AdminSTAR Login

Logging into AdminSTAR requires entering a USERID and a PASSWORD.

1. Type your **user name** as you defined it under the Database function in the Set-Up Menu.

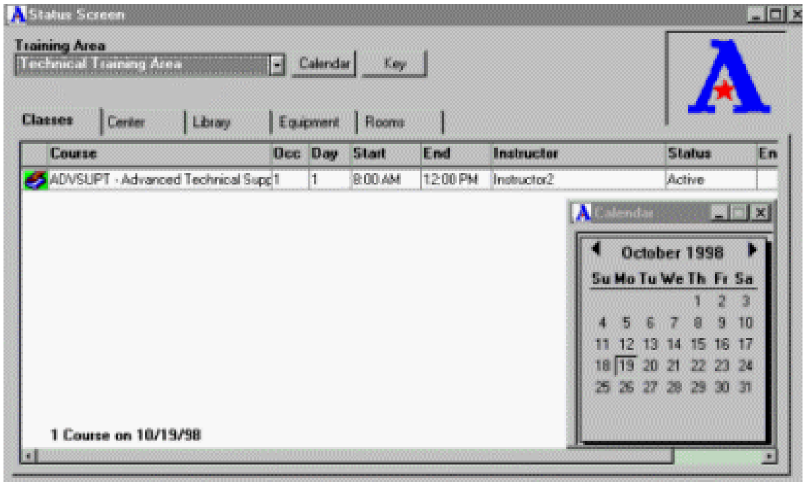
2. **TAB** to the Password field and type your **password** as you defined it under the Database function in the Set-Up Menu.

3. Press the **Enter** key or click on the **Login** button.

Terms Used with Log In

Note: After you have logged in with your user name and password, you should go to the File Menu item in the Main Menu screen (NOT the Set-Up Main Menu screen), click on File and then click on Set Password. Here you should change your password to something confidential.

The Main Menu - The Daily Status Screen



When you login to AdminSTAR as a Training Area Administrator, you are brought to the Daily Status Screen. This is the Main Menu screen of AdminSTAR. Here, you can view the status of five types of training resources, Classes, Centers, Libraries, Equipment and Rooms for any DAY.

1. To see the different views, just click (highlight) the appropriate **RADIO** button.

2. If you click on **Classes**, you will see the Course ID, the Course Name, its occurrence number, the number of days that course is scheduled, the start and end times for the course and the assigned instructor. **Double click** on a course to move to the enroll/drop screen to alter learner status, enroll learners, or send e-mails.

3. If you click on **Center**, you will see the Learner Name, the Material Title, the Date, Start and End time of the session and the Multimedia Station ID.

4. If you click on **Library**, you will see the Copy ID, the Material Title, the Learner Name, and the Learner's Phone number. This is a listing of all materials due back on this day.

5. If you click on **Equipment**, you will see the Equipment Name, the ID, its occurrence number, the start and end date, the learner who reserved the equipment, his/her phone, and the reason for the reservation.

6. If you click on **Room**, you will see the Room Name, the ID, the start and end time, the person reserving, the reason, and the date reserved.

---

*Note: As a Training Area Administrator, you can **NOT** change the Training Area.*

*Click on **Close** if you want to close the Main Menu. To **OPEN** this screen again, just click on the **YELLOW QUESTION MARK** button on the Main Menu bar.*

Note: The Status Screen can be modified to display alternate bitmap images.

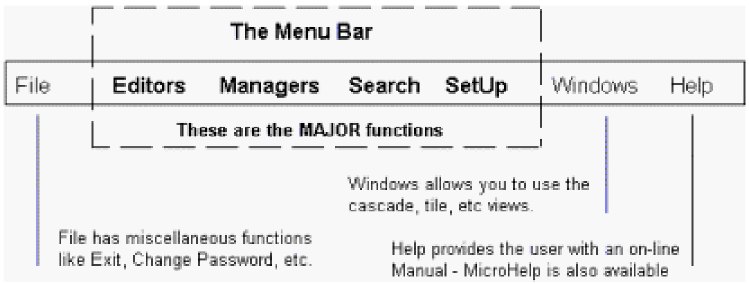
---

1. Open the A_start.ini file

2. *Add to the [Program] section the line: "Logo=C:\logo.bmp" (Logo=path to the bitmap file.)*

How AdminSTAR is Organized

The Menu Bar at the top of the AdminSTAR screen is designed as shown here:



The FOUR Major Functions of AdminSTAR include:

1. **Set-Up**

   This function takes care of the administrative duties in AdminSTAR, as for example, setting up all the Global and Training Area defaults. Here you build your "customized" lists for sorting and searching information as well as set up security and database privileges for AdminSTAR users.

2. **Editors**

   The editors allow you to ADD, DELETE and/or CHANGE information about Learners, Instructors, Classrooms, Learning Resource Centers, Curriculums, Courses, Training Equipment, Learning Materials, and Training Vendors.

3. **Managers**

   There are five (5) Managers, the Classroom Manager, the Library Manager, the Room Manager, the Equipment Manager and the Learning Center Manager. This is the operation center of AdminSTAR. It is here that you schedule and track usage of the various training resources for the learners. All the Reporting functions are in each of the individual Managers.

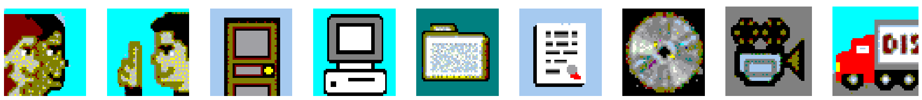
4. **Search**

   Two Search functions allow you to 1) search for information on training resources available at the company and 2) check the status of the training rooms, equipment and instructors for any particular day.

Overview of AdminSTAR Editors

As the name implies, it is in the editors where you ADD, EDIT, and DELETE information about AdminSTAR.

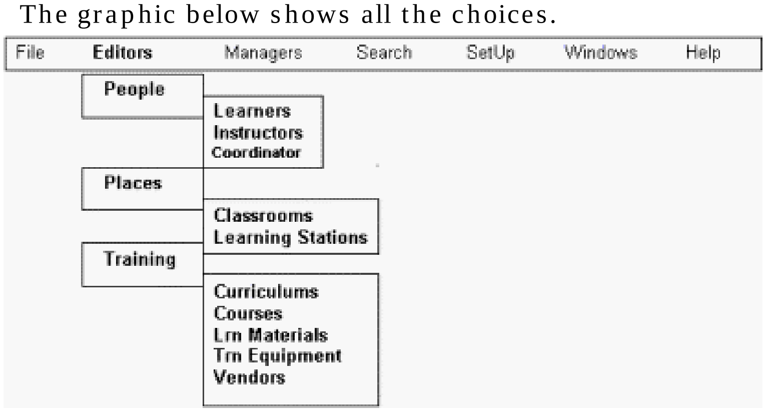
At the top of the AdminSTAR screen, you will notice a strip of picture icons below the Menu Bar. The group on the left represents the AdminSTAR Editors.



Learner Instructor Room Station Curriculum Course Material Equipment Vendors

In the Learner Editor, you will create, and edit the Learners. Learners are those who take Courses, both Classroom delivered and Self-Study, and use Learning Materials. Instructors are created and edited in the Instructor Editor. Rooms, locations where Instructor led Courses are held, are created and edited in the Room Editor. Stations, locations where multimedia self-study courses are delivered, are created and edited in the Station Editor. Courses, both self-study and classroom delivered, are created and edited in the Course Editor. In the Curriculum Editor, series of Courses are linked together to create Curricula. Materials are items used to facilitate learning and can be used for self-study, borrowed or distributed. They are created and edited in the Materials Editor. Equipment used in Courses and Learning Centers, is created and edited in the Equipment Editor. Vendors of these Materials are created and edited in the Vendor Editor.

Another way to access the Editors is through the drop down menus. To access any of the Editors, click on Editors on the Main Menu Bar of AdminSTAR. Move your cursor down to People, Places or Training. Click on one of these three choices and other choices will appear to the right. Move your cursor to the right and click on one of these choices. The graphic below shows all the choices.



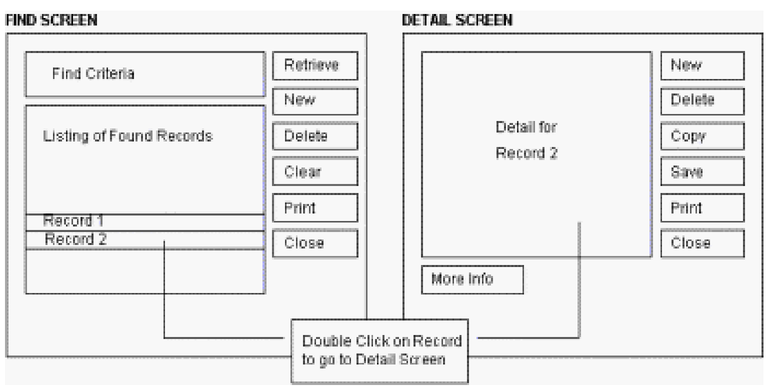
After entering and editing data in the Editors, you will be able to manipulate this data in the Managers to manage your Classroom instruction, Multimedia Learning Centers, Equipment, Rooms and the Lending Library.

All the editors work the same, so if you understand how one editor works, you understand all the editors. Here are the general guidelines for working with editors:

Whenever you click on an Editor choice, you will immediately be brought to the Editor Find Screen. The Find Screen is where you search for and retrieve data. At the Find screen you enter in Find criteria and then click on RETRIEVE for a list of a records. You can also add a NEW record, DELETE a retrieved record, CLEAR the screen and start over, PRINT the listing or CLOSE the window.

By double clicking on an individual record in the Find Screen, you go to the Detail screen.

At the Detail screen you can add a NEW record, change the information and SAVE the changes or make a COPY of the record (If you want to quickly create another record similar to the last one).



Overview of AdminSTAR Managers

The Managers are where the scheduling and tracking takes place. When you click on Manager, you will see five Main choices, Classroom Manager, Library Manager, Equipment Manager, Room Manager and Learning Center Manager.

Classroom Manager

Under Classroom Manager, you will see three sub-choices, Pre-Scheduling, Scheduling and Export.

1. **Plan**

   These set of screens allow you to create a specific time period, enter training organization commitments for upcoming training and formulate a budget and a future training schedule.

2. **Schedule**

   These set of screens allow you to schedule a specific course for days and times at a particular location, at a particular classroom with a particular instructor. You also can reserve necessary training equipment required for the course.

3. **Export**

   This function allows an administrator to export specific data on courses to other programs.

Learning Center Manager

If you click on Learning Center Manager, you will see one (3) sub-choices, Enroll/Schedule, Edit Schedules and Attend/Complete.

1. **Enroll/Schedule**

   These set of screens allow you to schedule a specific multimedia self-study course for days and times at a particular Learning Center, at a particular learning station outfitted with particular multimedia equipment.

2. **Edit Schedules**

After you have enrolled and initially scheduled the learner into a self study learning station, the Schedule function allows you to go back and make any changes to the learners schedule. You can also see a listing of all the schedules for the learning center in a grid or as a weekly calendar.

3. **Attend/Complete**

After you have enrolled and initially scheduled the learner into a self study learning station, the Schedule function allows you to go back and make any changes to the learners schedule. You can also see a listing of all the schedules for the learning center in a grid or as a weekly calendar.

Library Manager

If you click on Library Manager, you will see seven (7) sub-choices, Loan, Return, Extend, Wait List, Distribute, Inventory Orders, and Memos.

1. **Loan, Return and Extend**

These three functions allows an administrator to loan a Learning Material, log its return to the center and if desired, extend the loan period.

2. **Wait List**

This function allow an administrator to wait list a Learner for a specific learning material so that when it returns, it can either be loaned immediately to the Learner, or placed on Hold for the Learner to get later.

3. **Distribute and Inventory Orders**

These functions allow an administrator to track distribution of materials to Instructors or Learners, inventory levels and orders to training vendors.

4. **Memos**

This function allows an administrator to create overdue memos and hold memos to notify learners that materials are waiting or that they are due back.

Equipment Manager

If you click on Equipment Manager, you will see two (4) sub-choices, Reserve, Check-In, Show Out and Show Reservations

1. **Reserve and Check-In**

These functions allow an administrator to reserve equipment and then check it out. Subsequently, the

Check-In function allows the administrator to check the equipment back into the center.

2. **Show Out and Show Reservations**

   These functions allow an administrator to see the equipment reservations as well as the equipment that is already checked out.

Room Manager

If you click on Room Manager, you will see one (1) sub-choice, Reserve.

1. **Reserve**

   This function allows an administrator to reserve any number of rooms in a Training Organization for a range of dates.

Finding Records

Using the % as a wildcard

In any field, you can enter a first letter, or as much of a name as you like followed by a percent sign (%). After clicking Retrieve, this will bring up all names that *begin* with the letters you typed in. In the Learner Editor, for example, if you typed in Jack%, and clicked Retrieve, all names that begin with Jack would be brought up; Jackson, Jackobson, etc. If you typed in %Jack, all the names *ending* in Jack would be brought up; Lumberjack, etc. You can also search for all records that include jack by typing %jack%.

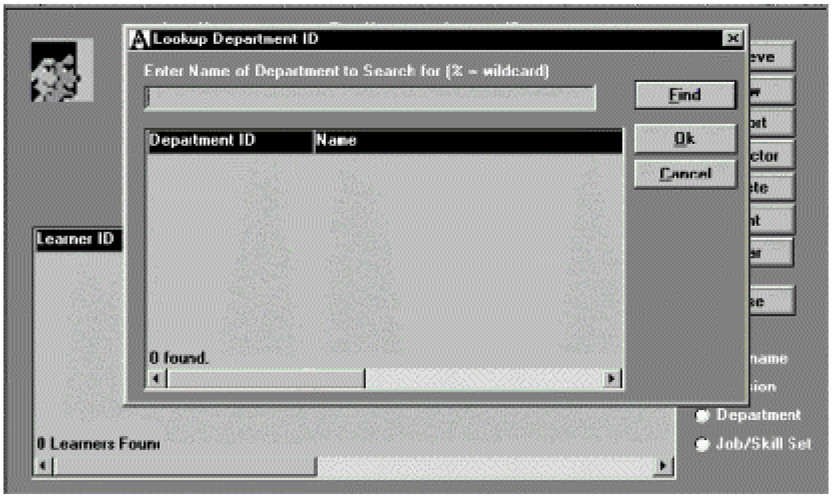
Using the Drop Downs

You may also enter search criteria by selecting a specific drop down from in the Search Criteria area of the Find screen. For instance in all the Find screens, there are drop down boxes from which you can make selections on items like Division, Location, Training Region, City, etc.

Using the Search Button

You may also enter search criteria by clicking on the Search Button at the Learner screen. This is a SPECIAL search function for this Editor.

Below is an example of the Look Up function to find the Department of a Learner.



Note: You do not have to enter search criteria in a Find Screen. However, you may find that it helps to narrow down a potentially large block of data. AdminSTAR will warn you if your search will result in returning more than 500 records.

Guidelines for Entering Initial Data into AdminSTAR

The **VERY FIRST TIME** you enter data into AdminSTAR, you should be aware that there is a preferred order. The following guidelines will help make initial data entry easier:

Step 1

Enter Vendors before you enter Learning Materials

When you create Learning Material copies, you will be identifying the Distributor (or Vendor) for that Material. If you already have the Distributors entered, you can associate them with Materials.

Step 2

Enter Equipment before you enter Courses

When you create Courses, you can associate Equipment with them. Therefore, if you have already created Equipment, you are ready to associate it to Courses.

Step 3

Enter Learning Materials before you enter Courses

When you create Courses, you can associate Learning Materials with them. Therefore, if you have already created Materials, you are ready to associate them to Courses.

Step 4

Enter Courses before you enter Curriculums

When you create Curriculums, you will associate Courses with them. If you have already created Courses, you can associate them to Curriculums.

Step 5

Enter Learners before you enter Instructors.

AdminSTAR allows you to create Instructors from Learners in a single, easy step. So, if you already have Learners data entered, you may create Instructors from that data

Step 6

Enter Courses before you enter Instructors

When you create Instructors, you can associate Courses with them. If you have already created Courses, you can associate Instructors to them easily.

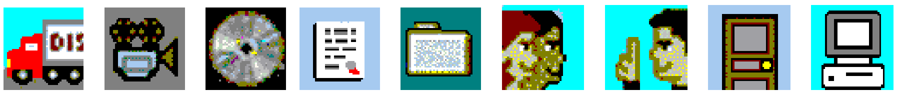
Step 7

You may enter Rooms and Learning Stations any time you want

There are no associations or linkages with the other editors for these categories, so these can be created at any point.

Keeping these guidelines in mind, it is suggested that the first time you enter data into AdminSTAR, you follow this order:

1 2 3 4 5 6 7 8 9



Vendors Equipment Material Course Curriculum Learner Istructor Room
Station

The remainder of the Editor portion of this manual will be presented in this preferred order.

Some AdminSTAR Definitions:

Learners are those persons (usually employees) who take Courses, both Classroom delivered and Self-Study, and use Learning Materials. They are defined in the Learner Editor.

Instructors are those persons (sometimes employees) who instruct Learners. They are defined in the Instructor Editor.

Rooms are building locations where Instructor led Courses are held. They are defined in the Room Editor.

Stations are building locations where multimedia self-study courses are delivered. These are usually self-study booths. They are defined in the Station Editor.

Courses, can be both self-study and classroom delivered. They are defined in the Course Editor.

Curricula are one or more related courses linked together. These are defined in the Curriculum Editor.

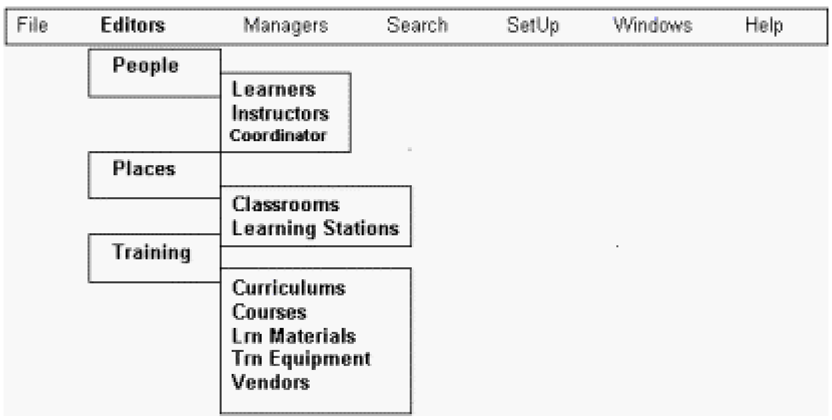
Materials are training resources used to facilitate learning and can be used for self-study, borrowed from a library or distributed. Examples include video tape, books and CD-ROMs. They are defined in the Material Editor.

Equipment is training equipment used to facilitate learning and can be used for self-study or for classroom instruction. Equipment can also be borrowed. Equipment is defined in the Equipment Editor.

Vendors are Distributors, Publishers, and other companies who provide you with training materials and equipment. Distributors are defined in the Distributor Editor.

Another way to access the Editors is through the drop-down menus. To access any of the Editors, click on Editors on the Main Menu Bar of AdminSTAR. Move your cursor down to People, Places or Training.

Click on one of these three choices and other choices will appear to the right. Move your cursor to the right and click on one of these choices. The graphic below shows all the available choices.



IMPORTANT NOTE:

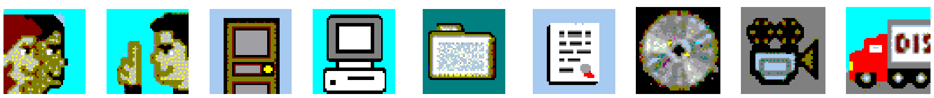
After entering and editing data in the Editors, you will be able to MANAGE this data in the Managers so you can manage your Classroom instruction, Multimedia Learning Centers, Equipment, Rooms and the Lending Library.

Editors

The AdminSTAR Editors

Editors are where you ADD, EDIT, and DELETE the information contained within AdminSTAR.

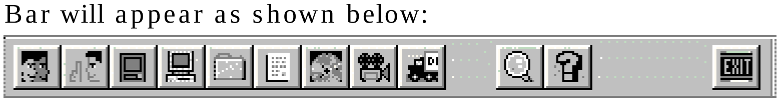
At the top of the AdminSTAR screen, you will notice a strip of picture icons below the Menu Bar. The group on the left represents the AdminSTAR Editors.



Learner Instructor Room Station Curriculum Course Material Equipment
Vendor

On the AdminSTAR screen, these buttons look like the picture shown below.

To change the buttons so they minimize, place your <u>mouse arrow</u> on this <u>Button Bar</u> and press the **right** mouse button. A command window will appear. Click on the phrase: **Show Text** and the Button Bar will appear as shown below:



Working with Editors

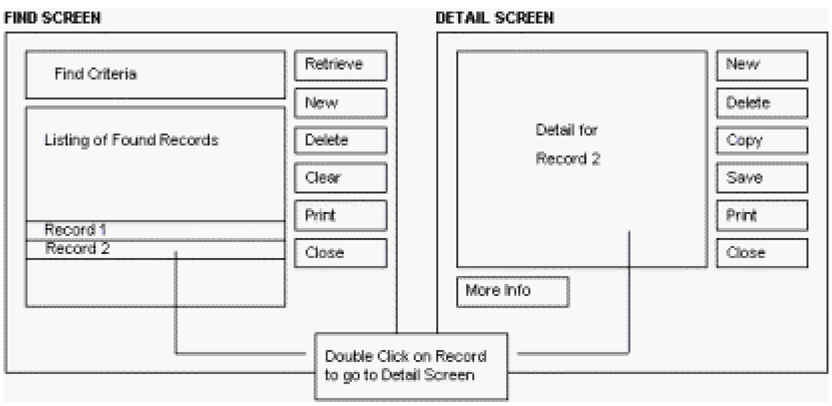
All the editors work the same, so if you understand how one editor works, you understand all the editors. Here are the general guidelines for working with editors:

Whenever you click on an Editor, (ex: Learner, Room, etc) you will immediately be brought to a **Find** Screen. The Find Screen is where you search for and retrieve data.

At the Find Screen, you can enter <u>Find Criteria</u> and click Retrieve to retrieve data. Depending on the criteria you've entered, you could retrieve a large listing of Found Records, just a small number, or just one specific record.

The graphic on the next page depicts the design of the Editor Find and Detail Screens. At the Find screen you enter in Find criteria and then click on RETRIEVE for a list of a records. You can also add a NEW record, DELETE a record, CLEAR the screen and start over, PRINT the listing or CLOSE the window.

At the Detail screen you can add a NEW record, change the information and SAVE the changes or make a COPY of the record (to quickly create another record similar to the last one).

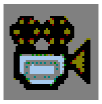


Buttons Used with FIND Screen

Buttons Used with EDIT Screen

***Important**: Notice that to move to the Edit Screen from the Find Screen, all you have to do is double-click on a specific record.*

The Equipment Editor



Equipment is defined as the various training hardware required during a Course or a meeting, such as VCRs, computers, podiums, microphones, projectors or monitors. Equipment may be reserved, checked out, and checked in. The EQUIPMENT EDITOR is where you log and track different *types* of Equipment. (The Equipment Manager, explained later on, is used to reserve and loan out these various Equipment types.)

To Create New Equipment:

1. Enter the Equipment Editor by clicking on the **Movie Camera** icon button.

2. Just as in the Materials Editor, you will enter *each* different TYPE of equipment that you have *once*, then you will create records for <u>EACH</u> physical copy of that TYPE of equipment. Begin this process by clicking on **New**.

3. Type in the Equipment Name/Type, ID Number, and any instructions there may be to operating the Equipment. Click **Save**.

4. Now, to add individual records for EACH physical copy of this Equipment type, click on the

Physical Copies button.

1. Click on **New**. A new screen will be brought up, and the Equipment Type that you are making a physical copy of will be shown, grayed out at the op of the screen.

2. Enter a Copy ID for the Equipment Copy. Use the drop-down list to select the appropriate Learning Center location. Enter a Contact and Phone number for the equipment if desired. Click **Save**.

3. If there are more Equipment Copies, you may enter them two ways:
   a. Click on the New button. This will give you a new screen in which to enter another copy. The original Equipment Type will appear at the top, and you will enter all other information. Click Save.

b. OR... If you know that you will have more than one Copy *at the same Learning Center*, click **Copy**. This will transfer all information, except for the ID, from the previous screen to a new screen. Click **Save** when finished.

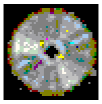
4. When you are finished entering Equipment Copies, click **Close** to close the Edit Equipment Copy screen. Click **Close** again to exit the Equipment Copies screen. If you want to enter more Equipment, click on the **New** button on the Edit Equipment screen. If you are finished entering copies, click **Close** to close the Edit Equipment screen.

User Fields Button

The other button is used to populate Dynamic User defined fields. They can be entered at anytime as ways to help store information that AdminSTAR might not already track for you. For Equipment this button appears also in the Physical Copies screen, so that you can have separate values for the Equipment title, then you have for the actual Physical Copies. See also Dynamic User Defined Fields (Appendix A.)

Note*: AdminSTAR will not let you delete Equipment (or any item) with data associated with it.*

The Material Editor



Learning Materials are used in classroom-delivered courses or self-study courses delivered at Multimedia Learning Centers. They are also loaned or distributed to Learners from a Multimedia Lending Library. For example, materials may be compact disks, laserdiscs, books, or audio and video tapes..

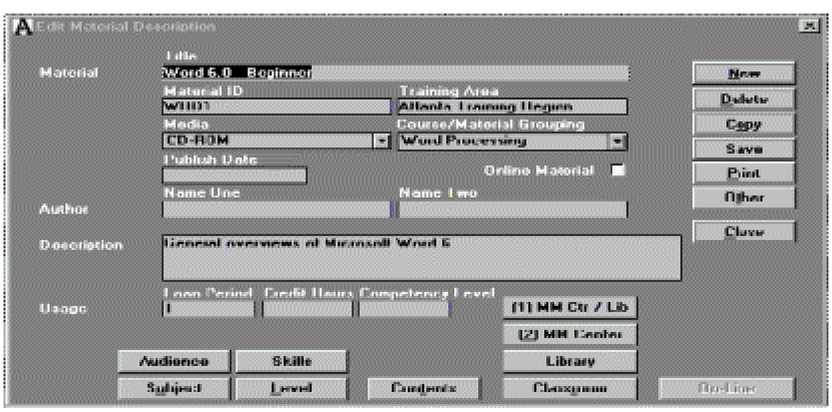
When creating Materials in this Editor, it is important to understand the difference between a MATERIAL **TITLE** and a MATERIAL **COPY**.

A MATERIAL **TITLE** is *not* a physical Learning Material object. Rather, it is the ***name*** of a Learning Material item. A Material Title is defined by its media type (book, tape, CD, etc.).

After defining a Material Title, you may then define individual copies of this Material Title. It is the **MATERIAL COPIES** that are actually used in Classrooms, Learning Centers, or Libraries.

**For example: You have 3 audio tapes and 2 CD's with the title, Introduction to Accounting. You will therefore create 1 TITLE for this Material. Then you will create the 3 loanable copies of the audio tape and 2 self-study copies of the CD. Each copy will have its own ID.

To Create Materials:



1. Click on the **Compact Disk icon button** (Materials) at the top of the screen and click **New**.

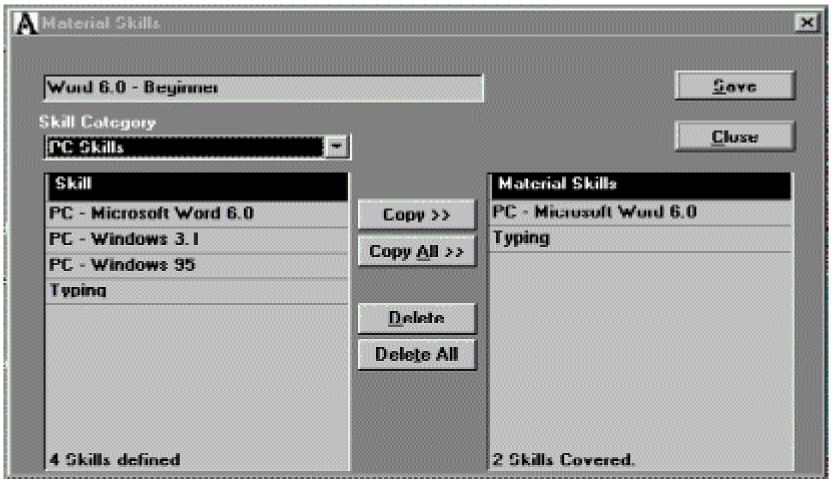
2. Enter all the necessary information by typing it in the various text fields. You can also use the drop-down lists to select Media and Course/Material Grouping.

3. When finished adding, click **Save**.

You can further define this Material by using the five (5) buttons at the bottom-left side of the Material Edit screen, i.e., Audience, Skills, Subject Level and Contents.

To see how to perform this further definition, we will use Skill as an example.

1. Click on the **Skill** button on the Material Edit Screen.



2. Select a skill in the Skill box on the left and click on **Copy**. This will move your selection over to the box on the right called Material Skills.

3. You may also double-click on the selection to copy it over. To copy all items, click on **Copy All**. To delete all items, click on **Delete All**. To delete one item, first select the item, then click on **Delete**.

4. By selecting a skill and then clicking on the TAB key, you are able to see the Skill Descriptions that have been previously defined Setup. When you are finished, click **Save** and **Close**.
5. Note with the Skills editor, you can use the drop-down to choose the Skill Category prior to selecting a skill to copy to the right.

6. Defining CONTENTS works somewhat differently. Here you simply type in a description of the contents for a given Learning Material. To do this, click on **Contents**. Type in the contents of the Material. For example, 2 audio cassettes, and 1 book.

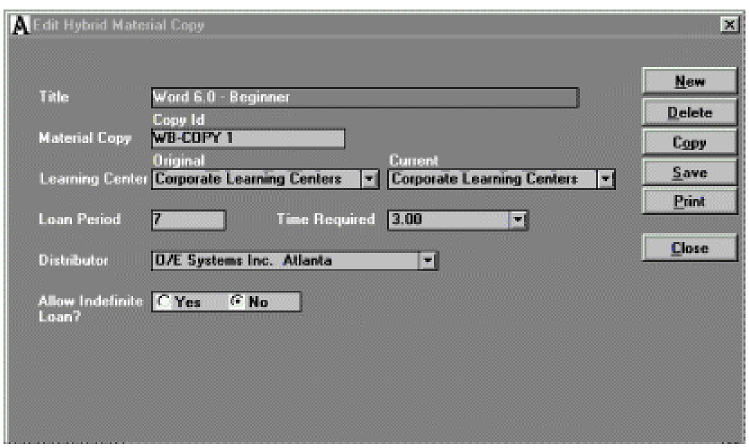
7. Click **Save** and **Close**.

Note: *If the material your are defining is loanable, make sure you enter a default Loan Period. Also, it is important to enter the contents of the material in the CONTENTS OF PACKAGE description area. This will be checked when materials are returned to the library to verify that everything that was loaned out has been returned.*

After defining the Learning Material TITLE as described above, the next step is to define HOW THE MATERIAL TITLE WILL BE USED. There are **FIVE** different ways to use a Learning Material.

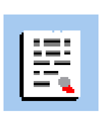
Multimedia Learning Center AND Library material

This button is for assigning material copies to **BOTH** the Learning Center for self-study scheduling AND for the Lending Library for loaning.



Type in the Material Copy ID, choose the Learning Center, type in the Loan Period for the Library (or use the default), choose the Default time required for the Learning Center, and choose a Distributor.

The Course Editor

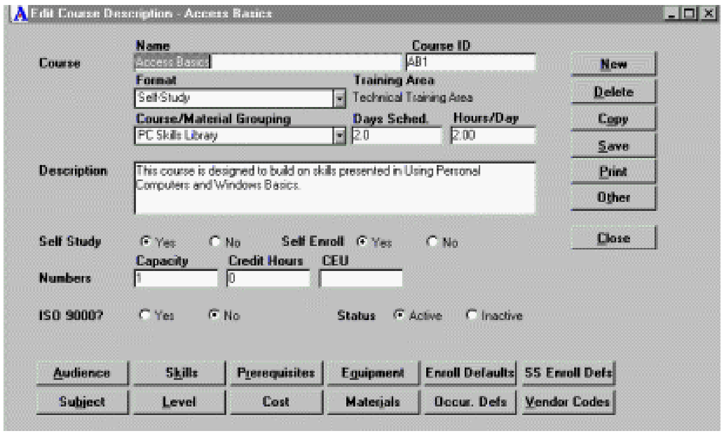


Courses are defined as the different class sessions that your organization offers and tracks in AdminSTAR. The Course Editor is where you enter and define all of your Courses. Courses can be **Group Study** (i.e., Classroom delivered with an Instructor) OR **Self-Study** (i.e., delivered in a Multimedia Learning Center at an individual Learning Station.

In the Classroom Manager, you will schedule and enroll Learners into classroom training sessions. In the Learning Center Manager, you will schedule and enroll Learners into multimedia self-study.

To Create New Courses:

1. Enter the Course Editor by clicking on the **Diploma Icon** button and click **New**.



2. Enter the Course Name, ID Number, Format type, Course/Material, Grouping, Length of the Course in Days, the Actual Hours/Days in Training, and a Course Description.

Note: *The required fields are Name, ID, Format, Course/Material Grouping and Capacity.*

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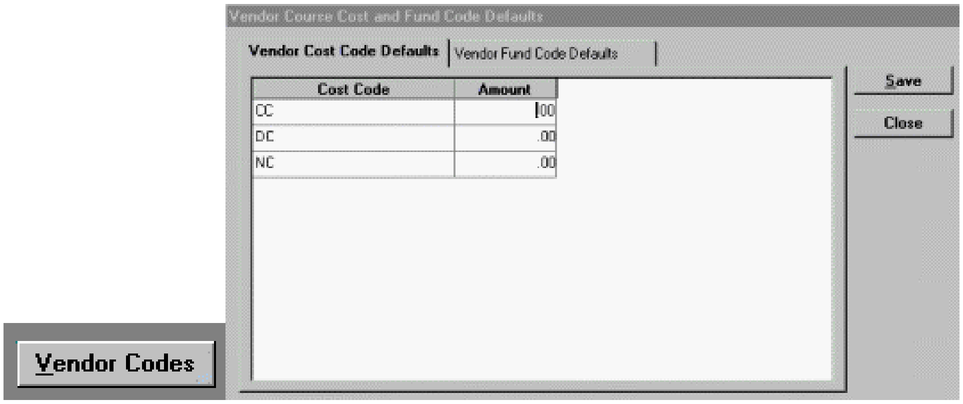
3. Indicate if the Course type is **SELF-STUDY**. If it is, then this course will be delivered at a Multimedia Learning Center. If it is not, (i.e., Group Study), then this course will be delivered in a classroom, taught by an instructor.

IMPORTANT Note: *Courses checked as SELF-STUDY are scheduled in the Learning Center Manager. Classroom-delivered courses are scheduled in the Course Manager.*

---

4. Indicate if the Course type is SELF-ENROLL. If it is, Learners with system access will be able to enroll themselves in this Course if they have the proper prerequisites.

5. Enter the Course Capacity, Credit Hours and CEU (Continuing Education Units). If applicable, check the ISO 9000 certification box for this course. Click **Save** when finished

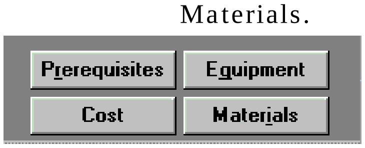


6. To enter default setting for Fund codes and Cost codes within the Vendor courses functions, Click the **Vendor Codes** button.

   a. From the Vendor Course Cost and Fund Code Default screen highlight the code(s) you wish to update and enter in the cost, or text associated with the Cost or Fund Code.
   b. When you click **Save** the defaults are set so that every time this course is used the set codes will automatically be assigned.
   c. The settings can be adjusted in the Vendor Courses enrollment screen within the Classroom Manager.

7. You can further define a Course by using the four (4) buttons at the bottom-left side of the screen: AUDIENCE, SKILLS, SUBJECT, and LEVEL. This section of the Course Editor works just like it did in the Materials Editor.

8. After defining a Course as described above, the next step is to further define Prerequisites, Equipment, Costs and Materials.



<u>Course prerequisites</u>

PREREQUISITES will determine if you can or cannot enroll a Learner in a course before they have taken another course.

<u>Equipment to be reserved for the Course</u>

EQUIPMENT will determine what is reserved during the scheduling of the course occurrence for a particular day.

Cost

These are the most common costs associated with a course, including Development cost, Session cost (i.e., per incident), Participant Cost (i.e., per student) and Indirect cost (i.e., travel, lodging, etc.)

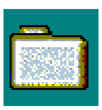
Materials for distribution during the Course

MATERIALS will help you establish an inventory so that during enrollment of learners, you can track distribution.

The procedure below explains how to define Course Prerequisites. The **SAME** procedure is used for defining Course Equipment and Materials.

Once you have set up a course in the **Course Editor** you can now assign certain default values. Users can enter default values for the User defined fields for Course Occurrences, Course Occurrences by day, Course Enrollments, and Self Study occurrences. These values will be held constant for each occurrence of the course, or Self-Study Enrollment. They can also be altered at the time of the Occurrence or Enrollment. Please see Dynamic User Defined Fields (Appendix A.) for more information.

The Curriculum Editor

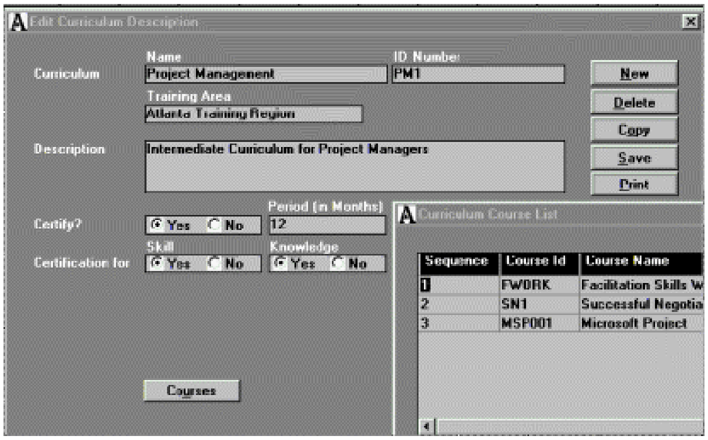


The Curriculum Editor is where various Courses are linked together to create a Curriculum.

Curricula are defined as groups of Courses designed to be taken in a predetermined sequence. Curricula may be associated with Job/Skill Sets. These Job/Skill Sets can be associated with a Learner's Individual Development Plans (sometimes called Career or Learning Track).

To Create a New Curriculum:

1. Click on the **File Folder Icon button**, then click **New**.



2. Enter the Curriculum Name and ID Number (these are required fields), and a description. Click whether or not **certification** is offered at completion, and enter how long (in months) the certification is valid. You can also indicate whether the certification is for Skill or Knowledge. When finished, click **Save**.

3. Click on the **Courses** button to assign the Courses for this Curriculum.

4. Click on the **Add** button. You are now in the FIND COURSES screen from the Course Editor. Enter search criteria if desired and click **Retrieve**. To add Courses to the Curriculum, double-click on the desired **Course**, or highlight the Course and click on **Add to List**. To add more than 1 Course at the same time, highlight all desired Courses, then click on **Add to List**. All highlighted rows will be added to the list.

Note: *The order that you click on the Courses in the FIND COURSES TO ADD TO CURRICULUM screen is <u>important</u> since it determines the <u>sequence</u> that the courses must be taken in. However, you can always rearrange the sequence by placing your cursor in any of the Sequence fields, typing in a different sequence number and then clicking Save.*

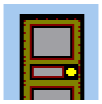
---

1. To delete a Course that is on the Curriculum Course List, enter the Curriculum Course List screen, highlight the Course and click **Delete**, then click **Yes** to confirm.

2. Click the **Close** button. The Courses you have just selected are now in the CURRICULUM COURSE LIST pop-up window. To add more, use the **Add** button again. Click **Save** and **Close** when finished.

3. Click **Close** to exit the Edit Curriculum Description screen.

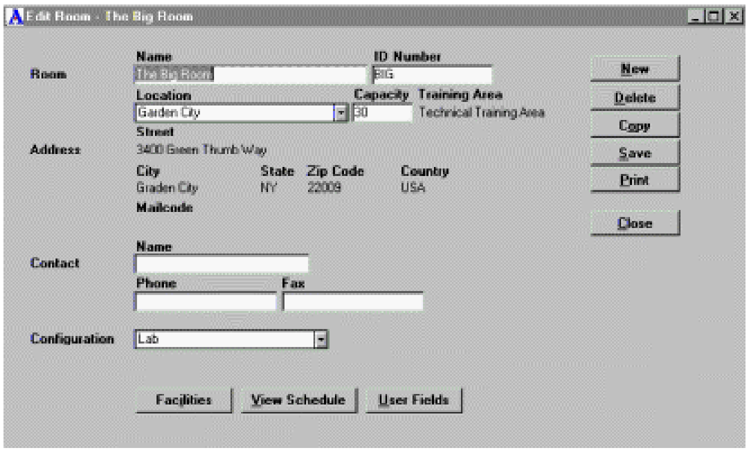
The Room Editor



In the Room Editor, information is entered for the various Rooms in which Courses may take place. Room facilities and features are also entered here.

To Create Rooms:

1. Click on the **Room Editor** icon and click **New**.



2. Type in the appropriate information. (Name, ID, Location and Capacity are required fields. AdminSTAR will not let you save without this information.) Click **Save**.

3. Now click on the **Facilities** button. Define Room Facilities by double-clicking on a selection in the **Room Facility** box. Or, you may highlight selections and click **Copy**. To delete a selection, highlight the item in the FACILITIES IN THE ROOM box on the right, and click **Delete**. You may copy all and/or delete all selections by clicking the **Copy All**, or **Delete All** buttons. When finished, click **Save**, then **Close**.

Note*: After you use the Room Manager to create Room schedules, you will be able to click on the View Schedule button to view the reservations and activities for a particular Room. The Room Manager is explained later.*

Tip**:** If there is more than one Room at the same Location, you may click on the **Copy** button. Using this button will copy all information from the current screen (except for Name and ID Number) to a new screen. You may then type in the new Room Name and ID information.

To Edit/Delete an Existing Room:

1. Click on the **Room Editor** icon.

2. Enter search criteria if desired and click **Retrieve**.

3. Double-click on the **Room** you want to edit. Make changes, then click **Save** and **Close** when finished.

User Fields Button

The other button is used to populate Dynamic User defined fields. They can be entered at anytime as ways to help store information that AdminSTAR might not already track for you. See also Dynamic User Defined Fields (Appendix A.)

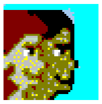
Note: *If you try to change the Name and/or ID of an already existing Room, AdminSTAR will ask you if you are sure you want to make that change. If you do change the Name or ID, remember that everything in the database associated with the old Name or ID is now associated with the new Name or ID.*

You may delete a Room in the FIND ROOMS screen by highlighting it, and clicking **Delete**.

Or, you can bring up the Room up in the EDIT ROOMS screen, and click **Delete** there.

Note: *AdminSTAR will not let you delete any Room with a past, present, or future schedule associated with it. If you try to delete a Room with a schedule, AdminSTAR will warn you with the message, ADMIN - 567: This Room has a future schedule, schedule history, or is scheduled for a Course. Cannot delete a Room with a schedule or with schedule history. Must archive old data.*

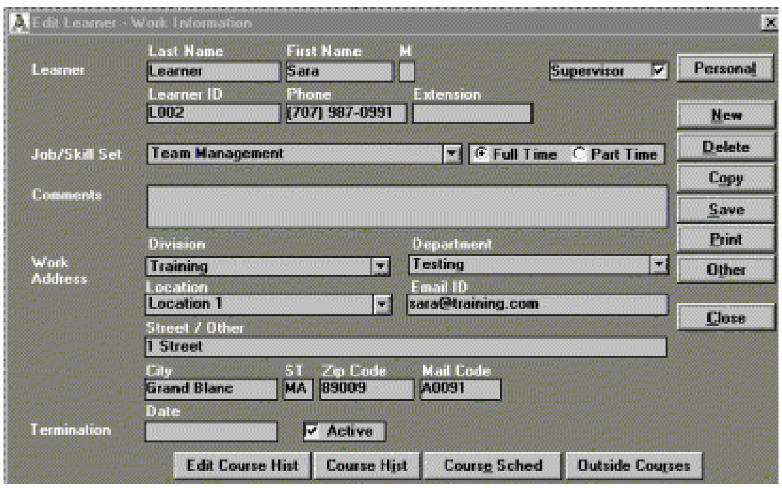
The Learner Editor



The LEARNER EDITOR is where all information on Learners is entered and modified.

To Create a Learner:

1. Click on the **Learner icon button** at the top of the screen, then click **New**.



2. Enter all of the information by typing it in, or clicking on a drop-down arrow list.

3. Click **Save**. Now you may define this Learner in more detail by entering information using the buttons at the bottom of the screen.

Note: *You can also create a supervisor by selecting the Supervisor box. This will be used in the Learner Login area of AdminSTAR.*

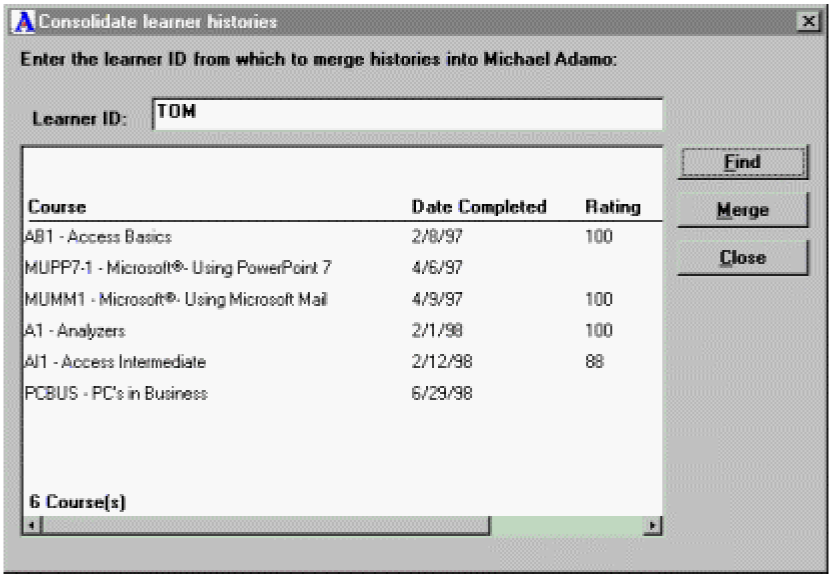
Edit Course Hist button

1. This screen brings up the Learner's history of ALL courses COMPLETED. This screen allows you to edit the course history for a learner on an individual basis.

How to transfer a learner's Course History to another learner.

1. To transfer this history information select the learner whose history will be updated and click the **Edit Course Hist** button.

2. In the **Edit Course History** screen click the **consolidate** button. This will pull up the **Consolidate Learner Histories** screen.



3. Select the learner whose history you wish to move to the current learner. You must enter the learners complete ID. There is no Find Learner screen associated with this function.

4. When a learner has been selected click the **Merge** button. The entire course history of one learner has now been moved to the current user.

Course Hist button

This screen brings up the Learner's history of ALL courses COMPLETED.

Courses Sched button

This screen brings up the list of history of ALL courses the Learner is scheduled to take.

Outside Courses button

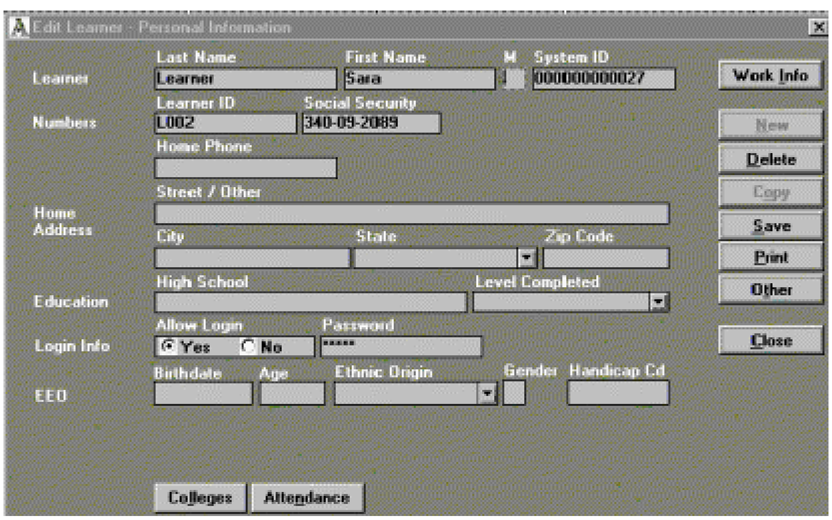
Enter information to be tracked on relevant courses that the Learner has taken outside of work. To add another course, click on **Add**. This will add another line for entry. To Delete a course, highlight the course, and click **Delete**. Click **Save** and **Close** when finished.

You can add the following information into the Outside Courses for a learner:

1. Date Started - Date Completed
2. Course Name and Course ID
3. Credit Hours and Cost
4. School Name
5. Internal Course Equivalent
6. Reason Taken
7. Reimbursement and Percent
8. Reimbursement Date

Personal (Personal Information) button

1. Enter relevant information and click **Save**. Notice, you can add birthday (age will be calculated - need to add year as 1956, i.e., 4 digits), ethnic origin, gender and handicap code. The handicap code allows you to run reports in order to make sure the classroom or location has the necessary facilities.



Colleges and Attendance Buttons

1. Enter relevant information and click **Save**.

Now that you have entered all pertinent information about the Learner, click **Save** once again, then **Close**. You are now back at the FIND LEARNERS screen.

Note: *Fields for Last Name, First Name, Learner ID, 1st Hierarchy, 2nd Hierarchy, and Location are all required fields. IDs must be a unique value for each Learner. AdminSTAR will not let you save unless this data has been entered.*

If you have more than one Learner that works in the same Position at the same Location, Division and Department, click on the Copy button to make a copy of an already existing Learner's Work Information. By clicking Copy, the phone number, Position, and Work Address information will be copied. You will need to fill in all the other personal Information, as well as fill in the information using the buttons at the bottom of the screen. Click Save when finished.

If you are just setting up AdminSTAR and have not entered any information into the Course Editor yet, there will not be any data or Courses available to assign to a Personal Curriculum. You must have Courses entered before you assign a Personal Curriculum. So, if you are setting up AdminSTAR, skip the Personal Curriculum for now, and come back to it after having entered your Courses in the Course Editor.

Learner User Defined Labels

You can add up to 15 User Defined Labels for a learner. To view the specified User Defined Labels for the learner, click on the **Other** button in the Edit Learner Description screen.

To Edit/Delete Learner data:

1. Click on the **Learner icon button**. Enter any desired search criteria in the search fields, then click **Retrieve**.

2. Double-click on the **Learner name** you want to edit. When the Learner's record is shown in the Edit Learner-Work Info. screen, you may type in the changes.

3. Click **Save** when finished.

Note: *You may narrow a search even further by using the SORT BY radio buttons in the bottom right-hand corner of the screen. The SORT BY radio buttons will sort the data by last name, Division, Department or Location, and put it in alphabetical order. This is helpful if you are retrieving a large list of data. Also, note that clicking the CLEAR button will wipe out all existing search criteria in the search fields, and allow you to enter new criteria without having to delete the criteria in each field.*

If you try and change a Learner's Last Name, First Name or ID, AdminSTAR will ask you if you are sure you want to make that change. When you change an already existing Learner's Name or ID, everything in the database originally associated with old Name or ID is now associated *with the new Name or ID. For example, a Learner named Jane Smith has recently married. She now goes by the name Jane Smith-Jones. After that change is made in the database, all records previously associated with Jane Smith will now be associated with Jane Smith-Jones.*

4. To delete from the FIND LEARNER screen, enter search criteria if desired, and click on **Retrieve**. From the box below, highlight the **Learner** and click on **Delete**. Click **Yes** to confirm.

5. You may also delete a Learner from the EDIT LEARNER WORK INFO. screen.

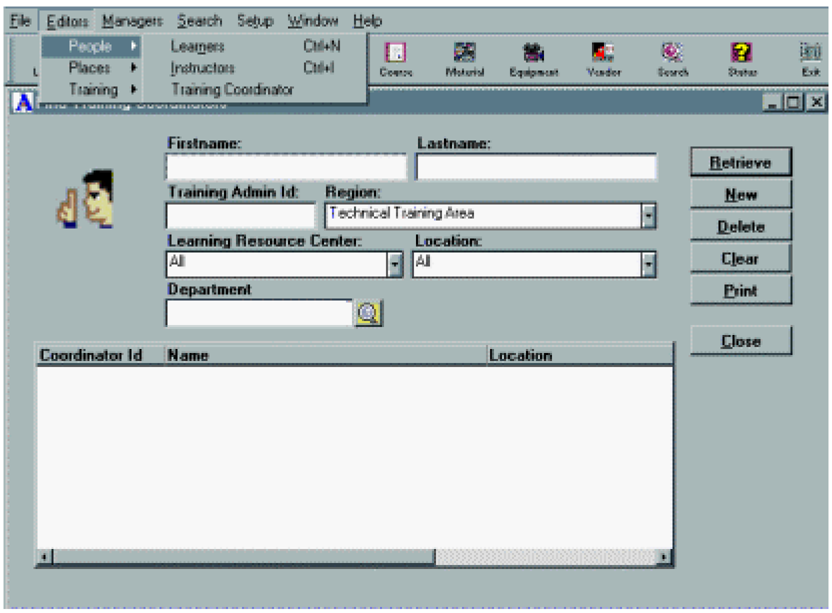
After retrieving the Learner's Work Information, click on **Delete**. Click **Yes** to confirm. Deleting a Learner completely takes them out of the database.

Note: *AdminSTAR will not allow the deletion of a Learner who is referenced elsewhere in the database.*

Training Coordinator Editor

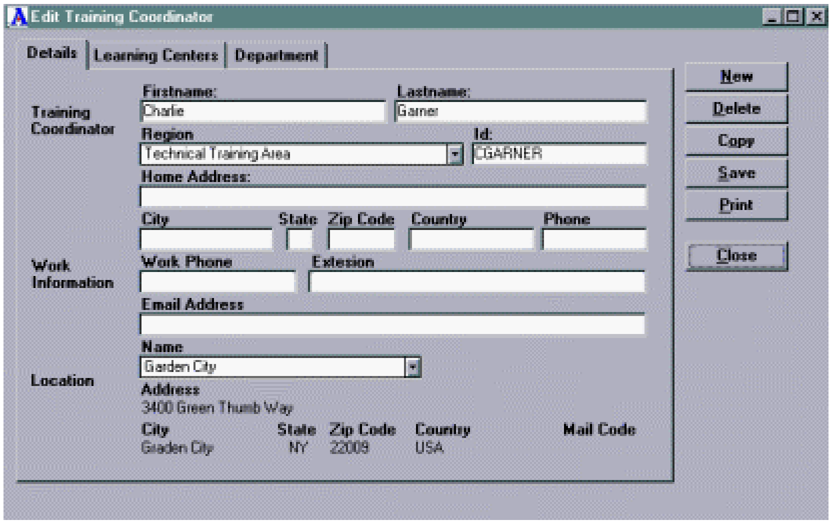
The Training coordinator is an individual that can be associated with Classroom training events (separate from an instructor or a guest speaker) and with Learning station events within AdminSTAR.

Access to the Training Coordinator Editor screen can be gained by going to the Editor pull-down menu, select People, and at the bottom of the list is the Training Coordinator option. Selecting this option will open the Training Coordinator Editor screen. This editor works in a similar fashion to the other editors within AdminSTAR.



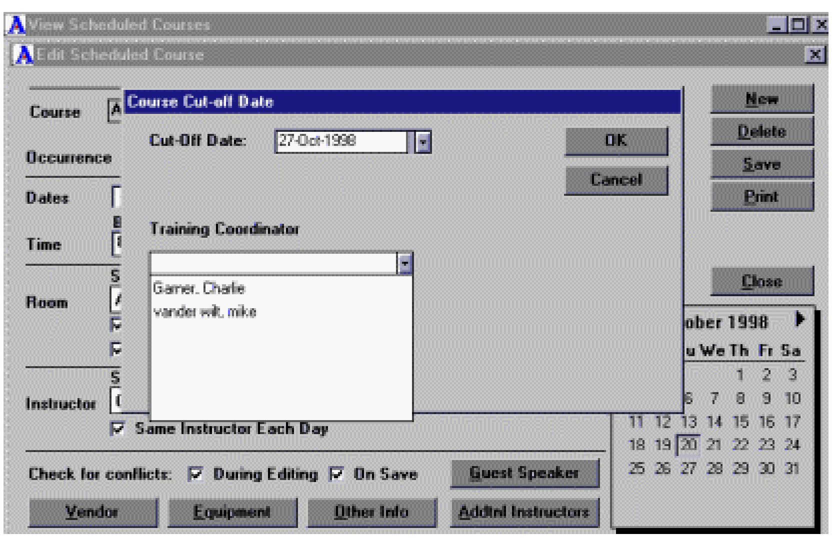
Once you are at the View Training Coordinator screen, you can double click on a Coordinator to pull up their information, or you can select **new** to add a new Coordinator. The **Delete** button will delete the highlighted coordinator. The **Clear** button clear your search criteria from the find screen. And the **Print** button will print the information from this screen. **Close** closes the Find Training Coordinator Screen.

After clicking on **New** or double clicking on a coordinator's name AdminSTAR will advance to the Edit Coordinator screen.

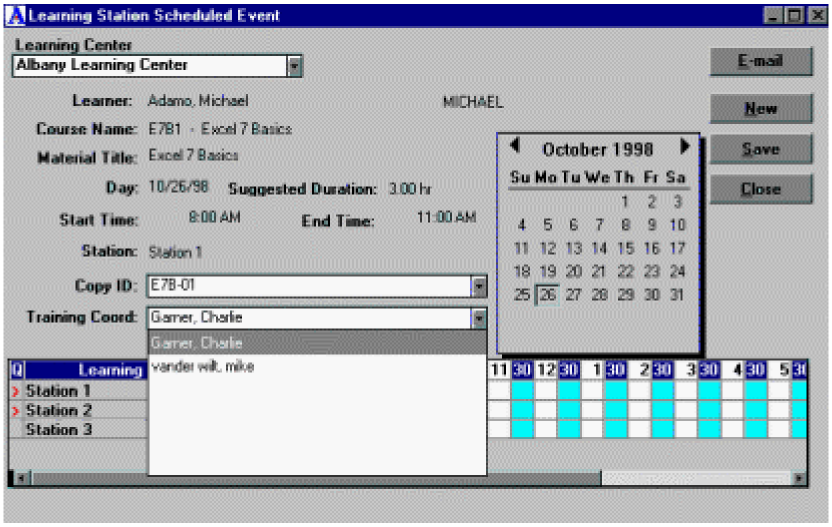


Here you can enter in all of your information for the Training Coordinator. By selecting the tabs at the top of the screen, we can move on to identify the Learning Centers, and Departments that a Training Coordinator can be associated with. And the buttons to the right maintain the functionality found in the other Editor within AdminSTAR. (see the **Working with Editors** section within the General Users manual, or the AdminSTAR help files.)

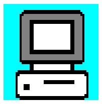
The Training Coordinators can be associated with stand up training through the Classroom Manager. Go to the View Scheduled courses screen and double click on a course occurrence. From the Edit Scheduled Courses screen, click on the **Other Info** button. This will display a pull down menu for selecting a Training Coordinator to identify with this course.



Training Coordinators can also be associated with Self Study Occurrences. They are tied to the actual scheduling of a material to a learning station. You can attach a Training Coordinator to a Self-Study Schedule by selecting a learner enrollment and then continuing to the Learning Station Scheduled Event screen. From this screen you can associate a Coordinator for each scheduled occurrence for this course.



The Multimedia Station Editor

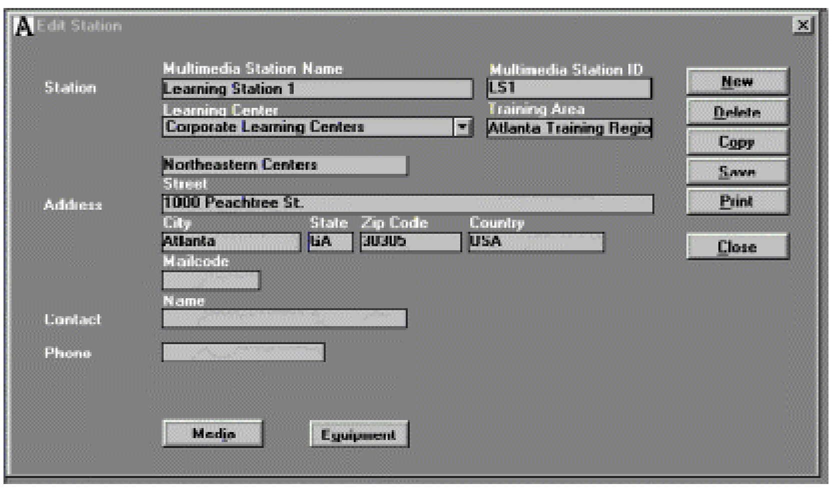


The Multimedia Station Editor is where you enter and define the various Multimedia Stations at which Multimedia training will take place. MEDIA and EQUIPMENT for each station is defined here as well.

To Create Stations:

1. Click on the **Station Editor icon** (Personal Computer).

2. Select the Learning Center from the drop-down list and click **New**.



3. Type in the appropriate information. (Remember that Station Name and ID are required fields. AdminSTAR will not let you save without this information.)

4. Click **Save**. Notice that the Training Area, Location and Contact information is filled in for you.

Media button

Define the Station's Media by double-clicking on a selection in the Media Choices box. Or, you may highlight selections and click **Copy**. Stations can have more than one media associated with them. To delete a selection, highlight the item in the MEDIA HANDLED BY STATION box on the right, and click **Delete**. Also, you may copy all and/or delete all selections by clicking the **Copy All**, or **Delete All** buttons. When finished, click **Save**, then **Close**.

***Note**: It is **IMPORTANT** and **NECESSARY** that you select the **CORRECT** Media for each Station. This is how AdminSTAR knows which Multimedia Learning Station to assign for delivery of a specific Multimedia Learning Material.*

Equipment button

Define the Station's Multimedia Training Equipment by double-clicking on a selection in the EQUIPMENT box. Or, you may highlight selections and click **Copy**. You may also add a Serial Number for each piece of equipment that is located at that Station. Just click into the **Serial Number** field and type the serial number. To delete a selection, highlight the item in the Equipment box on the right, and click Delete. Also, you may copy all and/or delete all selections by clicking the **Copy All**, or **Delete All** buttons. When finished, click **Save**, then **Close**.

User Fields Button

The other button is used to populate Dynamic User defined fields. They can be entered at anytime as ways to help store information that AdminSTAR might not already track for you. See also Dynamic User Defined Fields (Appendix A.)

***Note:** It is OPTIONAL, not necessary, to assign equipment to a Station. You might want to do this however to track various pieces of equipment by serial number.*

To Edit/Delete an Existing Station:

1. Click on the **Learning Station Editor** icon. (Personal Computer)

2. Enter search criteria if desired and click on **Retrieve**.

3. Double-click on the **Station** you want to edit. Make changes to the Name, ID or Media and Equipment associated with the Station. Click **Save** and **Close** when finished.

***Note:** If you try to change the Name and/or ID of an already existing Station, AdminSTAR will ask you if you are sure you want to make that change. If you <u>do</u> change the Name or ID, remember that everything in the database associated with the old Name or ID is now associated with the new Name or ID.*

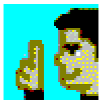
4. You may delete a Station in the FIND STATIONS screen or the EDIT STATION screen.

5. While at the Find Stations screen, highlight the **Station** name and click on **Delete**.

6. In the Edit Station screen, just click on **Delete**.

Note: *AdminSTAR will not let you delete any Room with a past, present, or future schedule associated with it. If you try to delete a Room with a schedule, AdminSTAR will warn you with the message, ADMIN - 567: This Room has a future schedule, schedule history, or is scheduled for a Course. Cannot delete a Room with a schedule or with schedule history. Must archive old data.*

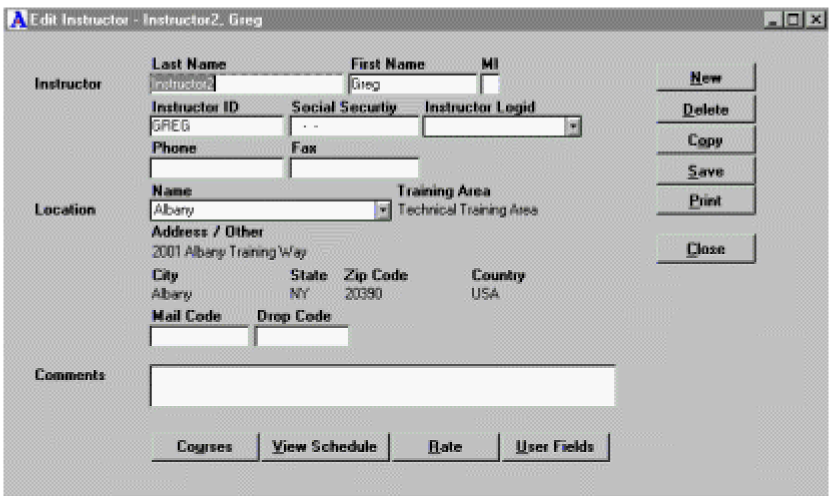
The Instructor Editor



The Instructor Editor is where you create and edit Instructor data and associate them to the various Courses listed and tracked in AdminSTAR. Instructors are the people who teach the Courses. Later, in the Course Manager, you will assign Instructors to teach the various Courses.

To Create an Instructor:

1. Click on the **Instructor Editor icon** at the top of the screen and click **New**.



Note: *Last and First Name, ID and Location are required information fields. AdminSTAR will not let you save until this information is entered.*

2. Enter the appropriate information for the Instructor and click **Save**.

Courses button

This button will allow you to enter the Courses that this Instructor is qualified to teach.

1. Click on **Add**. Notice that you are now back in the FIND COURSES screen, from the Course Editor.

2. Enter search criteria if desired, and click on **Retrieve**.

3. You may add a Course to the Instructor Qualification List by double-clicking on it, or by highlighting it, then clicking on **Add to List**. If you want to add more than 1 Course at a time, highlight the selected Courses and click on **Add to List**. AdminSTAR will add all highlighted rows to the list. When finished, click **Close**. You are back in the COURSES INSTRUCTOR IS QUALIFIED TO TEACH pop-up window. Notice that the Courses you just added are now listed here. You may add more by clicking on **Add**.

4. When finished, click **Save** and **Close**.

Note: *You may delete a Course while in the COURSES INSTRUCTOR IS QUALIFIED TO TEACH pop-up window by highlighting it , and clicking on* ***Delete*** *and answering* ***Yes*** *to confirm.*

View Schedule button

1. If you want to view the Instructor's Schedule of the Courses they are teaching, click on View Schedule. *If* an Instructor has been scheduled to teach a Course (using the Course Manager), that Course will show up in the Instructor Schedule screen.

2. If the Instructor has not been assigned to a Course, there will not be any data to view in this screen. This screen will be very helpful when using the Course Manager to schedule Courses and assign Instructors. Click Close to exit the Instructor Schedule screen.

Rate button

Type in the Instructor's Rate without entering the zeros. For example, if the Fee is $34.00, type in 34. Click Save. Upon Saving, AdminSTAR will automatically add the zeros. Click **Close**.

User Fields Button

The other button is used to populate Dynamic User defined fields. They can be entered at anytime as ways to help store information that AdminSTAR might not already track for you. See also Dynamic User Defined Fields (Appendix A.)

Tip: *If you have more than 1 Instructor at the same Location, click on the Copy button to save some time. Clicking on this button will create a new instructor record by copying all of the Location information from the current* *screen, onto a new screen. Remember to enter Name, ID and other information.*

To Edit/Delete an Existing Instructor:

1. Click on the **Instructor Editor** icon and enter search criteria, if desired, and click on **Retrieve**.

2. Double-click on the **Instructor** to be edited. Make your changes, then click **Save** and **Close**.

3. Enter search criteria if desired and click **Retrieve**, highlight the Instructor and click **Delete**.

4. Or, you may click **Delete** while in the EDIT INSTRUCTOR screen.

Note: *AdminSTAR will not let you delete any Instructor who is scheduled to teach a Course, or has taught a past Course. If you try to delete an Instructor with history, AdminSTAR will warn you with the message, ADMIN - 564: This Instructor either is currently scheduled to teach a Course or has history in the database. History must be archived before deleting. Cannot delete.*

The Vendor Editor

The Vendor Editor is used to track the training VENDORS that provide various Learning Materials to your organization. These Vendors may provide books, audio cassettes or any other type of Learning Material used in Classroom instruction, self-study training in a Learning Center or loaned out from a Lending Library. Later, the Lending Library Manager will be used to order Distributable materials from vendors identified in the Vendor Editor.

To Create a Vendor:

1. Click on the **Truck Icon** button, then click on **New.**

2. Enter the Name ID and Address of the Vendor. You can also add information on Contact Name, Phone or Fax number. (Name and ID are required fields. AdminSTAR will not let you save a Vendor record without information in these fields.)

3. Click **Save**.

4. Click on **New** again to enter another Vendor. Repeat steps 2 and 3 above.

5. Clicking on the **Materials** button will show you all the Materials that have been associated with this particular Vendor.

IMPORTANT NOTE: *Initially, this screen will be blank because this information is entered in the Material Editor which will be explained next.*

To Edit/Delete an Existing Vendor:

1. Click on the **Truck Icon** button.

2. Retrieve the desired Vendor by entering search criteria (if desired) and clicking the **Retrieve** button.

3. Double-click on the desired Vendor in the box below. Once the Vendor is brought up on the screen, you may make any changes. When finished, click Save then Close.

4. To delete a distributor in the FIND VENDORS screen, click **Retrieve**. Highlight the Vendor in the box below and click **Delete**, then click **Yes**.

5. To delete a distributor in the EDIT VENDOR screen, and click **Delete**, then click **Yes**. Click **Close** to exit the Edit Vendor screen. Click **Close** once more to exit the Find Vendors screen.

User Fields Button

The other button is used to populate Dynamic User defined fields. They can be entered at anytime as ways to help store information that AdminSTAR might not already track for you. See also Dynamic User Defined Fields (Appendix A.)

***Note**: AdminSTAR will not let you delete a Vendor (or any item) that has data associated with it.*

To Make an Instructor Record From a Learner:

You may make an existing Learner into an Instructor very easily while in the LEARNER EDITOR. By clicking a button, all of the Learner's general information is copied to a new Instructor record.

1. Click on the **Learner Editor icon**. Enter search criteria if desired, and click on Retrieve.

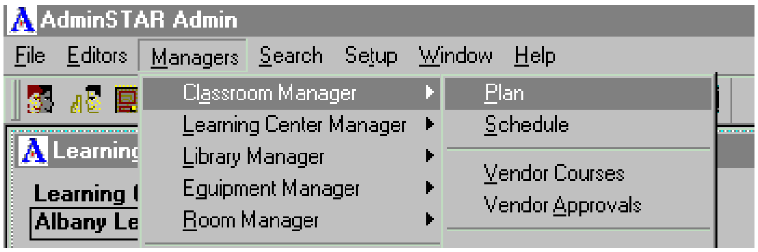
2. Select (highlight) the desired Learner from the box below. Now click on the Instructor button. Click **Yes** to confirm. An instructor record has now been created from the Learner's record.

***Note**: If you have created an Instructor through the Learner Editor, and you want to delete this person later, you must delete **each** record in **both** Editors. When you delete a Learner/Instructor from the Learner Editor, you are only deleting that person's Learner record. In order to delete that person's Instructor record, you must enter the Instructor Editor, and delete it there. Use of the Instructor Editor is explained later.*

AdminSTAR Managers

The five (5) Managers are the most important part of the AdminSTAR program. This is where you will perform all scheduling and tracking of Courses, Materials, Equipment, Rooms and Multimedia Learning Stations.

They can be accessed by clicking on the Managers drop-down menu selection, located on the menu bar of the main AdminSTAR screen.



In order, from top to bottom, they are:

The Classroom Manager

In the **Classroom Manager**, you can Plan future training programs, schedule Courses, Instructors and Rooms, enroll Learners, create Wait Lists for Courses, track Course Attendance and Completion, create training history records and print up Reports.

The Learning Center Manager

In the **Learning Center Manager**, you can enroll Learners into Self-Study courses, schedule Learners to take self-paced training at multimedia learning station and track their completion.

The Library Manager

In the **Library Manager** you can Loan and Return Materials, Extend due dates, place Learners on Wait Lists, Hold items, Distribute Materials, keep track of Inventory Orders and create Memos and Reports.

The Equipment Manager

In the **Equipment Manager**, you can Reserve, Check In and Check Out Equipment. You will also be able to view Equipment currently checked out, or reserved, as well as create related Reports.

The Room Manager

In the **Room Manager**, you can Reserve Rooms for meetings and activities (other than Courses), track Room reservations and print Room Reports.

Classroom Manager

The Classroom Manager consists of two major functions, **planning** and **scheduling**.

Planning

The course manager allows you to PLAN classroom training as well as SCHEDULE it. Planning is optional. You <u>do not</u> have to use the Planning option to schedule courses in AdminSTAR.

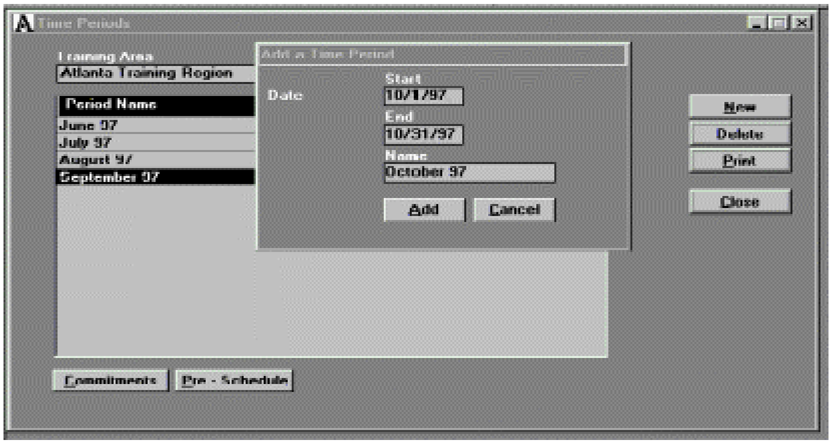
To set up a training plan, you first create a *Time Period*. Next, record the number of learners each Department *commits* to <u>each</u> of the courses offered in <u>each</u> of the Training Areas during that Time Period. This establishes a training budget for the number of learners committed for training for that particular time period.

Once the commitments have been entered, you can then have AdminSTAR calculate the number of courses and materials required for all the courses for that time period. In addition, you can have AdminSTAR *pre-schedule*, i.e., set up the preliminary a schedule listing for all the courses. Then all you have to do under Scheduling is enter dates, times, rooms and instructors for all the courses that have been planned. You begin planning by identifying a time period.

Scheduling (Commitments and Pre-Scheduling)

To Create Time Periods:

1. Click on the **Plan** button, then click **New**.



2. Type in the start and end dates and the name of the Time Period and click **Add** (if you make a mistake here, click Cancel.) The indicated Time Period is added.

3. Click **New** to add more Time Periods until all needed periods are entered.

4. Click **Close** when finished.

Note: *The dates of a Time Period cannot overlap, so the next Time Period you create will always begin after the end of a selected Time Period.*

To Create a Preliminary Schedule:

While in the PRE-SCHEDULE REPORTS screen, click on the **Make Schedule** button.

See Also To Create Commitments

Note: *These preliminary schedule listings will appear in the Schedule section of the Course Manager. You will need to go to this section and enter the day(s) and times that the course will occur on, and the room and instructor information. AdminSTAR will show the you Materials required for the Time Period. It will also detail the inventory level and display quantity(s) of Materials needed.*

To Create Commitments:

Commitments are the preliminary number of people that each Department is committing (pledging) to send to a given Course during a given Time Period. This information is then used to determine how many Courses will be needed in order to accommodate the number of Learners pledged (i.e., committed) to attend the Course. To create Commitments:

1. Click on the **Plan button** on the COURSE MANAGER screen.

2. Select the Training Area and Time Period for which you are creating Commitments. Then, click on the **Commitments** button in the Time Periods screen of the Course Manager.

3. Click on the **Add** button. Select the Department and Course Name for this particular Commitment from the drop-down lists.

4. Enter the number of Learners pledged to this Course in the **Number Committed** field. Click the **Tab** key. AdminSTAR will automatically calculate how many dollars are being committed based on the cost of the Course.

5. To add more Commitments for the same Time Period, click on the **Add** button again. To add Commitments to a different Time Period, click **Close** to go back to the Time Periods screen, then select a different Time Period and follow the steps above.

6. Click on the **Save** button and then **Close** when finished.

To Delete Commitments:

1. In the TIME PERIODS screen, select the Time Period of the Commitments that you want to delete. Click on the **Commitments** button.

2. Select (highlight) the Commitment that you want to delete, then click the **Delete** button.

3. Click **Yes**. The Commitment is deleted.

To Generate Planning Reports for Courses:

1. From the Pre-Schedule Reports pop-up window, you can print Planning Reports for all Courses listed on the screen by clicking the **All Courses** button and clicking on **Yes**.

2. Or, you can first highlight (select) a specific Course and then click on the **Selected Course** button, then and click on **Yes** to confirm.

Note: AdminSTAR will create a preliminary schedule for all the Courses listed in the gray box that have not already been scheduled.

To Use Pre-Schedule Reports:

The Pre-Schedule Reports screen is a very helpful tool in AdminSTAR. This screen will show you the total number of persons committed for a Course, and calculate the number of Course occurrences required. You can print out Planning Reports for All Courses, or a Selected Course.

Information on this screen may be translated into a preliminary schedule that lists the Course Occurrences needed in order to fulfill the expected enrollment and Commitments. To use the Pre-Scheduled Reports screen:

1. Click on **Plan** in the COURSE MANAGER.

2. Select the desired Time Period for which you will produce the Pre-Schedule Reports. Click on the **Pre-Schedule button**.

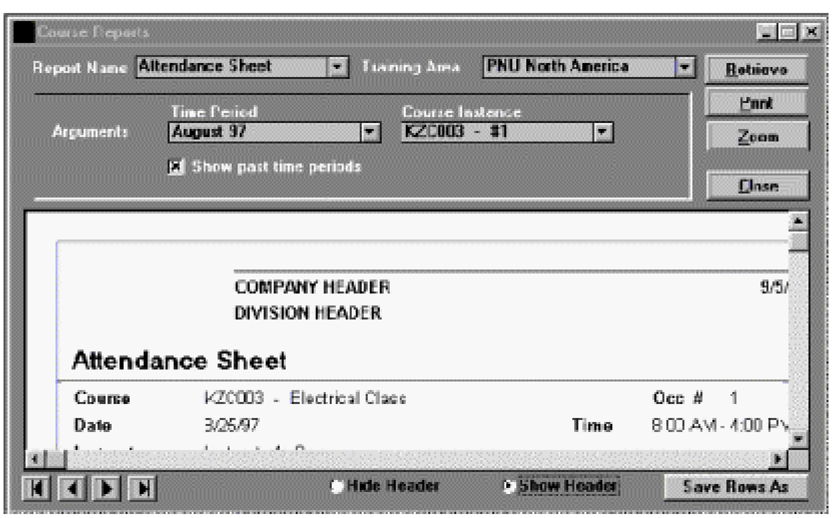
3. All of the Courses that have Commitments will now be shown.

Note: AdminSTAR will display the Course Name, Capacity, Number Committed, and the Number of Course Occurrences needed. You can generate Planning Reports and create a preliminary schedule listing from the Course Occurrences.

Creating Course Reports

1. From the COURSE MANAGER screen click on **Reports** button.

2. Choose the report name by clicking on the *Report Name* drop down field.

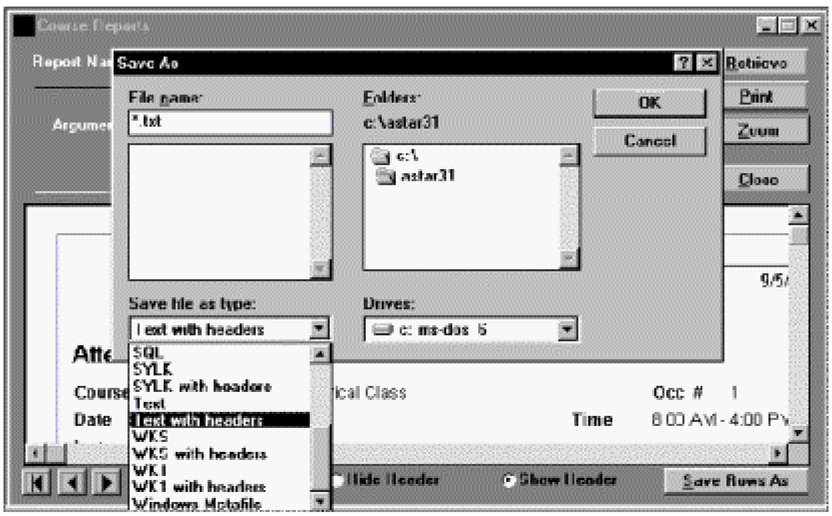


3. Enter the arguments for retrieval such as, Time Period and Course Instance.

4. Click on the **Retrieve** button.

5. In order to show a report header, select the **Show Header** radio button.

6. To save report in file format, click on the **Save Rows As** button and choose file format.



In order to include the heading in the saved report file, then select the ***Include Headers*** *radio button.*

Scheduling

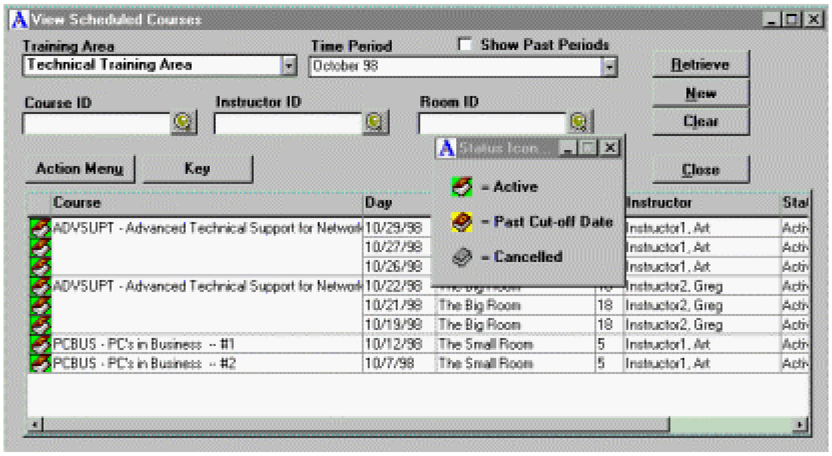
We will assume that if you skipped the previous section on Planning, you still created a Time Period. **If not, go back and create Time Period(s) and then proceed with Scheduling.**

Now you can create a NEW COURSE SCHEDULE by choosing a course and entering dates, times, rooms and instructors. You can also associate learning materials and equipment to the Course schedule.

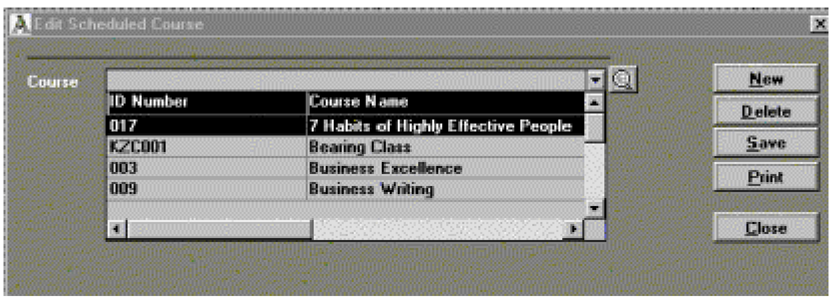
After schedules are created, you can 1) reserve seats, 2) enroll learners, 3) place learners on a wait list, 4) record attendance, 5) course completion and 6) record class surveys.

To Schedule Courses in the Course Manager:

1. Click on the **Schedule** button and you will go to the **View Scheduled Courses** screen.



2. Select the Time Period in which this Course will take place (top



3. Click on **New**. Then select the Course you want to schedule from the drop-down list.

Note: The spy-glass button allows you to search for courses by the individual name. You may also use the % as a wild card search.
For example, Tra% would bring back all of the courses that begin with Tra.

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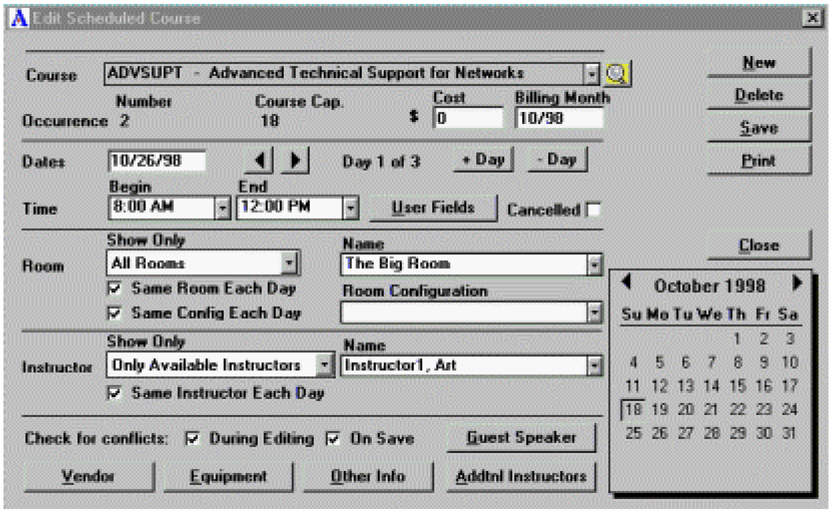
4. After choosing a course, the remainder of the screen unfolds and your cursor will be visible in the Dates field.

Enter the date for the <u>first</u> day of this Course (you may use the calendar at the bottom and click on a date. Use the right arrow to scroll to the correct month)

If the Course consists of more than 1 day, enter <u>all</u> of the information for Day 1, including times, room, configuration, and instructor, then use the right arrow button to advance to the next day. Enter new dates and information for **each** day of the Course.

If you want to lengthen or shorten the duration of the course for this <u>SPECIFIC</u> course occurrence, click on the +Day or -Day buttons.

The Cost will be shown as entered in the Course Editor. If you want to change it for this particular occurrence, you can do so here.



5. Select the BEGIN and END times for the Course from the drop-down lists.

6. Select the ROOM NAME and CONFIGURATION by using the drop-down lists.

7. Select the INSTRUCTOR by using the drop-down list.

Note: *If the same Instructor, Room and Configuration will be used for every day of the Course, click the* ***Same Each Day*** *check boxes. Also, if you want AdminSTAR to check for scheduling conflicts with the room and instructor, make sure that both boxes check for scheduling conflicts: During Editing, and On Save should be checked. When these boxes are checked, AdminSTAR automatically checks and warns you of any Instructor, Room, Time and Date conflicts when you tab away from a field or Save.*

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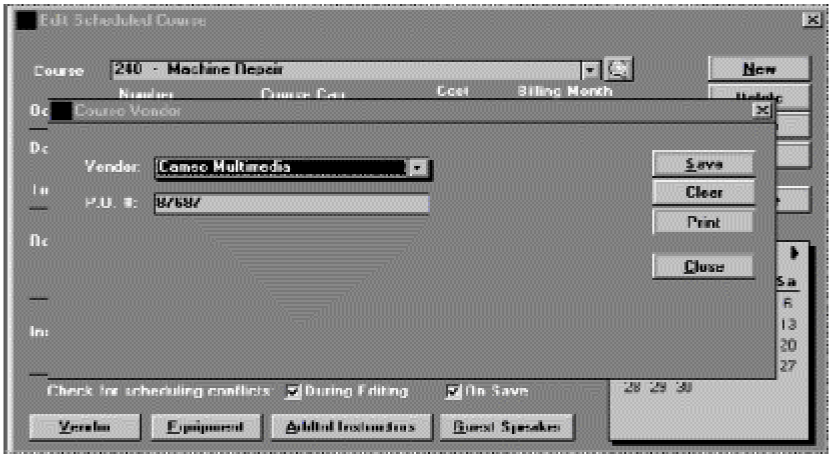
8. You may also reserve Equipment for the Course, and add Additional Instructors or Guest Speakers by clicking on the buttons at the bottom.

9. You may also assign specific vendors to the course instance along with the PO Number for various vendor training.



10. Click **Save** when finished., then click **Close** to exit.

11. The Course just scheduled will show up in the VIEW SCHEDULED COURSES screen.

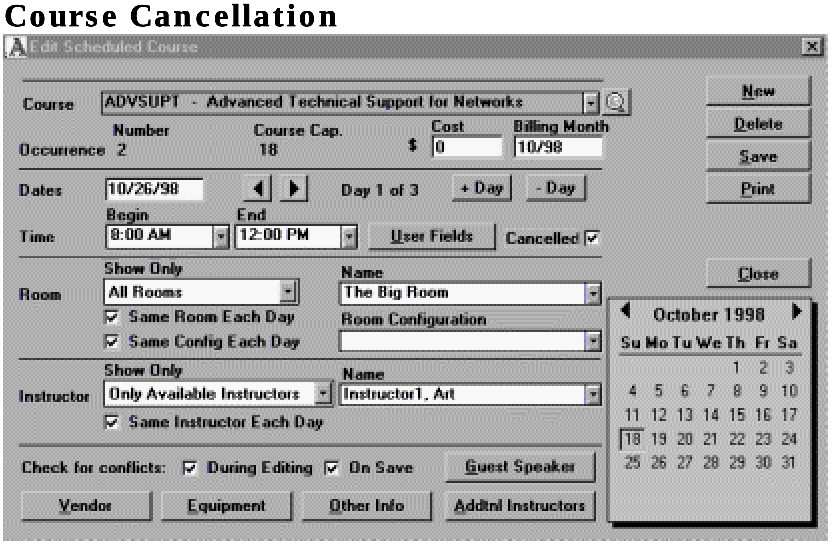
12. In this screen, you may now Enroll Learners.

***Note:** If you previously used the Planning function in AdminSTAR, you will <u>not</u> have to click on New to create a New course occurrence. All the course instances will be listed for you. In this case, all you need to do to further edit each course instance is double-click on a specific course and you will go to the Course Detail screen. Here you can add the specific dates, times, rooms and instructors and then save.*

User Fields Button

The other button is used to populate Dynamic User defined fields. They can be entered at anytime as ways to help store information that AdminSTAR might not already track for you. See also Dynamic User Defined Fields (Appendix A.)

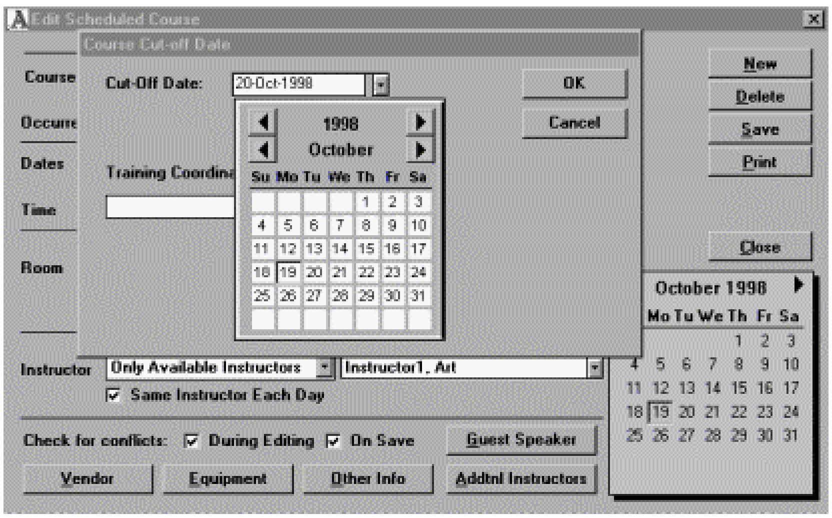
Course Cancellation



A course instance can be canceled by checking the **Cancelled** button. When this box is checked the course instance remains on the scheduling screen, but is greyed-out. Users can change the status of learners currently enrolled in the course, but are not allowed to enroll new learners or add learners to the wait list.

AdminSTAR will notify users if there are learners enrolled in a course at the time of cancellation. Users will be given the option to **1. Change Status** of the learners enrolled to "Cancel N/C". **2. Don't Change**, the learners will remain enrolled in the course but the course will show canceled. Or, users can **3. Abort** the cancellation process.

Cut-Off Date and Training Coordinator



A **Cut-Off Date** can be set for each course instance. This setting allows users to prohibit enrollment in particular courses after the specified date.

A **Cut-Off Date** can be set by clicking on the **Other** button. This action will open the **Other Course Information.** Select the **Cut-Off Date** pull down and enter in the date that you desire. When you return to the **View Scheduled Courses** screen, you will notice that courses with a **Cut-Off Date** that has been activated will appear in red when the **Cut-Off Date** has been passed.

A **Training Coordinator** can also be added from this screen. Go to the drop down window and select your training coordinator from the list. And then hit save. This will associate an individual to your course occurrence who may be responsible for the set-up, enrollments, preparation of the room, etc...

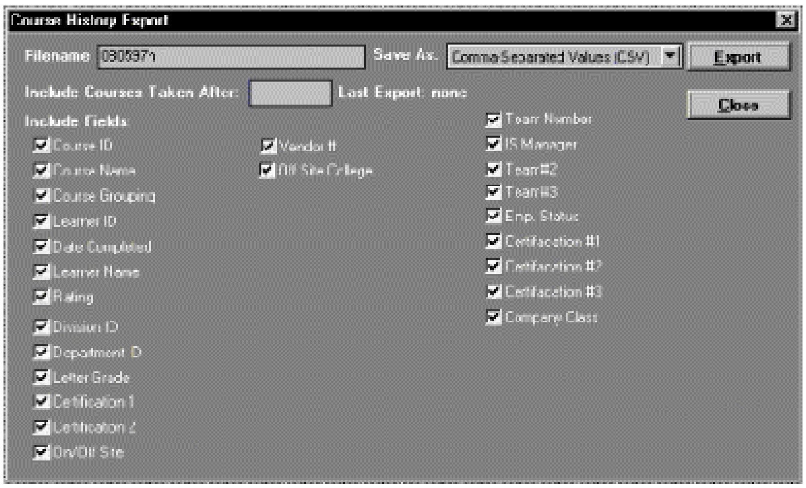
Exporting Course History

1. From the COURSE MANAGER screen click on the **Export** button.

2. Type in the file name that you want to name the course history file.

3. Choose the fields that you want to include in the file by selecting the radio buttons.

4. Select the format in which the course history file will be exported, then click on the **Export** button.



To View and/or Print a Report of Materials Needed:

1. While in the PRE-SCHEDULE REPORTS screen, click on the **Materials** button. Click **Yes.**

2. You may print the listing by clicking on the **Print** button. Click **Yes**.

3. When finished, click the **Close** button.

Course Reports

In the COURSE REPORTS screen you can choose up to 9 different reports. The course reports are listed below.

1. Billing Reports
   - a. Billing By Division
   - b. Total Income
   - c. Chrg Sheet - Department

2. Course Reports
   - a. Attendance Sheet
   - b. Calendar
   - c. Attendance Report
   - d. Course Enrollment

3. *Waitlist Reports*
   a. Wait List By Time Period

To Delete a Scheduled Course Occurrence:

1. Bring up the Course you want to delete in the VIEW SCHEDULED COURSES screen.

2. Select the Course and click on **Delete** and answer the questions that follow.

Note: *AdminSTAR* **will** *let you delete a Course in which Learners are already enrolled, although it is not recommended.) Once changes are saved, the information is entered into the database and the Course is deleted.*

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3. Select the Course and click on **Delete** and answer the questions that follow.

Note: *AdminSTAR* ***will*** *let you delete a Course in which Learners are already enrolled, although it is not recommended.) Once changes are saved, the information is entered into the database and the Course is deleted.*

The Action Menu

Using the Action Menu for the Classroom Manager

There are two ways you can access the Classroom Manager functions:

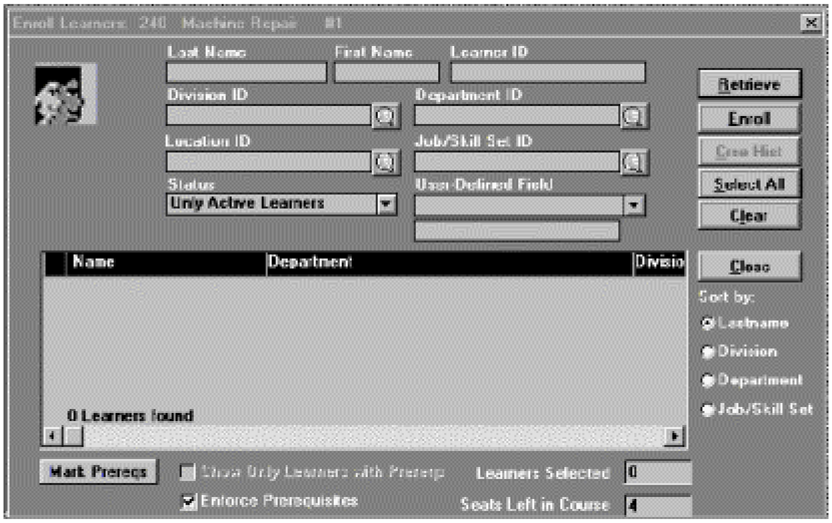
1. At the View Scheduled Courses screen, click the **Retrieve** button to bring up your listing of courses. After you have retrieved the courses, highlight the course that you want to work with by single clicking on it and then click on the **Action Menu** button. This will bring up a menu of all of the functions that are available for course scheduling. Simply click on the menu item that you want to use.

2. At the View Scheduled Courses screen, click the **Retrieve** button to bring up your listing of courses. After you have retrieved the courses, highlight the course that you want to work with by single clicking on it, then right click on the course, hold down the mouse button and drag to the **Action Menu** item that you want to use.

To Enroll Learners in Courses:

1. At the VIEW SCHEDULED COURSES screen, select the Course in which you want to enroll Learners. Click on the right mouse button, drag and select the **Enroll/Drop** menu item.

2. Click the **Add** button, at the **Enroll Learners:Course Name** screen, enter search criteria and click on **Retrieve**.



3. Remember, you can enter different search criteria (use the % as a wild card) and then click Retrieve to bring up a more specifically defined list of learners.

4. Notice the PREREQUISITES section of the screen in the lower left corner.

   a. When you click on the **Mark Prereqs** button, AdminSTAR will place an X next to all Learners who have the required Prerequisites.

   b. When you click on the **Show Only Learners with Prereqs** box, AdminSTAR will show you ONLY those learners who have completed prerequisites.

The **Enforce Prerequisites** box is checked when you enter this screen. If you leave it checked, then AdminSTAR will warn you if a Learner does not have the required prerequisites. If you click on **Enforce Prerequisites** box and UNCHECK it, AdminSTAR will allow enrollment of Learners even if they DO NOT have the required prerequisites.

5. Select a Learner (or as many as desired) by clicking on the Name(s). When finished, click on the **Enroll** button. AdminSTAR will indicate how many Learners were added to the list.

Note: You can look at the Learner Selected box at the bottom of this screen, to see how many Learners are enrolled. When the Learner Selected is *greater than the Seats Left in the Course, and you then click Enroll, one of two things will occur:*

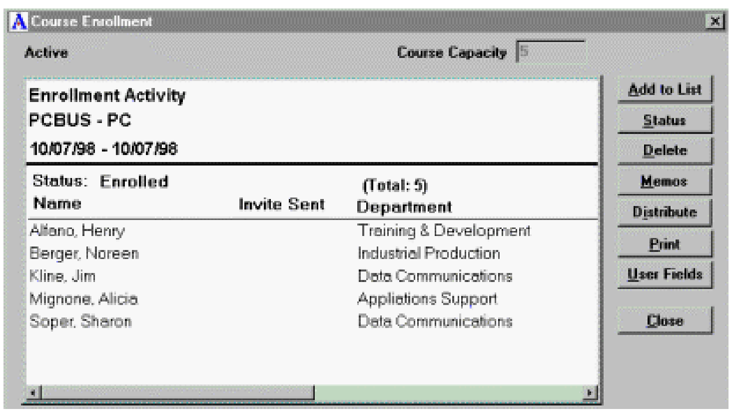
a) If you can overbook courses, AdminSTAR will ask you if you want to overbook the course by the number and you can click OK to do so, or

b) If you can not overbook courses, AdminSTAR will warn you that the class is overbooked by the certain number and not allow you to proceed with enrollment.

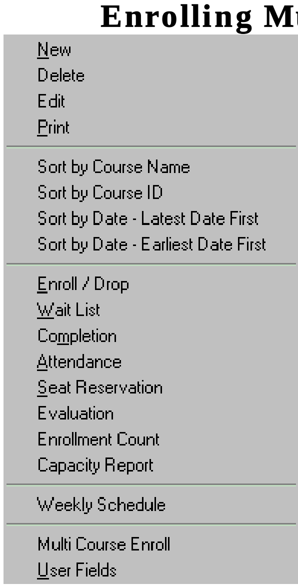
User Fields Button

The other button is used to populate Dynamic User defined fields. They can be entered at anytime as ways to help store information that AdminSTAR might not already track for you. Learner Enrollment User defined fields will be specific to the Learner and their enrollment into this particular enrollment. See also Dynamic User Defined Fields (Appendix A.)

The following screen illustrates enrollment activity. On this screen it shows 2 learners ENROLLED for course occurrence #1



Enrolling Multiple Learners into Multiple Courses



1. At the VIEW SCHEDULED COURSES screen, select the Course(s) in which you want to enroll Learners. **Select multiple courses** by, selecting one course, then holding the Ctrl- key while selecting extra courses. Click on the right mouse button, drag and select the **Multi Course Enroll** menu item.

2. By selecting the **Multi Course Enroll** menu item, an enrollment window will appear. This window will look very similar to the **Enroll Learner: Course Name** screen.

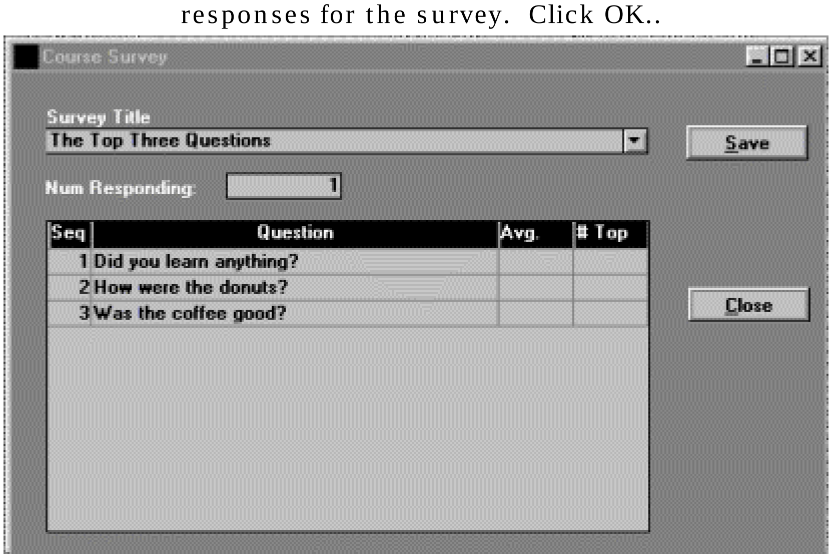
3. Select the learners you wish to enroll and click the **Enroll** button.

4. AdminSTAR will tell you if there are instances of conflict. Ex: a user tries to schedule Tom and Jane for two course instances. During one of the instances Jane is already scheduled for another class. AdminSTAR will notify the user that 3 enrollments were successful and 1 enrollment was unsuccessful. At this time the user can display which enrollments were unsuccessful, and why.

To Enter Statistics for a Course Occurrence Survey:

1. At the VIEW SCHEDULED COURSES screen, select the Course in which you want to assign a Course Survey. Click on the right mouse button, then drag to the **Evaluation** menu item.

2. Click on the drop down list and choose a Survey Title for the course. You will be asked if you want to enter survey responses for the survey. Click OK..



3. Type in the number of learners responding to the survey and then the **Average Score** and the **Percentage** responding in the TOP percentile for each question.

4. When finished entered the statistics, click **Save** and then **Close**.

Sending confirmations and e-mail to enrolled or wait listed Learners

You can perform two different types of notifications in the Classroom Manager – Memos function:

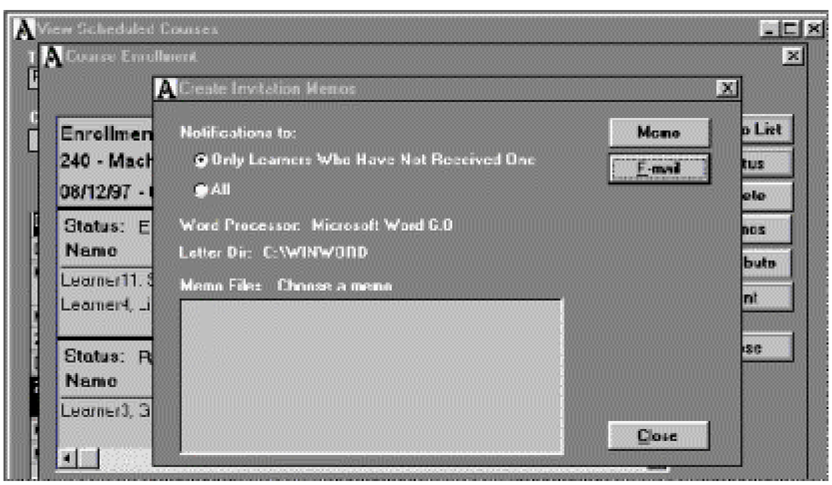
1. Create a Word Processing Memo

2. Create an E-mail Memo

To create a Word Processing Memo:

1. Click on the **Memos** button at the Course Enrollment screen.

2. Highlight a memo in the Memo Files box, click on one of the notifications radio buttons, either Only Learners, etc or All and then click on the **Memo** button. This would generate a mail merged Word document.



IMPORTANT NOTE: The MEMO button is ONLY USED if you are going to create a Word Processing Document - - IT IS NOT used if you are sending an email message

To create an E-mail Memo:

1. Click on one of the ***Notifications To:*** radio buttons, either **Only Learners**, etc or **All**

2. Click on the **E-mail** button**.**

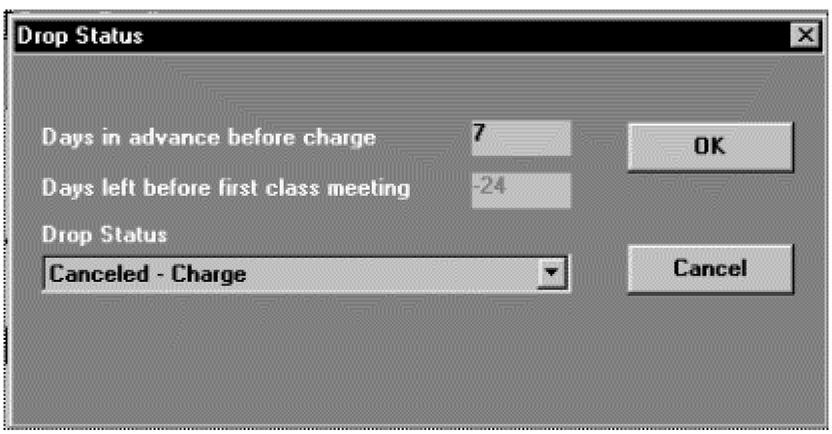
An e-mail message will be sent to ONLY those who have not received one yet, or an e-mail will be sent to ALL the learners who are enrolled in that class.

See also:
Part 1 Setup E-mail
Part 2 Merge Data into messages

Changing Course Enrollment Status for a Learner:

During the enrollment process for a particular course instance, you will undoubtedly have to change the enrollment status of one or more learner. Your can change their enrollment STATUS with the Status button on the Course Enrollment screen.

1. First highlight the Learner whose status you wish to change, then click on **Status**.



2. The Drop Status window appears providing you with information on the days in advance before charging for a drop and the number of days before the class is scheduled to meet. The drop down indicates a number of choices regarding the drop status, but defaults to the appropriate status based on the dates indicated in the fields above.

3. Use the drop down to select on the following 7 choices:

Canceled - N/C	Canceled, do not charge the Learner
Canceled – Charge	Canceled, charge the Learner
Reschedule - N/C	Reschedule the learner, do not charge

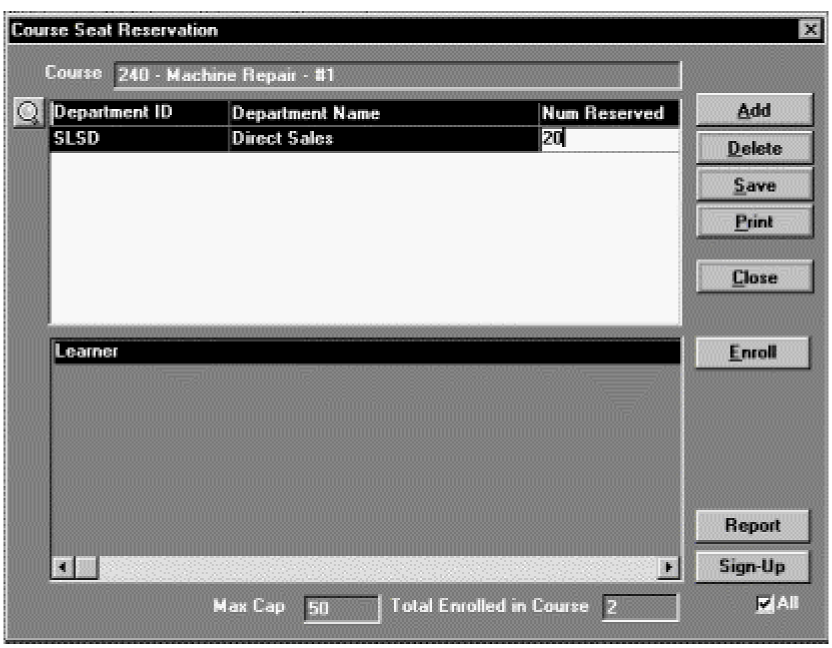
Reschedule – Charge	Reschedule the learner, charge
No Show - N/C	Learner did not show, do not charge
No Show – Charge	Learner did not show, charge
Enrolled	Re-enroll the learner in course

Note: *If a seat becomes available after a Learner is dropped, AdminSTAR prompts to see if you want to go to the Wait List. You can click Yes to see the Wait List and enroll Learners from there. Simply select the Learner you want to enroll and click on the Enroll button to assign the available seat to a waiting Learner.*

Reserving Seats for Learners:

AdminSTAR allows an administrator to reserve seats for the various Departments in an organization (2nd Hierarchy). After these seats are reserved, you can enroll learners from those Departments into the reserved seats. To reserve Seats:

1. At the VIEW SCHEDULED COURSES screen, first **highlight** the course for which you want to reserve seats, then click on the **Action Menu** button. Then select the **Seat Reservation** menu item. You will go to the Course Seat Reservation screen.



2. Click on the **Add** button, and type in the name of the Department. If you don't know the name, or want to search, press the Search button (magnifying glass) and AdminSTAR will provide you a Look Up screen.

3. After adding a Department ID and Name, enter the number of seats you want to reserve.

4. The **Report** and **Sign-Up** sheet print outs provide you with

   a. a **report** detailing the Department Names and number of seats reserved for each course, (If you click ALL) and
   b. a **Sign-Up sheet** for the various departments to sign-up learners for the seats they have reserved.

5. Upon receiving the filled out sign-up sheets, you can then **Enroll** the learners from this screen.

Wait Listing

From the VIEW SCHEDULED COURSES screen, you can see a listing of all courses for a Training Area and Time Period. On this same screen, you can see the Maximum Capacity of the Course and the current Enrollment number.

It is easy to see if a course instance is filled or overbooked at this screen. If you can not overbook a course instance or do not want to, you can place Learners on the WAIT LIST.

The Wait List is a prioritized list of Learners, listed in order of the date they were placed on the list. If there is a waitlist for a particular course, and if a Learner who is enrolled in that Course is dropped, AdminSTAR will alert you that there are other learner(s) waiting to be enrolled in this Course. You can then choose to go to the Wait List and Enroll a Learner from this waitlist to the course enrollment list.

To Put Learners on the Wait List for a Course:

1. At the VIEW SCHEDULED COURSES screen, select the Course in which you want to wait list Learners. Click on the right mouse button, then drag to the **Wait List** menu item.

2. Click on the **Add** button, and at the **WaitList Learners:Course Name** screen, enter search criteria and click on **Retrieve**.

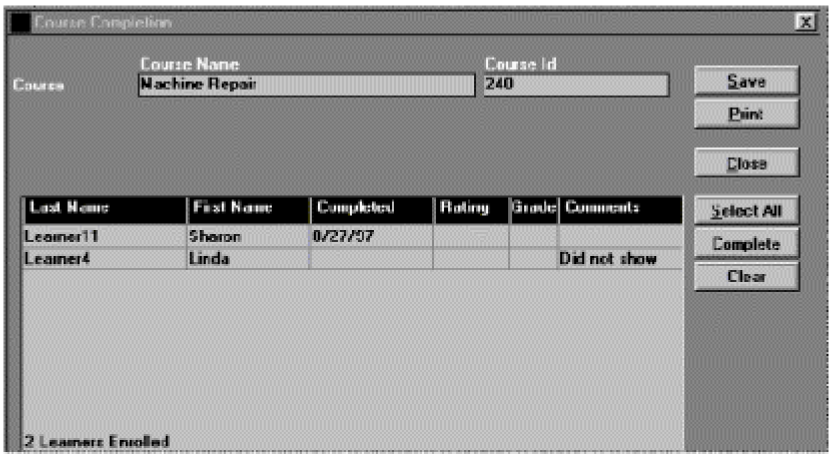
3. Select a Learner (or as many as desired) by clicking on the Name(s). When finished, click on the **Wait**

button. AdminSTAR will indicate how many Learners were added to the waitlist.

To Mark Completion for a Course:

1. At the VIEW SCHEDULED COURSES screen, select the Course in which you want to mark completion. Click on the right mouse button, then drag to the **Completion** menu item.

2. The window will display the course enrollment list.



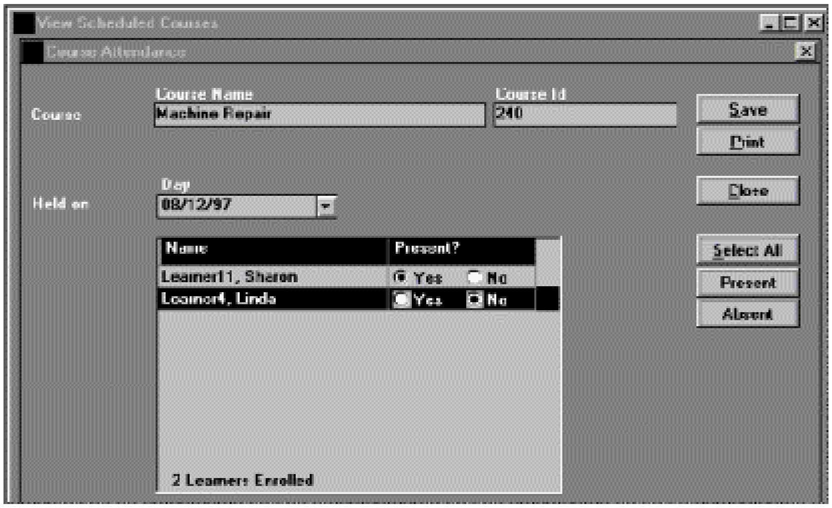
1. Click on the row for each learner, and click Complete. Enter a date, a Rating and any Comments.

2. Another approach is to click Select All and then click Complete. Click on a date for completion from the Calendar. After all the Learners are marked Complete, you can go through the list and mark the exceptions.

To Mark Attendance for a Course:

1. At the VIEW SCHEDULED COURSES screen, select the Course in which you want to mark attendance. Click on the right mouse button, then drag to the **Attendance** menu item.

2. Click on the drop down list and choose DAY of the course for which you want to mark attendance. After choosing the day, the window will fill in with the course enrollment list.



1. For each day chosen, click on the row for each learner, and click Present or Absent.

Another approach is to click **Select All** and then click **Present** or **Absent**. After all the Learners are marked Present or Absent, you can go through the list and mark the exceptions.

To Verify the Enrollment Capacity for a Course:

1. At the VIEW SCHEDULED COURSES screen, select the Course in which you want to determine the Course Capactiy. Click on the right mouse button, then drag to the **Capacity Report** menu item.

2. The Capacity Report then appears for the course instance selected.

Course User Defined Fields

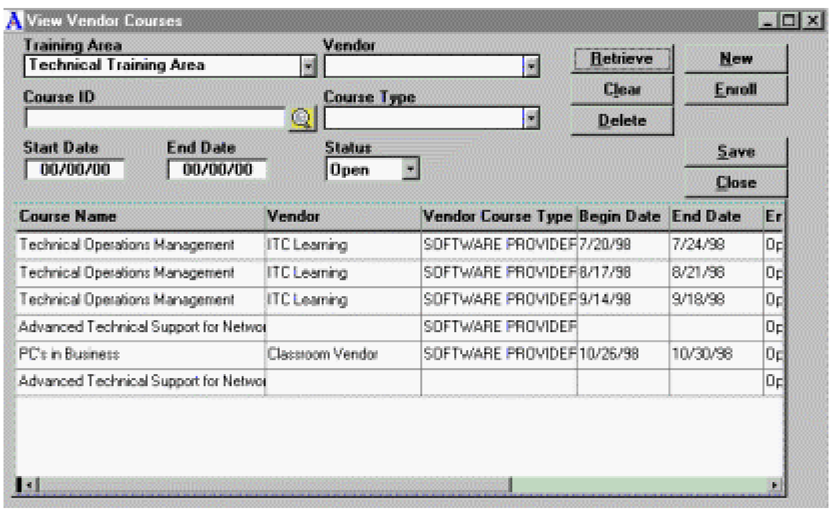
By selecting the User Defined fields option from the Action Menu. Users are allowed to enter in values for the User Defined fields as they relate to this particular occurrence of this course. If your Administrators have set up default values for the User Defined Fields, they will show up here initially, and can be altered from this screen as needed. See also Dynamic User Defined Fields (Appendix A.).

Vendor Courses

Vendor Courses are courses offered outside of the normal instances within the corporate training environment. They range from training that occurs off site, to classes that outside vendors teach within the company. Because of the extra charges and extra approvals needed within the corporate world for these courses, they are set up as separate instances.

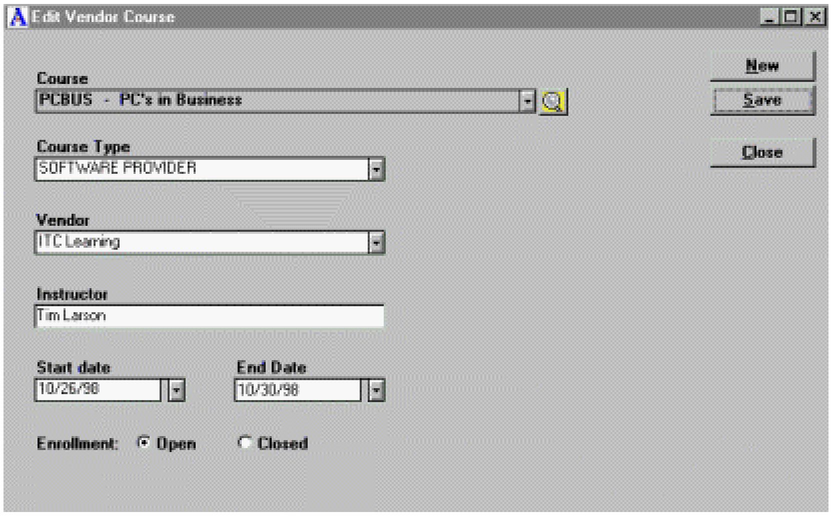
How to Setup a Vendor Course

1. In the Classroom Manager, Select Vendor Courses.



1. On the Vendor Courses screen you can pull up the currently scheduled courses by clicking the retrieve button.

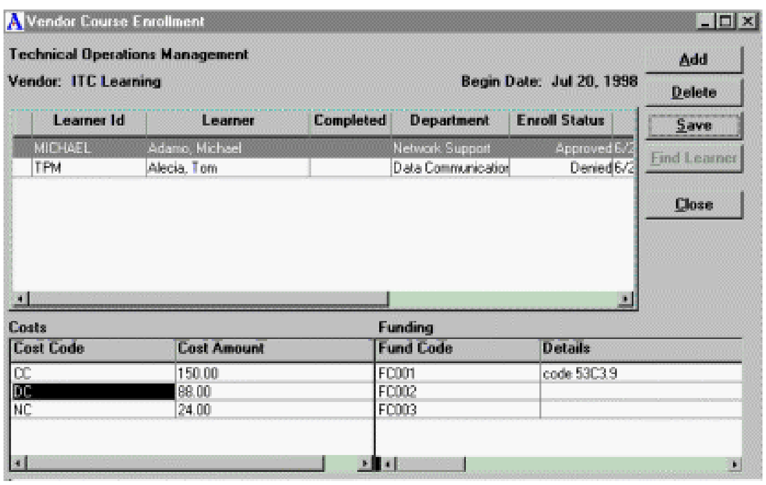
2. Create a new instance by selecting the **New** button. The Course creation screen will appear where you can select the course. You can select Course type, Vendor, Instructor, start and end date.



3. *After you have filled in your data, simply hit save*

To Enroll a User in a Vendor Course and Complete the Course

1. The **Enroll** Button brings up the **Vendor Course Enrollment** screen.



2. Select a course first and then click Enroll.

3. To Add a learner click add, this adds a blank row into the table. You can either enter a learner ID there, or click **Find Learner**, which allows you to select a learner from the list.

4. Find learner screen acts just like the Find Learner for regular course enrollment. You can also select multiple learners to enroll in the course. When you have selected the learner(s) just hit close and they are carried over to the list.

5. Hit Save.

6. Enter in the date the course was completed for each learner and hit save. The course history then carries into the Learner History.

To update Cost and Fund codes, based on a specific Learner

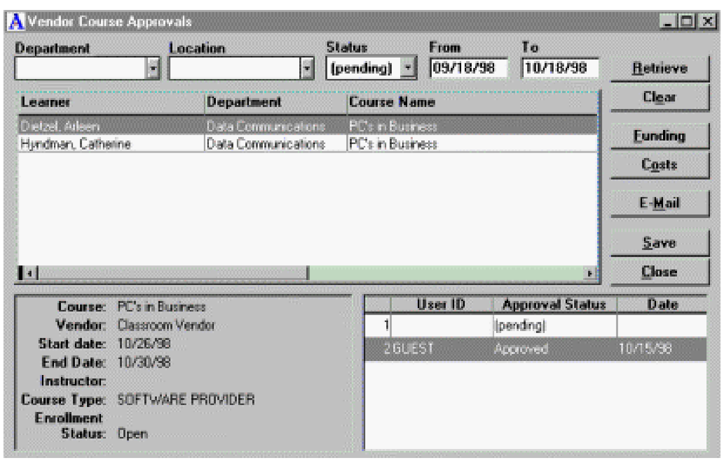
1. Highlight the learner and adjust the codes in the Fund and Cost code windows below.

2. Again Save.

How to Approve a Learners' attendance in a Vendor Course

The **Approval Screen** is found by opening the Classroom Manager screen and clicking the **Approval** button. **The Approval Screen** is for granting and denying attendance in a vendor course. When entering the **Approval Screen** AdminSTAR will sort your view based on the Training Region of the user. If you are a user from the Saugatuck Training Center, then you will only see approvals for the Saugatuck Training Area.

1. Hit retrieve to bring up the users that are requesting to attend specific Vendor Course instances.



2. Select the row of the Learner that you are about to approve or reject.

3. You should notice that when you select the learner the **course instance information** appears in the bottom left hand portion of the screen. And, if you click on the **Cost and Funding buttons** you can see this information as it pertains to that particular Learner.

4. In the bottom right-hand side of the screen is the **approval window**. Select the in the approval window or the row that matches your approval level and select it.

5. A drop down window should appear, allowing you to accept or deny this request. A learner must have approval from all levels, before they are accepted for the course.

Learning Center Manager

The Learning Center Manager provides a comprehensive management system allowing the administrator to:

1. **Enroll** learners into multimedia courses,

2. **Schedule** learners into multimedia learning stations,

3. **View print** and change station schedules.

4. **Mark attendance ,** test scores and completion.

To begin, select **Learning Center Manager** from the Manager item on the Menu Bar.

Functions Available for Learning Station Scheduling

1. **Changing Start Time - Click**

   When scheduling time blocks, even after you have clicked on a particular block, you can click on a different block and change your mind before saving.

2. **Lengthen and Shorten Times - Shift Click**

   You can lengthen or shorten the suggested duration (i.e., the number of **C's** in the blocks) by holding down the SHIFT key and clicking in a block greater than the suggested end time (to lengthen) or clicking on a block less than suggested end time (to shorten).

3. **Unqualified Station - NO Red Arrow**

   If you click on a row (Learning Station) that is **NOT** qualified, i.e., no red arrow is showing in the Q column, AdminSTAR will warn you and ask you if you want to proceed. If you answer Yes, the learner will be scheduled in an unqualified learning station.

4. **Already Booked Time Blocks - B’s**

   When enrolling learners into multimedia stations, there will be times when you will see B’s in the time blocks. These **B's** stand for "Booked" and mean that other learner(s) is/are scheduled for those times on this day. In order to schedule the current learner, click on a grid block that does not intercept the B's already shown on the Scheduling Grid.

5. **Double Booking - D's**

If you do click your block of C's on a time block of B's, AdminSTAR will warn you that you will have a double booking. If you proceed with the double booking, AdminSTAR will indicate the double booking by the letter **D** in the block(s) where the C (current booking) intercepted the B (past booking)

6. **NO Materials Available - GRAY Blocks**

If you see columns that are DARK GRAY in the Scheduling Grid, these time blocks so indicated mean there are NO multimedia materials available to schedule.

Viewing - Printing - Changing Schedules

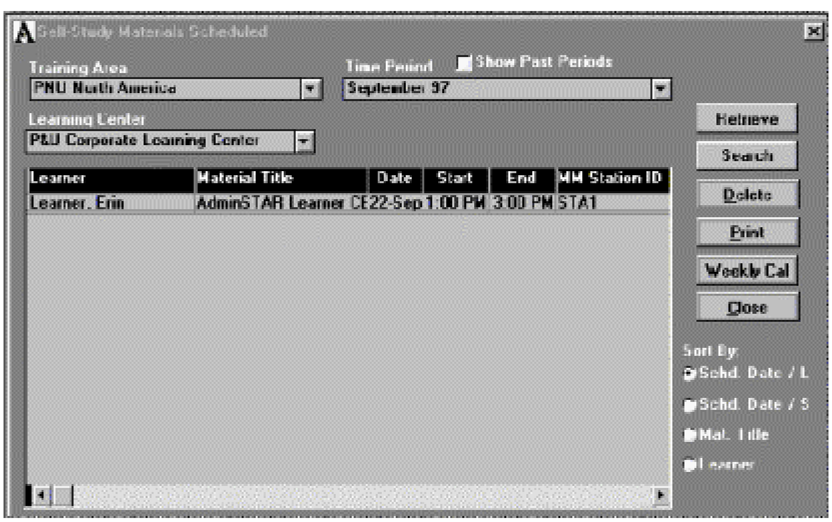
Not only can you enroll learners into multimedia self study courses and schedule them into self study sessions, you can also view and print their schedules and change them if necessary.

To View and Print Schedules:

1. Click on the **Edit Schedules** button on the LEARNING CENTER MANAGER screen.

2. **The Self Study Materials Scheduled Screen**

It is from this screen that you can view and print multimedia material SCHEDULE information. Here you choose the **Training Area** and the **Time Period** and **Retrieve** all material Schedules for that Training Area and Time Period.



3. **Sort By** (lower right)

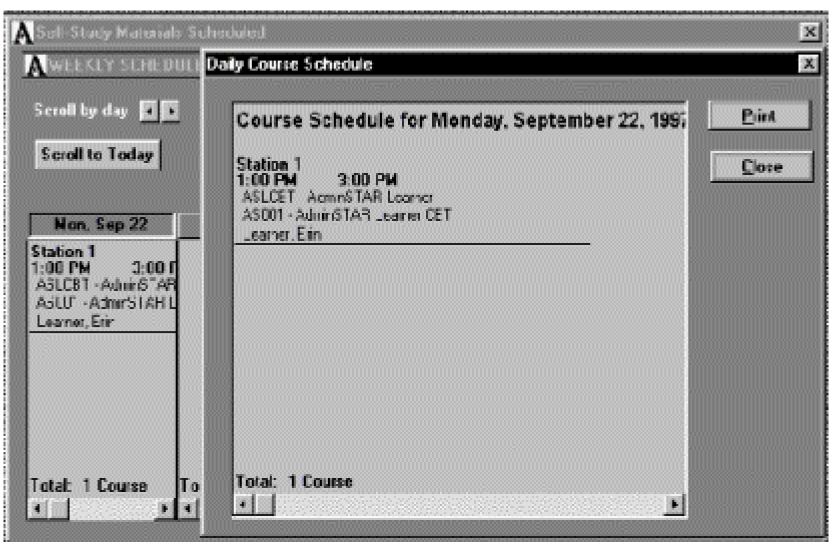
Allows you to sort by Scheduled Date and Learner (L) or Scheduled Date and Station (S) within the specified Time Period, as well as sorting by Material Title, and Learner's Name.

4. **Searching**

If you need to search for a particular Learner in the list (ex: long list - many instances of learner enrolled in time period), then click on the **Search** button. You will need to type in the Learner's Last name EXACTLY (no wildcard searches) and then keep pressing the **Find Next** button until you find the learner schedule you are looking for.

5. **The Print button** will print the Schedules shown on the screen in a grid format.

6. Another option for both VIEWING and PRINTING is to click on the **Weekly Cal** button. This will take you to a weekly calendar of scheduled learning center events. You can scroll through these listings by day, week, or month. Click the **Print** button to print the Weekly calendar of scheduled learning center events.



7. At the Weekly Calendar, you can click on the **Date Header** and see the Daily Schedule of learning center events. Click the **Print** button to print the Daily calendar events.

To Change Schedules:

1. Click on the **Edit Schedules** button in the LEARNING CENTER MANAGER screen.

2. Select the appropriate Training Area and the Learning Center. Also, select the appropriate Time Period to search within. Click on the **Retrieve** button.

3. To more easily FIND the specific learner schedule that you want to change, you can use the **Search** button or the **Sort by** functions.

4. Once the specific learner schedule is found, **Double click** on that schedule. The same procedures are used to change schedules as in creating them. See section titled, Scheduling a Learner into a Multimedia Station.

5. When finished making changes, Click **Save**, then **OK**, then click **Close.**

Blocking a Learning Center Station

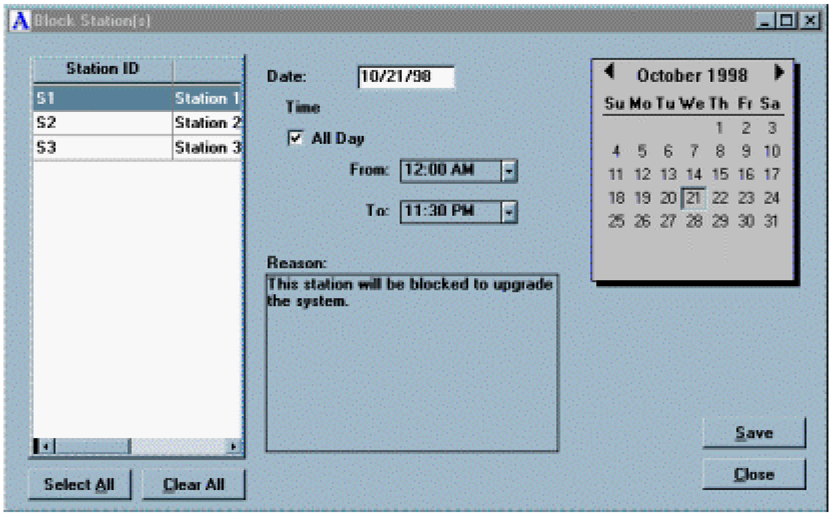
In the event that a Learning Station has to be closed or is made unavailable for use. Using the Block Stations function, that Learning Station can be eliminated from use over specific periods of time.

To Block a Learning Center Station:

1. Click on the **Block Stations** button in the Learning Center Manager screen.

2. Select the appropriate Training Area and Learning Center for the Station that you wish to mark as Blocked.

3. Click on the **Add** button.



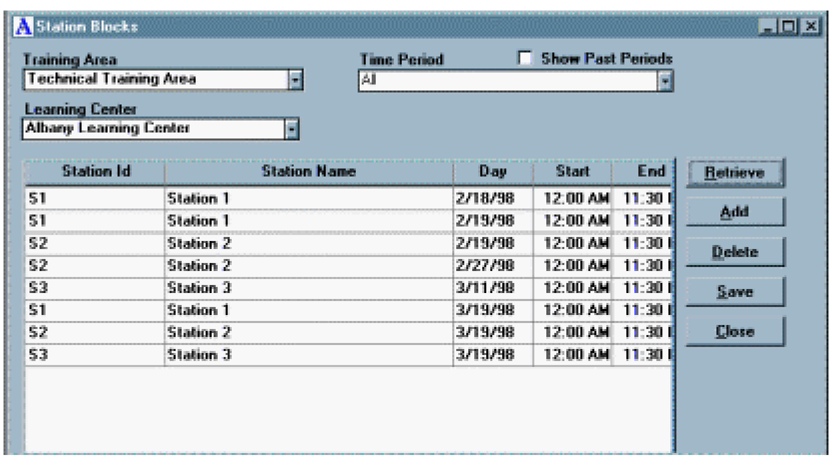
4. From the list on the left select the station you wish to block off.

5. When you have made your selection then choose the day that you wish to block the station.

6. Using the buttons in the middle of the screen, you can block the station for the entire day, or a set of selected hours.
7. The save button will register the new information and that Station will no longer be available for using during the time period indicated.

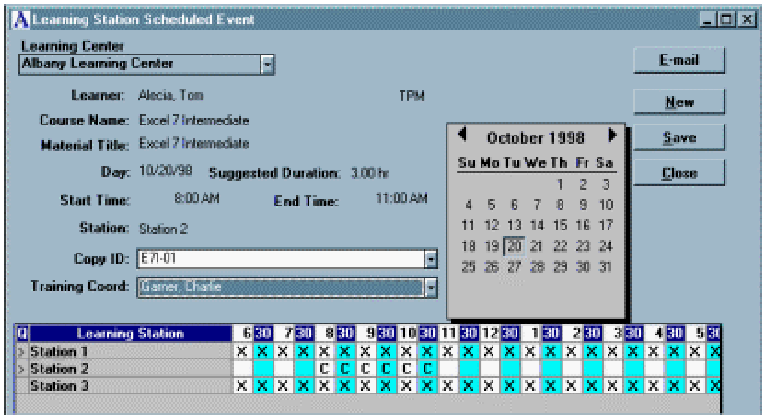
To remove a **Station block**,

1. Proceed to the Station block screen.



2. Select the particular instance(s) that you wish to delete, and click the delete button.

Once a station has been blocked from use, it will appear on the Learning Station Scheduled Event screen as X's.



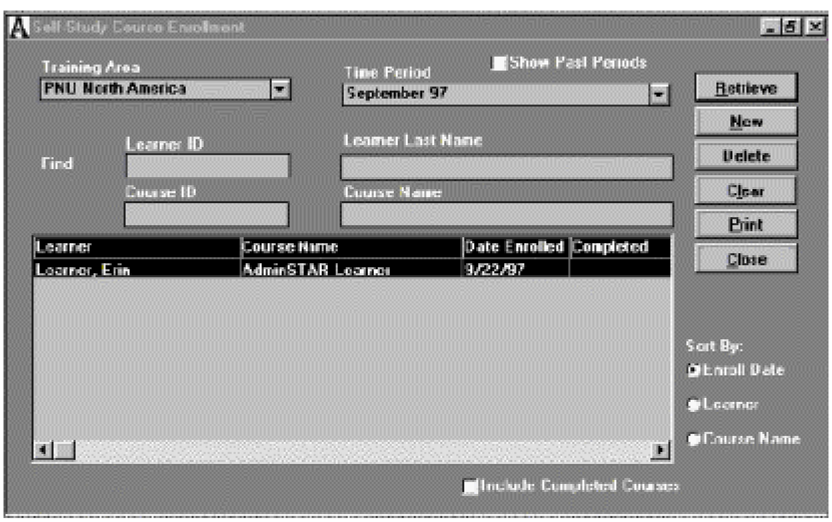
Enrolling a Learner into a Multimedia Course

Note: *A Multimedia Course is made up of one (1) or more multimedia materials. Before you can schedule a learner to take a multimedia material, you first need to enroll the learner into a multimedia course that contains a material(s).*

To View and Print Enrollments:

1. Click on the **Enroll/Schedule** button in the LEARNING CENTER MANAGER screen.

You will come to the *Self-Study Course Enrollment* screen. It is from this screen that you can VIEW and PRINT multimedia course enrollment information.



2. Choose the correct **Training Area** and the **Time Period**.

3. Next, **Retrieve** course enrollments in progress for the Training Area and Time Period.

4. To see <u>ALL</u> course enrollments, i.e., completed enrollments as well as those in progress, click on the **check box** at the bottom of the screen titled, Include Completed Courses and then click **Retrieve**.

5. To see course enrollments for a particular <u>Learner</u>, enter his/her ID or name (using wildcards) and then click **Retrieve**.

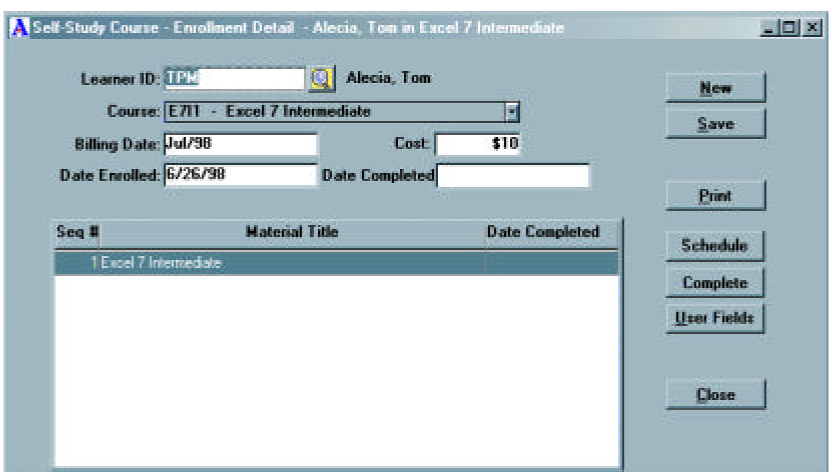
6. To see course enrollments for a particular <u>Course</u>, enter its ID or name (using wildcards) and then click **Retrieve**.

7. After retrieval of enrollments, you can sort the listing using the **Sort By** function located in the lower right corner of the screen. You can sort by Enrollment Date, Learner's Name orCourse Name.

8. Also, after retrieval and/or sorting, you can print the current listing of enrollments showing in the screen by pressing the **Print** button.

To Create a New Enrollment:

1. Click on the **New** button to create a new multimedia enrollment.



2. You will come to the *Self-Study Course Enrollment Detail* screen. It is from this screen that you can <u>create</u> and <u>edit</u> multimedia course enrollment information.

3. Enter the Learner ID for the Learner you want to enroll and press TAB.

4. If you don't know the learner's id, and need to find it, click on the **Find Learner** button located in the lower left corner of the screen. At the Find Learners screen, you can enter specific search criteria and click on **Retrieve**. After you have Retrieved the Learner, click on his/her name and then click on the **Use** button. Alternatively, you can just double click on the Learner's name and it will be entered in the Self-Study Enrollment Detail screen.

5. If the Learner does not already exist in the database the

6. Click on the drop down list for Course and select a Multimedia Self-Study course to enroll the learner into. The Cost of the Course will appear in the Cost field.

7. Click **Save.**

8. The Billing Month and Date Enrolled will appear as well as a LISTING of all the multimedia Materials that the learner must complete to complete the multimedia Course.

Note: *The listing of materials includes their sequence number. This is the suggested sequence for scheduling.*

You have now completed the first step in Scheduling and Tracking in the Learning Center Manager, i.e., ***Enrolling a Learner in a Multimedia Course***.

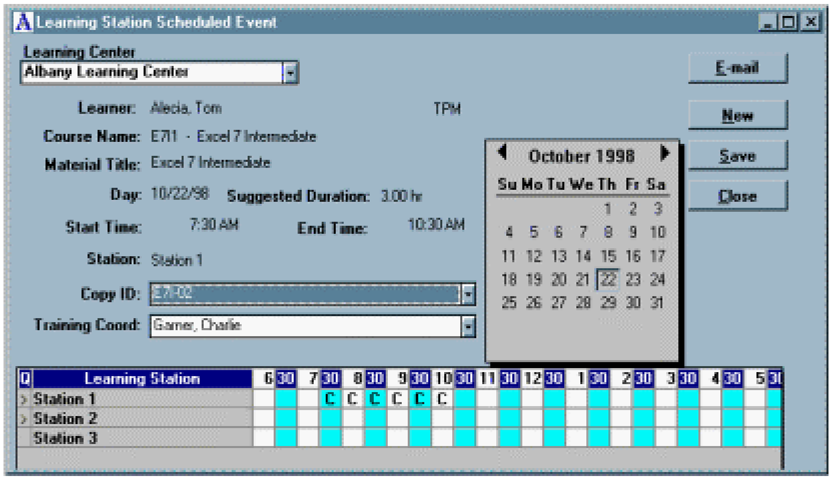
Scheduling a Learner into a Multimedia Station

The next step after enrolling a learner into a multimedia course, is to schedule that learner to take one (1) of the multimedia materials related to that course.

Make sure you are at **The Self Study Course - Enrollment Detail Screen**

1. Click once (highlight) the material title that you want to schedule (ex: Seq # 1) and then click on the **Schedule** button.

You will come to the *Learning Station Scheduled Event screen*. It is from this screen that you can schedule learners at learning stations.



2. Make sure that the CORRECT Learning Center is showing in the drop down list, then Click on the **DAY** in the calendar that you want to schedule the multimedia material. (You may also type in the date if you desire)

3. Once the date has been entered (if you typed in the date, tab to the start time field), the Learning Station *Scheduling Grid* will appear at the bottom of the screen.

The *Scheduling GRID* has been designed as follows:

Times: Times are divided into 1/2 hour increments and begin on the hour and 1/2 hour. The range of times for scheduling are from 6:00 AM until 12:00 PM (Midnight).

Learning Stations: All of the multimedia learning stations that have been defined for that Learning Center will appear under the Learning Station heading. Those that are QUALIFIED, i.e., those that contain multimedia training delivery equipment that **matches** the media of your learning material will have a RED ARROW under the **Q** (Qualified) column.

4. Click on a BEGIN time block to enter the start time for the self study. A row of Capital **C's** (which stands for **Current** Booking) will appear in the row you clicked on.

Note: *The number of **C's** equals the number of 1/2 hour blocks that correspond to the suggested duration. That is, if the suggested duration is 2 hours, the number of C's will be 4 (i.e., 4 - 1/2 hour blocks = 2 hours).*

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5. Once you have selected the date and the start and end times for a specific learning station, the next step is to choose the Material Copy. Click on the drop down list for Copy ID and select an available material copy.

Note: *What materials appear in the drop down list will depend on what is available based on the learning station you selected and the times. Sometimes all the materials that are possible will be available, other times, a limited selection will be available and other times, no materials will be available.*

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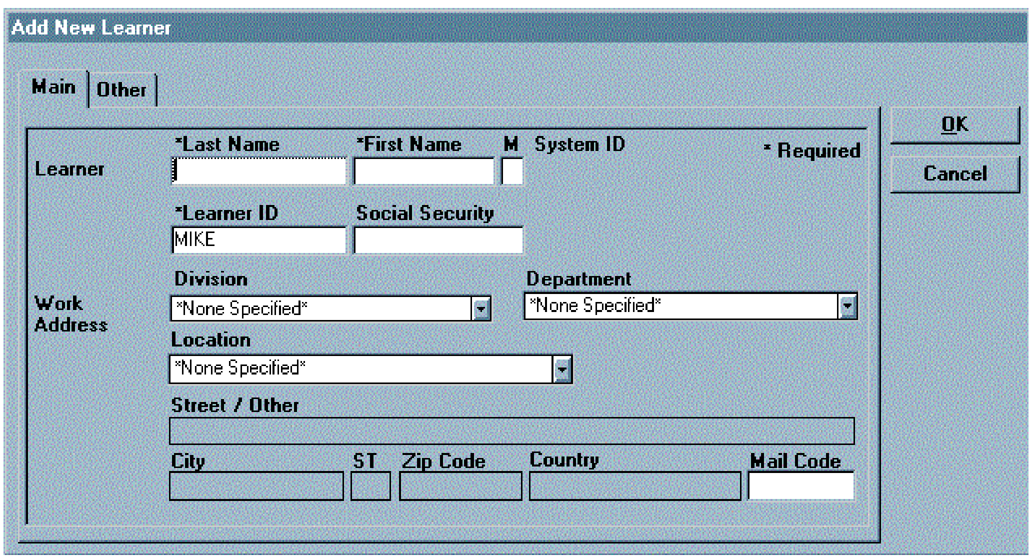
6. Click **Save**, click **OK** and then **Close** to leave the Learning Station Scheduled Event screen.

Self-Study Enrollments: User Defined Fields

By selecting the User Defined fields button users are allowed to enter in values for the User Defined fields as they relate to this particular Self-Study Enrollment of this course. If your Administrators have set up default values for the User Defined Fields, they will show up here initially, and can be altered from this screen as needed. See also Dynamic User Defined Fields (Appendix A.).

Self-Study Scheduling: Learner Quick add feature

AdminSTAR allows users to Add a new learner to the database from the Self Study Enrollment Screen. A user who is at the **Self-Study Course – Enrollment Detail** screen can enter in the Learner ID at the top of this screen. If that learners' ID does not appear in the database, then the **Add New Learner** screen appears.



This will allow a user to Enter a new learners' information, click on Save, and then continue on with the Enrollment process.

Sending a confirmation e-mail to a Learner

After you have scheduled a learner for a self-study course and saved the schedule, you can send a confirmation e-mail to a learner letting them know that they have been scheduled.

Below is an example of an e-mail message:

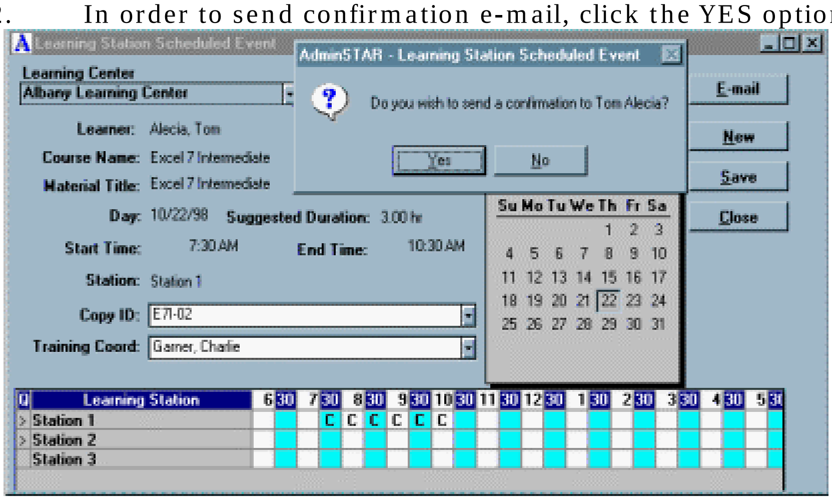
[[firstname]] [[lastname]]:

A learning station ([[station_name]]) has been reserved for you to take the [[course_name]] course. The [[title]] is scheduled for you on [[day]] from [[start_time]] until [[end_time]] at the [[learning_center]].

To Send an e-mail confirmation

1. After you have created and saved a learning station schedule, click on the E-mail button in the upper right hand corner of the screen. AdminSTAR will ask you if you want to send confirmation e-mail to the learner defined in the schedule.

2. In order to send confirmation e-mail, click the YES option.



Marking Completion of Materials

1. Marking Completion of Materials - *Current Date*

   To mark completion of a multimedia material using today's (current) date, click once (highlight) a learner's schedule and click on the **Complete** button. The completion date will appear in the Completed column for that material.

Note: *AdminSTAR will notify you if the learner has more materials to complete in order to complete the Course OR that the learner has NOW completed ALL materials for the Course.*

2. Marking Completion of Materials - *Edit Date*

To mark completion of a multimedia material using another date (not the current one), click once (highlight) a learner's schedule, hold the **CTRL** key down and click on the **Complete** button. An Edit Date window will appear which will allow you to edit/change the date for completion of the material. Change the date and click **Enter**. The edited completion date will appear in the Completed column for that material.

Marking Attendance

1. Click on the **Attend/Complete** button in the LEARNING CENTER MANAGER screen.

2. Select the appropriate Training Area and the Learning Center.

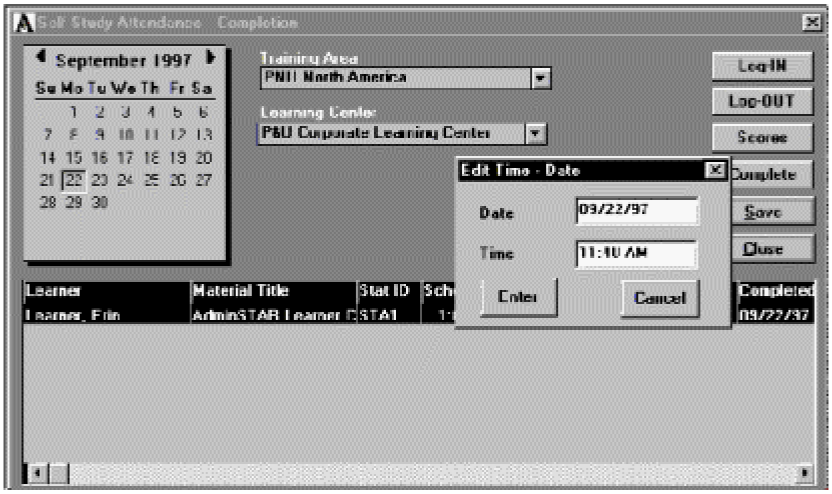
3. **Viewing Schedules**

The Learner's schedule, that is his/her material title and station id, along with his/her scheduled start and end time will be listed for the date shown on the calendar. (The default is Today's Date). You can view other schedules for different dates than today's date by **clicking** on another day on the calendar.

4. Logging IN and OUT - <u>Current</u> Date & Time

To log a Learner IN (Mark Act Beg for Actual Beginning Time), click once (highlight) a learner's schedule and click on the **Log IN** button.

5. To log a Learner OUT (Mark Act End for Actual Ending Time), click once (highlight) a learner's schedule and click on the **Log OUT** button.



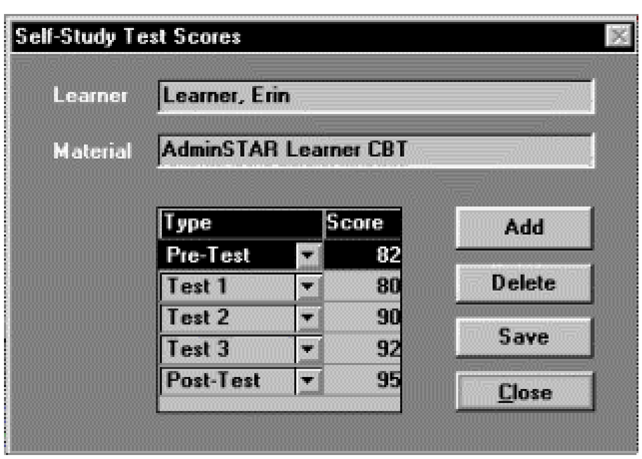
6. Logging IN and OUT - <u>Edit</u> Date & Time

To log a Learner IN with a date and time <u>different</u> than the current date and time, click once (highlight) a learner's schedule, hold down the **CTRL key** and click on the **Log IN** button. An Edit Time & Date window will appear where you can change the date and time. Click **Enter**. Follow the SAME procedure outlined above for logging a Learner OUT with a different date and time than the current date and time, except hold the **CTRL key** and click **Log OUT**.

Marking Test Scores

1. To post a score, Pre-Test, Post-Test, or otherwise, click once (highlight) a learner's schedule and click on the **Scores** button. A Scores window will appear showing the Learner, the Material Title and an area to list the TYPE of test and its score.

2. Click **Add** to display a drop down list from which you can choose up to 6 different test types, Pre-Test, Post-Test and Test 1 through Test 4.



3. **Click** on a test choice, then **type** a score number up to 100.

4. Click **Save**. Click **Close** when finished.

Course Completion

Once ALL materials for a multimedia course have been marked as completed for a Learner, AdminSTAR will automatically MARK the multimedia Course as completed.

This can be seen by clicking on the Enroll/Sched button and viewing the Self Study Enrollment Screen (make sure you click on the Include Completed Courses check box) or the Self Study Enrollment Detail screen.

You can also see this in the **Report** Section under Learning Center Manager.

CAUTION RE: *Going back and changing the Completion Date of a Material AFTER the Course has been automatically marked as Completed.*

If you mark a material as being completed which in turn automatically marks the course as completed and then go back and change the date of the completed material, AdminSTAR ***DOES NOT*** *automatically change the date of the corresponding course.*

You will have to go to the Self Study Enrollment Detail Screen and MANUALLY change the completion date of the Course to coincide with the new, revised completion date of that material.

Library Manager

The Library Manager will track, schedule and loan out Learning Materials. It will also track reservations and

The Show Checked Out and Show Reservation Screens:

These 2 screens are helpful in the Equipment Manager. You can use either for a quick reference that shows which items are currently checked out, and which items are currently reserved. Included in the information are Learner names, Dates Out, Dates Due, Type of Equipment, Number Reserved and Start and End Dates.

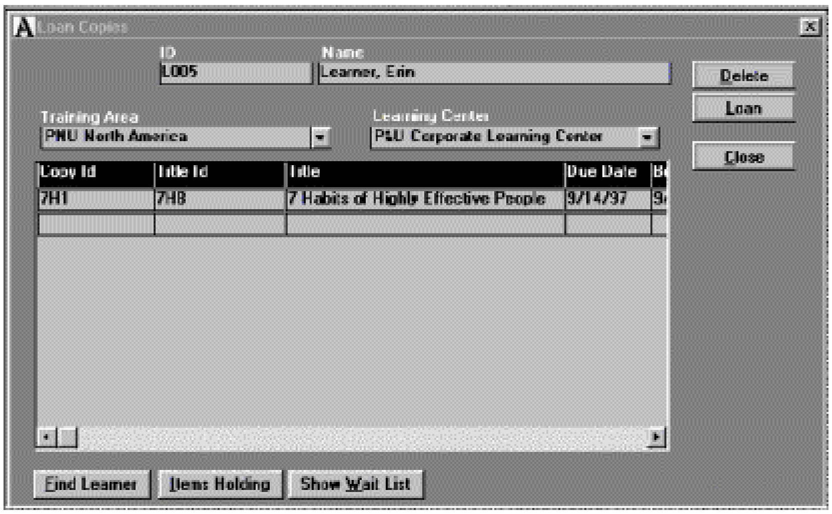
All of these items can be sorted in a desired order by clicking on the radio buttons at the bottom. To access either of these screens, while in the Equipment Manager screen, click on the Show Out button to show items currently checked out or the Show Res. button to show current reservations.

To Loan a Material Item:

1. Click **Loan** in the Library Manager screen.

2. Choose the Learning Center from which the Material is being loaned.

3. Click on the **Loan** button. Enter the ID of the Learner who is borrowing the Material. (Use the FIND LEARNER button at the bottom if you do not know the Learner's ID.)



4. After entering the Learner ID, press the **Tab key** on your keyboard.

5. Enter the Copy ID of the Material to be loaned, and press the Tab key again.

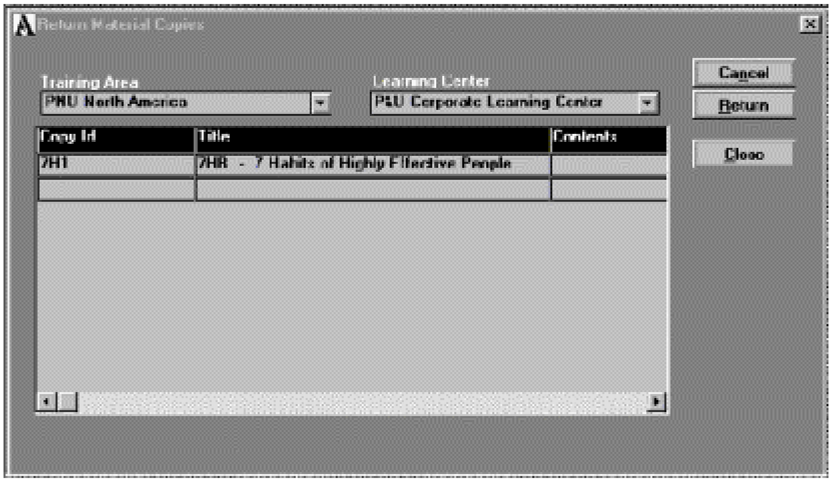
6. Now click on the **Loan** button to process this loan.

To Return a Material Item:

1. In the LIBRARY MANAGER screen, click **Return**.

2. Choose the Learning Center at which the Material is being returned.

3. Click on the **Return** button.



4. Enter the Copy ID of the Material that you are returning. Press the **Tab key.**

5. Now click the **Return** key. Click **OK**. The Material is returned successfully.

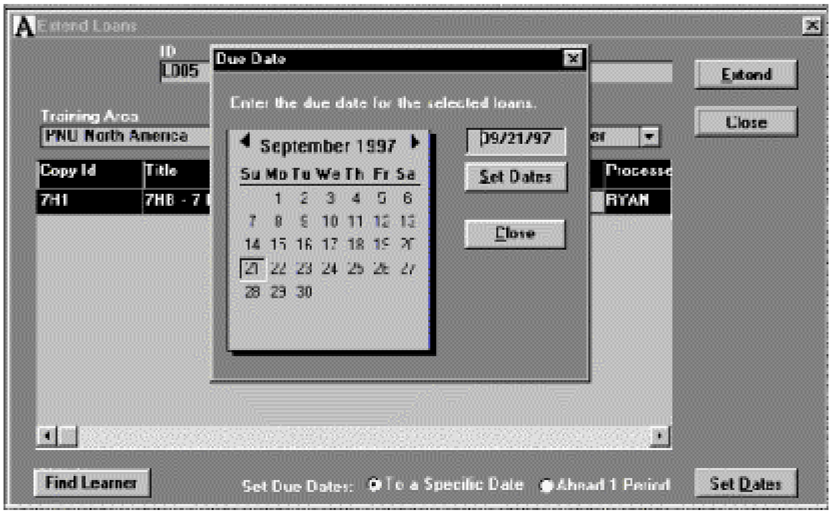
Note: *If people are waiting for any returned titles, AdminSTAR will inform you of this and ask if you would like to see the titles. If you click Yes, AdminSTAR will display all titles that people are waiting for. From that screen, you can select a title and then go to that particular title's Wait List.*

From the Wait List screen, you may loan out this specific copy to one of the people on the Wait List, or you may put it on hold for one of the Learners on the Wait List. To do either, select the Learner, and click on the desired button (Loan or Hold) at the bottom of the screen. The Loan or Hold is then processed.

To Extend a Due Date:

1. In the LIBRARY MANAGER screen, click on the **Extend** button.

2. Enter the Learner ID and press the **Tab key**.



3. All current loans will be shown. There are a few ways in which you can Extend a Due Date.

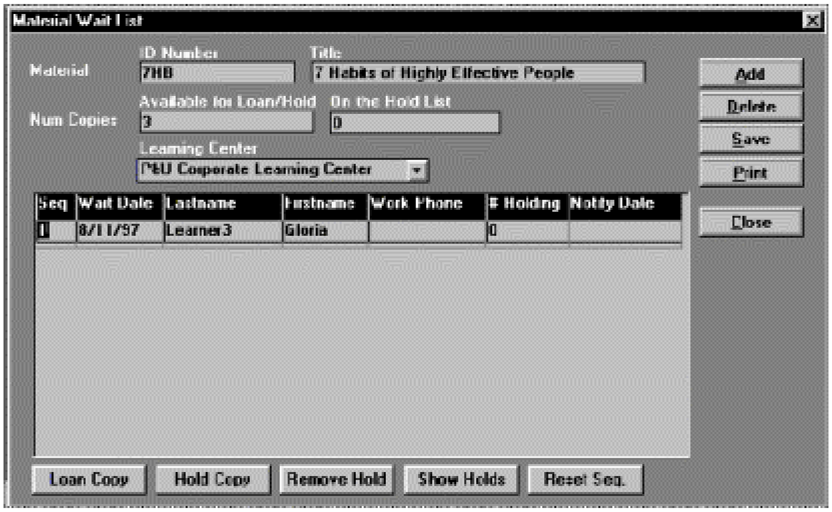
   a. You can type in the new date and click Extend.

   b. You can highlight all of the loans you wish to extend and click on **Set Dates**. If you have the To a Specific Date radio button (at the bottom of the screen) selected, a calendar will be brought up and you can select the new Due Date. Then click **Set Dates**. Click the **Close** button, then, in the EXTEND LOANS screen, click **Extend**. If you have the Ahead 1 Period radio button selected, the date will be set ahead 1 default loan period. Click **Extend** to do this. The loan is now extended.

To Add a Learner to the Wait List:

1. Click on the **Wait List** button in the LIBRARY MANAGER screen.

2. In order to find the title of the Material's Wait List that you would like to view, enter search criteria and click on **Retrieve**. Double click on the Material type that the Wait List is for. Now click on the **Add** button.



3. Enter search criteria and click on **Retrieve**. Select the Learner(s) to be added to the Wait List for this particular Material item. To add the Learner, you can either double-click on their **name**, or select their name and click on the **Add to List** button. The Learner is then added to the Wait List. Click **Close** when finished.

4. Then in the MATERIAL WAIT LIST screen, click **Save**.

To Delete a Learner From the Wait List:

You may not delete a Learner who has Materials on hold. Before you can delete the Learner, you must take their items off hold. Once all items are removed from the Hold List, the Learner can be deleted. To remove a hold, see the section below entitled Removing Holds.

In the MATERIAL WAIT LIST screen, select the **Learner** to be deleted from the Wait List. Click **Delete** and answer **Yes** to confirm. If no Materials are on hold for the Learner, AdminSTAR deletes them from the Wait List.

To Put an Item On Hold:

There are a few basics things to know about holding items. You can put an item on hold from the Return screen, as explained above. Another way to hold an item is through the Wait List. A Learner must be on the Wait List in order to hold an item. Also, in order to hold an item, there must be at least 1 copy of the item available (meaning not checked out) in order to hold.

1. Click on the **Wait List** button in the LIBRARY MANAGER screen.

2. Click **Retrieve** to find the Wait List you want to bring up. Select the item you want to hold by double-clicking on it, or by selecting it and clicking on the **Wait List** button.

3. The MATERIAL WAIT LIST screen shows all Learners currently waiting for the selected item.

4. In this screen, select the Learner for whom the hold is being placed, and click on **Hold Copy**.

5. Now enter the Copy ID Number of the item you are holding and press the Tab key. Click on the **Hold** button and click **OK**. If there are copies available to Hold, the Material will be placed on Hold. (Notice that in the grid on the Material Wait List screen, # Holding now reads 1.)

To Remove a Hold:

1. In the LIBRARY MANAGER screen, click on **Wait List**.

2. Click **Retrieve**. Double-click on the **title**. All of the Learners who have that title on hold will be shown. Select the Learner you wish to remove from the Hold List and click on the **Remove Hold** button.

3. Type in the Copy ID that you will be taking off of the hold shelf. (If you don't know the ID, you can click on the **Show Holds** button (in the Material Wait List screen for a list of all copies holding.) Press the **Tab** key on your keyboard.

4. Now click on the **Remove** button. Click **OK**. The hold is removed.

To Track Inventory Orders:

1. Click on the **Inv. Orders** button in the LIBRARY MANAGER screen.

2. Type in the ID of the inventory that you have ordered copies for, then press the **Tab** key.

3. Enter the Distributor, and Quantity Ordered, then click the **Save** button and click **OK**. The order has been recorded.

Note: *When the Inventory Order arrives, you can update this record with the received date for record keeping purposes if desired.*

To Track the Distribution of Materials:

1. Click on the **Distribute** button in the LIBRARY MANAGER screen.

2. Enter the ID of the Learner who will receive the Materials and press the **Tab** key.

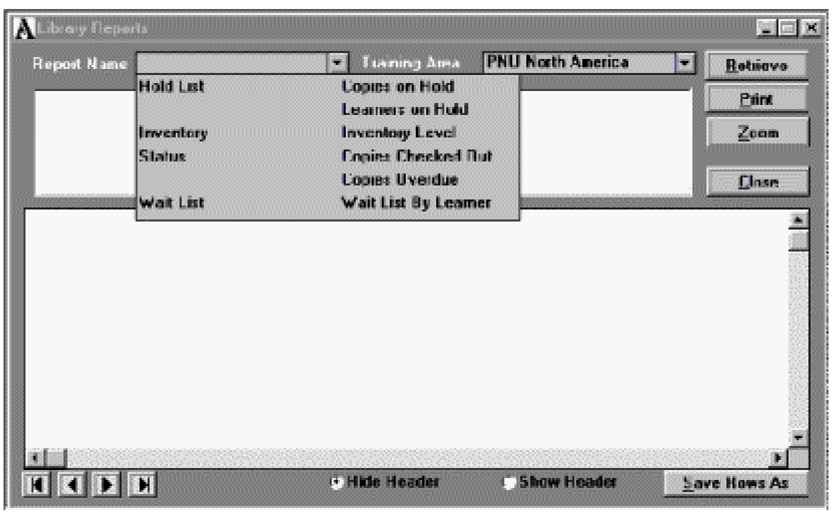
3. Enter the Inventory ID Number of the inventory from which copies will be distributed, then press the Tab key on your keyboard.

4. Enter the number of copies to be distributed.

5. Click on **Distribute**, then click **OK**.

To Create Library Reports:

1. Click on the **Reports** button in the LIBRARY MANAGER screen.



2. Click on the **Report Name** drop down menu in the LIBRARY REPORTS screen.

3. Click on the report desired and then enter the **Arguments** in the drop down menu.

4. Click on the **Retrieve** button in the LIBRARY REPORTS screen.

5. Click on the **Show Header** radio button in order to show the report header.

Using E-mail in the Library Manager

From the Library Manager *Main Menu*, click on the Memos button.

You can send email messages to learners who have loaned materials overdue or on hold.

IMPORTANT NOTE: The MAKE MEMOS and SINGE MEMO buttons are ONLY USED if you are going to create a Word Processing Document - - IT IS NOT used if you are sending an email message.

Sending an email to ALL Learners to notify them that the materials are either OVERDUE or on HOLD,

1. Click on either the **Overdue** radio button or the **Hold** radio button

2. Then click the **E-mail All** button.

Sending an email to a SINGLE Learner to notify him/her that the material is either OVERDUE or on HOLD,

1. Click FIRST on the Learner name

2. Then click on either the Overdue radio button or the Hold radio button

3. Then click the Single E-mail button.

Equipment Manager

Select EQUIPMENT MANAGER from the Manager item on the Menu Bar in the AdminSTAR Main Menu. In the Equipment Manager you will Reserve, Check Out and Check In Equipment, and View Reservations. You ***must*** Reserve an item before it can be checked out.

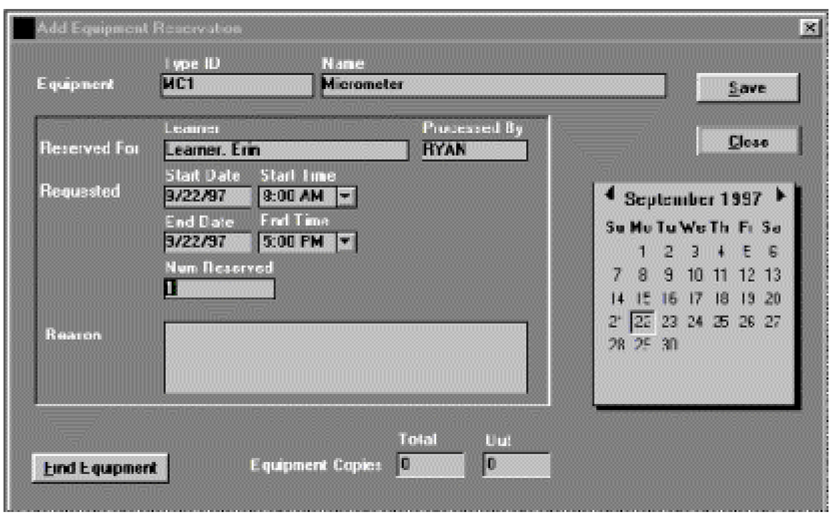
To Reserve Equipment:

1. Click **Reserve** in the EQUIPMENT MANAGER screen.

2. Enter the ID of the Learner who is Reserving the Equipment. Press the Tab key. (All of their current reservations will show up in the window.)

3. Click the **Add** button.

4. Type in the Equipment Type ID of the item to be reserved, then press the **Tab** key. (If you don't know the Equipment Type ID, you can use the Find Equipment button at the bottom of the screen for help.) Enter the Start and End Dates (you can use the calendar at the bottom right) and the number of items of that type to be reserved.



5. Click **Save**.

Note: *If there are conflicting reservations, AdminSTAR will indicate this and you will not be able to reserve.*

To Cancel or Delete a Reservation:

There is an important difference between Canceling a reservation and Deleting a reservation. Canceling a reservation takes the record out of the *active* window, but still stores the record in the database. Canceling is useful if you wish to keep records of canceled reservations. Deleting a reservation deletes the reservation as if it never existed. The record will be wiped out of the database. If you plan on producing Reports that chart canceled reservations, then you will want to Cancel unwanted reservations instead of Deleting them.

Also, AdminSTAR will not let you Cancel or Delete a reservation that has copies checked out. It will only Delete or Cancel reservations for the copies that are not currently checked out. In both cases, if copies are checked out when you Cancel or Delete a reservation, AdminSTAR will set the number reserved equal to the number checked out, thus removing any unwanted reservations that have not already been checked out.

1. Click on the **Reserve** button in the EQUIPMENT RESERVATION screen.

2. Enter the Learner ID and press the **Tab** key on your keyboard.

3. Select the reservation you want to Cancel or Delete.

4. Click on **Cancel** or **Delete**, then click OK to confirm.

To Check Out Equipment:

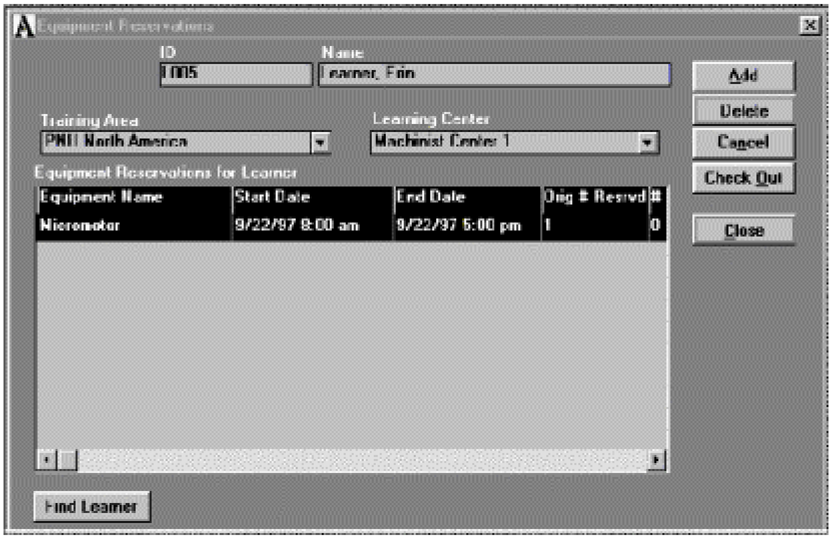
In order to check out Equipment, you must first bring up the reservation. Then you will be able to check it out. Also, *AdminSTAR will not let you check out an item more than 15 minutes before its reservation start time*. This avoids scheduling conflicts. AdminSTAR will give you a warning if you try to do this.

1. In the EQUIPMENT MANAGER screen, click on the **Reserve** button.

2. Enter the Learner ID or use the **Find Learner** button if you do not know it. Press the **Tab** key. All of the Learner's reservations will show up below.

3. Select the item that the Learner wants to check out. Click on the **Check Out** button.

Note: *Remember, you will not be able to check out an item more than 15 minutes before its reservation start time. In order to check it out before its reserved start time, you must bring up the reservation, modify it and save the changes. If AdminSTAR warns you of conflicts, the reservation changes attempted will not be saved.*



4. Enter the specific Copy ID of the item being Checked Out. Click **Check Out**, then click **OK**.

To Check In Equipment:

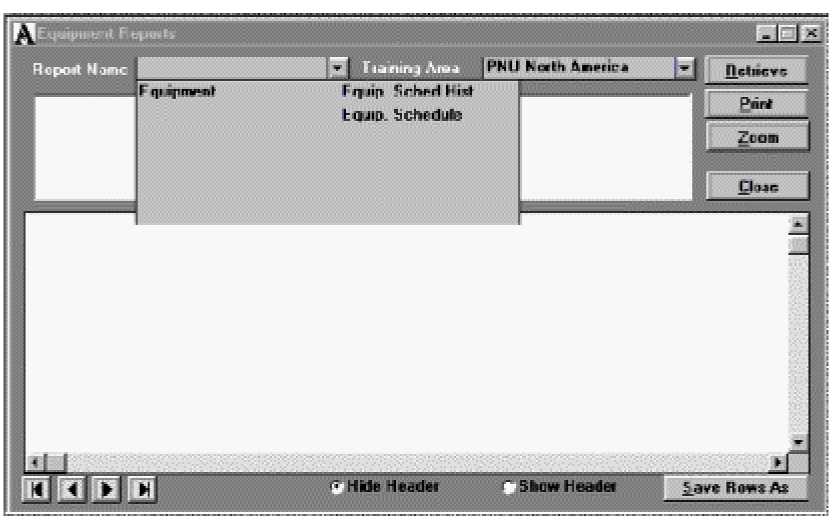
1. In the EQUIPMENT MANAGER screen, click on **Check In**.

2. Enter the Training Region, Learning Center and Copy ID of the Material being checked in.

3. Click the **Check In** button. Click **OK** to complete the transaction.

To Create Equipment Reports:

1. Click on the **Reports** button in the EQUIPMENT MANAGER screen.



2. Click on the **Report Name** drop down menu in the EQUIPMENT REPORTS screen.

3. Click on the report desired and then enter the **Arguments** in the drop down menu.

4. Click on the **Retrieve** button in the EQUIPMENT REPORTS screen.

5. Click on the **Show Header** radio button in order to show the report header.

Room Manager

Select ROOM MANAGER from the Manager item on the Menu Bar in the AdminSTAR Main Menu. The Room Manager is used to reserve rooms and schedule, track and display their activity. *You do not schedule Rooms for Courses here.* Basically, the Room Manager is used to schedule and track Rooms when used for meetings, seminars, conferences and other daily activities.

Note: *You will not be able to enter, edit or delete a room reservation for a Course from the Room Manager. You can edit a Course's Room information* ***only*** *through the Course Manager. While all Room reservations, including those of scheduled Courses, will show up in the Room Manager, you will not be able to edit Room information that was entered in the Course Manager. You will, however, be able to edit all Room information that was created in the Room Manager.*

To Create a Room Reservation:

1. Click on the **Reserve** button in the ROOM MANAGER screen.

2. Select the Training Region and the Room you wish to reserve.

3. Click on the **New** button.

4. Enter the day that the reservation is for. The calendar at the bottom of the screen makes this easy to do.

5. Enter the **Start** and **End Times** of the reservation. Enter the Reason why you are reserving, and the Person Reserving. (Use the scroll bar at the bottom to fully view these fields.) Click the **Save** button, then click **OK**.

6. AdminSTAR automatically creates another line for another reservation if needed. (If this line is not used, it will automatically delete upon closing.)

Note: *AdminSTAR will automatically warn you if there are scheduling conflicts when you create a new reservation. You will still be allowed to schedule when a conflict is indicated if you decide to over-ride the warning.*

To Edit or Delete a Room Reservation:

1. Select a RESERVATION by clicking on **Reserve** in the **Room Manager** screen.

2. Then select the Training Region and Room for the reservation to be deleted or edited.

3. Select the Room which you want to edit or delete. To delete it, click the **Delete** button.
4.
5. Click **Yes**, then click **OK** and the selection is deleted.

6. To edit Room information, double-click on it to show the information in the EDIT ROOM RESERVATION screen. Make your changes, click **Save**, then click **OK**. AdminSTAR will warn you of all scheduling conflicts, but allows the user to over-ride them

7. When finished, click **Save**, then **OK**.

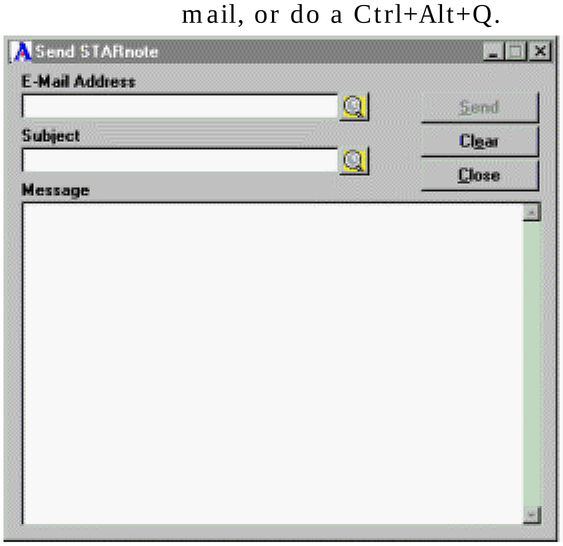
Room Reservations: User Defined Fields

By selecting the User Defined fields button users are allowed to enter in values for the User Defined fields as they relate to this particular Room Reservation. See also Dynamic User Defined Fields (Appendix A.).

STARnote

To send a STARnote:

1. From the pull down menu under File select STARnote E-mail, or do a Ctrl+Alt+Q.



2. On the STARnote E-mail Screen the user can use the magnifying glass (search key) to select the learner that they wish to send to, or enter the exact E-mail address.

3. Fill in the subject line, and enter the note information.

4. Hit send to send out the message. Clear will blank out everything on the screen.

Note: *This form of e-mailing is not intended to replace the e-mail merges that occur when messages are sent from within the managers. It is meant only to provide a way for users to send notes to learners without having to leave AdminSTAR.*

Introduction To E-mail

The e-mail function in AdminSTAR Version 4.4.0.0.0 allows administrators to send e-mail messages to Learners to confirm the following actions:

Scheduling a Learner into a Class or that they have been put on the Waitlist

Scheduling a Learner into a Multimedia Learning Center Station

Notifying a Learner of a Library material that is overdue or on Hold

Scheduling a Learner into a Vendor course

Important Note:

AdminSTAR e-mail messaging is MAPI compliant and IS NOT VIM compliant as of this writing.

See Also:

Part 1Set-up E-Mail
Part 2 Mere Data into Messages
Part 3 Field Name Descriptions for Messages
Using E-Mail in Learning Center Manager
Using E-Mail in Library Manager

E-Mail Setup - Stock Messages

Part 1 Setup E-mail

Prior to using email system, System Administrators need perform necessary set-up activities.

A. The a_start.ini file

The a_start.ini file has been changed to include a number of e-mail settings.

There are now three separate switches. Any existing EMAIL= line may be removed, as it will be ignored anyway.

The new settings are as follows:

EMAIL_ADDR=

0: (default value) E-mail addresses will go into the NAME field in the MAPI structure.

1: E-mail addresses will be placed in the MAPI ADDRESS field.

EMAIL_RESOLVE=

0: AdminSTAR will not call the MAPI mailResolveRecipient function prior to sending the message.

1: (default value) AdminSTAR will attempt to resolve the recipient prior to sending.

EMAIL_DIAG=

0: (default value) No diagnostic messages will be displayed while processing e-mail, aside from basic success/failure messages.

1: AdminSTAR will bring up diagnostic messages during the e-mail process; this can be helpful in ferreting out e-mail problems.

The settings should be placed in the A_START.INI file in the [Program] section; if they are left out, AdminSTAR will use the default settings indicated above.

For example:
[PROGRAM]

EMAIL_ADDR=0
EMAIL_RESOLVE=1
EMAIL_DIAG=1

Note: By adding the following to A_START.INI, you can disable e-mail from the approvals screen. This way if you are not going to use E-mail through AdminSTAR you will not be asked if you wish to send messages.

[PROGRAM]
(somewhere in the [PROGRAM] section)
EMAIL_APPROVE=0

If the value is zero, it'll be disabled. If it is not present, or anything other than zero, and e-mail will be turned on.

B. Setting up Stock E-mail Messages

AdminSTAR allows you to set up stock e-mail messages that are stored within the database. This set-up procedure needs to be done by a System or Regional Administrator. AdminSTAR will store messages in a two level hierarchy. The first level is labeled **Global**. The second is specific to particular Training Regions. When AdminSTAR sends an e-mail message it will first check in the database for messages defined for the particular Training Region where the message is being sent from. If there is no message defined for that particular Training Region then AdminSTAR will pull the default message from the **Global** messages.

To begin this process move into the **Setup Screen.** Inside the **Setup Screen** go into the Global Menu and select the **Starnotes** option. Begin by selecting **Global** from the **Training Area** pull down. Now you are ready to start creating your system wide default messages.

There are 5 e-mail message templates that need to live inside this folder.

Their names are:

CLASS_CONFIRM	Class Confirmation Memo
WAITLIST	Waitlist notification
SELF_STUDY	Learning Center Confirmation Memo
HOLD	Hold Notice Memo
OVERDUE	Overdue Notice Memo
VENDOR_APPROVAL	Vendor Course Confirmation Memo
CLASS_DROP	Drop notification to Supervisors when a Learner drops a course (Only in AdminSTAR Learner)
CLASS_ENROLL	Enroll/Request notification to Supervisors when a learner enrolls/requests enrollment in a course (Only in AdminSTAR Learner)

IMPORTANT NOTE: Do <u>NOT</u> change the names of these subjects. AdminSTAR expects to find these specific names in the StarNOTES setup screen.

Any of these 6 subjects may be edited; the maximum length of each message is 2MB.

In each of the e-mail message templates, you use EXACT field names from AdminSTAR database tables. When the e-mail message is sent, the field names are replaced with the appropriate information from the AdminSTAR database.

Part 2 Merge Data into messages

Before sending ANY email messages, you first need to EDIT each of the email message templates. (see Part 1) AdminSTAR merges the actual data into your e-mail message by placing this data into the field names that are in double-brackets.

For example, double bracketed [[lastname]] will return the learner's last name into your e-mail message. If no information is available for a field, the bracketed field name will be replaced with empty space.

IMPORTANT NOTE: double bracketed field names <u>must</u> be in all lower-case, or they will be IGNORED!

Below is an example of how you could create a Class Confirmation Memo using the CLASS_CONFIRM subject.

Dear [[firstname]] [[lastname]]:

You are scheduled for the following course date(s) for the [[course_name]] class. Classes will be held at [[room_location_name]].

[[schedule]]

When this e-mail message is sent, the actual type of data would look like this:

Dear Joe Learner:

You are scheduled for the following course date(s) for the AdminSTAR Training – Beginner's class. Classes will be held at Turn-key Main Headquarters.

Day 1: August 19,1997 8:00 AM to 12:00 PM @ The Learning Room
Day 2: August 21,1997 8:00 AM to 12:00 PM @ The Learning Room

IMPORTANT NOTE: The double bracketed [[schedule]] field is a special fieldname that will display the complete training schedule for a particular course, i.e., all days, times, and rooms.

Part 3 Field Name Descriptions for Messages

A list of subject examples and field names for each type of e-mail message follows.

Overdue Notices

Subject: OVERDUE

Example of e-mail message

[[firstname]] [[lastname]]:
The following training material(s) were due on [[due_date]].
Please return them as soon as possible.
[[title]]

Fieldnames	Description
lastname	Learner's Last Name
firstname	Learner's First Name
title	Name of the Material Loaned
copy_id	Specific ID of the copy loaned
borrow_date	The date borrowed
due_date	The date due back
last_notified	Date Learner was notified
work_phone	Learner's work phone
drop_code	Mail code of Learner
location_name	Location of Learner
address	Address of Learner
city	City of Learner
state	Stateof Learner
zip	Zip code of Learner
mailcode	Mail code of Learner
email_id	E-mail id of Learner

Hold Notices

Subject: HOLD

Example of e-mail message

[[firstname]] [[lastname]]:
The following training material(s) on hold for you.
Please pick them up as soon as possible.
[[title]]

Fieldnames	Description
lastname	Learner's Last Name
firstname	Learner's First Name
title	Name of the Material Held
work_phone	Learner's work phone
drop_code	Mail code of Learner
location_name	Location of Learner
address	Address of Learner
city	City of Learner
state	State of Learner
zip	Zip code of Learner
mailcode	Mail code of Learner
email_id	E-mail id of Learner

Classroom Confirmations

Subject: CLASS_CONFIRM

Example of e-mail message

[[firstname]] [[lastname]]:
You are scheduled for the following course date(s) for the [[course_name]] class. Classes will be held at [[room_location_name]].
[[schedule]]

Fieldnames	Description
lastname	Learner's Last Name
firstname	Learner's First Name
department_name	Department name of Learner
work_phone	Learner's work phone
drop_code	Mail code of Learner
location_name	Location of Learner
address	Address of Learner
city	City of Learner
state	State of Learner
zip	Zip code of Learner
mailcode	Mail code of Learner
email_id	E-mail id of Learner
course_id	ID of Course
course_name	Name of Course
date_range	Range of dates for course
starttime	Start time for course
endtime	End time for course
schedule	Complete schedule for course

room_name	Name of classroom
room_location_name	Location of classroom
location_address	Address of classroom
location_city	City of classroom
location_state	State of classroom
location_zip	Zip code of classroom

Waitlist Notification

Subject: WAIT_LIST

Example of e-mail message

[[firstname]] [[lastname]]:
You have been added to the wait list for the following course [[course_name]].

Fieldnames	**Description**
lastname	Learner's Last Name
firstname	Learner's First Name
work_phone	Learner's work phone
email_id	E-mail id of Learner
course_id	ID of Course
course_name	Name of Course

Learning Station Schedule Notices

Subject: SELF_STUDY

Example of e-mail message

[[firstname]] [[lastname]]:
A learning station ([[station_name]]) has been reserved for you to take the [[course_name]] course. The [[title]] is scheduled for you on [[day]] from [[start_time]] until [[end_time]] at the [[learning_center]].

Fieldnames	**Description**
lastname	Learner's Last Name
firstname	Learner's First Name
department_name	Department name of Learner
work_phone	Learner's work phone
drop_code	Mail code of Learner

location_name	Location of Learner
address	Address of Learner
city	City of Learner
state	State of Learner
zip	Zip code of Learner
mailcode	Mail code of Learner
email_id	E-mail id of Learner
learning_center	Name of the Learning Center
station_name	Name of the Learning Station
course_name	Name of the Multimedia Course
title	Name of the Multimedia title
copy_id	Start time of scheduled session
end_time	End time of scheduled session

Vendor Courses Approval Notices

Subject: VENDOR_APPROVAL

Example of e-mail message

[[firstname]] [[lastname]]:

Your request for enrollment into course [[course_name]] is [[approval_status]].

Course Information

Course:	[[course_name]]
Vendor:	[[vendor_name]]
Instructor:	[[instructor_name]]
Start Date:	[[begin_date]]
End Date:	[[end_date]]
Course Type:	[[vendor_course_type]]

Fieldnames	**Description**
begin_date	Day the Course begins
end_date	Day the Course ends
instructor_name	Name of the Instructor
vendor_course_type	Type of course
approval_status	Shows if the learner is approved, denied, or pending approval
course_name	Name of the Course
vendor_name	Name of the Vendor
firstname	First Name of the Learner
lastname	Last Name of the Learner

Caution!

In order for you to send an email message, **<u>YOU MUST</u>** have an email address for the Learner in the email field located on the Edit Learner – Work Information screen.

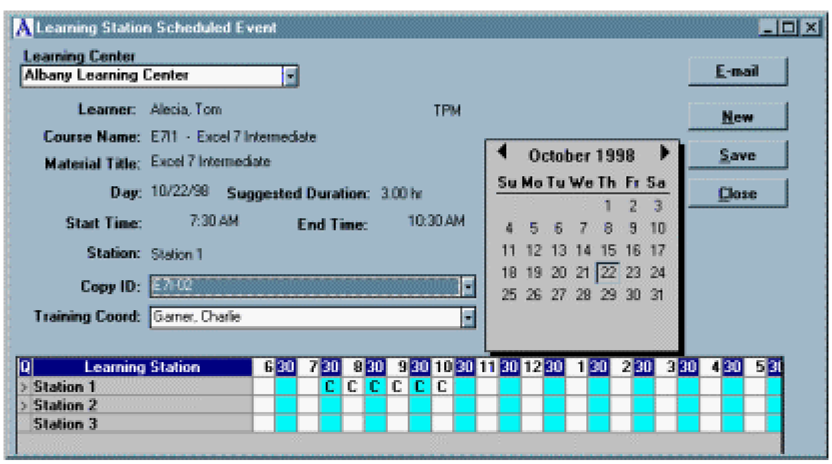
Sending E-Mails

Using E-mail in Learning Center Manager

To Send an e-mail to a Learner in the Learning Center Manager:

First - Enroll & Schedule a Learner into a Multimedia Course

1. Click on the New button to create a new multimedia enrollment.
2. Enter the Learner you want to enroll and press TAB.
3. Click on the drop down list for Course and select a Multimedia Self-Study course to enroll the learner into.
4. Highlight the material title that you want to schedule, then click on the Schedule button.
5. Click on the DAY in the calendar that you want to schedule the multimedia material and the Learning Station *Scheduling Grid* will appear at the bottom of the screen.
6. Click on a BEGIN time block to enter the start time for the self-study. A row of Capital C's (which stands for Current Booking) will appear in the row you clicked on.
7. The next step is to choose the Material Copy. Click on the drop down list for Copy ID and select an available material copy, then click Save.

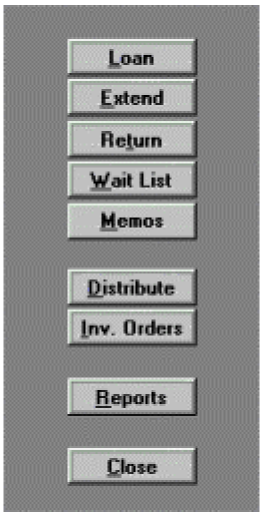


Third – Send an e-mail to the Scheduled Learner

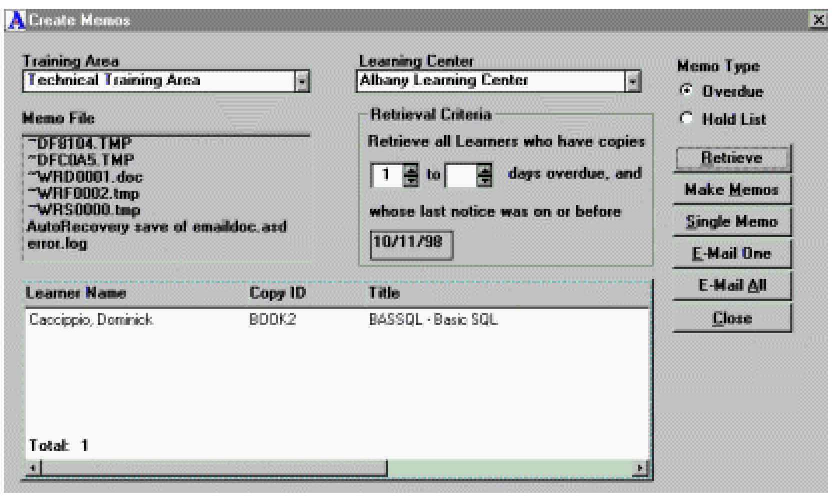
1. Click on the **E-mail** button in the upper right hand corner. The Learner will be sent an e-mail message confirming the schedule in the Learning Station.

Using E-mail in Library Manager

From the Library Manager *Main Menu*, click on the Memo button.



You can send email messages to learners who have loaned materials overdue or on hold.



IMPORTANT NOTE: The MAKE MEMOS and SINGE MEMO button is ONLY USED if you are going to create a Word Processing Document - - IT IS <u>NOT</u> used if you are sending an email message

If you are going to send an email to **ALL** Learners to notify them that the materials are either OVERDUE or on HOLD,

1. Click on either the **Overdue** radio buoon or the **Hold** radio button
2. Then click the **E-mail All** button.

If you are going to send an email to **a SINGLE** Learner to notify him/her that the material is either OVERDUE or on HOLD,

1. Click FIRST on the Learner name
2. Then click on either the Overdue radio button or the Hold radio button
3. Then click the Single E-mail button.

That's all there is to it!

AdminSTAR Reporting

AdminSTAR? provides a number of standard reports. Reports are for learners, instructors and administrators of courses, self-study learning centers and lending libraries.

The reporting capability within AdminSTAR allows you to easily include the Company Logo and appropriate Header information, as for example, date and page numbers.

The Report function has a common interface and is used in all the Managers. The administrator can choose the report from the drop down window, change any of the reporting arguments and retrieve the report on the screen. To create a report and print it:

1) Click on the Report Name drop down and choose a report.
2) Different Selection Criteria appear in the Arguments window
3) For example, you might see a drop down for time periods, or a drop down for course names, or a date range field, etc.
4) Select from the various selection criteria in the Arguments window
5) Click on Retrieve and the information will be displayed in the Report Listings window
6) To look at more than one page, use the arrow buttons in the lower left
7) To turn the Report Header ON/OFF, click on the Hide Header/Show Header buttons
8) To resize the report, click on the Zoom button and choose a size.
9) To print the report, click on the Print button.

The Classroom Manager Reports

AdminSTAR currently provides 13 reports to track course planning and scheduling and learner attendance and completion. Those reports are:

For Planning

Course Enrollments Report

For Scheduling

Monthly Course Schedule
Monthly Instructor Schedule

Monthly Room Schedule
Wait List Report

For Attendance & Completion Tracking

Taking Attendance Sheet
Attendance Report

For Billing

Charge Sheet by Department
Billing Report by Division
Total Income Report

The Library Manager Reports

AdminSTAR currently provides 6 reports to track material and learner reservations and material status. Those reports are:

For Material Reservations

Copies on Hold for Learners
Learners on Hold for Material Copies

For Inventory Reporting

Inventory Level Report

For Material Status

Material Copies Checked Out
Material Copies Overdue

For Material Wait Lists

Material Wait Lists by Learner

The Equipment Manager Reports

AdminSTAR currently provides 2 reports to track equipment schedules and schedule history. Those reports are:

For Equipment Schedules and Schedule History

Equipment Schedule History Report
Equipment Schedule Report

Glossary

Terms Used with Log In

Login

The process on entering AdminSTAR by typing in a USER ID and PASSWORD and pressing Enter.

Password

The personal, confidential word that a user uses to login to AdminSTAR.

User ID

The name that is provided by the System Administrator used to login to AdminSTAR.

General Search Screen

This is the screen from which general searches may take place to find all available training resources in a Training Area, including self study courses, instructor led courses, and other learning materials like books, video tapes, etc.

Status Screen (Main Menu)

This is the AdminSTAR Main Menu. At the Daily Status screen, the administrator can see the status of what is happening with scheduled courses, reserved equipment and rooms for any day of the month.

Terms Used with Set-Up

Database Privileges

Certain rights that are granted to Staff Level 1, Staff Level 2 and Instructors to perform (or not perform) certain functions in AdminSTAR. There are thirteen (13) types of privileges that can be granted. As an example, may this administrator run reports?

Database Users

These are the database roles in AdminSTAR. Users of AdminSTAR can be defined as System Administrators (able to edit and view ALL training areas), Regional (AREA) administrators (able to edit their own training area and view others) and Staff Level 1, Staff Level 2 and Instructor.

Hierarchy 1

This is the FIRST division, or organization unit, defined for your organization. An example might be Division or Business Unit or Affiliate.

Hierarchy 2

This is the SECOND division, or organization unit, defined for your organization. An example might be Department or Site or Branch. Specific second division units belong under first division units. For instance, a department is under a division, or a site is under a business unit, etc.

Learning Centers

Learning Centers are places where learners can take part in multimedia self-study at multimedia learning stations or have materials loaned to them from the multimedia library.

Locations

Locations are addresses, including cities, states, zip codes, contact persons, etc. that are associated with various PLACES in AdminSTAR, including Organizational Hierarchy 1, Organizational Hierarchy 2, Training Areas, and Learning Centers.

Regional (Area) Administrator

The regional or area administrator has jurisdiction over a defined TRAINING AREA. This area administrator can EDIT, i.e., add, change and delete information for his/her area. Furthermore he/she can MANAGE, i.e., schedule and track training for his/her area. A regional administrator can VIEW other training resources in other Training Areas.

Set Up

The process of defining and customizing AdminSTAR for your own organization is divided into SYSTEM-WIDE Set Up and REGIONAL (AREA) Set Up. System-Wide Set Up defines AdminSTAR across the whole organization, whereas Regional (Area) Set Up defines how AdminSTAR will behave for a particular training area.

Staff Level 1 & 2

These are the database user levels below Regional (AREA) Administrator. An Area Administrator has the ability to turn on/off the 13 privileges for a Staff Level 1 or Level 2 administrator.

Supervisors

These are users of the AdminSTAR Learner module. Supervisors are created in AdminSTAR Admin, and then are assigned to specified learners in AdminSTAR Learner. They have limited DB rights which include viewing their employees training records.

System Administrator

The system administrator has jurisdiction over ALL TRAINING AREAS. A system administrator can EDIT, i.e., add, change and delete information for ALL areas. Furthermore he/she can MANAGE, i.e., schedule and track training for ALL areas.

Training Area

A training unit that has responsibility for providing (delivering) training to certain organizational group(s) or geographical area.(s).

Terms Used with Editors

Courses

A unit of study. Courses can be defined as Group Study, i.e., classroom, instructor led, or Self Study, i.e., taken at a multimedia learning station. Each Course has occurrences within a planned time period.

Curriculum

A curriculum is a group of one or more courses. Courses are usually related to each other by subject matter and difficulty level. There is usually a predetermined order in taking the courses within the curriculum.

Vendors

A distributor in AdminSTAR is a training vendor. This is the company, address, and people that provide training equipment and learning materials to your Training Area.

Distributable Material

AdminSTAR defines three types of Learning Materials, 1) Self-Study, 2) Loanable and 3) Distributable. A distributable material is one that is provided to a learner within a training program and return is not expected. An example would be a training manual. This material is differentiated from a loanable material that would be returned.

Editors

This is the program module in AdminSTAR that allows the administrators to edit all the training data used in AdminSTAR. Editors allow editing of data for Learners, Instructors, Rooms, Multimedia Learning Stations, Curriculums, Courses, Learning Materials, Training Equipment and Distributors.

Edit (Detail) Screen

This a screen in each of the editors that allows the administrator to edit the detail of any of the records. From here you can also add a new record or copy an existing record to make a similar one. You get to the Edit Screen by double clicking on any record listed in the Find (Retrieve) screen.

Required Curriculum

The is a central training plan for a learner to succeed from one job/skill set to a more advanced job skill/set or position. This curriculum is usually composed of required courses that are taken in a certain sequence.

Recommended Curriculum

This is NOT a central training plan for a learner to succeed, but is a recommended curriculum for the Job/Skills Set. This curriculum is usually composed of recommended courses that are taken in a certain sequence.

Optional Curriculum

This is NOT a central training plan for a learner to succeed, but is an optional curriculum for the Job/Skills Set. This curriculum is usually composed of optional courses that are taken in a certain sequence.

User - Defined Fields

User - Defined Fields are labels which can be created and assigned to Materials, Learners, and Courses. Up to 15 labels can be assigned to each.

Handicap Code

A code given to learners which have a specific handicap. This code then is used for reporting purposes and also to identify locations equiped with handicap facilities.

Equipment Title

The training equipment title also includes an ID. An example might be a Video Tape Player.

Equipment Copy

The specific physical copy of the training equipment includes a COPY ID. An example might be VTP COPY #1.

Find (Retrieve) Screen

This a screen in each of the editors that allows the administrator to find ALL the records or specific records based on retrieval criteria that is entered. The wildcard, %, may be used to help in searching for specific records.

Instructor

The person who provides instruction in a classroom. In AdminSTAR, instructors are associated with courses that they are qualified to teach.

Job/Skill Set

This could be a job position in a company or a set of skills that are necessary to perform a certain task or job. Job/Skill Sets can be associated with Learners and core curriculums in a Individual Development Plan.

Learners

Learners are those people who are engaged in the learning process, through group study (classroom, instructor led) or self-study. Learners can either have administrators enroll them in course occurrences or can self-enroll depending on how AdminSTAR is set up.

Learning Material

A material used in either Group Study or Self Study training. An example might be a book, a Compact Disk, a magazine, a Laserdisc, a video tape, an audio tape, a manual. Learning materials are usually text based or multimedia based.

Learning Station

A personal computer station that is equipped to deliver some type of computer based instruction, even multimedia training, i.e., video, audio, text, graphics, animation, etc. Learning Stations can have Video Tape payers, CD-ROM players or Laserdisc players included with them.

Loanable Material

AdminSTAR defines three types of Learning Materials, 1) Self-Study, 2) Loanable and 3) Distributable. A loanable material is one that is provided to a learner within a training program and it is expected to be returned. An example would be a video tape. This material is differentiated from a distributable material that would NOT be returned.

Material Title

Material title is the name of the learning material, which also includes an ID. An example might be The Seven Habits of Highly Successful People, ID = 7HABITS.

Material Copy

Material Copy is the specific physical copy of the learning material, which includes a COPY ID. An example might be 7HABITS COPY 3.

Prerequisite

A course requirement that must be completed prior to being enrolled in a training program.

Rooms (Classrooms)

Places where instructor led training occurs. Rooms are defined in the Editor and scheduled in the Course Manager.

Self-Study Material

AdminSTAR defines three types of Learning Materials, 1) Self-Study, 2) Loanable and 3) Distributable. A self-study material is one that is provided to a learner at a multimedia, self study learning station in a Learning Center.

Individual Development Plan

Sometimes called Career Path or Learning Track, this is a specific training plan assigned to a Learner based on the Job Skill/Set that the learner is trying to succeed to. This IDP may include a Required, Recommended, and an Optional Curriculum.

Training Equipment

Equipment that is used for delivering training, as for example, a video tape player.

Terms Used with Managers

Commitment

The process that an Area Administrator goes through to plan for the number of Course occurrences in a Time Period is a Commitment schedule. Inquires are sent to various Business Units, or Divisions, asking how many learners they will be committing to various training courses throughout a certain period of time.

Classroom Manager

The program module in AdminSTAR that allows an administrator to manage the scheduling and tracking of Group Study (classroom, instructor led) courses.

Course Occurrence

A specific instance of a course. There can be 1 or many occurrences of a course in any defined time period. Occurrences eventually are assigned dates, times, rooms, instructors, etc.

Equipment Manager

The program module in AdminSTAR that allows an administrator to manage the scheduling and tracking of training equipment that needs to be reserved and then checked out.

Learning Center Manager

The program module in AdminSTAR that allows an administrator to manage the scheduling and tracking of Self-Study (multimedia delivered) courses.

Lending Library Manager

The program module in AdminSTAR that allows an administrator to manage the scheduling and tracking of learning materials provided through a lending library.

Library Wait List

A list of those people that are waiting for a learning material to be returned. Once the material is returned, the administrator can remove them from the Wait List and loan the material to them or place them on the Hold List (See Below)

Library Hold List

A list of those people for which a learning material is being held. Their name has been taken off the Wait List but the material has not been given to them yet.

Managers

The five (5) program modules in AdminSTAR that allow an administrator to manage the scheduling and tracking of training.

Preschedule

The process of establishing a training time period, gaining commitments from various divisions, and then making a schedule for training.

Room Manager

The program module in AdminSTAR that allows an administrator to manage the scheduling and tracking of classrooms that needs to be reserved.

Time Period

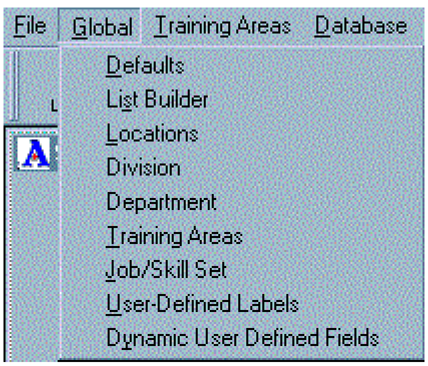
A period of training time defined by the administrator in the Planning module of AdminSTAR. A Time Period can be any length of time and has to be defined prior to any courses being scheduled.

Appendices

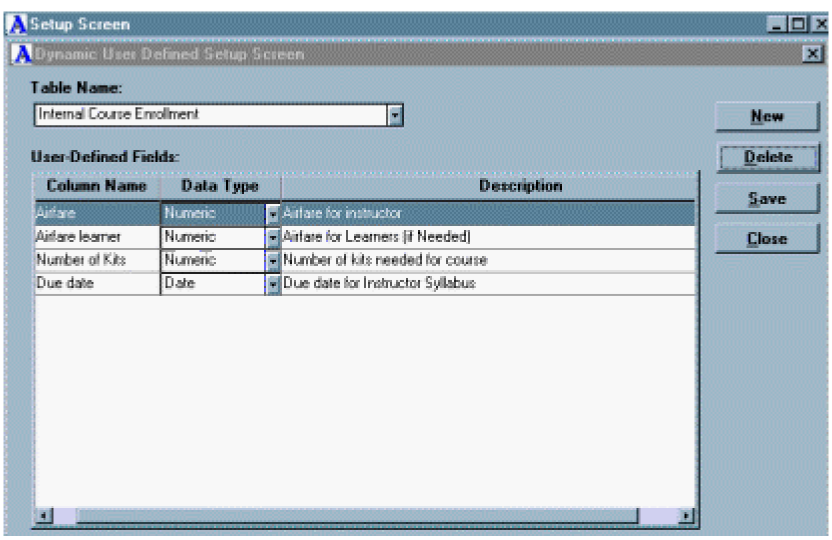
Dynamic User Defined Fields

Dynamic User defined fields were added to AdminSTAR to in an attempt to make them more useful to users of AdminSTAR. Dynaimc User defined fields are now unlimited in number and can be set to one of three different formats, text, numeric, or dates.

Dynamic User defined fields are set up by going into the setup screen. Under Global, you will find a new option at the bottom of the list called Dynamic User Defined Fields. When you select on the Dynamic User defined field option the following window will appear.



Adding new user defined fields is done completely from this window.



1. Begin by selecting the table name from the pull down list. This table name will correspond with the location in AdminSTAR where the DUDF (Dynamic User Defined Field) can be accessed.
2. After selecting your table click on the "New" button to add a a blank row to the bottom of the list. Once the row has been added you can enter in the field name, select the data type, and enter a description field.
3. The data type can be used to distinguish between text, numeric and date fields.
4. When you have entered the necessary Dynamic User Defined Fields for this table hit save, and move on to the next table.

The Dynamic User Defined Fields available are as follows:

Equipment: entered within the Equipment Editor

Equipment Copy: entered within the Equipment Editor (when adding Physical Copies).

Instructor: entered within the Instructor Editor

Internal Course Enrollment: default values can be entered within the Course editor, and the values can be further updated from the enrollment screen attached to an occurrence of a course.

Internal Course Occurrence: default values can be entered within the Course editor, and the values can be further updated from the action menu attached to an occurrence of a course.

Internal Course Occurrence by day: values can be updated from the Edit Scheduled Courses screen attached to an occurrence of a course. These fields are specific to the particular day on which the course occurs.

Room: entered within the Room Editor

Room Schedule: entered within the Room Schedule Manager

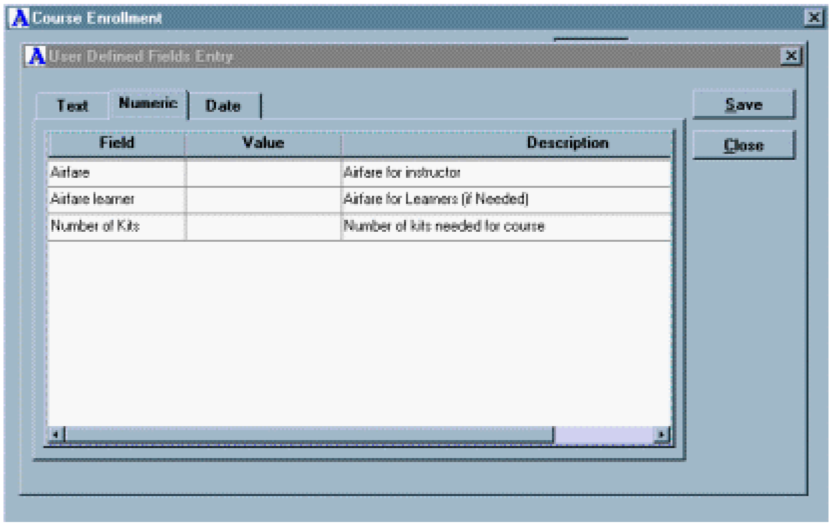
Self-Study Enrollment: entered within the Self-Study Instance screen

Training Region: entered with the Training Editor screen which is in the Setup section of AdminSTAR. It can be accessed using the Global drop down menu.

Vendor: entered within the Vendor Editor

The following is an image from the Course Editor. The buttons **marked "Enroll Defaults**", "**Occur. Defs**", and "**SS Occ.Defs**" are all used by the DUDF Function. From the Course Editor, these buttons allow users to identify default values for User Defined Fields. These values become associated with a particular course, and every time this course is used, the default values will be set for that occurrence of the course.

From the location where you are accessing the Dynamic User Defined Fields you will see a button labeled "**User Fields**". When you select this field the following window will appear.



From this window you can now add your value that you wish to associate with the field name that you are updating. Simply select from the tabs at the top of the window the data type that you need. From the list, select your field name and click in the **Values** column. Now you can enter your value and hit **Save**. If you have entered default values you can either leave them as they appear, or you can update them for this particular course occurrence or enrollment.

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