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Introduction

Pathlore Learning Management System (LMS) is a software application with web capabilities used by the Department for Children and Families (DCF) to support the training management of the agency and its limited partners. This LMS is used for administration, delivery, documentation, tracking and reporting of instructor-led and online trainings.

Staff designated as Pathlore Administrators, use their privileges within Pathlore to set up classes, register staff for classes, track training, add notes to training, record completed trainings or add or modify persons. While the end user does not directly work within Pathlore, they benefit from the functions of Pathlore through the Training Center.

In addition to information about the Pathlore system, this manual provides information on Crystal Reports, a third-party reporting system used to access Pathlore training data. Pathlore Administrators may use Crystal Reports to access established reports which provide information such as “who has taken a training”, “who has not taken a training” or “who is in a particular group”. Trainer’s rosters, sign-in sheets, certificates and transcripts can also be generated through Crystal Reports.

We hope that this manual assists you in using the many functions within the Pathlore LMS as well as Crystal Reports. Should you desire additional support, please contact us at DCF.LMSsupport@ks.gov or at 785-296-4327.

Terminology

Activate – To change a person, class or course from an Inactive status to an Active status.

Active Person – Active people are those who have been and may continue to be registered for training events or may participate in events.

Adobe Connect – Conferencing software used to conduct trainings or meetings.

Append – To add to a roster when enrolling persons in a class.

Batch – To group several people or classes.

Blended Learning – Participants participate via face-to-face instructions and online training, for one class.

Canceled (C) – A registration status given to a person who had a status of “Enrolled” (E) in the class, but no longer plan to attend.

Canceled – Bill (B) – A registration status given to a student who had a status of “Enrolled” in the class, but no longer plan to attend and the student is to be billed for the cancelation.

Capacity Allocation – The process which allows a specific number of seats to be allocated to an allocation group. This function prohibits registration beyond the assigned capacity allocation.

Certificate – Documentation certifying a person has successfully completed a class.

Class – An individual offering of a Course.

Classroom Instruction – Training provided to a group through face-to-face instruction.

Computer Based Training (CBT) – Self-paced training accessible by way of a computer. It differs from web-based training in that it does not communicate with a learning management system (Pathlore). (Example: training from a CD)

Conference – A participant takes part in a conference, external to DCF, either individually or with a group and attendance at said conference is documented in Pathlore.

Content – Instructional information that is a unit of study, or a collection of units of study.

Content Object – An LMS organizing element in an online course that references content. It serves as a connection between the content and the course in Pathlore.

Course – A template used to create classes.

Course Code – Naming convention used as a link between a course and all classes created from that course. (Ex: SDIMRG0108)

Crystal Reports – A third party report writing program use to create reports using data from Pathlore. Besides creating reports, Crystal Reports can also be used to generate sign-in sheets, rosters, transcripts and class certificates.

Curriculum – An organized set of courses assigned to one or more groups or individual learners.

Eligibility – Students eligible to take a class based on data in their person record. (i.e., job title or department)

Employee ID – The unique identification number assigned to each person in Pathlore. For State of Kansas employees, the identification number is the person’s actual Employee ID number. For persons outside of the State of Kansas, a unique number is created for the person specific to the outside agency they work for (specific instructions are provided to each agency regarding Employee ID numbers).

Enrolled (E) – A registration status given to a person who plans to attend the class.

Enrollment – The process of assigning the registration status of “Enrolled” to a person to a class.

Equivalent (V) - A registration status used to record that a person already has the knowledge being imparted within a course. (NOTE: This knowledge should be from some outside training source. If the training came from a course in Pathlore, the course itself should be made the equivalent of the required course.) This status is only granted by the organizational unit (or its designee) that created the original requirement. For example, if a region creates a required safe driving course, the region can grant an equivalency for this course. If PPS Administration creates a mandatory course for all PPS staff, the regions cannot grant an equivalency to this course; only PPS Administration may. Likewise, an equivalency can only be granted by agency leadership for agency mandated courses.

Event Status – Another term for Registration Status. See Registration Status for more information.

Exempted (X) – A registration status given to a person to exempt that person from the requirement of taking a given course. This status is assigned very rarely and only granted by the organizational unit (or its designee) that created the original requirement. For example, if a region creates a required safe driving course, the region can grant an exemption to an individual for this course. If PPS Administration creates a mandatory course for all PPS staff, the regions

cannot grant an exempted status to this course; only PPS Administration may. Likewise, agency mandated courses may only be exempted by agency leadership.

Extended Leave – A status assigned to an employee who is absent from the workplace long term due to a medical condition, military duties, etc. A person on extended leave will be given an inactivation date until they return to employment.

Finished (F) – A registration status given to a person who completed all requirements of a class.

Group – A set of learners with the same training needs or job responsibilities.

Hold (H) – Registration status which is not currently used.

Inactivate – To change a record from an Active status to an Inactive status.

Inactive Person – A person record status in Pathlore which does not allow the person to access Pathlore or the Training Center or participate in training events offered through Pathlore.

Incomplete (I) – A registration status given to a person who attended the class but did not complete all requirements of the class.

Individual Instruction – Training provided at a one on one individual level.

Info Tab – A tab within Courses or Classes. It is a location for entering descriptive information regarding the course or class. This location includes sections for entering the Purpose, Course Description, Objectives, Prerequisites, Competencies, Target Audience, Notes, or access information. See Appendix for more information on the Info Tab sections.

In Progress (P) – A registration status given to a person who has started an online course but has not yet completed the course.

Instructor-led Training – A generic term for any training in which a person leads or facilitates a training. It may include Blended Learning, Conference, Classroom Instruction, Online Virtual Classroom, Teleconference, Video Conference or Webinars.

LMS –Acronym for Learning Management System.

Locator Number – The Locator Number of a class is located to the far right on the first line, when you open the ID Data tab of a class. It is a 10-digit number. When the same class is offered multiple times on the same day (Ex: One in the morning and one in the afternoon), a Locator Number will be required to run certain reports.

Misc (M) – Registration status which is not currently used.

No Show (N) – A registration status given to a person who was enrolled in the class but did not attend the class and did not cancel prior to the start of class.

Notes tab – A section of various Pathlore records where freeform information can be added. Notes tabs are included under Class, Course and Person records.

Online Training – Training done through the Training Center.

Online Video – Videos watched through the Training Center.

Pre-requisite – A requirement which must be met in advance of a class.

Progress (P) – A registration status given to a person who began a class and is currently in progress in a class.

Question (Q) – Registration status which is not currently used.

Recorder (R) – Allows a person, who will record the training, to hold a spot in a class but is not counted as a participant.

Registration – The process of assigning a registration status to a person in a class.

Registration Status – The status assigned to a person in a class which indicates the relationship of the person to the class.

B – Bill

C – Cancelled

E – Enrolled

F – Finished

I – Incomplete

N – No Show

P – In Progress

R – Recorder

S – Started in a class, but finished in another

T – Trainer/Leader

U – Unmastered

V – Equivalent

W – Wait Listed

X - Exempted

Do Not Use: H – Hold; M – Miscellaneous; Q – Question/Unknown

Replace – To remove the original registration status and substitute a new one in its place.

Roster – A list of people registered in a class.

Self-Instructional – A learner acquires new skills independently to complete a task.

Self-Paced Training – A generic term for any training in which the person is in control of the timing and the pace of the training. It may include Computer Based Training, Self-Instruction or Web Based Training.

Self-Registration – The ability for a person to enroll themselves in a class by way of the Training Center.

Session – A specific meeting of a class that occurs on a certain date at a certain time, such as 9 am – 5 pm on 1/1/2002. If a class is scheduled to meet every day for a week it would have five sessions (if designed to have sessions).

Sign-In Sheet – A document listing people enrolled in a class with provisions for the person to sign or initial indicating they attended the class. Also used by the instructor to indicate if the person completed the training.

Simulation Training – Face-to-face trainings using simulations as a training method. They allow workers to experience dynamic and complex situations while practicing appropriate responses that improve their work performance.

Teleconference – A conference where participants from various locations are linked by telecommunication devices.

Temporarily Exempt - This designation is used to exempt a person from the requirement of taking all mandatory courses. “Temporarily Exempt” is designed to identify a person who will be physically out of the office for an **extended** period and therefore will not be able to take courses during this time. Temporarily Exempt is an “all or nothing” designation. If a person is made Temporarily Exempt, he or she is exempt from all courses.

Trainer/Leader (T) – A registration status given to the trainer or leader of a class. There is sometimes a desire to list the trainer in the roster of a class. This status allows the trainer to be listed in the roster without taking up an allotted seat in the class.

Training – A general term referring to the process of imparting knowledge and skills to people or the body of the knowledge and skills being imparted. Courses and classes are subdivisions of this body.

Training Center – An online portal through which people may access their training records, view information about courses and classes, enroll in instructor led classes, take online courses, or perform various other training related activities.

Unmastered (U) – A registration status given to a person who has completed an online course but did not receive a passing score for the required quiz.

Video Conference – A conference between participants at different sites by using computer networks to transmit audio and video data.

Wait Listed (W) – A registration status given to a person who wishes to attend the class when the allotted seats in a class are already taken. If an enrolled person cancels out of the class leaving a vacant seat, the waitlisted person can then be given the vacant seat by changing the person registration status from “Wait Listed” (W) to “Enrolled” (E). (This change in status does not automatically notify the participant of the change).

Web Based Training (WBT) – This is an instruction delivered over the internet and communicates with Pathlore to track a person’s progress and completion of the training. Also referred to as online training or e-learning.

Webinar – Presentation, lecture, workshop or seminar that is presented over the Web via video conferencing software that gives the ability to receive and discuss information in real-time.

Getting Started: Pathlore Navigation

Administration Center

The purpose of the Administration Center's design is to help you navigate the daily activities of training administration and training history tracking. Through the Administration Center, you can administer a wide variety of training and development activities.

Administration Center functions include but are not limited to the following:

- Creating courses and classes
- Creating person records
- Registering people in classes

Signing on to the Administration Center

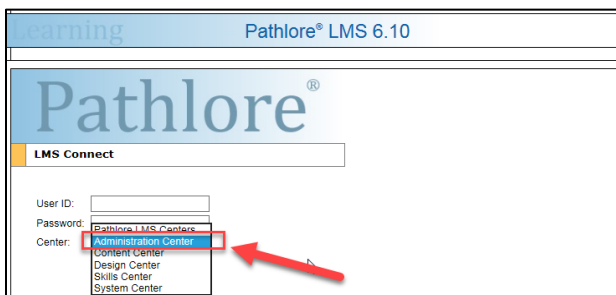
In the address bar of your web browser, type in the URL <http://learning.srs.ks.gov/lms/>. The LMS Connect page will be displayed and will allow you to access the Administration Center.



The Administration Center home page will display. In the User ID and Password boxes, enter your logon information provided to you.



Use the dropdown menu for Center. Choose Administration Center.



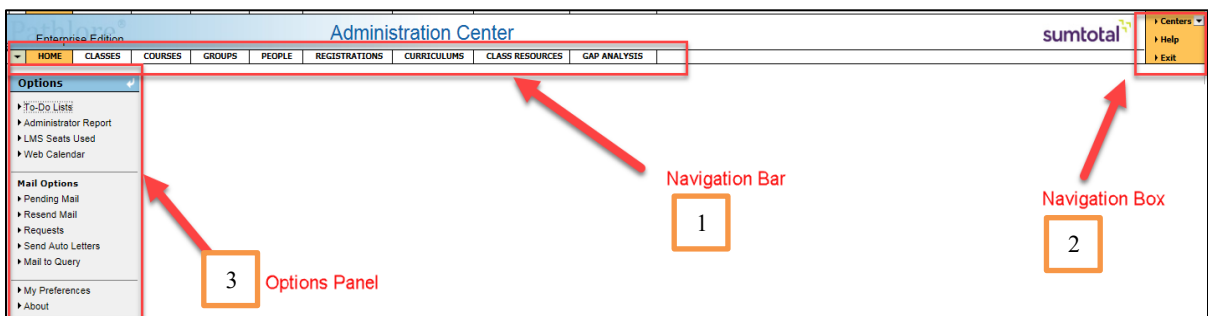
Click the “Connect” button to access the Administration Center.



Navigating in the Administration Center

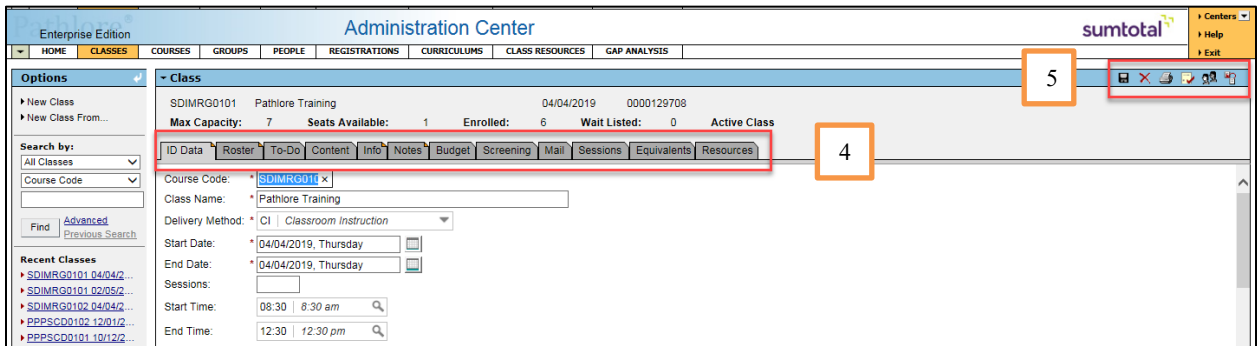
The Administration Center can be used for many distinct functions.

1. The Navigation Bar lists distinct functional areas (Classes, Courses, Groups, etc.) within the Administration Center.
2. The Navigation Box contains links to other Centers, Help and Exit.
3. The Options Panel is the vertical area on the left side of the window and below the Navigation Bar. This lists the available options for the activity selected in the navigation bar. Click the Options Panel arrow to contract and expand the panel.



4. After choosing one of the functional areas in the Navigation bar, you will see tabs specific to that functional area.

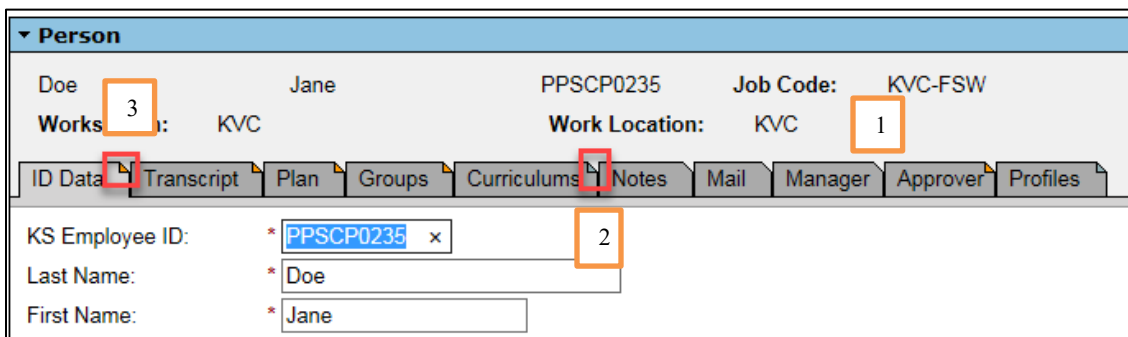
- Also, within the specific functional areas, once they are opened, you will find a toolbar (upper right-hand corner) which contains options for commonly used tasks such as Save, Delete, Print.



Identifying Folders Containing Data

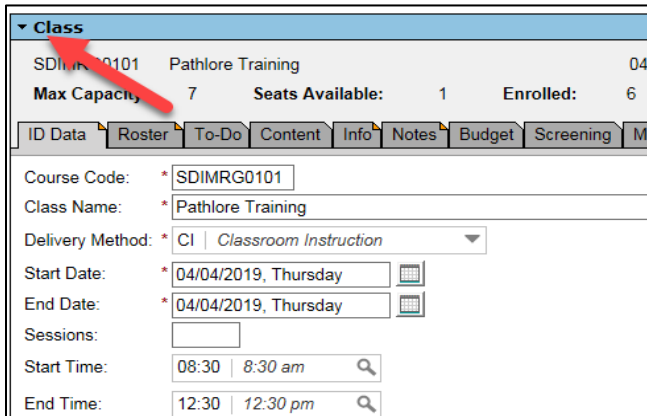
After opening a functional area, such as People, folders within that function are visible. The folders may appear to have folded corners, with various color coding, or they may have no “dog-ears.” Those dog-ears represent the following:

- No dog-ear: folder does **not** contain data.
- Aqua dog-ear: present only when you are working with Person data. The content in this folder are system generated.
- Orange dog-ear: folder does contain data.

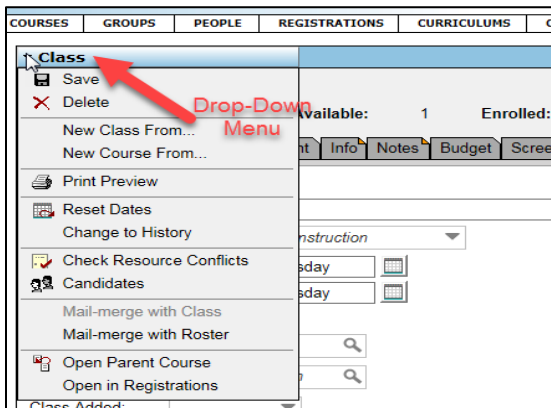


Drop-Down Menus

A down-down menu is available for each functional area. It lists commonly used tasks for that functional area.

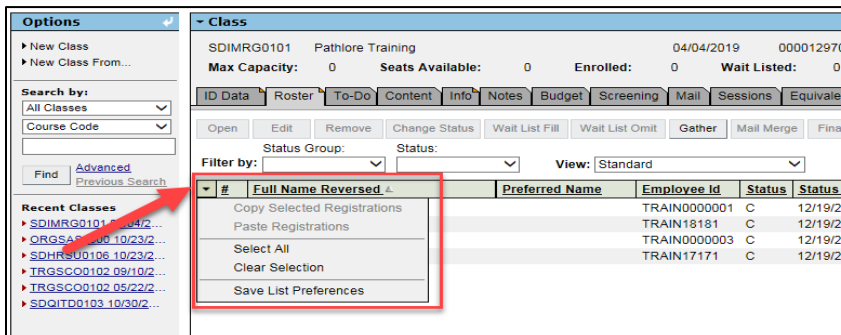


Once you expand the drop-down menu, you can view available functions.



Edit Menu

The Edit Menu is a drop-down list to the far left of the header row. Use this menu to perform operations (such as Copy and Paste) on currently selected records in the list.



Pathlore Administrator Manual

Section 1
People

People

This section provides information on how to effectively create and manage people. Person (people) records can be active or inactive. An inactive person is no longer part of the active training population (e.g. a retired, terminated employee or on temporary leave).

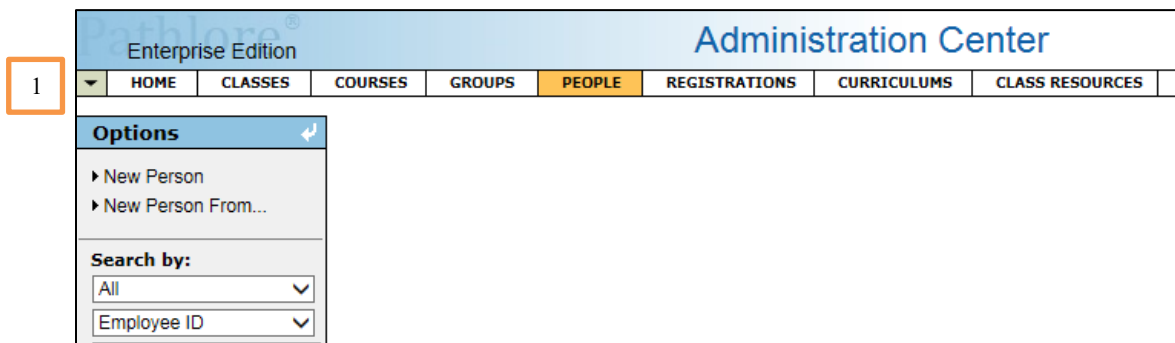
Every person in Pathlore is defined with a unique key: Employee ID. Before entering a person into Pathlore you need to ensure the person is not in the Pathlore system, by searching for previous records in Pathlore.

It is very important to do a thorough search so duplicate records are not created.

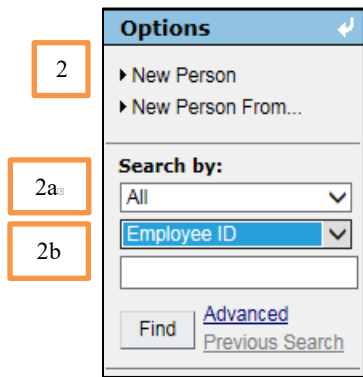
Searching for a Person in Pathlore

Before adding a new person to Pathlore, the person records should be searched diligently for a pre-existing person record, to ensure they are not already in the Pathlore system. It may be necessary to search for a person using multiple search criteria as they may have been previously entered in Pathlore with a different last name, associated with a different agency, or used a nick name versus legal name. Be thorough in your search so duplicate records are not created.

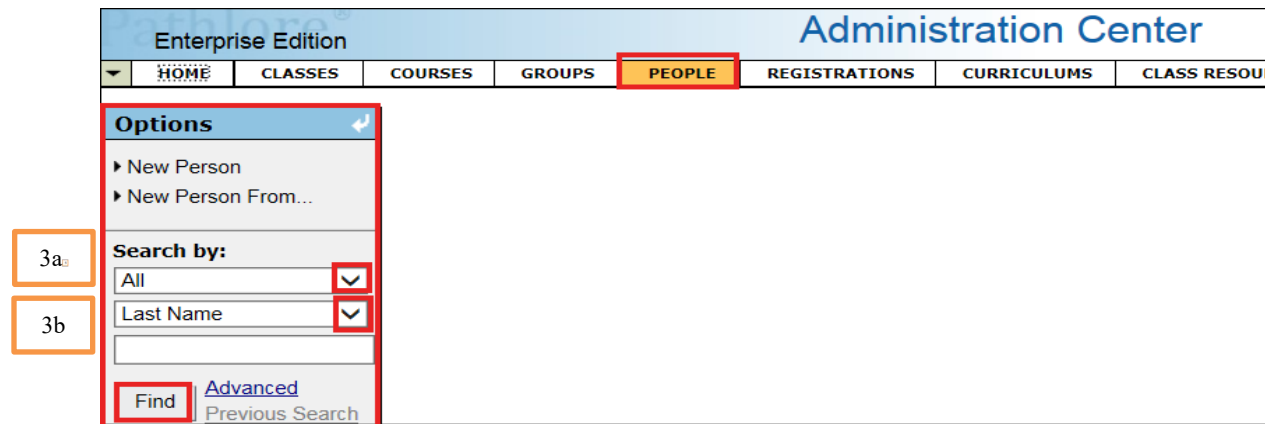
1. Select People from the Navigation Bar.



2. Options Panel
 - a. Within the Options Panel **Search by**: Choose All in the first drop-down. This will include both active and inactive people in Pathlore.
 - b. In the second drop-down choose Employee ID. Your first search should be performed using Employee ID as this is a unique key. Enter the employee's id you have been provided and search to make sure it is not already in the system. This will save you time. If that unique ID is already in Pathlore, it will not let you duplicate it.

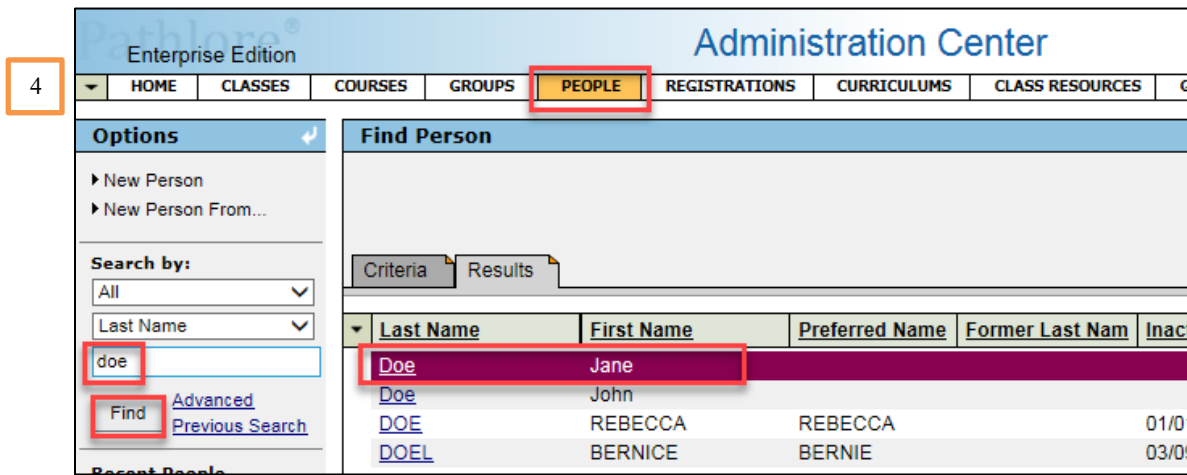


3. Once you have established the Employee ID does not already exist in Pathlore, you may search using other information available to you. As an example, we will use Search by Last Name.
 - a. In the Options box, **Search by:** select the search criteria of ‘All’ persons in the first drop-down. By selecting “All” you will be reviewing both active and inactive people in Pathlore.
 - b. Choose the ‘Last Name’ field from the second drop-down. Enter the person’s Last Name and select **Find**.



4. Scroll thru the names to be sure the person is not already in the system.

Note: If the person is not found using the Last Name, perform additional searches by using the former Last Name, if known, or another unique identifying factor. If you find a record which appears to be the same person, contact them to confirm any prior employment or other information to determine if a person found in Pathlore is the same person.

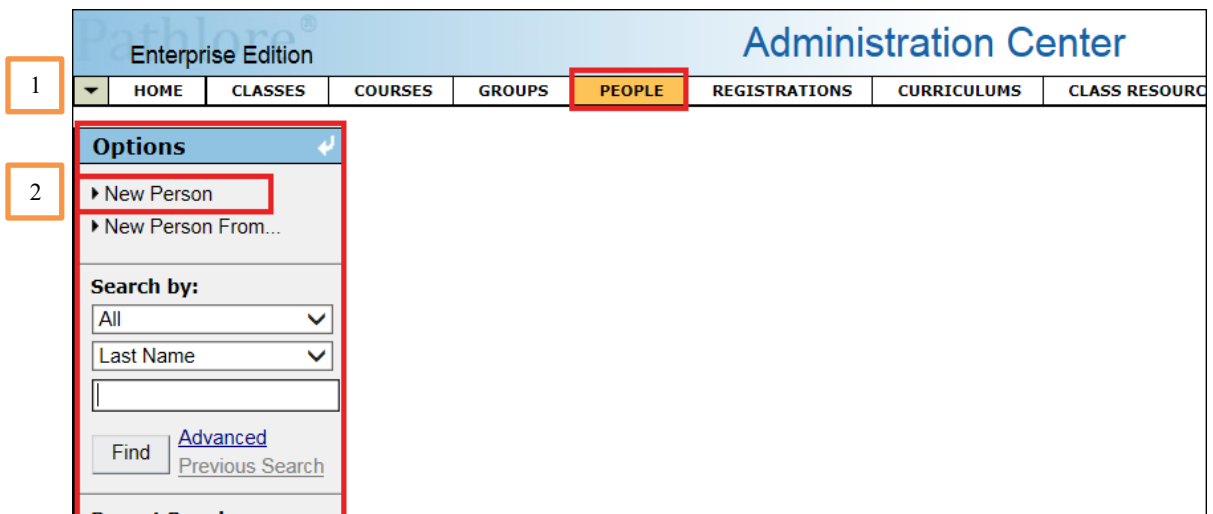


5. If an existing record is found in Pathlore, contact LMS support by calling 785-296-4327 or emailing DCF.LMSsupport@ks.gov. They can reassign the person record to you so you may update the record. Should you suspect the person is already in Pathlore, **DO NOT** create a duplicate record, wait for Pathlore support response.

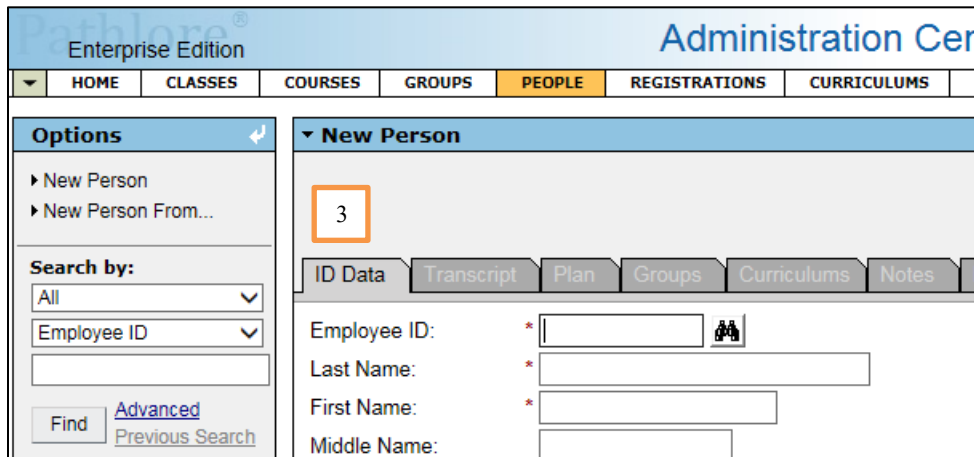
Adding a New Person to the Pathlore Database

Once you have determined the person is not in the Pathlore system, you may enter the new person into Pathlore.

1. Select **People** from the Navigation Bar.
2. From **Options** panel, select **New Person**.



- The **New Person** screen will open in the **ID Data** tab.



The screenshot shows the Pathlore Administration Center interface. The top navigation bar includes 'HOME', 'CLASSES', 'COURSES', 'GROUPS', 'PEOPLE', 'REGISTRATIONS', and 'CURRICULUMS'. The 'PEOPLE' tab is active. On the left, there is an 'Options' sidebar with 'New Person' selected. The main area is titled 'New Person' and has several tabs: 'ID Data', 'Transcript', 'Plan', 'Groups', 'Curriculum', and 'Notes'. The 'ID Data' tab is active, displaying the following fields:

- Employee ID: * [3] [AA]
- Last Name: *
- First Name: *
- Middle Name:

Please note: Fields with an * are required fields.

ID Data tab

- Employee ID** – is a unique value for each person in Pathlore.

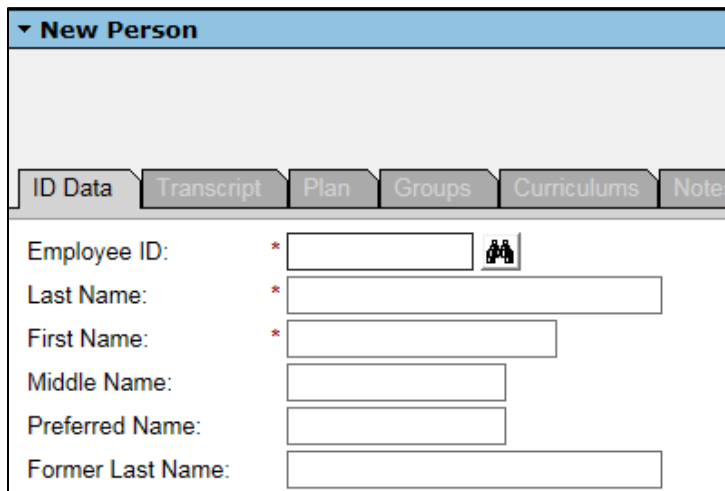
NOTE: You should only enter people if they are a State of Kansas employee from DCF, KDOR, LSH, KNI, OSH or Parsons. Or if they are a contracted Case Management Provider. All other people should be entered by LMS support.


- **State of Kansas employees** - If the person is a current State of Kansas employee from DCF, KDOR, LSH, OSH, Parsons, or KNI, enter the employee's Kansas Employee ID number. If the person is a new State of Kansas employee and has not been assigned an KS Employee ID number, see entering a temporary Employee ID number in the appendix.
 - **DCF CMP Contract staff** - If the person is an employee of one of the contracted case management providers who use Pathlore, enter an employee id in the format agreed upon by DCF.
 - **Non DCF Employees** - Any person who is not a DCF CMP Contract Staff or a State Employee (listed above) is considered a non-DCF employee. Requests should be made to DCF.LMSsupport@ks.gov to enter these people into Pathlore. The decision whether to add such people to Pathlore concerns issues of seat usage and contractual costs. There may be alternate ways to provide training to such persons outside of Pathlore.

If you do not have an Employee ID for the person, refer to Temporary ID assignment in the Appendix. A new person record with a temporary ID should not be created as a standard operating procedure; it is an exceptional case that can often be avoided. Records with temporary

IDs should not be created merely to get the person in Pathlore as employees should not be accessing trainings until they are onboard (i. e., before their official start date).

- **Last Name** - enter employee's last name.
- **First Name** - enter employee's first name. Use the person's legal name. If the person goes by a preferred name, enter that in the Preferred Name field not in the First Name field.
- **Middle Name** - enter employee's middle name or middle initial. Although this is an optional field, having this information may be very beneficial for future searches or identifying people with common names. It is suggested you enter any information you have.
- **Preferred Name** – If the person has a preferred name enter it here (e.g. Robert prefers Bob. Bob would be the Preferred Name and Robert the First Name).
- **Former Last Name** - enter employee's former last name(s) if applicable. This is helpful for history purposes and when searching to see if a person has previous records under a previous name. If there are multiple former last names, separate them with a comma.



| New Person | |
|-------------------|--|
| ID Data | Transcript |
| Plan | Groups |
| Curriculums | Notes |
| Employee ID: | * <input type="text"/>  |
| Last Name: | * <input type="text"/> |
| First Name: | * <input type="text"/> |
| Middle Name: | <input type="text"/> |
| Preferred Name: | <input type="text"/> |
| Former Last Name: | <input type="text"/> |


- **Agency** - from the look-up table, select the correct Agency. If the person is not a state employee (DCF, KDOR, LSH, KNI, OSH or Parsons) or a DCF CMP provider, contact DCF.LMSsupport@ks.gov. Agency is a required field.
- **Region/Division** – from the look-up table, select the correct region/division. Use the drop-down list to choose a region/division. Only enter those State Employees or DCF CMP providers referenced above. LMS support will enter the information on all persons who are outside of these agencies.
- **Work Station** - from the look-up table, select the correct work station. Although this is not a required field, some reports use this field for data collection.

- **Work Location** - from the look-up table, select the work location. If the location is not available, manually enter the name of the organization for which the person works.
- **Work Address** – use the look-up table to select the work location address or manually enter the address.
- **Work City, State, Zip** - use the look-up table to select the city or manually enter the city, State and Zip Code in which the person works.
- **Building** - enter the name of the building in which the person works (if applicable)
- **County** – select from the drop-down list the county in which the person works.

| | | |
|------------------------|---|----------------------|
| Agency: | * | <input type="text"/> |
| Region / Division: | * | <input type="text"/> |
| Workstation: | | <input type="text"/> |
| Work Location: | | <input type="text"/> |
| Work Address: | | <input type="text"/> |
| Work City, State, Zip: | | <input type="text"/> |
| Building: | | <input type="text"/> |
| County: | | <input type="text"/> |









- **Employee E-mail** - enter the employee's email address. This is a mandatory field. Be sure you are entering the email address correctly as many functions within Pathlore use the email address to communicate with the person or send automatic notifications. If the person does not yet have an email address, enter a 'unknown@ks.gov' in the field. It is the Pathlore Administrators responsibility to update the employee E-mail when it becomes available.
- **Supervisor E-Mail** - enter the employee's supervisors email address. This is a mandatory field. Be sure you are entering the email address correctly as many functions within Pathlore use the email address to communicate with the supervisor or send automatic notifications. If the supervisor's email address is unknown, enter a 'unknown@ks.gov' in the field. It is the Pathlore Administrators responsibility to update the supervisor's E-mail when it becomes available.
- **Supervisory Status** – this field denotes if the person is a supervisor or non-supervisor. From the look-up table, select the appropriate status. Although this is not a required field it is very important you enter a status here as training or data may use this field to define parameters.
- **Supervisor Start Date** – If you indicated the person is a supervisor, enter date person began supervising in their current position. If they are non-supervisor, leave this field blank.

- **Telephone** - enter phone number of the person (optional).
- **Extension** - enter the extension of the person (optional).

| | | |
|------------------------|---|--|
| Employee E-mail: | * | <input type="text"/> |
| Supervisor E-mail: | * | <input type="text"/> |
| Supervisor Status: | | <input type="text"/>  |
| Supervisor Start Date: | | <input type="text"/>  |
| Telephone: | | <input type="text"/> / - <input type="text"/> |
| Extension: | | <input type="text"/> |

- **Working Job Title**- enter the employee's working title here. Example: the employee may have an assigned job class of Public Service Executive, but their working title is a Program Administrator. In this example you would enter Program Administrator in this field.
- **State Employment Date** – enter the date the person began State employment, if known. Use the format MM/DD/YYYY. You may use the calendar icon to choose the date.
- **Agency Start Date** - enter the date the person began with the Agency. You may enter it manually using the format MM/DD/YYYY or select the date using the calendar icon. The Agency date does not change if the person is changing positions within the same agency. If a former employee returns and has had a break in service of more than one year, the Agency Start Date should be updated to the most recent date. If less than one year leave the original date. This field is used to assign due dates for mandatory training. (e.g. HIPAA, Sexual Harassment, etc.)
- **Job Class Code**- from the drop-down list enter the job class code of the employee.
- **Job Class Start Date** - enter the date the person began in the above listed Job Class Code using the format MM/DD/YYYY or use the calendar icon to select the date.
- **Position Number** - enter the employee's agency position number.
- **Position Start Date** - enter the date the employee started in this current position, using the format MM/DD/YYYY or use the calendar icon to select the date.
- **Department Code** - from the look-up table, select the department code. The department code field is only for CMP contract staff. The department code may sometimes be used to assign mandatory training or pull data so entering this code is important.
- **Dept Start Date** - enter the date the employee started in the department listed in the Department Code. Use the format MM/DD/YYYY or use the calendar icon to select the date.
- **Program** – enter the program in which the person works.

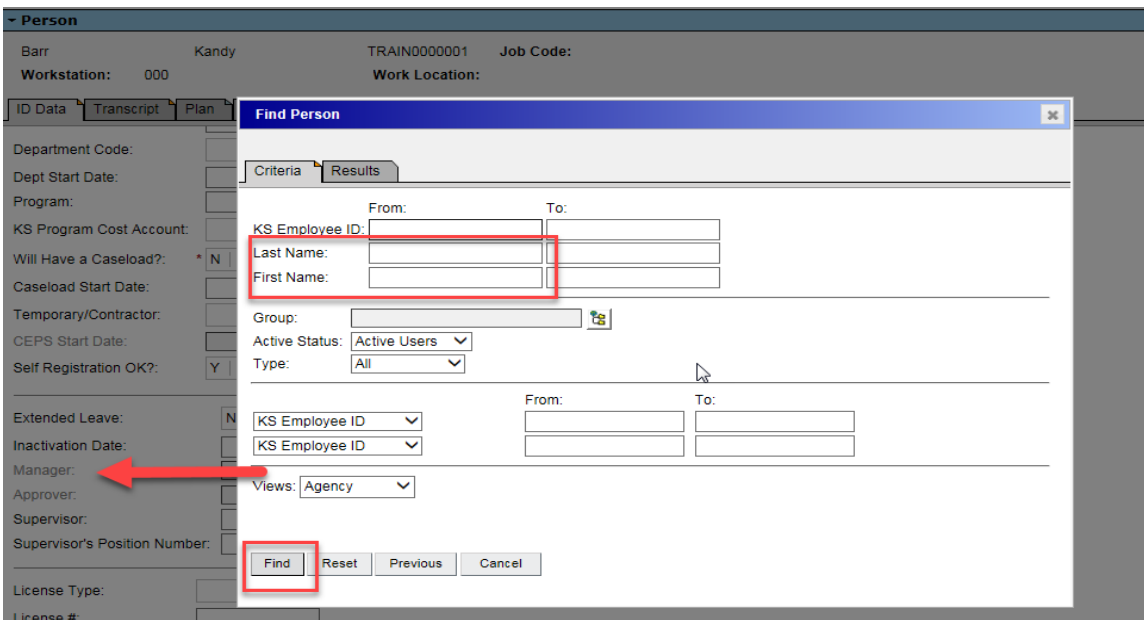
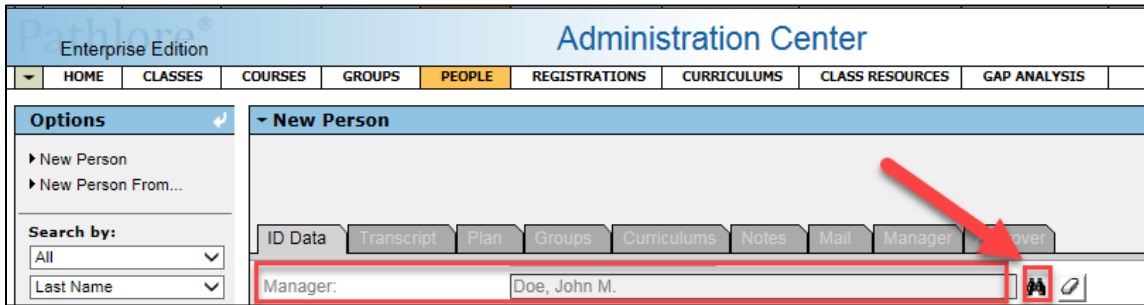
- **Program Account Code-** if the person is a state employee, enter the Cost Account under which this position is funded.
- **Temporary/Contractor** –if the staff is a temporary employee or contracted staff (other than a CMP) choose one of these options, otherwise leave it blank.
- **Self-Registration OK?** – This field defaults to Yes. If you wish for the employee to access on-line trainings through a Training Center and/or to self-enroll in classroom instructor-led trainings offered, you will leave this field set to ‘Y’ (yes). If you have an employee you do not want to self-enroll in trainings or access online training, set this field to No.

| | |
|------------------------|--|
| Working Job Title: | <input type="text"/> |
| State Employment Date: | <input type="text"/>  |
| Agency Start Date: | <input type="text"/>  |
| Job Class Code: | <input type="text"/>  |
| Job Class Start Date: | <input type="text"/>  |
| Position Number: | <input type="text"/> |
| Position Start Date: | <input type="text"/>  |
| Department Code: | <input type="text"/>  |
| Dept Start Date: | <input type="text"/>  |
| Program: | <input type="text"/> |
| Program Account Code: | <input type="text"/>  |
| Temporary/Contractor: | <input type="text"/> |
| Self Registration OK?: | <input type="text"/> |

- **Inactivation Date** - enter the date the employee left the Agency. Use the format MM/DD/YYYY or use the calendar icon to select the date. As Pathlore Administrator, you should be entering an inactivation date for staff who have terminated employment. Additionally, this field is used during the Temporary ID process (see the appendix for Assigning Temp IDs).

| | |
|--------------------|--|
| Inactivation Date: | <input type="text"/>  |
| Manager: | <input type="text"/> |

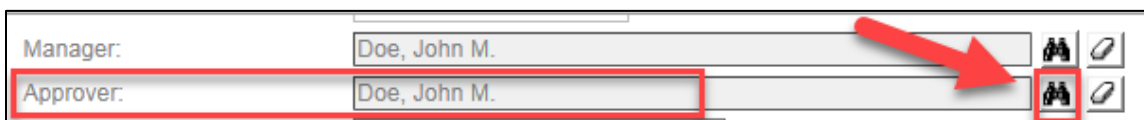
- **Manager** – The supervisor of this person should be entered as the Manager. To search for the name of the supervisor, select the binoculars, enter the appropriate criteria in the find person pop-up screen and select Find at the bottom left of the pop-up box.



To delete a manager's name from this field, select the eraser.



- **Approver** – The approver is the person who can approve a person's enrollment in classes which require approval to enroll. In most cases the approver will be the person's supervisor, but a different person can be entered if desired (ie, a Pathlore Administrator). To search use the same process as with the Manager.

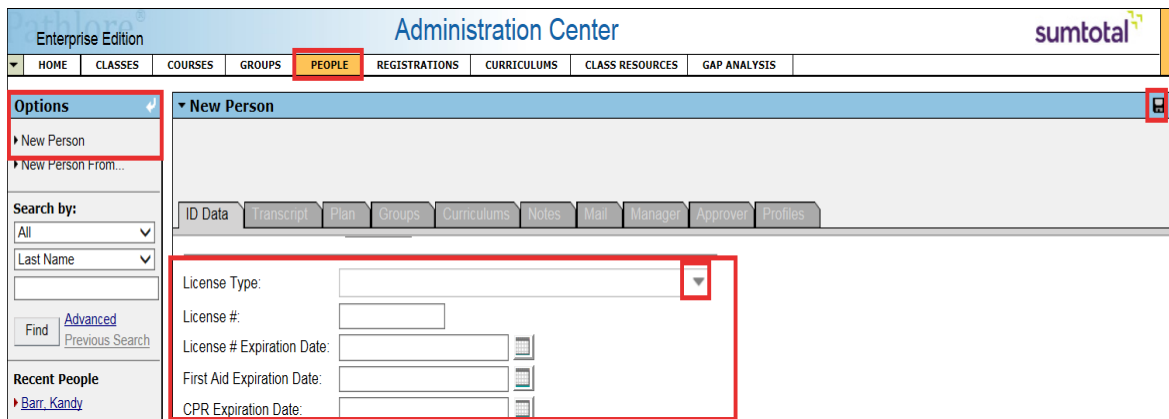


- **Supervisor** – enter the name of the employee's supervisor using the format: Last name, First Name.

- **Supervisor’s Position Number** –This field is only used for state employees and is filled in during the import process.

| | |
|-------------------------------|----------------------|
| Supervisor: | <input type="text"/> |
| Supervisor’s Position Number: | <input type="text"/> |

- **License Type** - select a license type from dropdown (if applicable). If the license type is not in the drop down, you may manually enter it.
- **License #** - enter the license number (if applicable).
- **License # Expiration Date** - enter the expiration date of the current licensing period using the format MM/DD/YYYY or use the calendar icon to select a date.
- **First Aid Expiration Date** - enter the expiration date of the current first aide licensing period using the format MM/DD/YYYY or use the calendar icon to select a date.
- **CPR Expiration Date** - enter the expiration date of the current CPR licensing using the format MM/DD/YYYY or use the calendar icon to select the date.



The screenshot shows the Pathlore Administration Center interface. The 'PEOPLE' tab is selected. The 'New Person' form is open, showing fields for License Type (a dropdown menu), License #, License # Expiration Date, First Aid Expiration Date, and CPR Expiration Date. The 'License Type' dropdown is highlighted with a red box.

The remaining fields are automatically updated through Pathlore. You will not enter a value in these fields:

- **Updated by:** Person who last entered or updated a person record and saved the record.
 - **SYSADMIN**- is noted in this field when a record is update through an import
- **Date last update:** This date recorded each time record is updated.
- **Import Date:** date is entered by Pathlore if information was received from an import.

| | |
|-------------------|---|
| Updated By: | <input type="text" value="WGRIFFITHS"/> |
| date last update: | <input type="text" value="07/26/2019, Friday"/> |
| import date: | <input type="text"/> |

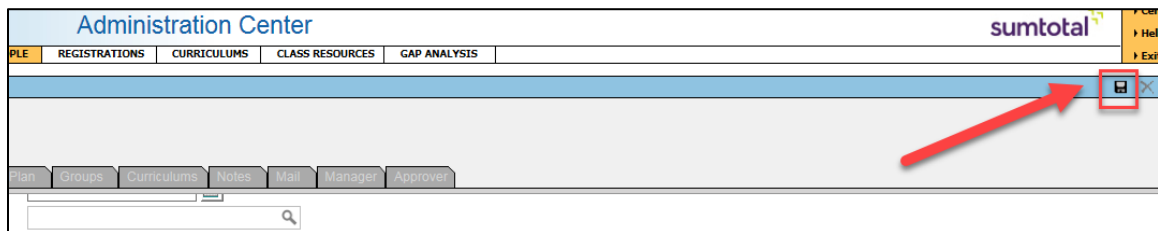
Please review all fields for accuracy, making sure that you have filled out all the required information and verified all information. Pathlore Administrators are responsible to update the Employee and Supervisor emails as well as Agency start date as these fields are not updated in an import.

At any time, you obtain additional information or receive updates on a person, you should go back and enter the information as you receive it. It is important to maintain accurate and up to date information. This provides for accuracy and functionality in the Pathlore system.

Once you have double checked all the information that you entered, you must save your work.

To save:

- Select the **Save** icon in the **upper right corner**.



Reminder: You should only enter people if they are a State of Kansas employee from DCF, KDOR, LSH, KNI, OSH or Parsons. Or if they are a contracted Case Management Provider. All other people should be entered by LMS Support. Contact LMS Support via email at DCF.LMSSupport@ks.gov or by phone at 785-296-4327.

NOTE: If your agency does a regular **import** of their employees into Pathlore, and you are creating a new person or updating a person, you will only need to complete the following fields:

- Employee ID
- First and Last Name
- Agency
- Region/Division
- Employee E-mail
- Supervisor E-mail
- Agency Start Date

Pathlore Administrator Manual

**Section 2
Courses**

Working with Courses

The Course Code is a naming convention used as a link between a course and any class created from that course. You will use the Course Code field to assign a code to a course or class. Course code allows you to organize courses and classes according to a scheme that makes sense for organizing and administering training, as well as for collecting some data.

All classes with the same course code, created from that course, initially contain the data of the course on which they are based. A course that is used to create a class is the parent course of the class. Data copied from a course to a class serves as a starting point. Information may be changed at the class level and thus becomes unique to the class.

Courses are Templates for Classes

A course can be used as a model or a template for a class. Setting up a course and then creating classes from that course can save you time and creates uniformity. For example, if you repeatedly offer the same class, you can set-up a course that defines:

- Name
- Purpose or Description
- Objectives
- Competencies
- Completion requirements
- Prerequisites
- Resources (such as a room or instructor)

When a class is made from a course, course data is copied to the class. You may then customize properties and information for a specific class as necessary.

Generations of a Course

A generation is a “snapshot” of a course record showing what certain folders contained on a specific date. You can keep generations for reference and historical purposes. See “Course Generations” later in this section for more information.

Course Coding Dictionary

The following Course Coding dictionary is the naming convention used by Pathlore. By using the naming convention, it will be easier for you to locate courses. Each course has a unique course code. Pathlore prevents you from creating courses with the exact same course code. Course coding is used for all courses and classes.

Pathlore course numbers are ten digits long. They consist of six groups as designated in the following example: SDIMRG0101



Coding Categories

There are six coding groups

| | | |
|---------|------------------|-----------------------|
| Group 1 | Responsible Unit | Alpha characters only |
| Group 2 | General Category | Alpha characters only |
| Group 3 | Sub-Category | Alpha characters only |
| Group 4 | Local Use | Alpha or Numeric |
| Group 5 | Level Number | Numeric only |
| Group 6 | Specific Number | Numeric only |

Alpha Groups

Group 1: Responsible Unit

The first group identifies the unit responsible for the course and uses only alpha characters. The responsible unit defines who originated the course or, if the training was developed by an outside source the unit sponsoring the training. It does not have to equate to the unit doing the training. For example, *Pathlore Training* was developed by Strategic Development. Therefore, the responsible unit is **SD** for Strategic Development. For example: In the course code **SDIMRG0101**, **SD** is the Responsible Unit code for the course on Pathlore Training.

Codes for the Responsible Unit are as follows:

| Code | Agency |
|------|--|
| AS | Administrative Services |
| AU | Audits |
| CN | General Conferences/Seminars not sponsored by a single organizational unit |
| CS | Child Support Enforcement |
| DI | Diversity |
| EE | Economic & Employment Services (EES) |
| ER | East Region |
| HP | Health Policy Authority |
| HR | Human Resource Management |
| IT | Information Technology Services |
| KC | Kansas City Region |
| KE | KEES |
| KN | Kansas Neurological Institute |
| KVC | KVC Behavioral Healthcare |
| LS | Larned State Hospital |
| OF | Office of the Secretary |
| OR | Osawatomie State Hospital/Rainbow Mental Health |
| PP | Prevention & Protection (formerly CF for Children & Family) |
| PR | Personnel Services |
| PS | Parsons State Hospital |
| RS | Rehabilitation Services |
| RV | Kansas Department of Revenue |
| SD | Strategic Development (formerly OD for Organizational Development) |
| SF | Saint Francis Ministries |
| WI | Wichita Region |
| WR | West Region |

Group 2: General Category

The second group of the course code identifies the general category and is only alpha characters. The general category indicates the broad type of training or to whom the training would be applicable. In the example SDIMRG0101, **IM** is the General Category-Information Management.

Codes for the General Category are as follows:

| Code | General Category | Definition of Category |
|-----------|---------------------------|---|
| ES | Environmental Safety | Activities which promote a safe environment |
| GS | General Skill Development | Improves the employee's ability to function in the work environment and/or improves productivity |
| HR | Human Resources | Agency and/or specific organizational unit policies, procedures, or activities related to human resources policies and procedures |
| IM | Information Management | Manual or automated activities related to the access, collection, storage and analysis of data/information |
| MD | Medical | Activities related to health maintenance and/or remediation |
| OP | Organizational Procedures | Policies and procedures governing the functioning of the organization (non-human resource policies and procedures) |
| QI | Quality Improvement | Involves individual or team activities focused on improving work processes and/or facilitating organizational change |
| PS | Program Specific | Initial and/or on-going education related to major program function(s) or Agency and/or specific organizational unit |
| SF | Support Functions | Initial and/or on-going education related to a specific position that supports the delivery of major program functions |

Group 3: Sub-Categories (of General Categories)

The third group of the course code identifies the sub-category of training for the General Category. These are only alpha characters. In our example, SDIMRG0101, RG (Pathlore System) is a sub-category of IM (see IM in the tables below). If there is not a sub-category under the general category that meets your needs, contact Strategic Development at DCF.LMSsupport@ks.gov.

Here are the Sub-Categories for each of the General Categories in Pathlore.

Environmental Safety (ES)

| Code | Sub-Category |
|------|------------------------|
| EP | Emergency Preparedness |
| EQ | High Risk Equipment |
| HM | Hazardous Material |
| IC | Infection Control |
| MN | MANDT |
| OR | Orientation |
| RM | Risk Management |
| SS | Safety & Security |
| UM | Utilities Management |

General Skill Development (GS)

| Code | Sub-Category |
|------|---------------------------------|
| AS | Assessments |
| CO | Communications (verbal/written) |
| CR | Customer-Relations |
| SI | Self-Improvement |

Human Resources (HR)

| Code | Sub-Category |
|------|----------------------------------|
| CP | Certification Programs |
| CR | EEO/Civil Rights |
| CO | Communications |
| OR | Orientation |
| PP | Policies & Procedures |
| PS | Personnel (How to hire/motivate) |
| SD | Staff Development |
| SU | Supervisory/Management Training |

Information Management & Technology (IM)

| Code | Sub-Category |
|------|-----------------------|
| AV | Audio/Video Equipment |
| CL | Computer Literacy |
| CO | Communications |
| DB | Database Software |
| EM | Email Software |
| GR | Graphics |
| IN | Internet |
| LW | LAN/WAN |
| OS | Operating System |
| PL | Programming Languages |
| PS | Program Specific |
| RG | Pathlore System |
| SE | Information Security |
| SH | Sharp System |
| SP | Spreadsheet Software |
| TC | Telecommunications |
| WP | Word Processing |

Medical (MD)

| Code | Sub-Category |
|-------------|-----------------------------|
| AD | Anxiety Disorders |
| CP | Certificate Programs |
| CS | Clinical Skills |
| DT | Dental |
| ER | Emergency Response |
| GR | Gerontology/LTC |
| HP | Health Promotion |
| HS | Habilitative Services |
| MD | Mood Disorders |
| OP | Other Psychiatric Disorders |
| OR | Orientation |
| RX | Pharmacology |
| PD | Personality Disorders |
| PH | Physical Health |
| TD | Thought Disorders |

Organizational Procedures (OP)

| Code | Sub-Category |
|-------------|---------------------|
| AD | Administrative |
| OR | Orientation |
| SE | Security |

Program Specific (PS)

| Code | Sub-Category |
|-------------|--------------------------------|
| AP | Adult Protective Service |
| AU | Audits |
| CC | Child Care |
| CD | Chemical Dependency |
| CS | Child Support Enforcement |
| CW | Child Welfare |
| DD | Developmental Disabilities |
| DI | Diversity |
| EE | Economic & Employment Services |
| EP | Employment Preparation |
| FA | Family Assistance |
| HR | Human Resources |
| HS | Habilitative Services |
| HT | Human Trafficking |
| LE | Legal/Ethics |
| MH | Mental Health |
| NU | Nursing |
| OR | Orientation |
| PL | Personalized Lifestyle |
| VR | Vocational Rehabilitation |

Quality Improvement (QI)

| Code | Sub-Category |
|------|-------------------------|
| AD | Administrative |
| OR | Orientation |
| PI | Performance Improvement |
| QM | Quality Management |
| TD | Team Development |

Support Functions (SF)

| Code | Sub-Category |
|------|----------------------------------|
| AD | AM w/disabilities Accommodations |
| BS | Business Services |
| CS | Custodial Services |
| FS | Food Services |
| MN | Maintenance & Repairs |
| OR | Orientation |
| OS | Office Services |
| SE | Security |
| VM | Vehicle Maintenance & Repair |

Group 4: Local Use Number

The Local Use Number can be alpha or numeric and is Group 4 in the naming convention. It can be used by the responsible unit to provide any additional categorization needs of the unit. For example, if the course is a training for trainers, the local use number could be “T” SDIMRGT101; the “T” denotes training for trainers. If no additional clarification is needed, the local use number will be zero. In the example, SDIMRG0101 the first ‘0’ is the local use number.

Group 5: Level Number

The Level Number identifies the relative ranking of the courses within each sub-category and is assigned a numeric value. The number represents the level of difficulty for the course or if there may be a prerequisite(s). If there is a prerequisite, a course will typically have a level number higher than its required prerequisite(s). For example, the course code number for a Basic Pathlore training could be SDIMRG0101, an Advanced training's code could be SDIMRG0301.

The levels are as follows:

| | | |
|---|---|--------------|
| 0 | - | Introductory |
| 1 | - | Basic |
| 2 | - | Intermediate |
| 3 | - | Advanced |
| 4 | - | Updates |

Group 6: Specific Number

The last two numeric digits, Group 6, identify the specific course within the Group 5 level. This gives the potential to have 99 courses for each level of each unique combination alpha characters. For example: Pathlore Training could have 99 specific courses: SDIMRG0101 to SDIMRG0199.

Course Information (Example)

Course Code: SDIMRG0101

Course Name: Pathlore Training

Delivery Method: Classroom Instruction

Course Start Date: 01/01/2030 (This is the default placeholder the system uses to separate a course from a class.)

Course End Date: 01/01/2030 (The ending date is relative to the place holder start date; example -- for a two-day class the value would be 01/02/2030)

Training Facility: To Be Determined

Training City: To Be Determined

Class Size – Maximum/Minimum: 10 / 4

Contact Hours: 4

CEU Type: (enter # of hours)

Type of CEUs:

Class Owner: Strategic Development

Responsible Unit: Strategic Development

Purpose: Training provides Pathlore Administrators the basic knowledge and skills necessary to use the Learning Management System training tracking software.

Description: Training is an instructor led interactive training for new Pathlore Administrators. Participants will learn what the Pathlore Learning Management System is, how to track training received by individuals and how to produce reports concerning the training attendance.

Objectives: *Upon completion of the course, participant will:*

- Understand Pathlore is and how it is used
- Recognize how to create courses and classes
- Identify how to run pre-designed reports

Prerequisites: None

Competencies: None established at this time

Completion Requirements: Entire course

Target Audience: New Pathlore users

Instructor(s): Jane Doe

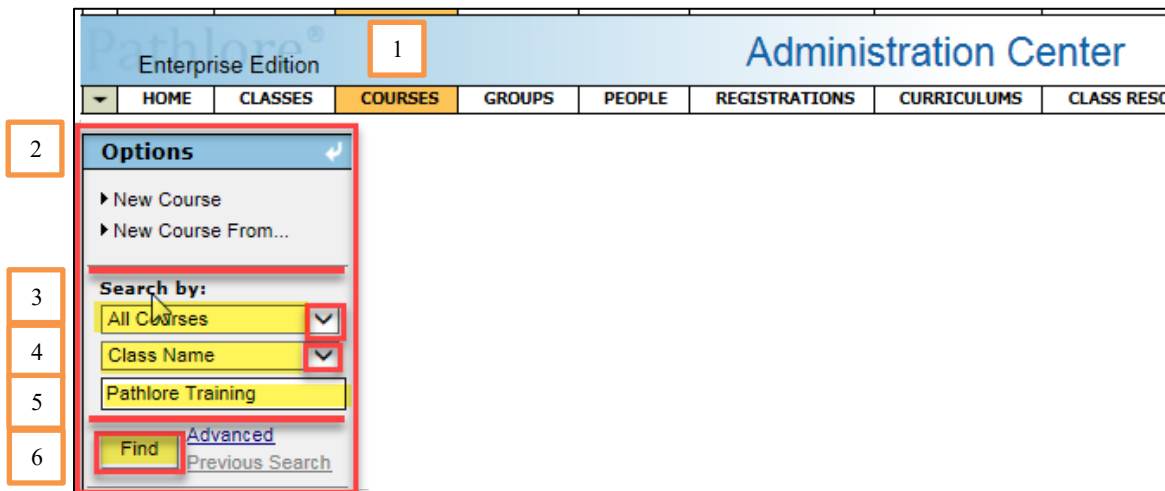
Course Notes: None

Setting Up a New Instructor-Led Course in Pathlore

A course must be set up before a class can be entered in Pathlore. The information from the Course is a template for classes. Information included in the Course defines information present in the Training Center. Not all available fields are used when setting up a course. Before setting up a new Course, search to be sure the course is not in Pathlore.

I. To Search for a Course:

1. Select **Courses** from the navigation bar.
2. Look at **Options** box on the left side of the screen and navigate to **Search by:**
3. Select **All Courses** from the first dropdown.
4. Select **Class Name** from the next dropdown.
5. Enter the name (or partial name) of the **Course/Class**.
6. Select **Find**.

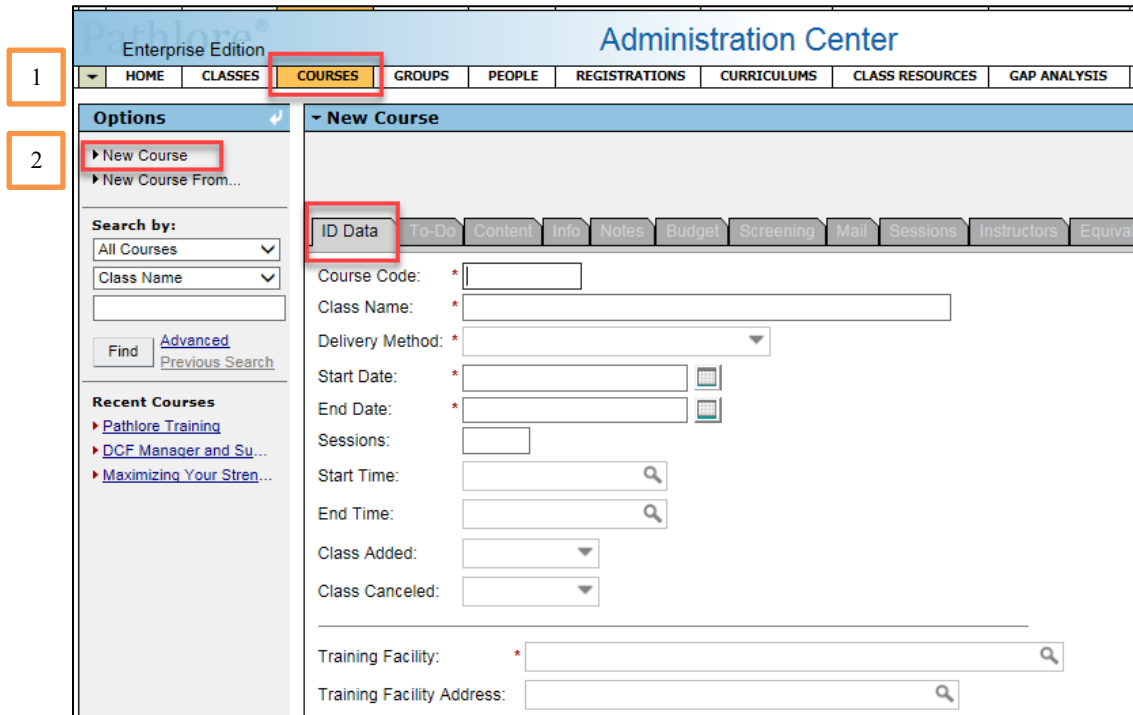


The screenshot shows the Pathlore Administration Center interface. The navigation bar at the top includes 'HOME', 'CLASSES', 'COURSES', 'GROUPS', 'PEOPLE', 'REGISTRATIONS', 'CURRICULUMS', and 'CLASS RESO'. The 'COURSES' tab is selected. On the left side, there is an 'Options' box with a search section. The search section has a 'Search by:' label and two dropdown menus. The first dropdown is set to 'All Courses' and the second is set to 'Class Name'. Below the dropdowns is a text input field containing 'Pathlore Training'. At the bottom of the search section, there is a 'Find' button and a 'Previous Search' link. The interface also shows 'Enterprise Edition' and 'Administration Center' at the top.

NOTE: If a Course by the same name is found, open the course information to determine if the information is the same and whether you will need to create a new Course using another Course Code. If the course is not in Pathlore continue as follows to set up a new course.

II. Setting up a New Course

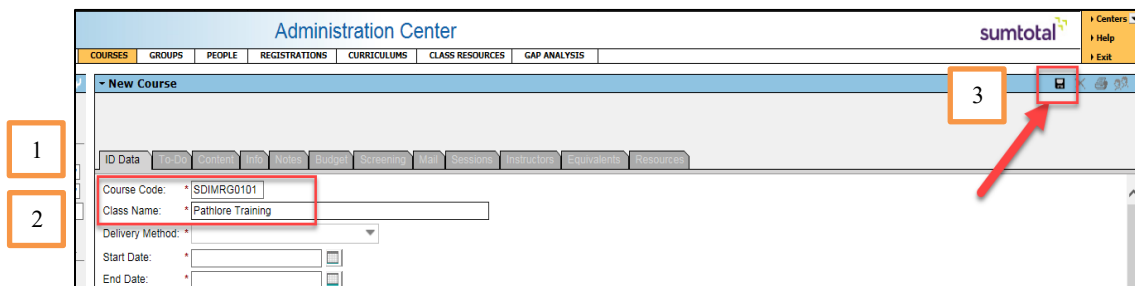
1. Select **Courses** from the Navigation bar.
2. From **Options Panel** to the left, select **New Course**. The New Course screen will open to the **ID Data** folder.



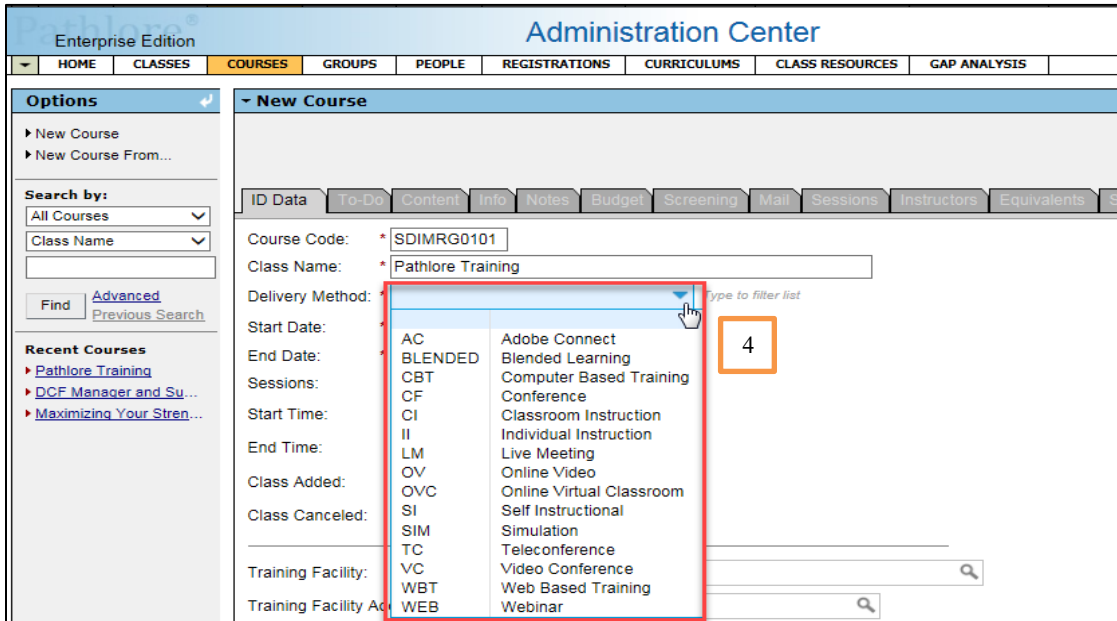
NOTE: Fields with an asterisk (*) are required fields.

A. ID Data Tab

1. **Course Code** - Enter the newly established course code. (Example: SDIMRG0101)
2. **Class Name** - enter the name of the course using capitalization rules for titles. (Example: Pathlore Training) This field allows up to 120 characters.
3. Select the **SAVE** button.

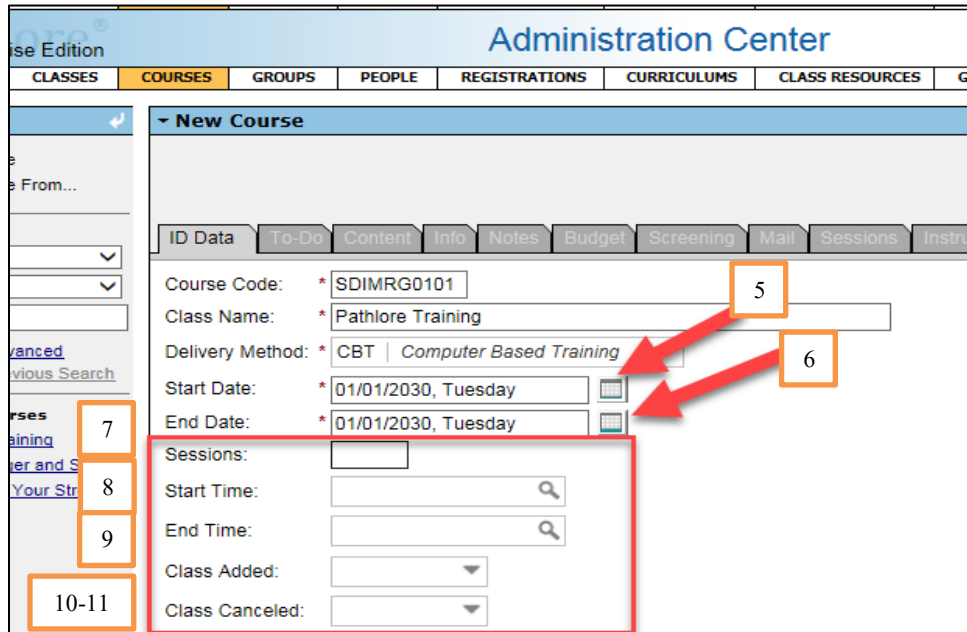


- Delivery Method** – select a delivery method using the drop-down arrow. Select the appropriate delivery method for the course. See the Terminology section for the definitions of delivery method.



- Start Date** - Enter the place holder 01/01/2030. (This is the placeholder that Pathlore uses to separate a course from a class). The start date of a course should **always** be 01/01/2030.
- End Date** - Enter the end date relative to the start date place holder. (i.e. for a 1-day training enter 01/01/2030 and for a 2-day course the end date would be 01/02/2030)
- Session** - leave this field blank as this field pertains to classes
- Start Time** - leave the start time field blank if the start time will vary for individual classes. You may enter a time here if the class will ALWAYS start at the same time.
- End Time** - leave the end time field blank if the end time will vary for individual classes. You may enter a time here if the class will ALWAYS end at the same time.
- Class Added** - leave this field blank as this field pertains to classes
- Class Canceled** - leave this field blank as this field pertains to classes

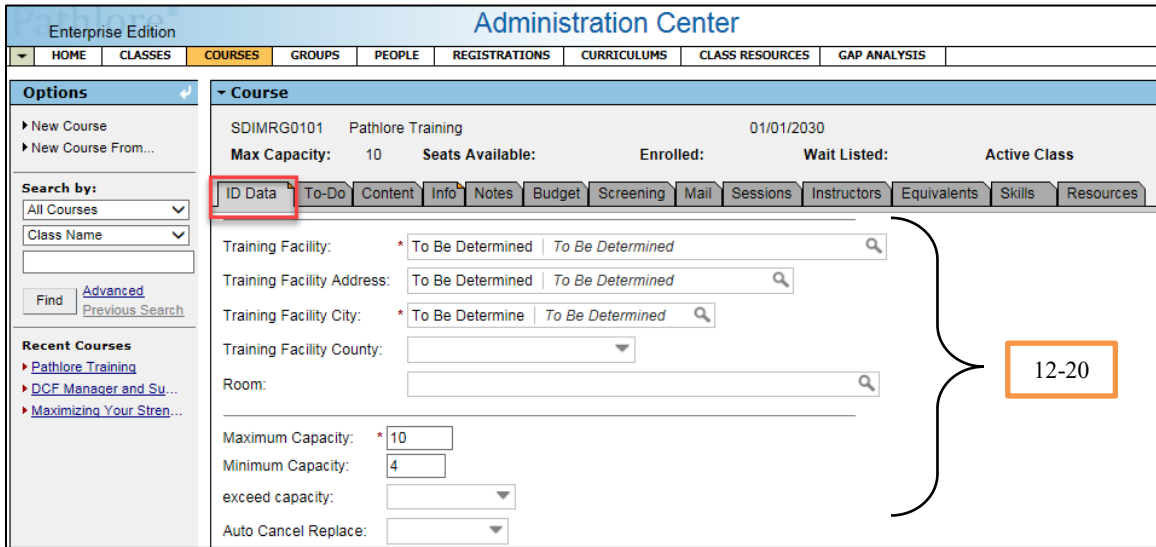
Because the following information often changes for classes, “TBD” may be used in the following fields: Training Facility, Training Facility Address, and Training Facility City.



The screenshot shows the 'Administration Center' interface for creating a new course. The 'New Course' form is displayed with the following fields and annotations:

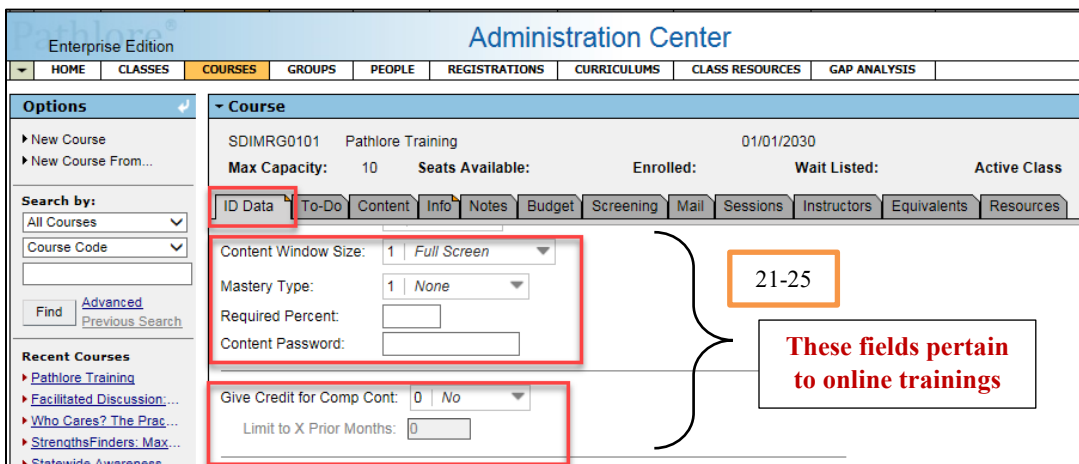
- Course Code:** * SDIMRG0101 (Annotated with box 5)
- Class Name:** * Pathlore Training (Annotated with box 5)
- Delivery Method:** * CBT | Computer Based Training (Annotated with box 6)
- Start Date:** * 01/01/2030, Tuesday (Annotated with box 6)
- End Date:** * 01/01/2030, Tuesday (Annotated with box 6)
- Sessions:** (Annotated with box 7)
- Start Time:** (Annotated with box 8)
- End Time:** (Annotated with box 9)
- Class Added:** (Annotated with box 10-11)
- Class Canceled:** (Annotated with box 10-11)

12. **Training Facility** - from the look-up table select “To Be Determined”
13. **Training Facility Address** - from the look-up table select “To Be Determined”
14. **Training Facility City** - from the look-up table select “To Be Determined”
15. **Training Facility County** – leave this blank
16. **Room** - this field can be left blank and entered when setting up a class
17. **Maximum capacity** - enter the maximum number of allowable participants
18. **Minimum capacity** - enter the minimum number of participants required for class to be held
19. **Exceed Capacity** - leave the field blank (This could be entered if you want to be able to register additional people after the class maximum is reached, without going in and changing the value in the maximum field.)
20. **Auto Cancel Replace** – this field is set to yes if you want the wait listed participants to automatically be enrolled when someone cancels out of a class. You may leave it blank in the course and set this at the class level.



- 21. **Content Window Size** - defaults to Full Screen
- 22. **Mastery Type** - defaults to **None**
- 23. **Required Percent** - leave blank
- 24. **Content Password** – leave blank
- 25. **Give Credit for Comp Cont.** defaults to 0=No and Limit to X Prior Month defaults to 0. Both these fields pertain to online trainings.

These fields pertain to online trainings

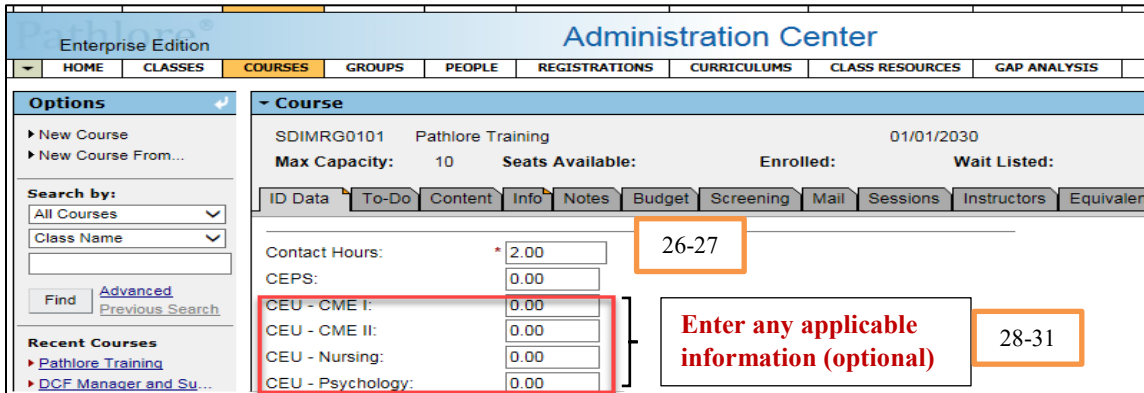


- 26. **Contact Hours** – enter the total number of hours of the actual training. Do not include time allotted for lunch. (Example – training is from 10 a.m. to 4 p.m. with a 1-hour lunch. Contact hours will be 5 hours.)
- 27. **CEPS** – leave blank. This field is not being used at this time

These fields pertain to online trainings

- 28. CEU – CME I
- 29. CEU – CME II
- 30. CEU – Nursing
- 31. CEU – Psychology

These fields represent the number of CEU hours for a course and are optional. Enter applicable information.



| | | | | | | | | |
|--|-----------------------|---|--------|--------|---------------|-------------|-----------------|--------------|
| Enterprise Edition | Administration Center | | | | | | | |
| HOME | CLASSES | COURSES | GROUPS | PEOPLE | REGISTRATIONS | CURRICULUMS | CLASS RESOURCES | GAP ANALYSIS |
| Options | | Course | | | | | | |
| <ul style="list-style-type: none"> ▶ New Course ▶ New Course From... | | SDIMRG0101 Pathlore Training 01/01/2030 Max Capacity: 10 Seats Available: Enrolled: Wait Listed: | | | | | | |
| Search by: All Courses Class Name | | ID Data To-Do Content Info Notes Budget Screening Mail Sessions Instructors Equivalen | | | | | | |
| Find Advanced Previous Search | | Contact Hours: * 2.00 CEPS: 0.00 CEU - CME I: 0.00 CEU - CME II: 0.00 CEU - Nursing: 0.00 CEU - Psychology: 0.00 | | | | | | |
| Recent Courses ▶ Pathlore Training ▶ DCF Manager and Su... | | Enter any applicable information (optional) | | | | | | |

- 32. CEU – General Social Work
- 33. CEU – Ethics Social Work
- 34. CEU – DSM Social Work
- 35. CEU – Safety Social Work

Social Work CEU fields are greyed out. Contact Strategic Development to have Social Work CEUs hours entered.

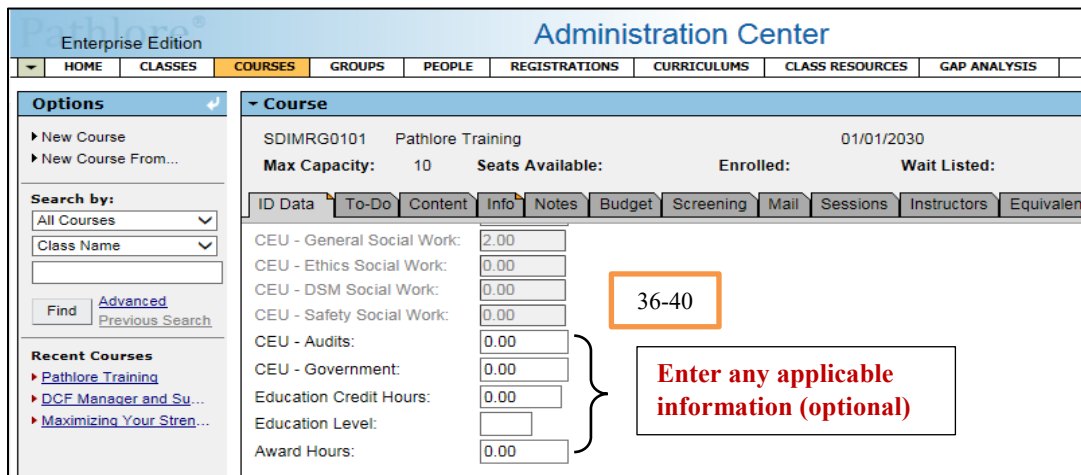
| | |
|----------------------------|------|
| CEU - General Social Work: | 0.00 |
| CEU - Ethics Social Work: | 0.00 |
| CEU - DSM Social Work: | 0.00 |
| CEU - Safety Social Work: | 0.00 |

Social Work CEU fields are greyed out. Contact Strategic Development to have Social Work CEUs hours entered.

32-35

- 36. CEU – Audits
- 37. CEU – Government
- 38. Education Credit Hours
- 39. Education Level
- 40. Award Hours

Enter any applicable information. These fields are optional.



Enterprise Edition Administration Center

HOME CLASSES COURSES GROUPS PEOPLE REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS

Options

- New Course
- New Course From...

Search by:

All Courses

Class Name

Find Advanced Previous Search

Recent Courses

- Pathlore Training
- DCF Manager and Su...
- Maximizing Your Stren...

Course

SDIMRG0101 Pathlore Training 01/01/2030

Max Capacity: 10 Seats Available: Enrolled: Wait Listed:

ID Data To-Do Content Info Notes Budget Screening Mail Sessions Instructors Equivalent

CEU - General Social Work: 2.00

CEU - Ethics Social Work: 0.00

CEU - DSM Social Work: 0.00

CEU - Safety Social Work: 0.00

CEU - Audits: 0.00

CEU - Government: 0.00

Education Credit Hours: 0.00

Education Level:

Award Hours: 0.00

36-40

Enter any applicable information (optional)

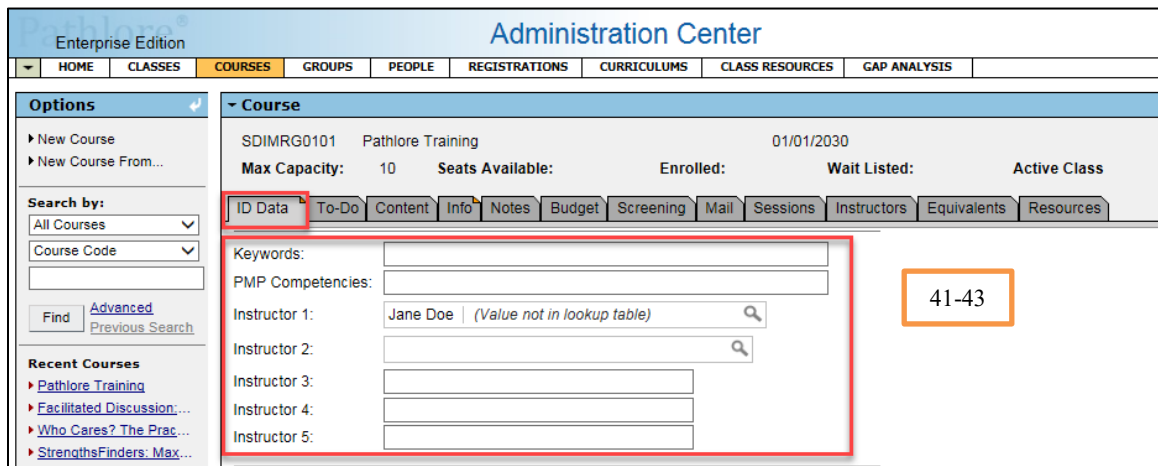
Social Work CEU's are pre-approved through a Providership with the Kansas Behavioral Sciences Regulatory Board. The courses are approved and signed off by the designated Department for Children and Families (DCF) provider. All hours within these fields can only be entered by Strategic Development. For more information on Social Work CEU's, contact Strategic Development at 785-296-8192.

41. **Keywords** – Words entered in this field are used for searches in the Training Center. You can enter words which would help a participant search for a course in the Training Center. This field is helpful if the person searching does not know the exact title of the training or if looking for content. Some examples would be “CEU”, “Social Work”, “CPR”, “Tax Policy”, etc. This field is optional. You do not need to enter any word in the title as those are searchable in the Training Center.

42. **PMP Competencies** - enter any State of Kansas PMP Competencies this course addresses.

NOTE: Enter the competencies in alphabetical order separated by a comma. Example: Accountability, Customer Service, Teamwork

43. **Instructors 1-5** – leave the Instructor fields blank. When the class is entered in Pathlore, the actual name of the instructor(s) should be entered for each class. If the training ALWAYS has the same instructor, you may enter it here.



The screenshot shows the Pathlore Administration Center interface. The top navigation bar includes 'HOME', 'CLASSES', 'COURSES', 'GROUPS', 'PEOPLE', 'REGISTRATIONS', 'CURRICULUMS', 'CLASS RESOURCES', and 'GAP ANALYSIS'. The 'COURSES' tab is active. On the left, there are 'Options' for creating new courses and a search section. The main area displays course details for 'SDIMRG0101 Pathlore Training' with a start date of '01/01/2030'. Below this, there are tabs for 'ID Data', 'To-Do', 'Content', 'Info', 'Notes', 'Budget', 'Screening', 'Mail', 'Sessions', 'Instructors', 'Equivalents', and 'Resources'. The 'ID Data' tab is selected and highlighted with a red box. It contains several form fields: 'Keywords', 'PMP Competencies', 'Instructor 1' (with a dropdown menu showing 'Jane Doe' and a search icon), 'Instructor 2', 'Instructor 3', 'Instructor 4', and 'Instructor 5'. To the right of these fields, there is a text box containing the value '41-43', which is highlighted with an orange box.

44. **Class Owner** - from the drop down select appropriate owner. The class owner is the unit or agency that developed the course.

NOTE: This field limits who can update this record. Only those Pathlore Administrators who belong to the group matching the class owner code have update rights. Others can copy a class using this template but must change the Class Owner to their Class Owner code.

45. **Unit Responsible** - from the drop down select the appropriate unit that originated the course.

NOTE: The class owner and unit responsible would be the same for a course but could be different for a class.

46. **Class Enter Date** - enter the date you are keying in the information, using MM/DD/YYYY format.

47. **Target Audience** - enter the training audience you wish to target.

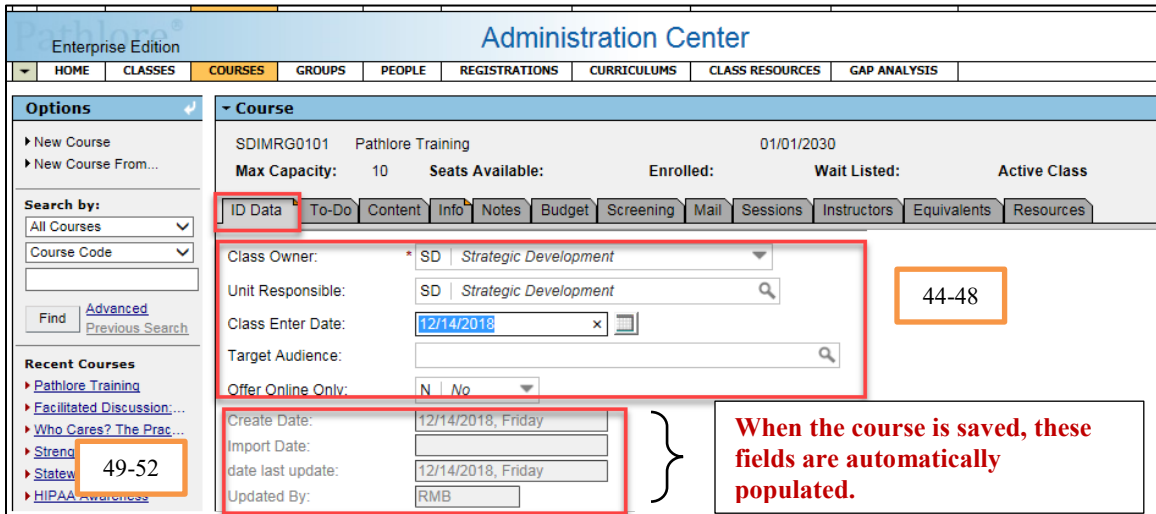
48. **Offer online Only** - defaults to 'No' for Instructor Led Training.

49. **Create Date** – Auto populates when the course is saved.

50. **Import Date** – Auto populates when the course is saved.

51. **Date last update** – Auto populates when the course is saved.

52. **Updated By** – Auto populates when the course is saved.



Enterprise Edition Administration Center

HOME CLASSES COURSES GROUPS PEOPLE REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS

Options

Course: SDIMRG0101 Pathlore Training 01/01/2030

Max Capacity: 10 Seats Available: Enrolled: Wait Listed: Active Class

ID Data To-Do Content Info Notes Budget Screening Mail Sessions Instructors Equivalents Resources

Class Owner: * SD | Strategic Development

Unit Responsible: SD | Strategic Development

Class Enter Date: 12/14/2018

Target Audience:

Offer Online Only: N | No

Create Date: 12/14/2018, Friday

Import Date:

date last update: 12/14/2018, Friday

Updated By: RMB

49-52

44-48

When the course is saved, these fields are automatically populated.

53. **Age Specific:** Adolescent

54. **Age Specific:** Adult

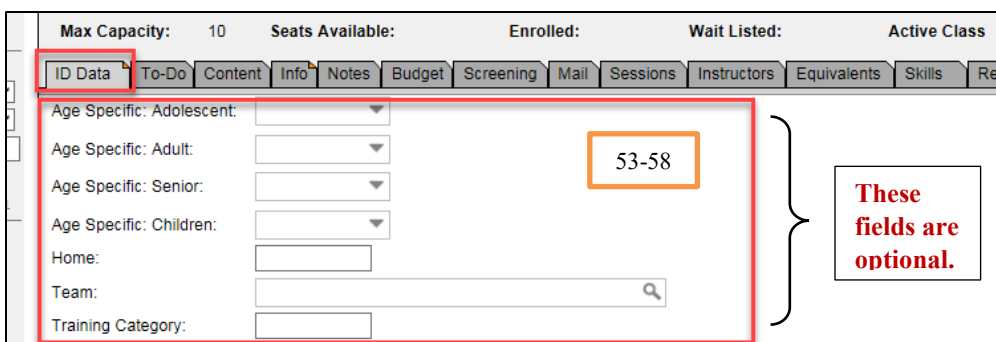
55. **Age specific:** Children

56. **Home**

57. **Team**

58. **Training Category-** the training category field may be used to categorize your trainings within your organization. This field is optional.

These fields are optional



Max Capacity: 10 Seats Available: Enrolled: Wait Listed: Active Class

ID Data To-Do Content Info Notes Budget Screening Mail Sessions Instructors Equivalents Skills Res

Age Specific: Adolescent:

Age Specific: Adult: 53-58

Age Specific: Senior:

Age Specific: Children:

Home:

Team:

Training Category:

These fields are optional.

59. **Self Reg. Must Call** – leave the field blank if self-registration is allowed.

If self-registration is not allowed, from drop down select one of the following:

- **A** - approval needed
- **I** – invitation only
- **S** – supervisors only

If one of these values is selected, a person wishing to enroll would see a message to contact a Pathlore Administrator to be enrolled.

“Please contact your local Pathlore Administrator or Training Department if you want to register in this class or change this registration.”

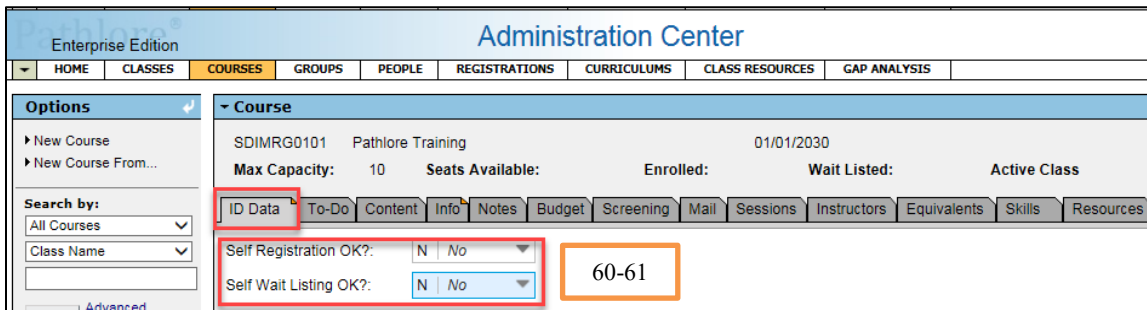
| | |
|------------------------|---|
| Self Reg. Must Call: | |
| Self Registration OK?: | A Approval Needed - Get supervisor's OK, then contact your Pathlore administrator |
| Self Wait Listing OK?: | I Invitation Only |
| | S Supervisors Only |

59

60. **Self-Registration OK?** - from the drop down select **Yes** if self-registration is allowed. Yes, will allow for staff to register for a class through the Training Center.

NOTE: This field also determines if the course is visible in the Training Center. If “Yes” is selected, the course is visible. If “No” is selected, the course is not visible.

61. **Self-Wait OK?** - from the drop down select **Yes** if people can add themselves to the wait list for a class or **No** if people are not allowed to add themselves to the wait list for a class.



Enterprise Edition Administration Center

HOME CLASSES COURSES GROUPS PEOPLE REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS

Options Course

SDIMRG0101 Pathlore Training 01/01/2030

Max Capacity: 10 Seats Available: Enrolled: Wait Listed: Active Class

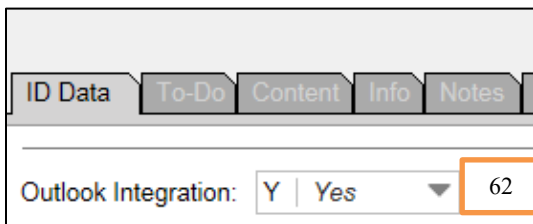
ID Data To-Do Content Info Notes Budget Screening Mail Sessions Instructors Equivalents Skills Resources

Self Registration OK?: N | No

Self Wait Listing OK?: N | No

60-61

62. **Outlook Integration-** to send a calendar appointment to anyone enrolling in a class for this course, select “Y”.

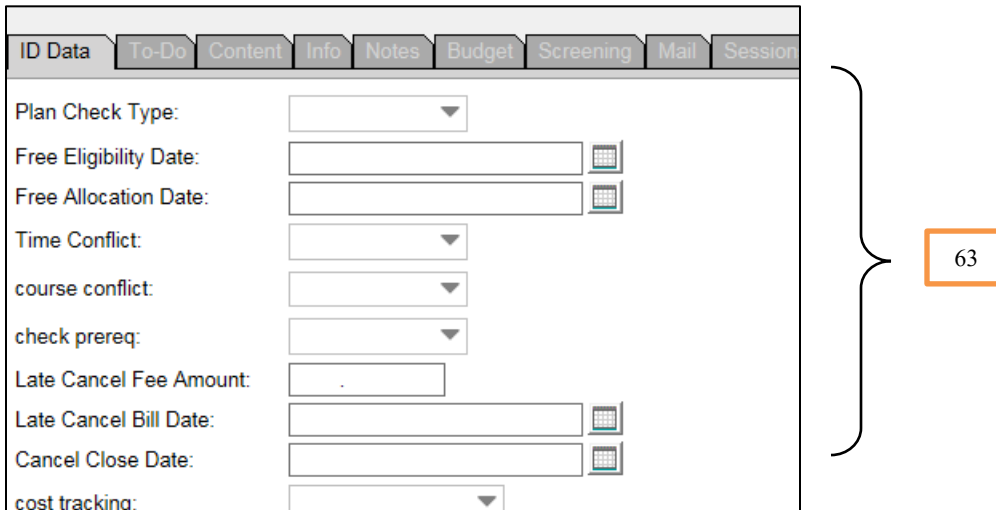


ID Data To-Do Content Info Notes

Outlook Integration: Y | Yes

62

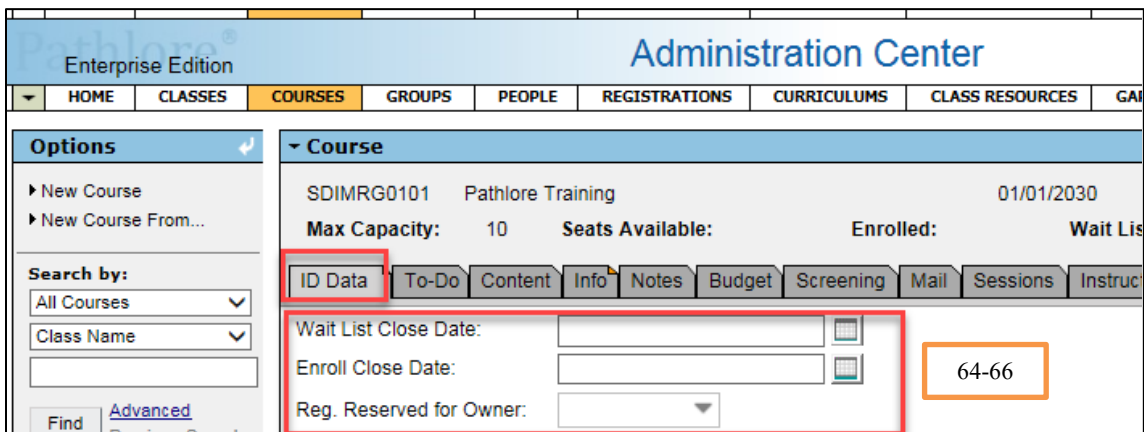
63. **Plan Check Type** through **Cost Tracking**-do not enter a value.



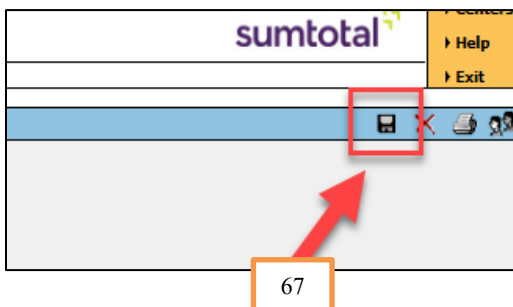
64. **Wait List Close Date** – Do not enter a date in this field. It only applies to classes.

65. **Enroll Close Date** - Do not enter a date in this field. It only applies to classes.

66. **Reg. Reserved for Owner** - select **Y**-yes if only administrators with the same course ownership profile can register participants in the class. If left blank or set to “N-no” any Pathlore administrator can add registrations to classes created from this course.



67. Select the **Save** icon in the Toolbar in the upper right-hand corner to save.



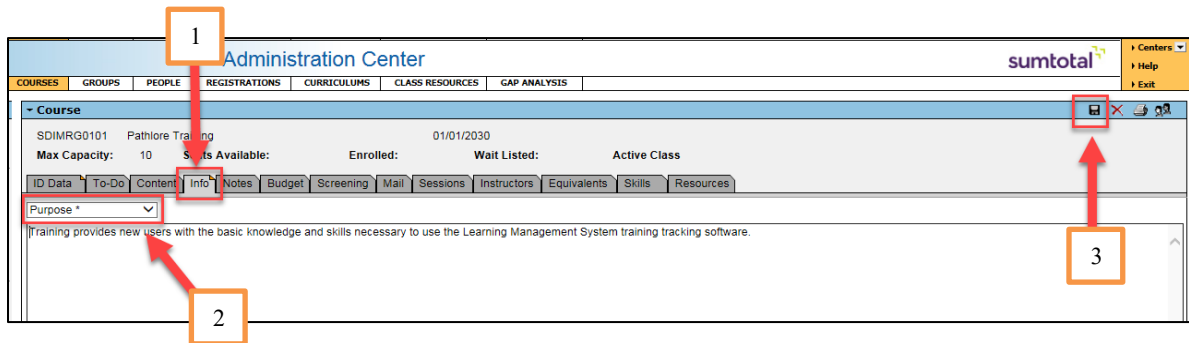
B. Information (Info Tab)

Within this tab you should add information specific to this course. Categories in this tab include Purpose, Description, Objectives, Prerequisites, Competencies, Completion Requirements, Target Audience, Instructor, Course Notes and Access Information. This information is visible in the Training Center.

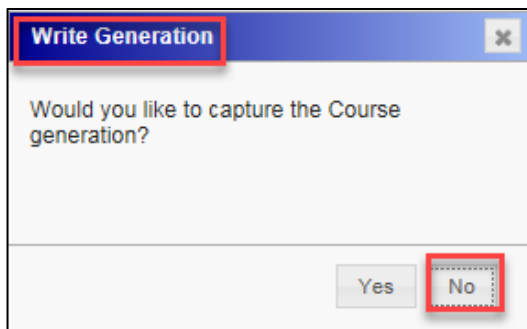
Each Information section has a distinct title and can contain up to 32,000 characters.

Note: Remember to double check spelling and punctuation in each section.

1. Select the **Info** folder.
2. From the dropdown, select **Purpose**. Key in the purpose of the training.
3. Select **Save**.

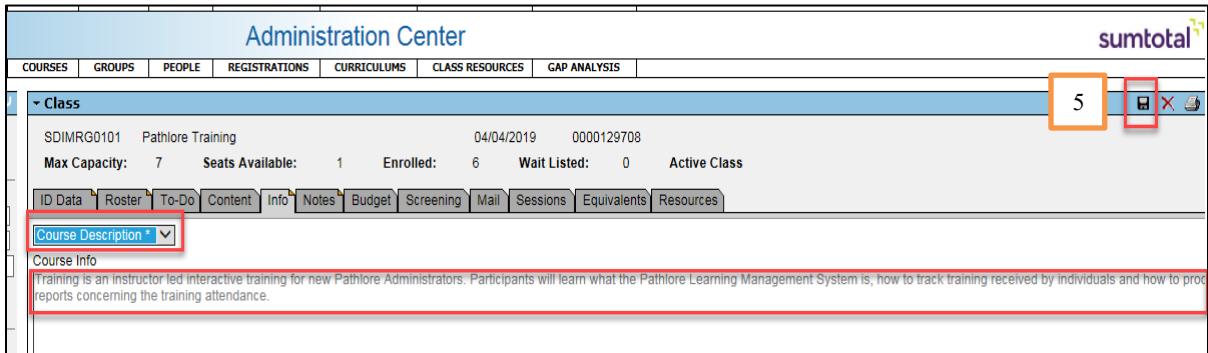


The Write Generation pop-up box will open asking - **Would you like to capture the Course generation?** When creating a new course, select “No”. If an existing course is being updated, refer to the Course Generations topic at the end of this section to answer the pop-up.

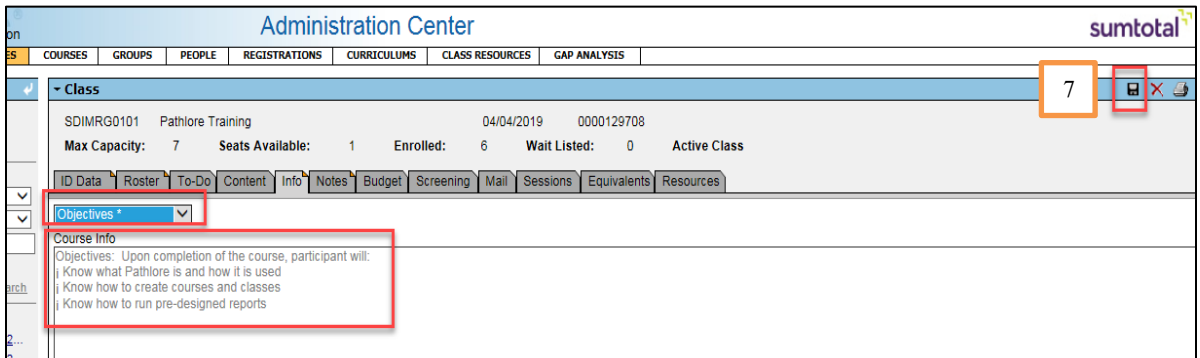


NOTE: Selecting “Yes” in the Write Generation box a second time for the same course in the same day will result in the previous generation record being overwritten.

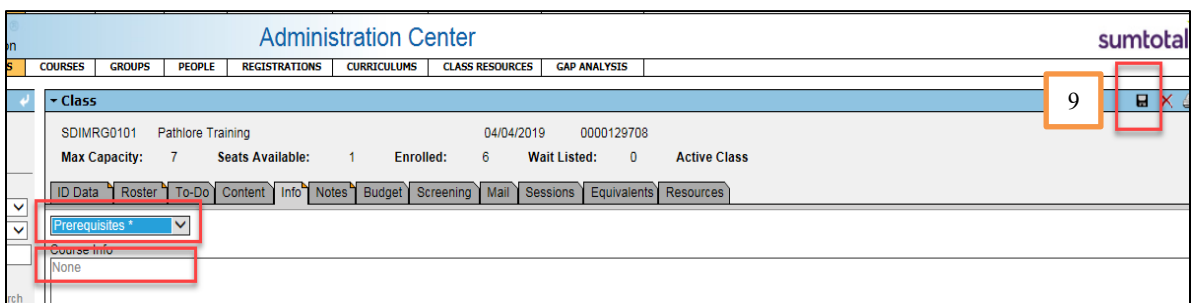
4. From the dropdown, select **Course Description**, enter the description of the course.
5. **Save** in the toolbar, upper right-hand corner. Select **NO** to “Would you like to capture the course generation?” in the Write Generation pop-up box.



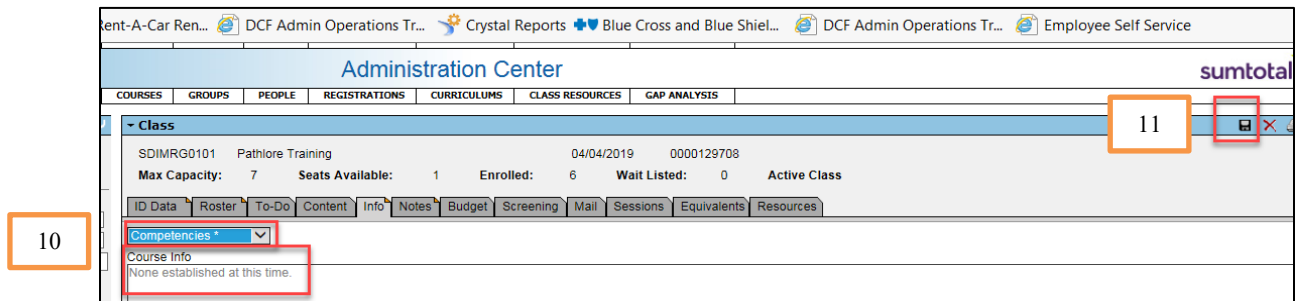
6. From the dropdown, select **Objectives**. Use the following format to enter objectives:
Upon completion of this course, participant will: then list each of the objectives.
7. **Save** in the toolbar, upper right-hand corner. Select **NO** to “Would you like to capture the course generation?” in the Write Generation pop-up box.



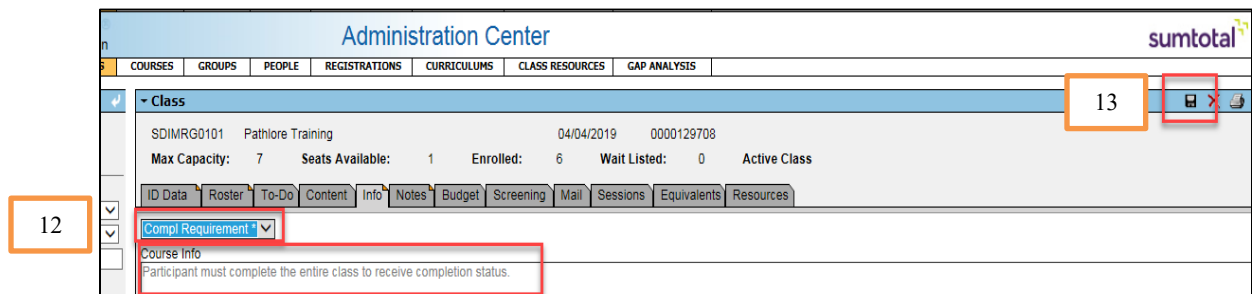
8. From the dropdown select **Prerequisites** – sometimes there may be a different training or perhaps some other type of material that must be completed before a participant can enroll in a specific class. If there is a pre-requisite to the specific course you are entering, enter the Course Code of the required prerequisites (i.e. TRGSCO0101 Training, read pamphlet How to). If there are no prerequisites enter the word “None established at this time.” Consult with Strategic Development to set up a class with a prerequisite.
9. **Save** in the toolbar, upper right-hand corner. Select **NO** to “Would you like to capture the course generation?” in the Write Generation pop-up box.



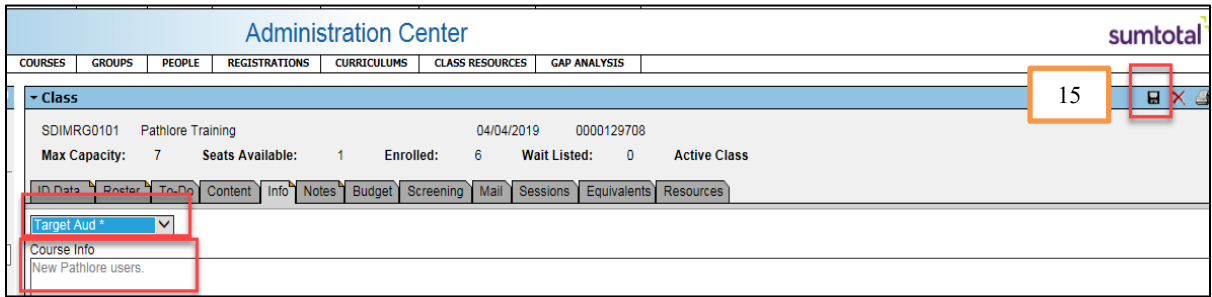
10. From the dropdown, select **Competencies**. Enter any competencies applicable to the course. If there are no competencies for this course, key in the phrase “**None established at this time.**”
11. **Save** in the toolbar, upper right-hand corner. Select **NO** to “Would you like to capture the course generation?” in the Write Generation pop-up box.



12. From the dropdown, select **Completion Requirements**. Enter the requirements necessary to complete the course. (i.e. Participant must complete the entire class to receive completion status.)
13. **Save** in the toolbar, upper right-hand corner. Select **NO** to “Would you like to capture the course generation?” in the Write Generation pop-up box.



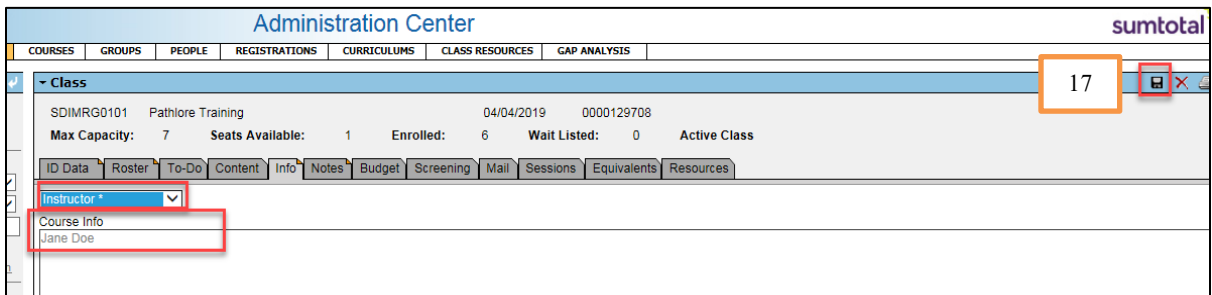
14. From the dropdown, select **Target Audience**. Enter the targeted audience for this course. (Example: All staff, New Pathlore users, or staff in the Wichita Region.)
15. **Save** in the toolbar, upper right-hand corner. Select **NO** to “Would you like to capture the course generation?” in the Write Generation pop-up box.



The screenshot shows the 'Administration Center' interface with the 'Class' tab selected. The class details for 'SDIMRG0101 Pathlore Training' are visible, including 'Max Capacity: 7', 'Seats Available: 1', 'Enrolled: 6', and 'Wait Listed: 0'. A toolbar contains various tabs like 'ID Data', 'Roster', 'To-Do', 'Content', 'Info', 'Notes', 'Budget', 'Screening', 'Mail', 'Sessions', 'Equivalents', and 'Resources'. A dropdown menu labeled 'Target Aud *' is open, showing 'Course Info' and 'New Pathlore users.' as options. A callout box with the number '14' points to the dropdown, and another callout box with the number '15' points to the save icon in the toolbar.

16. From the dropdown, select **Instructor**. Enter the name of the instructor or leave blank if unknown or if the instructor could change between the various class offerings of this course. The credentials or bio of the Instructor(s) may be included here.

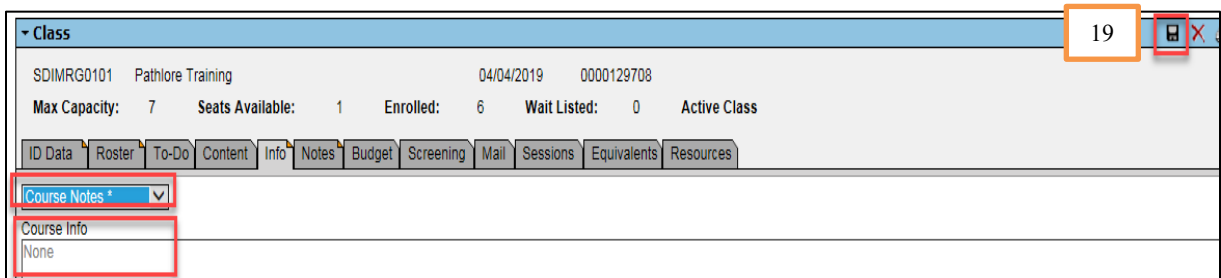
17. **Save** in the toolbar, upper right-hand corner. Select **NO** to “Would you like to capture the course generation?” in the Write Generation pop-up box.



This screenshot is similar to the previous one, but the dropdown menu is now labeled 'Instructor *' and shows 'Course Info' and 'Jane Doe' as options. A callout box with the number '16' points to the dropdown, and another callout box with the number '17' points to the save icon in the toolbar.

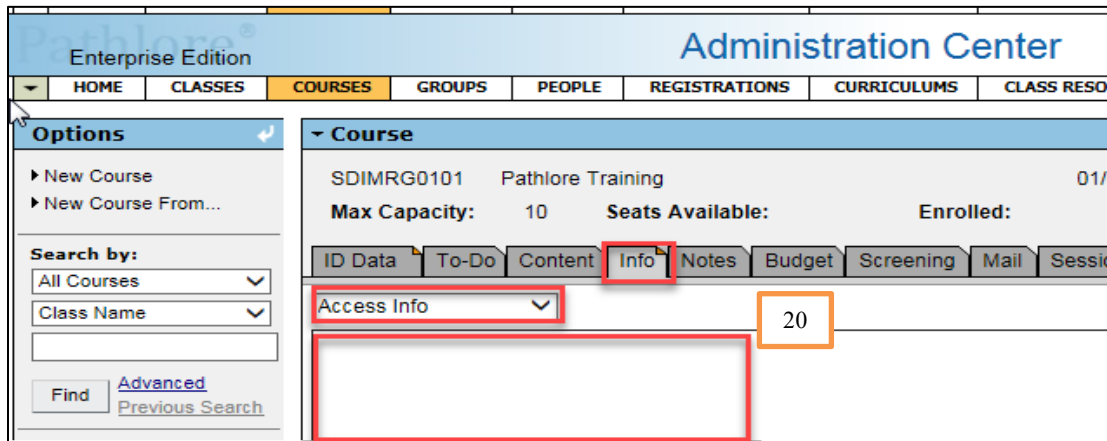
18. From the dropdown select **Course Notes**. Enter any special instructions for the participants (i.e. bring notebooks to class). If there are no notes enter the word **None**.

19. **Save** in the toolbar, upper right-hand corner. Select **NO** to “Would you like to capture the course generation?” in the Write Generation pop-up box.



This screenshot shows the 'Course Notes *' dropdown menu open, with 'Course Info' and 'None' as options. A callout box with the number '18' points to the dropdown, and another callout box with the number '19' points to the save icon in the toolbar.

20. Access Info – leave blank



The screenshot shows the Pathlore Administration Center interface. The top navigation bar includes 'HOME', 'CLASSES', 'COURSES', 'GROUPS', 'PEOPLE', 'REGISTRATIONS', 'CURRICULUMS', and 'CLASS RESO'. The 'COURSES' tab is selected. On the left, there is an 'Options' sidebar with 'New Course' and 'New Course From...' options, and a search section with 'Search by:' dropdowns for 'All Courses' and 'Class Name', and 'Find' and 'Advanced' buttons. The main area shows a course record for 'SDIMRG0101 Pathlore Training' with 'Max Capacity: 10' and 'Seats Available: 20'. The 'Info' tab is selected, and the 'Access Info' dropdown is highlighted with a red box, and the value '20' is highlighted with an orange box.

Entry of Specific Information vs. Generic Values

Enter only information that will not be changing from class to class offering of this course. Items such as objectives, purpose or competencies may be a constant for each offering of this course. Otherwise, it is best practice to enter generic values or leave fields blank when creating a course. You should enter specific values to a class when you establish a class. This will be covered in the Class Section.

Course Generations

One of the features of Pathlore is the ability to capture a ‘new’ generation of a course whenever it is updated. A course generation is a snapshot of certain course data; what the course consisted of at a specific time. From time to time, a course may require an update. For example: The number of contact hours or an objective may change, etc. Whatever the change, Pathlore can document the change by capturing the ID Data and the Info Sections as they were before the change was made.

Both online and instructor-led courses can have generations.

Minor changes to a course such as correction of typos or adding some missing information does not require a new generation. Anytime a new generation is created there should be an entry in the Notes tab concerning the change.

An entry in the Notes tabs should provide documentation of the changes made. There are two reasons to document the changes being made when creating a new generation:

- Documentation provides exact information as to what was changed.
- Even when the change is obvious, the impact and reason for the change may not be clear. For example, a reduction of contact hours from four to three does not by itself

communicate what may have been dropped from the course and why the change was made.

The entry should include:

- The date of the change (which should correlate with the date the new generation was created).
- The name of the person requesting the change (Course developer, content expert, etc.).
- The specifics of the change (fields values changed, objectives added or dropped, content added or dropped, etc.).
- The name of the Pathlore administrator who made the changes.

Example:

New generation created on 09/05/2017

Generation created at the request of Kathy Evers of Strategic Development

Number of contact hours changed from 4.0 to 3.0 hours. This was the result of dropping the small group discussion and sharing of team building scenario. Team building has been removed from the list of course objectives.

---Kenneth Morris 09/05/2017

If the training has significantly changed and is covering different training needs, a new course should be established versus creating a new generation of an existing course.

Any questions concerning creating course numbers or course generations should be directed to Strategic Development at DCF.LMSsupport@ks.gov. The telephone number is (785) 296-4327.

Creating a Course from Another Course

While Pathlore allows the option of making a new course from an existing course, ***this is not recommended***. Selecting ‘New Course’ instead of ‘New Course From’ helps prevent inaccurate data from carrying over from an established course to the new course. If a course is created via ‘New Course From’ all the information within the course you are creating from is transferred to the new course being created.

If you choose to create a new course using ‘New Course From’ template, remember that all the information in the **ID Data** fields as well as the information in the **Info** sections will copy over to the new course. Be sure to check that each field in the new course’s **ID Data** and the **Info** sections has the correct information for the new course.

Relationship Between Courses and Classes

Courses and classes use similar ID data field such as: Course Code, Start Date, End Date

| Course Versus Class Comparison | |
|---------------------------------------|--|
| Courses | Classes |
| Stored in Course Table | Stored in Class Table |
| Must have unique Course Code value | Many classes can have the same Course Code |
| All dates and times are place holders | Specific dates and times assigned for each class |
| No person registration | Person registration |
| Can have prerequisites | Use the parent and course pre-requisites, if any |
| Can have generations | Can't have generations |

Pathlore Administrator Manual

**Section 3
Classes**

Classes

A class is an LMS organizing element that defines a training event in which students can be registered. They are used to track information about planned student participation in training events, as well as information about the status of the event. Classes are a specific offering of a course. Unlike a course, a class has an actual start date and time and an associated roster of people registered for that class. Because courses are templates for classes, both use the same fields. Courses should be used to create a class.

Classes and courses have an ongoing, dynamic relationship via their *course codes*. All classes with the same course code initially contain data from the course on which they are based—whether that data was copied to the class or is “loaned” from the course. If you change the course code of a specific class, that class instantly acquires new data from its newly assigned parent course, but only data that is “loaned” such as pre-requisite and information data; all other data remains the same.

In this section, we will cover Creating a New Instructor Led Class. If you desire to enter an online training, please contact Strategic Development at DCF.LMSsupport@ks.gov. The telephone number is (785) 296-4327.

Class Information Sheet Example

New Date:

Revised Date:

Scheduled: **Added:**

CLASS INFORMATION FOR INSTRUCTOR-LED TRAININGS

General Information

Course Name: Pathlore Training

Course Code: SDIMRG0101

Class Contact: Jane Doe

Enrollment Close Date: 4/1/2019

| 1 st or Only | 2 nd | 3 rd | 4 th |
|-------------------------|------------------|------------------|------------------|
| Class or Session | Class or Session | Class or Session | Class or Session |

Start Date: 04/04/19

Start Time: 8:30 am

End Date: 04/04/19

End Time: 12:30 pm

Training Facility: DCF Administration Building

Training Facility Address: 555 S. Kansas Avenue

Training Facility City: Topeka

Training Facility Room: Computer Lab Room B101

Class Size: Maximum 10 Minimum 4

Instructor(s): Jane Doe

Delivery Method: Classroom Instruction

Class Notes: None

Equipment Needed:

Optional

Site Contact Person:

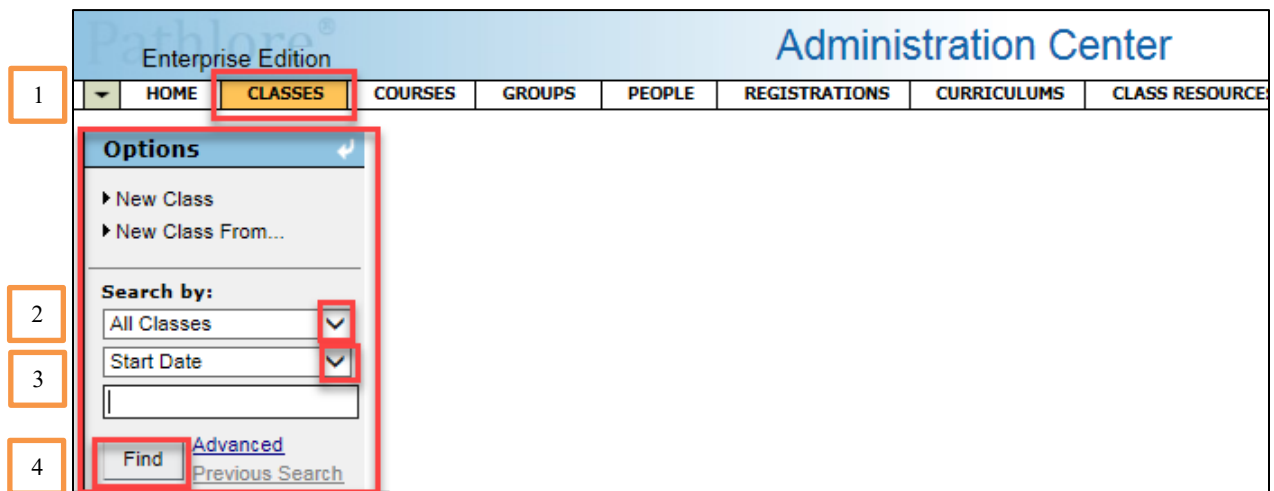
Site Contact Phone: Ext:

Additional Comments/Instructions:

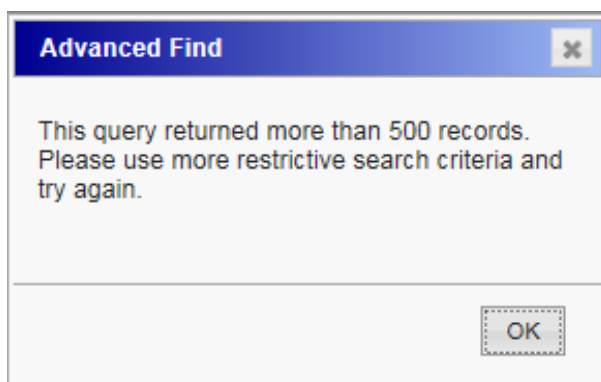
A new class is set up **after** the course has been established in the Pathlore database. Please make sure a class is not already established by searching for the class using the class start date.

Searching for a Class

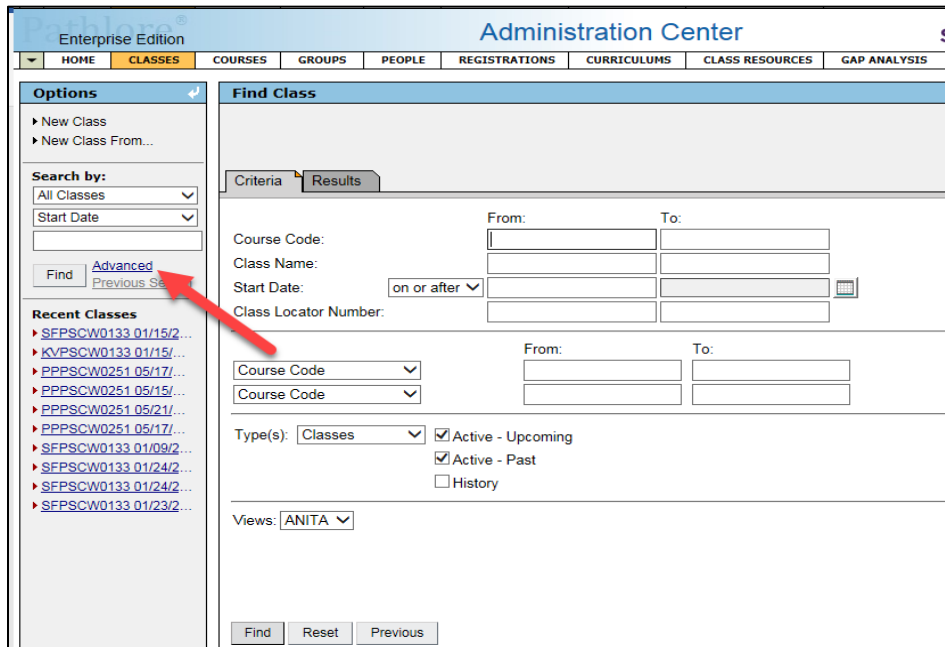
1. Select **Classes** from the Navigation bar.
2. From the **Options** panel under **Search By:** use the dropdown menu to select **All Classes**.
3. From the next dropdown menu, select **Start Date**.
4. Enter the date of the class you wish to enter and select **Find**.



A search query only allows 500 records to be returned by a search. The Advanced Find pop-up window will appear if a search results in greater than 500 records. It will be necessary to narrow the search by adding additional parameters through Advanced find. If the pop-up window appears, select OK and proceed to Advanced Search.



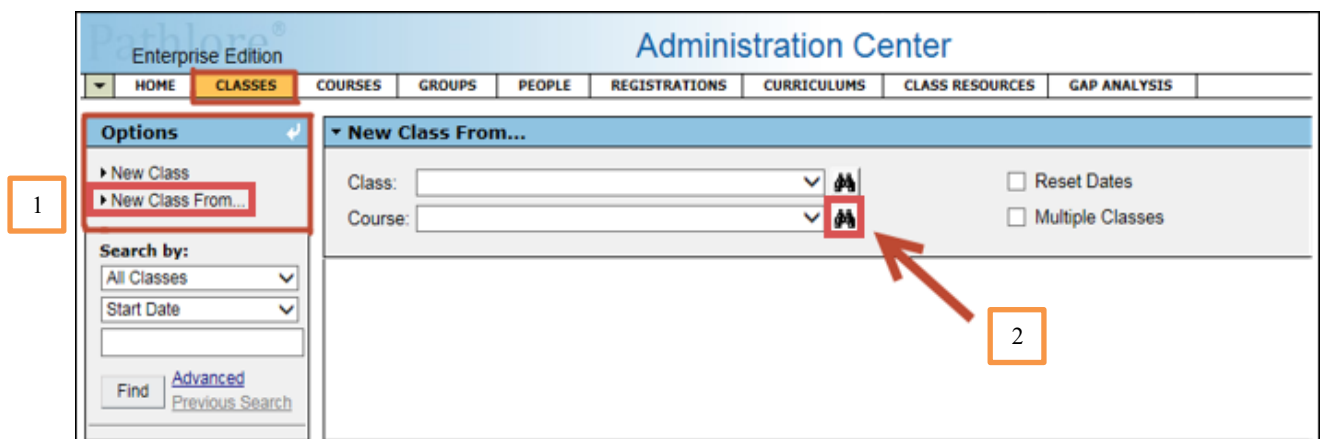
Use the **Advanced** search function to add additional search parameters. Access the Advanced search by selecting the **Advanced** link in the **Options** panel. See the Appendix section of this manual for information on using the Advanced search function.



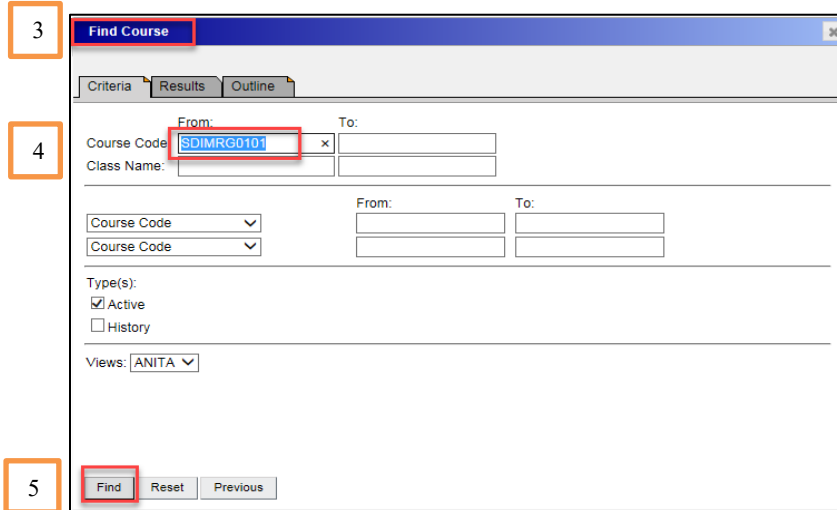
If the Class is **not** found in Pathlore, you will need to create a new class.

Creating a New Instructor Led Class:

1. From the **Options** panel, select **New Class From...**
2. Select the binoculars at the end of **Course** field.



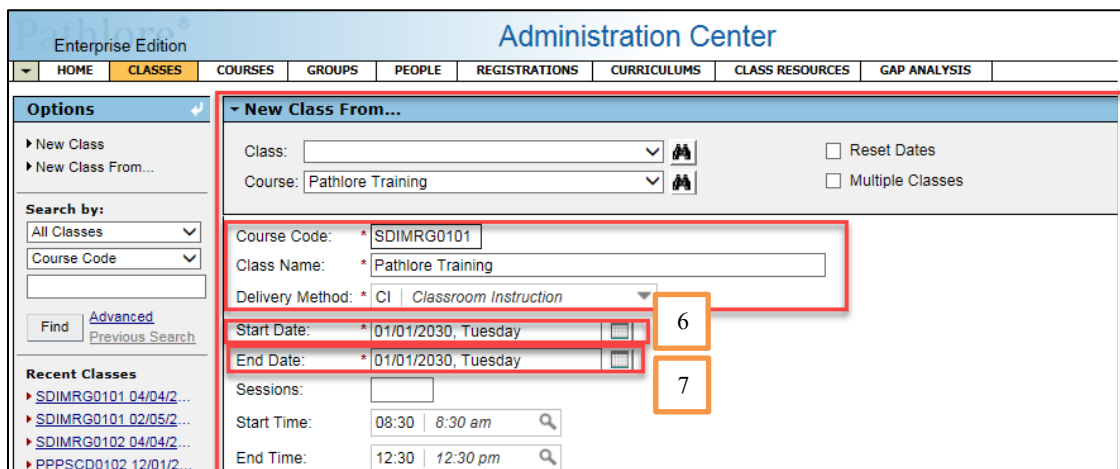
3. The **Find Course** pop-up screen will open.
4. Enter the **Course Code** number of the course in the From: portion of Course Code.
5. Select **Find** at the bottom of the pop-up.



The **New Class From** screen opens. Information which was entered in the **Course** will automatically populate on the screen. Double check any information that may have been entered into the Course, as all information from a course transfers over to the class.

Enter additional information specific to the class you are creating.

6. **Start Date** – Change the default date to the class start date, using the format MM/DD/YYYY or use the calendar icon at the end of the field to select a date.
7. **End Date** – Change the default date to the class end date using the format MM/DD/YYYY or use the calendar icon at the end of the field to select a date.

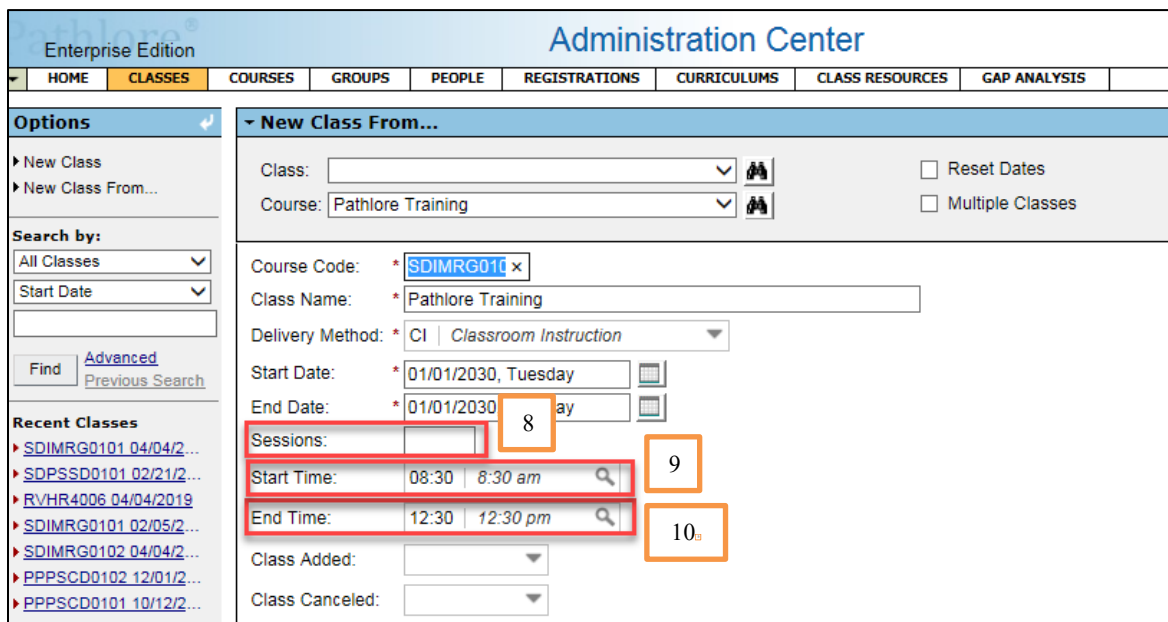


- Sessions** - A session is one continuous meeting of a class. If a class meets for three continuous days one week and for three continuous days the next week, the class would have two sessions. This field is left blank. The system will enter a value in this field if multiple sessions are entered in the Sessions folder.

If you wish additional training on sessions, contact Strategic Development at DCF.LMSsupport@ks.gov. The telephone number is (785) 296-4327.

- Start time** - enter the time the class starts or select from the look-up table.
- End time** - enter the time the class ends or select from the look-up table.

NOTE: Time is noted in Military Time i.e. 1:00 p.m. = 13:00.



The screenshot shows the 'Administration Center' interface for creating a new class. The 'New Class From...' section contains the following fields and values:

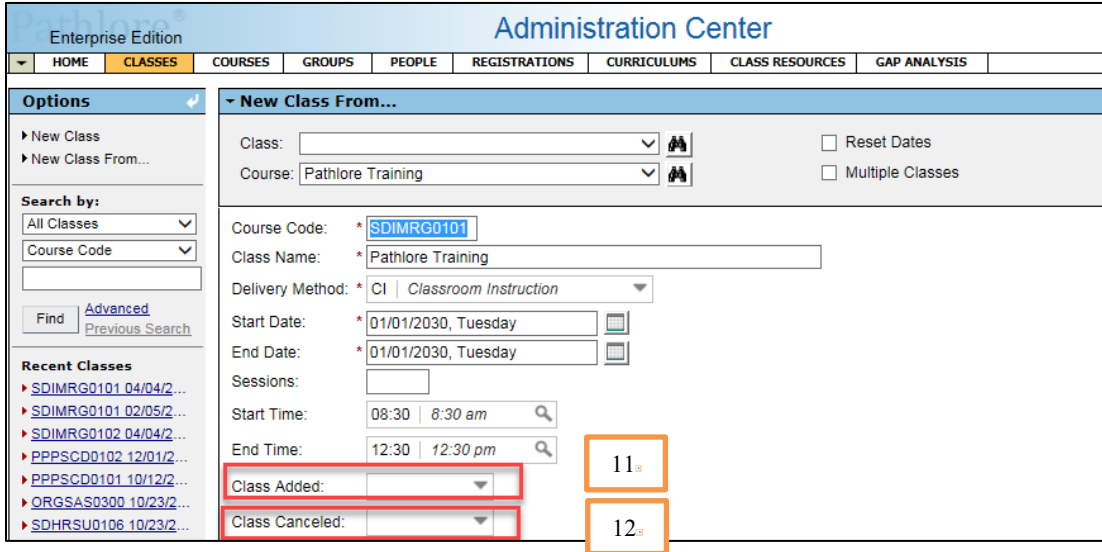
- Class: (empty dropdown)
- Course: Pathlore Training
- Course Code: SDIMRG01
- Class Name: Pathlore Training
- Delivery Method: CI Classroom Instruction
- Start Date: 01/01/2030, Tuesday
- End Date: 01/01/2030, 8 ay
- Sessions: (empty text box)
- Start Time: 08:30 8:30 am
- End Time: 12:30 12:30 pm
- Class Added: (empty dropdown)
- Class Canceled: (empty dropdown)

Annotations in the image include:

- A red box around the 'Sessions' field.
- An orange box with the number '8' pointing to the 'Sessions' field.
- An orange box with the number '9' pointing to the 'Start Time' field.
- An orange box with the number '10' pointing to the 'End Time' field.

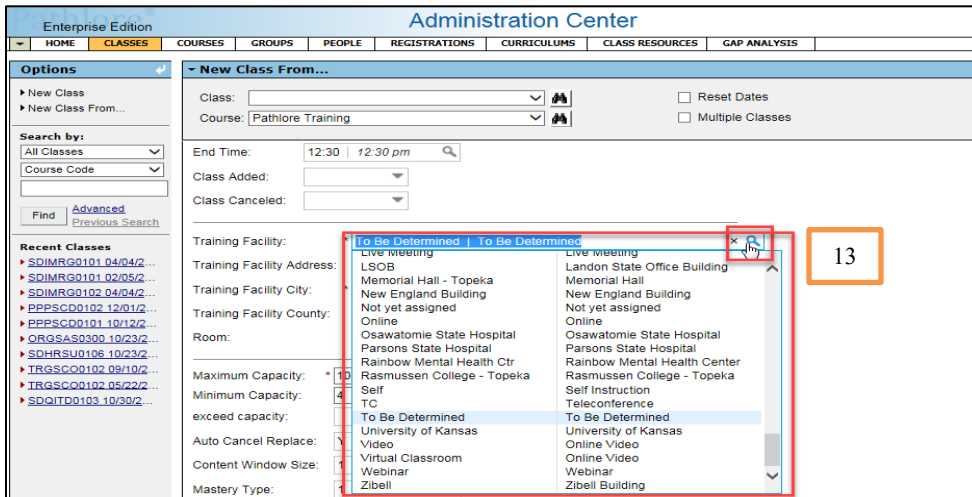
- Class Added** – There is no requirement for an entry in this field. It used only if there is a desire to identify classes that were not originally planned but added later. For example, six classes of a given course were entered into the system before the start of the year and then in June two more are added because all the remaining classes are full. If there was a desire to identify these additional classes in June, then ‘Y/Yes’ would be selected from the drop-down menu when entering the class.

12. **Class Canceled** – when setting up a class leave this field blank. (How to Cancel a Class will be addressed later in the manual and also in the Appendix)



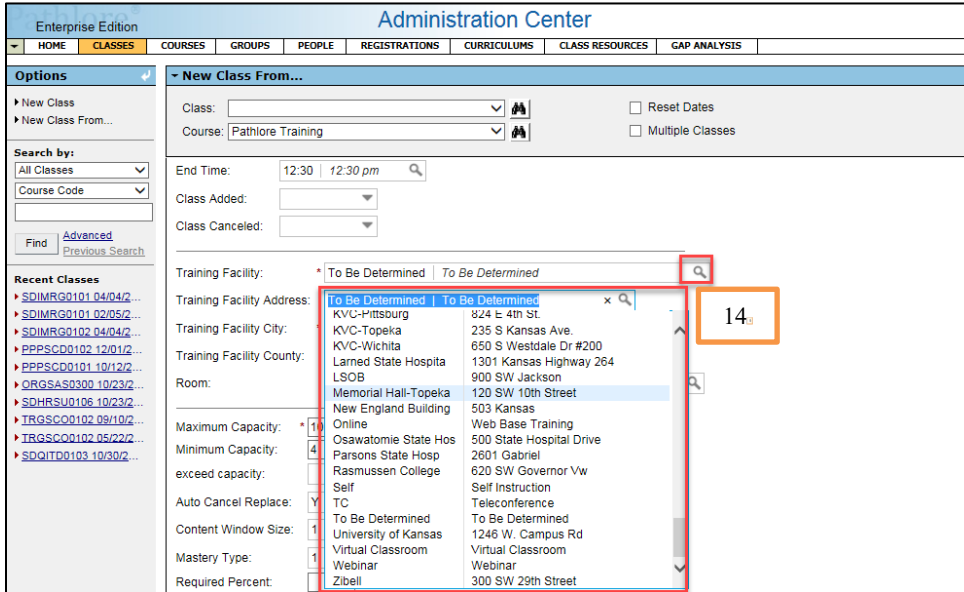
The screenshot shows the 'New Class From...' form in the Pathlore Administration Center. The 'Class Canceled' dropdown menu is highlighted with a red box and labeled '12'. The 'Class Added' dropdown menu is also highlighted with a red box and labeled '11'. Other fields include Course Code (SDIMRG0101), Course Name (Pathlore Training), Delivery Method (Classroom Instruction), Start Date (01/01/2030), End Date (01/01/2030), Start Time (08:30), and End Time (12:30).

13. **Training Facility** - select a training facility from the lookup table. This is a required field. If training facility is not in the lookup table, enter it manually. It is important to enter information about the training facility, as this can be used in auto letters and the information is visible in the Training Center.



The screenshot shows the 'New Class From...' form in the Pathlore Administration Center. The 'Training Facility' dropdown menu is highlighted with a red box and labeled '13'. The dropdown menu is open, showing a list of training facilities including 'Live Meeting', 'LSOB', 'Memorial Hall - Topeka', 'New England Building', 'Not yet assigned', 'Online', 'Osawatomie State Hospital', 'Parsons State Hospital', 'Rainbow Mental Health Ctr', 'Rasmussen College - Topeka', 'Self', 'TC', 'To Be Determined', 'University of Kansas', 'Virtual Classroom', 'Webinar', and 'Zibell'. Other fields include End Time (12:30), Class Added, Class Canceled, Training Facility Address, Training Facility City, Training Facility County, Room, Maximum Capacity (10), Minimum Capacity (4), exceed capacity, Auto Cancel Replace, Content Window Size, and Mastery Type.

14. **Training Facility Address** - select the correct address from the lookup table. If address is not in drop down menu, you may enter the value manually.



Enterprise Edition Administration Center

HOME CLASSES COURSES GROUPS PEOPLE REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS

Options

New Class From...

Class: [dropdown] [icon] Reset Dates

Course: Pathlore Training [dropdown] [icon] Multiple Classes

End Time: 12:30 12:30 pm [search]

Class Added: [dropdown]

Class Canceled: [dropdown]

Training Facility: * To Be Determined To Be Determined [search]

Training Facility Address: To Be Determined To Be Determined [search]

Training Facility City: [dropdown] [search]

Training Facility County: [dropdown] [search]

Room: [dropdown] [search]

Maximum Capacity: * 10 [dropdown]

Minimum Capacity: 4 [dropdown]

exceed capacity: [checkbox]

Auto Cancel Replace: Y [checkbox]

Content Window Size: 1 [dropdown]

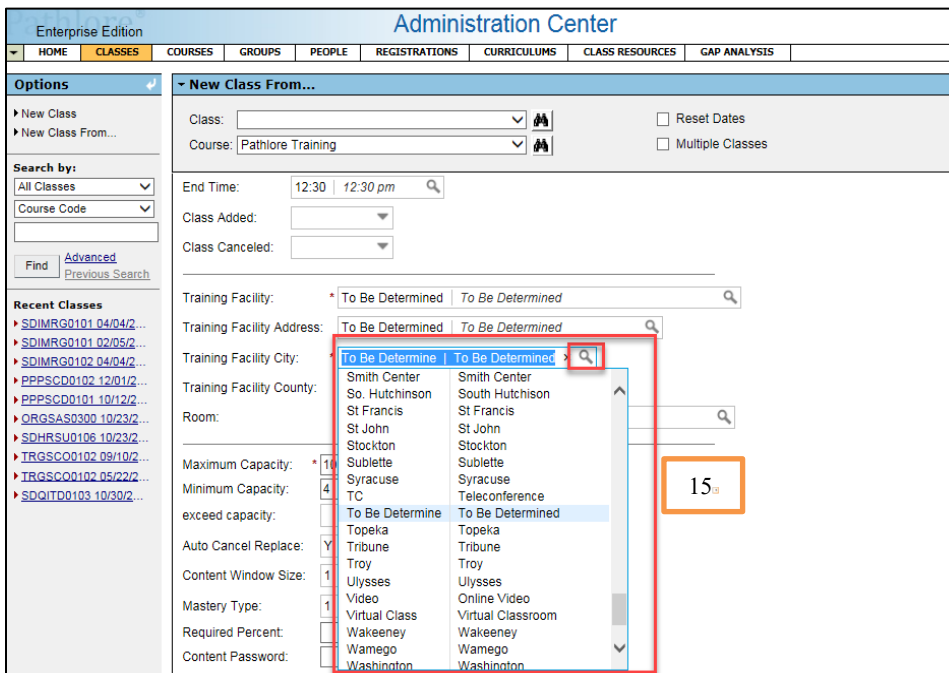
Mastery Type: 1 [dropdown]

Required Percent: [checkbox]

Recent Classes

- SDIMRG0101 04/04/2...
- SDIMRG0101 02/05/2...
- SDIMRG0102 04/04/2...
- PPPSCD0102 12/01/2...
- PPPSCD0101 10/12/2...
- ORGSAS0300 10/23/2...
- SDHRSU0106 10/23/2...
- TRGSC00102 09/10/2...
- TRGSC00102 05/22/2...
- SDQITD0103 10/30/2...

15. **Training Facility City** - select the training facility city from the lookup table. This is a required field. If the city is not in the drop-down menu, enter it manually.



Enterprise Edition Administration Center

HOME CLASSES COURSES GROUPS PEOPLE REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS

Options

New Class From...

Class: [dropdown] [icon] Reset Dates

Course: Pathlore Training [dropdown] [icon] Multiple Classes

End Time: 12:30 12:30 pm [search]

Class Added: [dropdown]

Class Canceled: [dropdown]

Training Facility: * To Be Determined To Be Determined [search]

Training Facility Address: To Be Determined To Be Determined [search]

Training Facility City: To Be Determined To Be Determined [search]

Training Facility County: [dropdown] [search]

Room: [dropdown] [search]

Maximum Capacity: * 10 [dropdown]

Minimum Capacity: 4 [dropdown]

exceed capacity: [checkbox]

Auto Cancel Replace: Y [checkbox]

Content Window Size: 1 [dropdown]

Mastery Type: 1 [dropdown]

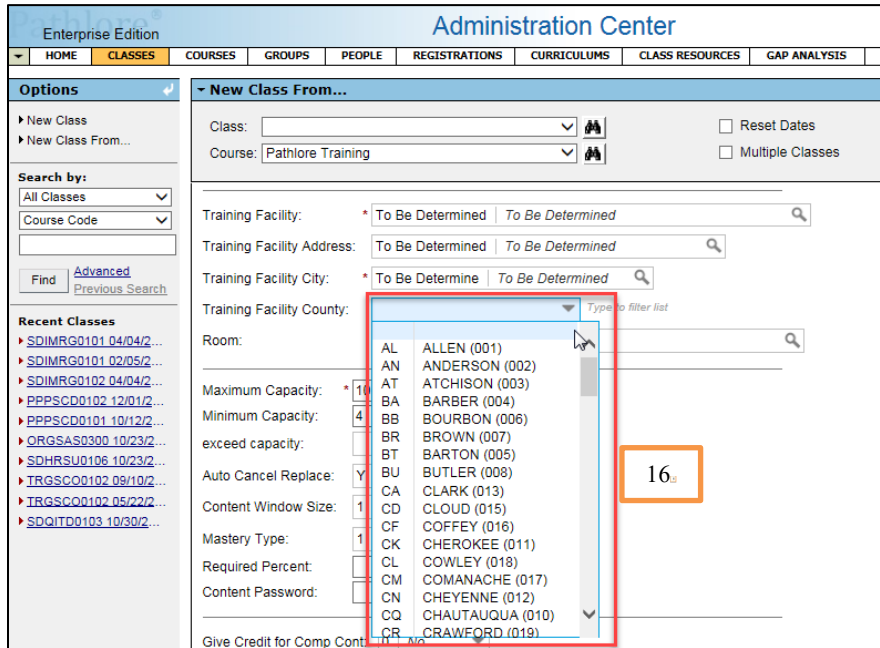
Required Percent: [checkbox]

Content Password: [checkbox]

Recent Classes

- SDIMRG0101 04/04/2...
- SDIMRG0101 02/05/2...
- SDIMRG0102 04/04/2...
- PPPSCD0102 12/01/2...
- PPPSCD0101 10/12/2...
- ORGSAS0300 10/23/2...
- SDHRSU0106 10/23/2...
- TRGSC00102 09/10/2...
- TRGSC00102 05/22/2...
- SDQITD0103 10/30/2...

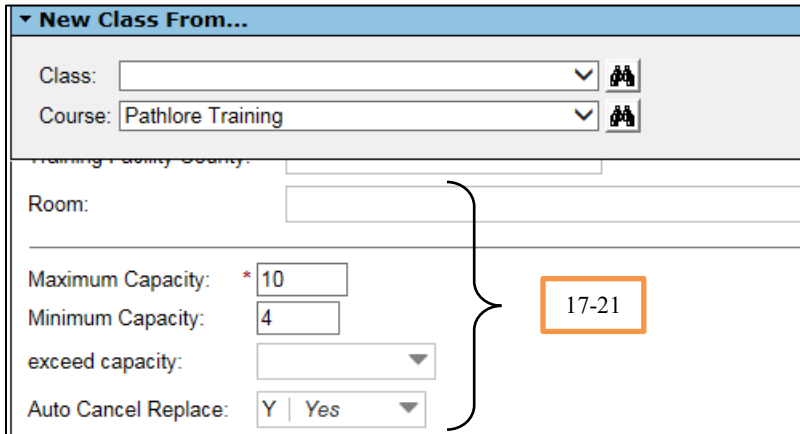
16. **Training Facility County** – select a two-letter county abbreviation corresponding to the training location, from the drop-down menu.



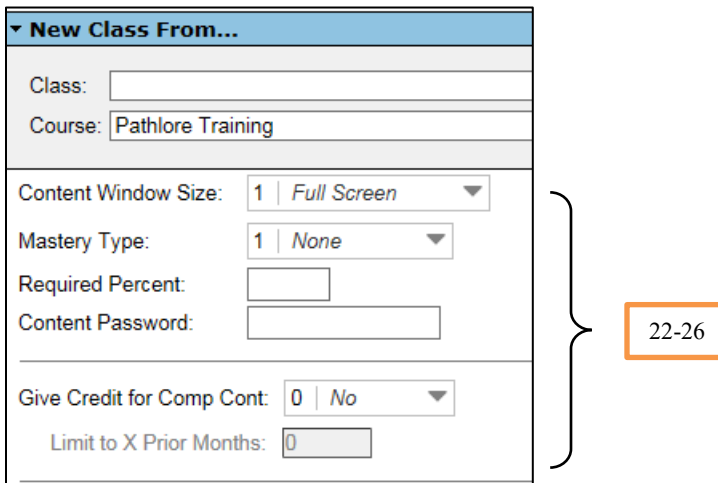
The screenshot shows the 'New Class From...' form in the Pathlore Administration Center. The 'Training Facility County' dropdown menu is open, displaying a list of counties. An orange box highlights the dropdown menu, and a red box highlights the list of counties. A small orange box with the number '16.' is placed over the list.

| County Abb. | County Name |
|-------------|------------------|
| AL | ALLEN (001) |
| AN | ANDERSON (002) |
| AT | ATCHISON (003) |
| BA | BARBER (004) |
| BB | BOURBON (006) |
| BR | BROWN (007) |
| BT | BARTON (005) |
| BU | BUTLER (008) |
| CA | CLARK (013) |
| CD | CLOUD (015) |
| CF | COFFEY (016) |
| CK | CHEROKEE (011) |
| CL | COWLEY (018) |
| CM | COMANACHE (017) |
| CN | CHEYENNE (012) |
| CQ | CHAUTAUQUA (010) |
| CR | CRAWFORD (019) |

17. **Room** - select the room in which the training will be held from the look up table, or you may enter it manually. This information may also be used in auto letter and visible in the Training Center.
18. **Maximum Capacity** - this field represents the maximum number of participants who can enroll in this class. If the maximum capacity is different from what was in the course, make changes here. This can vary from class to class.
19. **Minimum Capacity** – this field represents the minimum number of participants who can be enrolled for the class to be held. If the minimum capacity is different from what was in the course, make changes here. This can vary from class to class.
20. **Exceed Capacity** – this field gives you the option to choose either “Hard” or “Soft” when setting the maximum and minimum capacity.
 - a. **Hard**-Enrollment status is always prohibited if it would cause the maximum capacity of a class to be exceeded.
 - b. **Soft**-The User is warned if an enrolled status registration would cause the maximum capacity of a class to be exceeded, but the administrator can override.
21. **Auto Cancel Replace** –Set this field to “Yes” if you wish for those registered as Wait Listed to be automatically enrolled into a class when a participant cancels out (and the class was at maximum capacity).



- 22. **Content Window Size** – for online training only.
- 23. **Mastery Type** –for online training only.
- 24. **Required Percent** – for online training only.
- 25. **Content Password** –for online training only.
- 26. **Give Credit for Comp Cont.** – for online training only.



- 27. **Contact Hours** – enter the number of hours the participant is in actual training. This does not include lunch. (Example – training is from 10 a.m. to 4 p.m. with a 1-hour lunch. Contact hours will be 5 hours.)
- 28. **CEPS** – leave blank. This field is not being used at this time
- 29. **CEU – CME I**-enter the number of hours offered for CME I, if applicable.
- 30. **CEU – CME II**-enter the number of hours offered for CME II, if applicable.
- 31. **CEU – Nursing**-enter the number of hours offered for Nursing CEUs, if applicable.

32. **CEU – Psychology** -enter the Psychology CEUs hours, if applicable.

| ▼ New Class From... | |
|---------------------|-------------------------------------|
| Class: | <input type="text"/> |
| Course: | Pathlore Training |
| Contact Hours: | * <input type="text" value="2.00"/> |
| CEPS: | <input type="text" value="0.00"/> |
| CEU - CME I: | <input type="text" value="0.00"/> |
| CEU - CME II: | <input type="text" value="0.00"/> |
| CEU - Nursing: | <input type="text" value="0.00"/> |
| CEU - Psychology: | <input type="text" value="0.00"/> |

27-32

- 33. **CEU – General Social Work-**
- 34. **CEU – Ethics Social Work**
- 35. **CEU – DSM Social Work**
- 36. **CEU – Safety Social Work**

Social Work CEU fields are greyed out. Contact Strategic Development to have Social Work CEUs hours entered.

| ▼ Class | | | | | | | | |
|--|-----------------------------------|---------|---------|-------|---------|--------|-------|--------|
| SDIMRG0101 | Pathlore Training | | | | | | | |
| Max Capacity: 10 | Seats Available: 10 | | | | | | | |
| Enr | | | | | | | | |
| <table border="1"> <tr> <th>ID Data</th> <th>Roster</th> <th>To-Do</th> <th>Content</th> <th>Info</th> <th>Notes</th> <th>Budget</th> </tr> </table> | | ID Data | Roster | To-Do | Content | Info | Notes | Budget |
| ID Data | Roster | To-Do | Content | Info | Notes | Budget | | |
| CEU - General Social Work: | <input type="text" value="0.00"/> | | | | | | | |
| CEU - Ethics Social Work: | <input type="text" value="0.00"/> | | | | | | | |
| CEU - DSM Social Work: | <input type="text" value="0.00"/> | | | | | | | |
| CEU - Safety Social Work: | <input type="text" value="0.00"/> | | | | | | | |

33-36

- 37. **CEU – Audits** enter the number of hours offered for Audit CEUs, if applicable.
- 38. **CEU – Government** enter the Government CEUs hours, if applicable.
- 39. **Education Credit Hours-** enter the Educational Credit hours, if applicable.
- 40. **Education Level-**enter the education level of the training if applicable.
- 41. **Award Hours-** enter the number of award hours, if applicable.

| ▼ New Class From... | |
|-------------------------|-----------------------------------|
| Class: | <input type="text"/> |
| Course: | Pathlore Training |
| CEU - Audits: | <input type="text" value="0.00"/> |
| CEU - Government: | <input type="text" value="0.00"/> |
| Education Credit Hours: | <input type="text" value="0.00"/> |
| Education Level: | <input type="text"/> |
| Award Hours: | <input type="text" value="0.00"/> |

Enter any applicable information (optional)

37-41

Social Work CEU's are pre-approved through a Providership with the Kansas Behavioral Sciences Regulatory Board (KSBSRB). The courses are approved and signed off by the provider for Department for Children and Families (DCF). All hours within these fields can only be entered by Strategic Development. For more information on Social Work CEU's, contact Strategic Development at 785-296-8192.

- 42. **Keywords** - Words entered in this field are used for searches performed in the Training Center. You can enter words which would help a participant search for the course in the Training Center. This field is helpful if the person searching does not know the exact title of the training or if looking for content. Some examples would be “CEU”, “Social Work”, “CPR”, “Tax Policy”, etc. This field is optional. You do not need to enter any word in the title as those are searchable in the Training Center.
- 43. **PMP Competencies** - enter any State of Kansas PMP Competencies this course addresses.

NOTE: Enter the competencies in alphabetical order separated by a comma. Example: Accountability, Customer Service, Teamwork

Enterprise Edition Administration Center


HOME CLASSES COURSES GROUPS PEOPLE REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS


| Options | ▼ New Class From... | |
|--|---|---|
| <ul style="list-style-type: none"> ▶ New Class ▶ New Class From... | Class: <input type="text"/> | <input type="checkbox"/> Reset Dates |
| Search by: <input type="text" value="All Classes"/> | Course: Pathlore Training | <input type="checkbox"/> Multiple Classes |
| <input type="text"/> | Keywords: <input type="text" value="CEU, Social Work"/> | |
| <input type="text"/> | PMP Competencies: <input type="text" value="Customer Service, Teamwork"/> | |


- 44. **Instructor** - Enter the name of the instructor(s) for this class. There is room for up to five (5) instructors per class. Check for correct spelling. If there is no instructor assigned to the class at the time you enter it in Pathlore, be sure to add them as the instructors are determined.


NOTE: You may enter information about instructors in the Info section (ie, Resume)

▼ New Class From...

Class:  Reset Dates

Course: Pathlore Training  Multiple Classes

Instructor 1: 

Instructor 2: 

Instructor 3:

Instructor 4:


Instructor 5:


44

- 45. **Class Owner** - will automatically populate with information from the Course.
- 46. **Unit Responsible** - will automatically populate with information from the course.

NOTE: If you are **not** the original class owner and are setting up this class for your unit, you will need to change the **Class Owner** field to reflect your ownership. Use the drop-down menu to select your ownership code. The **Unit Responsible** should not be changed.
- 47. **Class Enter Date** – enter the actual date that the class information is being keyed into Pathlore. You may enter using the format MM/DD/YYYY or use the calendar icon and select the date.
- 48. **Target Audience** – allows you to utilize a drop-down menu to choose the target audience for the training.
- 49. **Offer Online Only** – choose No for Instructor led training.


▼ New Class From...

Class: 

Course: Pathlore Training 

Class Owner: * SD | Strategic Development

Unit Responsible: SD | Strategic Development

Class Enter Date: 

Target Audience:

Offer Online Only: N | No

45-49

- 50. **Create Date**-this field is grayed out and will automatically populate when you save the class.
- 51. **Import Date** this field is grayed out and will automatically populate when you save the class.
- 52. **Date last update**- this field is grayed out and will automatically populate when you save the class.
- 53. **Updated By**- this field is grayed out and will automatically populate when you save the class.

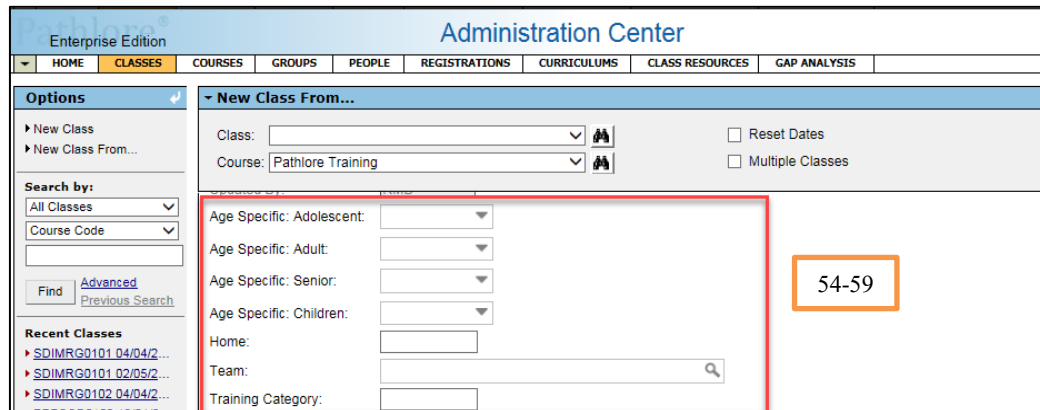
50-53

| | |
|-------------------|--------------------|
| Create Date: | 12/14/2018, Friday |
| Import Date: | |
| date last update: | 02/18/2019, Monday |
| Updated By: | RMBDISPLAY |

When the class is saved, these fields are automatically populated

- 54. **Age Specific:** Adolescent
- 55. **Age Specific:** Adult
- 56. **Age specific:** Children
- 57. **Home:**
- 58. **Team:**
- 59. **Training Category:**

These fields are optional.



The screenshot shows the 'Administration Center' interface. The 'New Class From...' section contains several fields. A red box highlights the 'Age Specific' dropdowns for Adolescent, Adult, Senior, and Children, which are labeled '54-59' in an orange box. Other visible fields include 'Class', 'Course', 'Home', 'Team', and 'Training Category'. There are also checkboxes for 'Reset Dates' and 'Multiple Classes'.

- 60. **Self Reg. Must Call** – leave the field blank if self-registration is allowed from the Training Center. If self-registration is not allowed, from drop down select **A** - approval needed, **I** – invitation only or **S** – supervisors only. If one of these values is selected, a person wishing to enroll would see a message in the Training Center to contact a Pathlore Administrator to be enrolled.

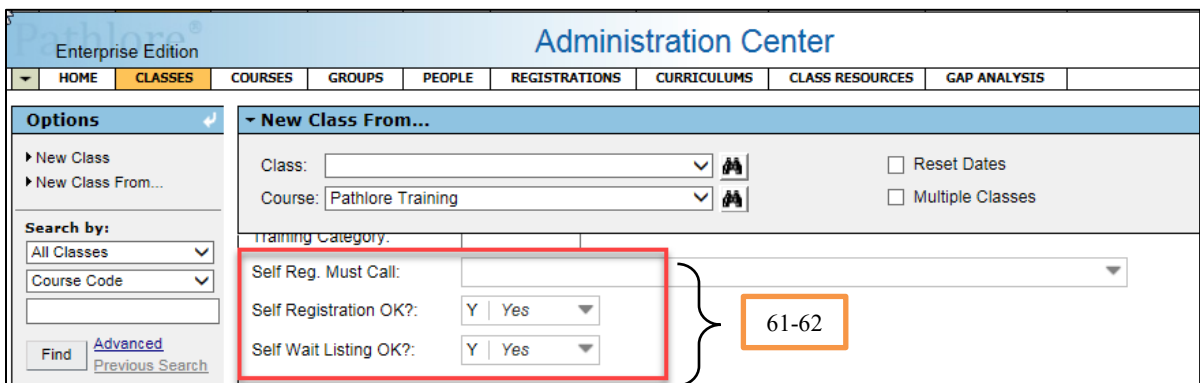
“Please contact your local Pathlore Administrator or Training Department if you want to register in this class or change this registration.”

| | |
|------------------------|---|
| Self Reg. Must Call: | 60 |
| Self Registration OK?: | A Approval Needed - Get supervisor's OK, then contact your Pathlore administrator |
| Self Wait Listing OK?: | I Invitation Only |
| | S Supervisors Only |

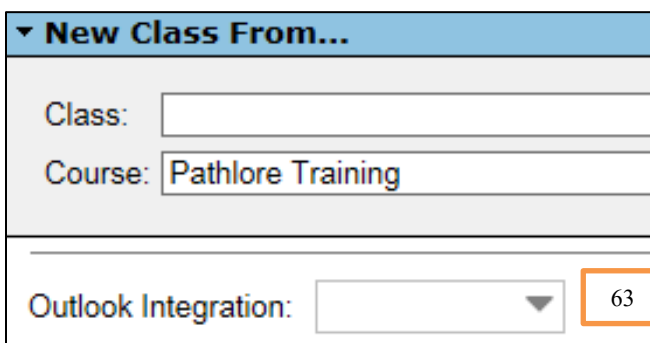
61. **Self-Registration OK?** - from the drop down to select **Yes** if self-registration is allowed. Yes, will allow for staff to register through the Training Center.

NOTE: This field also determines if the course is visible in the Training Center. If “Yes” is selected, the course is visible. If “No” is selected, the course is not visible.

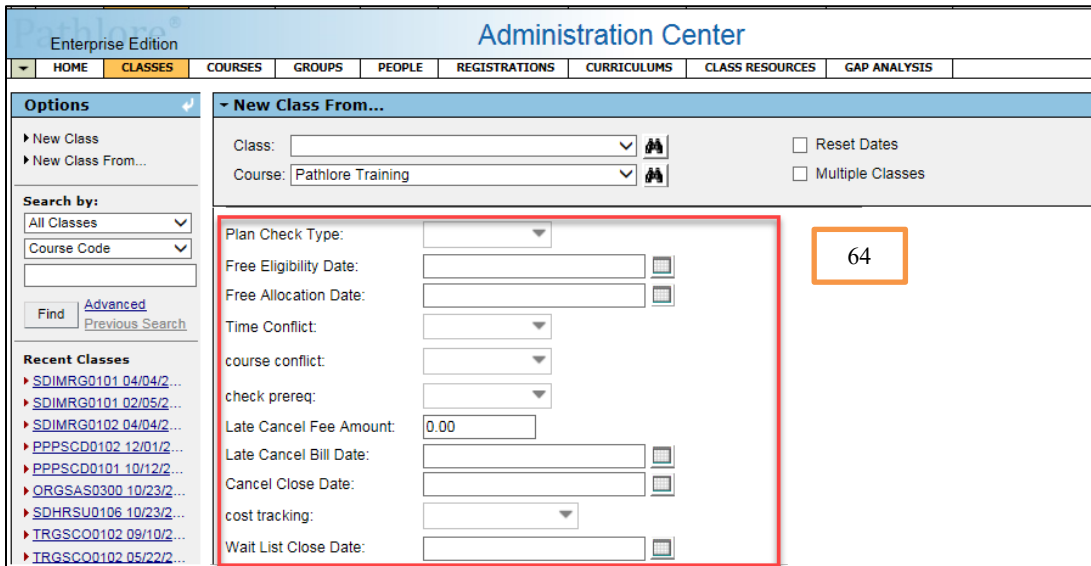
62. **Self-Wait OK?** - from the drop down, select **Yes** if people can add themselves to the wait list for the class if it reaches maximum capacity. Select **No** if people are not allowed to add themselves to the wait list for the class.



63. **Outlook Integration**-If you select Yes for this field then the recipients (those who enroll) can update their calendar in Microsoft Outlook directly from the email they receive.



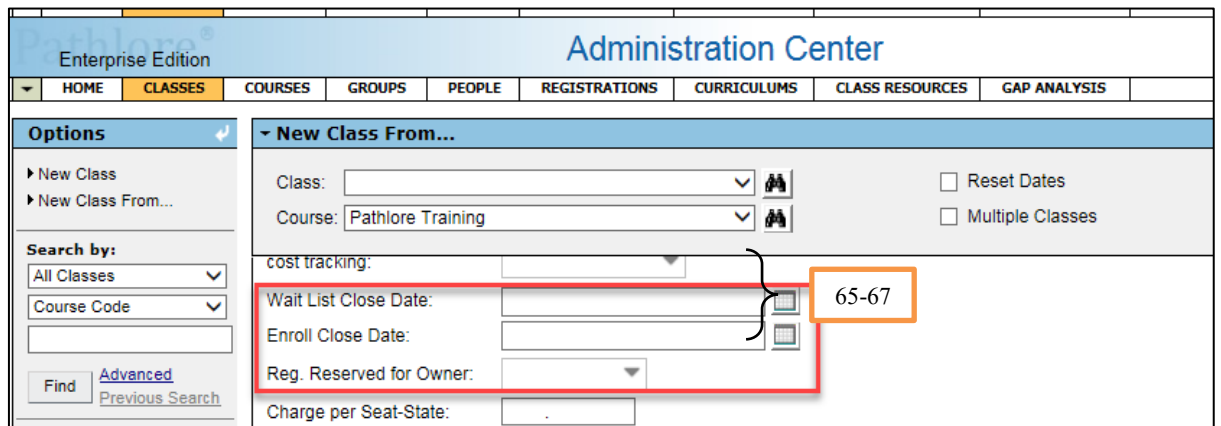
64. **Plan Check Type** fields through **Cost Tracking** will not have entries.



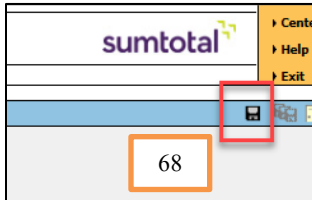
65. **Wait List Close Date** – this is an optional field. If you want to establish the last date a person can be added to the waitlist if a class is full, use format MM/DD/YYYY and enter a date. If you do not want a wait list close date leave this field blank.

66. **Enroll Close Date** – this is an optional field. If you want to establish the date enrollment will close enter a date here. Otherwise leave this field blank. Use the format MM/DD/YYYY.

67. **Reg. Reserved for Owner** - select **Y**-yes if only administrators with the same course ownership profile can register participants in the class. If left blank or “N-no” is selected any Pathlore administrator can add registrations to the class.



68. Double check that all information is correct and select the **Save Icon** in the Toolbar in the upper right-hand corner to save.



Creating an Instructor-Led Class from a Class

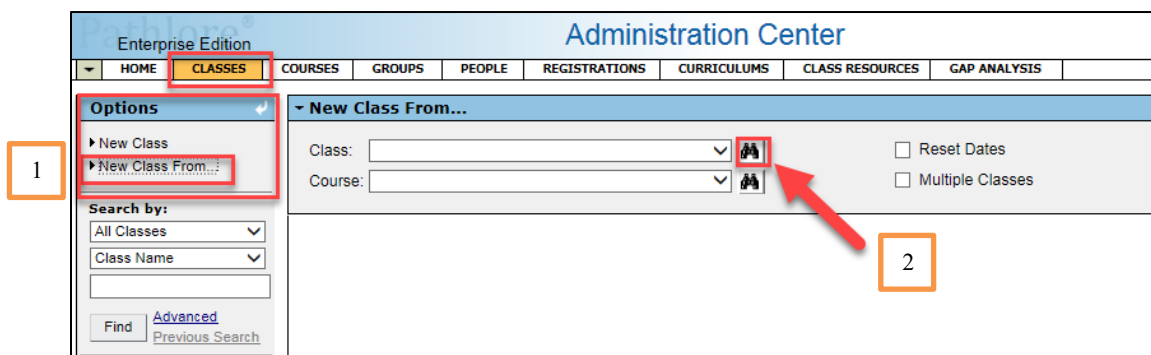
Usually classes are created from courses, but there are situations when it would be faster to create a class from another class. For example: if a course was being delivered once a month for six months. Each class will be at the same location and have the same instructor. By creating a class from a class, you will only need to change a limited number of fields such as the start date and end date. If the six classes were each created from the course, it would be necessary to change all the specific information that was in the course, including the location and instructor when creating each class.

In the example above, an alternate method would be to create the first class (from the course), make the necessary entries, and then create each of the additional five classes from the first class you created. When each of the five classes are created, their fields will automatically be populated with the information from the first class. While the date and time of each of the classes would need to be updated, the location and instructor would have populated from the first class.

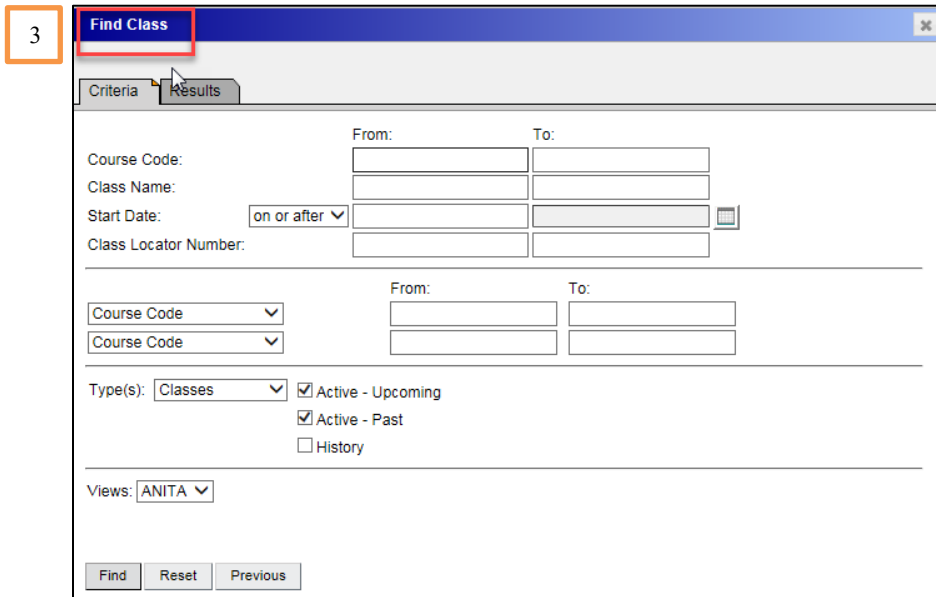
Caution: When creating a class from a class, be careful to review all fields that differ between the original class and the new class. It is easy to overlook a field when updating the new class.

The process of creating a class from a class is the same as creating a class from course except the starting point.

1. From the **Options** panel, select **New Class From**.
2. Select the binoculars at the end of **Class** field.



3. The **Find Class** screen will open.

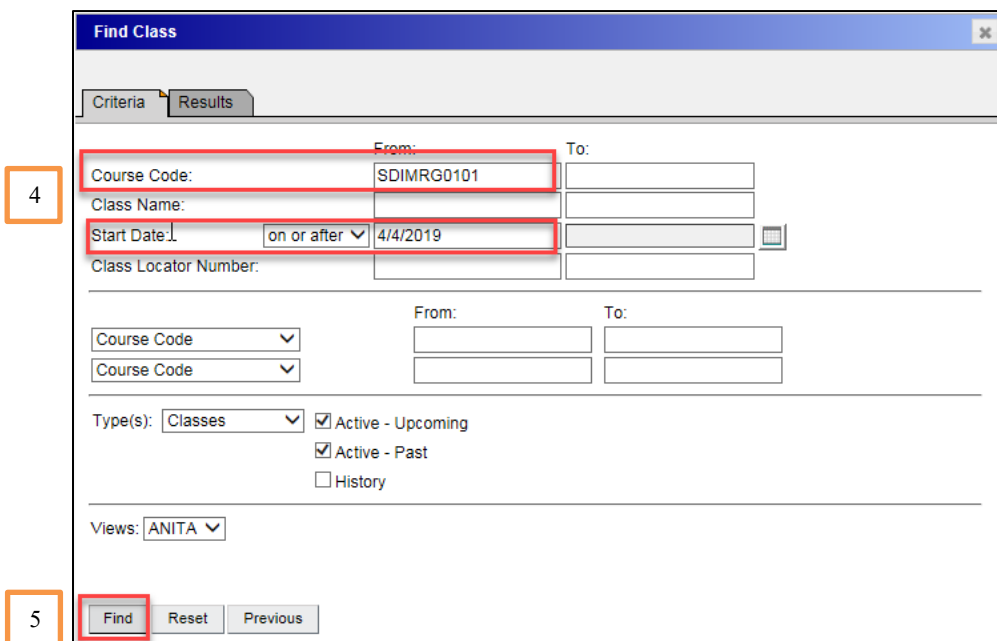


The screenshot shows the 'Find Class' window with the following fields and options:

- Criteria** tab selected.
- Course Code: [] From: [] To: []
- Class Name: []
- Start Date: [] on or after []
- Class Locator Number: []
- Course Code dropdown: [] From: [] To: []
- Course Code dropdown: [] From: [] To: []
- Type(s): Classes []
- Active - Upcoming
- Active - Past
- History
- Views: ANITA []
- Buttons: Find, Reset, Previous

4. Enter the **Course Code** number of your class and any other information which will help find the desired class you wish to copy. (For example, Start Date is a very useful field for finding a specific class.)

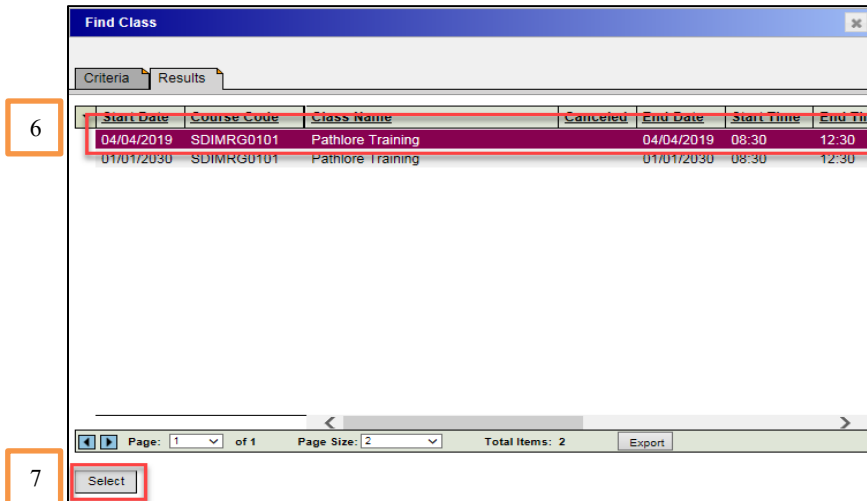
5. Select **Find**.



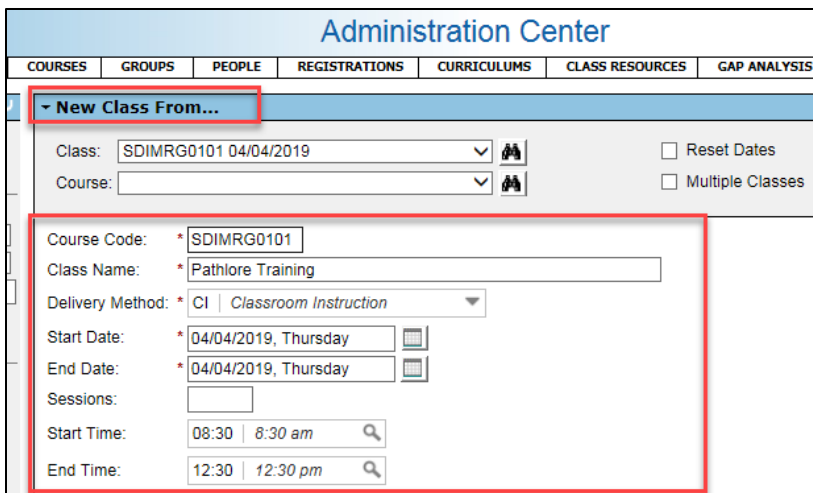
The screenshot shows the 'Find Class' window with the following fields and options:

- Criteria** tab selected.
- Course Code: SDIMRG0101 (highlighted with a red box)
- Class Name: []
- Start Date: 4/4/2019 (highlighted with a red box)
- Class Locator Number: []
- Course Code dropdown: [] From: [] To: []
- Course Code dropdown: [] From: [] To: []
- Type(s): Classes []
- Active - Upcoming
- Active - Past
- History
- Views: ANITA []
- Buttons: Find (highlighted with a red box), Reset, Previous

6. The **Find Class** screen will open displaying the class names and start dates that met the search criteria. Highlight the class that you wish to copy.
7. Choose **Select** at the bottom of the page.



The **New Class From** screen opens. All the fields in the new class will automatically populate with information from the class you copied. Go through **ALL** the fields of the new class and update the ones which differ from the original class. The process is the same as for creating a class from a course.

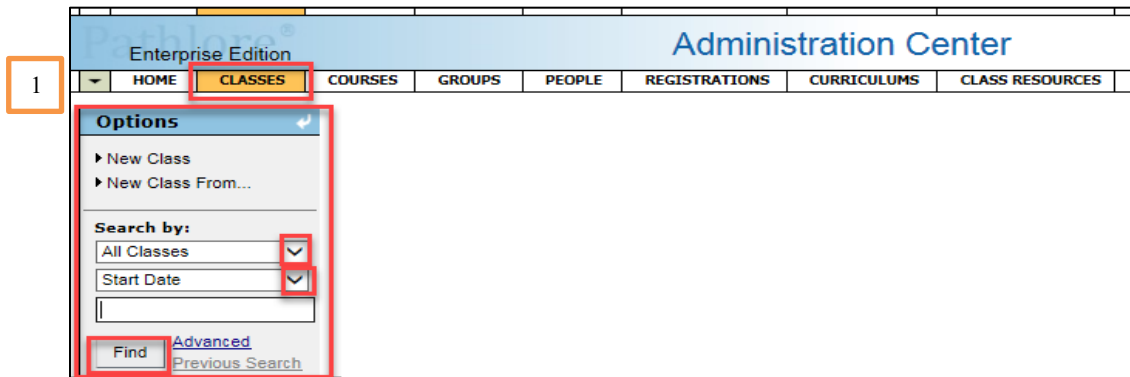


8. Once you have made all the entries, be sure to save at the end of the process by selecting the save button in the upper right-hand corner.

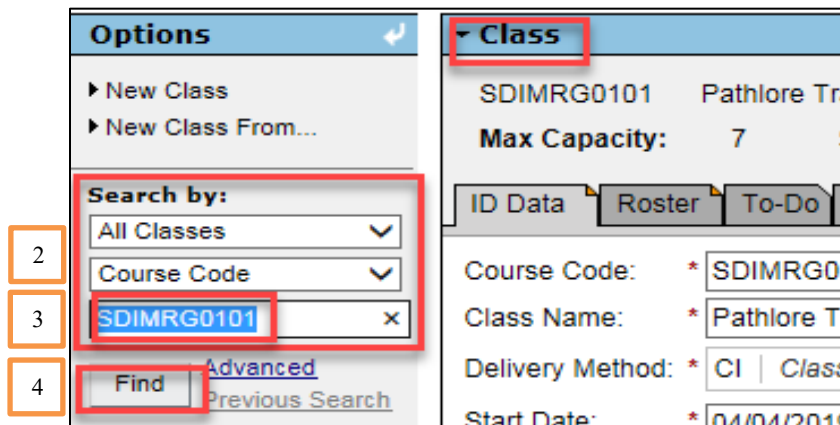


How to Cancel a Class

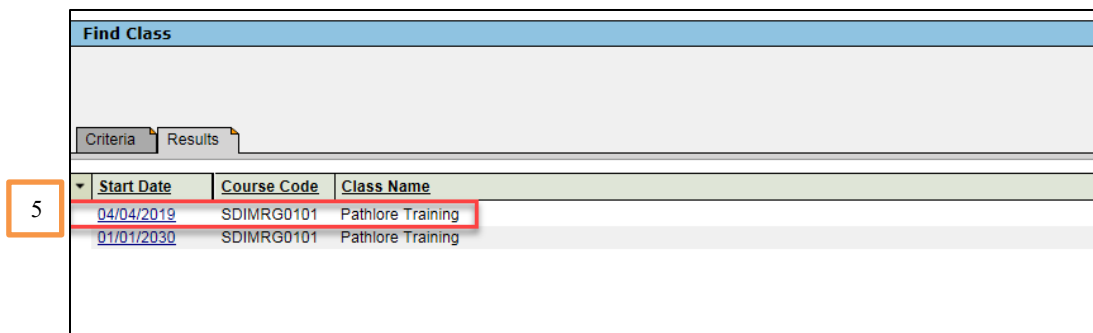
1. Select **Classes** from the tool bar.



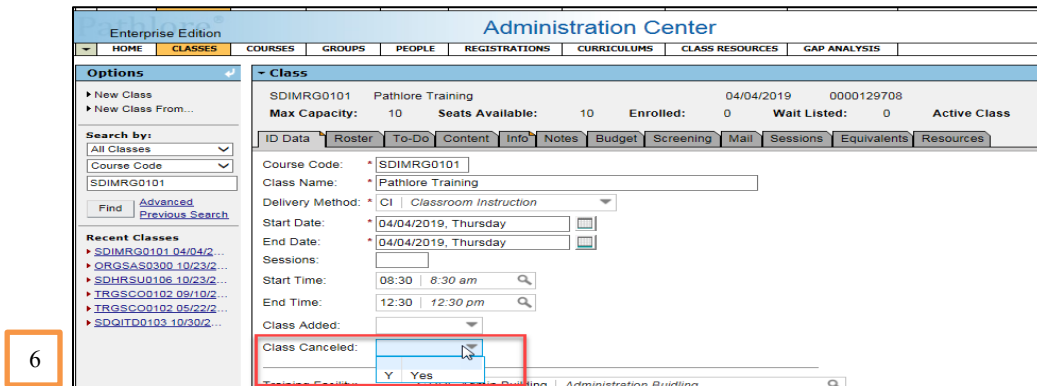
2. From **Options** panel under **Search By:** use the drop down and select **Course Code**.
3. Enter the class **Course Code**.
4. Select **Find**.



5. Scroll through to find the appropriate class to select the class you want to cancel. Double click on the date to open the class.



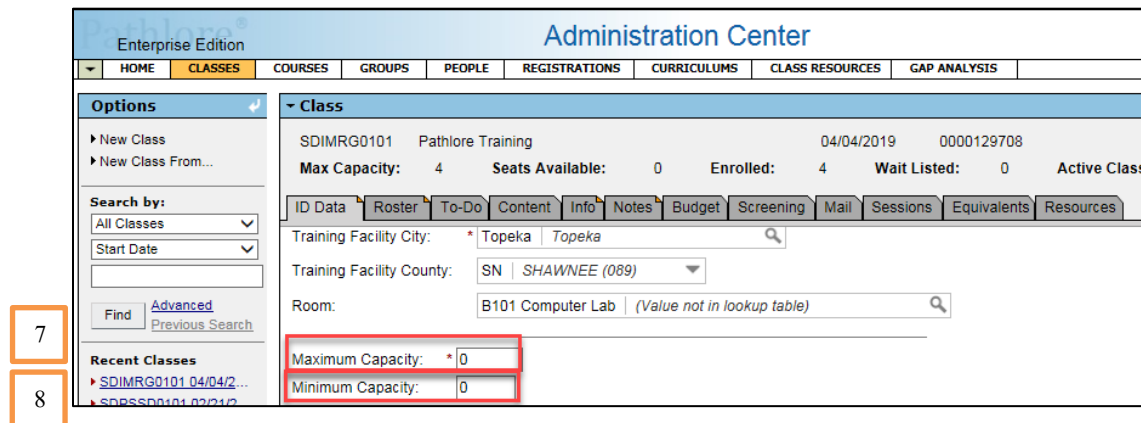
6. Scroll down to the **Class Canceled** field and select 'Y/Yes' from the drop-down.



Change the following additional fields in the training:

7. **Maximum Capacity** – change this value to 0.

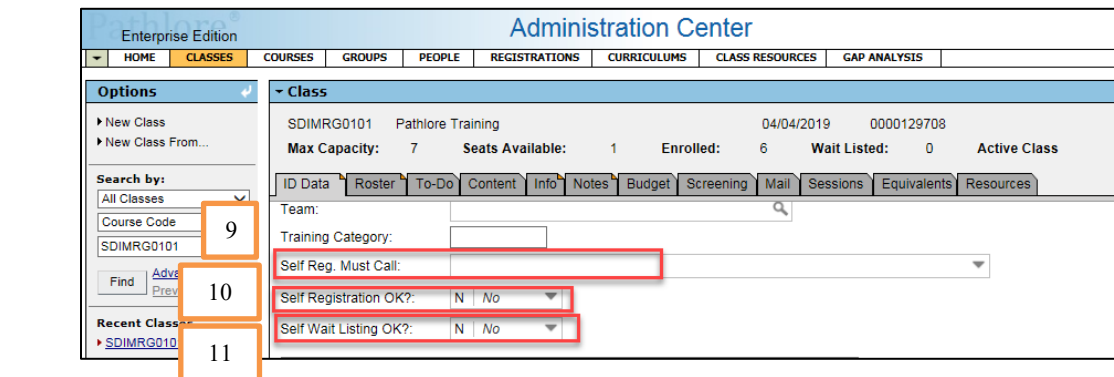
8. **Minimum Capacity** – change this value to 0.



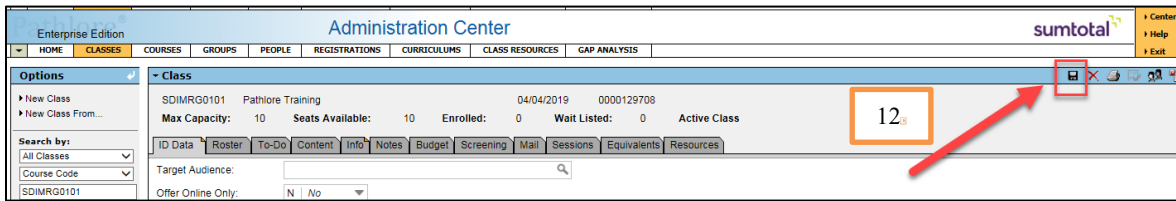
9. **Self-Registration Must Call** – select the blank space to delete any information in that field.

10. **Self-Registration OK?** – change this field to N.

11. **Self-Wait Listing OK?** - change this field to N.

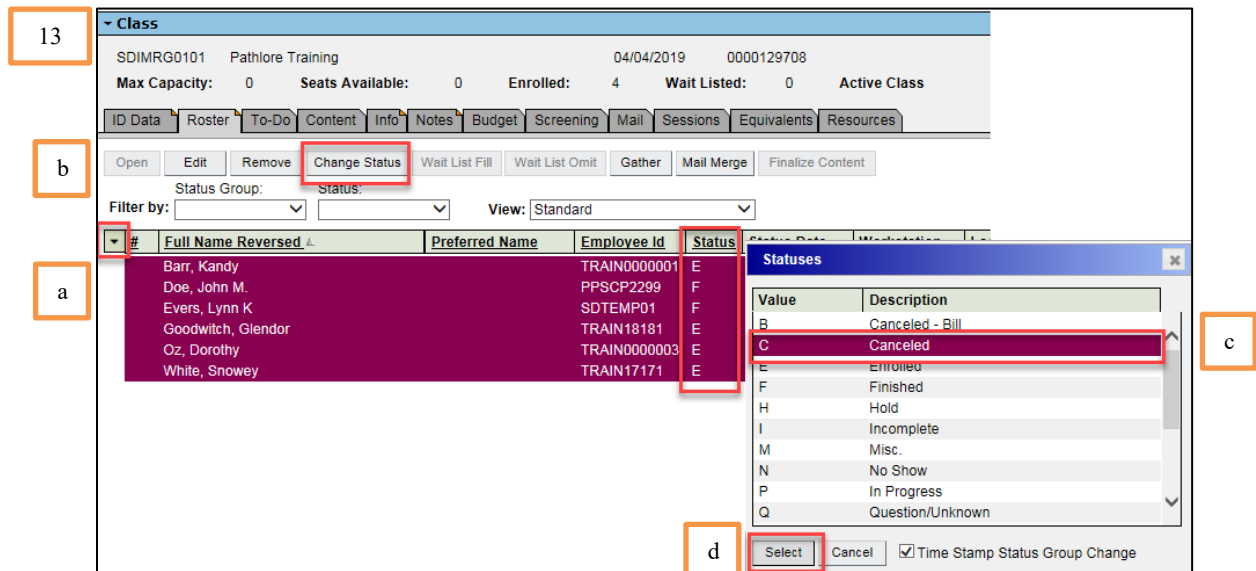


12. Select the **Save** icon on the toolbar upper right-hand corner.

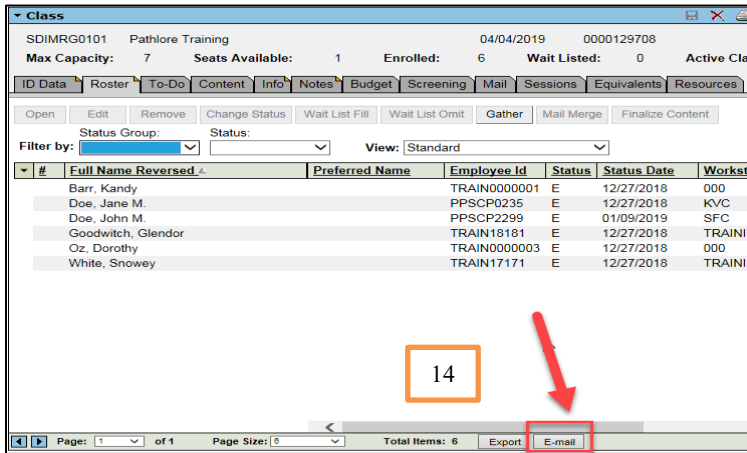


To complete the cancel class process:

13. Select the Roster tab to check for any participants enrolled in the class.
 - a. Highlight any participant with a status other than “C” by selecting the first name listed, holding down the CTRL key and continue selecting each name needing to be canceled out of the class.
 - b. Once all names needing to be cancelled are selected, you will select the **Change Status** button. The **Statuses** pop up window will open.
 - c. Select ‘C’ for Canceled.
 - d. Choose Select. The change is automatic. You do not need to Save.

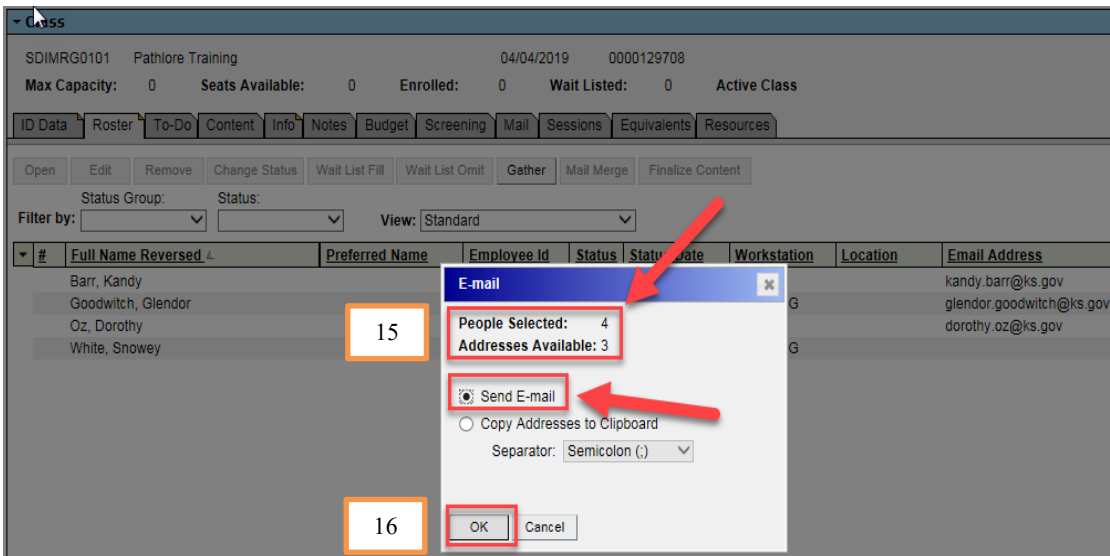


14. To send email notices to the participants informing them the class has been canceled, select the **E-mail** button at the bottom of the Roster screen.



15. The E-mail pop-up will open. Double check to see if the number of **People Selected** and the number of **Addresses Available** are the same number. If these numbers do not match you will need to double check that each registered participant has an email address. (you may check by scrolling right and looking under email address)

16. Select **OK**.



17. Your email service (i.e. Outlook) will open and populate with the email address of the selected participants, in the **To:** field.

18. If there is a person who was omitted in the **To:** of your email, manually add that person's email address.

NOTE: If you discover a person with an incorrect or missing email, please make the appropriate correction in the Person record. (See People Section of this manual)

17-18

To...

 Cc...

 Subject

19

We regret to inform you that Pathlore Training scheduled for 4/4/19 has been canceled due to inclement weather. At this time, no other class is scheduled. As soon as another class is scheduled, an announcement will be sent. We apologize for any inconvenience.

If you have any questions, please contact me at Robynn.Bears@ks.gov.

19. Continue by adding the message in the email.
20. **Notes tab:** Add a note, in the Notes section of the class. This information should include details about the cancellation as well as about an email being sent to those enrolled. Enter your name and the date of the entry. See example.

20

Administration Center

| | | | | | | |
|---------|--------|--------|---------------|-------------|-----------------|--------------|
| COURSES | GROUPS | PEOPLE | REGISTRATIONS | CURRICULUMS | CLASS RESOURCES | GAP ANALYSIS |
|---------|--------|--------|---------------|-------------|-----------------|--------------|

Class

SDIMRG0101 Pathlore Training 04/04/2019 0000129708

Max Capacity: 0 **Seats Available:** 0 **Enrolled:** 0 **Wait Listed:** 0 **Active Class**

| | | | | | | | | | | | |
|---------|--------|-------|---------|------|-------|--------|-----------|------|----------|-------------|-----------|
| ID Data | Roster | To-Do | Content | Info | Notes | Budget | Screening | Mail | Sessions | Equivalents | Resources |
|---------|--------|-------|---------|------|-------|--------|-----------|------|----------|-------------|-----------|

The 4/4/19 Class was postponed due to inclement weather. The reschedule date is 4/18/19.
 Requests were sent to those who originally enrolled, to see if they would like to attend on 4/18. RBears 4/5/19

Pathlore Administrator Manual

Section 4
Registration

Pathlore Registration

The registration process involves assigning a student a registration status in a given class. A student's status can change to reflect what occurred from the time the student was initially registered in a class, until the student completes the class, is cancelled from a class, or another status is assigned. Registration status consist of single character codes which show the status of a participant's registration at any given time. Each registration status is associated with one of these pre-defined statuses:

- C** Cancelled – status assigned to a student who has cancelled a registration
- E** Enrolled – status assigned to a student who is expected to attend a class
- F** Finished – status assigned to a student who successfully completed a class
- I** Incomplete – status assigned when a student does not complete all the requirements for a class
- N** No Show – status assigned to a student who didn't show up for a class or contact anyone of their absence prior to the start of the class
- P** In Progress – status assigned to show that a student is still in progress in an online class.
- S** Finished in another class group - status assigned to a student who started in the class, did not finish in the 1st class, but finished in a later class.
- T** Trainer/Leader –status assigned to a trainer or leader who does not want to occupy one of the seats in a training, but will attend the training
- U** Unmastered – status assigned to a student who has started an online class but has not mastered the content.
- V** Equivalent – status assigned to record that a person already has the knowledge being imparted within a class (came from another source).
- W** Wait Listed – status assigned to a student wanting to be enrolled in a class but there are no available slots in the class.
- X** Exempted – status assigned to exempt a person from the requirement of taking a class

DO NOT USE THESE STATUES:

- H** Hold
- M** Miscellaneous
- Q** Question/Unknown

When a student is registered in a class, a registration record is created. The registration record links the student and the class. The class appears on the student's training transcript and the student appears on the class roster.

NOTE: Once a person is enrolled in a class, in order to finish out a class, the status needs to be updated to a status which finishes the class (i.e., C, N, X).

The instructions in this section, provide steps to follow when registering people in classes in Pathlore, changing the status of an enrolled person or adding post class status update.

Registering a person/people in a class.

There are three options for registering people in classes:

Individual Enrollment

One person in a single class

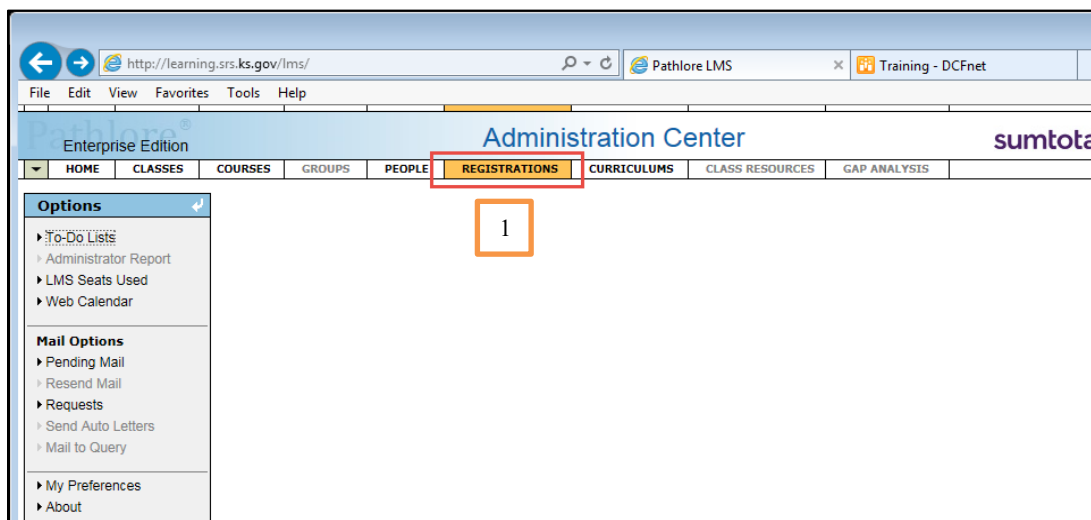
Batch Enrollment

Multiple people in a single class

Single person in multiple classes

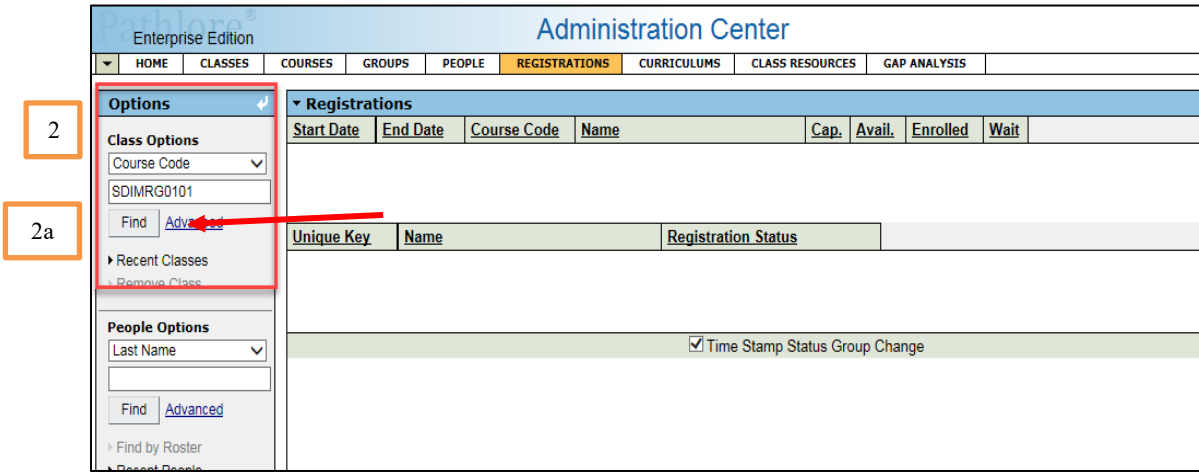
Individual Enrollment

1. Select **Registrations** from the Navigation bar.



2. Under **Class Options** in the Options box on the left side of the screen, select **Course Code** from the drop-down menu. Key in the Course Code number of the course you want to enroll the person in.
 - a. Select **Find**.

You may also search by other criteria such as start date, Class Name, etc.



Enterprise Edition Administration Center

HOME CLASSES COURSES GROUPS PEOPLE REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS

Options

Class Options

Course Code
SDIMRG0101

Find [Advanced](#)

Recent Classes
Remove Class

People Options

Last Name

Find [Advanced](#)

Find by Roster
Recent People

Registrations

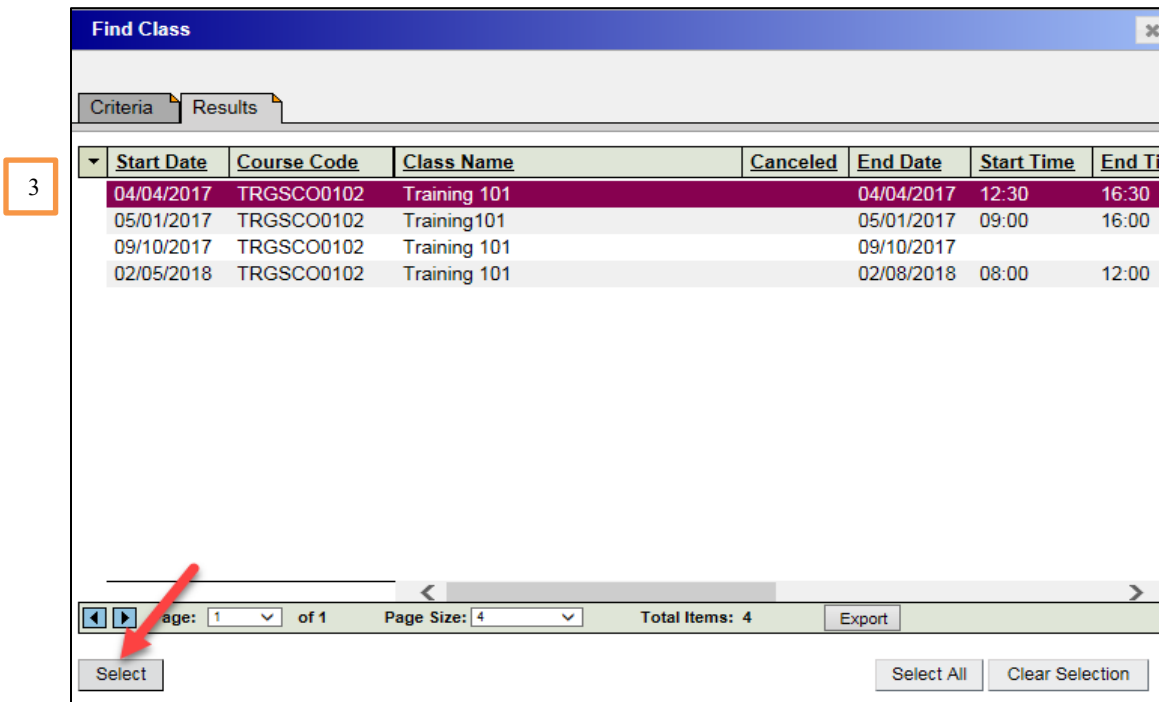
| Start Date | End Date | Course Code | Name | Cap. | Avail. | Enrolled | Wait |
|------------|----------|-------------|------|------|--------|----------|------|
| | | | | | | | |

Unique Key Name Registration Status

Time Stamp Status Group Change

NOTE: If there is only one class with that Course Code the Registration window will populate with that class. If there are multiple classes for that Course Code, the Find Class window will open.

- In the **Find Class** window, locate the correct class from the list, highlight it and then choose **Select** at the bottom left of the screen.



Find Class

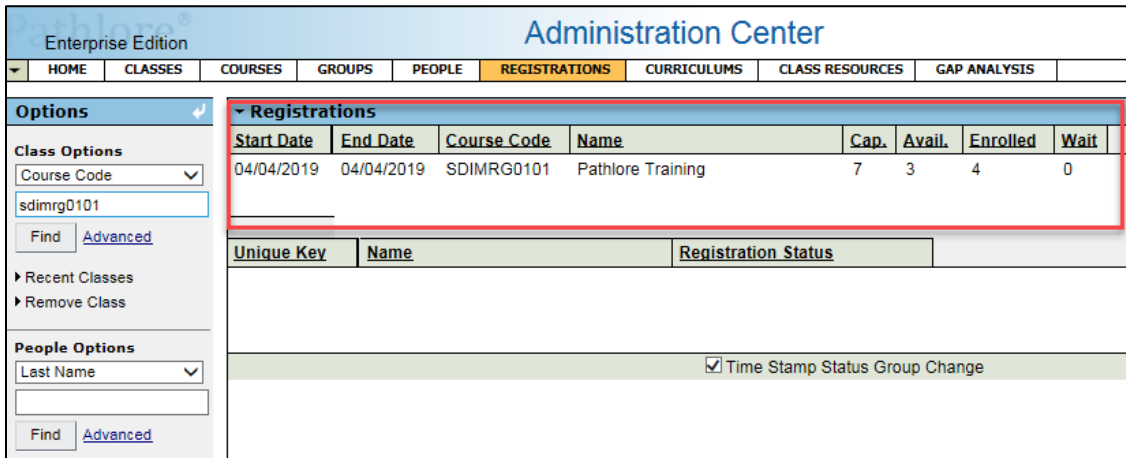
Criteria Results

| Start Date | Course Code | Class Name | Canceled | End Date | Start Time | End Time |
|------------|-------------|--------------|----------|------------|------------|----------|
| 04/04/2017 | TRGSCO0102 | Training 101 | | 04/04/2017 | 12:30 | 16:30 |
| 05/01/2017 | TRGSCO0102 | Training101 | | 05/01/2017 | 09:00 | 16:00 |
| 09/10/2017 | TRGSCO0102 | Training 101 | | 09/10/2017 | | |
| 02/05/2018 | TRGSCO0102 | Training 101 | | 02/08/2018 | 08:00 | 12:00 |

Page: 1 of 1 Page Size: 4 Total Items: 4 Export

Select Select All Clear Selection

Once you choose the Select button, the class opens in the **Registrations** window.

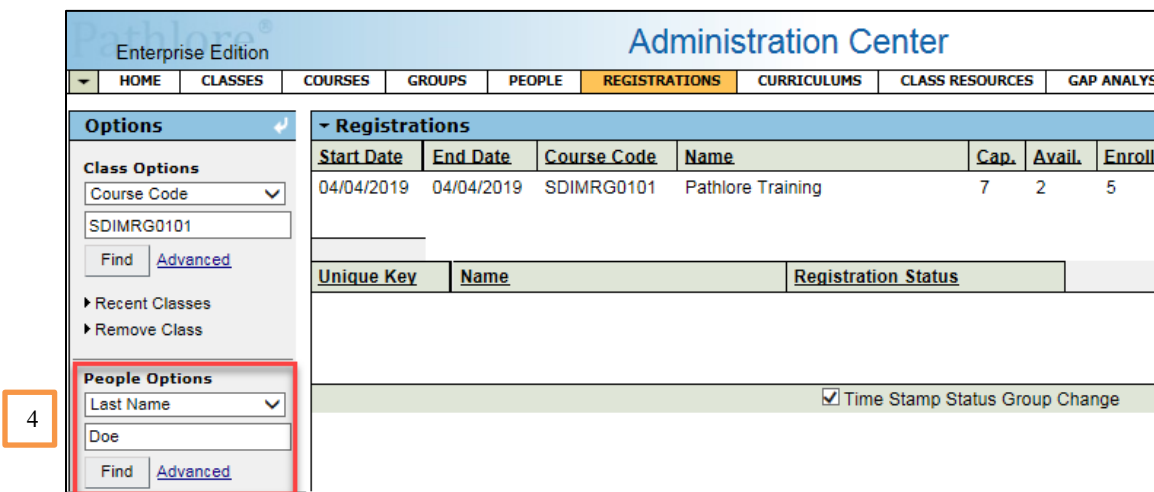


| Start Date | End Date | Course Code | Name | Cap. | Avail. | Enrolled | Wait |
|------------|------------|-------------|-------------------|------|--------|----------|------|
| 04/04/2019 | 04/04/2019 | SDIMRG0101 | Pathlore Training | 7 | 3 | 4 | 0 |

- Go to the **People Options** box on the left side of the screen. Use the drop-down arrow and select either **Employee ID** or **Last Name**. Key in the information based on the option you choose and select **Find**.

We will search by Last Name as our example:

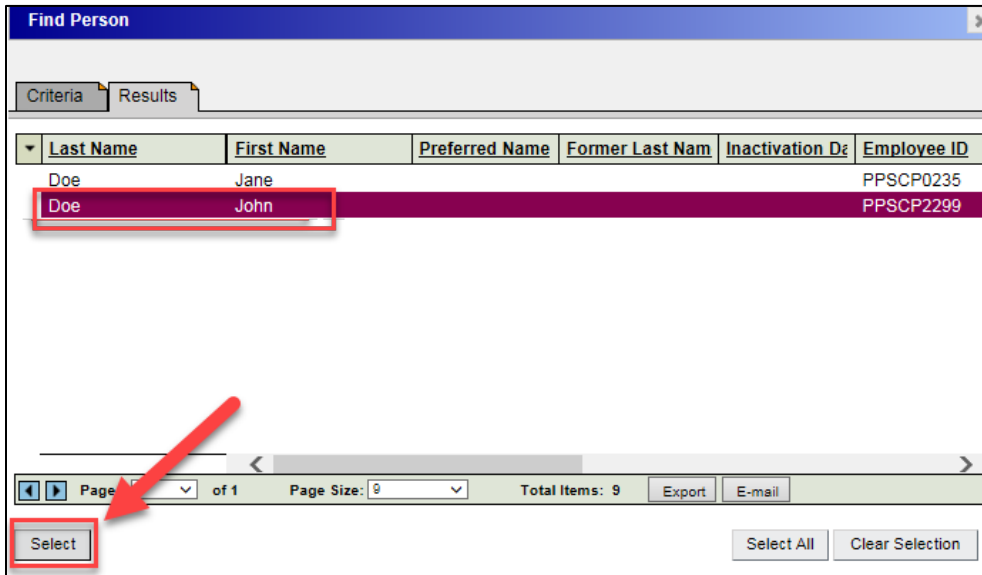
- In People Options, use the drop down and select **Last Name**.
- Enter the last name of the person you want to register in a class.
- Select **Find** right below where you entered the name.



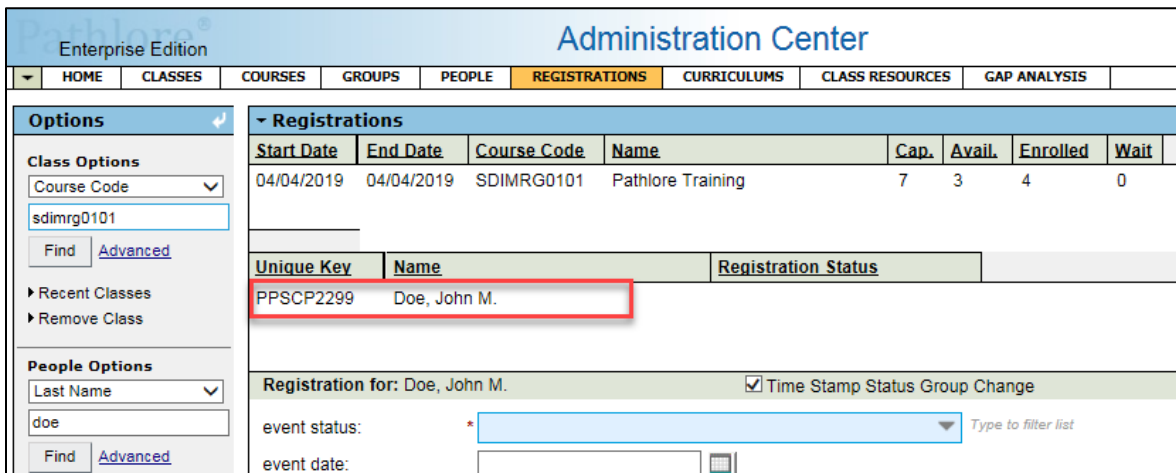
4

| Start Date | End Date | Course Code | Name | Cap. | Avail. | Enroll |
|------------|------------|-------------|-------------------|------|--------|--------|
| 04/04/2019 | 04/04/2019 | SDIMRG0101 | Pathlore Training | 7 | 2 | 5 |

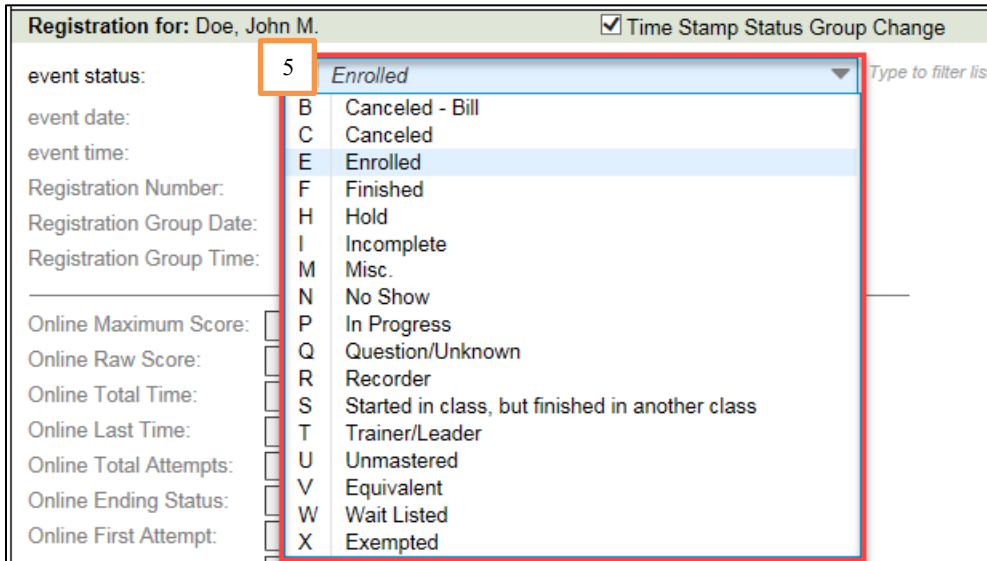
- d) The screen will populate with all persons of the last name you selected.
- e) Locate the correct person and highlight their name.
- f) Choose **Select** at the bottom left of the screen.



The person selected appears in the person window (below gray box with Unique Key/Name/Registration).



- Go to **event status** drop down box and select the status you wish to enter for this person.

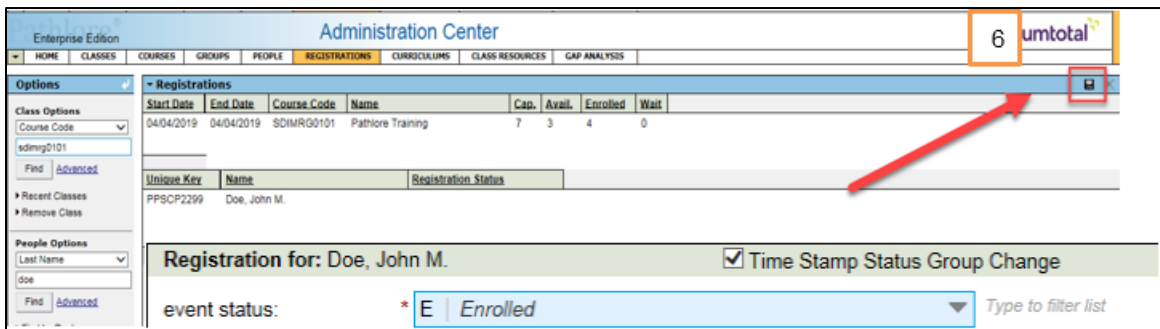


Registration for: Doe, John M. Time Stamp Status Group Change

event status: 5 **Enrolled** Type to filter list

- B Canceled - Bill
- C Canceled
- E **Enrolled**
- F Finished
- H Hold
- I Incomplete
- M Misc.
- N No Show
- P In Progress
- Q Question/Unknown
- R Recorder
- S Started in class, but finished in another class
- T Trainer/Leader
- U Unmastered
- V Equivalent
- W Wait Listed
- X Exempted

- Select the **Save** icon in the upper right corner on the toolbar.



Enterprise Edition Administration Center 6 umtotal

HOME CLASSES COURSES GROUPS PEOPLE REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS

Options **Registrations**

| Start Date | End Date | Course Code | Name | Cap. | Avail. | Enrolled | Wait |
|------------|------------|-------------|-------------------|------|--------|----------|------|
| 04/04/2019 | 04/04/2019 | SDIMRG0101 | Pathlore Training | 7 | 3 | 4 | 0 |

Unique Key Name Registration Status

PPSCP2299 Doe, John M.

Registration for: Doe, John M. Time Stamp Status Group Change

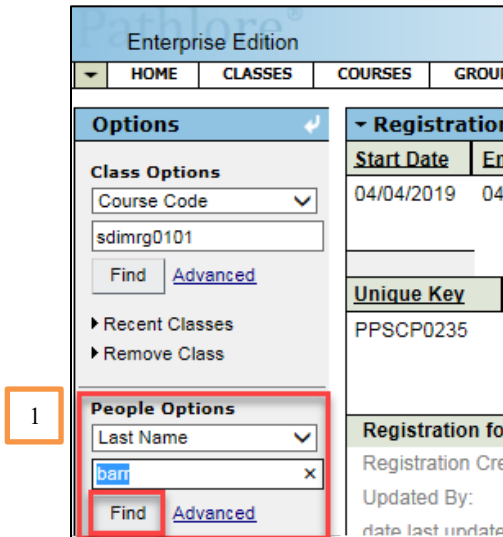
event status: * E **Enrolled** Type to filter list

Batch Enrollment

Multiple people in the same class.

Complete steps 1-6 above. Then continue to enroll additional participants by using the following steps:

- Under **People Options** enter the next person's **Employee ID** or **Last Name**. Select **Find**.



Enterprise Edition

HOME CLASSES COURSES GROUP

Options

Class Options

Course Code: sdimg0101

Find Advanced

Recent Classes

Remove Class

People Options

Last Name: Barr

Find Advanced

Registration

Start Date: 04/04/2019

Unique Key: PPSCP0235

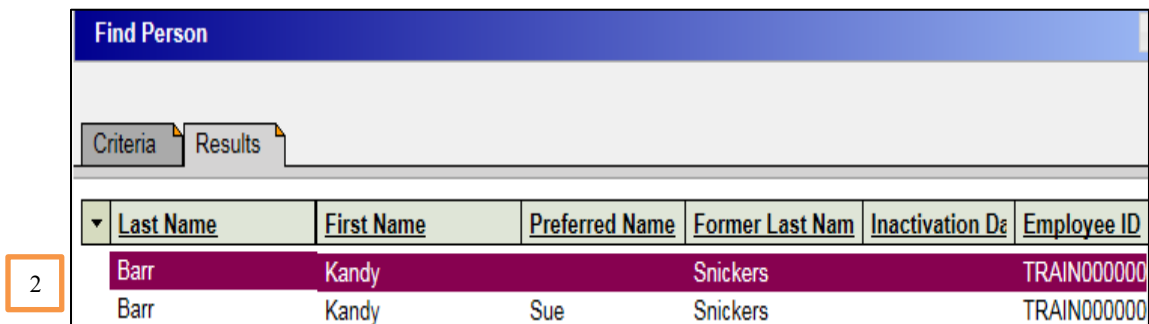
Registration for

Registration Cre

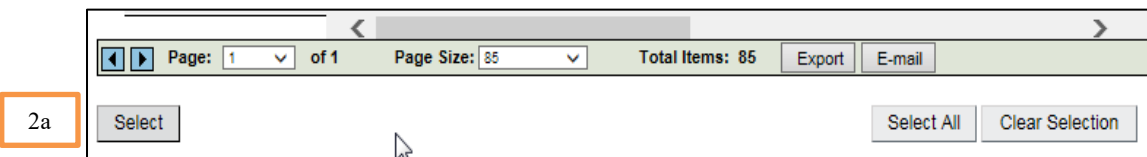
Updated By:

date last update

- Locate the next person you wish to enroll from the list that populates on the screen just as you did in the previous steps. Highlight the correct person.
 - Choose **Select** at the bottom left corner of the screen.



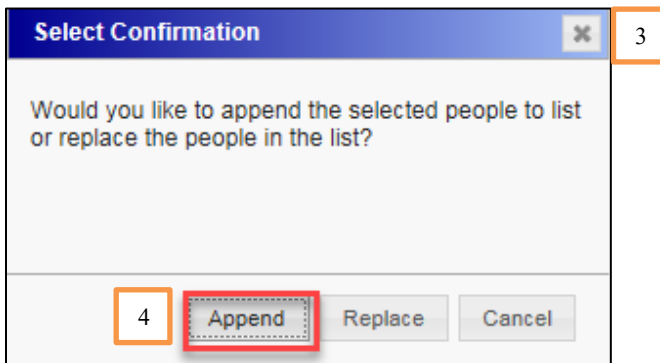
| Last Name | First Name | Preferred Name | Former Last Nam | Inactivation D | Employee ID |
|-----------|------------|----------------|-----------------|----------------|-------------|
| Barr | Kandy | | Snickers | | TRAIN000000 |
| Barr | Kandy | Sue | Snickers | | TRAIN000000 |



Page: 1 of 1 Page Size: 85 Total Items: 85 Export E-mail

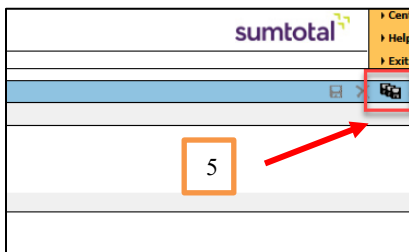
Select Select All Clear Selection

- A **Select Confirmation** box will pop up asking “Would you like to append the selected people to list or replace the people in the list?”
- Select **Append** to add the person to the class.



Repeat the previous two steps until all participants have been enrolled.

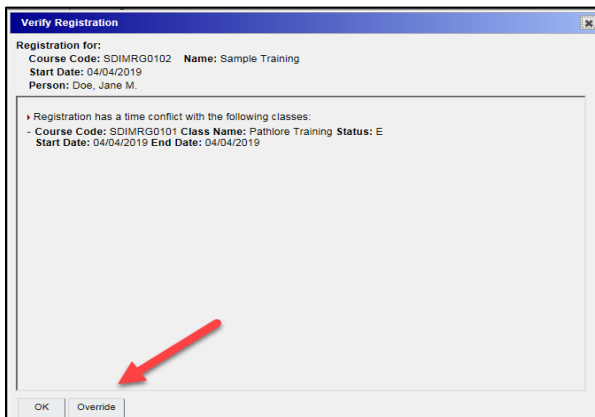
5. Once all participants are enrolled, you will need to save by selecting the triple batch save icon at the top right of the screen.



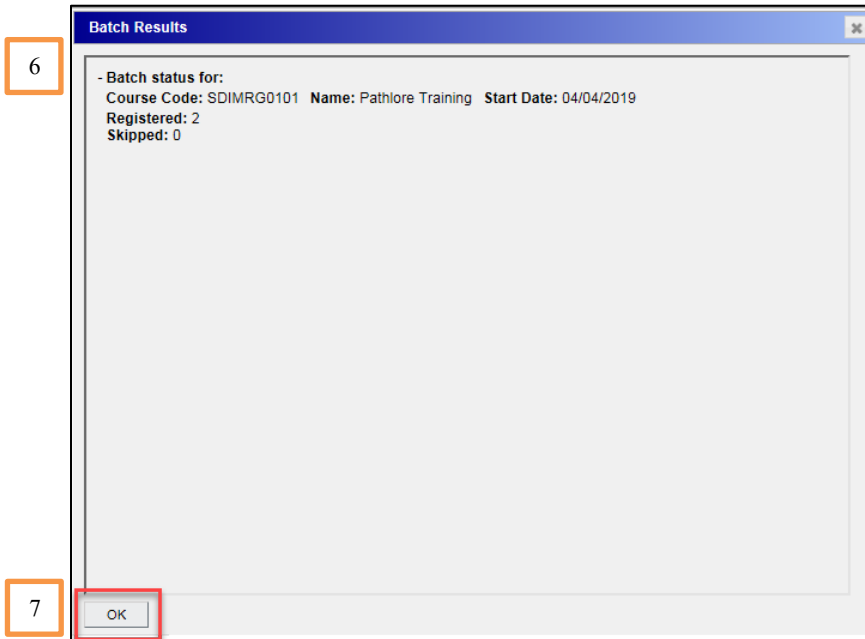
Should any individual you enrolled have any conflicts with the enrollment, you will receive a message about the conflict in the **Verify Registration** window. These conflict may be the person already completed the training or the time conflicts with something they are already enrolled in.

You have two options:

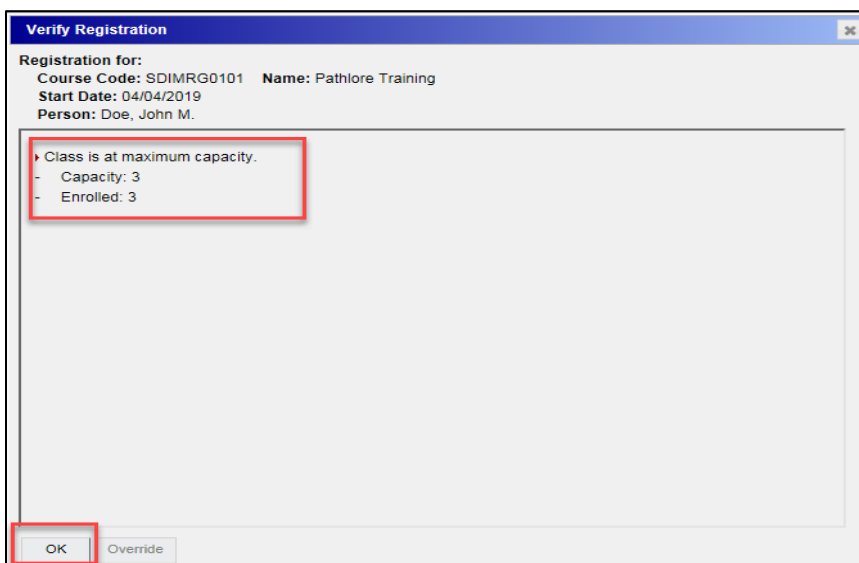
- a. To cancel out your request to enroll this person, due to the conflict, Select OK at the bottom of the screen.
- b. To Enroll this person in this class, even though there is a conflict, Select Override.



6. A **Batch Results** screen will pop up confirming the batch enrollment by indicating how many are enrolled and how many skipped. Double check that the numbers match the number you intended to enroll.
7. Select **OK** at the bottom of the pop-up screen.



NOTE: If you try to enroll a participant and the class reaches the assigned maximum capacity, a screen appears letting you know that the class reached capacity. Select **OK** to proceed. Any person over the maximum capacity **will not** be enrolled. The capacity will need to be increased before additional participants can be enrolled. See the example of this message below.

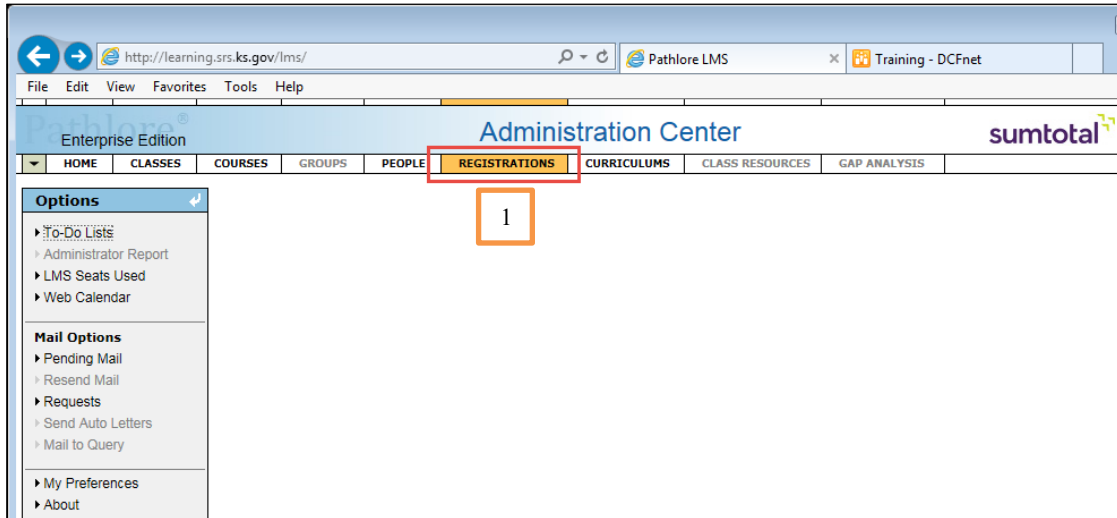


Batch Enrollment

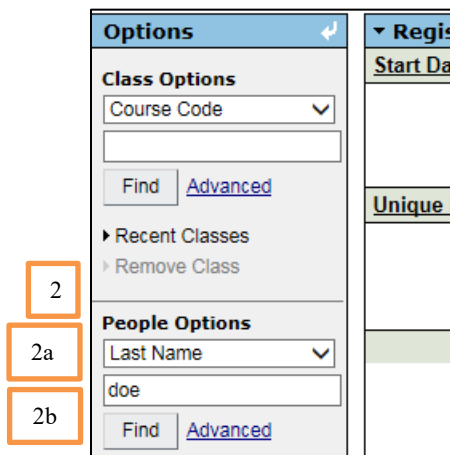
Single person in multiple classes.

Batch enrollment can also be used to enroll the same person in several different classes.

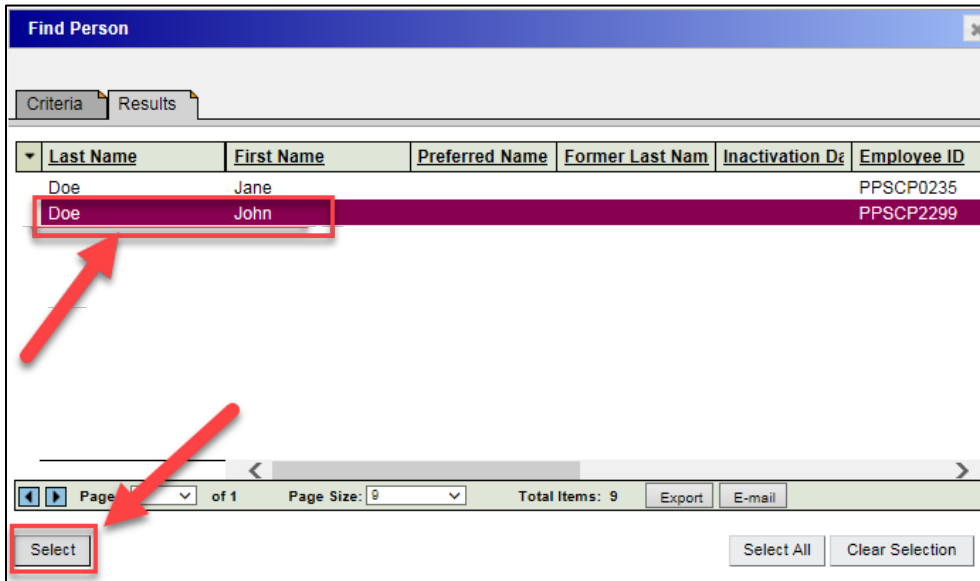
1. Select **Registrations** from menu bar.



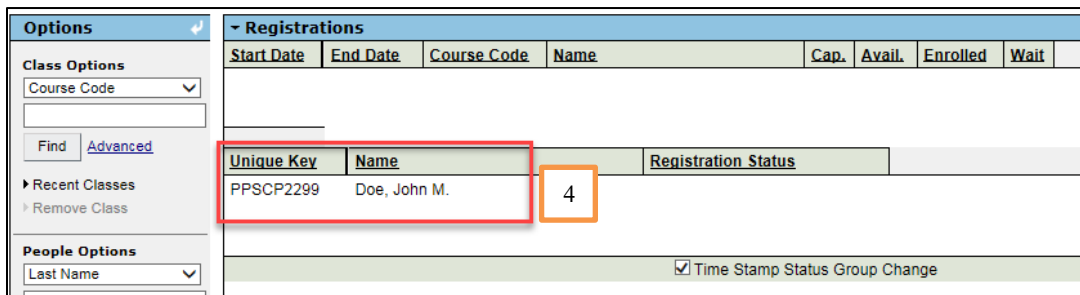
2. In the **Options** panel under **People Options** use the drop-down box to select **Employee ID** or **Last Name**.
 - a. Enter the Last Name of the person you want to enroll in multiple classes
 - b. Select **Find**.



3. Locate the person, highlight their name, and choose **Select** at the bottom of the screen (as in previous steps).

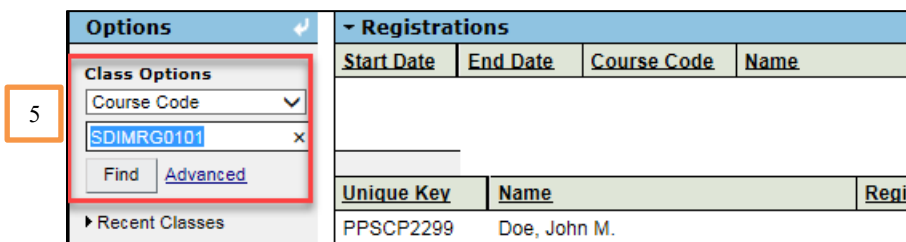


- The person selected will appear in the registration screen (below gray area Unique Key/Name/ Registration Status).

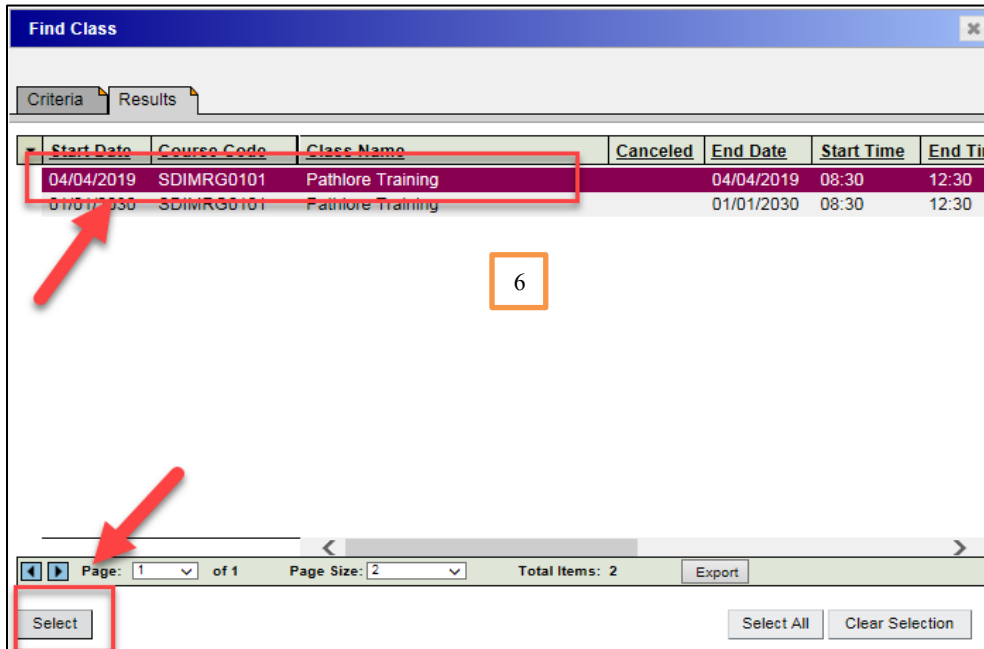


- Under **Class Options** in the Options panel use the drop-down and select **Course Code**. Enter the Course Code of the first class you wish to register the person in. Select **Find**.

NOTE: You may use other search options, but we are searching by Course Code in this example.



- The screen will populate with future classes of the Course Code selected. Highlight the correct class. Choose the **Select** button at the bottom left part of the screen.



Find Class

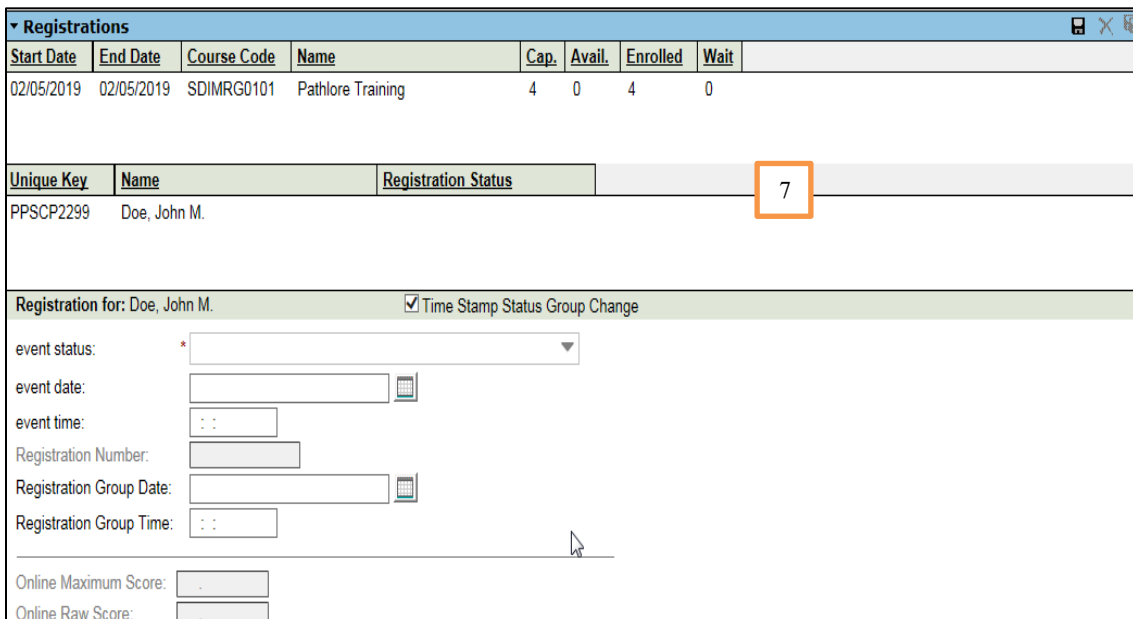
Criteria Results

| Start Date | Course Code | Class Name | Canceled | End Date | Start Time | End Time |
|------------|-------------|-------------------|----------|------------|------------|----------|
| 04/04/2019 | SDIMRG0101 | Pathlore Training | | 04/04/2019 | 08:30 | 12:30 |
| 01/01/2030 | SDIMRG0101 | Pathlore Training | | 01/01/2030 | 08:30 | 12:30 |

Page: 1 of 1 Page Size: 2 Total Items: 2 Export

Select Select All Clear Selection

7. The screen will open for you to enter the registration status.



Registrations

| Start Date | End Date | Course Code | Name | Cap. | Avail. | Enrolled | Wait |
|------------|------------|-------------|-------------------|------|--------|----------|------|
| 02/05/2019 | 02/05/2019 | SDIMRG0101 | Pathlore Training | 4 | 0 | 4 | 0 |

| Unique Key | Name | Registration Status |
|------------|--------------|---------------------|
| PPSCP2299 | Doe, John M. | |

Registration for: Doe, John M. Time Stamp Status Group Change

event status: *

event date:

event time:

Registration Number:

Registration Group Date:

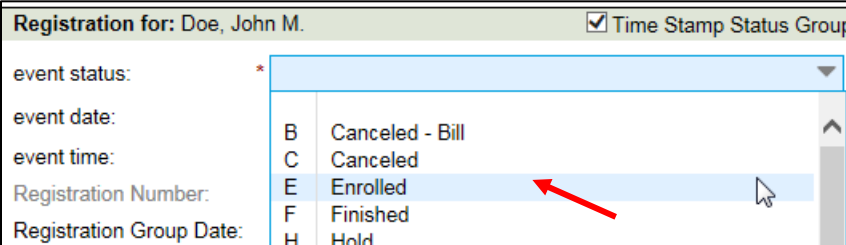
Registration Group Time:

Online Maximum Score:

Online Raw Score:

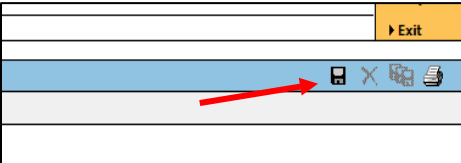
8. From the drop-down menu of the event status select E-Enroll.

8



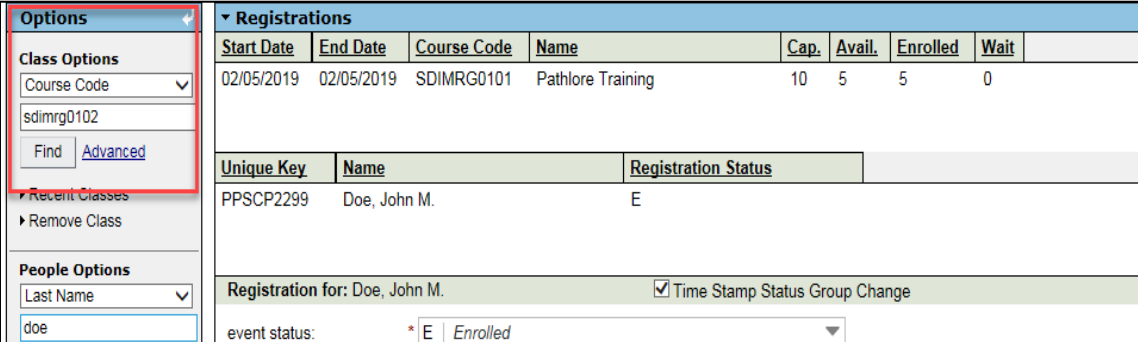
9. Select **Save** in the upper right-hand corner.

9



10. Return to **Class Options** in the Options panel on the left. Enter the next **Course Code** you wish to enroll the individual in. Select **Find**.

10

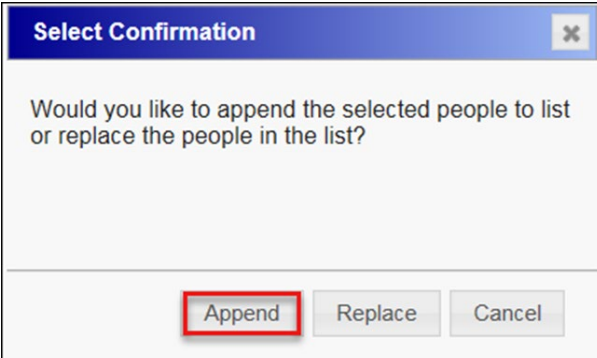


| Start Date | End Date | Course Code | Name | Cap. | Avail. | Enrolled | Wait |
|------------|------------|-------------|-------------------|------|--------|----------|------|
| 02/05/2019 | 02/05/2019 | SDIMRG0101 | Pathlore Training | 10 | 5 | 5 | 0 |

| Unique Key | Name | Registration Status |
|------------|--------------|---------------------|
| PPSCP2299 | Doe, John M. | E |

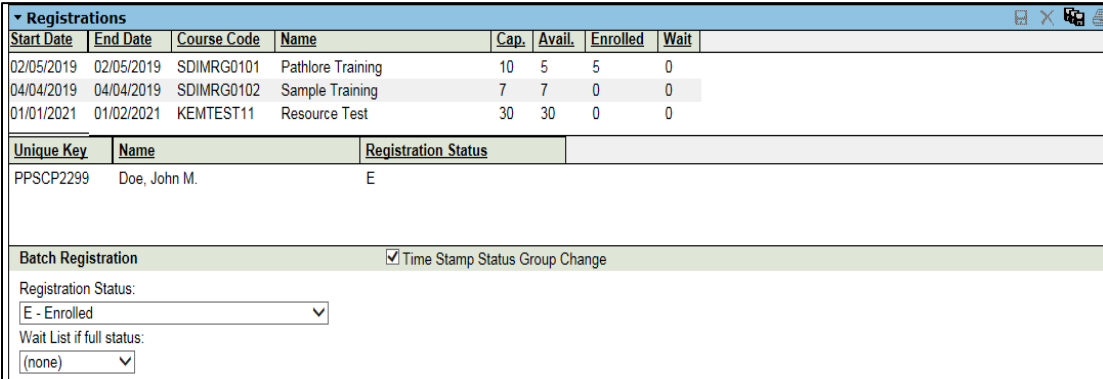
11. If multiple classes are available for the Course Code you chose, you will select the appropriate class as you did with the first class. If only one class is available a **Select Confirmation** screen will pop up asking if you want to Append, Replace or Cancel this class. Select **Append**.

11



- Continue to add any additional classes beginning with Step 10 until you have enrolled the individual in all classes.

12



| Start Date | End Date | Course Code | Name | Cap. | Avail. | Enrolled | Wait |
|------------|------------|-------------|-------------------|------|--------|----------|------|
| 02/05/2019 | 02/05/2019 | SDIMRG0101 | Pathlore Training | 10 | 5 | 5 | 0 |
| 04/04/2019 | 04/04/2019 | SDIMRG0102 | Sample Training | 7 | 7 | 0 | 0 |
| 01/01/2021 | 01/02/2021 | KEMTEST11 | Resource Test | 30 | 30 | 0 | 0 |

Unique Key: PPSCP2299, Name: Doe, John M., Registration Status: E

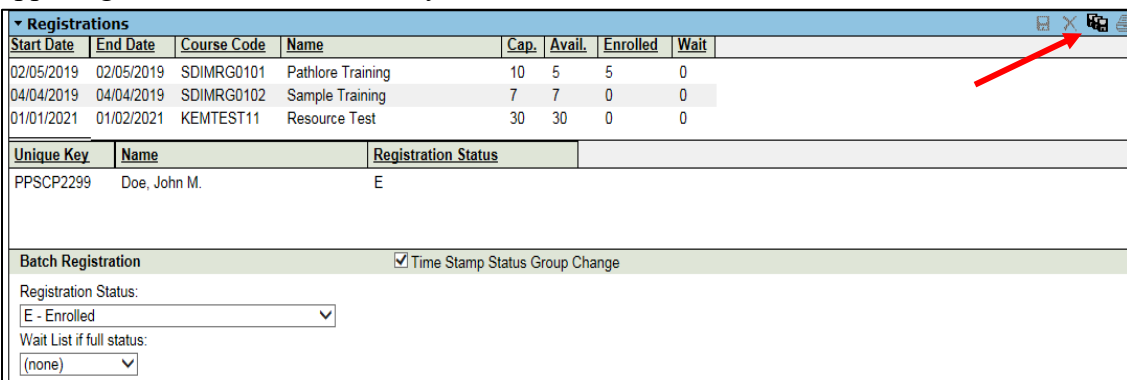
Batch Registration: Time Stamp Status Group Change

Registration Status:

Wait List if full status:

- Once you have completed the enrollment, select the Batch icon (three disk icon) in the upper right of the screen, to save your work.

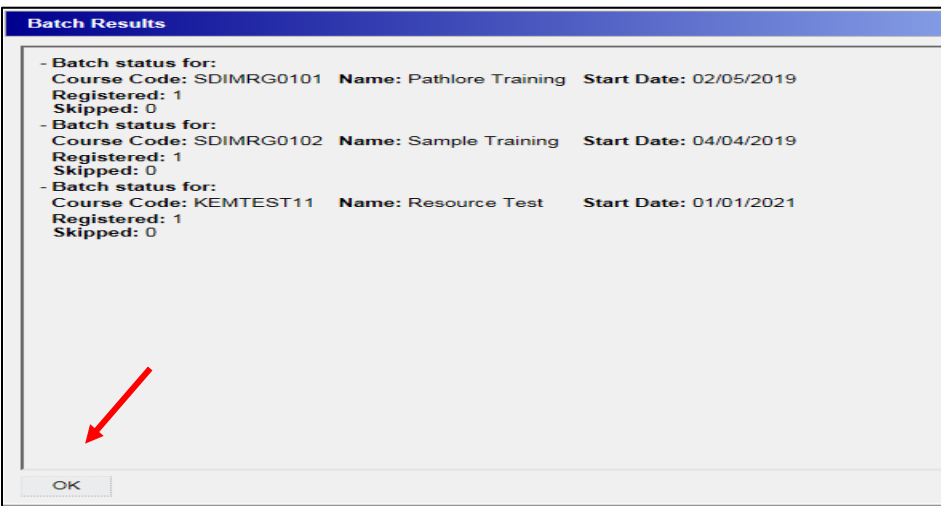
13



The screenshot is identical to the previous one, but with a red arrow pointing to the Batch icon (three disk icon) in the top right corner of the window title bar.

- The Batch Results screen will pop up showing the Batch status. If this information is correct, select OK at the bottom of the screen.

14



Batch Results

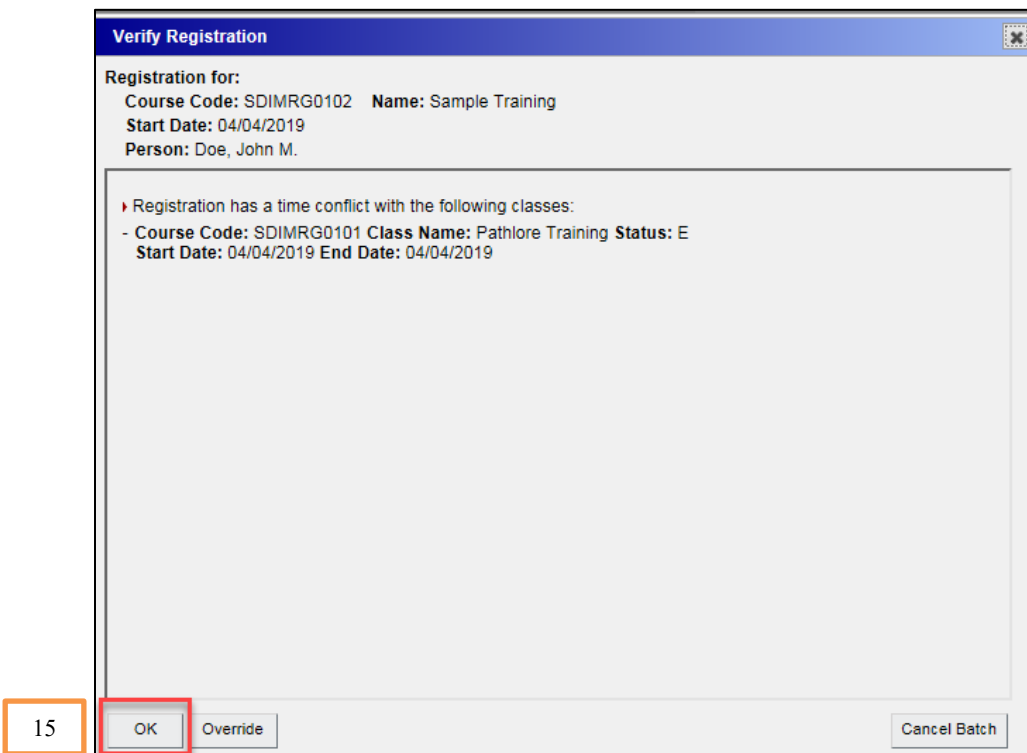
- Batch status for:
Course Code: SDIMRG0101 Name: Pathlore Training Start Date: 02/05/2019
Registered: 1
Skipped: 0
- Batch status for:
Course Code: SDIMRG0102 Name: Sample Training Start Date: 04/04/2019
Registered: 1
Skipped: 0
- Batch status for:
Course Code: KEMTEST11 Name: Resource Test Start Date: 01/01/2021
Registered: 1
Skipped: 0

OK

15. Should the individual you enrolled have any conflicts with the enrollment, you will receive a message about the conflict in the **Verify Registration** window. These conflict may be the person already completed the training or the time conflicts with something they are already enrolled in.

You have two options:

- a. To cancel out your request to enroll this person, due to the conflict, Select OK at the bottom of the screen.
- b. To Enroll this person in this class, even though there is a conflict, Select Override.



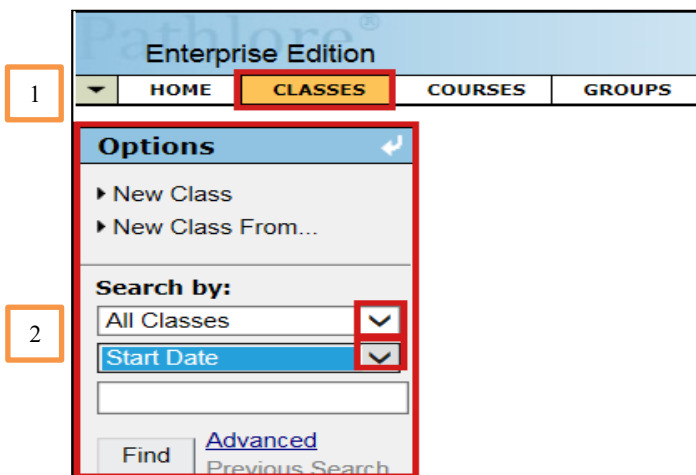
This will complete the Batch Enrollment process for enrolling a single person in multiple classes.

Registration Tip

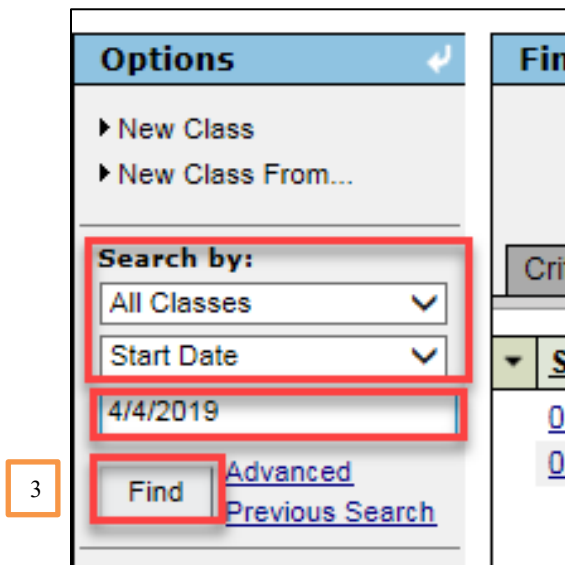
Occasionally, you may want to enroll several participants in several different trainings. To save keystrokes, a class roster from one training may be copied over to another class.

To copy a class roster over to another class:

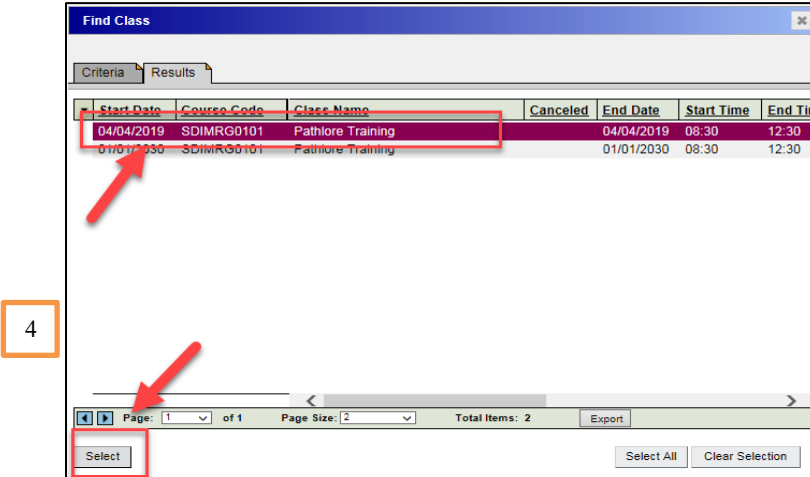
1. Select **Classes** from the menu bar.
2. In the **Options** panel, under **Search by**, select **Start Date** from the dropdown menu.



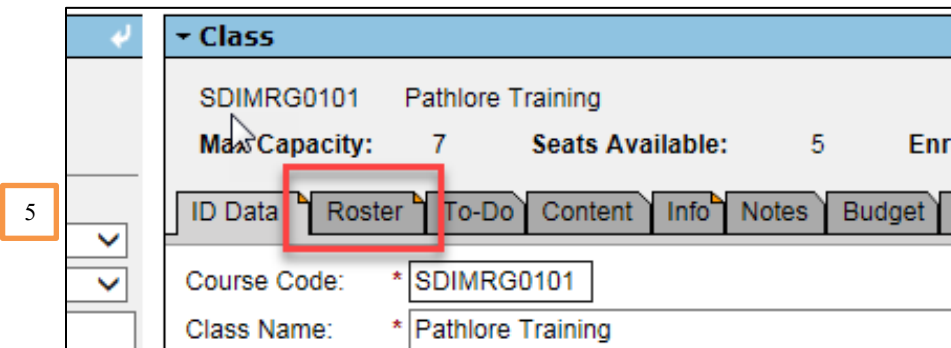
3. Enter the **Start Date** you are looking for (i.e. 4/4/19) and select **Find**.



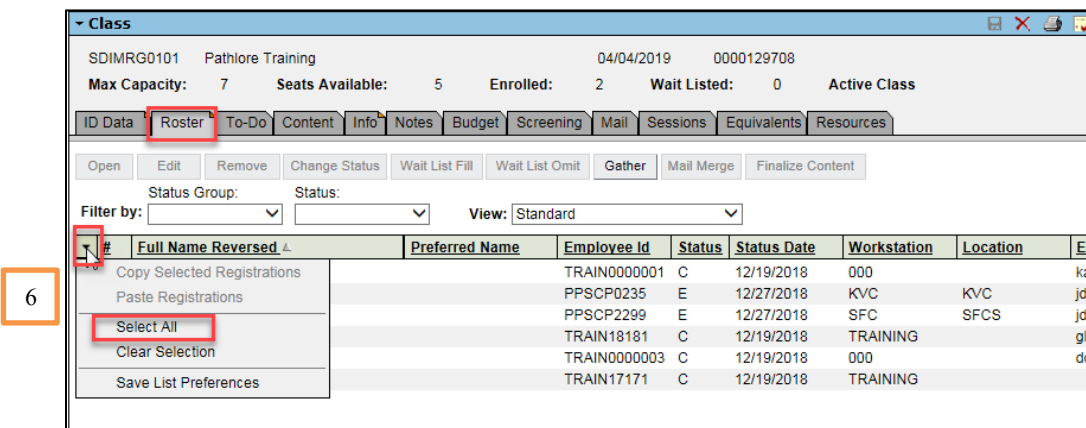
- Select the correct class from the search results by highlighting it. Then choose Select at the bottom left corner of the screen.



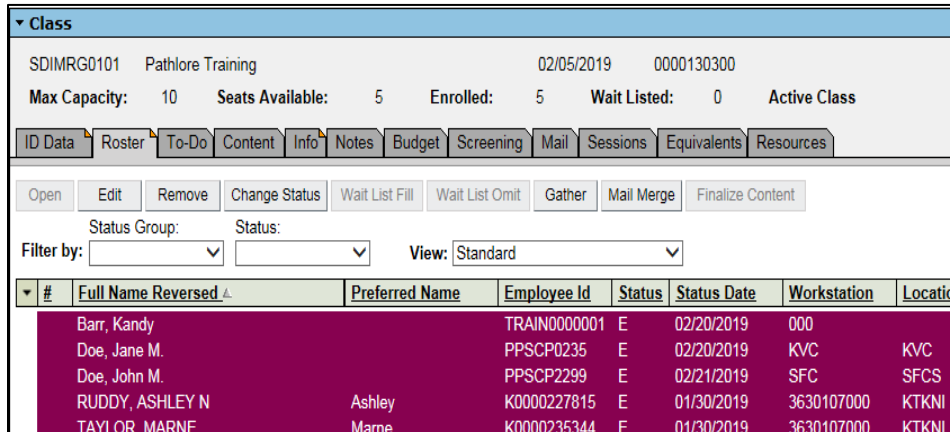
- From the **Class** screen, select the **Roster** tab.



- Use the arrow to the left of Full Name Reversed, and from the drop down choose Select All. You may use the Status Group and filter to only a particular status if you would like.

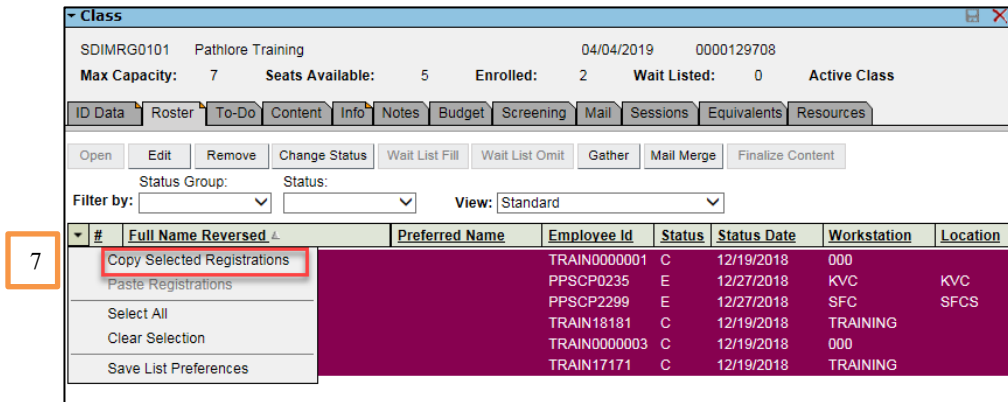


All names in the roster will be highlighted. NOTE: If there is a person or people you do not want to be registered, just hold down the Control key and deselect those you do not want.



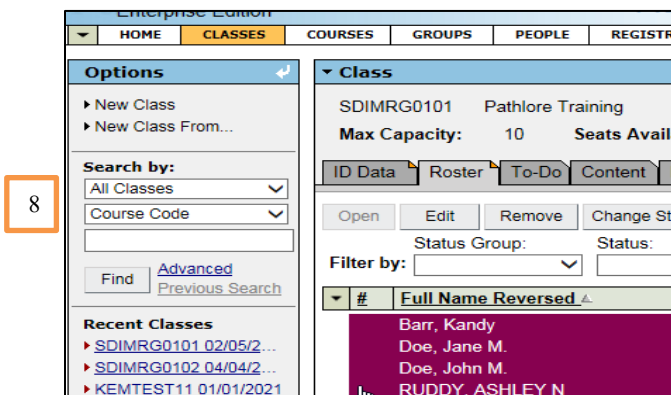
| # | Full Name Reversed | Preferred Name | Employee Id | Status | Status Date | Workstation | Location |
|---|--------------------|----------------|--------------|--------|-------------|-------------|----------|
| | Barr, Kandy | | TRAIN0000001 | E | 02/20/2019 | 000 | |
| | Doe, Jane M. | | PPSCP0235 | E | 02/20/2019 | KVC | KVC |
| | Doe, John M. | | PPSCP2299 | E | 02/21/2019 | SFC | SFCS |
| | RUDDY, ASHLEY N | Ashley | K0000227815 | E | 01/30/2019 | 3630107000 | KTKNI |
| | TAYLOR, MARNE | Marne | K0000235344 | F | 01/30/2019 | 3630107000 | KTKNI |

- Return to the arrow to the left of Full Name Reversed and choose Copy Selected Registrations.



| # | Full Name Reversed | Preferred Name | Employee Id | Status | Status Date | Workstation | Location |
|---|-----------------------------|----------------|--------------|--------|-------------|-------------|----------|
| | Copy Selected Registrations | | TRAIN0000001 | C | 12/19/2018 | 000 | |
| | Paste Registrations | | PPSCP0235 | E | 12/27/2018 | KVC | KVC |
| | Select All | | PPSCP2299 | E | 12/27/2018 | SFC | SFCS |
| | Clear Selection | | TRAIN18181 | C | 12/19/2018 | TRAINING | |
| | Save List Preferences | | TRAIN0000003 | C | 12/19/2018 | 000 | |
| | | | TRAIN17171 | C | 12/19/2018 | TRAINING | |

- From the Options panel, search for the class you want to copy registration of the participants into.



Options panel search filters:

- Search by: All Classes
- Course Code: []
- Find: []
- Advanced Search: []
- Previous Search: []

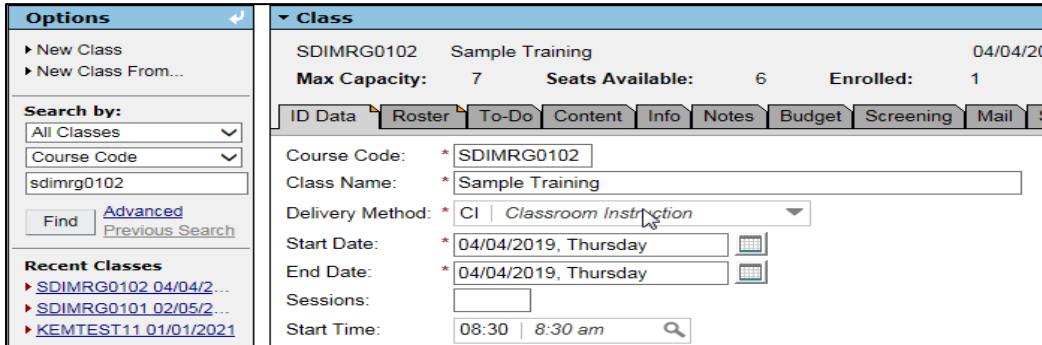
Recent Classes:

- SDIMRG0101 02/05/2...
- SDIMRG0102 04/04/2...
- KEMTEST11 01/01/2021

Class details:

SDIMRG0101 Pathlore Training
 Max Capacity: 10 Seats Available: []

- The selected class will open up. NOTE: If there are multiple classes you will need to select the appropriate class (as previously instructed).



Options

- ▶ New Class
- ▶ New Class From...

Search by:

All Classes (dropdown)
 Course Code (dropdown)
 sdimrg0102 (input)
 Find (button) [Advanced](#) [Previous Search](#)

Recent Classes

- ▶ SDIMRG0102 04/04/2...
- ▶ SDIMRG0101 02/05/2...
- ▶ KEMTEST11 01/01/2021

Class

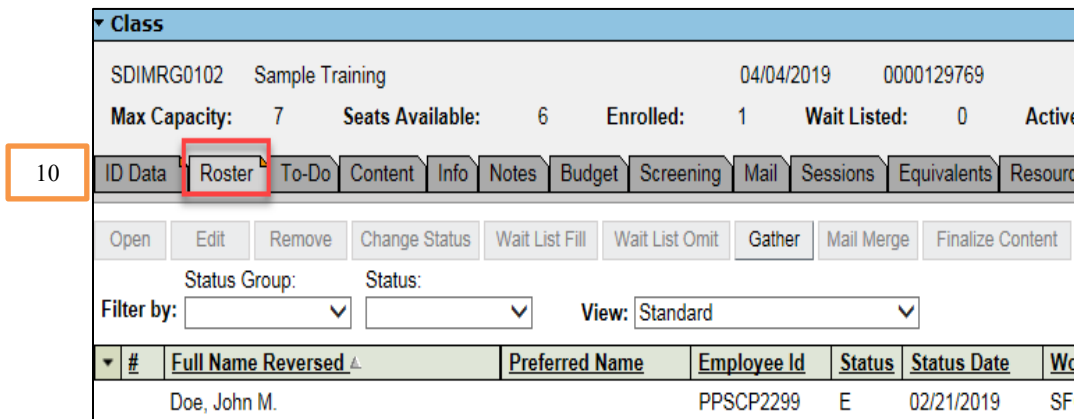
SDIMRG0102 Sample Training 04/04/2019

Max Capacity: 7 **Seats Available:** 6 **Enrolled:** 1

ID Data **Roster** To-Do Content Info Notes Budget Screening Mail S...

Course Code: * SDIMRG0102
 Class Name: * Sample Training
 Delivery Method: * CI | Classroom Instruction
 Start Date: * 04/04/2019, Thursday
 End Date: * 04/04/2019, Thursday
 Sessions:
 Start Time: 08:30 | 8:30 am

- Select the Roster Tab.



Class

SDIMRG0102 Sample Training 04/04/2019 0000129769

Max Capacity: 7 **Seats Available:** 6 **Enrolled:** 1 **Wait Listed:** 0 **Active**

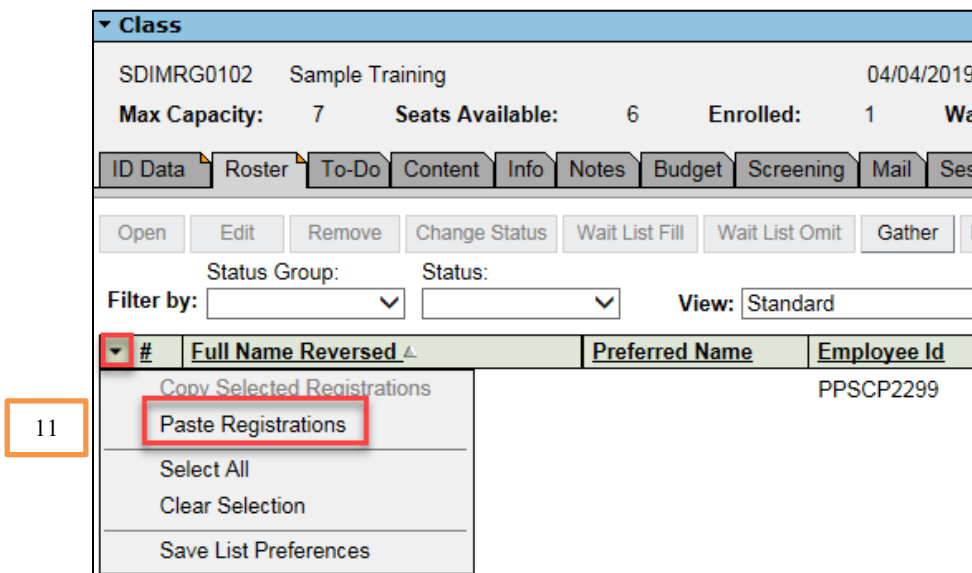
10 ID Data **Roster** To-Do Content Info Notes Budget Screening Mail Sessions Equivalents Resource

Open Edit Remove Change Status Wait List Fill Wait List Omit Gather Mail Merge Finalize Content

Status Group: Status: Filter by: View: Standard

| # | Full Name Reversed ▲ | Preferred Name | Employee Id | Status | Status Date | Wa |
|---|----------------------|----------------|-------------|--------|-------------|----|
| | Doe, John M. | | PPSCP2299 | E | 02/21/2019 | SF |

- Use the arrow to the left of Full Name Reversed and select Paste Registrations.



Class

SDIMRG0102 Sample Training 04/04/2019

Max Capacity: 7 **Seats Available:** 6 **Enrolled:** 1 **Wai**

ID Data **Roster** To-Do Content Info Notes Budget Screening Mail Sess

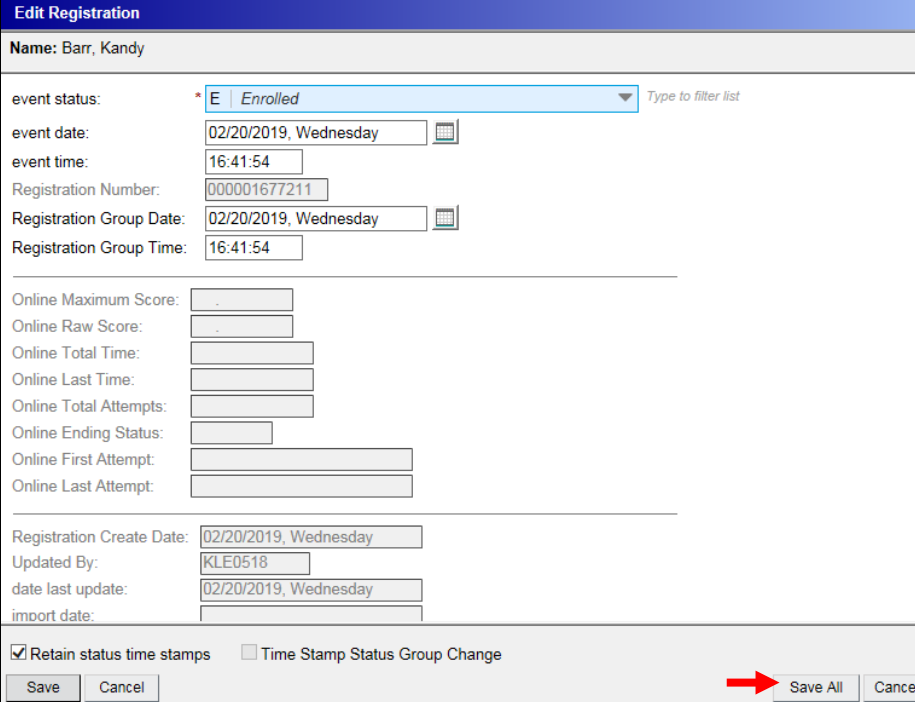
Open Edit Remove Change Status Wait List Fill Wait List Omit Gather M

Status Group: Status: Filter by: View: Standard

| # | Full Name Reversed ▲ | Preferred Name | Employee Id |
|---|----------------------|----------------|-------------|
| | | | PPSCP2299 |

11 Copy Selected Registrations
Paste Registrations
 Select All
 Clear Selection
 Save List Preferences

12. An **Edit Registration** window will pop up. You may edit each individual enrollment by selecting the Save button at the bottom left side of the window. Or you may save all enrollments by choosing Save All at the bottom right side of the window.



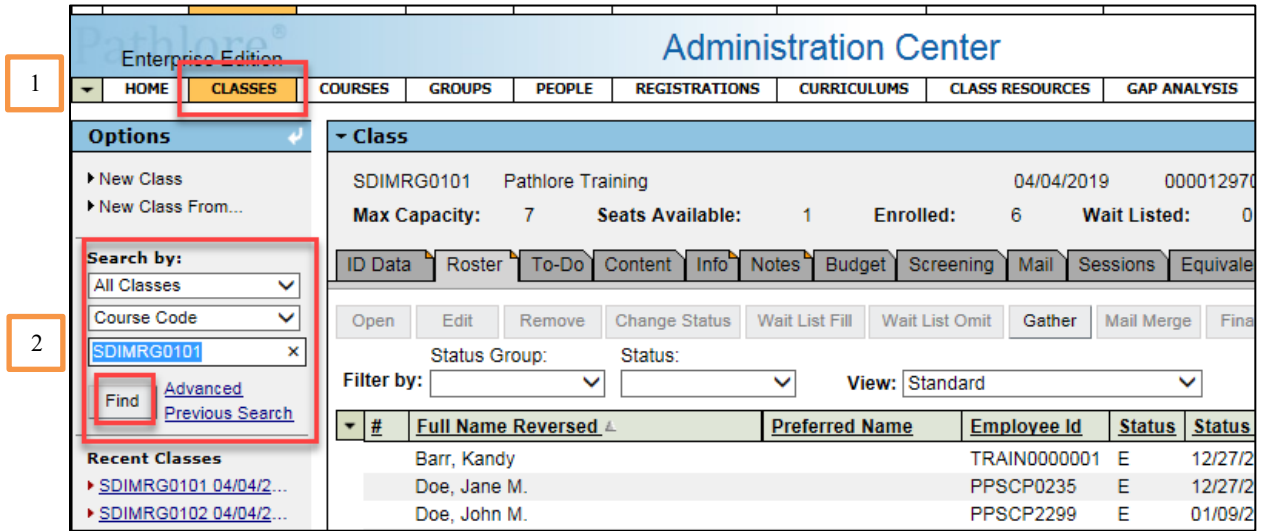
Cancel Registration Prior to Class Start

There are two options for cancelling a person's registration for a class; by changing a status in the class they are registered or going to the person's transcript and cancelling a registration.

Cancelling a Registration through a Class- There are a couple of ways to find the class you wish to cancel.

Option One: Selecting a Class by Course Code.

1. Select the **Classes** tab from the menu bar.
2. In the **Options** panel, locate **Search by:** and choose **All Classes** from the drop down. In the second box below **Search by:** choose **Course Code** from the drop down. Enter the Course Code in the third field. Select **Find**.



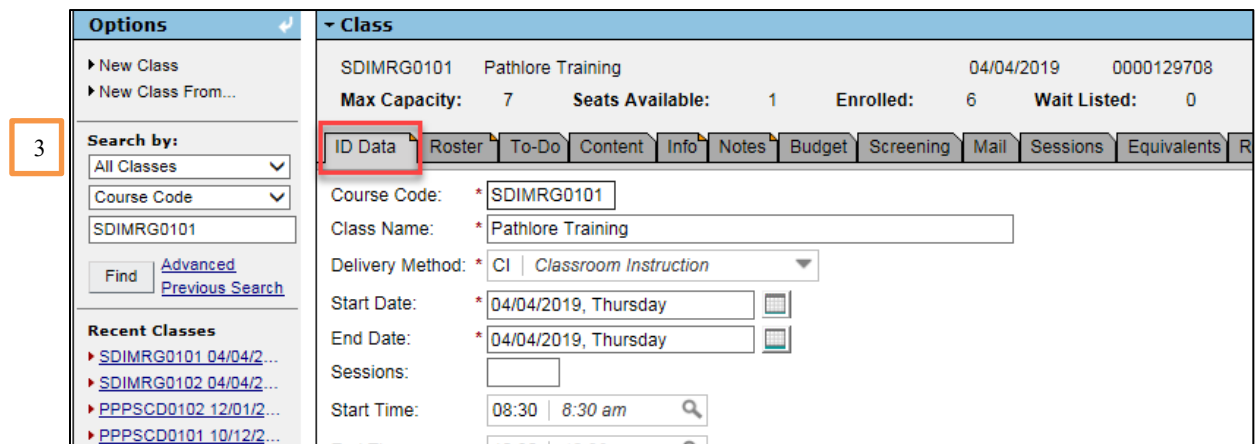
1. The 'CLASSES' menu item is highlighted in the top navigation bar.

2. The search options are shown in the left sidebar. The 'Search by:' dropdown is set to 'All Classes', and the 'Course Code' dropdown is set to 'SDIMRG0101'. The 'Find' button is highlighted.

The main content area shows the 'Class' details for SDIMRG0101 Pathlore Training, including Max Capacity (7), Seats Available (1), Enrolled (6), and Wait Listed (0). A table of enrolled students is visible below:

| # | Full Name Reversed | Preferred Name | Employee Id | Status | Status |
|---|--------------------|----------------|--------------|--------|---------|
| | Barr, Kandy | | TRAIN0000001 | E | 12/27/2 |
| | Doe, Jane M. | | PPSCP0235 | E | 12/27/2 |
| | Doe, John M. | | PPSCP2299 | E | 01/09/2 |

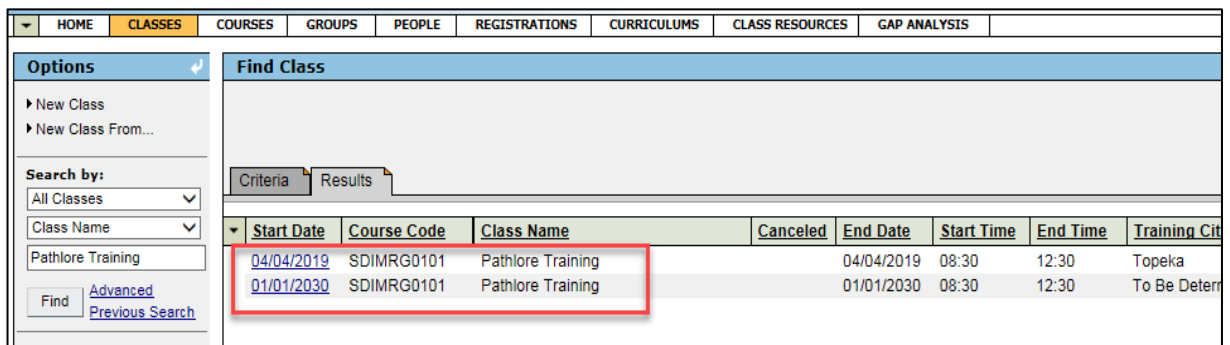
3. If there is only one class, the screen will automatically populate the ID Data section for that class.



3. The 'ID Data' tab is selected, showing the following details for class SDIMRG0101:

- Course Code: SDIMRG0101
- Class Name: Pathlore Training
- Delivery Method: CI | Classroom Instruction
- Start Date: 04/04/2019, Thursday
- End Date: 04/04/2019, Thursday
- Sessions: [Empty]
- Start Time: 08:30 | 8:30 am

If there is more than one class a list will open. Select the correct class by clicking on the date for that class. The class information will populate on the screen.

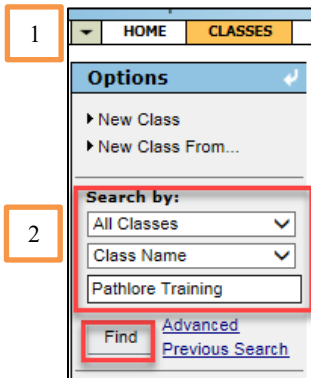


The 'Find Class' search results are displayed in a table:

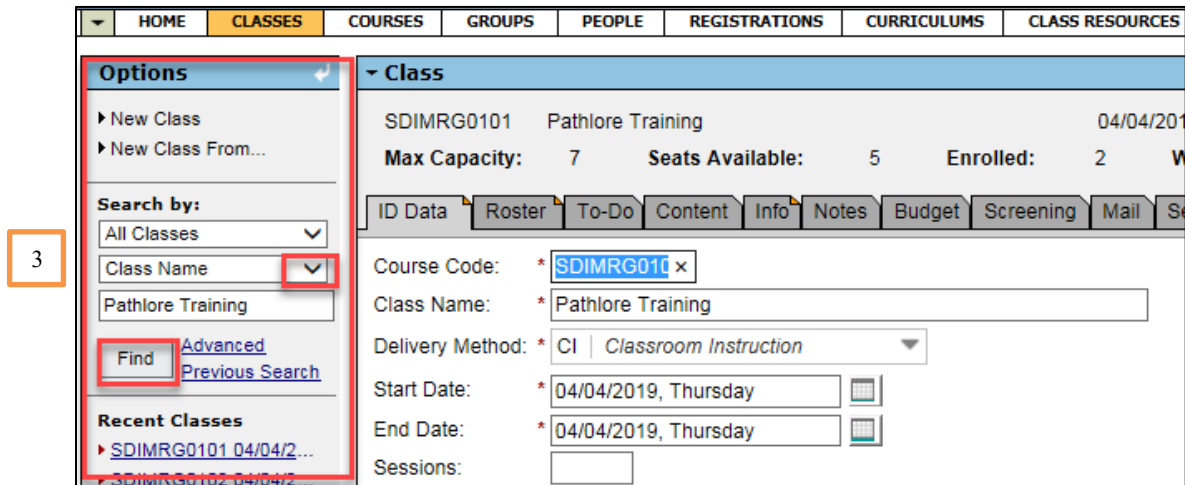
| Start Date | Course Code | Class Name | Canceled | End Date | Start Time | End Time | Training City |
|------------|-------------|-------------------|----------|------------|------------|----------|------------------|
| 04/04/2019 | SDIMRG0101 | Pathlore Training | | 04/04/2019 | 08:30 | 12:30 | Topeka |
| 01/01/2030 | SDIMRG0101 | Pathlore Training | | 01/01/2030 | 08:30 | 12:30 | To Be Determined |

Option Two: Selecting a Class by Class Name

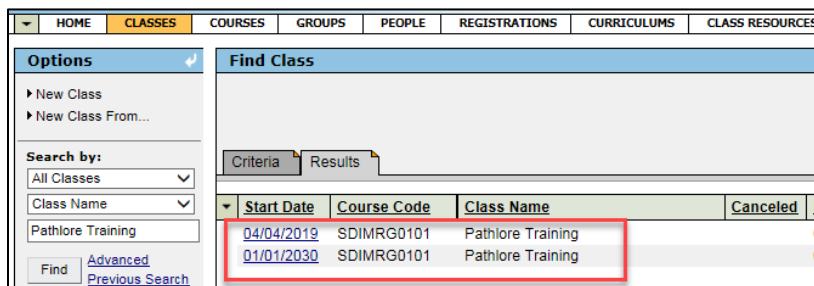
1. Select the **Classes** tab from the menu bar.
2. In the **Options** panel, locate **Search by:** and choose **All Classes** from the drop down. In the second box below **Search by:** choose **Class Name** from the drop down. Enter the class name in the third field. Select **Find**.



3. If there is only one class rather than a list, the screen will automatically populate the ID Data section with the class information.

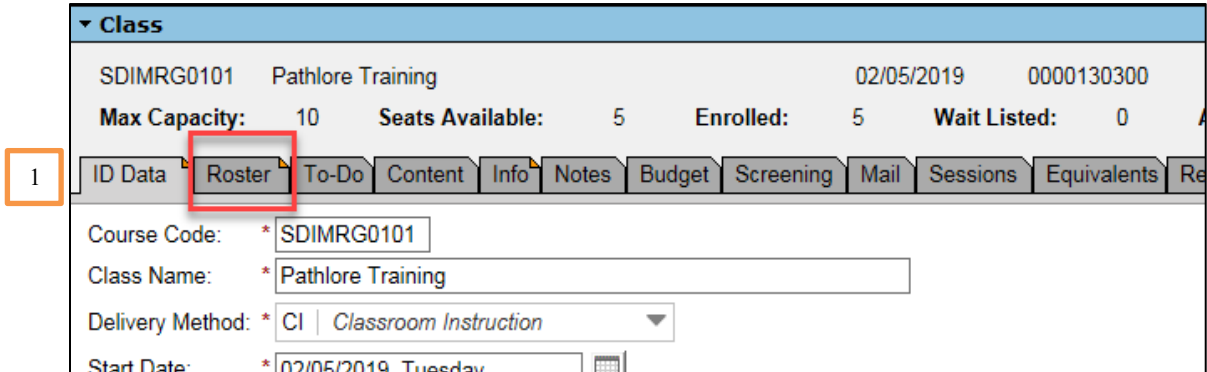


If there is more than one class a list will open. Select the correct class by clicking on the date for that class. The class information will populate on the screen



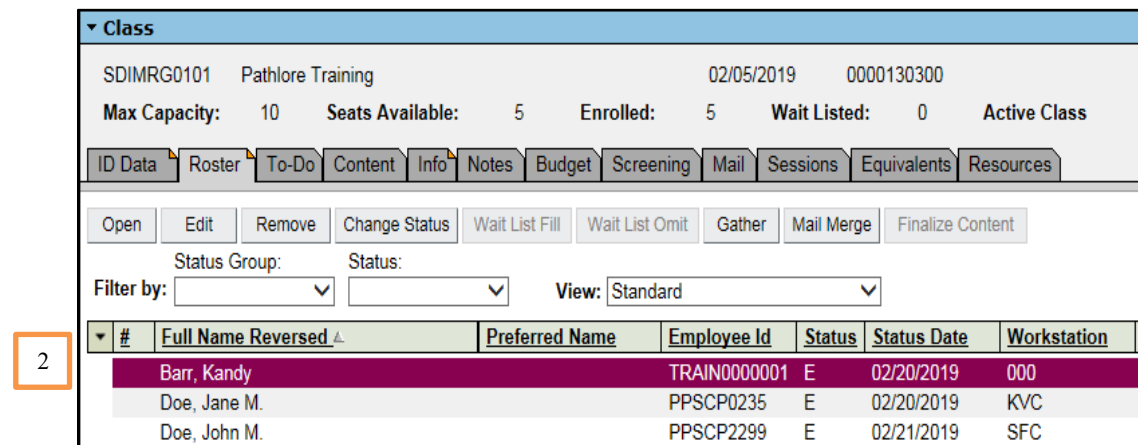
Once you have the correct class:

1. Select the Roster Tab.



The screenshot shows the 'Class' interface for class SDIMRG0101. The 'Roster' tab is highlighted with a red box and labeled with a '1' in an orange box. Below the tabs, the course details are visible: Course Code: *SDIMRG0101, Class Name: *Pathlore Training, Delivery Method: *CI | Classroom Instruction, and Start Date: *02/05/2019. Summary statistics show Max Capacity: 10, Seats Available: 5, Enrolled: 5, and Wait Listed: 0.

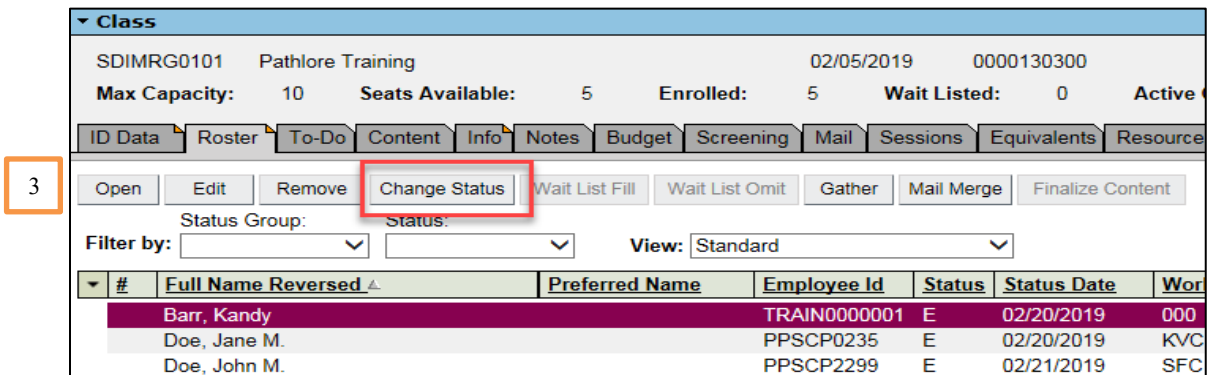
2. Highlight the person to be **Cancelled**.



The screenshot shows the Roster tab with a table of enrolled students. The first row, 'Barr, Kandy', is highlighted in purple and labeled with a '2' in an orange box. The table has columns for #, Full Name Reversed, Preferred Name, Employee Id, Status, Status Date, and Workstation.

| # | Full Name Reversed | Preferred Name | Employee Id | Status | Status Date | Workstation |
|---|--------------------|----------------|--------------|--------|-------------|-------------|
| | Barr, Kandy | | TRAIN0000001 | E | 02/20/2019 | 000 |
| | Doe, Jane M. | | PPSCP0235 | E | 02/20/2019 | KVC |
| | Doe, John M. | | PPSCP2299 | E | 02/21/2019 | SFC |

3. Select the **Change Status** button on the menu bar. A Statuses window will pop up.



The screenshot shows the Roster tab with the 'Change Status' button highlighted by a red box and labeled with a '3' in an orange box. The button is located in the menu bar above the student table.

4. Highlight **Canceled**.

4

| Statuses | |
|----------|------------------|
| Value | Description |
| B | Canceled - Bill |
| C | Canceled |
| E | Enrolled |
| F | Finished |
| H | Hold |
| I | Incomplete |
| M | Misc. |
| N | No Show |
| P | In Progress |
| Q | Question/Unknown |

Select Cancel Time Stamp Status Group Change

- Choose the **Select** button.

5

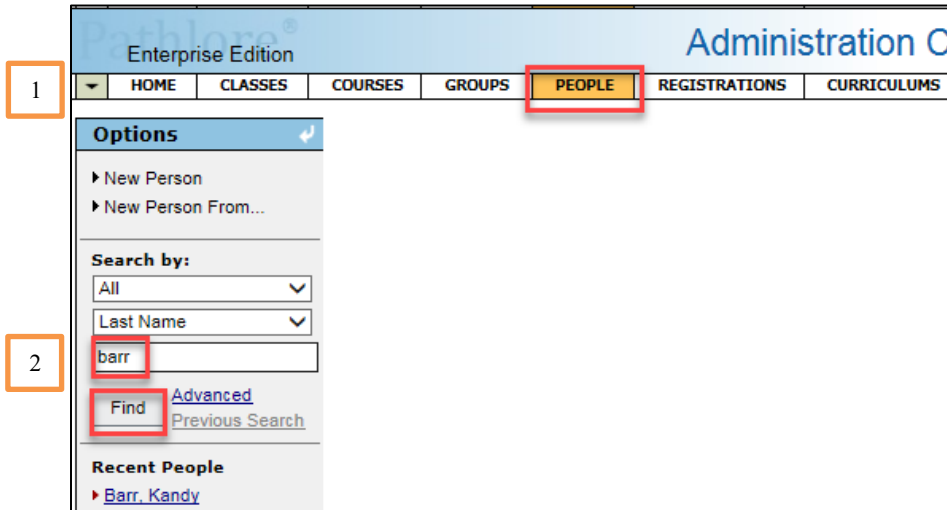
| Statuses | |
|----------|------------------|
| Value | Description |
| B | Canceled - Bill |
| C | Canceled |
| E | Enrolled |
| F | Finished |
| H | Hold |
| I | Incomplete |
| M | Misc. |
| N | No Show |
| P | In Progress |
| Q | Question/Unknown |

Select Cancel Time Stamp Status Group Change

The system automatically saves the changes.

Cancelling a Registration using Person's Transcript

- Select the **People** Tab.
- In the **Options** panel, locate **Search by:** and choose **All** from the drop down. In the second box below **Search by:** choose **Last Name** from the drop down. Enter the last name of the person in the third field. Select **Find**.



Enterprise Edition Administration Center

1 HOME CLASSES COURSES GROUPS **PEOPLE** REGISTRATIONS CURRICULUMS

Options

- ▶ New Person
- ▶ New Person From...

Search by:

All

Last Name

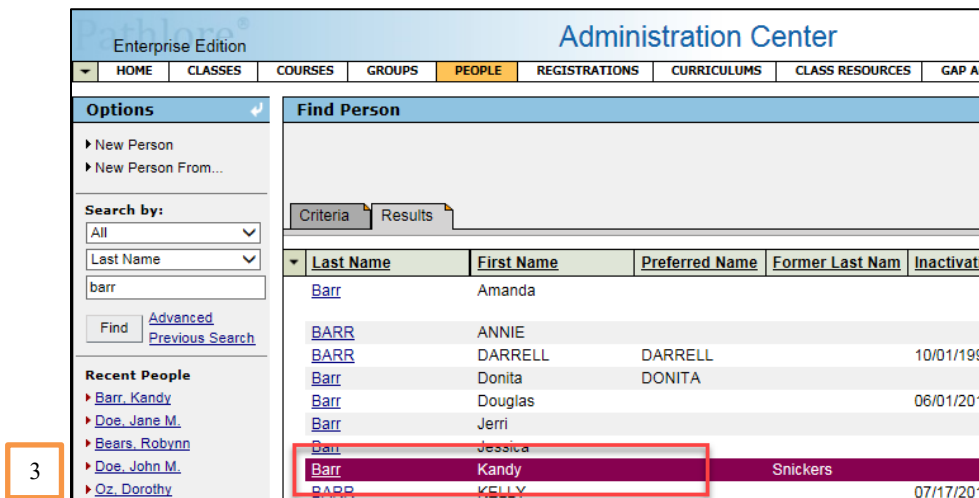
barr

Find Advanced Previous Search

Recent People

- ▶ Barr, Kandy

3. Click on the last name of the person you wish to change the registration for.



Enterprise Edition Administration Center

HOME CLASSES COURSES GROUPS **PEOPLE** REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS

Options

- ▶ New Person
- ▶ New Person From...

Search by:

All

Last Name

barr

Find Advanced Previous Search

Recent People

- ▶ Barr, Kandy
- ▶ Doe, Jane M.
- ▶ Bears, Robynn
- ▶ Doe, John M.
- ▶ Oz, Dorothy

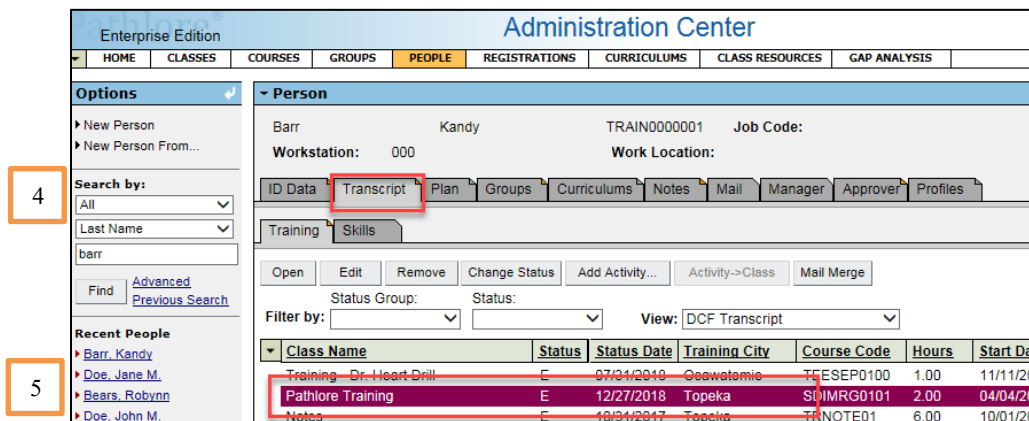
Find Person

Criteria Results

| Last Name | First Name | Preferred Name | Former Last Nam | Inactivat |
|-----------|------------|----------------|-----------------|-----------|
| Barr | Amanda | | | |
| BARR | ANNIE | | | |
| BARR | DARRELL | DARRELL | | 10/01/199 |
| Barr | Donita | DONITA | | |
| Barr | Douglas | | | 06/01/201 |
| Barr | Jerri | | | |
| Barr | Jessica | | | |
| Barr | Kandy | | Snickers | |
| BARR | KELLY | | | 07/17/201 |

4. Select the **Transcript** tab

5. Highlight the **training** you wish to change the status for.



Enterprise Edition Administration Center

HOME CLASSES COURSES GROUPS **PEOPLE** REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS

Options

- ▶ New Person
- ▶ New Person From...

Search by:

All

Last Name

barr

Find Advanced Previous Search

Recent People

- ▶ Barr, Kandy
- ▶ Doe, Jane M.
- ▶ Bears, Robynn
- ▶ Doe, John M.

Person

Barr Kandy TRAIN0000001 Job Code:

Workstation: 000 Work Location:

ID Data **Transcript** Plan Groups Curriculums Notes Mail Manager Approver Profiles

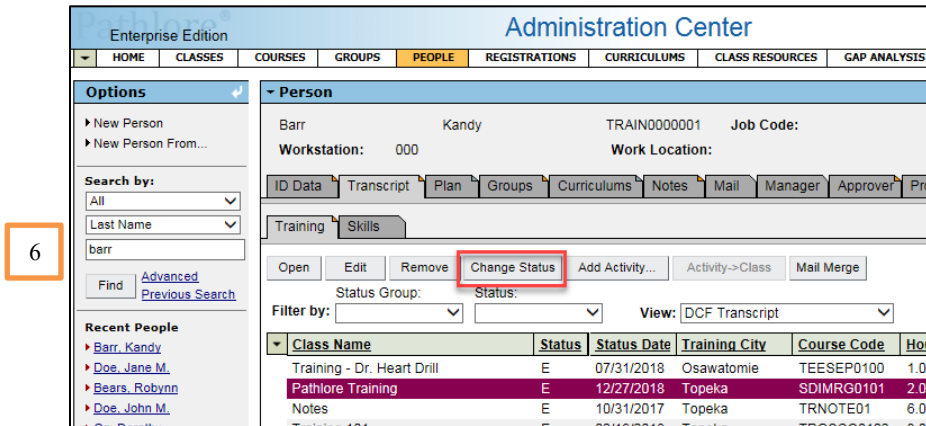
Training Skills

Open Edit Remove Change Status Add Activity... Activity->Class Mail Merge

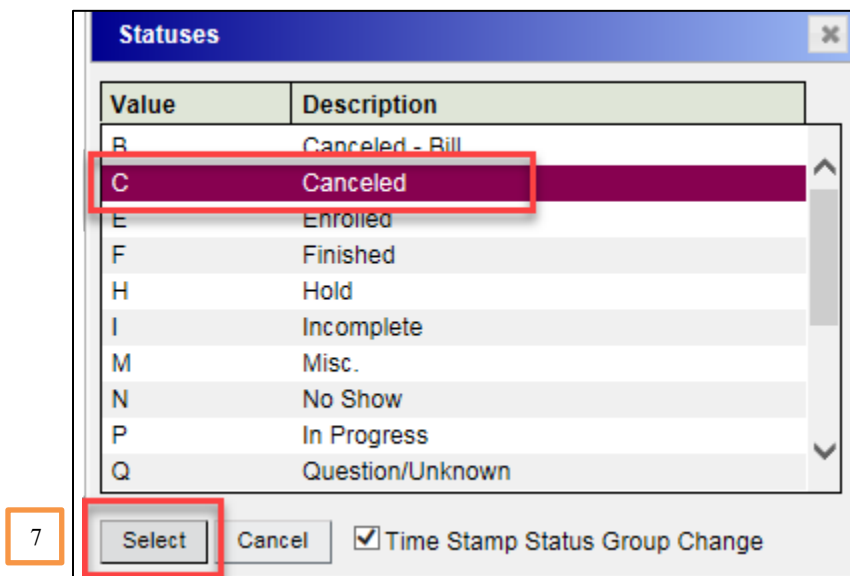
Status Group: Status: View: DCF Transcript

| Class Name | Status | Status Date | Training City | Course Code | Hours | Start Da |
|----------------------------|--------|-------------|---------------|-------------|-------|----------|
| Training - Dr. Heart Drill | E | 07/04/2018 | Ooawotomic | TGSEEP0100 | 1.00 | 11/11/20 |
| Pathlore Training | E | 12/27/2018 | Topeka | SPIMRG0101 | 2.00 | 04/04/20 |
| Notes | E | 10/04/2017 | Topeka | TRNOTE01 | 6.00 | 10/01/20 |

6. Select the **Change Status** button above the trainings. A Statuses window will pop up.



7. Highlight **C-Canceled** (or other status you wish to update to) and choose **Select** at the bottom of the pop-up window.



The status is automatically updated once you choose Select. You will see the screen reflect the change.

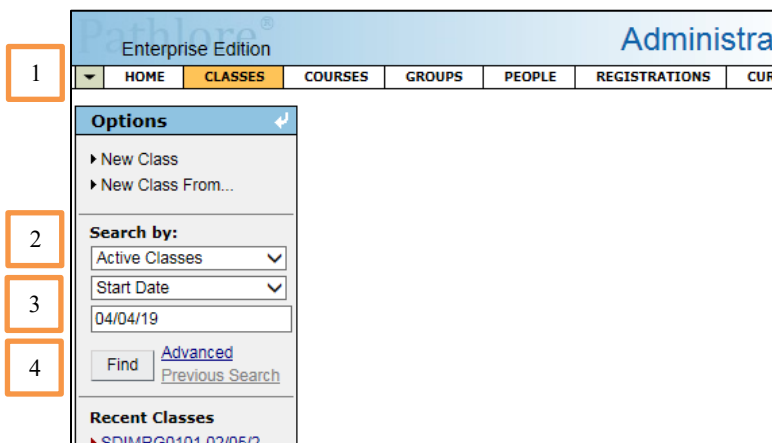
NOTE: You may make other types of status change updates in a similar fashion as listed above. For example: If someone is enrolled and they wish to move to the Wait List, you may change their status from E to W.

How to Record Completion of Instructor Led Training

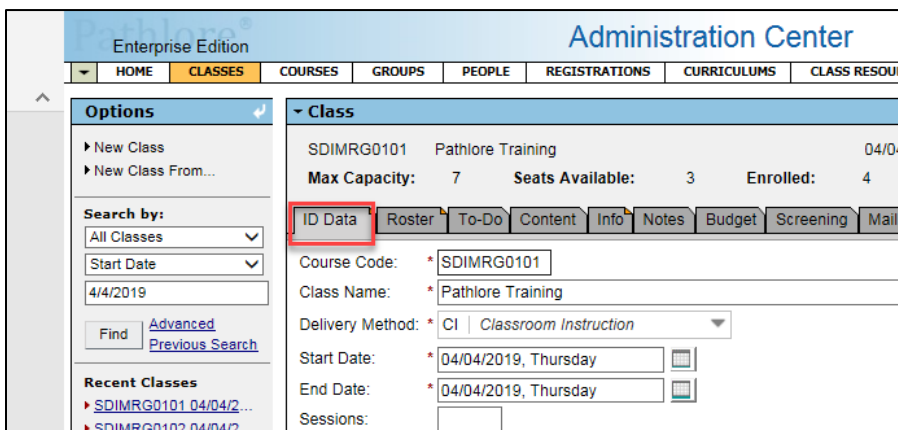
All classes should have a “Finished” status, post training. When the training is complete, you will want to “finish” out the class. When a class is finalized, none of the participants registered in the training should have a status of “E” Enrolled. It is the responsibility of the class owner to finish out each of their classes, preferable within one week of completing the training.

Use documentation (such as the Sign-in Sheet) to confirm the status, post-training, of each participant who was registered in the class.

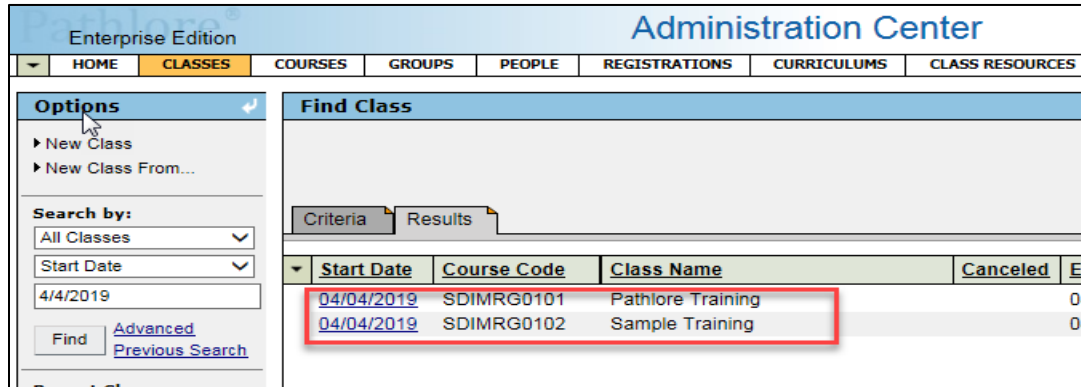
1. Select the **Classes** tab from the Navigation Bar.
2. In the **Options** panel, locate **Search by:** and choose **Active Classes** from the drop down. In the second box below **Search by:** choose **Start Date** from the drop down.
3. Key in the start date of the class you wish to finish MM/DD/YY.
4. Select **Find**.



If there is only **one** class, the screen will automatically populate the ID Data section for that class.



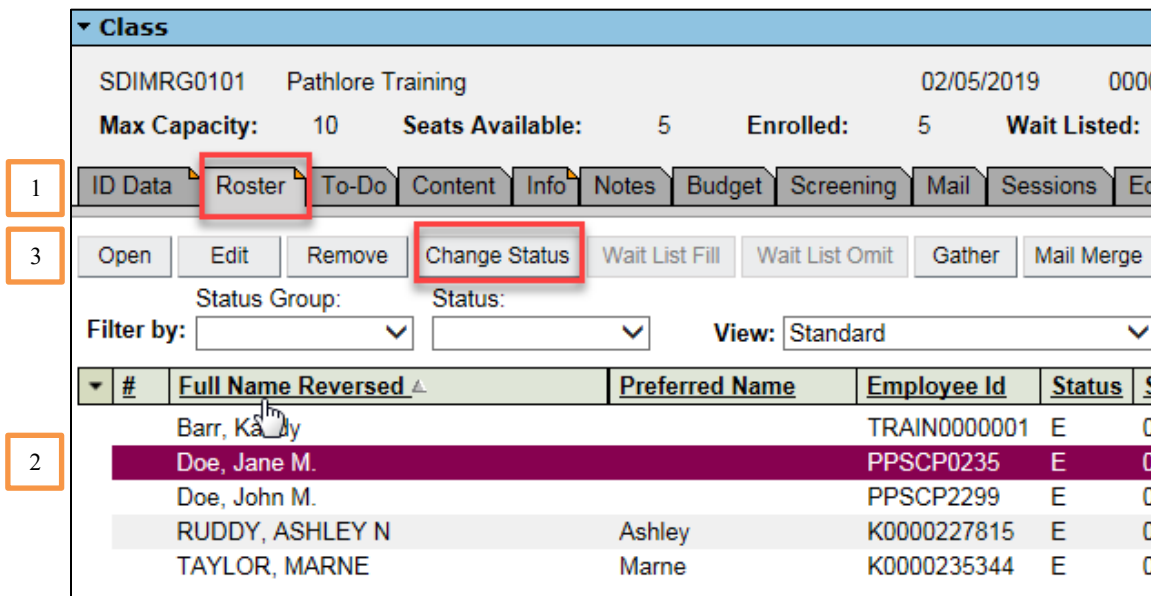
If there is more than one class, a list will open. Select the correct class, by clicking on the date, and the class information will populate on the screen.



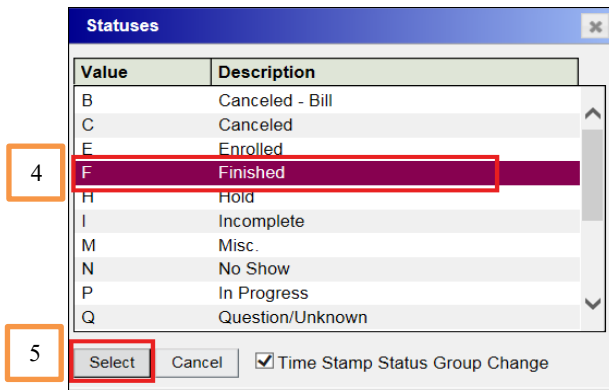
You may change the status of one person at a time or change multiple people's status (if the same) at one time.

To change one person's status:

1. Select the **Roster** tab.
2. Highlight the person's name.
3. Select the **Change Status** button on the secondary tool bar.

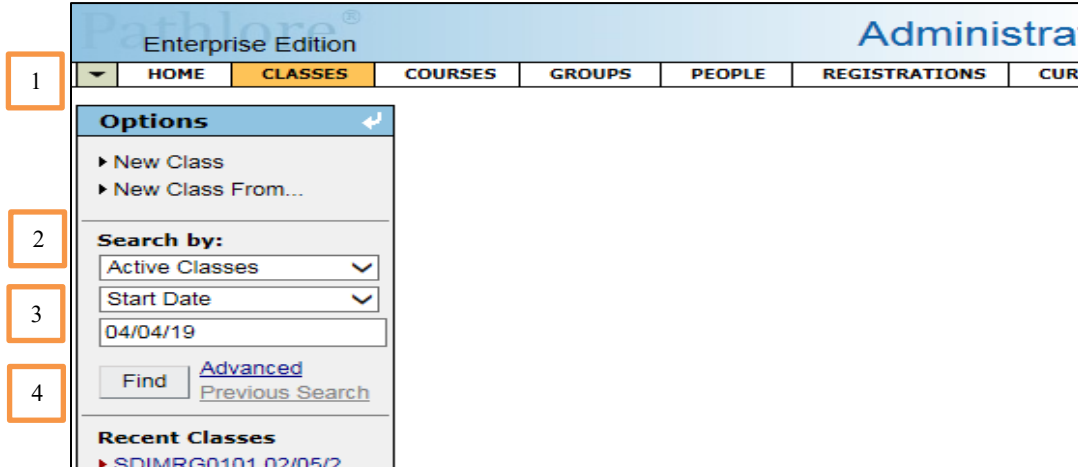


4. The Statuses window will open. Highlight the appropriate status.
5. Choose **Select** at the bottom of the screen. A change in status is automatic and you will not have to save your change.



To Change the Status of Multiple People (with the same status update) at One Time:

1. Select the **Classes** tab from the Navigation Bar.
2. In the **Options** panel, locate **Search by:** and choose **Active Classes** from the drop down. In the second box below **Search by:** choose **Start Date** from the drop down.
3. Key in the start date of the class you wish to finish MM/DD/YY.
4. Select **Find**.



5. Select the class you wish to finish by clicking on the date.

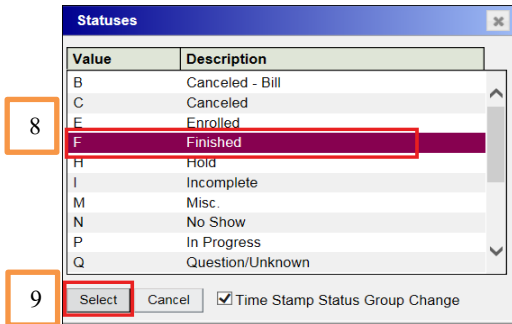
| Find Class | | | | | |
|------------|----------------------------|-------------|-------------------|----------|------------|
| Criteria | | | | | |
| Results | | | | | |
| | Start Date | Course Code | Class Name | Canceled | End Date |
| 5 | 02/05/2019 | SDIMRG0101 | Pathlore Training | | 02/05/2019 |
| | 02/22/2019 | SDIMRG0101 | Pathlore Training | | 02/22/2019 |
| | 02/22/2019 | SDIMRG0101 | Pathlore Training | | 02/22/2019 |
| | 04/04/2019 | SDIMRG0101 | Pathlore Training | | 04/04/2019 |
| | 01/01/2030 | SDIMRG0101 | Pathlore Training | | 01/01/2030 |

6. You may then select multiple people using one of two methods:
 - a. Multiple consecutive people
 - i. Highlight the first person on the roster.
 - ii. Hold down the Shift Key and select the last person on the list you wish to make a status update to.
 - b. Multiple people not consecutive
 - i. Highlight a person on the roster
 - ii. Hold down the CTRL key and then select each person on the list you wish to make a status update on.
7. Select the **Change Status** button on the secondary tool bar once you have made your selections.

| Class | | | | | |
|----------------------|--------------------|-------------------------|---------------|------------------|----------------|
| SDIMRG0101 | Pathlore Training | | | | 02/05/2019 |
| Max Capacity: | 10 | Seats Available: | 7 | Enrolled: | 3 |
| Wait List: | | | | | |
| ID Data | Roster | To-Do | Content | Info | Notes |
| Budget | Screening | Mail | Sessions | | |
| Open | Edit | 7 | Change Status | Wait List Fill | Wait List Omit |
| Gather | Mail M | | | | |
| Status Group: | | Status: | | | |
| Filter by: | | | | View: | Standard |
| # | Full Name Reversed | Preferred Name | Employee Id | Stat | |
| 6 | Barr, Kandy Sue | Sue | TRAIN000000 | E | |
| | Doe, Jane M. | | PPSCP0235 | E | |
| | Doe, John M. | | PPSCP2299 | E | |

- The Statuses window will open. Highlight the appropriate status.
- Choose **Select** at the bottom of the screen.

Pathlore automatically saves these changes.

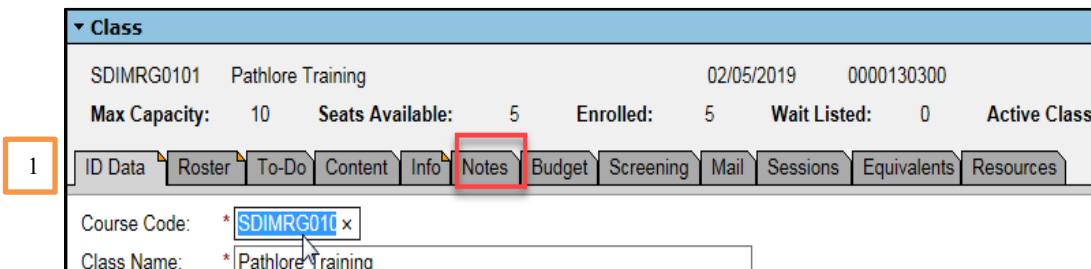


Adding Notes

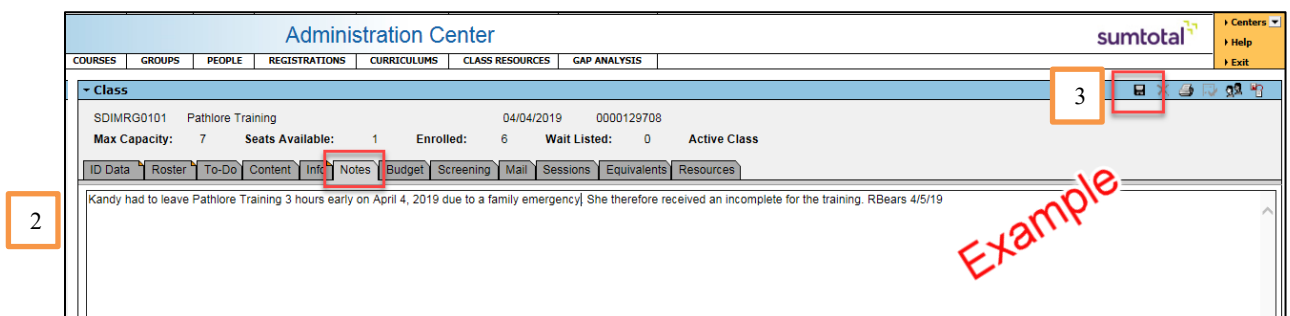
Notes can be entered in the Notes tab in Classes, Courses or People. We will demonstrate putting a note in a class. You may put a note in Course or People using the same steps as will be using in Classes.

You must first access the class for which you are wanting to enter the note. Then follow these steps:

- Select the **Notes** tab.



- Enter the note. At the end of the note enter your name and the date the information was entered.
- Select the **Save** icon.



Note from the Instructor for the Example above: “Kandy had to leave Pathlore Training three hours early on April 4, 2019 due to a family emergency. She therefore received an incomplete for the training.” RBears 4/5/19

Here are some reasons Notes should be entered:

Person did not complete a class in its entirety.

Occasionally, a person may not be able to attend a training in its entirety. The person will receive an “I” status for incomplete. The instructor should have included an explanation as to why the person received an Incomplete. Add a note in the class Note section **and** in the person’s record Notes section explaining the reason for the Incomplete. At the end of each note, enter your name and the date the information was entered.

Person finishes in a class later than when they began a class.

If a person previously attended a class but was not able to finish it in its entirety their status in the first class was originally listed as “I”. When they finish in the later class the status for the second class will be “F” and the status of the 1st class will be changed from a “I” to a “S”.

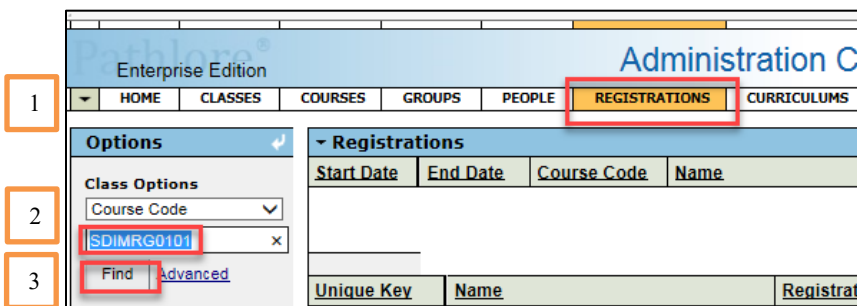
You will need to make a notation of which class they finished in.

Example: Kandy began the training in the 1/20/19 training. She was not able to attend the class in its entirety. Kandy attended the components of the class she missed at the 2/20/19 class. She has now completed all components of the training. KEvers 2/21/19.

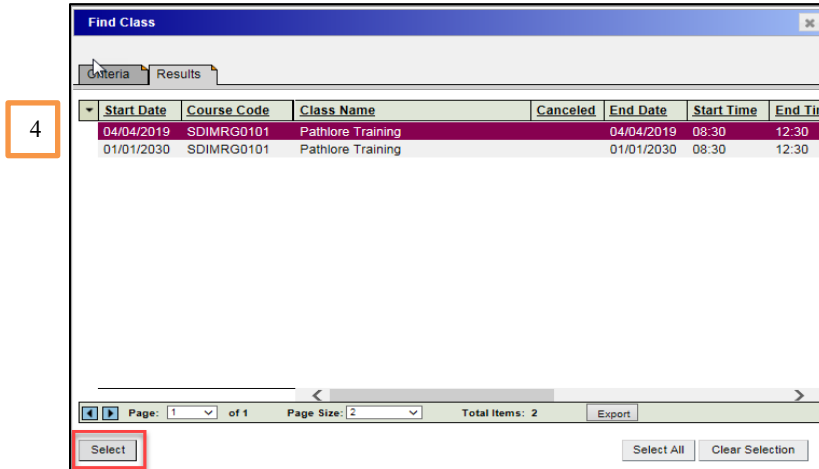
Registering a Walk-In

Occasionally, people who did not pre-register for a training, may attend a class. If a person did not pre-enroll in a class, you may register them for the class and giving them finished status at the same time.

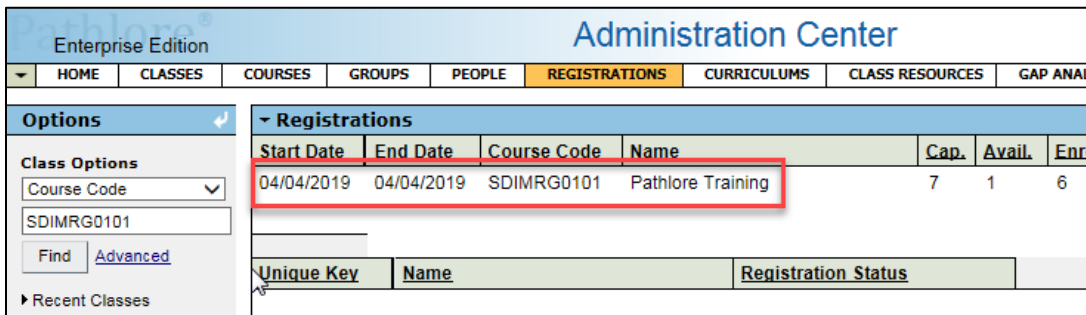
1. Select **Registrations** from the menu bar.
2. In the Options panel, under class options, Select **Course Code** in the first drop down. Then enter the Course Code in the second drop down.
3. Select **Find**.



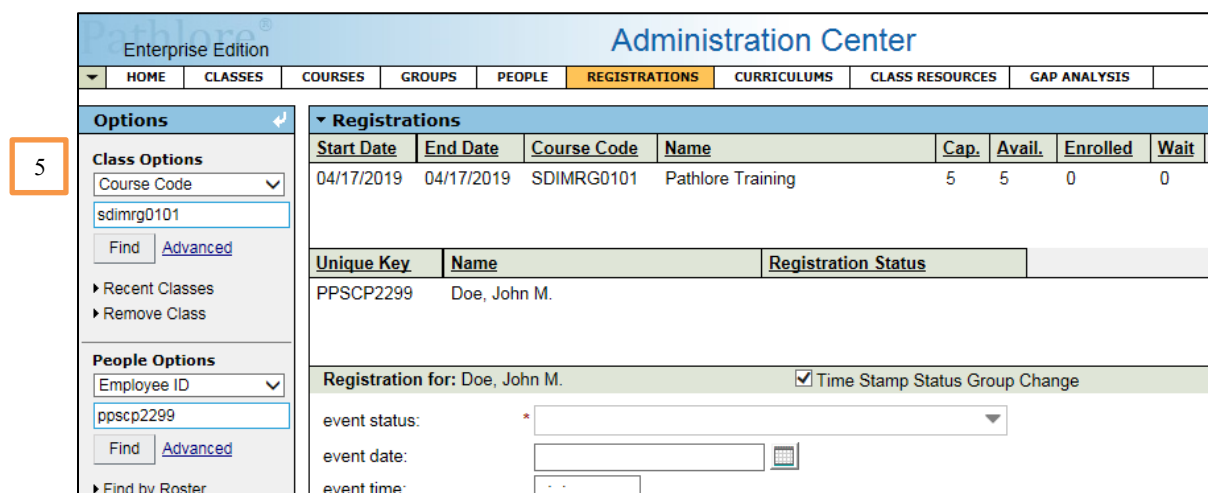
- A Find Class pop window will populate the screen. Scroll down to select correct class, highlight it and then choose **Select** at the bottom left hand corner.



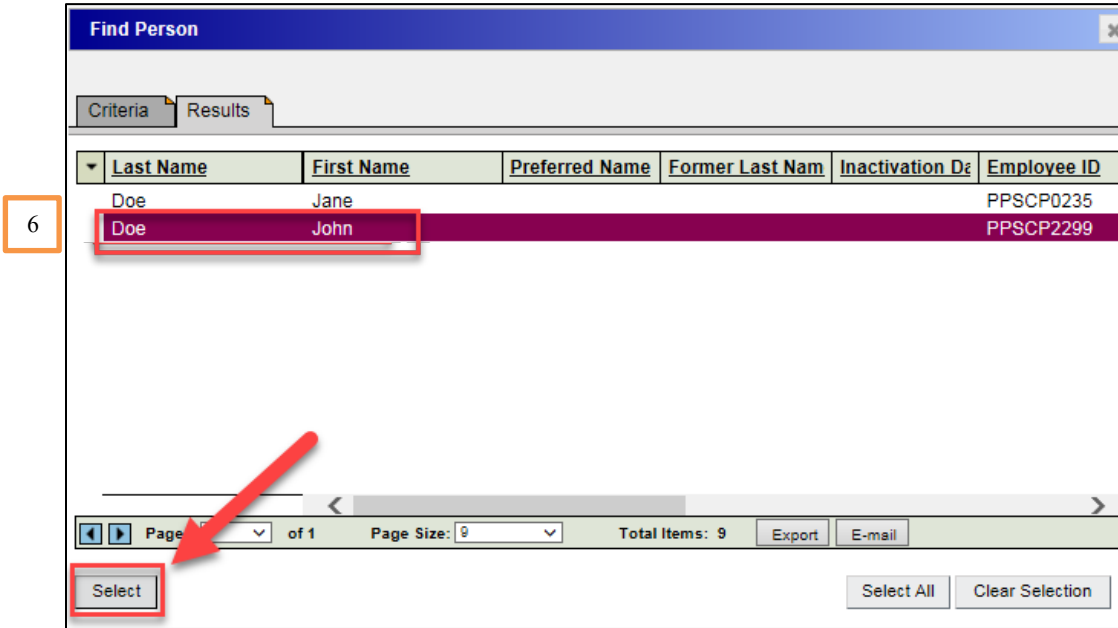
The class will populate the registration window.



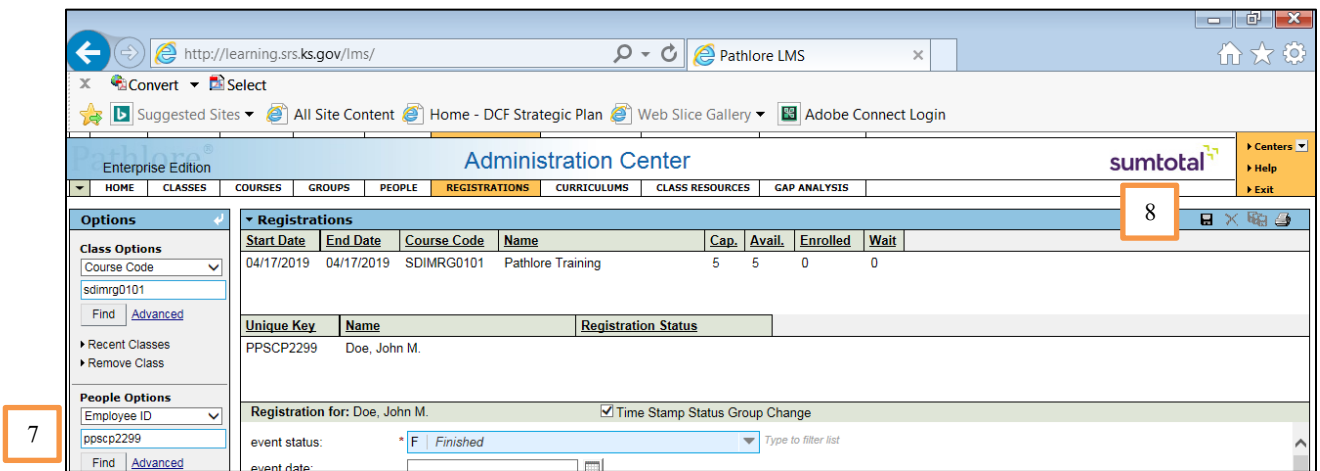
- In Options Panel, from the People Options, use the drop down and select **Employee ID** or **Last Name** and enter that person's information. Select **Find**.



- Highlight the person from the Find Person list and choose Select at the bottom left corner of the window.



- Enter the event status as **Finished** (or other appropriate status).
- Select **SAVE**.



Pathlore Administrator Manual

Section 5
Reports

Reports

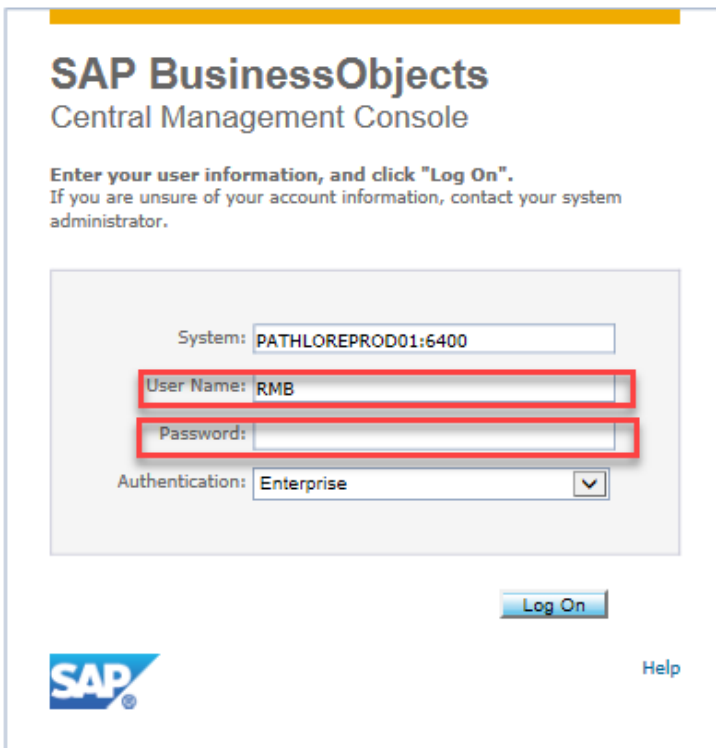
SAP Crystal Reports is a report writing program used by DCF to extract information within the Pathlore Learning Management System. Crystal Reports may be used to create reports, transcripts, sign-in sheets and class certificates.

Logon Process

To access Crystal Reports, select the following link:

<http://165.201.112.40:8080/BOE/CMC>

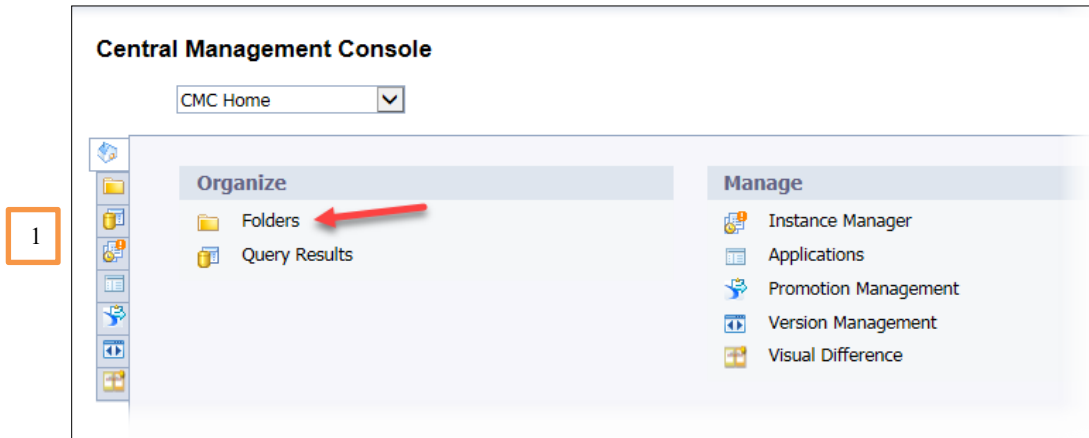
1. From the Central Management Console enter:
 - a. **User Name** – Your Crystal Report user name.
 - b. **Password** – Your Crystal Report password.
2. Select **'Log on'** button.



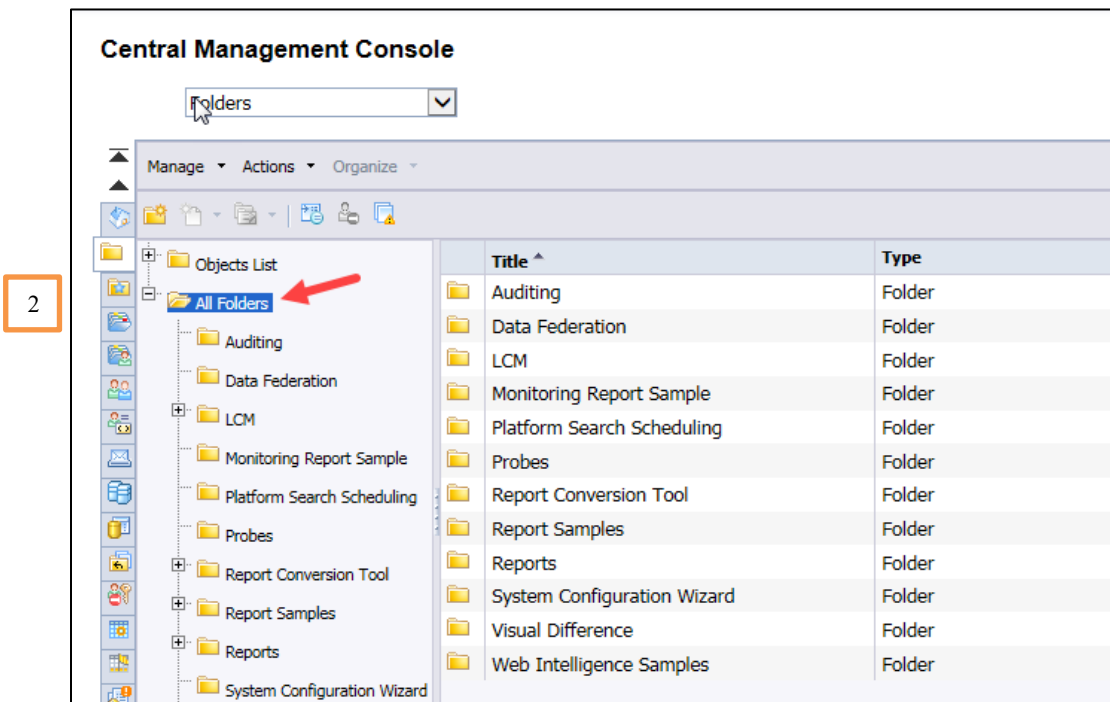
The screenshot shows the SAP BusinessObjects Central Management Console login page. The page title is "SAP BusinessObjects Central Management Console". Below the title, there is a prompt: "Enter your user information, and click 'Log On'. If you are unsure of your account information, contact your system administrator." The login form contains the following fields: "System" with the value "PATHLOREPROD01:6400", "User Name" with the value "RMB", "Password" (empty), and "Authentication" with a dropdown menu set to "Enterprise". A "Log On" button is located below the form. The SAP logo is in the bottom left corner, and a "Help" link is in the bottom right corner. Two orange boxes with numbers "1" and "2" are overlaid on the image. Box "1" is positioned to the left of the User Name and Password fields. Box "2" is positioned to the left of the Log On button.

Accessing Reports

1. In the Central Management Console, select **Folders** located under the **Organize** column.

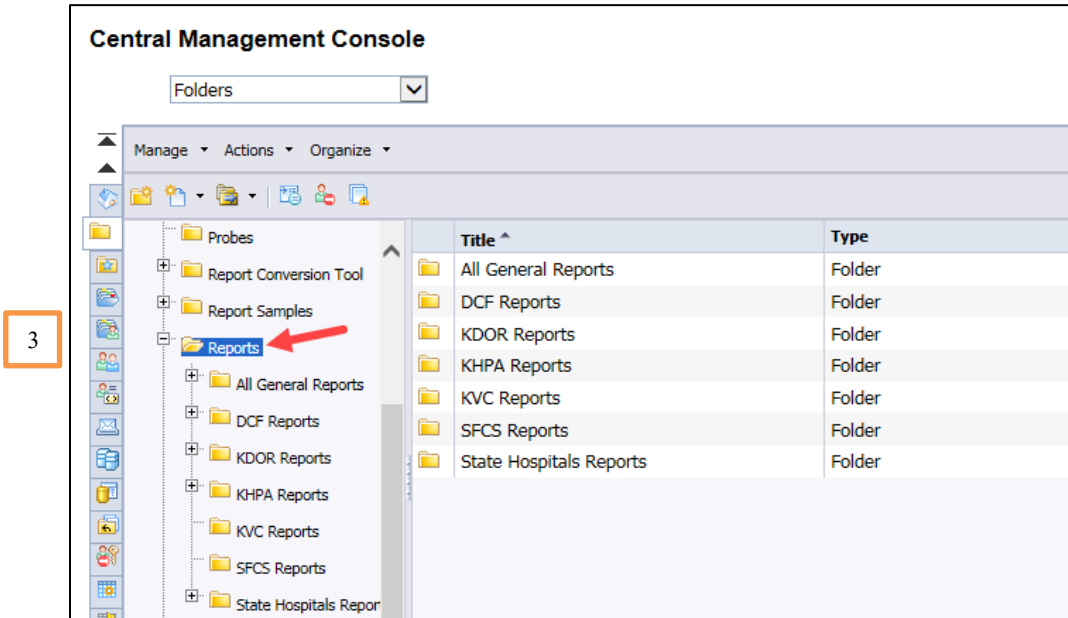


2. Select **All Folders** from the folder tree that opens. Use (+) to expand the folder. Folders within the chosen folder will be listed.

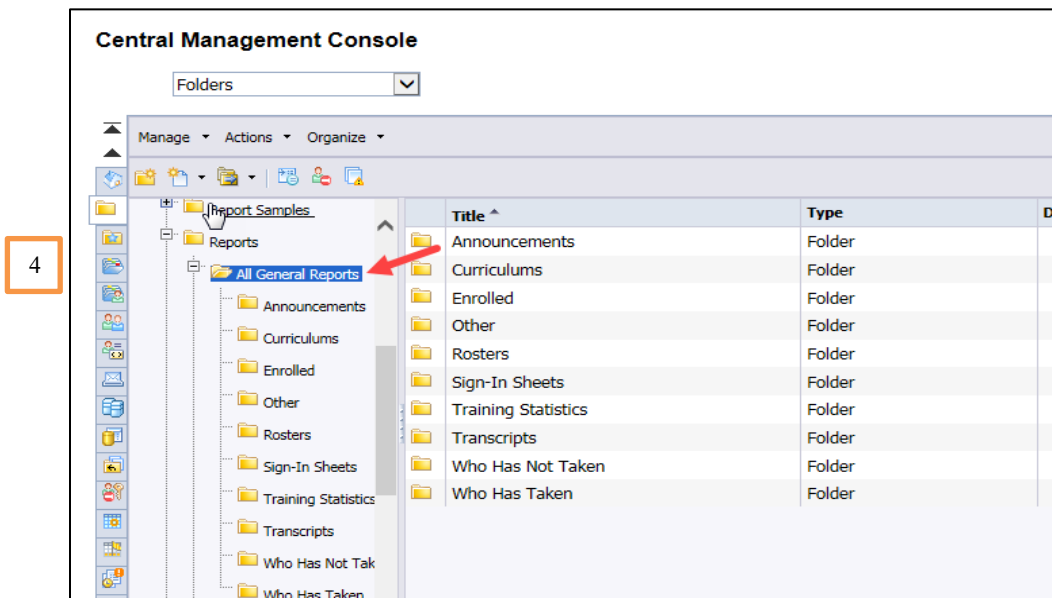


3. Select the Reports folder. You can expand this folder at the (+) or you can access All General Report folders under the Title column by double clicking on it.

NOTE: The folders displayed under the **Reports** folder will vary based on the ownership rights of a given Pathlore Administrator.



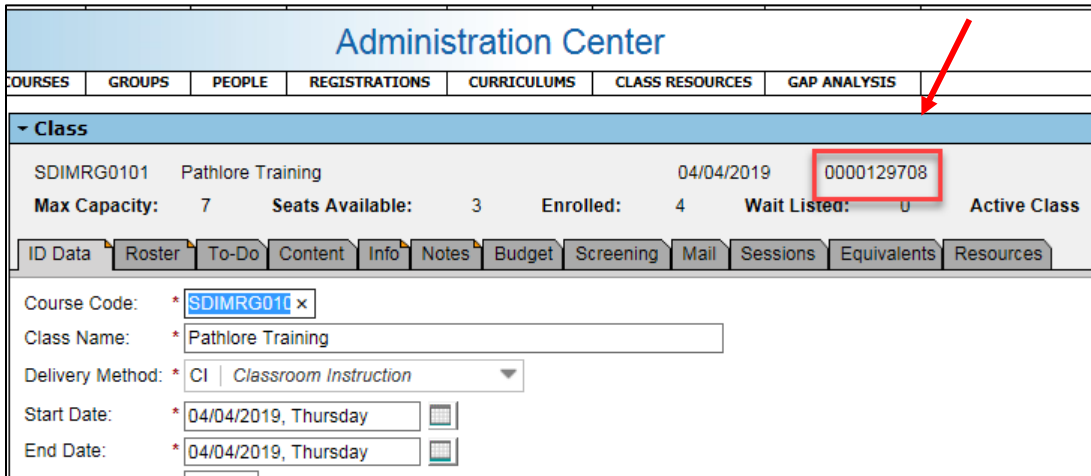
4. Select the folder applicable to the report you wish to run. In this example, we will use **All General Reports** folder. Use the (+) to expand the folder or double click on the folder in the Title column.



The General Reports folder includes reports that are available to all Pathlore Administrators. The subfolders are:

- **Announcements** – Reports used to provide the time, date and other information about an upcoming class. Announcements can be used to promote and distribute information about a class.
- **Enrolled** – Reports used to list people enrolled in a class, exempt in a class, or lists inactive people enrolled in a class.
- **Other** – Collection of miscellaneous reports such as active and inactive courses, an employee listing by agency, group membership, inactive course list, instructor's hours, or people assigned to take a curriculum.
- **Rosters** – Reports used to list people enrolled in a class. There are several types of rosters available within this folder. Rosters list the same people as sign-in sheets but provides more information about the people such as location or email address.
- **Sign-In Sheets** – Reports used to print out a list of those enrolled in a class. They can be used to record attendance in a class and it also provides a space where the participants sign their initials to indicate attendance in the class. Sign-in sheets are available in various formats; one to seven-day classes. There are also A.M. and P.M. sign-in sheets which provide a space for the participants to initial that they attended both the a.m. and p.m. components of the class.
- **Training Statistics** – Reports used to provide a variety of training statistics such as number of classes delivered, number of training hours, courses available by unit, etc.
- **Transcripts** – Reports used to list the classes taken by a person (Basic Transcript). There are also transcripts which just list CEUs.
- **Who Has Not Taken** – Reports used to list people who have not taken a specified course.
- **Who Has Taken** – Reports used to list people who have taken a specified course.

NOTE: Most classes can be uniquely identified by course code and start date, but if a class is offered multiple times on the same day (Ex: One in the morning and one in the afternoon), the report by Locator Number is needed. The Locator Number of a class is located to the far right when you open the ID Data tab of a class. It is a 10-digit number.



Administration Center

COURSES GROUPS PEOPLE REGISTRATIONS CURRICULUMS CLASS RESOURCES GAP ANALYSIS

Class

SDIMRG0101 Pathlore Training 04/04/2019 **0000129708**

Max Capacity: 7 Seats Available: 3 Enrolled: 4 Wait Listed: 0 Active Class

ID Data Roster To-Do Content Info Notes Budget Screening Mail Sessions Equivalents Resources

Course Code: * SDIMRG0101 x

Class Name: * Pathlore Training

Delivery Method: * CI | Classroom Instruction

Start Date: * 04/04/2019, Thursday

End Date: * 04/04/2019, Thursday

- For our example we will use the folder **“Who Has Not Taken”**
Select the **Who Has Not Taken** subfolder.

| | Title ^ | Type | Description |
|---|--------------------------|--------|-------------|
| | Announcements | Folder | |
| | Enrolled | Folder | |
| | Other | Folder | |
| | Rosters | Folder | |
| | Sign-In Sheets | Folder | |
| | Training Statistics | Folder | |
| | Transcripts | Folder | |
| 5 | Who Has Not Taken | Folder | |
| | Who Has Taken | Folder | |

The description of each report in this subfolder is shown in the Description column.

| Title | Type | Description |
|---|----------------------|---|
| Who Has Not Taken - Sorted by Location | Crystal Reports 2011 | List of people in from the selected region(s) or division(s) wh |
| Supervisors Who Have Not Taken a Course | Crystal Reports 2011 | List of Supervisors that have not taken a specific course. Sort |
| Who Has Not Taken by Agency | Crystal Reports 2011 | List of people from the selected agency who have NOT taken |
| Who Has Not Taken by Region with Equivalent | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take |
| Who Has Not Taken by Workstation and Date | Crystal Reports 2011 | List of people from the selected unit(s) who have NOT taken |
| Who Has Not Taken or Enrolled by Region | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take |
| Who Has Not Taken by Unit | Crystal Reports 2011 | List of people from the selected unit(s) who have NOT taken |
| Who Has Not Taken by Region and Location | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take |
| Who Has Not Taken by Region | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take |

If the entire description is not displayed (as shown above), moving the mouse pointer over the description will cause the entire description to display.

| Title | Type | Description | Date Modified |
|---|----------------------|---|-----------------------|
| Who Has Not Taken - Sorted by Location | Crystal Reports 2011 | List of people in from the selected region(s) or division(s) wh | Sep 17, 2019 3:42 PM |
| Supervisors Who Have Not Taken a Course | Crystal Reports 2011 | List of Supervisors that have not taken a specific course. Sort | May 24, 2019 11:23 AM |
| Who Has Not Taken by Agency | Crystal Reports 2011 | List of people from the selected agency who have NOT taken | Jan 14, 2019 10:49 AM |
| Who Has Not Taken by Region with Equivalent | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take | Nov 9, 2018 10:11 AM |
| Who Has Not Taken by Workstation and Date | Crystal Reports 2011 | List of people from the selected unit(s) who have NOT taken | Mar 29, 2017 3:47 PM |
| Who Has Not Taken or Enrolled by Region | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take | Jan 27, 2016 10:11 AM |
| Who Has Not Taken by Unit | Crystal Reports 2011 | List of people from the selected unit(s) who have NOT taken | Jan 21, 2016 12:24 PM |
| Who Has Not Taken by Region and Location | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take | Jan 19, 2016 9:56 AM |
| Who Has Not Taken by Region | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take | Jan 19, 2016 9:08 AM |

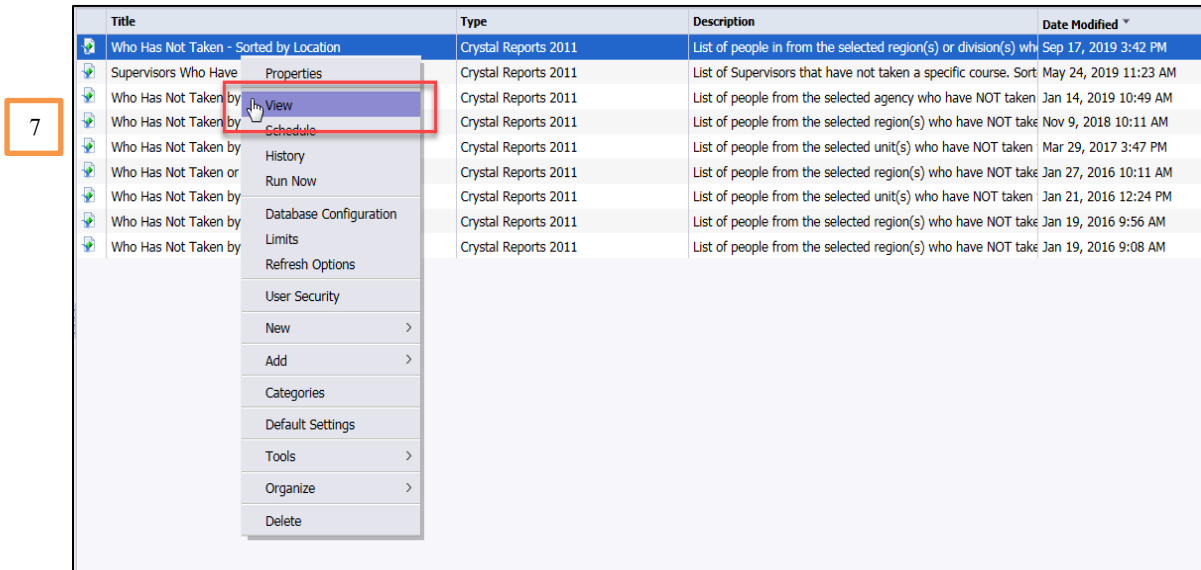
The **Who Has Not Taken by Workstation and Date** report will be used to illustrate how to access a report.

6. Highlight **Who Has Not Taken -Sorted by Location** report.

6

| Title | Type | Description | Date Modified |
|---|----------------------|---|-----------------------|
| Who Has Not Taken - Sorted by Location | Crystal Reports 2011 | List of people in from the selected region(s) or division(s) wh | Sep 17, 2019 3:42 PM |
| Supervisors Who Have Not Taken a Course | Crystal Reports 2011 | List of Supervisors that have not taken a specific course. Sort | May 24, 2019 11:23 AM |
| Who Has Not Taken by Agency | Crystal Reports 2011 | List of people from the selected agency who have NOT taken | Jan 14, 2019 10:49 AM |
| Who Has Not Taken by Region with Equivalent | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take | Nov 9, 2018 10:11 AM |
| Who Has Not Taken by Workstation and Date | Crystal Reports 2011 | List of people from the selected unit(s) who have NOT taken | Mar 29, 2017 3:47 PM |
| Who Has Not Taken or Enrolled by Region | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take | Jan 27, 2016 10:11 AM |
| Who Has Not Taken by Unit | Crystal Reports 2011 | List of people from the selected unit(s) who have NOT taken | Jan 21, 2016 12:24 PM |
| Who Has Not Taken by Region and Location | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take | Jan 19, 2016 9:56 AM |
| Who Has Not Taken by Region | Crystal Reports 2011 | List of people from the selected region(s) who have NOT take | Jan 19, 2016 9:08 AM |

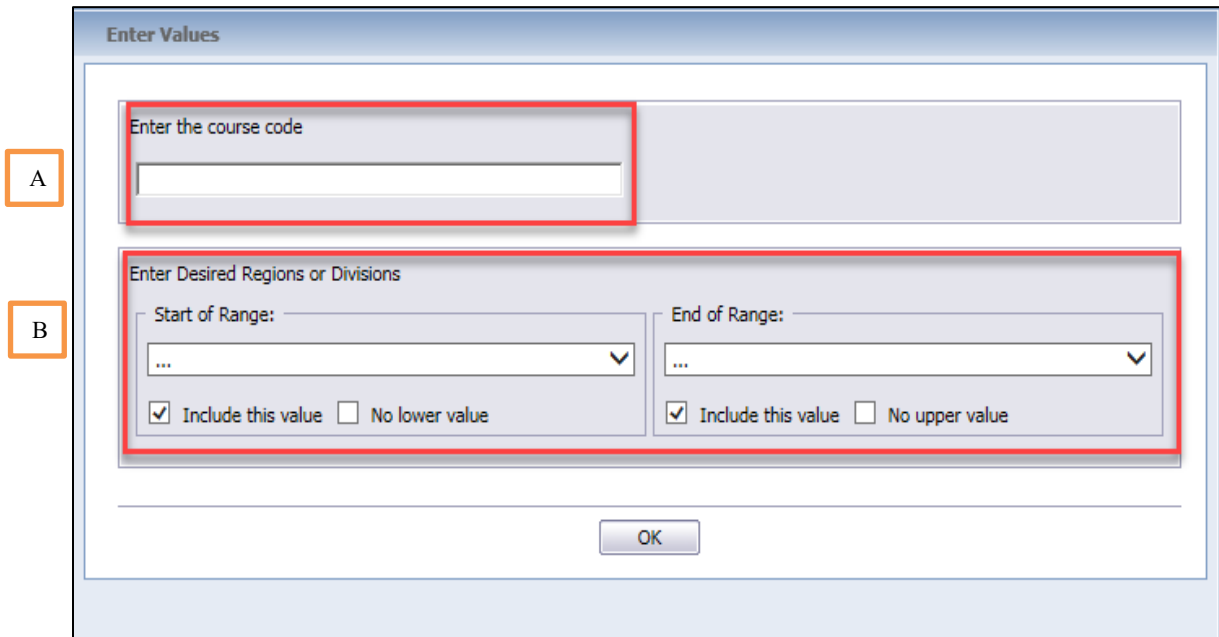
7. Right click and select **View** on “Who Has Not Taken -Sorted by Location”.



The **Enter Values** pop-up box will appear.

This example report *requires* the entry of the following criteria:

- A. Course Code
- B. Enter Desired Regions or Divisions



8. Enter the desired 10-digit course/class code into the **Enter the Course Code (A)** section.

8

Enter the course code

9. In the **Enter Desired Regions or Division**, enter the starting and ending range for the Regions/Divisions you wish to have in the report. These codes can be accessed by using the drop-down menu.

9

Enter Desired Regions or Divisions

| | |
|--|---|
| <p>Start of Range:</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="text" value="62973 - West Region"/> </div> <p><input checked="" type="checkbox"/> Include this value <input type="checkbox"/> No lower value</p> | <p>End of Range:</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="text" value="62976 - Wichita Region"/> </div> <p><input checked="" type="checkbox"/> Include this value <input type="checkbox"/> No upper value</p> |
|--|---|

NOTE: The **Include this Value** boxes determine how the value in the **Enter a Value** is used. If checked, the value in the **Start of Range** field and/or the **End of Range** will be included in the report. If unchecked, the value will be excluded. The effect of excluding the value is that the next higher or lower value than the excluded value(s) will be used in the report.

| | |
|--|--|
| <input checked="" type="checkbox"/> Include this value <input type="checkbox"/> No lower value | <input checked="" type="checkbox"/> Include this value <input type="checkbox"/> No upper value |
|--|--|

NOTE: When the lowest or the highest value in a range is **not** known, the **Enter a Value** field can be left blank and **No lower value** box (a) or **No upper value** box (b) under it can be checked. These boxes are most often used with date ranges. For example, if the report needs to include all previous offerings of a class, the **No lower value** box under a **Start of Range** field would be checked.

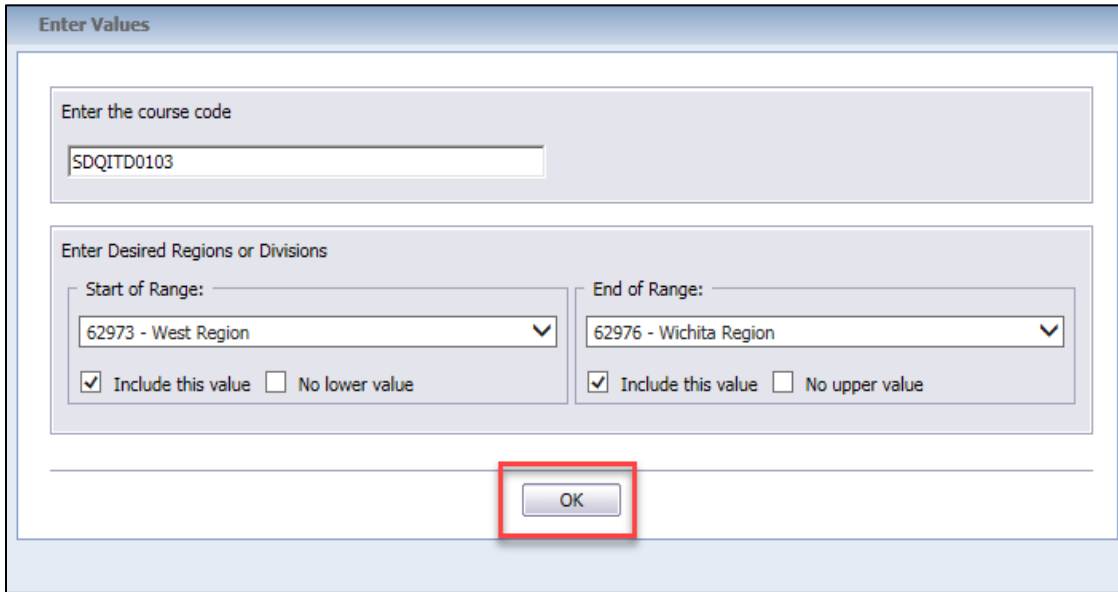
Either the **No lower value** or **No upper value** box can be checked but not both. **One of the two range values must be an actual value. Both may not be checked.**

Enter the range for the Start Date

| | |
|---|--|
| <p>Start of Range:</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="text"/> </div> <p>Enter a Value:</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="text"/> </div> <p><input checked="" type="checkbox"/> Include this value <input checked="" type="checkbox"/> No lower value</p> | <p>End of Range:</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="text" value="2/15/2019"/> </div> <p>Enter a Value:</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="text"/> </div> <p><input checked="" type="checkbox"/> Include this value <input type="checkbox"/> No upper value</p> |
|---|--|

- After the selection criteria has been entered, select the **OK** button at the bottom of the pop-up box.

10



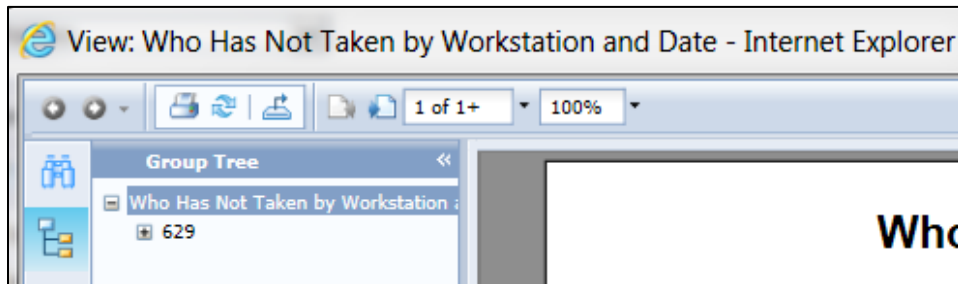
Run a Report

The report will then be displayed on the screen.

| Who Has Not Taken Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 SDQITD0103 As of 09/17/2019 | |
|---|--------------------------|
| 629 Kansas Dept. for Children and Families | |
| Atchison DCF Service Center | Agency Start Date |
| | 07/15/2019 |
| | 03/23/1983 |
| | 07/31/2017 |
| | 08/13/2018 |
| | 09/28/2015 |
| | 10/12/2015 |
| Number at the Location: | 6 |
| Chanute DCF Service Center | Agency Start Date |
| | 08/26/2019 |
| | 04/01/2013 |
| | 07/13/2008 |
| | 03/11/2019 |
| | 05/12/1998 |
| | 11/07/1977 |
| | 08/27/2018 |
| | 08/18/2013 |
| | 08/14/2000 |
| | 03/26/2018 |
| | 04/25/2005 |

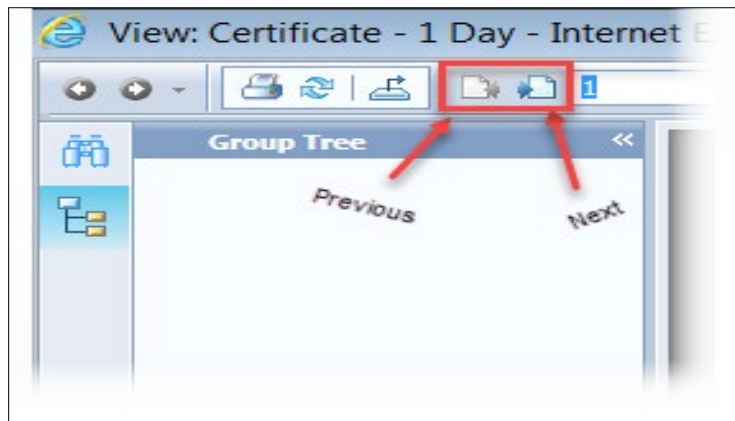
Functions within a Report

On the top left-hand corner of the screen you will see various functions which you can perform. These are each explained below.



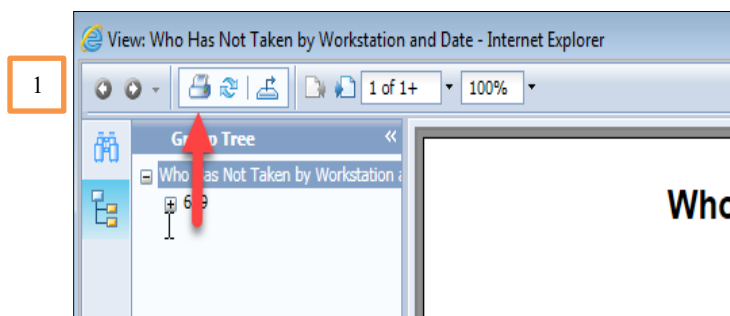
View the Report

To scroll through a multi-page report, use the **Go to Previous Page** and the **Go to Next Page** icons or simply select the right edge of the report and scroll.

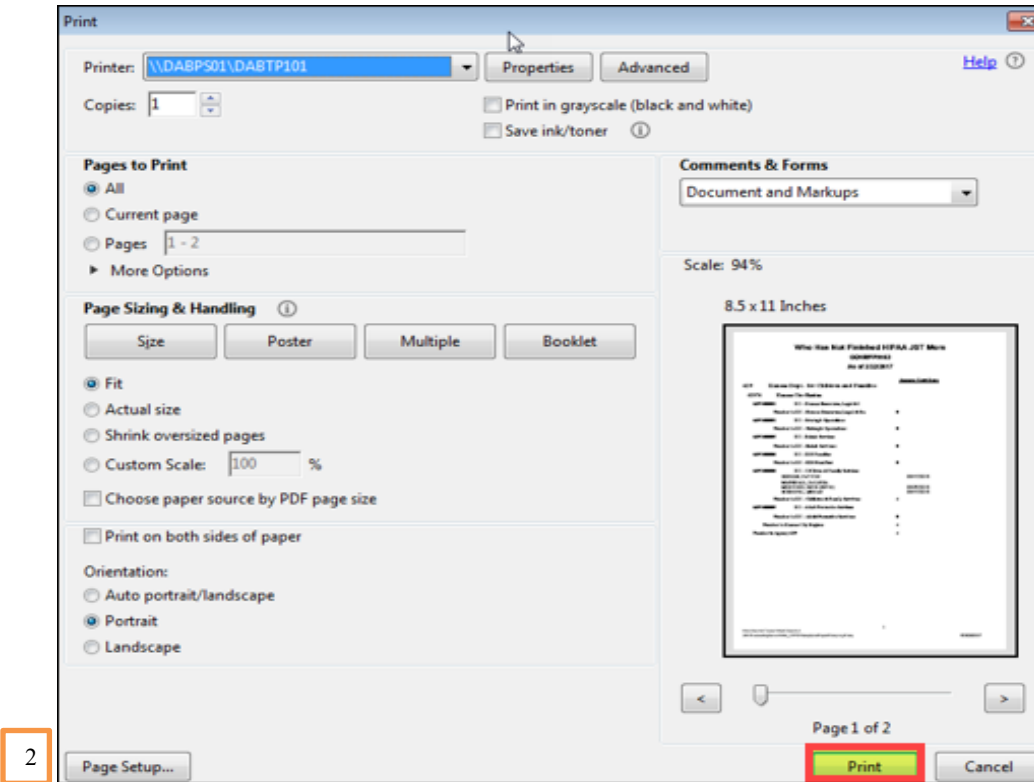


Print the Report

1. To print the report, select the Print icon.



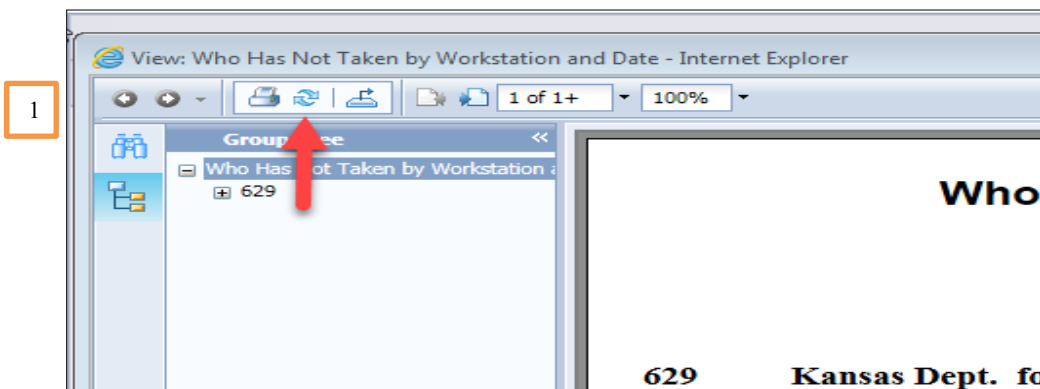
2. A standard print box appears. Select the desired print options (printer, size, orientation, number of pages, etc.) and select the **Print** button.



Refresh the Report

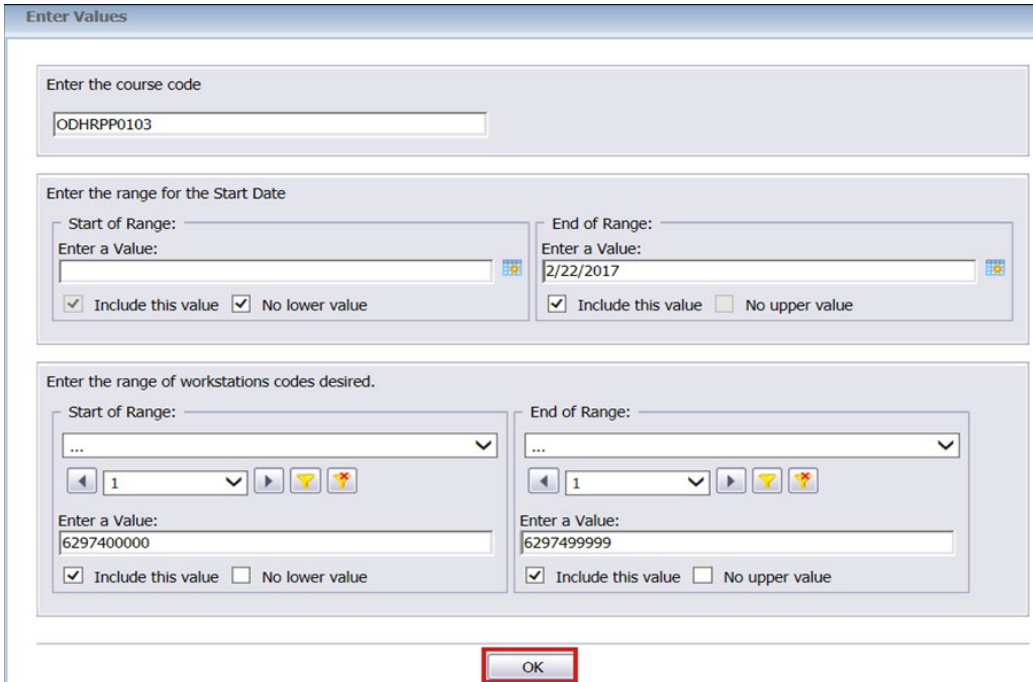
Once finished with the current report, there may be a need for another report of the same type with different values. For example: A different course code or date range.

1. To refresh the report, select the **Refresh** icon.



The **Enter Values** box reappears.

2. At the prompt enter the desired value(s) and continue through the same process as listed above



Enter Values

Enter the course code
ODHRPP0103

Enter the range for the Start Date

Start of Range: Enter a Value: []
 Include this value No lower value

End of Range: Enter a Value: 2/22/2017
 Include this value No upper value

Enter the range of workstations codes desired.

Start of Range: []
1

End of Range: []
1

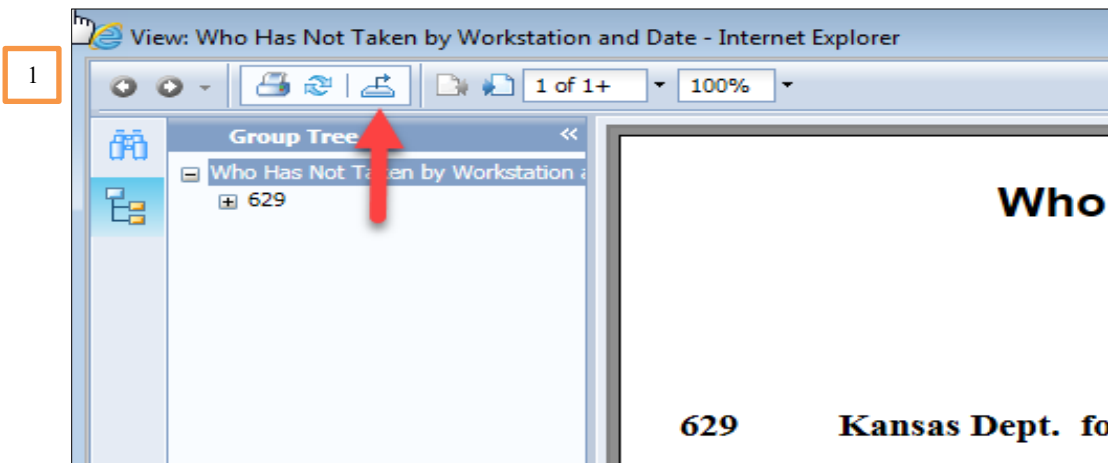
Enter a Value: 6297400000
 Include this value No lower value

Enter a Value: 6297499999
 Include this value No upper value

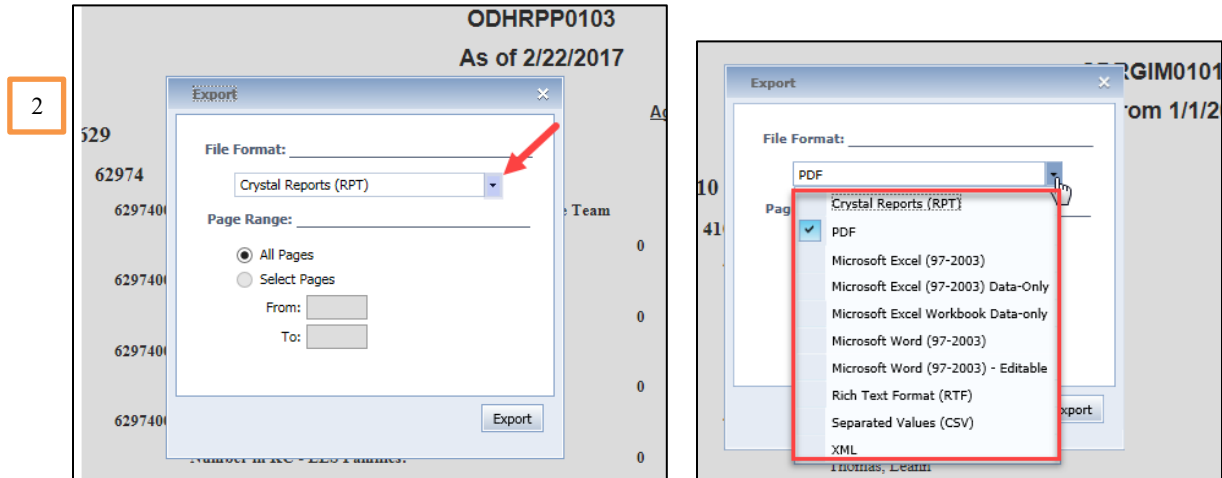
OK

Export the Report

1. To export a copy of the report, select the **Export** icon.



2. Select the File Format dropdown menu to see the list of export formats

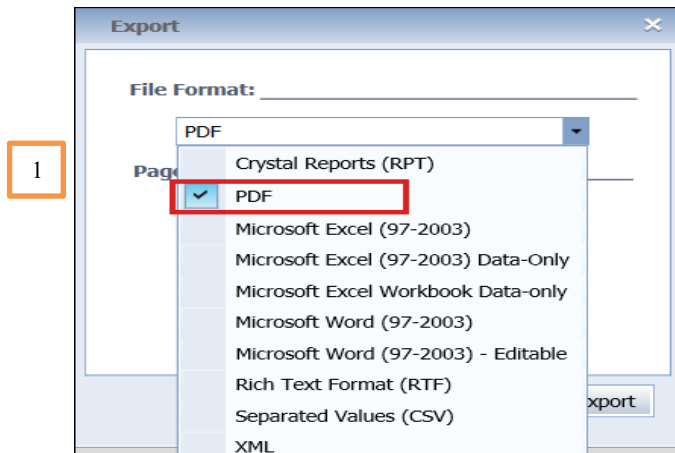


The three most commonly used formats are:

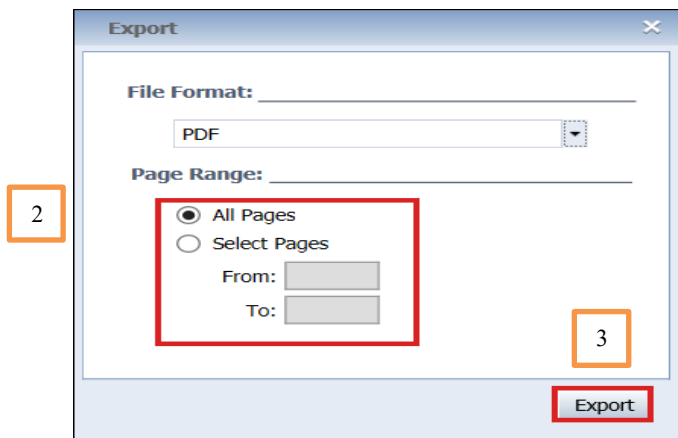
- **PDF – Adobe PDF format**
 - Best format for sharing the report. It keeps all formatting in its current form. Once in this format, no changes can be made to the report.
- **Microsoft Excel – Spreadsheet**
 - Microsoft Excel (97-2007) includes data plus all titles, headings and labels. This format allows changes to be made to the spreadsheet.
 - Microsoft Excel (97-2007) Data-Only and Microsoft Excel Workbook (97-2007) Data-Only exports only the data to the spreadsheet (no titles, headings, or labels). Rarely would there be a need to export to one of these formats.
- **Microsoft Word – Word document**
 - Microsoft Word (97-2007) exports the report to a Word document in a form that cannot be edited.
 - Microsoft Word (97-2007)-Exports the report to a Word document in a form that can be edited.

The other formats would not be needed except in very rare cases.

1. Select the desired format.



2. Select **All Pages** or **Select Pages** and enter the page range desired.
3. Select the **Export** button.



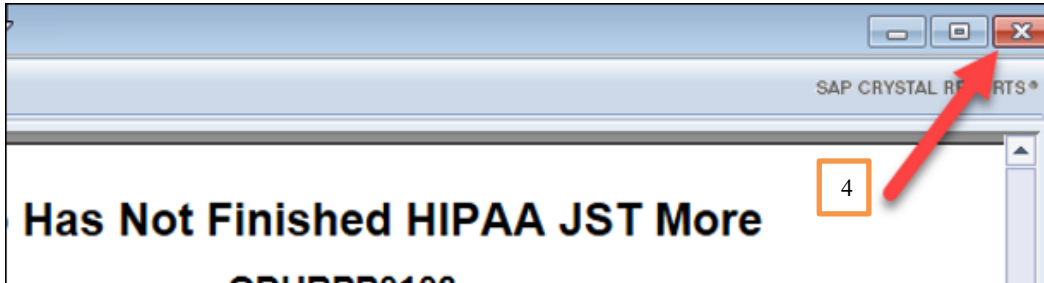
NOTE: If a security message, such as the example shown below appears, the options are:

- **Open** – The export file is displayed on the screen
- **Save** – The export file is saved
- **Cancel** – The export process is canceled

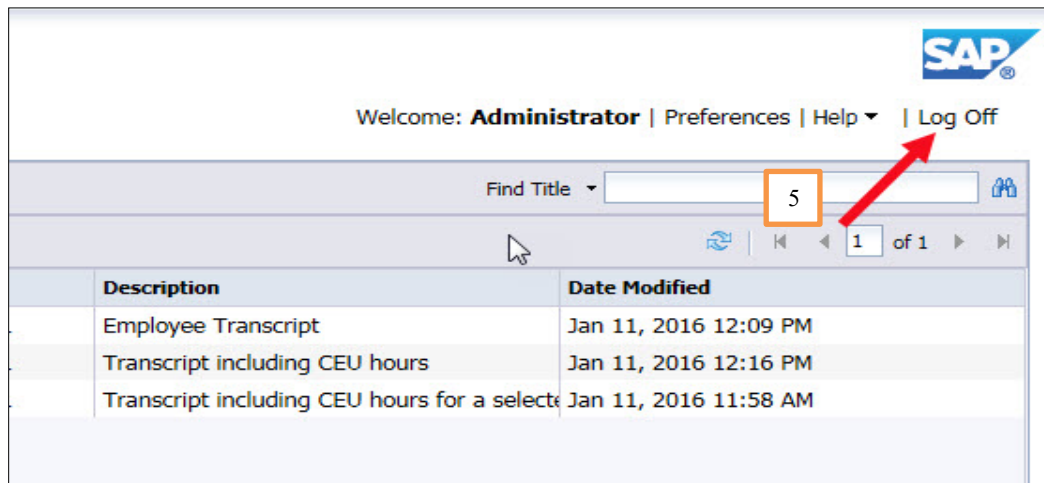
Select the appropriate option.



4. **Close the Report Window** by selecting the **X** in the upper right of the window to return to the Reports folder.



5. **Exit the Central Management Console (Crystal Reports)** when finished running reports. Select **Log Off** in the upper right corner of the Reports screen.



*DCF Strategic Development has a five-concurrent user license for Crystal Reports. This means only five users can be logged into Crystal Reports at any one time. If five people were logged in and a sixth person tried to log in, the sixth person would get a message that the system is unavailable and to try again later. **Therefore, users should log off once they have finished running reports.***

Examples of some of the more commonly used reports

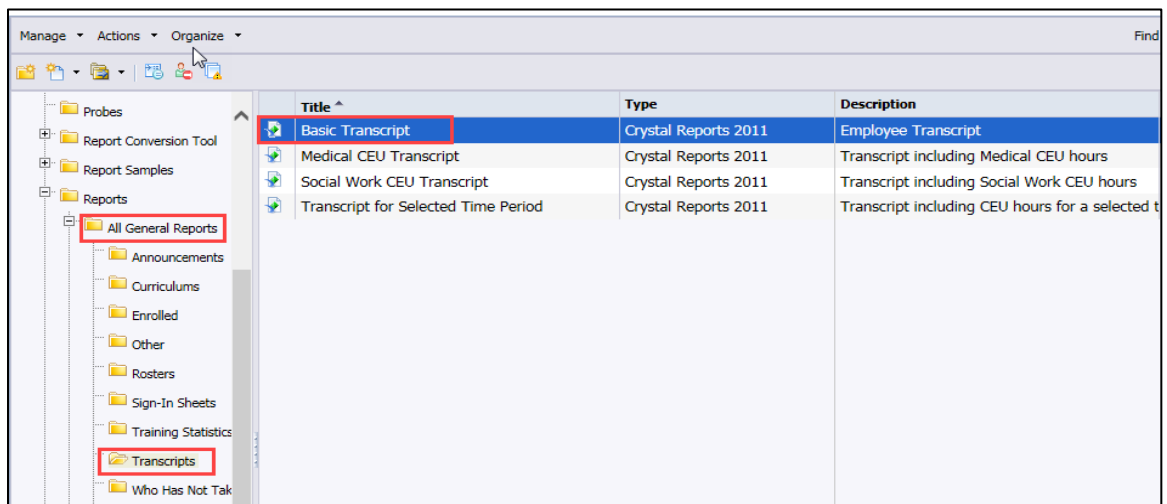
There are many reports available through Crystal Reports. The following three reports serve as examples of some of the more commonly used types of reports. The screen shots show the location of the reports and the selection criteria needed.

Transcript

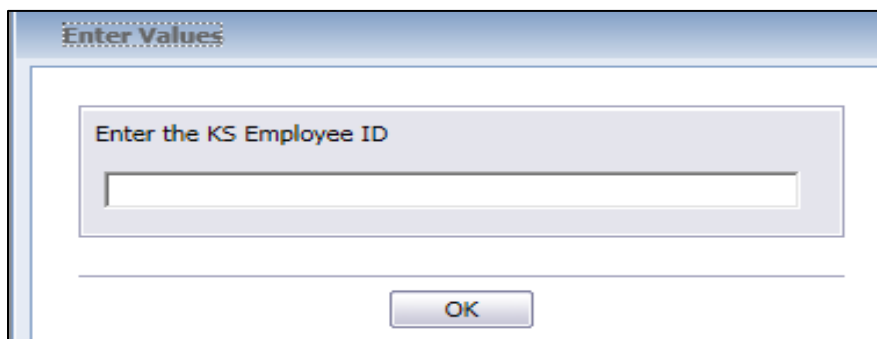
Basic transcripts can be found in the Transcripts subfolder under the All General Reports folder.

NOTE: Transcripts customized for a specific organization unit will be found under that organization's folder.

To access, highlight the one you want to select and then select view. (As previously described in this section.)



The selection criteria for this transcript is the Employee ID. Enter the Employee ID and select OK.



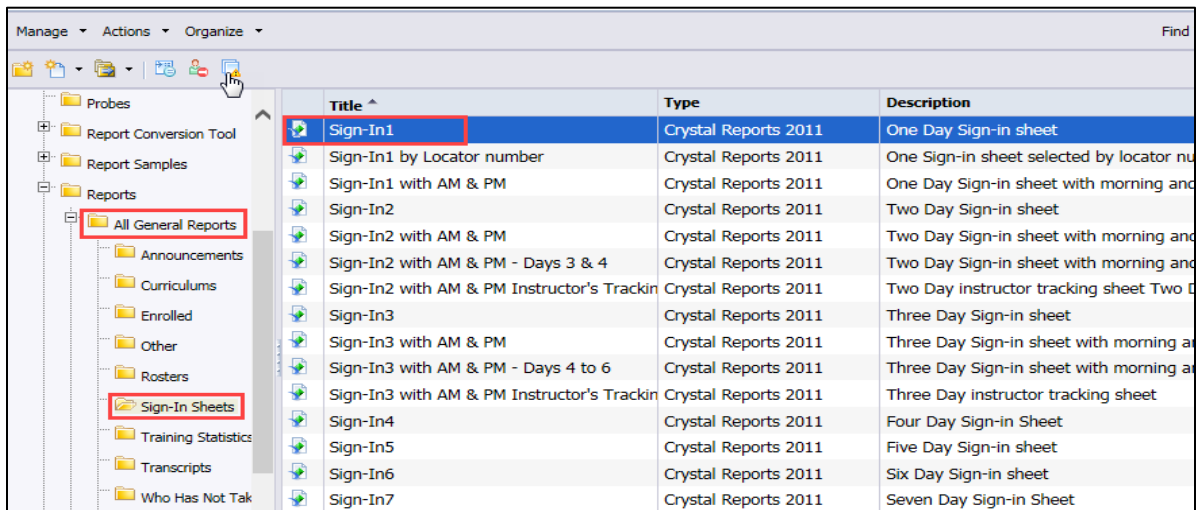
The screenshot shows a dialog box titled "Enter Values". Inside the dialog, there is a text input field with the label "Enter the KS Employee ID". Below the input field is an "OK" button.

This transcript shows that some of employee’s identifying information and lists each class the employee has completed.

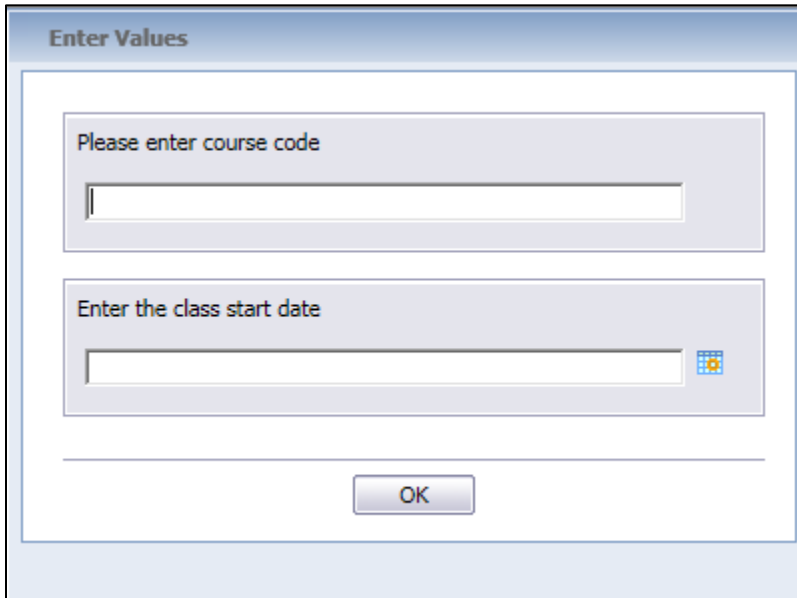
| Employee Transcript | | | | |
|-----------------------------------|--|-------------------|-----------------|--------------------|
| Classes Finished as of 03/23/2018 | | | | |
| Name: | MC [REDACTED] | | | |
| KS Employee ID: | 61 [REDACTED] | | | |
| Agency: | KJ [REDACTED] | | | |
| Area or Division: | KJ [REDACTED] | | | |
| Workstation: | KJ [REDACTED] | | | |
| <u>Course Code</u> | <u>Class Name</u> | <u>Start Date</u> | <u>End Date</u> | <u>Contact Hrs</u> |
| XXITTEST01 | IT Quiz Demo | 08/01/2014 | 08/01/2014 | 0.10 |
| PPPSCW0114 | The Period of Purple Crying | 05/01/2013 | 05/01/2013 | 1.25 |
| KDORASSESS | KDOR Assessment Test 1 | 11/01/2012 | 11/01/2012 | 0.50 |
| ODHRPP0101 | HIPAA Awareness | 09/01/2012 | 09/01/2012 | 0.50 |
| SDMB1005 | Test Version - What You Don't Know Can Hurt You (Business Ethics - Course 1) | 06/01/2010 | 06/01/2010 | 1.00 |
| SMART001 | Sunflower Proj | 07/01/2009 | 07/02/2009 | 8.00 |
| SDGSSD0101 | Orientation to Centra | 09/05/2008 | 09/05/2008 | 1.00 |
| ITIMINT101 | Internet Training | 02/02/2006 | 02/02/2006 | 3.00 |

Sign-in Sheet

Sign-in sheets can be found in the Sign-in Sheets subfolder under the All General Reports folder. To access, right click the folder you desire and then select view.



The selection criteria for this sign-in sheet is the Course Code and the Start Date of the class. Enter both values and select OK.

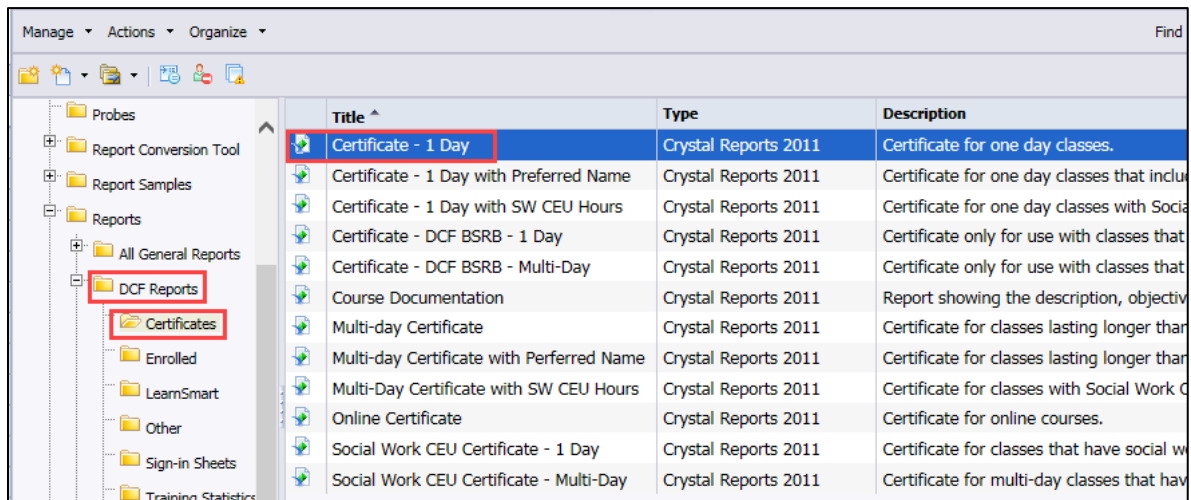


This sign-in sheet shows the class identification information, lists people with an enrolled status in the class, provides a space for enrollees to initial they attended and a space for the instructor to indicate each person's final status in the class. (example: Finished, Incomplete, No Show, etc.)

| <u>Class Sign In Sheet</u> | | | |
|---|---|--|--|
| CLASS CODE: | SDQITD0103 | | |
| CLASS NAME: | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | |
| INSTRUCTOR(S): | Shanna Jager | | |
| START DATE: | 4/4/2018 | | |
| LOCATION: | Hutchinson Service Center | | |
| START TIME: | 9:30 AM | | |
| | | | Legend F = Finished I = Incomplete N = No Show C = Cancelled W = Walk-in |
| NOTE: If the participant is a walk-in and finishes/incompletes the class, indicate by putting a W+F or W+I in the Course Completed Column. | | | |
| <u>NAME</u> | LICENSE # | (PLEASE INITIAL FOR ATTENDANCE) | COURSE COMPLETED |
| BA [REDACTED] | _____ | _____ | _____ |
| Ba [REDACTED] | _____ | _____ | _____ |
| BE [REDACTED] | _____ | _____ | _____ |
| BII [REDACTED] | _____ | _____ | _____ |
| BO [REDACTED] | _____ | _____ | _____ |
| BO [REDACTED] | _____ | _____ | _____ |

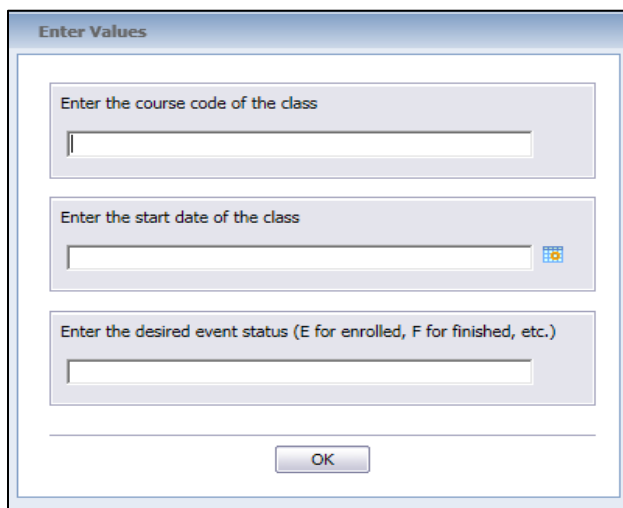
Certificate

Since certificates include organizational branding, they are not under the All General Reports folder. They can be found in the Certificates subfolder under an organization’s folder. This example uses a certificate from the Certificates subfolder under the DCF Reports folder. Highlight the certificate you wish to use, right click and select view.




The selection criteria for this certificate is the Course Code, the Start Date of the class and the Event Status.

NOTE: Certificates are usually run before the occurrence of a class. Therefore, “E” for “Enrolled” is used most of the time, but other statuses can be entered if needed. For example, “F” for “Finished” if certificates are run after the class has been finished.



After you enter the information, select “OK”.

This certificate shows the class name, the class start date, the name of the attendee, the number of Contact Hours, the names of up to four instructors and provides a space for each instructor to sign and date the certificate.



Kansas
Department for Children
and Families

STATE OF KANSAS
DEPARTMENT FOR CHILDREN AND FAMILIES

*In Recognition of the Completion of Requirements for
the Program*

Maximizing Your Strengths to Strengthen Kansas Families-Phase 1
April 04, 2018

This Certificate is Awarded to

DO [REDACTED] I

Contact Hours: 3.00

Instructor(s): Shanna Jager

Instructor Date

Finding the criteria needed for the report

Each report has one or more selection criteria. In some reports, the criteria are built into the report. Reports also allow some criteria to be entered by the user. The user entered criteria may be a specific value or may be a range of values depending on the report. The type of criteria may be characters, numbers, or dates.

NOTE: Crystal Reports can accept a variety of date formats. (Ex: MM/DD/YYYY)

If the user does not know specific criteria, this information can be obtained in Pathlore.

NOTE: Highlights in the screen shots below show some of the fields that are most commonly used as criteria in reports.

Person Data

Person

Be [redacted] R [redacted] [redacted] Job Code:

Workstation: 999 Work Location:

ID Data | Transcript | Plan | Groups | Curriculums | Notes | Mail | Manager | Approver | Profiles

KS Employee ID: * K0000

Last Name: * Be [redacted]

First Name: * R [redacted]

Middle Name: [redacted]

Preferred Name: [redacted]

Former Last Name: [redacted]

Agency: * 999 | (Value not in lookup table) 🔍

Region / Division: * 999 | (Value not in lookup table) 🔍

Workstation: 999 | (Value not in lookup table) 🔍

Work Location: [redacted] 🔍

Class Data

Class

SDQITD0103 Maximizing Your Strengths to Strengthen Kansas Famili... 04/04/2018 0000125990

Max Capacity: 75 Seats Available: 14 Enrolled: 61 Wait Listed: 0 Active Class

ID Data | Roster | To-Do | Content | Info | Notes | Budget | Screening | Mail | Sessions | Locator Number

Course Code: * SDQITD0103

Class Name: * Maximizing Your Strengths to Strengthen Kansas Families-Phase

Delivery Method: * CI Classroom Instruction

Start Date: * 04/04/2018, Wednesday 📅

End Date: * 04/04/2018, Wednesday 📅

Sessions: [redacted]

Start Time: 09:30 | 9:30 am 🔍

End Time: 14:30 | 2:30 pm 🔍

Class Added: [redacted]

Class Canceled: [redacted]

Training Facility: * Hutchinson Service Center 🔍

Training Facility Address: Hutchinson DCF | 600 Andrew Avenue 🔍

Training Facility City: * Hutchinson Hutchinson 🔍

Training Facility County: [redacted]

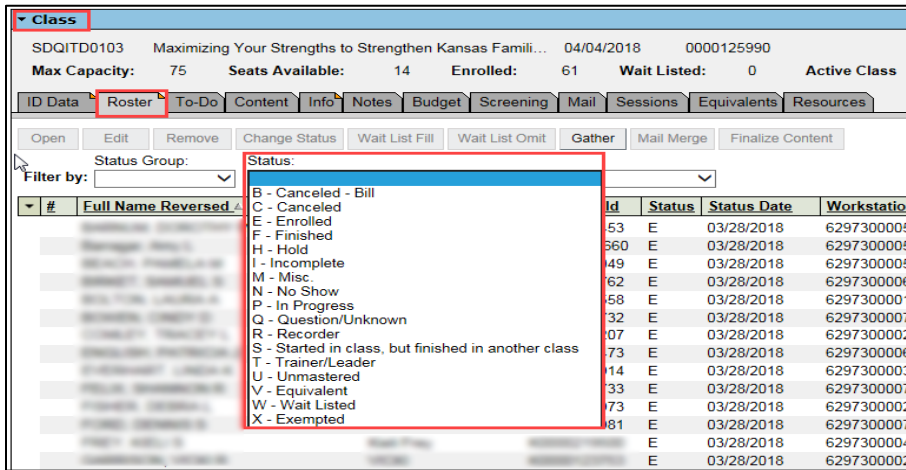
Room: [redacted] 🔍

Maximum Capacity: * 75

Minimum Capacity: 5

Event Status

The most common Event Statuses used as selection criteria in reports are **E** for “Enrolled” and **F** for “Finished”, but other statuses can be used.



The screenshot shows the Pathlore software interface for a class. The class name is "SDQITD0103 Maximizing Your Strengths to Strengthen Kansas Famili...". The status dropdown menu is open, showing the following options:

- B - Canceled - Bill
- C - Canceled
- E - Enrolled
- F - Finished
- H - Hold
- I - Incomplete
- M - Misc
- N - No Show
- P - In Progress
- Q - Question/Unknown
- R - Recorder
- S - Started in class, but finished in another class
- T - Trainer/Leader
- U - Unmastered
- V - Equivalent
- W - Wait Listed
- X - Exempted

The background shows a table with columns: #, Full Name Reversed, Id, Status, Status Date, and Workstation. The status dropdown is currently set to "E".

Any questions concerning reports or requests for new reports should be directed to Strategic Development at DCF.LMSsupport@ks.gov. The telephone number is (785) 296-4327.

Pathlore Administrator Manual

**Section 6
Appendix**

Course and Class Information Forms

The following pages provide blank copies of the following forms:

- Course Information
- Class Information for Instructor-led Trainings

These forms can also be completed online:

- Course Information
<http://learning.srs.ks.gov/lms/courseware/orgdev/studentcenterlinks/docs/CourseInformationForm.docx>
- Class Information for Instructor-led Trainings
<http://learning.srs.ks.gov/lms/courseware/orgdev/studentcenterlinks/docs/ClassInformationSheet.docx>

Course Information

New Date:
Revised Date:

Course Code:

Course Name:

Delivery Method:

Course Start Date: 01/01/2030

Course End Date:

(The ending date is relative to the placeholder start date; example -- 01/02/30 for a two-day class)

Training Facility:

Training City:

Class Size – Maximum/Minimum: /

Contact Hours:

CEU Type: (enter # of hours)

CME I CME II Nursing Psychology ___ General Social Work Ethics Social Work ___
DSM Social Work ___ Safety Social Work ___ Audits Government

Class Owner: Responsible Unit:

Info Section:

Purpose:

Description:

Objectives: *Upon completion of the course, participant will:*

-
-

Prerequisites:

Competencies:

Completion Requirements:

Target Audience:

Instructor(s):

Course Notes:

Optional (Fill in only if applicable to this course)

Age Specific: (Select all that apply) Children Adolescent Adult Senior

Charge per Seat: State: Non-State:

Course Information Instruction Sheet

New **Date:** [enter date]: Mark box if this is a brand-new course and enter today's date.

Revised **Date:** [enter date]: Mark box if this is a revision of an existing course and enter today's date. Determine if this would be a "New Generation of the Course" or if the updates warrant a new Course Code by using the criteria within this manual.

Course Code: A ten-digit code consisting of three two-letter groups and a four-digit numeric group. For example, in the course code SDIMOS0103, the "SD" indicates the responsible unit, the "IM" indicates the general category Information Management and the "OS" would indicate a subcategory, Operating System of the General Category Information Management. The "0" indicates the Local Use Number. The "1" indicates the level of the course as a basic level. The "03" indicates it is the third course established at the basic level. Please refer to the Pathlore Administrators Manual for more information or, please contact us at DCF.LMSsupport@ks.gov or at 785-296-4327.

Course Name: Title of the training. **The first letter of each word needs to be capitalized.**
(Limited to 120 characters including punctuation, numbers and special symbols)

Delivery Method: Enter the method of deliver from this list.

- Blended Learning (Course includes online and instructor lead components)
- Classroom Instruction
- Computer Based Training (CD, DVD, etc.)
- Conference
- Individual Instruction (one-on-one training)
- Online Virtual Classroom (e.g. Adobe Connect, Live Meeting)
- Online Video
- Self-Instructional (Workbook, audio/video tapes, etc.)
- Teleconference
- Videoconference
- Web Based Training (Online Training)
- Webinar

Course Start Date: 01/01/2030 (This is the placeholder that Pathlore uses to separate a course from a class.)

Course End Date: The ending date is relative to the placeholder start date of 01/01/2030. For example, a two -day class would have an end date of 01/02/2030.

Training Facility: For Blended Learning or Classroom Instruction, enter “To be determined”. For all others, enter the name of the delivery method.

Training City: For Blended Learning or Classroom Instruction, enter “To be determined”. For all others, enter the name of the delivery method.

Class Size: The maximum/minimum number of participants that can attend the class. The maximum is usually determined by such factors as delivery method, room size and number of instructors. Write in “999” if the class size is unlimited, such as for an online course. The minimum is the fewest number of people required to hold the class. If fewer people enroll than the minimum, the class may be canceled.

Contact Hours: Number of hours the participant is in actual training. This does not include lunch, or breaks. (example – training is from 10 a.m. to 4 p.m. with a 1-hour lunch. Contact hours will be 5 hour)

CEU Type: (# of hours) Number of hours for approved CEU types. NOTE: For ALL Social Work CEUs, only Strategic Development can enter those hours. Please contact Strategic Development for details

- CME I (Continuing Medical Education)
- CME II (Continuing Medical Education)
- Nursing
- Social Work
- Audits
- Government

Class Owner: This field limits who can update this record. Only those people who belong to the group matching the class owner code have update rights.

Responsible Unit: The unit that originated the training or, if the training was developed outside of DCF, the unit that sponsored the training. This is not the unit who is delivering the training.

Info Section:

Purpose: One or two sentences on the rationale for this course. Includes why the participant should take the course. What knowledge or skills the participant will gain. This information appears in the Training Center.

Description: Content of course. Delivery method. Length of course. This information appears in the Training Center

Objectives: Listing of what the trainees should know or should be able to do after they have completed this course.

Prerequisites: Listing of course code numbers of any other courses the trainees must have completed before taking this course. If none are required, write in the word “None.”

Competencies: Listing of competencies addressed by this course. Competencies are identified by number. If none have been identified, write in “None identified at this time.”

Completion Requirements: Write in “Entire Course” unless there is another standard of completion for this course. Example: “Participant must attend five (5) of the six (6) workshops.”

Target Audience: Who should attend or might benefit from the training. If the target audience is broad based, use descriptive terms such as “All Staff,” “All Social Services Staff” or “All Supervisors”. If narrower, use more specific terms such as “PPS social workers who supervise”.

Instructor(s): List the name of the person or persons who will teach this course. If it could be anyone of several instructors, “TBD” may be entered as a placeholder.

Course Notes: Information for participant. (Example: Start or end times that may be different for multi-day classes. Things to bring to class, i.e. Builder’s Handbook, 3-ring binder, etc.)

Optional Section:

Age Specific: If the training specifies a specific age group(s), mark the appropriate category(s): Children, Adolescent, Adult and/or Senior. (Usually only applicable for state hospital courses.)

Charge per Seat: The dollar amount charged for the training for employees (state) and non-state employees (non-state). Only used if changing for the training, otherwise leave blank.

Class Information

New Date:

Revised Date:

Scheduled: **Added:**

(NOTE: This form is not for self-paced trainings such as online and self-instructional courses)

General Information

Course Name:

Course Code:

Class Contact:

Enrollment Close Date:

1st or Only

2nd

3rd

4th

Class or Session

Class or Session

Class or Session

Class or Session

Start Date:

Start Time:

End Date:

End Time:

Training Facility:

Training Facility Address:

Training Facility City:

Training Facility Room:

Class Size – Maximum/Minimum:

Instructor(s):

Delivery Method:

Class Notes:

Equipment Needed:

Optional

Site Contact Person:

Site Contact Phone:

Ext:

Additional Comments/Instructions:

Class Information Instruction Sheet

This form is designed to capture information for a single class but can be used for multiple classes of the same Course if desired.

New Date: [Enter date]: Mark box if this is a brand-new class and enter today's date.

Revised Date: [Enter date]: Mark box if this is a revision of an existing class and enter today's date.

Course Name: Title of the training. This is to be the same as course name in Pathlore database. If a name change is desired, the Course name in Pathlore needs to be updated and saved as a new Generation.

Course Code: The ten-digit code identifying the course in the Pathlore database that is to be used as the template for this class.

Class Contact: Person responsible for questions concerning this class. (Usually the person filling out the form)

Enrollment Close Date: The last date participants may enroll. This can be an actual date of the class or the number of days before the class start date ("03/17/2017" or "5 days before start"). You may leave this field blank if there is no enrollment close date and trainees can enroll up to the point the training occurs.

Start Date: The starting date of the class. Put the starting date in the first column if this is a single session class. If this is a multi-session class, put the start date of each session in the corresponding column. If the form is being used to enter multiple classes, enter the start date of each class in a separate column.

End Date: The ending date of the class. Put the ending date in the first column if this is a single session class. If this is a multi-session class, put the end date of each session in the corresponding column. If the form is being used to enter multiple classes, enter the end date of each class in a separate column.

NOTE: Session dates are used only when class meeting dates are separated by non-class days. Thus, a four-day class running from Monday – Thursday of one week would have only one starting and ending date. A training occurring on each Monday for four weeks would have four starting and ending dates.

Start Time: The starting time of the class.

End Time: The ending time of the class.

NOTE: If a multi-day class has different start and end times on different days enter that information into the Note Section of the class.

Training Facility: The name of the training facility (Topeka Service Center, Wichita Service Center, etc.).

Training Facility Address: The address of the training facility (Example: 500 SW Van Buren, 2601 S. Oliver St., etc.).

Training Facility City: The name of the city where the class is being held.

Training Facility Room: The name of the room in the training facility where the class is being held. (Room B, Wheat Room, etc.)

Class Size: The maximum/minimum number of trainees that can participate in the class. The maximum is usually determined by such factors as delivery method, room size and number of instructors. Write in "999" if the class size is unlimited. The minimum is the fewest number of people required to hold the class. If fewer people enroll than the minimum, the class may be canceled.

Instructor(s): List the name(s) of the person or persons who will teach this class.

Delivery Method: Enter the method of delivering from this list that best matches the training –

- Blended Learning (Course includes online and instructor lead components)
- Classroom Instruction
- Conference
- Individual Instruction (one-on-one training)
- Online Virtual Classroom (Ex: Adobe Connect, Live Meeting)
- Teleconference
- Videoconference

Class Notes: Information for participants. (Start or end times that may be different on multi-day classes; things to bring to class, Builder's Handbook, 3-ring binder, etc.).

Equipment Needed: Any equipment the instructor may need (computer, projector, etc.).

Site Contact Person: The site contact person responsible for questions concerning the site and equipment.

Site Contact Phone: Phone number of site contact person.

Additional Comments: Any additional information or instructions for the person entering the class into Pathlore.

Pathlore Info Section for Course and Class Definitions

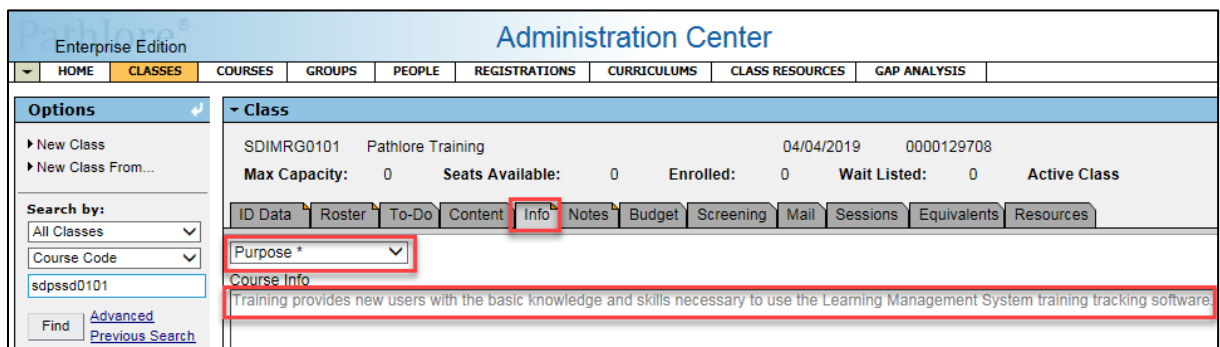
The Info Section currently has nine sub-sections. With the exception of Course Notes, most sub-sections should be completed for all courses. This is especially true of the Description and Objectives sub-sections. These sub-sections provide valuable information to the participant about the course or class and are visible in the Training Center. When classes are created from Courses, the information in the information section transfers to the class.

PURPOSE

The Purpose provides the rationale for taking the course. It should answer the questions:

- Why should the participant take the course?
- What essential knowledge or skills should the participant gain from this experience?

Example:



The screenshot shows the 'Administration Center' interface. The 'Info' tab is selected, and the 'Purpose' field is highlighted with a red box. The text in the 'Purpose' field is: "Training provides new users with the basic knowledge and skills necessary to use the Learning Management System training tracking software".

COURSE DESCRIPTION

The Course Description provides general information regarding the topics and content addressed in the course. It answers the “how” and “what” questions:

- How is this course delivered?
- What topics will be covered?
- How long is the course?

NOTE: The Course Description information for both the Course and Class appear in the auto email for Confirmation-Registration.

OBJECTIVES

Objectives are specific statements of what the participant will learn or be able to perform at the end of the course. They should read: **Upon completion of this course, participant will** and then lists each objective which will be achieved. The objectives should include such terms as “Summarize,” “Differentiate,” “Identify,” etc.

PREREQUISITES

The Prerequisites subsection provides a list of anything a participant must have before taking this course. The course(s) required as prerequisites should be identified by both title and course code.

In some cases, the prerequisite may be more general in nature, such as a requiring a basic knowledge on how to use a computer rather than a requirement to have taken a specific computer course.

If the course does not have a prerequisite, enter “None.”

For additional information about requiring a prerequisite for a course before a participant can enroll, please contact Strategic Development at DCF.LMSsupport@ks.gov. The telephone number is (785) 296-4327.

COMPETENCIES

Competencies define the skill and knowledge which the participant will gain from the training.

COMPLETION REQUIREMENT

Completion requirement tells the participant what is needed to complete the course. The requirement can be phrased in terms of time, sections or score.

For example:

The participant must attend both days of this two-day course.

The participant must attend five of the six workshops during this two-day conference.

The participant must score at least 80 percent on the final quiz.

TARGET AUDIENCE

The target audience is who should attend or who might benefit from the course.

Some examples:

- This course is mandatory for all Department for Children and Families employees.
- Supervisors.
- Anyone who has contact with customers.

INSTRUCTOR

This section allows free form entry. Information in this section could include the trainer's title and even a short biography, or a curriculum vitae.

If a variety of trainers teach this course and the specific trainer is not assigned until the class is created, enter the trainer when as a class is created.

COURSE NOTES

This is an optional field in which miscellaneous information can be entered. Course Notes in Courses are separate from Course Notes in Classes.

Course Notes appear in auto email as follows:

Confirmation -Registration

- Course notes within a Course and within a Class appear in these auto-mails

Confirmation-Cancellation

- Course notes within the Class appear in these auto-emails. You can document why a class was cancelled.

Training-Reminder

- Course notes within the Class as well as Class Access Information section appear in the training reminder auto emails.

Here are examples of information which might be in Course notes within a Course

- Please bring two examples of supervisory challenges for group discussion.
- As this training will require some physical activity, please wear comfortable clothing.

Examples of information which might be in a Course notes within a Class

- For this training there will be a half-hour lunch break. A refrigerator is provided if you wish to bring your lunch.
- The room temperature is usually on the colder side. Bring a jacket if you wish.

Course Generations

One of the features of Pathlore is the ability to capture a ‘new’ generation of a course whenever it is updated. A course generation is a snapshot of certain course data; what the course consisted of at a specific time. From time to time, a course may require an update. For example: The number of contact hours or an objective, etc. Whatever the change, Pathlore can document the change by capturing the ID Data and the Info Sections as they were before the change was made.

Both online and instructor-led courses can have generations.

Minor changes to a course such as correction of typos or adding some missing information does not require a new generation.

Anytime a new generation is created there should be an entry in the Note Section concerning the change. Careful and detailed documentation of the change will assist in capturing history. This entry provides documentation of the changes made. There are a couple of reasons as to why you should document the changes being made when creating a new generation:

- Documentation provides exact information as to what was changed.
- Even when the change is obvious, the impact and reason for the change may not be clear. For example, a reduction of contact hours from four to three does not by itself communicate what may have been dropped from the course and why the change was made.

The entry should include:

- The date of the change (which should correlate with the date the new generation was created).
- The name of the person requesting the change (Course developer, content expert, etc.).
- The specifics of the change (fields values changed, objectives added or dropped, content added or dropped, etc.).
- The name of the Pathlore administrator who made the changes.

Example:

New generation created on 09/05/2017

Generation created at the request of Kathy Evers of Strategic Development

Number of contact hours changed from 4.0 to 3.0 hours. This was the result of dropping the small group discussion and sharing of team building scenario. Team building has been removed from the list of course objectives. —Kenneth Morris 09/05/2017

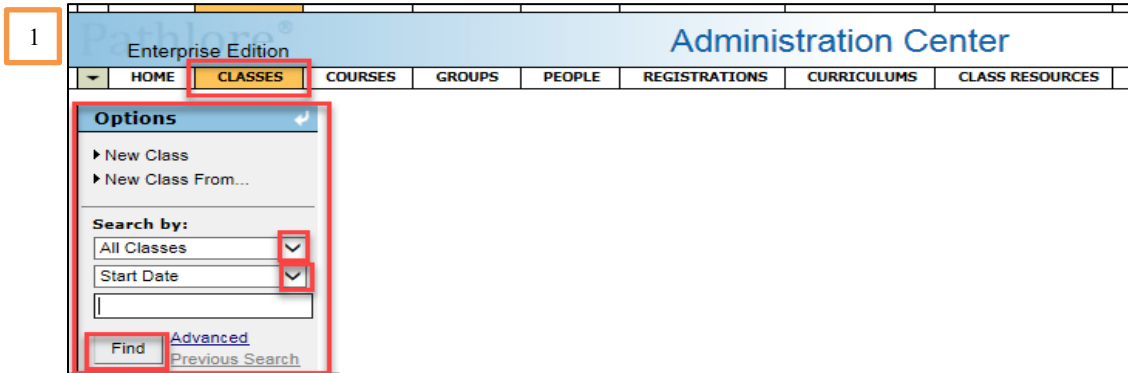
If the training has significantly changed and is covering different training needs, a new course number should be assigned versus creating a new generation of the existing course.

Questions

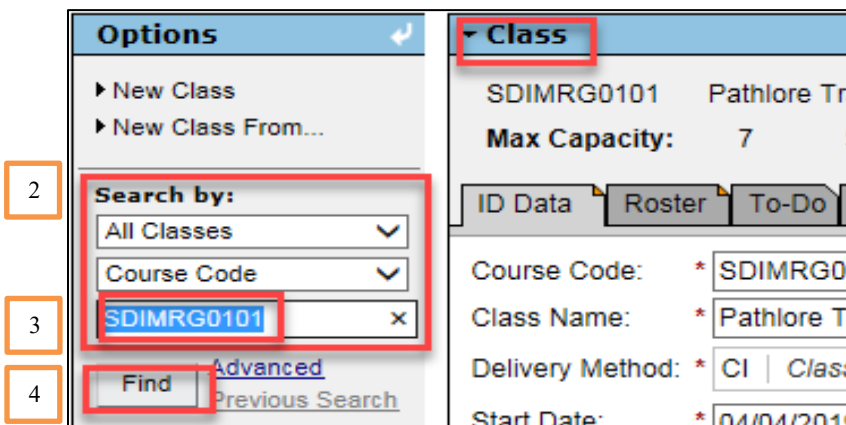
Any questions concerning creating course numbers or course generations should be directed to Strategic Development at DCF.LMSsupport@ks.gov. The telephone number is (785) 296-4327.

Canceling a Class

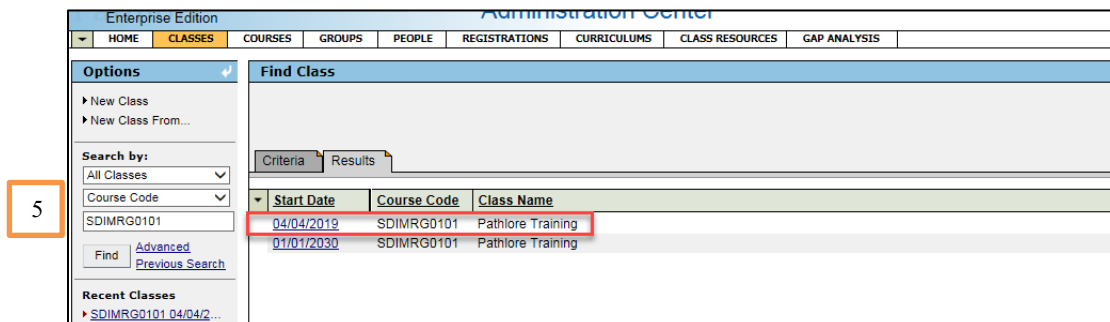
1. Select **Classes** from the tool bar.



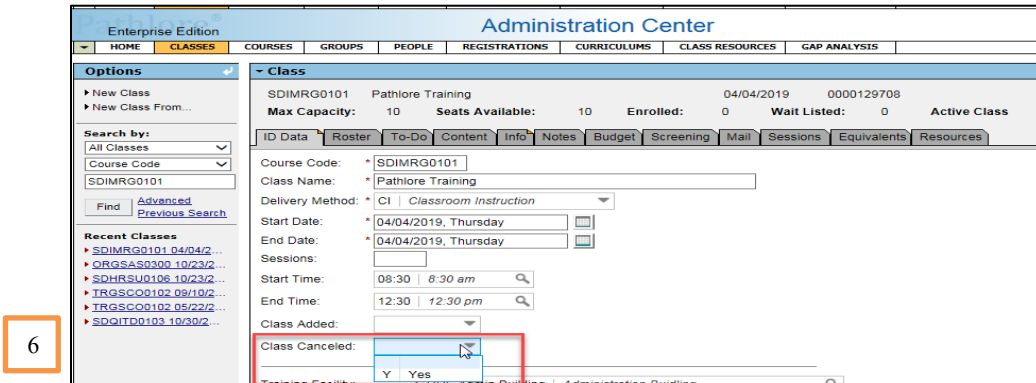
2. From **Options** panel under **Search By:** use the drop down and select **Course Code**.
3. Enter the class **Course Code**.
4. Select **Find**.



5. Scroll through to find the appropriate class to select the class you want to cancel. Double click on the date to open the class.



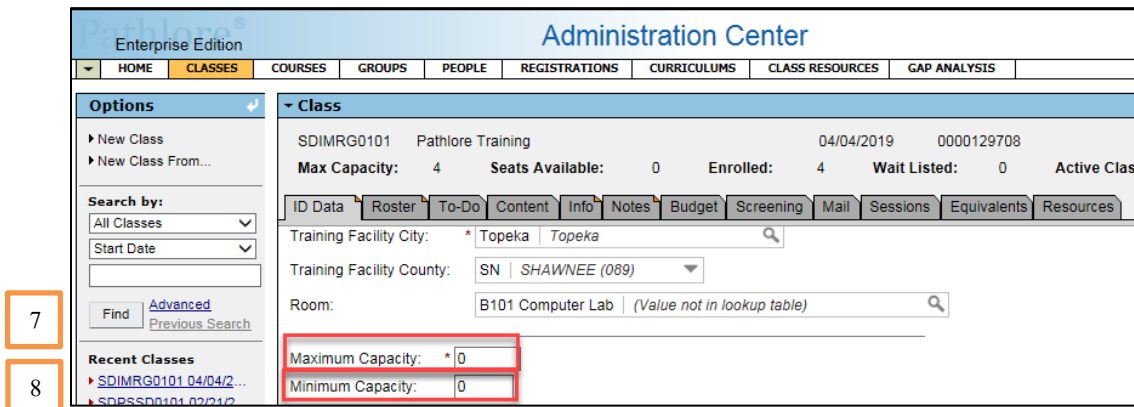
6. Scroll down to the **Class Canceled** field and select 'Y/Yes' from the drop-down.



The screenshot shows the 'Administration Center' interface for class management. The 'Class' details for SDIMRG0101 are visible, including 'Pathlore Training' and '04/04/2019'. The 'Class Canceled' field is highlighted with a red box, and a dropdown menu is open showing 'Y/Yes' selected. A callout box with the number '6' is positioned to the left of the field.

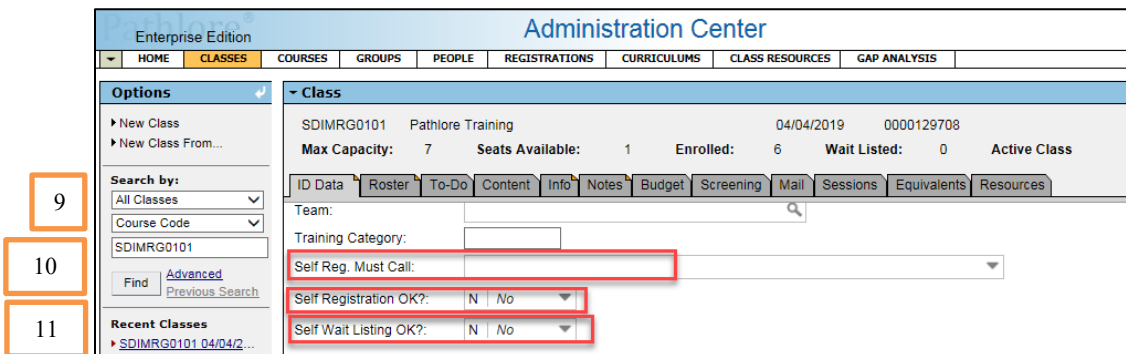
Change the following additional fields in the training:

7. **Maximum Capacity** – change this value to 0.
8. **Minimum Capacity** – change this value to 0.



The screenshot shows the 'Administration Center' interface for class management. The 'Class' details for SDIMRG0101 are visible, including 'Pathlore Training' and '04/04/2019'. The 'Maximum Capacity' and 'Minimum Capacity' fields are highlighted with red boxes and set to '0'. Callout boxes with numbers '7' and '8' are positioned to the left of these fields.

9. **Self-Registration Must Call** – select the blank space to delete any information in that field.
10. **Self-Registration OK?** – change this field to N.
11. **Self-Wait Listing OK?** - change this field to N.



The screenshot shows the 'Administration Center' interface for class management. The 'Class' details for SDIMRG0101 are visible, including 'Pathlore Training' and '04/04/2019'. The 'Self-Registration Must Call', 'Self-Registration OK?', and 'Self-Wait Listing OK?' fields are highlighted with red boxes. Callout boxes with numbers '9', '10', and '11' are positioned to the left of these fields.

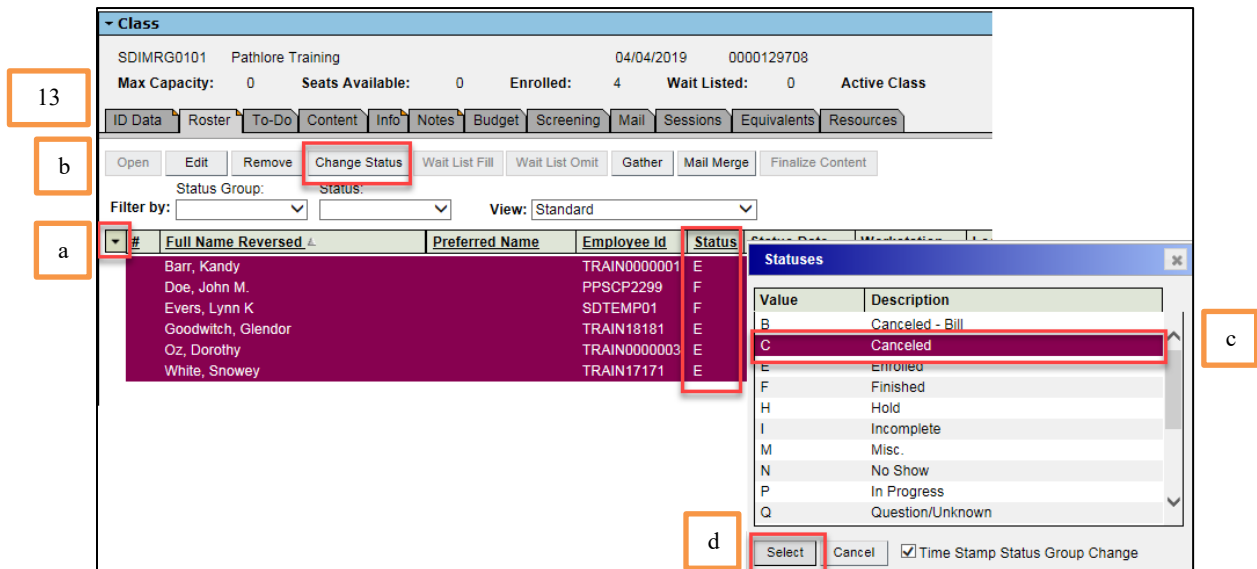
12. Select the **Save** icon on the toolbar upper right-hand corner.



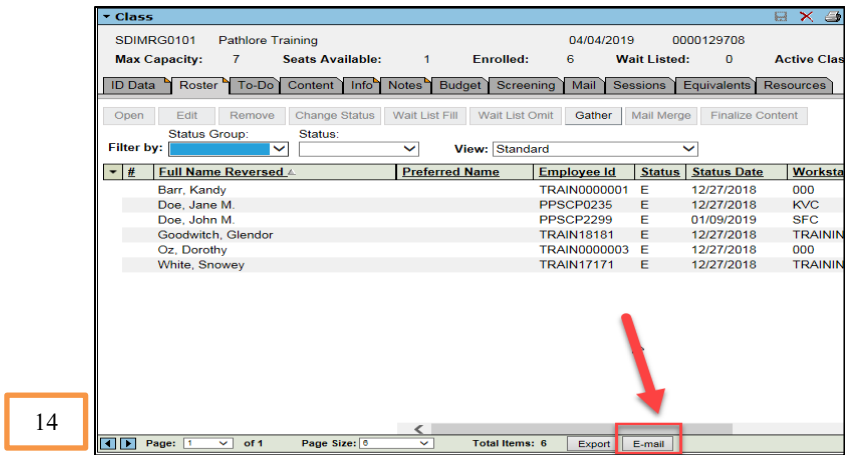
To complete the cancel class process:

13. Select the Roster tab to check for any participants enrolled in the class.

- a. Highlight any participant with a status other than “C” by selecting the first name listed, holding down the CTRL key and continue selecting each name needing to be canceled out of the class.
- b. Once all names needing to be cancelled are selected, you will select the **Change Status** button. The **Statuses** pop up window will open.
- c. Select ‘C’ for Canceled.
- d. Choose Select. The change is automatic. You do not need to Save.

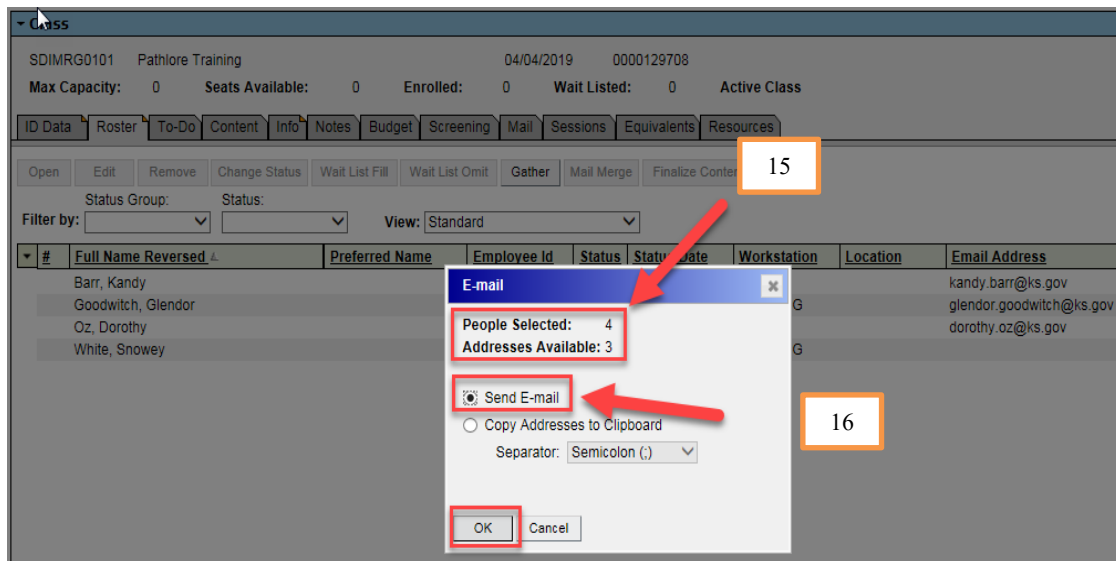


14. To send email notices to the participants informing them the class has been canceled, select the **E-mail** button at the bottom of the Roster screen.



15. The E-mail pop-up will open. Double check to see if the number of **People Selected** and the number of **Addresses Available** are the same number. If these numbers do not match you will need to double check that each registered participant has an email address. (you may check by scrolling right and looking under email address)

16. Select **OK**.



17. Your email service (i.e. Outlook) will open and populate with the email address of the selected participants, in the **To:** field.

18. If there is a person who was omitted in the **To:** of your email, manually add that person's email address.

NOTE: If you discover a person with an incorrect or missing email, please make the appropriate correction in the Person record.

17-18

19

To...

Cc...

Send

Subject

We regret to inform you that Pathlore Training scheduled for 4/4/19 has been canceled due to inclement weather. At this time, no other class is scheduled. As soon as another class is scheduled, an announcement will be sent. We apologize for any inconvenience.

If you have any questions, please contact me at Robynn.Bears@ks.gov.

19. Continue by adding the message in the email.
20. **Notes tab:** Add a note, in the Notes section of the class. This information should include details about the cancellation as well as about an email being sent to those enrolled. Enter your name and the date of the entry. See example.

Policy for Adding New People Temporary Employee IDs

1. **DCF Employees** - DCF Pathlore administrators should create a new person record ONLY for DCF employees.
2. **Non-DCF employees** - Non-DCF employees (from other state agencies or from outside Kansas state government) should not be added by Pathlore administrators. Requests should be made to DCF.LMSsupport@ks.gov to enter these people into Pathlore. The decision whether to add such people to Pathlore concerns issues of seat usage and contractual costs. There may be another way to provide training to such persons outside of Pathlore.
3. **Search for a pre-existing person record** - The person records should be searched diligently for a pre-existing person record for a DCF employee. It is important to avoid record duplication because this directly affects seat usage numbers.
4. **Create a new person record** -, A new person record can be created for a DCF employee using their Kansas employee ID number
5. **Avoid creating records with a temporary ID** – A new person record with a temporary ID should not be created as a standard operating procedure; it is an exceptional case that can often be avoided. Records with temporary IDs should not be created merely to get the person in Pathlore as soon as possible when that employee should not even be accessing trainings yet (i. e., before their official start date).
6. **Early additions to Pathlore** – If a new person record is created before a person has started working, the record should be inactivated until the person begins employment. This should be done by setting the Inactivation Date in the person record to the date the record is created. The inactivation date can be removed once the person starts working at DCF and needs to access trainings.
7. **Temporary ID scheme** – If a person begins work at DCF but does not yet have a Kansas ID number, a temporary ID number can be created using the following scheme:

TEMPID + first letter of first name + first letter of last name + last 2 digits of Region/Division Code + second letter of first name

For example, Susan Jones in the KC Region would receive: TEMPIDSJ74U

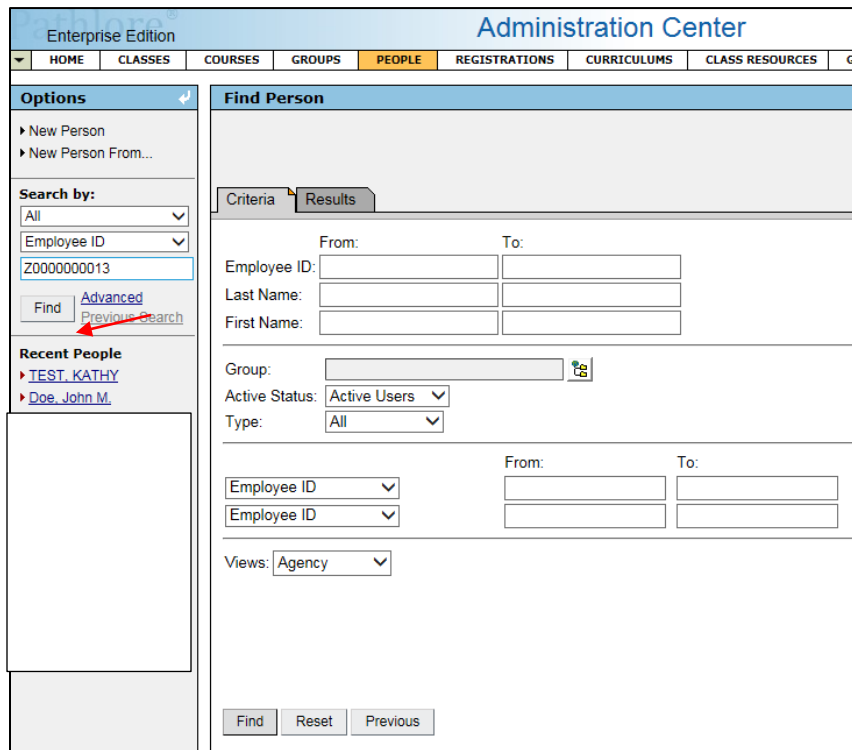
When you add a new person to Pathlore please complete the following fields:

- Employee ID
- Last and First Name
- Agency
- Region/Division
- Employee e-mail
- Supervisor e-mail
- Agency start date
- Manager (enter the supervisor)

Advanced Searches

Advanced Searches may be performed when you are needing to narrow down the search criteria.

The Advanced search button is in the Options window to the left of the Find button.

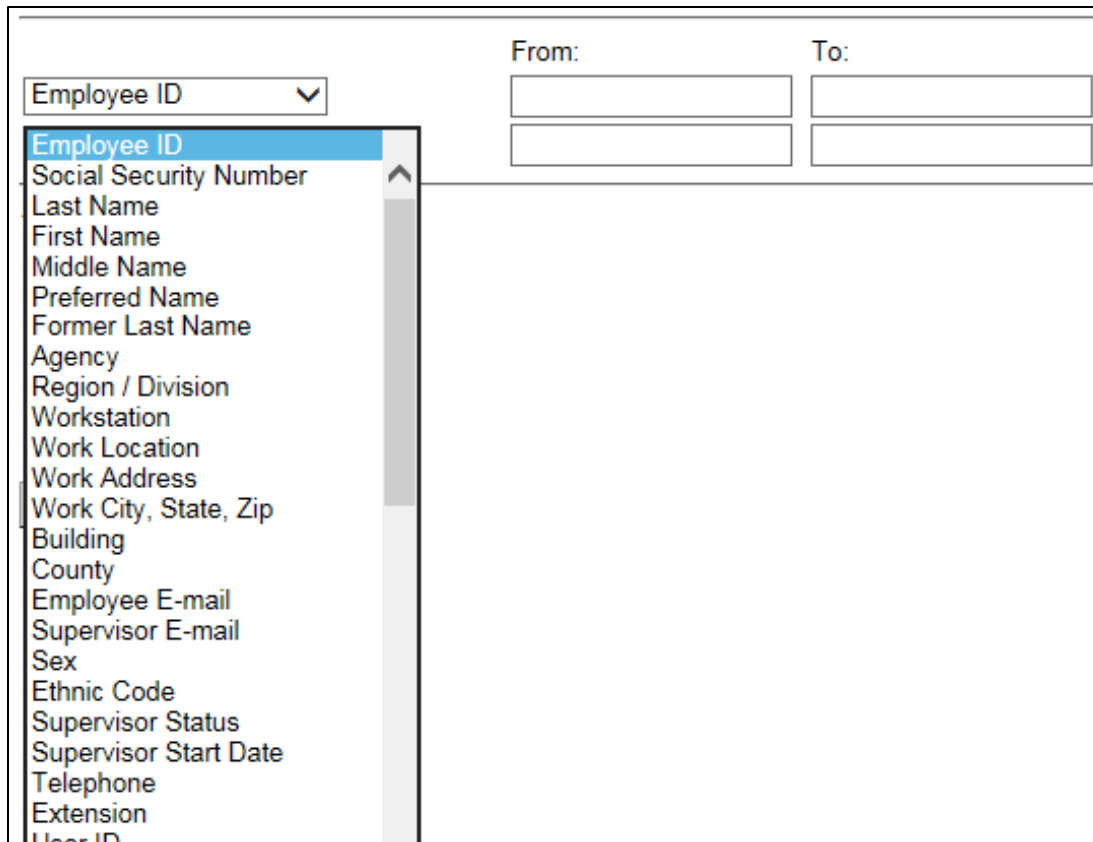


You may one field or more than one of the fields together, to narrow you search. In Pathlore the % is used as a wildcard value.

The labeled options in the Advanced search are:

- Employee ID
- Last Name
- First Name
- Group
- Active Status
- Type

The two fields labeled Employee ID, can be changed by using the drop-down menu. This provides you several other options to narrow your search.



The screenshot shows a search interface with a dropdown menu on the left and search criteria fields on the right. The dropdown menu is open, showing a list of fields including Employee ID, Social Security Number, Last Name, First Name, Middle Name, Preferred Name, Former Last Name, Agency, Region / Division, Workstation, Work Location, Work Address, Work City, State, Zip, Building, County, Employee E-mail, Supervisor E-mail, Sex, Ethnic Code, Supervisor Status, Supervisor Start Date, Telephone, Extension, and User ID. The 'Employee ID' field is selected in the dropdown. To the right, there are two columns of search criteria: 'From:' and 'To:'. Each column has two empty input boxes for defining the search range.

Here are a couple examples of a search:

People Tab. Searching for all those with the Last Name of Test who work for DCF.

- a) Enter Test in the Last name field,
- b) In the 1st Employee ID box use the drop-down and select Agency.
- c) Select Find.


| | | | | | |
|--|----------------------|-------|----------------------------|-----|----------------------|
| Employee ID: | <input type="text"/> | From: | <input type="text"/> | To: | <input type="text"/> |
| Last Name: | test | | | | |
| First Name: | <input type="text"/> | | | | |
| Group: | <input type="text"/> | | | | |
| Active Status: | Active Users | | | | |
| Type: | All | | | | |
| Agency | <input type="text"/> | From: | 629 Kansas Dept. for Chi | To: | <input type="text"/> |
| Employee ID | <input type="text"/> | | | | <input type="text"/> |
| Views: | Agency | | | | |
| <input type="button" value="Find"/> <input type="button" value="Reset"/> <input type="button" value="Previous"/> | | | | | |

Results: A list of Active Users who have the last name of Test and work for DCF.

| Criteria | | Results | | | | |
|----------------------|------------|----------------|-----------------|-----------------|-------------|-------|
| Last Name | First Name | Preferred Name | Former Last Nam | Inactivation Da | Employee ID | Agenc |
| TEST | DEREK | | | | Z0000000012 | 629 |
| TEST | ELIZABETH | | | | Z0000000014 | 629 |
| TEST | KATHY | | | | Z0000000013 | 629 |
| TEST | LORI | | | | Z0000000011 | 629 |
| TEST | PERSON | | | | Z0000000001 | 629 |
| TEST | ROBYNN | | | | Z0000000016 | 629 |
| TEST | SUPERVISOR | | | | Z0000000002 | 629 |

Additional example. If you are having difficulty locating a person in Pathlore, and they have a rare first name you can search by first name only.

- a. Enter the First Name in the From box.
- b. Select Find

| | | | |
|--|----------------------|---------|---|
| Criteria | | Results | |
| From: | | To: | |
| Employee ID: | <input type="text"/> | | <input type="text"/> |
| Last Name: | <input type="text"/> | | <input type="text"/> |
| First Name: | Supervisor | | <input type="text"/> |
| Group: | <input type="text"/> | |  |
| Active Status: | Active Users | | <input type="text"/> |
| Type: | All | | <input type="text"/> |
| Employee ID | <input type="text"/> | From: | <input type="text"/> |
| Employee ID | <input type="text"/> | | <input type="text"/> |
| Views: | Agency | | <input type="text"/> |
| <input type="button" value="Find"/> <input type="button" value="Reset"/> <input type="button" value="Previous"/> | | | |

Results: The screen will populate with the person with a first name of Supervisor.

| | | |
|-------------------------|--|-----------------------|
| Person | | |
| TEST | SUPERVISOR | Z0000000002 |
| Workstation: | | Work Location: |
| ID Data | Transcript | Plan |
| | Groups | Curriculums |
| | Notes | |
| Employee ID: | * Z0000000002 x | |
| Social Security Number: | <input type="text"/> | |
| Last Name: | * TEST | |
| First Name: | * SUPERVISOR | |
| Middle Name: | <input type="text"/> | |
| Preferred Name: | <input type="text"/> | |
| Former Last Name: | <input type="text"/> | |
| Agency: | * 629 Kansas Dept. for Children and Family | |
| Region / Division: | * 62921 Strategic Development | |
| Workstation: | <input type="text"/> | |

Classes Tab

To search for a particular class that is being offered after a certain date:

- Enter the Course Code in the From field.
- In the Start Date field, choose “on or after” and enter a date.
- Choose Find.

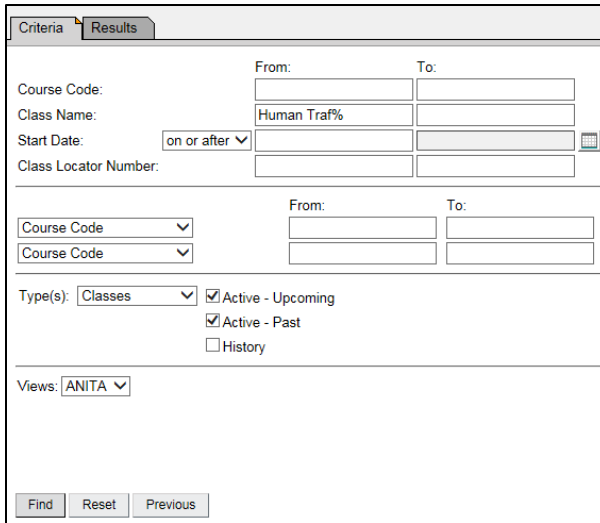
| Criteria | | Results | |
|--|------------------|---|--|
| Course Code: | From: SDQITD0103 | To: | |
| Class Name: | | | |
| Start Date: | on or after | 09/19/19 | |
| Class Locator Number: | | | |
| Course Code | From: | To: | |
| Course Code | | | |
| Type(s): | Classes | <input checked="" type="checkbox"/> Active - Upcoming | |
| | | <input checked="" type="checkbox"/> Active - Past | |
| | | <input type="checkbox"/> History | |
| Views: | ANITA | | |
| <input type="button" value="Find"/> <input type="button" value="Reset"/> <input type="button" value="Previous"/> | | | |

Results: all the classes for that Course Code which are offered after 09/19/2019.

| Criteria | | Results | | | | | |
|----------------------------|-------------|---|----------|------------|------------|----------|---------------|
| Start Date | Course Code | Class Name | Canceled | End Date | Start Time | End Time | Training City |
| 10/04/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 10/04/2019 | 09:00 | 12:00 | Wichita |
| 10/04/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 10/04/2019 | 13:00 | 16:00 | Wichita |
| 10/09/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 10/09/2019 | 13:00 | 16:00 | Chanute |
| 10/18/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 10/18/2019 | 09:00 | 12:00 | Kansas City |
| 10/21/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 10/21/2019 | 09:00 | 12:00 | Topeka |
| 10/21/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 10/21/2019 | 13:00 | 16:00 | Topeka |
| 12/04/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 12/04/2019 | 09:00 | 12:00 | Kansas City |
| 12/09/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 12/09/2019 | 09:00 | 12:00 | Wichita |
| 12/09/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 12/09/2019 | 13:00 | 16:00 | Wichita |
| 12/16/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 12/16/2019 | 09:00 | 12:00 | Topeka |
| 12/16/2019 | SDQITD0103 | Maximizing Your Strengths to Strengthen Kansas Families-Phase 1 | | 12/16/2019 | 13:00 | 16:00 | Topeka |

Example: You can't locate a class with a common name in the title. You are trying to find a Human Trafficking class and you are not sure of the title of the training.

- a. Enter Human Traf% in the Class Name Field
- b. Select Find



Results: The screen will populate with all training that have the criteria you defined with the % wildcard.

| Start Date | Course Code | Class Name | Canceled | End Date |
|----------------------------|-------------|--|----------|------------|
| 07/28/2008 | KCGSCR9999 | HUMAN TRAFFICKING - HOPE HOUSE | | 07/28/2008 |
| 04/13/2017 | KVPSHT0101 | Human Trafficking and Child Welfare | | 04/13/2017 |
| 11/09/2017 | KVPSHT0101 | Human Trafficking and Child Welfare | | 11/09/2017 |
| 10/31/2018 | KVPSHT0101 | Human Trafficking and Child Welfare | | 10/31/2018 |
| 03/28/2019 | KVPSHT0101 | Human Trafficking and Child Welfare | | 03/28/2019 |
| 03/28/2019 | KVPSHT0101 | Human Trafficking and Child Welfare | | 03/28/2019 |
| 05/15/2019 | KVPSHT0101 | Human Trafficking and Child Welfare | | 05/15/2019 |
| 08/21/2019 | KVPSHT0101 | Human Trafficking and Child Welfare | | 08/21/2019 |
| 10/31/2018 | KVPSHT0102 | Human Trafficking: Rapid Responders | | 10/31/2018 |
| 09/30/2013 | PPPSHT0201 | Human Trafficking, TOT | | 10/01/2013 |
| 01/04/2019 | PPSSOSO111 | Human Trafficking Understanding the Dynamics Protection Reporting Center | | 01/04/2019 |
| 01/08/2019 | PPSSOSO111 | Human Trafficking Understanding the Dynamics Protection Reporting Center | | 01/08/2019 |
| 01/11/2019 | PPSSOSO111 | Human Trafficking Understanding the Dynamics Protection Reporting Center | | 01/11/2019 |
| 01/17/2019 | PPSSOSO111 | Human Trafficking Understanding the Dynamics Protection Reporting Center | | 01/17/2019 |
| 01/24/2019 | PPSSOSO111 | Human Trafficking Understanding the Dynamics Protection Reporting Center | | 01/24/2019 |
| 01/31/2019 | PPSSOSO111 | Human Trafficking Understanding the Dynamics Protection Reporting Center | | 01/31/2019 |
| 12/10/2012 | PPSTCW0506 | Human Trafficking: General Overview | | 12/10/2012 |
| 12/11/2012 | PPSTCW0506 | Human Trafficking: General Overview | | 12/11/2012 |
| 12/12/2012 | PPSTCW0506 | Human Trafficking: General Overview | | 12/12/2012 |

