an instructional institution, organization or person who administers training courses.

Core plan
One of the plans that make up the minimum benefits in which all eligible employees are required to enroll—for

example, medical and life. Employees who fail to return enrollment forms with their benefit choices may be automatically enrolled in the core plans (also known as default plans).

Cost categories
Cost categories are classifications or divisions used to separate costs for training into broad groupings, for example, equipment or operating costs.

Cost types
Cost types are used to further define training costs. For example, the category of equipment could be further broken down into the cost type of overhead projector and monitor rental.

Costing
Projecting the future cost of a benefits plan contribution for budget purposes.

Course
A course is a separate unit of instruction in a subject being administered using the training administration solution. For example, 'eCyborg: Using the Web Client′ is a course. This may be applied to a training course provided internally or externally.

Course directory
A course directory is a list of all available courses.

CPI
Characters **p**er **i**nch

Credited service
The number of years of employment for which an employee is given credit for use in determining final benefits amounts.

Crew
A group of employees who rotate from one schedule assignment (shift) to another, following a rotation pattern.

Crew code
A unique, one-character, alphanumeric identifier of a crew.

Cross-reference keys
Provide direct query access to data within the system database.

CSL
Abbreviation for ***Cyborg Scripting Language*** (on page 169).

Cumulative data
Also called 'to-date data'. includes payroll earning, deduction, net pay, taxable wage, and tax to-date figures for employees.

Cursor
A special symbol, usually a solid rectangle or a blinking underline character, that signifies where the next character will be displayed on the screen. To type in different areas of the screen, you need to move the cursor. You can use the arrow keys or a mouse to move the cursor.

Customer-defined
Values that depend on an organization-specific definition--for example, option list.

CYB88X
An English Language root program used to set the production version switch to on or off, in addition to other automatic settings.

Cyborg Scripting Language
Cyborg's fourth-generation programming language, previously called English Language.

Data extract
Method for extracting information from The Solution Series for the purpose of subsequently loading it into eCyborg Interactive Workforce databases.

Data load
The process of moving data from one system or media to another. It encompasses data mapping, data extraction and conversion, and the actual loading of the data. Also the method of loading data extracted from The Solution Series into eCyborg Interactive Workforce databases using programming scripts.

Data mapping
The process of identifying, comparing, and matching data (field to field) to be converted from one system or media to another.

Database
A collection of information organized so that a computer program can quickly search for and select

specific pieces of data. Think of a database as an electronic filing system.

Datamart
Relational tables with a defined structure that have been designed to automatically accept full datamart extract data seamlessly.

Deduct credits by plan
A method of distributing flexible benefit credits. The total monetary value for credits is prorated based on the employee's pay frequency. Credits are given to employees as earnings added to their pay; the cost of individual employee plans are collected through payroll deductions and listed on the employee's payment stub.

Deduct credits by plan method
A method of distributing flexible benefit credits. Credits are given to employees as earnings added to their pay; the individual employee plan costs are then collected through payroll deductions.

Deduction
An amount subtracted from available net pay. Deductions can be involuntary (child support or maintenance) or voluntary (pension plans).

Deduction cycle
A predetermined schedule for taking voluntary deductions, based on the defined frequency.

De-enrollment
The process of shutting off plan benefits for an employee for reasons other than a separation activity.

Deferred compensation
Any benefit that is not immediately payable to an employee, but is instead deferred to a later date. This term refers to retirement vehicles, including all defined benefit, defined contribution, stock, and thrift/savings plan.

Deferred plan
Any benefits plan in which benefits are not immediately payable to an employee, but are deferred to some later date. This term refers to retirement vehicles, including all defined benefit, defined contribution, stock, and thrift/savings plans.

Delimiter
A character that tells the system where an item of data ends and another starts.

Dependent
An individual who relies or depends on another for his or her support.

Dependent number
A unique number in the eCyborg Interactive Workforce database that identifies an employee's spouse and his or her other dependents.

Detail page
A page in eCyborg Interactive Workforce that displays detailed information. Summary pages contain links to the detail for each record.

Dialog box
A secondary window that appears on the screen to present information or request input. Dialog boxes are generally temporary—they disappear after you enter the requested information.

Disability insurance tax
A tax required by some us states to be funded by employee-paid contributions to pay all or part of the cost of disability insurance coverage. On the Payroll Solution, us state disability insurance tax records are established as Type 4 taxes.

Disciplinary action
Action taken against an employee for violation of an organization policy or procedure.

Discretionary increase
A salary increase amount or percentage determined by a manager according to the guidelines established by the organization.

Display
Make data or images display on a computer monitor.

Display box
An area on a form in which data is displayed (formally known as an inquiry field).

Disposable income
For garnishment purposes in the us, an employee's earnings minus deductions required by state or federal law.

Distributed location
A customer location where data changes are replicated and may be distributed. A DL is identified to the system by a unique 5-position alphanumeric node ID.

Distribution
The process of passing data from a source DL to one or more target DLs.

Distribution rules
A set of parameters that determine how data will be distributed from one DL to another. These are defined at each DL by the owner using the distribution rules screens. Distribution rules are stored in tables that are not replicated (thus, they cannot be distributed).

DL
Abbreviation for ***distributed location*** (on page 171).

Double-click
Click a mouse button twice in rapid succession.

Drop-down list
A drop-down list is a view of the acceptable entry options available for a text box.

Drop-down list box
A standard windows control that displays a current setting but can be opened to display a list of choices. The user selects a choice by double clicking on the choice. The user can type into the field, and the system moves the list of choices to the last letter typed.

Dynamic SQL
Statements created by a program that must be interpreted and converted to executable sql statements at run time.

Earned income credit
A refundable amount that reduces the tax owed by certain low-income individuals in the us who meet adjusted gross income levels.

Earning
Money paid in return for work performed or services rendered. In Payroll Administration, earnings are separated by earning numbers into various categories such as regular pay, overtime pay, shift pay, bonuses, and so forth.

Earnings category
Used to categorize similar earnings. For example, all the overtime earnings can be grouped into category 01, all the shift differentials/premiums into category 06, and so forth.

EBCDIC
Extended **B**inary **C**oded **D**ecimal **I**nterchange **C**ode; binary code for alphabetic and numeric characters developed by IBM for its computers.

eCyborg Interactive Workforce Home
Button on every page that returns the user to the eCyborg Interactive Workforce Home Page.

eCyborg Interactive Workforce Home page
Home page that displays each time employees log on to eCyborg Interactive Workforce after completing the new user tasks on the New User Home page.

Effective date
Date on which an event takes place, for example, an enrollment or benefits plan change.

EIC
Abbrevation for ***earned income credit*** (on page 171).

EL
Abbreviation for English Language, now called CSL (Cyborg Scripting Language).

Electronic Performance Support system
Online tools that help users perform their job quickly and efficiently. EPSS can include online help, computer-based training (CBT), electronic manuals, wizards, and so on.

Email
Literally 'electronic mail'. This is a message that is sent to one or more people within or outside of your organization by an automated email software package.

Employee cancellation
An employee cancellation occurs when an employee is canceled from attending a training class or training program.

Employee Database
The file that contains organization and employee records. This is File02. It was formerly known as the Master File.

Employee Database record
The complete record for an employee. It may be composed of multiple physical records.

English Language
Former name of Cyborg's fourth-generation programming language, now called Cyborg Scripting Language.

Enrollment form
A customer-defined form used by employees to record their benefits elections and any associated dependent and/or beneficiary information.

Entitlement accrual
An accumulation of hours for an employee benefit, such as sick leave or vacation time, commonly known as an accrual.

Entity
Each Organization Unit, Job, Position, and Incumbent is an entity. Together they are entities.

Entry field
An area on a screen or browser page where the user can input information.

Entry form
An entry form is a form used to enter data.

Environment
The host platform and workstations where your Cyborg system resides, and any communication protocols. Also, a work space dedicated to a specific processing type. For example: development, test, and production.

EPSS
Abbreviation for ***Electronic Performance Support system*** (on page 171).

Establishment Reporting
Establishment Reporting occurs when an employer with several business locations chooses to file wage reports, broken down by location or unit, to the Social Security Administration. Each unit is identified by a four-character code, called an Establishment Number.

The employer obtains approval from the SSA to use Establishment Reporting. Establishment Reporting does not apply to 1099s.

Event
The combination of a trigger (changes made to system data) and an action (the creation of an email or letter). Events always consist of these two component halves.

Excused absence
Absences from regularly scheduled work that can be considered as either paid or unpaid time off.

Extract file
A data file generated to be used by another system or application.

Federal Insurance Contributions Act
The United States Federal Insurance Contributions Act imposes two taxes on both employers and employees. Tax is withheld from an employee's wages to finance the Old-Age, Survivor's, and Disability Insurance (OASDI) social security program and the Hospital Insurance (HI) medicare program. Employers are then required to match the amounts withheld from employees. On the Payroll Solution, employee information for FICA-OASDI social security tax is entered on tax record 101 and FICA-HI Medicare tax on tax record 103.

FICA
Abbreviation for Federal Insurance Contributions Act.

Field
A data item on the database. This is usually displayed on a form as a text box.

eCyborg Interactive Workforce specific—A space allocated for a particular item of information. A tax form, for example, contains a number of fields: one for your name, one for your Social Security number, one for your income, and so on. Every field has a name (also called a field label).

Filter
Device used by report to select certain rows of information from the database, thus limiting the amount of data from the database to be viewed in the report.

Finished
Users click Finished when they have completed all information on a checklist or other *ESS* page.

Flat rate tax
A US local tax that is calculated as a standard percentage rate and that is calculated in the same way for all employees (that is, factors such as marital status do not enter into the calculation). For many such local taxes, Cyborg does not provide tax specification information on the Tax Authority File. Instead, you need to enter a Tax Specification Record for the tax on a Tax Specification Information form, indicating the tax rate in the Flat Rate text box.

Flex credits
Units granted to an employee in order to purchase benefits under a Flexible Benefits Program.

Flex Master Plan
Defines your Flexible Benefits Program and ties component plans together as a group. Employees are enrolled in the Master Plan and then select the benefit plans in which they wish to participate—for example, medical, dental, and life. Flex master plans are set up in Benefits Administration and used by eCyborg Interactive Benefits to display benefit plans to users for initial and open enrollment.

Flex plan
A benefit plan where, in addition to a core of basic benefits (if applicable), the organization/company allocates to each employee a credit for purchasing additional benefits tailored to their individual needs. Flexible benefit plans may include a flexible spending account.

Flexible Benefits Plan
A specific type of benefit plan that allows employees to select their benefits from a number of benefit plans. This term may be used interchangeably with cafeteria plan.

Flexible Benefits Program
A benefits program in which an organization may allocate to each employee a pool of credits or a monetary amount that is to be used to purchase benefits tailored to individual needs.

Flexible Spending Arrangement
A benefits welfare plan set up as an account in an employee's name that is used to reimburse the employee for certain personal expenses. In the United States, these accounts are provided by employers as a way for employees to pre-fund dependent care, legal services, or medical expenses with pretax currency.

Folder
Logical organization device for the content of a Cognos catalog.

Form
A window of information that appears within The Solution Series, including text boxes and other controls. This was formerly known as a screen.

Form area
An area of the window that contains a form.

Form Builder
A tool provided by Cyborg Systems for use with The Solution Series for designing forms.

Formal education
Education that is obtained from a college or university.

Forward
Displays the next page.

FSA
Abbreviation for Flexible Spending Arrangement.

FTE
Abbreviation for Full Time Equivalent.

FTP
File **T**ransfer **P**rotocol. A means of allowing a user on one computer to transfer files to and from another computer over a network

Full Time Equivalent
The ratio of total working time to the time that represents full time employment for a single employee. For example, an FTE of 0.5 means working half of the time that represents full time employment.

Funeral days
Absences from regularly scheduled work due to a funeral, which at the discretion of the organization, can

be considered as authorized or unauthorized, paid or unpaid time off.

Gap analysis
Comparison of a current state of being with a desired state of being. For example, you could perform a skill or competency gap analysis on individual employees or on the workforce as a whole, comparing the existing state of skills and competencies with the required state or level of skills and competencies.

Garnishment
A legal procedure authorizing a deduction from an employee's earnings to satisfy a legal requirement.

General ledger interface
A file that provides a balanced payroll journal for the period. This file contains journal entries for labor expenses, withheld deductions, income, disability, UI, and other withheld taxes, net pay, and company-paid taxes. The interface may also be produced on paper.

Go to details
Displays a new page with detailed information. Used on summary pages.

Graphical User Interface
The Solution Series provides integrated human resource and payroll functionality via the Microsoft Windows Graphical User Interface. These are the elements that display on your screen.

Grievance
A formal complaint made by an employee against the organization usually because of an unsatisfactory working condition or other work-related dispute.

Gross wages
The total of all earnings paid to an employee.

It is stored in the Total Pay (field 119 of the US Tax Authority File) field of the employee's US FICA tax record 101 (FICA-OASDI). This figure appears on the Combined Register (2222) report as Total Pay. It does not appear on US W-2 forms.

Group box
A standard Windows control that groups a set of controls.

Group plan
Defines any number of benefit plans tied together as a group. Group plans are used to define common eligibility and to cluster plans for reporting purposes.

GUI
Abbreviation for Graphical User Interface.

Handicap
Having a physical or mental disability that substantially limits activities especially in relation to employment or education.

Health and safety profile
Data on the employee record that includes information such as the employee's blood type, language, physician, emergency contacts, and any disabilities.

HED
Acronym for Hours, Earnings, and Deductions. Each earning or deduction must be established in The Solution Series with a unique identifying three-digit code. HEDs are used to record pay, hours worked, and deduction amounts and arrears for each employee.

Help
Hot spot on an eCyborg Interactive Workforce page that displays step-by-step directions for completing the page.

History record
Part of an employee's payment history; a snapshot of a check paid to an employee or an adjustment made to an HED or tax.

Holiday days
The time off that all employees are entitled to based on the decision of the organization or government regulation.

Home page
The main page of a Web site that generally serves as an index or table of contents to other documents stored as pages on the site.

HTML
Abbreviation for **HyperText Markup Language,** the authoring language used to create documents on the World Wide Web. HTML defines the structure and layout of a Web document by using a variety of tags and attributes.

Import facility
A tool delivered with The Solution Series that moves data from an external source to any organization or employee form.

Import record
A line in a spreadsheet or delimited file that contains employee or company data.

Inactive plan
A benefits plan that no longer allows employee enrollment.

Inactive tax record
An employee tax record that is no longer in effect for a given employee. Neither wages nor taxes are accumulated for the particular tax record. However, any wages and/or taxes already accumulated remain until clearing is performed. Such clearing is usually performed in preparing the Employee Database for a new year. The inactive records can be deleted at this time. The process of making a tax inactive is called deactivating.

Incumbent
An incumbent is an employee linked with a specific position. The linking of an employee with a Position is an incumbency. An employee may be linked to more than one position; in other words, an employee with multiple incumbencies. A position to which more than one employee is linked has multiple incumbents.

Information-level security
These records grant access to employee and table data via specific password records.

Initial Administrator
Only user whose user ID and password are created during installation. The initial administrator always has authority to all administrative functions: eCyborg Interactive Workforce, Human Resources Administration, Benefits Administration, and Payroll Administration, and can assign administrative roles to others by creating administrative user IDs and passwords.

Initial passwords
Password generated by eCyborg Interactive Workforce for each user ID extracted from The Solution Series. Users must create a user-defined password when they log on to eCyborg Interactive Workforce for the first time.

InitialAdmin
See Initial Administrator.

Inquiry form
A inquiry form is a form used to view data already entered.

Instructional text
Any paragraph(s) on the page that explain the function of the page or fields to the user.

Internal candidate
An employee of your organization who is applying for another job or position in your organization.

Internet
A global network connecting millions of computers.

Intranet
A network belonging to an organization, usually a corporation accessible only by the organization's members, employees, or others with authorization and used to share information.

Investment funds
Different options or accounts available to employees for allocating their contributions, usually applicable to thrift/savings plans.

IPEDS
Integrated Postsecondary Education Data System.

Job assignment
A job associated with a particular employee.

Job code
A designation for a job assignment.

Job streams
A generic reference, Job Control Language, for your operating system's command language.

Alternately: Jobstreams

Job type
A generic category that further defines a particular job.

Jury duty
This is compulsory service on court appointed juries. Employers are required by law to excuse jury duty

related absences. They are not, however, required by law to pay the employee during this time away from the job.

Label
Text that describes the information the user enters into the field.

Labor record
A record containing the hours, amounts, associated charge-to control levels, and function assigned on the employee's Payroll Home Location/Pay Allocations form.

Leave of absence
Occurs when an employee leaves the organization for a period of time, usually temporary, for personal reasons such as medical leave.

Log off
Logs the user off the system. When referring to the Log Off button, use initial caps.

Logical Employee Model
A collection of default employee information that is used to create a model. Logical Employee Model templates are used when hiring new employees to save time and ensure that critical information is established consistently and correctly. These were formally known as LMODELs.

LPI
Lines **p**er **i**nch

Mailing address
An address, other than your legal residence address, to which you have your mail sent.

Maintenance payroll run
A maintenance payroll run automatically updates organization and employee records, but it does not process time entries or generate payments, pay slips, or deposit advices. It is also used to create payment history records.

Major activity
Event that causes a change in an employee's employment status, such as a new hire, termination, or rehire.

Mandatory field
A field that requires the user to enter information before the user can exit the screen or page.

Map file
Stores the predefined relationships between an import file and a form.

Mass time entry creation
Creating time entries for a group of employees through one program execution, such as for a paid holiday.

Master File (0202) report
A Cyborg report that produces a formatted display of the data in an employee's current batch Employee Database record. This includes the wages and taxes accumulated for the employee, covering current, month-to-date, quarter-to-date, and year-to-date information for individual tax codes. It is report generator 0202.

Matrix ID
Unique identifier for each pay-for-performance matrix.

Menu
A list of choices; the choices are generally links that take the user to another screen or page.

Menu bar item
A menu that appears on the menu bar.

Message area
An area of the window that contains messages or selection lists relevant to the current form. The Message Area can be turned on or off.

Method code
One of many specific routines (usually delivered by Cyborg and identified by a two-character code) used to calculate earnings and deductions.

Midpoint
The middle of the span of currency from the minimum to the maximum of the employee salary grade.

Minimart
Relational tables you create so you can insert data from your Subset data extractions.

Monetary perquisites
A privilege or profit that an employee is entitled to that is incidental to regular wages or salary.

Moving expenses
The expenses incurred by an employee due to moving from one location to another for employment purposes.

Multiple master
A file compression technique that duplicates the current employee Permanent Master Record as many times as there are payments to that employee during one pay period. These multiple masters are detail records reflecting the amounts for the payment being made (current), and the adjusted MTD, QTD, and YTD totals. The system uses multiple master records to create history records showing the current payment figures only.

Navigation bar
In eCyborg Interactive Workforce the Navigation bar shows the name of the page you are using, for example, 'Mailing Address'. The top line of the Navigation bar shows the path you took from the Home page to reach the present page. Links on the Navigation bar let you return to the home page or log off the system.

Navigator
Left pane of the work area which forms the main method of moving through the forms. From the Navigator users select the component, process, and task in which they are interested.

Net credit method
A method allocating flex credits. An employee's cost of benefits is calculated as either a net cash earning or a net deduction from the employee's pay. The net amount is the difference, either plus or minus, between the credits allocated to the employee and the cost of his or her flex benefits choices.

New hire
Process of hiring a new employee for your organization.

New user
A user of eCyborg Interactive Workforce who has not yet completed reviewing and updating their personal information on the New User Home page.

New User Home page
Home page that displays for new users of eCyborg Interactive Workforce until they complete reviewing and updating their personal information.

Node
A Distributed Location.

Node ID
A unique 5-position identifier for a node. The naming convention is defined by the user.

Number registered
This is the number of employees registered for a training class. It is updated and displayed on the Class Schedule form.

Object
Each System Control Repository record type is assigned an object code. A single record type can have several object codes assigned to allow limited display.

Object key
A field that allows you to specify the System Control Repository record group you want to display. The value of this field is dependent on the type of information you want to display.

Obsolete plan
A benefits plan that will no longer be used.

Off cycle
An off-cycle payroll run is an additional payroll for the period just completed. An off-cycle payroll run is commonly used to process nonstandard payments, such as bonuses. It is sometimes referred to as an additional or bonus payroll run.

Online
Turned on and connected, for example, printers are on-line when they are ready to receive data from the computer. Users are considered on-line when they are connected to a computer service through a modem. That is, they are actually on the line.

Open enrollment
A period of time during which employees can enroll in or change their benefit choices for the upcoming year, generally in October or November.

Operator ID
A four-character code that identifies the user to the system.

Option
An item in the option list for a field. This was formerly known as a codeset item.

eCyborg Interactive Benefits and Benefits Administration specific—In Benefits, the plan coverage that an employee selects, such as single or family coverage.

Option button
A standard Windows control that allows you to select from a fixed set of mutually exclusive options (previously known as radio button).

Option list
An option list is a list of options that are available within a Text box. This was formerly known as a Codeset.

eCyborg Interactive Workforce specific—Options available in The Solution Series that the eCyborg Interactive Workforce administrator loads in to eCyborg Interactive Workforce. The options are then available in the drop-down list boxes in eCyborg Interactive Workforce.

Organization
A group of employees who are employed in a common structure, governed by the same set of rules or policies, and eligible for the same earnings and deductions For example, your organization may be structured into parts that represent employee groups such as active, union, retirees, applicants, and so forth.

Formerly known as a company or Control 1-2.

Organization Level 3
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so forth, as defined by you.

Organization Level 4
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Level 5
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Level 6
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Number
A six-character user-defined code that represents an organization; the highest level of the organizational structure in Payroll Administration.

Formerly known as a Control 1-2.

Organization Unit
An organization unit ('Org Unit') is a grouping of Positions within an organization (for example, Accounts Department).

Organization Validation table
A table that validates that an organization is valid and payments can be made.

Organization-specific tax setup
A method of implementing Tax Specification Records in which each organization involved in tax processing contains all the specification records required to process taxes for its employees, as opposed to a common tax organization.

Override file
A file used to maintain COBOL or Report Generator changes to the system.

Packaged reporting
A processing mode in which a job is scheduled to be run at a certain time.

Paid absence
Employee absence that will be paid by the organization. A time entry will be created for this absence.

Parallel run
The process of executing the same programs simultaneously on two separate systems to obtain the same or similar results.

Parameter form
A form that is displayed when certain programs are called from the Navigator or menus. The form facilitates entering parameters for the program.

Password
A secret series of characters, generally user defined, that enables you to access a computer, a software application, or a file. On multi-user systems, each user must enter his or her password before the computer will respond to commands.

In eCyborg Interactive Workforce, the password ensures that unauthorized users cannot access user-specific information.

Password aging
The period of time that elapses before a user-defined password expires and the user must change his or her password.

Pay allocation
A means of allocating, on a percentage basis, employee labor hours and amounts to multiple sets of control levels 3 through 6 and function to accurately reflect employees whose labor must be charged to more than one area within an organization.

Pay document
A pay slip or deposit advice with its associated pay stub.

Pay frequency
The interval at which a group of employees is paid. Examples are weekly and semimonthly. Also referred to as a payroll period.

Pay schedule
A predetermined schedule for a calendar year, identifying period-end and payment dates for each pay frequency.

Pay stub
A preprinted form, corresponding to a check or deposit advice that lists all earning, gross pay, taxes, deduction, and net pay information for an employee.

Pay-for-performance matrix
Chart representation of the variables that result from the combination of salary increase information, how much to give and when.

Payment history record
A record documenting the detail information for a payment or adjustment. Multiple payment history records may be generated for an employee, reflecting multiple adjustments or payments. These records include all earning, deduction, and tax information included in the payment or adjustment.

Payroll home location
The location where the employee is normally assigned to work and where labor distribution information is charged. An employee's home location comprises specific Payroll Levels and is always assigned Allocation Number 01 on the Payroll Home Location/Pay Allocations form. The Function field may also be used as part of a home location, depending on your specific requirements.

Payroll Level 3
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so forth, as defined by you.

Payroll Level 4
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll Level 5
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll Level 6
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll period
A defined period of time for which an employer pays wages to employees.

Payroll Process Control
A series of forms used during the Payroll Process to determine the type of run (payroll run or maintenance run). Allows you to specify the pay frequencies to be paid and which reports are to be produced.

Payroll run
Updates organization and employee records, processes time entries, calculates employee pay, generates pay documents and payroll reports, including the Combined Register. It also produces a variety of special interface outputs.

PCL
Printer **C**ontrol **L**anguage

PDF
A file format that captures formatting information from a variety of desktop publishing applications, making it possible to have formatted documents appear on the screen and be printed. To view a file in PDF format, you need Adobe Acrobat Reader, a free application distributed by Adobe Systems.

Peer-group appraisal
Appraisal that uses performance evaluations completed by an individual employee's co-workers or project team members.

Pending de-enrollment segment
Plans for which an employee is enrolled, but has lost eligibility, as listed on the Pending Plan Enrollment/De-Enrollment form.

Pending eligibility segment
Plans for which an employee is eligible but not enrolled, as listed on the Pending Plan Enrollment/De-Enrollment form.

Performance appraisal
A periodic assessment and ranking of an employee's skills and accomplishments.

Performance appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from 1-Outstanding to 5-Unsatisfactory.

Performance rating
A method of ranking the performance of an employee during a given period using options ranging from 1-Outstanding to 5-Unsatisfactory.

Performance-related pay
Monetary payments made to employees based on how well an employee has fulfilled job expectations.

Perquisites
Property or privileges extended to an employee.

Personal days
Authorized absences that are generally considered as paid time away from regularly scheduled work, but can be either paid or unpaid.

Phonetic keys
The keys you use to access employee data using the phonetic spelling of an employee's last name.

Pixel
The smallest rectangular area of an image on a screen.

Plan deactivation
A process that makes a plan inactive and prevents future employee enrollment.

Plan ID
A three-position, alphanumeric identifier for a plan in the system.

Plan shutdown
The process of de-enrolling an employee from all benefits plans because of a separation activity.

Plan year
The 12-month period over which a salary budget is effective.

eCyborg Interactive Workforce specific—The calendar, policy, or fiscal year in which the records of a Benefits plan are maintained.

Policy tables
Highest level tables that are used to record the generic (or master) rules for an organization or group of employees. These included your organization's rules relating to working time procedures, such as clocking in and out, docking for lateness, and overtime. Each

policy consists of a Policy Master table and one or more Policy Activities table.

Pop-up menu

A menu that appears when you use the second mouse button within the system. This menu contains context sensitive commands and options that relate to the object you have clicked on.

Portable document format

See PDF.

Position

A specific role with an organization—for example, Accounts Manager.

Alternative definition: to place an object in a specified location.

Position Administration Control Number

Two-character alphanumeric value that tells Position Administration which tables to use for a specific company.

Position complement

A 'Position complement' is the value of a Position. The organization complement is the total value of all Positions included in the complement.

Position in range

The difference between a given salary and the minimum of the salary range, divided by the difference between the range's maximum and minimum, and expressed as a percentage.

Posttax

A contribution made after taxes have been withheld from earnings.

Premium

The amount of money an organization agrees to pay an insurance company for a policy or annuity, or the amount contributed by an employee to the employer to cover the employee's portion of the total premium.

Prenotification

Informing a bank or credit union that an employee will be using direct deposit with them in the future. Cyborg recommends that you fill out the Direct Deposit Information form two pay periods in advance of the first deposit date. This ensures that a prenotification record is provided to the bank or credit union in a timely manner.

Pretax

A contribution made before taxes have been withheld from earnings.

Primary account

The account set up in eCyborg Interactive Workforce to receive an employee's pay or reimbursement checks. After deductions and deposits to additional (secondary) accounts, the remainder of pay is deposited into the primary account.

Process

A subset of a component that logically groups tasks on the Navigator or menu. For example, the process 'Maintain Employee Details' contains tasks such as 'Basic Employee Information' and 'Personal Information'.

Alternate definition: An action that brings about a result.

Process bar

The graphical representation of a process on the navigator. Each process bar is within a Component.

Program

A program is a series of classes being administered using Training Administration. For example, 'The Cyborg Training Schedule for January-June 1996' may be a program consisting of eight different classes.

Alternative definition: a form or other program within the system, accessed directly from the Command dialog box. For example, form EF-SCR is a program.

Protected amount

The amount of disposable income protected from garnishment in the US This amount may vary from state to state.

Prototype HED

An HED defined on a benefits form for use in recording employee/organization contributions when an employee is enrolled in a benefits plan. This allows the setup and maintenance of payroll deductions using Benefits Administration.

Provider
A provider is an instructional institution, organization, or person who is available to teach training courses.

Push button
A button on the interface which appears depressed when clicked on (now known as command button).

Quartile
Points that represent the division of a salary grade range into four equal parts.

Query alternate keys
The keys you use to access the employee master record in an order other than by primary key.

Query primary keys
The keys you use to direct your QUERY program to a record type.

Quick Hire
The process of hiring an employee by entering one two-panel form with the required data elements rather than entering a series of forms.

Radio button
A button on a form that selects an option, the radio buttons that make a field are mutually exclusive (now known as an option button).

Recall
Return a laid-off employee to active status, usually with no affect to benefits.

Reciprocal taxation
Reciprocal tax withholding refers to agreements made between US states and (or) localities regarding income tax calculation and reporting for compensation paid to an employee who lives in one state or locality and works in another.

Record
A complete set of fields, such as the fields that make up a tax form or a name and address record.

Alternate definition: To set down for preservation in writing or other permanent form.

Recruitment
Process of finding and hiring new employees who meet the needs of your organization.

Recycle File
P05IN; A file that contains employee data and pay document information required for payment reconciliation. It also contains time entries to be processed and paid at a later date. This file is used to pass data to the next payroll or maintenance run.

Registration
Registration is the act of enrolling an employee in a class.

Registration number
A three-digit registration number is assigned to employees for tracking purposes when they register for a training class. This enables the order in which the employees registered to be viewed.

Rehire
The process of hiring a former employee of your organization. Typically, a break in service is incurred and benefits must start over (usually requiring a new adjusted seniority date if used in benefits tracking).

Reimbursement account
The account into which employee's travel and other expense type reimbursement checks are directly deposited.

Reinstatement
The process of returning a former employee to active status within a certain time period (such as 90 days), thus qualifying the employee to have certain benefits restored to the original hire date.

Reject time
The point at which an error condition will occur. An error condition must be manually corrected/approved and approved before a time entry can be generated by the system.

Relocation
The process of moving an employee from one organization to another geographic location, whether the move be domestic or international. This process also applies to applicants who are being relocated as part of the hire process.

Remaining net pay

The 'bucket' of money that is left after all employee deductions and taxes have been taken from the employee's gross pay. This 'bucket' of money can then be used for multiple deposits if the enterprise sets up multiple deposit HEDs.

Replication

The automatic process of writing changes made in the Employee Database and option lists and tables in the System Control Repository to the Replication Holding File (FILE08).

Replication Application

English Language program (DSAPLY) that reads records from the Replication Packet File (FILE20) produced by the Replication Reception program (DSRECV) and updates the System Control Repository and Employee Database accordingly.

Replication Distribution

Two COBOL programs that work together to distribute and receive updates. The Replication Distribution Program (DSTRIB reads either the Replication Holding File (FILE08) or a Replication Packet File (FILE20), selects data applicable to a specific DL and writes all necessary data to a new output-only Replication Packet File (FILE21). The resulting FILE21 will be processed on the remote DL via the DSRECV Replication Reception program.

Replication Holding File

FILE08. This file contains additions, changes, and deletions to the System Control and the Employee Database. Data is distributed from and written to this file, based on the data distribution rules configured for the target DL by the source DL.

Replication Packet File

(FILE21/20). This file contains data changes and is created specifically to update a target DL. This information may include Company/Employee data, tables and option lists, and time entry and adjustment records.

Report

The term report refers to a report produced on paper.

Report Generator

A program that produces the batch payroll and the batch payroll reports.

Report Group

A series of packaged reports that are created using the Report Group Activities form and are run together.

Report Group Scheduler

This is the program that allows you to schedule reports. This was formerly known as the Report Scheduler.

Report parameters

Specific guidelines for determining the information to be processed by a given report or program.

Requisition

A formal request to fill a vacancy or vacancies.

Requisition candidate

A candidate for a vacancy represented on a requisition.

Requisition limit

A total unit value of a requisition.

Requisition unit

The value of a requisition expressed as an FTE, hours, salary or headcount.

Retirement

Occurs when an employee retires from the organization.

Return

The activity of an employee returning as an employee to active status, usually following a leave of absence.

Alternative definition: key on keyboard used to perform a carriage return, can also be known as Enter.

Review process

A method used by an organization to evaluate an employee's salary or performance in a standard, timely manner.

Roll-up reporting

Option that enables packaged reports to be processed within organizations (roll-up).

Rotation pattern

A way of describing the working pattern for a group of employees (crew) who regularly work different shifts.

A crew is a group of employees who together regularly work the same schedules according to a rotation pattern.

Safety standards
Legally-mandated workplace safety standards.

Salary budget record
Defines, for each employee, the budgeted increase amount, percentage, and effective date for a specific salary plan year, and the prorated effect of this increase on the budget in terms of amounts and percentages for each employee.

Salary grade
A range of salary amounts associated with a particular job.

Salary grade range
A range of salary amounts associated with the salary grade for a particular job.

Salary plan
A set of rules or guidelines used to budget for salary increases for the coming year.

Salary plan year
A 12-month period over which a salary plan is effective.

Salary range
The span of salary amounts from the minimum to the maximum of the employee salary grade.

Salary review
A periodic evaluation of an employee's compensation.

Salary review authorization form
Hard copy format of the employee criteria necessary to review and approve proposed salary increases.

SAT file
The Solution Series form appearance table. Simple text file that reflects the form's layout.

Save Changes
Saves the page (form) the user completed. (When you click 'Save Changes', eCyborg Interactive Workforce saves the information on the page whether or not the user made changes.)

Schedule Activities table
Identifies activity types for each point in a work day where the process of clocking in and out should be dealt with. Each Schedule activity also contains time parameters that will be used to calculate whether an employee will be docked or credited time.

Schedule assignments
Also referred to as a schedule. This term refers to the details of the Schedule Master tables to which an employee is assigned. These details include the date the assignment took place, the Schedule Number and Sub-Schedule Number, and (if applicable), the crew to which the employee is assigned.

Schedule error
Occurs when a clock transaction (ring) time falls outside of an employee's schedule reject times.

Schedule Master table
Used to set up your organization's Time and attendance rules (such as HEDs and the minimum number of hours an employee must work before a meal deduction is made). A Schedule Master table is associated with a Calendar Routine, earnings Code, and Shift Premium table by entering the appropriate identifier.

Schedule number
A unique three-character alphanumeric identifier used to partially identify a schedule table.

Screen
Now known as a form.

Scroll bar
When information on a page takes up more than one screen of your monitor, the system adds scroll bars to the right side of the screen. On the scroll bar:

- Click the up arrow to move line by line to the top of the page
- Click the down arrow to move line by line to move to the bottom of the page
- Click the double arrows to move several lines up or down the page

Click and drag the bar in the scroll area to manually move up or down the page.

Search argument
The value from an employee's master record used to search benefits tables to apply plan rules to specific groups of employees.

Search type
The definition of a field from an employee's master record to use as the search argument.

Secondary account(s)
Additional account or accounts at financial institutions that employees set up in eCyborg Interactive Workforce receive a portion of their pay. A primary account must be defined before an employee can set up additional accounts.

Security Officer
The assigned employee who is responsible for the setting up and monitoring of the security your Cyborg system.

Self-adjusting taxes
Taxes for which the system automatically recalculates the tax on a cumulative year-to-date basis on each payroll run.

In the U. S. these include FICA taxes: Social Security (tax record 101) and Medicare (tax record 103). The purpose of this calculation is to avoid any differences (of pennies) in FICA tax paid versus FICA tax due at year-end due to rounding on a pay period basis. In addition, certain state disability taxes and employee-paid state unemployment insurance taxes also self-adjust.

Sequential Master File
P20IN; The batch processing version of the Employee Database. This file contains organization and employee data, tax tables, and the object code for programs.

Service interruption
A period of time during which an employee did not maintain an active working status in the organization.

Service method
A calculation option list that determines the method for calculating credited service.

Session
When users log onto a software application, they begin a session. When they log off, they end the session.

Alternate definition: The period of time during which a class is held.

Shift
An employee schedule assignment for a given day. For a rotation pattern, this is a Sub-Schedule Number.

Alternative definition: key on keyboard, typically used to describe key combinations for a shortcut key.

Shift premium
A premium (or differential) added to an employee's regular earnings, overtime earnings, or both. It is represented by a shift code or HED Number.

Shortcut menu
A menu that appears when you right-click within The Solution Series 4. This menu contains context-sensitive commands and options that relate to the object (form, Navigator, and so on) on which you have clicked.

Sick days
The time off that an employee is allowed to take due to illness as a result of an employment contract or organizational policy.

Solution View
An online utility that provides the tools for creating new forms, fields, and report programs without the direct use of Cyborg Scripting Language.

Source DL
The node that owns the data being distributed. Depending on the rules established, the same DL can alternate from source to target.

Special assessment
Extraordinary or temporary taxes, such as additional employer-paid or employee-paid contributions to state unemployment programs or to mandatory health insurance programs.

Spinbox
A control on the interface composed of a text box and increment and decrement buttons that allow you to adjust a value from a limited range of possible values.

Spreadsheet application
Software for recording ledger entries, creating worksheets, graphing data, and other accounting functions.

Standalone Time and Attendance
Customers who are using the Cyborg's Time and Attendance Administration but not the Cyborg's Payroll Administration.

Static data
Includes organization and employee information, such as name and salary.

Static SQL
Data Definition Language (DDL) and Data Manipulation Language (DML) statements embedded in application programs.

Status bar
The bar that appears at the bottom of The Solution Series window. The Status Bar displays useful information, such as your current session number, the currently displayed organization and employee, and so forth.

Statutory employee
Any of the four categories of workers who are independent contractors under common law and are treated by statute as employees. These include:
(1) a driver who distributes beverages (other than milk) or meat, vegetables, fruits, or bakery products; or who picks up or delivers laundry or dry cleaning, if the driver is your agent or is paid by commission.
(2) certain types of full-time insurance sales reps
(3) an individual who works at home on materials supplied by you that must be returned to you
(4) certain full-time traveling or city salespeople.

Social Security and Medicare (FICA) taxes may or may not be withheld. Income taxes are not withheld from a statutory employee. A statutory employee will receive a W-2 with the ‘Statutory Employee’ box checked.

Sub-schedule number
A two-digit numeric text box used to further identify a schedule table.

Succession planning
Finding and developing employees for placement into identified key positions that are expected to become vacant sometime in the future.

Summary page
To help you see information at a glance, eCyborg Interactive Workforce uses summary pages. The summary page displays a short view of detailed information. For example, all your emergency contacts appear on a summary page. You delete the contact or proceed to the detail for the contact from the summary page.

Summary plan
A customer-owned description of a benefits plan.

Supplemental wages
Wages that are separate from regular earnings may be classified as supplemental wages and taxed using the default method. The default method means using a set percentage specified by the tax authority. Examples of such earnings are bonuses and commissions.

Surplus
A 'surplus' is an exceeded complement position.

System administrator
An individual responsible for maintaining a multi-user computer system, including a local-area network (LAN). Typical duties include:

- Adding and configuring new workstations
- Setting up user accounts
- Installing system-wide software
- Performing procedures to prevent the spread of viruses
- Allocating mass storage space

System Control Repository
This is the file that contains system definitions for The Solution Series*,* (FILE01).This was formerly known as the Control File.

System Generator
A type of Report Generator that performs system functions, such as defining data elements and system messages.

Table
Contains an organization's rules and policies and controls what actions take place at the employee level.

Alternative definition: means of displaying information in columns and rows.

Table Definition Record
Table containing data about the Position Administration table records, including the location of keys to associated tables.

Target DL
The node that receives the data being distributed. Depending on the rules established, the same DL can alternate from target to source.

Task
The lowest level of organization on the Navigator or menu, generally equivalent to a form. checklist, or dialog.

Task icon
An icon denoting a task. Task icons describe the type of task, including Forms, Checklists, Dialogs and others.

Tax authority
A government agency to which an employer and employee has statutory tax obligations. The tax authorities for which you handle taxes exist at the federal, state/province, and local levels.

Tax Authority File
A Cyborg-supplied file that contains all the tax-specific information needed to calculate taxes for tax authorities. This includes wage-bracket tables for different marital statuses and information relating to allowances and standard deductions. The sources for the contents of this file are tax specifications published by the various tax authorities.

Tax code
The three-character to seven-character Cyborg-supplied reference code that identifies a tax and that serves as the link between the Tax Specification Record and the employee tax record.

Tax Maintenance File
One of the two Cyborg-supplied tax files. A Tax Maintenance File is a file issued by Cyborg in conjunction with a Tax Update Bulletin (TUB). It contains all the tax specifications that are being updated in the bulletin, in the form of tax specification transactions. These transactions are typically used as input to the batch maintenance run in which tax updates are applied.

Tax specification
Each tax authority publishes tax specification information that specifies how each tax must be administered. This information specifies how employers should calculate taxes and how taxes should be withheld from employees (if withholding applies). The tax specifications can be in the form of tax formulas and (or) tax tables.

Tax Specification record
A record on your Employee Database that contains the tax specifications for a tax. The record contains all the information, as obtained from the governmental authority, needed to calculate tax amounts for the tax. The record may contain more than one tax; for example, US state Tax Specification records contain information for both state income tax and state unemployment insurance. Once a Tax Specification record is activated, tax specification information from the Cyborg-supplied tax files can be loaded onto the record on your Employee Database.

Tax table
A set of information required to calculate a tax, for a specific set of employee parameters. Tax tables are stored and maintained in Tax Specification records. A table typically includes wage and bracket information and data relating to allowances, such as personal exemptions and to standard deductions. There can be several tables relating to marital and resident status in a given Tax Specification record.

Tax type
This term refers to various categories of taxes, for example, income, National Insurance, unemployment, disability, Social Security (FICA-OASDI), and Medicare (FICA-HI).

Taxability
The term refers to whether an hours, earnings, and deductions amount is to be included in taxable wages to be accumulated for a specific tax. If the hours, earnings, and deductions amount is excludable, then the amount is not included in taxable wages. If the hours, earnings, and deductions amount is taxable, then the amount is included in taxable wages. The term fully excludable or fully taxable implies that more than one type of tax is being referenced, for example, state income tax and state unemployment insurance in the US.

Taxable wage base
The taxable wage base represents the maximum amount of an employee's wages on which tax is levied and after which there is no liability. A wage base in the US

typically is in effect for FICA, unemployment taxes, and disability.

Tax-related Regulatory Bulletin
A TUB contains the updates to tax specifications supplied by Cyborg, consisting of a bulletin document, a tax file that contains the updated tax specifications, and a printed listing of tax specification transactions with the updates.

TDR
Table Definition Record.

Template
A basis from which to create a custom item. For example, you can use an existing Cyborg report as a template for your custom report.

Temporary password
A set of alphanumeric characters used with a user ID to limit access to a software application. The system requires that users replace their temporary password with a user-defined password within a certain number of days.

Termination
The activity of an employee no longer being employed by the organization.

Test environment
A separate organization or system partition used only for testing.

Text box
A control on the interface in which text can be entered and edited (formerly known as a field).

Text qualifier
The character surrounding an item between delimiters. All values between the qualifier are data items and are not scanned for a delimiter. This allows a delimiter character, such as a comma, to be a valid data item. Example:

"item 1","item 2","item 3, 4 and 5"

This string contains three data items:

Item 1

Item 2

Item 3, 4 and 5

Although the third item contains a comma, it is ignored as a delimiter because it is between the text qualifier of speech/quotation marks (").

Time entry
The form in which you enter the hours worked for an employee. This was formerly known as a Time Card.

Time entry extract file
A file of time entries external to the Time and Attendance Solution that is used to feed to payroll.

Time entry validation
The Time Entry Validation/Creation program identifies and assigns an activity, for example Clock In (1), to each clock transaction (ring) when performing the validation function. Each clock transaction must be assigned to an activity, in order for time entry hours to be calculated for an employee, for a particular shift. This program validates clock transactions (rings) and generates time entries.

Timeout
The period of time that elapses before a user's eCyborg Interactive Workforce account becomes invalid because of inactivity.

ToolTip
A standard Windows control that provides a small pop-up window that provides descriptive text, such as a label, for a control or graphic object.

Top-down appraisal
Appraisal made by a supervisor or manager of an employee's capabilities. Such an appraisal is generally based on the supervisor's or manager's day-to-day observation of an employee's work performance and will usually include an appraisal interview with the employee.

Trainer
Trainers are set up on the Provider Index Form. They are instructional institutions, organizations or persons who are available to teach a training class.

Trainer code
The trainer code is a four-character value that represents a trainer. This value resides in Option List TR38.

Training area
The training area is recorded on the Class Schedule Form. It is typically defined as the section of the organization to which the training applies, such as manufacturing.

Training class results
These are the class details and absence information recorded on the Process Class Results form. Details recorded include the objectives met when taking a training class.

Training class status
The status value is updated and displayed on the Class Schedule Form. It tracks whether the training class is canceled, full or available.

Training course code
The training course code is a six-character value that represents a training course. This value resides in Option List TR33 and is associated with a course title.

Training plan
A plan of training courses that an employee will attend in the future to achieve the necessary skills to perform a job.

Training reason
The reason for training is used to identify why a training request has been made. For example, the purpose of the training to act as a refresher, to acquire new skills, and so forth.

Training request
A training request is a request for an employee to attend a specific course or class. A formal request for training is not essential. This step could be omitted and the employee could be registered directly in the course of his or her choice.

Transfer
Process of moving an employee from one organization to another organization, such as moving an applicant from the applicant organization to the active employee organization.

Alternative definition: to move data or files from one computer to another

Trend analysis
Reporting or statistics that indicate the rate of change in costs and other elements of a benefits plan.

Trigger
A set of conditions that must occur for an email or letter communication event to start. This can involve the creation, deletion, or modification of forms or checklists within the system.

Tuition reimbursement
Remuneration made to employees for tuition expenses.

Type of training request
The type of training request indicated whether the employee was required to attend the training or whether he or she asked to attend the training.

Unauthorized absence
Absences that are generally not considered paid time away from regularly scheduled work.

Underlined text
In browser applications, text that provides a link to another screen or page.

Unemployment insurance tax
A tax required by some US states to be funded by employee-paid contributions to pay all or part of the cost of unemployment insurance coverage. On the Payroll Solution, state unemployment insurance tax records are established as Type 2 taxes.

Unpaid absence
Employee absence that will not be paid by the organization. A time entry will not be created for this absence.

Upward appraisal
Appraisal that calls for evaluations by those who work under the direction of the employee being evaluated.

URL
Acronym for uniform resource locator. A standard way of specifying the location of an object, typically a web page, on the Internet. URLs are the form of address used on the World-Wide Web. They are used in HTML documents to specify the target of a hyperlink which is often another HTML document (possibly stored on another computer).

User class
Cognos Impromptu assigns security according to configured user profiles. These security profiles are configured by your Impromptu administrator.

User code
A set of characters (up to eighteen alphanumeric characters) that, along with the password, identify the user to the system as a valid user user when they log on.

The user code is case-sensitive (upper case, lower case) and must be entered using the correct case.

User defined password
A set of alphanumeric characters created by users that allows them to view and update information in a software application.

User ID
A set of characters that identify you to the software application. The application contains a list of authorized users by user ID. When you attempt to log on, the system checks the list of authorized users to determine whether you have authority to use the application.

User profile
Used for security purposes to determine what you can and cannot do while you are using the system, and which parts of the system you can access. A user profile is created and maintained for you by a Security Officer. Each user of the system will have a user profile.

Vacancy
An open position that needs to be filled, or an unfilled complement position

Vacation days
The time off that an employee is entitled to as a result of an employment contract or due to length of service.

Validation
The process where the Time Entry Validation program identifies and assigns an activity to a clock transaction (ring) when performing the validation function.

Variant forms
Method of displaying country-specific variation of Cyborg-delivered forms.

Waive
The act of choosing not to enroll in an optional benefits plan.

Warning time
Used to set a period of time after which an employee will appear on the exception report for a particular activity. A Warning condition will allow the creation of a time entry. A Reject condition will not. This is part of the Time and Attendance Administration.

Welfare benefit plan group
First level of the logical organization of welfare benefit plans in eCyborg Interactive Workforce.

Welfare benefit plan subgroup
Second level of the logical organization of welfare benefit plans in eCyborg Interactive Workforce.

Welfare plan
Any insurance or other benefit plan that provides immediate benefits to a participant—for example, medical insurance.

What-if mode
Method for processing a report that allows viewing of information without updating of employee records.

Window
A standard Windows object that displays information. A window is a separately controllable area of the form that typically has a rectangular border.

Wizard
A form if user assistance that automates a task through a dialog with the user.

Work area
The Solution Series screen. It includes the menus, toolbars, Navigator, forms area, message area, and status bar.

Work instructions
Specific tasks to be completed during the migration of data and files from test to production.

Work restrictions
Restrictions that prevent an employee from participating in specific workplace functions.

Worker's compensation
Legislation in the US that provides compensation to employees who suffer work-related injuries.

Workforce competency
The capacity of the overall workforce to perform required functions and sets of activities.

XHTML
Extensible HyperText Markup Language, used by the help pages for eCyborg.

Year End Master File
P20OUT file from the final payroll run of the year

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Using Training Administration

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Disclaimer

This document relates to the current published version of the product. Every effort has been made to supply complete and accurate information. However, all information found herein is subject to change without notice and Cyborg Systems, Inc. shall not be held accountable for any subsequent changes or modifications made to the contents of this document.

All information contained herein is as accurate as is humanly possible. If any statement is unclear, please contact Customer Support for clarification. No statement is intended to be vague or misleading.

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Contents

P A R T 1

Introduction

In This Section

CHAPTER 1

About This Manual

Welcome

In response to the growing need for detailed employee training record keeping, Cyborg Systems, Inc. provides Training Administration, a practical addition to the system. Our approach has been to supplement the Human Resources Administration data with a flexible and easy-to-use system to record and analyze training information.

Training Administration is designed to aid organizations in the administration of employee training classes. Its features provide administrative support and allow for detailed record keeping of employee training history, class results, and skills/competencies acquired during training.

This manual has been designed as a reference document. It is also used in classroom training. You will find sufficient detail for self-study, before and after classroom training.

Who should use this manual?

This manual is intended for users who already have a working knowledge of Cyborg's products. The following users will find it most useful:

- Data Managers
  Data Managers will find it helpful to read Parts 1 and 2 of this manual for an overview of Training Administration and the steps that are necessary to implement it.

- End Users
  End users and data-entry personnel will find detailed directions throughout the manual outlining the specific steps necessary to carry out various tasks.

Prerequisite skills

Users of this manual should possess a variety of technical skills, depending on the roles they will play. At a minimum, all users should have:

- Basic understanding of Microsoft Windows
- Attended training or have experience using Cyborg's products (the eCyborg: Using the Web Client or Using The Solution Series: Administrative Solutions training class is recommended).

Additional documentation and training courses

The following documentation and training courses are available from Cyborg Systems:

Documentation

Document	Description
eCyborg: Using the Web Client or Using The Solution Series: Administrative Solutions	This prerequisite course documentation covers the introductory concepts and tasks related to Cyborg's administrative solutions. It describes how to navigate through the software and explains the important concepts and functionality of the system.

If you do not have a copy of this document, you can obtain one from Customer Support.

Training Courses

Related Course	Description
eCyborg: Using the Web Client or Using The Solution Series: Administrative Solutions	This prerequisite course covers the introductory concepts and tasks related to your specific implementation of Cyborg's administration solutions.

If you wish to attend any of these courses, contact Customer Support or visit our website www.Cyborg.com for details of course dates and availability.

How this manual is organized

This manual has been organized to make it as easy to use as possible. The chapters are grouped accordingly into the following parts:

Part	Chapters	Description
1. Introducing Training Administration	1–2	These chapters provide an overview of the system and explain its interaction with other system components.
2. Setting Up Training Administration	3–6	These chapters explain the key concepts and detailed directions required to implement Training Administration.
3. Entering Employee Training Data	7–9	These chapters explain the key concepts and detailed directions required to establish employee training information.

Part	Chapters	Description
4. Processing Training Results	10–11	These chapters explain the key concepts and detailed directions required to process training results and evaluations and analyze training costs.
5. Appendices	A–B	Appendix A is a quick reference to Training Administration reports. Appendix B provides feedback on the practice and review at the end of each instructional chapter.

Following are descriptions of the chapters within the parts.

Part 1: Introduction

The chapters in Part 1 describe this manual and provide an overview of the features of Training Administration, and its interaction with other Human Resource and payroll components:

Read this chapter		To learn about
1	Introduction	How this manual is organized and how to make the most of using it
2	Overview of Training Administration	A high-level overview of Training Administration, including an introduction to its important features

Part 2: Setting Up Training Administration

The chapters in Part 2 explain the implementation and setup tasks that must be completed before you can begin using Training Administration:

Read this chapter		To learn about
3	Implementing Training Administration	How to implement Training Administration
4	Setting Up and Maintaining Training Courses	How to establish, maintain, and delete training courses
5	Setting Up and Maintaining Training Classes	How to establish, maintain, and review training class information
6	Setting Up and Maintaining Training Programs	How to set up, maintain, and delete training programs

Part 3: Entering Employee Training Data

The chapters in Part 3 explain how to enter the employee-level information for courses, classes, and programs:

Read this chapter		To learn about
7	Requesting Training for an Employee	How to identify the best course for an employee, check prerequisites, and request employee training
8	Registering an Employee for Training	How to check class availability, register an employee for a class, and confirm registrations
9	Canceling Registrations	How to cancel an employee class registration and program registration

Part 4: Processing Training Results

The chapters in Part 4 explain how to record and analyze training results and costs:

Read this chapter		To learn about
10	Processing Training Results and Evaluations	How to record, review, and analyze training results and evaluations
11	Completing and Analyzing Training Costs	How to establish employee costs and view course, class, and employee costs

Part 5: Appendices

The appendices in Part 5 contain the following quick reference information and review answers.

Read this appendix		To learn about
A	Report Quick Reference	A quick reference to Training Administration reports and their business uses
B	Practice and Review Answers	Detailed answers to the practices at the end of the chapters

How to use this manual

This manual has been designed as a reference manual as well as a training manual. It has been written to facilitate self-study before and after classroom training.

Table of contents

The manual has been carefully designed for ease of use. All our manuals are written to be task oriented to help you complete your business tasks using our software.

The table of contents lists all the tasks and their respective chapters.

Glossary of Terms

A Glossary of Terms section is provided to explain terms used in the documentation.

Index

An index is provided to help you locate specific information.

This document was designed to reduce your need for an index. You should find the table of contents sufficient.

Introductory chapters

It is important that you read the introductory chapters first. Chapter 1 ensures you get the most out of the information we have provided. Chapter 2 provides a high level overview. Read it to get the big picture before reading the detailed instructional chapters.

Instructional chapters

All chapters, other than the introductory chapters, are instructional chapters. They contain detailed instructions on how to complete the business tasks. Each instructional chapter has the following distinct sections:

Key Concepts

Always read the conceptual information first. This will help you understand why you have to perform certain tasks. It will also help you make decisions about your options and help you understand the importance of performing certain tasks. Exercises to help you apply the concept to a business task are included at the end of most concepts.

Apply the Concept

To be certain that you have understood the key concepts in a chapter, complete the Apply the Concept exercises provided. The answers to these exercises can be found in the appendices.

Detailed Directions

When you are ready to perform a task, review the Detailed Directions, which provide guidance, as well as the specific steps, to complete a task.

Guided Practice

The Guided Practice within the Detailed Directions offers you an opportunity to practice a task with step-by-step instructions. It takes you through the various steps, providing detailed examples so you can gain a comfort level with the task. Guided Practice is easy to locate.

For practice, type 'ABC Solutions'.

Note: *To successfully follow the Guided Practice, you must have completed all the previous Guided Practice exercises in the manual. The Guided Practice uses the test data installed with our software. For the Guided Practice exercises to work, this test data must not have been altered.*

All users who complete the Guided Practice must either have their own copies of the test data or have the test data restored for them.

Extended Practice

To be certain that you have understood the tasks in a chapter, complete the Extended Practice provided. The Extended Practice gives you the opportunity to complete one or more tasks without step-by-step guidance. The answers to these exercises can be found in the appendices.

Note: *To be able to complete the Extended Practice exercises in the manual, you must have completed all the previous exercises. You must also be using the test data delivered with the software. This test data must not have been altered.*

Review of Questions Answered

To be certain that you have understood all of the information in a chapter, complete the review questions provided at the end of a chapter. The answers to these questions can be found in the appendices.

Conventions used in this manual

The underlying page layout and design of this manual are meant to be as intuitive as possible for you. Our intent is to make it easy to navigate through the manual and concentrate on learning and doing.

Cross-references

Wherever appropriate, we provide cross-references to help you find additional information or further discussion of a specific topic.

☞ *Refer to a cross-reference to find more detail or more discussion on a given topic.*

Notes

Whenever there is important information you should be aware of, we provide a note.

Note: *You will find tips or quick techniques covered in notes.*

How to get additional help

If you can not find the answers to your questions in this manual, contact Customer Support, who will be able to answer specific questions and give you general advice on training.

Please visit our web site ***www.Cyborg.com*** (see "Cyborg Home - http://www.Cyborg.com") for the latest schedule of available courses and course descriptions.

Suggestions and feedback

We value your feedback on our performance support materials. Please forward any comments on this manual to Customer Support.

C HAPTER 2

Overview of Training Administration

In This Chapter

Introduction

This section provides an overview of Training Administration and the features it offers. It also provides a suggested list of steps for setting up internal and external training classes.

What is Training Administration?

Training Administration is an easy-to-use system designed to aid organizations in the administration of employee training classes. Training Administration features provide administrative support and allow for detailed record keeping of employee training history, class results, and skills/competencies acquired during training.

Training Administration provides a variety of query (online) reports to display accurate class and employee information. It also provides several batch reports to help you make decisions about employee training plans and class development.

Why use Training Administration?

Training Administration should be used if your organization needs to maintain greater control of, and more extensive record keeping for, employee training.

Keeping your administration requirements in mind, you can perform the following functions with system-provided facilities:

- Define courses
- Schedule classes (a course given on a certain date, at a specified location)
- Set up programs (a series of classes that the student must complete)
- View and analyze class results and costs

Training Administration features

The main features of Training Administration include the following:

- Course/Class/Program Setup
- Student Registration/Cancellation
- Training Required/Training History
- Class/Program Administration
- Cost Analysis/Charge Back
- Management Tools

These features are described in more detail on the next pages.

Course/Class/Program Setup

In Training Administration you set up your training courses with basic course information, including effective date, objectives, skills, costs, and prerequisites. Course information is dated, allowing you to keep track of any changes to the course over time. A Course Copy facility copies course information to a new date and eliminates the need to retype common course data.

A class is a course given on a specific date(s) at a specific location. When a class is scheduled, it assumes the attributes of the course, although you can override some data (such as minimum and maximum class size) at the class table level. Additional class details are recorded, including class times and locations.

A program is set up as a series of training classes. An employee must complete all the classes in the series to complete the program.

Details about providers (trainers) and class coordinators can also be defined and then recorded at the class level.

Student Registration/Cancellation

After scheduling classes in the system, you can register employees for the classes and cancel their registrations. The system automatically keeps track of the number of students registered and will not process a registration if the class is full. Students can then be wait-listed or enrolled in another class.

Employees can also be registered in, or canceled from, programs. An employee is registered in every class in the program that has seats available; otherwise, the employee is wait-listed for any classes that are full.

The system generates confirmation letters, class cancellation letters, and reminder notices to send to registered employees.

Training Required/Training History

Training is a very important part of an employee's development. Knowing this, Training Administration is designed to record when training is required for an employee, and it uses this data to alert you that there are potential future students for a class.

Once the class has been completed, class results can be recorded. Recognizing that this can be a laborious task for an administrator who must input many class results, an automatic process that scrolls from one employee to the next is included. A history of past training and class results is kept on file for analysis and reporting purposes.

Class/Program Administration

Before a class is held, an administrator typically has many tasks to perform, including sending students notices confirming class registration, monitoring class registrations to determine if another class should be scheduled, and producing class reminders before the class starts.

After the class is held, a separate set of tasks must be performed, including processing evaluations and results.

Cost Analysis/Charge Back

Costs can be defined at the course level, class level, and employee level. Employee costs might be recorded at the course or class level if they apply to every student who takes the class. Costs are differentiated by a Category that defines whether the cost is considered an operating, equipment, participant, or individual cost. To allow you to analyze the different types of costs, the system includes forms and reports that accumulate all the appropriate costs. You can then analyze total class costs and total employee costs.

Management Tools

Many organizations look at training as the means by which they develop their employees to meet the organization's short- or long-term staffing needs. Organizations must decide which courses to provide and when to schedule a class. This decision is usually based on the number of employees who need a certain type of training and when these employees are available.

Training Administration features help you make informed decisions about department staffing, scheduling employees for training, deciding whether new courses or classes need to be added, and so forth. A combination of queries and reports supports this need for information.

Interaction with other system components

In some cases, Training Administration can interact with other system components to provide additional information for decision making or calculations.

Skills and competencies

If you use the skills and competencies information in Training Administration, these values automatically populate the Skills and Competencies form (33-SCR) for students once the class has been successfully completed.

Optionally, if you do not use the skills and competencies information in Training Administration, you may manually record skills and competencies attained through the employee's training program on the Skills And Competencies form (33-SCR). This serves as a supplement to Training Administration's management tools and provides decision-making information regarding department staffing requirements.

Salary Information

The salary expense amount can be included in the total employee costs for a training class. Salary expense is calculated automatically.

The salary amount can be automatically calculated on a Training Administration form using information on the Salary Assignment/Changes form (40-SCR). The number of class hours is multiplied by the employee's hourly rate and the resulting expense amount is displayed in Display mode.

The salary expense amount can also be automatically calculated using HED 001 (Regular Pay) as displayed on the Employee Pay Rate Or Salary form (H1-SCR). The number of class hours is multiplied by the employee's hourly rate and the result is shown in Display mode.

Control Numbers

In Training Administration, the Control Number is two alphanumeric characters. Control Numbers are handled differently in Training Administration as compared with other system tables. Rather than displaying the Control Number as a text box in the body of each table form, the system automatically generates the Control Number from the entry on the Organization-To-Rules Cross-Reference For HR form (AX-SCR) and displays it in the form heading.

Navigator structures

In a graphical User Interface (GUI) version of the system, Training Administration features can be found in the Navigator under the Training Administration component icon.

How to get started - internal classes

This section describes 12 steps to help you start using Training Administration features for internal classes. Three additional steps are provided for optional use. For more information, refer to the documentation for the forms and reports.

1. (Required) Set up Control Number(s) on the Organization-To-Rules Cross-Reference For HR form (AX-SCR).
2. (Required) Set up the Training Administration option lists. There are 38 delivered sample option lists. Review each sample option list and set up production option lists to meet your requirements. Be sure to set up your courses in the Course Codes option list (TR33).
3. (Required) Set up Course Directory forms (10RSCR) to establish your training courses.
4. (Optional) Set up training course coordinators on the Coordinator Index form (14RSCR).
5. (Optional) Set up training course providers (trainers) on the Provider Index form (19RSCR).
6. (Required) Schedule classes using the Class Schedule form (13RSCR).
7. (Required) Register employees into the scheduled classes using the Class Registration/Cancellation form (20RSCR).
8. (Required) Once a training class has been held, record class results using the Process Class Results form (22RSCR). Skills will be automatically updated if the employee passes the class.
9. (Optional) Record the results of class evaluations on the Process Class Evaluation Results form (23RSCR).
10. (Required) Use the Training Results/History form (30RSCR) to view employee training history.
11. (Optional) Use the Training Required form (33RSCR) to record or view training required for employees.
12. (Optional) Record employee-level training costs on the Employee Training Class Costs form (34RSCR).
13. (Optional) Set up a program of classes on the Program Schedule form (15RSCR).
14. (Optional) Register employees into programs using the Program Registration/ Cancellation form (16RSCR).
15. (Optional) Cancel, copy, or transfer classes using the Class Maintenance Facility form (18RSCR).

How to get started - external classes

This section describes six steps to help you start using the Training Administration features for external classes. For more information, Refer to the documentation for the forms and reports.

1. (Required) Set up Control Number(s) on the Organization-To-Rules Cross-Reference For HR form (AX-SCR).
2. (Required) Set up the Training Administration option lists. There are 38 delivered sample option lists. Review each sample option list and set up production option lists to meet your requirements. Be sure to set up your courses in the Course Codes option list (TR33).
3. (Optional) Set up Course Directory forms (10RSCR) to establish your training courses.
4. (Required) Record the training results data on the Training Results/History form (30RSCR) with External in the Location text box.
5. (Optional) Record employee-level training costs on the Employee Training Class Costs form (34RSCR).
6. (Optional) Record skills and competencies on the Skills And Competencies form (33-SCR).

PART 2

Setting Up Training Administration

In This Section

CHAPTER 3

Implementing Training Administration

In This Chapter

Introduction

Before using the features of Training Administration that are discussed later in this manual, it is necessary to complete some basic implementation tasks.

Tasks

This chapter explains the following implementation tasks:

- Setting up Control Numbers for all production organizations
- Setting up Training Administration option lists

Prerequisites

The following task must be completed before you begin to implement Training Administration:

Organization details

Before any implementation data can be entered, you must ensure that your organization details have been set up on the system.

Questions answered

The following questions are answered in this chapter:

1. How are Control Numbers set up in Training Administration?
2. How are Training Administration option lists set up?

Control Numbers

A Control Number is used to define which table records will be used for each of your organizations. The two-character Training Administration Control Number is defined on the Organization-To-Rules Cross-Reference For HR form (AX-SCR) .

For example, in the delivered Training Administration test data, Control Number '99' is used for organization '999999'.

See also:

- Setting up Control Numbers for all production organizations ***(on page 35)***

For detailed directions on setting up Control Numbers.

Apply the Concept
Describe the two primary differences between the Control Numbers used in Training Administration and those used in other system tables.

Uses of Training Administration option lists

Thirty-eight sample option lists are delivered with Training Administration. You should review and, where necessary, edit these option lists to reflect your organization's requirements.

Nine of the option lists should not be modified because Training Administration needs them to function properly. They are:

- Cost Category (TR14)
- Course Results (TR09)
- Course Status (TR11)
- Register List Option (TR37)
- Registration Options (TR34)
- Registration Status (TR16)
- Salary Costs Method (TR29)
- Session Maintenance (TR35)
- Training Required Status (TR15)

Course/Class option lists			**Evaluation option lists**	
Level Required	TR01		Evaluation Category	TR39
Course Type	TR02		Evaluation 1	TR17
Course Objectives	TR03		Evaluation 2	TR18
Course Location	TR05		Evaluation 3	TR19
Course Results	TR09*		Evaluation 4	TR20
Training Area	TR10		Evaluation 5	TR21
Course Status	TR11*		Evaluation 6	TR22
Training Location	TR13		Evaluation 7	TR23
Cost Category	TR14*		Evaluation 8	TR24
Course Subjects	TR30		Evaluation 9	TR25
Training Cost Type	TR31		Evaluation 10	TR26
Course Prerequisite	TR32			
Course Codes	TR33			
Provider/Coordinator option lists			**Additional option lists**	
Provider Type	TR07		Absence Reason	TR12
Provider Course Category	TR08		Training Required Status	TR15*
Coordinator Index	TR27		Registration Status	TR16*

Course/Class option lists			**Evaluation option lists**	
Provider Index	TR38		Training Required Reason	TR28
			Salary Costs Method	TR29*
			Registration Options	TR34*
			Session Maintenance	TR35*
			Training Elective	TR36
			Register List Option	TR37*
			Program Schedules	TR40

*This option list should not be modified.

A description of each option list follows. The option lists have been divided into the following categories: course/class option lists, provider/coordinator option lists, evaluation option lists, and additional option lists.

Course/Class option lists

Level Required (TR01)

This one-character alphanumeric value defines the level of difficulty of the training course subject matter.

Examples:

2 Advanced
4 Introductory
6 Intermediate

Course Type (TR02)

This two-character alphanumeric value defines the kind of training that applies to the training course.

Examples:

01 CBT
P2 Lecture

Course Objectives (TR03)

This three-character alphanumeric value defines the objectives to be met by attending the training course.

Examples:

POL Understand Policy
SKG Gain General Skills

Course Location (TR05)

This three-character alphanumeric value defines the location of a training class, such as a training center.

Examples:

CHI Chicago Training Center
SYD Sydney Training Center

Course Results (TR09) - (Do not delete or modify delivered options)

This one-character alphanumeric value defines the final result after an employee attends a training course.

Examples:

C Completed
F Failed
I Incomplete
P Passed

Training Area (TR10)

This two-character alphanumeric value defines the section or department responsible for the training.

Examples:

02 Sales and Marketing
03 Corporate Services

Course Status (TR11) - (Do not delete or modify delivered options)

This one-character alphanumeric value defines the current availability of the training course. These options are automatically generated and displayed on the Class Schedule form (13RSCR).

Examples:

A Available
C Canceled
F Full

Training Location (TR13)

This two-character alphanumeric value defines the general location of the training class.

Examples:

01 Chicago
UK London

Cost Category (TR14) - (Do not delete or modify delivered options)

This one-character alphanumeric value defines the kind of cost to be associated with the training course. The delivered options (listed below) are used in various packaged reports in Training Administration. If this option list is modified, the appropriate packaged reports must also be modified to recognize any customizations.

Examples:

E Equipment
H Per Head
I Individual
M Miscellaneous
O Operating
P Participant

Course Subjects (TR30)

This three-character alphanumeric value defines the subject of a training course.

Examples:

002Marketing Theory
M01 Management Skills

Training Cost Type (TR31)

This two-character alphanumeric value defines the specific items associated with the cost category for the training course (these examples could be associated with a category of Equipment).

Examples:

01 Overhead Projector
04 Large Monitor rental

Course Prerequisite (TR32)

This six-character alphanumeric value defines the prerequisites needed to register for a training course.

Examples:

MGMT01 1 Year Mgmt Experience

Course Codes (TR33)

This six-character alphanumeric value defines training course titles.

Examples:

111111 Human Resource Mgmt
222222 Position Management

Provider/Coordinator option lists

Provider Type (TR07)

This two-character alphanumeric value defines the source of the training provider, usually an employee or external provider.

Examples:

EMEmployee
EX External

Provider Course Category (TR08)

This two-character alphanumeric value defines the training courses a provider is qualified to teach.

Examples:

A1 All
01 HR Management

Coordinator Index (TR27)

This five-character alphanumeric value uniquely identifies the training course coordinator who administers the course. Sample options in the Coordinator Index option list provide titles such as 'Management Classes', meaning the Coordinator of Management Classes. Your descriptions may be titles or actual names.

Examples:

11111 HR Classes
22222 Orientation Sessions

Provider Index (TR38)

This 10-character alphanumeric value defines the training course provider. Sample options in the Provider Index option list (TR38) provide titles such as 'Chicago Staffed', meaning the trainer is based in Chicago. Your descriptions may be titles or actual names.

Examples:

1 Chicago Staffed
2 New Orleans Staffed

Evaluation option lists

Evaluation Category

This four-character alphanumeric value defines up to 10 categories for training class evaluations. The first two positions of the value are the Control Number and the last two positions are numbered 01 through 10. Match the Control Number here and on the Organization-To-Rules Cross-Reference For HR form (AX-SCR) for each organization. This allows different organizations to have different categories.

Note: *It is not possible to have different categories within the same organization.*

Examples:

9901—Instructor
9902—Subject Matter
9903—Class Facilities
9904—Refreshment Service
9905—Audio-Visual
9906—Class Materials
9907—Presentation Quality
9908—Class Effectiveness
9909—Met Objectives?

9910—Registration Process

Each of the options in this option list can be tied to its own option list, which allows custom rankings within a category. See below for the option lists that are tied to each of these options.

Evaluation 1 (TR17)

This one-character alphanumeric value is tied to the Evaluation Category option list (TR39) value 9901.

Examples:

1 Excellent
2 Very Good
3 Fair
4 Poor

Evaluation 2 (TR18)

This one-character alphanumeric value is tied to the Evaluation Category option list (TR39) value 9902.

See the ***Evaluation 1*** (see "Earned income credit" on page 349) option list for examples.

Evaluation 3 (TR19)

This one-character alphanumeric value is tied to the Evaluation Category option list (TR39) value 9903.

See the ***Evaluation 1*** (see "Earned income credit" on page 349) option list for examples.

Evaluation 4 (TR20)

This one-character alphanumeric value is tied to the Evaluation Category option list (TR39) value 9904.

See the ***Evaluation 1*** (see "Earned income credit" on page 349) option list for examples.

Evaluation 5 (TR21)

This one-character alphanumeric value is tied to the Evaluation Category option list (TR39) value 9905.

See the ***Evaluation 1*** (see "Earned income credit" on page 349) option list for examples.

Evaluation 6 (TR22)

This one-character alphanumeric value is tied to the Evaluation Category option list (TR39) value 9906.

See the ***Evaluation 1*** (see "Earned income credit" on page 349) option list for examples.

Evaluation 7 (TR23)

This one-character alphanumeric value is tied to the Evaluation Category option list (TR39) value 9907.

See the ***Evaluation 1*** (see "Earned income credit" on page 349) option list for examples.

Evaluation 8 (TR24)

This one-character alphanumeric value is tied to the Evaluation Category option list (TR39) value 9908.

See the ***Evaluation 1*** (see "Earned income credit" on page 349) option list for examples.

Evaluation 9 (TR25)

This one-character alphanumeric value is tied to the Evaluation Category option list (TR39) value 9909.

See the ***Evaluation 1*** (see "Earned income credit" on page 349) option list for examples.

Evaluation 10 (TR26)

This one-character alphanumeric value is tied to the Evaluation Category option list (TR39) value 9910.

See the ***Evaluation 1*** (see "Earned income credit" on page 349) option list for examples.

Additional option lists

Absence Reason (TR12)

This three-character alphanumeric value defines the reason for an employee's absence from a training class.

Examples:

002Death in Family
003Did not finish class

Training Required Status (TR15) - (Do not delete or modify delivered options)

This one-character alphanumeric value defines the reason the employee is required to attend a training class. These options are used to create the Training Required inquiry form (33RSCR). If options are added, the form logic may need changes or additions.

Examples:

C Employee Canceled
D Class Canceled
F Employee Failed
I Class Incomplete

Registration Status (TR16) - (Do not delete or modify delivered options)

This one-character alphanumeric value defines the status of an employee registration. These options are used to create the Training Required inquiry form (33RSCR).

Examples:

N No Status
R Registered
W Wait List

Training Required Reason (TR28)

This one-character alphanumeric value defines the reason training is required for the employee.

Examples:

T Training Plan

Salary Costs Method (TR29) - (Do not delete or modify delivered options)

This one-character alphanumeric value defines the method used to calculate the salary expense to be included in the employee's training class cost. These options are options used to calculate salary expense on the Employee Training Class Costs form (34RSCR).

Examples:

2 Use Salary Segment

Registration Options (TR34) - (Do not delete or modify delivered options)

This one-character alphanumeric value defines the training class registration options. These are the options generated by programs when creating/deleting segments.

Examples:

C Cancel Registration
D Delete Registration
R Register in Session

Session Maintenance (TR35) - (Do not delete or modify delivered options)

This one-character alphanumeric value defines class maintenance options. These are the options generated by programs when creating/deleting segments.

Examples:

C Cancel Class
D Delete Class
P Copy Class
T Transfer Class
Y Class Canceled

Training Elective (TR36)

This one-character alphanumeric value defines the training elective options.

Examples:

E Elective
R Required

Register List Option (TR37) - (Do not delete or modify delivered options)

This one-character alphanumeric value defines the listing employee options. These options are internally determined and sorted by the system. They become the values used for selecting employees for queries.

Examples:

8 List register/wait
R List registered
W List wait listed

Program Schedules (TR40)

This five-character alphanumeric value defines training program titles.

Example:

11111 HR Mgmt Program

See also:

- Setting up Training Administration option lists ***(on page 37)***

For detailed directions on setting up Training Administration option lists.

Apply the Concept

How many different types of Training Administration option lists are there? Give a few examples of each type.

Apply the Concept

If your organization has five separate organizations but the training function is administered centrally using all the same tables and so forth, what value(s) would be entered on each Organization-to-Rules Cross-Reference For HR form (AX-SCR) in the Training Admin text box?

Detailed Directions

This section provides detailed instructions for the tasks discussed in this chapter.

Tasks

Setting up Control Numbers for all production organizations

To set up the Training Administration Control Numbers for all of your production organizations, follow these steps:

1. Determine what organization/Control Number combinations you want to use

Determine your organization/Control Number strategy.

2. Access the Organization To Rules Cross-Reference For HR form (AX-SCR)

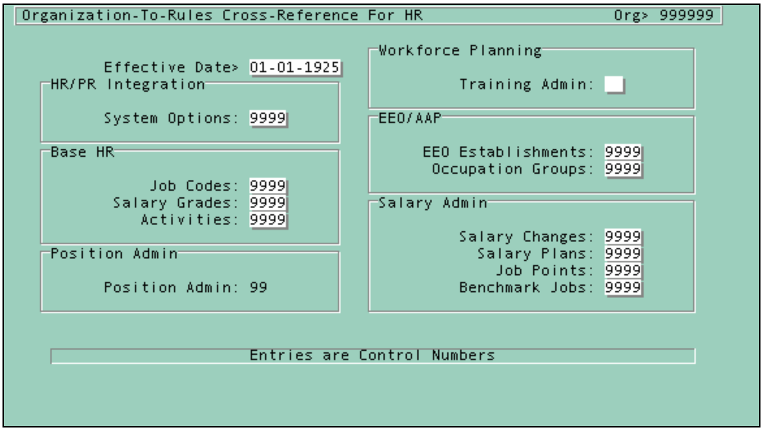
Make sure the appropriate organization is displayed in the status bar. This is the organization for which the Control Number is set up.

Access this form by making the following selection from the Navigator.

Component: HR Setup
Process: Setup HR Rules
Task: Organization To Rules Cross-Reference

For practice, access the Organization-To-Rules Cross-Reference For HR form (AX-SCR).

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



3. Enter the Training Administration Control Number

Type the two-character Training Administration Control Number in the Training Administration text box.

For practice, type '99' if the entry is not already present on the form.

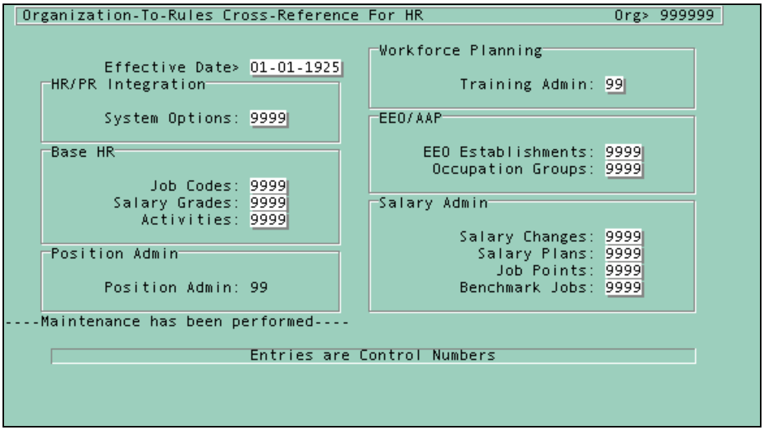
4. Click Save or press Enter

The Training Administration Control Number is set up for the organization displayed on the status bar and the following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



Be sure to perform these steps for each organization that will be using Training Administration.

See also:

- Control Numbers ***(on page 25)***

For an explanation of how Control Numbers are used.

Setting up Training Administration option lists

To set up the production option lists, follow these steps:

1. Determine options and descriptions for option lists

Review the option lists for values and descriptions you want to add (recall that some option lists should not be modified).

2. Access the Option List Editor (CSUPDT)

Access this form by making the following selection from the Navigator.

Component: Development Tools
Process: Option Lists
Task: Edit

For practice, access the Option List Editor (CSUPDT) dialog box.

3. Enter the Option List Name

Enter the name of the option list to be edited.

For practice, type 'TR33'.

4. Click the Find Now command button

The system displays the detailed information for the requested option list.

For practice, click the 'Find Now' command button.

5. Click the Create command button

A blank line will be inserted, allowing you to add the new code.

For practice, click the Create command button.

6. Enter the Code

Enter a unique code or value. The length of the code will depend on the particular option list with which you are working.

For practice, type 'SA0001'.

7. Enter the Description

Enter a description of up to 20 characters. This description will be displayed in the options provided by the list box.

For practice, type 'Salary Admin'.

8. Enter the Alternate Language

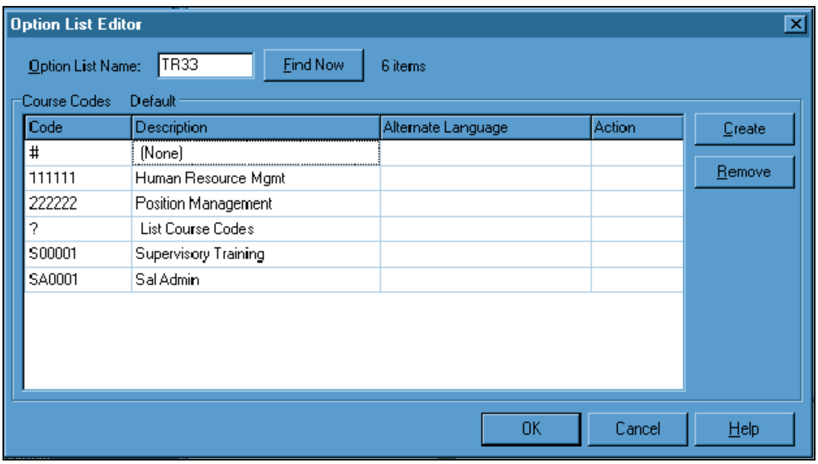
If an alternate language is being used, enter the description in that language.

For practice, leave this text box blank.

9. Click Save or press Enter

The Option List Editor dialog box is displayed with the description that has been added.

For practice, click Save or press Enter.



☞ *Be sure to perform these steps for all the Training Administration option lists that need customization.*

See also:

- Uses of Training Administration option lists ***(on page 26)***

For an explanation of Training Administration option lists.

Extended Practice

Add the following codes to the option lists below using the Option List Editor:

Option list	**Code**	**Description**
Provider Index (TR38)	CYBOR G	Cyborg Systems
Coordinator Index (TR27)	CYB	Cyborg Class Coord
Provider Course Category (TR39)	CY	All Cyborg Classes

Review of Questions Answered

1. How are Control Numbers set up in Training Administration?

2. How are Training Administration option lists set up?

CHAPTER 4

Setting Up and Maintaining Training Courses

In This Chapter

Introduction

To use Training Administration, you must set up the training courses that you want to administer. This task is essential because you can not schedule training classes and register your employees into them until you set up your courses. This is an initial setup task. There are, however, some ongoing main finance tasks as well.

Tasks

This section explains the following:

- Setting up training courses
- Entering course objectives (optional)
- Entering skills and competencies (optional)
- Entering course costs (optional)
- Entering course prerequisites (optional)
- Entering course development costs (optional)
- Changing course details
- Copying training courses (optional)
- Checking available courses
- Deleting courses
- Setting up training course coordinators (optional)
- Setting up training course providers (optional)

Prerequisites

Before you begin to enter course details, the following task must have been completed.

Training Administration implementation

Before any data are entered, you must ensure that all option lists are populated with information such as course details, prerequisites, and objectives.

☞ *Refer to* **Implementing Training Administration** *(on page 23) for details.*

Questions answered

The following questions are answered in this section:

1. What is a course?
2. What are training objectives and how are they used?
3. What types of costs can be recorded?
4. How are prerequisites and skills used?
5. How are coordinators and providers used?

What is a course?

A course is a separate unit of instruction in a subject. For example, 'Using The Solution Series: Administrative Solutions' is a course. This may be applied to a training course provided internally or externally.

See also:

- Setting Up Training Courses ***(on page 53)***

For detailed directions on setting up Training Courses.

Apply the Concept
Define the term *course.*

The differences between courses, classes, and programs

One of the differences between courses, classes, and programs is that a course is a separate unit of instruction in a subject. Course information is set up using the Course Directory form. Training course information is defined on six form panels. Each form panel is used to define a different type of course information.

A class is an occurrence of a course that is specific to a location and a date. For example, 'Using The Solution Series: Administrative Solutions' on Thursday, December 21, in Chicago is a class of the course 'Using The Solution Series: Administrative Solutions'. Class information is set up using the Class Schedule form.

Finally, a program is a series of classes. For example, 'The Cyborg Training Schedule for January-June 1999' is a program of the classes provided by Cyborg Systems. Program information is set up using the Program Schedule form.

See also:

- Setting Up Training Courses ***(on page 53)***

For detailed directions on setting up Training Courses.

Apply the Concept
Define the term *class.*

Apply the Concept
Define the term *program.*

Training objectives and their uses

The provider identifies a course objective for each course. The objective may be a skill, level of competency, and so forth. All courses set up on Training Administration can have training objectives associated with them. These can then be matched against an employee's training objective to find the best course for the employee to attend.

It is important to set up all courses with a full range of identified training objectives so that the staff can find the best course available for an employee.

The list of course objectives is displayed in the Course Objectives option list (TR03) on the Course Directory: Objectives form (10RSCR). Once the Course Objectives list boxes are populated, you will be able to search for a desired training objective without knowing the name of the training course.

The Objectives panel of the Course Directory form (10RSCR) allows you to input objectives to be met by students attending the course. These objectives are displayed on the Training Results/History form (30RSCR) for each employee who completes the course. Depending on how the employee did in the course, each objective may or may not have been met. For example, the employee may have met only four of the eight course objectives. Or, if the employee failed the course, no objectives were met.

See also:

- Entering course objectives (optional) ***(on page 56)***
For detailed directions on entering course objectives.

Types of costs

Costs are recorded at three levels within Training Administration: course, class, and employee. This is appropriate because costs are often incurred at these three levels. For example, the cost of books might be standard for all classes within a course and therefore would need to be recorded at the course level. Alternatively, the cost for a course instructor's fee might vary at the class level, since different instructors might charge different amounts. Finally, airfare and other costs of attending the class would be associated with an employee.

The system automatically totals all costs to determine a total cost for each level of each course given.

In addition to the three levels of cost, the system uses six categories to further define those costs. These are defined in the Cost Category option list (TR14) on the Course Directory: Costs form (10RSCR). The categories of 'Equipment', 'Individual', and 'Operating' are carried through to the class level. Categories of 'Per Head' and 'Participant' indicate employee-level costs.

The Course Development Costs form (11RSCR) is used to record and view the costs associated with the development of a training course. These are the one-time up-front costs associated with the course.

The Employee Training Class Costs form (34RSCR) is used to record costs associated with a specific employee taking an internal or external training class. Examples of these costs include airfare, lodging, prorated salary expenses, and so forth. For internally administered classes, employee-level costs that are the same for all class participants are recorded at the course or class level. These costs can be viewed in Display mode on a second form panel to give a complete picture of employee training costs.

The Course Directory form (10RSCR) must already be established for the course for which development costs are being recorded.

See also:

- Entering course costs (optional ***(see "Entering course costs (optional)" on page 59))***
For detailed directions on entering course costs.

- Entering course development costs (optional) ***(on page 62)***
For detailed directions on entering course development costs.

Apply the Concept
What three types of costs can be recorded in Training Administration?

Apply the Concept
List two examples of employee-level costs.

Prerequisites and skills and their relationship

Using the course Prerequisite panel to define skills and course-level requirements for a particular course is optional. A prerequisite may be prior course attendance, mastery of certain skills and abilities, level of experience, and so forth. Prerequisites are recorded on the Course Directory: Prerequisites form.

The Skills/Competencies panel of the Course Directory form (10RSCR) allow you to input skills that will be obtained by students who successfully complete a course. These skills will be populated onto the student's Skills And Competencies form (33-SCR) upon successful completion of the course, thus reducing the amount of data input necessary to maintain a current and accurate skills log for employees.

The achievement of certain skills (such as Claim Accounting, Procedure Writing, Project Presentation, Banking Regulations) as defined in the Skill Code option list (MP01) could be considered prerequisites for other courses. Because of this relationship between skills and prerequisites, it is important to populate the list of prerequisites with selected skills (as one source of prerequisite information) if you plan to use this form panel. When prerequisites for a student's participation in a course are checked at some point in the future, the Skills And Competencies form (33-SCR) can be viewed to see if any skill requirements have been met.

See also:

- Entering skills and competencies (optional) ***(on page 57)***
For detailed directions on entering skills and competencies.

- Entering course prerequisites (optional) ***(on page 61)***
For detailed directions on entering course prerequisites.

Apply the Concept
What are the prerequisites to setting up training course details?

Apply the Concept
List two examples of skills/competencies that can be defined on the system.

Copying common course information

The Course Copy Facility panel of the Course Directory form allows you to copy course information that has already been defined to a different Course/Effective Date. This is especially helpful if you are retaining a course history and the data on only one form panel is changing with the new effective date. You may also copy course information to a new or different course with the same date.

See also:

- **Copying training courses (optional)** ***(on page 65)***

For detailed directions on copying training courses.

Apply the Concept

Consider the way course information is currently managed/tracked in your organization and determine whether it will be useful for you to use all or some of the optional panels included on the Course Directory form. Which ones will be most beneficial to you?

Uses of coordinators and providers

Coordinators are set up on the Coordinator Index form (14RSCR) and are either employees or external persons who administer training classes. Sample options in the Coordinator Index option list (TR27) provide titles such as 'Management Classes', meaning the Coordinator of Management Classes. Your descriptions may be titles or actual names. Coordinators should be set up during implementation.

Providers are set up on the Provider Index form (19RSCR) and are instructional institutions, organizations, or persons who are available to teach training classes. Sample options in the Provider Index option list (TR38) provide titles such as 'Chicago Staffed', meaning the trainer is based in Chicago. Your descriptions may be titles or actual names. Providers should be set up during implementation.

Details about course providers and coordinators can be defined on forms and then recorded at the class level to help you capture all training-related data. Queries and reports provide administrative support and create management tools to determine instructors' schedules, courses taught, dates booked, and so forth, and to produce class confirmation letters that contain provider and coordinator information along with all other relevant class information.

See also:

- Setting up training course coordinators (optional) ***(on page 70)***
For detailed directions on setting up coordinators.

- Setting up training course providers (optional) ***(on page 72)***
For detailed directions on setting up providers.

Apply the Concept

When setting up a new training course coordinator who is an employee (versus an external coordinator), what , if anything, do you do differently when entering data on the Coordinator Index form?

Apply the Concept

Consider how your organization might use the Provider Index and Coordinator Index and describe how you might customize these option lists to meet your needs.

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

Tasks

Setting up Training Courses

To set up training courses using the Course Directory form (10RSCR), follow these steps:

Note: *You must set up the titles of new courses in the Course Codes option list (TR33) before following this procedure.*

You may also need to add entries to the following option lists: Providers (TR38) , Course Subject (TR30), Course Level (TR01), Course Type (TR02), and Training Area (TR10).

1. Access the Course Directory form (10RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Courses
Task: Setup/Maintain Course

For practice, access the Course Directory form (10RSCR).

2. Click the Clear button

To avoid copying pre-existing information, click the Clear button on the toolbar to clear the text boxes on the form.

For practice, click the Clear button on the toolbar.

3. Select the Course

Select the appropriate training course.

As an alternative, select the List Course Options option in the Course Codes option list (TR33) and then click Save or press Enter to display a list of course options and their descriptions. Select a course code from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

4. Enter the Effective Date

Type the date the course becomes effective. The format for this text box must be entered as MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

For practice, type '01-01-1997'.

5. Type a Description (optional)

If left blank, the description defaults to the course name.

For practice, leave this text box blank.

6. Enter Comments (optional)

This text box may be used for additional information about the course.

For practice, type 'This course is a Human Resource overview'.

7. Select a Subject (optional)

Select the subject of the course, for example, 'Marketing Theory'.

For practice, select 'HR Management'.

8. Select the Type (optional)

Select the type of course, for example, 'CBT' or 'Orientation'.

For practice, select 'Lecture'.

9. Select the Training Area (optional)

Select the area responsible for this course, for example, 'Customer Support'.

For practice, select 'Corporate Services'.

10. Select the Course Level (optional)

Select the level of difficulty of the training course subject matter.

For practice, select 'Introductory'.

11. Select the Provider (optional)

Select the provider (trainer) of the training course.

For practice, type 'Chicago Staffed'.

12. Enter the Training Units (optional)

Type the number of training units this course is to be assigned, using an nnn format with no decimals.

For practice, type '20'.

13. Enter the Duration (Hours) (optional)

Type the total hours for this course in nnn.n format.

For practice, type '24.0'.

14. Type the Minimum (number of students)

This entry must be less than or equal to the entry for the maximum number of students who may attend this course based on space availability and/or instructor preferences.

For practice, type '5'.

15. Type the Maximum (number of students)

This entry must be greater than or equal to the minimum number of students required for the course to be held.

For practice, type '10'.

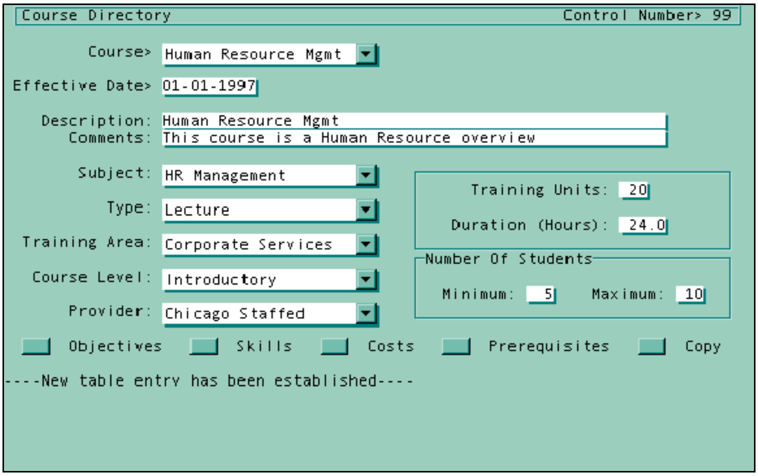
16. Click Save or press Enter

The training course record is created and the following message is displayed:

'—New table entry has been established—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- What is a course? ***(on page 45)***

For an explanation of what a course is.

- The differences between courses, classes, and programs ***(on page 46)***

For an explanation of the differences between course, classes and programs.

Entering course objectives (optional)

To set up course objectives, follow these steps:

Note: *You may skip steps 1 and 2 if you have just completed the setup of a new course and are still displaying the Course Directory form (10RSCR). You may need to set up options in the Course Objectives option list (TR03) before following this procedure.*

1. Access the Course Directory form (10RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Courses
Task: Setup/Maintain Course

For practice, access the Course Directory form (10RSCR).

2. Select a training course

Access the selections list by clicking the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Human Resource Mgmt' dated '01-01-1997'.

3. Access the Objectives panel

Click the Objectives command button to access the Objectives form panel. The Course list box and Effective Date text box are carried over from the Set Up form panel.

For practice, click the Objectives command button.

4. Select Objectives

Select up to eight course objectives.

For practice, select 'Gain General Skills' for Objective 1 and 'Org Structures' for Objective 2.

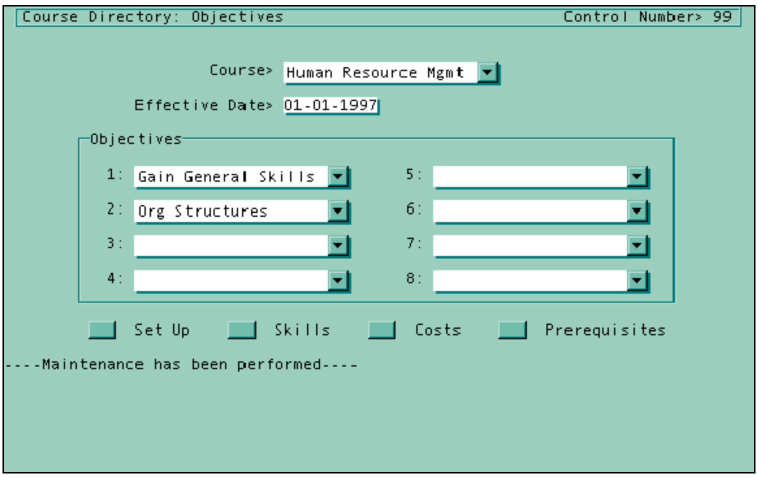
5. Click Save or press Enter

The following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Training objectives and their uses ***(on page 47)***

For an explanation of training objectives and their uses.

Entering skills and competencies (optional)

To enter skills and competencies for a course, follow these steps:

Note: You may skip steps 1 and 2 if you have just completed the setup of a new course and are still displaying the Course Directory: Objectives form (10RSCR).

You may need to review and set up additional skills and competencies in the Skill Code option list (MP01) before following this procedure.

1. Access the Course Directory form (10RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Courses
Task: Setup/Maintain Course

For practice, access the Course Directory form (10RSCR).

2. Select a training course

Access the selections list by clicking the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Human Resource Mgmt' dated '01-01-1997'.

3. Access the Skills/Competencies panel

Click the Skills command button to access the Skills/Competencies form panel. The Course list box and Effective Date text box are carried over from the Set Up form.

For practice, click the Skills command button.

4. Select the Skills/Competencies

Select a suitable entry. Up to five skills and the relevant proficiency level for each can be entered on this panel. If you want to define up to five additional skills and proficiency levels, select the Skills 6-10 command button in the upper right of the form.

For practice, select 'Human Resource Manag'.

5. Select the Proficiency

Select a proficiency level for each skill.

For practice, select 'Expert'.

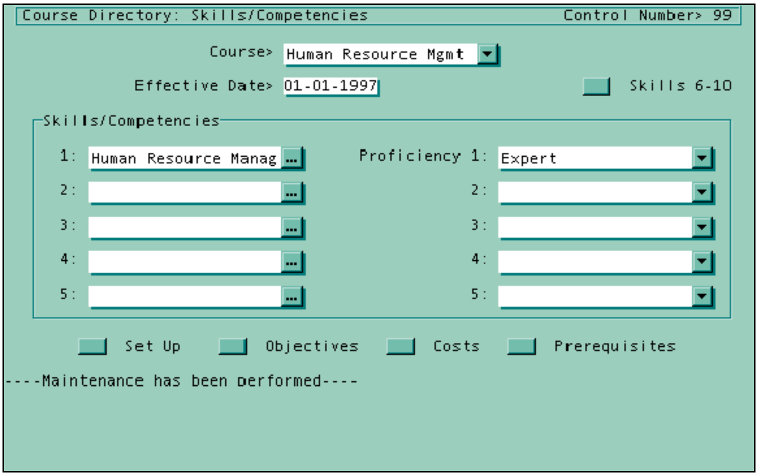
6. Click Save or press Enter

The following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:


Course Directory: Skills/Competencies Control Number> 99

Course> Human Resource Mgmt

Effective Date> 01-01-1997 Skills 6-10

Skills/Competencies

1: Human Resource Manag Proficiency 1: Expert

2: 2:

3: 3:

4: 4:

5: 5:

Set Up Objectives Costs Prerequisites

----Maintenance has been performed----

See also:

- Prerequisites and skills and their relationship ***(on page 50)***

For an explanation of perquisites and skills and their relationship.

Entering course costs (optional)

To enter course costs, follow the steps in this task.

Note: *You may skip steps 1 and 2 if you have just completed the setup of a new course and are still displaying the Course Directory: Skills /Competencies form (10RSCR).*

You may need to review and set up additional Cost Categories (TR14) and Training Cost Types (TR31) option list values before following this procedure.

1. Access the Course Directory form (10RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Courses
Task: Setup/Maintain Course

For practice, access the Course Directory form (10RSCR).

2. Select a training course

Access the selections list by clicking the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Human Resource Mgmt' dated '01-01-1997'.

3. Access the Costs panel

Click the Costs command button to access the Costs panel. The Course list box and Effective Date text box are carried over from the Set Up form panel.

For practice, click the Costs command button.

4. Select the Category

Select up to five cost categories (such as 'Equipment').

Note: *Categories of 'Equipment', 'Individual', or 'Operating' are carried through to class level. Categories of 'Per Head' and 'Participant' indicate employee-level costs.*

For practice, select a cost category of 'Equipment'.

5. Select the Type

Select up to five cost types, for example, 'Overhead Projector'.

For practice, select 'Large Monitor rental'.

6. Enter the amount

This text box is edited as --,---.99

Note: *The Category, Type, and Cost Amount on each line are tied together and define a cost description and amount.*

For practice, type '2,000.00'.

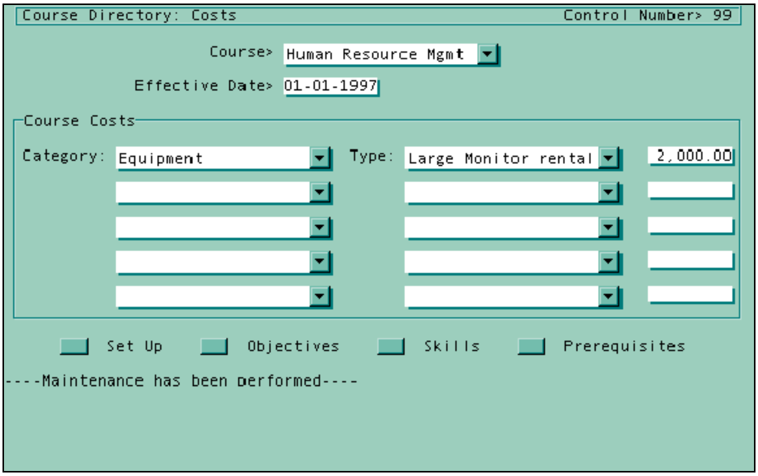
7. Click Save or press Enter

The following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Types of costs ***(on page 48)***

For an explanation of types of costs.

Entering course prerequisites (optional)

To set up course prerequisites, follow these steps:

Note: *You may skip steps 1 and 2 if you have just completed the setup of a new course and are still displaying the Course Directory: Costs form (10RSCR).*

You may need to review and set up additional prerequisites in the Course Pre-requisite option list (TR32) before following this procedure.

1. Access the Course Directory form (10RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Courses
Task: Setup/Maintain Course

For practice, access the Course Directory form (10RSCR).

2. Select a training course

Access the selections list by clicking the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Human Resource Mgmt' dated '01-01-1997'.

3. Access the Prerequisites panel

Click the Prerequisites command button to access the Prerequisites form panel. The Course list box and Effective Date text box are carried over from the Set Up form panel.

For practice, click the Prerequisites command button.

4. Select Prerequisites

Select up to six prerequisites, for example, 'Supervisory Course'.

For practice, select '1 Yr Mgmt Experience' for Prerequisite 1 and 'Supervisory Course' for Prerequisite 2.

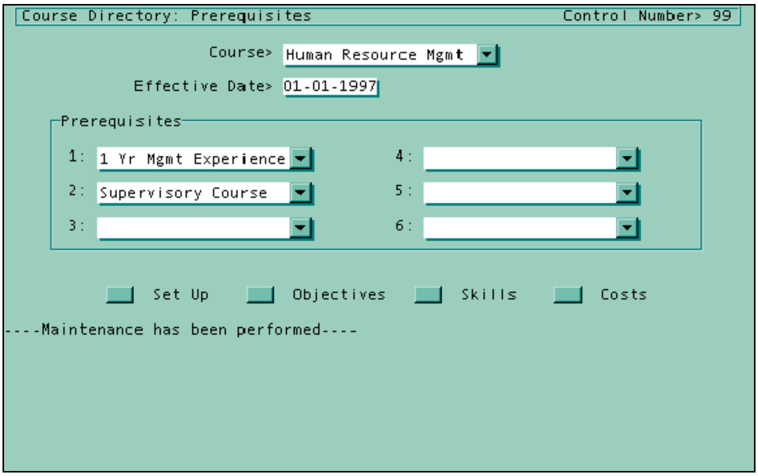
5. Click Save or press Enter

The following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

■ Prerequisites and skills and their relationship ***(on page 50)***
For an explanation of perquisites and skills and their relationship.

Entering course development costs (optional)

To set up course development costs, follow these steps:

1. Access the Course Development Costs form (11RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Courses
Task: Entering Development Costs

For practice, access the Course Development Costs form (11RSCR).

2. Select a Course

Select a course. As an alternative, select the List Course Options option in the Course list box and then click Save or press Enter to display a list of course options and their descriptions. Select a course code from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

3. Enter the Effective Date

Type the date the cost was incurred in MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

For practice, type '10-02-1997'(US and Canada) or '02-10-1997'(elsewhere).

4. Enter the Development Cost

Type the cost of developing the training course.

This text box is edited as -,---,---. For example, 5,000.00 is entered as '5000'.

For practice, type '7550'.

5. Enter Comments (optional)

Type free-form comments here.

For practice, type 'One-time cost for all facilities'.

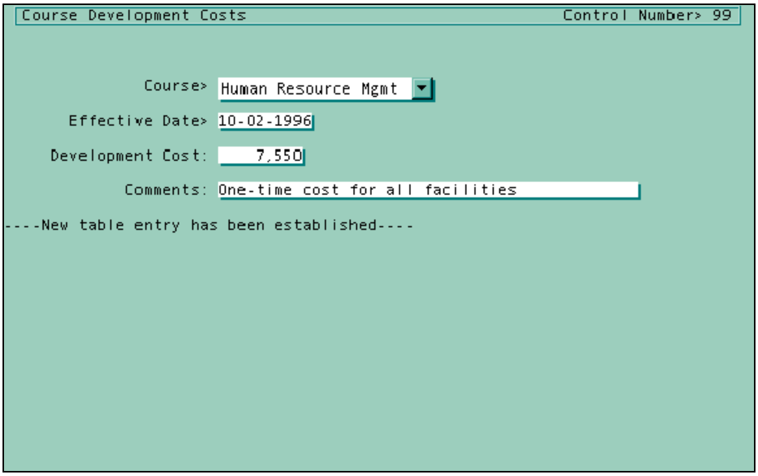
6. Click Save or press Enter

The following message is displayed:

'—New table entry has been established—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Types of costs ***(on page 48)***

For an explanation of types of costs.

Changing course details

To modify course details, follow these steps:

1. Access the Course Directory form (10RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Courses
Task: Setup/Maintain Course

For practice, access the Course Directory form (10RSCR).

2. Select a training course

Access the selections list by clicking the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Human Resource Mgmt' dated '01-01-1997'.

3. Select a text box to change

Select the text box you need to change and enter the changed information.

For practice, change the Duration (Hours) text box to '16.0'.

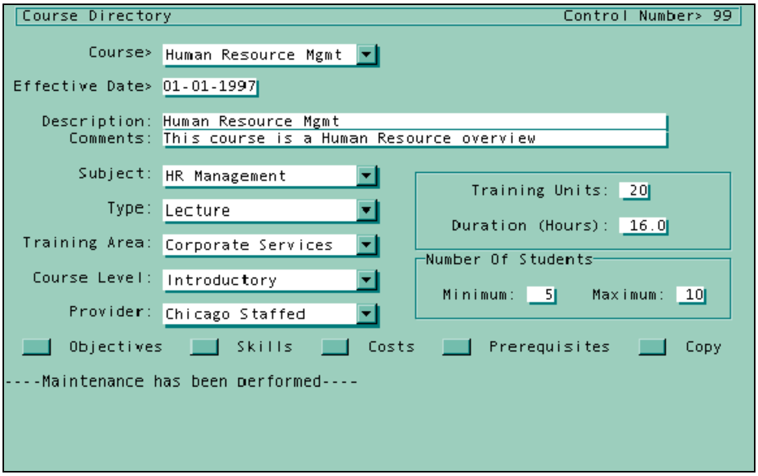
4. Click Save or press Enter

The modified record is created for the course details and the following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:


Course Directory Control Number> 99
Course> Human Resource Mgmt
Effective Date> 01-01-1997
Description: Human Resource Mgmt
Comments: This course is a Human Resource overview
Subject: HR Management
Type: Lecture
Training Area: Corporate Services
Course Level: Introductory
Provider: Chicago Staffed
Training Units: 20
Duration (Hours): 16.0
Number Of Students
Minimum: 5 Maximum: 10
Objectives Skills Costs Prerequisites Copy
----Maintenance has been performed----

Copying training courses (optional)

Follow these steps to copy course information to a different Course/Effective Date:

Note: *You may need to set up the new course title in the Course Codes option list (TR33) before following this procedure.*

1. Access the Course Directory form (10RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Courses
Task: Setup/Maintain Course

For practice, access the Course Directory form (10RSCR).

2. Select a training course

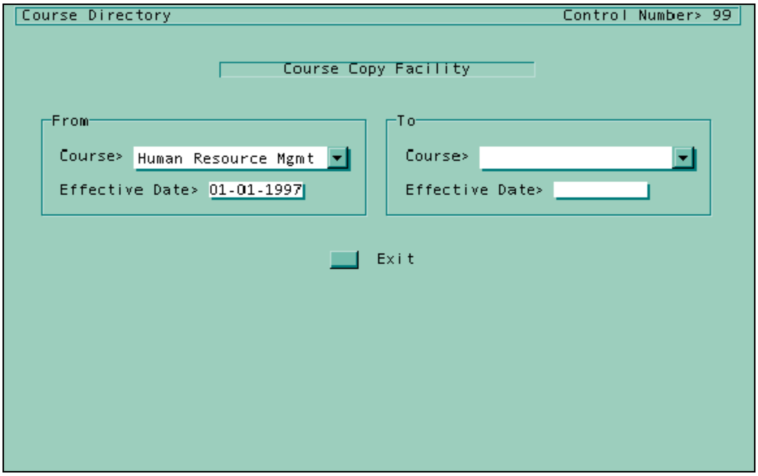
Access the selections list by clicking the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Human Resource Mgmt' dated '01-01-1997'.

3. Access the Copy panel

Click the Copy command button to access the Course Copy Facility. The Course list box and Effective Date text box are displayed in the 'From' group box.

For practice, click the Copy command button.



4. Select the Course and/or Effective Date for the new course in the 'To' group box

Leave the course selection blank to copy the old course value to the new course with a different effective date, or select a new course and type its effective date (if different from the one in the From group box) to copy data to a new course.

For practice, select a new course, 'Position Management', and leave the Effective Date text box blank.

5. Click Save or press Enter

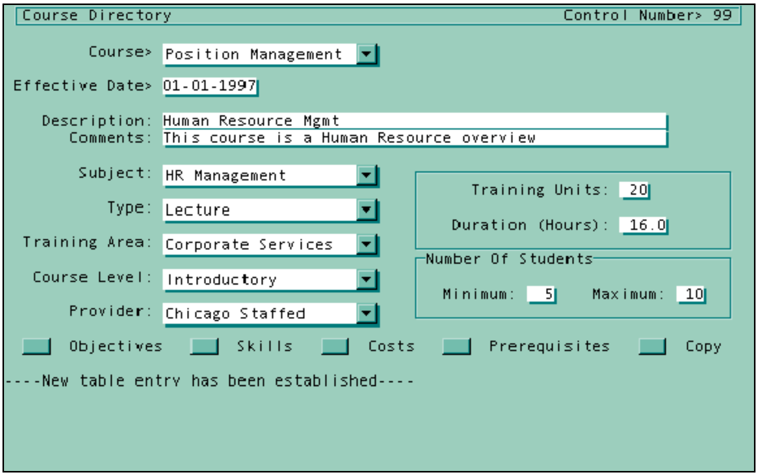
The course data are copied to the new course and/or effective date. The Set Up form is returned with the new course information and the following message is displayed:

'—New table entry has been established—'.

Modifications to other text boxes can now be made, if required.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Copying common course information ***(on page 51)***

For an explanation of copying common course information.

Checking available courses

To view available training courses using the Course Directory report (44RRPT), complete the report schedule by entering the following report parameters:

Note: *Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.*

1. Enter the As Of Date (optional)

Type the 'As of Date' in the MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere). Only current courses in effect as of this date are included on the report.

Note: *If this text box is left blank, the system date is used.*

For practice, type '01-01-1997'.

2. Select the Course (optional)

Select the course to be printed.

Note: *If this list box is left blank, all courses are reported.*

For practice, leave this list box blank.

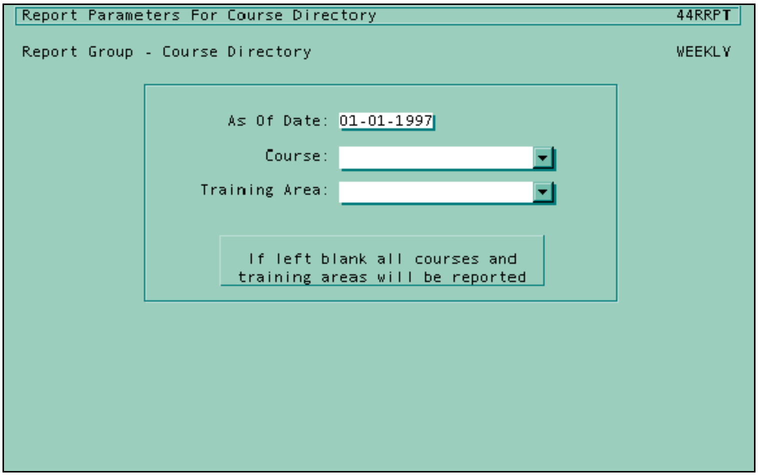
3. Select the Training Area (optional)

Select the training area to be printed.

Note: *If this list box is left blank, all training areas are reported.*

For practice, leave this list box blank.

When completed, the report parameters may look similar to the example that follows:



4. Click Save or press Enter

Once it has been processed, this report provides a printout of the information on the Course Directory table (10RSCR).

For practice, click Save or press Enter.

See also:

- **Course Directory report** ***(see "Report Quick Reference" on page 243)***
For an explanation of this report and its business uses.

Deleting courses

To delete a training course set up in error, follow these steps:

1. Access the Course Directory form (10RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Courses
Task: Setup/Maintain Course

For practice, access the Course Directory form (10RSCR).

2. Select a training course

Access the selections list by clicking the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Position Management' dated '01-01-1997'.

3. Click Save or press Enter

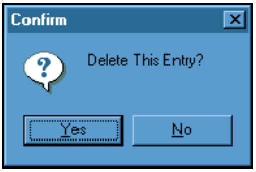
Click Save or press Enter to display the course.

For practice, click Save or press Enter.

4. Click the Del Entry button

Delete the entry by clicking on the Del Entry button on the toolbar.

A Confirm dialog box displays.



For practice, click the Del Entry button.

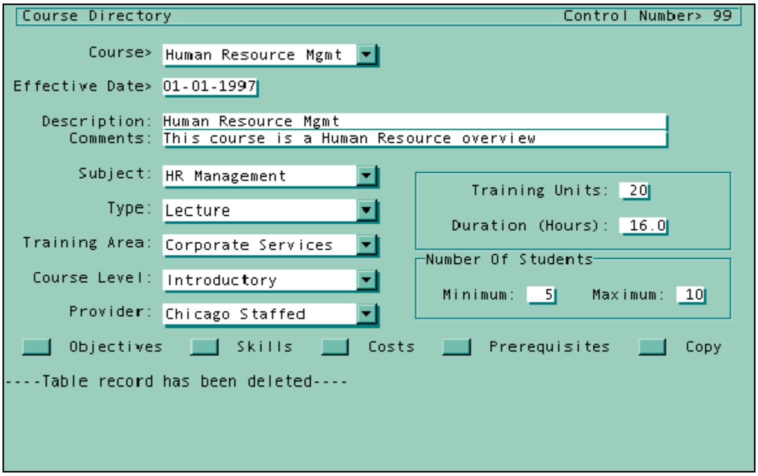
5. Click the Yes command button

Confirm the deletion by clicking on the **Y**es command button.

The message '—Table record has been deleted—' displays at the bottom of the form. The form displayed is the first form on the selections list.

For practice, click the Yes command button.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



Setting up training course coordinators (optional)

To set up training course coordinators (employees or external persons who administer training classes), follow these steps:

Note: *You may need to set up Coordinators in the Coordinator Index option list (TR27) before following this procedure.*

1. Access the Coordinator Index form (14RSCR)

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Setup and Maintain Courses
Task:	Setup/Maintain Course Coordinators

For practice, access the Coordinator Index form (14RSCR).

2. Click the Clear button

To avoid copying pre-existing information, click the Clear button on the toolbar to clear the text boxes on the form.

For practice, click the Clear button on the toolbar.

3. Select a Coordinator

Select a training course coordinator.

For practice, select 'HR Classes'.

4. Enter an Address and ZIP Code (optional)

Type an address and ZIP code for the coordinator.

For practice, type a sample address and ZIP code.

5. Select a Type (optional)

Select the type of coordinator, for example, employee or external.

For practice, select 'Employee'.

6. Enter a Name (optional)

Type the coordinator's name. If this is an employee, this text box will be populated by the system.

For practice, leave this text box blank.

7. Enter an Organization (optional)

If the coordinator is an employee, type the employee's organization.

For practice, type '999999'.

8. Enter a Phone and Ext (optional)

Type the coordinator's phone number and extension. If this is an employee and this information is present on the employee's record, these text boxes will be populated by the system.

For practice, leave these text boxes blank.

9. Enter an Employee Nbr (optional)

If the coordinator is an employee, type the employee number.

For practice, type '1234'.

10. Enter a FAX (optional)

Type the coordinator's fax number.

For practice, leave this text box blank.

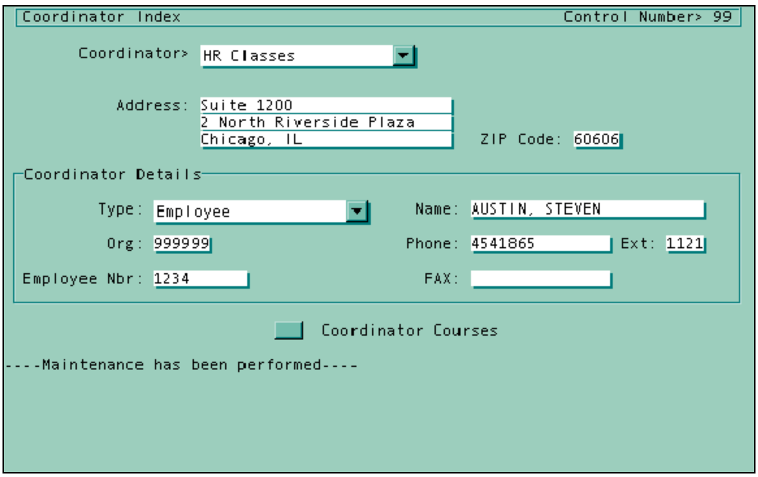
11. Click Save or press Enter

Click Save or press Enter to process the new Coordinator information. The coordinator information is set up and the following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



12. Click the Coordinator Courses command button (optional)

The Coordinator Courses panel is displayed. The Coordinator list box is carried over from the first form panel and does not need to be entered.

For practice, click Coordinator Courses.

13. Select Coordinator Courses (optional)

Using the option lists, select up to eight courses the coordinator can administer.

For practice, select 'Human Resource Mgmt'.

14. Select the Stop Date (optional)

Each coordinator course selected can have a stop date entered to indicate when the coordinator will no longer administer the course. Type the date in MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

For practice, type '01-01-1998'.

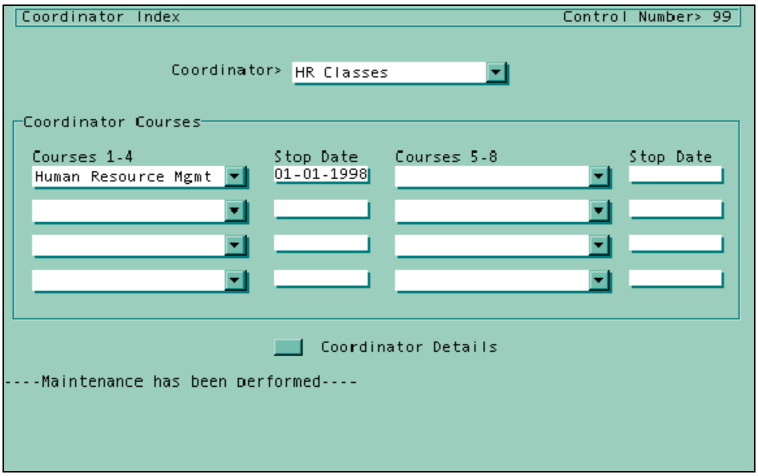
15. Click Save or press Enter

The coordinator course information is set up and the following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Uses of coordinators and providers ***(on page 52)***

For an explanation of the use of coordinators and providers.

Setting up training course providers (optional)

To set up training course providers (individuals or organizations who are available to teach training courses), follow these steps:

Note: *You may need to set up the following option lists: Providers (TR38), Course Categories (TR14), and Provider Types (TR07) before following this procedure.*

1. Access the Provider Index form (19RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Courses
Task: Setup/Maintain Course Providers

For practice, access the Provider Index form (19RSCR).

2. Click the Clear button

To avoid copying pre-existing information, click the Clear button on the toolbar to clear the text boxes on the form.

For practice, click the Clear button on the toolbar.

3. Select a Provider

Select a training course provider.

For practice, select 'Chicago Staffed'.

4. Enter an Address and ZIP Code (optional)

Type an address and ZIP code for the provider.

For practice, type a sample address and ZIP code.

5. Select a Course Category (optional)

Select a course category to show what types of courses the provider can teach.

For practice, select 'HR Management'.

6. Select a Type (optional)

Select the type of provider, for example, 'Employee' or 'External'.

For practice, select 'Employee'.

7. Enter the Org (optional)

If the provider is an employee, type the employee's organization designation.

For practice, type '999999'.

8. Enter the Employee Nbr (optional)

If the provider is an employee, type the employee number.

For practice, type '1111'.

9. Enter the Contact (optional)

Type the name for the provider's contact.

For practice, leave this text box blank.

10. Enter the Phone (optional)

Type the phone number for the provider's contact.

For practice, leave this text box blank.

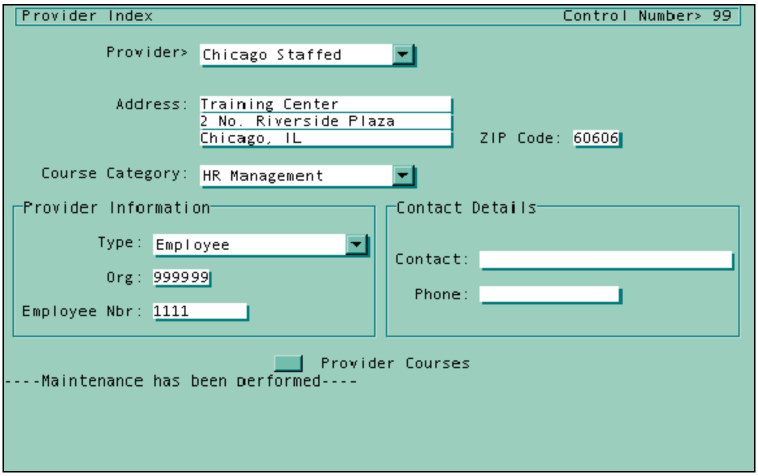
11. Click Save or press Enter

Click Save or press Enter to process the new provider information. The provider information is set up and the following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



12. Click the Provider Courses command button (optional)

The Eligible to Teach panel is displayed. The Provider list box is carried over from the first form panel and does not need to be entered.

For practice, click the Provider Courses command button.

13. Select Courses (optional)

Using the option lists, select up to eight courses the provider can teach.

For practice, select 'Human Resource Mgmt'.

14. Select the Stop Date (optional)

Each provider course selected can have a stop date entered to indicate when the provider will no longer teach the course. Type the date in MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

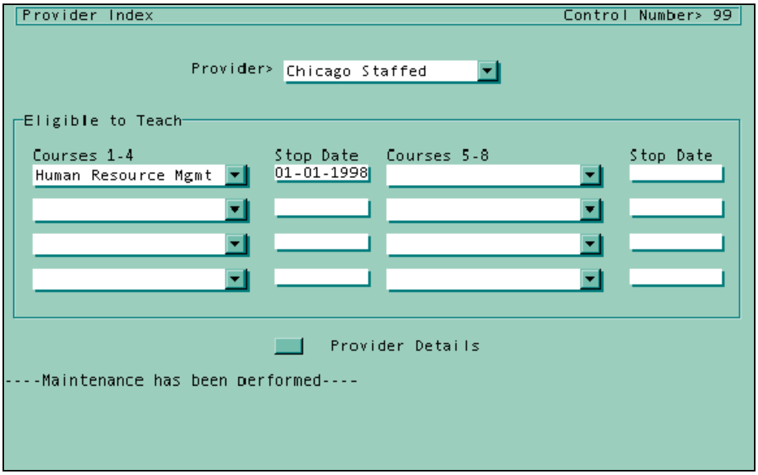
For practice, type '01-01-1998'.

15. Click Save or press Enter

The provider course information is set up and the following message is displayed:

'—Maintenance has been performed—'.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Uses of coordinators and providers ***(on page 52)***

For an explanation of the use of coordinators and providers.

Extended Practice

1. Add these additional codes to the option lists below using the Option List Editor (CSUPDT) dialog box:

Option List	Code	Description
Course Options (TR33)	FB001	Flex Benefits
Course Subjects (TR30)	FBC	Flex Benefit Concpts
Course Objectives (TR03)	GFK	Gain Flex Knowledge
Training Cost Type (TR31)	BF	Breaks/Refreshments

2. Set up a new course with these characteristics:

Text box	Entry
Course	Flex Benefits
Effective Date	September 1, 1996
Description	Provide overview of Flex Benefits administration.
Comments	Provides foundation for implementing Flex Benefits.
Subject	Flex Benefits Concpts
Type	Lecture
Training Area	IT Services
Course Level	Introductory
Provider	Cyborg Systems
Training Units	[Leave Blank]
Duration	16.0 Hours
Number of Students	Between 4 and 15

3. Select two appropriate course objectives for this courses from the option lists.

4. Select these skills and proficiency levels for Flex Benefits:

Skills/Competencies	Proficiency
Administration/manag	Above Average Knowld
Benefits Coordinator	Working Knowledge

5. Set up these course-related costs for Flex Benefits:

Category	Type	Amount
Participant	Class Fee	300.00
Operating	Breaks/Refreshments	50.00

6. Return to the Set Up panel and select the course 'Human Resource Management' dated '01-01-1994'. Copy this same course with a new effective date of February 1, 1997. When the Set Up form is returned, modify the Provider list box to an entry of 'Cyborg

Systems' and change the maximum number of students to '12'. Update the Instructor Fee cost to 1500.00 on the appropriate panel.

7. Set up a Course Development Costs form (11RSCR) for the Flex Benefits course, indicating a fee of 7500 for developing the course manual.

8. Set up a Flex Benefits course provider with these characteristics:

Text box	**Entry**
Provider	Cyborg Systems
Address, ZIP code	2 North Riverside Plaza, Chicago, IL 60606
Course Category	All Cyborg Classes
Type	External
Org	[Leave Blank]
Employee Nbr	[Leave Blank]
Contact	Smith, Sarah Jane
Phone	312/454-1865
Courses 1-4	HR Mgmt and Position Management courses
Stop Date	December 31, 1999 for both

9. Set up a Flex Benefits course coordinator with these characteristics:

Text box	**Entry**
Coordinator	Cyborg Class Coord
Address	1142 N. Rush Street, Commerce Plaza, Chicago, IL 60606
Type	Employee
Name	[Leave blank (self-populating)]
Org	999999
Phone	[Leave blank (self-populating)]
Employee Nbr	2008
FAX	[Leave blank]
Courses 1-4	HR Mgmt and Position Management courses
Stop Date	[Leave blank]

10. The contact listed for provider 'Cyborg Systems' just got married. Change the contact details to reflect a name change to 'Jones' and a new phone number of '312/252-6888'.

11. The Cyborg Class Coordinator just terminated her employment. The new Cyborg Class Coordinator is Employee '1006'. Make this change on the appropriate form.

Review of Questions Answered

1. What is a course?

2. What are training objectives and how are they used?

3. What types of costs can be recorded?

4. How are prerequisites and skills used?

5. How are coordinators and providers used?

CHAPTER 5

Setting Up and Maintaining Training Classes

In This Chapter

Introduction

Training Administration facilitates the setting up and maintenance of training classes to be given on a specific date(s). The information that can be recorded includes class location, class dates, class times, trainer/coordinator information, and class costs.

The information discussed in this section is essential to using Training Administration.

Tasks

You may complete the following tasks to set up training classes. Only the first task is essential. The tasks have been divided into two categories, Set Up Training Classes and Maintain Training Classes.

Set Up Training Classes

The following are typical setup tasks that you may wish to perform:

- Setting up a training class
- Setting up class time and location
- Checking trainer schedules online
- Checking trainer schedules on paper
- Setting up the class trainer/coordinator
- Setting up class costs

Maintain Training Classes

The following are typical maintenance tasks that you may wish to perform:

- Changing class details
- Copying, canceling, and transferring a class
- Notifying students of a class cancellation
- Checking what classes have been set up - online
- Checking what classes have been set up - using a report

Prerequisites

Before you can begin to set up training classes, all the following tasks must have been completed.

Organization details

Before any data can be entered, you must ensure that your organization details have been set up.

☞ *Refer to* **Implementing Training Administration** *(on page 23) for more information.*

Training Courses

Before setting up training classes, it is important to enter all available training courses on the system and to set up objectives, prerequisites, and costs for each course.

☞ *Refer to* **Setting Up and Maintaining Training Courses** *(on page 43) for details on setting up and maintaining training courses.*

Questions answered

The following questions are answered in this section:

1. What is a class?
2. What four text boxes define a training class?
3. What tool can be used to display all available course options and courses?
4. What are the available class costing options?
5. What types of maintenance can be performed on classes?

Relationship between a training course and a class

A training course is a separate unit of instruction on a subject. Courses are established on the Course Directory form (10RSCR).

A class is a training course occurrence given on a specific date(s) at a specific location. Classes are established on the Class Schedule form (13RSCR). When a class is scheduled, it assumes the attributes of the course, although you can override some data (such as minimum and maximum class size) at the class-setup level.

For example, 'Using The Solution Series: Administrative Solutions' is a training course; when given on December 21 in Chicago, this is a class of this course.

Classes can only be scheduled for courses that have already been established.

Definition of a training class

The four text boxes required to define a training class are recorded on the Class Schedule form (13RSCR):

- Course
- Start Date
- Training Location
- Class sequence number

These text boxes are carried forward to many of the Training Administration class-level forms. All other information that may be entered on the Class Schedule form (13RSCR) is optional.

After entering the required text boxes, other text boxes on this form are copied from the Course Directory table (10RSCR) if they are available.

After scheduling a class, three other form panels become available and can be accessed by selecting the appropriate command buttons at the bottom of the form.

Prior to or after scheduling a training class, you may use the Training Schedule inquiry form (53RSCR) to display the upcoming schedule of training classes. You can display all upcoming classes, classes for a specific course, classes as of a specific date, classes at a specific training location, or any combination of these. Classes are always listed in ascending date order. Print the Training Schedule report (29RRPT) to provide a hard-copy listing of classes that have been scheduled for a training location. Each training location is reported separately.

See also:

- Setting up a training class ***(on page 90)***

For detailed directions on setting up a training class.

- Changing class details (optional) ***(on page 102)***

For detailed directions on changing class details.

- Checking what classes have been set up - online - optional ***(see "Checking what classes have been setup - online - optional" on page 107)***
- Checking what classes have been set up - using a report - optional

For detailed directions on verifying an existing training class.

- Training Schedule report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Apply the Concept

Describe how the use of delivered online inquiry forms such as the Individual Trainers Schedule inquiry form (55RSCR) and the Training Schedule inquiry form (53RSCR) can be helpful to you.

Uses of the Class text box

When training classes have the same course, start date, and training location values, the one-character Class sequence number text box on the Class Schedule form (13RSCR) is used to separate individual training classes. For example, you may enter a value of '1' for a particular class being offered on January 3 from 9:00 AM to 12:00 PM and a '2' for the same class being offered that afternoon from 1:00 PM to 4:00 PM.

See also:

- Setting up a training class ***(on page 90)***

For detailed directions on setting up a training class.

Using the Course/Class Selection menu

The Course/Class Selection menu is used to simplify the selection of training courses, especially if you are more familiar with the training course code than the course title.

When accessing a training course, select List Course Options in the Course option list to display a menu of available course options. Click Save or press Enter to display the options and description listing. Select a course code, then click Save or press Enter.

In addition, on all forms on which training class information is recorded, entering a question mark (?) on class forms in the Start Date text box after selecting a course will display a menu of classes from which you may make your selection.

See also:

- Setting up a training class ***(on page 90)***

For detailed directions on setting up a training class.

Uses of class time and location data

Class time and location can be set up on the Time And Location panel of the Class Schedule form (13RSCR). This is an optional panel. The location specified on this panel is different (usually more specific) than the course training location that is defined when setting up the training course (see ***Setting Up and Maintaining Training Courses*** (on page 43)). For example, a course training location could be defined as Chicago, and the Location value on the Time And Location form panel could be defined as the University of Chicago Training Center.

Other text boxes can be used to further define class time and location. Information that can be recorded includes:

- Day(s)
- Start Time
- End Time
- Room

For classes with multiple days and times, each class can have up to three of each of these descriptors set up.

See also:

- Setting up class time and location (optional) ***(on page 93)***

For detailed directions on setting up class time and location.

Scheduling class trainers/coordinators

Details about providers (trainers) and class coordinators (administrators) can be defined and then recorded at the class level. Use the Class Schedule form (13RSCR) to assign the trainers and coordinators for a specific class.

The Trainer Name is displayed in Display mode from the Provider Index table (19RSCR), if available. The Coordinator Name, Phone/Ext, and FAX are displayed in Display mode from the Coordinator Index table, if available. Otherwise, these text boxes remain blank.

Prior to scheduling a trainer for a class, you may use the Individual Trainers Schedule inquiry form (55RSCR) to display all the classes a trainer is scheduled to teach. Start and/or End Dates can be entered to limit the time period of classes displayed. Classes are always listed in ascending date order. You can also print the Individual Trainer Schedule report (38RRPT), which provides a hard-copy schedule of a trainer's upcoming classes. Each trainer is reported separately.

See also:

- Checking trainer schedules online - optional ***(on page 95)***
- Checking trainer schedules on paper - optional ***(on page 97)***

For detailed directions on checking trainer schedules.

- Setting up class time and location (optional) ***(on page 93)***

For detailed directions on setting up the class coordinator/trainer.

- Individual Trainer Schedule report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Apply the Concept

Describe the benefit to be realized by optionally printing hard-copy reports such as the Individual Trainer Schedule report (38RRPT) and Training Schedule report (29RRPT).

Class costing options

Class costs can be set up on the Class Costs panel of the Class Schedule form (13RSCR). This is an optional panel. Costs specified on this panel are different from those specified at the course level on the Course Directory form (10RSCR). For example, the cost of books might be standard for all classes within a course and therefore needs to be recorded at the course level. Alternatively, a course instructor fee might vary at the class level, since different instructors might charge different amounts. These costs could be recorded at the class level.

Costs can also be set up at the employee level using the Employee Training Class Costs form (34RSCR). For example, the cost of supplying an alternative vegetarian meal for an employee might be associated with an individual employee cost.

The Course Costs command button at the bottom of the Class Costs panel returns another panel that provides a summary of both the class and course costs. This panel can be used to compare and review costs at both levels.

Other methods of reviewing class costs include the Training Expenditure Charge-Back report (27RRPT), Training Expenditure Disbursement report (28RRPT), and Training Class Costs Summary inquiry form (35RSCR).

☞ *See Completing and Analyzing Training Costs for more information.*

See also:

- Setting up class costs (optional) ***(on page 100)***

For detailed directions on setting up class costs.

- Training Expenditure Charge-Back report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

- Training Expenditure Disbursement report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Apply the Concept
What types of specific class costs would you set for a new training course in your organization called 'Managing Diversity'? How would these costs differ from those established at the course level?

Types of class maintenance and their results

The Class Maintenance Facility form (18RSCR) is used to transfer, copy, and cancel training class information. A class must already exist for it to be canceled, transferred, or copied 'from'. For a class to be copied or transferred 'to' another date or location, it can not already exist. Each function is explained next.

Transferring a class

Transferring a class moves the class to a new date or location. All the currently registered and wait-listed employees are moved to the new class.

Copying a class

Copying a class copies all class-level information to a new date or location. Employee records are not changed.

Canceling a class

Canceling a class cancels any employee registrations for that class and removes any employees from the wait list for that class.

When a class is canceled, the Status text box value on the Class Schedule form (13RSCR) is changed to Canceled. For each employee enrolled or wait-listed in the class, the Class Registration/Cancellation form (20RSCR) record is deleted, as is the employee-level registration record.

A Training Required form (31RSCR) is created (or updated if it already exists) for each employee with a Status text box value of Class Canceled. The Class Cancellation report (31RRPT) is used to inform registered class participants that the entire class has been canceled.

See also:

- Copying, canceling, and transferring a class (optional) ***(on page 104)***
For detailed directions on class maintenance.

- Notifying students of a class cancellation ***(on page 105)***
For detailed directions on notifications for class cancellation.

- Class Cancellation report ***(see "Report Quick Reference" on page 243)***
For a description of this report and its business uses.

Apply the Concept
Consider how you intend to use the Class Maintenance Facility form (18RSCR) in your organization. Who will be responsible for this task?

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

Tasks

Setting up a training class

To set up a training class, follow these steps:

1. Access the Class Schedule form (13RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Classes
Task: Setup or Maintain Class

For practice, access the Class Schedule form (13RSCR).

2. Click the Clear button

To avoid copying pre-existing information, click the Clear button on the toolbar to clear the text boxes on the form.

For practice, click the Clear button on the toolbar.

3. Select the Course

Select the specific course. This selection is carried forward to this form's associated panels.

As an alternative, select the List Course Options option in the Course Codes option list (TR33) and then click Save or press Enter to display a list of course options and their descriptions. Select a course code from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

4. Type the Start Date

Type the course start date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere). This text box is carried forward to this form's associated panels.

For practice, type '01-01-1997'.

5. Select the Training Location

Select a specific training location from the drop-down list.

For practice, select 'Chicago'.

6. Type the Class

When training classes have the same course, start date, and training location values, the Class text box is used to separate individual training classes.

For practice, type '1'.

7. Type the End Date (optional)

Type the course end date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

For practice, type '01-03-1997' (US and Canada) or '03-01-1997'(elsewhere).

☞ *Steps 8 through 11 are optional. If these entries are not recorded, available information is transferred from the Course Directory form (10RSCR).*

8. Select the Training Area (optional)

Select the area responsible for the course from the drop-down list.

For practice, select 'Corporate Services'.

9. Enter the Duration (Hours) (optional)

Type the length of the class time in hours, with a five-character, one-decimal, numeric entry.

For practice, type '24.0'.

10. Enter the Minimum (optional)

Type a three-character numeric entry that is less than or equal to the entry for the maximum number of students who may attend this course based on space availability and/or instructor preferences.

For practice, type '5'.

11. Enter the Maximum (optional)

Type a three-character numeric entry that is greater than or equal to the entry for the minimum number of students required for the course to be held.

For practice, type '12'.

12. Select the Evaluation Required check box (optional)

Select this check box to have evaluation forms printed when the Class Evaluation report is run.

For practice, click the check box.

13. Enter Comments

Type any brief comments about the class in this text box.

For practice, type 'This class is an HR overview'.

14. Click Save or press Enter

The class is set up and the following message is displayed at the bottom of the form:

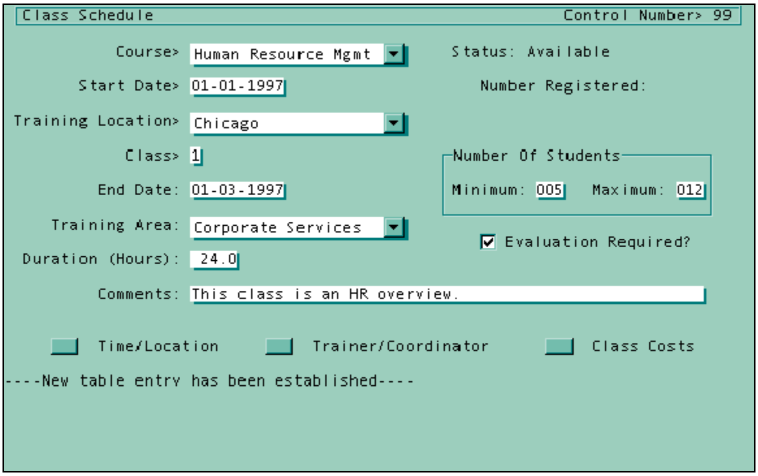
'—New table entry has been established—'.

The Status and Number Registered text boxes are displayed in Display mode at the top right of the form display. The Status is Canceled, Available (if seats are available), or Full (if no seats are available). These text boxes are displayed on every form panel connected to this form.

After scheduling a class, the other form panels are now available and can be accessed by selecting the appropriate command buttons at the bottom of this form.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:


Class Schedule Control Number> 99

Course> Human Resource Mgmt Status: Available

Start Date> 01-01-1997 Number Registered:

Training Location> Chicago

Class> 1

End Date: 01-03-1997

Number Of Students

Minimum: 005 Maximum: 012

Training Area: Corporate Services

Evaluation Required?

Duration (Hours): 24.0

Comments: This class is an HR overview.

Time/Location Trainer/Coordinator Class Costs

----New table entry has been established----

See also:

- Definition of a training class ***(on page 83)***
For an explanation of a training class.

- Uses of the Class text box ***(on page 84)***
For an explanation of the uses of the Class text box.

- Using the Course/Class Selection menu ***(on page 85)***
For an explanation of the Course/Class Selection menu.

- Class Evaluation report (24RRPT ***(see "Report Quick Reference" on page 243))***
For a description of this report and its business uses.

Setting up class time and location (optional)

To record time and location for a training class, follow these steps:

☞ *You may skip steps 1 and 2 if you have just completed the setup of a new class schedule and are still displaying the Class Schedule form (13RSCR).*

1. Access the Class Schedule form (13RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Classes
Task: Setup or Maintain Class

For practice, access the Class Schedule form (13RSCR).

2. **Select a training course**

Access the selections list by clicking on the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Human Resource Mgmt' dated '01-01-1997'.

3. **Click the Time/Location command button**

Select the Time/Location command button to access the Time and Location form panel. The Course, Start Date, Training Location, and Class sequence number text boxes are carried over from the Set Up form panel.

Up to three sets of each of the remaining text boxes on the form can be entered. This allows you to set up different start times and locations for different class dates. However, none of these remaining text boxes on this panel are required.

For practice, click the Time/Location command button.

4. **Enter the Day(s) (optional)**

This is a free-form text box to indicate the day(s) of the week on which the class is to be held, such as MW, M-Thurs, ALL.

For practice, type 'MTW'.

5. **Enter the Start (optional)**

Type the class start time in the format HH:MM. Use military time in this text box to indicate start times after noon.

For practice, type '09:00'.

6. **Enter the End (optional)**

Type the class end time in the format HH:MM. Use military time in this text box to indicate class end times after noon.

For practice, type '17:00' to indicate 5:00 P.M.

7. **Enter the Room (optional)**

Type a specific class room identifier in this text box.

For practice, type 'B'.

8. **Select a Location (optional)**

Select a specific location.

For practice, select 'Chicago Training Ctr'.

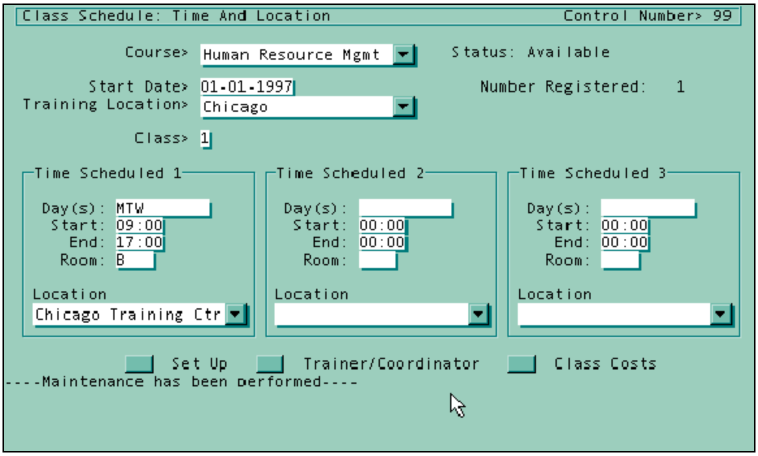
9. **Click Save or press Enter**

Time and location are scheduled and the following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Uses of class time and location data ***(on page 86)***

For an explanation of the uses of class time and location data.

Checking trainer schedules online - optional

To view trainer schedules online, use the Individual Trainers Schedule inquiry form (55RSCR) .

1. Access the Individual Trainers Schedule form (55RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Classes
Task: Check Training Schedules

For practice, access the Individual Trainers Schedule form (55RSCR).

2. Select the Trainer

Select an entry to represent the trainer.

For practice, select 'Chicago Staffed'.

3. Enter the Start (optional)

Type the start date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere). All classes with a start date equal to or later than this date will be listed.

If this text box is left blank, it defaults to the current date

For practice, type '01-01-1994'.

4. Enter the End (optional)

Type the end date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere). All classes with a start date equal to or earlier than this date will be listed.

If this text box is left blank, all dates will be listed.

For practice, type '03-01-1997' (US and Canada) or '01-03-1997'(elsewhere).

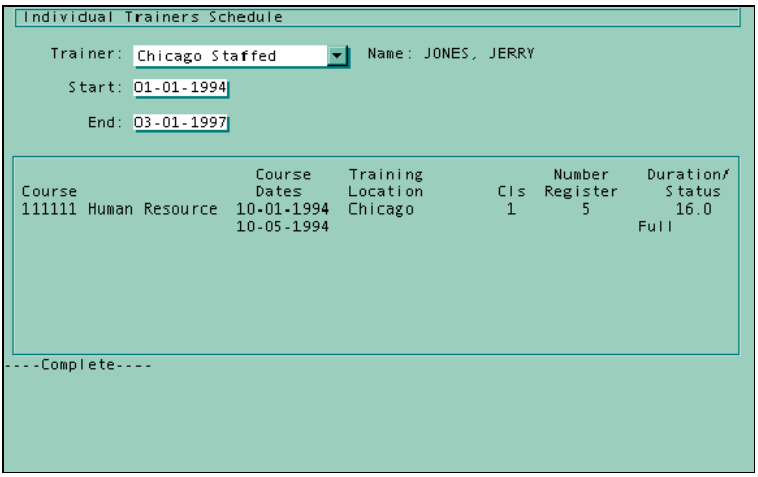
5. Click Save or press Enter

An individual trainer schedule is displayed on the form. The list shows all classes this trainer is scheduled to teach between the dates entered. When all the trainer schedule information has been reported, the following message is displayed:

'—Complete—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Scheduling class trainers/coordinators ***(on page 87)***

For an explanation of this scheduling class trainers/coordinators.

Checking trainer schedules on paper - optional

To check trainer schedules on a paper report using the Individual Trainer Schedule report (38RRPT) , complete the report schedule by entering the following report parameters:

☞ *Each trainer is reported separately. If the trainer is an employee, the employee's name is printed on the report. Totals are provided for duration in hours and number of participants. Canceled classes are not reported.*

Note: Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.

1. Enter the From (date) (optional)

Type the start date in the From text box in MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere). Only current classes in effect as of this date are included on the report.

Note: If this text box is left blank, the system date is used.

For practice, type '01-01-1997'.

2. Enter the To (date) (optional)

Type the end date in the To text box in MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

Note: If this text box is left blank, all classes equal to or later than the From date are reported. To report on classes from only one date, type the From date in both the From and To parameters.

For practice, leave this text box blank.

3. Select the Trainer (optional)

Select the trainer.

Note: If this list box is left blank, all trainers are reported.

For practice, leave this list box blank.

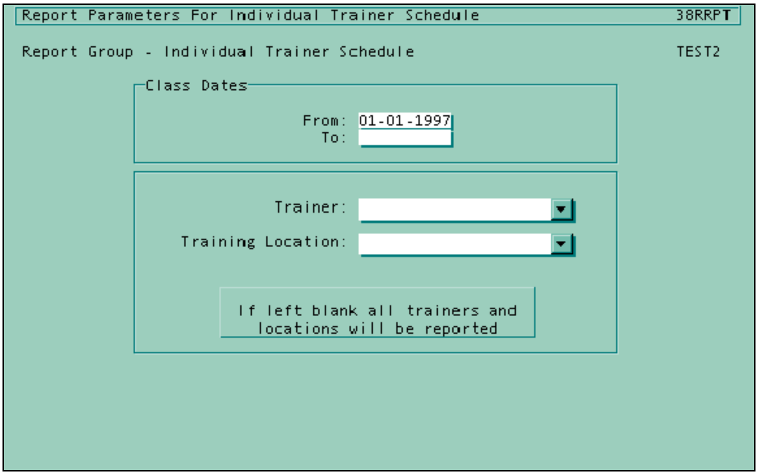
4. Select the Training Location (optional)

Select the training location.

Note: If this list box is left blank, all training locations are reported.

For practice, leave this list box blank.

When completed, the report parameters may look similar to the example that follows:



5. Click Save or press Enter

Once it has been processed, this report provides a schedule of the trainer's upcoming classes.

For practice, click Save or press Enter.

See also:

- Scheduling class trainers/coordinators ***(on page 87)***

For an explanation of this scheduling class trainers/coordinators.

- Individual Trainer Schedule report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Setting up the class trainer/coordinator (optional)

To record a trainer/coordinator for a training class, follow these steps:

☞ *You may skip steps 1 and 2 if you have just completed the setup of a new class and are still displaying the Class Schedule form (13RSCR).*

1. Access the Class Schedule form (13RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Classes
Task: Setup or Maintain Class

For practice, access the Class Schedule form (13RSCR).

2. Select a training course

Access the selections list by clicking on the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Human Resource Mgmt' dated '01-01-1997'.

3. Click the Trainer/Coordinator command button

Click the Trainer/Coordinator command button to access the Trainer/Coordinator form panel. The Course, Start Date, Training Location, and Class sequence number are carried over from the Set Up form panel. None of the remaining text boxes on this panel are required.

For practice, click the Trainer/Coordinator command button.

4. Select a Trainer

Select a trainer.

For practice, select 'Chicago Staffed'.

5. Enter the Days

This text box is used to track the number of trainer days for this specific class. It must be entered with one decimal.

For practice, type '3.0'.

6. Select a Coordinator

Select a coordinator.

For practice, select 'HR Classes'.

7. Click Save or press Enter

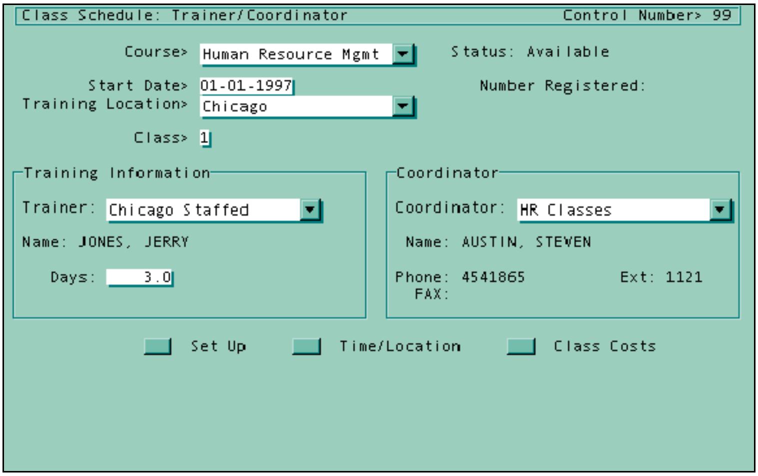
A trainer and coordinator are scheduled and the following message is displayed:

'—Maintenance has been performed—'.

The trainer Name is displayed in Display mode from the Provider Index form (19RSCR), if available. The coordinator Name, Phone, Ext, and FAX are displayed in Display mode from the Coordinator Index form (14RSCR), if available. Otherwise, these text boxes remain blank.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:


Class Schedule: Trainer/Coordinator Control Number> 99

Course> Human Resource Mgmt Status: Available

Start Date> 01-01-1997 Number Registered:

Training Location> Chicago

Class> 1

Training Information

Trainer: Chicago Staffed

Name: JONES, JERRY

Days: 3.0

Coordinator

Coordinator: HR Classes

Name: AUSTIN, STEVEN

Phone: 4541865 Ext: 1121

FAX:

Set Up Time/Location Class Costs

See also:

■ Scheduling class trainers/coordinators ***(on page 87)***

For an explanation of scheduling class trainers/coordinators.

Setting up class costs (optional)

To record class costs for a training class, follow these steps:

☞ *You may skip steps 1 and 2 if you have just completed the setup of a new class and are still displaying the Class Schedule: Trainer/Coordinator form (13RSCR).*

1. Access the Class Schedule form (13RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Classes
Task: Setup or Maintain Class

For practice, access the Class Schedule form (13RSCR).

2. Select a training course

Access the selections list by clicking on the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Human Resource Mgmt' dated '01-01-1997'.

3. Click the Class Costs command button

Click the Class Costs command button to access the Class Costs form panel. The Course, Start Date, Training Location, and Class sequence number are carried over from the Set Up form panel. None of the remaining text boxes on this panel are required.

For practice, click the Class Costs command button.

4. Select up to five Class Cost Categories

Cost categories are Equipment, Individual, Miscellaneous, Operating, Participant, and Per Head. Select each category from the Category option lists. A category is required if a Type or Cost Amount will be entered

Equipment, Individual, and Operating are typical class-level categories. Per Head and Participant indicate employee-level costs.

For practice, select 'Equipment'.

5. Select up to five associated Class Costs Types

Select each cost type. Examples of cost types are Overhead Projector and Large Monitor rental.

For practice, select 'Overhead Projector'.

6. Type up to five associated cost amounts

Type the associated cost using two decimal places. The Category, Type, and Cost Amount on each line are tied together and define a cost description and amount.

For practice, type '150.00'.

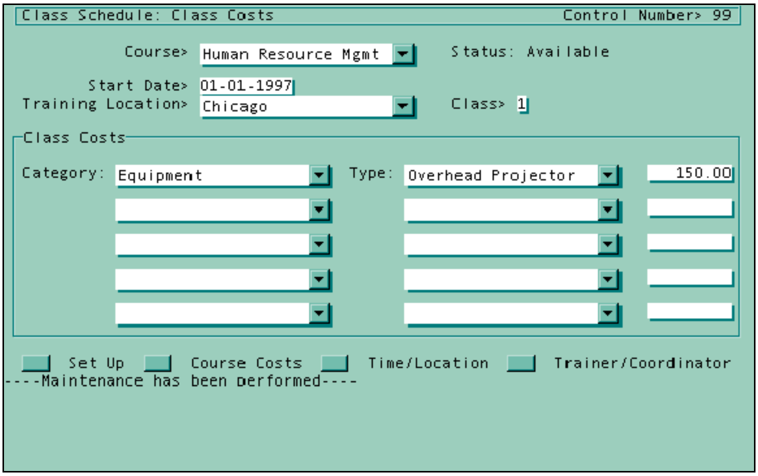
7. Click Save or press Enter

Class costs are set up and the following message is displayed:

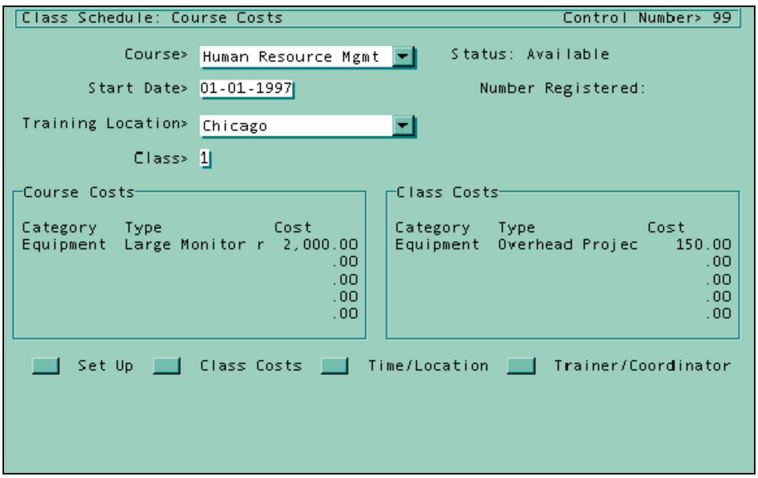
'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



Clicking the Course Costs command button at the bottom of this form panel returns you to another form panel in Display mode that displays all costs recorded at the course and class levels as of the class start date.



See also:

■ Class costing options ***(on page 88)***

For an explanation of class costing options.

Changing class details (optional)

To change class details, follow these steps:

1. Access the Class Schedule form (13RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Classes
Task: Setup or Maintain Class

For practice, access the Class Schedule form (13RSCR).

2. Select a training course

Access the selections list by clicking on the Selections button on the toolbar. Then double-click the appropriate training course.

For practice, click the Selections button on the toolbar and select 'Human Resource Mgmt' dated '01-01-1997'.

3. Access the text box(s) to change

Select the text box or text boxes you want to change and enter the new information.

For practice, change the Maximum Number Of Students to '010'.

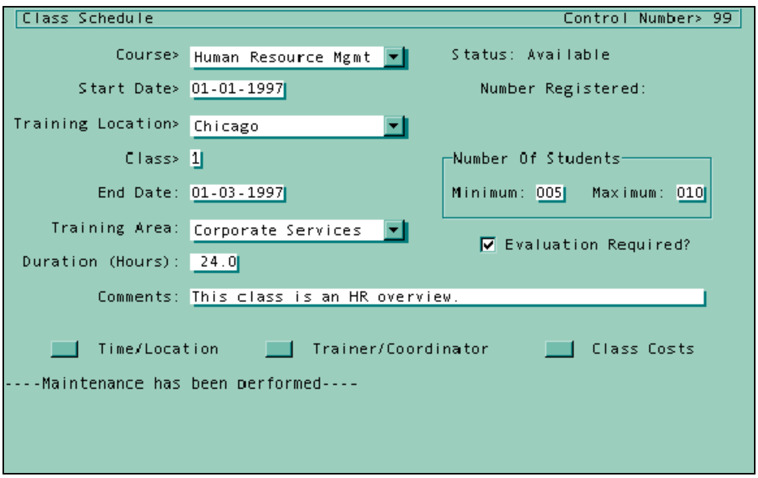
4. Click Save or press Enter

The record is changed and the following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



Copying, canceling, and transferring a class (optional)

To copy, cancel, or transfer a class, follow these steps:

☞ *A class must already exist for it to be canceled, transferred, or copied from. For a class to be copied or transferred to, it can not already exist.*

1. Access the Class Maintenance Facility form (18RSCR)

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Setup and Maintain Classes
Task:	Copy, Cancel or Transfer a Class

For practice, access the Class Maintenance Facility form (18RSCR).

2. Select the Course

Select the appropriate course

As an alternative, select the List Course Options option in the Course Codes option list (TR33) and then click Save or press Enter to display a list of course options and their descriptions. Select a course code from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

3. Enter the Start Date

Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

After selecting a course, you can enter a question mark (?) in the Start Date text box and then press Enter to access the Course/Class selections. You can then select a course/class from this menu and return to this form. The Start Date, Training Location, and Class sequence number text boxes will be automatically filled in.

For practice, type '01-01-1997'.

4. Select the Training Location

Select the location.

For practice, select 'Chicago'.

5. Enter the Class

Type the sequence number associated with the training class in the Class text box.

For practice, type '1'.

6. Click the Cancel, Transfer, or Copy option button

Click the action to be taken on the existing class.

For practice, click the Copy option button.

7. If transferring or copying, enter data in at least one of these text boxes: New Date, New Location, and New Class

The New Date text box is the new date for the training class. The New Location text box is the new location for the training class. The New Class text box value identifies multiple training classes on the same date.

Any text box that is left blank defaults to the current information for the class.

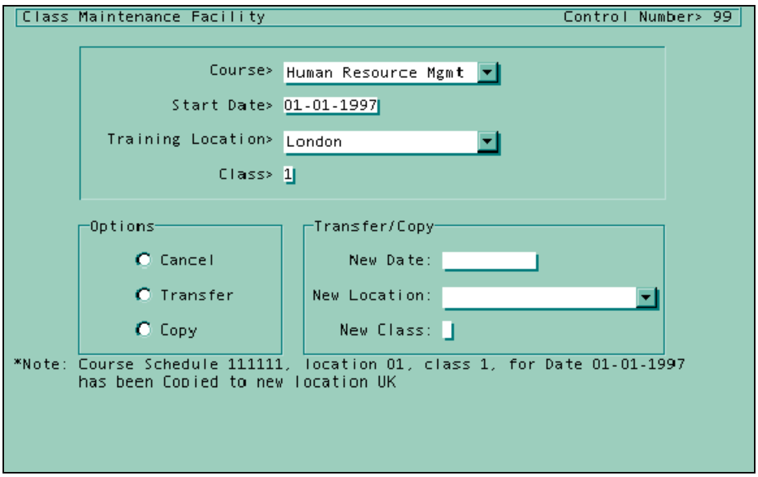
For practice, select 'London' in the New Location list box.

8. Click Save or press Enter

An informative message is displayed after the class has been successfully copied, canceled, or transferred. When the form is executed, the class is displayed with its new information.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Types of class maintenance and their results ***(on page 89)***

For an explanation of the types of class maintenance and their results.

Notifying students of a class cancellation

To produce a list of enrolled students when an entire class has been canceled using the Class Cancellation report (31RRPT) , complete the report schedule by entering the following report parameters:

☞ *This report is run after the Class Maintenance Facility form (18RSCR) is processed to cancel the whole class. Each employee is reported separately. There are no totals reported. Terminated employees are not reported.*

Note: Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.

1. Select the Course (required)

Select the course on which to report.

For practice, select 'Human Resource Mgmt'.

2. Enter the Class Start Date (required)

Enter the class start date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

For practice, type '01-01-1997'.

3. Select the Training Location (required)

Select the training location.

For practice, type 'Chicago'.

4. Enter the Class (required)

Type the class sequence number in the Class text box.

For practice, type '1'.

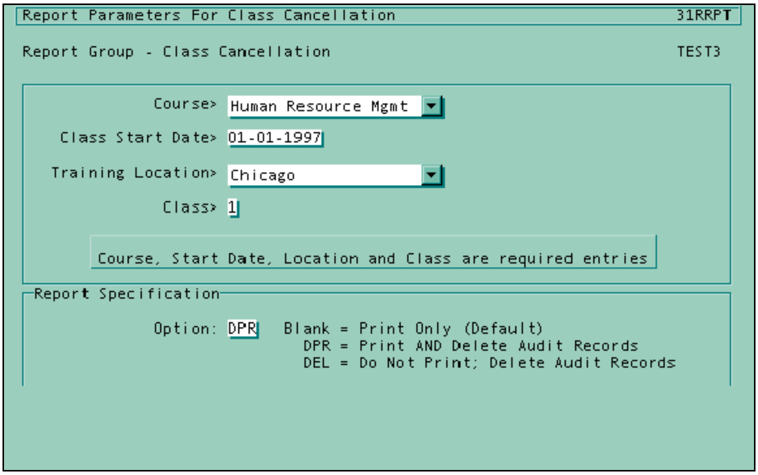
5. Enter the Report Specification Option

Type 'DPR' (to print the report and delete the registration records for the class) or 'DEL' (to delete the registration records for the class without printing the report).

Leave this text box blank to produce the report only.

For practice, type 'DPR'.

When completed, the report parameters may look similar to the example that follows:



6. Click Save or press Enter

Once it has been processed, this report produces a form to inform registered class participants that their class has been canceled.

For practice, click Save or press Enter.

See also:

- Types of class maintenance and their results ***(on page 89)***
For an explanation of the types of class maintenance and their results.

- Class Cancellation report (31RRPT ***(see "Report Quick Reference" on page 243))***
For a description of this report and its business uses.

Checking what classes have been setup - online - optional

You can display all upcoming classes, classes for a specific course, classes as of a specific date, classes at a specific training location, or any combination of these. Follow these steps to review available classes online using the Training Schedule form (53RSCR):

1. Access the Training Schedule form (53RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Classes
Task: Check What Classes are Setup

For practice, access the Training Schedule form (53RSCR).

2. Select the Course (required)

Select the training course.

As an alternative, select the List Course Options option in the Course Codes option list (TR33) and then click Save or press Enter to display a list of course options and their descriptions. Select a course code from the list, then click Save or press Enter.

If this list box is left blank, all courses are selected.

For practice, select 'Human Resource Mgmt'.

3. Type a Start Date (optional)

Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

After selecting a course, you can enter a question mark (?) in the Start Date text box and then press Enter to access the Course/Class selections. You can then select a course/class from this menu and return to this form. The Start Date and Training Location text boxes will be filled in automatically.

If this date is left blank, the current date is used.

For practice, select '01-01-1997'.

4. Select a Training Location (optional)

Select a training location.

If this list box is left blank, all locations are displayed.

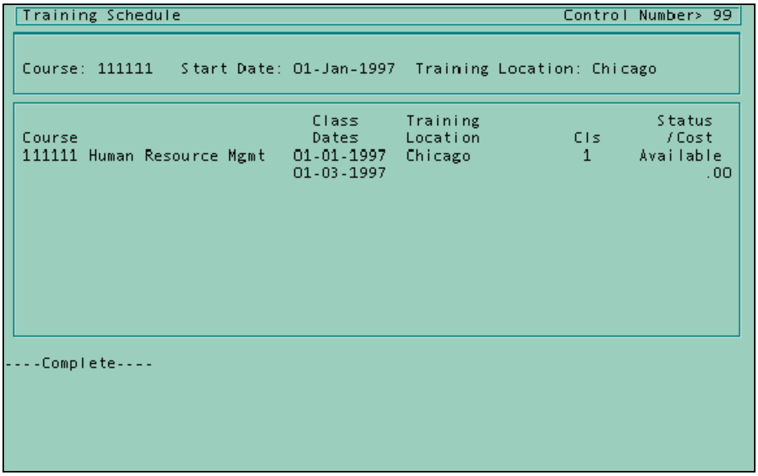
For practice, select 'Chicago'.

5. Click Save or press Enter

A schedule of upcoming training classes is displayed on the form.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:


Training Schedule Control Number> 99

Course: 111111 Start Date: 01-Jan-1997 Training Location: Chicago

Course	Class Dates	Training Location	Cls	Status /Cost
111111 Human Resource Mgmt	01-01-1997 01-03-1997	Chicago	1	Available .00

----Complete----

See also:

- Definition of a training class ***(on page 83)***

For an explanation of a training class.

Checking what classes have been set up - using a report - optional

To check the training schedule on a paper report using the Training Schedule report (29RRPT) , complete the report schedule by entering the following report parameters:

Each Training Location is reported separately. There are no totals reported. Canceled classes are not reported.

Note: *Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.*

1. Enter the From (date) (optional)

Type the class start date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

If this text box is left blank, the system date is used.

For practice, type '01-01-1997'.

2. Enter the To (date) (optional)

Type the class end date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

If this text box is left blank, all classes equal to or later than the From date are reported.

To report on classes from only one date, type the From date in both the From and To parameters.

For practice, leave this text box blank.

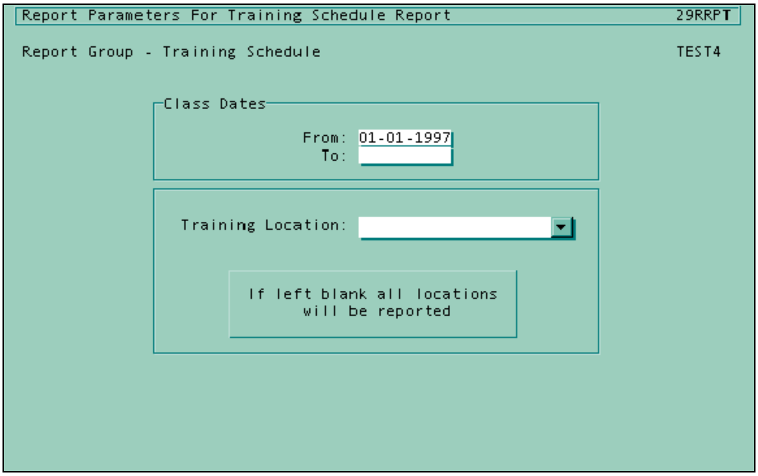
3. Select the Training Location (required)

Select the training location.

If this list box is left blank, all training locations are reported.

For practice, leave this list box blank.

When completed, the report parameters may look similar to the example that follows:



4. Click Save or press Enter

Once it has been processed, this report provides a schedule of classes that have been scheduled for a training location.

For practice, click Save or press Enter.

See also:

■ Definition of a training class ***(on page 83)***
For an explanation of a training class.

■ Training Schedule report (29RRPT ***(see "Report Quick Reference" on page 243))***
For a description of this report and its business uses.

Extended Practice

1. Set up a training class with the following characteristics:

   - Course of 'Flex Benefits'
   - Start Date of 'January 14, 1997'
   - Training Location of 'Chicago'
   - Class '1'
   - End Date of 'January 15, 1997'
   - Select 'Evaluation Required'

The remaining text boxes on this panel will populate from the Course Directory form (10RSCR).

Time and Location

- Days Scheduled of Tuesday and Wednesday
- First day, 9:00 AM to 5:00 PM; Second day, 8:30 AM to 4:00 PM
- Location is Chicago Training Center, Room C

Trainer/Coordinator

- Trainer is Cyborg Systems
- Days = 2
- Coordinator is Cyborg Class Coordinator

Class Costs

- Class Cost for Lunch and Refreshments is 6.00 per head

2. Copy the class you just established to another class on April 1-2, 1997, in New Orleans.

3. Change this New Orleans class in the following manner:

   - Minimum Number of Students is now 5.
   - Classes will be held in Room 3C of the New Orleans Training Center.
   - Wednesday's session is scheduled to end at 5:00 PM.

4. Use the Training Schedule form (53RSCR) to check that the two classes added in this practice session have actually been set up on the file correctly.

Review of Questions Answered

1. What is a class?

2. What four text boxes define a training class?

3. What tool can be used to display all available course options and courses?

4. What are the available class costing options?

5. What types of maintenance can be performed on classes?

CHAPTER 6

Setting Up and Maintaining Training Programs

In This Chapter

Introduction

Training Administration facilitates the setting up and maintenance of training classes to be given on a specific date(s). The information that can be recorded includes class location, class dates, class times, trainer/coordinator information, and class costs.

The information discussed in this section is essential to using Training Administration.

Tasks

You may complete the following tasks to set up training classes. Only the first task is essential. The tasks have been divided into two categories, Set Up Training Classes and Maintain Training Classes.

Prerequisites

Before you can begin to set up training classes, all the following tasks must have been completed.

Organization details

Before any data can be entered, you must ensure that your organization details have been set up.

☞ *Refer to* **Implementing Training Administration** *(on page 23) for more information.*

Training Courses

Before setting up training classes, it is important to enter all available training courses on the system and to set up objectives, prerequisites, and costs for each course.

☞ *Refer to* **Setting Up and Maintaining Training Courses** *(on page 43) for details on setting up and maintaining training courses.*

Training Classes

Before setting up training programs, it is important to enter all available training classes on the system and to set up the Time/Location, Trainer/Coordinator, and Class Costs for each class.

☞ *Refer to* **Setting Up and Maintaining Training Classe** *(see "Setting Up and Maintaining Training Classes" on page 79)s for details on setting up and maintaining training classes.*

Questions answered

The following questions are answered in this section:

1. What is a class?
2. What four text boxes define a training class?
3. What tool can be used to display all available course options and courses?
4. What are the available class costing options?
5. What types of maintenance can be performed on classes?

Makeup of training programs

A training program is composed of a series of up to 15 training classes that must be successfully completed by an employee. Training programs are set up on the Program Schedule form (15RSCR) and include the following types of information:

- Program Name
- Effective Date
- Description of program
- Up to 15 training classes

Students are registered into classes and programs, but never into courses. All classes within the training program must be set up previously on the Class Schedule form (13RSCR).

See also:

- Setting up a training program ***(on page 117)***

For detailed directions on setting up a training program.

- Modifying a training program ***(on page 119)***

For detailed directions on changing a training program.

- Deleting a training program ***(on page 121)***

For detailed directions on deleting a training program.

☞ *Refer to* **Setting Up and Maintaining Training Classes** *(on page 79) for more information on training classes.*

When to use a training program

A training program is used when a series of classes logically fit together in some way and when the classes must all be completed by a group of your employees.

For example, a training program could be set up to include four introductory classes to HR Management. An employee would have to complete all four classes successfully to complete the training program.

Apply the Concept
Consider whether your company would need to set up training programs. How would this help your employees? How would it help management?

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

Tasks

Setting up a training program

To set up a training program, follow these steps:

1. Access the Program Schedule form (15RSCR)

Access this form by making the following selection from the Navigator:

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Classes
Task: Setup/Maintain A Program

For practice, access the Program Schedule form (15RSCR).

2. Click the Clear button

To avoid copying pre-existing information, click the Clear button on the toolbar to clear the text boxes on the form.

For practice, click the Clear button on the toolbar.

3. Select the Program

Select the Program.

For practice, select 'HR Mgmt Program'.

4. Enter the Effective Date

Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere). Subsequent student enrollments must match this date.

For practice, type '08-01-1994' (US and Canada) or '01-08-1994'(elsewhere).

5. Enter a Description

Type an up-to-50-character description of the training program.

For practice, type 'This program is comprised of HR Mgmt classes'.

6. Select the Scheduled Classes

Assign up to 15 scheduled classes to the program.

Assign classes 1 through 5 on this panel and 6 through 10 and 11 through 15 on other form panels. After assigning Classes on the first panel, use the command buttons that display at the bottom of the form to access the other panels.

For practice, select 'Human Resource Mgmt' in the first Scheduled Classes text box.

7. Enter the Start

Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Alternatively, after selecting a course, type a question mark (?) in the Start text box and then press Enter to access the Course/Class selections. Then select a course/class from this menu and return to this form. The Start, Training Location, and Class text boxes will be filled in automatically.

For practice, type '10-01-1994' (US and Canada) or '01-10-1994' (elsewhere) in the first Start text box.

8. Select the Training Location

Select the location at which the training will be held.

For practice, select 'Chicago' in the first Training Location text box.

9. Enter the Class

Type the class sequence number for the training class.

For practice, type '1' in the first Class text box.

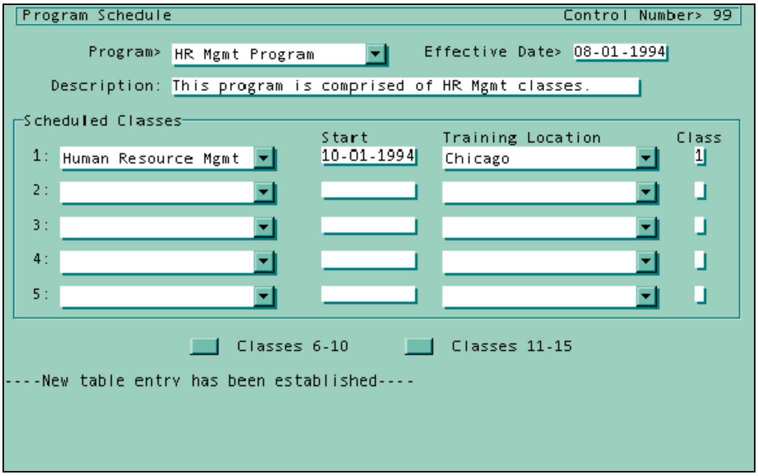
10. Click Save or press Enter

The program is set up and the following message is displayed at the bottom of the form:

'—New table entry has been established—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Makeup of training programs ***(on page 115)***

For an explanation of the makeup of training programs.

Modifying a training program

You can modify training programs by adding more classes to your programs (up to 15). To add classes, follow these steps:

1. Access the Program Schedule form (15RSCR)

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Setup and Maintain Classes
Task:	Setup/Maintain A Program

For practice, access the Program Schedule form (15RSCR).

2. Select a program

Access the selections list by clicking on the Selections button on the toolbar. Then double-click the appropriate program.

For practice, click the Selections button on the toolbar and then select 'HR Mgmt Program' with an Effective date of '08-01-1994'(US and Canada) or'01-08-1994'(elsewhere).

3. Add a training class to the program

Assign a training class to the program by selecting a class from the next available scheduled classes list box.

For practice, select 'Position Management' in the second Scheduled Classes list box.

4. Enter the Start

Type the start date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Alternatively, after selecting a course, type a question mark (?) in the Start text box and then press Enter to access the Course/Class selections. Then select a course/class from this menu and return to this form. The Start, Training Location, and Class text boxes will be automatically filled in.

For practice, type '09-10-1994'(US and Canada) or '10-09-1994'(elsewhere) in the second Start text box.

5. Select the Training Location

Select the location for the added class.

For practice, select 'Chicago' in the second Training Location text box.

6. Enter the Class

Type the sequence number for the added training class.

For practice, type '2' in the second Class text box.

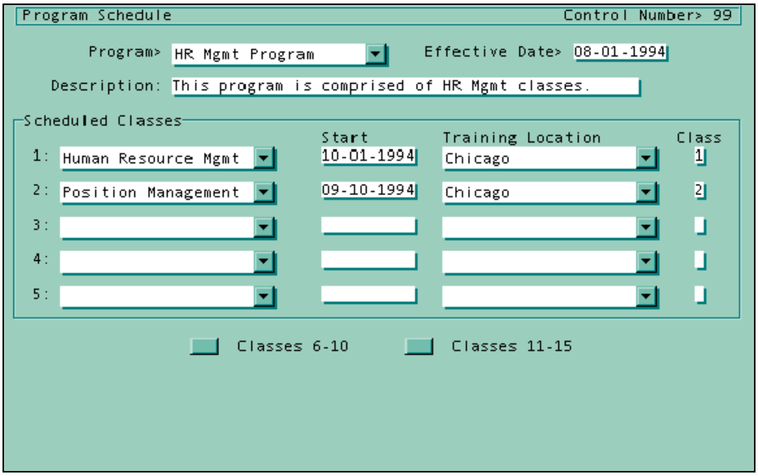
7. Click Save or press Enter

The training program is modified and the following message is displayed:

'—Maintenance has been performed—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:


Program Schedule   Control Number> 99

Program> HR Mgmt Program   Effective Date> 08-01-1994

Description: This program is comprised of HR Mgmt classes.

Scheduled Classes

		Start	Training Location	Class
1:	Human Resource Mgmt	10-01-1994	Chicago	1
2:	Position Management	09-10-1994	Chicago	2
3:				
4:				
5:				

Classes 6-10   Classes 11-15

See also:

- Makeup of training programs ***(on page 115)***

For an explanation of the makeup of training programs.

Deleting a training program

To delete a training program, follow these steps:

1. **Access the Program Schedule form (15RSCR)**

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Setup and Maintain Classes
Task:	Setup/Maintain A Program

For practice, access the Program Schedule form (15RSCR).

2. **Select the program to be deleted**

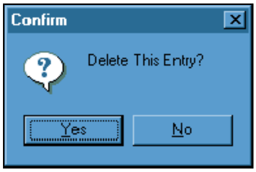
Access the selections list by clicking on the Selections button on the toolbar. Then double-click the program to be deleted.

For practice, click the Selections button on the toolbar and then select 'HR Mgmt Program' dated '08-01-1994'(US and Canada) or '01-08-1994'(elsewhere).

3. **Click the Del Entry button**

Delete the entry by clicking on the Del Entry button on the toolbar.

A Confirm dialog box displays.



For practice, click the Del Entry button.

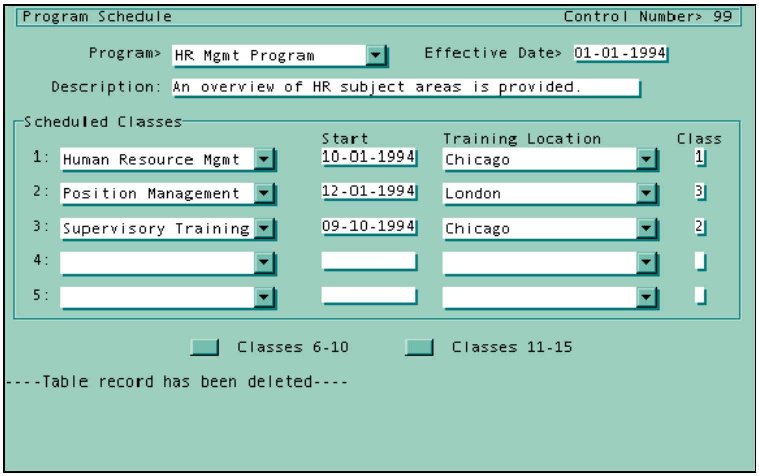
4. **Click the Yes command button**

Confirm the deletion by clicking on the **Y**es command button.

The message '—Table record has been deleted—' displays at the bottom of the form. The form displayed is the first form on the selections list.

For practice, click the Yes command button.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Makeup of training programs ***(on page 115)***

For an explanation of the makeup of training programs.

Extended Practice

1. Set up a training class with the following characteristics:

   - Course of 'Flex Benefits'
   - Start Date of 'January 14, 1997'
   - Training Location of 'Chicago'
   - End Date of 'January 15, 1997'
   - Select 'Evaluation Required'

   The remaining text boxes on this panel will populate from the Course Directory form (10RSCR).

   Time and Location

   - Days Scheduled of Tuesday and Wednesday
   - First day, 9:00 AM to 5:00 PM; Second day, 8:30 AM to 4:00 PM
   - Location is Chicago Training Center, Room C

   Trainer/Coordinator

   - Trainer is Cyborg Systems
   - Days = 2
   - Coordinator is Cyborg Class Coordinator

   Class Costs

   - Class Cost for Lunch and Refreshments is 6.00 per head

2. Copy the class you just established to another class on April 1-2, 1997, in New Orleans.

3. Change this New Orleans class in the following manner:

   - Minimum Number of Students is now 5.
   - Classes will be held in Room 3C of the New Orleans Training Center.
   - Wednesday's session is scheduled to end at 5:00 PM.

4. Use the Training Schedule form (53RSCR) to check that the two classes added in this practice session have actually been set up on the file correctly.

Review of Questions Answered

1. What is a class?

2. What four text boxes define a training class?

3. What tool can be used to display all available course options and courses?

4. What are the available class costing options?

5. What types of maintenance can be performed on classes?

PART 3

Entering Employee Training Data

In This Section

CHAPTER 7

Requesting Training for an Employee

In This Chapter

Introduction

Training Administration facilitates the entry of requests for employee training (required or elective) and the administration of those requests. This optional feature is designed to enable a training administrator or manager to identify the best course available for an employee to take when a training request is made on the employee's behalf. For example, a line manager may authorize training that meets certain objectives, but may not know what specific courses are available. Likewise, prerequisites for a particular course may not be fully known at the time of the request.

An authorized request can go to a training administrator who reviews it, identifies the course or courses that fit the objectives specified, checks to see if the prerequisites have been met, records the need for the employee to take the courses(s), and ultimately registers the employee for it.

In some organizations, employees can request certain types of elective training directly with a training administrator. Such training is not required for the job and may not need to have supervisory approval. Again, a training administrator can take such requests, match the employee's need to the type of courses available, determine that the prerequisites have been met, record the elective training desired, and complete the actual registration.

☞ *If logging training requests is not required in your organization, read only the section called 'Methods of checking training requests' and then read* **Registering an Employee for Training** *(on page 151).*

Tasks

You can complete the following tasks to process a training request for an employee:

- Identifying the most suitable course for an employee
- Checking the prerequisites for a training course on line by course
- Checking the prerequisites for a training course - using your chosen method
- Entering a request for training
- Checking training requests - online by course
- Checking training requests - online by class
- Checking training requests - on a report by course
- Checking training requests - on a report by employee

Prerequisites - Requesting Training for an Employee

Before you request training for an employee, the following task must have been completed.

Organization details

Before any data can be entered, you must ensure that your organization details have been set up.

☞ *Refer to* **Implementing Training Administration** *(on page 23) for more information.*

Training Courses

Before requesting training for an employee, it is important that all available training courses have been entered on the system and that the objectives, prerequisites, and costs for each course have been set up.

☞ *Refer to* **Setting Up and Maintaining Training Courses** *(on page 43),* **Setting Up and Maintaining Training Classes** *(on page 79), and* **Setting Up and Maintaining Training Programs** *(on page 113) for details on setting up and maintaining training courses, classes, and programs.*

See also:

- Types of course prerequisites and their uses ***(on page 132)***

For an explanation of types of course prerequisites and their uses.

Employee details

Before you can process their training requests, all employees for whom you have training requests must be set up as employees on the system.

☞ *Refer to the Using Human Resources Administration documentation for information about setting up an employee record.*

Questions answered

The following questions are answered in this Section:

1. When should the Training Request Facility be used?
2. How are training objectives used to identify suitable training courses?
3. What are course prerequisites and how are they used?
4. What methods of checking training requests are available?

Uses of the Training Request Facility

It is not essential to enter training requests. If training requests are not entered first, it means that registering an employee for a training class becomes the initial entry task. The Objective To Course Match form (56RSCR) (also known as the Training Request Facility) is, however, very useful if, in your organization, a training administrator is relied upon to help determine the best course fit for an employee based on certain criteria, and then record the needed training before actually processing the registration.

For example, if line managers initiate training requests on behalf of their employees, they need to either identify the type of course they wish an employee to attend or state the objectives they hope the employee will achieve. A training administrator may need to match these stated objectives to available courses and/or check that prerequisites are met before actually recording the employee's required training. The use of the Objective To Course Match form (56RSCR) (also known as the Training Request Facility) is simply a more structured approach to matching training needs with courses that will meet those needs and/or facilitating the prerequisite determination before recording the training requirement for an employee.

See also:

- Identifying the most suitable course for an employee (optional) ***(on page 136)***

For detailed directions on choosing courses for an employee.

Apply the Concept

Consider the way employee training is managed in your organization and determine whether it would be useful for you to use the Objective To Course Match form (56RSCR) (also known as the Training Request Facility).

Use of course objectives to identify suitable training courses

To enable staff to find the best course available for an employee, training objectives are matched with course objectives. For this process to be effective, it is important that all courses are set up with a full range of identified training objectives.

☞ *Refer to* **Setting Up and Maintaining Training Courses** *(on page 43) for more information on setting up training course objectives.*

The list of training objectives that have been identified for the available courses is displayed in the Objective list box on the Objective To Course Match form (56RSCR). Selecting a training objective from this form allows the system to search for the appropriate training course that satisfies the training objective. This is the only way to search for suitable training course(s) without knowing the name of the training course you wish the employee to attend.

Therefore, when setting up the training objectives, it is important to define them as clearly as possible to avoid confusion. It may be worthwhile to describe the training objectives for each training course in a number of different ways to ensure that people searching for a desired training objective can find what they are looking for.

If you do not want to use training objectives to define suitable training courses, it is not possible to use the Objective To Course Match form (Training Request Facility) (56RSCR).

See also:

- Identifying the most suitable course for an employee (optional) ***(on page 136)***
For detailed directions on choosing courses for an employee.

Apply the Concept
Assume one of the courses your organization offers to employees is 'Using Word for Windows'. What training objectives would you set up for this course?

Types of course prerequisites and their uses

Using the course prerequisite feature to control training requests and training registrations is optional.

Types of prerequisites

A prerequisite may be attendance of another course, the mastery of certain skills and abilities, or anything that is measurable, such as length of experience.

Options for checking that prerequisites are met

If your organization has decided to use the course prerequisite feature, it will be necessary—once a training request has been made or before a training registration has been processed—to check that the employee satisfies the prerequisites.

☞ *Refer to* **Setting Up and Maintaining Training Courses** *(on page 43) for more information on use of the prerequisite feature.*

The system will not automatically check to see that an employee satisfies the specified prerequisites. Checking, therefore, will be a manual task. Because a prerequisite is user-definable, it will be up to your organization to determine how best to check that prerequisites are met before finalizing a training request or a training registration.

Some examples of prerequisite information that can be maintained include the following:

Type of Prerequisite	**Where information is held on *The Solution Series/ST***
Education qualification	Formal Education form (30-SCR)
Attendance of a course	Training Scheduled/Taken form (31-SCR) Training Results/History form (30RSCR)
Qualification	Formal Education form (30-SCR) Skills And Competencies form (33-SCR) Certificates, Licenses And Permits form (28-SCR) Professional Association Memberships form (29-SCR)
Level of Experience	Skills And Competencies form (33-SCR)
Skill	Skills And Competencies form (33-SCR)

When to check that prerequisites have been met

Your organization will need to make a decision about when the prerequisites are checked. You may wish to check them as soon as a training request is received or just before a registration is processed.

See also:

- Checking the prerequisites for a training course - online by course - optional ***(on page 138)***
- Checking the prerequisites for a training course - using your chosen method ***(on page 139)***

For detailed directions on checking course prerequisites.

Entering training requests

The Training Required form (31RSCR) is used to record an employee's need for a training course. The information on this form can be entered or deleted manually, or is maintained automatically by the system for internal training classes under the following circumstances:

- Created/deleted by the Class Registration form (20RSCR) when a registration is canceled.
- Created by the Training Results/History form (30RSCR) when an employee has failed a class.
- After an employee successfully completes a training class, the training-required record is automatically deleted from the system.

The Registration Status display on the form shows 'Registered' or 'No Status', which is based on a system examination of the employee-level registration record to determine if a Course Number match is found. If a match is found, a status of 'Registered' is displayed. If no match is found, 'No Status' is displayed.

See also:

- Entering a request for training ***(on page 139)***

For detailed directions on entering training requests.

Methods of checking training requests

A number of facilities allow you to check that training has been requested and entered in Training Administration. You must choose which method is the best one for you. The options are:

Selection Option	**Format**	**Form/Report**
By training course	Online list of employees	Training Required inquiry form (33RSCR)
By training course	Hard copy report of employees	Training Courses Needed By Course report (47RRPT)
By class	Online list of employees	Class Registration/ Cancellation form (20RSCR)
By employee	Hard copy report of courses	Training Courses Needed By Employee report (48RRPT)

The first two options are the most popular. However, the third option is useful if, after checking the requests, you want to process them and register the employee using the Class Registration/Cancellation form (20RSCR).

☞ *Refer to* **Registering an Employee for Training** *(on page 151) for more details on the Class Registration/Cancellation form (20RSCR).*

The last option could be useful if, for example, you need further authorization from the employee's line manager before processing the request. This report could be distributed to the appropriate line managers for checking and approval.

See also:

- Checking training requests - online by course ***(on page 141)***
- Checking training requests - online by class ***(on page 142)***
- Checking training requests - on a report by course ***(on page 144)***
- Checking training requests - on a report by employee ***(on page 146)***

For detailed directions on entering training requests.

Apply the Concept
Consider how you intend to use the Objective To Course Match form (56RSCR) (also known as the Training Request Facility) in your organization. Who will check training requests? Which facility would be most useful for checking training requests?

Detailed Directions

This section provides detailed instructions for the tasks discussed in this Section.

Tasks

Identifying the most suitable course for an employee (optional)

To find a course that matches a training objective, follow these steps:

1. Access the Objective To Course Match form (56RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Enter Employee Training Data
Task: View Suitable Courses for Employee

For practice, access the Objective To Course Match form (56RSCR).

2. Select the Objective

Select the training objective to be achieved. If the training objective is not listed, then no courses are available with that training objective identified.

For practice, select 'Gain General Skills'.

3. Enter the time period over which you are searching for appropriate training

- Type the start and end dates in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).
- Either of the date text boxes can be left blank.
- If the start date is left blank, today's date is used as the default. If the end date is left blank, all courses satisfying the training objective will be listed.

For practice, leave the date text boxes blank.

4. Click Save or press Enter

All courses that have objectives recorded on the Course Directory form (10RSCR) that match the objective entered here will be displayed at the bottom of the form. All scheduled classes for each selected course will be displayed for the time period entered. The Cost includes all Cost Categories of Equipment, Operating, and Miscellaneous.

The word '—Complete—' is displayed at the end of the list.

If the list of courses is too long to fit on the form, press Enter to scroll through the remainder of the list.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:

```
Objective To Course Match

                    Objective> Gain General Skills
                        Start:
                          End:

                                        Class      Training              Status
Course                                  Dates      Location        Cls   /Cost
111111   Human Resource Mgmt         01-01-1997 Chicago           1    Available
                                     01-03-1997                           2,150.00

                                     01-01-1997 London            1    Available
                                                                          2,150.00

S00001   Supervisory Training         No class scheduled for this course

----Complete----
```

See also:

- Uses of the Training Request Facility ***(on page 130)***

For an explanation of the uses of the Training Request Facility.

- Use of course objectives to identify suitable training courses ***(on page 131)***

For an explanation of the use of course objectives to identify suitable training courses.

Checking the prerequisites for a training course - online by course - optional

To identify course prerequisites online using the Course Directory form (10RSCR), follow these steps:

1. Access the Course Directory form (10RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Enter Employee Training Data
Task: Check Course Prerequisite

For practice, access the Course Directory form (10RSCR).

2. Select a training course

Access the selections list by clicking on the Selections button on the toolbar. Then double-click the appropriate training course.

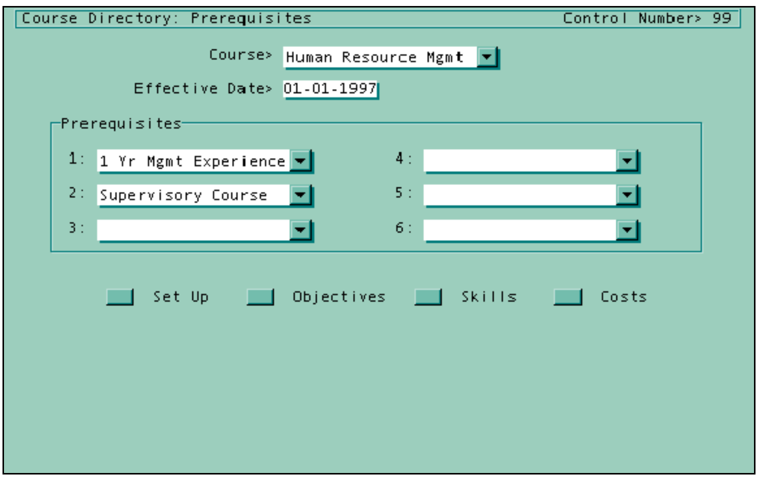
For practice, click the Selections button on the toolbar and then select 'Human Resource Mgmt' dated '01-01-1997'.

3. Click the Prerequisites command button

Once the correct course details are displayed, click the Prerequisites command button at the bottom of the form. The Prerequisites panel is displayed.

For practice, click the Prerequisites command button.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Types of course prerequisites and their uses ***(on page 132)***

For an explanation of this identifier.

Checking the prerequisites for a training course - using your chosen method

The action you take to check that the employee meets the prerequisites of the course will depend on the type of prerequisites set. The following are three examples of the types of prerequisites and how to check them.

Type of prerequisite	**Where information is held on the system**
Education qualification	Formal Education form (30-SCR)
Course attendance	Training Scheduled/Taken form (31-SCR) Training Results/History form (30RSCR)
Qualification	Formal Education form (30-SCR) Skills And Competencies form (33-SCR) Certificates, Licenses, And Permits form (28-SCR) Professional Association Memberships form (29-SCR)
Level of experience	Skills And Competencies form (33-SCR)
Skill	Skills And Competencies form (33-SCR)

Refer to the conceptual information about course prerequisites and their uses to determine how your organization is going to check prerequisites.

Entering a request for training

To request training for an employee, use the Training Required form (31RSCR) and follow these steps:

1. Access the Training Required form (31RSCR) for the specified employee

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Enter Employee Training Data
Task: Enter A Request for Training

For practice, access the Training Required form (31RSCR) for employee '2005'.

2. Select the Course

Select the appropriate course.

As an alternative, select the List Course Options option in the Course option list and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

3. Select the Type (optional)

Select the type of requirement, for example, required or elective.

For practice, select 'Elective'.

4. Enter the Date Required

Type the date by which the training is required, or the scheduled date of the course, if known. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

For practice, type '03-01-1997'(US and Canada) or '01-03-1997'(elsewhere).

5. Select the Reason

Select the reason for the training request, for example, Acquire competency.

For practice, select 'Training plan'.

6. Leave the Status list box blank

The Status list box on this form is used to identify any unusual statuses for a training request. The status definitions are as follows:

Status	**Meaning**
None	A normal request
Class Canceled	The class has been canceled
Class Incomplete	The employee failed to complete the course
Employee Canceled	The employee registration has been canceled
Employee Failed	The employee failed the course

These statuses are maintained by the system automatically, except for the 'Class Incomplete' status, which requires manual entry.

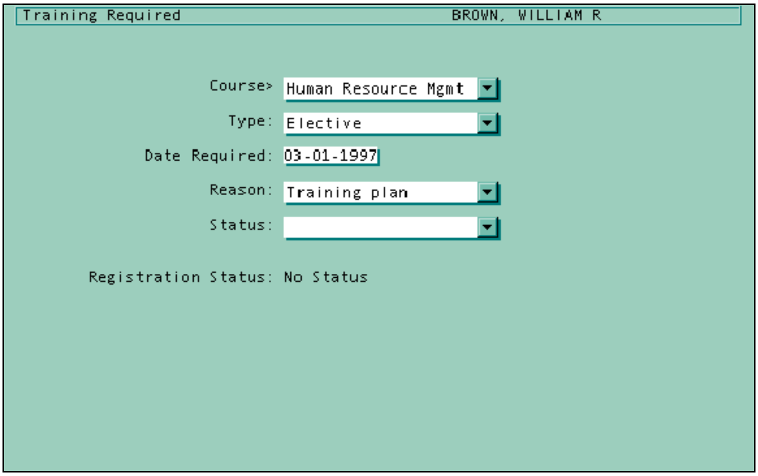
For practice, leave this list box blank.

7. Click Save or press Enter

The training request is created. If a Course Number match is found, a registration status of 'Registered' is displayed. If no Course Number match is found, 'No Status' is displayed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Entering training requests ***(on page 134)***

For an explanation of entering training requests.

Checking training requests - online by course

To view training requests online by course using the Training Required inquiry form (33RSCR), follow these steps:

1. Access the Training Required inquiry form (33RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Enter Employee Training Data
Task: Check Training Required

For practice, access the Training Required inquiry form (33RSCR).

2. Select the Course

Select the course for which you wish to check training requests.

As an alternative, select the List Course Options option in the Course option list and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list.

For practice, select 'Human Resource Mgmt'.

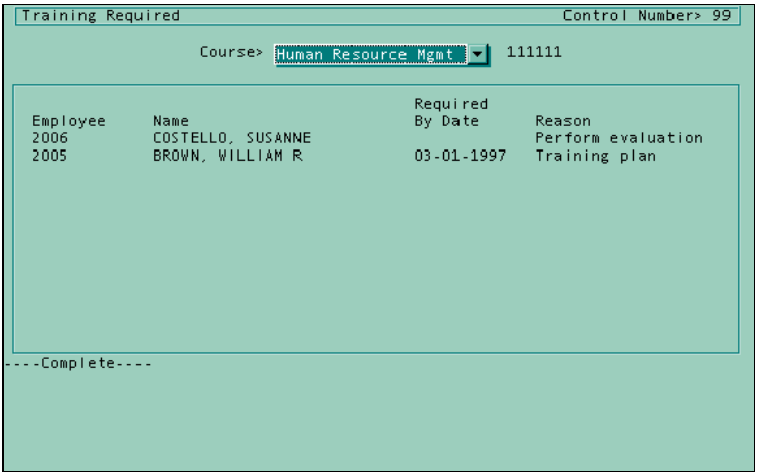
3. Click Save or press Enter

The training requests on file for the course are displayed. The following message is displayed when all the training required has been reported:

'—Complete—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:


Training Required Control Number> 99

Course> Human Resource Mgmt 111111

Employee	Name	Required By Date	Reason
2006	COSTELLO, SUSANNE		Perform evaluation
2005	BROWN, WILLIAM R	03-01-1997	Training plan

----Complete----

See also:

- Methods of checking training requests ***(on page 135)***

For an explanation of this identifier.

Checking training requests - online by class

To view training requests online by class using the Class Registration/Cancellation form (20RSCR), follow these steps:

1. Access the Class Registration/Cancellation form (20RSCR)

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Register an Employee for Training
Task:	Register Employees for Classes

For practice, access the Class Registration/Cancellation form (20RSCR).

2. Select the Course

Select the course you wish to check.

As an alternative, select the List Course Options option in the Course option list and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

3. Enter the Start Date

Type the start date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Alternatively, after selecting a course, enter a question mark (?) in the Start text box and then press Enter to access the Course/Class selections. Then select a course/class and return to this form. The Start Date, Training Location, and Class text boxes will be automatically filled in.

For practice, type '01-01-1997'.

4. Select the Training Location

Select the location.

For practice, select 'Chicago'.

5. Enter the Class

This will normally be '1' unless there are multiple occurrences of the same course on the same day.

For practice, type '1'.

6. Enter the Employee (optional)

If you are using this form to register or cancel a class for a particular employee, type the employee number in the Employee text box.

This text box can be left blank when inquiring about training requests received.

For practice, leave this text box blank.

7. Select the Type

Select an option that indicates whether the student has taken this course as a requirement or as an elective choice. This list box can be left blank when inquiring about training requests received.

For practice, leave this list box blank.

8. Enter the Confirmed (date)

If you are using this form to register an employee in a class, and the registration has been confirmed, type the confirmation date in the Confirmed text box in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

This text box can be left blank when inquiring about training requests received.

For practice, leave this text box blank.

9. Select one of the Options

Select one of the option buttons to register or cancel the class for the employee. If you accidentally select either the Register or Cancel option button and only want to update the form data, select the No Option option button.

Make no selection when inquiring about training requests received.

For practice, make no choice in this group box.

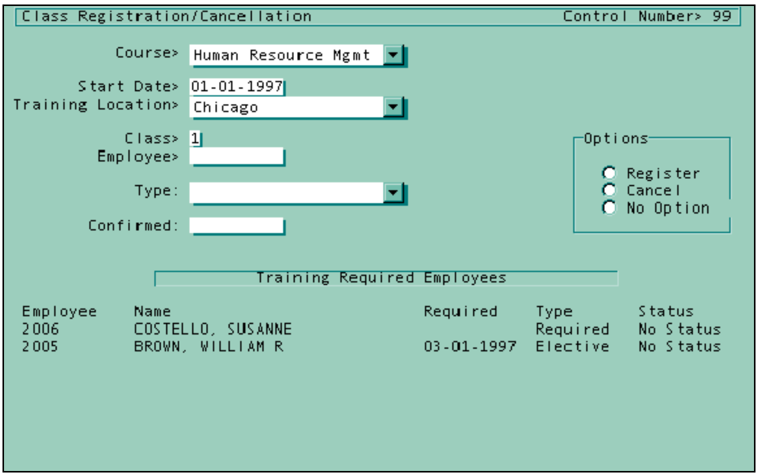
10. Click Save or press Enter

A list of employees who have requested the selected training course is displayed at the bottom of the form. Click Save or press Enter to see additional entries on the list.

☞ *If employees have been wait-listed for the course, their names will be displayed because they take precedence over those who require training.*

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Methods of checking training requests ***(on page 135)***

For an explanation of the methods of checking training requests.

Checking training requests - on a report by course

To view training requests by course on a hard-copy report using the Training Courses Needed by Course report (47RRPT) , complete the report schedule by entering the following report parameters:

Each course is reported separately. No totals are reported. Terminated employees are not reported.

Note: Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.

1. Enter the From (date) (optional)

Type the start date of the period for which you want to report. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, the system date is used.

For practice, type '01-01-1997'.

2. Enter the To (date) (optional)

Type the end date of the period for which you want to report. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, all employees with training required on a date equal to or later than the From date are reported.

To report on training required for a specific date, type the From date in both the From and To text boxes.

For practice, leave this text box blank.

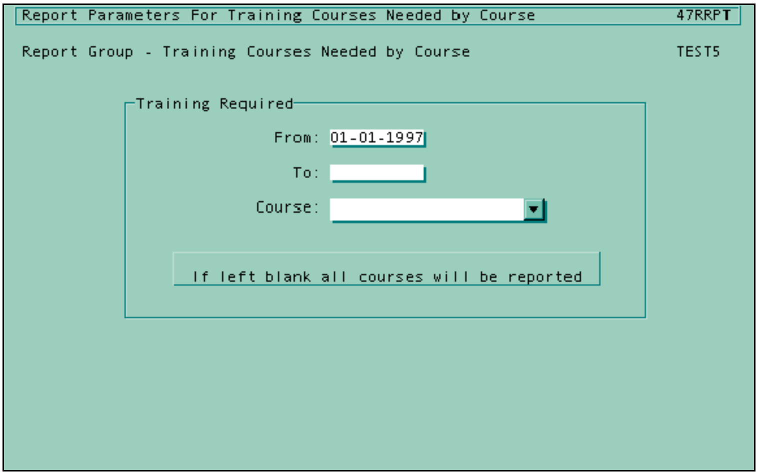
3. Select the Course (optional)

If you require a specific course to be reported on, select the course.

Note: If this list box is left blank, all courses are reported.

For practice, leave this list box blank.

When completed, the report parameters may look similar to the example that follows:



4. Click Save or press Enter

Once it has been processed, this report provides, by course, a list of courses that employees need to take.

For practice, click Save or press Enter.

See also:

- Methods of checking training requests ***(on page 135)***

For an explanation the methods of checking training requests.

Checking training requests - on a report by employee

To view training requests by employee on a hard-copy report, use the Training Courses Needed By Employee report (48RRPT) .

Each employee is reported separately. No totals are reported. Terminated employees are not reported.

Note: Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.

1. Enter the From (date) (optional)

Type the start date of the period for which you want to report. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, the system date is used.

For practice, type '01-01-1997'.

2. Enter the To (date) (optional)

Type the end date of the period for which you want to report. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, all employees with training required on a date equal to or later than the From date are reported.*

To report on training required for a specific date, type the From date in both the From and To text boxes.

For practice, leave this text box blank.

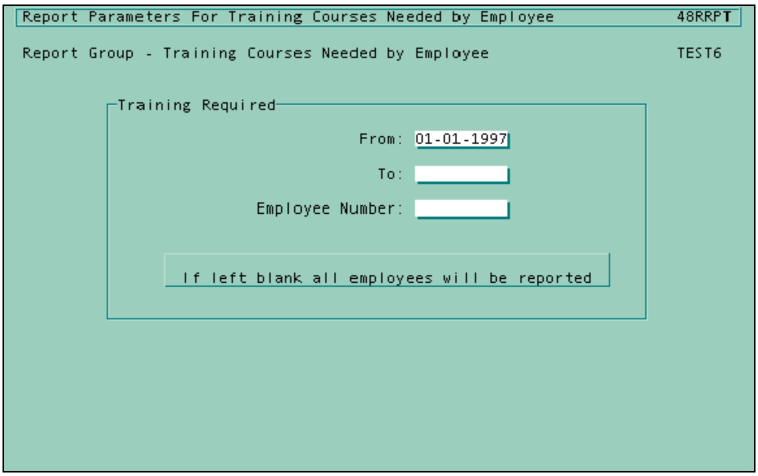
3. Enter the Employee Number (optional)

To report on a specific employee, type the employee number.

Note: *If this text box is left blank, all employees are reported.*

For practice, leave this text box blank.

When completed, the report parameters may look similar to the example that follows:



4. Click Save or press Enter

Once it has been processed, this report provides, by employee, a listing of training courses that employees need to take.

For practice, click Save or press Enter.

See also:

- Methods of checking training requests ***(on page 135)***

For an explanation of the methods of checking training requests.

Extended Practice

1. Identify the best course for Jeanette Isley in organization 999999 based on the details below. Once you have identified the suitable training course, check that she has satisfied any prerequisites, and then enter the training request.

   Facts: Jeanette Isley, Employee 1432, has expressed a desire to learn more about organization structure and managing positions. She already has earned an MBA and has talked to her manager about pursuing an opportunity soon to be available in the HR area that requires knowledge of organizational planning, position tracking, and succession planning. Her manager asked you to review this request and determine what course might be appropriate for Jeanette and also determine whether a class is scheduled before December 31, 1997. Enter the training request for this elective course.

2. Verify that the training request for Jeanette appears on the Training Required inquiry form (31RSCR).

Review of Questions Answered

1. When should the Training Request Facility be used?

2. How are training objectives used to identify suitable training courses?

3. What are course prerequisites and how are they used?

4. What methods of checking training requests are available?

CHAPTER 8

Registering an Employee for Training

In This Chapter

Introduction

Training Administration facilitates the registration of employees for available classes. If a class is full, the employee is added to a waiting list for the next available class.

You can check employee registrations for a class or course, check class availability, and check the employees who are registered for a class.

Tasks

The tasks in this Section are divided into two functions: registering employees for training classes and registering employees for training programs.

Registering employees for training classes

- Checking class availability
- Registering employees for training classes
- Checking class registrations online
- Checking class registrations on a report
- Checking employee registrations online
- Checking employee registrations on a report
- Confirming class registrations - using confirmation letters
- Confirming class registrations - using a report reminder

Registering employees for training programs

- Registering employees for training programs
- Checking program registrations online
- Checking program registrations on a report

Prerequisites

Before you can register employees for training, the following tasks must have been completed.

Organization details

Before any data can be entered, you must ensure that your organization details have been set up.

Training Courses, Classes, and Programs

Before registering an employee for training, it is important to enter all available training courses and classes on the system and to set up the objectives, prerequisites, and costs for each course and class.

☞ *Refer to* **Setting Up and Maintaining Training Courses** *(on page 43),* **Setting Up and Maintaining Training Classes** *(on page 79), and* **Setting Up and Maintaining Training Programs** *(on page 113) for details on setting up and maintaining training courses, classes, and programs.*

Employee details

All employees who are being registered for training must have been set up as employees on the system.

☞ *Refer to the Using Human Resources Administration for information about setting up an employee record.*

Questions answered

The following questions are answered in this Section:

1. How are course and class availability checked?
2. How are training programs administered?
3. What is the waiting list process?
4. How are employee registrations confirmed?

Options for checking class availability

Before registering employees for training classes, it makes sense to determine which classes are available. There are several options for identifying the training courses and classes that are available for employee training. It is possible to review the class costs, time, location, and the number of students permitted to attend a particular class.

It is also possible to review which trainer is responsible for a particular class. This will also identify whether the trainer is internal or external while simultaneously identifying the number of students registered for a class. This functionality allows you to ensure that an employee who is a provider is not registered for two classes at the same time.

See also:

- Checking class availability ***(on page 160)***

For detailed directions on checking class availability.

Options for checking class registrations

There is a facility that enables staff to check the employee registrations for all classes or a particular class. This facility can determine which employees are registered, wait-listed, or both. With this facility it is possible to withdraw an employee from a scheduled class.

See also:

- Class Listing report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Apply the Concept

Consider which options for checking class registrations will be used in your organization. Who will be responsible for this task?

The administration of training programs

Organizations may set up training programs consisting of up to 15 classes. Each class must then be taken by an employee to successfully complete the program.

You may enroll an employee in a program or cancel an employee's registration in a program.

You may list all employees who are registered for a specified program.

You may future-date the starting dates of possible training programs. Future-dated programs may be established and you may enroll employees in them at any time.

The Program Registration/Cancellation form (16RSCR) is used to enroll an employee in a program or cancel an employee's registration in a program.

When an employee is enrolled in a program, the system attempts to register the employee in each of the classes in the program, which are set up on the Program Schedule form (15RSCR). If a class is full, the employee is automatically wait-listed for that class.

When an employee is canceled from a program, the system cancels the employee's registration from all classes that have not been completed.

The class-level processing performed by this form is similar to the processing performed by the Class Registration/Cancellation form (20RSCR). This includes updating the number of seats filled, wait-listing, generating registration numbers, creating or deleting the employee-level registration, and so forth.

See also:

- Registering employees for training programs ***(see "Registering employees for training classes" on page 161)***

For detailed directions on program registration.

- Checking program registrations online ***(on page 177)***
- Checking program registrations on a report ***(on page 178)***

For detailed directions on checking program registrations.

- Student Program Status report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

The waiting list process

When an employee is registered for a class, the status of the class might be full. When a class is full, the employee may be wait-listed.

It may not be appropriate to wait-list every employee who registers for a class that is full. For example, an employee may withdraw from a class on very short notice. To simply enroll the next employee waiting for the class may cause problems if the employee does not work locally or is on vacation.

See also:

- Registering employees for training programs ***(see "Registering employees for training classes" on page 161)***

For detailed directions on class registration.

Options for checking employee registrations

You may inquire on the class or classes within a program in which individual employees are registered, wait-listed, or both.

You may set start and/or end dates for this inquiry. You might use this facility, for example, if an employee is on extended sick leave and you need to cancel the employee's registration on future-dated classes.

See also:

- ***Checking registrations for a training class***
For detailed directions on checking training registrations.

- ***Checking an employee's class registration***
For detailed directions on checking an employee's class registration.

- Employee Training Schedule report ***(see "Report Quick Reference" on page 243)***
For a description of this report and its business uses.

Registration confirmation

Confirmation of an employee being registered in a training class is produced by the use of a report that generates a confirmation letter for the employee.

The confirmation letter details the training class attributes, for example, the class location and dates.

See also:

- Confirming class registrations - using confirmation letters ***(on page 172)***
- Confirming class registrations - using report reminders ***(see "Confirming class registrations - using a report reminder" on page 174)***

For detailed directions on confirming class registrations.

- Class Confirmation report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

- Class Reminder report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Detailed Directions

This section provides detailed instructions for the tasks discussed in this Section.

Tasks

Checking class availability

To check training class availability, follow these steps:

1. Access the Training Schedule inquiry form (53RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Setup and Maintain Classes
Task: Check What Classes are Setup

For practice, access the Training Schedule inquiry form (53RSCR).

2. Select the Course (optional)

Select the course.

As an alternative, select the List Course Options option in the Course option list and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list, then click Save or press Enter.

If this list box is left blank, all the courses are displayed.

For practice, select 'Human Resource Mgmt'.

3. Type the Start Date (optional)

Type the date to start listing upcoming courses in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

If this text box is left blank, the current date is used.

Alternatively, after selecting a course, type a question mark (?) in the Start text box and then press Enter to access the Course/Class selections. Then select a course/class and return to this form. The Start, Training Location, and Class text boxes will be automatically filled in.

For practice, type '01-01-1997'.

4. Select the Training Location (optional)

Select a training location, for example, Sydney.

If this list box is left blank, all locations are reported.

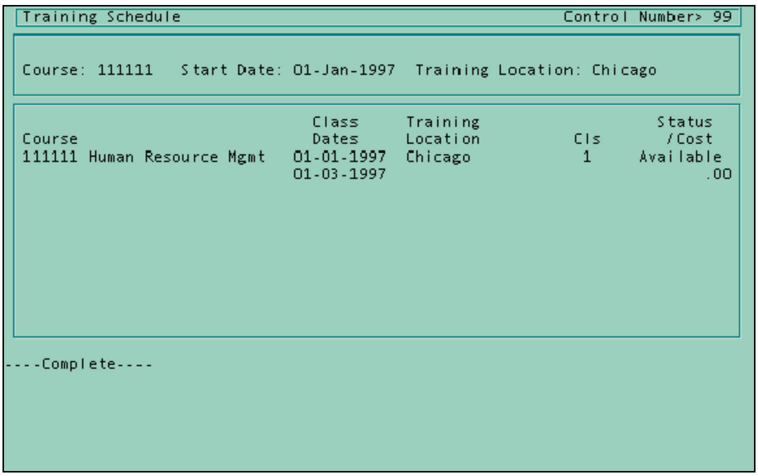
For practice, select 'Chicago'.

5. Click Save or press Enter

The upcoming training schedule information is displayed on the form.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



```
Training Schedule                                          Control Number> 99

Course: 111111   Start Date: 01-Jan-1997  Training Location: Chicago

                             Class      Training                       Status
Course                       Dates      Location           Cls          /Cost
111111 Human Resource Mgmt   01-01-1997 Chicago             1        Available
                             01-03-1997                                    .00

----Complete----
```

See also:

- Options for checking class availability ***(on page 154)***

For an explanation of this identifier.

Registering employees for training classes

To register an employee for a training class, follow these steps:

1. Access the Class Registration/Cancellation form (20RSCR)

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Register an Employee for Training
Task:	Register Employees for Classes

For practice, access the Class Registration/Cancellation form (20RSCR).

2. Select the Course

Select the appropriate course.

As an alternative, select the List Course Options option in the Course option list and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

3. Enter the Start Date

Type the start date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Type a question mark (?) in this text box to access the Course/Class selections. Select a course/class and click Save or press Enter to return to the form. The Start Date, Training Location, and Class text boxes are automatically propagated on this form.

For practice, type '01-01-1997'.

4. Select the Training Location

Select the training location, for example, Sydney.

For practice, select 'Chicago'.

5. Select the Class

This will normally be '1' unless there are multiple occurrences of the same course on the same day.

For practice, select '1'.

6. Enter the Employee (number)

Type the employee number of the person you want to register into the training class.

For practice, type '2010'.

7. Select a Type (optional)

Indicate if the training is Elective or Required.

For practice, select 'Elective'.

8. Type a Confirmed (date) (optional)

Type the registration confirmation date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

For practice, leave this text box blank.

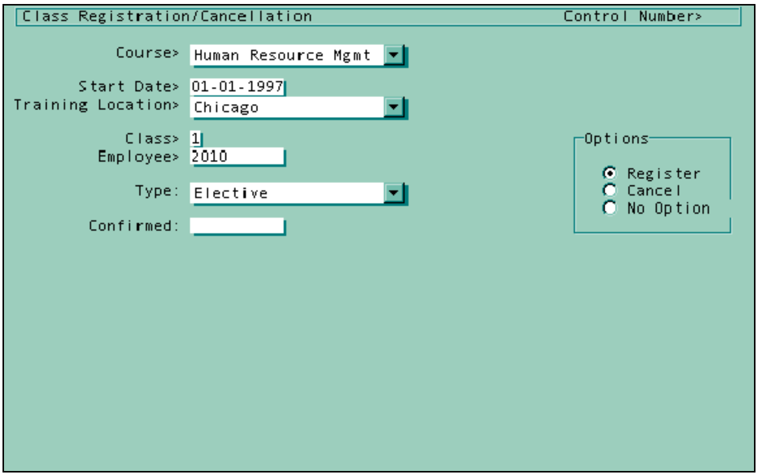
9. Select one of the Options

Select one of the option buttons to register or cancel the class for the employee. If you accidentally select either the Register or Cancel option button and only want to update the form data, select the No Option option button.

This text box can be left blank when inquiring about training requests received.

For practice, click the Register option button.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



10. Click Save or press Enter

The employee is registered for the class and the following message is displayed:

'*Note: Employee registered into class'

Whenever an employee is registered or canceled, employees who are wait-listed are displayed at the bottom of the form. If no employees are wait-listed, employees with training required are displayed.

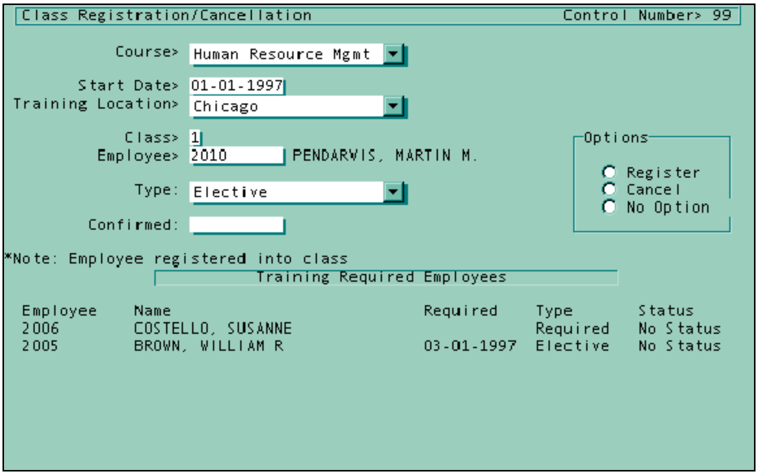
If the class is full and the employee can not be registered, three options are displayed along with a 'Class is full' message:

Option	Result
Wait List Employee	Adds employee to wait list.

Option	Result
Register in Another Class	Use the menu displayed to enroll employee in a different class.
Register Next Employee	Register or cancel a registration for another employee; Start Date, Training Location, and Class text boxes remain on the form.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- The waiting list process ***(on page 157)***

For an explanation the waiting list process.

Checking class registrations online

Use the Class Listing inquiry form (50RSCR) to display a listing of all employees registered or wait-listed for a training class.

1. Access the Class Listing form (50RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Register an Employee for Training
Task: Check Registration for a Class

For practice, access the Class Listing inquiry form (50RSCR).

2. Select the Course

Select the appropriate course.

As an alternative, select the List Course Options option in the Course option list and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

3. Type the Start Date

Type the start date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Type a question mark (?) in this text box to access the Course/Class selections. Select a course/class and then click Save or press Enter to return to the form. The Start Date, Training Location, and Class text boxes are automatically propagated on this form.

For practice, type '01-01-1997'.

4. Select the Training Location

Select the training location, for example, Sydney.

For practice, select 'Chicago'.

5. Select the Class

This will normally be '1' unless there are multiple occurrences of the same course on the same day.

For practice, select '1'.

6. Select one of the Options

Select the Registered option button to list registered employees.

Select the Wait Listed option button to list wait-listed employees.

Select the Both option button to list both registered and wait-listed employees.

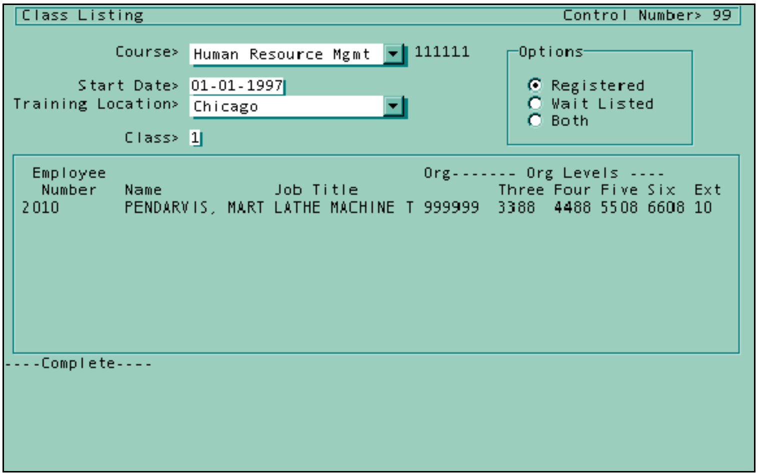
For practice, click the Registered option button.

7. Click Save or press Enter

The registered and/or wait-listed employees are displayed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Options for checking class registrations ***(see "Options for checking employee registrations" on page 158)***

For an explanation of the options for checking class registrations.

Checking class registrations on a report

To produce a listing of all employees registered for a training class using the Class Listing report (32RRPT) , complete the report schedule by entering the following report parameters:

Each class is reported separately. The total number of participants for each class is reported. Terminated employees and canceled classes are not reported.

Note: *Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.*

1. Enter the From (date) (optional)

Type the date the class starts in the From text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, the system date is used.*

For practice, type '01-01-1997'.

2. Enter the To (date) (optional)

Type the date the class stops in the To text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, all classes with dates equal to or later than the From date are reported.*

To report on classes from only one date, type the From date in both the From date and To date parameters.

For practice, leave this text box blank.

3. Select the Course (optional)

Select the title of the course

If this list box is left blank, all courses are reported.

For practice, leave this list box blank.

4. Select the Training Location (required)

Select the location of the course.

If this list box is left blank, all training locations are reported.

For practice, leave this list box blank.

5. Enter Class (optional)

Type the class sequence number in Class text box.

If this text box is left blank, all classes are reported.

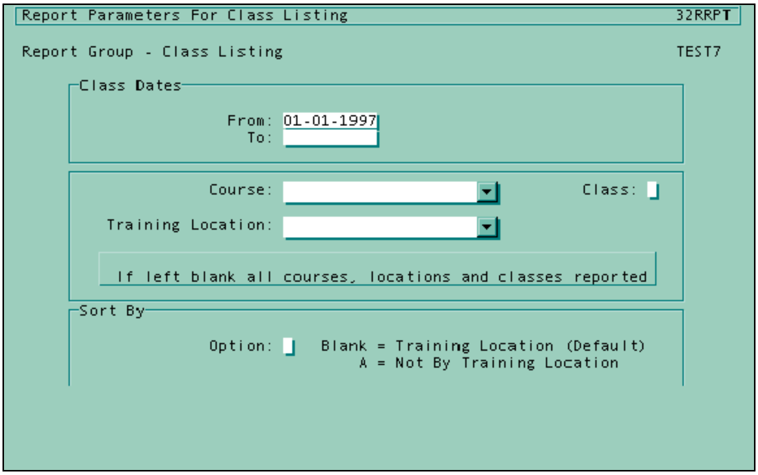
For practice, leave this text box blank.

6. Enter the Sort By Option (optional)

Leave the Option text box blank to accept the system default, which will sort by training location. If you want to show all employees regardless of training location, type 'A' in this text box.

For practice, leave this text box blank.

When completed, the report parameters may look similar to the example that follows:


Report Parameters For Class Listing 32RRPT

Report Group - Class Listing TEST7

Class Dates

From: 01-01-1997
To:

Course: Class:

Training Location:

If left blank all courses, locations and classes reported

Sort By

Option: Blank = Training Location (Default)
A = Not By Training Location

7. Click Save or press Enter

Once it has been processed, this report provides a listing of all employees registered for a class.

For practice, Click Save or press Enter.

See also:

- Options for checking class registrations ***(see "Options for checking employee registrations" on page 158)***

For an explanation of the options for checking class registrations.

- Class Listing report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Checking employee registrations online

Use the Employee Class Status inquiry form (57RSCR) to display a list of classes for which an employee is registered or wait-listed.

1. Access the Employee Class Status inquiry form (57RSCR)

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Register an Employee for Training
Task:	Check Employees Class Registration

For practice, access the Employee Class Status inquiry form (57RSCR).

2. Enter the Employee

Type the employee number of the employee for whom you want to display classes.

For practice, type '2010'.

3. Enter the Start (optional)

Type the start date for the classes in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

If this text box is left blank, the system date is used.

All classes with a Start Date equal to or later than this date will be selected.

For practice, type '01-01-1997'.

4. Enter the Stop (optional)

Type the stop date for the classes in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

If this text box is left blank, all future classes are displayed.

All classes with a Stop Date equal to or earlier than this date will be selected.

For practice, leave this text box blank.

5. Select one of the Options

Select the Registered option button to list classes for which the employee is registered.

Select the Wait Listed option button to list classes for which the employee is wait-listed.

Select the Both option button to list both registered and wait-listed classes.

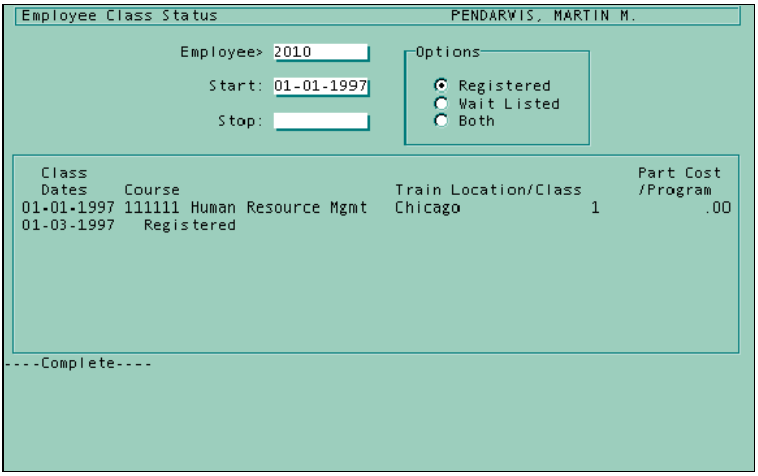
For practice, click the Registered option button.

6. Click Save or press Enter

The classes for which the employee is registered and/or wait-listed are displayed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Options for checking class availability ***(on page 154)***

For an explanation of the options for checking class availability.

Checking employee registrations on a report

To produce a list of all the classes for which an employee is scheduled using the Employee Training Schedule report (20RRPT) , complete the report schedule by entering the following report parameters:

Each employee's training schedule is printed on a different page. There are no totals for this report. Terminated employees are not included.

Note: *Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.*

1. Enter the From (date) (optional)

Type the date the class starts in the From text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, the system date is used.*

For practice, type '01-01-1997'.

2. Enter the To (date) (required)

Type the date the class stops in the To text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, all classes with dates equal to or later than the From date are reported.*

To report on classes from only one date, type the From date in both the From date and To date parameters.

For practice, leave this text box blank.

3. Select the Training Location (required)

Select the training location.

Note: *If this list box is left blank, all training locations are reported.*

For practice, leave this list box blank.

4. Enter an Employee Number (optional)

Type an employee number if a only a specific employee is to be included on the report.

Note: *If this text box is left blank, all employees are reported.*

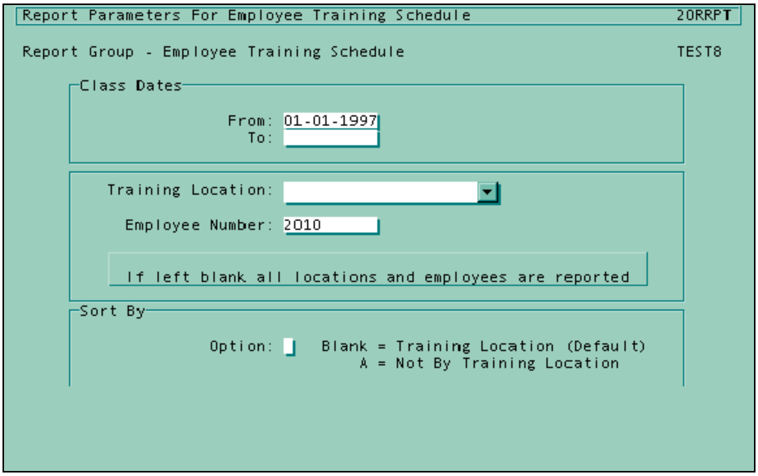
For practice, type '2010'.

5. Enter the Sort By Option

Leave the Option text box blank to accept the system default, which will sort by training location. If you want to show all employees regardless of training location, type 'A' in this text box.

For practice, leave this text box blank.

When completed, the report parameters may look similar to the example that follows:



6. Click Save or press Enter

Once it has been processed, this report provides a list of all the classes for which this employee is registered.

For practice, click Save or press Enter.

See also:

- Options for checking class registrations ***(see "Options for checking employee registrations" on page 158)***

For an explanation of options for checking class registrations.

- Employee Training Schedule report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Confirming class registrations - using confirmation letters

To produce a confirmation letter for each employee registered for the training class using the Class Confirmation report (23RRPT) , complete the report schedule by entering the following report parameters:

☞ *Each class is printed on a different page. There are no totals for this report. No reporting is done on canceled classes. Terminated employees are not reported.*

Note: Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.

1. Enter the From (date) (optional)

Type the date the class starts in the From text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, the system date is used.

For practice, type '01-01-1997'.

2. Enter the To (date) (required)

Type the date the class stops in the To text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, all classes with dates equal to or later than the From date are reported.

To report on classes from only one date, type the From date in both the From and To parameters.

For practice, leave this text box blank.

3. Select the Course (optional)

Select the course.

Note: *If this list box is left blank, all courses are reported.*

For practice, leave this list box blank.

4. Select the Training Location (required)

Select the training location.

Note: *If this list box is left blank, all training locations are reported.*

For practice, leave this list box blank.

5. Enter the Class (optional)

Type the class sequence number.

Note: *If this text box is left blank, all classes are reported.*

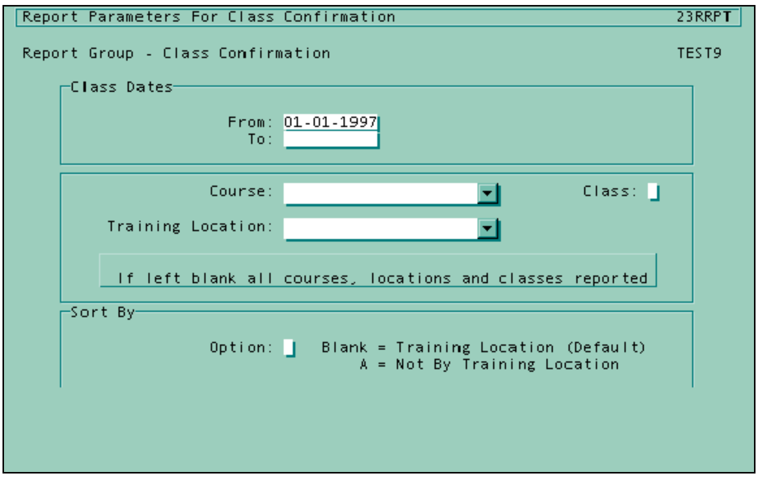
For practice, leave this text box blank.

6. Enter the Sort By Option (optional)

Leave the Option text box blank to accept the system default, which will sort by training location. If you want to show all employees regardless of training location, type 'A' in this text box.

For practice, leave this text box blank.

When completed, the report parameters may look similar to the example that follows:


Report Parameters For Class Confirmation 23RRPT

Report Group - Class Confirmation TEST9

Class Dates

From: 01-01-1997
To:

Course:
Class:
Training Location:

If left blank all courses, locations and classes reported

Sort By

Option: Blank = Training Location (Default)
A = Not By Training Location

7. Click Save or press Enter

Once it has been processed, this report provides a confirmation letter for each employee registered to attend the training class.

For practice, click Save or press Enter.

See also:

- Registration confirmation ***(on page 159)***
For an explanation of registration confirmation.
- Class Confirmation report ***(see "Report Quick Reference" on page 243)***
For a description of this report and its business uses.

Confirming class registrations - using a report reminder

To produce a letter to employees reminding them they are registered for a training class using the Class Reminder report (25RRPT), complete the report schedule by entering the following report parameters:

If an employee is registered for a class, a reminder is printed. Each employee reminder is printed on a separate page. No totals are printed on this report. Terminated employees and canceled classes are not included.

Note: Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.

1. Enter the From (date) (optional)

Type the date the class starts in the From text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, the system date is used.

For practice, type '01-01-1997'.

2. Enter the To (date) (required)

Type the date the class stops in the To text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, all classes with dates equal to or later than the From date are reported.

To report on classes from only one date, type the From date in both the From and To parameters.

For practice, leave this text box blank.

3. Select the Course (optional)

Select the course.

Note: If this list box is left blank, all courses are reported.

For practice, leave this text box blank.

4. Select the Training Location (optional)

Select the training location.

Note: *If this list box is left blank, all training locations are reported.*

For practice, leave this list box blank.

5. Enter the Class (optional)

Type the Class sequence number.

Note: *If this text box is left blank, all classes are reported.*

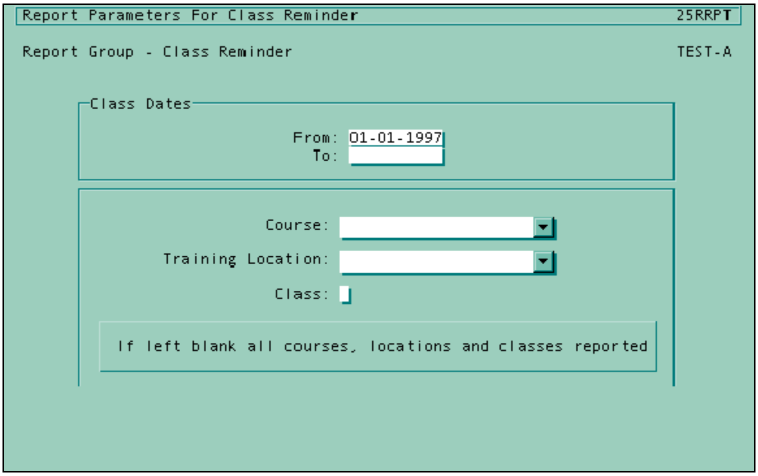
For practice, leave this text box blank.

6. Enter the Sort By Option

Leave the Option text box blank to accept the system default, which will sort by training location. If you want to show all employees regardless of training location, type 'A' in this text box.

For practice, leave this text box blank.

When completed, the report parameters may look similar to the example that follows:



7. Click Save or press Enter

Once it has been processed, this report provides a reminder letter to employees that they have been registered to attend a training class.

For practice, click Save or press Enter.

See also:

- Registration confirmation ***(on page 159)***
  For an explanation of registration confirmation.
- Class Reminder report ***(see "Report Quick Reference" on page 243)***
  For a description of this report and its business uses.

Registering employees for training programs

Use the Program Registration/Cancellation form (16RSCR) to register employees for training programs.

1. Access the Program/Registration Cancellation form (16RSCR)

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Register an Employee for Training
Task:	Register Employees for a Program

For practice, access the Program Registration/Cancellation form (16RSCR).

2. Select the Program

Select the Program title.

For practice, select 'HR Mgmt Program'.

3. Enter the Effective Date

Type the Effective Date of the program. This entry must match the date on the Program Schedule form (15RSCR).

For practice, type '01-01-1994'.

4. Enter the Employee Number

Type the employee number of the person to be registered in the training program.

For practice, type '1112'.

5. Select the Register option button

Select the Register option button to register the employee in the training program.

The description of the program and the name of the employee are displayed in Display mode after the above text boxes have been entered.

For practice, click 'Register'.

6. Click Save or press Enter

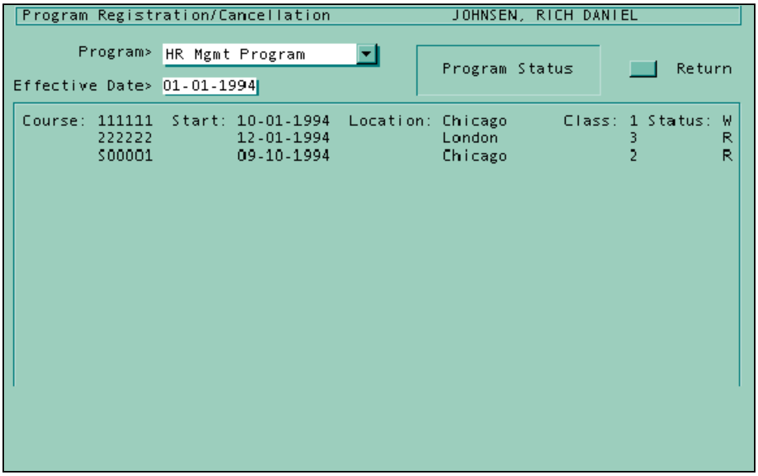
The employee is registered into, wait-listed for, or canceled from the program and from each of the training classes that make up the program.

In addition, a program status form panel is displayed that lists the classes for which the employee has been registered or wait-listed as a result of being registered for the training program.

Click the Return command button to return to the first form panel.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- The administration of training programs ***(on page 156)***

For an explanation of training program administration.

Checking program registrations online

Use the Program Inquiry form (52RSCR) to display a listing of employees registered or wait-listed for programs.

1. Access the Program Inquiry form (52RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Register an Employee for Training
Task: Check Registrations for a Program

For practice, access the Program Inquiry form (52RSCR).

2. Select the Program

Select the Program on which to report.

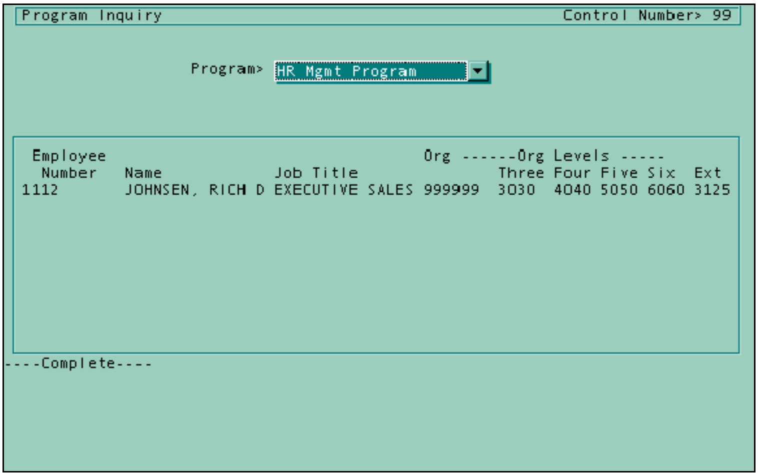
For practice, select the 'HR Mgmt Program'.

3. Click Save or press Enter

A list of registered or wait-listed employees is displayed. A '—Complete—' message is displayed when the whole program listing has been displayed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:


Program Inquiry Control Number> 99

Program> HR Mgmt Program

Employee Number	Name	Job Title	Org	Org Levels Three	Four	Five	Six	Ext
1112	JOHNSEN, RICH D	EXECUTIVE SALES	999999	3030	4040	5050	6060	3125

----Complete----

See also:

- The administration of training programs ***(on page 156)***

For an explanation of the administration of training programs.

Checking program registrations on a report

To produce a listing of all employees registered for each training program using the Student Program Status report (26RRPT) , complete the report schedule by entering the following report parameters:

Each program is reported separately. No totals are printed on this report. Terminated employees and canceled classes are not included.

Note: Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.

1. Select the Program (required)

Select the program.

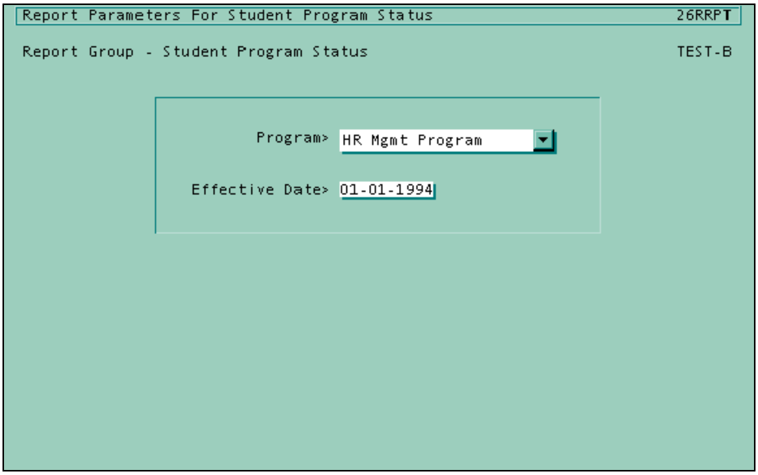
For practice, type 'Hr Mgmt Program'.

2. Enter the Effective Date (required)

Type the program effective date in MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM format (elsewhere).

For practice, type '01-01-1994'.

When completed, the report parameters may look similar to the example that follows:



3. Click Save or press Enter

Once it has been processed, this report lists, by program, all employees registered in the program and their class status.

For practice, click Save or press Enter.

See also:

- The administration of training programs ***(on page 156)***
For an explanation of the administration of training programs.

- Student Program Status report ***(see "Report Quick Reference" on page 243)***
For a description of this report and its business uses.

Extended Practice

1. Register these employees for the Flex Benefits class in Chicago on January 14, 1997:

   - 1114
   - 1234
   - 2012
   - 3011

2. Register these employees for the Basic Mgmt Program in Chicago that became effective September 1, 1994 (and which you established in the Extended Practice in Section 6):

   - 1113
   - 1115
   - 1116

3. Display a listing of all employees currently registered and/or wait-listed for the Flex Benefits class scheduled for January 14, 1997, in Chicago.

4. Display a listing of all employees currently registered for the Basic Mgmt Program described in question 2 above.

5. Use the Employee Class Status inquiry form (57RSCR) to display all classes for which Employees 1234 and 1113 are registered and/or wait-listed as of September 1, 1994. What happens if you leave the date text boxes blank?

6. Look at the Class Schedule form (13RSCR) for these classes and determine whether the class is full or if space is available and also note how many students are currently registered:

   - Class 111111 in Chicago on October 1, 1994
   - Class 222222 in London on December 1, 1994
   - Class FB001 in Chicago on January 14, 1997
   - Class FB001 in New Orleans on April 1, 1997

Review of Questions Answered

1. How are course availability and class availability checked?

2. How are training programs administered?

3. What is the waiting list process?

4. How are employee registrations confirmed?

CHAPTER 9

Canceling Registrations

In This Chapter

Introduction

Training Administration facilitates canceling class and program registrations after they have been established. This is an optional feature that must be done only when circumstances dictate that registration information be canceled.

☞ *If you do not need to cancel registration information, skip this Section and read* **Processing Training Results and Evaluations** *(on page 195)*.

Tasks

You can complete the following tasks to cancel registrations:

- Canceling a class registration
- Canceling a program registration

Prerequisites - Canceling Registrations

Before you can cancel registrations, all the following tasks must have been completed.

Organization details

Before any data can be entered, you must ensure that your organization details have been set up.

☞ *Refer to* **Implementing Training Administration** *(on page 23) for more information.*

Training courses

Before requesting training for an employee, it is important to enter all available training courses on the system and to set up the objectives, prerequisites, and costs for each course.

☞ *Refer to* **Setting Up and Maintaining Training Courses** *(on page 43),* **Setting Up and Maintaining Training Classes** *(on page 79), and* **Setting Up and Maintaining Training Programs** *(on page 113) for details on setting up and maintaining training courses, classes, and programs.*

Employee registrations

Before you can cancel registrations you must have already registered the employees for training classes or programs.

☞ *Refer to* **Registering an Employee for Training** *(on page 151) for details on registering employees for training classes and programs.*

Questions answered

The following questions are answered in this section:

1. How are employee class cancellations processed?
2. How are employee program cancellations processed?

Employee class cancellation processing

When an employee is canceled from attending a training class, the Number Registered and Status (if applicable) are updated accordingly on the Class Schedule form (13RSCR). A Training Required form (31RSCR) is also created for the canceled course with a Status value of Employee Canceled. If this form already exists for the employee for that course, the Status is updated in the same manner.

☞ *Refer to* **Setting Up and Maintaining Training Classes** *(on page 79) for more information on the Class Schedule form (13RSCR).*

☞ *Refer to* **Requesting Training for an Employee** *(on page 127) for more information on the Training Required form (31RSCR).*

See also:

- ***Canceling a class registration***

For detailed directions on canceling a class registration.

Apply the Concept
Canceling employee registrations is an optional system feature. Describe the advantages your organization would derive from using this functionality.

Employee program cancellation processing

When an employee is canceled from a training program, the employee is canceled from all classes in the training program. The Number Registered and Status (if applicable) are updated accordingly on the Class Schedule form (13RSCR) for each class.

☞ *Refer to* **Setting Up and Maintaining Training Classes** *(on page 79) for more information on the Class Schedule form (13RSCR).*

See also:

- ***Canceling a program registration***

For detailed directions on canceling a program registration.

Apply the Concept

Describe the primary difference between canceling an employee's registration from three separate classes that are not part of a program, and canceling an employee's registration in a program that is composed of the same three classes.

Detailed Directions

This section provides detailed instructions for the tasks discussed in this Section.

Tasks

Canceling a class registration

To cancel a class registration, follow these steps:

1. Access the Class Registration/Cancellation form (20RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Cancel Registrations
Task: Cancel a Class Registration

For practice, access the Class Registration/Cancellation form (20RSCR).

2. Click the Selections button

Access the selections list by clicking on the Selections button on the toolbar.

For practice, click the Selections button on the toolbar.

3. Select the class/employee you want to cancel

Double-click the class/employee you want to cancel.

The class information and employee number are returned to the form.

For practice, double-click the Human Resource Mgmt class dated '06-01-1998' (US and Canada) or '01-06-1998' (elsewhere).

4. Click the Cancel option button

Click the Cancel option button from the Options group box.

For practice, click the Cancel option button.

5. Click Save or press Enter

The employee is canceled from the training class and the following message is displayed:

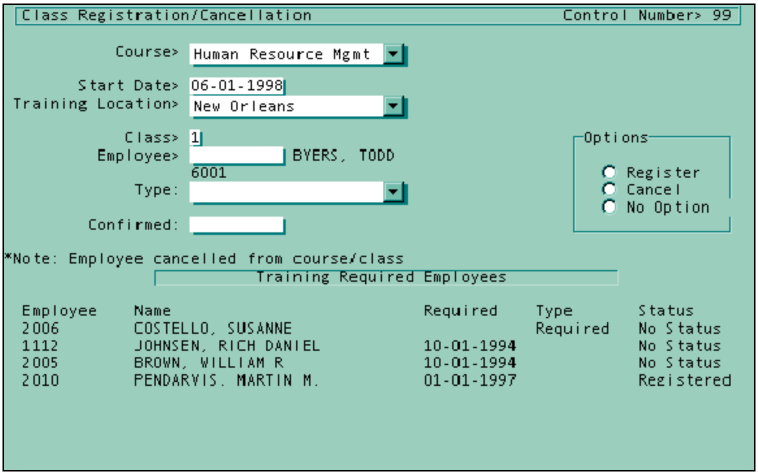
'*Note: Employee canceled from course/class'.

The names of employees who have training required or who are wait-listed are displayed at the bottom of the form.

Refer to **Registering an Employee for Training** *(on page 151) for more information on training required and the wait listing process.*

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:


Class Registration/Cancellation Control Number> 99

Course> Human Resource Mgmt

Start Date> 06-01-1998

Training Location> New Orleans

Class> 1

Employee> BYERS, TODD

6001

Type:

Confirmed:

Options

Register

Cancel

No Option

*Note: Employee cancelled from course/class

Training Required Employees

Employee	Name	Required	Type	Status
2006	COSTELLO, SUSANNE		Required	No Status
1112	JOHNSEN, RICH DANIEL	10-01-1994		No Status
2005	BROWN, WILLIAM R	10-01-1994		No Status
2010	PENDARVIS. MARTIN M.	01-01-1997		Registered

See also:

- Employee class cancellation processing ***(on page 185)***

For an explanation of employee class cancellation processing.

Canceling a program registration

To cancel a program registration, follow these steps:

1. Access the Program Registration/Cancellation form (16RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Cancel Registrations
Task: Cancel a Program Registration

For practice, access the Program Registration/Cancellation form (16RSCR).

2. Click the Selections button

Access the selections list by clicking on the Selections button on the toolbar.

For practice, click the Selections button on the toolbar.

3. Select the program from which you want to cancel the employee

Double-click the program from which you want to cancel the employee.

The program information is returned to the form.

For practice, double-click the 'HR Mgmt Program' effective '01-01-1994'.

4. Enter the Employee Number

Enter the employee number of the person you want to cancel from the program.

For practice, type '1112'.

5. Click the Cancel option button

Click the Cancel option button from the Options group box.

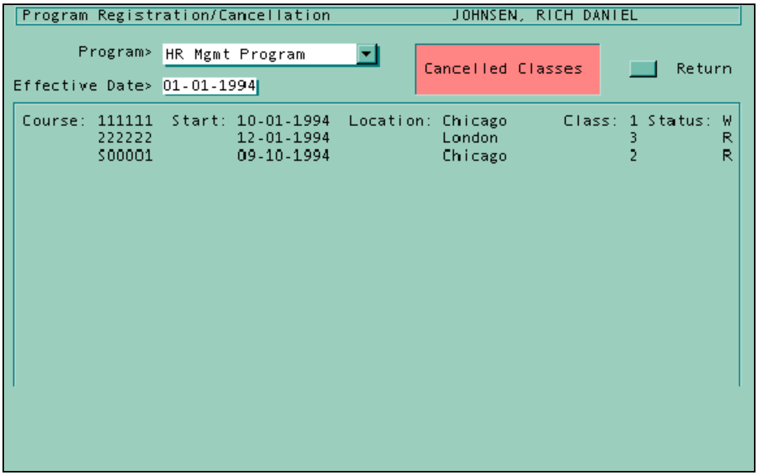
For practice, click the Cancel option button.

6. Click Save or press Enter

The employee is canceled from the training program and all classes in that program that the employee has not yet completed. A form is displayed listing the employee's canceled classes.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Employee program cancellation processing ***(on page 186)***

For an explanation of employee program cancellation processing.

Extended Practice

1. Access the Class Schedule form (13RSCR) and make note of the Status and Number Registered values for the HR Management class in Chicago on October 1, 1994.

2. Cancel employee 2004 from this HR Management class. What is the display at the bottom of the form (following the cancellation) telling you?

3. Return to the Class Schedule form (13RSCR) for this class and note how the Status and Number Registered values have changed.

4. Access the Training Required form (31RSCR) for employees 2004, and identify the processing that has occurred as a result of the cancellation.

5. Now that there is an opening in the class, register the first wait-listed employee: 1113.

6. Open the Class Registration/Cancellation form (20RSCR) and click the Selections button on the toolbar to list the classes that employee 1116 is registered for as a result of registering her in the Basic Mgmt Program in Chicago that became effective September 1, 1994. (She was registered in this program as part of the Extended Practice in Chapter 8.)

7. Cancel employee 1116 from the Basic Mgmt Program.

Review of Questions Answered

1. How are employee class cancellations processed?

2. How are employee program cancellations processed?

PART 4

Processing Training Results

In This Section

CHAPTER 10

Processing Training Results and Evaluations

In This Chapter

Introduction

Training Administration facilitates the entry of training results after a training class is completed, including employee class results and employee class evaluations. Entering training results accurately will allow you to view and analyze these results and improve your training programs and classes.

☞ *Skip this Section and read* **Completing and Analyzing Training Costs** *(on page 221) if your organization does not want to record training class results or evaluations.*

Tasks

You can complete the following tasks to enter training results and evaluations:

- Entering class results
- Viewing class results - online by class
- Viewing class results - on a report by class
- Viewing class results - online by employee
- Viewing class results - on a report by class
- Viewing class results - on a report by class results outstanding
- Collecting class evaluations
- Entering class evaluations

Prerequisites

Before you can enter training class results and evaluations, all the following tasks must have been completed.

Organization details

Before any data can be entered, you must ensure that your organization details have been set up.

☞ *Refer to* **Implementing Training Administration** *(on page 23)for more information.*

Training courses

Before entering training results, it is important to enter all available training courses on the system and to set up the objectives, prerequisites, and costs for each course.

☞ *Refer to* **Setting Up and Maintaining Training Courses** *(on page 43),* **Setting Up and Maintaining Training Classes** *(on page 79), and* **Setting Up and Maintaining Training Programs** *(on page 113) for details on setting up and maintaining training courses, classes, and programs.*

Employees registered

Before entering training results, it is important that all of the appropriate employees are registered into the training class(es) for which you want to enter results, and that the class has been held.

☞ *Refer to* **Registering an Employee for Training** *(on page 151) for details on registering employees for training classes and programs.*

Questions answered

The following questions are answered in this Section:

1. How are training class results processed?
2. What options are available when processing training class results?
3. What are the methods of viewing training class results?
4. How are training class evaluations processed?
5. What options are available when processing class evaluation results?

Class results processing

The following training class results processing occurs for each registered employee:

Class attended and passed

After an employee has attended a class and passed, and this is indicated on the Process Class Results form (22RSCR) for the employee, the following processing occurs:

- The employee's Training Required form (31RSCR) for the class is deleted.
- The employee's Training Results/History form (30RSCR) is updated with the results.
- The employee's Skills And Competencies form (33-SCR) is updated with the skills attained by taking the class.

Class attended and failed

After an employee has attended a class and failed, and this is indicated on the Process Class Results form (22RSCR) for the employee, the following processing occurs:

- The employee's Training Required form (31RSCR) for the class is marked with a failed indicator.
- The employee's Training Results/History form (30RSCR) is updated with the results.
- The employee's Skills And Competencies form (33-SCR) is not updated.

Class not attended or wait-listed employee did not get into class

A wait-listed employee who did not attend a class (because it was full, for example) would have a Training Results/History form (30RSCR) without the Class Attended box checked. So, if the class was not attended (by a registered or wait-listed employee) and the box is not checked, the following processing occurs:

- The Class Registration/Cancellation form (20RSCR) is deleted.
- A Training Required form (31RSCR) is created for the employee if the form does not exist.

It is possible that wait-listed employees might attend a class at the last minute because of a cancellation or extra spaces added to the class. Because of that possibility, the Process Class Results form (22RSCR) will process wait-listed employees as well, even though they were never officially registered. If the employee attends and passes the class, the following processing occurs:

- The employee's Training Required form (31RSCR) for the class is deleted.
- The employee's Training Results/History form (30RSCR) is updated with the results.
- The employee's Skills And Competencies form (33-SCR) is updated with the skills attained by taking the class.

See also:

- Entering class results ***(on page 203)***

For detailed directions on entering class results.

Class results options

There are two options available for recording class results. They are explained in the following sections.

Class results for selected registered employees

Training class results are entered on the Process Class Results form (22RSCR) for registered and wait-listed employees after a class has been held. Class results can be entered for individual employees by employee number.

Class results for all registered employees

Leave the employee number blank and click the Next command button on the Process Class Results form (22RSCR) to automatically scroll through and enter class results for all employees registered for a training class.

Class objectives

Class objectives are a very important component of entering class results. The objectives listed on the Process Class Results form (22RSCR) for a class are set up on the Course Directory form (10RSCR).

If an employee has taken and passed a class, you can check off the objectives that were met individually or select the All Objectives Met check box to select all objectives.

If an employee fails a class, you can not check any objectives (Reject).

See also:

- Entering class results ***(on page 203)***

For detailed directions on entering class results.

Apply the Concept
Define 'training class results' and identify the form used to record them.

Methods of viewing training class results

A number of facilities allow you to view training class results entered onto Training Administration. You must choose which method(s) is best for you. The options are as follows:

Selection option	Format	Form/Report
By class	Online	Class Results inquiry form (51RSCR)
By class	Hard copy	Class Results report (33RRPT)
By employee	Online	Training Results/History form (30RSCR)
By employee	Hard copy	Employee Training History report (21RRPT)
By training location	Hard copy	Class Results Outstanding report (45RRPT)

You have the option to record evaluation results without tying them to specific employees. You may also tie the results to the specific employee who did the rating.

See also:

- Viewing class results - online by class ***(on page 206)***
- Viewing class results - on a report by class ***(on page 208)***
- Viewing class results - online by employee ***(on page 210)***
- Viewing class results - on a report by employee ***(on page 211)***
- Viewing class results - on a report by class results outstanding ***(on page 213)***

For detailed directions on viewing class results.

- Class Results report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

- Employee Training History report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

- Class Results Outstanding report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Class evaluation results processing

The Process Class Evaluation Results form (23RSCR) is used to enter the results of evaluation forms filled out by class participants. These evaluation forms are printed by the Class Evaluation report (24RRPT). Up to 10 evaluation categories can have rating values recorded.

☞ *The Evaluation Required check boxes on the Class Schedule form (13RSCR) must be selected in order to produce the Class Evaluation report (24RRPT).*

See also:

- Collecting class evaluations ***(on page 215)***
For detailed directions on collecting class evaluation results.

- Entering class evaluations ***(on page 217)***
For detailed directions on entering class evaluation results.

- Class Evaluation report ***(see "Report Quick Reference" on page 243)***
For a description of this report and its business uses.

Apply the Concept
Define 'class evaluation results' and identify the form used to record them.

Class evaluation results options

Options for class evaluation results include up to 10 evaluation categories, explained in the following section.

Evaluation categories

Up to 10 evaluation categories can be set up in the Evaluation Category option list (TR39), numbered 01 through 10. These evaluation categories are the ones listed on the Process Class Evaluation Results form (23RSCR) and are unique to the Control Number or organization (not the class).

Note: *All organizations sharing the same Control Number for Training Administration tables share the same evaluation categories in option list TR39. Option lists TR17–TR26 are universal.*

Each evaluation category is tied to one of the rating value option lists (TR17–TR26). Each of the rating value options lists contain the values of Excellent, Very Good, Fair, and Poor. Example: the Evaluation Category option list value of Instructor is tied to the Evaluation 1 option list (TR17); the Evaluation Category option list value of Subject matter is tied to the Evaluation 2 option list (TR18), and so forth. Each of these option lists can also be set up to match the corresponding evaluation category.

Each of your Control Numbers can have its own evaluation category and rating value setup. Test Control Number 99 has been delivered with sample data for each of these option lists. Review these option lists and set up your own evaluation category and rating values for your Control Number(s).

See also:

- Entering class evaluations ***(on page 217)***

For detailed directions on entering class evaluation results.

Apply the Concept

Processing training results and evaluations is an optional feature of Training Administration. Consider how your organization currently records similar data (if at all), and describe how using this feature can improve training-related record keeping.

Detailed Directions

This section provides detailed instructions for the tasks discussed in this Section.

Note: *Results can be recorded only after a training class has been held.*

Tasks

Entering class results

To enter employee class results, follow these steps:

1. Access the Process Class Results form (22RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Process Results and Analyzing Costs
Task: Enter Class Results

For practice, access the Process Class Results form (22RSCR).

2. Select the Course

Select the appropriate course.

As an alternative, select the List Course Options option in the Course option list and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

3. Type the Start Date

The start date must be entered in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Alternatively, you can enter a question mark (?) in this text box and then press Enter to access the Course/Class selections. You can then select a course and return to this form. The Start Date, Training Location, and Class text boxes will be automatically filled in.

For practice, type '01-01-1997'.

4. Select the Training Location

Select the location, for example, Sydney.

For practice, select 'Chicago'.

5. Type the Class

This will normally be '1' unless there are multiple occurrences of the same course on the same day.

For practice, type '1'.

6. Type the Employee (optional)

Leave this text box blank to start the automatic process to enter class results for all employees registered for the class. Type an employee number to enter class results for an individual employee.

For practice, type '2010'.

7. Click Save or press Enter

A second form panel is displayed to enter class results for the employee. The class Start Date, Course, Location, and Class values are carried over from the first form panel. The Type and Train Units values are carried over from the Class Schedule form (13RSCR) if the information is available.

For practice, click Save or press Enter.

Note: *If you do not have all the results back for this employee and you wish to skip this form for now, click the Bypass command button to go to the next employee.*

8. Select a Type (optional)

If not carried over from the Class Schedule form (13RSCR), select a training type, for example, Elective.

For practice, select 'Elective' if this list box is not already filled.

9. Enter the Train Units (optional)

If not carried over from the Class Schedule form (13RSCR), type the number of training units.

For practice, this text box is already filled.

10. Select the School (optional)

Select the school if this class was taken externally.

For practice, leave this text box blank.

11. Enter the Major (optional)

Type the Major grade if appropriate.

For practice, type 'A'.

12. Select the Class Attended check box

Select the class attended check box after the employee has attended the training class.

For practice, select the Class Attended check box.

13. Enter the Minor (optional)

Type the minor grade if appropriate. You may use plus (+) and minus (-) signs in this text box.

For practice, type '+'.

14. Select the Result

Select the class result, for example, Passed or Failed.

For practice, select 'Passed'.

15. Enter the Absence Days (optional)

Type the number of days absent.

For practice, leave this text box blank.

16. Select the Absence Reason (optional)

Select the reason the employee was absent from class.

For practice, leave this text box blank.

17. Select the All Objectives Met check box(optional)

To indicate that all class objectives were met by the employee, select the All Objectives Met check box.

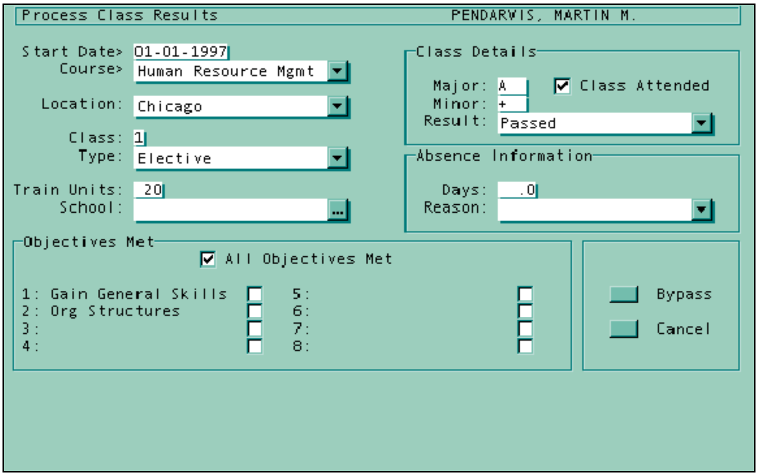
For practice, select the All Objectives Met check box.

18. Select the specific Objectives Met check boxes

If all objectives were not met, select only those check boxes for which the objectives were met.

For practice, leave the boxes blank.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



19. Click Save or press Enter

The next employee's record is displayed. Record the results and continue repeating this step until all results have been recorded.

You may also click the Bypass command button to skip an employee or click the Cancel command button to return to the first panel.

When all results have been recorded, the following message is displayed:

'*Note: The Session Result process is complete'.

For practice, click Save or press Enter.

See also:

- Class evaluation results processing ***(on page 201)***
For an explanation of class results processing.

- Class evaluation results options ***(on page 202)***
For an explanation of class results options.

Viewing class results - online by class

To view training results online by class, use the Class Results inquiry form (51RSCR).

1. Access the Class Results inquiry form (51RSCR)

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Process Results and Analyzing Costs
Task:	View Class Results

For practice, access the Class Results inquiry form (51RSCR).

2. Select the Course

Select the appropriate course.

As an alternative, select the List Course Options option in the Course option list (TR33) and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

3. Type the Start Date

The start date must be entered in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Alternatively, you can enter a question mark (?) in this text box and then press Enter to access the Course/Class selections. You can then select a course and return to this form. The Start Date, Training Location, and Class text boxes will be automatically filled in.

For practice, type '10-01-1994' (US and Canada) or '01-10-1994' (elsewhere).

4. Select the Training Location

Select the training location, for example, Sydney.

For practice, select 'Chicago'.

5. Type the Class

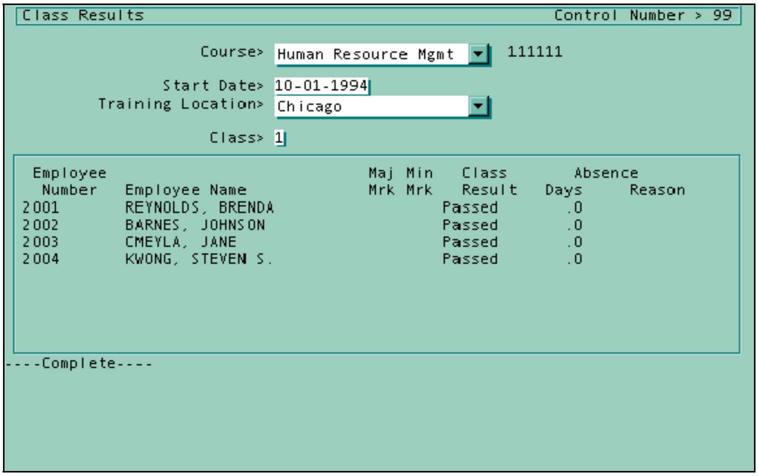
This will normally be '1' unless there are multiple occurrences of the same course on the same day.

For practice, type '1'.

6. Click Save or press Enter

The training results on file for the class are displayed on the form.

For practice, click Save or press Enter.



See also:

- Methods of viewing training class results ***(on page 200)***

For an explanation of the methods of viewing training class results.

Viewing class results - on a report by class

To view training results by class on a hard-copy report using the Class Results report (33RRPT) , complete the report schedule by entering the following report parameters:

Each Class is reported separately. The total number of employees for each class is reported. Terminated employees and canceled classes are not reported.

Note: *Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.*

1. Enter the From (date) (optional)

Type the date the class starts in the From text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, the system date is used.*

For practice, type '10-01-1994' (US and Canada) or '01-10-1994' (elsewhere).

2. Enter the To (date) (optional)

Type the date the class stops in the To text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, training results on dates equal to or later than the From date are reported.*

To report on training results for a specific date, type the From date in both the From and To parameters.

For practice, leave this text box blank.

3. **Select the Training Location (optional)**

To report on a specific training location, select the location.

Note: *If this list box is left blank, all training locations are reported.*

For practice, leave this list box blank.

4. **Select the Course (optional)**

To report on a specific training course, select the course here.

Note: *If this list box is left blank, all training courses are reported.*

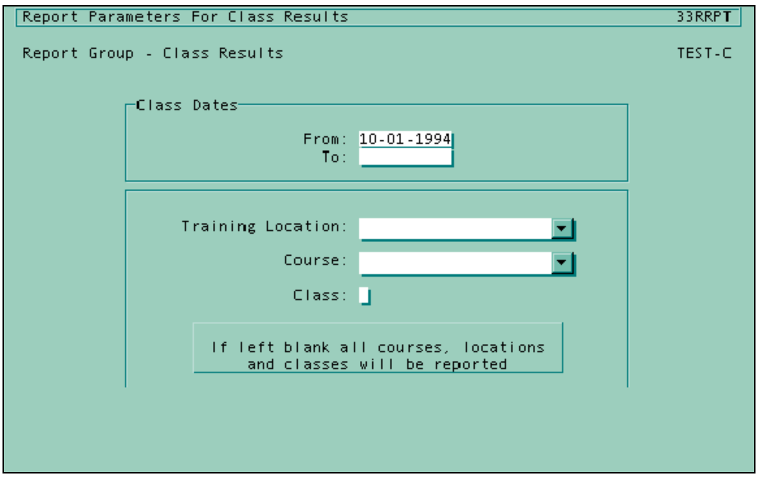
For practice, leave this list box blank.

5. **Enter the Class (optional)**

To report on a specific class, type the class sequence here. If this text box is left blank, all training classes are reported.

For practice, leave this text box blank.

When completed, the report parameters may look similar to the example that follows:



6. **Click Save or press Enter**

Once it has been processed, this report produces a list of employee class performances.

For practice, click Save or press Enter.

See also:

- Methods of viewing training class results ***(on page 200)***

For an explanation of the methods of viewing training class results.

- Class Results report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Viewing class results - online by employee

To view training results online by employee, use the Training Results/History form (30RSCR).

If class results are processed by the Process Class Results form (22RSCR), this form is automatically updated with the information.

1. Access the Training Results/History form (30RSCR)

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Process Results and Analyzing Costs
Task:	View Training Results/History

For practice, access the Training Results/History form (30RSCR) for employee 2001.

2. Click the Selections button

Click the Selections button on the toolbar to display of list of classes for this employee.

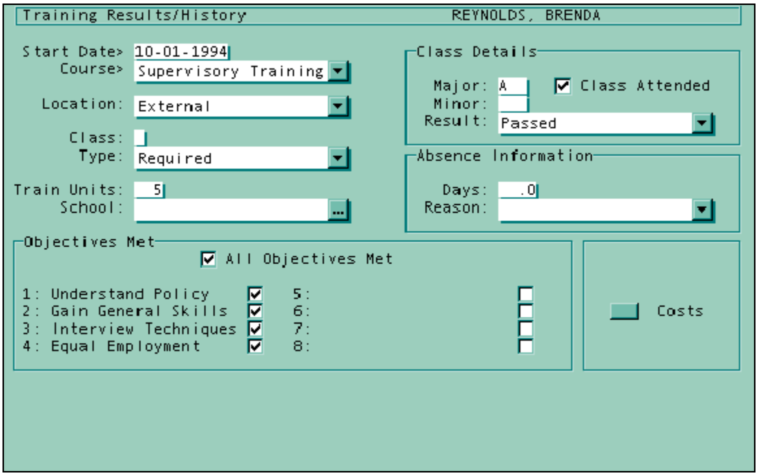
For practice, click the Selections button on the toolbar.

3. Select the class for which you want results

Double-click the class for which you want results. The selected class results are displayed. Selecting the Costs button brings up the Employee Training Class Costs form (34RSCR).

For practice, select the 'Supervisory Training' class.

If you completed the Guided Practice, the resulting screen should look similar to the example that follows:



See also:

- Methods of viewing training class results ***(on page 200)***

For an explanation of the methods of viewing training class results.

Viewing class results - on a report by employee

To view training results by employee on a hard-copy report using the Employee Training History report (21RRPT) , complete the report schedule by entering the following report parameters:

Each employee's training history is printed on a different page. There are no totals for this report. Terminated employees are not included.

Note: *Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.*

1. Enter the From (date) (optional)

Type the date the class starts in the From text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, the system date is used.*

For practice, select '10-01-1994' (US and Canada) or '01-10-1994' (elsewhere).

2. Enter the To (date) (optional)

Type the date the class stops in the To text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, training results on dates equal to or later than the From date are reported.*

To report on training results for a specific date, type the From date in both the From and To parameters.

For practice, leave this text box blank.

3. Select the Training Location (optional)

Select the location of the training.

Note: *If this list box is left blank, all training locations are reported.*

For practice, leave this list box blank.

4. Enter the Employee Number (optional)

To report on a specific employee, enter the Employee Number.

Note: *If this text box is left blank, all employees are reported.*

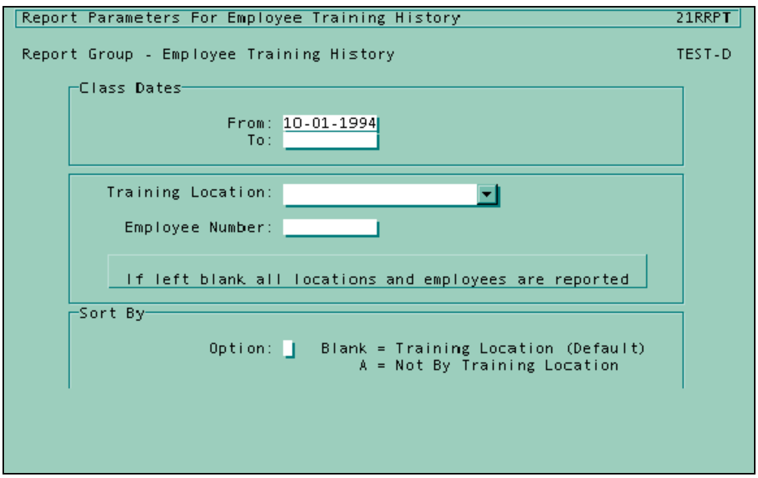
For practice, leave this text box blank.

5. Enter the Sort By Option

Leave the option text box blank to accept the system default, which will sort by training location. If you want to show all employees regardless of training location, type 'A' in this text box.

For practice, leave this text box blank.

When completed, the report parameters may look similar to the example that follows:



6. Click Save or press Enter

Once it has been processed, this report lists employee training history and the results of each training class.

For practice, click Save or press Enter.

See also:

- Methods of viewing training class results ***(on page 200)***
For an explanation of the methods of viewing training class results.

- Employee Training History report ***(see "Report Quick Reference" on page 243)***
For a description of this report and its business uses.

Viewing class results - on a report by class results outstanding

To view training results outstanding on a hard-copy report using the Class Results Outstanding report (45RRPT) , complete the report schedule by entering the following report parameters:

☞ *Each Training Location is reported separately. No totals are reported. Terminated employees and canceled classes are not reported.*

Note: Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.

1. Enter the From (date) (optional)

Type the date the class starts in the From text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, the system date is used.

For practice, type '10-01-1994' (US and Canada) or '01-10-1994' (elsewhere).

2. Enter the To (date) (optional)

Type the date the class stops in the To text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, training results on dates equal to or later than the From date are reported.

To report on training results for a specific date, type the From date in both the From and To parameters.

For practice, leave this text box blank.

3. Select the Course (optional)

To report on a specific training course, select the course.

Note: If this list box is left blank, all training courses are reported.

For practice, leave this list box blank.

4. Enter the Class (optional)

To report on a specific class, type the class sequence number.

Note: *If this text box is left blank, all training classes are reported.*

For practice, leave this text box blank.

5. Select the Training Location (optional)

To report on a specific training location, select the location.

Note: *If this list box is left blank, all training locations are reported.*

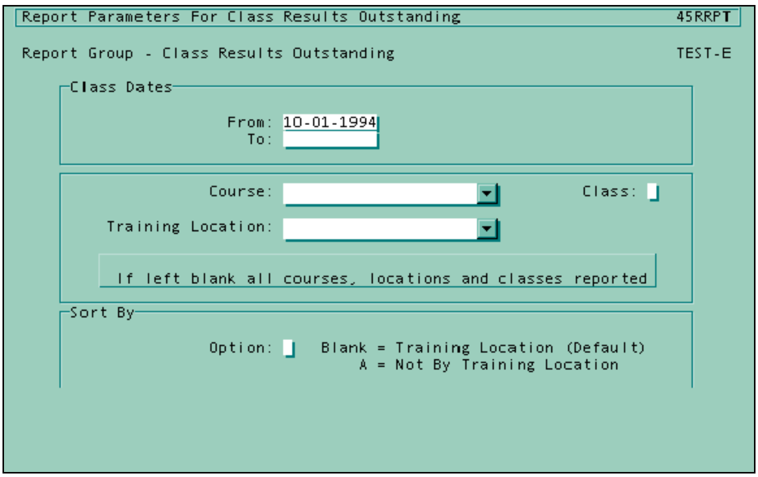
For practice, leave this list box blank.

6. Enter the Sort By Option (optional)

Note: *Leave the Option text box blank to accept the default sort, which is by training location. If you want to show all employees regardless of training location, type 'A' in the Option text box.*

For practice, leave this text box blank.

When completed, the report parameters may look similar to the example that follows:



7. Click Save or press Enter

Once it has been processed, this report provides a listing of class participants who have no outcome recorded.

For practice, click Save or press Enter.

See also:

- Methods of viewing training class results ***(on page 200)***
For an explanation of this identifier.

- Class Results Outstanding report ***(see "Report Quick Reference" on page 243)***
For a description of this report and its business uses.

Collecting class evaluations

To generate evaluation forms using the Class Evaluation report (24RRPT), complete the report schedule by entering the following report parameters:

Each evaluation form is printed on a separate page. No totals are printed on this report. Terminated employees and canceled classes are not included.

The Evaluation Required text box on the Class Schedule form (13RSCR) must be checked for this report to generate evaluation forms.

Note: Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.

1. Enter the From (date) (optional)

Type the date the class starts in the From text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, the system date is used.

For practice, type '10-01-1994' (US and Canada) or '01-10-1994' (elsewhere).

2. Enter the To (date) (optional)

Type the date the class stops in the To text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: If this text box is left blank, training results on dates equal to or later than the From date are reported.

To report on training results for a specific date, type the From date in both the From and To parameters.

For practice, leave this text box blank.

3. Select the Course (optional)

To report on a specific training course, select the course.

Note: If this list box is left blank, all training courses are reported.

For practice, leave this list box blank.

4. Select the Training Location (optional)

To report on a specific training location, select the location.

Note: If this list box is left blank, all training locations are reported.

For practice, leave this list box blank.

5. Enter the Class (optional)

To report on a specific class, type the class sequence number.

Note: If this text box is left blank, all training classes are reported.

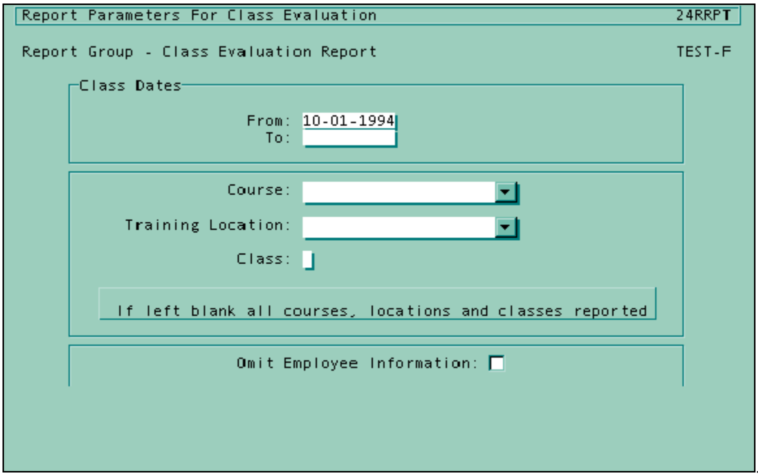
For practice, leave this text box blank.

6. Select the Omit Employee Information check box (optional)

In its delivered format, the system includes employee information on the evaluation forms. Select the Omit Employee Information check box to omit the employee information.

For practice, do not select this check box.

When completed, the report parameters may look similar to the example that follows:



7. Click Save or press Enter

Once it has been processed, this report provides an evaluation form for class participants to fill out upon completion of the training class. This form can be used as a source document when completing the Process Class Evaluation Results form (23RSCR).

For practice, click Save or press Enter.

See also:

- Class evaluation results processing ***(on page 201)***
For an explanation of Class evaluation results processing.
- Class Evaluation report ***(see "Report Quick Reference" on page 243)***
For a description of this report and its business uses.

Entering class evaluations

Use the Process Class Evaluation Results form (23RSCR) to record the results of evaluation forms filled out by class participants.

Note: *You may need to add your own evaluation categories to the Evaluation Category option list (TR39) prior to following these steps.*

1. Access the Process Class Evaluation Results form (23RSCR)

Access this form by making the following selection from the Navigator.

Component:	Training Administration
Process:	Process Results and Analyzing Costs
Task:	Enter Class Evaluations

For practice, access the Process Class Evaluation Results form (23RSCR).

2. Select the Course

Select the appropriate course.

As an alternative, select the List Course options option in the Course option list (TR33) and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

3. Type the Start Date

The start date must be entered in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Alternatively, you can enter a question mark (?) in this text box and then press Enter to access the Course/Class selections. You can then select a course and return to this form. The Start Date, Training Location, and Class text box will be automatically filled in.

For practice, type '10-01-1994' (US and Canada) or '01-10-1994' (elsewhere).

4. Select the Training Location

Select the location, for example, Sydney.

For practice, select 'Chicago'.

5. Type the Class

This will normally be '1' unless there are multiple occurrences of the same course on the same day.

For practice, type '1'.

6. Type the Employee (optional)

Leave this text box blank to record class evaluations without tying them to a specific employee. Enter an employee number to tie the evaluation to a specific employee.

For practice, type '2001'.

7. Select Evaluations

Select the appropriate evaluation results in up to 10 evaluation categories. Five evaluation categories are on the first form panel and five are on the second form panel.

Click the More Categories command button to reach the second form panel. The Original Entry command button returns you to the first form panel and the New Entry command button starts the process over.

For practice, select some evaluation results.

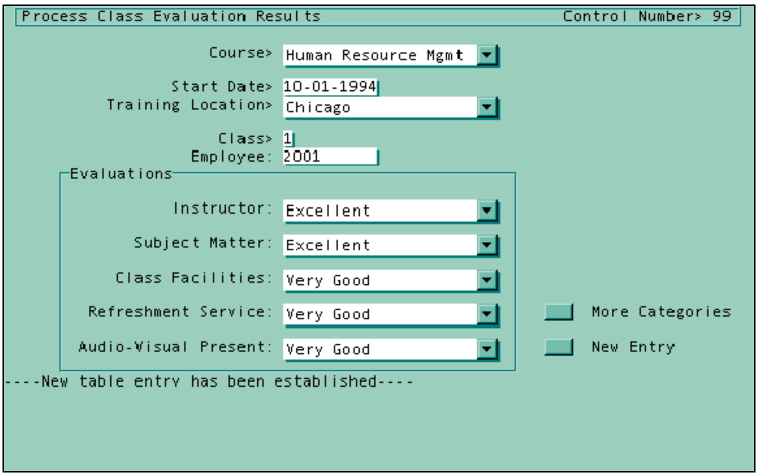
8. Click Save or press Enter

The employee class evaluation results are recorded and the following message is displayed:

'—New table entry has been established—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Class evaluation results processing ***(on page 201)***
For an explanation of class evaluation results processing.

- Class evaluation results options ***(on page 202)***
For an explanation of class evaluation results options.

Extended Practice

1. Access the Process Class Results form (22RSCR) for the Flex Benefits class in Chicago on January 14, 1997. Record results for all employees who attended the class:

Employee number	Training class results
1114	Employee passed the class, missed no days, and met all objectives.
1234	Employee passed this elective class but missed a half day because of a work conflict. All objectives were met.
2012	Missed one and a half days of class because of a death in family. This class should be recorded as Incomplete.
3011	Employee failed the class even though no class time was missed.

2. View the training results just recorded online by class by accessing the appropriate form.

3. View the Training Required inquiry form (33RSCR) for employee 3011. Explain the processing that has occurred.

4. Process the class evaluation results by employee for the two employees who successfully completed the class and met all objectives: 1114 and 1234. Both employees gave Excellent ratings to most categories, but Employee 1114 rated the Refreshment Service as Fair and Employee 1234 rated the Class Facilities as Very Good. Both felt all objectives had been met.

Review of Questions Answered

1. How are training class results processed?

2. What options are available when processing training class results?

3. What are the methods of viewing training class results?

4. How are training class evaluations processed?

5. What options are available when processing class evaluation results?

CHAPTER 11

Completing and Analyzing Training Costs

In This Chapter

Introduction

Training Administration facilitates viewing and analyzing the costs incurred developing and providing training classes. As described earlier, costs can be recorded at the course, class, and employee levels. This is an optional feature designed for organizations that want to track these costs and make decisions based on how much is being spent to develop and conduct training classes.

Tasks

The following tasks are associated with analyzing training class costs:

- Entering employee training class costs
- Viewing costs using the Employee Training Class Costs form
- Viewing costs using the Training Class Costs Summary form
- Viewing class costs by provider
- Viewing training costs to charge back to employees

Prerequisites

Before you can begin to analyze costs, the following tasks must have been completed.

Training Courses and classes

Before analyzing training costs, it is important to enter all available training courses and classes on the system and to set up the costs for each one.

☞ *Refer to* **Setting Up and Maintaining Training Courses** *(on page 43),* **Setting Up and Maintaining Training Classes** *(on page 79), and* **Setting Up and Maintaining Training Programs** *(on page 113) for details on setting up and maintaining training courses, classes, and programs.*

Questions answered

The following questions are answered in this chapter:

1. What are the cost categories?
2. What are the different types of costs?
3. What are the options when recording costs?

Cost Categories

There are various categories for costs. These are defined in option list TR14 on the Course Directory–Costs form (10RSCR).

As seen earlier, certain costs associated with the course level are set up on the Course Directory form (10RSCR), and certain costs associated with the class level are set up on the Class Schedule form (13RSCR). These include cost categories of Equipment, Operating, Participant, Per Head, and Miscellaneous. Costs established at the course level are carried through to the class level. In addition, training costs pertaining to a *specific employee* can be established on the Employee Training Class Costs form (34RSCR) and include costs for an employee to attend training like individual airfare and lodging, as well as prorated salary expense.

In all, three different employee-level cost categories are available: Participant, Per Head, and Individual. Employee-level costs that are the same for all class participants can be recorded at the course or class level as Participant or Per Head costs. Examples: Course fees of a certain dollar amount that apply to every Participant are typically recorded at the course level. A Per Head charge for lunch or breaks and refreshments for each person attending a particular training class gets recorded at the class level. If, however, you need to record additional costs associated with a specific employee, these are considered Individual costs and are recorded on the Employee Training Class Costs form (34RSCR).

All employee-level costs categorized as Participant, Per Head, and Individual display on the Total Costs panel of the Employee Training Class Costs form (34RSCR) as viewed for a specific employee. The total of all cost categories can be viewed on the Training Class Costs Summary form (35RSCR).

Apply the Concept
How would using the optional Analyzing Training Costs feature be helpful to your organization?

Types of costs

For each cost category, a cost type must be entered. Examples of cost types include Airfare and Room Rental.

Costing options

Class costs can be set up on the Class Costs panel of the Class Schedule form (13RSCR). This is an optional panel. Costs specified on this panel are different from those specified at the course level on the Course Directory form (10RSCR). For example, the cost of books might be standard for all classes within a course and therefore would need to be recorded at course level.

Alternatively, the cost for a course instructor fee might vary at the class level, since different instructors might charge different amounts. These costs could be recorded at the class level.

Costs can also be set up and viewed at the employee level using the Employee Training Class Costs Form (34RSCR). For example, the cost for supplying an alternative vegetarian meal for an employee might be associated with an individual employee cost. Other examples of individual employee costs are air fare, lodging, and prorated salary expense.

The salary expense amount can be included in the total employee costs for the training class. Three methods are available for calculating the salary expense amount:

- Entered Salary—Salary expense amount is entered manually in the Salary text box.
- Use HED 001—Salary amount is calculated using HED 001 (Regular Pay); the employee's hourly rate is multiplied by the number of class hours and is displayed in the Salary text box in Display mode.
- Use Salary Segment—Salary amount is calculated using the Salary Assignment/Changes form (40-SCR); the employee's hourly rate is multiplied by the number of class hours and is displayed in the Salary text box in Display mode.

The salary expense is then included in the total value for all class costs.

Other methods of viewing class costs include:

- Training Expenditure Charge-Back report (27RRPT)
- Training Expenditure Disbursement report (28RRPT)
- Training Class Costs Summary form (35RSCR)

See also:

- Entering employee training class costs ***(on page 227)***

For detailed directions on entering class costs.

- Viewing costs using the Employee Training Class Costs form ***(on page 230)***
- Viewing costs using the Training Class Costs Summary form ***(on page 232)***

For detailed directions on viewing costs.

- Viewing class costs by provider ***(on page 234)***

For detailed directions on viewing costs by provider.

- Viewing training class costs to charge back to employees ***(on page 235)***

For detailed directions on viewing charge-back costs.

Apply the Concept
Describe the tools available in Training Administration to help organizations view and analyze costs.

Detailed Directions

This section provides detailed instructions for the tasks discussed in this chapter.

Tasks

Entering employee training class costs

To enter training class costs associated with an individual employee, use the Employee Training Class Costs form. (34RSCR)

1. **Access the Employee Training Class Costs form (34RSCR)**

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Process Results and Analyzing Costs
Task: Enter Employee Class Costs

For practice, access the Employee Training Class Costs form (34RSCR) for employee 2010.

2. **Click the Clear button**

To avoid copying pre-existing information, click the Clear button on the toolbar to clear the text boxes on the form.

For practice, click the Clear button on the toolbar.

3. **Type the Start Date**

The start date must be entered in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

For practice, type '01-01-1997'.

4. **Select the Course**

Select the appropriate course.

As an alternative, select the List Course Options option in the Course option list (TR33) and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

5. Select the Location

Select the location, for example, Sydney.

For practice, select 'Chicago'.

6. Type the Class

This will normally be '1' unless there are multiple occurrences of the same course on the same day.

For practice, type '1'.

7. Select up to five Categories

Select the cost categories. Categories of Individual, Per Head, and Participant indicate employee-level costs. A Category value must be entered if a Type or Cost Amount will be entered.

For practice, select 'Individual' in categories 1 and 2.

8. Select up to five associated Types

Examples of cost types are Overhead Projector and Large Monitor rental.

For practice, select 'Lodging' in type 1 and 'Airfare' in type 2.

9. Enter up to five associated Amounts

Enter the associated cost using two decimal places. The Category, Type, and Cost Amount on each line are tied together and define a cost description and amount.

For practice, type '150.00' in cost 1 and '185.00' in cost 2.

10. Select a Method (optional)

Select the method used to determine the salary expense. This salary expense amount can be included in the total employee costs for the training class.

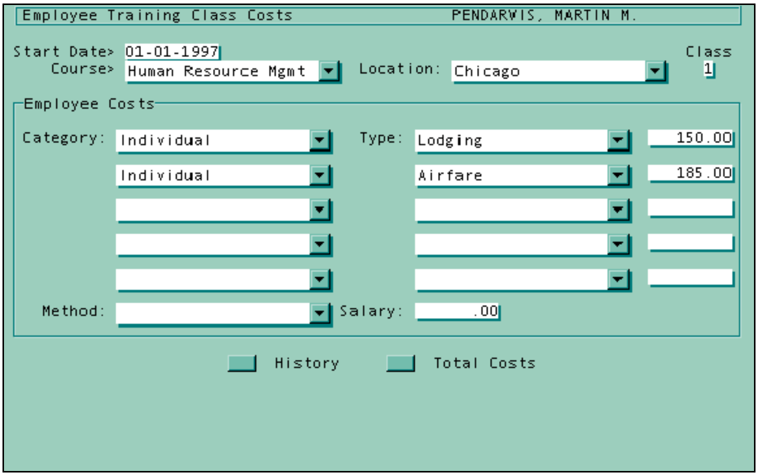
For practice, select 'Use HED 001'.

11. Enter the Salary (optional)

If the method code above is set to 'Entered Salary', enter the salary amount here. Otherwise, leave this text box blank.

For practice, leave this text box blank.

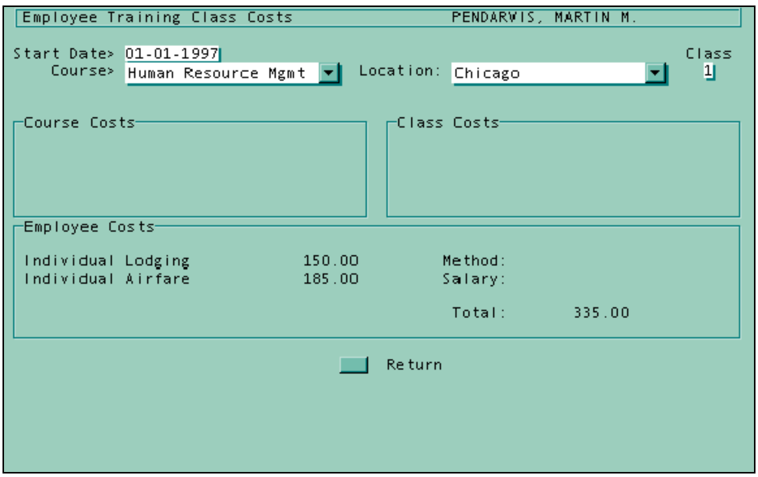
If you completed the Guided Practice, the resulting form should look similar to the example that follows:



12. Click the Total Costs command button

Employee-level costs can be viewed by selecting the Total Costs command button at the bottom of the form. The total value for all costs (including salary expense) is displayed in the bottom right corner of the Total Costs panel of this form. Any course or class costs associated with the employee will be displayed.

For practice, click the Total Costs command button.



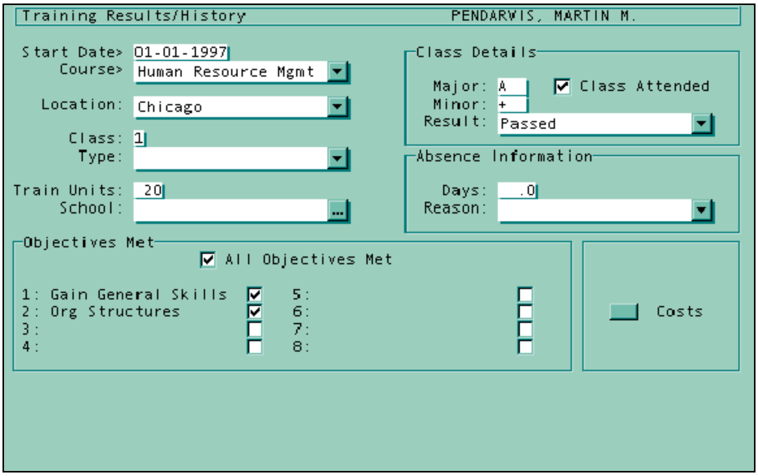
Select the Return command button to return to the entry form panel.

13. Click the History command button

You may click the History button at the bottom of the form to see the Training Results/History form (30RSCR) for this employee.

For practice, click the History command button.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



14. Click Save or press Enter

Employee training costs are set up.

For practice, click Save or press Enter.

See also:

- Costing options ***(on page 225)***

For an explanation of costing options.

Viewing costs using the Employee Training Class Costs form

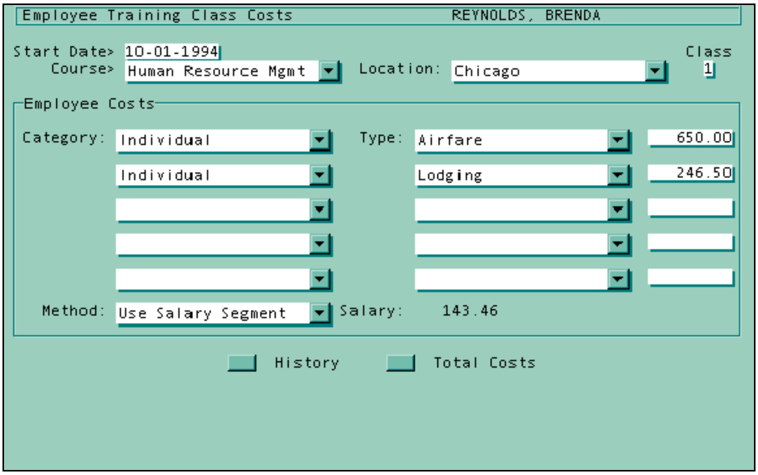
To display costs associated with a specific employee taking an internal or external training class, use the Employee Training Class Costs form (34RSCR).

1. Access the Employee Training Class Costs form

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Process Results and Analyzing Costs
Task: Enter Employee Class Costs

For practice, access the Employee Training Class Costs form (34RSCR) for employee 2001.



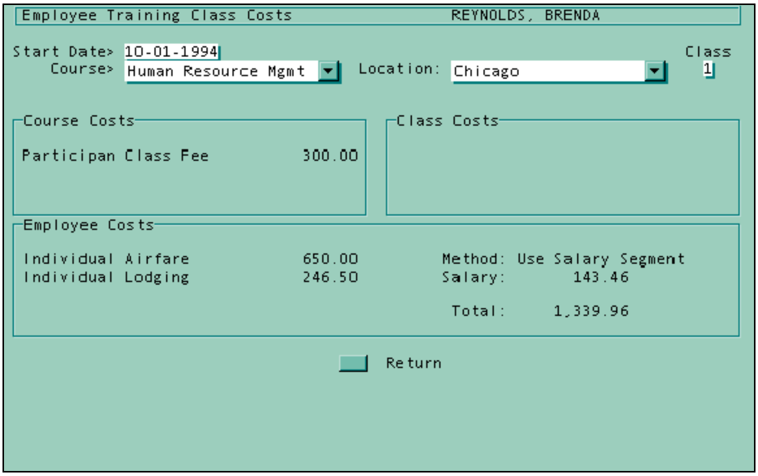
2. Click the Total Costs command button

Click the Total Costs command button to access the Total Costs form panel.

The total value for all course-, class-, and employee-level costs (including salary expense) is displayed in the bottom right corner of the form. Select the Return command button to return to the entry form panel.

For practice, click the Total Costs command button.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:


Employee Training Class Costs REYNOLDS, BRENDA

Start Date> 10-01-1994
Course> Human Resource Mgmt Location: Chicago Class 1

Course Costs

Participan Class Fee 300.00

Class Costs

Employee Costs

Individual Airfare 650.00 Method: Use Salary Segment
Individual Lodging 246.50 Salary: 143.46

Total: 1,339.96

Return

See also:

- Costing options ***(on page 225)***

For an explanation of costing options.

Viewing costs using the Training Class Costs Summary form

To view training costs, use the Training Class Costs Summary form (35RSCR).

1. Access the Training Class Costs Summary form (35RSCR)

Access this form by making the following selection from the Navigator.

Component: Training Administration
Process: Process Results and Analyzing Costs
Task: View Class Costs Summary

For practice, access the Training Class Cost Summary form (35RSCR).

2. Select the Course

Select the appropriate training course.

As an alternative, select the List Course Options option in the Course option list (TR33) and then click Save or press Enter to display a list of course options and their descriptions. Select a course from the list, then click Save or press Enter.

For practice, select 'Human Resource Mgmt'.

3. Type the Start Date

The Start Date must be entered in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

After selecting a Course, you can enter a question mark (?) in the Start Date text box and then press Enter to access the Course/Class selections. You can then select a course/class and return to this form. The Start Date and Training Location text boxes will be filled in automatically.

For practice, type '10-01-1994'(US and Canada) or '01-10-1994'(elsewhere).

4. Select the Training Location

Select a specific training location.

For practice, select 'Chicago'.

5. Type the Class

Type the Class sequence number associated with the training class.

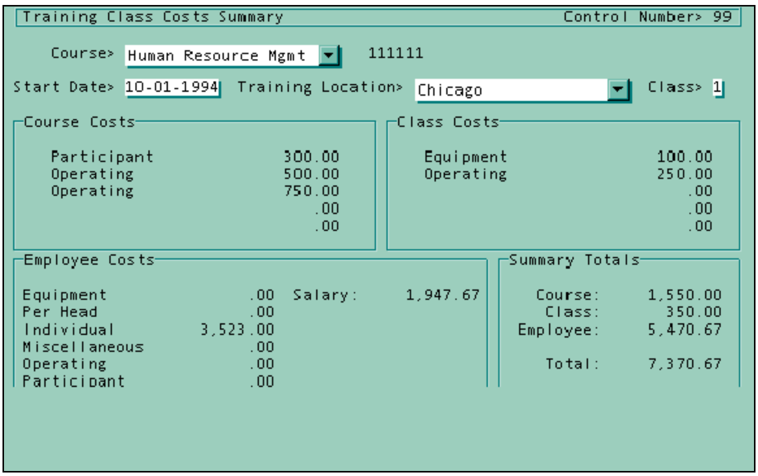
For practice, type '1'.

6. Click Save or press Enter

Course-, class-, and employee-level costs are displayed with a summary also included.

For practice, click Save or press Enter.

If you completed the Guided Practice, the resulting form should look similar to the example that follows:



See also:

- Costing options ***(on page 225)***

For an explanation of this identifier.

Viewing class costs by provider

To view training costs by provider using the Training Expenditure Disbursement report (28RRPT), complete the report schedule by entering the following report parameters:

The class cost is defined as the total of all costs with a cost category of Equipment, Operating, Miscellaneous, or Per Head multiplied by the number of class participants. Each provider is reported separately. The total costs for each provider are printed. Terminated employees and canceled classes are not reported.

Note: *Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.*

1. Enter the From (date) (optional)

Type the date the class starts in the From text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, the system date is used.*

For practice, type '01-01-1994'.

2. Enter the To (date) (optional)

Type the date the class stops in the To text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, training results for dates equal to or later than the From date are reported.*

To report on classes for a specific date, type the From date in both the From and To parameters.

For practice, leave this text box blank.

3. Select the Training Location (optional)

To report on a specific training location, select the training location.

Note: *If this list box is left blank, all training locations are reported.*

For practice, leave this list box blank.

4. Select the Provider (optional)

To report on a specific provider, select the provider.

Note: *If this list box is left blank, all providers are reported.*

For practice, leave this list box blank.

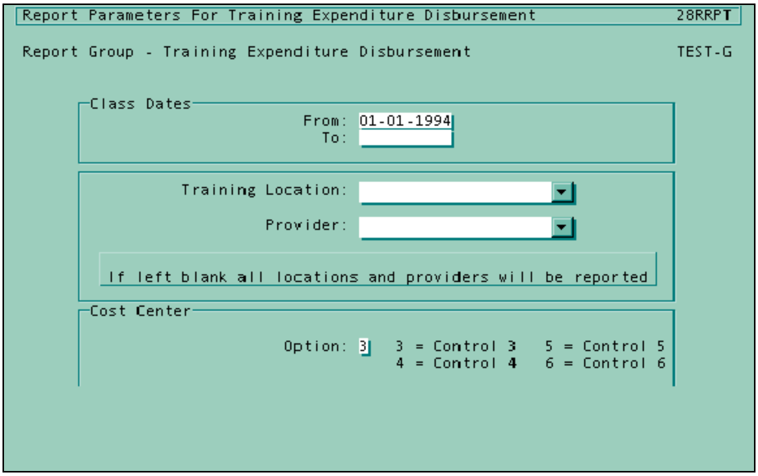
5. Enter the Cost Center Option

Enter the payroll level to be used as the cost center.

Type '3' for Control 3, '4' for Control 4, '5' for Control 5, or '6' for Control 6.

For practice, type '3'.

When completed, the report parameters may look similar to the example that follows:



6. Click Save or press Enter

Once it has been processed, this report summarizes the class costs by provider .

For practice, click Save or press Enter.

See also:

- Costing options ***(on page 225)***

For an explanation of costing options.

- Training Expenditure Disbursement report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Viewing training class costs to charge back to employees

To view training costs to charge back to employees using the Training Expenditure Charge-Back report (27RRPT), complete the report schedule by entering the following report parameters:

☞ *This report provides a total cost for each employee. Terminated employees and canceled classes are not included.*

Note: *Refer to the Using The Solution Series: Administrative Solutions documentation for procedural help in setting up a report group, adding a report to it, and entering the report parameters.*

1. Enter the From (date) (optional)

Type the date the class starts in the From text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, the system date is used.*

For practice, type '01-01-1994'.

2. Enter the To (date) (optional)

Type the date the class stops in the To text box. Type the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada) or DD-MM-CCYY or CCYYDDMM (elsewhere).

Note: *If this text box is left blank, classes on dates equal to or later than the From date are reported.*

To report on classes for a specific date, type the From date in both the From and To parameters.

For practice, leave this text box blank.

3. Select the Course (optional)

To report on a specific course, select the course.

Note: *If this list box is left blank, all courses are reported.*

For practice, leave this list box blank.

4. Select the Location (optional)

To report on a specific training location, select the training location.

Note: *If this list box is left blank, all training locations are reported.*

For practice, leave this list box blank.

5. Enter the Class (optional)

To report on a specific class, type the class sequence number.

Note: *If this text box is left blank, all training classes are reported.*

For practice, leave this text box blank.

6. Enter the Emp Nbr (optional)

To report on a specific employee, type the employee number.

Note: *If this text box is left blank, all employees are reported.*

For practice, leave this text box blank.

7. Enter the Cost Category Option (optional)

Type 'P' for participant costs or 'I' for individual costs.

Note: *If this text box is left blank, both categories are reported.*

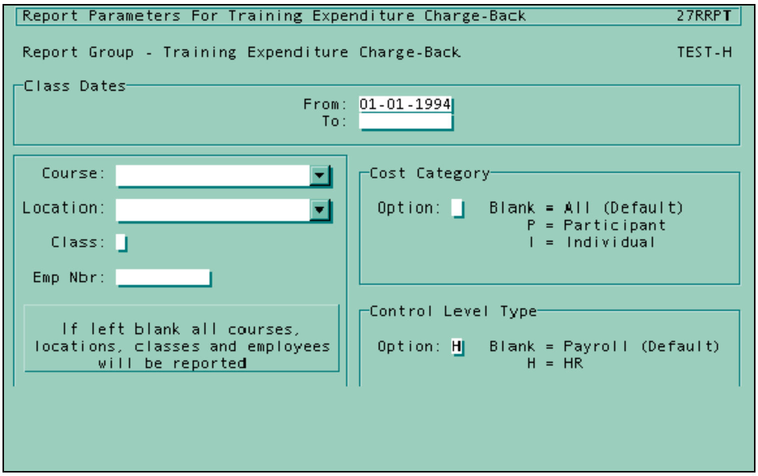
For practice, leave this text box blank.

8. Enter the Control Level Type Option

To report on HR organization levels, type 'H'. If HR organization levels are used, the Location % column on the report will be zero-filled.

Note: *To report on payroll levels, leave this text box blank.*

For practice, type 'H'.



9. Click Save or press Enter

Once it has been processed, this report lists class training costs that you may want to charge back to the employee.

For practice, click Save or press Enter.

See also:

- Costing options ***(on page 225)***

For an explanation of costing options.

- Training Expenditure Charge-Back report ***(see "Report Quick Reference" on page 243)***

For a description of this report and its business uses.

Extended Practice

1. George Welker's manager wants to track all costs associated with George's participation in the Flex Benefits class he is taking on January 14, 1997, including salary expense for the two days of training. Access the appropriate form to record these individual employee-level costs:

   - Air fare: 475.00
   - Lodging: 2 nights at 115.00 each
   - Salary: Allow George's salary segment to determine the amount of salary expense to be included in these costs.

2. Explain how the salary figure that appears was calculated. How can you verify that it is correct?

3. Click the Total Costs command button. What types of cost categories are included in the 'Total' that is displayed?

4. Return to the first panel and click the History command button. Review the information that displays. Click the Costs command button on this form. Where does it take you?

5. Check the Costs panel of the Course Directory for Flex Benefits. Are any of the costs listed there not reflected on the Employee Training Class Costs form (34RSCR)? If yes, can you explain why this is so?

Review of Questions Answered

1. What are the cost categories?

2. What are the different types of costs?

3. What are the options when recording costs?

P A R T 5

Appendices

In This Section

APPENDIX A

Report Quick Reference

In This Appendix

Introduction

This section provides a quick reference guide to Training Administration reports covered in this section.

Class Cancellation (31RRPT)

The Class Cancellation report (31RRPT) informs registered class participants that their class has been canceled. Reported information includes:

- Training Location
- Course
- Course Description
- Class
- Trainer
- Class Dates
- Class Times
- Prerequisites
- Coordinator Information

See also:

- Notifying students of a class cancellation ***(on page 105)***

To learn about informing registered class participants that the entire class has been canceled.

Class Cancellation (31RRPT)

```
CORPORATION  99   ACME MANUFACTURING                  Class Cancellation       REPT                                       PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2                                           31RR                  TIME 17:27:21 DATE 12-17-2002
Employee Name:     ALSON, GEOFFERY
Employee Number:   3003
Control 3:  Region 3030
Control 4:  Department 4040
Control 5:  Section 5050
Control 6:  Group 6060
    Please note that the following class has been canceled.
    The arrangements concerning this were:
Course:             SA0001
Description:        Salary Admin
Training Location:  Chicago
Class:              1
Class Dates:        19-Dec-1996 / 20-Dec-1996
Day(s):             Thurs                         Friday
Start:              09:00                         09:00
End:                17:00                         17:00
Location:           Chicago Training Ctr          Chicago Training Ctr
Room:               C                             C
Trainer:            Cyborg Systems
Coordinator:        MERTZ, LYNNE C.
Phone:              4507923                       Ext:  303
Fax Number:
Training Area:      Corporate Services
Prerequisites:
    Please refer to the training schedule for replacement classes.
```

Class Confirmation (23RRPT)

The Class Confirmation report (23RRPT) prints a confirmation letter for each employee registered to attend the training class. Each letter is printed on a separate page. Canceled classes are not included. Reported information includes:

- Controls 3-6
- Employee Name
- Employee Number
- Course
- Training Location
- Class
- Class Dates
- Time Schedule
- Prerequisites
- Date Registered
- Coordinator Information
- Trainer
- Coordinator Phone/Fax number
- Training Area

See also:

- Confirming class registrations - using confirmation letters ***(on page 172)***

To learn about printing a confirmation letter for each employee registered for the training class.

Class Confirmation (23RRPT)

```
CORPORATION  99   ACME MANUFACTURING                    Class Confirmation              REPT                                 PAGE     5
DIVISION     9999 PRODUCTION CTL 1-2                                                    23RR           TIME 18:02:12 DATE 12-17-2002
                                                        From: 01-Jan-1997  To:
Employee Name:     BROWN, WILLIAM R
Employee Number:      2005
Control 3:  Region 3388
Control 4:  Department 4488
Control 5:  Section 5508
Control 6:  Group 6608
    Please note that the employee stated above has been registered to attend the following class.
    The arrangements concerning this are:
Date Registered:   06-Dec-1996
Course:            111111                      Description:  Human Resource Mgmt
Training Location: Chicago
Class:             1
Class Dates:       01-Jan-1997 / 03-Jan-1997
Day(s):            MTW
Start:             09:00
End:               17:00
Location:          Chicago Training Ctr
Room:              B
Trainer:           JONES, JERRY
Coordinator:       AUSTIN, STEVEN
Phone:             4541865                    Ext: 1121
Fax Number:
Training Area:     Corporate Services
Pre-requisites:    1 Yr Mgmt Experience    Supervisory Course
    If you have any problems or questions and especially if you are unable to attend this class,
    please do not hesitate to contact the coordinator.
```

Class Evaluation (24RRPT)

The Class Evaluation report (24RRPT) prints an evaluation form for participants to fill out upon completion of the training class. This form can be used as a source document when entering the Process Class Results form (22RRPT).

This evaluation form is printed for employees registered for a class who have the Evaluation Required check box selected on the Class Schedule form (13RRPT). If desired, this evaluation form can be printed without including any employee information to allow anonymous evaluations.

Each evaluation form is printed on a separate page and canceled classes are not included. Reported information includes:

- Employee Name
- Employee Number
- Course
- Course Description
- Training Location
- Class
- Class Dates/Times
- Time Scheduled
- Coordinator Name
- Coordinator Phone

See also:

- Collecting class evaluations ***(on page 215)***

To learn about generating evaluation forms for students to complete.

Class Evaluation (24RRPT)

```
CORPORATION  99   ACME MANUFACTURING            Class Evaluation               REPT                          PAGE     10
DIVISION     9999 PRODUCTION CTL 1-2                                           24RR                 TIME 19:37:05 DATE 12-17-2002
                                                From: 01-Jan-2002  To:
Employee Name:
Employee Number:
Course:              111111
Description:         Human Resource Mgmt
Training Location:   Chicago
Class:               1
Class Dates:         01-Jan-2003 / 03-Jan-2003
Day(s):              MTW
Start:               09:00
End:                 17:00
Location:            Chicago Training Ctr
Room:                B
Trainer:             JONES, JERRY
Coordinator:         AUSTIN, STEVEN
Phone:               4541865                     Ext: 1121
Fax Number:
Training Area:       Corporate Services
Please circle appropriate rating:
  Instructor:              1-Excellent         2-Very Good          3-Fair                 4-Poor
  Subject Matter:          1-Excellent         2-Very Good          3-Fair                 4-Poor
  Class Facilities:        1-Excellent         2-Very Good          3-Fair                 4-Poor
  Refreshment Service:     1-Excellent         2-Very Good          3-Fair                 4-Poor
  Audio-Visual Present:    1-Excellent         2-Very Good          3-Fair                 4-Poor
  Class Materials:         1-Excellent         2-Very Good          3-Fair                 4-Poor
  Presentation Quality:    1-Excellent         2-Very Good          3-Fair                 4-Poor
  Class Effectiveness:     1-Excellent         2-Very Good          3-Fair                 4-Poor
  Met Objectives?:         1-Yes, All          2-None met           3-Most met             4-Very few
  Registration Process:    1-Excellent         2-Very Good          3-Fair                 4-Poor
Comments:
Please return this form to the Coordinator within two working days of your course completion.
```

Class Listing (32RRPT)

The Class Listing report (32RRPT) prints a listing of all employees registered for a training class. Each class is reported separately. The total number of participants for each class is reported. Reported information includes:

- Training Location
- Course
- Course Description
- Trainer Information
- Class/Class Dates
- Employee Name
- Employee Number
- Job Title
- Controls 3-6
- Work Phone/Extension

See also:

- Checking employee registrations on a report ***(on page 170)***

To learn about producing a list of all employees registered or wait-listed for a training class.

Class Listing (32RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                     Class Listing                  REPT                              PAGE     2
DIVISION     9999 PRODUCTION CTL 1-2                                                    32RR           TIME 17:48:07 DATE 12-17-2002
                                                         From: 01-Jan-2002  To:
Course:               FB001                              Description:  Flex Benefits
Training Location:    Chicago
Class:                1
Class Dates:          14-Jan-2003 / 15-Jan-2003
Trainer:              Cyborg Systems
Training Area:        IT Services
Employees:
Employee                                                                Controls
 Number     Employee Name            Job Title                    3     4     5     6       Work Phone      Extension
1114        WELKER, GEORGE W         ACCOUNTANT, CLASS II         3333  4444  5555  6666    312-4541865     3222
1234        AUSTIN, STEVEN           ASSEMBLY LINE WORKER         3030  4040  5050  6060    312-4541865     1121
2012        WARD, CHESTERON          ASSISTANT STATIONARY ENGINEER 3333  4444  5050  6060    312-4441680     1929
3001        BLOOM, ALEXANDER         ACCOUNTANT, CLASS II         3333  4444  5555  6666
3011        LAUGHLIN, SANDRA T.      PURCHASING MANAGER           3388  4488  5508  6060
   NUMBER OF EMPLOYEES:        5
```

Class Reminder (25RRPT)

The Class Reminder report (25RRPT) prints a letter to employees reminding them that they are registered to attend a training class. Each reminder letter is printed on a separate page. Information included on the letter includes:

- Controls 3-6
- Employee Name
- Employee Number
- Course
- Course Description
- Training Location
- Class
- Class Dates
- Time Scheduled
- Prerequisites
- Coordinator Information
- Trainer Information

See also:

- Confirming class registrations - using a report reminder ***(on page 174)***

To learn about using report reminders to confirm class registrations.

Class Reminder (25RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                          Class Reminder              REPT                                  PAGE     4
DIVISION     9999 PRODUCTION CTL 1-2                                                      25RR             TIME 18:51:25 DATE 12-17-2002
                                                              From: 01-Jan-2002  To:
Employee Name:    BLOOM, ALEXANDER
Employee Number:    3001
Control 3:  Region 3333
Control 4:  Department 4444
Control 5:  Section 5555
Control 6:  Group 6666
    Please note that your registration has been confirmed for the following class.
    The arrangements concerning this are:
Course:             FB001
Description:        Flex Benefits
Training Location:  Chicago
Class:              1
Class Dates:        14-Jan-2003 / 15-Jan-2003
Day(s):             Tues                         Wed
Start:              09:00                     08:30
End:                17:00                     16:00
Location:           Chicago Training Ctr      Chicago Training Ctr
Room:               C                         C
Trainer:            Cyborg Systems
Coordinator:        MERTZ, LYNNE C.
Phone:              4507923                   Ext:  303
Fax Number:
Training Area:      IT Services
Prerequisites:
    If you have any concerns regarding attendance or the class in general,
    please do not hesitate to contact the Coordinator.
```

Class Results (33RRPT)

The Class Results report (33RRPT) prints a summary of employee class performances. Each class is reported separately as is the total number of employees for each class. Reported information includes:

- Training Location
- Course
- Course Description
- Trainer
- Class/Class Dates
- Employee Name/Employee Number
- Mark (Major/Minor)
- Result
- Objectives Not Met
- Absence Information

See also:

- Viewing class results - on a report by class ***(on page 208)***
- Viewing class results - on a report by employee ***(on page 211)***

To learn about viewing training results by class on a report.

Class Results (33RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                     Class Results              REPT                                PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2                                                33RR            TIME 19:04:46 DATE 12-17-2002
                                                          From: 01-Oct-2002  To:
Course:             111111
Description:        Human Resource Mgmt
Training Location:  Chicago
Class:              1
Class Dates:        01-Oct-02/05-Oct-02
Trainer:            Chicago Staffed
Training Area:      Corporate Services
Employee                                            Mark                                                   Absence
Number     Name                           Maj    Min    Result              Objectives not Met        Days     Reason
2001       REYNOLDS, BRENDA                                                Overview of HR
                                                                           HR Legislative Issu
                                                                           Understand Policy
2002       BARNES, JOHNSON                                                 Overview of HR
                                                                           HR Legislative Issu
                                                                           Understand Policy
2003       CMEYLA, JANE                                                    Overview of HR
                                                                           HR Legislative Issu
                                                                           Understand Policy
1113       BARTHOLOW III, JONATHAN
1115       SWEENY, BARBARA
                                    Number of Employees:         5
```

Class Results Outstanding (45RRPT)

The Class Results Outstanding report (45RRPT) prints a listing of class participants who have no results recorded for training classes. Each training location is reported separately. Reported information includes:

- Training Location
- Class Dates
- Class
- Course
- Course Description
- Provider
- Employee Number
- Employee Name

See also:

- Viewing class results - on a report by class results outstanding ***(on page 213)***

To learn about viewing training results outstanding on a hard copy report.

Class Results Outstanding (45RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                    Class Results Outstanding     REPT                                PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2                                                  45RR             TIME 19:12:39 DATE 12-17-2002
                                                        From: 01-Jan-2001  To:
Training Location:  Chicago
Class Dates                Cls Course      Description              Provider                  Employee Number    Employee Name
14-Jan-2001 / 15-Jan-2001  1   FB001       Flex Benefits            Cyborg Systems    2012               WARD, CHESTERON
                                                                                      3001               BLOOM, ALEXANDER
01-Jan-2001 / 03-Jan-2001  1   111111      Human Resource Mgmt      JONES, JERRY      2010               PENDARVIS, MARTIN M.
01-Oct-2001 / 05-Oct-2001  1   111111      Human Resource Mgmt      JONES, JERRY      1113               BARTHOLOW III, JONATHAN
                                                                                      1115               SWEENY, BARBARA
                                                                                      2001               REYNOLDS, BRENDA
                                                                                      2002               BARNES, JOHNSON
                                                                                      2003               CMEYLA, JANE
```

Course Directory (44RRPT)

The Course Directory report (44RRPT) provides, by course, a printout of the information set up on the Course Directory form (10RSCR). Each course is reported separately. No totals are reported. Reported information includes:

- Course
- Course Description
- Course Costs
- Student Costs
- Minimum Students
- Maximum Students
- Type
- Duration (hours)
- Course Level
- Prerequisites
- Objectives
- Skills/Competencies
- Proficiencies
- Training Area

See also:

- Checking available courses ***(on page 67)***

To learn about viewing available training courses.

Course Directory (44RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                  Course Directory               REPT                              PAGE     3
DIVISION     9999 PRODUCTION CTL 1-2                                                 44RR           TIME 15:34:16 DATE 12-17-2002
                                                      As of: 01-Jan-2002
Course:             111111
Description:        Human Resource Mgmt
Effective Date:     01-Jan-1999
Training Area:      Corporate Services
Course Cost:        2,000.00
Student Cost:            .00
Min Students:       5
Max Students:       10
Type:               Lecture
Duration (Hours):   16.0
Training Units:     20
Course Level:       Introductory
Comments:           This course provides a Human Resource overview
Provider:           Chicago Staffed
  --- Prerequisites ---         ---- Objectives ----           - Skills/Competencies -        -- Proficiencies --
  1 Yr Mgmt Experience          Gain General Skills            Human Resource Manag              Expert
  Supervisory Course            Org Structures
```

Current Class Registration Status (30RRPT)

The Current Class Registration Status report (30RRPT) prints the registration status of current classes. Each training location is reported separately. Reported information includes:

- Training Location
- Course
- Course Description
- Course Type
- Class Duration (Hours)
- Class Cost
- Class Dates
- Class
- Number of Participants Registered

Class costs are the total of all course and class costs with a cost category of Equipment, Operating, and Miscellaneous.

Current Class Registration Status (30RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING             Current Class Registration Status REPT                                  PAGE     9
DIVISION     9999 PRODUCTION CTL 1-2             From: 01-Jan-1994 To:            30RR           TIME 19:44:46 DATE 12-17-1996
Training Location: Chicago
                                    Class   Duration    Class                                              Number of Participants
Course Description             Course Type    Hours       Costs      Class Dates          Class             Min    Max    Register
111111 Human Resource Mgmt   Lecture        24.0        2,150.00   01-Jan-97/03-Jan-97   1                 005    010    002
111111 Human Resource Mgmt   Lecture        16.0        1,600.00   01-Oct-94/05-Oct-94   1                 002    005    005
222222 Position Management   Lecture        16.0        1,445.00   10-Sep-94/15-Sep-94   2                 003    004    000
FB001  Flex Benefits         Lecture        16.0           50.00   14-Jan-97/15-Jan-97   1                 004    015    005
S00001 Supervisory Training  Lecture/Lab    16.0          250.00   10-Sep-94/15-Sep-94   2                 003    004    002
```

Employee Training History (21RRPT)

The Employee Training History report (21RRPT) lists employee training history and training class results. Each employee's training history is printed on a separate page. Reported information includes:

- Controls 3-6
- Employee Name
- Employee Number
- Training Location
- Course
- Course Description
- Class Dates
- Trainer
- Result
- Type

See also:

- Viewing class results - on a report by employee ***(on page 211)***
To learn about viewing training results by employee on a report.

- Employee Training History (21RRPT) - Example ***(on page 265)***
For more information about this report.

Employee Training History (21RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                       Employee Training History      REPT                                  PAGE     5
DIVISION     9999 PRODUCTION CTL 1-2                                                      21RR           TIME 19:07:21 DATE 12-17-1996
                                                           From: 01-Oct-1994  To:
Employee Name:    BROWN, WILLIAM R
Employee Number:    2005
Control 3:  Region 3388
Control 4:  Department 4488
Control 5:  Section 5508
Control 6:  Group 6608
Training Location:  Chicago
Course      Description       Class Dates                   Trainer          Result       Type
111111  Human Resource Mgmt   01-Jan-1997 /03-Jan-1997      JONES, JERRY     Passed       Required
```

Employee Training Schedule (20RRPT)

The Employee Training Schedule report (20RRPT) lists all classes an employee is scheduled to attend. Each employee's training schedule is printed on a separate page of the report. Reported information includes:

- Controls 3-6
- Employee Name
- Employee Number
- Training Location
- Course
- Class
- Class Dates
- Training Information
- Coordinator Phone

See also:

- Checking employee registrations on a report ***(on page 170)***

To learn about viewing a report listing all the classes for which an employee is scheduled.

- Employee Training Schedule (20RRPT) - Example ***(on page 267)***

For more information about this report.

Employee Training Schedule (20RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                    Employee Training Schedule       REPT                               PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2                                                      20RR            TIME 17:56:07 DATE 12-17-1996
                                                        From: 01-Jan-1997  To:
Employee Name:      PENDARVIS, MARTIN M.
Employee Number:  2010
Control 3:  Region 3388
Control 4:  Department 4488
Control 5:  Section 5508
Control 6:  Group 6608
Course    Description            Training Location    Class            Class Dates                   Trainer          Phone
111111    Human Resource Mgmt    Chicago              1                01-Jan-1997 / 03-Jan-1997     JONES, JERRY
```

Individual Trainer Schedule (38RRPT)

The Individual Trainer Schedule report (38RRPT) provides a schedule of a trainer's upcoming classes. Each trainer is reported separately. Totals are printed for duration in hours and number of participants. Reported information includes:

- Training Location
- Course
- Course Description
- Class Dates
- Duration (hours)
- Number of Participants

See also:

- Checking trainer schedules on paper - optional ***(on page 97)***

To learn about viewing a schedule report of a trainer's upcoming classes.

- Individual Trainer Schedule (38RRPT) - Example ***(on page 269)***

For more information about this report.

Individual Trainer Schedule (38RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                Individual Trainer Schedule        REPT                                PAGE     5
DIVISION     9999 PRODUCTION CTL 1-2                                                   38RR            TIME 16:52:29 DATE 12-17-1996
                                                    From: 01-Jan-1997  To:
Trainer:  Cyborg Systems
                                                               Training         Duration      Number of
Course  Description                 Class Dates                 Location         Class         (Hrs)              Participants
FB001   Flex Benefits               01-Apr-1997 /               New Orleans      1             16.0
FB001   Flex Benefits               14-Jan-1997 / 15-Jan-1997   Chicago          1             16.0               5
                                                                                 Totals:       32.0               5
```

Staff Training Schedule (22RRPT)

The Staff Training Schedule report (22RRPT) lists a schedule of class training by control level. This report includes the employee-level costs incurred from the training (cost categories of Participant [P] and Individual [I]). Cost totals are provided by staff location and each staff location is reported separately. Canceled classes are not included. Reported information includes:

- Staff Location
- Employee Name
- Employee Number
- Course
- Course Description
- Class
- Class Dates
- Trainer Information
- Cost

See also:

- Staff Training Schedule (22RRPT) - Example ***(on page 271)***

For more information about this report.

Staff Training Schedule (22RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                      Staff Training Schedule      REPT                               PAGE     3
DIVISION     9999 PRODUCTION CTL 1-2                                                   22RR            TIME 19:49:45 DATE 12-17-1996
                                                          From: 01-Jan-1994  To:
Staff Location:     Region 3388
Employee
  Number    Employee Name         Course Start/End Dates  Course  Course Description     Class        Trainer           Cost
3011        LAUGHLIN, SANDRA T.   14-Jan-1997 /15-Jan-1997 FB001   Flex Benefits         1            Cyborg Systems    306.00
2005        BROWN, WILLIAM R      01-Jan-1997 /03-Jan-1997 111111  Human Resource Mgmt   1            JONES, JERRY         .00
                                                                                                      Total Cost:       306.00
```

Student Program Status (26RRPT)

The Student Program Status report (26RRPT) lists, by program, all employees registered in the training program with class status information. Each program is reported separately. Reported information includes:

- Training Location
- Program
- Program Effective Date
- Employee Name
- Employee Number
- Course
- Course Description
- Start Date
- Class
- Class Status

See also:

- Checking program registrations on a report ***(on page 178)***

To learn about viewing a report of all employees registered for each training program.

- Student Program Status (26RRPT) - Example ***(on page 273)***

For more information about this report.

Student Program Status (26RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                       Student Program Status       REPT                              PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2                                                    26RR          TIME 19:01:31 DATE 12-17-1996
Program:     Basic Mgmt Program     Program Effective Date:   01-Sep-1994
Employee
 Number      Employee Name                 Course  Course Description        Start Date      Training Location   Class   Class Status
1113         BARTHOLOW III, JONATHAN       111111  Human Resource Mgmt       01-Oct-1994     Chicago             1
                                           S00001  Supervisory Training      10-Sep-1994     Chicago             2
1115         SWEENY, BARBARA               111111  Human Resource Mgmt       01-Oct-1994     Chicago             1
                                           S00001  Supervisory Training      10-Sep-1994     Chicago             2
```

Training Courses Needed by Course (47RRPT)

The Training Courses Needed by Course report (47RRPT) provides, by course, a listing of training courses that employees have requested. Each course is reported separately. No totals are reported. Terminated employees are not reported. Information reported includes:

- Course
- Course Description
- Employee Number
- Employee Name
- Training Required by
- Reason
- Status
- Registration Status

See also:

- Checking training requests - online by course ***(on page 141)***

To learn about viewing training requests by course on a hard-copy report.

- Training Courses Needed by Course (47RRPT) - Example ***(on page 275)***

For more information about this report.

Training Courses Needed by Course (47RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                     Training Courses Needed              REPT                                  PAGE      1
DIVISION     9999 PRODUCTION CTL 1-2                            by Course                 47RR            TIME 17:41:37 DATE 12-17-1996
                                                         From: 01-Jan-1997  To:
Course:       222222
Description:  Position Management
Employee                                           Training                                                        Registration
Number      Employee Name                          Required by     Reason                       Status             Status
1432        ISLEY, JEANETTE J.                     31-Dec-1997     Acquire competency
```

Training Courses Needed by Employee (48RRPT)

The Training Courses Needed by Employee report (48RRPT) provides, by employee, a listing of requests for training for that employee. Information reported includes all data entered on the Training Required form. Each employee is reported separately. No totals are reported. Terminated employees are not reported.

- Course
- Course Description
- Employee Number
- Employee Name
- Training Required By
- Reason
- Status
- Registration Status

See also:

- Checking training requests - on a report by employee ***(on page 146)***

To learn about viewing training requests by employee on a report.

- Training Courses Needed by Employee (48RRPT) - Example ***(on page 277)***

For more information about this report.

Training Courses Needed by Employee (48RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                Training Courses Needed              REPT                                   PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2                      by Employee                    48RR           TIME 17:44:51 DATE 12-17-1996
                                                    From: 01-Jan-1997  To:
Employee Number:    1432
Employee Name:    ISLEY, JEANETTE J.
                                    Training                                                                   Registration
Course   Description                Required by      Reason                     Status                     Status
222222   Position Management        31-Dec-1997      Acquire competency
```

Training Expenditure Charge-Back (27RRPT)

The Training Expenditure Charge-Back report (27RRPT) lists class training costs that can be charged back to the employee. You can specify what cost types are to be included. Payroll levels and splits are also listed. If desired, you can print Human Resource organization levels.

A total cost to charge back can be printed for each employee. Reported information includes:

- Controls 3-6 (Payroll or HR)
- Location %
- Training Location
- Course Description
- Class/Class Dates
- Participants
- Expenditures/Costs
- Registration Status

See also:

- Viewing training class costs to charge back to employees ***(on page 235)***

To learn about viewing training costs to charge back to employees.

- Training Expenditure Charge-Back (27RRPT) - Example ***(on page 279)***

For more information about this report.

Training Expenditure Charge-Back (27RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING              Training Expenditure Charge-Back    REPT                             PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2                                                  27RR           TIME 19:23:18 DATE 12-17-1996
                                                  From: 01-Jan-1994  To:
Course:             111111
Description:        Human Resource Mgmt
Class Dates:        01-Jan-1997 / 03-Jan-1997
Training Location:  Chicago
Class:              1
Employee                                --- Control Levels ---
Number       Employee Name              Three Four  Five  Six       Loc %    Expenditures        Cost
2005         BROWN, WILLIAM R           3388  4488  5508  6608      .00      Lodging             150.00
                                                                             Airfare             185.00
                                                                             Employee Total:     335.00
2010         PENDARVIS, MARTIN M.       3388  4488  5508  6608      .00      Airfare             560.00
                                                                             Employee Total:     560.00
                                                                             Class Total:        895.00
```

Training Expenditure Disbursement (28RRPT)

The Training Expenditure Disbursement report (28RRPT) summarizes class costs by provider. The class costs reported here are defined as those with a category of Equipment, Operating, Miscellaneous, or Per Head multiplied by the number of class participants. Each provider is reported separately and the total costs for each provider is printed. Reported information includes:

- Training Location
- Course
- Course Description
- Class
- Class Dates
- Employee Number
- Employee Name
- Class Cost
- Cost Center

See also:

- Viewing class costs by provider ***(on page 234)***

To learn about viewing training costs by provider.

- Training Expenditure Disbursement (28RRPT) - Example ***(on page 281)***

For more information about this report.

Training Expenditure Disbursement (28RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING              Training Expenditure Disbursement    REPT                              PAGE     9
DIVISION     9999 PRODUCTION CTL 1-2              From: 01-Oct-1994 To                 28RR          TIME 19:16:33 DATE 12-17-1996
Training Location: Chicago
                                                                            Cost    Registered   Employees
    Course  Description         Class Dates              Class Cost   CLS  Center  Number       Name
    111111  Human Resource Mgmt  01-Jan-97/03-Jan-97      2,150.00     1            2005         BROWN, WILLIAM R
                                                                                    2010         PENDARVIS, MARTIN M.
Total Disbursement for Provider Chicago Staffed           2,150.00
    111111  Human Resource Mgmt  01-Oct-94/05-Oct-94      1,600.00     1            2001         REYNOLDS, BRENDA
                                                                                    2002         BARNES, JOHNSON
                                                                                    2003         CMEYLA, JANE
                                                                            01      1113         BARTHOLOW III, JONATHAN
                                                                            01      1115         SWEENY, BARBARA
Total Disbursement for Provider AMA                       1,600.00
    FB001   Flex Benefits        14-Jan-97/15-Jan-97         50.00     1    01      1114         WELKER, GEORGE W
                                                                            01      1234         AUSTIN, STEVEN
                                                                                    2012         WARD, CHESTERON
                                                                                    3001         BLOOM, ALEXANDER
                                                                                    3011         LAUGHLIN, SANDRA T.
Total Disbursement for Provider Cyborg Systems               50.00
```

Training Location Activity (34RRPT)

The Training Location Activity report (34RRPT) prints a listing of scheduled classes by training location. Totals are provided for each training location. Reported information includes:

- Training Location
- Course
- Course Description
- Class
- Class Dates
- Trainer
- Duration (hours)
- Number of Participants
- Training Hours

See also:

- Training Location Activity (34RRPT) - Example ***(on page 283)***

For more information about this report.

Training Location Activity (34RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                Training Location Activity         REPT                                  PAGE     9
DIVISION     9999 PRODUCTION CTL 1-2                From: 01-Jan-1994 To              34RR           TIME 19:53:51 DATE 12-17-1996
Training Location: Chicago
                                                                                        Duration                     Training
    Class Dates         Course  Class  Course Description         Trainer               Hours     Participants       Hours
01-Jan-97/03-Jan-97     111111  1    Human Resource Mgmt          JONES, JERRY          24.0      002                48.0
01-Oct-94/05-Oct-94     111111  1    Human Resource Mgmt          JONES, JERRY          16.0      005                80.0
10-Sep-94/15-Sep-94     222222  2    Position Management          JONES, JERRY          16.0      000                  .0
14-Jan-97/15-Jan-97     FB001   1    Flex Benefits                Cyborg Systems        16.0      005                80.0
10-Sep-94/15-Sep-94     S00001  2    Supervisory Training                               16.0      002                32.0
                                                       Total Duration Hours:      88.0   Total Training Hours:240.0
```

Training Schedule (29RRPT)

The Training Schedule report (29RRPT) prints a schedule of classes that have been scheduled for a training location. Each training location is reported separately. Reported information includes:

- Training Location
- Course
- Course Description
- Class Duration (Hours)
- Participant Cost
- Class Dates
- Class
- Comments

Participant Cost is the total of course and class costs with a cost category of Participant, Individual, and Per Head.

See also:

- Checking what classes have been set up - using a report - optional

To learn about checking the training schedule on a report.

- Training Schedule (29RRPT) - Example ***(on page 285)***

For more information about this report.

Training Schedule (29RRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING              Training Schedule         REPT                                        PAGE     7
DIVISION     9999 PRODUCTION CTL 1-2              From: 01-Jan-1997 To:      29RR                     TIME 17:36:21 DATE 12-17-1996
Training Location: Chicago
                                             Class          Participant  Class
Course   Description          Course Type   Duration Hrs   Cost         Dates                 Class   Comments
111111   Human Resource Mgmt   Lecture       24.0              .00       01-Jan-97/03-Jan-97   1      This class is an HR overview.
FB001    Flex Benefits         Lecture       16.0           306.00       14-Jan-97/15-Jan-97   1      Provides foundation for impl
                                                                                                     ementing Flex Benefits.
```

APPENDIX B

Practice and Review Answers

In This Appendix

Introduction

This appendix provides answers for the Apply the Concept practices, as well as the Extended Practice and Review of Questions Answered that are included at the end of each instructional chapter.

Implementing Training Administration

Apply the Concept

1. Describe the two primary differences between the Control Numbers as used in Training Administration and those used on other system tables.

   a) Entry on the Organization-To-Rules Cross-Reference For HR form (AX-SCR) is only two alphanumeric characters versus four.

   b) Rather than displaying the Control Number as a text box in the body of each table form, the Training Administration forms automatically generate the Control Number (from the Organization-To-Rules Cross-Reference For HR form (AX-SCR)) and display it in the form heading.

2. How many different types of Training Administration option lists are there? Give a few examples of each type.

   There are four types of Training Administration option lists:

   a) Course/Class option lists

   Examples: Level Required (TR01), Course Objectives (TR03), Course Results(TR09), Training Location (TR13), Course Subjects (TR30)

   b) Provider/Coordinator option lists

   Examples: Provider Index (TR38), Provider Type (TR07), Coordinator Index (TR27)

   c) Evaluation option lists

   Examples: Evaluation Category (TR39), Evaluation 1(TR17), Evaluation 2 (TR18)

   d) Additional option lists

   Examples: Registration Status (TR16), Training Required Reason (TR28), Registration Options (TR34)

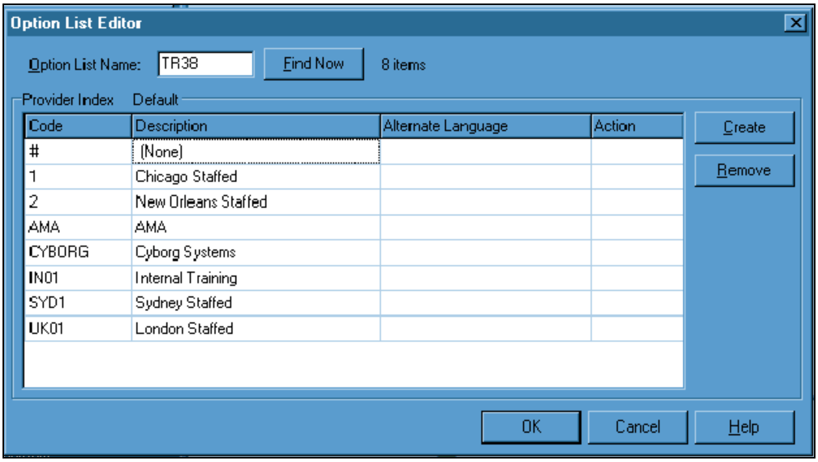
3. If your organization has five separate organizations but the training function is administered centrally using all the same tables and so forth, what value(s) would be entered on each organization's Organization-to-Rules Cross-Reference For HR form (AX-SCR) in the Training Admin text box?

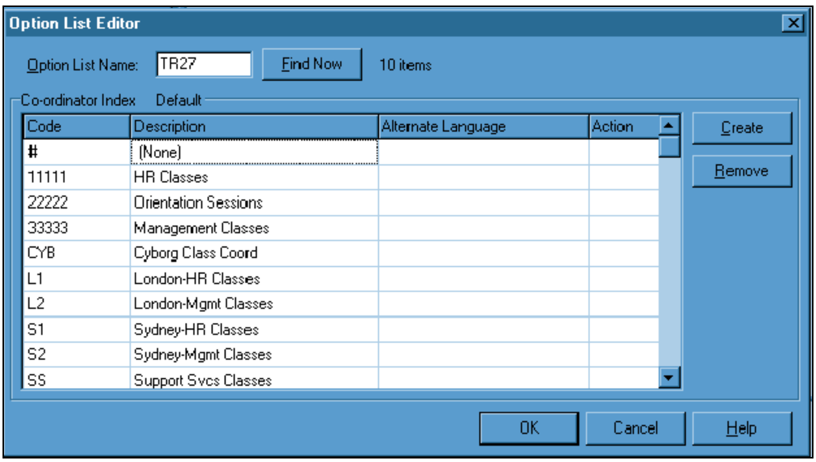
   Just one Control Number would be used, with each organization pointing to that same value.

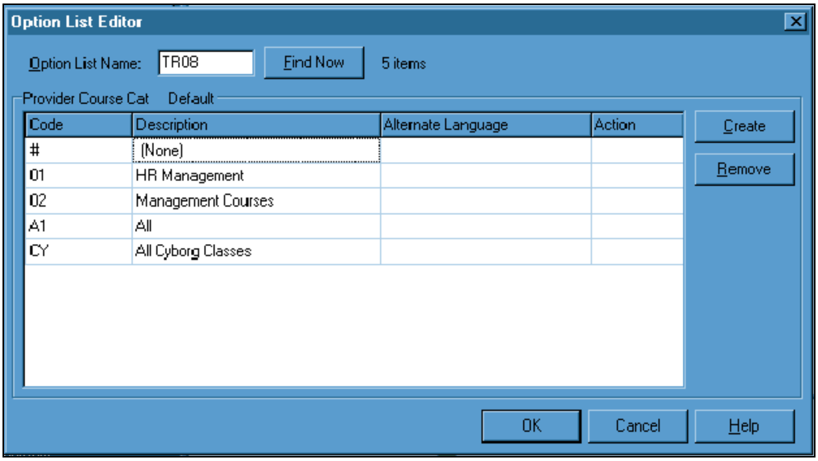
Extended Practice

Add the following codes to the option lists below using the Option List Editor (CSUPDT):

Option List	Code	Description
Provider Index (TR38)	CYBORG	Cyborg Systems
Coordinator Index (TR27)	CYB	Cyborg Class Coord
Provider Course Category (TR08)	CY	All Cyborg Classes







Review of Questions Answered

1. How are Control Numbers set up in Training Administration?

   The two-character Training Administration Control Number is defined on the Organization-To-Rules Cross-Reference for HR form (AX-SCR). Type the two-character Training Administration Control Number in the Training Admin text box. Rather than displaying the Control Number as a text box in the body of each table form, the Training Administration forms automatically display it the form heading.

2. How are Training Administration option lists set up?

   Using the Option List Editor (CSUPDT), production option lists can be modified to meet your company's requirements. Review the 38 sample option lists that are delivered with Training Administration and, except for a few option lists that should not be modified (as indicated in this chapter), modify the others to reflect the values unique to your organization.

Setting Up and Maintaining Training Courses

Apply the Concept

1. Define the term *course.*

   A course is a separate unit of instruction in a subject. For example, 'Using The Solution Series: Administrative Solutions' is a course. This may be applied to a training course provided internally or externally.

2. Define the term class.

   A class is an occurrence of a course that is specific to a location and a date. For example, 'Using The Solution Series: Administrative Solutions' on Thursday, December 21, in Chicago is a class of the course 'Using The Solution Series: Administrative Solutions'.

3. Define the term *program.*

   A program is a series of classes. For example, 'The Cyborg Training Schedule for January-June 1996' may be a program consisting of eight different classes.

4. What three types of costs can be recorded in Training Administration?

   Costs are recorded at three different levels within Training Administration: course, class, and employee. In addition to the different levels of cost, there are various categories to further define those costs. These are defined in Cost Category option list (TR14) on the Course Directory: Costs form (10RSCR). The categories of 'Equipment', 'Individual', and 'Operating' are carried through to the class level. Categories of 'Per Head' and 'Participant' indicate employee-level costs.

5. List two examples of employee-level costs.

   Categories of 'Per Head' and 'Participant' indicate employee-level costs.

6. What are the prerequisites to setting up training course details?

   Before any data are entered, you must ensure that all option lists are populated with course details, prerequisites, and objectives.

7. List two examples of skills/competencies that can be defined on the system.

   The achievement of certain skills (such as Claim Accounting, Procedure Writing, Project Presentation, Banking Regulations) can be defined in the Skills option list (MP01).

8. Consider the way course information is currently managed/tracked in your organization and determine whether it will be useful for you to use all or some of the optional panels included on the Course Directory form (10RSCR). Which ones will be most beneficial to you?

Your answer will be specific to your organization.

9. When setting up a new training course coordinator who is an employee (versus an external coordinator), what if anything do you do differently, when entering data on the Coordinator Index form (14RSCR)?

   By entering the employee's organization and Employee Number where indicated, the employee coordinator's name (as well as phone number and extension, assuming these text boxes were entered on the system) will be filled in automatically after clicking Save. If the coordinator is external, you must enter this information if you wish to view it online.

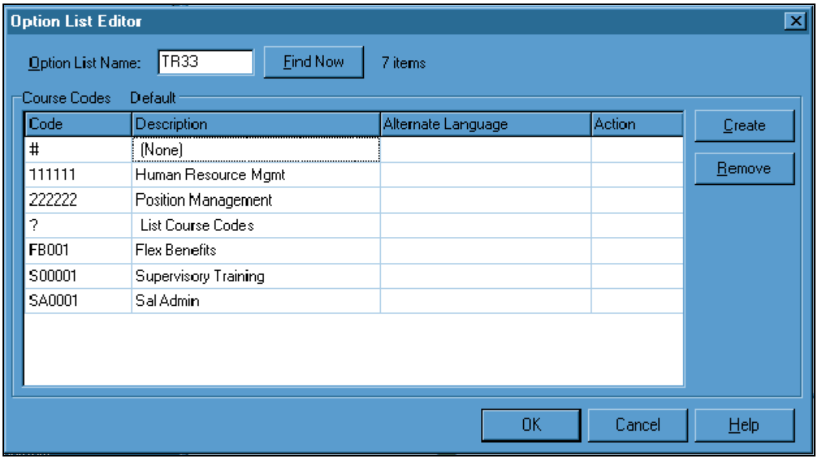
10. Consider how your organization might use the Provider Index and Coordinator Index and describe how you might customize these option lists to meet your needs.

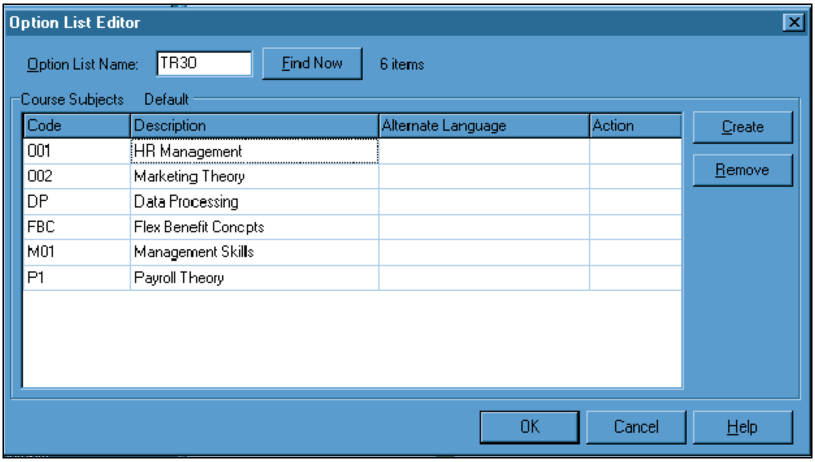
    Your answer will be specific to your organization.

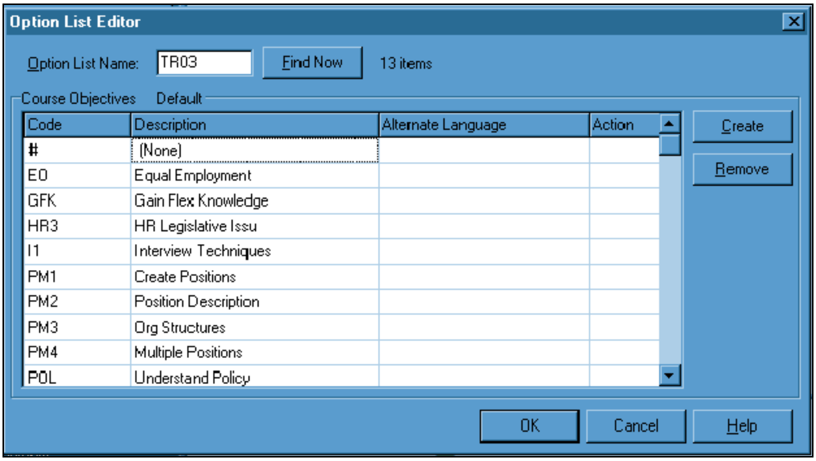
Extended Practice

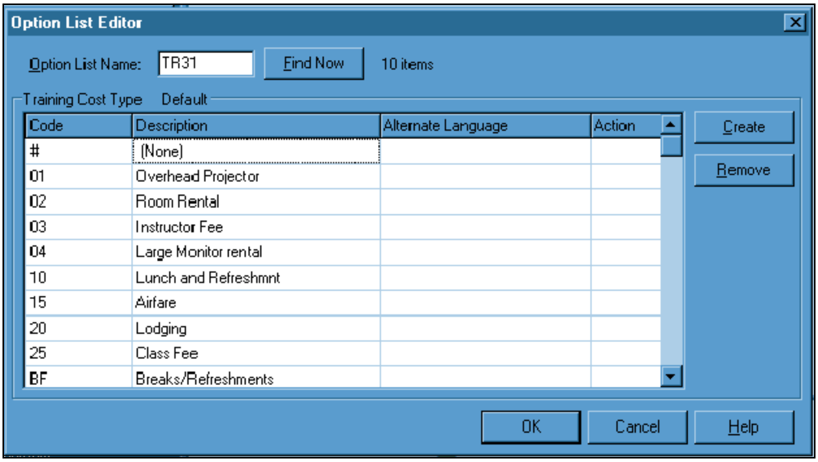
1. Add these additional Options to the option lists listed using the Option List Editor (CSUPDT):

Option List	Code	Description
Course Options (TR33)	FB001	Flex Benefits
Course Subjects (TR30)	FBC	Flex Benefit Concpts
Course Objectives (TR03)	GFK	Gain Flex Knowledge
Training Cost Type (TR31)	BF	Breaks/Refreshments


Option List Editor
Option List Name: TR33
Find Now
7 items
Course Codes
Default
Code
Description
Alternate Language
Action
#
(None)
111111
Human Resource Mgmt
222222
Position Management
?
List Course Codes
FB001
Flex Benefits
S00001
Supervisory Training
SA0001
Sal Admin
Create
Remove
OK
Cancel
Help


Option List Editor
Option List Name: TR30
Find Now
6 items
Course Subjects
Default
Code
Description
Alternate Language
Action
001
HR Management
002
Marketing Theory
DP
Data Processing
FBC
Flex Benefit Concpts
M01
Management Skills
P1
Payroll Theory
Create
Remove
OK
Cancel
Help

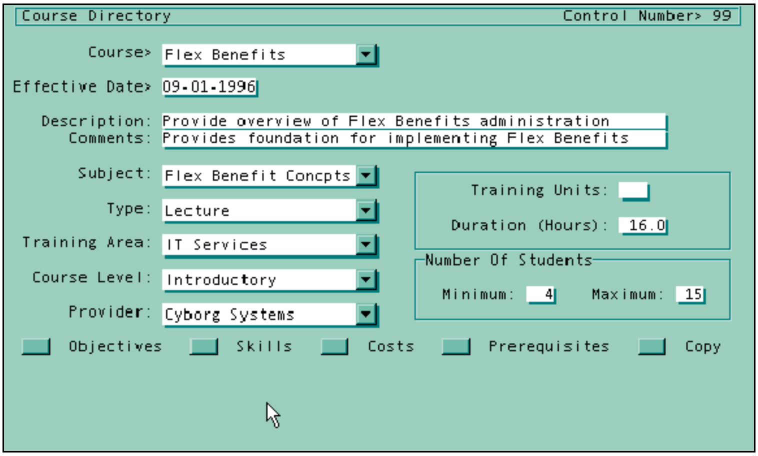




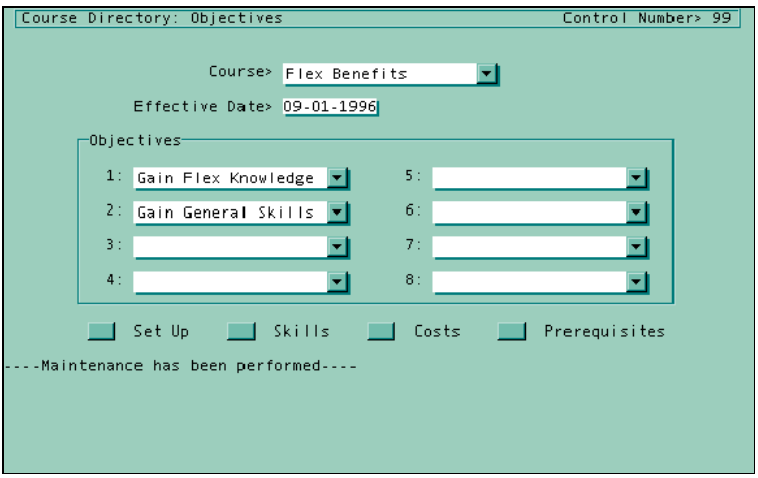
2. Set up a new course with these characteristics:

Text box	**Entry**
Course	Flex Benefits
Effective Date	September 1, 1996
Description	Provides an overview of Flex Benefits administration.
Comments	Provides a foundation for implementing Flex Benefits.
Subject	Flex Benefits Concpts

Text box	Entry
Type	Lecture
Training Area	IT Services
Course Level	Introductory
Provider	Cyborg Systems
Training Units	Leave Blank
Duration	16.0 Hours
Number of Students	Between 4 and 15

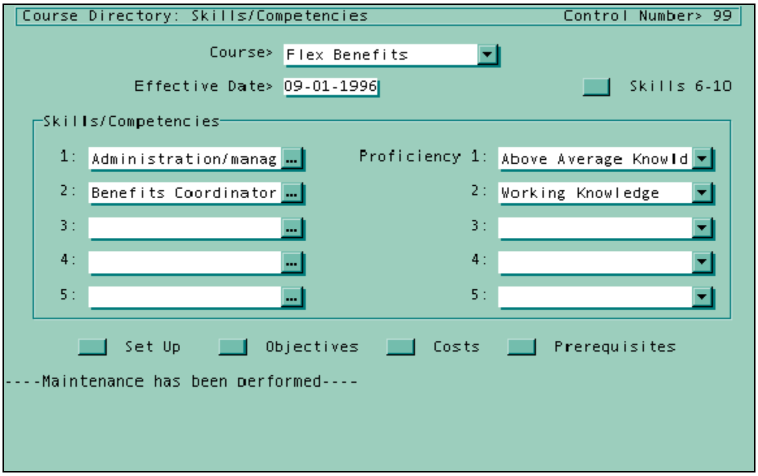


3. Select two appropriate course objectives for this course from the option lists.



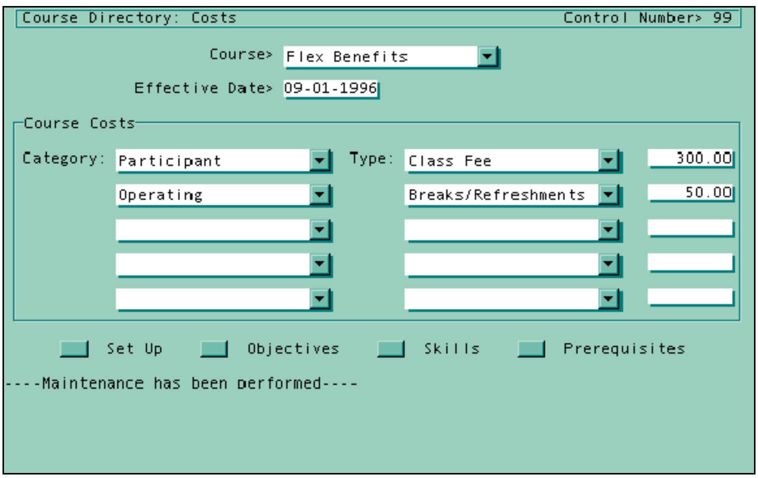
4. Select these skills and proficiency levels for Flex Benefits:

Skills/Competencies	Proficiency
Administration/manag	Above Average Knowld
Benefits Coordinator	Working Knowledge

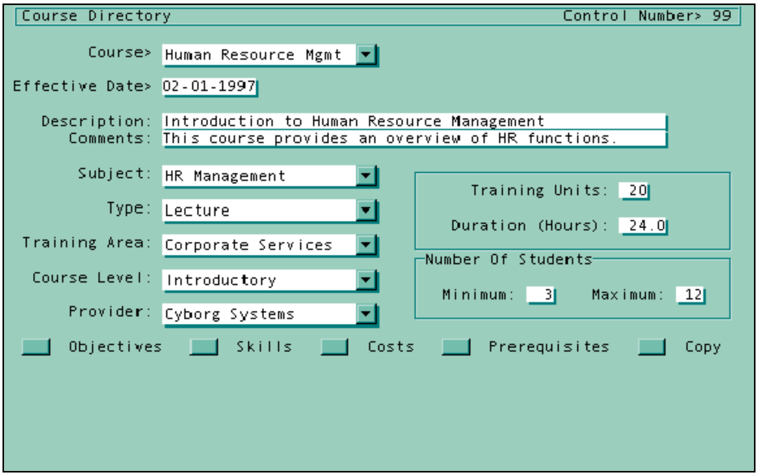


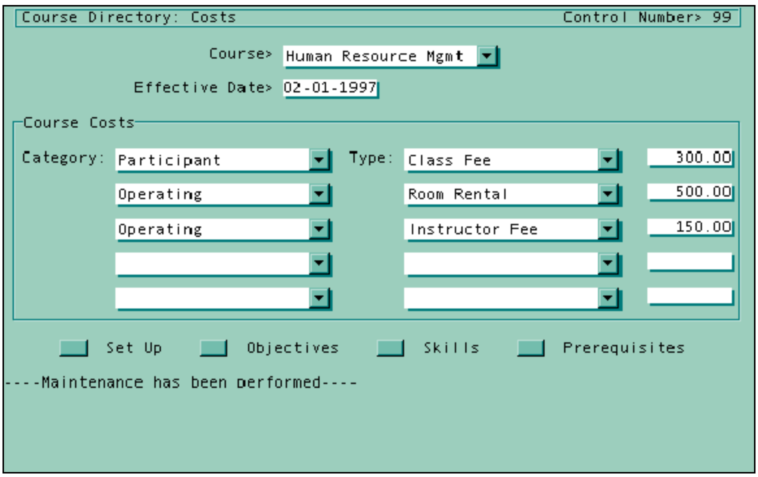
5. Set up these course-related costs for Flex Benefits:

Category	Type	Amount
Participant	Class Fee	300.00
Operating	Breaks/Refreshments	50.00



6. Return to the Set Up panel and select the course 'Human Resource Management' dated '01-01-1994'. Copy this same course with a new effective date of February 1, 1997. When the Set Up form is returned, modify the Provider list box to an entry of 'Cyborg Systems' and change the maximum number of students to '12'. Update the Instructor Fee cost to 1500.00 on the appropriate panel.

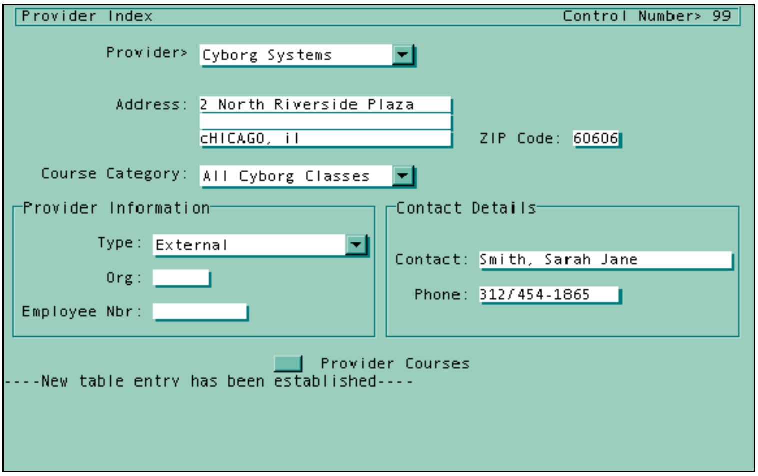


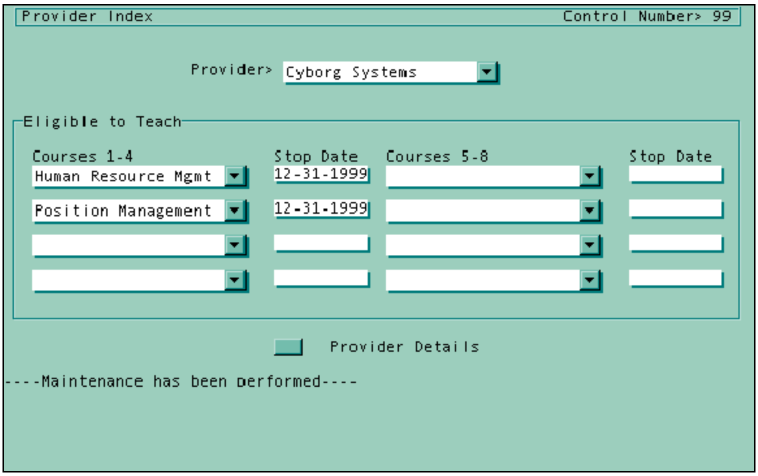


7. Set up a Course Development Costs form (11RSCR) for the Flex Benefits course, indicating a fee of 7500 for developing the course manual.

8. Set up a Flex Benefits course provider with these characteristics:

Text box	**Entry**
Provider	Cyborg Systems
Address, ZIP code	2 North Riverside Plaza, Chicago, IL 60606
Course Category	All Cyborg Classes
Type	External
Org	Leave Blank
Employee Nbr	Leave Blank
Contact	Smith, Sarah Jane
Phone	312/454-1865
Courses 1-4	HR Mgmt and Position Management courses
Stop Date	December 31, 1999 for both

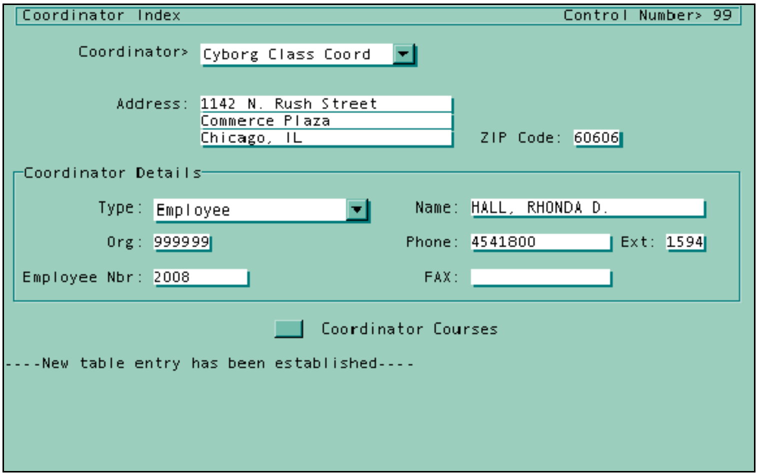


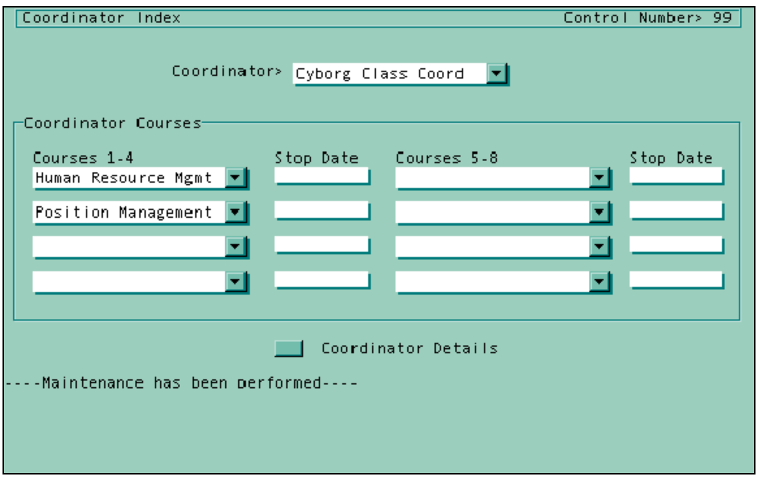


9. Set up a Flex Benefits course coordinator with these characteristics:

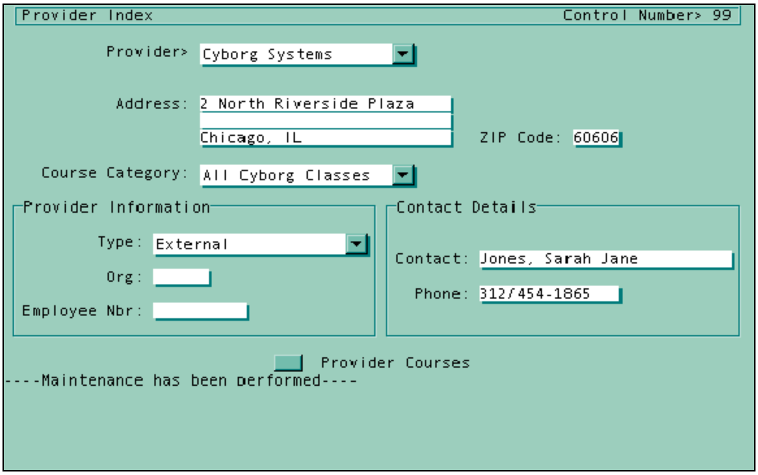
Text box	Entry
Coordinator	Cyborg Class Coord
Address	1142 N. Rush Street, Commerce Plaza, Chicago, IL 60606
Type	Employee
Name	Leave blank (self-populating)

Text box	Entry
Org	999999
Phone	Leave blank (self-populating)
Employee Nbr	2008
FAX	Leave blank
Courses 1-4	HR Mgmt and Position Management courses
Stop Date	Leave blank

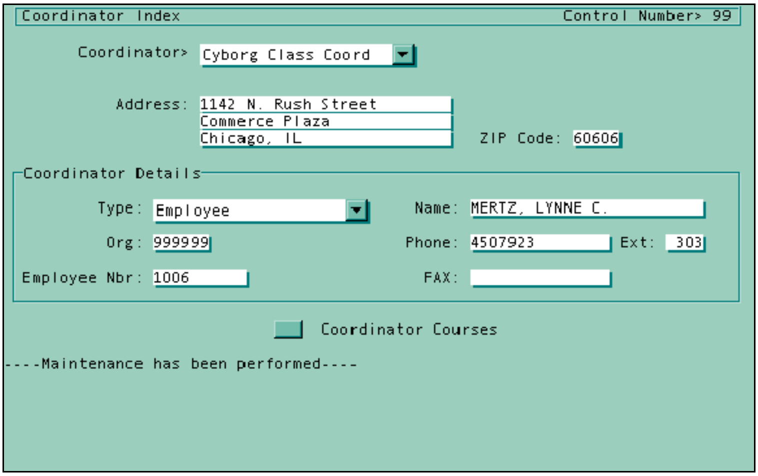




10. The contact listed for provider 'Cyborg Systems' just got married. Change the contact details to reflect a name change to 'Jones' and a new phone number of '312/252-6888'.



11. The Cyborg Class Coordinator just terminated her employment. The new Cyborg Class Coordinator is Employee '1006'. Make this change on the appropriate form.



Review of Questions Answered

1. What is a course?

   A course is a separate unit of instruction in a subject. For example, 'Introduction to Using The Solution Series: Administrative Solutions' is a course. This may be applied to a training course provided internally or externally.

2. What are training objectives and how are they used?

   The provider identifies an objective for each course. It may be a skill, a level of competency, and so forth. All courses set up on Training Administration can have training objectives associated with them. These can then be matched against an employee's training objective to find the best course for the employee to attend. The Course Objectives option list (TR33) can be modified to reflect a full range of course objectives your organization wishes to establish. These are tied to the different courses via the Objectives panel of the Course Directory form (10RSCR). Establishing course objectives is optional. However, doing so allows you to match these training objectives against an employee's personal developmental training objectives to find the best course for the employee to attend.

3. What types of costs can be recorded?

   Course-, class-, and employee-level costs can be recorded. Use the Course Directory form (10RSCR) Costs panel to enter course costs. Up to five cost categories and cost types can be entered from the drop-down lists available. The category, type, and cost amount on each line are tied together and define a cost description and amount. Defining course cost information is an optional step.

5. How are prerequisites and skills used?

   A prerequisite may be attendance at a particular course, proven mastery of certain skills and abilities, level of experience and so forth. Using the Prerequisites panel of the Course Directory form (10RSCR) to define skills and course-level requirements for a particular course is optional. If you use this panel, it is important to populate the Course Prerequisites option list (TR32) and to understand the relationship between prerequisites and skills as defined in this chapter.

6. How are coordinators and providers used?

   Details about course providers and coordinators can be defined in forms and then recorded at the class level to help organizations capture all training-related data. Queries and reports are available to provide administrative support and create management tools that determine instructors' schedules, courses taught, dates booked, and so forth, and that produce class confirmation letters containing provider and coordinator information along with all other relevant class information.

Setting Up and Maintaining Training Classes

Apply the Concept

1. Describe how the use of delivered online query forms such as the Individual Trainer Schedule inquiry form (55RSCR) and the Training Schedule inquiry form (53RSCR) can be helpful to you.

   These queries allow you to quickly view online all classes a trainer is scheduled to teach and to display an online view of upcoming training classes. You can display all upcoming classes, classes for a specific course, classes as of a specific date, classes at a specific training location, or any combination of these.

2. Describe the benefit to be realized by optionally printing hard-copy reports such as the Individual Trainer Schedule report (38RRPT) and Training Schedule report (29RRPT).

   These are the hard-copy versions of the two queries identified in question 1. The Individual Trainer Schedule report (38RRPT) provides a printed schedule of a trainer's upcoming classes. Data included are training location, course, course description, class dates, duration in hours, and number of participants. The Training Schedule report (29RRPT) lists all classes that have been scheduled for a training location. Report Scheduler parameters allow flexibility in selecting options to control what and how data are captured on the reports. Hard-copy reports are especially helpful to give to individuals who need this information but who do not have access to the system.

3. What types of specific class costs would you set for a new training course in your organization called 'Managing Diversity'? How would these costs differ from those established at the course level?

   Your answer will be specific to your organization.

4. Consider how you intend to use the Class Maintenance Facility form (18RSCR) in your organization. Who will be responsible for this task?

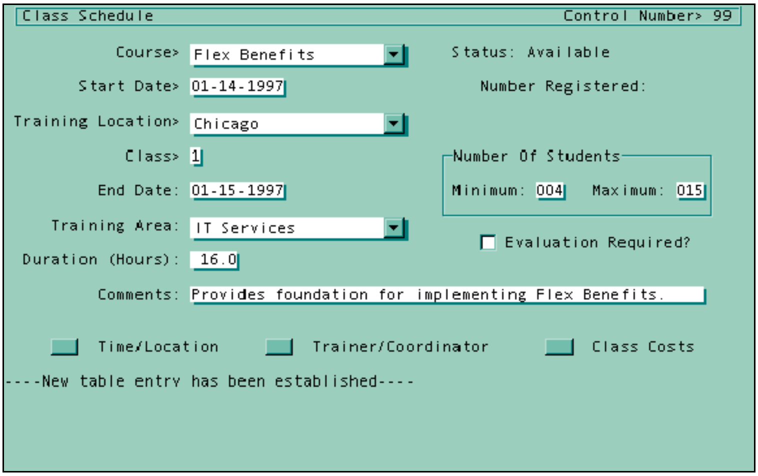
   Your answer will be specific to your organization.

Extended Practice

1. Set up a training class with the following characteristics:

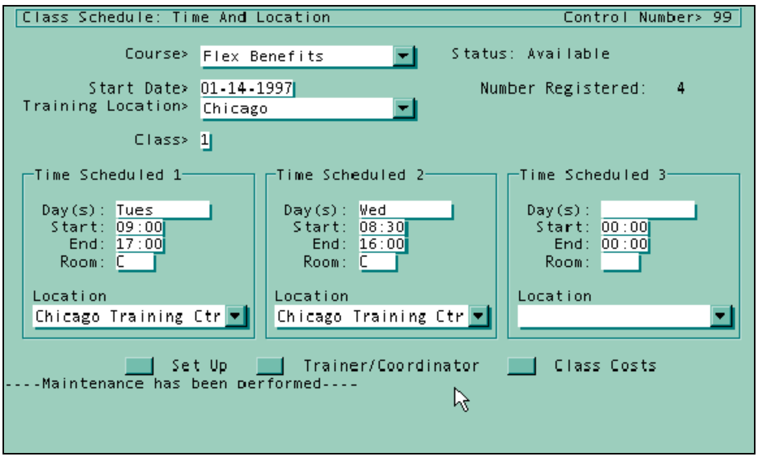
   - Course of 'Flex Benefits'
   - Start Date of '01-14-1997'
   - Training Location of 'Chicago'
   - Class '1'
   - End Date of '01-15-1997'
   - Select 'Evaluation Required'

   The remaining text boxes on this panel will populate from the Course Directory form (10RSCR).



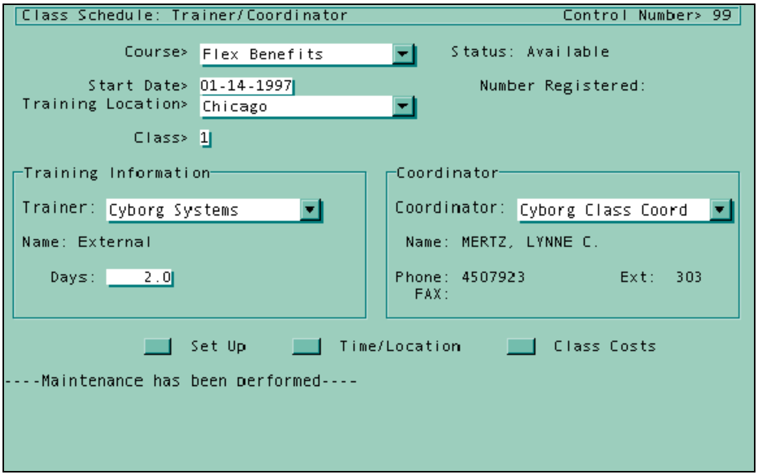
Time and Location

- Days Scheduled of Tuesday and Wednesday
- First day 9:00-5:00; Second day 8:30-4:00
- Location is Chicago Training Center, Room C

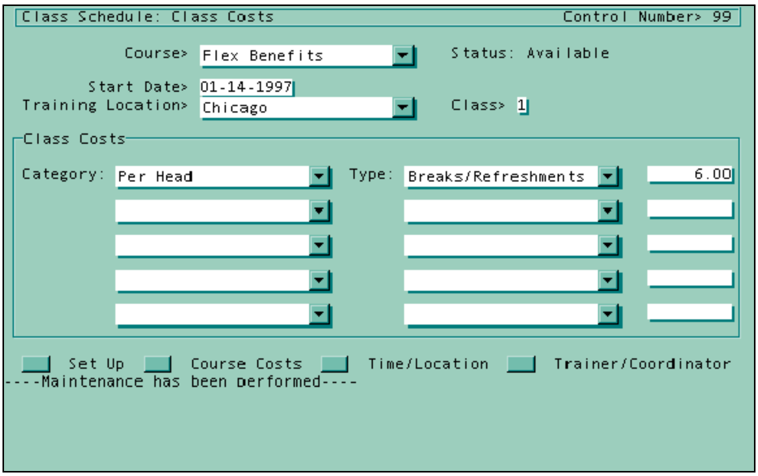


Trainer/Coordinator

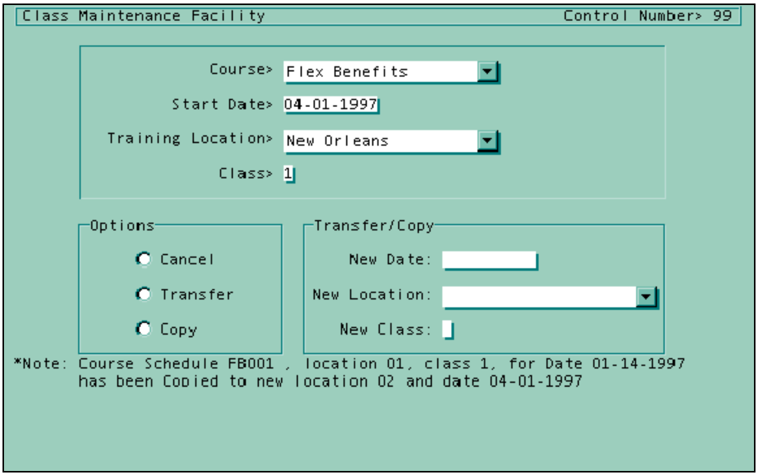
- Trainer is Cyborg Systems
- Days = 2
- Coordinator is Cyborg Class Coordinator



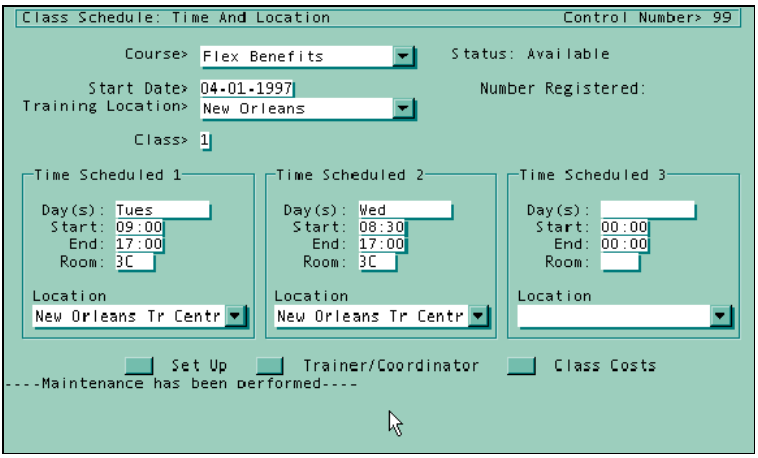
- Class Costs
- Class Cost for Breaks/Refreshments is 6.00 per head.



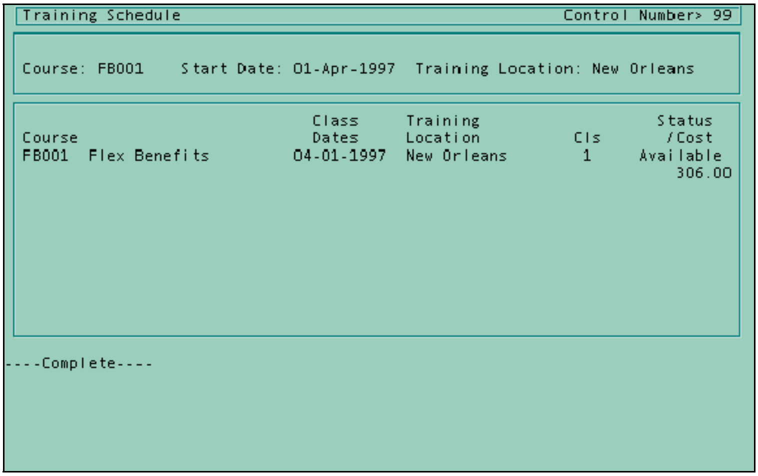
2. Copy the class you just established to another class on April 1-2, 1997, in New Orleans.



3. Change this New Orleans class in the following manner:
   - Minimum Number of Students is now 5.
   - Classes will be held in Room 3C of the New Orleans Training Center.
   - Wednesday's session is scheduled to end at 5:00 PM.



4. Use the Training Schedule form (53RSCR) to check that the two classes added in this practice session have actually been set up on the file correctly.



Review of Questions Answered

1. What is a class?

   A class is an occurrence of a course that is specific to a location and a date. For example, 'Introduction to Using The Solution Series: Administrative Solutions' on Thursday, December 21, in Chicago is a class of the course 'Introduction to Using The Solution Series: Administrative Solutions'.

2. What four text boxes define a training class?

   The four required text boxes that define a training class are Course, Start Date, Training Location, and Class.

3. What tool can be used to display all available course options and courses?

   The List Course/Class Options selection in the drop-down box of the Course Options option list (TR33) can be used to access the Course Selection Menu to see a full display of all available course options and courses. You can select a course from this menu and return to your initial form to complete your entry of class details.

4. What are the available class costing options?

   Class costs can be set up on the Class Costs panel of the Class Schedule form (13RSCR). This is an optional panel. Costs specified on this panel are different from those specified at the course level on the Course Directory form (10RSCR). While costs that are standard for all classes within a course are recorded at the course level, costs (such as instructor fees for different instructors) might vary at the class level and are recorded here. Costs can also be set up at the employee level using the Employee Training Class Costs form (34RSCR).

5. What types of maintenance can be performed on classes?

The Class Maintenance Facility form (18RSCR) can be used to transfer, copy, and cancel training class information.

<u>Transferring</u> a class moves the class to a new date or location. All currently registered and wait-listed employees are moved to the new class.

<u>Copying</u> a class copies all class information to a new date or location. Employee records are not changed.

<u>Canceling</u> a class cancels any employee registrations for that class and removes any employees from the wait list for that class.

Setting Up and Maintaining Training Programs

Apply the Concept

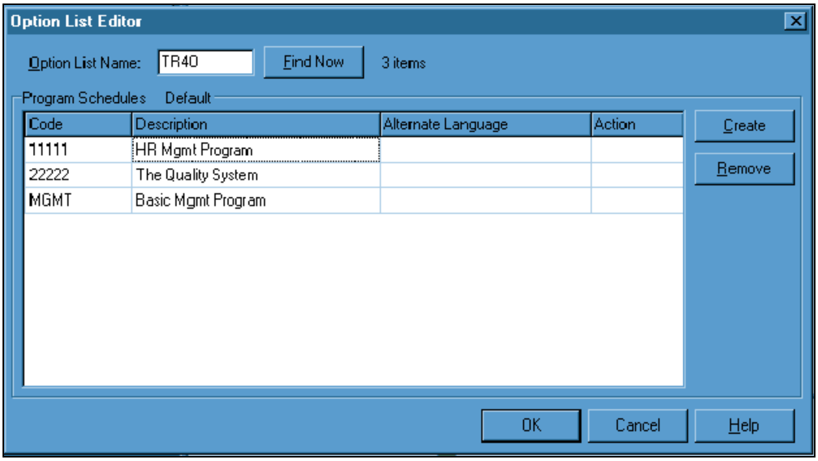
1. Consider if your company would need to set up training programs. How would this help your employees? How would it help management?

   Your answer will be specific to your organization.

Extended Practice

1. You have determined you need to set up a new training program for your employees. Using the Option List Editor (CSUPDT), add a code to the Program Schedules option list TR40:

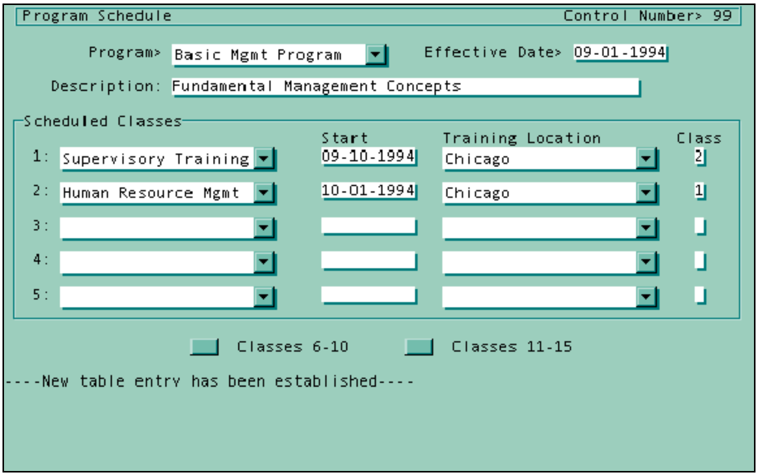
   MGMT Basic Mgmt Program



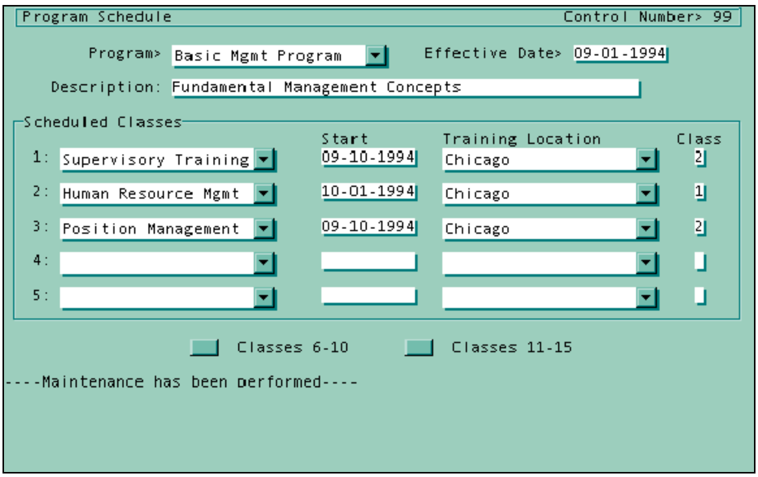
2. Using an effective date of September 1, 1994, set up a program called 'Basic Mgmt Program' to include these classes:

Supervisory Training	09/10/1994	Chicago Class 2
Human Resource Mgmt	10/01/1994	Chicago Class 1

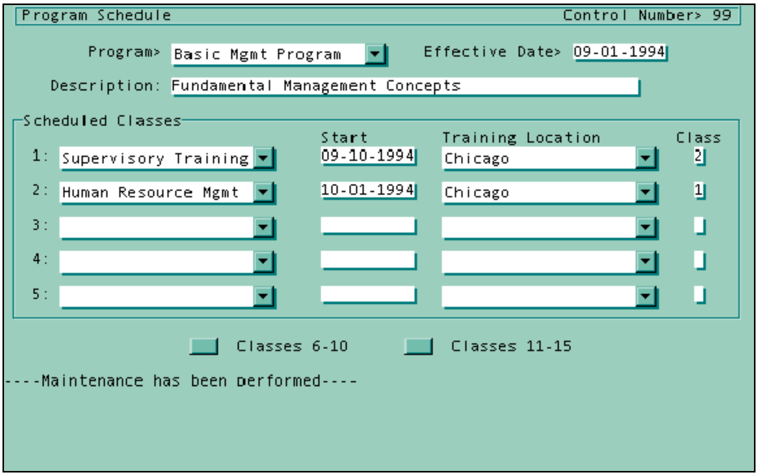
   This Basic Management program will be expanded as needed in the future.



3. Your company needs to add another class to the above program:
   Position Management 09/10/1994 Chicago Class 2



4. You have just been told to delete a class from the above program. Delete the Position Management class that you added in step 2 above.



Review of Questions Answered

1. What are training programs and how are they used?

   A training program is composed of a series of up to 15 training classes that must be successfully completed by an employee or group of employees.

2. When are training programs used?

   Training programs are used when a series of classes logically fit together in some way and it has been decided that all component classes of the overall program are required by certain employees or groups of employees. An employee would have to complete each component to actually complete the training program itself.

Requesting Training for an Employee

Apply the Concept

1. Consider the way employee training is managed in your organization and determine whether it would be useful for you to use the Objective To Course Match form (56RSCR) (also known as the Training Request Facility).

   Your answer will be specific to your organization.

2. Assume one of the courses your organization offers to employees is 'Using Word for Windows'. What training objectives would you set up for this course?

   Your answer will be specific to your organization.

3. What prerequisites would you set for a training course in your organization called 'Advanced Word for Windows'? How do you plan to record and check these prerequisites using the full functionality of the system?

   Your answer will be specific to your organization.

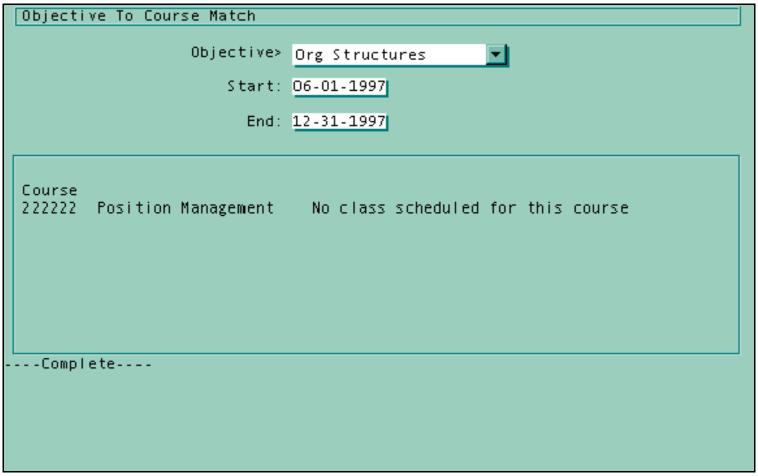
4. Consider how you intend to use the Objective To Course Match form (56RSCR) (also known as the Training Request Facility) in your organization. Who will check training requests? Which facility would be most useful for checking training requests?

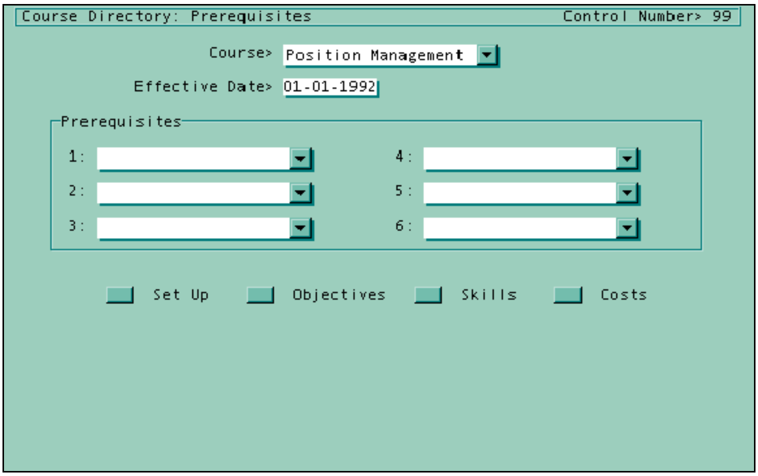
   Your answer will be specific to your organization.

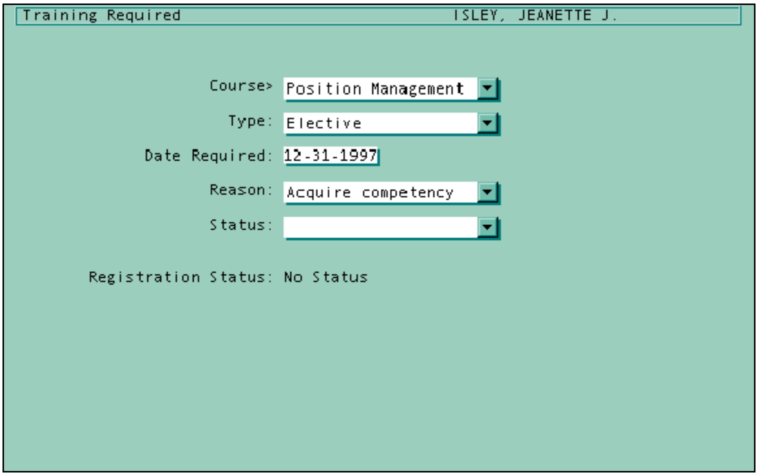
Extended Practice

1. Identify the best course for Jeanette Isley in organization 999999 based on the details below. Once you have identified the suitable training course, check that she has satisfied any prerequisites and then enter the training request.

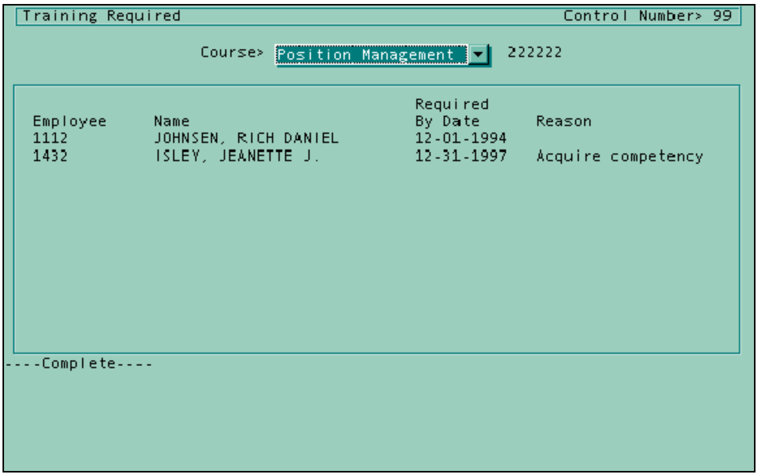
   Facts: Jeanette Isley, Employee 1432, has expressed a desire to learn more about organization structure and managing positions. She already has earned an MBA and has talked to her manager about pursuing an opportunity soon to be available in the HR area that requires knowledge of organizational planning, position tracking, and succession planning. Her manager asked you to review this request and determine what course might be appropriate for Jeanette and also determine whether a class is scheduled before December 31, 1997. Enter the training request for this elective course.


Objective To Course Match
Objective> Org Structures
Start: 06-01-1997
End: 12-31-1997
Course
222222 Position Management No class scheduled for this course
----Complete----


Course Directory: Prerequisites
Control Number> 99
Course> Position Management
Effective Date> 01-01-1992
Prerequisites
1:
2:
3:
4:
5:
6:
Set Up
Objectives
Skills
Costs



2. Verify that the training request for Jeanette appears on the Training Required inquiry form (33RSCR).



Review of Questions Answered

1. When should the Training Request Facility be used?

   This optional feature is used in organizations that do not want the people (such as line managers) who are authorized to request training for employees to actually complete/administer the registration process. Instead, a training administrator would review the requests and register the employee for the appropriate class(es). If training requests are not entered first, it means that registering an employee for a training class becomes the initial entry task.

2. How are training objectives used to identify suitable training courses?

   To enable staff to find the best course available for an employee, training objectives are matched with course objectives. The list of training objectives that have been identified for the available courses are displayed in the Objective text box on the Objective To Course Match form (56RSCR). Selecting a training objective from this option list allows the system to search for the appropriate training course that satisfies the training objective established for the employee. This is the only way to search for the suitable training course(s) without knowing the name of the training course you wish the employee to attend. IMPORTANT: You cannot use the Objective To Course Match form (56RSCR) (also known as the Training Request Facility) if you do not use training objectives to define suitable training courses. And, if you do use training objectives, it is important to clearly define them to avoid confusion and make the entire process more effective.

3. What are course prerequisites and how are they used?

   A prerequisite may be attendance at a particular course, proven mastery of certain skills and abilities, or anything else that is measurable, such as length of experience. If your organization uses the course prerequisite feature, it will be necessary to manually check to see that an employee satisfied the prerequisites once a training request or training registration is received. The organization will have to determine how best and when to check prerequisites.

4. What methods of checking training requests are available?

   Four facilities can check training requests that have been entered onto Training Administration:

Method	**Type of facility**	**Name of facility**
By training course	Online list of employees	Training Required inquiry form (33RSCR)
By training course	Hard-copy report of employees	Training Courses Needed by Course report (47RRPT)
By class	Online list of employees	Class Registration/ Cancellation form (20RSCR)
By employee	Hard-copy report of courses	Training Courses Needed by Employee report (48RRPT)

Registering an Employee for Training

Apply the Concept

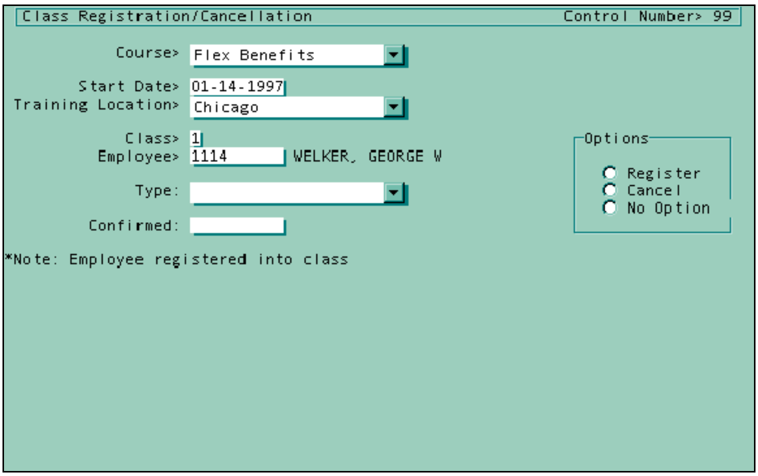
1. Consider which options for checking class registrations will be used in your organization. Who will be responsible for this task?

   Your answer will be specific to your organization.

Extended Practice

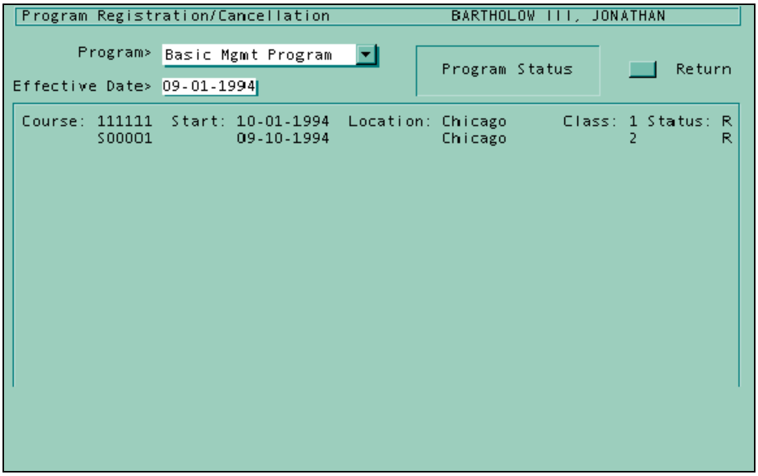
1. Register these employees for the Flex Benefits class in Chicago on January 14, 1997:
   - 1114
   - 1234
   - 2012
   - 3011

   The form will look the same for the other three employees.

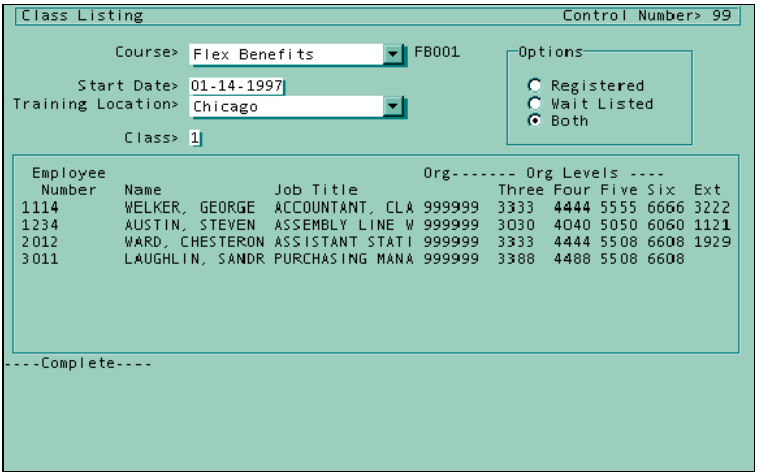


2. Register these employees for the Basic Mgmt Program in Chicago that became effective September 1, 1994 (and which you established in the Extended Practice in Chapter 6):
   - 1113
   - 1115
   - 1116

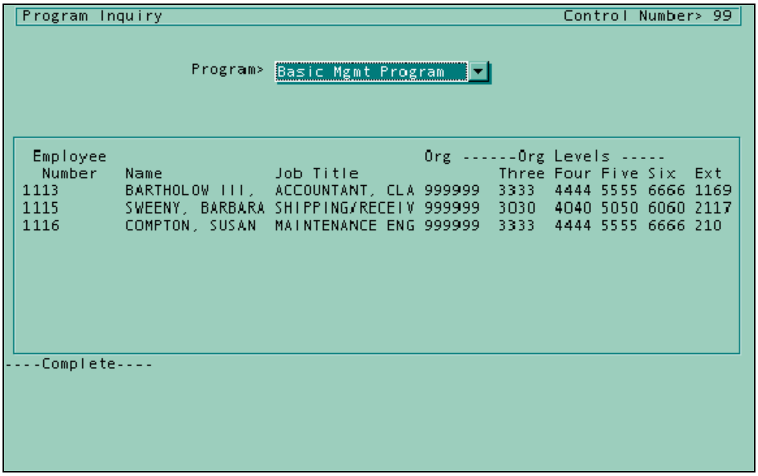
   The form will look the same for the other two employees.



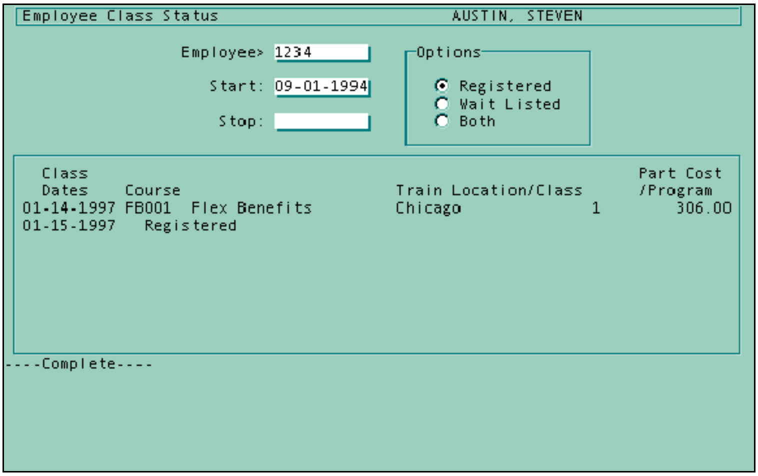
3. Display a listing of all employees currently registered and/or wait-listed for the Flex Benefits class scheduled for January 14, 1997, in Chicago.

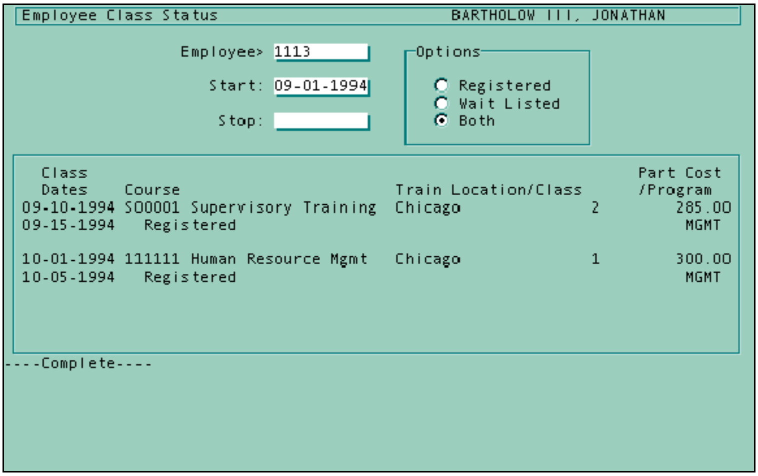


4. Display a listing of all employees currently registered for the Basic Mgmt Program described in question 2 above.



5. Use the Employee Class Status inquiry form (57RSCR) to display all classes for which Employees 1234 and 1113 are registered and/or wait-listed as of September 1, 1994. What happens if you leave the date text boxes blank?





Employee Class Status BARTHOLOW III, JONATHAN

Employee> 1113

Start: 09-01-1994

Stop:

Options
- Registered
- Wait Listed
- Both

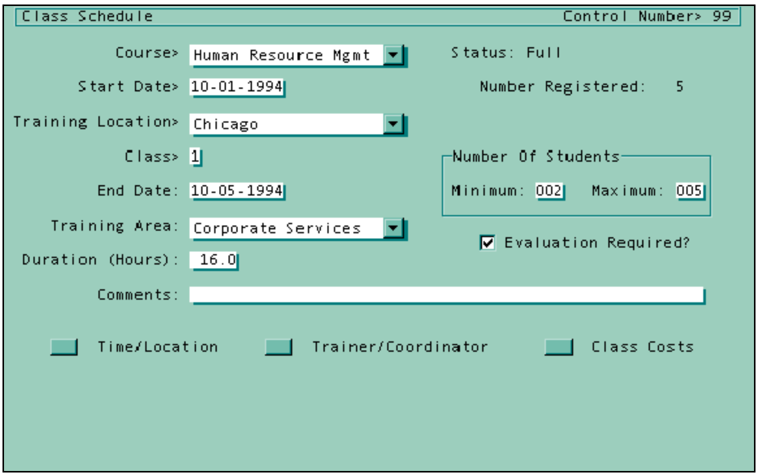
Class Dates	Course	Train Location/Class		Part Cost /Program
09-10-1994	S00001 Supervisory Training	Chicago	2	285.00
09-15-1994	Registered			MGMT
10-01-1994	111111 Human Resource Mgmt	Chicago	1	300.00
10-05-1994	Registered			MGMT

----Complete----

If the start date text box is left blank, the current date is used. All classes on dates equal to or later than that date are displayed. If the stop date is left blank, all future-dated classes are displayed.

6. Look at the Class Schedule form (13RSCR) for these classes and determine whether the class is full or if space is available, and also note how many students are currently registered:

   - Class 111111 in Chicago on October 1, 1994



Class Schedule Control Number> 99

Course> Human Resource Mgmt

Status: Full

Start Date> 10-01-1994

Number Registered: 5

Training Location> Chicago

Class> 1

Number Of Students

Minimum: 002 Maximum: 005

End Date: 10-05-1994

Training Area: Corporate Services

Evaluation Required?

Duration (Hours): 16.0

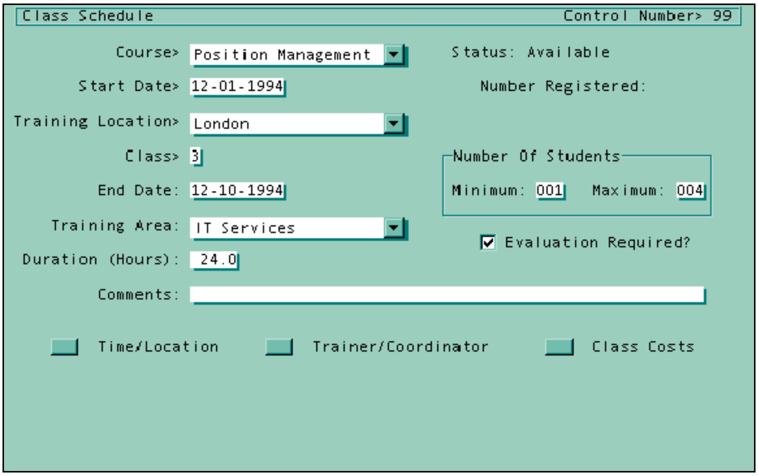
Comments:

Time/Location

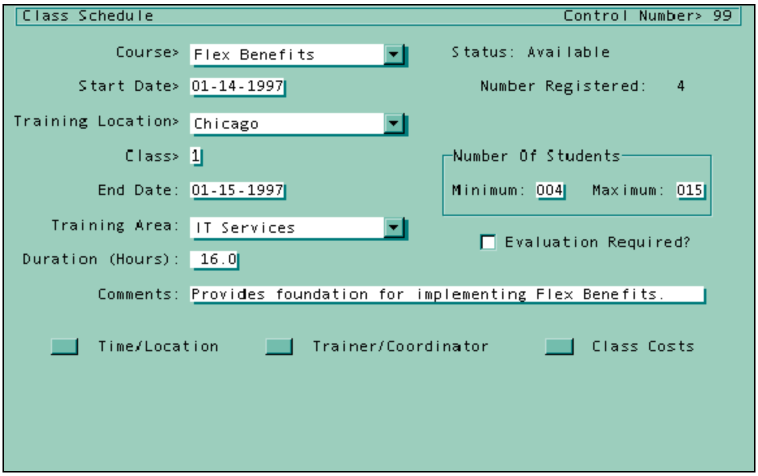
Trainer/Coordinator

Class Costs

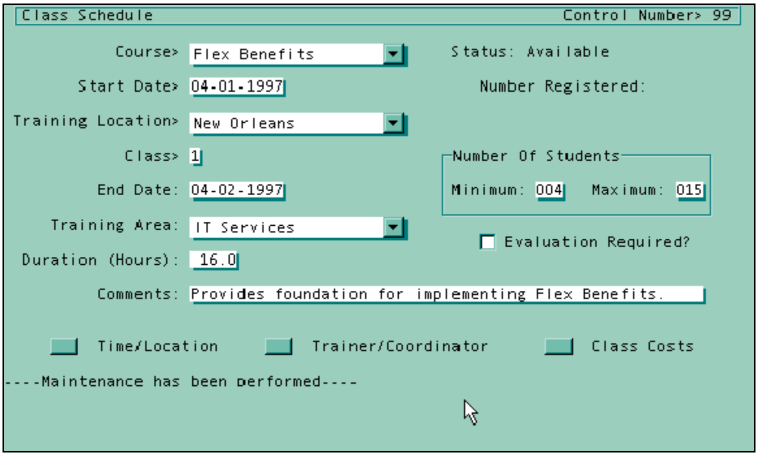
- Class 222222 in London on December 1, 1994



- Class FB001 in Chicago on January 14, 1997



- Class FB001 in New Orleans on April 1, 1997



Review of Questions Answered

1. How are course availability and class availability checked?

   There are a number of options for identifying availability for training courses or classes and for determining those employees who are registered and/or wait-listed. These options include the following:

   a) Training Schedule form (53RSCR)

   This form is used to display the upcoming schedule of training classes including Course, Class Dates, Training Location/Class Status (Available, Full, Canceled), and Class Costs.

   b) Class Schedule form (13RSCR)

   This form automatically updates the display of Status (Available, Full, Canceled) and Number Registered each time a student is registered in or canceled from a class. It also displays the minimum and maximum number of students established for a class.

   c) Class Listing form (50RSCR)

   This form is used to display a listing of employees registered or wait-listed for a scheduled training class.

   d) Program Inquiry form (52RSCR)

   This form is used to display a listing of employees registered or wait-listed for a training program.

   Paper reports are also available depending on the specific type of information you are seeking.

2. How are training programs administered?

Organizations may set up training programs that consist of up to 15 different component classes, all of which must be taken by an employee(s) to successfully complete the program. Facilities are available in the system that provide management tools to assist in effective administration of this task. It is even possible to future date new training programs and begin enrolling students prior to the start date.

3. What is the waiting list process?

   When registering an employee for a class that has a status of Full, there is a system option available to put that employee on a waiting list. Or, the employee could be registered for another class if one is available. Display forms such as the Class Listing form (50RSCR) and the Program Inquiry form (52RSCR) allow you to display the wait-listed employees in addition to, or instead of, those who already have been registered.

4. How are employee registrations confirmed?

   Confirming class registrations by producing a letter for the registered employee(s) is possible using the Class Confirmation report (23RRPT) and following the instructions included in this chapter. This confirmation letter details the training class attributes such as class location, time, and date(s). Another report, the Class Reminder report (25RRPT), is also available.

Canceling Registrations

Apply the Concept

1. Canceling employee registrations is an optional system feature. Describe the advantages your organization would derive from using this functionality.

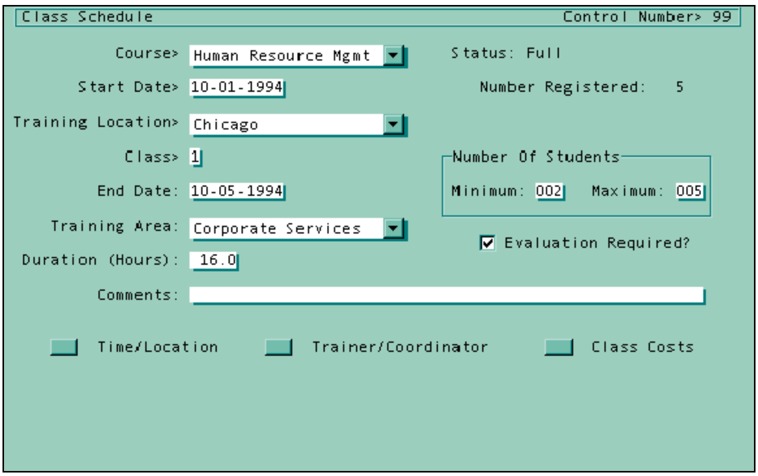
   Your answer will be specific to your organization.

2. Describe the primary difference between canceling an employee's registration from three separate classes that are not part of a program, and canceling an employee's registration in a program that is composed of the same three classes.

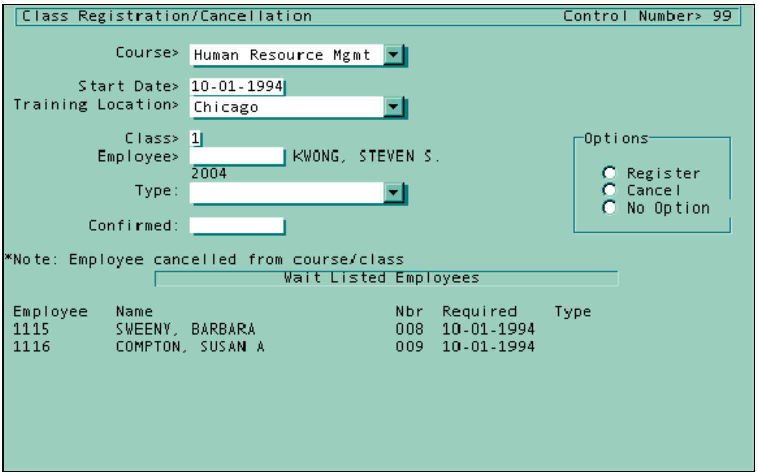
   When canceling three class registrations for the same employee using the Class Registration/Cancellation form (20RSCR), three separate cancellation entries need to be processed. If that same employee is registered instead for a program that is composed of the same three classes, canceling the program using the Program Registration/Cancellation form (16RSCR) automatically cancels the employee from all classes within that particular program.

Extended Practice

1. Access the Class Schedule form (13RSCR) and make note of the Status and Number Registered values for the Human Resource Management class in Chicago on October 1, 1994.

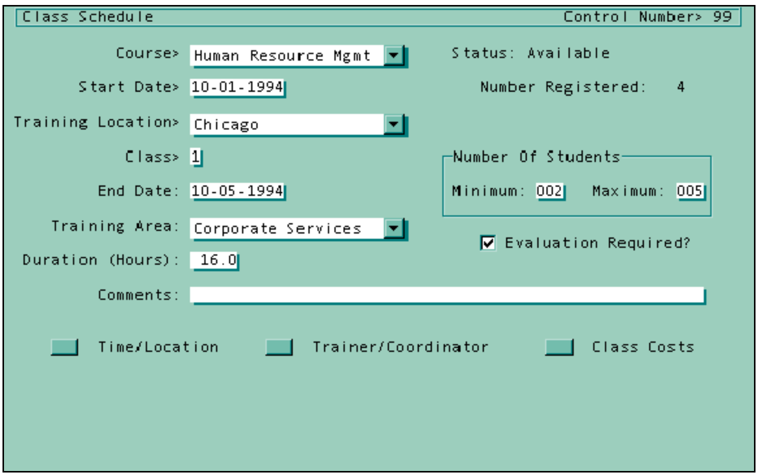


2. Cancel employee 2004 from this Human Resource Management class. What is the display at the bottom of the form (following the cancellation) telling you?



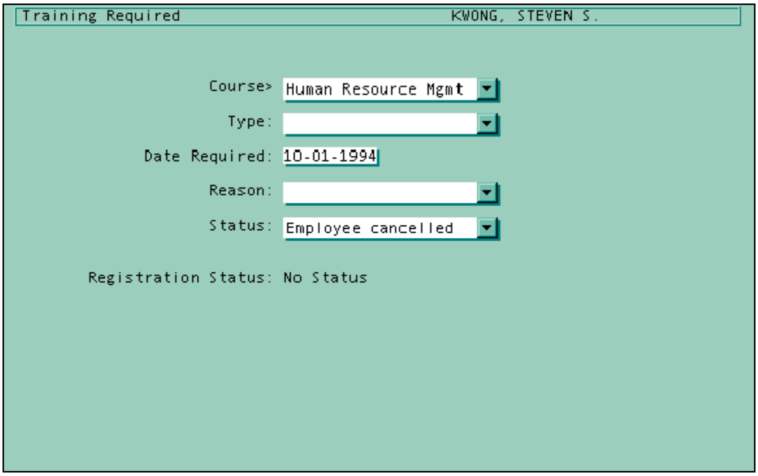
The message indicates a confirmation of the class cancellation and displays the wait-listed employees.

3. Return to the Class Schedule form (13RSCR) for this class and note how the Status and Number Registered values have changed.



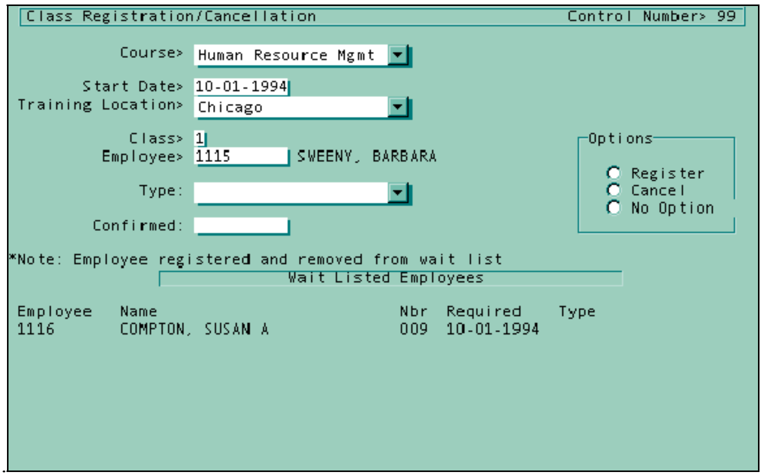
The number registered is reduced to 4 and the class status is 'Available'.

4. Access the Training Required form (31RSCR) for employee 2004, and identify the processing that has occurred as a result of the cancellation.



This form is created or updated by the Class Registration/Cancellation form (20RSCR) when a registration is canceled.

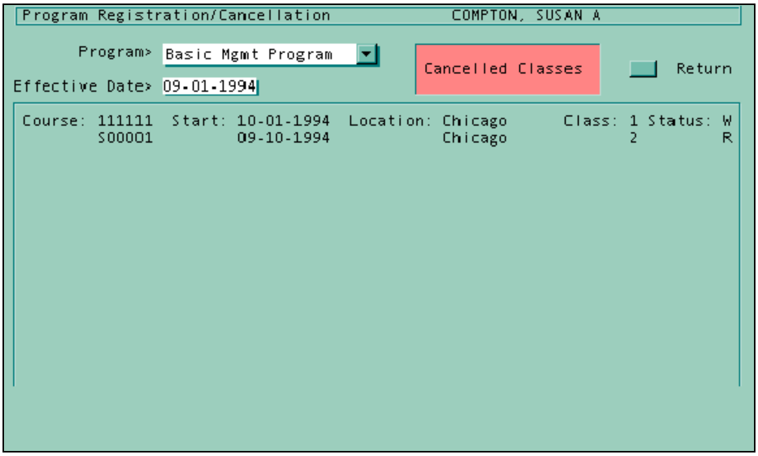
5. Now that there is an opening in the class, register the first wait-listed employee 1113.



6. Open the Class Registration/Cancellation form (20RSCR) and click on the Selections button on the toolbar to list the classes that employee 1116 is registered for as a result of registering her in the Basic Mgmt Program in Chicago that became effective September 1, 1994. (She was registered in this program as part of the Extended Practice in Chapter 8.)

Course		Start Date	Training Location	Cls	Registration Number	Employee
111111	Human Resource Mgmt	01-01-1997	01	1	002	2010
111111	Human Resource Mgmt	10-01-1994	01	1	001	2001
111111	Human Resource Mgmt	10-01-1994	01	1	002	2002
111111	Human Resource Mgmt	10-01-1994	01	1	003	2003
111111	Human Resource Mgmt	10-01-1994	01	1	007	1113
111111	Human Resource Mgmt	10-01-1994	01	1	008	1115
111111	Human Resource Mgmt	10-01-1994	01	1	009	1116
FB001	Flex Benefits	01-14-1997	01	1	001	1114
FB001	Flex Benefits	01-14-1997	01	1	002	1234
FB001	Flex Benefits	01-14-1997	01	1	003	2012
FB001	Flex Benefits	01-14-1997	01	1	004	3011
S00001	Supervisory Training	09-10-1994	01	2	002	1113
S00001	Supervisory Training	09-10-1994	01	2	003	1115
S00001	Supervisory Training	09-10-1994	01	2	004	1116

7. Cancel employee 1116 from the Basic Mgmt Program.



Review of Questions Answered

1. How are employee class cancellations processed?

   Employee class cancellations are processed using the Class Registration/ Cancellation form (20RSCR) the same form used to register the employee for the class. When this is done, both the table-level and the employee-level class registration records are deleted. The Class Schedule form (13RSCR) text boxes of Status and Number Registered are automatically updated, and a Training Required form (31RSCR) is created with a Status value of Employee Canceled. If that form already exists for the employee, the Status value is updated in the same manner.

2. How are employee program cancellations processed?

   Once an employee's registration for a particular program is canceled, the employee is automatically canceled from all classes within that training program. The Program Registration/Cancellation form (16RSCR) is used to actually process the cancellation.

After Enter is pressed, a form panel is returned that displays a full listing (in Display mode) of all the employee's canceled classes within the program. The Class Schedule form (13RSCR) is automatically updated to reflect the revised Status (Available, Full, or Canceled) and/or Number Registered (actual number of employees registered after the cancellations were processed). This functionality ensures the integrity of training program data (and classes within that program) as well as individual employee training records.

Processing Training Results and Evaluations

Apply the Concept

1. Define training class results and identify the form used to record them.

   Training class results are the class details (such as class attendance and class results), absence information, and objectives met check boxes that are recorded on the second panel of the Process Class Results form (22RSCR).

2. Define class evaluation results and identify the form used to record them.

   Class evaluation results are the results entered on evaluation forms filled out by class participants upon completion of a class and recorded on the Process Class Evaluation Results form (23RSCR). Up to 10 evaluation categories can have rating values recorded.

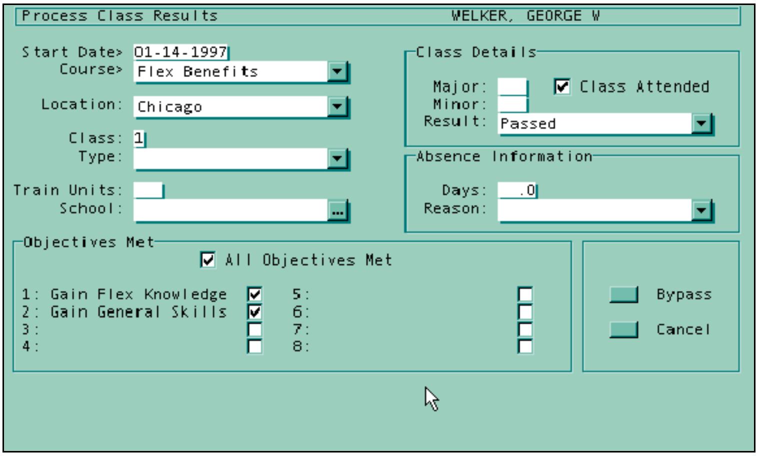
3. Processing training results and evaluations is an optional feature of Training Administration. Consider how your organization currently records similar data (if at all) and describe how using this feature can improve training-related record keeping.

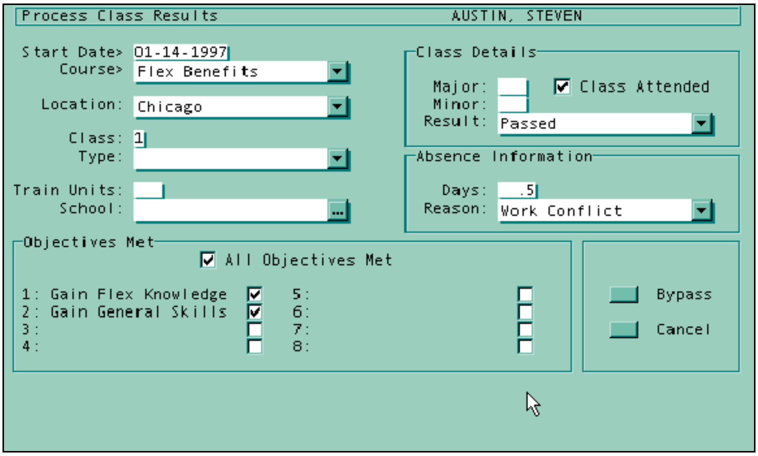
   Your answer will be specific to your organization.

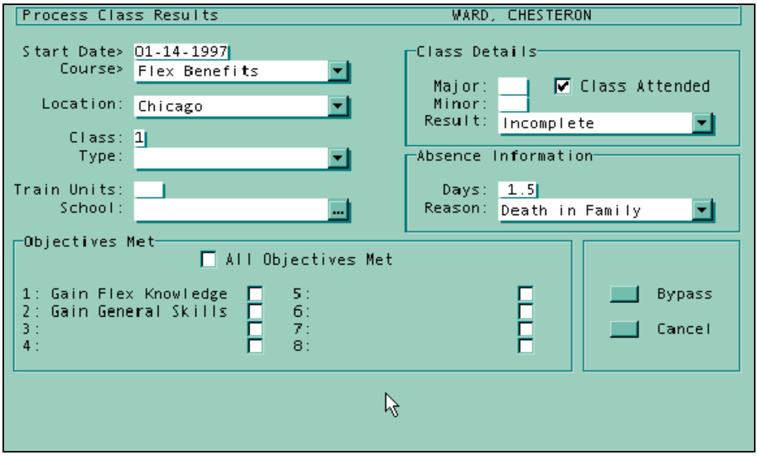
Extended Practice

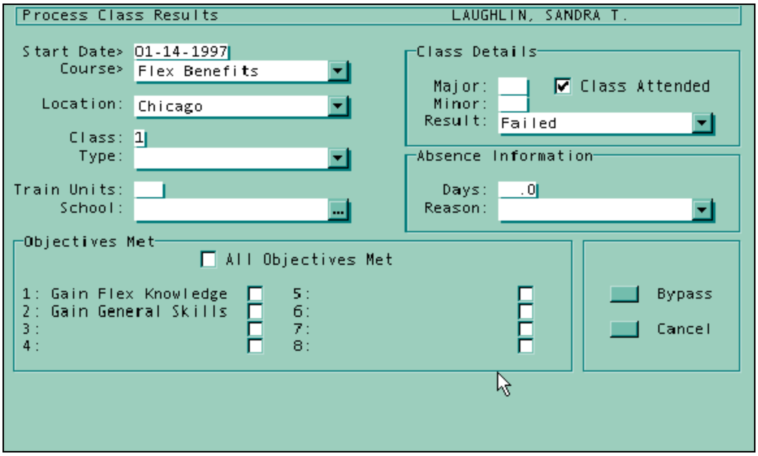
1. Access the Process Class Results form (22RSCR) for the Flex Benefits class in Chicago on January 14, 1997. Record results for all employees who attended the class:

Employee Number	**Training Class Results**
1114	Employee passed the class, missed no days, and met all objectives.
1234	Employee passed this elective class but missed a half day because of a work conflict. All objectives were met.
2012	Employee missed one and a half days of the class because of a death in family. This class should be recorded as Incomplete.
3001	Class results are missing. Bypass this employee.
3011	Employee failed the class even though no class time was missed.

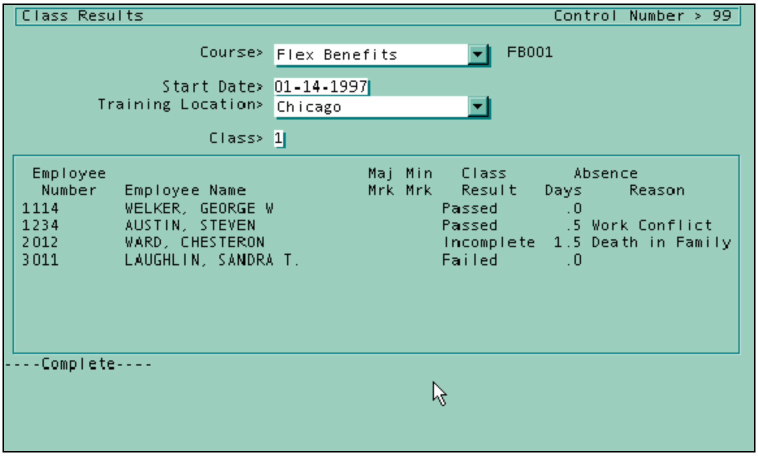

Process Class Results
WELKER, GEORGE W
Start Date>
01-14-1997
Course>
Flex Benefits
Location:
Chicago
Class:
1
Type:
Train Units:
School:
Class Details
Major:
Minor:
Result:
Class Attended
Passed
Absence Information
Days:
.0
Reason:
Objectives Met
All Objectives Met
1: Gain Flex Knowledge
2: Gain General Skills
3:
4:
5:
6:
7:
8:
Bypass
Cancel


Process Class Results
AUSTIN, STEVEN
Start Date>
01-14-1997
Course>
Flex Benefits
Location:
Chicago
Class:
1
Type:
Train Units:
School:
Class Details
Major:
Minor:
Result:
Class Attended
Passed
Absence Information
Days:
.5
Reason:
Work Conflict
Objectives Met
All Objectives Met
1: Gain Flex Knowledge
2: Gain General Skills
3:
4:
5:
6:
7:
8:
Bypass
Cancel





2. View the training results just recorded online by class by accessing the appropriate form.


Class Results Control Number > 99

Course> Flex Benefits FB001

Start Date> 01-14-1997

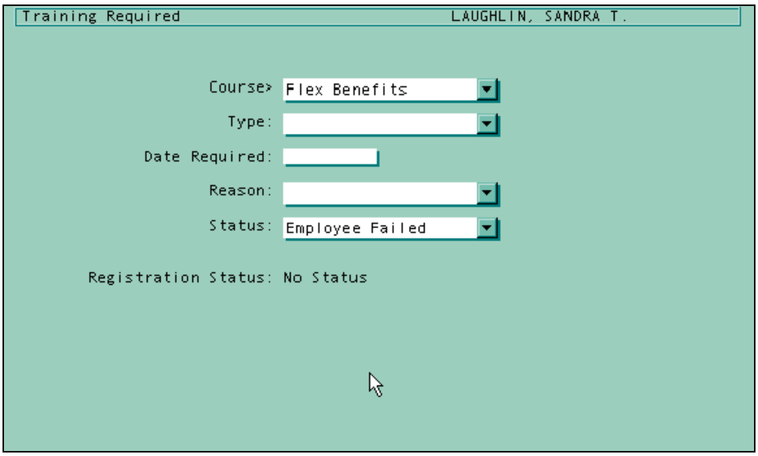
Training Location> Chicago

Class> 1

Employee Number	Employee Name	Maj Mrk	Min Mrk	Class Result	Absence Days	Reason
1114	WELKER, GEORGE W			Passed	.0	
1234	AUSTIN, STEVEN			Passed	.5	Work Conflict
2012	WARD, CHESTERON			Incomplete	1.5	Death in Family
3011	LAUGHLIN, SANDRA T.			Failed	.0	

----Complete----

3. View the Training Required form (31RSCR) for employee 3011. Explain the processing that has occurred.


Training Required LAUGHLIN, SANDRA T.

Course> Flex Benefits

Type:

Date Required:

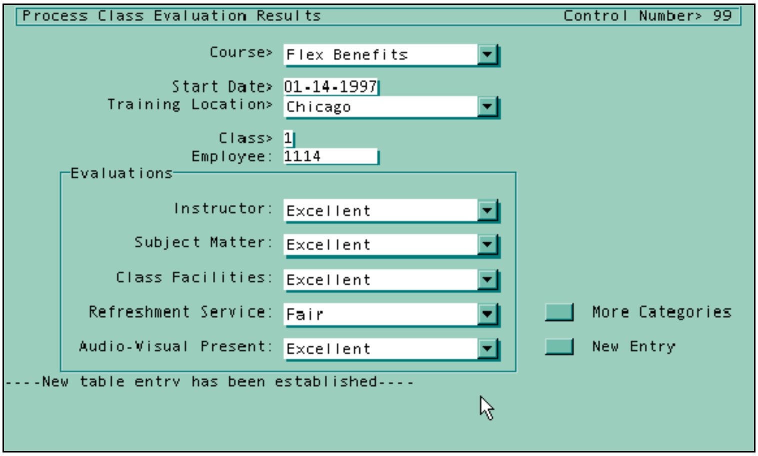
Reason:

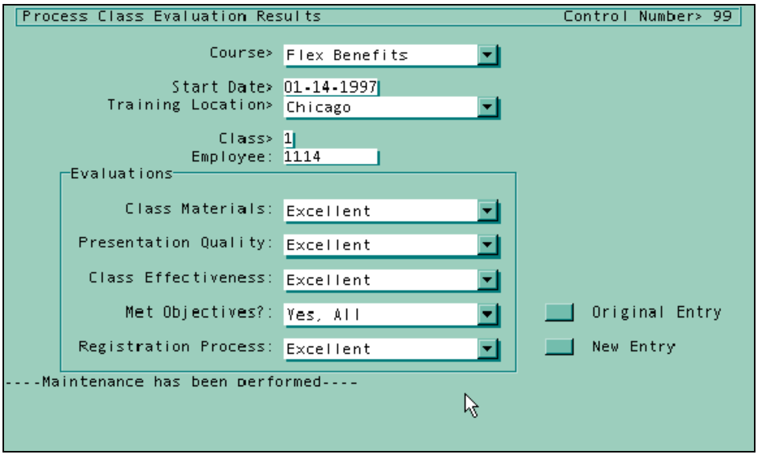
Status: Employee Failed

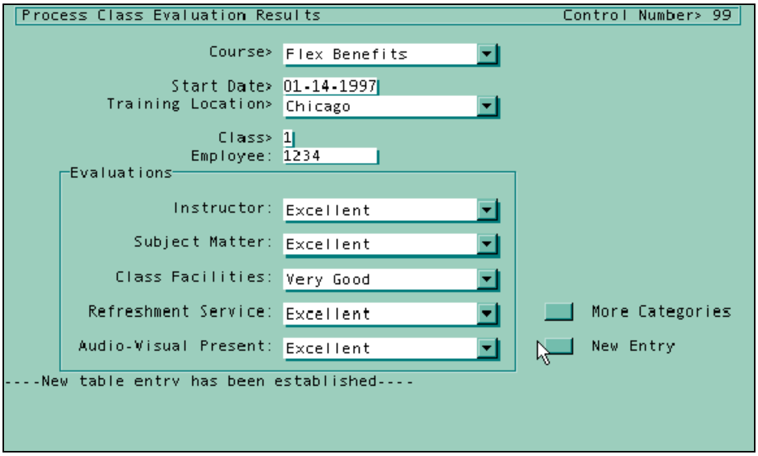
Registration Status: No Status

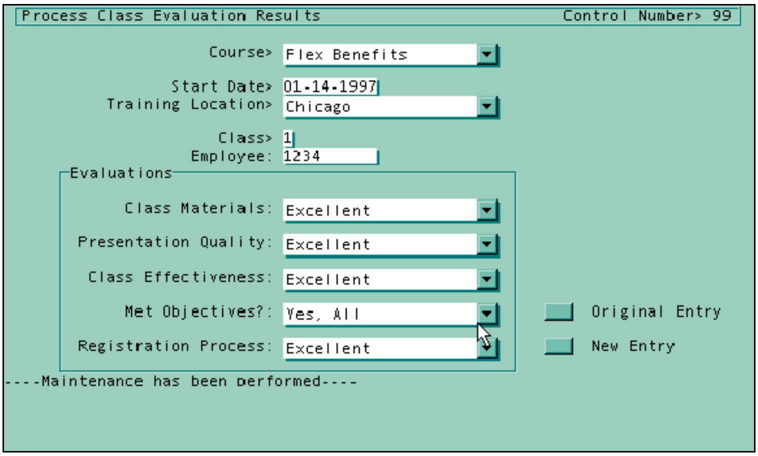
This form is either created or updated by the Training Results/History form (30RSCR) when an employee has failed a class.

4. Process the class evaluation results by employee for the two employees who successfully completed the class and met all objectives: 1114 and 1234. Both employees gave Excellent ratings to most categories, but Employee 1114 rated the Refreshment Service as Fair and Employee 1234 rated the Class Facilities as Very Good. Both felt all objectives had been met.


Process Class Evaluation Results
Control Number> 99
Course> Flex Benefits
Start Date> 01-14-1997
Training Location> Chicago
Class> 1
Employee: 1114
Evaluations
Instructor: Excellent
Subject Matter: Excellent
Class Facilities: Excellent
Refreshment Service: Fair
Audio-Visual Present: Excellent
More Categories
New Entry
----New table entry has been established----


Process Class Evaluation Results
Control Number> 99
Course> Flex Benefits
Start Date> 01-14-1997
Training Location> Chicago
Class> 1
Employee: 1114
Evaluations
Class Materials: Excellent
Presentation Quality: Excellent
Class Effectiveness: Excellent
Met Objectives?: Yes, All
Registration Process: Excellent
Original Entry
New Entry
----Maintenance has been performed----





Review of Questions Answered

1. How are training class results processed?

   After training results are entered using the Process Class Results form(22RSCR), the actual processing depends on the following:

   If the class was attended and passed: (1) The employee's Training Required form (31RSCR) for the class is deleted; (2) the employee's Training Results/History form (30RSCR) is updated; (3) the employee's Skills And Competencies form (33-SCR) is updated with the skills attained as recorded on the Skills panel of the Course Directory form (10RSCR) ; and (4) class results are updated on the Class Results form (51RSCR).

   If the class was attended and failed: (1) The Training Required form (31RSCR) is marked with a Failed indicator and retained since the employee still needs to take the class; (2) the employee's Training Results/History form (30RSCR) is updated; and (3) *class results (showing Failed) are updated as viewed on the Class Results form (51RSCR).*

If the employee did not attend or was wait-listed but did not get into the class: (1) A Training Required form (31RSCR) is created for the employee if it did not previously exist; and (2) the employee level registration record is deleted.

2. What options are available when processing training class results?

   Class results can be entered for a selected registered and/or wait-listed employee by entering the employee number on the first panel of the Process Class Results form (22RSCR).

   By leaving the employee number blank, an automatic process to record class results for all employees registered for the class can be started. Use the Next button on the second panel of the of the Process Class Results form (22RSCR) to automatically scroll through each registered and wait-listed employee to record class results.

   If an employee has passed a class for which objectives have been established, you can select and check off the objectives that have been met or indicate that all objectives have been met.

   The Cancel option button is available to back out of the recording class results process and return to the first form panel.

3. What are the methods of viewing training class results?

   A number of options are available as listed below:

By class	*Online list*	*51RSCR*
By class	*Hard copy*	*33RRPT*
By employee	*Online list*	*30RSCR*
By employee	*Hard copy*	*21RRPT*
By training location	*Hard copy*	*45RRPT*

4. How are training class evaluations processed?

   Evaluation forms for class participants to fill out can be produced by the Class Evaluation report (24RRPT) if the Evaluation Required text box on the Class Schedule form (13RSCR) was checked. The Process Class Evaluation Results form (23RSCR) is then used to enter/record these results as filled out by class participants.

5. What options are available when processing class evaluation results?

   Class evaluations can be recorded without tying each evaluation to a specific employee, or by tying each evaluation to the employee who performed the evaluation.

   Up to 10 evaluation categories are available; these are unique to the organization, not to the class itself.

Completing and Analyzing Training Costs

Apply the Concept

1. How would using the optional Analyzing Training Costs feature be helpful to your organization?

   Your answer will be specific to your organization. However, it should include mention of how this feature facilitates viewing and analyzing the costs incurred with developing and delivering training classes. These, in turn, can be used to track related costs and make decisions based on how much is being spent to develop and conduct the various types of classes. In other words, this is another feature of the system that helps management make informed decisions about the future direction of the training function within an organization.

2. Describe the tools available in Training Administration to help organizations view and analyze costs.

   The Training Class Costs Summary form (35RSCR) displays a detailed breakdown of all costs associated with a training class (course, class, and employee costs). It also provides summary totals for all class types and total costs for all three costing options.

   The Training Expenditure Charge-Back report (27RRPT) lists class training costs that an organization may wish to charge back to employees.

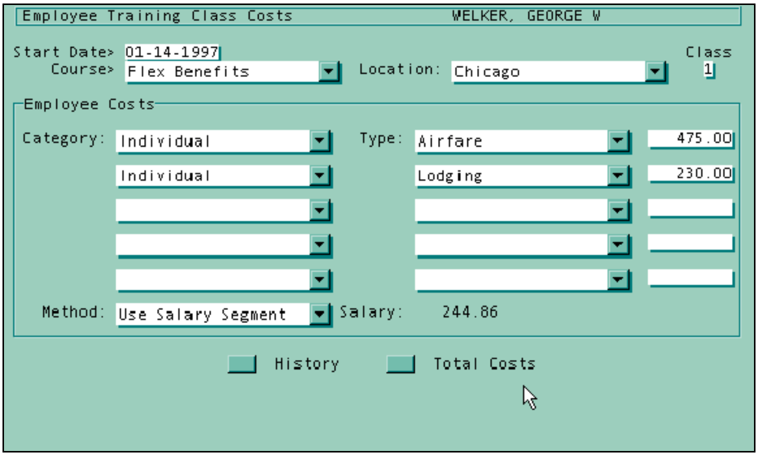
   The Training Expenditure Disbursement report (28RRPT) summarizes, by provider, class cost—defined as the total of all costs with a cost category of Equipment, Operating, Miscellaneous, or Per Head multiplied by the number of class participants.

   In addition, the Employee Training Class Costs form (34RSCR) provides an inquiry view of all employee-level costs by selecting the Total Costs button at the bottom of the form. Costs included on this panel have category Options of Individual, Participant, and Per Head.

Extended Practice

1. George Welker's manager wants to track all costs associated with George's participation in the Flex Benefits class he is taking on January 14, 1997, including salary expense for the two days of training. Access the appropriate form to record these individual employee-level costs:

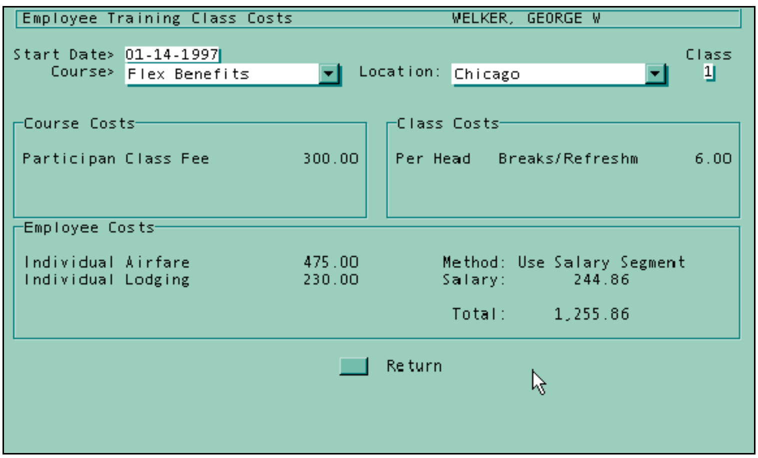
   Airfare: 475.00
   Lodging: 2 nights at 115.00 each
   Salary: Allow George's salary segment to determine the amount of salary expense to be included in these costs.



2. Explain how the salary figure that appears was calculated. How can you verify that it is correct?

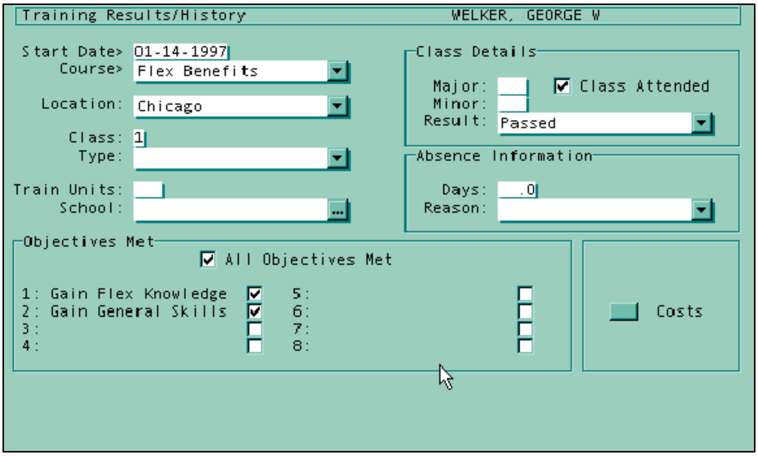
   Class hours are shown as 16 on the Class Schedule form (13RSCR). The method used to calculate this employee's prorated salary for the length of the class is taken from his salary segment on the Salary Assignment/Changes form (40-SCR). His hourly rate is listed as 15.3040. This rate times 16 hours equals 244.86, which is what displays in the Salary.

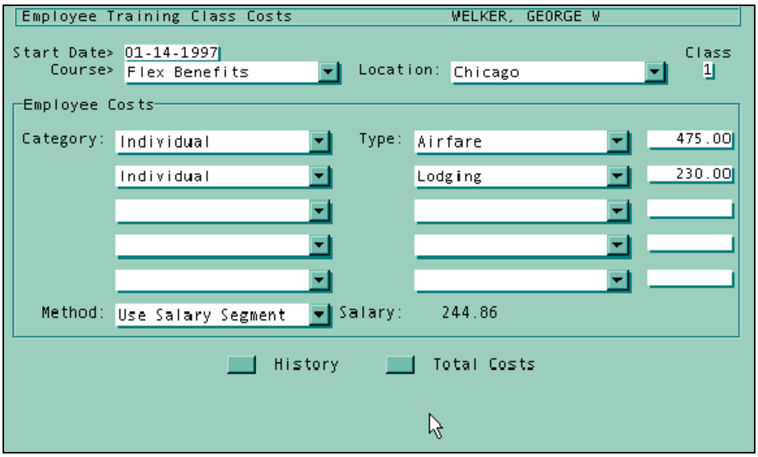
3. Click the Total Costs command button. What types of cost categories are included in the 'Total' that is displayed?



Only the cost categories of Individual, Per Head, and Participant will display on this employee-level class cost form (34RSCR). For this employee, only the categories of Participant and Individual are included in the total.

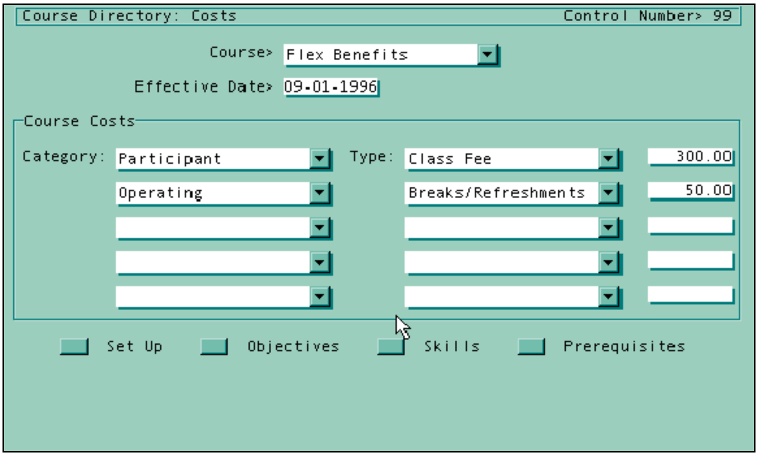
4. Return to the first panel and click on the History command button. Review the information that displays. Click on the Costs command button on this form. Where does it take you?





The History command button takes you to the Training Results/History form (30RSCR) for this class for this employee; clicking on Costs command button returns you to the Employee Training Class Costs form (34RSCR).

5. Check the Costs panel of the Course Directory form (10RSCR) for Flex Benefits. Are any of the costs listed there not reflected on the Employee Training Class Costs form (34RSCR)? If yes, can you explain why this is so?



Only the Operating costs associated with Breaks and Refreshments are not included at the employee level. Only the cost categories of Individual, Per Head, and Participant that can be associated with a specific employee will appear on the Employee Training Class Costs form (34RSCR).

Review of Questions Answered

1. What are the cost categories?

   As delivered, the system uses six cost categories: Equipment, Individual, Operating, Miscellaneous, Per Head, and Participant, as defined in the Cost Category option list (TR14). The categories of Individual, Per Head, and Participant indicate employee-level costs, while the others indicate either course- or class-level costs.

2. What are the different types of costs?

   For each cost category, a cost type must be entered as defined in the Cost Category option list (TR14). Examples include instructor fee, class fee, room and equipment rentals, lunch and refreshments, airfare, and lodging.

3. What are the options when recording costs?

   Costs may be set up at the course level using the optional Course Costs panel of the Course Directory form (10RSCR). Examples include cost of books and course fees, which might be standard for all classes within a course and therefore are set up at the course level.

   Costs may also be established at the class level using the optional Class Costs panel of the Class Schedule form (13RSCR). For example, different instructors may charge different fees for teaching the same course, so these costs differ at the class level.

   Last, costs associated with a specific employee can be set up using the Employee Training Class Costs form (34RSCR). Examples of employee-level costs are airfare, *lodging, and prorated salary expense based on the number of instructional hours for the class.*

Glossary of Terms

.EXE
A binary file containing a program in machine language that is ready to be executed.

.INI
A file that contains the parameters (values) used by the .exe file (program).

360-degree appraisal
Appraisals that include evaluations from an employee's managers and supervisors, peers, subordinates, and even customers, clients, and suppliers.

Absence data
Employee-level absence information that is entered on the absences forms.

Absence point
User-defined number that may be assigned for a particular absence and that can be totaled over time to determine if an employee is within the accepted number of absences for a time period.

Absence type
A classification of an employee absence, such as 'jury duty' or 'sick'. Employee absences are recorded by date and absence type.

Account timeout
The period of time that elapses before a user's account becomes invalid because of inactivity.

Accumulator id
A three-position, alphanumeric identifier for a benefits accumulator.

Acrobat
A suite of programs developed by Adobe Systems, Inc. For creating and distributing electronic documents. Programs in the suite allow you to create a portable document format (PDF) file for a document. You can then distribute the PDF file electronically to people who view the document with their freely distributed acrobat reader. People viewing a PDF file (or document) with the Acrobat Reader see the document with the exact layout intended by the author.

Action button
An action button performs an action such as saving the information you entered or telling the system you finished reviewing a page. An action button consists of an icon (or button) accompanied by underlined text (link text). For example, at various places throughout eCyborg Interactive Workforce you may see an action button displaying a check mark accompanied by the underlined text 'save changes'. You can click either the text or the button to save your changes to the page.

Activity code
Describes the clock transaction (ring) activity, such as clock start or meal end.

Activity types
With the time and attendance solution, you can set up the system so that an employee or group of employees may clock in and out for up to eight different activities: clock-in (1), break 1 start (2), break 1 end (3), meal start (4), meal end (5), break 2 start (6), break 2 end (7), and clock end (8).

Actuarial valuation
An examination of a pension plan to determine if contributions are being accumulated at a rate sufficient to pay the promised pensions.

Administration home page
The administration page that displays when a user logs on using his or her administrator user ID and password. The administration page displays links to individual administrator pages (eCyborg Interactive Workforce, Human Resources Administration, Benefits Administration, and Payroll Administration).

Administrative User ID
User ID created by an administrator with the role of eCyborg Interactive Workforce administrator. This ID

differs from the employee user ID generated for the administrator.

Aggregate tax method
Method of calculating taxes in which year-to-date income is used to project annual wages (using prorating), on which taxes are calculated. With this method, the amount of tax withheld can vary from pay period to pay period. This method is useful in preventing a salesperson from being over withheld as the result of fluctuations in commission over various pay periods. It is activated on the payroll solution by selecting aggregate/cumula tax (9) from the Withholding Method (PR09) option list on the Employee Tax Record Maintenance form. It is also referred to as cumulative tax calculation method.

Annualization
Process of calculating the annual amount of pay based on the number of pay periods and pay period amounts. Calculated by multiplying the number of pay periods in the year by the current taxable wages in the pay period.

Annualization factor
The factor that is used to multiply current pay period wages to determine annual wages. For example, a monthly pay frequency has an annualization factor of 12. The Payroll Solution typically calculates income taxes on the basis of annual wages. The annualization factor is entered by selecting an option from the Annualization (PP33) option list on the Company Pay Frequencies form for each pay frequency.

Annuitant
Someone entitled to receive or currently receiving payments from an annuity.

Annuity
A contract providing an income for a specific period of time.

Applicant
A person who is applying for a job or position in your organization. Internal applicants come from within your organization while external applicants come from outside of your organization.

Appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from 1-outstanding to 5-unsatisfactory.

ASCII
American **S**tandard **C**ode for **I**nformation **I**nterchange. The basis of character sets used in almost all present-day computers; US-ASCII uses only seven bits to convey some control codes, space, numbers, most basic punctuation, and unaccented letters a-z and A-Z.

Ask Me wizard
A natural language, full-text search facility within the online help. This allows users to type in a question, the wizard interprets the question, and displays related topics.

As-of reporting
Ability to report on data for a specified date or date range.

Audit record
A snapshot of information entered on a form. Audit records are stored on the employee database and are displayed on audit reports in an is/was reporting format. Adjustments and time entries are stored as audit records and are extracted for a payroll run in which they update the employee's record.

Audit report
A report that is available after the running of a program; it lists created records as well as error messages for records that could not be created.

Audit trail
A report of changes made to your employee database, such as the Payroll Audit Trail (0101) report.

Authorized absence
Absences that are generally considered as paid time away from regularly scheduled work.

Automatic plan
A plan that has been defined with a default option and default pre- or posttax indicator (also known as core/default plan).

Average deferral percentage
Percentage used in nondiscrimination and compliance testing mandated by US law. The calculation is defined as the contribution divided by the compensation.

Average rating
A rating used for performance appraisal systems with categories weighted by relative importance, where the average score reflects the weighted scores.

Back
Takes the user back to the previous page.

Badge
Time and Attendance Administration can be set up to use two different types of badge readers. The type of badge your organization uses, is determined by your third party badge reader software. The two types of badges are magnetic badges and bar code badges.

Badge error
Occurs when a badge is used to create a clock transaction (ring) and an employee has not been assigned to the badge.

Badge number
Up to ten-character ID stored on employee badges and clock transactions (rings) that tie clock transactions (rings) to an employee on the ***Employee Database*** (on page 350).

Banner
Banner forms separate groupings on forms produced from the Federal, State/Local, and Employee Queues.

Batch
A group of transactions submitted to the batch payroll processing system. Also, a collection of time entries that corresponds to an employee group, such as department.

Batch control record
Precedes all transactions separated by group; used to identify the company to which the transactions in that group apply. By entering anticipated totals for dollars and hours on the batch control record, you may verify your totals against those accumulated by the system.

Batch layout facility
A program that produces a segment layout for loading forms via batch. This was formerly known as BATCHL.

Batch number
An alphanumeric field on the batch control record containing a user-defined value used to identify a unique group of time entries or transactions.

Batch processing
A processing method that runs in the background and requires limited intervention.

Benchmark job
A standard or point of reference for determining total job points.

Beneficiary
A person named by the participant in an insurance or pension plan to receive any benefit provided by the plan if the participant dies.

Benefits control number
A four-position, alphanumeric identifier that specifies which tables are accessed for an organization.

Benefits statement
Report that indicates the coverage and cost of each benefits plan in which an employee participates.

Big option list
A large option list that includes a search facility. This was formerly known as a big codeset.

Bridge loan
A loan made to assist a relocated employee in purchasing a new residence before the sale of their old residence is complete.

Browser
Software application used to locate and display web pages. Modern browsers give users access to graphics, text, and multimedia information, including sound and video.

Budget plan year
A twelve-month period over which a salary budget is effective.

Budget scenario
The result of creating one or more salary plans in order to see the effect of different increase policies on the budget.

Budget setting
The process of analyzing and selecting an organization's salary budget for the coming plan year.

Cafeteria plan
A specific type of flexible benefit plan that allows employees to select their benefits from a number of benefit plans. This term may be used interchangeably with flexible benefits plan.

Calculation option list
An option list that contains calculation formula. This was formerly known as a calculation codeset.

Candidate
A person who is applying for a job or position in your organization and is under consideration.

Career planning
Providing career incentives such as advancement and additional education and training for individual employees in order to meet projected organizational needs.

Carrier record
A carrier record supplies information from one application area to another application.

Case-sensitive
A program that distinguishes between uppercase (capital) and lowercase (small) letters. A case-sensitive program that expects you to enter all commands in uppercase will not respond correctly if you enter one or more characters in lowercase.

Catalog
A file (with the extension of .cat) that contains all the information necessary for Impromptu to access and retrieve information from a relational database. The catalog provides a business view of the data, as well as information about what database to access, where the database is stored, and how the tables in the catalog are joined in the datamart.

Category code
General term used to refer to the option selected from category (PP01 and PP02) option lists on the company earnings and company deductions forms. It is used to indicate the type of earning or deduction.

CE/H
Abbreviation for considered earnings/hours.

Change control facility
A facility for updating and comparing your system control repository. This was formerly known as MAINTI/MAINTO.

Check box
A standard windows control that displays a yes/no setting, either checked (yes) or unchecked (no).

Check digit
Unique identifier that is generated by the TBLCHK program and used by the system to check the table relationship records.

Checklist
A list of tasks to be performed in sequence. The checklist displays within the navigator area. Checklists link tasks and other checklists together to perform work flow functions. Users can display a checklist by selecting a checklist icon within the tasks in the navigator.

eCyborg Interactive Workforce specific—a list of tasks/pages generally displayed in a chart with hot spots (links) for the checklist items. The user clicks the link to access the page.

Checklist item
An item appearing within the navigator when a checklist is being displayed. Checklist items include tasks, dialogs and even other checklists.

Checklist item status
Defines the status of a checklist item. These can be:

- Available to perform
- Required
- Not available
- Already completed

Checklist margin
The area of the navigator that displays the checklist item status when a checklist is being displayed.

Checkmark
If in the done column of a eCyborg Interactive Workforce checklist, indicates that an item on a checklist is complete. Can also indicate OK, finished, submit, and so forth.

Class
A class is an occurrence of a course that is specific to a location and a date, that is being administered using Training Administration. For example, 'eCyborg: Using the Web Client′ on Thursday, December 21, in Chicago is a class of the course 'eCyborg: Using the Web Client'.

Class evaluation results
These are the results as entered on the evaluation forms filled out by the class participants upon completion of the class. These results are recorded on the class evaluation results form.

Client data file
File containing information replicated from the System Control Repository. Used by client workstations to improve response time, since editing can be performed locally. May be located on each client workstation or may be located on a server and be shared by multiple client workstations on the network. Formerly known as the Client Control File.

Clock in and out
Also referred to as swipe/swiping the clock. When an employee uses their badge to record an activity time, they must pass their badge through the badge reader. This action can be referred to as clocking in and out.

Clock transaction
Record containing the information needed to create time entries for payroll processing. Clock transaction (ring) information includes date, time, and badge number. A clock transaction (ring) is created when a badge is swiped through a clock.

Clock transaction warning
Occurs when a clock transaction (ring) time falls outside of an employee's schedule warning times.

Closing costs
The costs associated with the purchase of a new house.

CLP
Abbreviation for certificates, licenses, and permits.

Codeset
A list of valid code values and associated descriptions from which you may select an appropriate entry. This is now known as an option list.

Coefficient
Customer-defined value used in the formula to calculate a new salary grade midpoint value.

Combined register (2222) report
A report that provides a detailed printout of all earnings, hours, taxes, and deductions for all the payments and adjustments made on a payroll run. It is Report Generator 2222.

Command button
A standard windows control that initiates a command of sets an option (previously known as push button).

Common tax organization
A method of setting up taxation in an organization in which all necessary tax specification records are contained in a single organization. The common tax organization often handles tax specification records more efficiently, since it avoids duplication of the federal tax records and of any state or local records used by multiple companies.

Communication event
A letter or email that can be triggered automatically or manually within the system. Communication events are set up by the system administrator and usually include data from a form or record.

Compa ratio
The ratio of a given salary compared with the midpoint of the salary range. The formula is the salary divided by the midpoint.

Competency
A requisite capacity to perform a single or set of skills or activities.

Complement limit
A 'complement limit' is the maximum number of complement units that can be assigned to a position at any one time.

Complement position
A 'complement position' is a position that is included in complement control.

Complement unit
A 'complement unit' is the type of unit used to measure the value of a position, for example, headcount, fte or hours.

Compliance
Conformity in fulfilling legal requirements.

Component
The first level of functional organization on the navigator or menu, such as employee resourcing or employee development.

Component icon
An icon that denotes the current component. There are a number of components within the system. Each component appears as an icon on the navigator.

Component plan
Any plan included under the flex master plan or grouped together under a group master.

Condition
Predefined criteria that can be added to a report's filter.

Considered earnings
An employee's paid earnings that are to be accumulated, based on plan rules, for use in determining credited service or calculations of final benefits amounts.

Considered earnings/hours (CE/H) accumulators
Used only in benefits plans to accumulate the earnings and hours an employee has acquired toward eligibility for a deferred plan. Accumulators may be retained on a monthly, quarterly, or annual basis.

Considered hours paid
Actual number of hours for which an employee was paid and that are to be accumulated based on plan rules.

Considered hours worked
Actual number of hours an employee worked. These hours are to be accumulated based on plan rules for use in determining credited service for a plan participant (or for a non-participant if eligibility has been met).

Consolidated reporting
Option that enables packaged reports to be processed for all organizations (consolidated).

Customer-defined value used in the formula to calculate a new salary grade midpoint value.

Context-sensitive help
Information about an object and its current condition. It answers the question 'what is this?'

Contribution type
The type of contribution being made to a benefits plan. The system allows for the deduction and accumulation of up to five different contributions per plan: basic employee pretax, basic employee posttax, supplemental employee pretax, supplemental post-tax, and organization.

Control 1-2
A company or group of employees (now known as an organization).

Control levels
A hierarchy of values used to determine the breakdown of an organization for reporting purposes. The values are user-defined.

Control number
An alphanumeric designation assigned to a table to define the table records that will be used for each organization.

Conversion
A method for transferring data from either a manual or automated system into the system.

Co-ordinator
A coordinator is an instructional institution, organization or person who administers training courses.

Core plan
One of the plans that make up the minimum benefits in which all eligible employees are required to enroll—for

example, medical and life. Employees who fail to return enrollment forms with their benefit choices may be automatically enrolled in the core plans (also known as default plans).

Cost categories
Cost categories are classifications or divisions used to separate costs for training into broad groupings, for example, equipment or operating costs.

Cost types
Cost types are used to further define training costs. For example, the category of equipment could be further broken down into the cost type of overhead projector and monitor rental.

Costing
Projecting the future cost of a benefits plan contribution for budget purposes.

Course
A course is a separate unit of instruction in a subject being administered using the training administration solution. For example, 'eCyborg: Using the Web Client′ is a course. This may be applied to a training course provided internally or externally.

Course directory
A course directory is a list of all available courses.

CPI
Characters **p**er **i**nch

Credited service
The number of years of employment for which an employee is given credit for use in determining final benefits amounts.

Crew
A group of employees who rotate from one schedule assignment (shift) to another, following a rotation pattern.

Crew code
A unique, one-character, alphanumeric identifier of a crew.

Cross-reference keys
Provide direct query access to data within the system database.

CSL
Abbreviation for ***Cyborg Scripting Language*** (on page 347).

Cumulative data
Also called 'to-date data'. includes payroll earning, deduction, net pay, taxable wage, and tax to-date figures for employees.

Cursor
A special symbol, usually a solid rectangle or a blinking underline character, that signifies where the next character will be displayed on the screen. To type in different areas of the screen, you need to move the cursor. You can use the arrow keys or a mouse to move the cursor.

Customer-defined
Values that depend on an organization-specific definition--for example, option list.

CYB88X
An English Language root program used to set the production version switch to on or off, in addition to other automatic settings.

Cyborg Scripting Language
Cyborg's fourth-generation programming language, previously called English Language.

Data extract
Method for extracting information from The Solution Series for the purpose of subsequently loading it into eCyborg Interactive Workforce databases.

Data load
The process of moving data from one system or media to another. It encompasses data mapping, data extraction and conversion, and the actual loading of the data. Also the method of loading data extracted from The Solution Series into eCyborg Interactive Workforce databases using programming scripts.

Data mapping
The process of identifying, comparing, and matching data (field to field) to be converted from one system or media to another.

Database
A collection of information organized so that a computer program can quickly search for and select

specific pieces of data. Think of a database as an electronic filing system.

Datamart
Relational tables with a defined structure that have been designed to automatically accept full datamart extract data seamlessly.

Deduct credits by plan
A method of distributing flexible benefit credits. The total monetary value for credits is prorated based on the employee's pay frequency. Credits are given to employees as earnings added to their pay; the cost of individual employee plans are collected through payroll deductions and listed on the employee's payment stub.

Deduct credits by plan method
A method of distributing flexible benefit credits. Credits are given to employees as earnings added to their pay; the individual employee plan costs are then collected through payroll deductions.

Deduction
An amount subtracted from available net pay. Deductions can be involuntary (child support or maintenance) or voluntary (pension plans).

Deduction cycle
A predetermined schedule for taking voluntary deductions, based on the defined frequency.

De-enrollment
The process of shutting off plan benefits for an employee for reasons other than a separation activity.

Deferred compensation
Any benefit that is not immediately payable to an employee, but is instead deferred to a later date. This term refers to retirement vehicles, including all defined benefit, defined contribution, stock, and thrift/savings plan.

Deferred plan
Any benefits plan in which benefits are not immediately payable to an employee, but are deferred to some later date. This term refers to retirement vehicles, including all defined benefit, defined contribution, stock, and thrift/savings plans.

Delimiter
A character that tells the system where an item of data ends and another starts.

Dependent
An individual who relies or depends on another for his or her support.

Dependent number
A unique number in the eCyborg Interactive Workforce database that identifies an employee's spouse and his or her other dependents.

Detail page
A page in eCyborg Interactive Workforce that displays detailed information. Summary pages contain links to the detail for each record.

Dialog box
A secondary window that appears on the screen to present information or request input. Dialog boxes are generally temporary—they disappear after you enter the requested information.

Disability insurance tax
A tax required by some us states to be funded by employee-paid contributions to pay all or part of the cost of disability insurance coverage. On the Payroll Solution, us state disability insurance tax records are established as Type 4 taxes.

Disciplinary action
Action taken against an employee for violation of an organization policy or procedure.

Discretionary increase
A salary increase amount or percentage determined by a manager according to the guidelines established by the organization.

Display
Make data or images display on a computer monitor.

Display box
An area on a form in which data is displayed (formally known as an inquiry field).

Disposable income
For garnishment purposes in the us, an employee's earnings minus deductions required by state or federal law.

Distributed location
A customer location where data changes are replicated and may be distributed. A DL is identified to the system by a unique 5-position alphanumeric node ID.

Distribution
The process of passing data from a source DL to one or more target DLs.

Distribution rules
A set of parameters that determine how data will be distributed from one DL to another. These are defined at each DL by the owner using the distribution rules screens. Distribution rules are stored in tables that are not replicated (thus, they cannot be distributed).

DL
Abbreviation for ***distributed location*** (on page 349).

Double-click
Click a mouse button twice in rapid succession.

Drop-down list
A drop-down list is a view of the acceptable entry options available for a text box.

Drop-down list box
A standard windows control that displays a current setting but can be opened to display a list of choices. The user selects a choice by double clicking on the choice. The user can type into the field, and the system moves the list of choices to the last letter typed.

Dynamic SQL
Statements created by a program that must be interpreted and converted to executable sql statements at run time.

Earned income credit
A refundable amount that reduces the tax owed by certain low-income individuals in the us who meet adjusted gross income levels.

Earning
Money paid in return for work performed or services rendered. In Payroll Administration, earnings are separated by earning numbers into various categories such as regular pay, overtime pay, shift pay, bonuses, and so forth.

Earnings category
Used to categorize similar earnings. For example, all the overtime earnings can be grouped into category 01, all the shift differentials/premiums into category 06, and so forth.

EBCDIC
Extended **B**inary **C**oded **D**ecimal **I**nterchange **C**ode; binary code for alphabetic and numeric characters developed by IBM for its computers.

eCyborg Interactive Workforce Home
Button on every page that returns the user to the eCyborg Interactive Workforce Home Page.

eCyborg Interactive Workforce Home page
Home page that displays each time employees log on to eCyborg Interactive Workforce after completing the new user tasks on the New User Home page.

Effective date
Date on which an event takes place, for example, an enrollment or benefits plan change.

EIC
Abbrevation for ***earned income credit*** (on page 349).

EL
Abbreviation for English Language, now called CSL (Cyborg Scripting Language).

Electronic Performance Support system
Online tools that help users perform their job quickly and efficiently. EPSS can include online help, computer-based training (CBT), electronic manuals, wizards, and so on.

Email
Literally 'electronic mail'. This is a message that is sent to one or more people within or outside of your organization by an automated email software package.

Employee cancellation
An employee cancellation occurs when an employee is canceled from attending a training class or training program.

Employee Database
The file that contains organization and employee records. This is File02. It was formerly known as the Master File.

Employee Database record
The complete record for an employee. It may be composed of multiple physical records.

English Language
Former name of Cyborg's fourth-generation programming language, now called Cyborg Scripting Language.

Enrollment form
A customer-defined form used by employees to record their benefits elections and any associated dependent and/or beneficiary information.

Entitlement accrual
An accumulation of hours for an employee benefit, such as sick leave or vacation time, commonly known as an accrual.

Entity
Each Organization Unit, Job, Position, and Incumbent is an entity. Together they are entities.

Entry field
An area on a screen or browser page where the user can input information.

Entry form
An entry form is a form used to enter data.

Environment
The host platform and workstations where your Cyborg system resides, and any communication protocols. Also, a work space dedicated to a specific processing type. For example: development, test, and production.

EPSS
Abbreviation for ***Electronic Performance Support system*** (on page 349).

Establishment Reporting
Establishment Reporting occurs when an employer with several business locations chooses to file wage reports, broken down by location or unit, to the Social Security Administration. Each unit is identified by a four-character code, called an Establishment Number. The employer obtains approval from the SSA to use Establishment Reporting. Establishment Reporting does not apply to 1099s.

Event
The combination of a trigger (changes made to system data) and an action (the creation of an email or letter). Events always consist of these two component halves.

Excused absence
Absences from regularly scheduled work that can be considered as either paid or unpaid time off.

Extract file
A data file generated to be used by another system or application.

Federal Insurance Contributions Act
The United States Federal Insurance Contributions Act imposes two taxes on both employers and employees. Tax is withheld from an employee's wages to finance the Old-Age, Survivor's, and Disability Insurance (OASDI) social security program and the Hospital Insurance (HI) medicare program. Employers are then required to match the amounts withheld from employees. On the Payroll Solution, employee information for FICA-OASDI social security tax is entered on tax record 101 and FICA-HI Medicare tax on tax record 103.

FICA
Abbreviation for Federal Insurance Contributions Act.

Field
A data item on the database. This is usually displayed on a form as a text box.

eCyborg Interactive Workforce specific—A space allocated for a particular item of information. A tax form, for example, contains a number of fields: one for your name, one for your Social Security number, one for your income, and so on. Every field has a name (also called a field label).

Filter
Device used by report to select certain rows of information from the database, thus limiting the amount of data from the database to be viewed in the report.

Finished
Users click Finished when they have completed all information on a checklist or other *ESS* page.

Flat rate tax
A US local tax that is calculated as a standard percentage rate and that is calculated in the same way for all employees (that is, factors such as marital status do not enter into the calculation). For many such local taxes, Cyborg does not provide tax specification information on the Tax Authority File. Instead, you need to enter a Tax Specification Record for the tax on a Tax Specification Information form, indicating the tax rate in the Flat Rate text box.

Flex credits
Units granted to an employee in order to purchase benefits under a Flexible Benefits Program.

Flex Master Plan
Defines your Flexible Benefits Program and ties component plans together as a group. Employees are enrolled in the Master Plan and then select the benefit plans in which they wish to participate—for example, medical, dental, and life. Flex master plans are set up in Benefits Administration and used by eCyborg Interactive Benefits to display benefit plans to users for initial and open enrollment.

Flex plan
A benefit plan where, in addition to a core of basic benefits (if applicable), the organization/company allocates to each employee a credit for purchasing additional benefits tailored to their individual needs. Flexible benefit plans may include a flexible spending account.

Flexible Benefits Plan
A specific type of benefit plan that allows employees to select their benefits from a number of benefit plans. This term may be used interchangeably with cafeteria plan.

Flexible Benefits Program
A benefits program in which an organization may allocate to each employee a pool of credits or a monetary amount that is to be used to purchase benefits tailored to individual needs.

Flexible Spending Arrangement
A benefits welfare plan set up as an account in an employee's name that is used to reimburse the employee for certain personal expenses. In the United States, these accounts are provided by employers as a way for employees to pre-fund dependent care, legal services, or medical expenses with pretax currency.

Folder
Logical organization device for the content of a Cognos catalog.

Form
A window of information that appears within The Solution Series, including text boxes and other controls. This was formerly known as a screen.

Form area
An area of the window that contains a form.

Form Builder
A tool provided by Cyborg Systems for use with The Solution Series for designing forms.

Formal education
Education that is obtained from a college or university.

Forward
Displays the next page.

FSA
Abbreviation for Flexible Spending Arrangement.

FTE
Abbreviation for Full Time Equivalent.

FTP
File **T**ransfer **P**rotocol. A means of allowing a user on one computer to transfer files to and from another computer over a network

Full Time Equivalent
The ratio of total working time to the time that represents full time employment for a single employee. For example, an FTE of 0.5 means working half of the time that represents full time employment.

Funeral days
Absences from regularly scheduled work due to a funeral, which at the discretion of the organization, can

be considered as authorized or unauthorized, paid or unpaid time off.

Gap analysis

Comparison of a current state of being with a desired state of being. For example, you could perform a skill or competency gap analysis on individual employees or on the workforce as a whole, comparing the existing state of skills and competencies with the required state or level of skills and competencies.

Garnishment

A legal procedure authorizing a deduction from an employee's earnings to satisfy a legal requirement.

General ledger interface

A file that provides a balanced payroll journal for the period. This file contains journal entries for labor expenses, withheld deductions, income, disability, UI, and other withheld taxes, net pay, and company-paid taxes. The interface may also be produced on paper.

Go to details

Displays a new page with detailed information. Used on summary pages.

Graphical User Interface

The Solution Series provides integrated human resource and payroll functionality via the Microsoft Windows Graphical User Interface. These are the elements that display on your screen.

Grievance

A formal complaint made by an employee against the organization usually because of an unsatisfactory working condition or other work-related dispute.

Gross wages

The total of all earnings paid to an employee.

It is stored in the Total Pay (field 119 of the US Tax Authority File) field of the employee's US FICA tax record 101 (FICA-OASDI). This figure appears on the Combined Register (2222) report as Total Pay. It does not appear on US W-2 forms.

Group box

A standard Windows control that groups a set of controls.

Group plan

Defines any number of benefit plans tied together as a group. Group plans are used to define common eligibility and to cluster plans for reporting purposes.

GUI

Abbreviation for Graphical User Interface.

Handicap

Having a physical or mental disability that substantially limits activities especially in relation to employment or education.

Health and safety profile

Data on the employee record that includes information such as the employee's blood type, language, physician, emergency contacts, and any disabilities.

HED

Acronym for Hours, Earnings, and Deductions. Each earning or deduction must be established in The Solution Series with a unique identifying three-digit code. HEDs are used to record pay, hours worked, and deduction amounts and arrears for each employee.

Help

Hot spot on an eCyborg Interactive Workforce page that displays step-by-step directions for completing the page.

History record

Part of an employee's payment history; a snapshot of a check paid to an employee or an adjustment made to an HED or tax.

Holiday days

The time off that all employees are entitled to based on the decision of the organization or government regulation.

Home page

The main page of a Web site that generally serves as an index or table of contents to other documents stored as pages on the site.

HTML

Abbreviation for **HyperText Markup Language,** the authoring language used to create documents on the World Wide Web. HTML defines the structure and layout of a Web document by using a variety of tags and attributes.

Import facility
A tool delivered with The Solution Series that moves data from an external source to any organization or employee form.

Import record
A line in a spreadsheet or delimited file that contains employee or company data.

Inactive plan
A benefits plan that no longer allows employee enrollment.

Inactive tax record
An employee tax record that is no longer in effect for a given employee. Neither wages nor taxes are accumulated for the particular tax record. However, any wages and/or taxes already accumulated remain until clearing is performed. Such clearing is usually performed in preparing the Employee Database for a new year. The inactive records can be deleted at this time. The process of making a tax inactive is called deactivating.

Incumbent
An incumbent is an employee linked with a specific position. The linking of an employee with a Position is an incumbency. An employee may be linked to more than one position; in other words, an employee with multiple incumbencies. A position to which more than one employee is linked has multiple incumbents.

Information-level security
These records grant access to employee and table data via specific password records.

Initial Administrator
Only user whose user ID and password are created during installation. The initial administrator always has authority to all administrative functions: eCyborg Interactive Workforce, Human Resources Administration, Benefits Administration, and Payroll Administration, and can assign administrative roles to others by creating administrative user IDs and passwords.

Initial passwords
Password generated by eCyborg Interactive Workforce for each user ID extracted from The Solution Series. Users must create a user-defined password when they log on to eCyborg Interactive Workforce for the first time.

InitialAdmin
See Initial Administrator.

Inquiry form
A inquiry form is a form used to view data already entered.

Instructional text
Any paragraph(s) on the page that explain the function of the page or fields to the user.

Internal candidate
An employee of your organization who is applying for another job or position in your organization.

Internet
A global network connecting millions of computers.

Intranet
A network belonging to an organization, usually a corporation accessible only by the organization's members, employees, or others with authorization and used to share information.

Investment funds
Different options or accounts available to employees for allocating their contributions, usually applicable to thrift/savings plans.

IPEDS
Integrated Postsecondary Education Data System.

Job assignment
A job associated with a particular employee.

Job code
A designation for a job assignment.

Job streams
A generic reference, Job Control Language, for your operating system's command language.

Alternately: Jobstreams

Job type
A generic category that further defines a particular job.

Jury duty
This is compulsory service on court appointed juries. Employers are required by law to excuse jury duty

related absences. They are not, however, required by law to pay the employee during this time away from the job.

Label
Text that describes the information the user enters into the field.

Labor record
A record containing the hours, amounts, associated charge-to control levels, and function assigned on the employee's Payroll Home Location/Pay Allocations form.

Leave of absence
Occurs when an employee leaves the organization for a period of time, usually temporary, for personal reasons such as medical leave.

Log off
Logs the user off the system. When referring to the Log Off button, use initial caps.

Logical Employee Model
A collection of default employee information that is used to create a model. Logical Employee Model templates are used when hiring new employees to save time and ensure that critical information is established consistently and correctly. These were formally known as LMODELs.

LPI
Lines **p**er **i**nch

Mailing address
An address, other than your legal residence address, to which you have your mail sent.

Maintenance payroll run
A maintenance payroll run automatically updates organization and employee records, but it does not process time entries or generate payments, pay slips, or deposit advices. It is also used to create payment history records.

Major activity
Event that causes a change in an employee's employment status, such as a new hire, termination, or rehire.

Mandatory field
A field that requires the user to enter information before the user can exit the screen or page.

Map file
Stores the predefined relationships between an import file and a form.

Mass time entry creation
Creating time entries for a group of employees through one program execution, such as for a paid holiday.

Master File (0202) report
A Cyborg report that produces a formatted display of the data in an employee's current batch Employee Database record. This includes the wages and taxes accumulated for the employee, covering current, month-to-date, quarter-to-date, and year-to-date information for individual tax codes. It is report generator 0202.

Matrix ID
Unique identifier for each pay-for-performance matrix.

Menu
A list of choices; the choices are generally links that take the user to another screen or page.

Menu bar item
A menu that appears on the menu bar.

Message area
An area of the window that contains messages or selection lists relevant to the current form. The Message Area can be turned on or off.

Method code
One of many specific routines (usually delivered by Cyborg and identified by a two-character code) used to calculate earnings and deductions.

Midpoint
The middle of the span of currency from the minimum to the maximum of the employee salary grade.

Minimart
Relational tables you create so you can insert data from your Subset data extractions.

Monetary perquisites
A privilege or profit that an employee is entitled to that is incidental to regular wages or salary.

Moving expenses
The expenses incurred by an employee due to moving from one location to another for employment purposes.

Multiple master
A file compression technique that duplicates the current employee Permanent Master Record as many times as there are payments to that employee during one pay period. These multiple masters are detail records reflecting the amounts for the payment being made (current), and the adjusted MTD, QTD, and YTD totals. The system uses multiple master records to create history records showing the current payment figures only.

Navigation bar
In eCyborg Interactive Workforce the Navigation bar shows the name of the page you are using, for example, 'Mailing Address'. The top line of the Navigation bar shows the path you took from the Home page to reach the present page. Links on the Navigation bar let you return to the home page or log off the system.

Navigator
Left pane of the work area which forms the main method of moving through the forms. From the Navigator users select the component, process, and task in which they are interested.

Net credit method
A method allocating flex credits. An employee's cost of benefits is calculated as either a net cash earning or a net deduction from the employee's pay. The net amount is the difference, either plus or minus, between the credits allocated to the employee and the cost of his or her flex benefits choices.

New hire
Process of hiring a new employee for your organization.

New user
A user of eCyborg Interactive Workforce who has not yet completed reviewing and updating their personal information on the New User Home page.

New User Home page
Home page that displays for new users of eCyborg Interactive Workforce until they complete reviewing and updating their personal information.

Node
A Distributed Location.

Node ID
A unique 5-position identifier for a node. The naming convention is defined by the user.

Number registered
This is the number of employees registered for a training class. It is updated and displayed on the Class Schedule form.

Object
Each System Control Repository record type is assigned an object code. A single record type can have several object codes assigned to allow limited display.

Object key
A field that allows you to specify the System Control Repository record group you want to display. The value of this field is dependent on the type of information you want to display.

Obsolete plan
A benefits plan that will no longer be used.

Off cycle
An off-cycle payroll run is an additional payroll for the period just completed. An off-cycle payroll run is commonly used to process nonstandard payments, such as bonuses. It is sometimes referred to as an additional or bonus payroll run.

Online
Turned on and connected, for example, printers are on-line when they are ready to receive data from the computer. Users are considered on-line when they are connected to a computer service through a modem. That is, they are actually on the line.

Open enrollment
A period of time during which employees can enroll in or change their benefit choices for the upcoming year, generally in October or November.

Operator ID
A four-character code that identifies the user to the system.

Option
An item in the option list for a field. This was formerly known as a codeset item.

eCyborg Interactive Benefits and Benefits Administration specific—In Benefits, the plan coverage that an employee selects, such as single or family coverage.

Option button
A standard Windows control that allows you to select from a fixed set of mutually exclusive options (previously known as radio button).

Option list
An option list is a list of options that are available within a Text box. This was formerly known as a Codeset.

eCyborg Interactive Workforce specific—Options available in The Solution Series that the eCyborg Interactive Workforce administrator loads in to eCyborg Interactive Workforce. The options are then available in the drop-down list boxes in eCyborg Interactive Workforce.

Organization
A group of employees who are employed in a common structure, governed by the same set of rules or policies, and eligible for the same earnings and deductions For example, your organization may be structured into parts that represent employee groups such as active, union, retirees, applicants, and so forth.

Formerly known as a company or Control 1-2.

Organization Level 3
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so forth, as defined by you.

Organization Level 4
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Level 5
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Level 6
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Number
A six-character user-defined code that represents an organization; the highest level of the organizational structure in Payroll Administration.

Formerly known as a Control 1-2.

Organization Unit
An organization unit ('Org Unit') is a grouping of Positions within an organization (for example, Accounts Department).

Organization Validation table
A table that validates that an organization is valid and payments can be made.

Organization-specific tax setup
A method of implementing Tax Specification Records in which each organization involved in tax processing contains all the specification records required to process taxes for its employees, as opposed to a common tax organization.

Override file
A file used to maintain COBOL or Report Generator changes to the system.

Packaged reporting
A processing mode in which a job is scheduled to be run at a certain time.

Paid absence
Employee absence that will be paid by the organization. A time entry will be created for this absence.

Parallel run
The process of executing the same programs simultaneously on two separate systems to obtain the same or similar results.

Parameter form
A form that is displayed when certain programs are called from the Navigator or menus. The form facilitates entering parameters for the program.

Password
A secret series of characters, generally user defined, that enables you to access a computer, a software application, or a file. On multi-user systems, each user must enter his or her password before the computer will respond to commands.

In eCyborg Interactive Workforce, the password ensures that unauthorized users cannot access user-specific information.

Password aging
The period of time that elapses before a user-defined password expires and the user must change his or her password.

Pay allocation
A means of allocating, on a percentage basis, employee labor hours and amounts to multiple sets of control levels 3 through 6 and function to accurately reflect employees whose labor must be charged to more than one area within an organization.

Pay document
A pay slip or deposit advice with its associated pay stub.

Pay frequency
The interval at which a group of employees is paid. Examples are weekly and semimonthly. Also referred to as a payroll period.

Pay schedule
A predetermined schedule for a calendar year, identifying period-end and payment dates for each pay frequency.

Pay stub
A preprinted form, corresponding to a check or deposit advice that lists all earning, gross pay, taxes, deduction, and net pay information for an employee.

Pay-for-performance matrix
Chart representation of the variables that result from the combination of salary increase information, how much to give and when.

Payment history record
A record documenting the detail information for a payment or adjustment. Multiple payment history records may be generated for an employee, reflecting multiple adjustments or payments. These records include all earning, deduction, and tax information included in the payment or adjustment.

Payroll home location
The location where the employee is normally assigned to work and where labor distribution information is charged. An employee's home location comprises specific Payroll Levels and is always assigned Allocation Number 01 on the Payroll Home Location/Pay Allocations form. The Function field may also be used as part of a home location, depending on your specific requirements.

Payroll Level 3
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so forth, as defined by you.

Payroll Level 4
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll Level 5
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll Level 6
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll period
A defined period of time for which an employer pays wages to employees.

Payroll Process Control
A series of forms used during the Payroll Process to determine the type of run (payroll run or maintenance run). Allows you to specify the pay frequencies to be paid and which reports are to be produced.

Payroll run
Updates organization and employee records, processes time entries, calculates employee pay, generates pay documents and payroll reports, including the Combined Register. It also produces a variety of special interface outputs.

PCL
Printer **C**ontrol **L**anguage

PDF
A file format that captures formatting information from a variety of desktop publishing applications, making it possible to have formatted documents appear on the screen and be printed. To view a file in PDF format, you need Adobe Acrobat Reader, a free application distributed by Adobe Systems.

Peer-group appraisal
Appraisal that uses performance evaluations completed by an individual employee's co-workers or project team members.

Pending de-enrollment segment
Plans for which an employee is enrolled, but has lost eligibility, as listed on the Pending Plan Enrollment/De-Enrollment form.

Pending eligibility segment
Plans for which an employee is eligible but not enrolled, as listed on the Pending Plan Enrollment/De-Enrollment form.

Performance appraisal
A periodic assessment and ranking of an employee's skills and accomplishments.

Performance appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from 1-Outstanding to 5-Unsatisfactory.

Performance rating
A method of ranking the performance of an employee during a given period using options ranging from 1-Outstanding to 5-Unsatisfactory.

Performance-related pay
Monetary payments made to employees based on how well an employee has fulfilled job expectations.

Perquisites
Property or privileges extended to an employee.

Personal days
Authorized absences that are generally considered as paid time away from regularly scheduled work, but can be either paid or unpaid.

Phonetic keys
The keys you use to access employee data using the phonetic spelling of an employee's last name.

Pixel
The smallest rectangular area of an image on a screen.

Plan deactivation
A process that makes a plan inactive and prevents future employee enrollment.

Plan ID
A three-position, alphanumeric identifier for a plan in the system.

Plan shutdown
The process of de-enrolling an employee from all benefits plans because of a separation activity.

Plan year
The 12-month period over which a salary budget is effective.

eCyborg Interactive Workforce specific—The calendar, policy, or fiscal year in which the records of a Benefits plan are maintained.

Policy tables
Highest level tables that are used to record the generic (or master) rules for an organization or group of employees. These included your organization's rules relating to working time procedures, such as clocking in and out, docking for lateness, and overtime. Each

policy consists of a Policy Master table and one or more Policy Activities table.

Pop-up menu
A menu that appears when you use the second mouse button within the system. This menu contains context sensitive commands and options that relate to the object you have clicked on.

Portable document format
See PDF.

Position
A specific role with an organization—for example, Accounts Manager.

Alternative definition: to place an object in a specified location.

Position Administration Control Number
Two-character alphanumeric value that tells Position Administration which tables to use for a specific company.

Position complement
A 'Position complement' is the value of a Position. The organization complement is the total value of all Positions included in the complement.

Position in range
The difference between a given salary and the minimum of the salary range, divided by the difference between the range's maximum and minimum, and expressed as a percentage.

Posttax
A contribution made after taxes have been withheld from earnings.

Premium
The amount of money an organization agrees to pay an insurance company for a policy or annuity, or the amount contributed by an employee to the employer to cover the employee's portion of the total premium.

Prenotification
Informing a bank or credit union that an employee will be using direct deposit with them in the future. Cyborg recommends that you fill out the Direct Deposit Information form two pay periods in advance of the first deposit date. This ensures that a prenotification record is provided to the bank or credit union in a timely manner.

Pretax
A contribution made before taxes have been withheld from earnings.

Primary account
The account set up in eCyborg Interactive Workforce to receive an employee's pay or reimbursement checks. After deductions and deposits to additional (secondary) accounts, the remainder of pay is deposited into the primary account.

Process
A subset of a component that logically groups tasks on the Navigator or menu. For example, the process 'Maintain Employee Details' contains tasks such as 'Basic Employee Information' and 'Personal Information'.

Alternate definition: An action that brings about a result.

Process bar
The graphical representation of a process on the navigator. Each process bar is within a Component.

Program
A program is a series of classes being administered using Training Administration. For example, 'The Cyborg Training Schedule for January-June 1996' may be a program consisting of eight different classes.

Alternative definition: a form or other program within the system, accessed directly from the Command dialog box. For example, form EF-SCR is a program.

Protected amount
The amount of disposable income protected from garnishment in the US This amount may vary from state to state.

Prototype HED
An HED defined on a benefits form for use in recording employee/organization contributions when an employee is enrolled in a benefits plan. This allows the setup and maintenance of payroll deductions using Benefits Administration.

Provider
A provider is an instructional institution, organization, or person who is available to teach training courses.

Push button
A button on the interface which appears depressed when clicked on (now known as command button).

Quartile
Points that represent the division of a salary grade range into four equal parts.

Query alternate keys
The keys you use to access the employee master record in an order other than by primary key.

Query primary keys
The keys you use to direct your QUERY program to a record type.

Quick Hire
The process of hiring an employee by entering one two-panel form with the required data elements rather than entering a series of forms.

Radio button
A button on a form that selects an option, the radio buttons that make a field are mutually exclusive (now known as an option button).

Recall
Return a laid-off employee to active status, usually with no affect to benefits.

Reciprocal taxation
Reciprocal tax withholding refers to agreements made between US states and (or) localities regarding income tax calculation and reporting for compensation paid to an employee who lives in one state or locality and works in another.

Record
A complete set of fields, such as the fields that make up a tax form or a name and address record.

Alternate definition: To set down for preservation in writing or other permanent form.

Recruitment
Process of finding and hiring new employees who meet the needs of your organization.

Recycle File
P05IN; A file that contains employee data and pay document information required for payment reconciliation. It also contains time entries to be processed and paid at a later date. This file is used to pass data to the next payroll or maintenance run.

Registration
Registration is the act of enrolling an employee in a class.

Registration number
A three-digit registration number is assigned to employees for tracking purposes when they register for a training class. This enables the order in which the employees registered to be viewed.

Rehire
The process of hiring a former employee of your organization. Typically, a break in service is incurred and benefits must start over (usually requiring a new adjusted seniority date if used in benefits tracking).

Reimbursement account
The account into which employee's travel and other expense type reimbursement checks are directly deposited.

Reinstatement
The process of returning a former employee to active status within a certain time period (such as 90 days), thus qualifying the employee to have certain benefits restored to the original hire date.

Reject time
The point at which an error condition will occur. An error condition must be manually corrected/approved and approved before a time entry can be generated by the system.

Relocation
The process of moving an employee from one organization to another geographic location, whether the move be domestic or international. This process also applies to applicants who are being relocated as part of the hire process.

Remaining net pay
The 'bucket' of money that is left after all employee deductions and taxes have been taken from the employee's gross pay. This 'bucket' of money can then be used for multiple deposits if the enterprise sets up multiple deposit HEDs.

Replication
The automatic process of writing changes made in the Employee Database and option lists and tables in the System Control Repository to the Replication Holding File (FILE08).

Replication Application
English Language program (DSAPLY) that reads records from the Replication Packet File (FILE20) produced by the Replication Reception program (DSRECV) and updates the System Control Repository and Employee Database accordingly.

Replication Distribution
Two COBOL programs that work together to distribute and receive updates. The Replication Distribution Program (DSTRIB reads either the Replication Holding File (FILE08) or a Replication Packet File (FILE20), selects data applicable to a specific DL and writes all necessary data to a new output-only Replication Packet File (FILE21). The resulting FILE21 will be processed on the remote DL via the DSRECV Replication Reception program.

Replication Holding File
FILE08. This file contains additions, changes, and deletions to the System Control and the Employee Database. Data is distributed from and written to this file, based on the data distribution rules configured for the target DL by the source DL.

Replication Packet File
(FILE21/20). This file contains data changes and is created specifically to update a target DL. This information may include Company/Employee data, tables and option lists, and time entry and adjustment records.

Report
The term report refers to a report produced on paper.

Report Generator
A program that produces the batch payroll and the batch payroll reports.

Report Group
A series of packaged reports that are created using the Report Group Activities form and are run together.

Report Group Scheduler
This is the program that allows you to schedule reports. This was formerly known as the Report Scheduler.

Report parameters
Specific guidelines for determining the information to be processed by a given report or program.

Requisition
A formal request to fill a vacancy or vacancies.

Requisition candidate
A candidate for a vacancy represented on a requisition.

Requisition limit
A total unit value of a requisition.

Requisition unit
The value of a requisition expressed as an FTE, hours, salary or headcount.

Retirement
Occurs when an employee retires from the organization.

Return
The activity of an employee returning as an employee to active status, usually following a leave of absence.

Alternative definition: key on keyboard used to perform a carriage return, can also be known as Enter.

Review process
A method used by an organization to evaluate an employee's salary or performance in a standard, timely manner.

Roll-up reporting
Option that enables packaged reports to be processed within organizations (roll-up).

Rotation pattern
A way of describing the working pattern for a group of employees (crew) who regularly work different shifts.

A crew is a group of employees who together regularly work the same schedules according to a rotation pattern.

Safety standards
Legally-mandated workplace safety standards.

Salary budget record
Defines, for each employee, the budgeted increase amount, percentage, and effective date for a specific salary plan year, and the prorated effect of this increase on the budget in terms of amounts and percentages for each employee.

Salary grade
A range of salary amounts associated with a particular job.

Salary grade range
A range of salary amounts associated with the salary grade for a particular job.

Salary plan
A set of rules or guidelines used to budget for salary increases for the coming year.

Salary plan year
A 12-month period over which a salary plan is effective.

Salary range
The span of salary amounts from the minimum to the maximum of the employee salary grade.

Salary review
A periodic evaluation of an employee's compensation.

Salary review authorization form
Hard copy format of the employee criteria necessary to review and approve proposed salary increases.

SAT file
The Solution Series form appearance table. Simple text file that reflects the form's layout.

Save Changes
Saves the page (form) the user completed. (When you click 'Save Changes', eCyborg Interactive Workforce saves the information on the page whether or not the user made changes.)

Schedule Activities table
Identifies activity types for each point in a work day where the process of clocking in and out should be dealt with. Each Schedule activity also contains time parameters that will be used to calculate whether an employee will be docked or credited time.

Schedule assignments
Also referred to as a schedule. This term refers to the details of the Schedule Master tables to which an employee is assigned. These details include the date the assignment took place, the Schedule Number and Sub-Schedule Number, and (if applicable), the crew to which the employee is assigned.

Schedule error
Occurs when a clock transaction (ring) time falls outside of an employee's schedule reject times.

Schedule Master table
Used to set up your organization's Time and attendance rules (such as HEDs and the minimum number of hours an employee must work before a meal deduction is made). A Schedule Master table is associated with a Calendar Routine, earnings Code, and Shift Premium table by entering the appropriate identifier.

Schedule number
A unique three-character alphanumeric identifier used to partially identify a schedule table.

Screen
Now known as a form.

Scroll bar
When information on a page takes up more than one screen of your monitor, the system adds scroll bars to the right side of the screen. On the scroll bar:

- Click the up arrow to move line by line to the top of the page
- Click the down arrow to move line by line to move to the bottom of the page
- Click the double arrows to move several lines up or down the page

Click and drag the bar in the scroll area to manually move up or down the page.

Search argument
The value from an employee's master record used to search benefits tables to apply plan rules to specific groups of employees.

Search type
The definition of a field from an employee's master record to use as the search argument.

Secondary account(s)
Additional account or accounts at financial institutions that employees set up in eCyborg Interactive Workforce receive a portion of their pay. A primary account must be defined before an employee can set up additional accounts.

Security Officer
The assigned employee who is responsible for the setting up and monitoring of the security your Cyborg system.

Self-adjusting taxes
Taxes for which the system automatically recalculates the tax on a cumulative year-to-date basis on each payroll run.

In the U. S. these include FICA taxes: Social Security (tax record 101) and Medicare (tax record 103). The purpose of this calculation is to avoid any differences (of pennies) in FICA tax paid versus FICA tax due at year-end due to rounding on a pay period basis. In addition, certain state disability taxes and employee-paid state unemployment insurance taxes also self-adjust.

Sequential Master File
P20IN; The batch processing version of the Employee Database. This file contains organization and employee data, tax tables, and the object code for programs.

Service interruption
A period of time during which an employee did not maintain an active working status in the organization.

Service method
A calculation option list that determines the method for calculating credited service.

Session
When users log onto a software application, they begin a session. When they log off, they end the session.

Alternate definition: The period of time during which a class is held.

Shift
An employee schedule assignment for a given day. For a rotation pattern, this is a Sub-Schedule Number.

Alternative definition: key on keyboard, typically used to describe key combinations for a shortcut key.

Shift premium
A premium (or differential) added to an employee's regular earnings, overtime earnings, or both. It is represented by a shift code or HED Number.

Shortcut menu
A menu that appears when you right-click within The Solution Series 4. This menu contains context-sensitive commands and options that relate to the object (form, Navigator, and so on) on which you have clicked.

Sick days
The time off that an employee is allowed to take due to illness as a result of an employment contract or organizational policy.

Solution View
An online utility that provides the tools for creating new forms, fields, and report programs without the direct use of Cyborg Scripting Language.

Source DL
The node that owns the data being distributed. Depending on the rules established, the same DL can alternate from source to target.

Special assessment
Extraordinary or temporary taxes, such as additional employer-paid or employee-paid contributions to state unemployment programs or to mandatory health insurance programs.

Spinbox
A control on the interface composed of a text box and increment and decrement buttons that allow you to adjust a value from a limited range of possible values.

Spreadsheet application
Software for recording ledger entries, creating worksheets, graphing data, and other accounting functions.

Standalone Time and Attendance
Customers who are using the Cyborg's Time and Attendance Administration but not the Cyborg's Payroll Administration.

Static data
Includes organization and employee information, such as name and salary.

Static SQL
Data Definition Language (DDL) and Data Manipulation Language (DML) statements embedded in application programs.

Status bar
The bar that appears at the bottom of The Solution Series window. The Status Bar displays useful information, such as your current session number, the currently displayed organization and employee, and so forth.

Statutory employee
Any of the four categories of workers who are independent contractors under common law and are treated by statute as employees. These include:
(1) a driver who distributes beverages (other than milk) or meat, vegetables, fruits, or bakery products; or who picks up or delivers laundry or dry cleaning, if the driver is your agent or is paid by commission.
(2) certain types of full-time insurance sales reps
(3) an individual who works at home on materials supplied by you that must be returned to you
(4) certain full-time traveling or city salespeople.

Social Security and Medicare (FICA) taxes may or may not be withheld. Income taxes are not withheld from a statutory employee. A statutory employee will receive a W-2 with the ‘Statutory Employee’ box checked.

Sub-schedule number
A two-digit numeric text box used to further identify a schedule table.

Succession planning
Finding and developing employees for placement into identified key positions that are expected to become vacant sometime in the future.

Summary page
To help you see information at a glance, eCyborg Interactive Workforce uses summary pages. The summary page displays a short view of detailed information. For example, all your emergency contacts appear on a summary page. You delete the contact or proceed to the detail for the contact from the summary page.

Summary plan
A customer-owned description of a benefits plan.

Supplemental wages
Wages that are separate from regular earnings may be classified as supplemental wages and taxed using the default method. The default method means using a set percentage specified by the tax authority. Examples of such earnings are bonuses and commissions.

Surplus
A 'surplus' is an exceeded complement position.

System administrator
An individual responsible for maintaining a multi-user computer system, including a local-area network (LAN). Typical duties include:

- Adding and configuring new workstations
- Setting up user accounts
- Installing system-wide software
- Performing procedures to prevent the spread of viruses
- Allocating mass storage space

System Control Repository
This is the file that contains system definitions for The Solution Series*,* (FILE01).This was formerly known as the Control File.

System Generator
A type of Report Generator that performs system functions, such as defining data elements and system messages.

Table
Contains an organization's rules and policies and controls what actions take place at the employee level.

Alternative definition: means of displaying information in columns and rows.

Table Definition Record
Table containing data about the Position Administration table records, including the location of keys to associated tables.

Target DL
The node that receives the data being distributed. Depending on the rules established, the same DL can alternate from target to source.

Task
The lowest level of organization on the Navigator or menu, generally equivalent to a form. checklist, or dialog.

Task icon
An icon denoting a task. Task icons describe the type of task, including Forms, Checklists, Dialogs and others.

Tax authority
A government agency to which an employer and employee has statutory tax obligations. The tax authorities for which you handle taxes exist at the federal, state/province, and local levels.

Tax Authority File
A Cyborg-supplied file that contains all the tax-specific information needed to calculate taxes for tax authorities. This includes wage-bracket tables for different marital statuses and information relating to allowances and standard deductions. The sources for the contents of this file are tax specifications published by the various tax authorities.

Tax code
The three-character to seven-character Cyborg-supplied reference code that identifies a tax and that serves as the link between the Tax Specification Record and the employee tax record.

Tax Maintenance File
One of the two Cyborg-supplied tax files. A Tax Maintenance File is a file issued by Cyborg in conjunction with a Tax Update Bulletin (TUB). It contains all the tax specifications that are being updated in the bulletin, in the form of tax specification transactions. These transactions are typically used as input to the batch maintenance run in which tax updates are applied.

Tax specification
Each tax authority publishes tax specification information that specifies how each tax must be administered. This information specifies how employers should calculate taxes and how taxes should be withheld from employees (if withholding applies). The tax specifications can be in the form of tax formulas and (or) tax tables.

Tax Specification record
A record on your Employee Database that contains the tax specifications for a tax. The record contains all the information, as obtained from the governmental authority, needed to calculate tax amounts for the tax. The record may contain more than one tax; for example, US state Tax Specification records contain information for both state income tax and state unemployment insurance. Once a Tax Specification record is activated, tax specification information from the Cyborg-supplied tax files can be loaded onto the record on your Employee Database.

Tax table
A set of information required to calculate a tax, for a specific set of employee parameters. Tax tables are stored and maintained in Tax Specification records. A table typically includes wage and bracket information and data relating to allowances, such as personal exemptions and to standard deductions. There can be several tables relating to marital and resident status in a given Tax Specification record.

Tax type
This term refers to various categories of taxes, for example, income, National Insurance, unemployment, disability, Social Security (FICA-OASDI), and Medicare (FICA-HI).

Taxability
The term refers to whether an hours, earnings, and deductions amount is to be included in taxable wages to be accumulated for a specific tax. If the hours, earnings, and deductions amount is excludable, then the amount is not included in taxable wages. If the hours, earnings, and deductions amount is taxable, then the amount is included in taxable wages. The term fully excludable or fully taxable implies that more than one type of tax is being referenced, for example, state income tax and state unemployment insurance in the US.

Taxable wage base
The taxable wage base represents the maximum amount of an employee's wages on which tax is levied and after which there is no liability. A wage base in the US

typically is in effect for FICA, unemployment taxes, and disability.

Tax-related Regulatory Bulletin

A TUB contains the updates to tax specifications supplied by Cyborg, consisting of a bulletin document, a tax file that contains the updated tax specifications, and a printed listing of tax specification transactions with the updates.

TDR

Table Definition Record.

Template

A basis from which to create a custom item. For example, you can use an existing Cyborg report as a template for your custom report.

Temporary password

A set of alphanumeric characters used with a user ID to limit access to a software application. The system requires that users replace their temporary password with a user-defined password within a certain number of days.

Termination

The activity of an employee no longer being employed by the organization.

Test environment

A separate organization or system partition used only for testing.

Text box

A control on the interface in which text can be entered and edited (formerly known as a field).

Text qualifier

The character surrounding an item between delimiters. All values between the qualifier are data items and are not scanned for a delimiter. This allows a delimiter character, such as a comma, to be a valid data item. Example:

"item 1","item 2","item 3, 4 and 5"

This string contains three data items:

Item 1

Item 2

Item 3, 4 and 5

Although the third item contains a comma, it is ignored as a delimiter because it is between the text qualifier of speech/quotation marks (").

Time entry

The form in which you enter the hours worked for an employee. This was formerly known as a Time Card.

Time entry extract file

A file of time entries external to the Time and Attendance Solution that is used to feed to payroll.

Time entry validation

The Time Entry Validation/Creation program identifies and assigns an activity, for example Clock In (1), to each clock transaction (ring) when performing the validation function. Each clock transaction must be assigned to an activity, in order for time entry hours to be calculated for an employee, for a particular shift. This program validates clock transactions (rings) and generates time entries.

Timeout

The period of time that elapses before a user's eCyborg Interactive Workforce account becomes invalid because of inactivity.

ToolTip

A standard Windows control that provides a small pop-up window that provides descriptive text, such as a label, for a control or graphic object.

Top-down appraisal

Appraisal made by a supervisor or manager of an employee's capabilities. Such an appraisal is generally based on the supervisor's or manager's day-to-day observation of an employee's work performance and will usually include an appraisal interview with the employee.

Trainer

Trainers are set up on the Provider Index Form. They are instructional institutions, organizations or persons who are available to teach a training class.

Trainer code

The trainer code is a four-character value that represents a trainer. This value resides in Option List TR38.

Training area
The training area is recorded on the Class Schedule Form. It is typically defined as the section of the organization to which the training applies, such as manufacturing.

Training class results
These are the class details and absence information recorded on the Process Class Results form. Details recorded include the objectives met when taking a training class.

Training class status
The status value is updated and displayed on the Class Schedule Form. It tracks whether the training class is canceled, full or available.

Training course code
The training course code is a six-character value that represents a training course. This value resides in Option List TR33 and is associated with a course title.

Training plan
A plan of training courses that an employee will attend in the future to achieve the necessary skills to perform a job.

Training reason
The reason for training is used to identify why a training request has been made. For example, the purpose of the training to act as a refresher, to acquire new skills, and so forth.

Training request
A training request is a request for an employee to attend a specific course or class. A formal request for training is not essential. This step could be omitted and the employee could be registered directly in the course of his or her choice.

Transfer
Process of moving an employee from one organization to another organization, such as moving an applicant from the applicant organization to the active employee organization.

Alternative definition: to move data or files from one computer to another

Trend analysis
Reporting or statistics that indicate the rate of change in costs and other elements of a benefits plan.

Trigger
A set of conditions that must occur for an email or letter communication event to start. This can involve the creation, deletion, or modification of forms or checklists within the system.

Tuition reimbursement
Remuneration made to employees for tuition expenses.

Type of training request
The type of training request indicated whether the employee was required to attend the training or whether he or she asked to attend the training.

Unauthorized absence
Absences that are generally not considered paid time away from regularly scheduled work.

Underlined text
In browser applications, text that provides a link to another screen or page.

Unemployment insurance tax
A tax required by some US states to be funded by employee-paid contributions to pay all or part of the cost of unemployment insurance coverage. On the Payroll Solution, state unemployment insurance tax records are established as Type 2 taxes.

Unpaid absence
Employee absence that will not be paid by the organization. A time entry will not be created for this absence.

Upward appraisal
Appraisal that calls for evaluations by those who work under the direction of the employee being evaluated.

URL
Acronym for uniform resource locator. A standard way of specifying the location of an object, typically a web page, on the Internet. URLs are the form of address used on the World-Wide Web. They are used in HTML documents to specify the target of a hyperlink which is often another HTML document (possibly stored on another computer).

User class
Cognos Impromptu assigns security according to configured user profiles. These security profiles are configured by your Impromptu administrator.

User code
A set of characters (up to eighteen alphanumeric characters) that, along with the password, identify the user to the system as a valid user user when they log on.

The user code is case-sensitive (upper case, lower case) and must be entered using the correct case.

User defined password
A set of alphanumeric characters created by users that allows them to view and update information in a software application.

User ID
A set of characters that identify you to the software application. The application contains a list of authorized users by user ID. When you attempt to log on, the system checks the list of authorized users to determine whether you have authority to use the application.

User profile
Used for security purposes to determine what you can and cannot do while you are using the system, and which parts of the system you can access. A user profile is created and maintained for you by a Security Officer. Each user of the system will have a user profile.

Vacancy
An open position that needs to be filled, or an unfilled complement position

Vacation days
The time off that an employee is entitled to as a result of an employment contract or due to length of service.

Validation
The process where the Time Entry Validation program identifies and assigns an activity to a clock transaction (ring) when performing the validation function.

Variant forms
Method of displaying country-specific variation of Cyborg-delivered forms.

Waive
The act of choosing not to enroll in an optional benefits plan.

Warning time
Used to set a period of time after which an employee will appear on the exception report for a particular activity. A Warning condition will allow the creation of a time entry. A Reject condition will not. This is part of the Time and Attendance Administration.

Welfare benefit plan group
First level of the logical organization of welfare benefit plans in eCyborg Interactive Workforce.

Welfare benefit plan subgroup
Second level of the logical organization of welfare benefit plans in eCyborg Interactive Workforce.

Welfare plan
Any insurance or other benefit plan that provides immediate benefits to a participant—for example, medical insurance.

What-if mode
Method for processing a report that allows viewing of information without updating of employee records.

Window
A standard Windows object that displays information. A window is a separately controllable area of the form that typically has a rectangular border.

Wizard
A form if user assistance that automates a task through a dialog with the user.

Work area
The Solution Series screen. It includes the menus, toolbars, Navigator, forms area, message area, and status bar.

Work instructions
Specific tasks to be completed during the migration of data and files from test to production.

Work restrictions
Restrictions that prevent an employee from participating in specific workplace functions.

Worker's compensation
Legislation in the US that provides compensation to employees who suffer work-related injuries.

Workforce competency
The capacity of the overall workforce to perform required functions and sets of activities.

XHTML
Extensible HyperText Markup Language, used by the help pages for eCyborg.

Year End Master File
P20OUT file from the final payroll run of the year

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