To schedule a class:

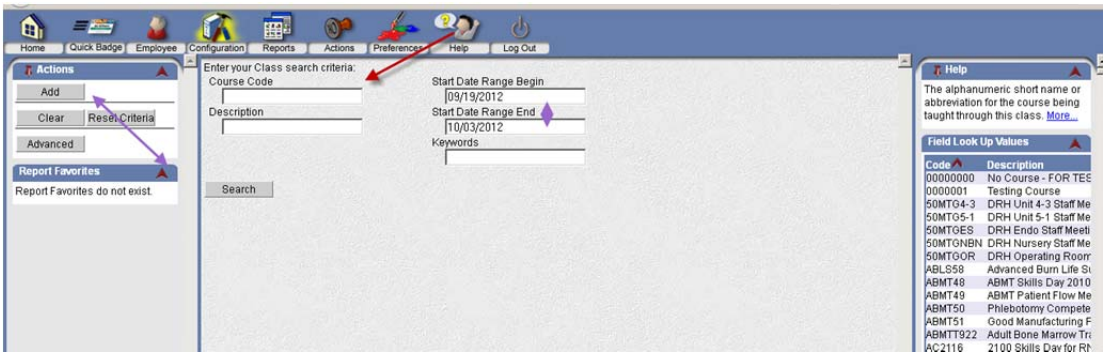
Click on the Configuration icon. Choose the Class icon under Education Tracking.

To see if the class already exists:

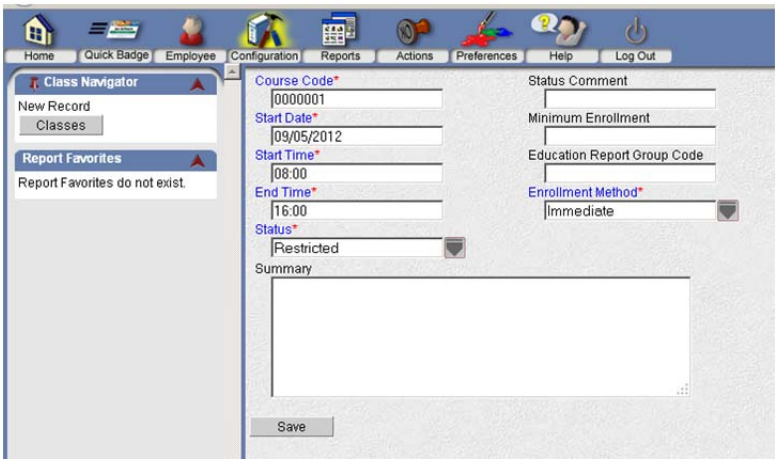
1. Click the Course Code box. A list appears on the right side. You can type the **course code** in the box once the list appears and go directly to the code on the right side.
2. Click the code on the right side.
3. Be sure to have the date range completed.
4. Then click **Search.**

To create a new class:

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



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.



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:

Immediate	All employees are immediately enrolled in the class without submitting a request.
Need	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.
Request	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.

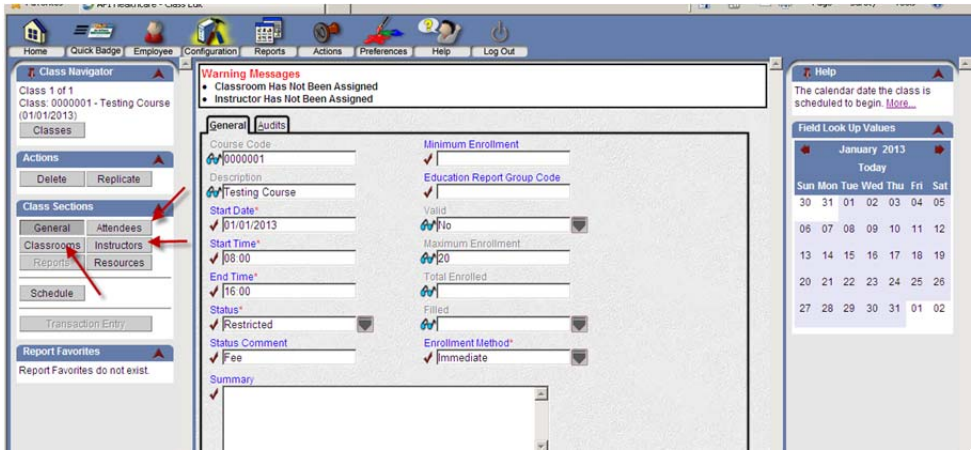
7. Minimum enrollment: The minimum number of employees who should be registered for a class before it will be held. A blank field indicates there is no minimum enrollment required

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.

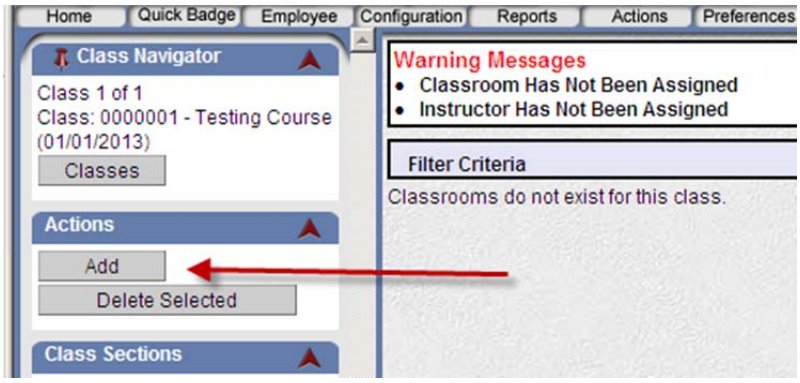
You do not have to assign a classroom or instructor to schedule a class that occurred in the past. You can proceed to the instructions that begin with "To schedule a class…"

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

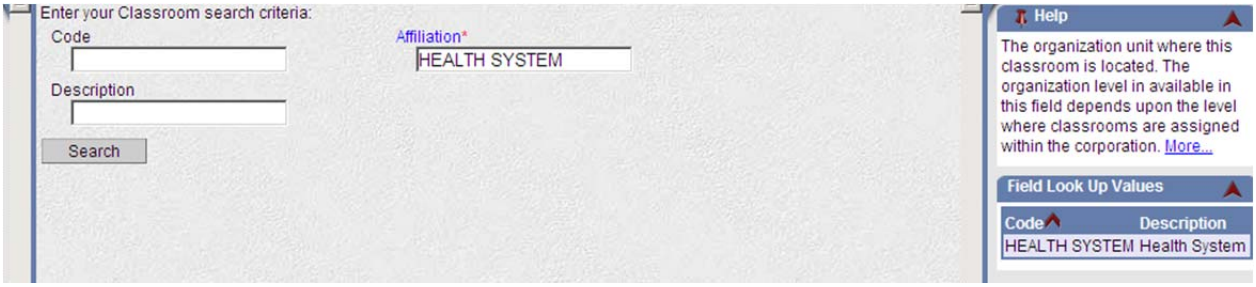


To add a Classroom:

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

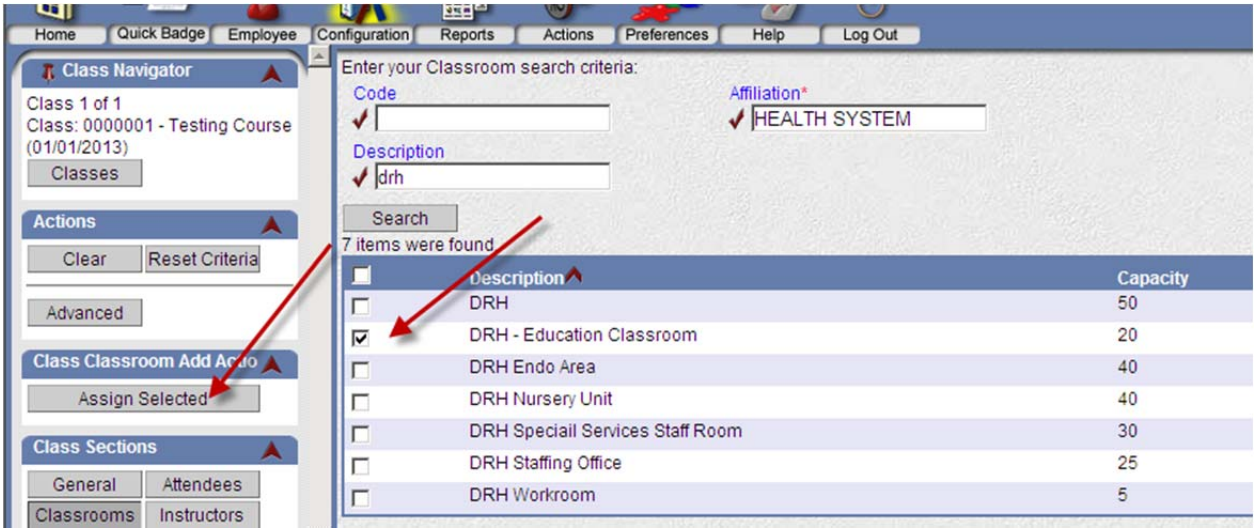


Click in the Affiliation box and choose Health System.



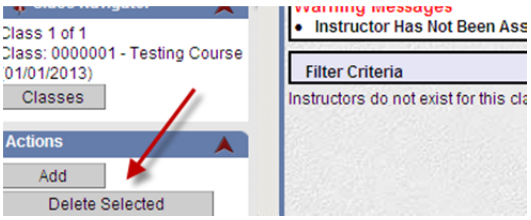
Search for a classroom using the **Description** box.

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

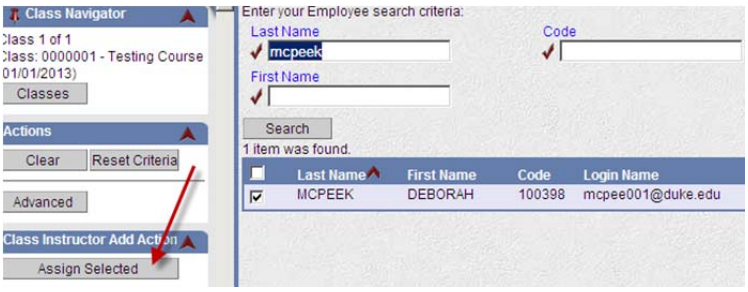


To add an instructor, click the **Instructor** button.

Click Add.

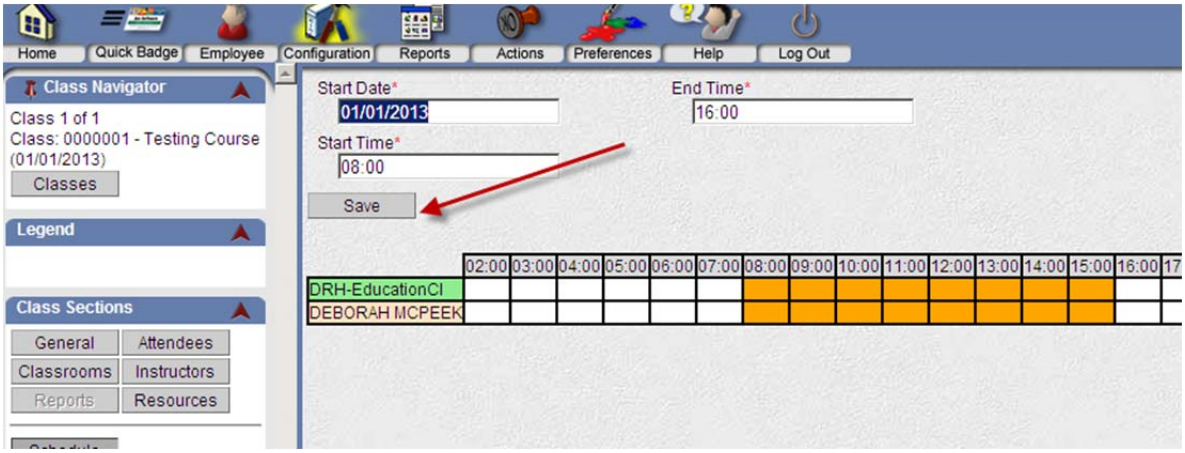


Search by last name. Check the box in front of instructor name. Click Assign Selected.

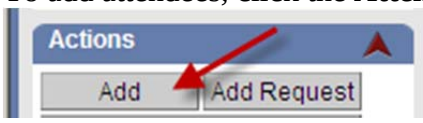


To schedule the class, click the Schedule button. This screen appears to confirm your data.

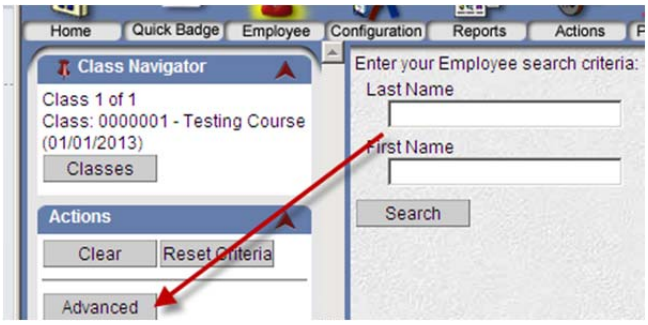
To save the class, click the Save button **IF you do not have attendees to add**.



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

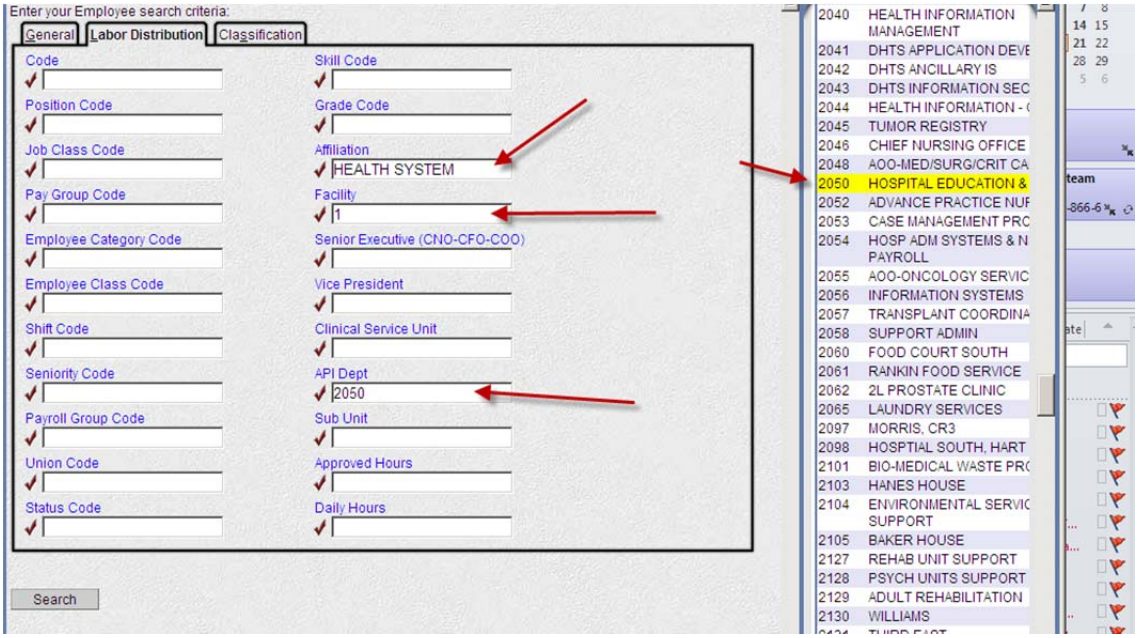


Click the **Advanced** button.

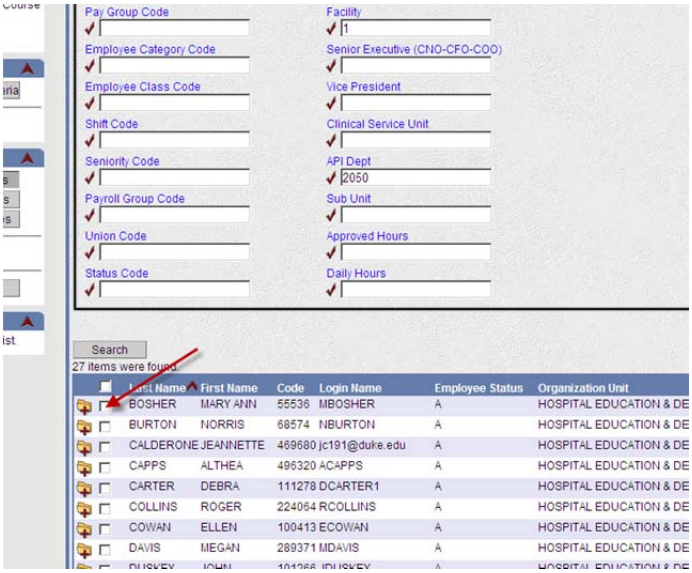


From this screen, you can select one employee using **last name or Login Number.**

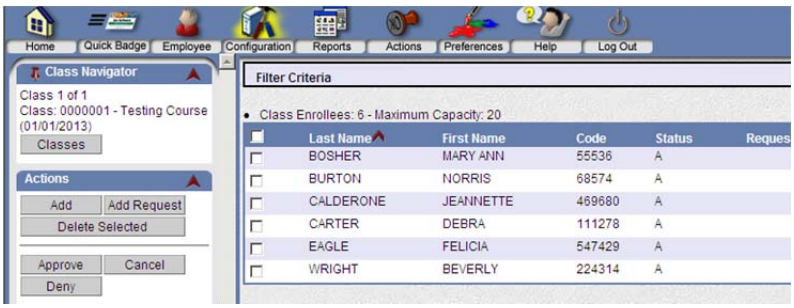
To select from your department, click **the Labor Distribution** tab and click in the **Affiliation** box. Select **Health System** from the right side. Click in the **Facility** box and select the correct Facility from the list on the right side. Click in the **API Dept** and type your department number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



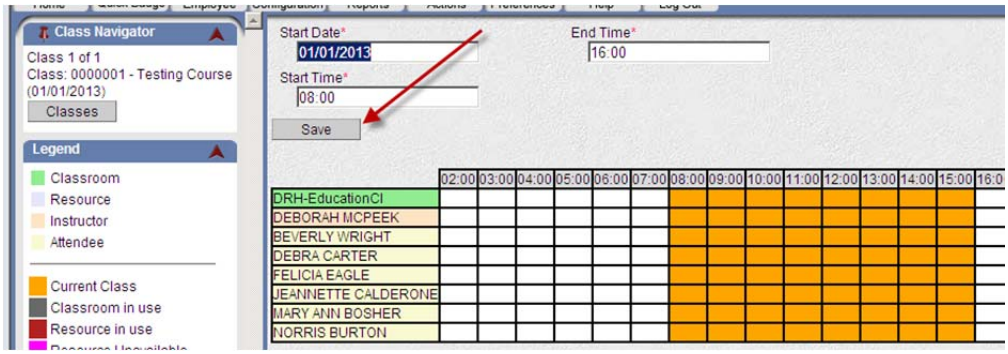
*******Once the search finishes, put a check mark beside the employees you wish to add to the class**



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



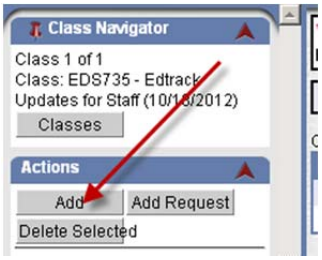
Click Schedule on the right side. Once the confirmation screen appears, **click SAVE**



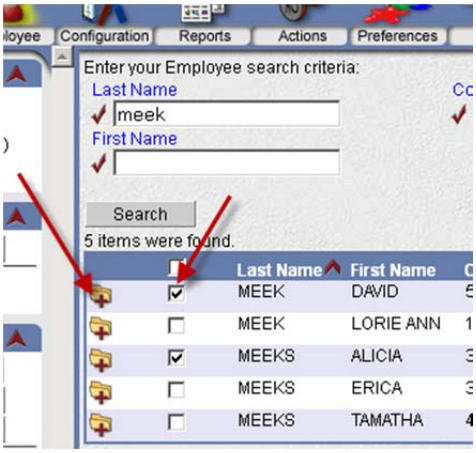
To add employees to existing class:

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

Click Attendees. Click Add



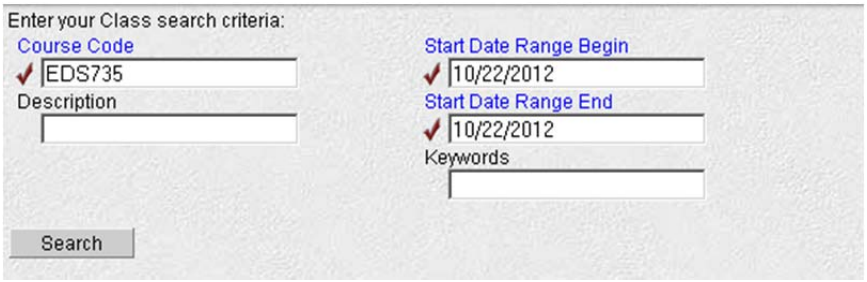
1. Search for the employee.
2. Once you find the employee, place a checkmark in the box.
3. Continue searching for the employees to enroll in the class.
4. Once you have all the employees selected, **click the folder with the "+" sign** (any of the folders). This will add the employee/s to the class.



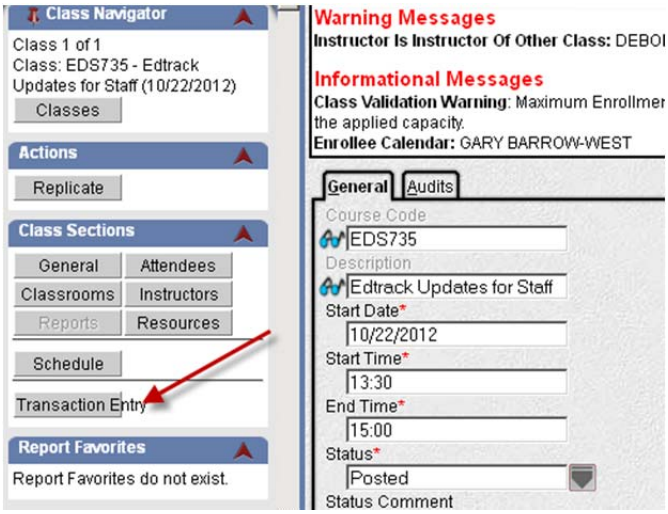
Transaction Entry (committing a class)

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

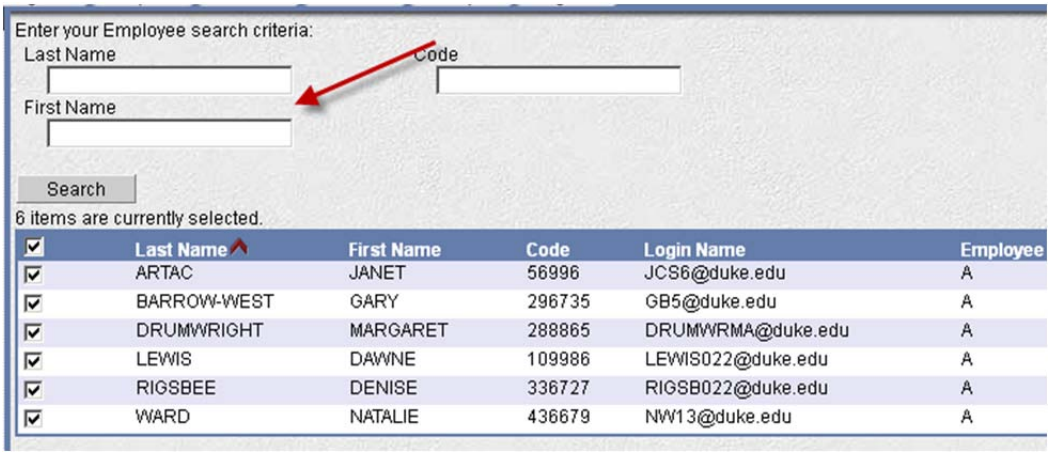


Once the list of classes appears, click the folder beside the class you need to commit. When the General class screen appears, check to make sure you have the right class. Then click **Transaction Entry**.

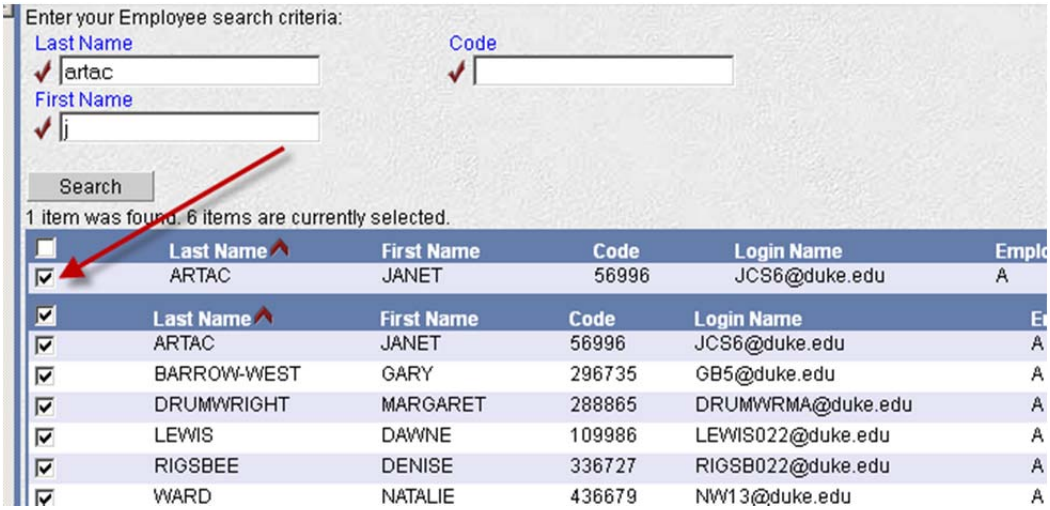


Change **Overwrite** to Yes on the next screen. Then click the **Next** button under the Class Transaction Wizard.

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.

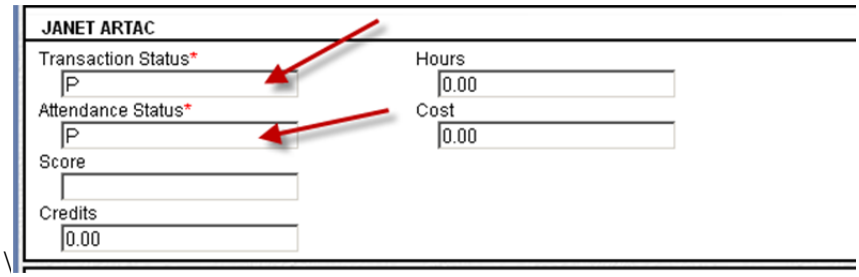


Once the employee name appears, put a **Checkmark in the box** beside the employee name. You will do this step for each employee that was a **walk-in and did not register.**



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.



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.