The Training Central End User Guide

Solution Description

Training Central is used to list and manage an organization's internal training courses. It allows your organization to easily offer the same class multiple times, manage enrollment, and create and review evaluations. It also integrates with the Training Approval solution.

Solution Category: Business Processes

Primary Design Pattern: Matrix

For a diagram of a common scenario for this solution, see the last page of this document.

When to Use This Solution

This solution can be used when:

- Your organization offers training internally and needs an easy way to manage it
- You are using the Training Approval solution

How to Use the Training Central Solution

Set Up Class List

Before setting up any classes, it is a good idea to create a list of Categories for the classes, if any are needed. Then, have someone with Administrator permissions on the Training Central site modify the settings for the Training Class list and update the Category column with the appropriate values.

Next, enter the list of classes that the organization offers. This is a list of class titles and descriptions, but not the specific date of the class. This design enables you to offer the same class multiple times.

- Under the Class Maintenance tab, click Add or Update Class.
- Follow the on-screen instructions to create the list of training classes.
- Note that from here, you can also make a class inactive. This is so that in the future you can stop a class from being offered, but still maintain a description of that class if it is needed for historical purposes.

Add Specific Class Instances

Also under the Class Maintenance tab is a page for Add or Update Class Instance. Go here to enter the specific dates when classes are offered. Follow the on-screen instructions.

When you select Add new training class instance from the drop-down, a form opens. The Participants field and the last field called Days *must* be numeric. (Note: under the Begin date selection and the End date selection, you will see a drop-down and a small box labeled "Day(s)". You should leave these blank if you have entered dates for Begin and End.)

Once class instances have been created, you can see those offered in the next 60 days on the main Training Central tab.

NOTE	If you look at the actual settings for the Class Instance list, you will see a column called Registration Contact. If a name is filled in for this column, this person will receive an e-mail notification every time someone signs up for this class instance. However, this column is not displayed in the data entry form when the Add New Training Class Instance action is run. Go to the list item and fill it in if you wish to use it. Also, in the Class Instance list you may notice some columns for which the meaning is not entirely clear, such as Time Type or Year. These are needed for compatibility with the Shared Calendar, so the items can be shown together in the same Active Display. For this or any other list, it is not recommended that you change or remove existing columns.

Maintaining Class Enrollment

NOTE	For this to work, the Group Directory List must contain the Training Approval site(s) that integrate with Training Central. See the Solution Setup Guide for more details.

On the Class Maintenance tab, all upcoming classes are shown along with the names of individuals signed up for the class, both unapproved and approved. The records are grouped by Class then by Begin Date.

Use this page to check if a class has reached its maximum participants. Do this by looking at the first record for a group, which should have the name "1-Training Class Info" and the maximum people that can take the class in the Participants column. Compare this to the count of records shown for the section. Since the Training Class Info record is also counted, there can be one more record than participants. If this maximum has been reached, stop further enrollment by checking the box to the left of the Training Class Info record, then selecting the Close Class (no enrollment at this time) action from the drop-down and clicking Go.

Creating Training Evaluations

Also from the Class Maintenance tab, training evaluation forms can be created for individuals to complete after taking a class:

1. Check the boxes next to the names of all the people who need to fill out an evaluation.
2. Be sure not to check the Training Class Info record(s).
3. Select Create Training Evaluation(s) from the drop-down and click Go.

Training evaluation forms with the name of the trainee, the class title, and class date have now been created and are in the Training Evaluation list.

Your organization may want to create a standard for when the Training Evaluation records should be created, such as the last day of the class. As soon as they are created, they are available and the person will see the record with his or her name on the home page of the Training Approval site.

About the Privacy of Training Evaluations

The Training Evaluation list is set up with SharePoint Content Approval. When the evaluations are first created, it must be by someone with Manage List rights on this list (see the Solution Setup Guide). This way, the records are created in an Approved status so that the person who will fill it out has access to the record. The Training Approval home page will show the new record in the My Evaluations Pending section. Once the person modifies the evaluation by starting to fill it out, it will be switched to Pending status, and will be visible only to the content approvers (those with Manage List rights) and the person who modified it. Because of this setup, people can be prevented from reading each other's evaluations. SharePoint also stores who last modified the record, so you can tell that the person who filled out the evaluation is the person who was supposed to.

Filling Out a Training Evaluation

There are two ways to access a Training Evaluation record to complete the evaluation questionnaire. The easiest is to go to the Training Approval site and click on the record under My Evaluations Pending. The other way is to go to the Training Central site and open the Training Evaluation list (from the top bar, click Documents and Lists, then click Training Evaluation). Then find the record with your name in the Name column.

Once you have the Training Evaluation record open, click Edit Item and then fill out the questionnaire. When you get to the Stage field, change the value to the appropriate one, then click Save and Close to save your changes.

Processing Complete Training Evaluations

Use the Training Evals tab to see all evaluations that have been completed recently or are awaiting completion. Items are grouped by Class but not by Begin Date, so that you can see the complete feedback on a class, regardless of when it was taken.

Once someone edits a Training Evaluation, it will be listed in a Pending status. This prevents other people without Manage List rights from seeing it. If the person is done with the evaluation, they should have changed the Stage to 03-Evaluation Complete. Right-click a section of the Training Evaluations, and you will see an option for Export to Microsoft Excel. Export the information to Excel. Keep complete items for the class you are interested in and delete the other rows. Now you can manipulate the data as needed for analysis. Save the spreadsheet to a secure location. You could create a "Complete Evaluations" library in the Training Central solution.

It is recommended that you then go to the Training Evaluation list and delete records that are in the stage Evaluation Complete so that they are not visible to others and can no longer be changed.

Training Evaluation Workflow Explained

As you can see from reading the above, the training evaluation process is very powerful, but requires a thorough understanding of the expected workflow in order to be used properly. For this reason, the solution provides a page called Evaluation Workflow Explain that can be accessed under the Training Materials tab. The information on this tab is stored in the Instructions list, and can be updated as needed for your organization.

Training Materials Tab

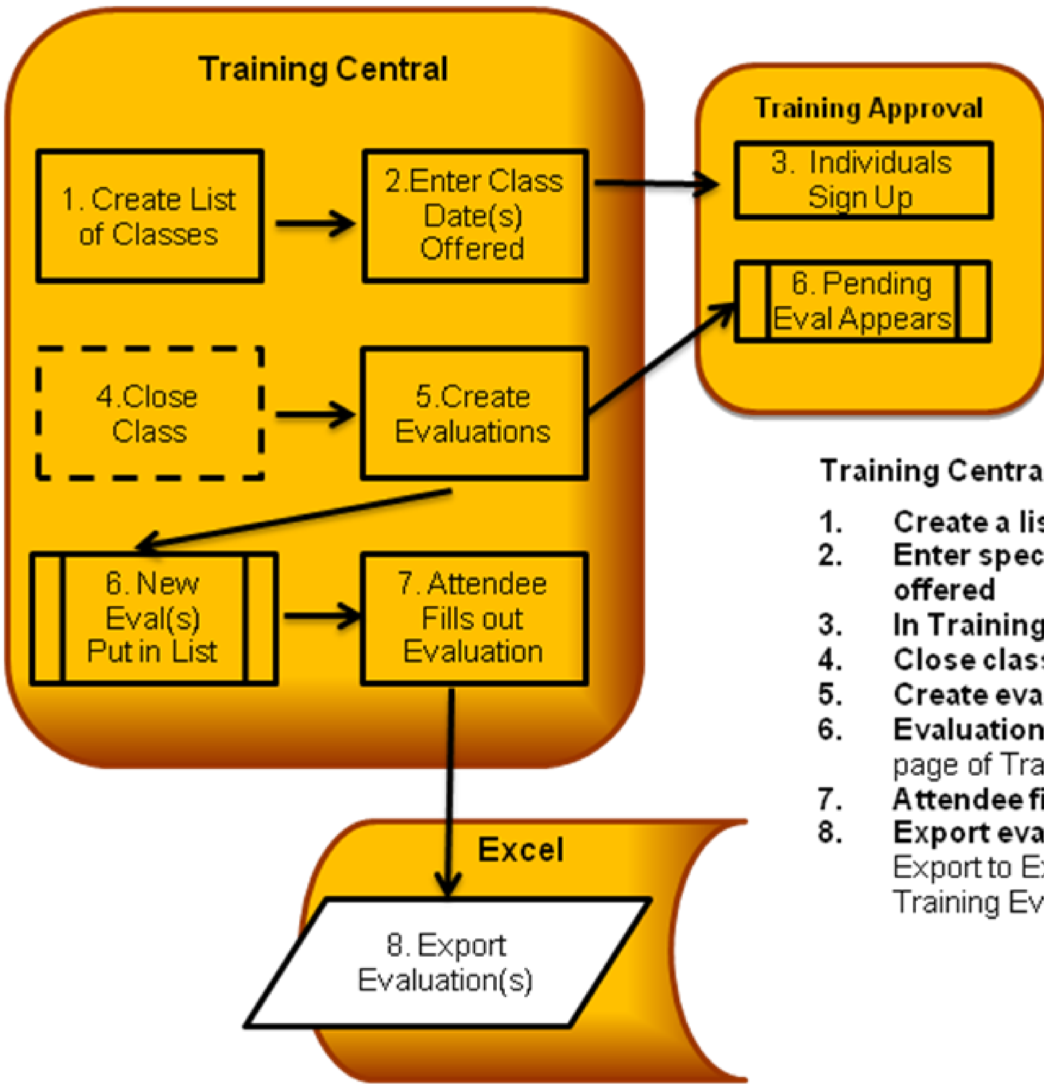
The Training Materials tab provides access to the Documents document library in the Training Central site. From this tab, you can upload a document, or created a new one. Each document stored in the library can be associated with class through the use of the Class Title column. This is useful for storing items such as agendas, training handouts, workbooks, etc.

NOTE	If there are a large number of classes, and each has several training documents, over time, your organization may choose to create additional libraries, or even SharePoint Document Workspaces to manage the documentation for a single class.

Training Central Home Page

The main Training Central tab provides a view of classes beginning up to 60 days from the current date. It also uses the Group Directory List to provide links to Training Approval sites. This page is intended for general visitors to the Training Central site.

Training Central Process Diagram



Training Central Solution

1. **Create a list of classes offered**
2. **Enter specific date(s) that a class will be offered**
3. **In Training Approval, people sign up**
4. **Close class**
5. **Create evaluations on last day of training class**
6. **Evaluations are created** and appear on home page of Training Approval site
7. **Attendee fills out evaluation**
8. **Export evaluations** (Right-click data and select Export to Excel. Save Excel spreadsheet. Go to Training Evaluation and delete records.)