



SUNGARD

BI-TECH

IFAS

Notice

SUNGARD BI-TECH LLC MAKES NO REPRESENTATIONS OR WARRANTIES, ORAL OR WRITTEN, EXPRESS OR IMPLIED, WITH RESPECT TO THE SYSTEM, SERVICES, SOFTWARE, DOCUMENTATION, OPERATING ENVIRONMENT, ANY OTHER SOFTWARE OR SERVICES PROVIDED HEREUNDER OR ANY OTHER MATTER ADDRESSED HEREUNDER, AND SUNGARD BI-TECH LLC EXPLICITLY DISCLAIMS ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING THE IMPLIED WARRANTIES OF TITLE, MERCHANTABILITY AND FITNESS FOR A SPECIFIC PURPOSE. SunGard Bi-Tech LLC shall not be liable for errors contained herein or for incidental or consequential damages in connection with the furnishing, performance or use of this material. This documentation is proprietary and confidential information of SunGard Bi-Tech LLC. Copying, reproduction or distribution is strictly prohibited. All right reserved.

Copyright © 2007 by
SunGard Bi-Tech LLC
890 Fortress Street
Chico, CA 95973

Should you wish to make a comment, or if you find an error in the text, please contact us via email:
doc@bi-tech.com

Contents

Professional Development User Guide

| | |
|---|----|
| 1. Overview | 5 |
| 1.1 Introduction | 5 |
| 1.2 Key Features | 6 |
| 1.3 Getting Started | 8 |
| 1.4 Flow Diagram | 9 |
| 1.5 Component of Employee Online..... | 10 |
| 2. Setup | 11 |
| 2.1 Basics | 11 |
| 2.2 Intermediate | 12 |
| 2.3 Advanced | 14 |
| 2.4 Best Practices | 14 |
| 3. Processes..... | 15 |
| 3.1 Tutorial #1 - Course Definition and Activation | 15 |
| 3.2 Tutorial #2 - Registration and Course Completion..... | 17 |
| 3.3 Tutorial #3 – Participant Drop Course | 18 |
| 4. Process Reference | 18 |
| 4.1 Entry..... | 18 |
| 4.2 Reports..... | 62 |
| 5. Troubleshooting..... | 62 |
| 6. Advanced / Special Configuration | 62 |
| 7. Module Integration..... | 62 |
| 7.1 Posting | 62 |
| 7.2 Security | 62 |
| 8. Implementation..... | 63 |
| 8.1 Dependencies | 63 |
| 8.2 Template Project Plan | 63 |
| 8.3 Agenda's | 64 |
| 8.4 Consulting Objectives..... | 66 |
| 9. FAQ..... | 66 |

Professional Development User Guide

1. Overview

1.1 Introduction

Create and manage staff education programs via the Web with the Professional Development (PD) module. Once course detail is setup, end users enjoy 24x7 access to registration, class schedules, a personal record of completed coursework, etc. Automating these tasks reduces your organization's administrative burden immediately. In addition to creating organization efficiency, Professional Development promotes and facilitates an increasingly educated workforce within your organization. Along with staff participation, an optional feature allows non-employees to register and participate in all scheduled courses. Access to information is straightforward and easy. Professional Development (PD) includes standard reports and immediate online inquiry to any data in the system. Security-protected reports can be run at the user's networked computer or via the Internet from selected Web browsers.

1.1.1 Primary Users

There are three primary users of this module; Administrators, Instructors, Participants. The Administrative function is focused on the setup and scheduling of courses, cost identification (if any) plus definition and/or authorization of course instructors and participants. Instructors may optionally identify the details associated with their courses such as: syllabus, materials, pre-requisites, min/max students, attendance, participant evaluations/grades, etc. Participants register for courses, indicate method of payment (if required), and completion of instructor/course evaluation if requested.

1.1.2 Organization of Screens

The Administrative function is performed within the IFAS 7i environment. It is accessed through the HRPDUP (Human Resources, Professional Development, Update PD Database) menu mask. The following update functions are available:

- CC – Course Codes – User defined codes that support reporting and system checking processes (described later in this document).
- CD – Course Definition – Allows access to all details in relation to defining or updating active or future/proposed courses.
- CH – Course History – Provides the ability to view and/or update historical individual participant and course detail information.

The Instructors' access is provided through the Employee Online (EO) module via web access. The following functions are available:

Current Courses – Displays a one line summary of each Course that has not been completed by the individual Instructor. A link to Course Details is provided for reference purposes.

Prior Courses – Displays a one line summary of Courses that have been previously taught by the Instructor. A link to Course Details is provided for reference purposes.

Course Definition – Provides the ability to update Course Details for currently active courses and to define new, future Courses (if this capability is defined within the security setup).

Course Attendance – Allows the instructor access to individual Participants within a selected course to update their attendance for a given date and time.

Assign Grades – Allows the Instructor to assign grades to individual Participants within a selected course.

Email Notification – Provides the ability for the Instructor to email all Participants regarding any updated information related to a specific course.

Attachments – Allows the Instructor to upload documents and attach them to their Instructor personal information record. Examples might be a resumé/vita, professional references, credentials/certifications, etc.

The Participants' access is provided through the Employee Online (EO) module via web access. The following functions are available:

Browse Courses – Provides search capability to view selected or all Courses currently scheduled.

Current Enrollment – Displays a one line summary of the Course(s) in which the Participant is currently enrolled and active. Links are provided to Course details, Instructor information, Evaluation (if completed) and ability to Drop Course.

Prior Enrollment – Displays a one line summary of previous courses completed. Links are provided to Course details, Instructor information and the ability to print their completion certificate One-Time.

Wait List – Lists any courses for which the Participant is currently on the Wait List and their position on the List.

Personal Information – Displays the current Name, Address, Phone and Email information on file for the Participant and provides the ability to edit that information (if this capability is defined within the security setup)

1.2 Key Features

1.2.1 Setup/Configuration

- Define facilities and training locations.
- Define course begin/end dates offered within calendar or fiscal year.

- Define course information and associated class data including course code, description, class size, location, instructor, facilitator, required materials, prerequisites, etc.
- Upload and attach a full course syllabus in any document format.
- Allow instructors to track participant attendance online.
- Option to collect participant feedback through a class/instructor evaluation questionnaire.
- The organization must define at least one (1) 'Attachment Type' for documents to be attached to the Instructor information.
- User defined Course Completion Certificate.
- User defined email text for Course Registration and Wait List Confirmations.

1.2.2 End User Features

- View class schedules online. Open links to additional detail, including course description, facility, date/times, class size/availability, etc.
- Drop existing classes and/or register for new classes.
- View an online history of the classes that you've attended. Each successfully completed course has a link to print a certificate.

Background Features

- Limit access to screens and reports via IFAS security.
- Prevent or allow participants from registering for the same course multiple times.
- Automate pre-requisites checking.
- Automate registration and facility date/time conflict checking. If a course is full, the registrant is placed on a waiting list and an e-mail notification is generated indicating their position on the list. Wait listed registrations are automatically filled when a vacancy becomes available on a first in, first out basis with an e-mail notification to the registrant.
- Optional billing process for course fees; Email notification via Workflow of fees charged; Automatic deductions through IFAS Payroll; Billing statements and payments through IFAS Accounts Receivable and Cash Receipts.

1.2.3 Standard Reports

All Standard Reports are provided in the IFAS standard Click, Drag and Drill (CDD) format. They are designed to be used as delivered or individually customized using the CDD Design Tool. Additional, client specific reports may be written to meet local requirements and standards. The CDD reports provided upon installation are:

- Course Attendance Roster
- Participant Transcript
- Course Information
- With Drill Down to: Syllabus, Schedule, Registrations, Pre-Requisites
- Course Summary
- Course Registration Report

In addition, each Professional Development screen may be individually printed from within the module.

1.3 Getting Started

Prior to beginning the Professional Development setup process it may be helpful to consider the following items:

- Current Course Naming and Numbering conventions (if available) and their fit within the Professional Development structure.
- Any special policies or rules in relation to course pre-requisites.
- Identify where a course or a series of courses lead to completion of a specific requirement or certification.
- Identify selected courses which have costs associated with them that are either paid by the Participant or charged to internal accounts. Identify the account(s) used to record the associated income/revenue.
- Determine if there is a need to associate courses with topical or professional ‘areas’ of study for tracking and analysis purposes.
- Determine if Instructor/Course Evaluations will be processed on-line. If so, begin to identify the standard questions used plus any course specific questions that may apply.
- Prepare a list of Class Locations.
- Define the electronic Course Completion Certificate format based on the sample format information provided (requires either internal or SunGard Bi-Tech technical support).
- Define the email text for Course Registration and Wait List confirmations.

From an IFAS Security perspective, determine if you will allow:

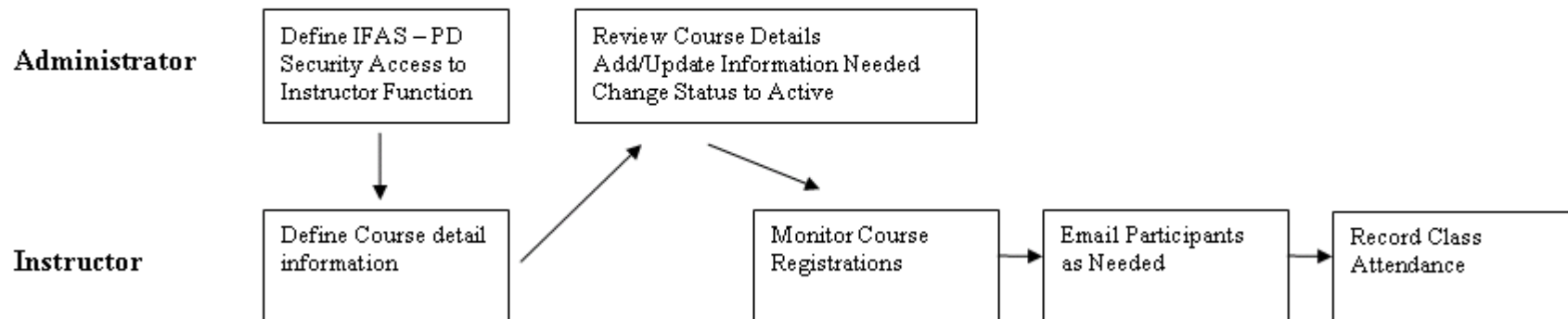
- Multiple individuals to perform the Administrator’s function.
- Instructors to have the ability to define Courses which are then reviewed and approved/rejected by the Administrator.
- Participants to Edit their Personal Information.
- Non-employees allowed to access Professional Development, enter their Personal Information and Register for courses.

Consider the requirements needed for IFAS Workflow functionality:

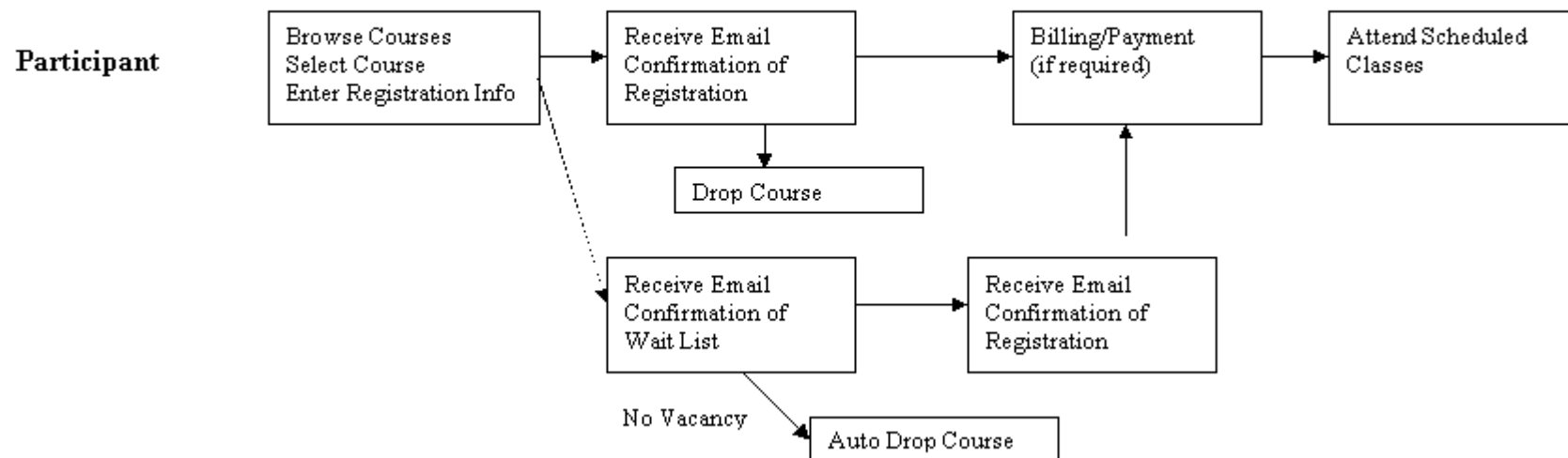
- When a course is defined, will it be reviewed and/or approved by one or more individuals prior to the Administrator marking it as ‘Active’? If so, identify the course, position and action taken process to be expected for each of these circumstances.
- Should all email communication from the Instructor to Participants also be directed to an administrative position outside of the instructor and participants in the course?
- To whom should ‘Wait List’ notifications be sent?

1.4 Flow Diagram

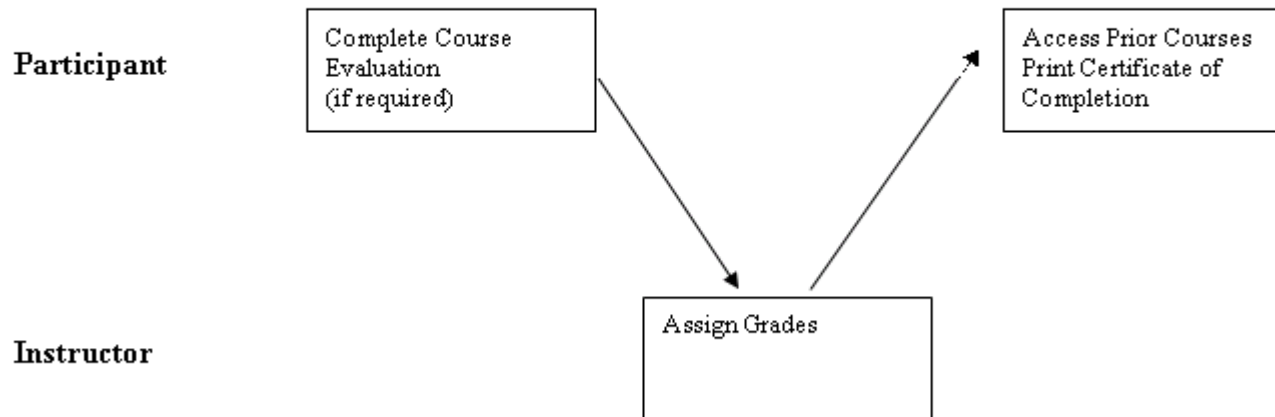
Course Definition/Management (Decentralized)



Course Registration



Course Completion



1.5 Component of Employee Online

Professional Development is an optional component within the IFAS Web-based Employee Online module. Individual employees may review/adjust personal and payroll information as well as follow their progress in meeting professional development and training goals utilizing this module. All of these functions allow access through one portal on a 24x7 basis.

2. Setup

2.1 Basics

2.1.1 Terms and Definitions

General

Employee Online abbreviation – EO – Refers to the EO web based processes

Professional Development abbreviation – PD – Refers to the PD processes found within Employee Online (EO)

Workflow – Refers to the IFAS method for automating internal routing of approval requests/email notification of pending or completed items.

CDD – Refers to the IFAS ‘Click, Drag and Drill’ reporting tool which provides system standard reports and user defined, custom reporting

7i – Refers to the data entry screen methodology within the IFAS online environment.

Professional Development

Administrator – Refers to one or more individuals who are responsible for managing the organizational professional development process including the instructor and participant relationship.

Instructor – An individual who teaches courses within the organizations’ professional development system.

Participant – Any individual who registers for scheduled professional development courses.

Course – Identifies an individual subject of study which will be taught over a specified period of time.

Class – Identifies individual dates and times across which a Course will be taught.

2.1.2 Concepts

The basic design of the PD module assumes that the organization utilizing its feature and functionality desires a decentralized, 24x7 process that is accessible by employees and potentially non-employees, regardless of time or location. As such, use of the system within this perspective requires internet access, an email account and individuals who are familiar with standard web-based methods.

In addition, due to the web-based nature of this product, a vast majority of the communication between the Administrator, Instructors and Participants is email based. This is especially true in regard to the Administrator role to receive notification from Instructors to review, approve and activate course activity via the IFAS Workflow models.

IFAS Security is an important element in planning a successful implementation of the PD module. Various individual processes are dependent upon a clear understanding of Who does What and to Whom does it flow to for review and approval. This needs to be coordinated carefully with the available processes within the Instructor and Participant menus.

2.2 Intermediate

2.2.1 Initial Configuration

To access the Professional Development portal, security must be established in the form of a specific User ID record in NUUPUS with an Association Code of either “PDPART”, “PDINST”, or both. This signifies that the user is a Participant and/or Instructor, and the appropriate PD options will appear when accessing the PD portal. Employees must have a User ID (i.e. NUUPUS) to access the PD system, along with the appropriate “PDPART” and/or “PDINST” association.

When non-employee users access the Professional Development portal they can request the creation of an account. The workflow model that routes the approval of the new user account can then create the user automatically. Creation of the new user account does require some defaults which are noted in a common code:

| | |
|-----------------------|--|
| Code Category: | PDUS |
| Code Value: | DEFAULTS |
| Medium Desc: | Used to describe the common code (i.e. “Prof Dev User Defaults”) |
| Assoc Code (1): | Location Code (i.e. “ONSITE”) |
| Assoc Code (2): | Manager Code (i.e. “DBA”) |
| Assoc Code (3): | Hours Code (i.e. “@@”) |

Location Codes that are attached to PD courses must first be defined in Person Entity, using the PEUPPE mask. This allows for not only a location description (PE Name field), but also provides address, contact, etc. The requirement for locations in PEUPPE is that one of the PE

Select Codes is flagged with the value “PDLCTN”. That is the value that restricts which PE entries are listed when looking up a Location in PD.

2.2.2 Workflow

All base Workflow models that are delivered with PD do not use specific email addresses. In cases where a PD Administrator approval is necessary, the workflow model looks for a user with a “PDADMIN” workflow role. In 7.9, the NUUPUS screen can be used to view/assign workflow roles to a specific user. It is best to use the Administrative Console, which not only provides a plug-in to assign workflow roles to users (i.e., “PDADMIN”), but it also provides the plug-in to define the “PDADMIN” workflow role (the “Manage Workflow Groups” plug-in), which is also a setup requirement.

The Workflow models installed are:

Non-Employee Participant PD login approval and Verification Email

WF Model = PROFDEVSIGNUP

Instructor Course Definition to Administrator for review/approval & Notify Instructor Course Active

WF Model = PD_COURSE_INSR

Instructor Email Notification to Participants

WF Model = PD_INS_REGMAIL

Course Registration, Drop Course and Wait List processing, and confirmation emails to Participants

WF Model = PD_REGDTL_UPD

Check Authorization for Participant to Print Certificate of Completion

WF Model = PD_CERT_PRINT

2.2.3 Email Notifications

Email notifications for employees are generated by definition of an email address within the Human Resources Employee Master (HRUPEM) screen when the IFAS HR module has been implemented. Where the IFAS HR module is not in use, email addresses must be defined within the employee Person/Entity (PEUPPE) record.

2.2.4 Certificate of Completion

The Certificate of Completion is available to be printed on a one-time basis by each Participant upon successful completion of each course. The format of the Certificate is custom for each client site. The customization may be performed by SunGard Bi-Tech as a part of the Professional Services included with this module or may be a client task if they are familiar with '.jpg' and '.aspx' files. The module provides for one standard format to be designed and used by all Courses. However, through the printing process each Participant receives an individualized certificate which includes the following information:

Participant Name

Course Title

Date of Completion

Instructor's Name

The 'jpg' and 'aspx' files perform the following functions:

certificate.jpg – fixed graphics for the border

certi.jpg – specialized text and fonts

line.jpg – line drawing needed for underlining text

certificate.aspx – combines all of the jpg parts and the Participant/Course information to create the final Certificate

2.3 Advanced

The 7.9.0 Beta version provides for email notification of a registration or dropped course to the person responsible for processing payments or refunds to Participants. The 7.9.0 General Release will provide multiple options for automated billing and refund processing within IFAS.

2.4 Best Practices

Decentralized vs. Centralized Course Definitions

The first decision in implementing Professional Development is to identify whether Instructors will have the ability to create their own Course Definitions rather than assigning this task to the PD Administrator. As described in the Flow Diagram above, Instructors may create the initial Course Definition. However, the Administrator always retains the ability to review and edit the information prior to any Course becoming

active and available. This is an important decision point since all Workflow rules and subsequent communication decisions flow from either a decentralized or centralized process management perspective.

A positive aspect associated with decentralizing Course Definitions is that the Instructor is able to provide as much detail and preference to the specific information listed in the Course Definition as they feel is necessary for prospective Participants. Through this, the PD Administrator reduces the time required to gather, verify and enter all of the individual Course Details. This increases the time available for managing Course processes and communication with current/potential Instructors and Participants. On the other hand, centralizing the Course Definition function ensures overall consistency in the descriptive text, pre-requisites, etc. that are provided and ensures organizational standards are always met.

Using Area, Category, Requirement and Pre-Requisite Definitions

The degree to which an organization utilizes the user defined code structures is in direct relationship to the number and complexity of Courses which are offered. In an organization where meeting multiple, sometimes competing certification requirements such as; local, state and/or federal, the ability to associate clear links and groupings which are displayed on the Course Information, directly assist Participants in making Course selection decisions and understanding where they fit within their overall professional development program. However, by taking this approach, the Administrator must create a code structure that is well organized and can be easily associated with the varied type and levels of the courses offered. For organizations that do not have strict requirements, the Area code option may be the best approach. This will allow a Course to be associated with multiple ‘areas’ of study. Also, Course lists may be grouped by Area code to assist Participants in selecting Courses that meet specific development needs. In either case, spending a little time in reviewing the need and planning for use of these Course codes prior to implementation will ease the long-term management of the process.

3. Processes

3.1 Tutorial #1 - Course Definition and Activation

The following is a basic outline of the expected steps for Course Definition and Activation processes. Each organization may define variations based on their policies and procedures. Two different scenarios are provided. First, the course definition/proposal process is **Decentralized** and originates with the Instructor, then moved to an ‘Active’ status by the Administrator. Second, the course definition and ‘activation’ process is **Centralized** with the Administrator.

Decentralized:**a) Instructor**

1. Login as the individual course Instructor through Employee Online (see EO documentation for login requirements)
2. Access the Professional Development 'Course Definition' process within Employee Online
3. Define and Save Course Details, Class Dates/Times and Pre-requisites (if applicable)
4. Course is automatically created with an 'Inactive' status by the system
5. Workflow and Email notifications are immediately sent to the Administrator

b) Administrator

1. Login as the Administrator through Employee Online (see EO documentation for login requirements)
2. Access within the 7i menu or Dashboard, HRPDUPCD – Course Definition
3. Review and/or Adjust any information defined by the Instructor
4. Add any of the following information/tracking items: Requirements Met, Additional Costs and Area
5. Approve the Workflow task, which will Change the Status from 'Inactive' to 'Active'

Information is immediately listed with the 'Current Courses' information in Employee Online, Professional Development for both the Instructor and Participants.

Centralized**a) Administrator**

1. Login as the Administrator through Employee Online (see EO documentation for login requirements)
2. Access HRPDUPCD – Course Definition
3. Define Course Details, Class Dates/Times and Pre-Requisites (if applicable)
4. Add any of the following information/tracking items: Requirements Met, Additional Costs and Area
5. Define Status as 'Active'

Information is immediately listed with the 'Current Courses' information in Employee Online, Professional Development for both the Instructor and Participants.

3.2 Tutorial #2 - Registration and Course Completion

The following is an outline of the expected steps for the Registration and Course Completion processes. All registration and course completion processes are accessed through Employee Online via the web.

Participant (registration)

1. Login as the individual course Participant through Employee Online (see EO documentation login requirements)
2. Select 'Browse Courses'
3. Utilize the Selection Criteria or Search All active courses
4. Review displayed list of currently active courses
5. Select desired 'Course Title'
6. Review information and Register
7. Select 'I meet the Pre-requisites for this course' (if applicable, the system will automatically check the Participant's course history for all defined pre-requisites and determine eligibility)
8. Select 'I agree to pay course fees' and Method of Payment (if applicable)
9. Print the Registration Confirmation receipt

A confirmation page will be presented to the user along with an email notification automatically sent to the Participant confirming their registration and status (Enrolled or Wait List). (At the client's option an email may be sent simultaneously to the Instructor)

Instructor (during the course)

1. Login as the individual course Instructor through Employee Online (see EO documentation for login requirements)
2. Record Attendance
3. Select 'Course Attendance', then select desired Course 'Class Date/Time'
4. Select 'Attendance' for the specific Date/Time and Record Attendance
5. Assign Grades upon course completion (if required)
6. Access the Professional Development module within Employee Online
7. Select 'Assign Grades' and enter information for each Participant

Participant (course completion)

1. Select 'Current Enrollment'
2. Select the desired Course and 'Evaluation' link to complete the Instructor/Course Evaluation survey process
3. Select 'Prior Enrollment'
4. Select the desired Course, Review Grade and Print Certificate

3.3 Tutorial #3 – Participant Drop Course

The following is an outline of the expected steps for a Participant to drop a course. All course related processes are accessed through Employee Online via the web.

Participant

1. Login as the individual course Participant through Employee Online (see EO documentation for login requirements)
2. Select 'Current Enrollment'
3. Identify the Course to be dropped and click on 'Drop Course'
4. The user will be presented with the selected Course details and asked to confirm the 'drop course' option
5. Print the Course, Drop Course Confirmation page

4. Process Reference

4.1 Entry

The following section displays each of the individual data entry screens from the perspective of the primary audience expected to access and/or utilize the information. It also assumes that the reader is familiar with the general features and functionality of IFAS 7i Data Entry processes. For additional information on 7i Screen processing please refer to the IFAS 7i General User Guide.

Within the Professional Development module not all screens are required. The various options and items to consider for implementation will be briefly described. For a more detailed description of each field on a screen, please refer to the IFAS online Help Documentation.

4.1.1 Administrator

The following screens are accessed from within the 7i menus or a defined Dashboard tab. As described earlier, if the organization is using a decentralized approach to Course definition, the first three screens, Course Definition, Class Dates/Times and Pre-Requisites will be completed by the Instructor and only need to be reviewed and/or adjusted.

HRPDUPCD – Human Resources – Professional Development – Update PD Database – Course Definition

Course Definition – Required

This is the primary screen for each individual Course Definition details. Course Name and Course ID definitions will define the list order within which a specific course will be presented for the various Instructor and Participant selection processes. Consistency in defining these

fields across many courses will help to ensure that similar courses or a course series will be grouped together. All information, with the exception of Account #, is presented to the Participant when viewing any details related to an individual course.

As with all 7i Screens, the Attachments panel provides the opportunity to attach a document for 'Documents Online' and/or 'Threaded Text' to the details of a specific course. These may be items such as; non-published materials used in the course, locations for materials purchases, organizational policies related to confidentiality, copyright laws, etc.

The 'Status' field indicates whether a Course is 'Active' or 'Inactive'. By placing a course in an 'Active' status it will automatically be listed and available for Participant viewing and registration.

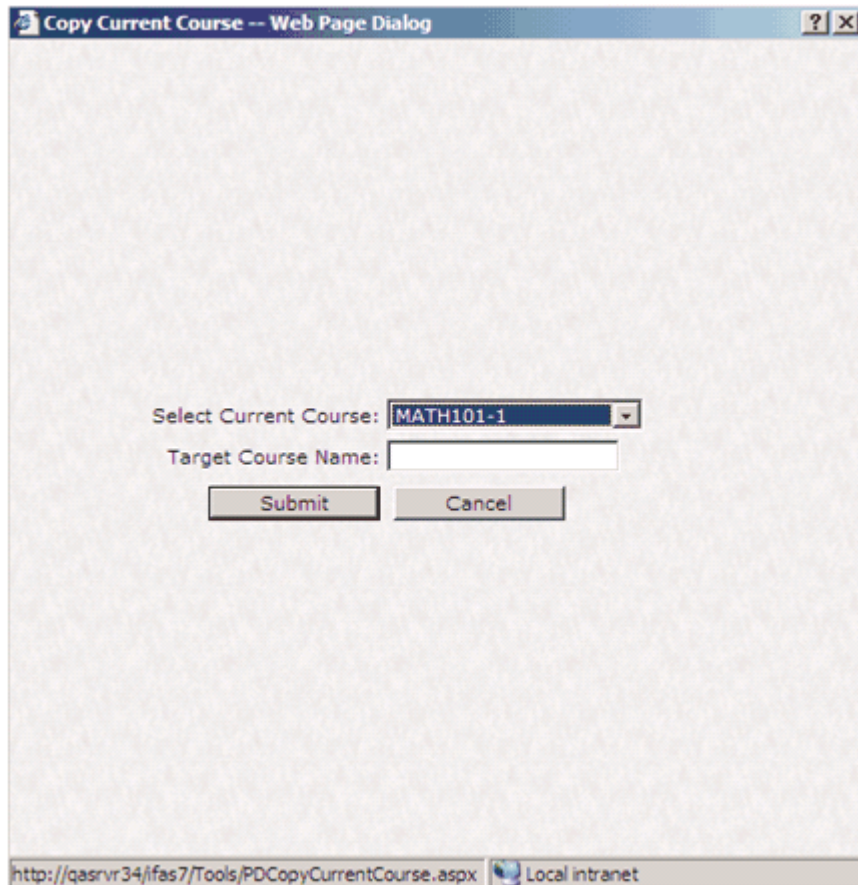
The 'Min' and 'Max Participant' fields allow the module to dynamically check the current 'Count' of registrations each time a new Participant attempts to register for the course. Once the 'Max Participant' count has been reached, all other registrations will be placed on a 'Wait List'. Each time a 'Confirmed' registration drops the course the next Participant on the Wait List is automatically Confirmed in the course and an email is sent via Workflow indicating their change in status. Likewise, if it is determined that the organization can increase the number of Participants in a course, the module will issue a confirmation for the next Participant(s) until the maximum is reached or there are no longer individuals on the Wait List, whichever occurs first.

The account number entered into this screen should represent the Revenue/Income account for any fees charged to the Participants. The ‘Additional Costs’ tab, discussed later, allows for the definition of GL/JL Expense accounts for charging costs such as; facilities, materials, instructor, etc. associated with the Course. The account number field utilizes all of the same characteristics as found in other account selection fields. The Job Ledger may also be used and associated with any given course.

The screenshot shows a web browser window titled "HRPDUPCD - Course Definition - SunGard Bi-Tech - Modtst34 - Microsoft Internet Explorer". The interface includes a navigation menu on the left with options like "Favorites", "Links", "Workflow", "Attachments", and "Tools". The main content area is titled "Course Definition" and contains several tabs: "Class Dates / Times", "PreRequisites", "Requirements Met", "Additional Costs", "Area", "Registration", and "Evaluation Questions". The "Additional Costs" tab is currently selected. The form fields include: "Course Name", "Course ID", "Status" (dropdown), "Title", "Instructor" (with a selection icon), "Description" (text area), "Start Date" and "End Date" (dropdowns), "Min Participants" and "Max Participants" (text boxes with "0"), "Count" (text box with "0"), "Location" (with a selection icon), "Room" (text box), "Schedule" (text box), "Materials" (text area), "Pre-Requisites" (text area), "Account #" (with dropdowns for "GL", "KEY", and "OBJ"), "Participant Cost" (text box with "0.00"), "Credits" (text box with "0.0"), "Credit Date" (dropdown), and "Seat Hours" (text box with "0.0"). At the bottom left, there are "Reports" and "Entity List" buttons.

Two Tools are provided to ease the data entry process for defining repetitive or similar courses.

The Copy Course tool allows the user to copy all details in one course to create a new course with a different 'Course Name' as shown below. Once the user clicks on 'Submit' the new course is created and may then be adjusted for any information changes.



The screenshot shows a web browser window titled "Copy Current Course -- Web Page Dialog". The main content area contains a form with the following elements:

- A label "Select Current Course:" followed by a dropdown menu showing "MATH101-1".
- A label "Target Course Name:" followed by an empty text input field.
- Two buttons: "Submit" and "Cancel".

The status bar at the bottom of the browser window displays the URL "http://qasrvr34/ifs7/Tools/PDCopyCurrentCourse.aspx" and "Local intranet".

The 'Move Course' tool removes the details from a selected course and moves those details to another, existing course.

Class Dates/Times – Required

This screen has two sections below the Course Name header information. First, is the area where multiple date, start time, duration (in minutes) and alternate location are defined for as many times that the course will meet. Second, is the listing of Participant Attendance

information for a highlighted date/time. While attendance information may be entered in this screen by the Administrator, it is anticipated that most attendance records will be entered by the Instructor within the attendance process provided via the web.

Course Name:
Course ID:
Status:

Title:

Instructor:

Course Definition

Class Dates / Times

PreRequisites

Requirements Met

Additional Costs

Area

Registration

Evaluation Questions

| Date | Time | Duration | Alternate Location |
|------|------|----------|--------------------|
| | | 0 | |

◀ ▶ + - 🔒
Add Mode 🔒

Attendance

| Participant ID | Participant Name | Comment |
|----------------|------------------|---------|
| | | |

Pre-Requisites – Optional

If the Course being defined has specific pre-requisite course requirements, they are entered here. There is virtually no limit for the number of courses which may be assigned as pre-requisites. However, they must be courses previously defined in the Course Definition screen which have either an 'Active' or 'Inactive' status. When a course has defined pre-requisites, these will be automatically checked against a Participants' course history to ensure they meet the current requirements.

| Course Name: | <input type="text"/> | Course ID: | <input type="text"/> | Status: | <input type="text"/> | | |
|----------------------|----------------------|---------------|----------------------|------------------|----------------------|--------------|----------------------|
| Title: | <input type="text"/> | | | | | | |
| Instructor: | <input type="text"/> | | | | | | |
| Course Definition | Class Dates / Times | PreRequisites | Requirements Met | Additional Costs | Area | Registration | Evaluation Questions |
| Course Name | Course Title | | | | | | |
| <input type="text"/> | | | | | | | |

Requirements Met – Optional

If an individual course fulfills the requirements for one or more certifications, performance based incentives or other organizational related development, the defined requirement code(s) are entered in this screen. For instance, if a specific course such as ‘Early Childhood Development Refresher’ meets both District and State certification requirements, a separate code for District and State would be listed. The ‘Requirements Codes’ are entered through the HRPDUPCC – Course Codes process, defined later in this section. By utilizing these codes, analysis can be performed on the availability of courses and/or numbers of participants working toward these requirements.

| Course Name: | <input type="text"/> | Course ID: | <input type="text"/> | Status: | <input type="text"/> | | |
|----------------------|-------------------------|---------------|----------------------|------------------|----------------------|--------------|----------------------|
| Title: | <input type="text"/> | | | | | | |
| Instructor: | <input type="text"/> | | | | | | |
| Course Definition | Class Dates / Times | PreRequisites | Requirements Met | Additional Costs | Area | Registration | Evaluation Questions |
| Requirement Code | Requirement Description | Comment | | | | | |
| <input type="text"/> | | | | | | | |

Additional Costs – Optional

If there are specific costs associated with providing this course, they may be entered on this screen. These may be related to facilities, materials and supplies, instructor payments, etc. These may be charged against both GL and JL sides. The ‘Cost Codes’ are entered through the HRPDUPCC – Course Codes process, defined later in this section. This information is not presented to either the instructor or participants; only to an administrator. The values and accounts entered into this area are used for INFORMATIONAL PURPOSES ONLY. There is NO POSTING process to the Financial or Personnel modules in IFAS.

| Course Name: | <input type="text"/> | Course ID: | <input type="text"/> | Status: | <input type="button" value="v"/> | | |
|----------------------------------|-----------------------|---------------|----------------------|------------------|----------------------------------|--------------|----------------------|
| Title: | <input type="text"/> | | | | | | |
| Instructor: | <input type="text"/> | | | | | | |
| Course Definition | Class Dates / Times | PreRequisites | Requirements Met | Additional Costs | Area | Registration | Evaluation Questions |
| Cost Code | Cost Code Description | Amount | | Account | | | |
| <input type="button" value="v"/> | | | | GL | - | | |

Area – Optional

If the organization is interested in tracking courses that fall within certain ‘Area(s)’ of study these codes may be entered on this screen. For instance the course ‘Using Computers in the Classroom 101’ may fall within areas such as Elementary Education, Computer Education and/or General Classroom Techniques. By associating the related codes, with this course, individuals may extract a wealth of information on both the Course and Participant level in relation to level of usage or availability. Additionally, participants may use the ‘Area’ code as selection criteria when browsing for specific types of courses. The ‘Area Codes’ are entered through the HRPDUPCC – Course Codes process, defined later in this section.

| Course Name: | <input type="text"/> | Course ID: | <input type="text"/> | Status: | <input type="text"/> | | |
|----------------------|----------------------|---------------|----------------------|------------------|----------------------|--------------|----------------------|
| Title: | <input type="text"/> | | | | | | |
| Instructor: | <input type="text"/> | | | | | | |
| Course Definition | Class Dates / Times | PreRequisites | Requirements Met | Additional Costs | Area | Registration | Evaluation Questions |
| Area Code | Area DESC | | | | | | |
| <input type="text"/> | | | | | | | |

Registration – Information Only or History Adjustments

The Registration screen is designed to provide a view of all Participants currently associated with the selected Course, regardless of ‘Status’. Changes, Additions or Deletions to this information should only be entered when a problem has occurred with Participant access to the system or detail registration information needs to be adjusted outside of the regular Registration process.

One special reason for accessing this information is when an individual has previously printed a Course Certificate and needs to have it reprinted. In this case, the Administrator can place a check mark in the 'Certificate Available' field and the Participant will be able to reprint their individual certificate one time.

| Course Name: | <input type="text"/> | Course ID: | <input type="text"/> | Status: | <input type="text"/> | | |
|-------------------|----------------------|---------------|----------------------|------------------|----------------------|-------------------------------------|------------------------|
| Title: | <input type="text"/> | | | | | | |
| Instructor: | <input type="text"/> | | | | | | |
| Course Definition | Class Dates / Times | PreRequisites | Requirements Met | Additional Costs | Area | Registration | Evaluation Questions |
| Participant ID | Participant Name | Date | Time | Status | Grade | Certificate Available | Certificate Print Date |
| | | | | | | <input checked="" type="checkbox"/> | |

Evaluation Questions – Optional

This screen associates the Evaluation Questions from the user defined library of available questions with the selected Course. The 'Evaluation Questions' are entered through the HRPDUPCC – Course Codes process, defined later in this section.

This screen has two sections below the Course Name header information. First, is the area within which to select the Evaluation Questions that will be presented to the Participant upon course completion. When selecting a question, the Administrator must identify the order in which the question will be presented. Questions may be 'Y/N', Scale with Min/Max values or Text. Second, once a Course has been completed this section will display a listing of all Participant 'Question Responses' to the highlighted question.

| | | | | | |
|--------------|----------------------|------------|----------------------|---------|----------------------|
| Course Name: | <input type="text"/> | Course ID: | <input type="text"/> | Status: | <input type="text"/> |
| Title: | <input type="text"/> | | | | |
| Instructor: | <input type="text"/> | | | | |

| Course Definition | Class Dates / Times | PreRequisites | Requirements Met | Additional Costs | Area | Registration | Evaluation Questions |
|-------------------|---------------------|---------------|------------------|------------------|------|--------------|----------------------|
| Order | Question | Question Text | | | | | |
| 0 | | | | | | | |

Navigation: < > + - Add Mode

| Question Responses | | | |
|--------------------|--------|--------|----------|
| Participant | Rating | Yes/No | Response |
| | 0 | | |

HRPDUPCC – Human Resources – Professional Development – Update PD Database – Course Codes

The purpose of these screens are to define the master table of various codes that can be used in the Course Definition process described above.

Category Codes – Optional

The Category and Requirement Codes define levels of certification, performance based incentives or other organizational related development goals. As described above in the Course Definition screen, one or more 'Requirement Code(s)' may be associated with a Course to identify that it fully or partially fulfills the 'Requirement'.

Category Codes are associated with Requirement Codes. They provide a higher level of summary reporting and may be associated with multiple Requirement Codes.

| Category Codes | Requirement Codes | Cost Codes | Area Codes | Evaluation Questions |
|----------------|-----------------------------|------------|------------|----------------------|
| Category Code | Description | | | |
| DIST | District Level Requirements | | | |
| FED | Federal Level Requirements | | | |
| STATE | State Level Requirements | | | |
| | | | | |

Requirement Codes - Optional

Requirement Codes define specific levels of certification, performance based incentives or other organizational related development goals. As described above in the Course Definition screen, one or more 'Requirement Code(s)' may be associated with a Course to identify that it fully or partially fulfills the 'Requirement'. A 'Requirement Code' may be associated with only one Category Code.

| Category Codes | | Requirement Codes | Cost Codes | Area Codes | Evaluation Questions |
|------------------|----------|------------------------|------------|------------|----------------------|
| Requirement Code | Category | Description | | | |
| DISTREQ1 | DIST | District Requirement 1 | | | |
| FEDREQ1 | FED | Federal Requirement 1 | | | |
| P1 | DIST | Principal Approval | | | |
| STTREQ1 | STATE | State Requirement 1 | | | |
| | | | | | |

Cost Codes – Optional

Cost Codes define the different types of 'Additional Costs' which may be entered on the Course Definition screen.

| Category Codes | | Requirement Codes | Cost Codes | Area Codes | Evaluation Questions |
|----------------|-----------------|-------------------|------------|------------|----------------------|
| Cost Code | Description | | | | |
| FAC | Facility Cost | | | | |
| INST | Instructor Cost | | | | |
| | | | | | |

Area Codes – Optional

Area Codes provide a method of tracking courses that fall within certain functional areas of study.

| Area Code | Description |
|-----------|-----------------------------|
| CERT | General Certifications |
| CP | Computer Programming |
| CS | Computer Skills |
| GEN1 | Required General Ed Level 1 |
| MATH | Mathematics |
| | |

Evaluation Questions – Optional

This screen provides the ability to create a library of Course/Instructor Evaluation Questions which can be selected and associated with a specific Course. Each evaluation question must have a Question ID. It may be helpful to create Question ID's that group similar types of questions together so that they can be easily viewed and selected on the Course Definition screen. When selecting a Question ID on the Course Definition – Evaluation Questions screen, the Administrator will be able to determine the 'Order' in which the question will be presented within the Participant Course Evaluation process.

Each question text is limited to 250 characters. When writing a question, please keep in mind the Participant audience who will be responding to each question. Each question may be one (1) of the three (3) different Response Types available:

1. 'N' Numeric Rating that has a Low to High scale defined.
2. 'T' Text response which provides for written narrative responses from the Participant.
3. 'Y' Yes/No response

| Category Codes | Requirement Codes | Cost Codes | Area Codes | Evaluation Questions |
|---|-------------------|------------|------------|----------------------|
| Question ID: <input type="text" value="EVALQA01"/> | | | | |
| Question: <input type="text" value="What would you change about this course?"/> | | | | |
| Response Type: <input type="text" value="T"/> | | | | |
| Low Rating: <input type="text" value="0"/> | | | | |
| High Rating: <input type="text" value="0"/> | | | | |

HRPDUPCH – Human Resources – Professional Development – Update PD Database - Course History

The purpose of these two screens are to provide the ability to view and/or update historical individual participant and course detail information, including course information that may or may not have been part of your organization's professional development module.

The upper portion of the screen provides a summary view of participant and course(s) registered and/or taken. The Course Information and Detail tabs shown in the lower portion of the screen identify all elements related to the course being browsed. Based on the users' security they may view and/or change the information displayed.

HRPDUPCH - Course History - SunGard Bi-Tech - Modtst34 - Microsoft Internet Explorer

Participant ID: Account #:

Participant Name:

Course Name: Course ID:

Title:

| PARTICIPANT ID | PARTICIPANT NAME |
|----------------|------------------|
| QAPART | Myra, Ajanna |
| QAPROG | Programmer Lc |
| QAPROG | Programmer |
| V6105 | Jeff Fenholt |

Course Information | **Course Detail**

Instructor ID: Status:

Instructor Name:

Schedule:

Participant Grade: Pay Method:

Registration Date: Credit Date: Course Paid:

Reg. Confirmation: Credits: Evaluation Complete:

Start Date: End Date: Seat Hours:

Description:

HRPDUPCH - Course History - SunGard Bi-Tech - Modtst34 - Microsoft Internet Explorer

Participant ID: Account #:

Participant Name:

Course Name: Course ID:

Title:

| PARTICIPANT ID | PARTICIPANT NAME |
|----------------|------------------|
| QAPART | Myra, Alanna |
| QAPROG | Programmer L |
| QAPROG | Programmer |
| V6105 | Jeff Fenholt |

Course Information | Course Detail

Location Code: Room:

Location:

Participant Cost: Require Evaluation:

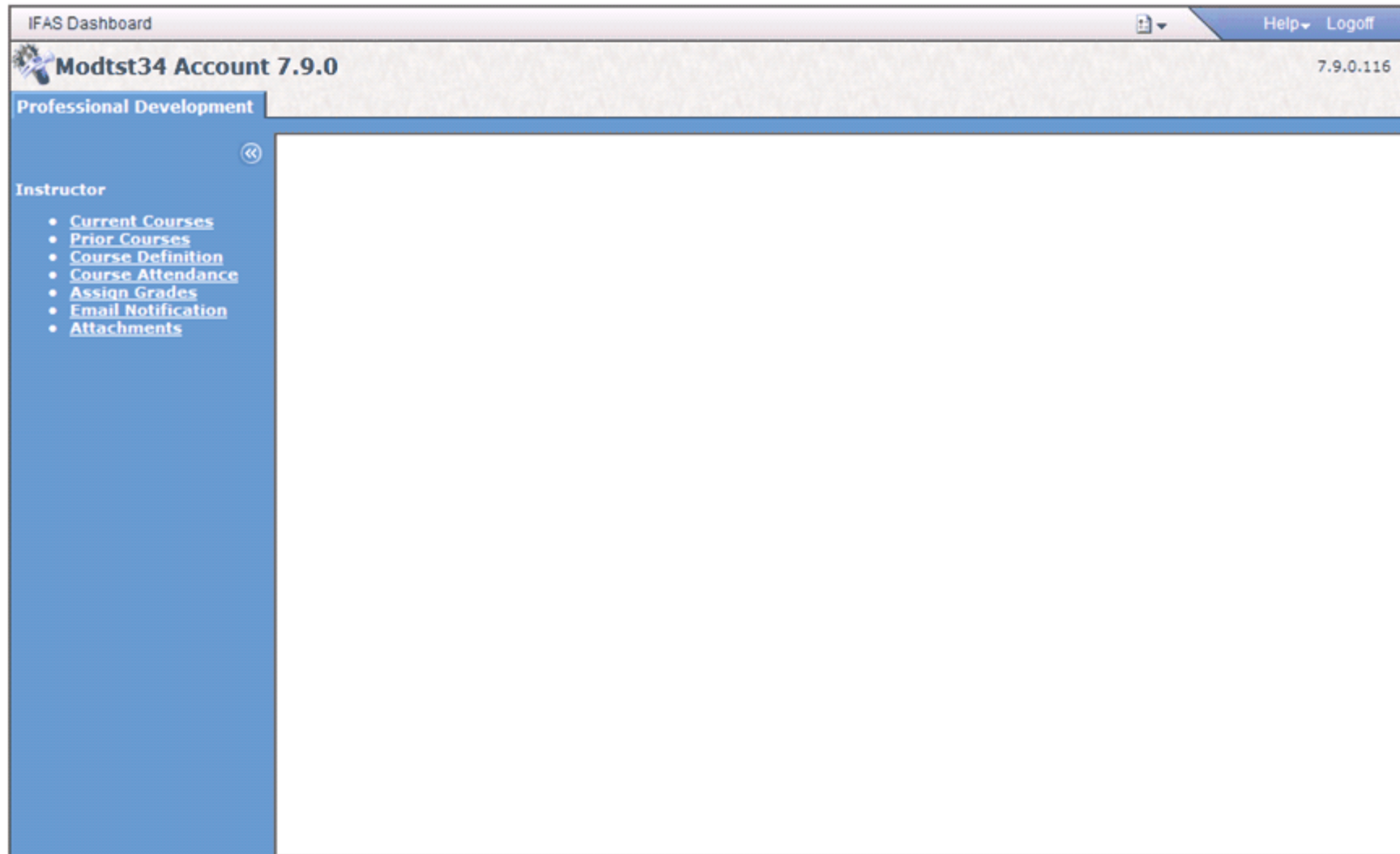
Min Participants: Max Participants:

Materials:

Pre-Requisites:

4.1.2 Instructor

Employee Online – Professional Development tab. The image below displays the Home Page including all available functions for the Instructor.



Current Courses

This view displays a one line summary of each Course that has not been completed by the Instructor. A link to Course Details is provided for reference purposes.

Professional Development

⏪
Instructor

- [Current Courses](#)
- [Prior Courses](#)
- [Course Definition](#)
- [Course Attendance](#)
- [Assign Grades](#)
- [Email Notification](#)
- [Attachments](#)

Current Courses

Jason, Dennis O

[? Help](#)

| Current Courses | Course Status | Start/End Date | Location | Min Max Current |
|--|---------------|-------------------------|----------------------------|-----------------|
| Mathematics 102 | Active | 8/14/2007 - 12/14/2007 | General Education Building | 5 25 8 |
| Accounting 101 | Active | 8/20/2007 - 12/1/2007 | General Education Building | 5 25 0 |
| Accounting 101 | Active | 8/20/2007 - 12/1/2007 | General Education Building | 5 25 7 |
| Advanced Mathematics Teaching Theory | Inactive | 10/15/2007 - 12/31/2007 | General Education Building | 3 9 0 |
| First Aid - Level 3 | Active | 12/1/2007 - 12/31/2007 | General Education Building | 1 1 1 |
| First Aid - Level 1 | Active | 12/1/2007 - 12/31/2007 | General Education Building | 1 1 1 |
| Math and Computers in the Classroom | Active | 12/1/2007 - 2/28/2008 | General Education Building | 5 25 0 |
| Advanced Math and Computers | Active | 1/1/2008 - 3/31/2008 | General Education Building | 5 20 0 |

Print

A link to Course detail information is provided for reference purposes as shown below. Within the Class Date/Time area, the Instructor may select a direct link to the Attendance update screen.

| Course Information | | Jason, Dennis O | ? Help |
|--|--------------------------------|----------------------------------|---------------------------------|
| Course Title: Mathematics 102 | | | |
| Description: Covers the essential instructional techniques for Algebra I and II coursework at the Middle and High School level. | | | |
| Course Duration: 8/14/2007 - 12/14/2007 | | Schedule: 10:00-10:50 MWF | |
| Instructor: Jason, Dennis O | | Syllabus: | |
| Location: General Education Building | Min Participants: 5 | Current Count: 8 | |
| Room: 405 | Max Participants: 25 | | |
| Seat Hours: 6 | | | |
| Materials: Graphing/Analysis Calculator Mathematics: Applying Algebra (Book) | | Credits: 3 | Credits Date: 12/17/2007 |
| Pre-Requisites No data available | | | |
| Area of Study | | | |
| Area Code | Area Description | | |
| GEN1 | Required General Ed Level 1 | | |
| MATH | Mathematics | | |
| Requirements Met | | | |
| Requirement Code | Requirement Description | Comment | |
| DISTREQ1 | District Requirement 1 | | |

Class Date / Time

| Date | Time | Duration | Alternate Location | |
|-------------|-------------|-----------------|---------------------------|----------------------------|
| 8/28/2007 | 10:00 AM | 45 | Building 1 Room 110 | Attendance |
| 8/23/2007 | 10:00 AM | 50 | Building 1 Room 100 | Attendance |
| 8/27/2007 | 10:00 AM | 30 | Building 1 Room 105 | Attendance |
| 8/24/2007 | 10:00 AM | 50 | Building 1 Room 100 | Attendance |
| 8/21/2007 | 10:00 AM | 50 | Building 1 Room 100 | Attendance |
| 8/22/2007 | 10:00 AM | 50 | Building 1 Room 100 | Attendance |
| 8/20/2007 | 10:00 AM | 50 | Building 1 Room 100 | Attendance |

Participants List

| Participant ID | Name | Grade |
|-----------------------|-------------------|--------------|
| V6100 | Bannister, Rodger | PASS |
| FG1 | Gillian, Franc | FAIL |
| V6038 | Elsnore, Raymond | PASS |
| AFCFAN | Clark, Darren | |
| 1570 | Abbott, Jeff J | PASS |
| SA1002 | Smart, Sandy T. | FAIL |
| V6103 | Farnell, Jake | |
| V6067 | Hamel, Kirsten | |
| ATEO01 | TEST, USER | |

 **Back** **Print**

Prior Courses

This view displays a one line summary of Courses that have been previously taught and completed by the Instructor. A link to Course detail information is provided for reference purposes and has the same format as found in 'Current Course' displayed above.


Professional Development

Instructor

- [Current Courses](#)
- [Prior Courses](#)
- [Course Definition](#)
- [Course Attendance](#)
- [Assign Grades](#)
- [Email Notification](#)
- [Attachments](#)

Prior Courses Jason, Dennis O [Help](#)

| Prior Courses | Course Status | Start/End Date | Location | Min | Max |
|--------------------------------------|---------------|------------------------|----------------------------|-----|-----|
| Accounting 102 | Active | 8/20/2007 - 8/27/2007 | General Education Building | 5 | 25 |
| Computer Science 101 | Active | 8/20/2007 - 10/14/2007 | General Education Building | 5 | 30 |
| Accounts / finance | Inactive | 9/15/2007 - 9/27/2007 | General Education Building | 5 | 10 |
| Tests Inst 2 | Inactive | 10/2/2007 - 10/3/2007 | General Education Building | 5 | 9 |

 Print

Course Definition

This view provides the ability for an Instructor to create/update Course Detail Information. Any new Course that is created by an Instructor is automatically placed in a status of 'Inactive' and must be approved and changed to a status of 'Active' by the Administrator prior to being available for registrations.

The Course Definition view is similar to the 'Current Courses' view described above with the exception that all current and prior courses are displayed. The Instructor may select any available Course to update information. To create a new Course the Instructor selects 'Add' in the lower right corner of the Course Definition window.

| Current Courses | Start/End Date | Location | Current Course Status |
|--|-------------------------|----------------------------|-----------------------|
| History 1 | 1/1/0001 - 1/1/0001 | | 0 Active |
| testwf2 | 1/1/0001 - 1/1/0001 | | 0 Active |
| Mathematics 102 | 8/14/2007 - 12/14/2007 | General Education Building | 8 Active |
| Accounting 102 | 8/20/2007 - 8/27/2007 | General Education Building | 1 Active |
| Computer Science 101 | 8/20/2007 - 10/14/2007 | General Education Building | 3 Active |
| Accounting 101 | 8/20/2007 - 12/1/2007 | General Education Building | 7 Active |
| Accounting 101 | 8/20/2007 - 12/1/2007 | General Education Building | 0 Active |
| Accounts / finance | 9/15/2007 - 9/27/2007 | General Education Building | 0 Inactive |
| Tests Inst 2 | 10/2/2007 - 10/3/2007 | General Education Building | 0 Inactive |
| Advanced Mathematics Teaching Theory | 10/15/2007 - 12/31/2007 | General Education Building | 0 Inactive |
| First Aid - Level 1 | 12/1/2007 - 12/31/2007 | General Education Building | 1 Active |
| Math and Computers in the Classroom | 12/1/2007 - 2/28/2008 | General Education Building | 0 Active |
| First Aid - Level 3 | 12/1/2007 - 12/31/2007 | General Education Building | 1 Active |
| Advanced Math and Computers | 1/1/2008 - 3/31/2008 | General Education Building | 0 Active |

Upon selecting the 'Add' function, the following view is displayed.

Three tabs are available for entry:

- Course Definition**
- Class Date/Time**
- Pre-requisites**

The Course Definition screen contains the detail information related to course name, location, content and requirements. The minimum information required for entry is 'Course Name' and 'Course ID'. All other fields may be left blank by the Instructor and/or entered/adjusted by the Administrator within the 7i data entry screen discussed previously.

The screenshot shows the 'Add Course' form with the following fields and options:

- Course Name:** [Text Input]
- Course ID:** [Text Input]
- Status:** Inactive
- Title:** [Text Input]
- Instructor:** Jason, Dennis O
- Description:** [Text Area]
- Start Date:** [Date Picker]
- End Date:** [Date Picker]
- Min Participants:** [Text Input]
- Max Participants:** [Text Input]
- Location:** [Dropdown Menu]
- Room:** [Text Input]
- Schedule:** [Text Input]
- Material:** [Text Area]
- Participation Cost:** \$ [Text Input]
- Credits:** [Text Input]
- Credit Date:** [Date Picker]
- Require Eval.:**
- Count:** 0
- Seat Hours:** [Text Input]

The approved Class 'Location' list is defined within the Person/Entity module under PEUPPE as described in section 2.2.1 of this document. For each Location where classes will be held, create a separate Person/Entity record and enter 'PDLCTN' in any Select Code field. It will be then be displayed in the 'Location' lookup list within the Course Definition screen. For additional information, please refer to the Person/Entity User Guide.

Optionally, a Syllabus or any other detailed document describing the course may be attached to the Course Definition. When this feature is used, all detail Course Information screens provide a link to the Syllabus document for viewing and/or printing.

Attach Syllabus:

Description: Attachment: Professional Development

Local File:

[Back](#) [Print](#) [Save](#) [Cancel](#)

When finished entering all information on the Course Definition screen, click Save before proceeding to the Class Date/Time or Pre-requisites screens.

The Class Date/Time screen allows creation of the individual meeting dates and times along with an optional alternate location. It is not necessary to 'Save' the information. All information entered is automatically saved by the system.

Course Definition **Class Date / Time** Pre-Requisites

Class Date / Time Jason, Dennis O [Help](#)

Course Name:
Title:
Location:

Class Date / Time List

No data available

Create New Class

Date: Time: Duration:

Alternate Location:


[Back](#) [Print](#)

The Pre-requisites screen allows the association of one or more courses that must be completed prior to registration for this course. It is not necessary to 'Save' the information. All information entered is automatically saved by the system.

| Course Definition | Class Date / Time | Pre-Requisites |
|-------------------------------|-----------------------|--|
| Pre-Requisites | | Jason, Dennis O ? Help |
| Course Name: | | |
| Course Title: | | |
| Pre-Requisites List: | | No data available |
| Add New Pre-Requisite: | | |
| Select Course Name: | | <input type="text"/> ... |
| Back | Print | |

Course Attendance


The Course Attendance view allows the instructor access to select a specific course date/time and record attendance for individual Participants. For the desired Course, click on the 'Class Date/Time' link on the right hand side to access the next screen.

| Course Attendance | | Jason, Dennis O | |  | |
|--|-------------------------|----------------------------|---------|---|---------------------------------|
| Current Courses | Start/End Date | Location | Current | Course Status | |
| History 2 | 1/1/0001 - 1/1/0001 | | 0 | Active | Class Date/Time |
| testwf2 | 1/1/0001 - 1/1/0001 | | 0 | Active | Class Date/Time |
| Mathematics 102 | 8/14/2007 - 12/14/2007 | General Education Building | 8 | Active | Class Date/Time |
| Accounting 102 | 8/20/2007 - 8/27/2007 | General Education Building | 1 | Active | Class Date/Time |
| Computer Science 101 | 8/20/2007 - 10/14/2007 | General Education Building | 3 | Active | Class Date/Time |
| Accounting 101 | 8/20/2007 - 12/1/2007 | General Education Building | 7 | Active | Class Date/Time |
| Accounting 101 | 8/20/2007 - 12/1/2007 | General Education Building | 0 | Active | Class Date/Time |
| Accounts / finance | 9/15/2007 - 9/27/2007 | General Education Building | 0 | Inactive | Class Date/Time |
| Tests Inst 2 | 10/2/2007 - 10/3/2007 | General Education Building | 0 | Inactive | Class Date/Time |
| Advanced Mathematics Teaching Theory | 10/15/2007 - 12/31/2007 | General Education Building | 0 | Inactive | Class Date/Time |
| First Aid - Level 1 | 12/1/2007 - 12/31/2007 | General Education Building | 1 | Active | Class Date/Time |
| Math and Computers in the Classroom | 12/1/2007 - 2/28/2008 | General Education Building | 0 | Active | Class Date/Time |
| First Aid - Level 3 | 12/1/2007 - 12/31/2007 | General Education Building | 1 | Active | Class Date/Time |
| Advanced Math and Computers | 1/1/2008 - 3/31/2008 | General Education Building | 0 | Active | Class Date/Time |

A listing of all defined Class Date/Time will be presented. Click on 'Attendance' for the desired date/time to record the Participant attendance records.

| Course Class Date/Time | | Jason, Dennis O | | ? Help |
|--------------------------------------|----------|-----------------------------|----------------------------|------------------------|
| Course Name: MATH102 | | Course Id: MATH102-1 | | |
| Course Title: Mathematics 102 | | | | |
| Class Date / Time | Duration | Alternate Location | | |
| 8/22/2007 10:00:00 AM | 50 | Building 1 Room 100 | Attendance | |
| 8/21/2007 10:00:00 AM | 50 | Building 1 Room 100 | Attendance | |
| 8/20/2007 10:00:00 AM | 50 | Building 1 Room 100 | Attendance | |
| 8/23/2007 10:00:00 AM | 50 | Building 1 Room 100 | Attendance | |
| 8/27/2007 10:00:00 AM | 30 | Building 1 Room 105 | Attendance | |
| 8/28/2007 10:00:00 AM | 45 | Building 1 Room 110 | Attendance | |
| 8/24/2007 10:00:00 AM | 50 | Building 1 Room 100 | Attendance | |

A list of all registered Participants is presented for the selected Course and Date/Time. Attendance is recorded by clicking on individual Participant records. Alternately, in the lower left hand corner, the Instructor may click on 'Select All' or 'Clear All' and then update only the exceptions. A Comments field is provided to record any specific notes. Upon updating all attendance information, click Save at the bottom of the screen.

| Course Attendance | | Jason, Dennis O | |  Help | |
|--|-------------------------|----------------------------|---------|--|---------------------------------|
| Current Courses | Start/End Date | Location | Current | Course Status | |
| History 2 | 1/1/0001 - 1/1/0001 | | 0 | Active | Class Date/Time |
| testwf2 | 1/1/0001 - 1/1/0001 | | 0 | Active | Class Date/Time |
| Mathematics 102 | 8/14/2007 - 12/14/2007 | General Education Building | 8 | Active | Class Date/Time |
| Accounting 102 | 8/20/2007 - 8/27/2007 | General Education Building | 1 | Active | Class Date/Time |
| Computer Science 101 | 8/20/2007 - 10/14/2007 | General Education Building | 3 | Active | Class Date/Time |
| Accounting 101 | 8/20/2007 - 12/1/2007 | General Education Building | 7 | Active | Class Date/Time |
| Accounting 101 | 8/20/2007 - 12/1/2007 | General Education Building | 0 | Active | Class Date/Time |
| Accounts / finance | 9/15/2007 - 9/27/2007 | General Education Building | 0 | Inactive | Class Date/Time |
| Tests Inst 2 | 10/2/2007 - 10/3/2007 | General Education Building | 0 | Inactive | Class Date/Time |
| Advanced Mathematics Teaching Theory | 10/15/2007 - 12/31/2007 | General Education Building | 0 | Inactive | Class Date/Time |
| First Aid - Level 1 | 12/1/2007 - 12/31/2007 | General Education Building | 1 | Active | Class Date/Time |
| Math and Computers in the Classroom | 12/1/2007 - 2/28/2008 | General Education Building | 0 | Active | Class Date/Time |
| First Aid - Level 3 | 12/1/2007 - 12/31/2007 | General Education Building | 1 | Active | Class Date/Time |
| Advanced Math and Computers | 1/1/2008 - 3/31/2008 | General Education Building | 0 | Active | Class Date/Time |

Assign Grades

The Assign Grades view allows the Instructor to assign grades to individual Participants within a selected Course. The initial screen provides a one line summary of all Instructor related 'Current Courses' that are available to Assign Grades. For the desired Course, click on 'Assign Grade' to access the next screen.


| Class Attendance | | Jason, Dennis O | | ? Help |
|--|-------------------|-------------------------------------|----------------------|---------------------------|
| Course Name: MATH102 | | Course Id: MATH102-1 | | |
| Course Title: Mathematics 102 | | | | |
| Instructor Name: Jason, Dennis O | | | | |
| Class Date: 8/21/2007 | | Class Time: 10:00 AM | | Class Duration: 50 |
| Class Location: Building 1 Room 100 | | | | |
| ID | Participant Name | Attendance | Comments | |
| 1570 | Abbott, Jeff J | <input type="checkbox"/> | <input type="text"/> | |
| V6100 | Bannister, Rodger | <input checked="" type="checkbox"/> | <input type="text"/> | |
| V6038 | Elsnore, Raymond | <input checked="" type="checkbox"/> | tardy | |
| V6103 | Farnell, Jake | <input checked="" type="checkbox"/> | <input type="text"/> | |
| FG1 | Gillian, Franc | <input checked="" type="checkbox"/> | absent | |
| V6067 | Hamel, Kirsten | <input checked="" type="checkbox"/> | <input type="text"/> | |
| QAPART | Myra, Alanna | <input checked="" type="checkbox"/> | <input type="text"/> | |
| SA1002 | Smart, Sandy T. | <input checked="" type="checkbox"/> | <input type="text"/> | |
| ATE001 | TEST, USER | <input type="checkbox"/> | <input type="text"/> | |
| Select All Clear All | | | | |

Grade Assignments may be entered for each registered Participant. The 'Assign Grade' field is free form text so that any grading method may be accommodated. When all grades have been entered, click Save to record the information.

| Assign Grades | | Jason, Dennis O | |  | |
|--|-------------------------|----------------------------|---------|---|------------------------------|
| Current Courses | Start/End Date | Location | Current | Course Status | |
| History 2 | 1/1/0001 - 1/1/0001 | | 0 | Active | Assign Grade |
| testwf2 | 1/1/0001 - 1/1/0001 | | 0 | Active | Assign Grade |
| Mathematics 102 | 8/14/2007 - 12/14/2007 | General Education Building | 8 | Active | Assign Grade |
| Accounting 102 | 8/20/2007 - 8/27/2007 | General Education Building | 1 | Active | Assign Grade |
| Computer Science 101 | 8/20/2007 - 10/14/2007 | General Education Building | 3 | Active | Assign Grade |
| Accounting 101 | 8/20/2007 - 12/1/2007 | General Education Building | 7 | Active | Assign Grade |
| Accounting 101 | 8/20/2007 - 12/1/2007 | General Education Building | 0 | Active | Assign Grade |
| Accounts / finance | 9/15/2007 - 9/27/2007 | General Education Building | 0 | Inactive | Assign Grade |
| Tests Inst 2 | 10/2/2007 - 10/3/2007 | General Education Building | 0 | Inactive | Assign Grade |
| Advanced Mathematics Teaching Theory | 10/15/2007 - 12/31/2007 | General Education Building | 0 | Inactive | Assign Grade |
| First Aid - Level 1 | 12/1/2007 - 12/31/2007 | General Education Building | 1 | Active | Assign Grade |
| Math and Computers in the Classroom | 12/1/2007 - 2/28/2008 | General Education Building | 0 | Active | Assign Grade |
| First Aid - Level 3 | 12/1/2007 - 12/31/2007 | General Education Building | 1 | Active | Assign Grade |
| Advanced Math and Computers | 1/1/2008 - 3/31/2008 | General Education Building | 0 | Active | Assign Grade |

Email Notification

This view provides the ability for the Instructor to email all participants regarding any updated information related to a specific course. The initial screen provides a one line summary of all Instructor related 'Current Courses'. For the desired Course, click on 'Email Notification' to access the next screen.

| Course Email Notification | | Jason, Dennis O | |  Help | |
|--|-------------------------|----------------------------|---------|--|------------------------------------|
| Current Courses | Start/End Date | Location | Current | Course Status | |
| History 2 | 1/1/0001 - 1/1/0001 | | 0 | Active | Email Notification |
| testwf2 | 1/1/0001 - 1/1/0001 | | 0 | Active | Email Notification |
| Mathematics 102 | 8/14/2007 - 12/14/2007 | General Education Building | 8 | Active | Email Notification |
| Accounting 102 | 8/20/2007 - 8/27/2007 | General Education Building | 1 | Active | Email Notification |
| Computer Science 101 | 8/20/2007 - 10/14/2007 | General Education Building | 3 | Active | Email Notification |
| Accounting 101 | 8/20/2007 - 12/1/2007 | General Education Building | 7 | Active | Email Notification |
| Accounting 101 | 8/20/2007 - 12/1/2007 | General Education Building | 0 | Active | Email Notification |
| Accounts / finance | 9/15/2007 - 9/27/2007 | General Education Building | 0 | Inactive | Email Notification |
| Tests Inst 2 | 10/2/2007 - 10/3/2007 | General Education Building | 0 | Inactive | Email Notification |
| Advanced Mathematics Teaching Theory | 10/15/2007 - 12/31/2007 | General Education Building | 0 | Inactive | Email Notification |
| First Aid - Level 1 | 12/1/2007 - 12/31/2007 | General Education Building | 1 | Active | Email Notification |
| Math and Computers in the Classroom | 12/1/2007 - 2/28/2008 | General Education Building | 0 | Active | Email Notification |
| First Aid - Level 3 | 12/1/2007 - 12/31/2007 | General Education Building | 1 | Active | Email Notification |
| Advanced Math and Computers | 1/1/2008 - 3/31/2008 | General Education Building | 0 | Active | Email Notification |

The Instructor is presented with an email message view identifying the specific Course and automatically includes All Registered Participants. Each individual Participant email address is placed within the Bcc field to maintain the privacy of each individual. The Instructor may add/delete email addresses from the Cc and Bcc areas. The Subject area is pre-filled with the Course Name but may be adjusted as needed. Upon completion of the message, click 'Email' in the lower right corner and the message will be sent to all addressees.

Email Notification Jason, Dennis O [? Help](#)

Course Name: MATH102
Course Title: Mathematics 102

To:

Cc:

Bcc:

Subject:

Attachments

This view allows the Instructor to upload any type of document and attach it to their Instructor personal information record. Examples of these types of documents might be a resume/vita, professional references, credentials/certifications, etc. Upon opening this screen, a list of previously attached documents is presented. Each of these may be individually viewed by clicking on the description of the desired attachment. A document may be deleted by clicking the 'Delete' line for the desired item.

A new document may be attached by creating a Description, selecting an Attachment Type and locating the document through the Browse button.

Organizations may define their own 'Attachment Type' codes. (These are defined as a part of IFAS Documents Online. Please see your system administrator to have the desired 'Types' defined within the IFAS Admin Console function.)

| Document Attachments | | Jason, Dennis O | ? Help |
|----------------------------|--------------------|------------------------|------------------------|
| Description | Type | Delete | |
| PDF Doc | PE | Delete | |
| Extra Info | PE | Delete | |
| References | PE | Delete | |
| Resume | PE | Delete | |

Add Attachment

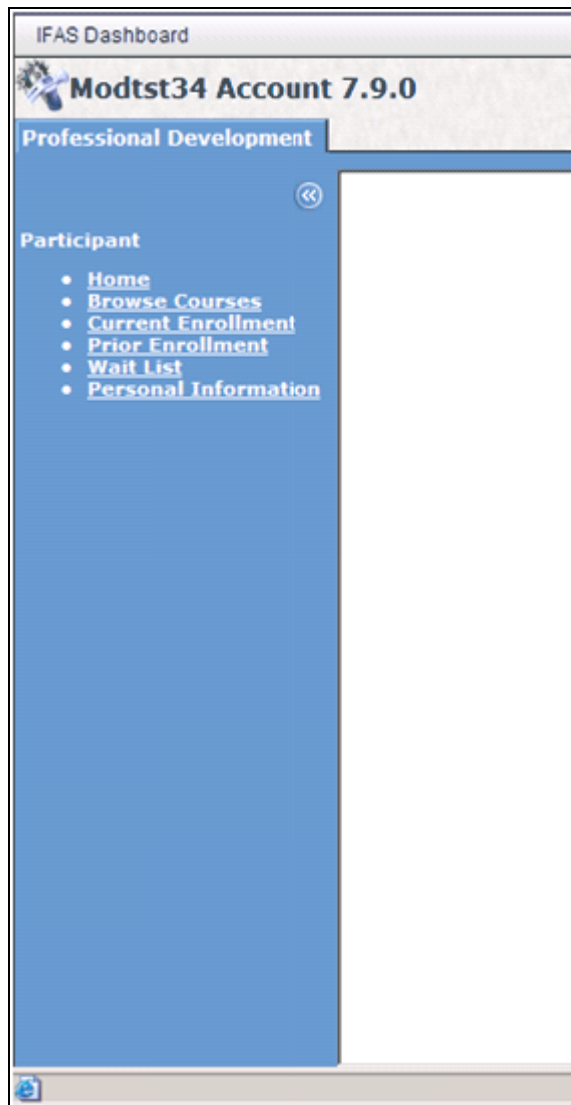
Description: Attachment Type:

Local File:

4.1.3 Participant

Employee Online – Professional Development tab

The image below displays the Home Page, including all available functions, for the Participant.



Browse Courses

This view provides the Participant the ability to search for Courses currently scheduled and available for registration. Any single or multiple fields may be used to narrow the search across all courses. Online Help is available to assist the Participant in using various search techniques. If the Participant would like to view all available courses, make sure all fields are blank by clicking on 'Clear' then click 'Search'.

When the Search process has completed a list of all Courses matching the criteria will be presented. To view the detail information for an individual Course, click on desired Course Title. To view Current and Prior Courses taught by an Instructor, click on their name.

Browse Available Courses
Myra, Alanna
[? Help](#)

Course Title:

Instructor:

Area of Study:

Location:

Start Date: **End Date:**

Results

| Course Title | Start/End Date | Location | Instructor | Credits | Min | Max | Current |
|---|------------------------|-----------|------------------------------------|---------|-----|-----|---------|
| Math and Computers in the Classroom | 12/1/2007 - 2/28/2008 | BUILDING1 | Jason, Dennis ○ | 2 | 5 | 25 | 0 |
| Mathematics 102 | 8/14/2007 - 12/14/2007 | BUILDING1 | Jason, Dennis ○ | 3 | 5 | 25 | 8 |
| Accounting 101 | 8/20/2007 - 12/1/2007 | BUILDING1 | Jason, Dennis ○ | 3 | 5 | 25 | 7 |
| Accounting 101 | 8/20/2007 - 12/1/2007 | BUILDING1 | Jason, Dennis ○ | 3 | 5 | 25 | 0 |
| Mathematics 101 | 9/5/2007 - 11/23/2007 | BUILDING1 | JOE SMITH | 4 | 5 | 20 | 2 |

1

Course Information previously created by the Instructor and Administrator is displayed. By clicking on the Instructor's name, contact information plus current and prior Courses taught are displayed. The Participant can view the Syllabus for the course by clicking on the syllabus title.

| Course Information | | Myra, Alanna | | Help |
|--|--------------------------------|--|-------------------------------|------|
| Course Title: Math and Computers in the Classroom | | | | |
| Description: Introduction to using Computers to reinforce Mathematics concepts. | | | | |
| Course Duration: 12/1/2007 - 2/28/2008 | | Schedule: T-Th; 7:00pm-9:00pm | | |
| Instructor: Jason, Dennis O | | Syllabus: Course Agenda and Detail Syllabus | | |
| Location: General Education Building | | Min Participants: 5 | Current Count: 0 | |
| Room: 105 | | Max Participants: 25 | | |
| Seat Hours: 16 | | | | |
| Materials: Introducing Math with Computer Concepts I Accompanying Workbook | | Credits: 2 | Credits Date: 3/1/2007 | |
| Pre-Requisites | | | | |
| Course Name | Course Title | | | |
| CPSC 120 | Computers in the Workplace | | | |
| Area of Study | | | | |
| Area Code | Area Description | | | |
| MATH | Mathematics | | | |
| Requirements Met | | | | |
| Requirement Code | Requirement Description | Comment | | |
| STTEREQ1 | State Requirement 1 | | | |
| Class Date / Times | | | | |
| Date | Time | Duration | Alternate Location | |
| 12/4/2007 | 7:00 PM | 120 | | |
| 12/6/2007 | 7:00 PM | 120 | | |
| Back | | Print | | |

If the Participant meets the requirements for registration, the Course Registration screen is displayed immediately below the Course Information. Even though the system performs Pre-requisite checking, the Participant must indicate that they meet them as well. If there are Participant Costs associated with the Course, they must also agree to pay the course fees. When all information is entered, click 'Register' and the system will send an email to the Participant to Confirm Registration or indicate that they are on a Wait List.

Note: Currently the BETA VERSION DOES NOT support the payment methods listed. This functionality will be available with the General Release version. However, the Beta version does provide email notification to the Administrator of the charges which need to be paid by individual Participants for each course.

Course Registration

Participant Cost: \$250

I meet the Pre-requisites for the course.
 I agree to pay course fees.

Deduct from my PayCheck
 Bill me
 Bill my Department
 Pay Now

Department:

Credit Card Number:

Expiry Date:

[Back](#)
[Print](#)
[Register](#)

Along with an email confirmation, the following Registration Confirmation will be immediately displayed to the Participant upon the system verification that all registration requirements have been met.

Professional Development

Professional Development Registration Confirmation

Math and Computers in the Classroom

You have successfully registered for the course. Please find the details below. Clicking on the **Print** button will print the Registration Confirmation receipt.

Participant Details:

| | |
|-------|--------|
| ID: | QAPROG |
| Name: | QAPROG |

Registration Details:

| | |
|------------------|-----------------------|
| Registration No: | PDREG000029 |
| Date/Time: | 11/28/2007 8:54:00 AM |
| Status: | Confirmed |

Course Details:

| | | | |
|------------------|-------------------------------------|--------------|---------------------|
| Course Id: | MACP-100-1 | Course Name: | MACP-100 |
| Course Title: | Math and Computers in the Classroom | | |
| Course Duration: | 1/7/2008 - 2/28/2008 | Schedule: | T-Th: 7:00pm-9:00pm |
| Instructor: | Jason, Dennis O | Contact: | dsa@sos.com |
| Location: | General Education Building | Room: | 105 |

[Print](#)

Current Enrollment


This view displays a one line summary of the Course(s) in which the Participant is currently enrolled and active. In addition, the Participant may view or process the following information:


From 'Course Title' view the detail Course Information including Instructor and Syllabus information as described above.

From 'Instructor' view the current and prior courses they have taught as described above.

From 'Evaluation Complete' be able to access the Course/Instructor Evaluation survey.

From 'Drop Course' be able to complete the steps to remove themselves from the selected Course.

| Current Enrollment | | Myra, Alanna | |  Help |
|---------------------------------|-----------------------|---------------------------------|-------------------------------|--|
| Course Title | Start/End Date | Instructor | Eval Complete | Drop Course |
| Accounting 102 | 8/20/2007 - 8/27/2007 | Jason, Dennis O | Eval Complete | Drop Course |
| Mathematics 101 | 9/5/2007 - 11/23/2007 | JOE SMITH | Evaluation | Drop Course |

 Print

Each Course Evaluation may contain different survey questions based on the Administrator's setup. Below is a sample Course/Instructor evaluation. This specific example shows two (2) questions. As the Participant completes each question, their response is recorded and the next question is displayed. Prior responses may be changed until the Course Evaluation period is completed.

Course Evaluation Myra, Alanna [? Help](#)

Course Name: MATH101 **Course Title:** Mathematics 101
Description: Learn college level mathematics.

| Number | Question | Response | |
|--------|---|----------|----------------------|
| 1 | What would you change about this course? | | Edit |
| 2 | On a scale of 0 to 5, how educational did you find this course? | | Edit |

Evaluation Response

Question: What would you change about this course?


Response:

[Back](#) [Print](#) [Save](#) [Cancel](#)

The Drop Course process first displays the detail Course Information so that the Participant may verify that they have selected the correct course to be dropped. They are then presented with dialogue to positively indicate that they are dropping the course. Once they click 'Drop Course' within the Course Cancellation area, they are immediately removed from the Course. If the Course has not begun and there is a Wait List of registrations, the next Participant in line will be immediately confirmed. The Drop Course action and change from Wait List to Confirmed Registration are sent via email notification.



| Course Information | | Myra, Alanna | ? Help |
|--|--------------------------------|---|------------------------|
| Course Title: Mathematics 101 | | | |
| Description: Learn college level mathematics. | | | |
| Course Duration: 9/5/2007 - 11/23/2007 | | Schedule: Every Wednesday at 4:00 PM | |
| Instructor: JOE SMITH | | Syllabus: | |
| Location: General Education Building | Min Participants: 5 | Current Count: 2 | |
| Room: ROOM 101 | Max Participants: 20 | | |
| Seat Hours: 4 | | | |
| Materials: Mathematics Primer Book | Credits: 4 | Credits Date: 11/26/2007 | |
| Pre-Requisites No data available | | | |
| Area of Study | | | |
| Area Code | Area Description | | |
| GEN1 | Required General Ed Level 1 | | |
| MATH | Mathematics | | |
| Requirements Met | | | |
| Requirement Code | Requirement Description | Comment | |
| DISTREQ1 | District Requirement 1 | District General Education Requirement | |
| STTEREQ1 | State Requirement 1 | State General Education Requirement | |

Along with an email confirmation, the following Drop Course Confirmation will be immediately displayed to the Participant upon the system verification that all drop course processes have successfully completed.

| Professional Development | | | |
|---|-------------------------------------|--------------|---------------------|
| Professional Development Drop Course Confirmation Math and Computers in the Classroom <i>You have been successfully unregistered for the course. Please find the details below. Clicking on the Print button will print the Registration Confirmation receipt.</i> | | | |
| Participant Details: | | | |
| ID: | QAPROG | | |
| Name: | QAPROG | | |
| Drop Course Details: | | | |
| Drop Course Confirmation No: | PDDRO000014 | | |
| Registration No: | PDREG000029 | | |
| Date/Time: | 11/28/2007 8:58:51 AM | | |
| Status: | Dropped | | |
| Course Details: | | | |
| Course Id: | MACP-100-1 | Course Name: | MACP-100 |
| Course Title: | Math and Computers in the Classroom | | |
| Course Duration: | 1/7/2008 - 2/28/2008 | Schedule: | T-Th: 7:00pm-9:00pm |
| Instructor: | Jason, Dennis O | Contact: | dsa@sos.com |
| Location: | General Education Building | Room: | 105 |
|  Print | | | |


This view displays a one line summary of previous courses completed. Links are provided to the detail Course Information, Instructor Information and provides the ability to Print their completion certificate One-Time if they received a passing grade. The detail Course and Instructor Information are the same as described above.

The Print Certificate option is only available after the Participant successfully completes the Course. The ability to print the certificate is a one-time option. If there is a printer problem and/or the Participant needs to reprint the Certificate, the Administrator can access the HRPDUPCD – Registration tab and place a ‘check mark’ in the ‘Certificate Available’ field. This will reset the Certificate for reprinting.

| Prior Enrollment | | | | Nyra, Alanna | |  Help |
|--|------------------------|---------------------------------|-------|-----------------------------------|--|--|
| Course Title | Start/End Date | Instructor | Grade | | | |
| Computers in the Workplace | 8/20/2006 - 12/14/2006 | Zavada, Kathy P | PASS | Print Certificate | | |
|  Print | | | | | | |

Wait List

This view displays any courses for which the Participant is currently on the Wait List and their position on the List. The detail Course and Instructor Information are the same as described above.

| Wait List | | Myra, Alanna | | | ? Help |
|---|------------------------|---------------------------------|----------|---------------|------------------------|
| Course Title | Start/End Date | Instructor | Capacity | List Position | |
| First Aid - Level 3 | 12/1/2007 - 12/31/2007 | Jason, Dennis Q | 1 | 1 | |
|  Print | | | | | |

Participant Information

This view displays the current Name, Address, Phone and Email information on file for the Participant and provides the ability to edit that information if this capability is defined within the security setup. Employee Information is drawn from the IFAS Human Resource module. Non-employee Participant information or sites not utilizing the IFAS Human Resource module will have the data drawn from the IFAS Person/Entity module.

| | | |
|--------------------------------|---|---|
| Participant Information | Myra, Alanna | Help |
| Name | | |
| First Name: | <input type="text" value="Alanna"/> | |
| Last Name: | <input type="text" value="Myra"/> | |
| SSN: | <input type="text"/> | |
| Address | | |
| Address Type: | <input type="text" value="HOME ADDRESS CODE"/> | |
| Address Line 1: | <input type="text" value="Add1"/> | |
| Address Line 2: | <input type="text"/> | |
| Address Line 3: | <input type="text"/> | |
| Address Line 4: | <input type="text"/> | |
| City: | <input type="text" value="CA"/> | State: <input type="text"/> |
| | | Zip: <input type="text" value="5600654"/> |
| Phone | | |
| Phone Type: | <input type="text" value="HOME PHONE"/> | |
| Phone Number: | <input type="text" value="(333) 333-3333"/> | <input type="text" value="4449"/> |
| Email | | |
| Email Type: | <input type="text" value="HOME EMAIL"/> | |
| Email Address: | <input type="text" value="darren@qa-mail.com"/> | |
| Print | | Edit |

4.2 Reports

Not Available at time of printing.

5. Troubleshooting

Not Available at time of printing.

6. Advanced / Special Configuration

Not Available at time of printing.

7. Module Integration

7.1 Posting

Available with 7.9.0 General Release

7.2 Security

7.2.1 Professional Development portal security

The only security necessary for entrance into the Professional Development portal is the establishing of specific association codes in the user definition, available either via NU UP US or the Administrative Console.

- Participant security is based solely on an association of “PDPART” in the user definition (NU UP US). The “PDPART” association will give the user access to the participant options within the Professional Development system. All data displayed will inherently be related solely to the logged in participant.
- Similarly, Instructor security is based solely on an association of “PDINST” in the user definition (NU UP US). A user may have both “PDPART” and “PDINST” associations if the user is both an instructor and a participant. Instructors are automatically restricted to information related to courses where they are the instructor. Instructors will not have access to any participant information other than their attendance and grade records associated with the courses where they are the instructor.

7.2.2 Professional Development 7i Screen security

Access to the Professional Development 7i screens (and associated tables) is an administrative user function and controlled via standard menu and table security as defined in the Administrative Console using the “Manage Security Roles” and “Manage Users” plug-ins (see the 7.9 security guide for more information on IFAS menu and database table access).

8. Implementation

8.1 Dependencies

- EO - Employee Online must be implemented prior to any Instructor or Participant access to the module
- Workflow – This module must be implemented prior to any PD setup and testing.
- HR – If the IFAS Human Resources module is used, employee information required by PD for Instructors and Participants will be drawn from this source first.
- PE – The IFAS Person/Entity module is used by sites for PD Instructor and Participant information if they are not employees or the site does not utilize the IFAS HR module for employee information.

8.2 Template Project Plan

The Consulting Objectives and timing outlined in ONTRACK Agendas are subject to change based upon specific client issues and factors. They are meant to provide an estimated timeline based upon a typical IFAS implementation.

Plan Stage: 1 day

- Prepare Project Plan
- Schedule Training

Prepare Stage: 4 days

Install to Test (remote)

- Remote Installation
- Install Verification

Execute Stage: 10 days

Professional Development Setup and Training

- PD Demo/Overview
- PD Workflow and Forms Needs Analysis/Spec Creation
- General PD functions DL
- PD Administrator and Workflow setup
Forms Delivery

Confirm Stage: 10 days

Testing and Refining

- Administrator Testing
- Course Definition and Activation Testing
- Registration and Course Completion Testing
- Verify Email Notification and Certificate of Completion formats

Install to Production

- Test in Production
- Implement Deployment Strategy
- Professional Development Live in Production

Support Stage

8.3 Agenda's

Pre-requisites

- General Familiarity with IFAS 7i, Workflow and the Employee Online (EO) module
- Review the Professional Development (PD) user documentation
- Determine level of functionality desired as described within Sections 1.3 and 2.0 in this user documentation.

General Information – Distance Learning Session with Client

- Introductions
- PD Implementation Schedule
- Standard PD implementation tasks
- Standard PD documentation review
- PD installation within the Test account and EO module

PD Functional Review – 2 - Distance Learning Sessions with Client

Administrator functions

- Required vs. Optional
- Course Definition and Activation
- Course Management
- Course Billing (if needed)
- Course Completion

Instructor Course processing

- Course Definition (if decentralized process selected)
- Course Communication
- Course Completion

Participant

- Registration
- Wait List
- Drop Course
- Course Communication
- Course Completion

Client Completes prior to next DL

- Format for Certificate of Completion and Email notifications
- Workflow requirements (Workflow setup to be the responsibility of local IT staff unless separately contracted with SunGard Bi-Tech)

Consultant/SunGard Bi-Tech Setup/Install

- Certificate of Completion

PD Pre/Post Testing Reviews – 2 Distance Learning Sessions with Client

- Test Completion Objectives
- Identify Testing Impediments
- Review/Adjust Setup as needed

PD – Move to Production

Consultant Configure/Verify Setup

- Client specific codes/setup
- Workflow in Production
- Email notifications working in Production
- Certificate of Completion printing in Production

8.4 Consulting Objectives

- Assist the designated Administrator in becoming self-sufficient with setup and management of Course, Instructor and Participant functions.
- Ensure that initial Course definitions, Email notifications and Workflow processes are functioning based on client requirements.
- Verify the Certificate of Completion format and printing meets client specifications.

9. FAQ

Not Available at time of printing.