



## To schedule a class:

Click on the Configuration icon. Choose the Class icon under Education Tracking.



## To see if the class already exists:

1. Click the Course Code box. A list appears on the right side. You can type the **course code** in the box once the list appears and go directly to the code on the right side.
2. Click the code on the right side.
3. Be sure to have the date range completed.
4. Then click **Search**.

## To create a new class:

1. Click the **Add** button on the left side.

The screenshot shows the 'Class Configuration' screen. On the left, there is a sidebar with 'Actions' (Add, Clear, Reset Criteria, Advanced) and 'Report Favorites'. The main area has a search form with fields for 'Course Code', 'Description', 'Start Date Range Begin' (09/19/2012), 'Start Date Range End' (10/03/2012), and 'Keywords'. A 'Search' button is at the bottom. On the right, a 'Field Look Up Values' table is displayed.

Code	Description
00000000	No Course - FOR TES
00000001	Testing Course
50MTG4-3	DRH Unit 4-3 Staff Me
50MTG5-1	DRH Unit 5-1 Staff Me
50MTG6S	DRH Endo Staff Meeti
50MTGNBN	DRH Nursery Staff Me
50MTGOR	DRH Operating Room
ABLS58	Advanced Burn Life Su
ABMT48	ABMT Skills Day 2010
ABMT49	ABMT Patient Flow Me
ABMT50	Phlebotomy Complete
ABMT51	Good Manufacturing F
ABMTT922	Adult Bone Marrow Tr
AC2116	2100 Skills Day for R

2. Click the **Course Code** box. A list appears on the right side. You can type the course code in the box once the list appears and go directly to the code on the right side.
3. Click the code on the right side.
4. Enter the Start Date, Start Time and End Time.

The screenshot shows the 'Class Configuration' screen with the 'Add' button highlighted. The 'Course Code' dropdown is open, showing a list of course codes. The 'Start Date' is set to 09/05/2012, 'Start Time' is 08:00, and 'End Time' is 16:00. The 'Status' is set to 'Restricted'. The 'Enrollment Method' is set to 'Immediate'. A 'Save' button is at the bottom.



5. Status:
  - Restricted (not seen for enrollment)
  - Limited (seen but cannot enroll)
  - Pending or Posted (seen and can enroll)
  - Cancel (class is cancelled)
6. Enrollment Method: Setting that determines whether employees are immediately enrolled in a class or an enrollment request is submitted that requires approval by an authorized user.

The following Enrollment Method options are available:

<b>Immediate</b>	All employees are immediately enrolled in the class without submitting a request.
<b>Need</b>	Employees who have a mandatory requirement for a course (based on education requirements) are immediately enrolled in the class without submitting a request.
	Employees who have a non-mandatory requirement for the course or no requirement are submitted as a request to enroll in the class. The request must be approved before the employee is enrolled in the class.
<b>Request</b>	All employees are submitted as a request to enroll in the class. The request must be approved before the employee is enrolled in the class.

7. Minimum enrollment: The minimum number of employees who should be registered for a class before it will be held. A blank field indicates there is no minimum enrollment required
8. Status comment: Any comments explaining the status field entry.
9. Summary: Free-form text field to enter more information, such as a more detailed description of this course.
10. Click **SAVE**.

You will see any Warning Messages at the top of the screen. The warning messages - Classroom Has Not Been Assigned or Instructor Has Not Been Assigned - will appear.

***You do not have to assign a classroom or instructor to schedule a class that occurred in the past. You can proceed to the instructions that begin with “To schedule a class...”***



Once the class is saved, you will see more options appear in the left column.

To add a Classroom:

Click **Classroom** button. Then click the **Add** button.

Click in the Affiliation box and choose Health System.

Search for a classroom using the **Description** box.



Once you select the classroom, click the **Assign Selected** button.

The screenshot shows the 'Class Navigator' interface. On the left, the 'Classroom Add Action' section has the 'Assign Selected' button highlighted with a red arrow. The main area shows search criteria: Code (checked), Affiliation\* (HEALTH SYSTEM, checked), and Description (drh, checked). A 'Search' button is below. Below the search bar, it says '7 items were found'. A table lists classrooms with checkboxes in the first column:

	Description	Capacity
<input type="checkbox"/>	DRH	50
<input checked="" type="checkbox"/>	DRH - Education Classroom	20
<input type="checkbox"/>	DRH Endo Area	40
<input type="checkbox"/>	DRH Nursery Unit	40
<input type="checkbox"/>	DRH Special Services Staff Room	30
<input type="checkbox"/>	DRH Staffing Office	25
<input type="checkbox"/>	DRH Workroom	5

To add an instructor, click the **Instructor** button.

The screenshot shows the 'Class Sections' interface. The 'Instructors' button is highlighted with a red arrow.

Click Add.

The screenshot shows the 'Class Sections' interface. The 'Add' button is highlighted with a red arrow. A warning message is displayed: 'Warning messages: Instructor Has Not Been Assigned'. Below the warning, there is a 'Filter Criteria' section with the text 'Instructors do not exist for this class'.

Search by last name. Check the box in front of instructor name. Click Assign Selected.

The screenshot shows the 'Class Navigator' interface. On the left, the 'Classroom Add Action' section has the 'Assign Selected' button highlighted with a red arrow. The main area shows search criteria: Last Name (mcpeek, checked), Code (checked), and First Name (checked). A 'Search' button is below. Below the search bar, it says '1 item was found'. A table lists employees with checkboxes in the first column:

	Last Name	First Name	Code	Login Name
<input checked="" type="checkbox"/>	MCPEEK	DEBORAH	100398	mcpee001@duke.edu



To **schedule the class**, click the Schedule button. This screen appears to confirm your data.

To save the class, click the Save button **IF you do not have attendees to add**.

The screenshot shows the 'Class Scheduler' interface. On the left, the 'Class Navigator' shows 'Class 1 of 1' and 'Class: 0000001 - Testing Course (01/01/2013)'. Below it, the 'Legend' and 'Class Sections' tabs are visible. The main area contains fields for 'Start Date\*' (01/01/2013), 'End Time\*' (16:00), and 'Start Time\*' (08:00). A red arrow points to the 'Save' button. Below these fields is a grid showing time slots from 02:00 to 17:00. The row for 'DRH-EducationCI' is highlighted in green, and the row for 'DEBORAH MCPHEE' is highlighted in orange.

To add attendees, click the **Attendees** button. Then click the **Add** button.

The screenshot shows the 'Actions' menu. The 'Add' button is highlighted with a red arrow. The 'Add Request' button is also visible.

Click the **Advanced** button.

The screenshot shows the 'Advanced' search interface. The 'Advanced' button is highlighted with a red arrow. The interface includes fields for 'Last Name' and 'First Name', and a 'Search' button.

From this screen, you can select one employee using **last name or Login Number**.



## Clinical Education & Professional Development Duke University Health System



Enter your Employee search criteria:

General	Labor Distribution	Classification
Last Name		Login Number
First Name		Login Name
Middle Name		Hire Date
Legal Name		Termination Date
Preferred Name		Badge Number
Title		Badge Library Code
Employee Status		Directory Service Name
Code		Show Terminated Employees

To select from your department, click the **Labor Distribution** tab and click in the **Affiliation** box. Select **Health System** from the right side. Click in the **Facility** box and select the correct Facility from the list on the right side. Click in the **API Dept** and type your department number once the list on the right side populates. Click **Search**.

Enter your Employee search criteria:

General	Labor Distribution	Classification
Code		Skill Code
Position Code		Grade Code
Job Class Code		Affiliation
Pay Group Code		Facility
Employee Category Code		Senior Executive (CNO-CFO-COO)
Employee Class Code		Vice President
Shift Code		Clinical Service Unit
Seniority Code		API Dept
Payroll Group Code		Sub Unit
Union Code		Approved Hours
Status Code		Daily Hours

Search

2040 HEALTH INFORMATION MANAGEMENT  
2041 DHTS APPLICATION DEVELOPMENT  
2042 DHTS ANCILLARY IS  
2043 DHTS INFORMATION SECURITY  
2044 HEALTH INFORMATION - C  
2045 TUMOR REGISTRY  
2046 CHIEF NURSING OFFICE  
2048 AOO-MED/SURG/CRT CA  
2050 HOSPITAL EDUCATION &...  
2052 ADVANCE PRACTICE NUR  
2053 CASE MANAGEMENT PRC  
2054 HOSP ADM SYSTEMS & N  
PAYROLL  
2055 AOO-ONCOLOGY SERVIC  
2056 INFORMATION SYSTEMS  
2057 TRANSPLANT COORDINA  
2058 SUPPORT ADMIN  
2060 FOOD COURT SOUTH  
2061 RANKIN FOOD SERVICE  
2062 2L PROSTATE CLINIC  
2065 LAUNDRY SERVICES  
2097 MORRIS, CR3  
2098 HOSPITAL SOUTH, HART  
2101 BIO-MEDICAL WASTE PRO  
2103 HANES HOUSE  
2104 ENVIRONMENTAL SERVIC  
SUPPORT  
2105 BAKER HOUSE  
2127 REHAB UNIT SUPPORT  
2128 PSYCH UNITS SUPPORT  
2129 ADULT REHABILITATION  
2130 WILLIAMS  
2131 THREE PART

\*\*\*\*\*Once the search finishes, put a check mark beside the employees you wish to add to the class



Once you have selected all the attendees, click a folder with the + sign on it. This screen appears.

Click **Schedule** on the right side. Once the confirmation screen appears, **click SAVE**

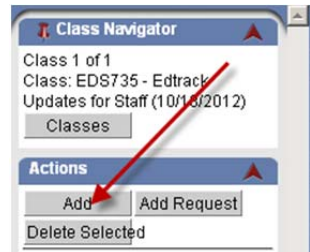
[illegible]



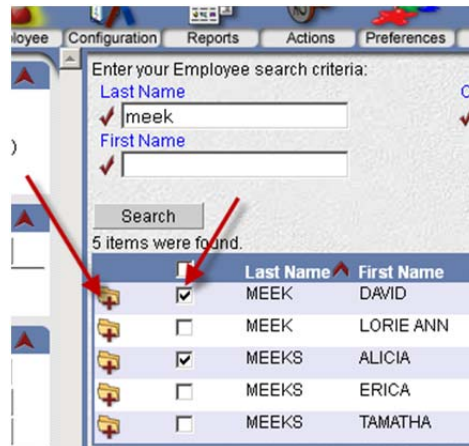
### To add employees to existing class:

Search for the class. Click the folder to open the class.

Click Attendees. Click Add



1. Search for the employee.
2. Once you find the employee, place a checkmark in the box.
3. Continue searching for the employees to enroll in the class.
4. Once you have all the employees selected, **click the folder with the “+” sign** (any of the folders). This will add the employee/s to the class.





## Transaction Entry (committing a class)

Click the Configuration icon.

Search for the Class you need to commit. Search for the Course Code and enter the date of the class – Begin and End Date Range. Click Search

Enter your Class search criteria:

Course Code	Start Date Range Begin
✓ EDS735	✓ 10/22/2012
Description	Start Date Range End
	✓ 10/22/2012
	Keywords

Search

Once the list of classes appears, click the folder beside the class you need to commit. When the General class screen appears, check to make sure you have the right class. Then click **Transaction Entry**.

**Class Navigator**

Class 1 of 1  
Class: EDS735 - Edtrack  
Updates for Staff (10/22/2012)

Classes

**Actions**

Replicate

**Class Sections**

General Attendees  
Classrooms Instructors  
Reports Resources

Schedule

Transaction Entry

**Report Favorites**

Report Favorites do not exist.

**Warning Messages**

Instructor Is Instructor Of Other Class: DEBOI

**Informational Messages**

Class Validation Warning: Maximum Enrollment the applied capacity.  
Enrollee Calendar: GARY BARROW-WEST

**General** Audits

Course Code  
EDS735

Description  
Edtrack Updates for Staff

Start Date  
10/22/2012

Start Time  
13:30

End Time  
15:00

Status  
Posted

Status Comment

Change **Overwrite** to Yes on the next screen. Then click the **Next** button under the Class Transaction Wizard.

Home Quick Badge Employee Configuration Reports Actions Preferences Help Log Out

**Class Navigator**

Class 1 of 1  
Class: EDS735 - Edtrack  
Updates for Staff (10/22/2012)

Classes

**Class Transaction Wizard**

Back Next Cancel

Start Date  
10/22/2012

Start Time  
13:30

End Time  
15:00

Classroom(s)  
DurhamRegionalC2

Instructor(s)  
DEBORAH MCPEEK

Overwrite  
✓ Yes



You will see a list of employees who registered for the class. **To add Walk-ins**, search for an employee using the search criteria on the page.

Enter your Employee search criteria:

Last Name  Code

First Name

6 items are currently selected.

<input checked="" type="checkbox"/>	Last Name	First Name	Code	Login Name	Employee
<input checked="" type="checkbox"/>	ARTAC	JANET	56996	JCS6@duke.edu	A
<input checked="" type="checkbox"/>	BARROW-WEST	GARY	296735	GB5@duke.edu	A
<input checked="" type="checkbox"/>	DRUMWRIGHT	MARGARET	288865	DRUMWRMA@duke.edu	A
<input checked="" type="checkbox"/>	LEWIS	DAWNE	109986	LEWIS022@duke.edu	A
<input checked="" type="checkbox"/>	RIGSBEE	DENISE	336727	RIGSB022@duke.edu	A
<input checked="" type="checkbox"/>	WARD	NATALIE	436679	NW13@duke.edu	A

Once the employee name appears, put a **Checkmark in the box** beside the employee name. You will do this step for each employee that was a **walk-in and did not register**.

Enter your Employee search criteria:

Last Name  Code

First Name

1 item was found. 6 items are currently selected.

<input type="checkbox"/>	Last Name	First Name	Code	Login Name	Employee
<input checked="" type="checkbox"/>	ARTAC	JANET	56996	JCS6@duke.edu	A
<input checked="" type="checkbox"/>	ARTAC	JANET	56996	JCS6@duke.edu	A
<input checked="" type="checkbox"/>	BARROW-WEST	GARY	296735	GB5@duke.edu	A
<input checked="" type="checkbox"/>	DRUMWRIGHT	MARGARET	288865	DRUMWRMA@duke.edu	A
<input checked="" type="checkbox"/>	LEWIS	DAWNE	109986	LEWIS022@duke.edu	A
<input checked="" type="checkbox"/>	RIGSBEE	DENISE	336727	RIGSB022@duke.edu	A
<input checked="" type="checkbox"/>	WARD	NATALIE	436679	NW13@duke.edu	A

Once you have added all the walk-ins, click the **Next** button under **Class Transaction Wizard**.



Once the next screen appears, you can change the Transaction Status if needed and the Attendance Status if needed.

JANET ARTAC	
Transaction Status*	Hours
<input type="text" value="P"/>	<input type="text" value="0.00"/>
Attendance Status*	Cost
<input type="text" value="P"/>	<input type="text" value="0.00"/>
Score	
<input type="text"/>	
Credits	
<input type="text" value="0.00"/>	

### Transaction Status:

Code	Description
C	Canceled
F	Failed
I	Incomplete
NS	No Show
P	Passed
W	Withdrawn

### Use only the following:

Incomplete = may have attended class but did not successfully complete a test or demonstration

No Show = did not attend the class and did not notify appropriate department/person.

Passed = Attended or Passed a test

Withdraw = Withdrew from the class or called and withdrew due to having to staff unit/illness

### Attendance Status:

Present = attended the class

Not Present = did not attend – was a No Show or Withdrawn

Click **Finish**.

**You will receive an email with a pdf report that you have completed a Transaction Entry. Please print the pdf report and attach to roster as confirmation the transaction was completed.**