LEARNING MANAGEMENT

VERSION: 07/2018

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1 Learning Management Overview

In this chapter, you will learn:

- The components of Learning Management
- How to create and delete a course and course group
- How to create a training facility profile
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- How to register a participant

Understanding Learning Management Administration

Overview

ConnectCarolina's learning management allows the departments who deliver training to create an online course catalog and schedule for each class session. The learning management system also allows faculty and staff to easily enroll themselves in course sessions using the self service option on the portal page. In addition, the system tracks participant registrations, sends out enrollment notifications, and provides a training summary for all users.

Creating a Course Collection

The department delivering the training creates courses in the system. These courses contain a description of the content as well as details about the instructor, training delivery method, location, and class size. Multiple course sessions are generated for each class to provide scheduling flexibility for participants. A session designates the date, time, and location the course is available during the year.

Tracking Resources

The system also identifies the resources used when scheduling training events. Training locations and rooms are tracked in the system along with instructors and the list of classes they are qualified to facilitate. This tracking helps eliminate the possibility of double booking resources.

Self Service

The Learning Management self service option provides three functions to faculty and staff, and is the starting point to enroll in a course session, cancel a course enrollment, or view their own training summary.

- Enrollment - Individuals can search for available training classes by course name, course number, training location, or training date. A complete list of open sessions is displayed. This includes information about the instructor, date, time, and location for a particular course. Users can see the number of people registered and immediately know if there is space available.

- Cancel Course Enrollment - This self service function allows users to easily cancel their own registration in a class. By clicking this link, the system displays a list of classes the user has enrolled in and their status in the class.

- Training Summary - Clicking on the Training Summary link displays a complete list of past, present, and future courses the person is registered in. The summary also includes the date and status of the class. Possible options for status include enrolled, waitlisted, completed, no show, and cancelled..

Notifications

The system provides email notifications of enrollment, course and course session updates, waitlist placement, and more to the participant and the participant's manager throughout the registration process.

This learning module helps UNC-Chapel Hill optimize the delivery of learning programs by providing administrative efficiencies behind the scenes, and a streamlined, convenient registration process for our faculty and staff.

Creating a Course Group

Overview

Creating a course group is the first step in listing a training class in ConnectCarolina's Learning Management System. The course group is the anchor by which you organize new courses and course sessions in the system. Once you define a course group, you need to submit a help request to gain access to this newly created holding spot for your courses. A description, email address, and email message are designated for each course group.

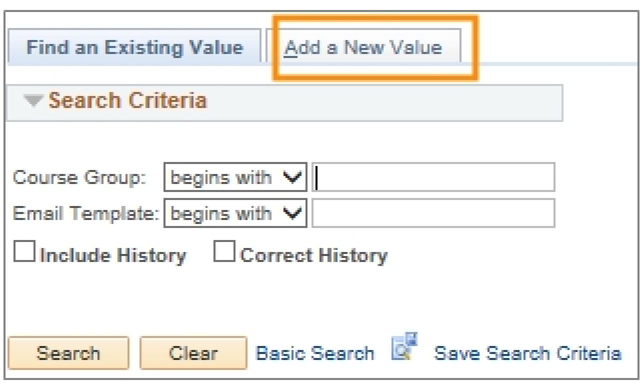
Creating a Course Group

Follow these steps to create a new course group:

1. Choose this menu option:

   Main Menu > HR/Payroll Menu> Administer Training > Define Course / Cost Details > Course Group

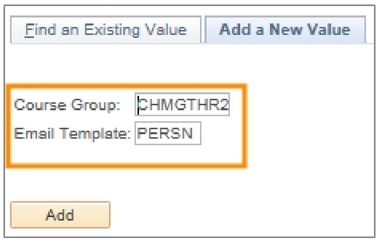
2. Click the **Add a New Value** tab.



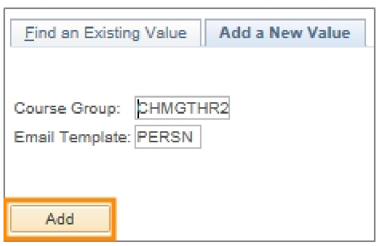
3. Complete the fields:

In this field:	Do the following:
Course Group	Enter a unique identifier that designates the course group. Departments can create their own course group using any combination of eight letters and numbers. The system automatically makes letters uppercase. Note: Try to use letters that mirror the course group's name. For example, CHMGTHR2 mirrors Change Management HR.

In this field:	Do the following:
Email Template	Enter a unique code that identifies the email template associated to the course group. Departments can create their own email template code using any combination of five letters and numbers. For example, PERSN.



4. Click the **Add** button.



Results:

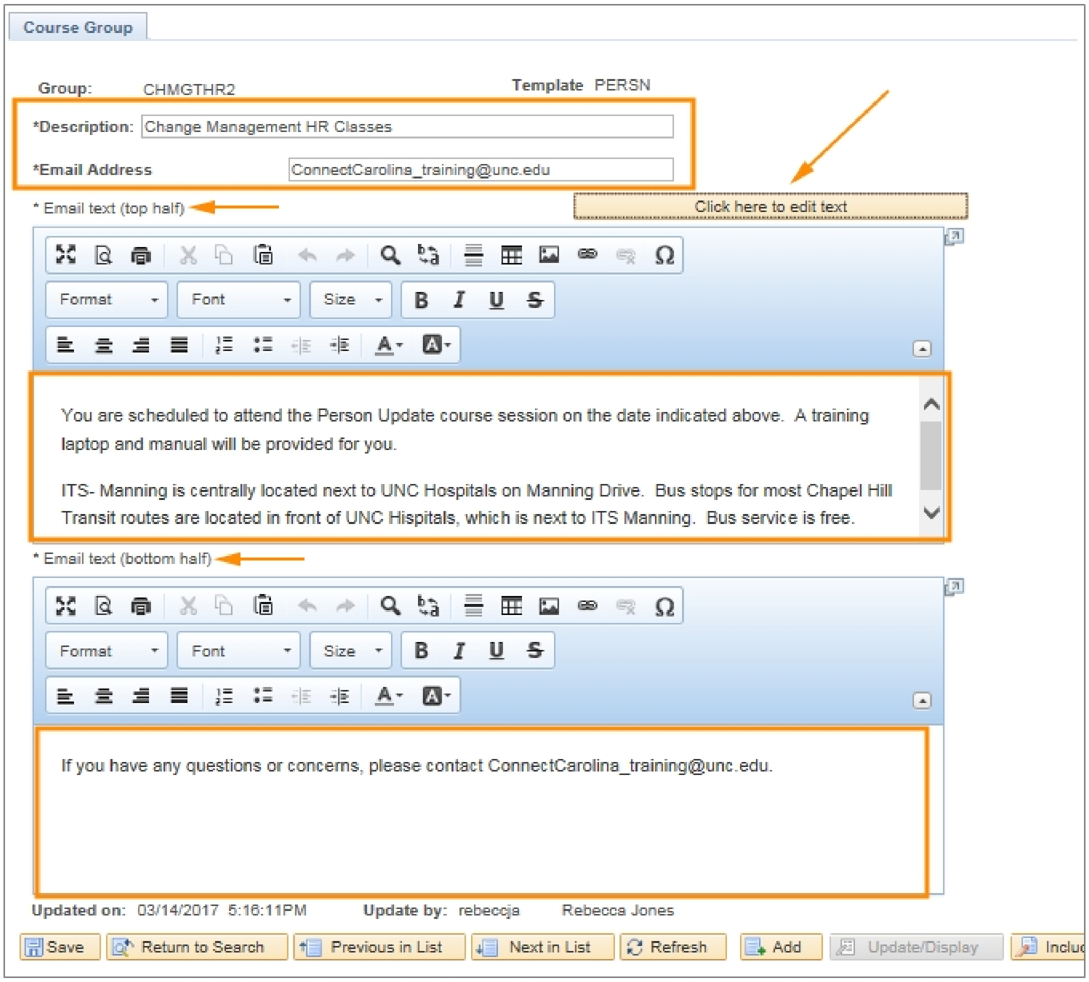
- The system displays the Course Group page.
- If you enter a course group that already exists, the system displays a link to that course group. If this happens, you need create a different identifier for the new course group you are adding to the system.

Course Group Tab

1. Complete the fields:

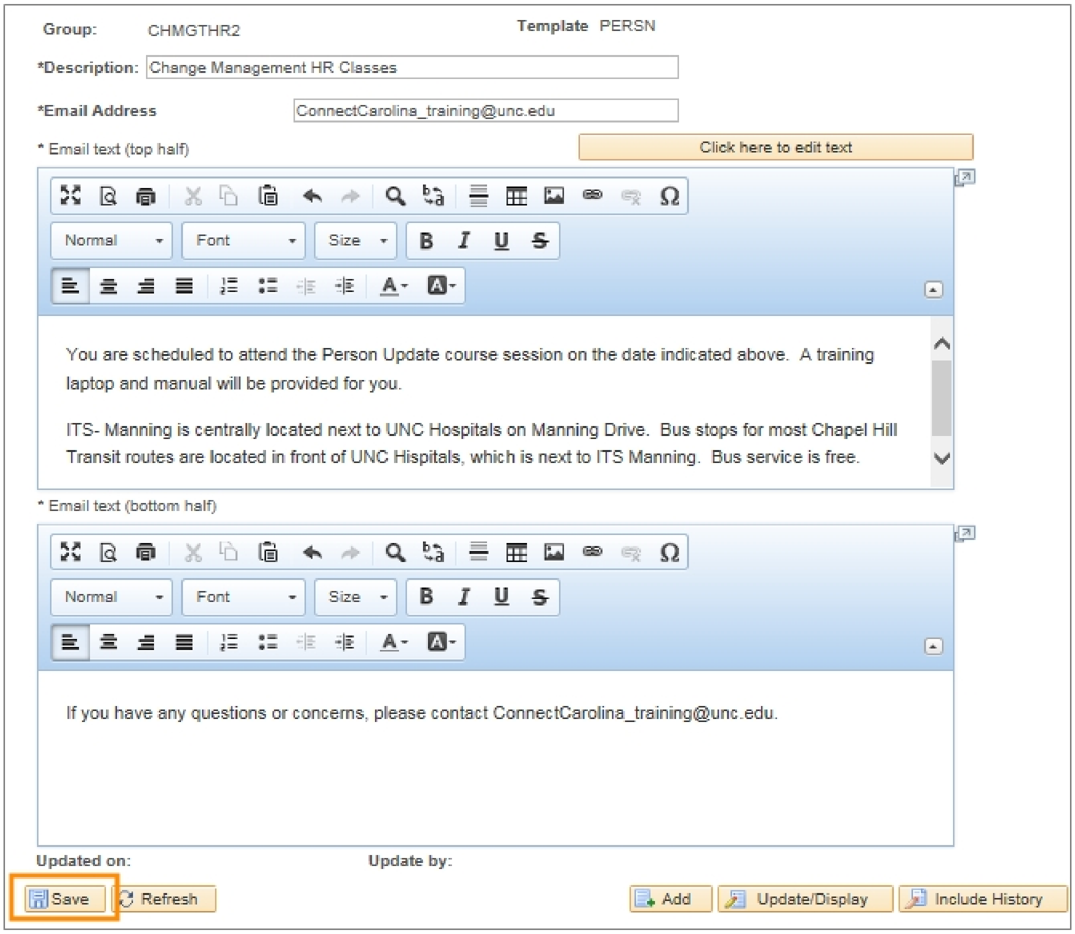
In this field:	Do the following:
Description	Enter a description of the Course Group using a maximum of 50 characters, Note: This description is used to describe the course group.

In this field:	Do the following:
Email Address	Enter the email address the email message will be sent from. This is the same email address that participants will reply to. Note: We recommend using a shared mailbox or listserv instead of a personal email.
Email text (top half)	Enter any message you want to include in the paticipant's confirmation of registration email. For example, you can include a welcome message, course material information, parking instructions, etc. This message is also included in the class reminder email as well as the email to the participant when there is registration movement from the waitlist to enrollment. Notes: • Course logistics such as time, date, and location are automatically included in the email text so there is no need to add it here. • Message is limited to 4,000 characters.
Email text (bottom half)	Enter information such as point of contact phone numbers and email addresses should your participants have questions related to the course. This part of the email is included in every email sent to participants from the course group.



Note: Do not use the "Click here to edit text" button when first creating a course group. After the course group has been created, this button allows you to edit your email text.

2. Click the **Save button**.



Result: The system creates a profile for the new course group.

Remember: You need to submit a help request to gain access to this newly created course group.

Creating a New Course

Overview

UNC-Chapel Hill provides many learning opportunities for our faculty and staff. As needs arise and new areas of development are identified, different courses are created. To ensure faculty and staff have access to these new opportunities, you need to first create a course profile in ConnectCarolina. The course profile contains a definition of the course's content, instructor, training delivery method, duration, the minimum and maximum number of participants allowed, and any course prerequisites. After the course profile is defined, individual course sessions can then be set up on a as needed basis enabling participants to register.

Related Reference

- Information about updating a course that already exists is available in Updating a Course.

Creating a New Course

Follow these steps to create a new course:

1. Choose this menu option:

   Main Menu > HR/Payroll Menu> Administer Training > Define Course / Cost Details > Courses

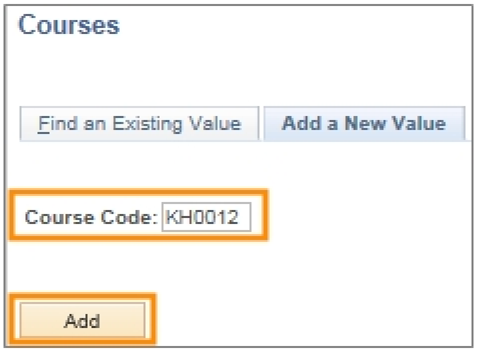
2. Click the **Add a New Value** tab.

3. Complete the field:

In this field:	Do the following:
Course Code	Enter the unique identifier you have assigned to the course. Each department can create their own course codes using a six character identifier. The recommended format starts with two letters, followed by four numbers. For example: AA1234. Note: Try to use alpha initials that mirror the class name

Note: If you enter a course code that has already been claimed by another course, the system will display a link to that class and you will have to use a different code for the course you are creating.

4. Click the **Add** button.



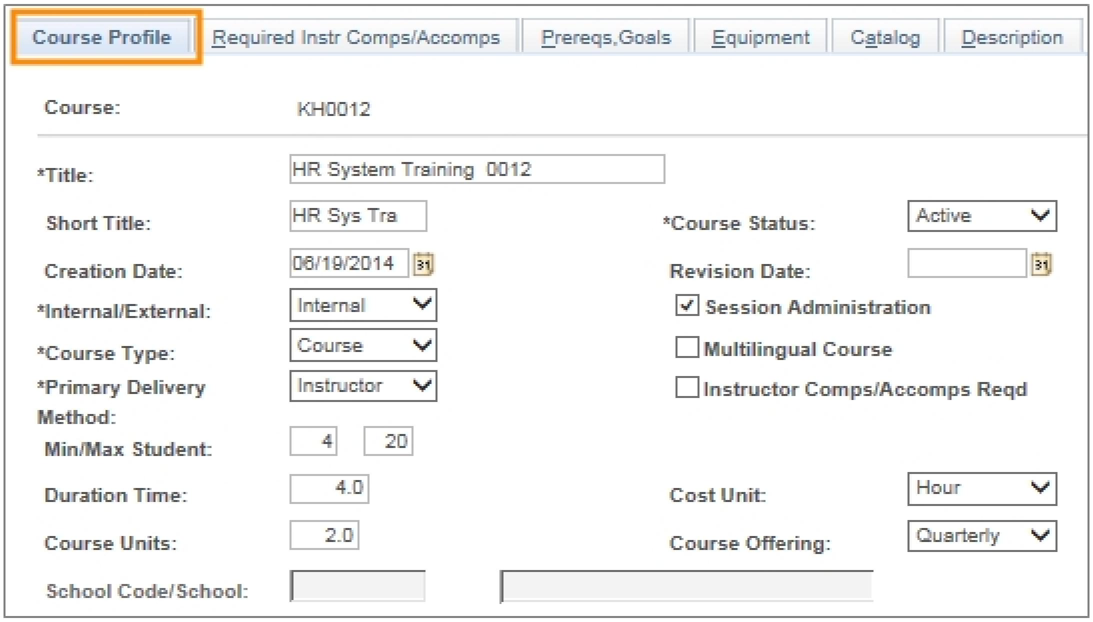
Result: The system displays the Course Profile tab.

Course Profile Tab

5. Complete the fields:

In this field:	**Do the following:**
Title	Using a maximum of 30 characters, enter the course's title.
Short Title	Using a maximum of ten characters, enter the course's short title. Note: The short name is used for reporting purposes.
Course Status	Leave the default value of Active.
Creation Date	Leave the default value of today's date.
Revision Date	Leave this field Blank.
Internal/ External	Leave the default value internal. Caution! This field value must be Internal.
Course Type	Leave the default value of Course.
Primary Delivery Method	Leave the default value of Instructor. Rarely used additional options are: • **Audio** for pre recorded content • **CBT** for computer-based training programs • **LunchLearn** for content delivered with lunch • **On-the-Job** for activities completed on the job site that accomplish training goals • **Video** for pre-recorded content • **Webinar** for interactive web-based delivery

In this field:	Do the following:
Session Administration	Always mark this checkbox. This enables multiple sessions for the class to be set up in the system.
Multilingual Course	Leave this field blank.
Instructor Comps/Accomps Reqd	Leave this field blank.
Minimum Nbr of Students	Enter the number of participants.
Maximum Nbr of Students	Enter the maximum number of participants. Caution! The system will not save the course session if you don't enter a value in the Maximum Nbr of Students field.
Duration Time	Enter the expected number of hours the class will last, in 0.00 format.
Cost Unit	Leave the default value as Hour. This describes the units used in the Duration Time field.
Course Units	Enter the number of course credits in x.y format if applicable.
Course Offering	Choose one of the following units of time for scheduled courses: • **Quarterly** for classes scheduled four times per calendar year • **Annually** for classes scheduled one time per calendar year • **As Determd** for classes scheduled as needed • **Half-Year** for classes scheduled twice per calendar year • **Monthly** for classes scheduled once per month • **Semester** for classes scheduled twice per academic year • **Trimester** for classes scheduled three times per academic year

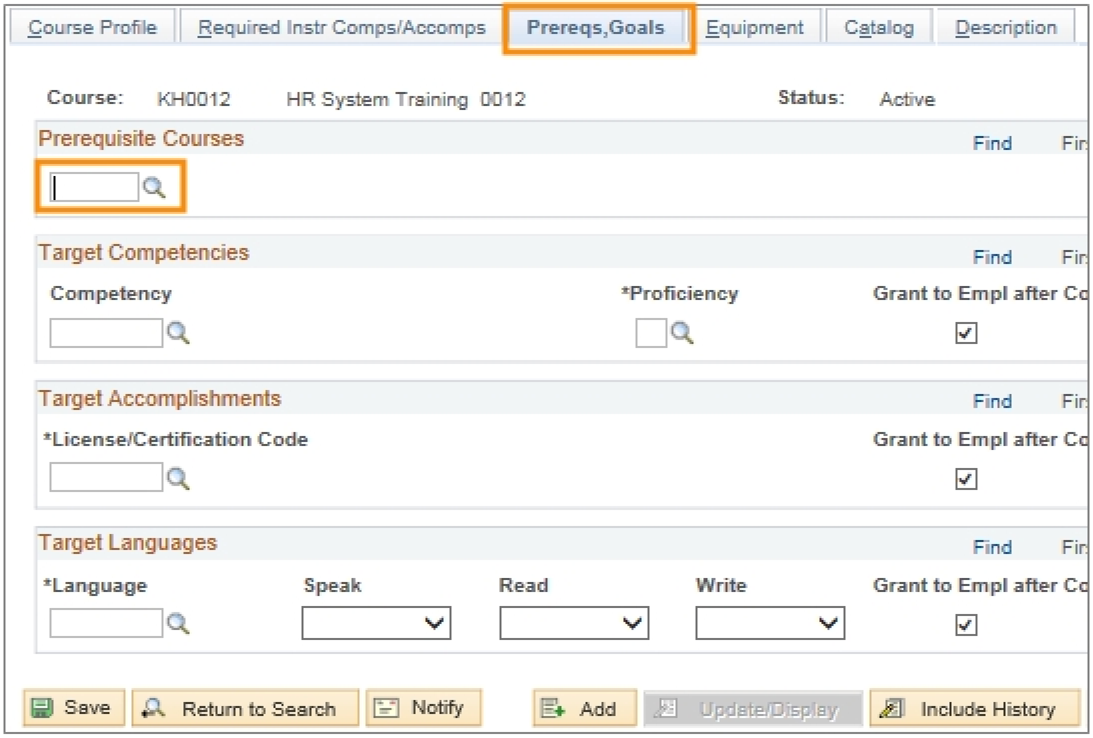


6. Click the **Prereqs, Goals** tab.

Prereqs, GoalsTab

7. Complete the fields if there is a prerequisite class identified for the new course:

In this field:	Do the following:
Prerequisite Courses	If the course you are creating has a prerequisite, look up, or enter, the prerequisite course's code.



8. Click the **Description** tab.

Description Tab

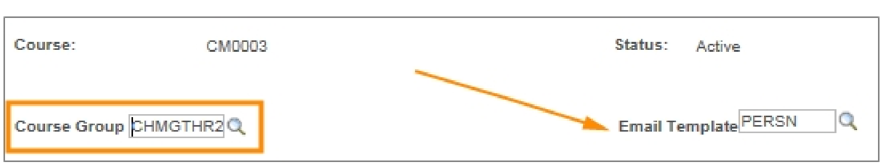
9. Complete the fields:

In this field:	Do the following:
Description Type	Always choose General.
Effective Date	Use the default: today's date.
Description:	Enter a description of the content covered in this class.

10. Click the **UNC Course Data** tab.

UNC Course Data Tab

11. In the Course Group field, enter the eight character course group identifier.

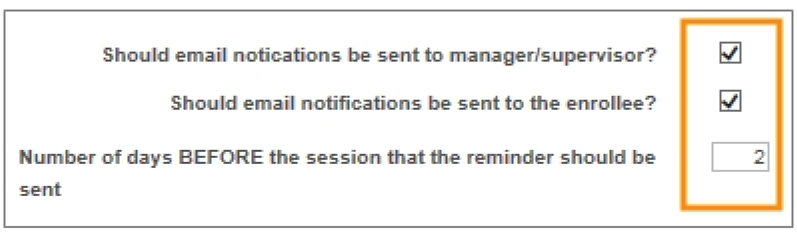


Result: If only one email template is associated with the course group, it automatically shows in the Email Template field.

12. In the Email Template field, enter the five charater email code.

13. Complete the following fields.

In this field:	Do the following:
Should email notifications be sent to manager/ supervisor?	This box is checked by default. If you do not want an email notification sent to the participant's manager/supervisor, uncheck this box.
Should email notifications be sent to the enrollee?	This box is checked by default. If you don't want email notifications sent to enrolled participants, uncheck this box.
Number of days BEFORE the session that the reminder should be sent	This field displays two days by default. You can change this field to any number. Note: The system counts holidays as regular business days.



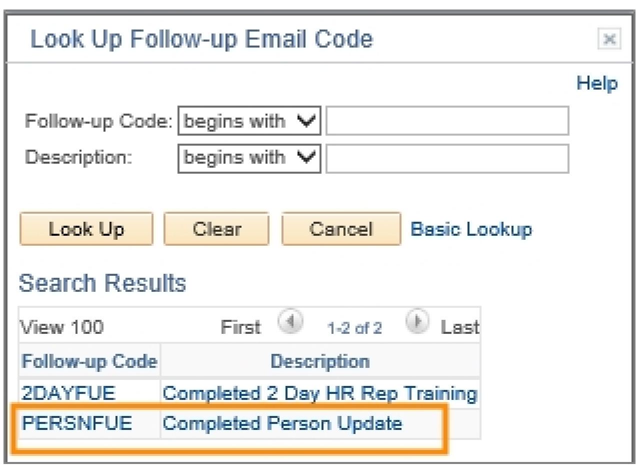
14. If you want to make the course private, check the box next to Should this course be considered PRIVATE or CONFIDENTIAL? Checking this box means supervisors will not be able to see that an employee registered for this class. This field is usually used for, but not limited to, classes of a personal nature not relating to the actual job. For example, *Planning for Parental Leave.*

15. If you want this course to be hidden so participants can't self enroll, check the box next to Should this course be hidden from self-service selection?

16. If you want to send a follow-up email to participants that have completed a course, enter the follow-up email code in the field. To search for and select a follow up email, click the **magnifying glass icon**.

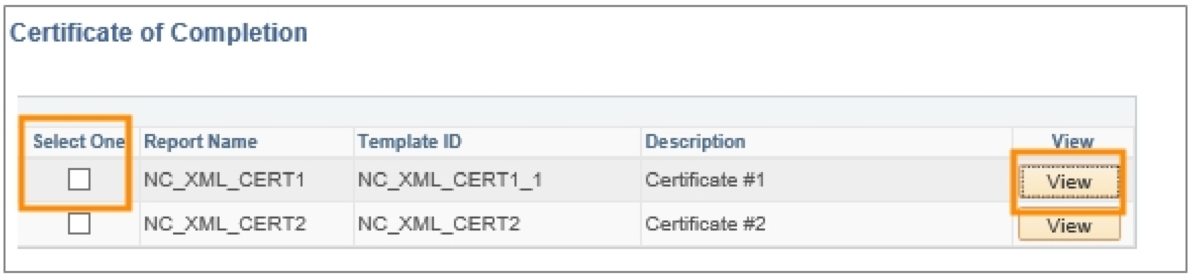
- Information about creating Follow-up Emails Adding and Deleting a Follow-Up Email

2. Click on the follow-up email you want associated with the course.



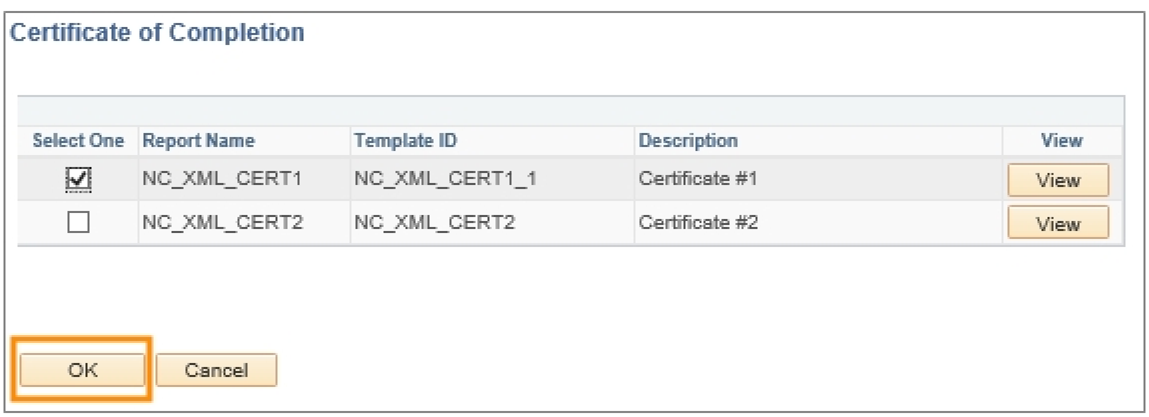
3. If you want to send a certificate of completion to participants that have completed a course, click **click here to select a certificate**.

4. Click the box of the certificate you want associated with the course. To view the certificate before selecting, click the View box that's on the same row at the certificate to preview the certificate in a new window.

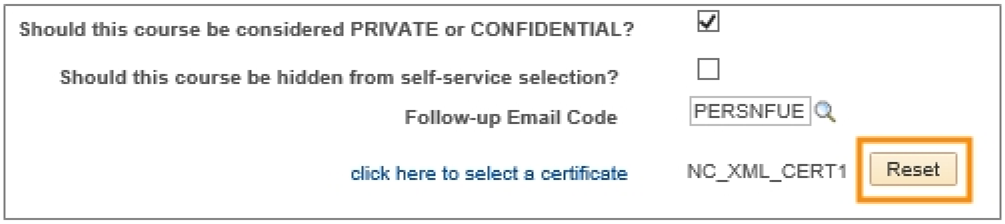


Note: All certificates available across campus are located here, so be sure to select the correct one.

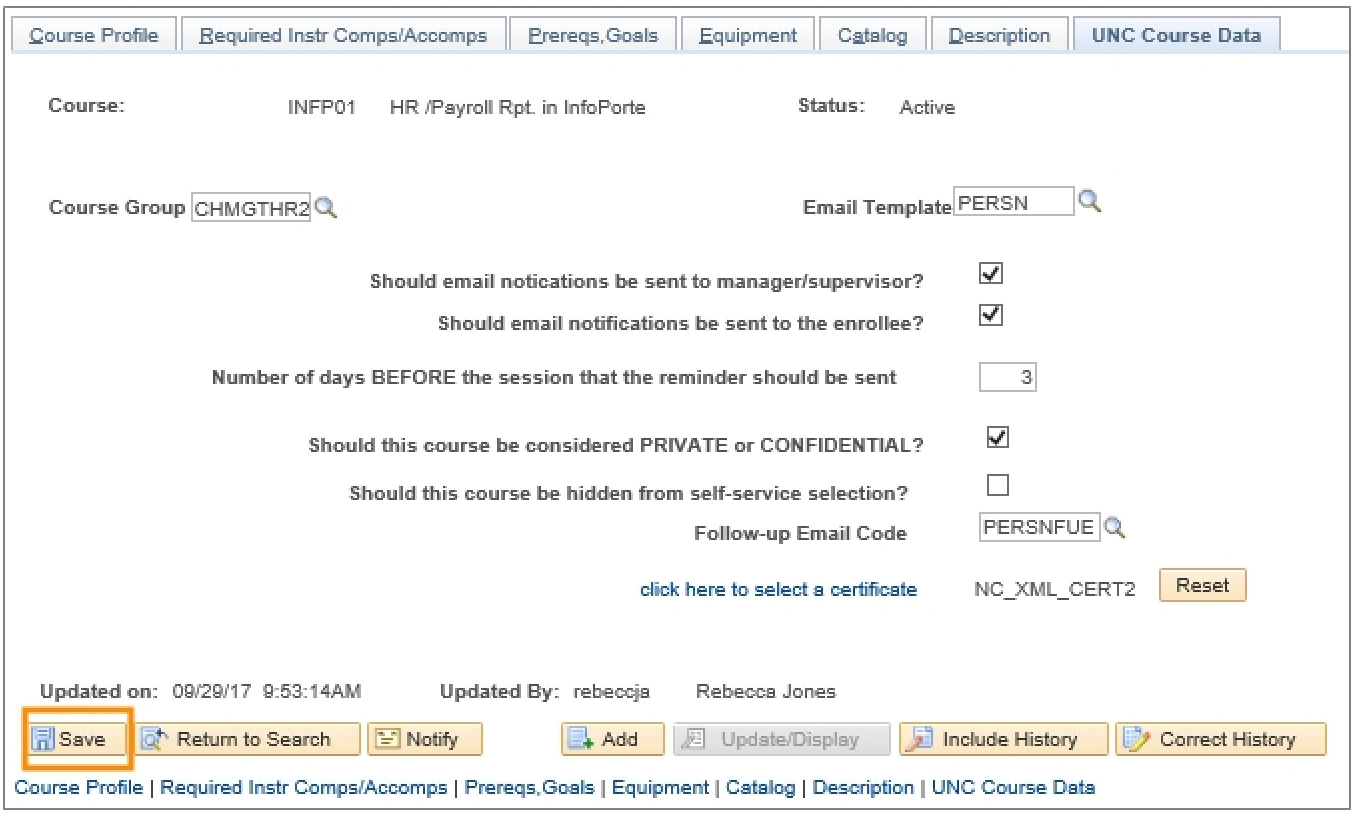
5. Click **OK**



6. If you want to remove a certificate from being associated with a course, click **Reset**



7. Click **Save.**



Result: The system saves the new course information.

8.

Creating a New Training Facility Profile

Overview

When creating a course session, you need to define the date, time, and location where it will take place. When a new location becomes available, its details need to be defined in the system. A facility profile contains information about a facility, including the address, telephone numbers, on-site contacts, and directions. You need to create the facility profile in the system before you can choose it as the location for a course session.

Creating a profile for each training facility allows you to designate that space in ConnectCarolina for a given course session. You still need to follow school, division, and department protocols for booking a room at the campus locations that group manages.

Related Reference

More information about course sessions is available under Create a New Course Session.

Steps - Creating a New Training Facility 's Profile

Follow these steps to create a new training facility profile:

1. Choose this menu option:

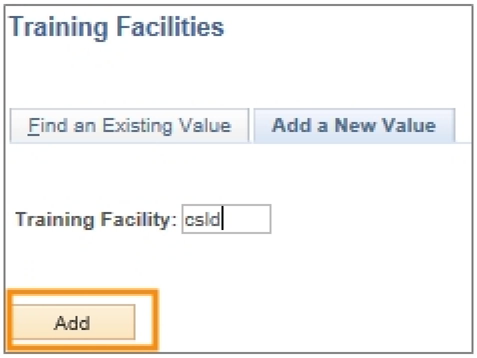
   Main Menu > HR/Payroll Menu > Administer Training > Define Training Resources > Training Facilities

2. Click the **Add a New Value** tab.

3. Complete the field:

In this field:	Do the following:
Training Facility	Enter a six-character, unique identifier for the new location. This field is not case sensitive. Note: If the system has already assigned the identifier to another location, you'll see a link to that facility, and you'll need to enter a different identifier.

4. Click the **Add** button.

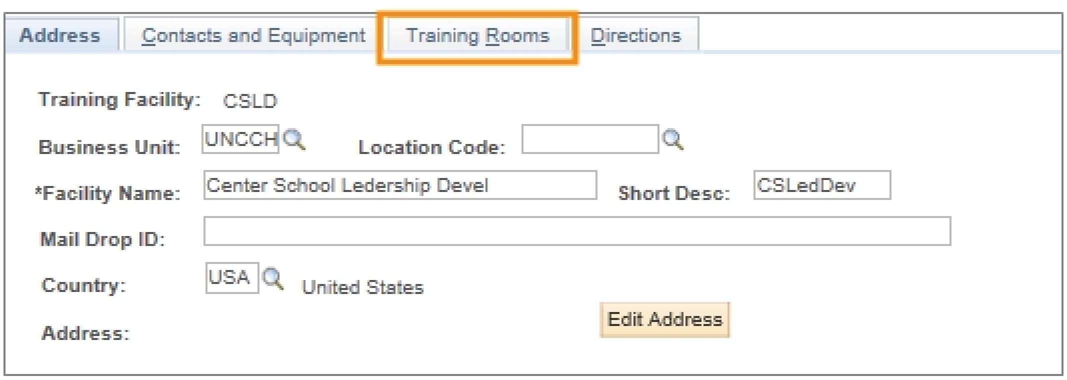


Result: The system displays the Facility Address tab.

5. Complete the fields:

In this field:	Do the following:
Business Unit	Leave the default value of UNCCH.
Location Code	Leave this field blank.
Facility Name	Using 30 characters or less, enter a descriptive name for the facility.
Short Desc	Using ten characters or less, enter a short descriptive name for the facility.
Mail Drop ID	Leave this field blank.
Country	Leave the default value of USA.

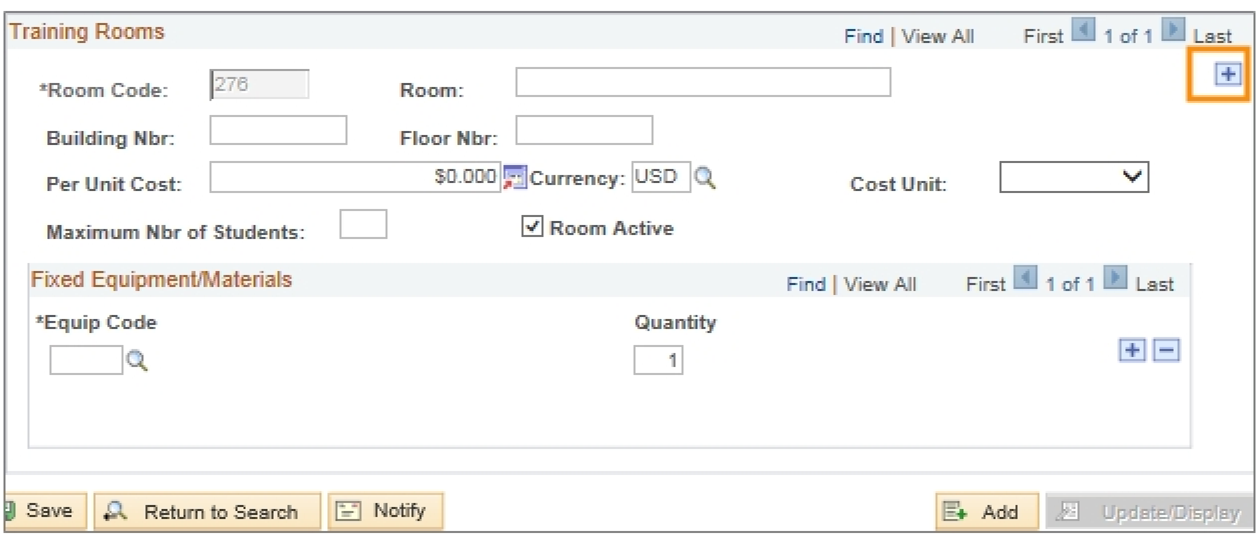
6. Click the **Training Rooms** tab.



7. Complete the fields:

In this field:	Do the following:
Room Code	Enter the room number.
Room	Leave this field blank.
Building Nbr	Leave this field blank.
Floor Nbr	Leave this field blank.
Per Unit Cost	Leave the default value of $0.00.
Currency	Leave the default value of USD.
Cost Unit	Leave this field blank.
Maximum Nbr of Students	Leave this field blank.
Room Active	Leave this checkbox marked.
Equip Code	Leave this field blank.
Quantity	Leave this field blank.

8. Click the **Add a new row** button to add additional rooms for this facility.

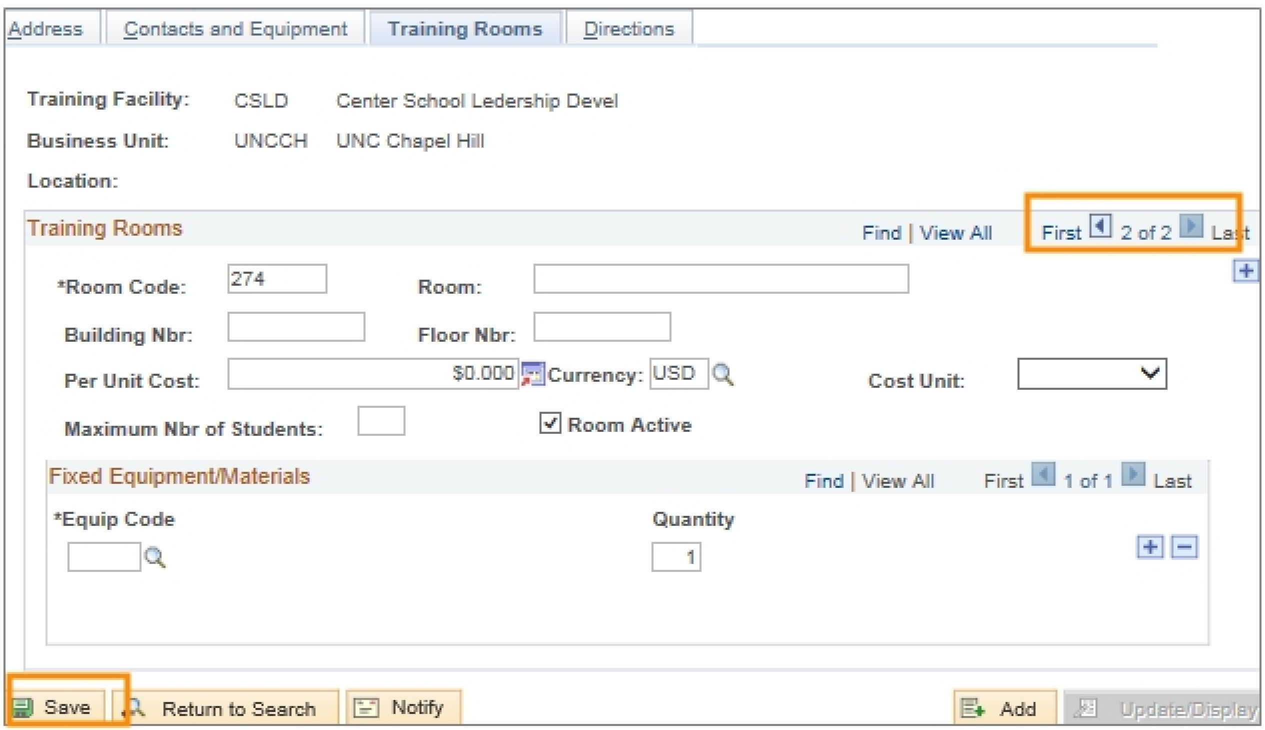


9. Complete the fields for each additional room:

In this field:	Do the following:
Room Code	Enter the room number.
Room	Leave this field blank.
Building Nbr	Leave this field blank.

In this field:	Do the following:
Floor Nbr	Leave this field blank.
Per Unit Cost	Leave the default value of $0.00.
Currency	Leave the default value of USD.
Cost Unit	Leave this field blank.
Maximum Nbr of Students	Leave this field blank.
Room Active	Leave this checkbox marked.
Equip Code	Leave this field blank.
Quantity	Leave this field blank.

10. Click the **Save** button.



Results:

- An additional row of information is created for each additional room.
- The system saves the new training facility and room numbers, and makes this facility available when you create a new course session.

Creating an Instructor's Profile

Overview

When creating a session for a course, you set the date, time, and location, and specify the instructor that will teach the course. Instructor information is maintained within the instructor's profile, and includes their effective date, area of expertise, and which courses they are qualified to teach. Before you can choose an instructor to facilitate a class, that instructor's profile needs to be in the system.

When you select an instructor for a specific session, you reserve that instructor's time in ConnectCarolina. The system does not allow you to create another session using the same instructor on the same day at the same time.

Related Reference

More information about course sessions is available under Create a New Course Session.

Steps - Creating an Instructor's Profile

Follow these steps to create an instructor's profile:

1. Choose this menu option:

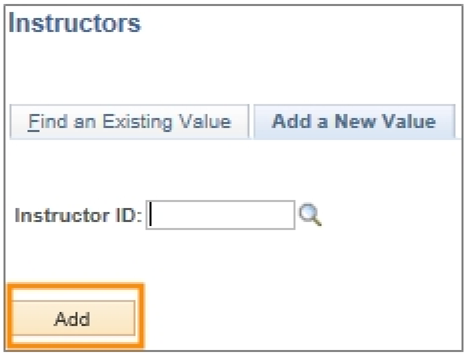
   Main Menu >HR/Payroll Menu > Administer Training > Define Training Resources > Instructors

2. Click the **Add a New Value** tab

3. Complete the following fields.

In this field:	Do the following:
Instructor ID	Look up, or enter, the Instructor's PID.

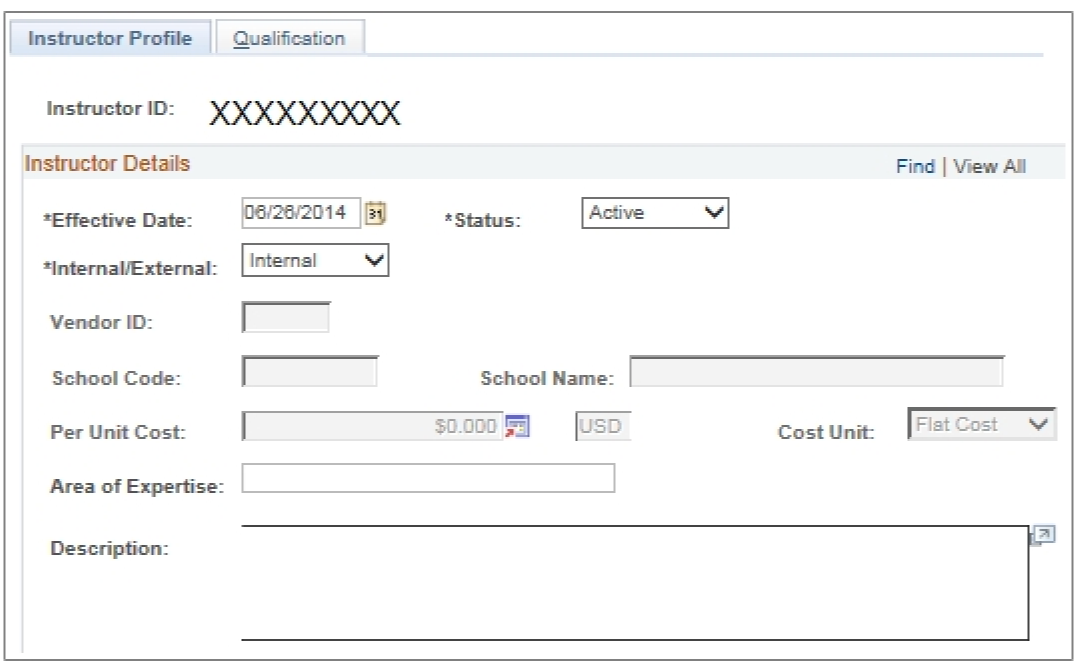
4. Click the **Add** button.



Result: The system displays the Instructor Profile tab.

5. Complete the fields:

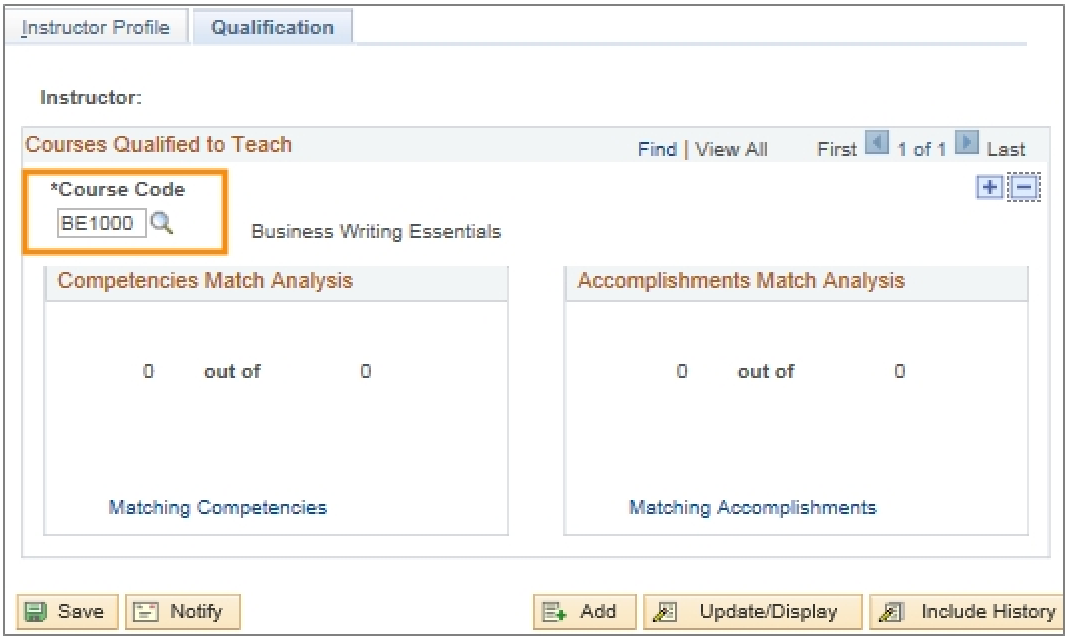
In this field:	Do the following:
Effective Date	Leave the default value of today's date. Note: If the first class this instructor is teaching has already occured, use the date of that class as the effective date.
Status	Leave the default value of Active.
Internal/External	Leave the default value of Internal.
Area of Expertise	Leave this field blank.
Description	Leave this field blank.



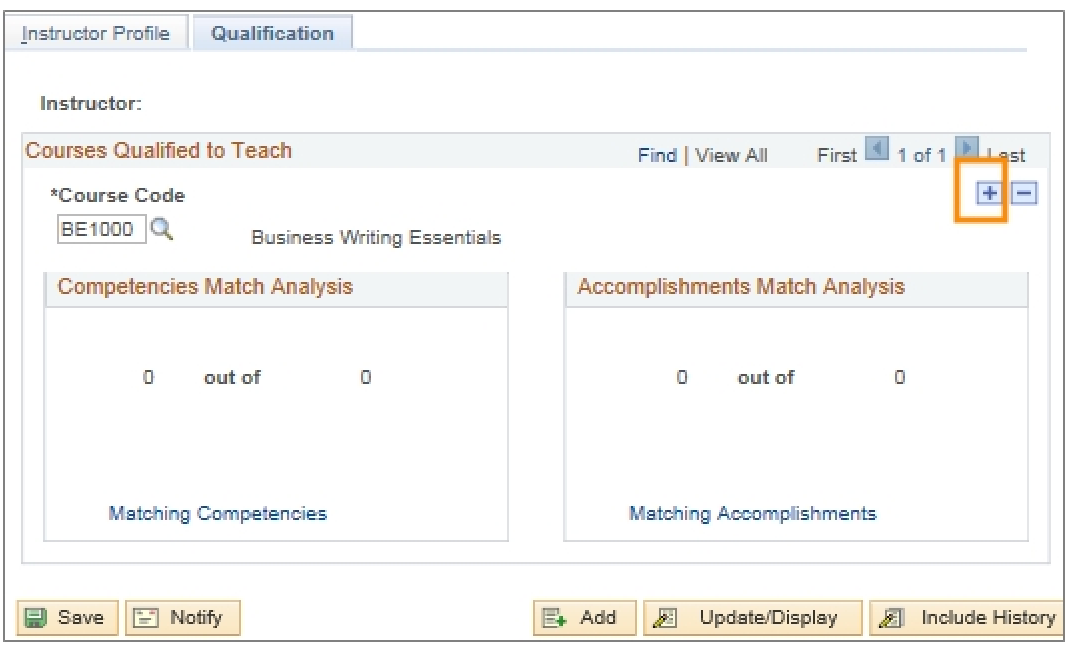
6. Click the **Qualification** tab.

7. To designate the courses this instructor is qualified to teach, complete the field:

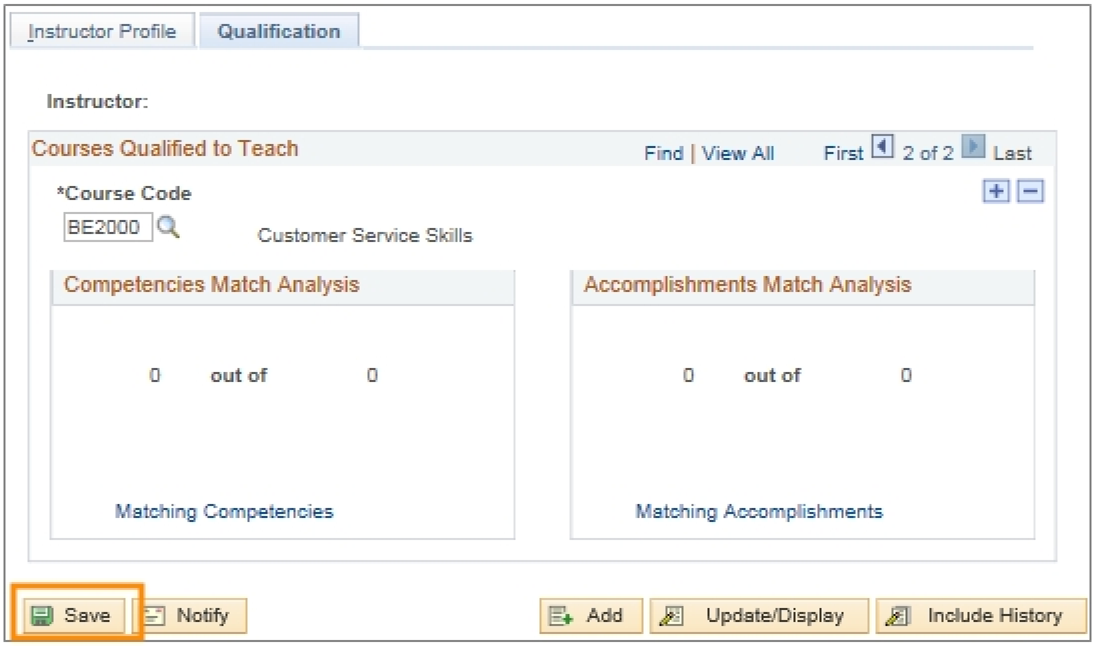
In this field:	Do the following:
Course Code	Look up, or enter, the course code this instructor is qualified to teach.



8. To designate another course the intructor is qualified to teach, click the **Add a New Row** button, then repeat the step above. Otherwise, skip this step.



9. Click the **Save** button.



Result: The system stores the new instructor's profile, and makes this instructor available when you create a new course session.

Create a New Course Session

Overview

Creating a course session is the third step in making an instructional offering available to participants. The course session defines general course attributes, such as the course code, the course content, and how the information is delivered to participants. The course session defines things like the day, time, instructor, and location where the class is offered. If the instructor or the location of the new session is not defined in the system, create their profiles before attempting to creating the session.

Participants do not register to attend courses, they register to attend course sessions. There can and often will be multiple course sessions created for a single course offering.

When the course was created, the maximum and minimum number of participants was defined. This number relates to the ideal number of participants for the class. Creating a new course session also requires a maximum and minimum number of participants. In this context, the maximum and minimum number relate to how many participants the room can comfortably hold, or the number of computers available in the room, and other logistical concerns.

If the minimum number of participants is not reached and the course session is canceled, the system sends an email to each participant and their supervisor, notifying them of this cancellation.

Once the maximum number of participants have enrolled in the class, the system adds subsequent registrants to the wait list. If enrolled participants drop out, the system automatically enrolls people from the wait list, and notifies them that they've been added. A copy of the email is sent to the participants supervisor and the Training and Talent Development department.

Related Reference

- For more information about changing existing course sessions, see Modifying a course session.
- For more information about creating a new training facility, see Creating a New Training Facility.
- For more information about creating an instructor's profile, see Creating an Instructor's Profile.

Creating a New Course Session

Follow these steps to create a new course session:

1. Choose this menu option:

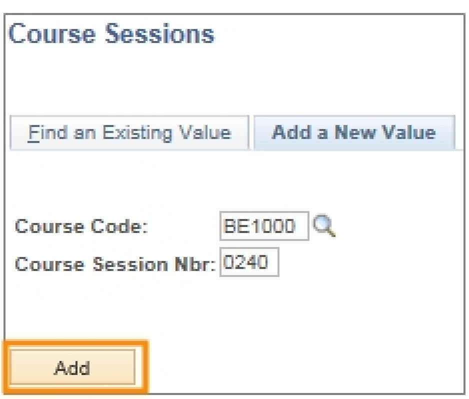
   Main Menu > HR/Payroll Menu > Administer Training > Define Course/Cost Details > Course Sessions

2. Click the **Add a New Value** tab.

3. Complete the fields:

In this field:	Do the following:
Course Code	Look up, or enter, the unique identifier assigned to the course. Note: The code starts with two alpha values followed by four numeric values, and is in this format: AA####.
Course Session Nbr	Enter the number assigned to this session. Note: Course session numbers have four numeric values. It is recommended to start at 0100, and go up in increments of 10. For example, the first session would be 0100, the next 0110, followed by 0120, and so on.

4. Click the **Add** button.



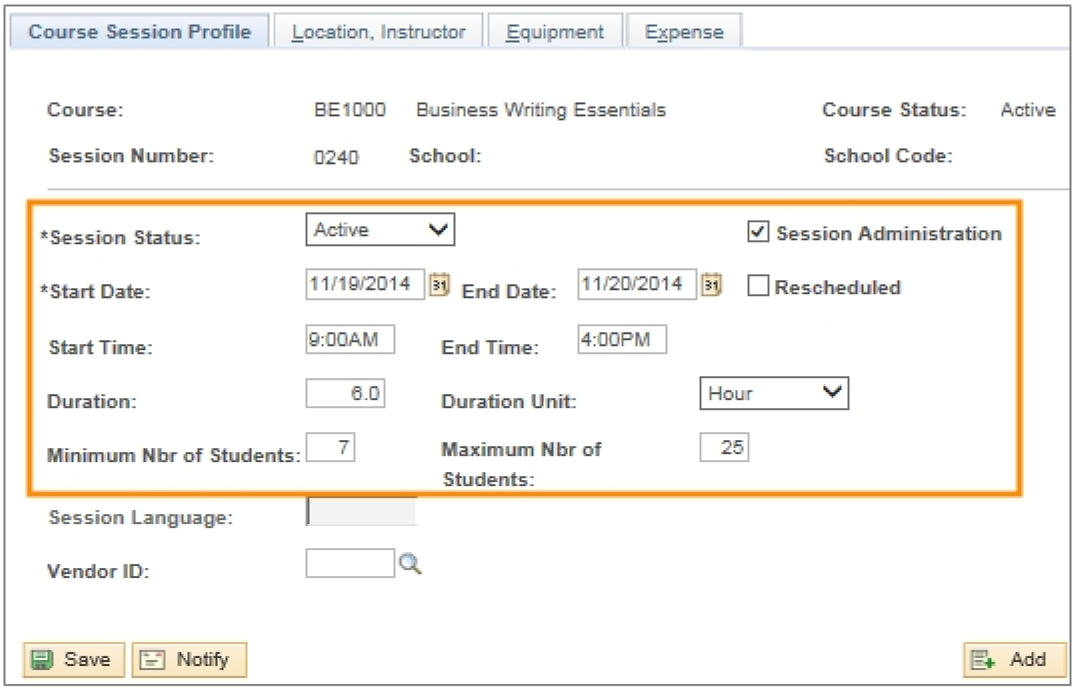
   Result: The system displays the Course Session Profile page.

Course Session Profile Page

5. Complete the fields:

In this field:	Do the following:
Session Status	Always choose **Active**.
Session Administration	Leave the checkbox marked. Caution! Unmarking this checkbox prevents you from creating new sessions of this course.
Start Date	Enter the session's start date. Note: If this session has multiple training days, enter the first training day's date.
End Date	Enter the session's end date. Note: If this session has multiple training days, enter the last training day's date.
Start Time	Enter the time when the course session starts in HH:MMAM format. For course sessions that start at 8 o'clock in the morning, you would enter 8:00AM, and for course sessions that start at Noon, enter 12:00PM. Note: If this session has multiple training days with different starting times, enter the earliest scheduled training start time.
End Time	Enter the time when the course session ends in HH:MMAM format. For course sessions that endat 10 o'clock in the morning, you would enter 10:00AM, and for course sessions that end at Noon, enter 12:00PM. Note: If this session has multiple training days with different ending times, enter the latest scheduled training end time.
Rescheduled	Leave this field blank.
Duration	Enter the total number of hours for the session. Note: If this session has multiple training days, enter the total number of training hours a participant will complete over all the days.
Duration Unit	Leave the default value of Hour.
Minimum Nbr of Students	Enter the minimum number of participants.
Maximum Nbr of Students	Enter the maximum number of participants. Caution! The system will not save the course session if you don't enter a value in the Maximum Nbr of Students field.

In this field:	Do the following:
Session Language	This field is not used at UNC-Chapel Hill.
Vendor ID	Leave this field blank.

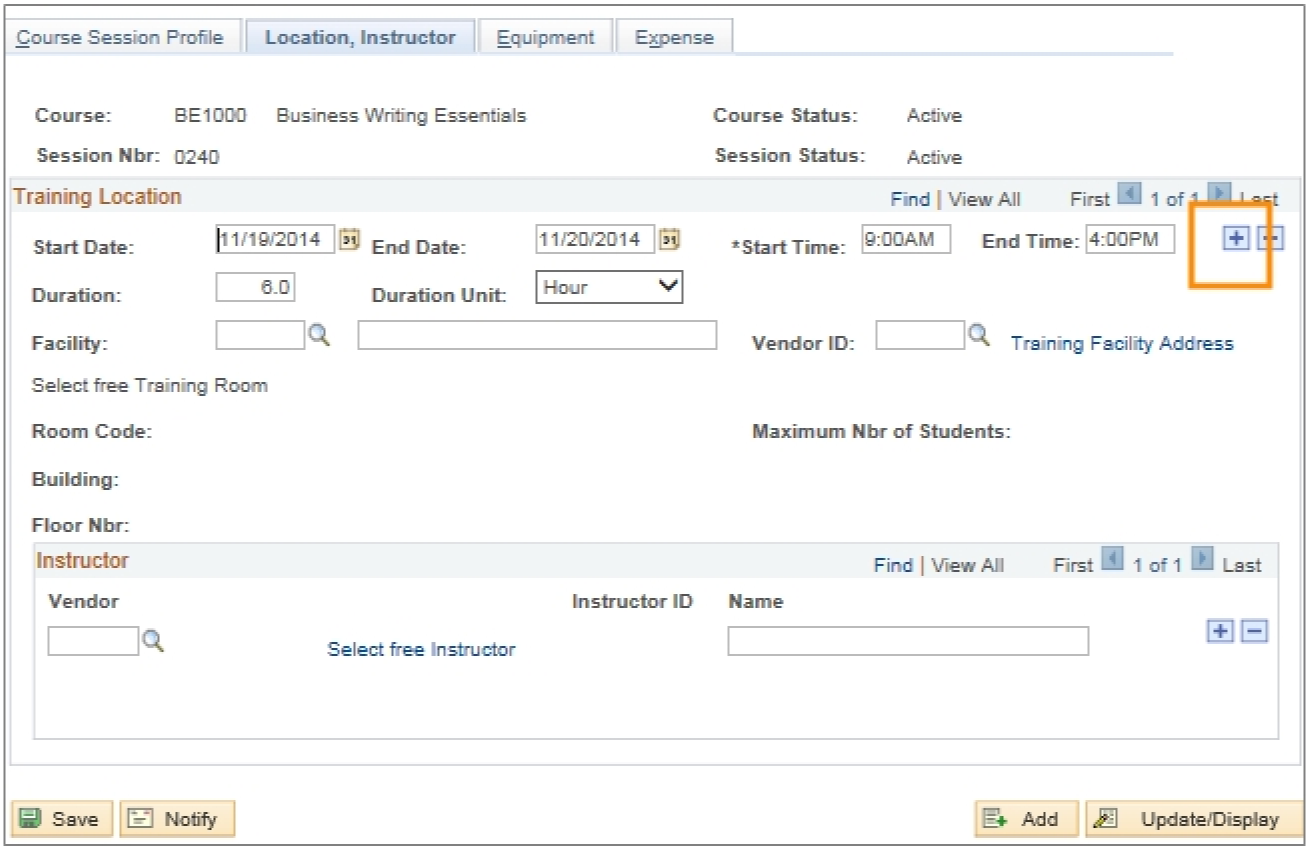


Note: If a course has multiple days, locations, or instructors, the Course Session Profile tab contains a summary of information from those days.

6. Click the **Location, Instructor** tab.

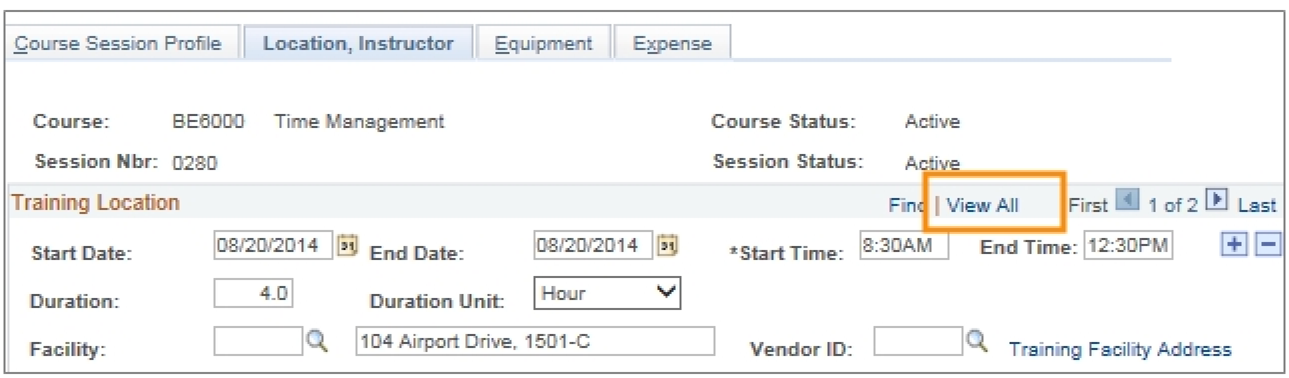
Location, Instructor Tab

7. If the session has multiple days, locations, or instructors, click the **Add a Row button.**



Result: The system will add an additional row providing space to enter specific details about unique portions of a session.

8. Click the **View All** link to display all of the rows created for this session.



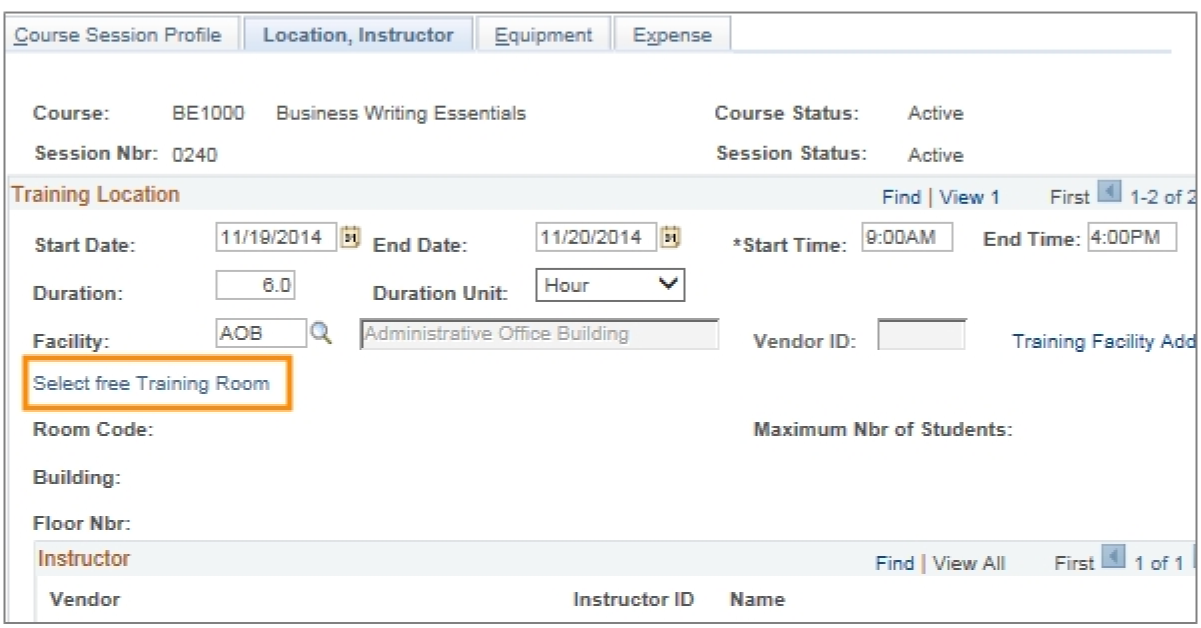
Result: The system displays all of the rows created for this session.

9. Complete the fields for each row.

Note: If your session has multiple training days, the information you enter in these rows pertains to each of the individual portions.

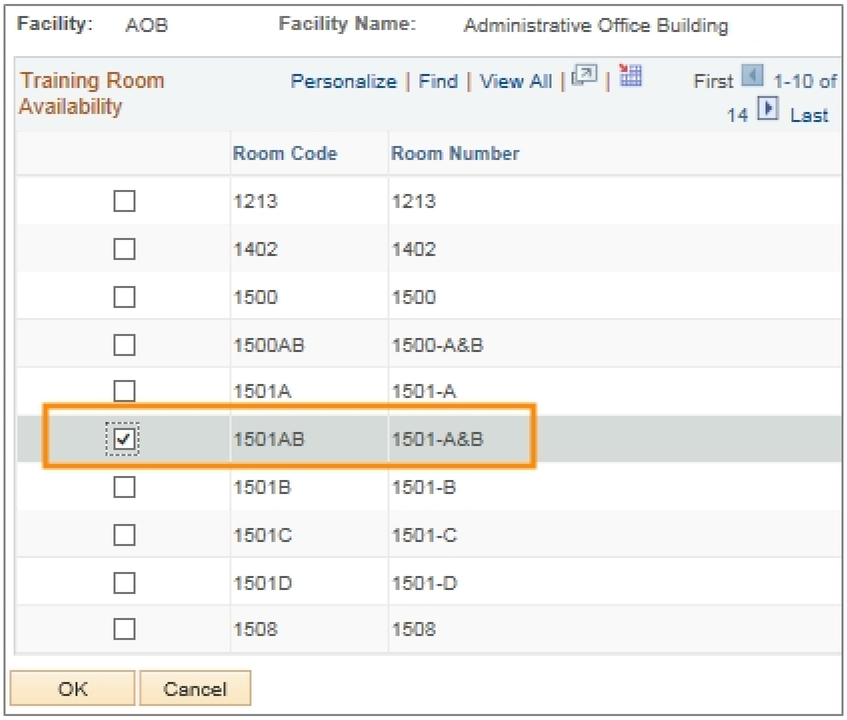
In this field:	Do the following:
Start Date	Enter the date the training will begin.
End Date	Enter the date the training will end. Note: If this session has multiple training days,enter the same date as the Start Date.
Start Time	Enter the start time for this specific training session.
End Time	Enter the end time for this specific training session.
Duration	Leave the default information. The system fills in this field from the information entered on the Course Session Profile tab. Note: If this session has multiple training days, enter how long the training is for each individual day on each row.
Duration Unit	Leave the default value of Hour.
Facility	Look up, or enter, the location for this portion of the course session. Note: If the facility you need is not in the system, you will have to create a new training faciltiy profile in the system before using it in a course session.
Vendor	Leave this field blank.
Instructor ID	Leave this field blank.

10. Click the **Select free Training Room** link.



Result: The system displays a list of available training rooms for the facility.

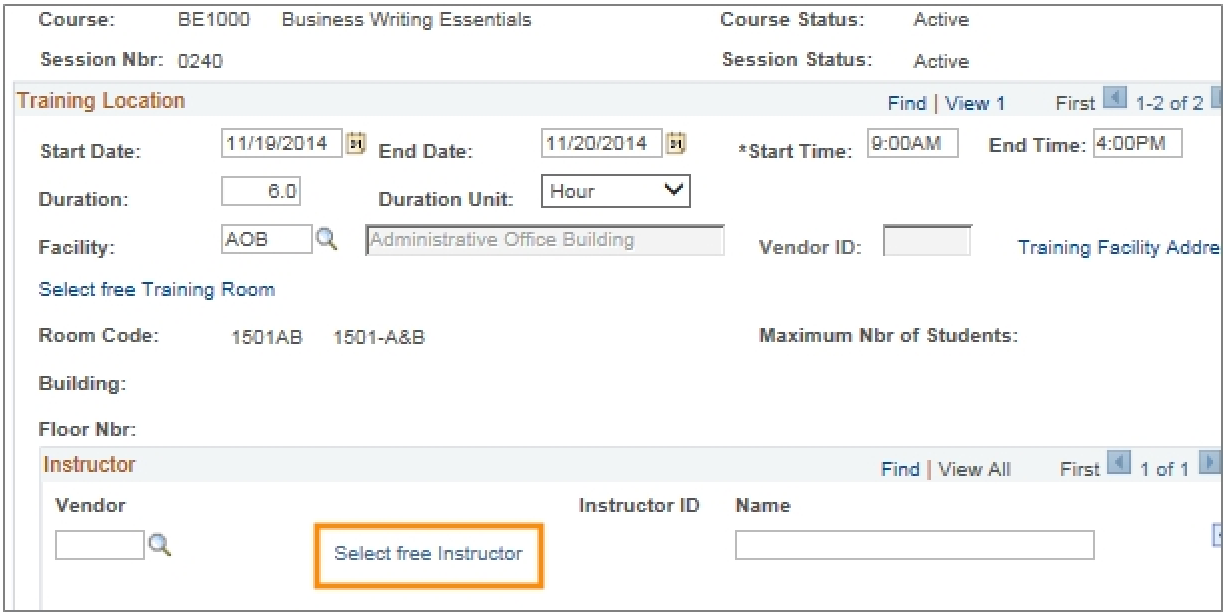
11. Mark the check box to reserve a training room .



12. Click **OK.**

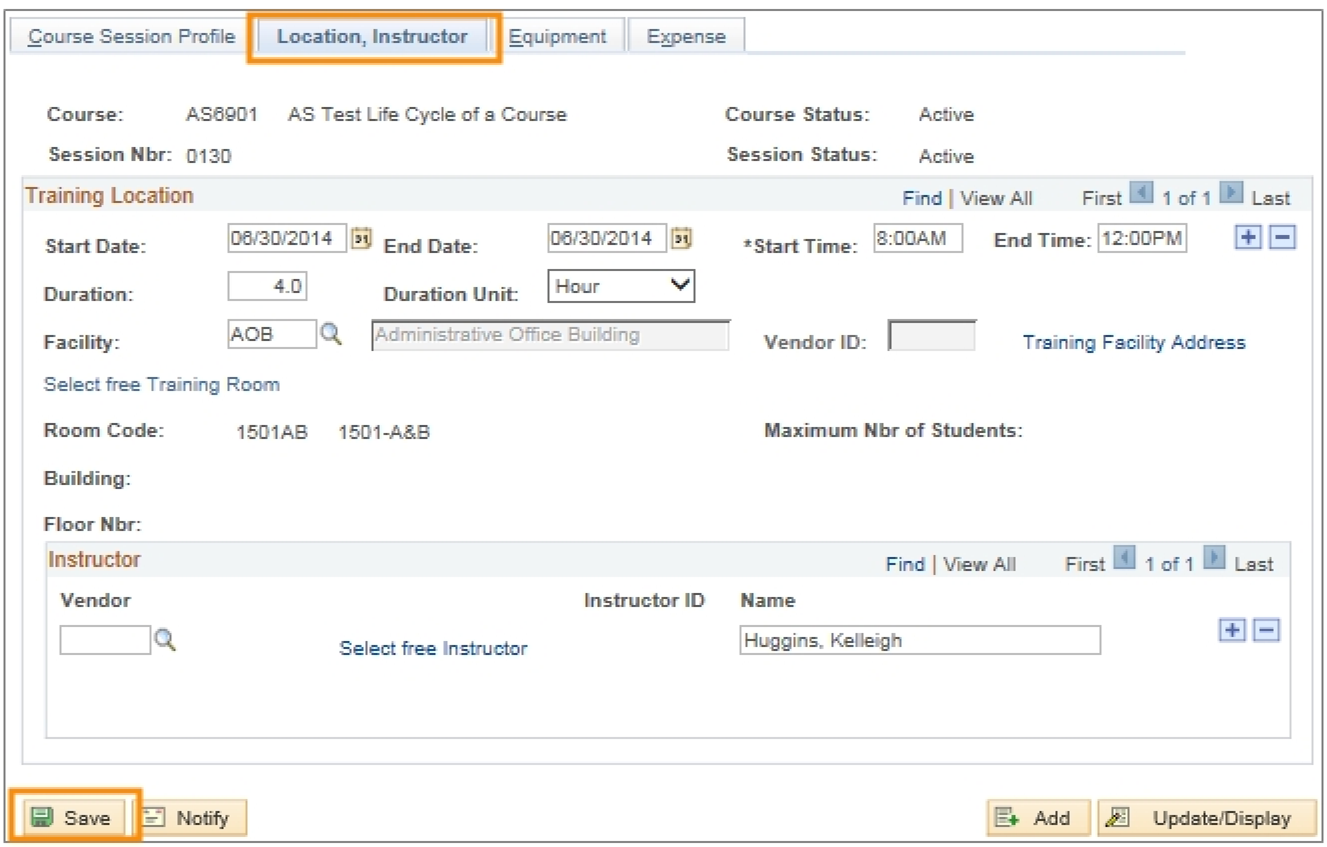
13. Click the **Select free Instructor** link to find an instructor to facilitate this training session.

Note: If the instructor you wish to use is not on the list of instructors, their profile does not exist in ConnectCarolina, or their profile does exist in ConnectCarolina but does not indicate they can teach this class. Set up or correct that instructor's profile, then return to this procedure to choose that instructor for this class.



Result: The system displays a list of instructors whose profiles indicate they can teach this class.

14. Click the **Save** button.



Result: The system saves the new course session information and makes the course session available for participant registration.

Registering a Participant for a Session

Overview

Most of the time, faculty and staff use ConnectCarolina's self service feature to enroll themselves in University-provided classes and training. The system allows registrations until the maximum number of participants is reached. At this point, the system puts the participant on the waiting list. If a registered participant drops out the first person from the waiting list is automatically added.

When special approval is granted, the department delivering the training can manually add additional participants, in lieu of putting them on the waiting list and without affecting the course- or course session-defined maximum number of participants.

Registering a Participant for a Session

Follow these steps to register a participant in a course session:

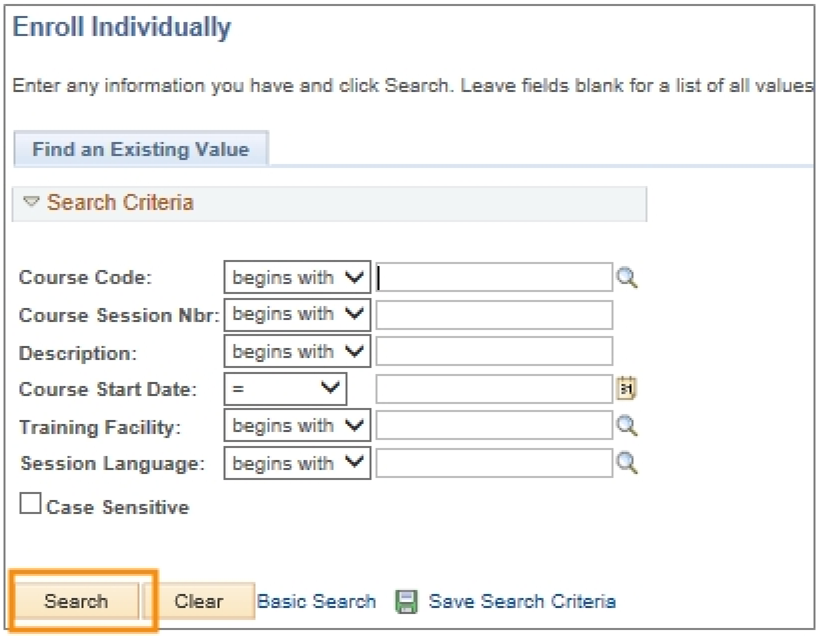
1. Choose this menu option:

   Main Menu > HR/Payroll Menu > Administer Training > Student Enrollment > Enroll Individually

2. Complete as many fields as necessary to refine your search, or leave all the fields blank to see a complete list of courses sessions:

In this field:	**Do the following:**
Course Code	Look up, or enter, the unique code assigned to this course. The code has two alpha and four numeric values, and is in the format AA####.
Course Session Nbr	Enter the unique number assigned to the session. Course session numbers have four numeric characters, start at 0100, and increase in increments of 10. For example, course sessions are numbered 0100, 0110, 0120, and so on.
Description	Enter key words used in the course profile.
Course Start Date:	Enter the start date of the session in MM/DD/YYYY format.
Training Facility	Look up, or enter, the location of the training.
Session Language	Leave this field blank.

3. Click the **Search** button.



Result: The system displays a complete list of course sessions that match the criteria you specified.

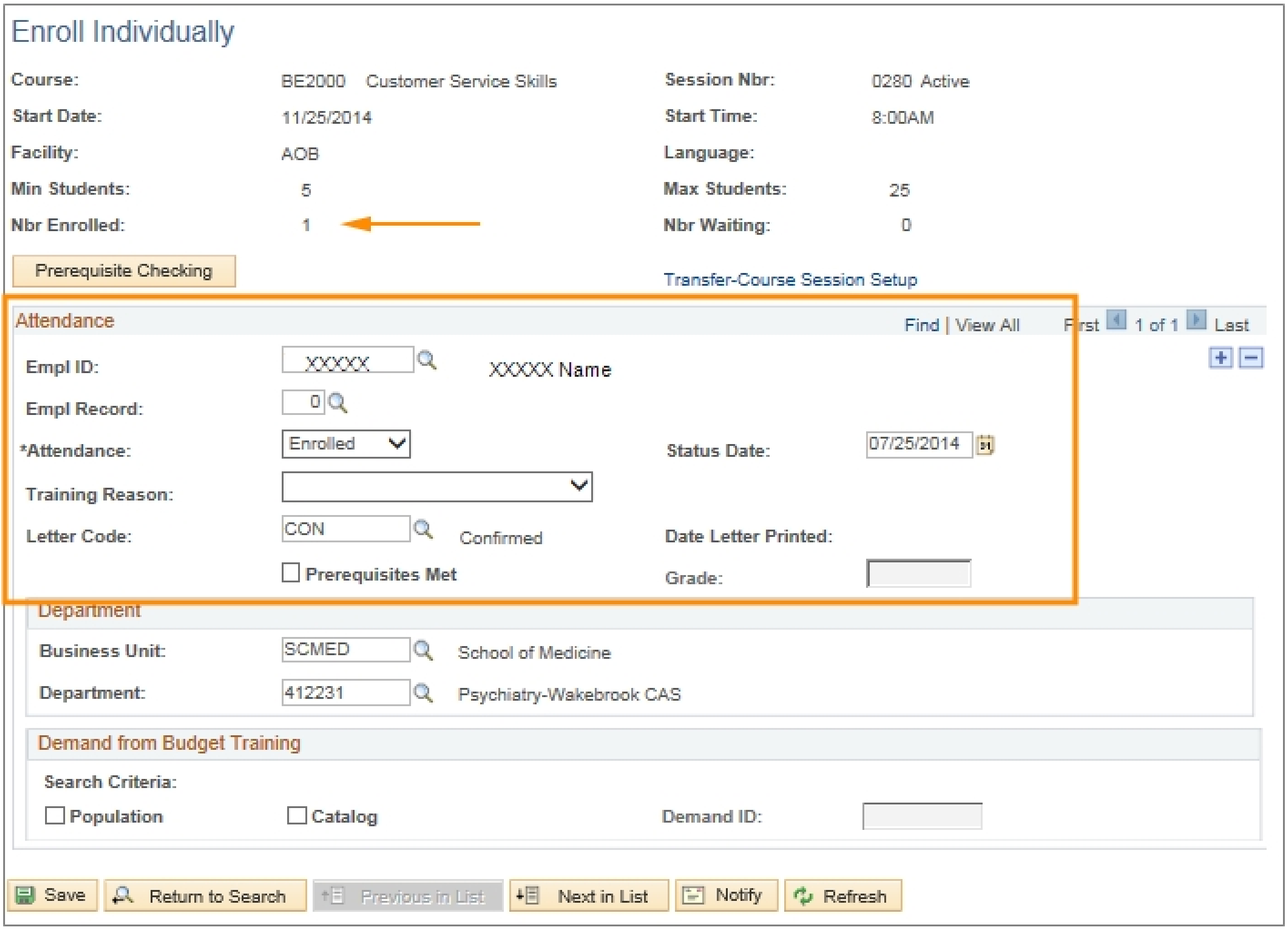
4. Click the course session you need to register the participant in.

Result: The system displays the Enroll Individually page, with information about the class, including the minimum and maximum number of students, and the number of participants currently registered.

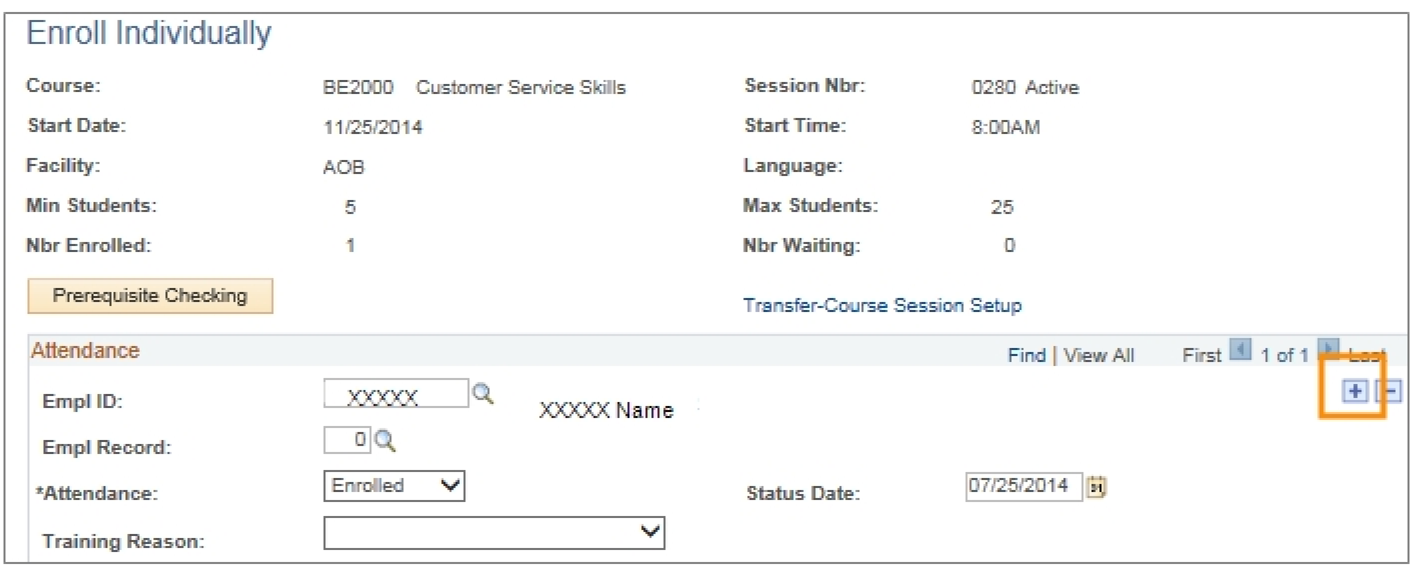
5. Complete the fields:

In this field:	Do the following:
Empl ID	Look up, or enter, the PID for the participant you want to enroll.
Empl Record	Leave the default value of 0.
Attendance	Choose **Enrolled** from the list box.

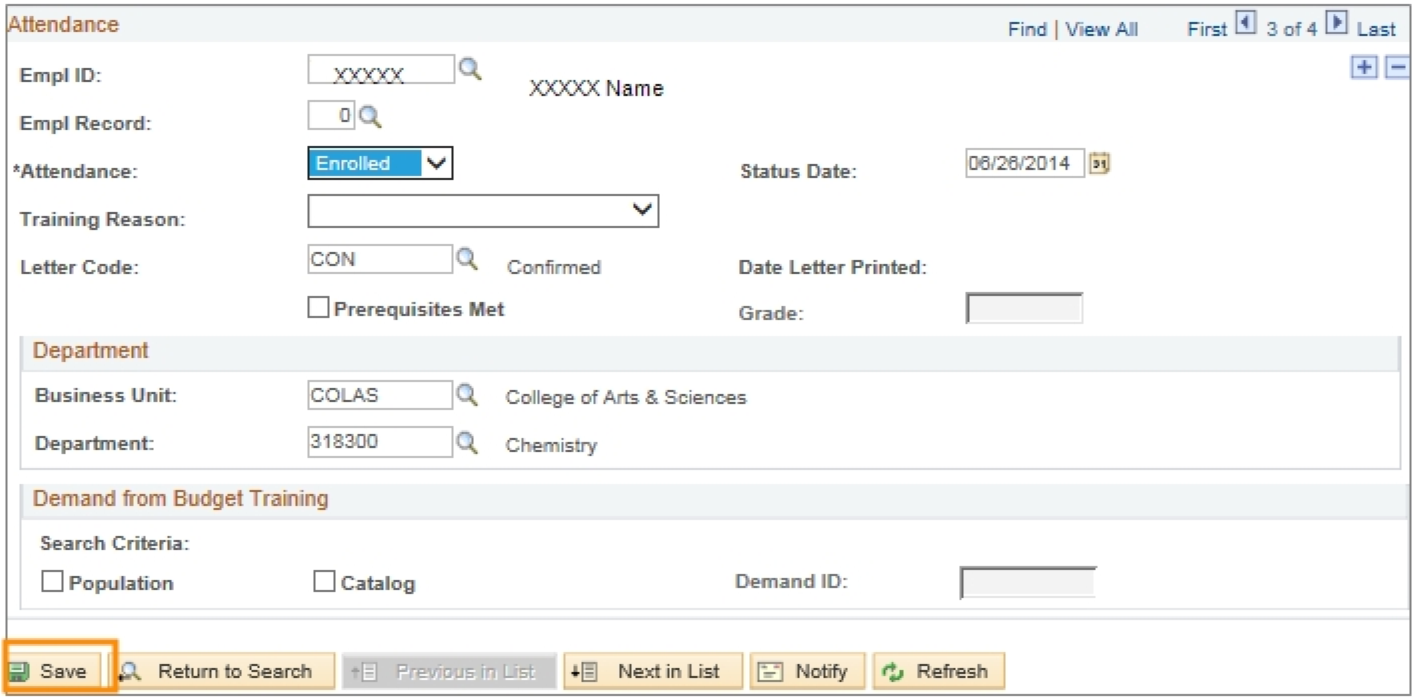
In this field:	Do the following:
Status Date	Leave the default value of today's date.
Training Reason	Leave this field blank.
Letter Code	Leave the default value, which the system fills in when you chose Enrolled in the Attendance field.
Prerequisites Met	Leave this field blank.
Business Unit	Leave the default value in this field. The system uses the participant's PID to fill in this information.
Department	Leave the default value in this field. The system uses the participant's PID to fill in this information.
Search Criteria Population	Leave this field blank.
Search Criteria Catalog	Leave this field blank.
Demand ID	Leave this field blank.



6. If you need to register more than one person for the same class, click the the **Add a New Row** button, then repeat the step above. Otherwise, skip this step.



7. Click the **Save** button.



Result: All of the new participants are registered for the course session. At this time, an email is sent to the participant and their supervisor confirming their registration in the course session.

2 Self Service Learning Management

In this chapter, you will learn how to use Self Service to:

- Register for a course session
- Cancel a course session registration
- View your training summary

Registering for a Course Using Self Service

Overview

Faculty and staff with access to ConnectCarolina can register for classes by using the self service function found on the portal page. A complete list of courses and course sessions is displayed. You can read a description of the class content and view the schedule and availability for each session. Once a user submits a request for registration, they will be automatically enrolled if there is space available or can choose to be waitlisted. Notifications are sent to the participant and the participant's supervisor.

Related Reference

More information about course sessions is available under Canceling a Registration Using Self Service and Training Summary.

Registering for a Course Using Self Service

Follow these steps to register for a course session:

1. Choose this menu option:

   Main Menu> HR/Payroll Menu> Self Service> Learning and Development> Request Training Enrollment

   Result: The system displays the Request Training Enrollment page.

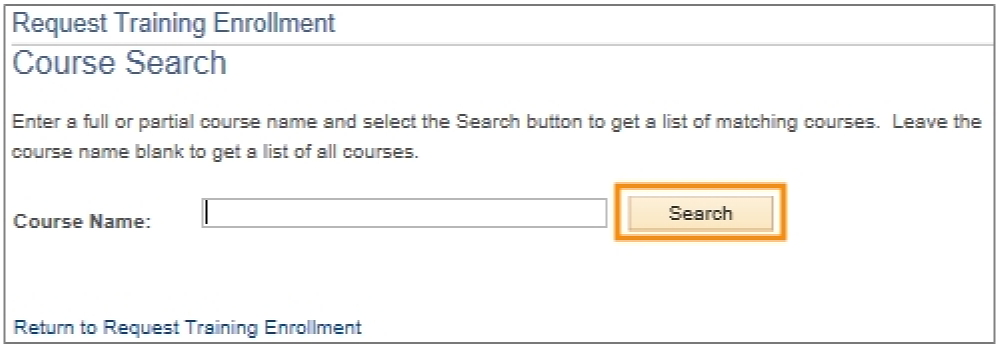
2. Click the **Search by Course Name** link.

   Note: You can also search by Course Number, Location, and Date.

3. Complete the following fields.

In this field:	Do the following:
Course Name	Enter the full or partial course name. Note: You can leave the field blank and get a complete list of courses.

4. Click the **Search** button.

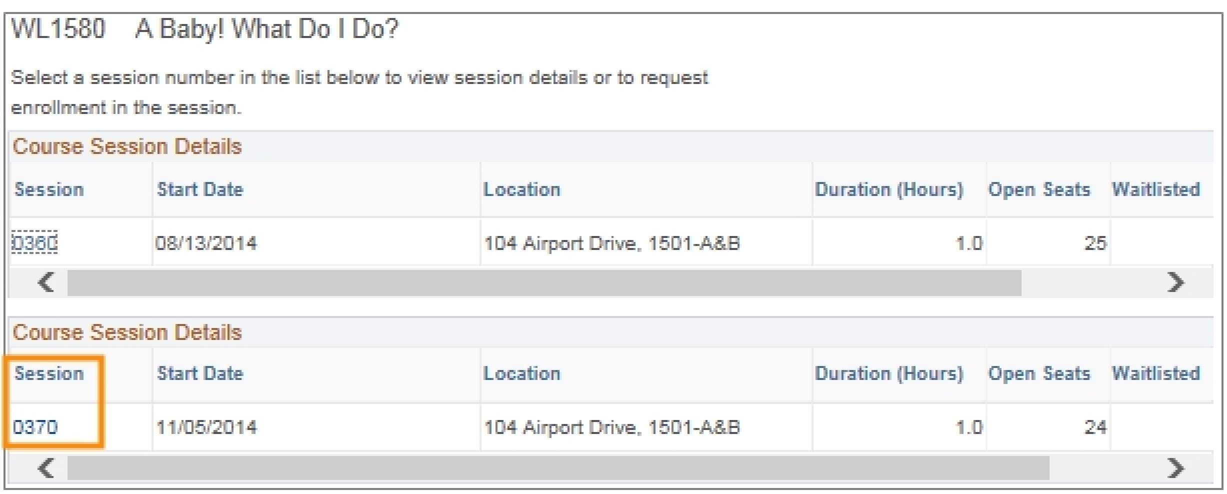


Result: The system displays a complete list of courses.

5. Click the **View Available Sessions** link for the course you would like to enroll in.

Result: The system displays the course session details for the course you selected.

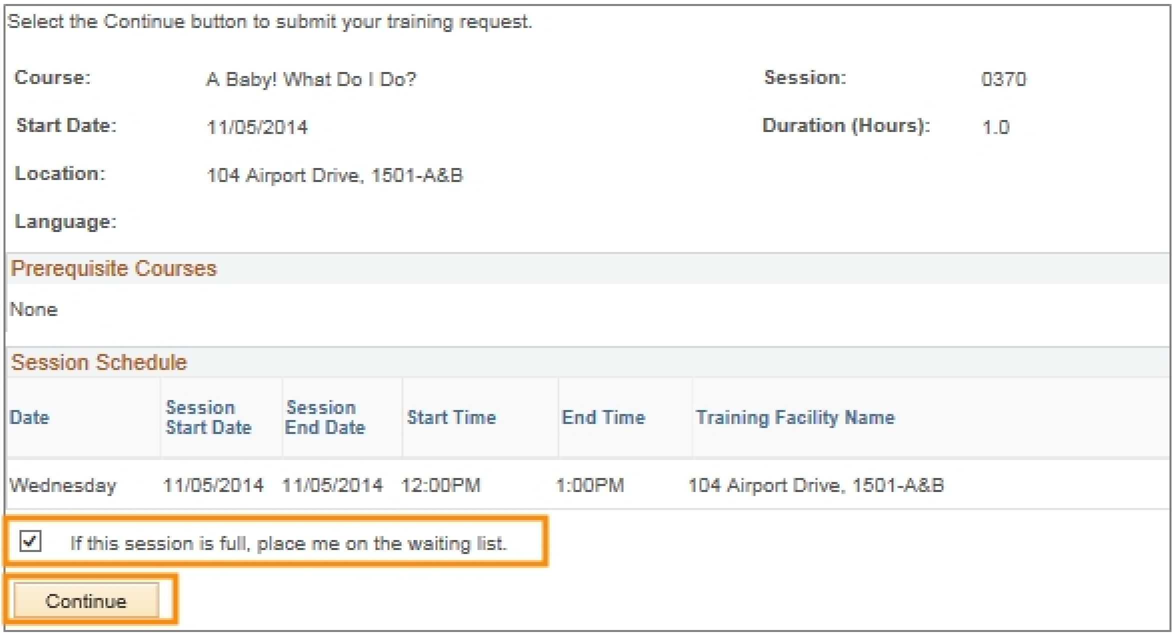
6. Click the **Session** link.



Result: The system displays a detailed page of the session including prerequisite courses and session schedule.

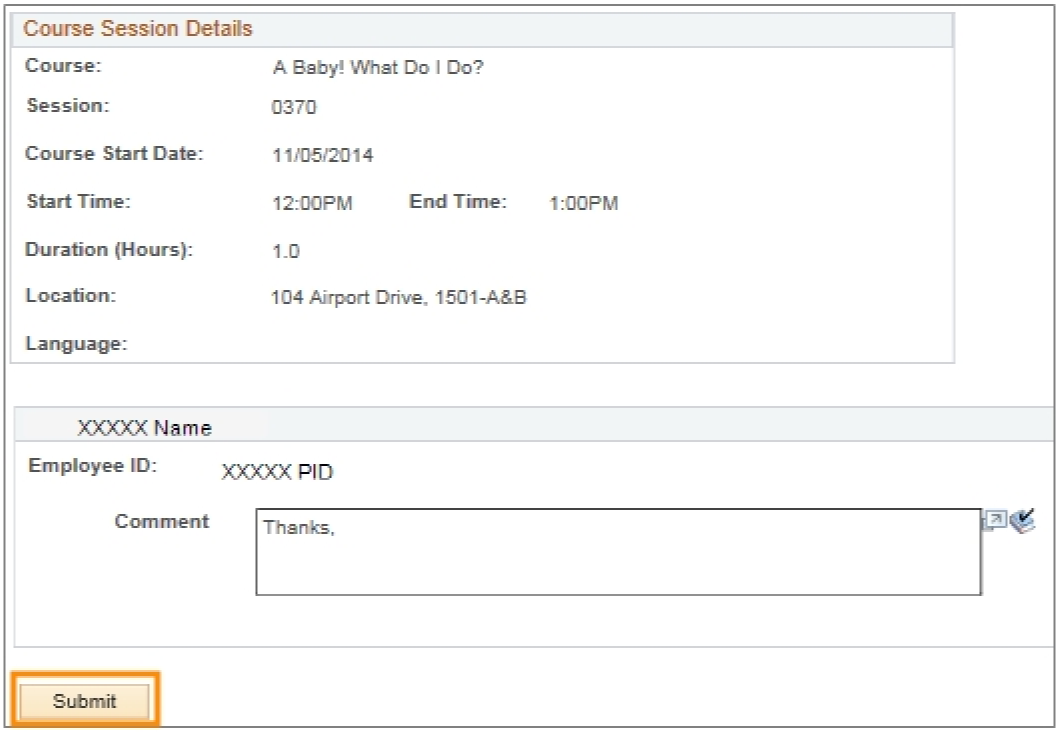
7. Click the **Continue** button to submit your training request for enrollment in this course session.

   Note: By default, the option to place you on the waiting list if this session is full, is selected.



   Result: The system displays a Submit Request page.

8. Click the **Submit** button.



Result: The system indicates that your request was saved. A daily report is sent to the Training and Talent Development mailbox.

9. Click the **OK** button.

Result: The system displays a confirmation of your request.

Canceling a Registration Using Self Service

Overview

Faculty and staff can cancel their registration for classes by using the self service function in ConnectCarolina. If a participant cancels their registration before the scheduled session, the first person on the waitlist will be registered and notifications will be sent to both participants and their supervisors. A canceled registration will not appear on an individuals training summary if submitted before the scheduled session.

Related Reference

More information about course sessions is available under Registering for a Course Using Self Service and Training Summary.

Menu Path

Main Menu> HR/Payroll Menu> Self Service> Learning and Development> Cancel Course Enrollment

Steps - Canceling a Registration Using Self Service

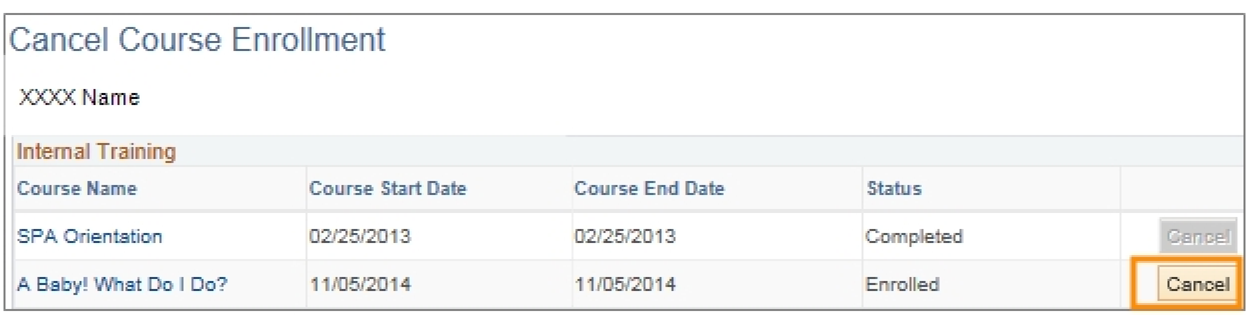
Follow these steps to cancel a registration for a course session:

1. Choose this menu option:

   Main Menu> HR/Payroll Menu> Self Service> Learning and Development> Cancel Course Enrollment

   Result: The system displays a list of your current course enrollments.

2. Click the **Cancel** button next to the appropriate course.



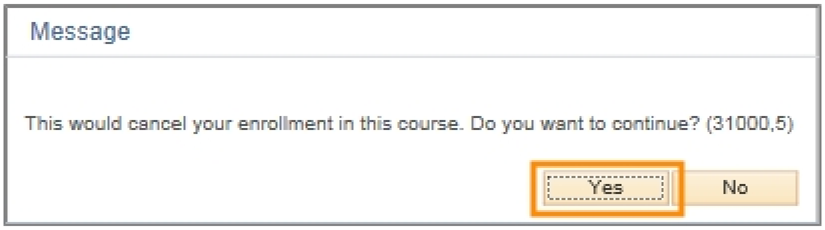
Cancel Course Enrollment

XXXX Name

Internal Training

Course Name	Course Start Date	Course End Date	Status	
SPA Orientation	02/25/2013	02/25/2013	Completed	Cancel
A Baby! What Do I Do?	11/05/2014	11/05/2014	Enrolled	Cancel

3. Click the **Yes** button to in the Message box to confirm cancellation.



Result: The system will display a modified list of your current registrations.

Viewing Your Training Summary Using Self Service

Overview

Participants can view their official training record online through the self service function in ConnectCarolina. A complete list of courses a user has registered for during their employment with UNC is displayed along with the status of each course.

Related Reference

More information about course sessions is available under Registering for a Course Using Self Service and Canceling a Registration Using Self Service.

Menu Path

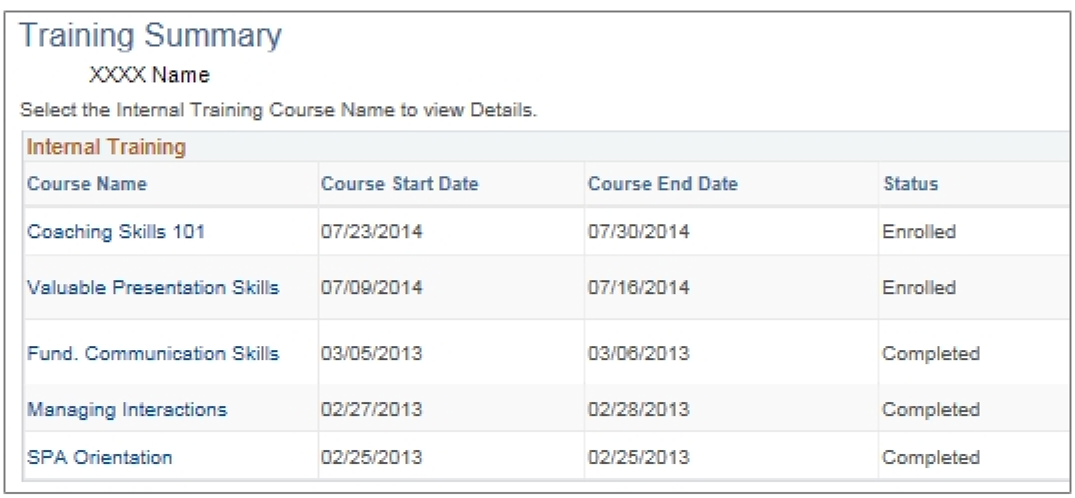
Main Menu> HR/Payroll Menu> Self Service> Learning and Development> Training Summary

Steps - Viewing Your Training Record Using Self Service

Follow these steps to view your training record:

1. Choose this menu option:

   Main Menu> HR/Payroll Menu> Self Service> Learning and Development> Training Summary



Training Summary

XXXX Name

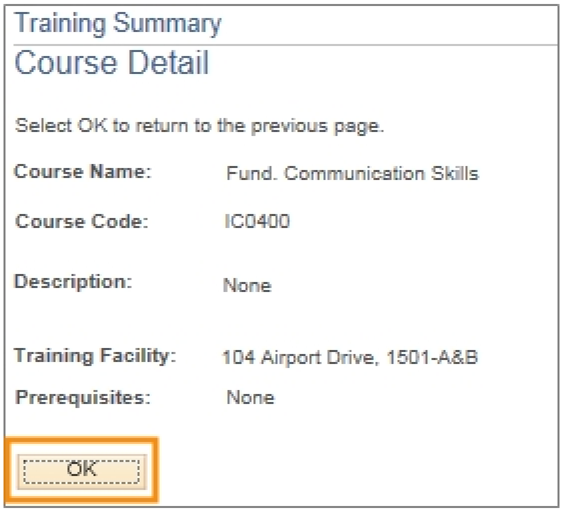
Select the Internal Training Course Name to view Details.

Internal Training

Course Name	Course Start Date	Course End Date	Status
Coaching Skills 101	07/23/2014	07/30/2014	Enrolled
Valuable Presentation Skills	07/09/2014	07/16/2014	Enrolled
Fund. Communication Skills	03/05/2013	03/06/2013	Completed
Managing Interactions	02/27/2013	02/28/2013	Completed
SPA Orientation	02/25/2013	02/25/2013	Completed

   Result: The system displays a list of the training classes you have completed.

2. Click the **Course Name** link to see details about the completed course.



Result: The system displays information about the course.

3. Click the **OK** button to return to Training Summary page.

3 Managing Courses

In this chapter, you will learn how to use Self Service to:

- Review a session summary
- Modify a course session including, updating, cancelling, and closing
- Update a course
- Print a training roster
- Update enrollment

Review Session Summary

Overview

Sometimes you will need to view the participants for a particular course session. Although this is not the roster a trainer will print for class, the review session summary page does provide the names, PIDs, and the status of the people that register for a specific past, present, or future session. The status indicates if a person is currently enrolled or has completed, cancelled, or was a no show for a particular session in the past.

Viewing the Enrollees of a Course Session

Follow these steps to view the enrollees of a course session:

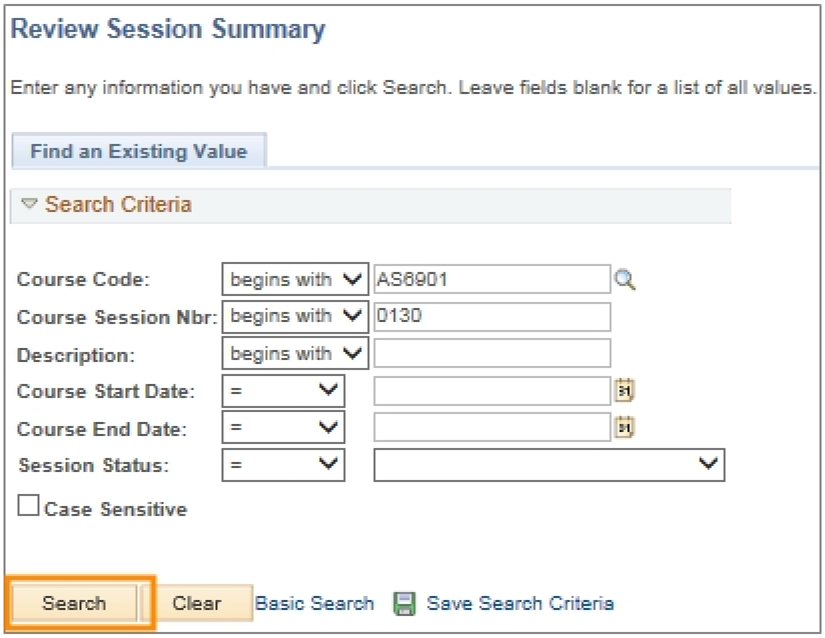
1. Choose this menu option:

   Main Menu > HR/Payroll Menu > Administer Training > Results Tracking > Review Session Summary

2. Complete as many fields as necessary to refine your search or leave all the fields blank to see a complete list of courses sessions.

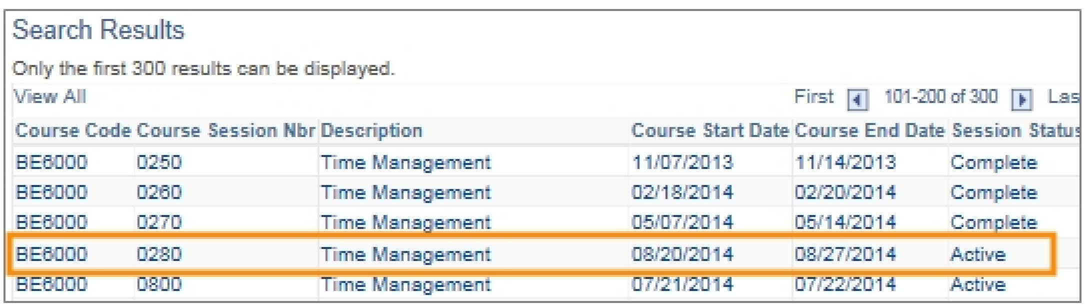
In this field:	**Do the following:**
Course Code	Enter the unique code assigned to this course. The code has two alpha and four numeric characters, for example, AA####.
Course Session Nbr	Enter the four-digit number assigned to this course session.
Description	Enter words used in the course's long title.
Course Start Date:	Enter the session's start date.
Course End Date	Enter the session's end date.
Session Status	Choose one of the following: • **Active** for any future course session • **Canceled** for any session that has been canceled • **Completed** for course sessions that have already taken place

3. Click the **Search** button.



Result: The system displays all a list of course sessions that match the criteria you specified.

4. Click the course link to view a list of enrollees.


Search Results

Only the first 300 results can be displayed.

View All First 101-200 of 300 Las

Course Code	Course Session Nbr	Description	Course Start Date	Course End Date	Session Status
BE6000	0250	Time Management	11/07/2013	11/14/2013	Complete
BE6000	0260	Time Management	02/18/2014	02/20/2014	Complete
BE6000	0270	Time Management	05/07/2014	05/14/2014	Complete
BE6000	0280	Time Management	08/20/2014	08/27/2014	Active
BE6000	0800	Time Management	07/21/2014	07/22/2014	Active

Result: The system displays the list of participants, including their current enrollment status.

Modifying a Course Session

Overview

After courses are created and course sessions are added to the system, information about the session details may change over time and need to be modified. There are three types of modifications:

- **Updates to the session details**. If you modify a session by updating the date, time, or location, the system notifies the registered participants and their supervisors by email. People on the wait list and their supervisors are also notified of the changes.

- **Changing the session status from active to complete**. Closing the session after the training has been completed changes a registered participant's status from enrolled to completed. Please note that attendance needs to be marked before changing a session's status. Any attendance other than complete, such as: No Show or Cancellation, needs to be entered before the status is changed from enrolled to complete.

- **Changing the session status from active to cancelled**. When a course session is cancelled, the system sends an email to the registered and waitlisted participants and their supervisors. The training summary for the registered participants shows that they signed up for the course session and that it was cancelled by the department before the original training session date.

Related Reference

- For information about creating new courses, see Creating a New Course.

- For information about creating a course session, see Create a New Course Session.

Updating Course Session Details

Follow these steps to modify course session details:

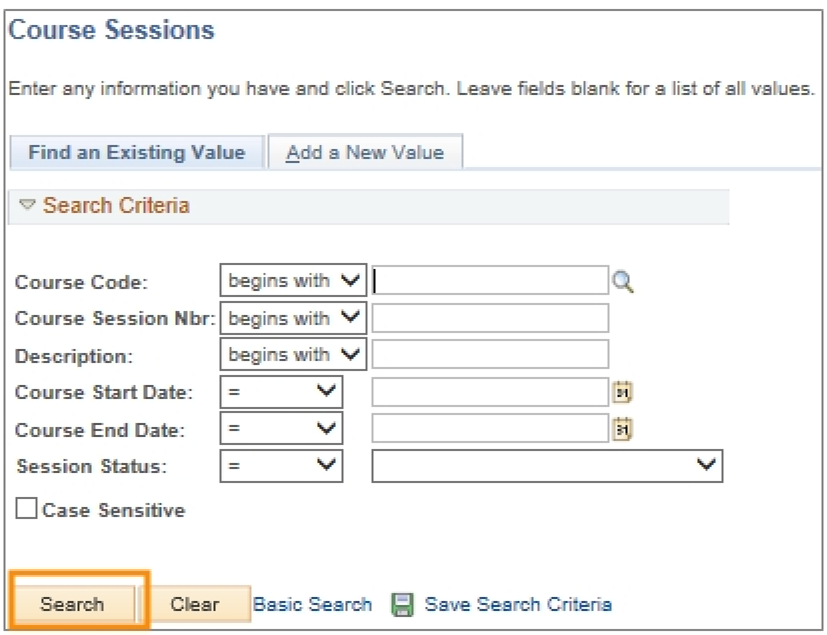
1. Choose this menu option:

   Main Menu > HR/Payroll Menu > Administer Training > Define Course/Cost Details > Course Sessions

2. Complete as many fields as necessary to refine your search, or leave all the fields blank to see a complete list of course sessions:

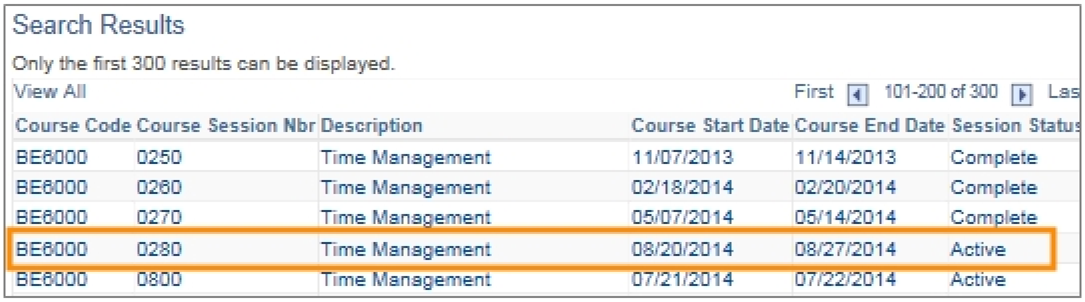
In this field:	Do the following:
Course Code	Enter the unique code assigned to this course. The code has two alpha and four numeric values, in the format AA####.
Course Session Nbr	Enter the four-digit number assigned to this course session.
Description	Enter words used in the course's long title.
Course Start Date:	Enter the session's start date.
Course End Date	Enter the session's end date.
Session Status	Choose one of the following: • **Active** for any future course session • **Canceled** for any session that has been canceled • **Completed** for course sessions that have already taken place

3. Click the **Search** button.



Result: The system displays a list of course sessions that match the criteria you specified.

4. Click the link for the course session you need to modify.



Search Results

Only the first 300 results can be displayed.

View All First 101-200 of 300 Las

Course Code	Course Session Nbr	Description	Course Start Date	Course End Date	Session Status
BE6000	0250	Time Management	11/07/2013	11/14/2013	Complete
BE6000	0260	Time Management	02/18/2014	02/20/2014	Complete
BE6000	0270	Time Management	05/07/2014	05/14/2014	Complete
BE6000	0280	Time Management	08/20/2014	08/27/2014	Active
BE6000	0800	Time Management	07/21/2014	07/22/2014	Active

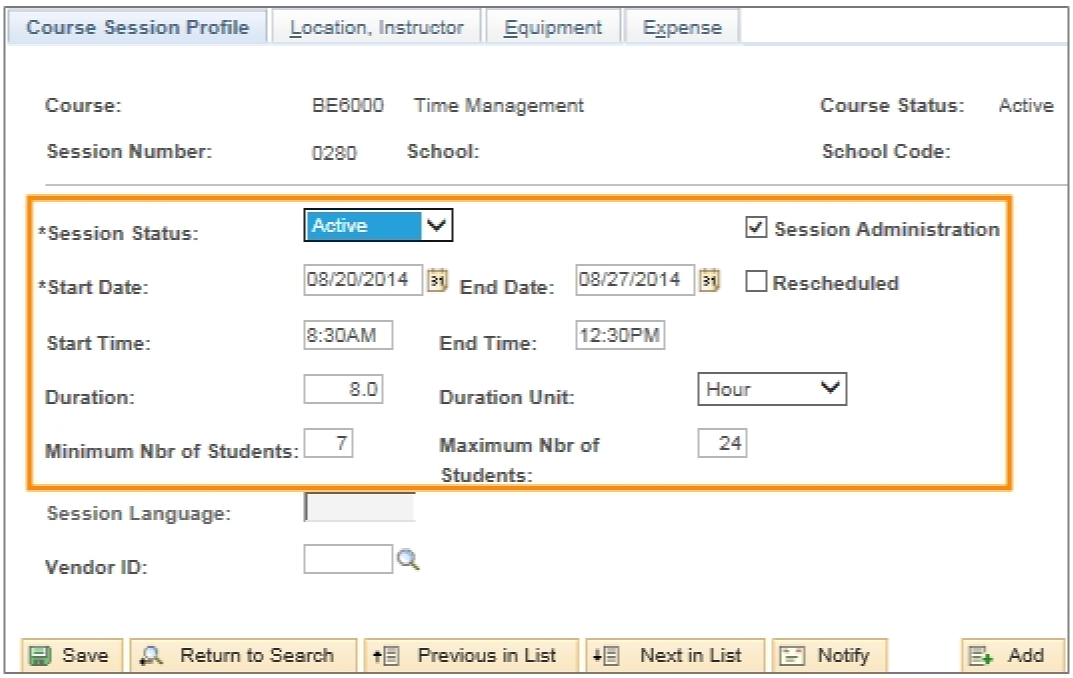
Result: The system displays the Course Session Profile tab.

Course Session Profile Tab

5. The system fills in the fields with information from when the course session was originally created. Modify the fields as necessary.

In this field:	Do the following:
Session Status	Choose one of the following: • **Active** for any existing, future course session • **Canceled** for any session that has been canceled • **Completed** for course sessions that have already taken place
Session Administration	Leave the checkbox marked. Caution! Unmarking this checkbox prevents you from creating new sessions of this course.
Start Date	Change the session's start date.
End Date	Change the session's end date.
Start Time	Enter the course session's changed start time, in HH:MM AM/PM format. For course sessions that start at 8 o'clock in the morning, you would enter 8:00AM, and for course sessions that start at Noon, enter 12:00PM.
End Time	Enter the course session's changed end time, in HH:MM AM/PM format. For course sessions that end at Noon, enter 12:00PM, and for course sessions that end at 4 o'clock in the afternoon, enter 4:00PM.
Rescheduled	Mark this checkbox if you want to send an email to enrollees, notifying them of the update you are making. Note: If you need to reschedule a session that you previoulsy rescheduled and want notifications sent, you need to uncheck the box, save the record, make the rescheduled changes, recheck the box, and save again.
Duration	Change the total number of hours for the session.

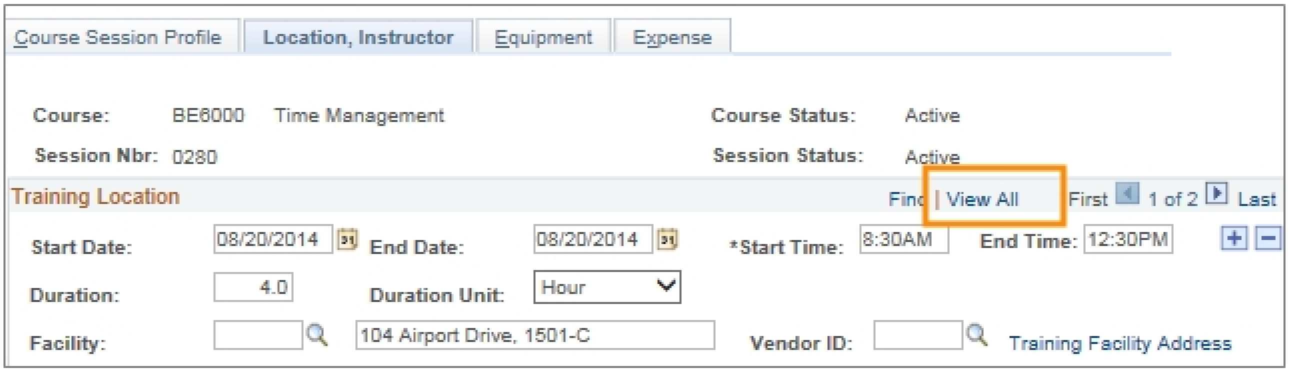
In this field:	Do the following:
Duration Unit	Use the default value of Hour.
Minimum Nbr of Students	Change the minimum number of participants.
Maximum Nbr of Students	Change the maximum number of participants. Note: As space becomes available, the first person on the waitlist will be registered. At this time, notifications are sent to the participant, their supervisor, and the Training and Talent Development department.
Student Language	UNC-Chapel Hill is not using this field.
Vendor ID	Leave this field blank.



6. Click the **Location, Instructor** tab.

Location, Instructor Tab

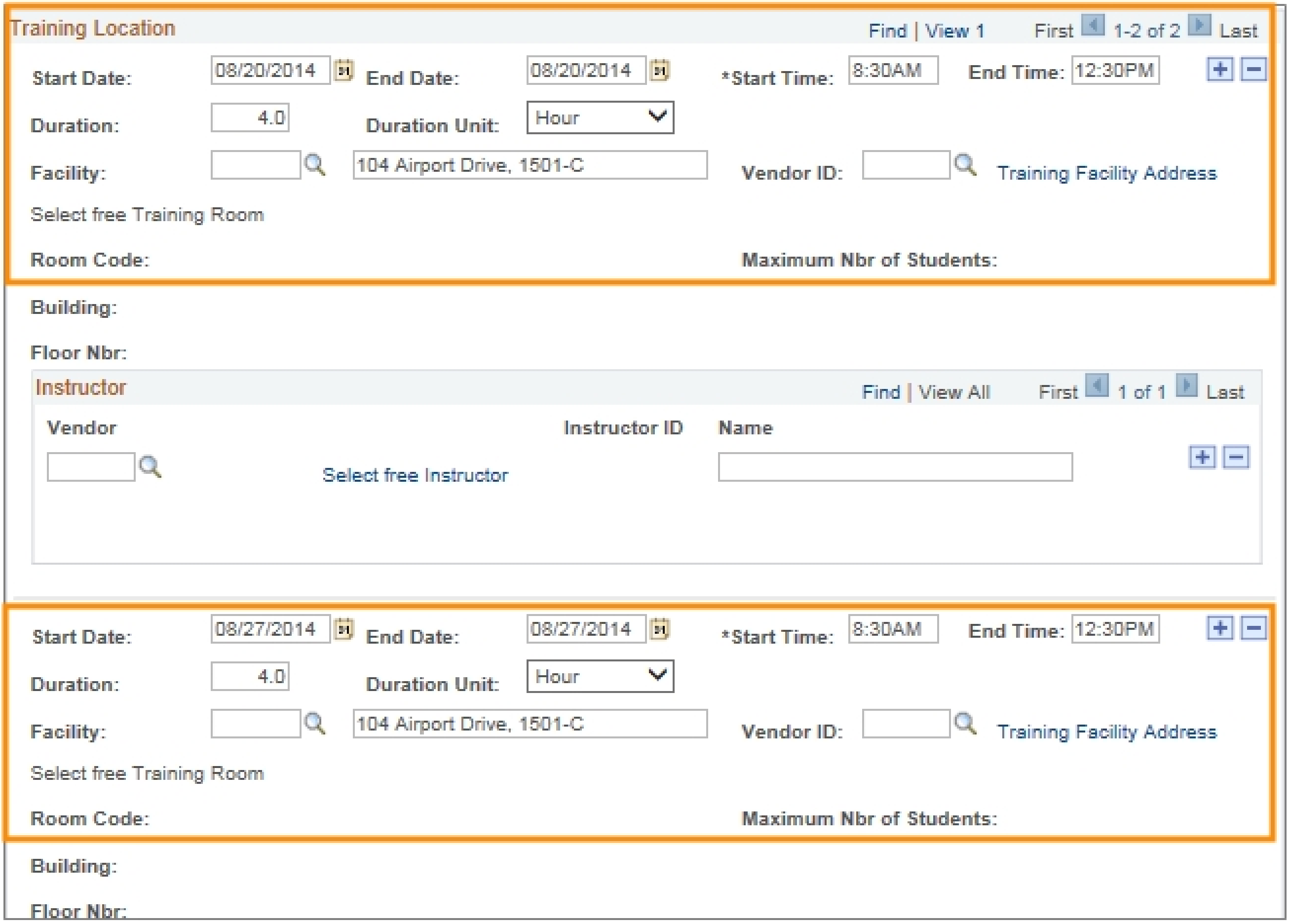
7. If the session was created with multiple days, locations, or instructors, click the **View All** link to display all of the rows created for this session.



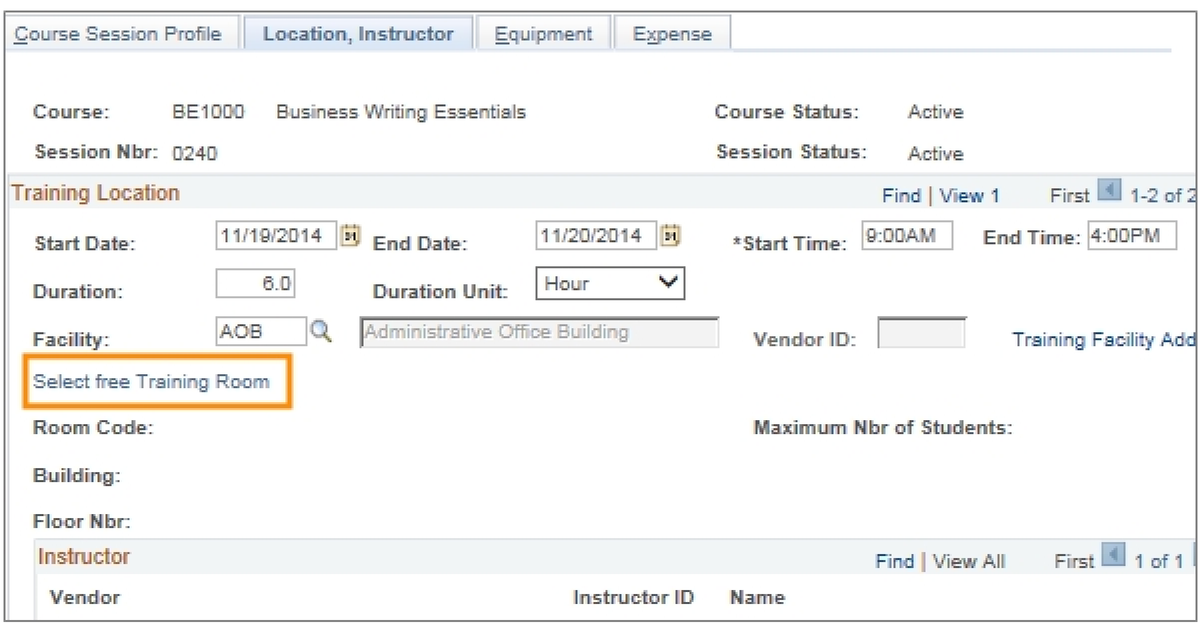
Result: The system displays all of the rows created for this session.

8. Modify the fields for each row as necessary:

In this field:	**Do the following:**
Start Date	Enter the date the training begins.
End Date	Enter the date the training ends. Note: If this session has multiple training days, enter the same date as the Start Date. The information in this row only pertains to the first day of training.
Start Time	Enter the start time for this specific training session.
End Time	Enter the end time for this specific training session.
Duration	Change or use the default value. The system fills in this field with the information entered in the Course Session Profile tab. Note: If this session has multiple training days, enter how long the training is for each individual day on each row.
Duration Unit	Leave the default value of Hour.
Facility	Look up, or change, the location for this specific training course session.
Vendor	Leave this field blank.
Instructor ID	Leave this field blank.

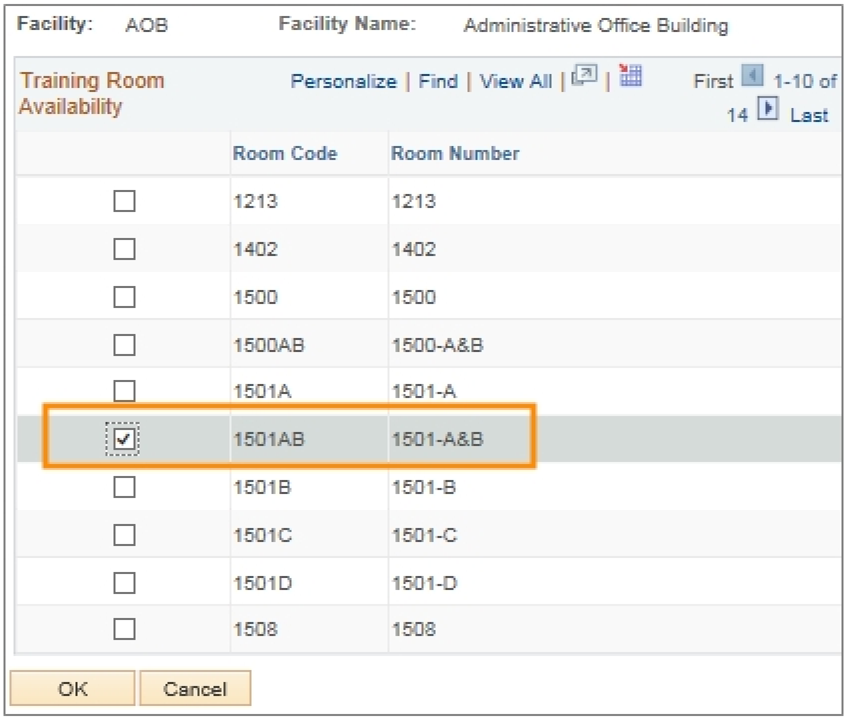


9. Click the **Select free Training Room** link if you need to modify the room being used at the facility.



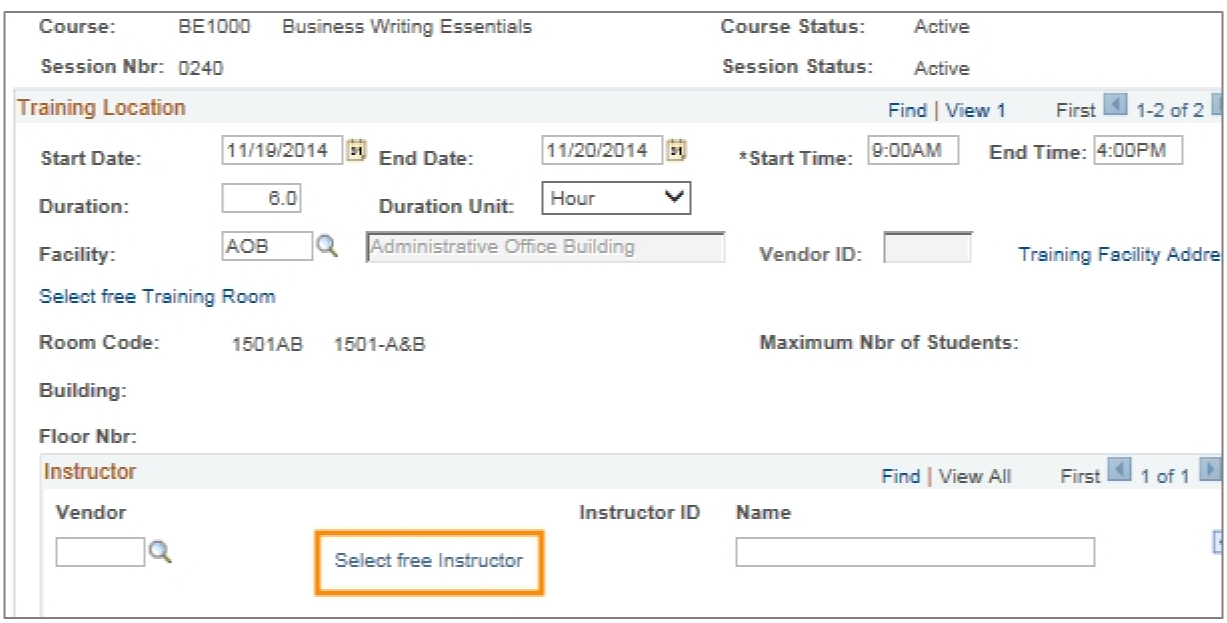
Result: The system displays a list of available training rooms for the selected facility.

10. Mark the checkbox next to the training room number to change the training location.



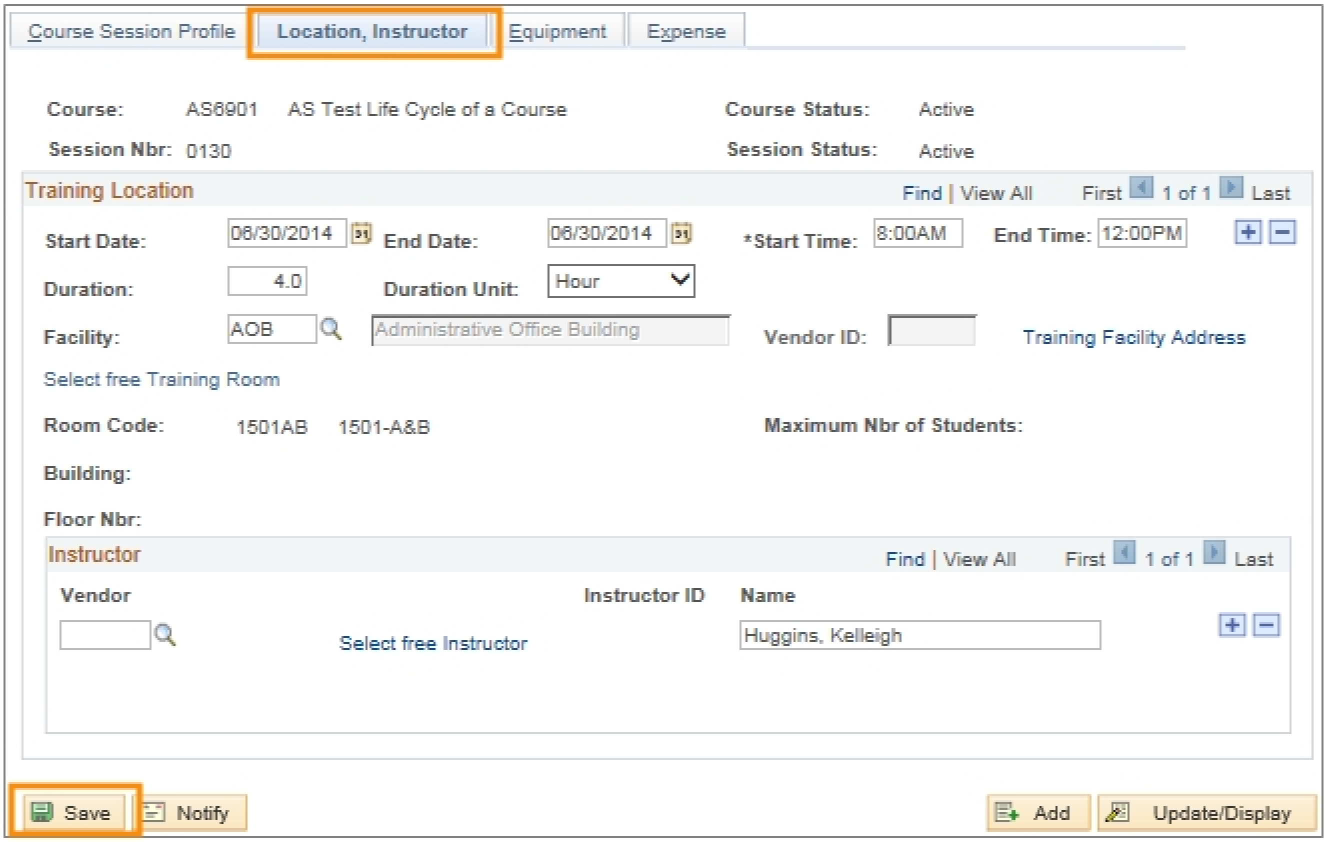
11. Click **OK.**

12. Click the **Select free Instructor** link to change the instructor for this training session.



Result: The system displays a list of internal instructors that have an established profile in ConnectCarolina.

13. Click the **Save** button.



Result: The system saves the course session updates.

Closing a Course Session

Follow these steps to close a course session and change the registered participants' status from enrolled to completed:

Related Reference

- More information on updating course session attendance/ enrollment see Update Enrollment

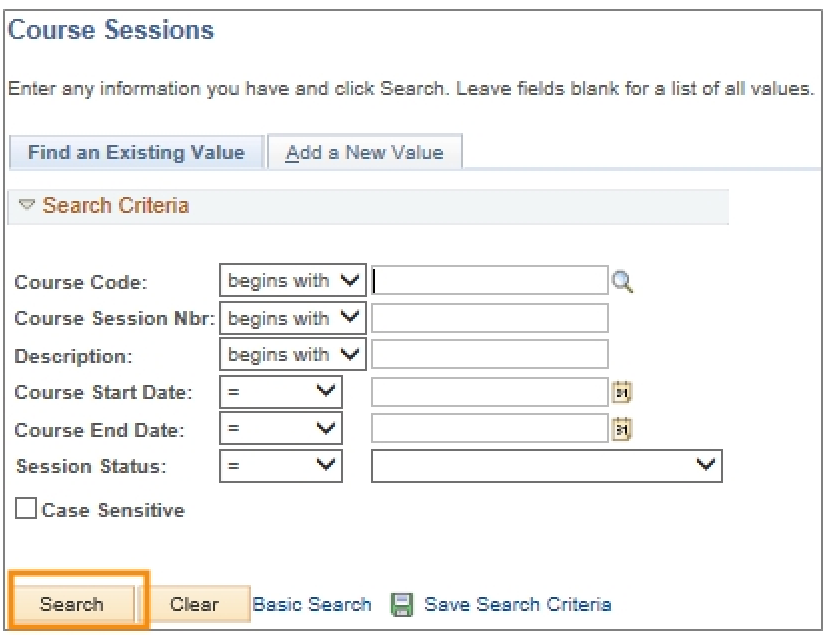
1. Choose this menu option:

   Main Menu > HR/Payroll Menu > Administer Training > Define Course/Cost Details > Course Sessions

2. Complete as many fields as necessary to refine your search.

In this field:	**Do the following:**
Course Code	Enter the unique code assigned to this course. The code has two alpha and four numeric values, in the format AA####.
Course Session Nbr	Enter the four-digit number assigned to this course session.
Description	Enter words used in the course's long title.
Course Start Date:	Enter the session's start date.
Course End Date	Enter the session's end date.
Session Status	Choose one of the following: • **Active** for any future course session • **Canceled** for any session that has been canceled • **Completed** for course sessions that have already taken place

3. Click the **Search** button.

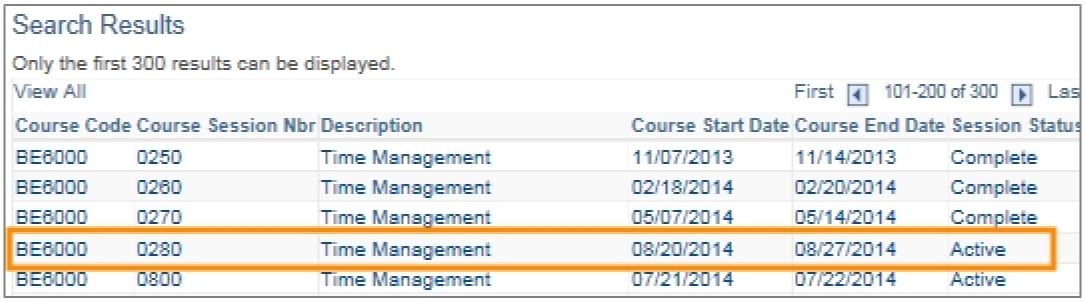


Result: The system displays a list of course sessions that match the criteria you specified.

4. Click the link for the course session you need to close.

•

Note: Mark the attendance for the training class before closing the course session.



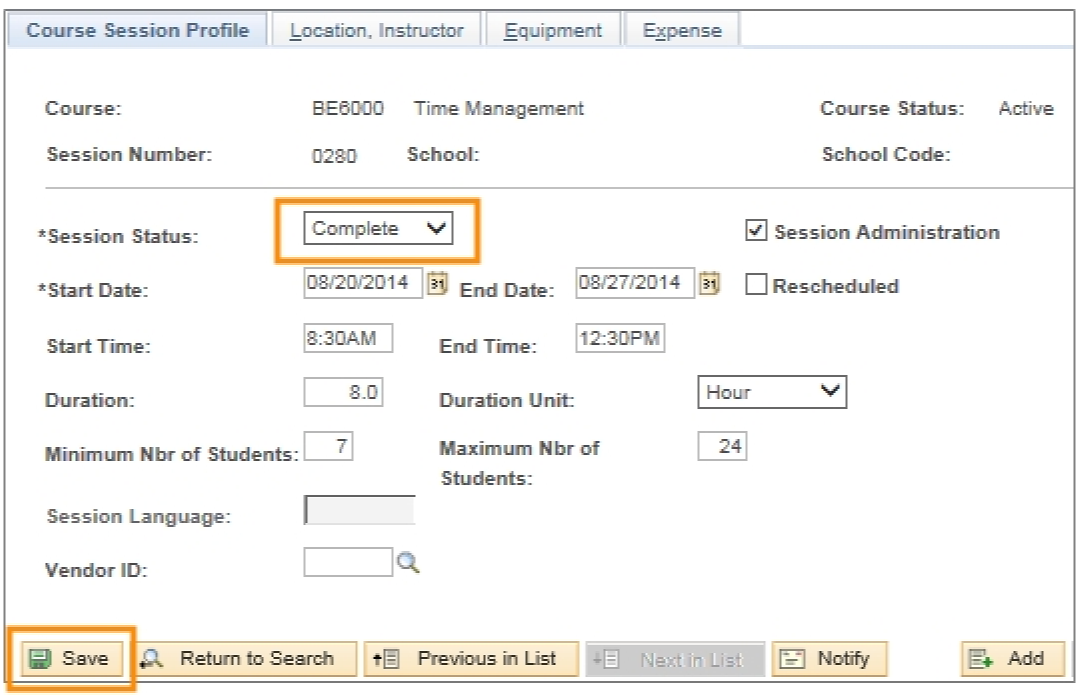
Result: The system displays the Course Session Profile tab.

Course Session Profile Tab

2. Modify the following field.

In this field:	Do the following:
Session Status	Choose **Complete**.

3. Click the **Save** button.



Result: The system changes the registered participants' status from enrolled to completed and updates their training summaries.

Cancelling a Course Session

Follow these steps to cancel a course session:

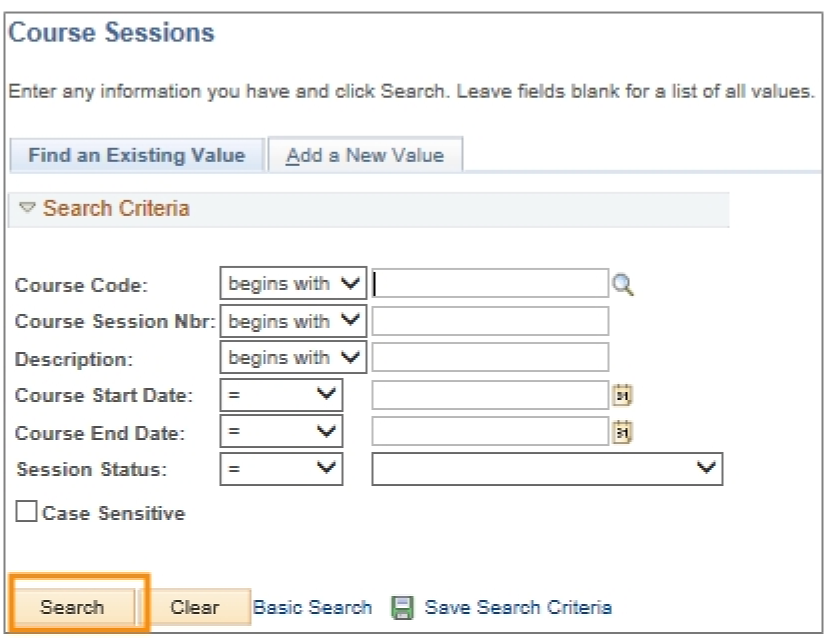
1. Choose this menu option:

   Main Menu > HR/Payroll Menu > Administer Training > Define Course/Cost Details > Course Sessions

2. Complete as many fields as necessary to refine your search.

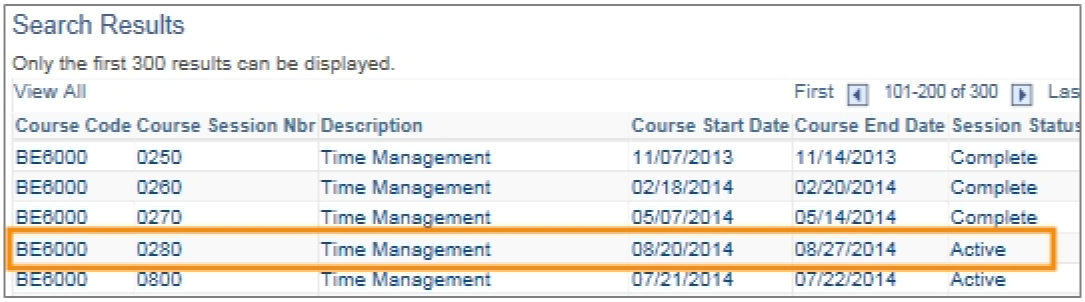
In this field:	Do the following:
Course Code	Enter the unique code assigned to this course. The code has two alpha and four numeric values, in the format AA####.
Course Session Nbr	Enter the four-digit number assigned to this course session.
Description	Enter words used in the course's long title.
Course Start Date:	Enter the session's start date.
Course End Date	Enter the session's end date.
Session Status	Choose one of the following: • **Active** for any future course session • **Canceled** for any session that has been canceled • **Completed** for course sessions that have already taken place

3. Click the **Search** button.



Result: The system displays a list of course sessions that match the criteria you specified.

4. Click the link for the course session you need to cancel.



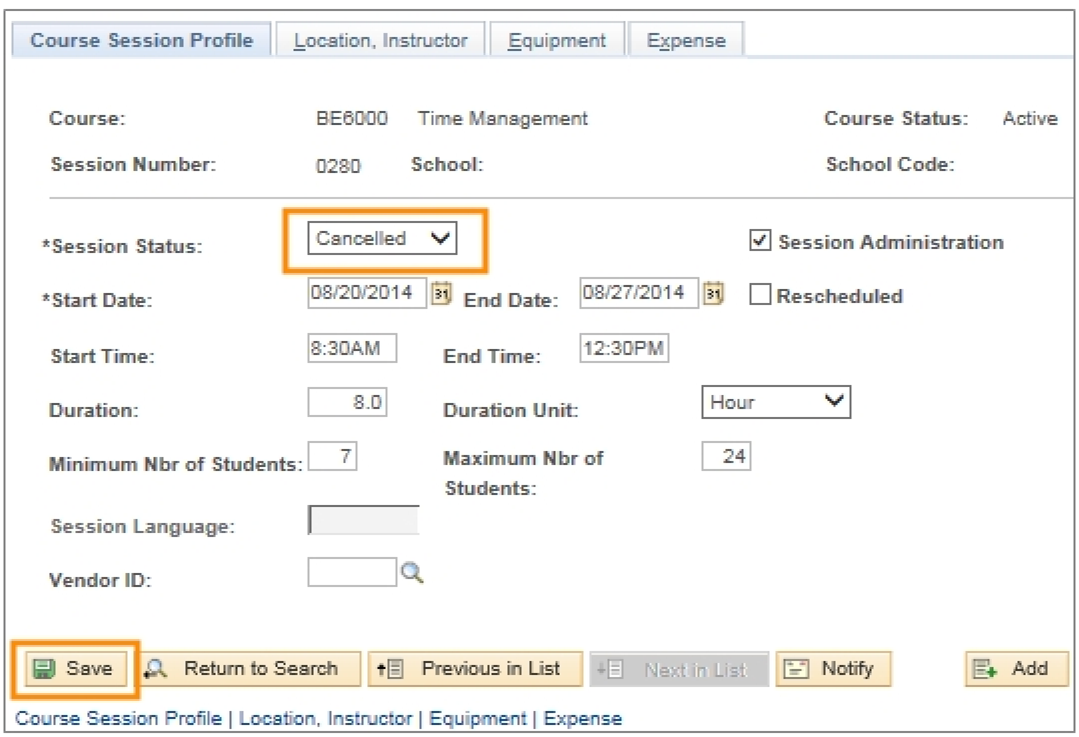
Result: The system displays the Course Session Profile tab.

Course Session Profile Tab

5. Modify the field:

In this field:	Do the following:
Session Status	Choose **Cancelled**.

6. Click the **Save** button.



Result: The registered participants' training summaries will indicate their initial registration and the session's cancellation.

Updating a Course

Overview

Sometimes after courses are created and course sessions are added to the system, details change and the system needs to be updated. These changes could include basic course attributes, including prerequisite courses, how the information is delivered to participants, or the duration and course credits.

You can update course details whether or not a course session has been created, cancelled, or completed for the course. Once the change has been made, the system automatically updates the training records for participants who have already participated in a course session of this course.

Related Reference

- For information about creating a course, see Creating a New Course.
- For information about creating a course session, see Create a New Course Session.
- For information about modifying a course session, see Modifying a course session.

Updating a Course

Follow these steps to update a course:

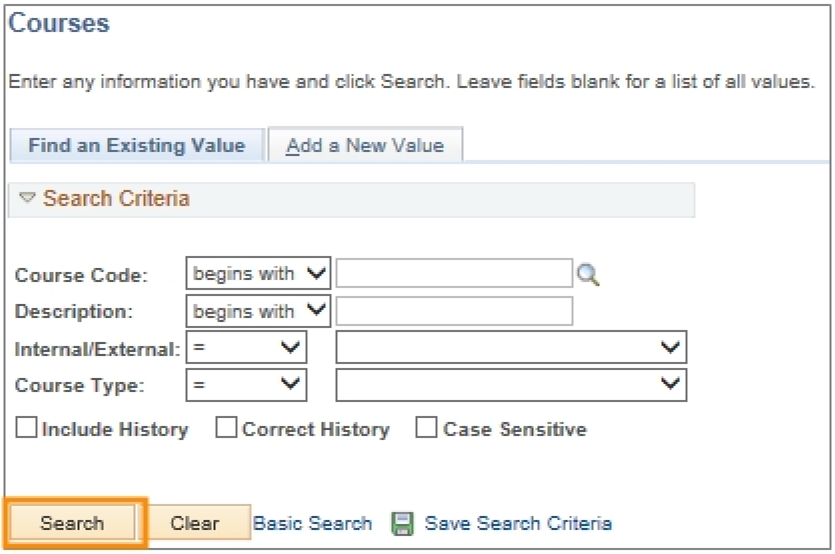
1. Choose this menu option:

   Main Menu > HR/Payroll Menu > Administer Training > Define Course / Cost Details > Courses

2. Complete as many fields as necessary to refine your search, or leave all the fields blank to see a complete list of courses:

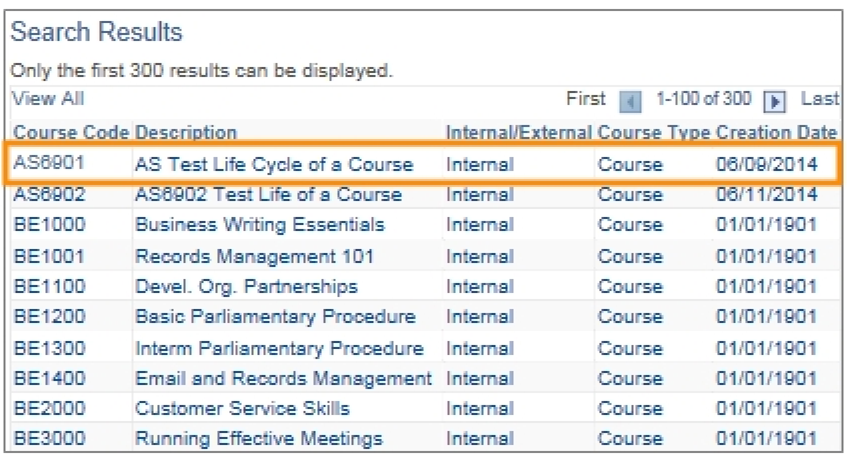
In this field:	**Do the following:**
Course Code	Enter the unique, numeric identifier assigned to this action. The code has two alpha and four numeric values, for example AA####.
Description	Enter key words used in the course's long title.
Internal/External	Leave the default of Internal.
Course Type	Leave this field blank.

3. Click the **Search** button.



Result: The system displays a list of courses that match yoursearch criteria.

4. Click the link for the course you need to update.



Course Code	Description	Internal/External	Course Type	Creation Date
AS6901	AS Test Life Cycle of a Course	Internal	Course	06/09/2014
AS6902	AS6902 Test Life of a Course	Internal	Course	06/11/2014
BE1000	Business Writing Essentials	Internal	Course	01/01/1901
BE1001	Records Management 101	Internal	Course	01/01/1901
BE1100	Devel. Org. Partnerships	Internal	Course	01/01/1901
BE1200	Basic Parliamentary Procedure	Internal	Course	01/01/1901
BE1300	Interm Parliamentary Procedure	Internal	Course	01/01/1901
BE1400	Email and Records Management	Internal	Course	01/01/1901
BE2000	Customer Service Skills	Internal	Course	01/01/1901
BE3000	Running Effective Meetings	Internal	Course	01/01/1901

Result: The system displays the Course Profile tab page.

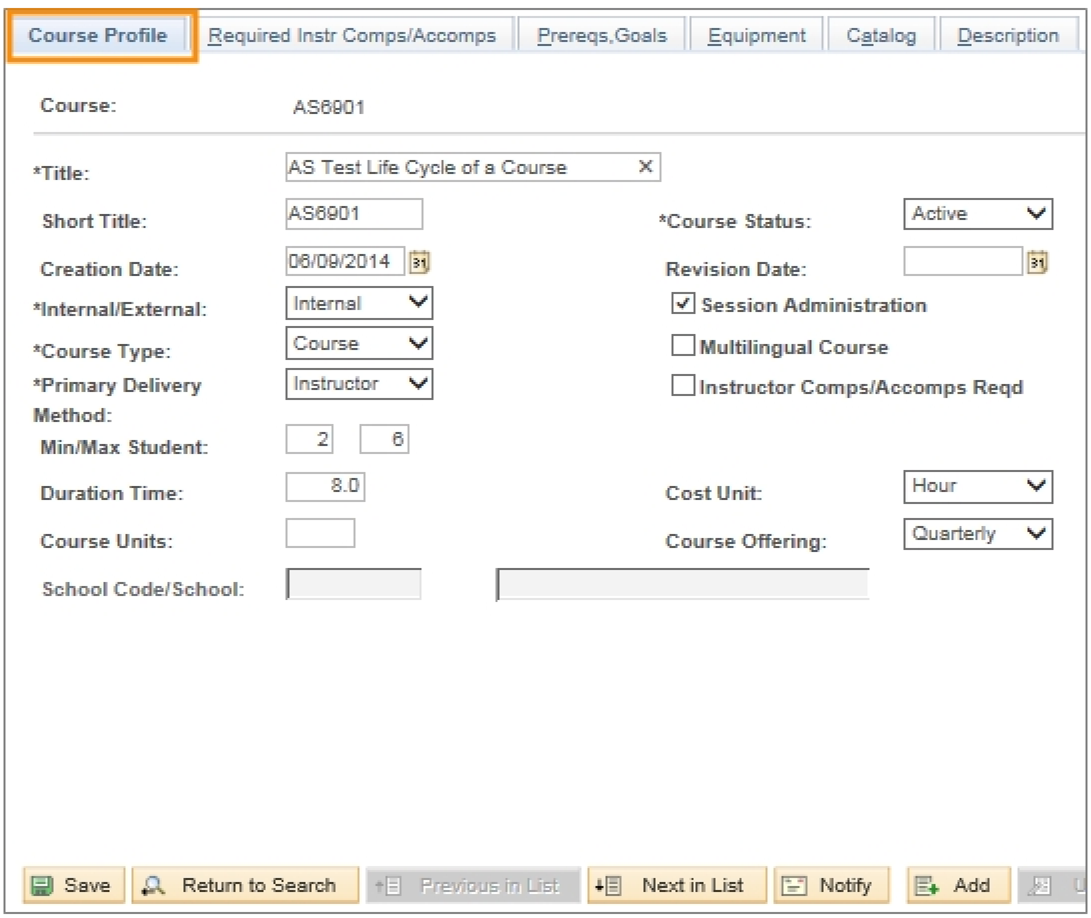
Course Profile Tab

5. The system fills in the fields with the information entered when the course was created. Modify the fields as necessary:

In this field:	Do the following:
Title	Using 30 characters or less, enter the new course's title.
Short Title	Using ten characters or less, enter the course's short title.

In this field:	Do the following:
Course Status	Choose one of the following: • **Active** for any course open for participant self enrollment • **Inactive** for a course that does not have future scheduled sessions • **Proposed** for a course that is active but sessions are not open for participant self enrollment
Creation Date	Use the default date.
Revision Date	Enter the date the new course information becomes active.
Internal/External	Leave the default value of Internal.
Session Administration	Mark this checkbox. This enables multiple sessions for the class to be set up in the system.
Course Type	Leave the default of Course.
Multilingual Course	Leave this field blank.
Primary Delivery Method	Leave the default value of Instructor. Rarely used additional options are: • Audio for pre recorded content • CBTfor computer based training programs • LunchLearn for content delivered with lunch • On-the-Job for activites completed on job site • Video for pre recorded content • Webinar for interactive, web-based delivery
Instructor Comps/Accomps Reqd	Leave this field blank.
Minimum Nbr of Students	Enter the minimum number of participants.
Maximum Nbr of Students	Enter the maximum number of participants.
Duration Time	Enter the expected number of hours the class will last, in 0.00 format.
Cost Unit	Leave the default value of Hour. This describes the units used in the Duration Time field.
Course Units	Enter the number of course credits, in X.X format.

In this field:	Do the following:
Course Offering	Choose one of the following units of time for scheduled courses: • Quarterly for classes scheduled four times per calendar year • Annually for classes scheduled one time per calendar year • As Determd for classes scheduled as needed • Half-Year for classes scheduled twice per calendar year • Monthly for classes scheduled once per month • Semester for classes scheduled twice per school year • Trimester for classes scheduled three times per school year

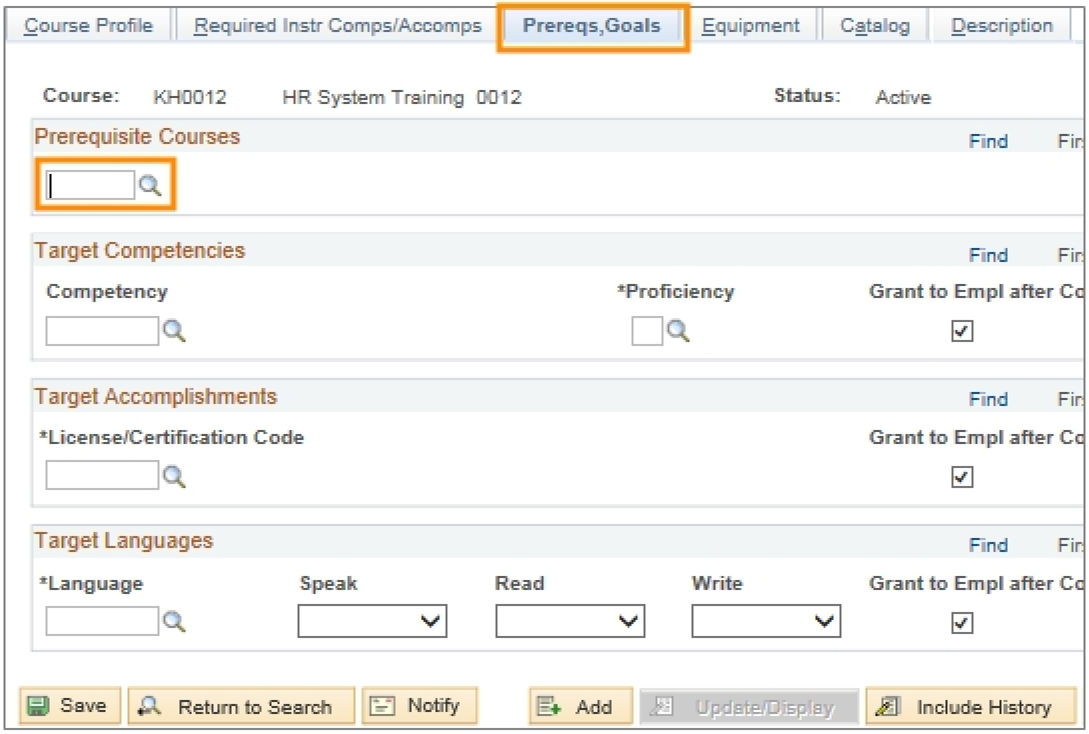


6. Click the **Prereqs,Goals** tab.

Prereqs,Goals Tab

7. The system fills in the following fields with information entered when the course was created. Modify the fields, as necessary:

In this field:	Do the following:
Prerequisite Courses	To change this course's prerequisite information, look up, or enter, the prerequisite's course code. Otherwise, leave this field blank.



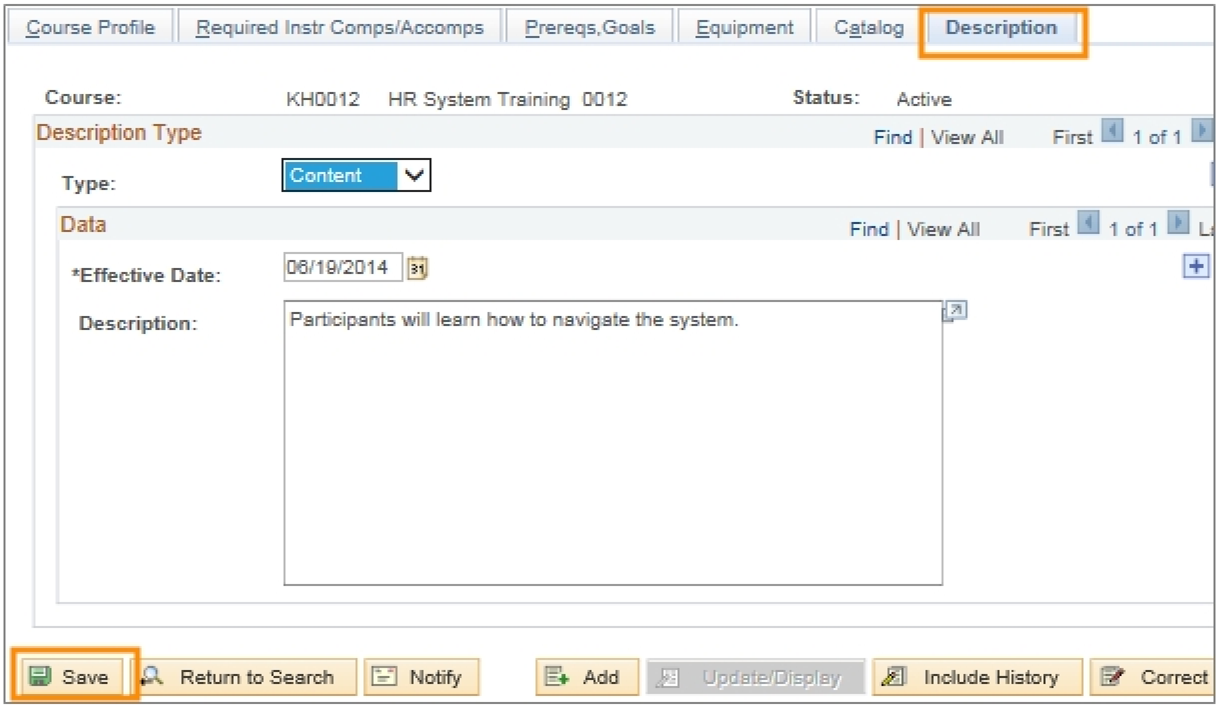
8. Click the **Description** tab.

Description Tab

9. The system fills in the following fields with information entered when the course was created. Modify the fields, as necessary:

In this field:	Do the following:
Description Type	Always choose **General**.
Effective Date	Enter the date the updated information becomes active. Note: Training records for particpants that have completed this course before the revision date are not affected.
Description	Update the description of the content covered in this class.

10. Click the **Save** button.



Result: The system updates the course information.

Changing an Existing Email Template

Overview

Sometimes after an email template has been created in a course group, details related to the course change (for example, parking locations, required materials, or contact information.) If these types of changes happen, you need to change the email template so participants receive correct information.

Changing an Existing Email Template

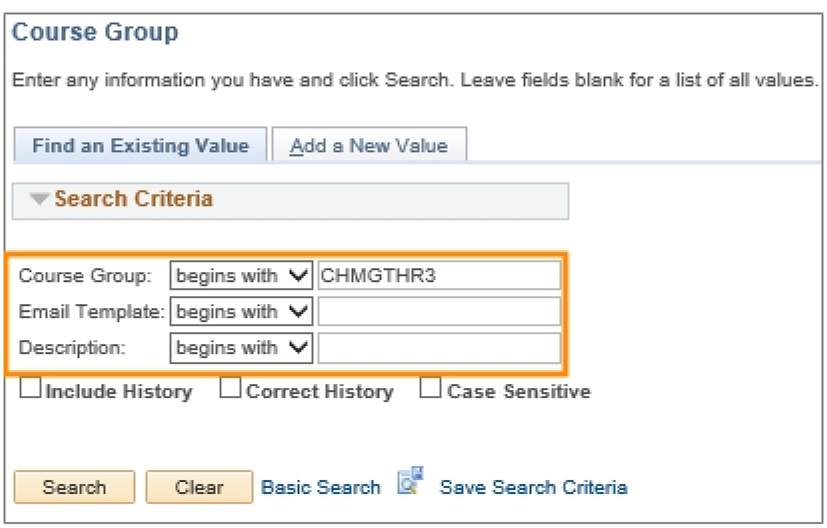
Follow these steps to change an existing email template:

1. Choose this menu option:

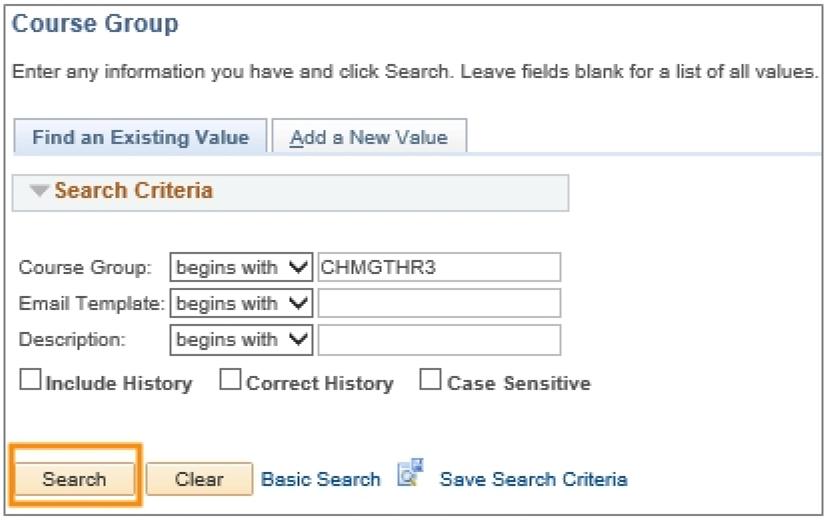
   Main Menu > HR/Payroll Menu> Administer Training > Define Course / Cost Details > Course Group

2. Complete at least one of the fields

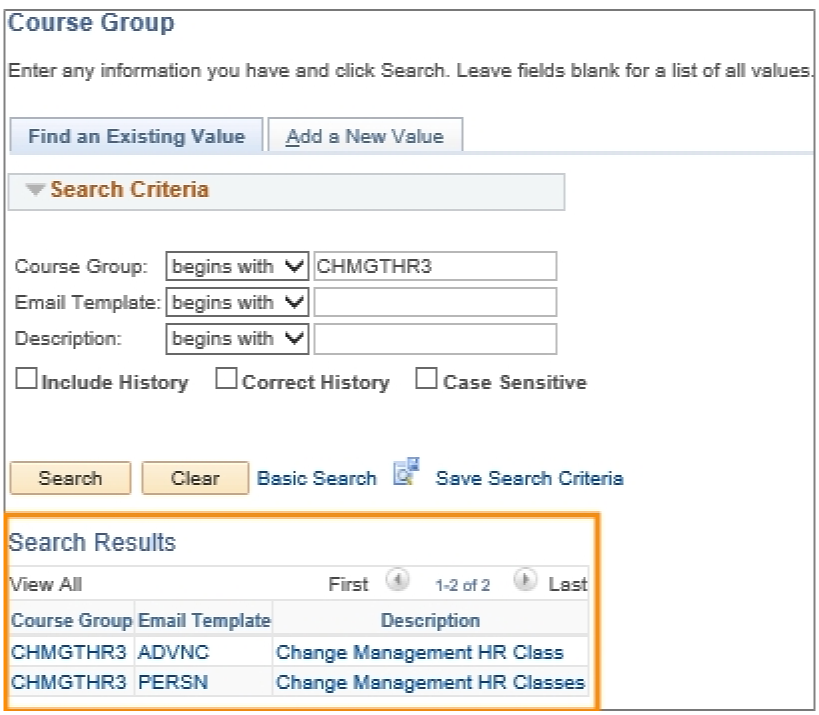
In this field:	Do the following:
Course Group	Enter the unique course group identifier.
Email Template	Enter the unique code that identifies the email template associated to the course group.
Description	Enter description words related to the course group you want to locate.



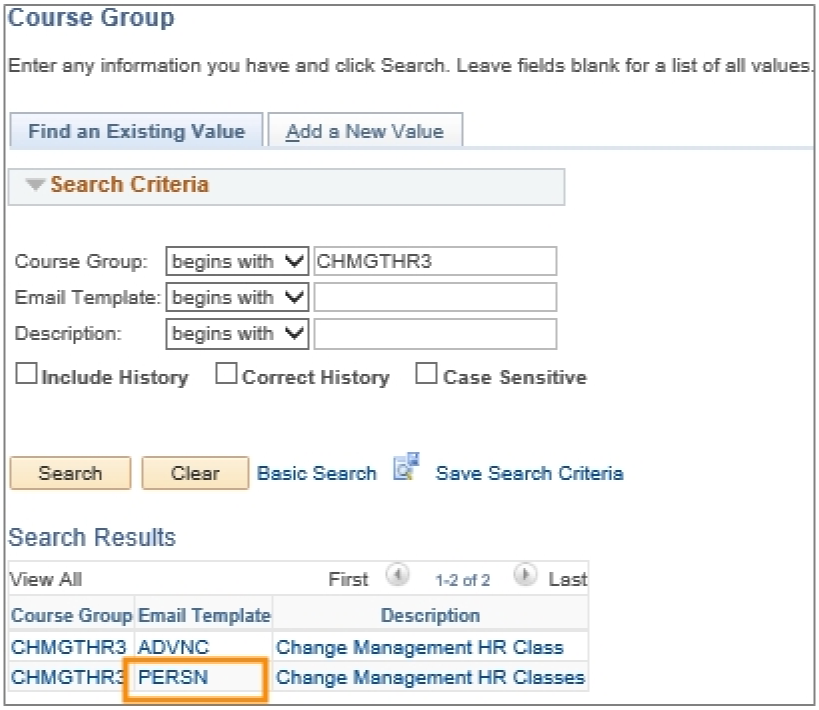
3. Click the Search button.



Result: The system displays email templates associated with course groups.

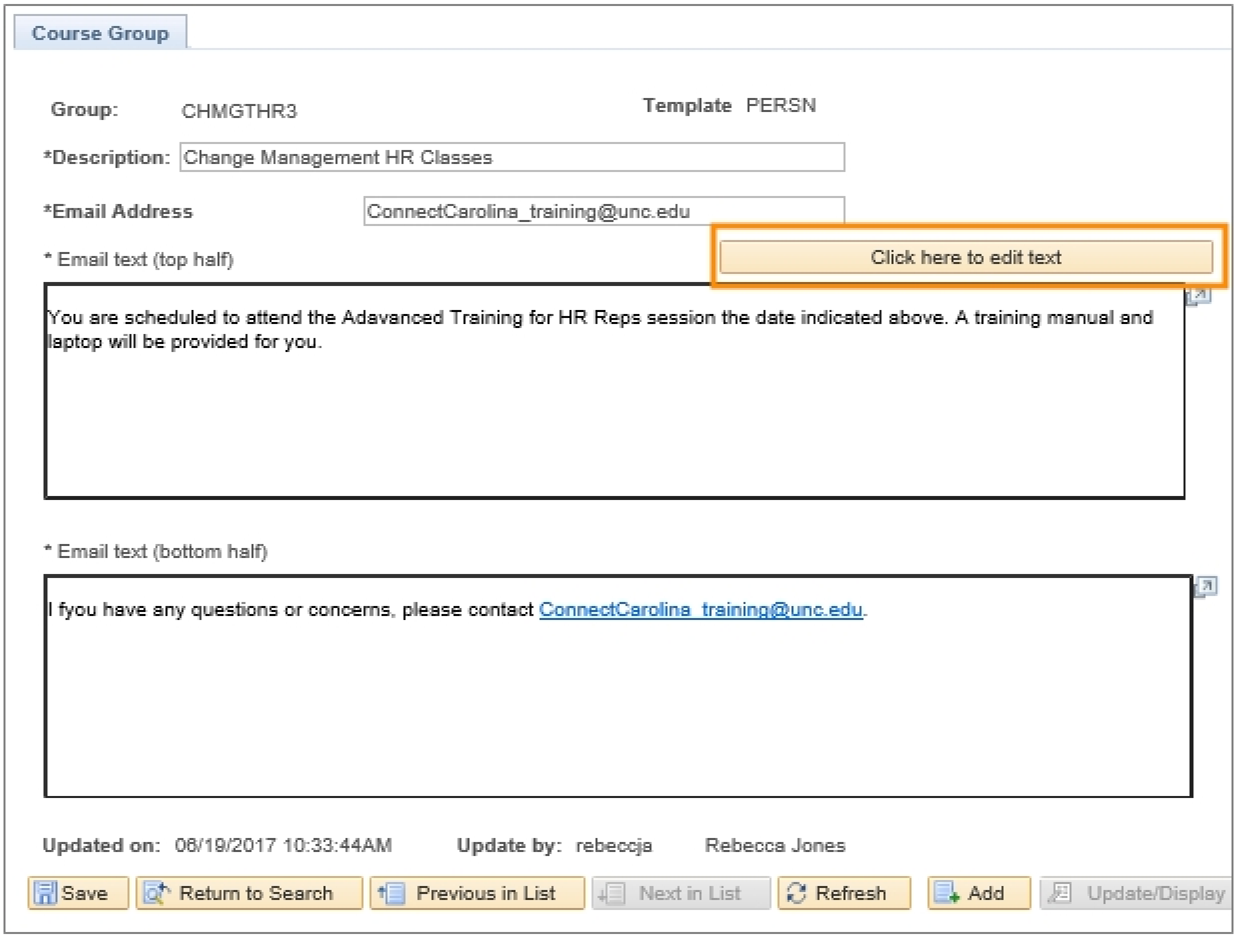


4. Click on the email template you want to change.



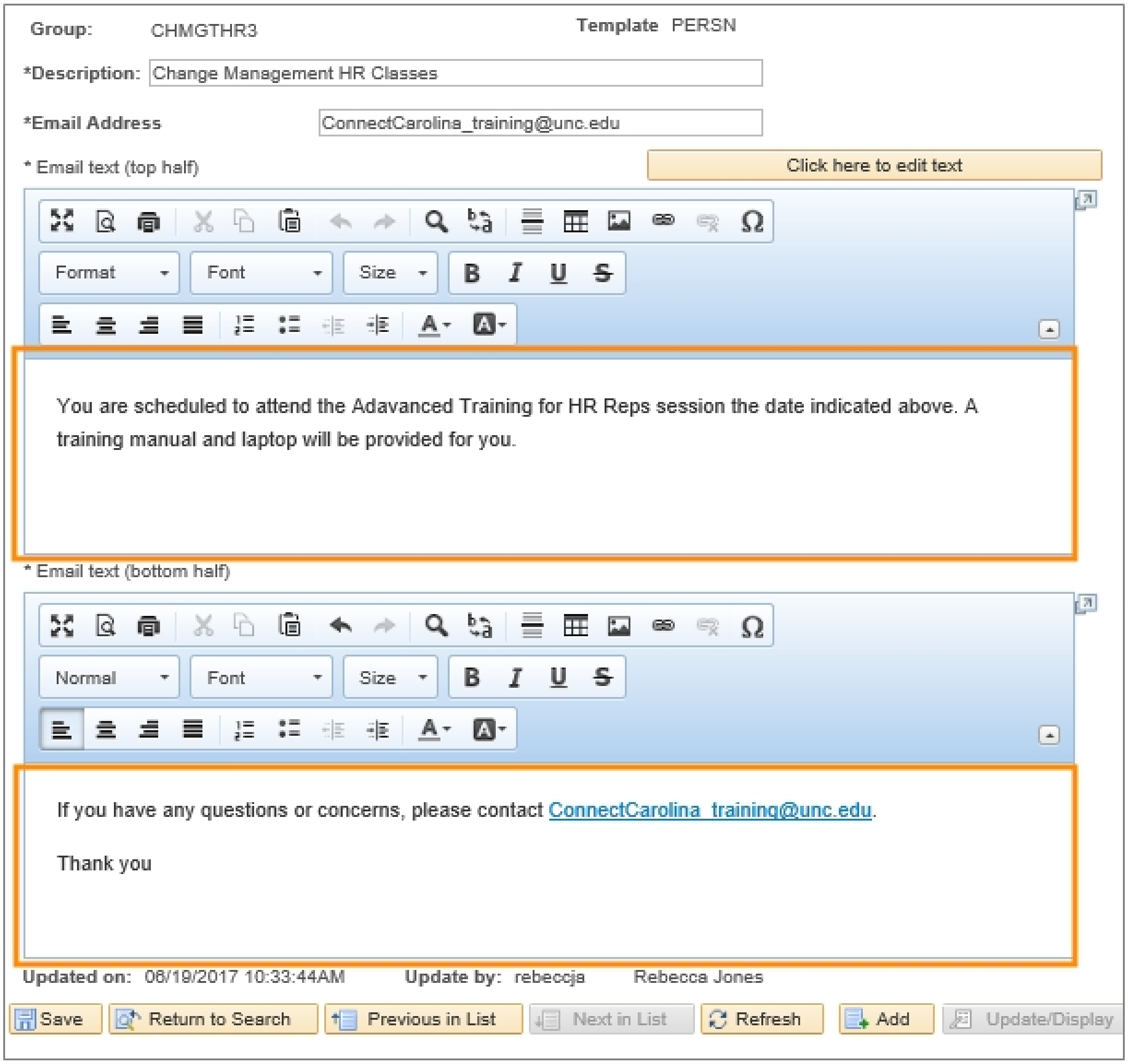
Result: The system displays the selected email template.

5. Click the **Click here to edit text** button.

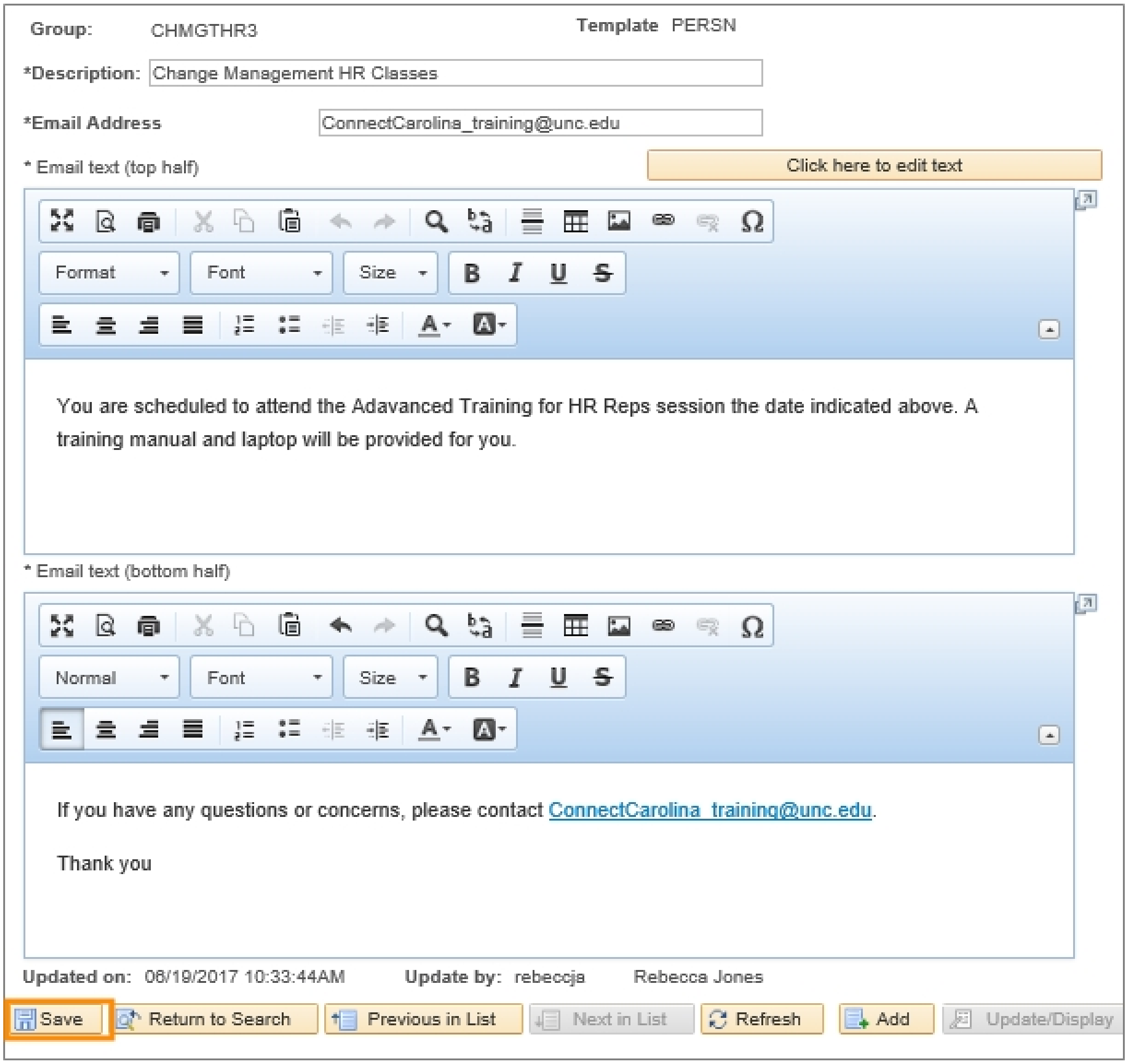


Result: The email text top half and bottom half are now editable.

6. Type the changes you want to make in the Email text (top half) and Email text (bottom half) fields.



7. Click the **Save** button.



Result: The system update the email template changes.

Adding an Email Template to a Course Group

Overview

When creating a course group, the system automatically assigns one email template to that course group. If you need more than one, you can go back into the system after the course group has been created and add an email template. If you have multiple courses associated to the course group, having email templates to match each course can be helpful.

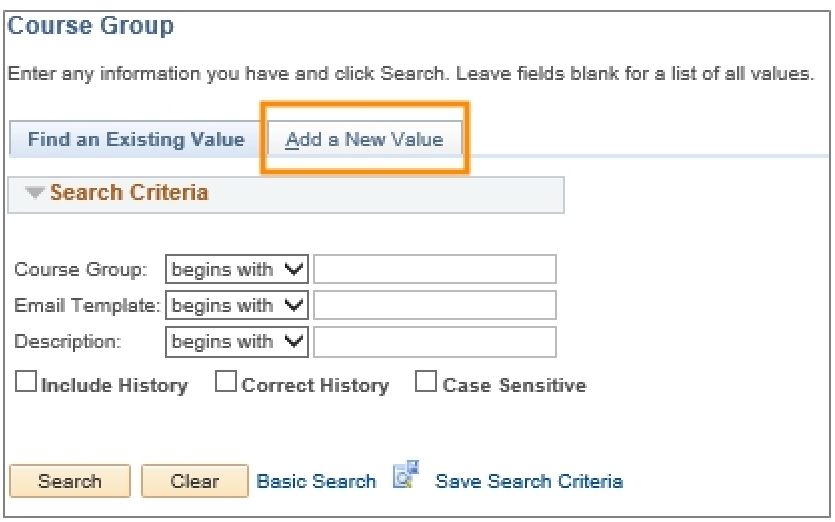
Adding an Email Template to a Course

Follow these steps to add an email template to a course group:

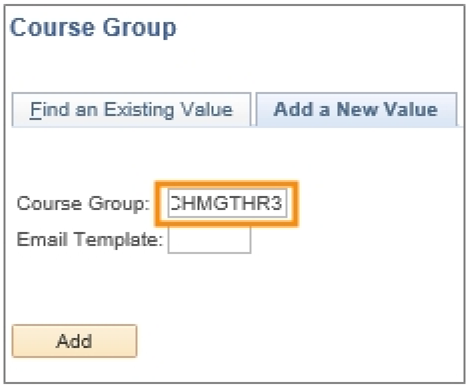
1. Choose this menu option:

   Main Menu > HR/Payroll Menu> Administer Training > Define Course / Cost Details > Course Group

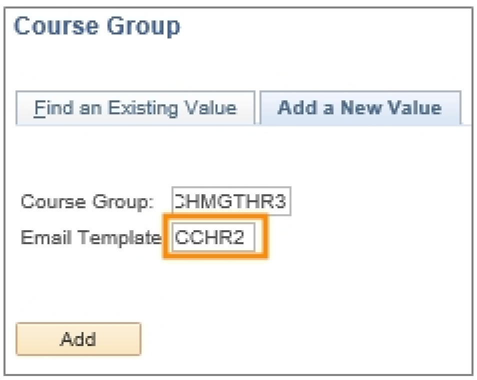
2. Click the **Add a New Value** tab.



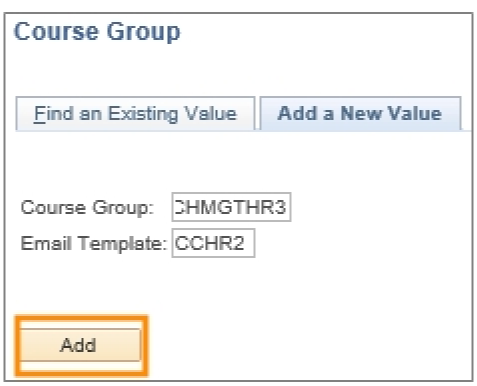
3. In the Course Group field, enter the existing course group's identifier.



4. In the Email Template field, enter the unique email template code you want to associate with the course group.



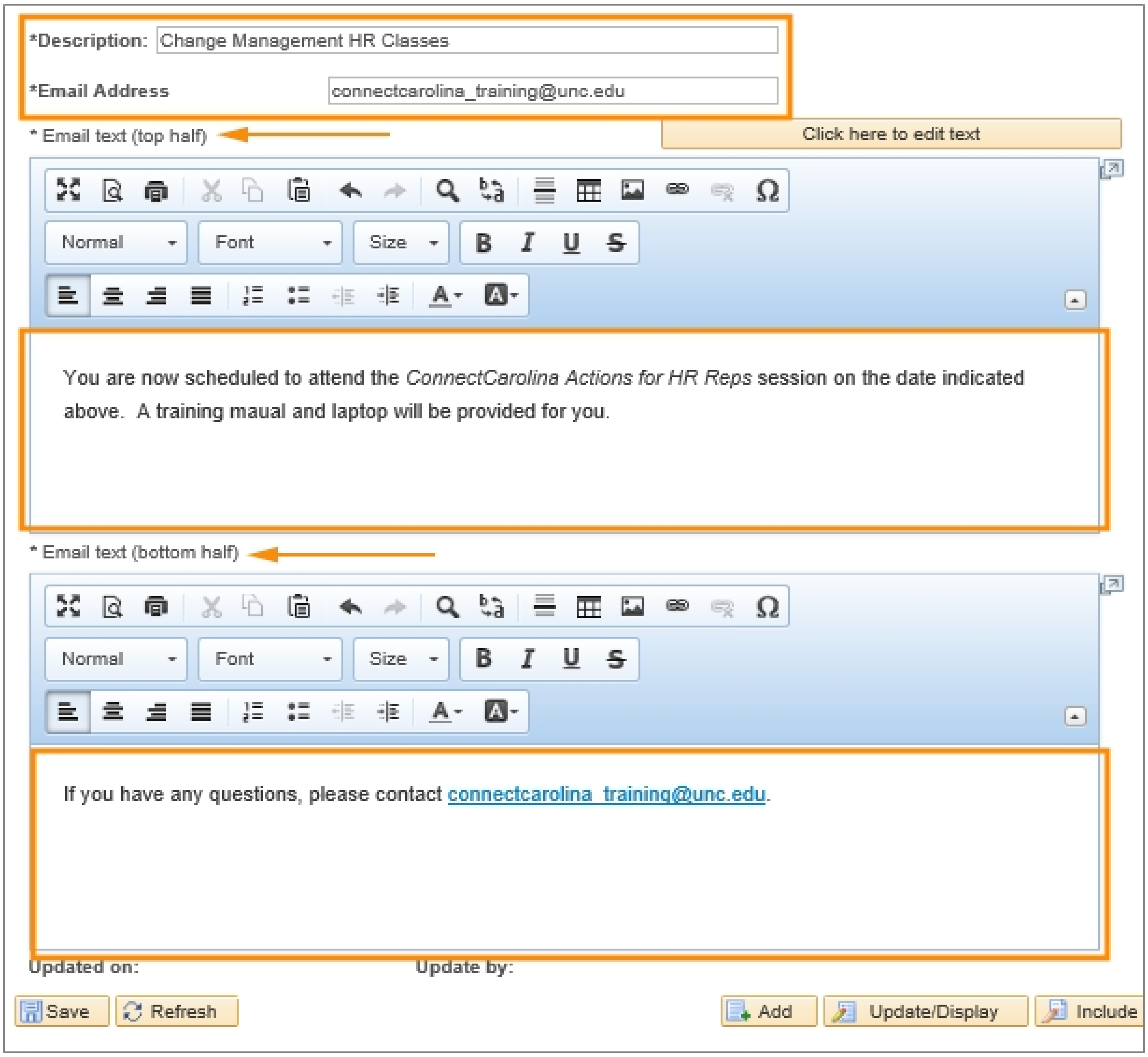
5. Click the **Add** button.



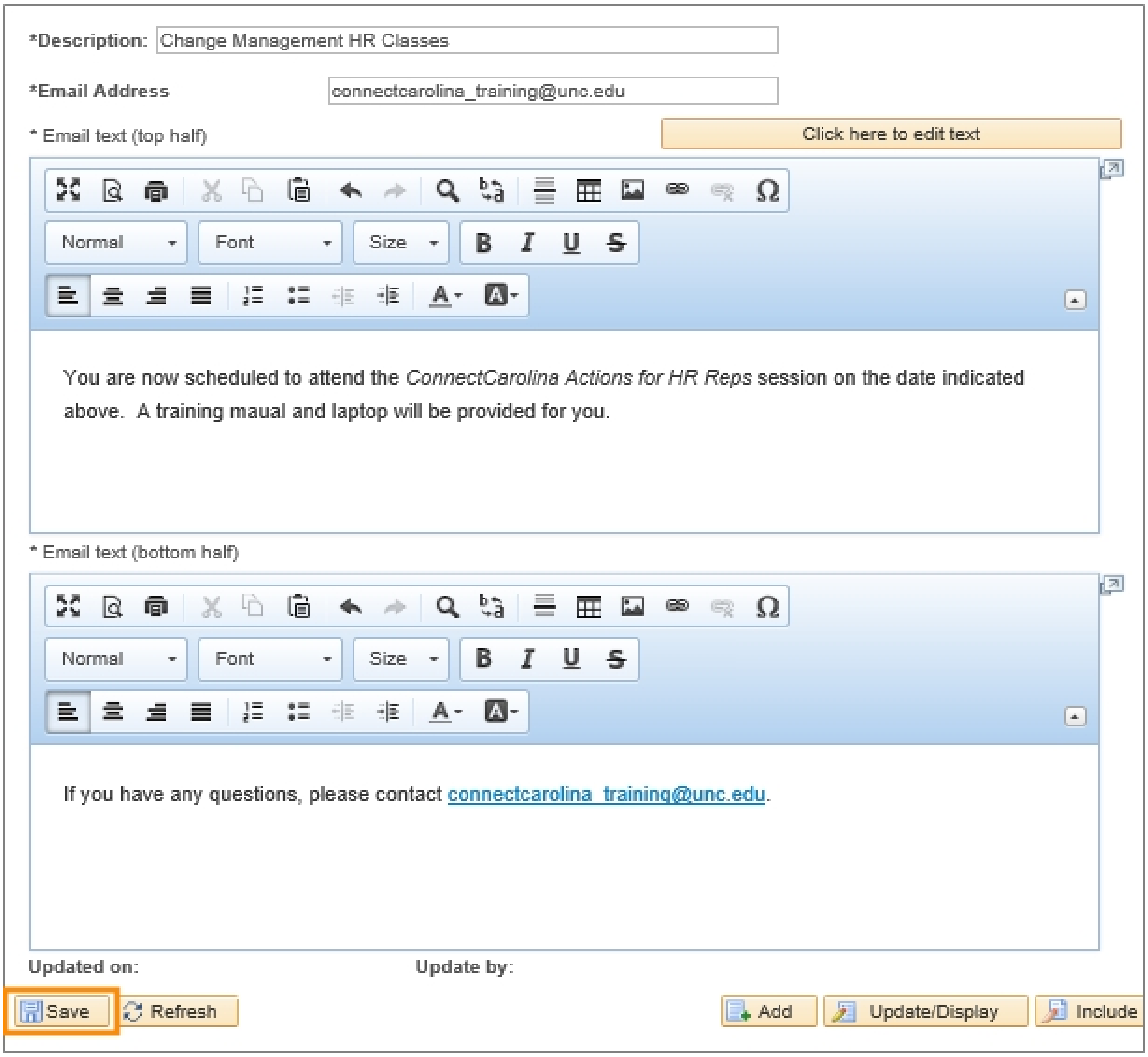
Course Data Tab

1. Complete the fields:

In this field:	Do the following:
Description	Enter a description of the Course Group using a maximum of 50 characters, Note: This description is used to describe the course group.
Email Address	Enter the email address the email message will be sent from. This is the same email address that participants will reply to. Note: We recommend using a shared mailbox or listserv instead of a personal email.
Email text (top half)	Enter any message you want to include in the paticipant's confirmation of registration email. For example, you can include a welcome message, course material information, parking instructions, etc. This message is also included in the class reminder email as well as the email to the participant when there is registration movement from the waitlist to enrollment. Notes: • Course logistics such as time, date, and location are automatically included in the email text so there is no need to add it here. • Message is limited to 4,000 characters.
Email text (bottom half)	Enter information such as point of contact phone numbers and email addresses should your participants have questions related to the course. This part of the email is included in every email sent to participants from the course group.



2. Click the **Save** button.



Result: The system adds this template to the course group.

Adding a Follow-up Email to the Learning Management System

Overview

The follow-up email is sent to participants that have completed a course session. It allows you to communicate with your participants through the Learning Management system one last time. The Follow-up Email first needs to be added to the Learning Management system, and then can be connected to a course. You can include any information such as follow-up classes or links to resources

Related Reference: See the chapter on Creating a Course to learn how to connect a Follow-up Email to a course.

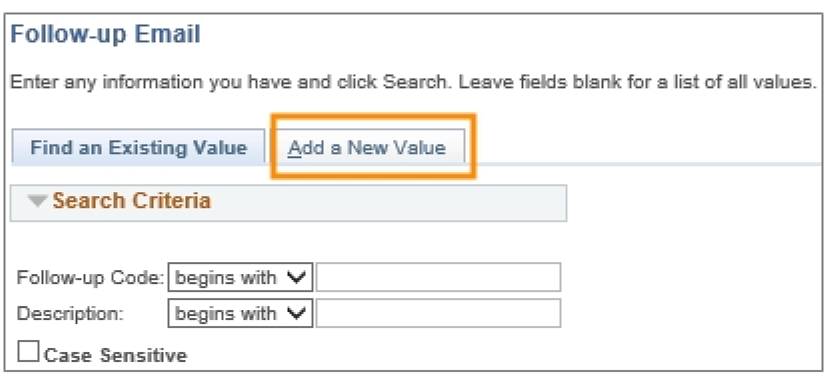
Adding a Follow-up Email to a Course

Follow these steps to add an email template to a course group:

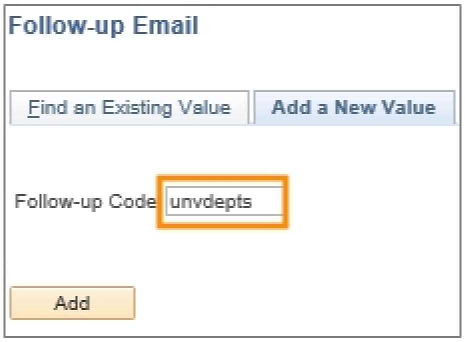
1. Choose this menu option:

   Main Menu > HR/Payroll Menu > Administer Training > Define Course / Cost Details > Follow-up Email

2. Click the **Add a New Value** tab.

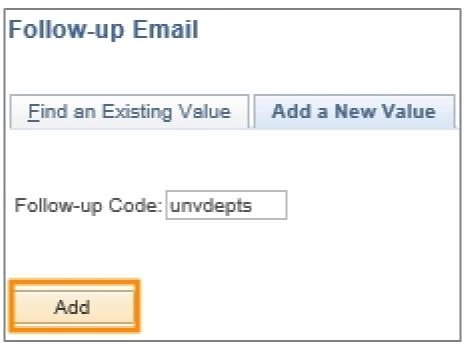


3. In the Follow-up Code field, enter an eight character identifier using numbers or letters.



Note: This field is not course sensitive. The system automatically makes the identifier all capps.

4. Click the **Add** button.

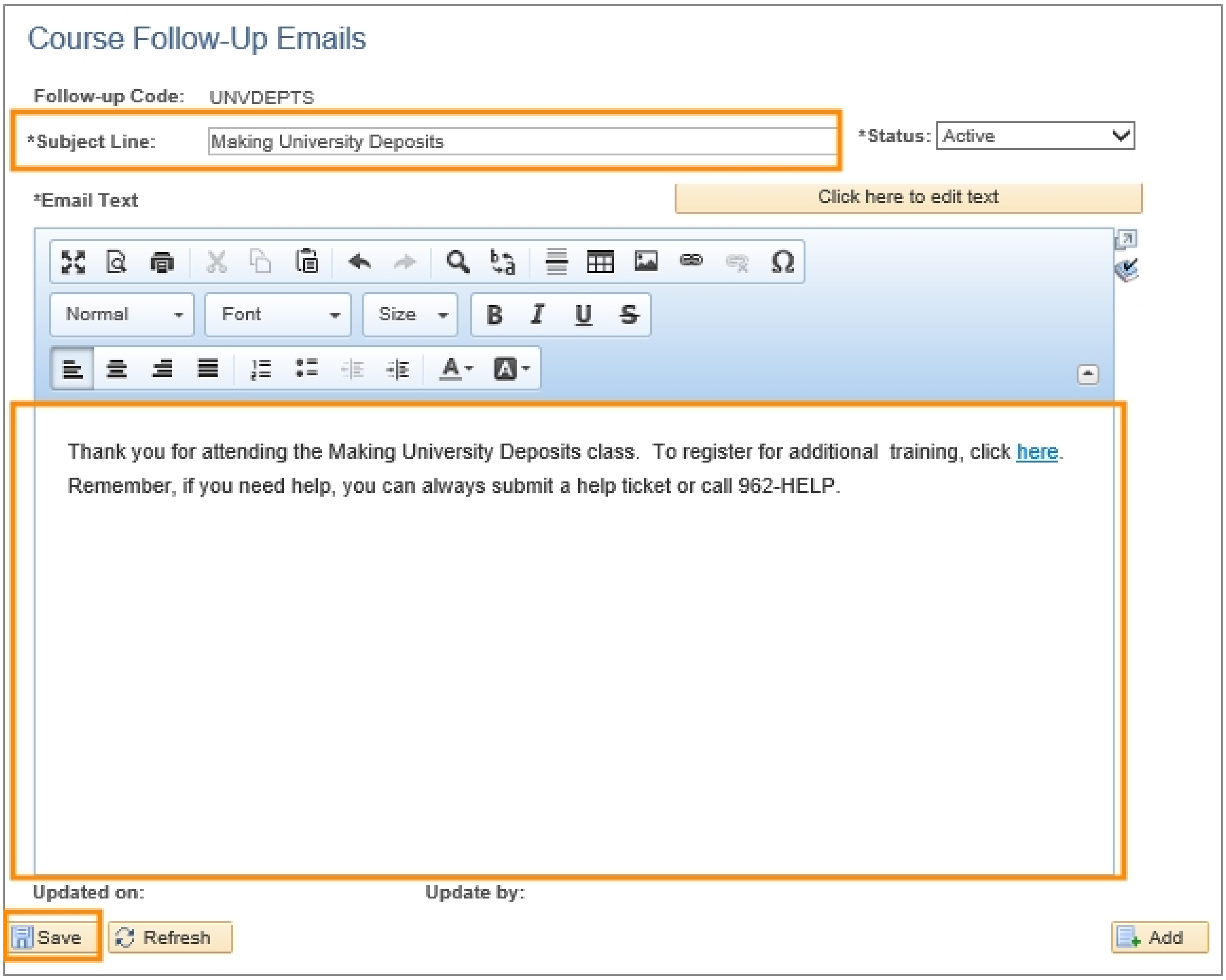


Result: The system displays the Course Follow-Up Emails page.

5. On the Course Follow-Up Emails page, complete the fields:

In this field:	**Do the following:**
Subject Line	Enter a description of the Follow-up Email using a maximum of 50 characters. This line will appear as the subject line in the recipient's email inbox.
Email text	Enter any message you want to include in the course's Follow-up Email. For example, you can include a link to other courses, or information on where to get help. Note: • Message is limited to 4,000 characters.

6. Click the **Save** button.



Result: The Follow-up Email is added to the Learning Management system.

Date	Participant	Comments
3/15/2017	Rebecca Jones	Initial draft complete, sent to editor
	<Editor>	Initial edits complete, returned to training developer
	<Training developer>	Editor comments incorporated
	<Training developer>	SME comments incorporated, sent back to editor

	<Editor>	Secondary edits complete, returned to training developer
	<Training developer>	Final changes complete

Deleting a Course Group

Overview

A department may need to delete an entire course group for a number of reasons. A course group can only be deleted when it is not connected to a course.

Deleting a Course Group

Follow these steps to delete a course group:

1. Choose this menu option:

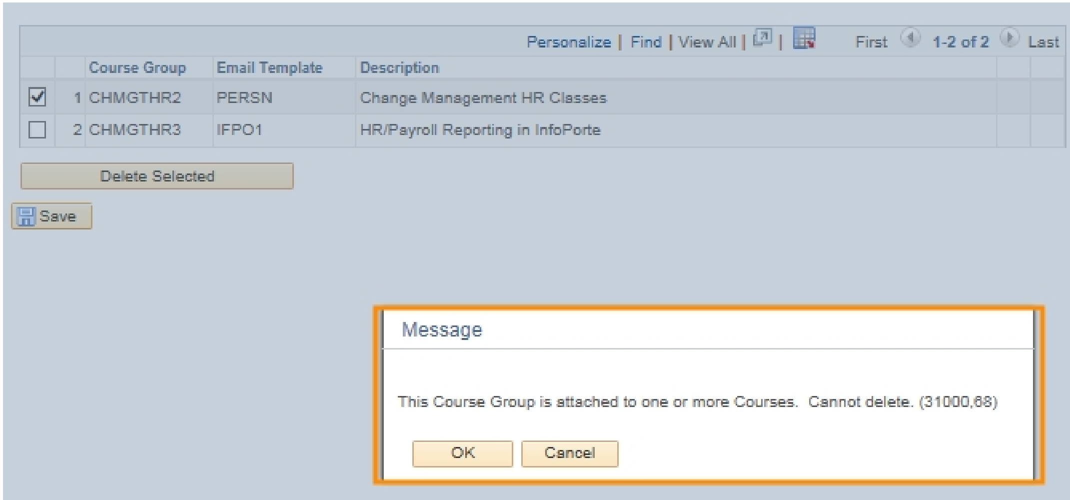
   Main Menu > HR/Payroll Menu > Administer Training > Define Course/Cost Details > Course Group Delete

2. In the list of course groups you have access to, click the check box next to the course group you want to delete.

3. Click the **Delete Selected** button.

   Results:

   - The course group selected for deletion no longer shows on the screen.
   - If the course group is attached to one or more courses, a message pops-up saying it cannot be deleted.



3. If the course group you selected no longer shows on the screen, Click the **Save** button.

4 Managing Attendance

In this chapter, you will learn how to:

- Print the training roster
- Update course session enrollment

Printing the Training Roster

Overview

The training roster is a list of registered participants for a particular training session. The training roster is used to track attendance for each session. There is a space for each participant to place their initials next to their name on the list. After class, the instructor uses the roster to mark class attendance in the system.

The system generates the roster as a report which includes:

- course name and number
- session number
- class date
- facilitator
- number of participants

For each registered participant, the report also includes:

- name
- PID
- department
- phone number
- email address

Printing the Training Roster

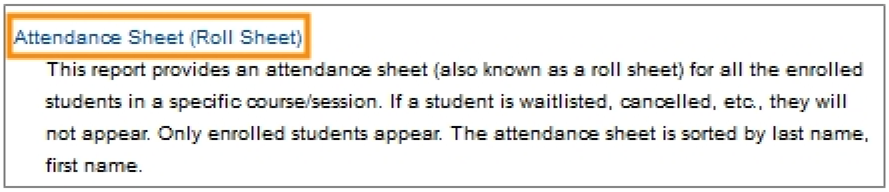
Follow these steps to print a training roster:

1. Choose this menu option:

   Main Menu > HR/Payroll Menu > Administer Training > Result Tracking > NC Learning Management Reports

   Result: The system displays the Learning Management Report Menu page.

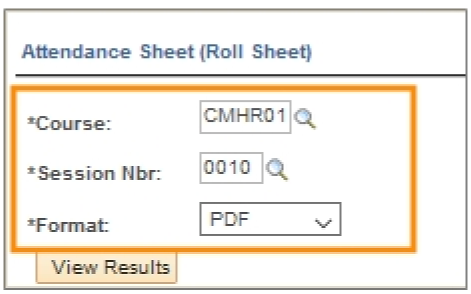
2. Click the **Attendance Sheet (Roll Sheet)** link:



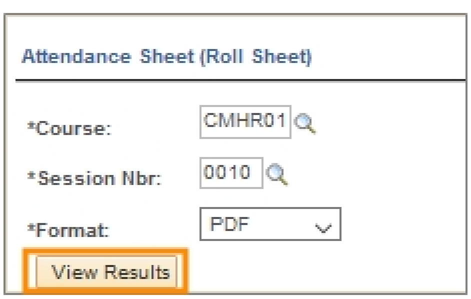
Result: The system displays the LM - page to run Attend Sheet screen.

3. Complete the fields:

In this field:	Do the following:
Course Code	Enter, or look up, the course number.
Course Session Nbr	Enter, or look up, the session number.
Format	Select the type of format you want to print your roster. • PDF • XLS (Excel)



4. Click **View Results**.



Result: The system displays the roster in a new browser window.

Updating Course Session Attendance/ Enrollment

Overview

After training has occurred, participants who came to class are given credit for the class in the system. This two-step process involves identifying who enrolled but did not come to class, then changing the session's status from active to complete.

Once the course session is marked complete, the status for the enrollees who participated is updated and their training summary reflects that they completed the course.

Related Reference

More information about enrollment is available under Registering a Participant for a Course.

More information about modifying a course session is available under Modifying a course session.

Menu Paths

- Main Menu > HR/Payroll Menu > Administer Training > Student Enrollment > Enroll Individually
- Main Menu > HR/Payroll Menu > Administer Training > Define Course/Cost Details > Course Sessions

Updating Course Session Enrollment

Follow these steps to update the course session enrollment:

1. Choose this menu option:

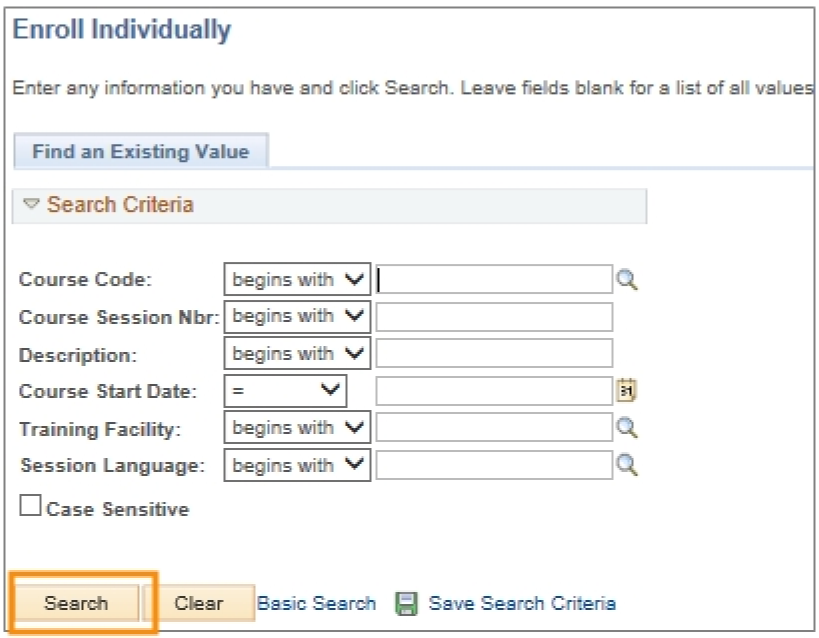
   Main Menu > HR/Payroll Menu > Administer Training > Student Enrollment > Enroll Individually

2. Complete as many fields as necessary to refine your search, or leave all the fields blank to see a complete list of courses sessions:

In this field:	Do the following:
Course Code	Enter the unique code assigned to this course. The code has two alpha and four numeric characters, for example, AA####.
Course Session Nbr	Enter the four-digit number assigned to this course session.

In this field:	Do the following:
Description	Enter words used in the course's long title.
Course Start Date:	In MM/DD/YYYY format, enter the session's start date.
Training Facility	Look up, or enter, the training session's location.
Session Language	Leave this field blank.

3. Click the **Search** button.



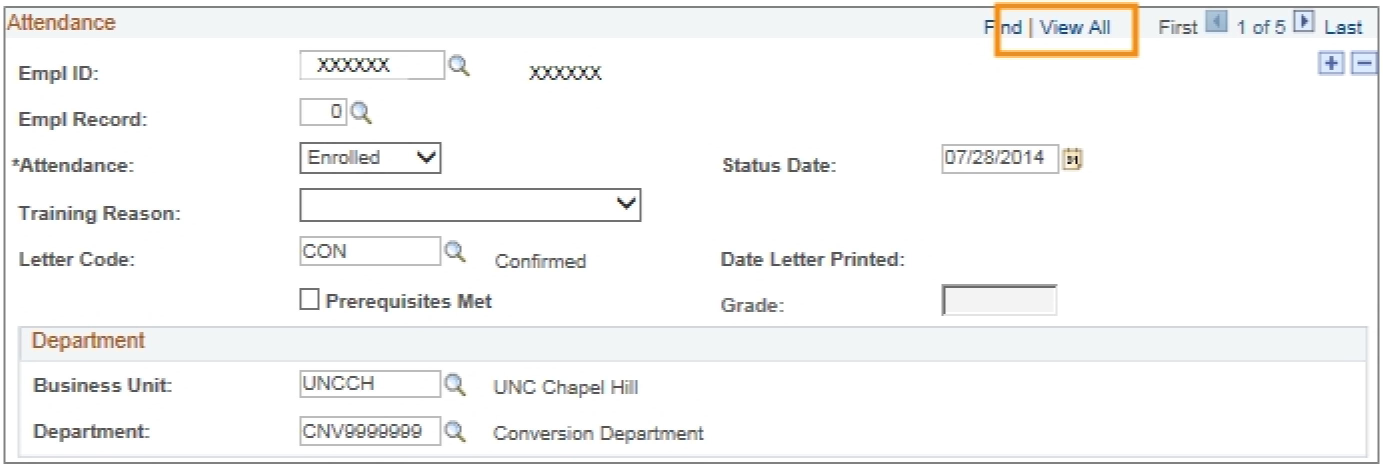
Result: The system displays a complete list of course sessions that match the criteria you specified.

4. Click the link for the couse session whose participants you want to mark as absent.

Course Code	Course Session Nbr	Description	Course Start Date	Training Facility	Training Facility Name
BE2000	0280	Customer Service Skills	11/25/2014	AOB	Administrative Office Buildir
BE7000	0160	Business Writing Challenges	11/06/2014	(blank)	104 Airport Drive, 1501-A&B
BE1000	0230	Business Writing Essentials	09/11/2014	(blank)	104 Airport Drive, 1501-A&B
BE2000	0270	Customer Service Skills	09/05/2014	(blank)	104 Airport Drive, 1501-C
BE8000	0170	Critical Thinking Skills	08/21/2014	(blank)	104 Airport Drive, 1501-A&B

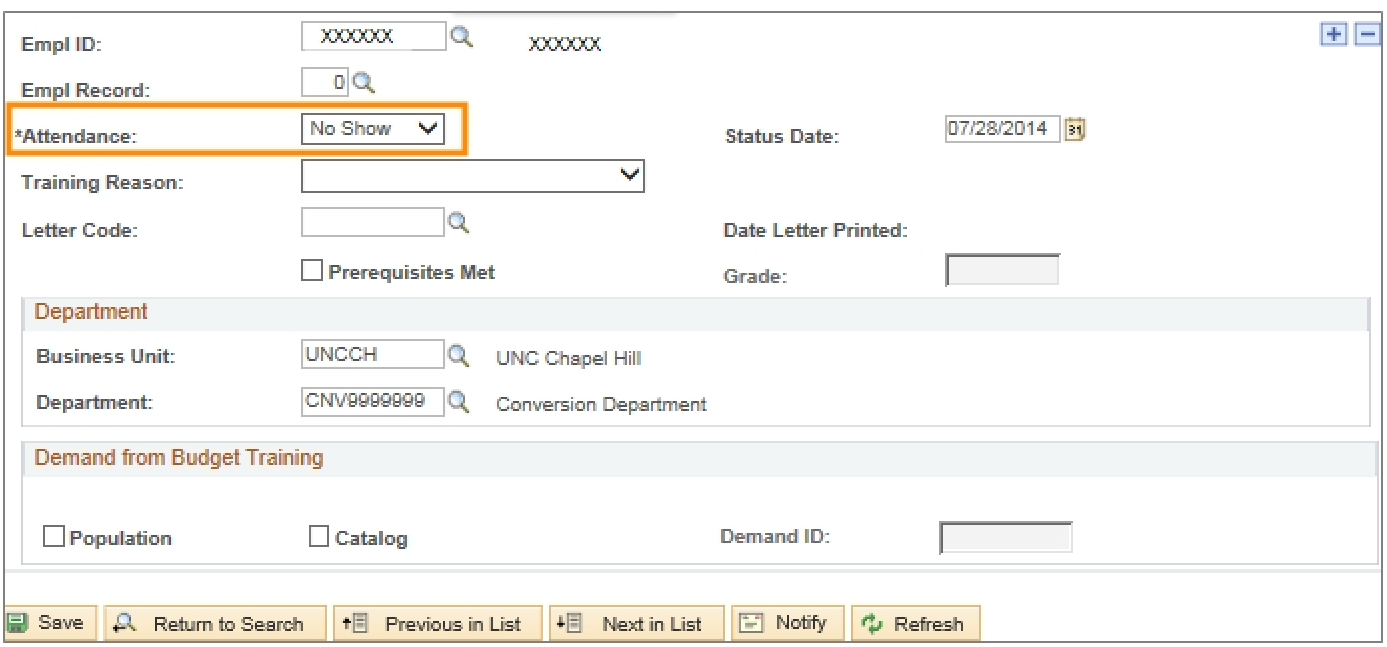
Result: The system displays the Enroll Individually page with information about the class including the minimum and maximum students allowed and the number of participants registered.

5. Click **View All** link to see a complete list of registered participants.

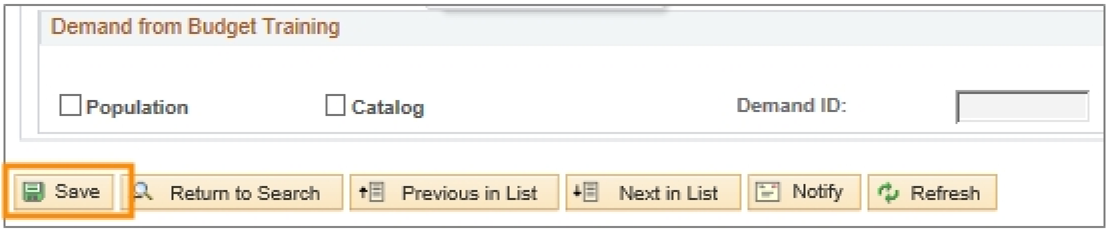


6. For the participants that did not come to class as expected, change their attendance status.

In this field:	Do the following:
Attendance	Choose **No Show** from the list box to indicate that the enrolled participant did not show up for the scheduled course session.



7. Click the **Save** button.



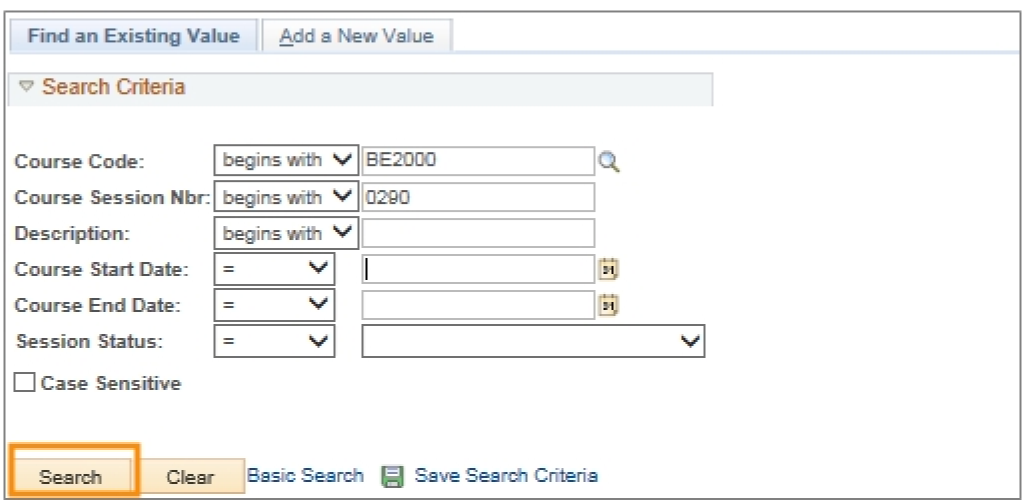
8. Choose this menu option:

   Main Menu > HR/Payroll Menu > Administer Training > Define Course/Cost Details > Course Sessions

9. Complete the following fields.

In this field:	Do the following:
Course Code	Enter the unique code assigned to this course. The code has two alpha and four numeric characters, for example, AA####.
Course Session Nbr	Enter the four digit number assigned to this course session.

10. Click the **Search** button.

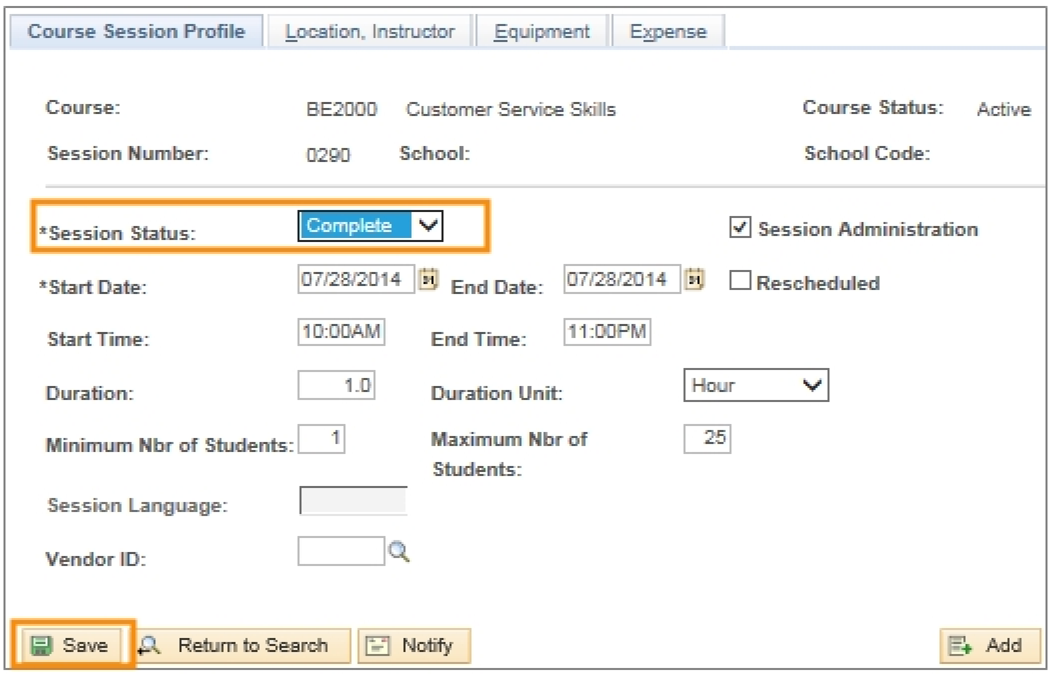


    Result: The system displays all a list of course session that match the criteria you specified.

11. Click the link for the course session that you are updating enrollment for.

12. Complete the field:

In this field:	**Do the following:**
Session Status	Change the session status from Active to Complete.



13. Click the **Save** button.

Result: The system updates the enrolled participants' status to complete, and updates their training summary to reflect their participation in this course.

5 Manager WorkCenter

In this chapter, managers will learn:

- How to access training records in Manager WorkCenter

Seeing Training Records in Manager WorkCenter

Overview

All training records dating back to 1991 that have been uploaded to ConnectCarolina are available to be seen by supervisors who have employees reporting to them currently, either directly or indirectly. For example, classes taken through the Office of Human Resources such as Ethics in the WorkPlace, show on the employees training record.

> **Note:**Classes of a personal nature such as Planning for Parental Leave or Let's Talk TSERS, do not show on the employees training record.

As long as you have someone reporting to you, you are automatically granted access to see training records.

Accessing Training Records

Follow these steps to access training records in ConnectCarolina:

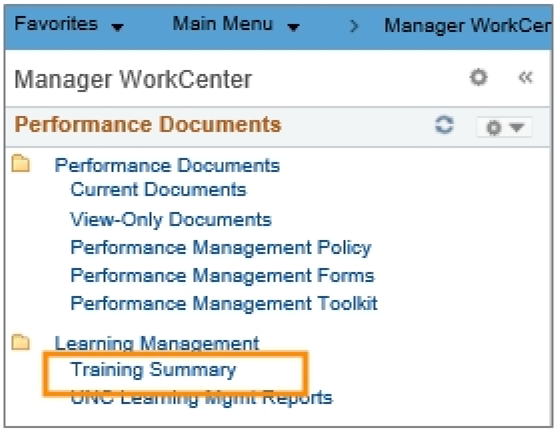
1. Choose this menu option:

   HR/Payroll Menu> Manager WorkCenter

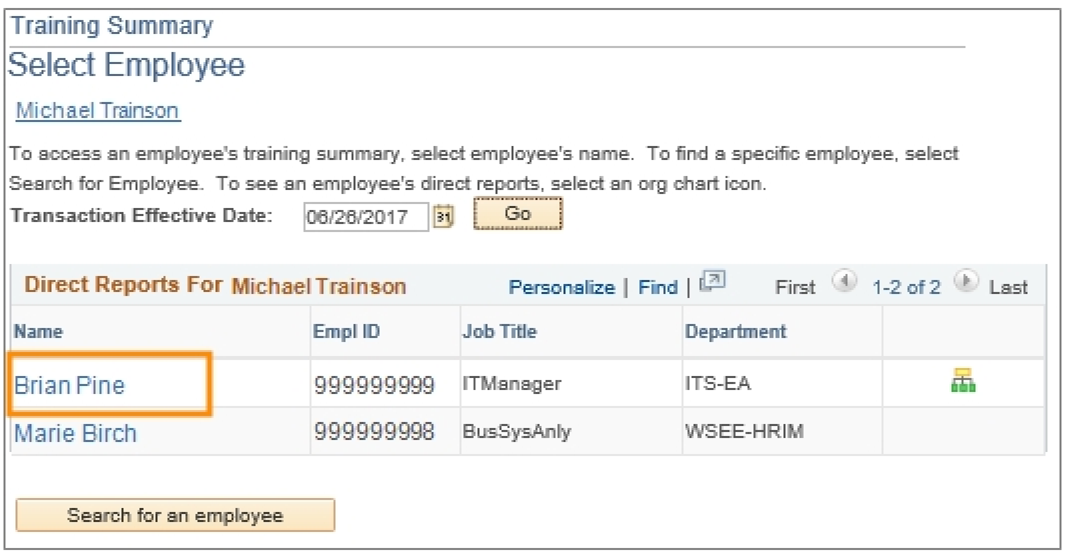
   Result: The system displays the UNC Manager WorkCenter page.

2. Click **Training Summary**.



Result: ConnectCarolina opens the Training Summary page. This shows a list of employees who report to you directly.

3. Click on the name of the employee to see his or her training record.



Result: The system displays the employee's training summary.

4. To return to the Select Employee page, click **Return to Select Employee**.

Training Summary

Brian Pine

Select the Internal Training Course Name to view Details.

Internal Training

Course Name	Course Start Date	Course End Date	Status
Valuable Presentation Skills	05/03/2017	05/10/2017	Completed
Intro Situational Leadership®	04/27/2017	04/27/2017	Completed
Managing Projects Successfully	04/10/2017	04/11/2017	Incomplete
Running Effective Meetings	03/23/2017	03/23/2017	Completed
Conflict Mgmnt - Skills	03/08/2017	03/08/2017	Completed
Effective Decision Making	02/22/2017	02/22/2017	Completed
Managing Interactions	04/28/2015	04/29/2015	Completed
Coaching Skills 101	02/10/2015	03/25/2015	Completed
SPA Orientation	04/21/2009	04/21/2009	EE Cancel

Other Professional Training

Course Name	Course Start Date	Course End Date	Status	Facility/School

Return to Select Employee

Go To: Manager Self Service

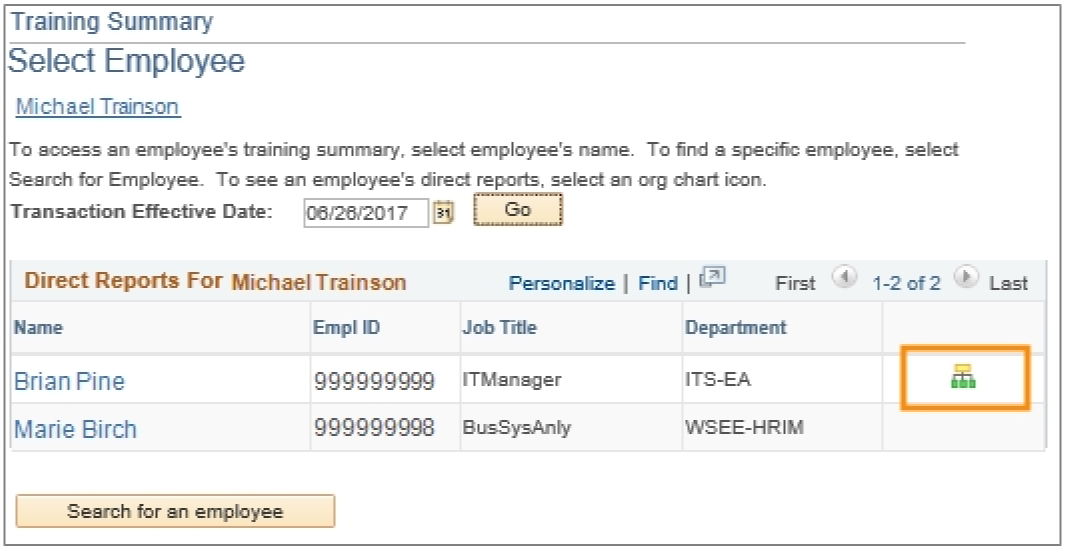
Learning and Development

Enroll this employee in an internal training course

Seeing Training Records of Employees who Report to You Indirectly

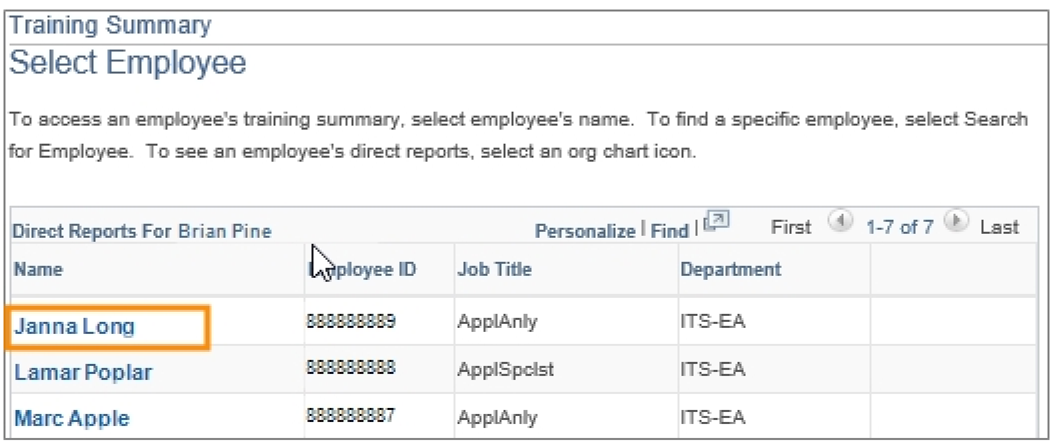
If your direct employee has an icon on the same row as his or her name, that means he or she has at least employee who reports to them.

1. On the Training Summary Direct Reports page, click the **View Employee's Direct Reports** icon on the same row as the employee who reports to you directly.



Result: The system displays employees who report to the employee you chose.

2. Click the name of the employee to view their training record.

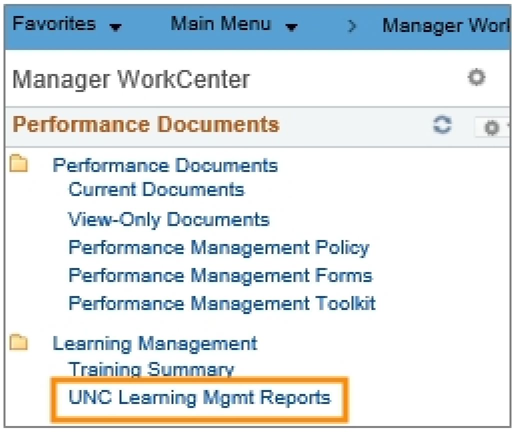


Result: The system displays the employee's training summary.

Downloading Training Reports

Downloading a training report allows you to enter a date range, and shows you the training reports of your direct and indirect employees at the same time.

1. On the UNC Manager WorkCenter page, click **UNC Learning Mgmt Reports**.

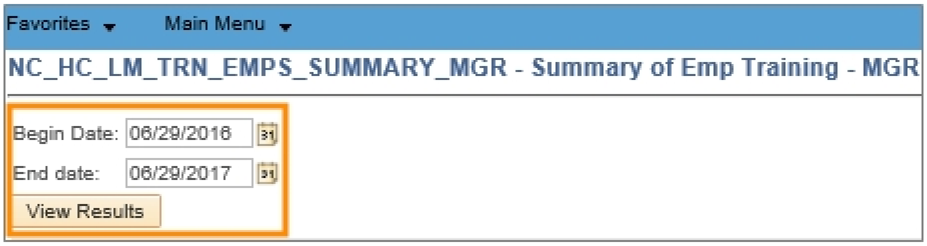


Result: The system displays a list of Learning Management Reports.

2. Click the name of the report you want to run.

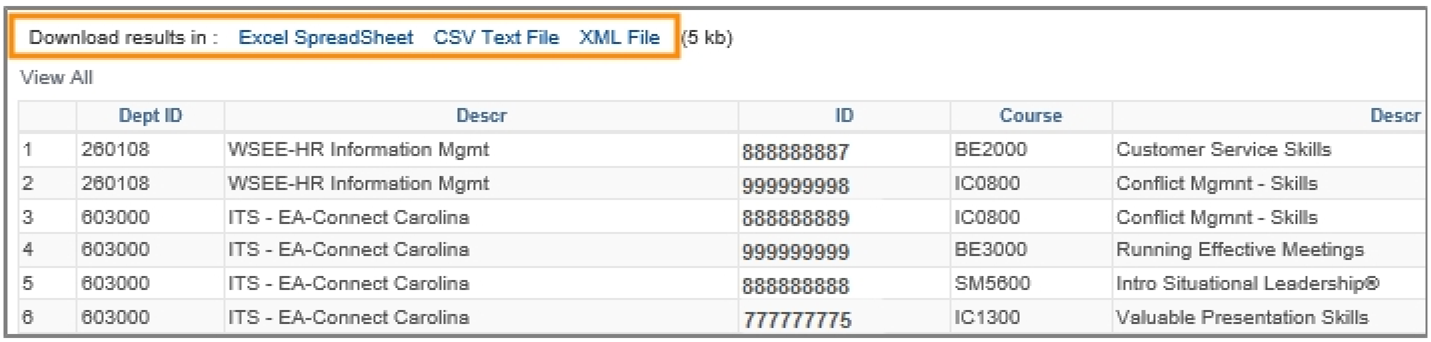
Value	Description
Course Activity Report Summary	This report shows the names of courses, instructors names, and enrollment status for a selected date range. This report does not show employee names or identification numbers (PIDs).
Employee Training Detail Report	This reports shows detailed training summaries of all employees that report to you directly or indirectly within a selected date range. Each employee's name and PID show on this report along with the course name, attendance status, and course dates.

3. Enter the date range you want to see, and click **View Results**.



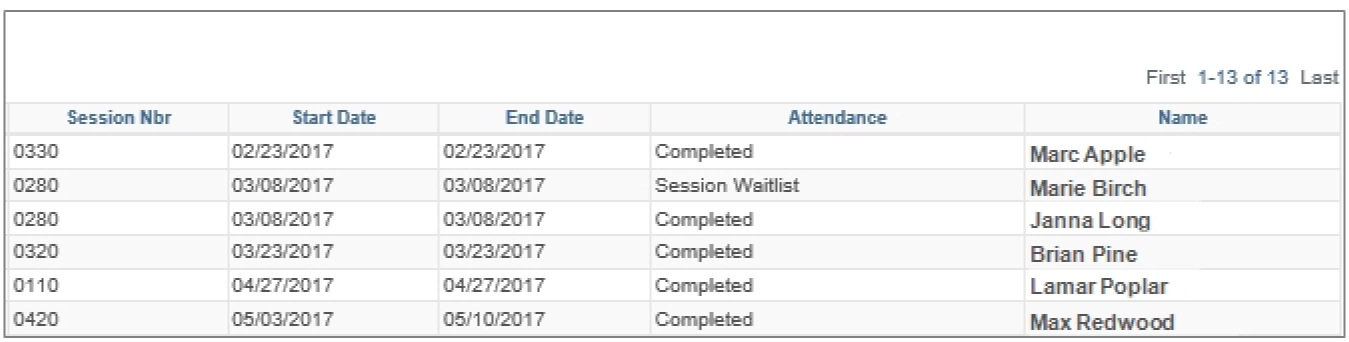
Result: The system displays the training report for your direct and indirect employees.

4. Click on your preferred way to download the training report.


Download results in : Excel SpreadSheet CSV Text File XML File (5 kb)

View All

	Dept ID	Descr	ID	Course	Descr
1	260108	WSEE-HR Information Mgmt	888888887	BE2000	Customer Service Skills
2	260108	WSEE-HR Information Mgmt	999999998	IC0800	Conflict Mgmnt - Skills
3	603000	ITS - EA-Connect Carolina	888888889	IC0800	Conflict Mgmnt - Skills
4	603000	ITS - EA-Connect Carolina	999999999	BE3000	Running Effective Meetings
5	603000	ITS - EA-Connect Carolina	888888888	SM5600	Intro Situational Leadership®
6	603000	ITS - EA-Connect Carolina	777777775	IC1300	Valuable Presentation Skills


First 1-13 of 13 Last

Session Nbr	Start Date	End Date	Attendance	Name
0330	02/23/2017	02/23/2017	Completed	Marc Apple
0280	03/08/2017	03/08/2017	Session Waitlist	Marie Birch
0280	03/08/2017	03/08/2017	Completed	Janna Long
0320	03/23/2017	03/23/2017	Completed	Brian Pine
0110	04/27/2017	04/27/2017	Completed	Lamar Poplar
0420	05/03/2017	05/10/2017	Completed	Max Redwood

Note: Your downloaded results go to different places on your computer screen depending on which internet browser you are using. For example, if you are using Firefox Mozilla, your report goes to an arrow icon on the top right of your browser. If you are using Internet Explorer, a series of prompts show up on the bottom of your browser leading you to your report.

6 Uploading Training Records

In this chapter, you will learn how to:

- Upload training records into the ConnectCarolina learning management system.

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Uploading Training Records

If you have training offered outside of ConnectCarolina, the upload process lets you get those training records into ConnectCarolina. The advantage of the training being uploaded is that employees can see the training they've taken at the Office of Human Resources and any other training that is uploaded into or managed in ConnectCarolina all in one place. Supervisors can also see all the training their employees have taken, which can be helpful at performance review time. So far, only training for the Office of Human Resources and a few other types of training are in ConnectCarolina, but the list growing.

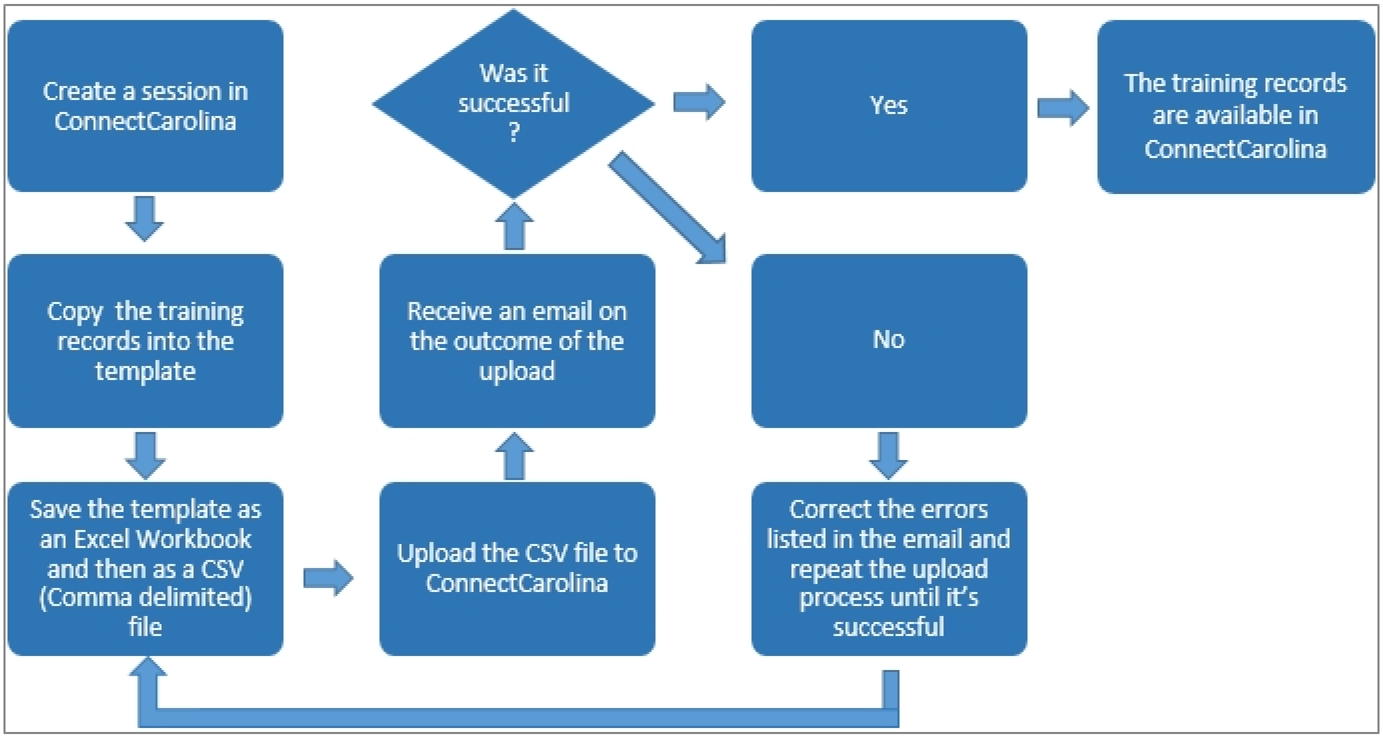
Ways to Upload

There are three ways to get training records into ConnectCarolina:

- If you only have a few records to upload, you can go directly into the system and enter them manually. Refer to the Registering a Participant for a Course section for details on how to do this.
- If you have more than a few records to upload, the most common way is to export training records from your training management system and then copy and paste the records into the template that the ConnectCarolina team gives you. This is the method that is covered in this section.
- If you have a high volume of training records that need to be uploaded, another option is to have the process automated. If you think you might have this need, create a help request at help.unc.edu. The ConnectCarolina team will contact you to explain the process and to help to determine if automation is feasible with your training management system.

Map of the Upload Process

The process you follow to upload training records in ConnectCarolina is:



About the Template

When you're uploading training records into ConnectCarolina, you have to use the template that is given to you. When you open the template, it may look like an ordinary Excel spreadsheet, but there are hidden columns and formatting that are important to getting the records into the system correctly. If you use your own spreadsheet, the upload won't be successful. Be sure not to rearrange columns or make any other changes to the template.

The template includes the following columns:

In this column:	Enter the following information:
EMPLID (Required)	Enter the employee's nine-digit PID. The PID must belong to a current or past UNC employee. Training records for affilliates (such as a University Temporary Services employee), a hospital employee, or contractor cannot be uploaded.
NAME (Optional)	Enter the employee's first and last name. This is not a required field, but it is helpful to have when troubleshooting an upload error.
COURSE START DT (Required)	The date entered must be valid and in the MM/DD/YYYY format. If you need to upload training enrollment (for example, future-dated training records), the attendance column needs to contain E for "enrolled" for each future-dated row. After the class has taken place, be sure to go into the system to mark their attendance, or you can upload a new file with their attendance information.

In this column:	Enter the following information:
COURSE CODE (Required)	Enter the course's code as it exists in ConnectCarolina (for example, HR0100).
SESSION Number (Optional)	Enter the course's four-digit session number as it exists in ConnectCarolina. The system uses the existing session number if it matches the course's start and end date. If there is no session number to match to, the system assigns it another session number. It does this in increments of ten. For example, if the existing session number is 0010, the system assigns the next session as 0020.
COURSE TITLE (Optional)	Enter the course's title as it appears in ConnectCarolina. This is not a required field, but it is helpful to have when troubleshooting upload errors.
COURSE END DT (Optional/Required)	This date must be a valid date entered in the MM/DD/YYYY format and must be the same date or a later date than the date in the COURSE START DT column. If the course is a multi-day course, this column becomes required.
ATTENDANCE (Optional)	If you leave this column blank, the system automatically fills in a C for "completed" when the training record is uploaded. All valid entries are: C (completed), D (employee cancelled), E (enrolled), I (incomplete), L (department cancelled), N (no show), S (session waitlist)
WAIT DT (Optional)	If the participant tried to register for a class but was waitlisted, you can enter the date they were waitlisted. If you enter a date, it must be greater than 01/01/1960.
COURSE GRADE (Optional)	Enter A,B,C,D,E,F, or if the class is pass/fail, enter FL (fail), or P (pass).

Tips for a Successful Upload

- The system can only upload 1,000 entries at a time (that is, you can only have 1,000 rows in a single upload).
- Uploaded PIDs must belong to current or past UNC employees or contingent workers (for example, an unpaid adjunct professor).
- There must be at least one existing session for the course you want to upload. The system automatically creates additional sessions as needed.

- If you need to correct errors, be sure to always correct them in the Excel Workbook file, not the CSV file.

It's Very Important to Double Check Your Files Before You Upload

Keep in mind that the larger your upload file becomes, the more important it is to double check that the information is correct before it's uploaded. As we mentioned earlier, you can upload up to 1,000 entries in a single upload, but if you are new to using this tool, it's recommended that you only upload 100 entries at a time. It's easier to troubleshoot errors on an upload with 100 entries vs. 1,000.

- If you have a successful upload but find that your information is incorrect (such as the course start date), you need to go into ConnectCarolina and make the changes directly in the system.

Example:

Let's say you've successfully uploaded a training record that said all of the participants completed class on a Tuesday but then you realize that participant Sally Smith actually completed it on Wednesday. When you change the date for Sally on your spreadsheet and re-upload the file, the system recognizes and accepts the new course date, but the system also still holds onto the old information. In other words, in ConnectCarolina it now looks like Sally has completed two courses, one on a Tuesday and one on a Wednesday. To correct this, you would go directly into the system and remove Sally from the Tuesday class manually.

It's important to remember that uploading files puts information into the system, but it doesn't make corrections. You need to go directly into the system to make any corrections.

- If you upload the same file twice, the system recognizes it as a duplicate file and nothing changes in the system. The email notification says "Upload Process Duplicate File".
- If you upload a file with the same name as an existing file, but some of the information is different, the different information gets uploaded into the system, and the rest remains the same.
- If you upload a file that has a different file name but the same information as a previously uploaded file, everything remains the same in the system and the email notification says "Upload Process Duplicate File".

Where to find the Upload Template

ccinfo.unc.edu > HR & Payroll tab > Working with Training Records > Managing Training > Download the Template

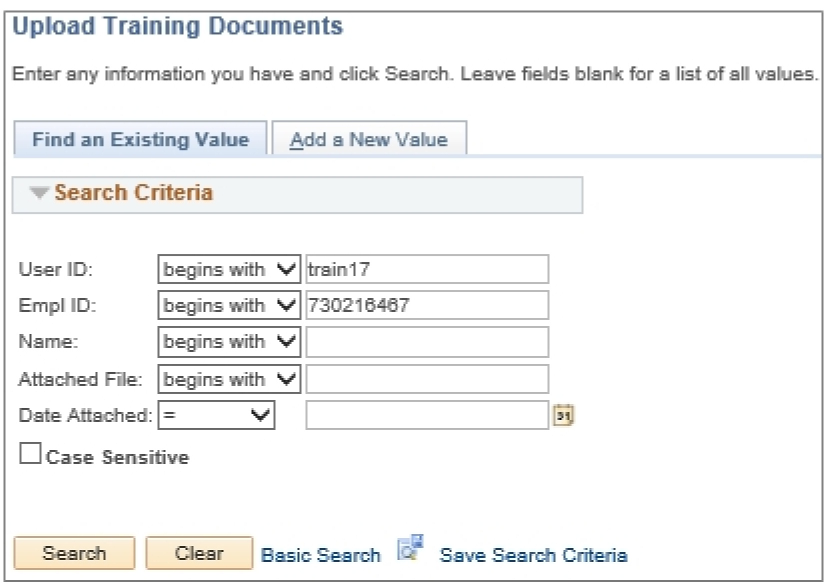
Uploading Training Records

Follow these steps to upload training:

1. Get the upload template from ccinfo.unc.edu.
2. Copy your training records into the template.
3. Double check that all your records look correct prior to uploading.
4. Save the template as an Excel Workbook, and then save again as a CSV (Comma delimited) file.
5. In ConnectCarolina, choose this menu option:

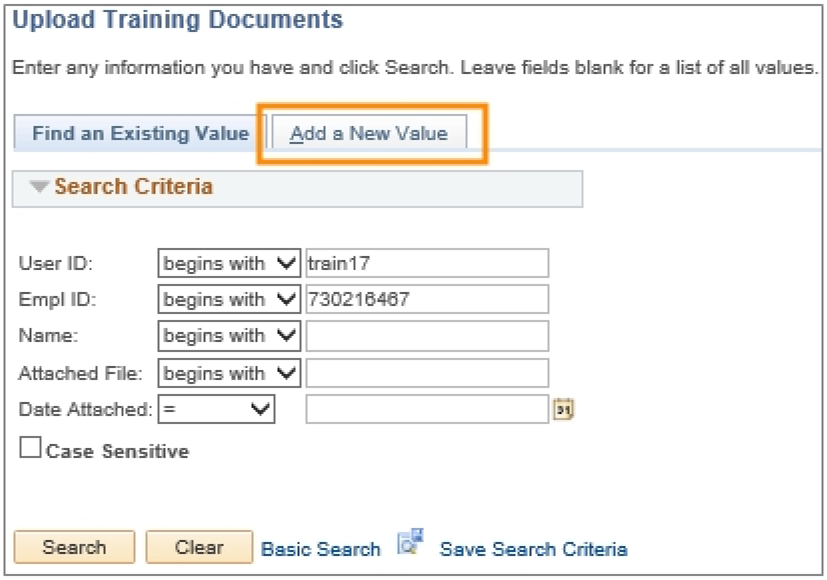
   Main Menu > HR/Payroll Menu > Administer Training > Upload Training Documents

   Result: The system displays the Upload Training Documents page with your user ID and PID automatically filled in.

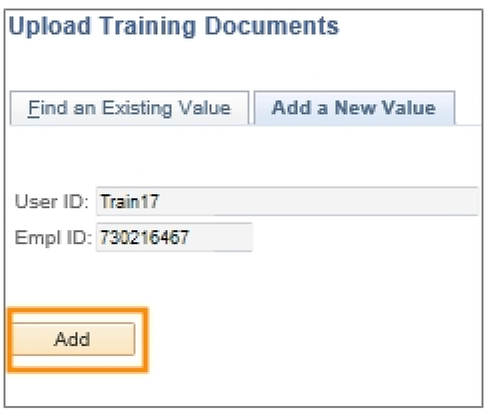
   

   Note: If you have already uploaded a training record (even just one time), press **Enter** and skip to step 8.

6. Click **Add a New Value**.

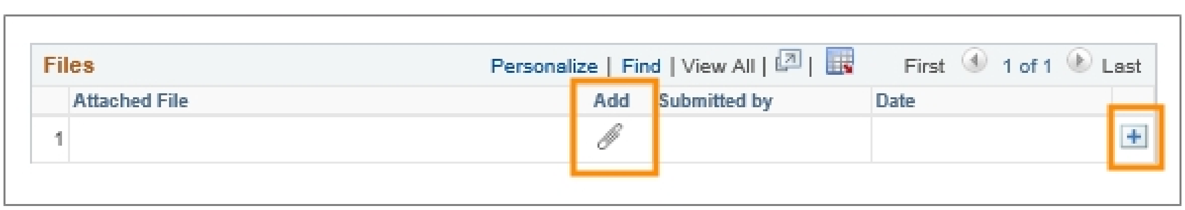


7. Click **Add**.

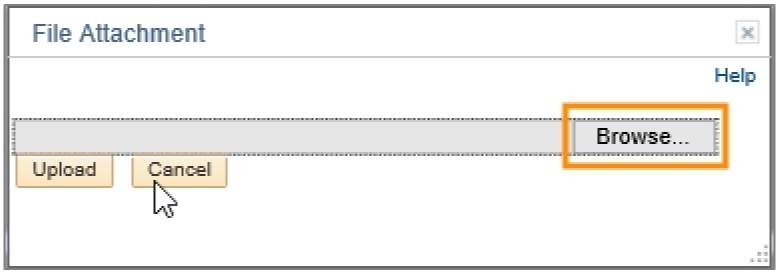


Result: The system displays the Upload Learning Management Files page.

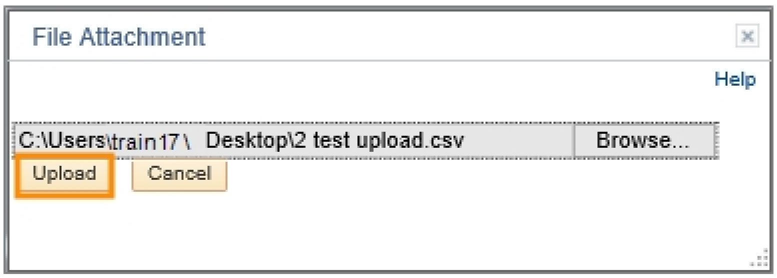
8. If you are uploading a file for the first time, click the **paper clip** icon. If you already have an existing file, click the **plus button** to add a new row, then the **paper clip** icon.



9. Click **Browse** and select the CSV file you want to upload.



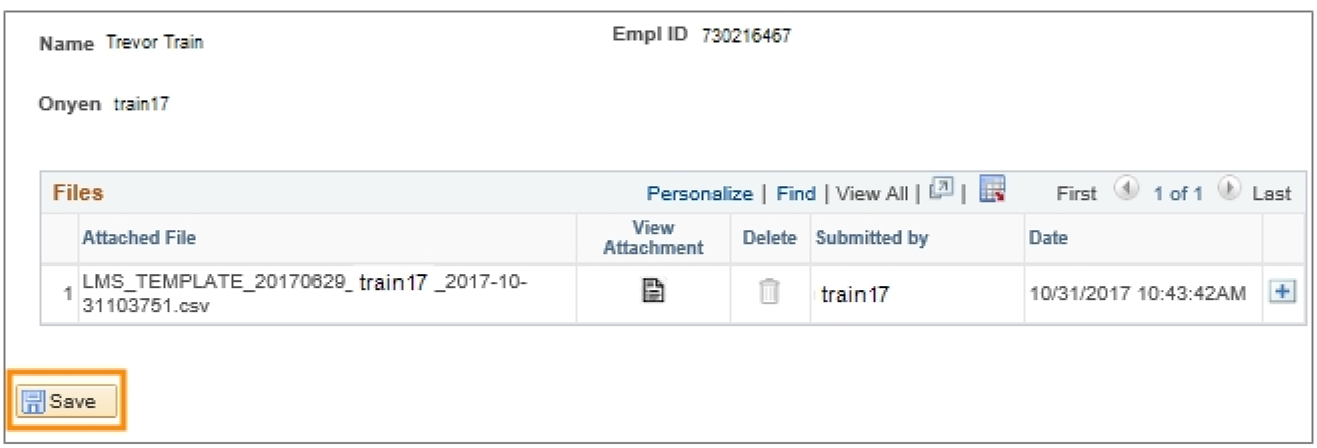
10. Click **Upload**.



Result: The system displays a message saying the upload was either succesful or failed. You also receive an email letting you know whether the upload failed or was successful.

11. Do one of the following:

- If your upload was successful, click **Save**.



Result: Your training records are in ConnectCarolina.

- If your upload was not successful, follow these steps:

  a. Review the errors in the email you received.

  b. Correct the errors in the Excel workbook (not the CSV file).

c. Save the Excel file as a new CSV file and repeat steps 8 through 11 until you have a successful upload.