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# Mississippi Management and Reporting System

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**Department of Finance and Administration**

<b>MMRS MASH/Training Materials</b>		
8202	LSO Training Coordinator Guidelines	Date Revised: 06/04/2019
		Version: 4

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## Magic Portal Logon Information

The website address used to access MAGIC is: <https://portal.magic.ms.gov/iri/portal>.

**Note: If you have difficulty with viewing the training course, please review [MAGIC Technical Requirements](#) on the MMRS website for compatibility issues.**

If you have problems with your password, call the MMRS Call Center at 601-359-1343. **Select Option 1 (Security) Sub-option 1 (MAGIC) or e-mail [MASH@dfa.ms.gov](mailto:MASH@dfa.ms.gov).**



Having password problems? Please click on this [link](#) for help...

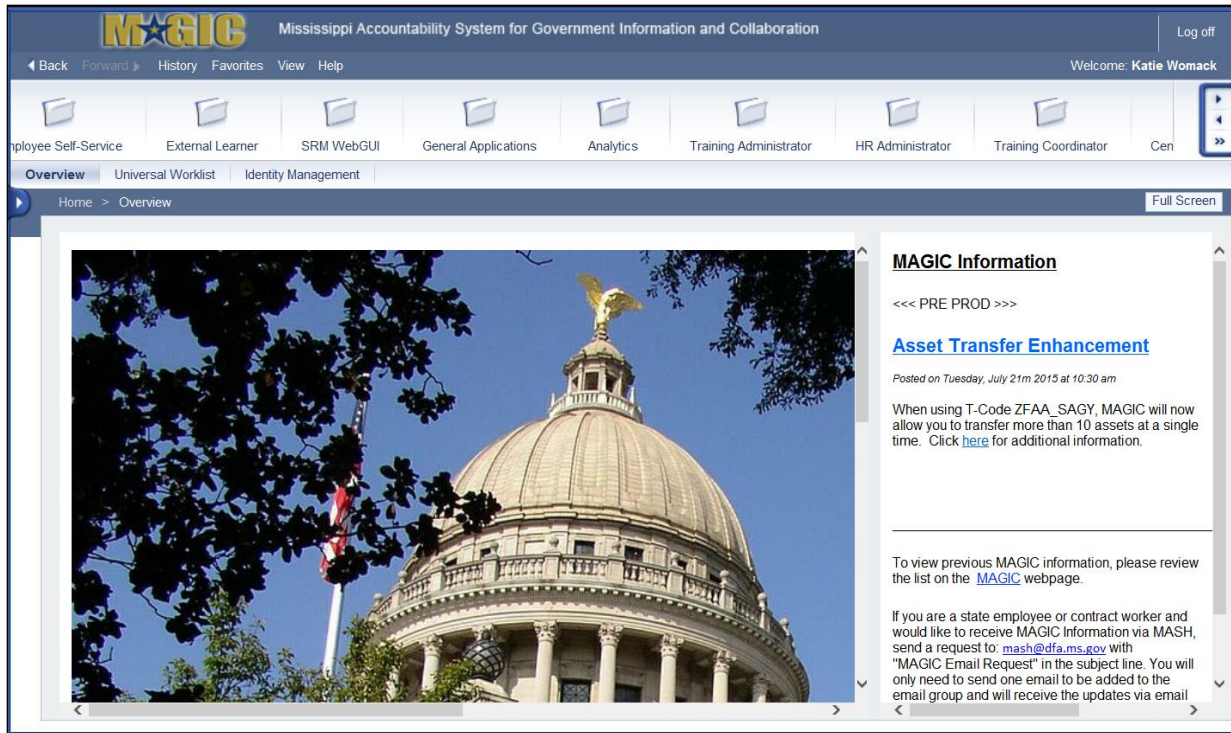
User \*

Password \*

MAGIC is the Mississippi Accountability System for Government Information and Collaboration.

If you need access or additional information please go to the <http://www.mmrs.state.ms.us> website.

Once you log into MAGIC the following screen will appear.

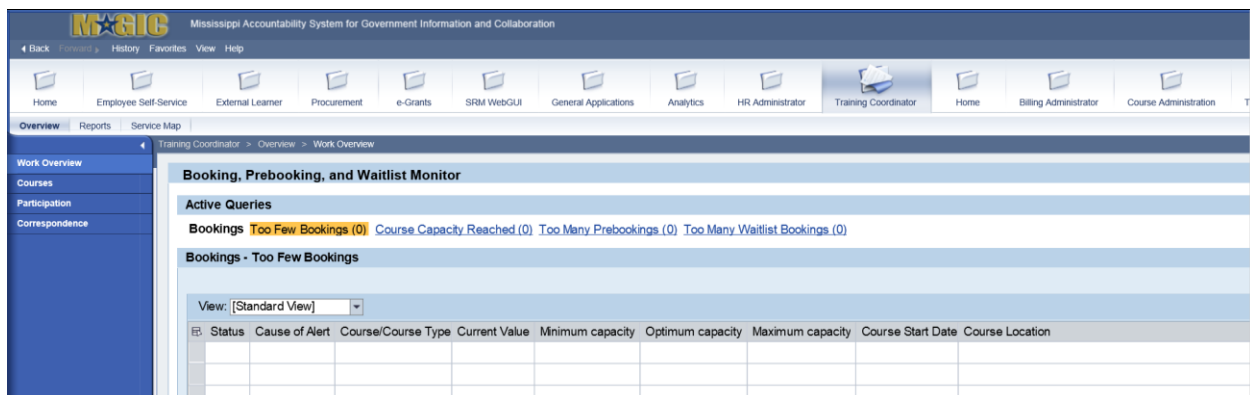


### Book an Employee in Course

As your Agency's Training Coordinator, you will have the ability to directly book one or more of your employees into training sessions.

**NOTE:** Participants can only sign up for one occurrence of a course; they cannot choose several occurrences at the same time.

Your Action...	System Response...
1. Select the <b>Training Coordinator</b> tab.	The Work Overview screen will appear.



Your Action...	System Response...
2. Select the <b>Courses</b> tab.	The Worklist of Courses screen will appear.

**Worklist of Courses**

Active Queries  
 Courses **This Week (373)** Next 2 Weeks (298) This Month (460) Next Month (0)  
 Course Follow-up Last 2 Weeks (0) Last Month (0)

Courses - This Week

View: [Standard View] | Change Course | Manage Participation | Correspondence Worklist | Follow-Up | Firmly Book | Print Version | Export

Course Name	Status of Course Preparation	Capacity	Start Date, Time	Location	Course Language	De
ASCP ONLINE ORIENTATION	◇	00				Sta
PROCUREMENT OVERVIEW & NAV-ELEARNING	◇	00				Sta
EMPLOYMENT DISC & WORKPLACE HARR	◇	00				Sta
APPROVAL USING WORKFLOW -ELEARNING	◇	00				Sta
BUSINESS ANALYTICS BASIC USER -ELEARNING	◇	00				Sta
FIXED ASSET REPORTING -ELEARNING	◇	00				Sta
PROC OVERVIEW AND NAV -ELEARNING	◇	00				Sta
SHOPPING CART PROCESSING -ELEARNING	◇	00				Sta
GOODS RECEIPT -ELEARNING	◇	00				Sta
VEHICLE & MAINTANENCE REQ -ELEARNING	◇	00				Sta

Your Action...	System Response...
3. Select the <b>Manage Course Participation</b> tab.	The Manage Course Participations screen will appear.


**Manage Course Participations**

Continue

Period: 10/20/1900 - 12/07/2019 [Change Period](#)

Search in Course Catalog  
 Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
Legacy Conversion			01/01/1900	
SOMS Catalog			01/01/1900	
Unassigned Course Types				

Your Action...	System Response...
4. Select the  next to the <b>SOMS Catalog</b> .	A list of agencies providing training will appear.


**Manage Course Participations**

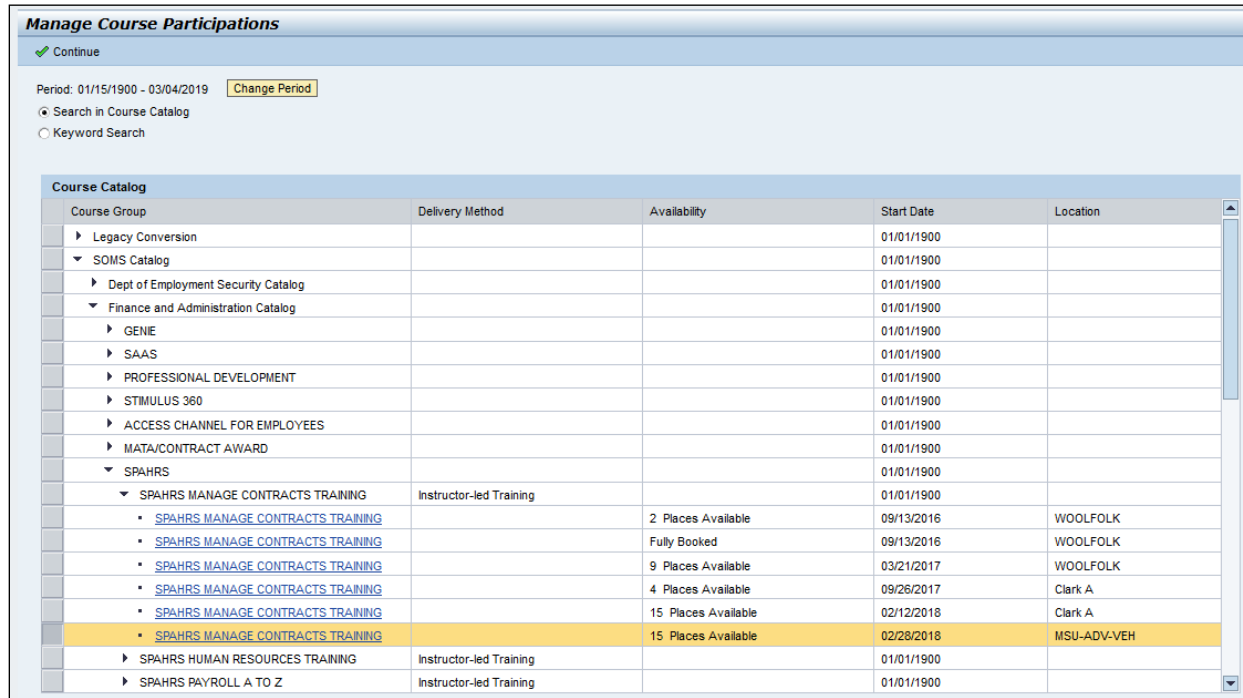
Continue

Period: 01/15/1900 - 03/04/2019 [Change Period](#)

Search in Course Catalog  
 Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
Legacy Conversion			01/01/1900	
SOMS Catalog			01/01/1900	
Dept of Employment Security Catalog			01/01/1900	
Finance and Administration Catalog			01/01/1900	
Dept of Human Services Catalog			01/01/1900	
MS Development Authority Catalog			01/01/1900	
Department of Health Catalog			01/01/1900	
Public Employees Retirement Sys. Catalog			01/01/1900	
State Personnel Board Catalog			01/01/1900	
SPB ADMINISTRATORS ONLY			01/01/1900	
Information Technology Services Catalog			01/01/1900	
Unassigned Course Types				

Your Action...	System Response...
5. Select the  next to agency providing the training course.	A list of training Course Groups will appear.  Browse the Course Catalog for the course, or select the radio button for “Keyword Search.” The results of your search are displayed in a window on the same screen.





**Manage Course Participations**

Continue


Period: 01/15/1900 - 03/04/2019 [Change Period](#)

Search in Course Catalog  
 Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
Legacy Conversion			01/01/1900	
SOMS Catalog			01/01/1900	
Dept of Employment Security Catalog			01/01/1900	
Finance and Administration Catalog			01/01/1900	
GENE			01/01/1900	
SAAS			01/01/1900	
PROFESSIONAL DEVELOPMENT			01/01/1900	
STIMULUS 360			01/01/1900	
ACCESS CHANNEL FOR EMPLOYEES			01/01/1900	
MATA/CONTRACT AWARD			01/01/1900	
SPAHRS			01/01/1900	
SPAHRS MANAGE CONTRACTS TRAINING	Instructor-led Training		01/01/1900	
• SPAHRS MANAGE CONTRACTS TRAINING		2 Places Available	09/13/2016	WOOLFOLK
• SPAHRS MANAGE CONTRACTS TRAINING		Fully Booked	09/13/2016	WOOLFOLK
• SPAHRS MANAGE CONTRACTS TRAINING		9 Places Available	03/21/2017	WOOLFOLK
• SPAHRS MANAGE CONTRACTS TRAINING		4 Places Available	09/26/2017	Clark A
• SPAHRS MANAGE CONTRACTS TRAINING		15 Places Available	02/12/2018	Clark A
• SPAHRS MANAGE CONTRACTS TRAINING		15 Places Available	02/28/2018	MSU-ADV-VEH
SPAHRS HUMAN RESOURCES TRAINING	Instructor-led Training		01/01/1900	
SPAHRS PAYROLL A TO Z	Instructor-led Training		01/01/1900	

Your Action...	System Response...
6. Select the  next to the Course Group you would like your employees to attend.	A list of training dates will appear.
7. Select the  next to the Course and training date you would like your employee(s) to attend.	The course is highlighted.
8. Select <b>Continue</b> at the top of the screen.	The Manage Course Participations screen will appear.

Your Action...	System Response...
9. Select <b>Book Additional Participants</b> .	The Book Additional Participants screen will appear.

Your Action...	System Response...
10. Once you click on the on the first row by Participant, select the 	The Select Participant screen will appear.

The screenshot shows a software window titled "Select Participants". At the top, there is a "Participant" section with a "Search Term:" text box. Below that is a "Select Participant Type" section with a dropdown menu currently showing "Person". A yellow "Find" button is positioned below the dropdown. Underneath is a "List" section containing a table with three columns: "Participant", "Participant Type", and "Organization". The table is currently empty. At the bottom left of the window is a yellow "Select" button, and at the bottom right is a yellow "Close" button.

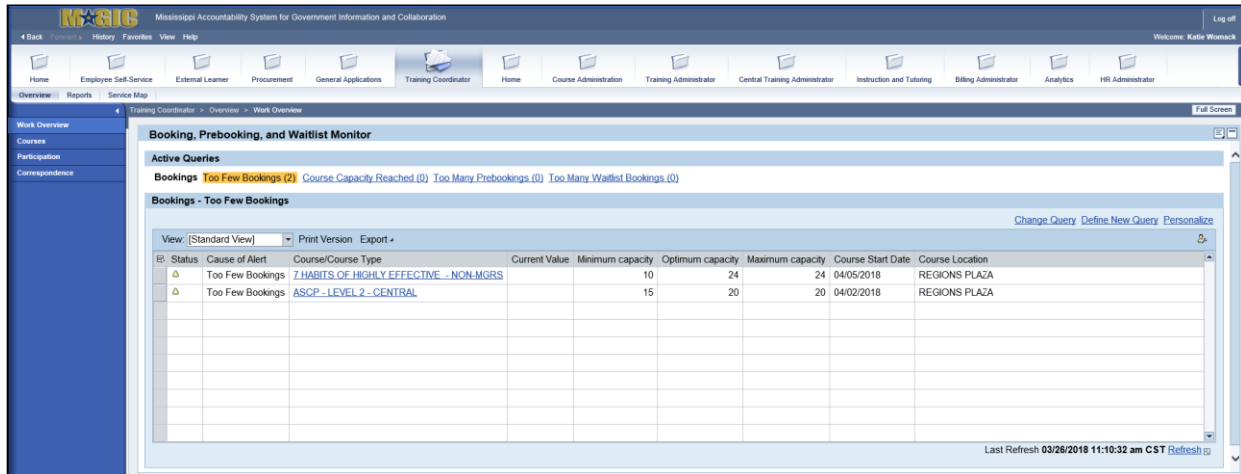
Your Action...	System Response...
11. Enter the last Name of the employee in the search term box.	
12. <b>Select Participant Type</b> as person and select <b>Find</b> .	The person will be displayed.
13. Highlight the person to be added to the course and choose <b>Select</b> .	The system will populate the Person on the Book Additional Participants screen.  You may add more people by selecting <b>Add Row</b> .
14. Select <b>OK</b> .	The system will display the following message:  "Participation was successfully booked."



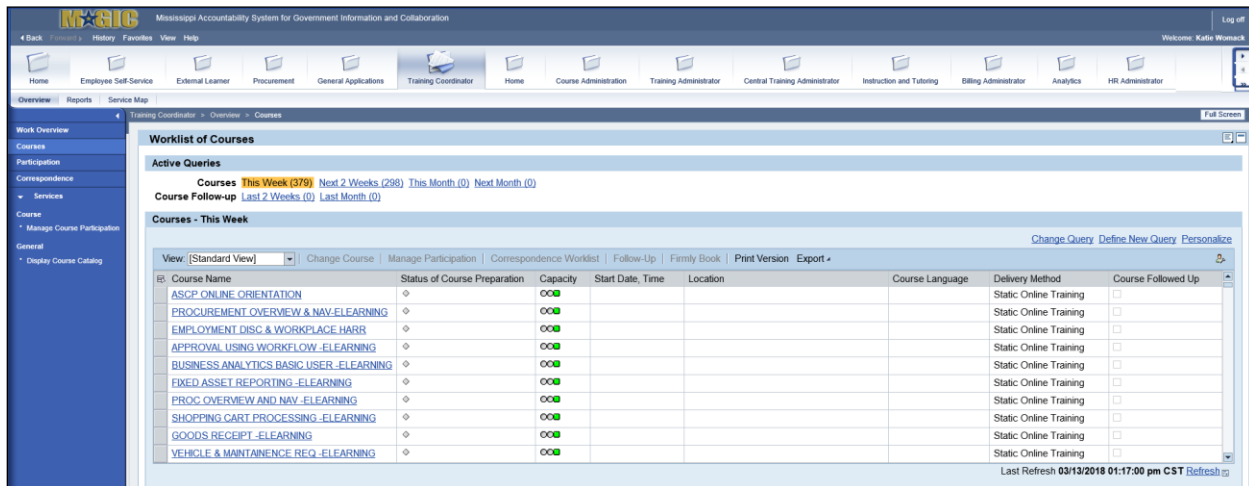
### Canceling Course Bookings

As an Agency Training Coordinator, you can also use the “Manage Course Participation” function to cancel your employees from trainings.

Your Action...	System Response...
1. Select the <b>Training Coordinator</b> Tab.	The Work Overview screen appears.



Your Action...	System Response...
2. Select <b>Courses</b> .	The Worklist of Courses screen will appear.



Your Action...	System Response...
3. Select <b>Manage Course Participation</b> .	The Manage Course Participations screen will appear.

**Manage Course Participations**

Continue

Period: 10/20/1900 - 12/07/2019 [Change Period](#)

Search in Course Catalog  
 Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
▶ Legacy Conversion			01/01/1900	
▶ SOMS Catalog			01/01/1900	
▶ Unassigned Course Types				

Your Action...	System Response...
4. Select the ▶ next to the <b>SOMS Catalog</b> .	A list of agencies providing training will appear.

**Manage Course Participations**

Continue

Period: 01/15/1900 - 03/04/2019 [Change Period](#)

Search in Course Catalog  
 Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
▶ Legacy Conversion			01/01/1900	
▼ SOMS Catalog			01/01/1900	
▶ Dept of Employment Security Catalog			01/01/1900	
▶ Finance and Administration Catalog			01/01/1900	
▶ Dept of Human Services Catalog			01/01/1900	
▶ MS Development Authority Catalog			01/01/1900	
▶ Department of Health Catalog			01/01/1900	
▶ Public Employees Retirement Sys. Catalog			01/01/1900	
▶ State Personnel Board Catalog			01/01/1900	
▶ SPB ADMINISTRATORS ONLY			01/01/1900	
▶ Information Technology Services Catalog			01/01/1900	
▶ Unassigned Course Types				

Your Action...	System Response...
5. Select the ▶ next to the agency providing the training course.	<p>A list of training Course Groups will appear.</p> <p>Browse the Course Catalog for the course, or select the radio button for “Keyword Search.” The results of your search are displayed in a window on the same screen.</p>



**Manage Course Participations**

Continue

Period: 01/15/1900 - 03/04/2019 [Change Period](#)

Search in Course Catalog  
 Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
Legacy Conversion			01/01/1900	
SOMS Catalog			01/01/1900	
Dept of Employment Security Catalog			01/01/1900	
Finance and Administration Catalog			01/01/1900	
GENE			01/01/1900	
SAAS			01/01/1900	
PROFESSIONAL DEVELOPMENT			01/01/1900	
STIMULUS 360			01/01/1900	
ACCESS CHANNEL FOR EMPLOYEES			01/01/1900	
MATA/CONTRACT AWARD			01/01/1900	
SPAHRs			01/01/1900	
SPAHRs MANAGE CONTRACTS TRAINING	Instructor-led Training		01/01/1900	
SPAHRs MANAGE CONTRACTS TRAINING		2 Places Available	09/13/2016	WOOLFOLK
SPAHRs MANAGE CONTRACTS TRAINING		Fully Booked	09/13/2016	WOOLFOLK
SPAHRs MANAGE CONTRACTS TRAINING		9 Places Available	03/21/2017	WOOLFOLK
SPAHRs MANAGE CONTRACTS TRAINING		4 Places Available	09/26/2017	Clark A
SPAHRs MANAGE CONTRACTS TRAINING		15 Places Available	02/12/2018	Clark A
SPAHRs MANAGE CONTRACTS TRAINING		15 Places Available	02/28/2018	MSU-ADV-VEH
SPAHRs HUMAN RESOURCES TRAINING	Instructor-led Training		01/01/1900	
SPAHRs PAYROLL A TO Z	Instructor-led Training		01/01/1900	

Your Action...	System Response...
6. Select the  next to the Course Group you need to cancel the employee(s) attendance.	A list of training dates will appear.
7. Select the  next to the Course and training date you need to cancel the employee(s) attendance.	The course is highlighted.
8. Select <b>Continue</b> at the top of the screen.	The Manage Course Participations screen will appear.

**Manage Course Participations**

E 60002152 Status: Family Booked Start Date/End Date: 03/21/2017 - 03/21/2017 Location: WOOLFOLK Course Owner: Delivery Method: Instructor-led Training Course Duration: 3.00 Hours on 1 Days Language: English Places Available: 9


Participants | Basic Data | Rooms and Materials | Instructors | Qualifications and Target Groups | Prices and Costs | Links | Control Parameters | Contacts | Status Overview

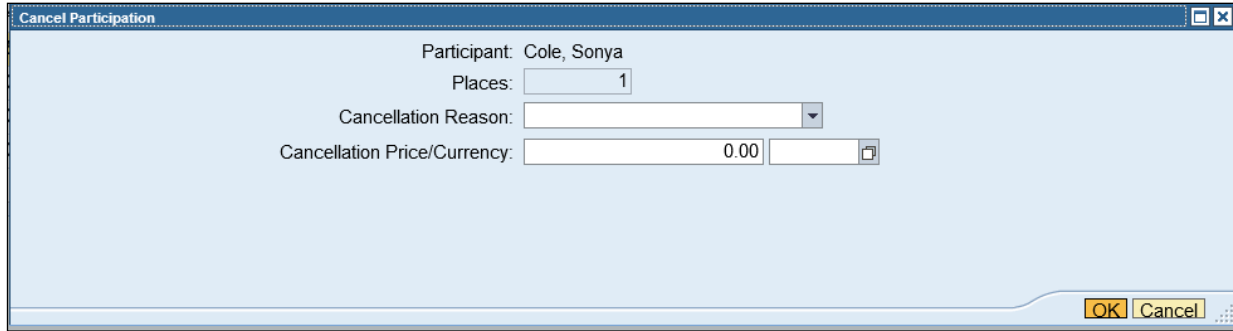
Capacity: Minimum: 1 Optimum: 15 Maximum: 15

Booked Participants (6) | **Cancelled participants (0)** | Prebookings (3) | Waitlist (0)

Change Cancellation Book Participant

Participant	Cancellation Reason	Cancellation Fee	Currency	Cancellation Date

Your Action...	System Response...
9. Select the  next to the employee's name.	The name and information are highlighted, and the employee's current training activities will populate in the bottom box.
10. Select the <b>Cancel Participation</b> .	A pop-up window will appear asking you to select a reason code for the cancellation.



Your Action...	System Response...
11. From the drop down arrow select a cancellation reason.	
12. Select <b>OK</b> .	The following message will appear:  "Participation cancelled."

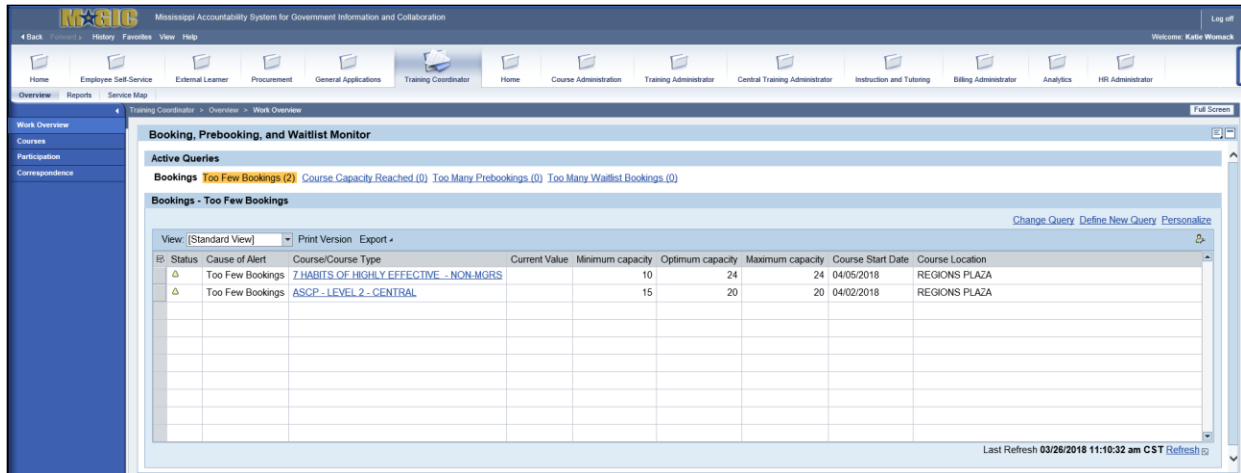
**Pre-book an Employee in Course**

Pre-booking can be used if there are not any courses scheduled or if the scheduled dates are not convenient. Pre-booking is expressing interest in attending a course at a later date.

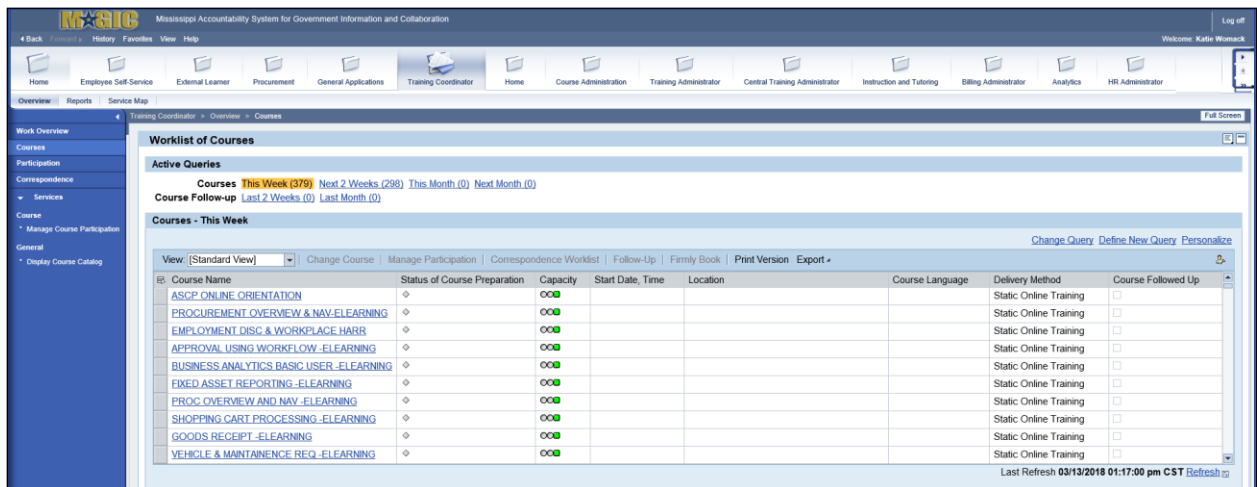
Courses that meet your employees’ pre-booking criteria will appear in their **Messages and Notes** section when they are scheduled. Employees can book themselves in those courses at that time by selecting the course title or date link for the session they wish to attend and following the standard booking procedure from the "8203 LSO Employee Self Service Guidelines" located on the MMRS website under LSO Training Materials. Only one pre-booking may exist for a given course in a specified time period. Their Pre-book lists will reflect the most recent data entered.

**NOTE:** Participants can only sign up for one occurrence of a course; they cannot choose several occurrences at the same time.

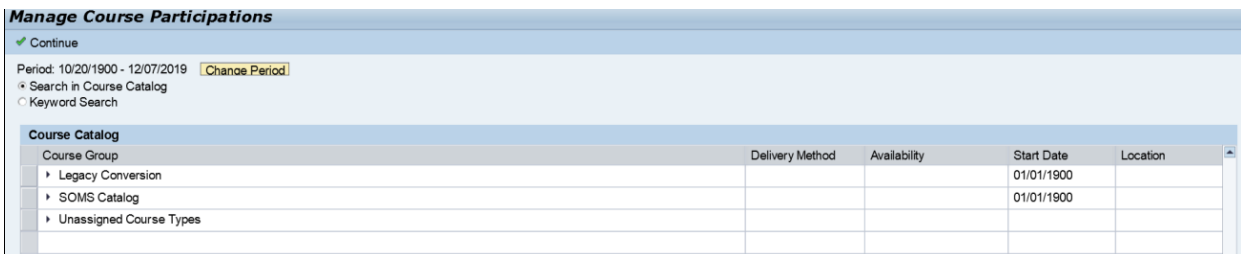
Your Action...	System Response...
1. Select the <b>Training Coordinator</b> Tab.	The Work Overview screen appears.




Your Action...	System Response...
2. Select <b>Courses</b> .	The Worklist of Courses screen will appear.



Your Action...	System Response...
3. Select <b>Manage Course Participation</b> .	The Manage Course Participations screen will appear.



Your Action...	System Response...
4. Select the  next to the <b>SOMS Catalog</b> .	A list of agencies providing training will appear.

**Manage Course Participations**

Continue

Period: 01/15/1900 - 03/04/2019 [Change Period](#)

Search in Course Catalog  
 Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
Legacy Conversion			01/01/1900	
SOMS Catalog			01/01/1900	
Dept of Employment Security Catalog			01/01/1900	
Finance and Administration Catalog			01/01/1900	
Dept of Human Services Catalog			01/01/1900	
MS Development Authority Catalog			01/01/1900	
Department of Health Catalog			01/01/1900	
Public Employees Retirement Sys. Catalog			01/01/1900	
State Personnel Board Catalog			01/01/1900	
SPB ADMINISTRATORS ONLY			01/01/1900	
Information Technology Services Catalog			01/01/1900	
Unassigned Course Types				

Your Action...	System Response...
5. Select the ▶ next to the agency providing the training course.	A list of training Course Groups will appear. Browse the Course Catalog for the course, or select the radio button for “Keyword Search.” The results of your search are displayed in a window on the same screen.



**Manage Course Participations**

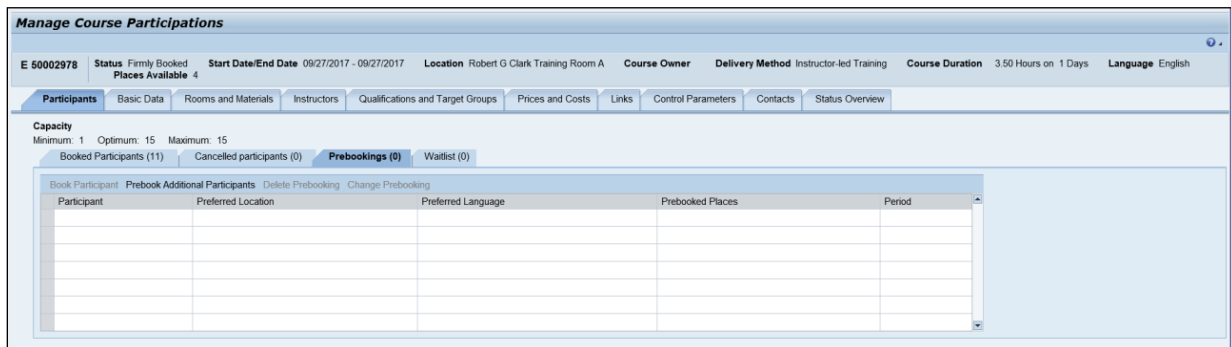
Continue


Period: 01/15/1900 - 03/04/2019 [Change Period](#)

Search in Course Catalog  
 Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
Legacy Conversion			01/01/1900	
SOMS Catalog			01/01/1900	
Dept of Employment Security Catalog			01/01/1900	
Finance and Administration Catalog			01/01/1900	
GENE			01/01/1900	
SAAS			01/01/1900	
PROFESSIONAL DEVELOPMENT			01/01/1900	
STIMULUS 360			01/01/1900	
ACCESS CHANNEL FOR EMPLOYEES			01/01/1900	
MATA/CONTRACT AWARD			01/01/1900	
SPAHRS			01/01/1900	
SPAHRS MANAGE CONTRACTS TRAINING	Instructor-led Training		01/01/1900	
SPAHRS MANAGE CONTRACTS TRAINING		2 Places Available	09/13/2016	WOOLFOLK
SPAHRS MANAGE CONTRACTS TRAINING		Fully Booked	09/13/2016	WOOLFOLK
SPAHRS MANAGE CONTRACTS TRAINING		9 Places Available	03/21/2017	WOOLFOLK
SPAHRS MANAGE CONTRACTS TRAINING		4 Places Available	09/26/2017	Clark A
SPAHRS MANAGE CONTRACTS TRAINING		15 Places Available	02/12/2018	Clark A
SPAHRS MANAGE CONTRACTS TRAINING		15 Places Available	02/28/2018	MSU-ADV-VEH
SPAHRS HUMAN RESOURCES TRAINING	Instructor-led Training		01/01/1900	
SPAHRS PAYROLL A TO Z	Instructor-led Training		01/01/1900	

Your Action...	System Response...
6. Select the  next to the Course Group you would like your employees to attend.	A list of training dates will appear.
7. Select the  next to the Course and training date you would like your employee(s) to attend.	The course is highlighted.
8. Select <b>Continue</b> at the top of the screen.	The Manage Course Participations screen will appear.



Your Action...	System Response...
9. Select <b>the Prebookings Tab.</b>	
10. Select <b>Prebook Additional Participants.</b>	The Prebook Additional Participants screen will appear.
11. Once you click on the on the first row by Participant, select the 	The Select Participant screen will appear.

The screenshot shows a software window titled "Select Participants". It contains the following elements:

- Participant** section: A "Search Term:" text input field.
- Select Participant Type** section: A dropdown menu currently showing "Person".
- Find** button: A yellow button to execute the search.
- List** section: A table with three columns: "Participant", "Participant Type", and "Organization". The table is currently empty.
- Select** button: A yellow button at the bottom left.
- Close** button: A yellow button at the bottom right.

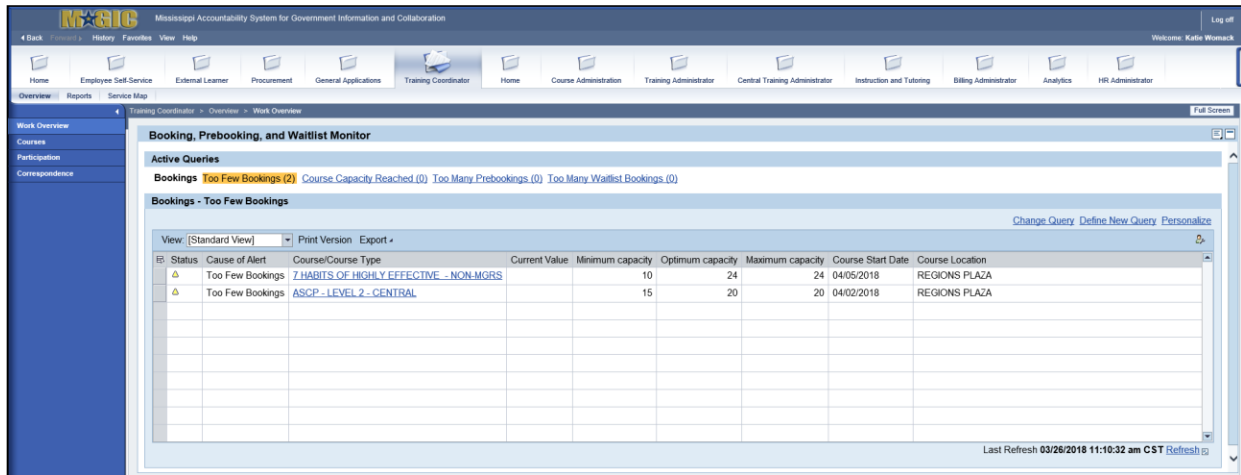
Your Action...	System Response...
12. Enter the Last Name of the employee in the search term box.	
13. <b>Select Participant Type</b> as person and select <b>Find</b> .	The person will be displayed.
14. Highlight the person to be added to the course and choose <b>Select</b> .	The system will populate the Person on the Book Additional Participants screen.  You may add more people by selecting <b>Add Row</b> .
15. Select <b>OK</b> .	The system will display the following message:  "Participation prebooking was successfully."



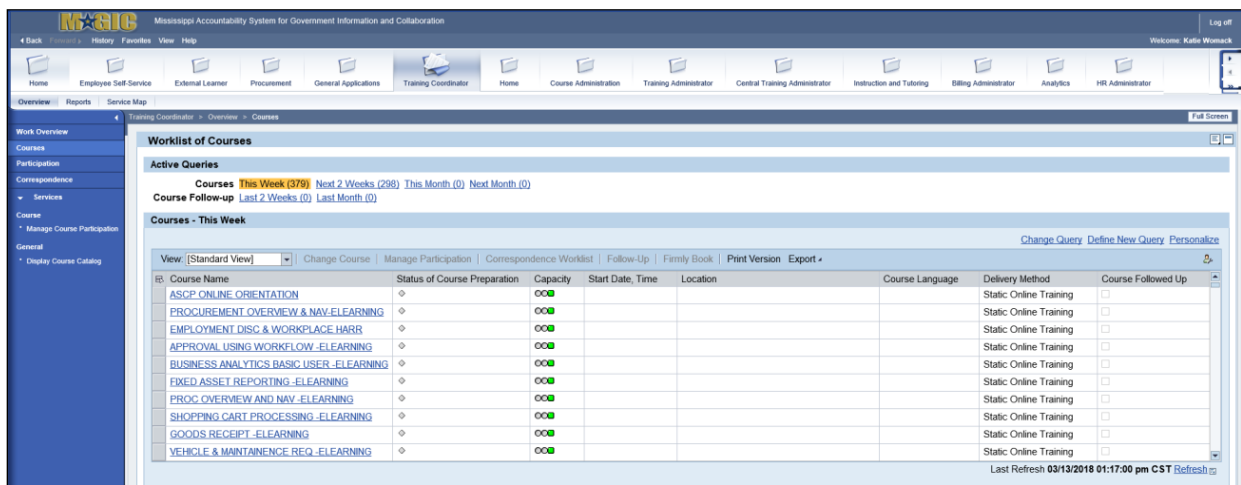
### Change Prebooking

As Agency Training Coordinator, you can also use the “Manage Course Participation” function to change or cancel your employees from their prebookings or modify their existing prebookings with a new date or location.

Your Action...	System Response...
1. Select the <b>Training Coordinator</b> Tab.	The Work Overview screen appears.



Your Action...	System Response...
2. Select <b>Courses</b> .	The Worklist of Courses screen will appear.



Your Action...	System Response...
3. Select <b>Manage Course Participation</b> .	The Manage Course Participations screen will appear.

**Manage Course Participations**

Continue

Period: 10/20/1900 - 12/07/2019 Change Period

Search in Course Catalog  
 Keyword Search

**Course Catalog**

Course Group	Delivery Method	Availability	Start Date	Location
▶ Legacy Conversion			01/01/1900	
▶ SOMS Catalog			01/01/1900	
▶ Unassigned Course Types				

Your Action...	System Response...
4. Select the ▶ next to the <b>SOMS Catalog</b> .	A list of agencies providing training will appear.

**Manage Course Participations**

Continue

Period: 01/15/1900 - 03/04/2019 Change Period

Search in Course Catalog  
 Keyword Search

**Course Catalog**

Course Group	Delivery Method	Availability	Start Date	Location
▶ Legacy Conversion			01/01/1900	
▼ SOMS Catalog			01/01/1900	
▶ Dept of Employment Security Catalog			01/01/1900	
▶ Finance and Administration Catalog			01/01/1900	
▶ Dept of Human Services Catalog			01/01/1900	
▶ MS Development Authority Catalog			01/01/1900	
▶ Department of Health Catalog			01/01/1900	
▶ Public Employees Retirement Sys. Catalog			01/01/1900	
▶ State Personnel Board Catalog			01/01/1900	
▶ SPB ADMINISTRATORS ONLY			01/01/1900	
▶ Information Technology Services Catalog			01/01/1900	
▶ Unassigned Course Types				

Your Action...	System Response...
5. Select the ▶ next to the agency providing the training course.	A list of training Course Groups will appear.  Browse the Course Catalog for the course, or select the radio button for “Keyword Search.” The results of your search are displayed in a window on the same screen.



Your Action...	System Response...
11. Select <b>Change Prebooking</b> .	The Change Prebooking window will appear which gives you the option of changing the Preferred Location, Preferred Start and End Date.

Change Prebooking

Participant: Bishop, Chester

Preferred Location:


Preferred Language: English

\* Prebooked Places: 1

\* Preferred Start Date: 03/13/2018

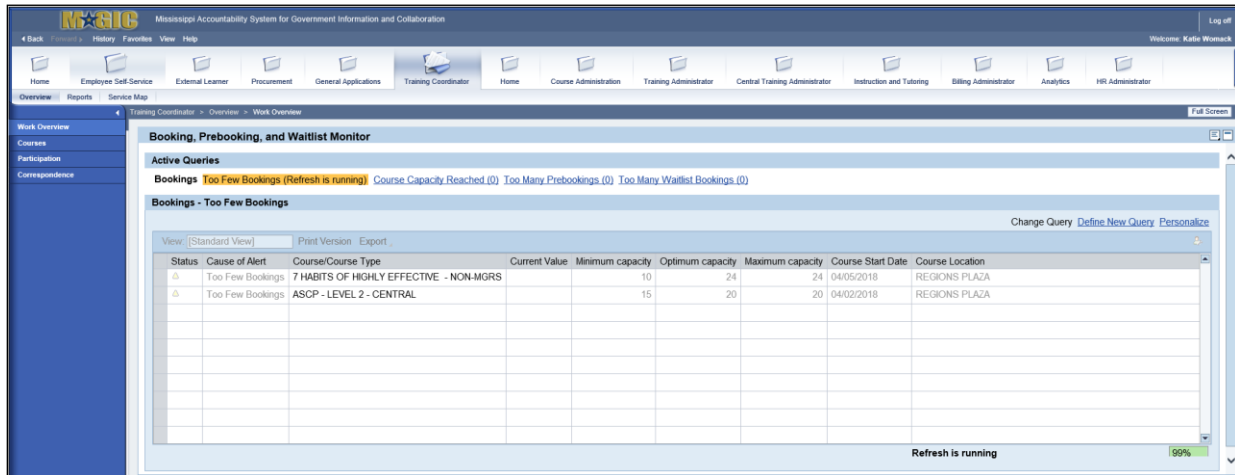
\* Preferred End Date: 12/31/9999

OK Cancel

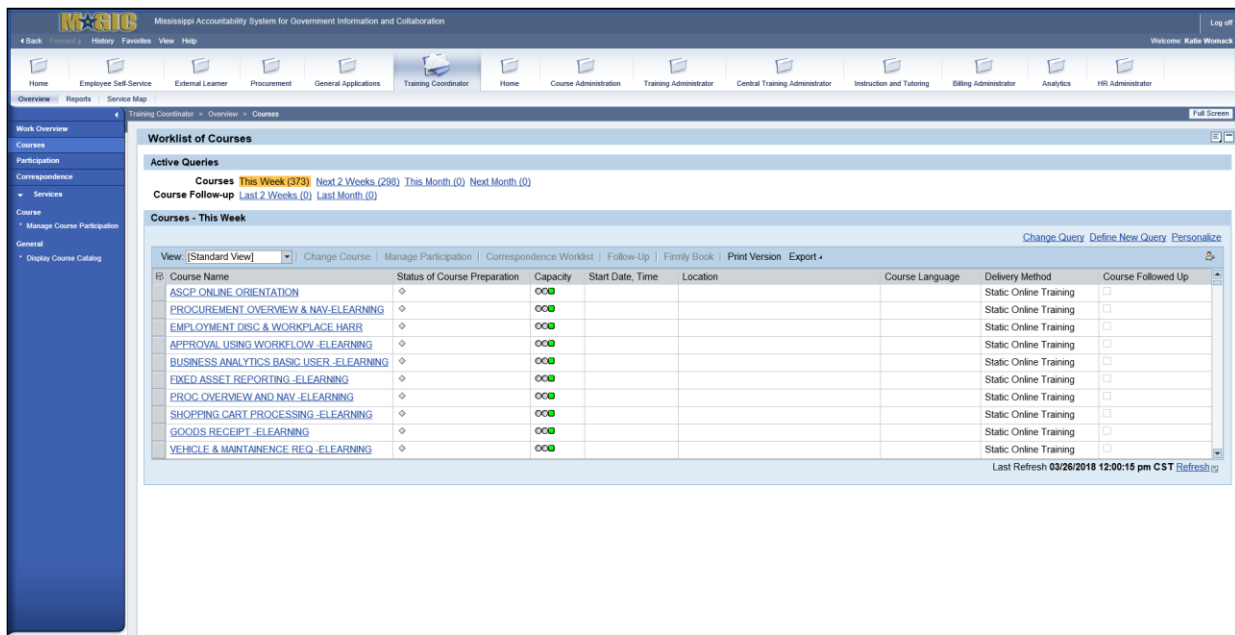
Your Action...	System Response...
1. Select  by the <b>Preferred Location</b> in order to select the location for the employee to attend. This is not a required field.	
2. Select the <b>Preferred Start Date</b> , and <b>Preferred End Date</b> to select the location and dates you would prefer for the employee.	
3. Select <b>OK</b> .	System will display the following message at the top of the page.  The prebooking data has been changed.
4. <b>Close</b> the window.	

### Cancel Prebooking

Your Action...	System Response...
1. Select the <b>Training Coordinator</b> tab.	The Work Overview screen appears.



Your Action...	System Response...
2. Select <b>Courses</b> tab	



Your Action...	System Response...
3. Select <b>Manage Course Participation</b> tab.	Manage Course Participation screen will appear.

**Manage Course Participations**


Continue

Period: 10/20/1900 - 12/07/2019 [Change Period](#)

Search in Course Catalog  
 Keyword Search

**Course Catalog**

Course Group	Delivery Method	Availability	Start Date	Location
▶ Legacy Conversion			01/01/1900	
▶ SOMS Catalog			01/01/1900	
▶ Unassigned Course Types				

Your Action...	System Response...
4. Select  next to the <b>SOMS Catalog</b> .	A list of agencies providing training will appear.

**Manage Course Participations**


Continue

Period: 01/15/1900 - 03/04/2019 [Change Period](#)

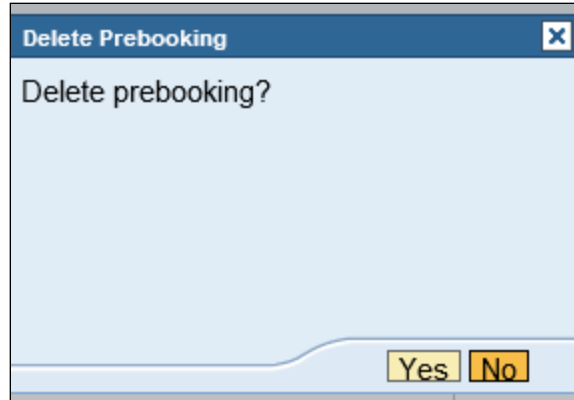
Search in Course Catalog  
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**Course Catalog**

Course Group	Delivery Method	Availability	Start Date	Location
▶ Legacy Conversion			01/01/1900	
▼ SOMS Catalog			01/01/1900	
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▶ Finance and Administration Catalog			01/01/1900	
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▶ MS Development Authority Catalog			01/01/1900	
▶ Department of Health Catalog			01/01/1900	
▶ Public Employees Retirement Sys. Catalog			01/01/1900	
▶ State Personnel Board Catalog			01/01/1900	
▶ SPB ADMINISTRATORS ONLY			01/01/1900	
▶ Information Technology Services Catalog			01/01/1900	
▶ Unassigned Course Types				

Your Action...	System Response...
5. Select the  next to the agency providing the training course.	<p>A list of training Course Groups will appear.</p> <p>Browse the Course Catalog for the course, or select the radio button for “Keyword Search.” The results of your search are displayed in a window on the same screen.</p>





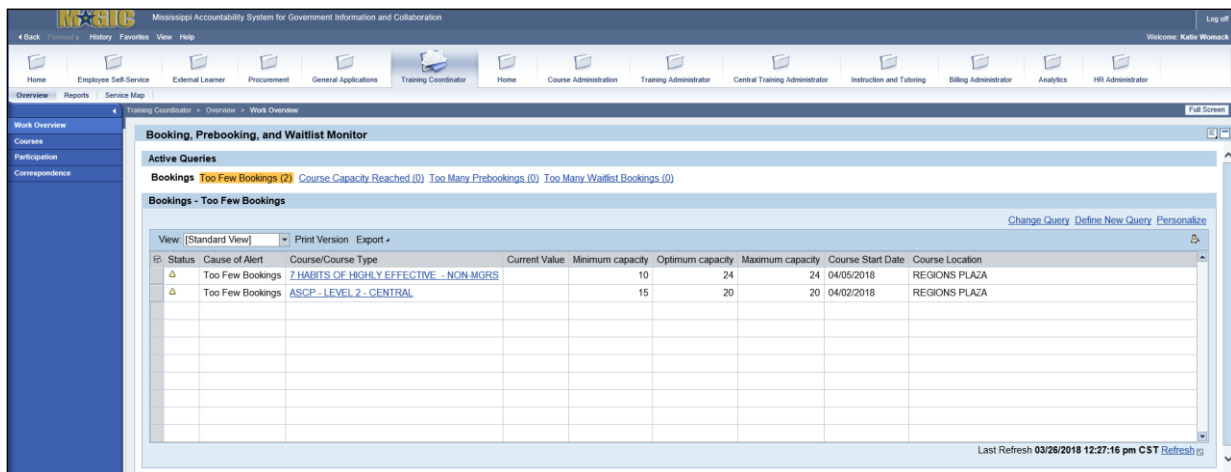
Your Action...	System Response...
12. Select <b>Yes</b> .	System will display the following message at the top of the page.  The prebooking has been deleted.
13. <b>Close</b> the window.	

### Manage Mandatory Assignments

A Mandatory Course Assignment does not book your employees into a course; it merely places the course in their Messages and Notes section telling them to book the first available session of the training.

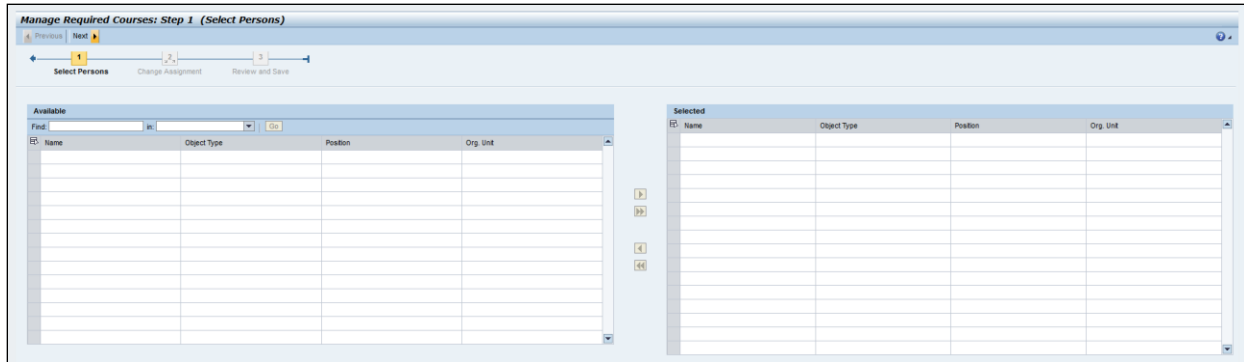
Mandatory Course Assignments are a way to tell your employees they need to book a course or there is training that is strongly recommended for them to attend.


Your Action...	System Response...
1. Select the <b>Training Coordinator</b> tab.	

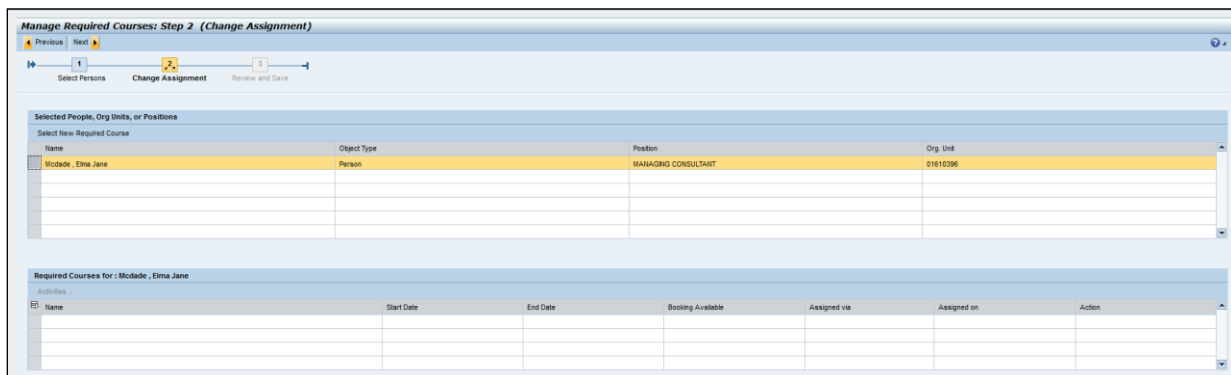




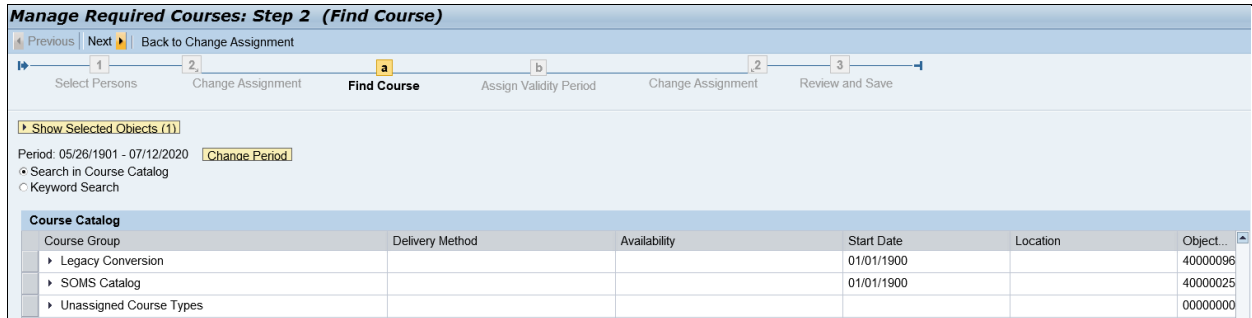
Your Action...	System Response...
2. Select the <b>Participation</b> tab.	
3. Select the <b>Manage Mandatory Assignment</b> tab.	The Manage Required Course screen will appear.



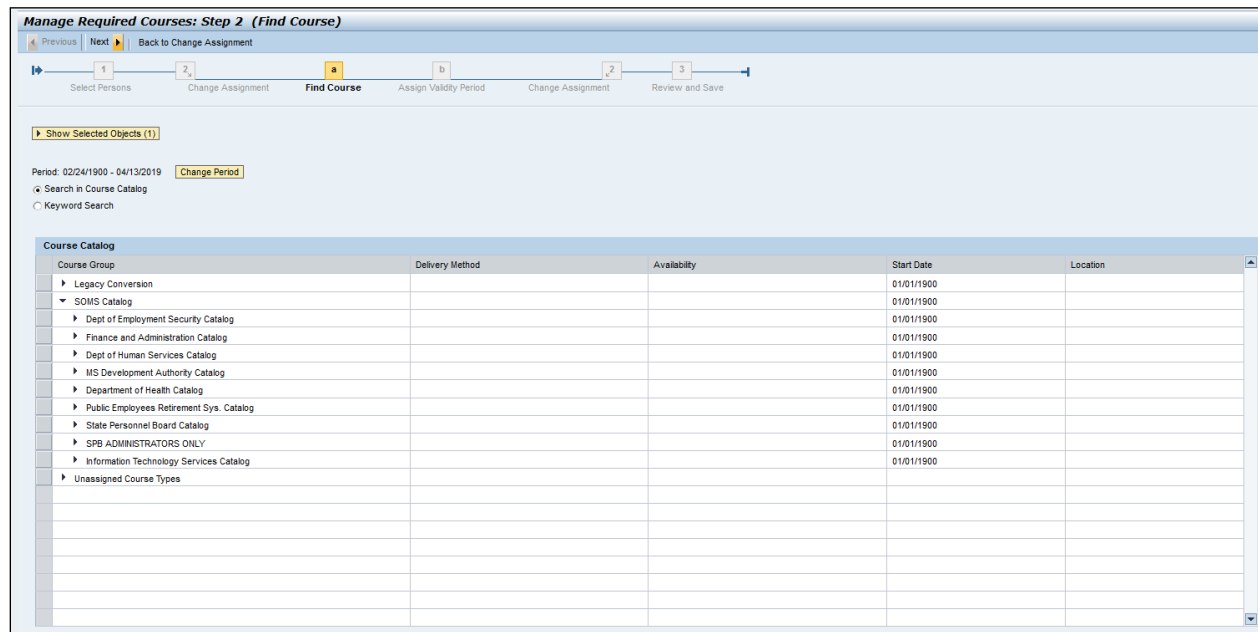
Your Action...	System Response...
4. Type your employee’s last name in the <b>Find</b> box to search for the employee(s) you would like to manage a required training course.	
5. Select Organizational Unit, Job, Position or Person from the drop down menu under the <b>IN</b> space.  If you’d like to manage required training for all of your direct reports, just place the first 4 digits of your org unit number and an asterisk (*) in the “Find” field and select “Organizational Unit” from the drop-down menu.	
6. Select <b>GO</b> .	The requested information will be returned.
7. Highlight the employee from the Available box and select  to insert employee into the <b>Selected</b> box.	
8. Select <b>Next</b> .	The Manage Required Courses screen will appear.



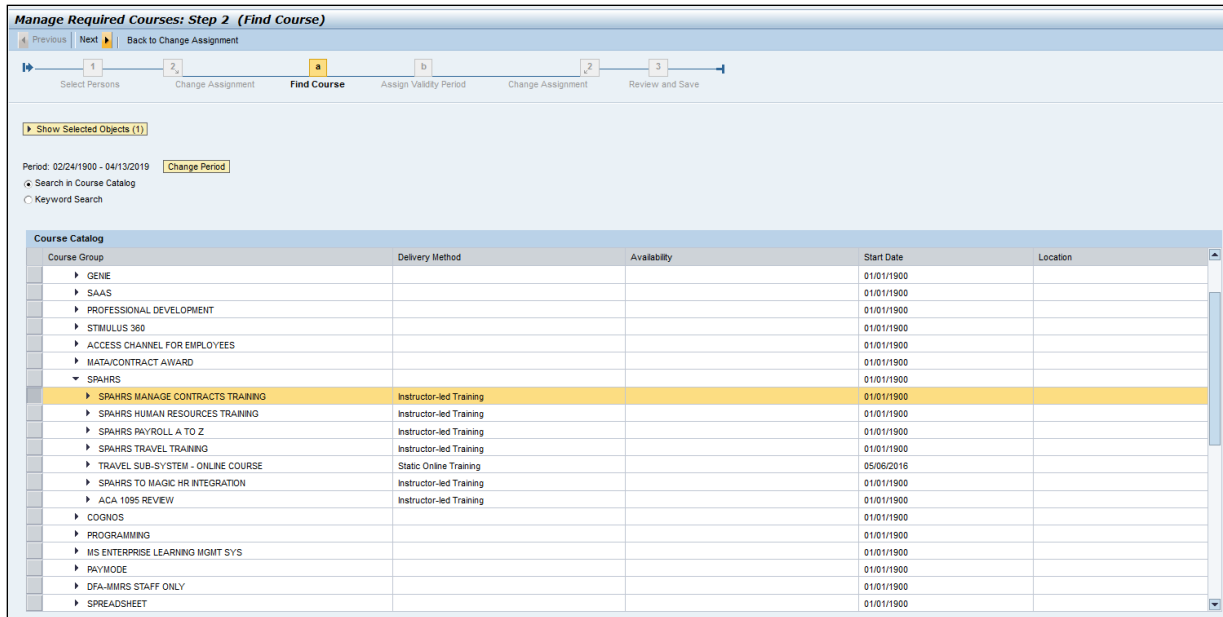
Your Action...	System Response...
9. Select the box next to the employee's name.	The name and information are highlighted.
10. Select the <b>Select New Required Course</b> button.	The Course Catalog screen will appear.





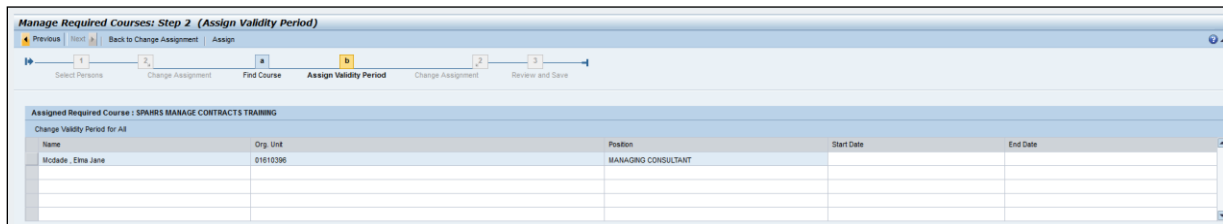
Your Action...	System Response...
11. Select the <input type="radio"/> next to the <b>SOMS Catalog</b> .	A list of agencies providing training will appear.



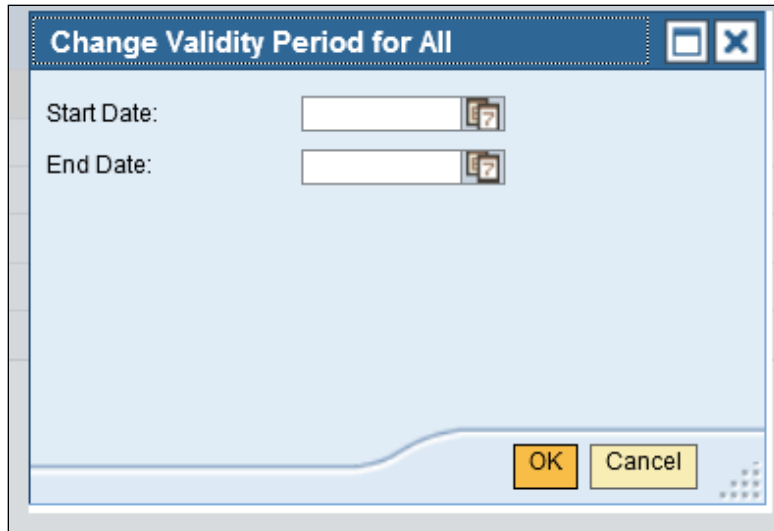
Your Action...	System Response...
12. Select the <input type="radio"/> next to the agency providing the training course.	A list of training Course Groups will appear.  Browse the Course Catalog for the course, or select the radio button for "Keyword Search." The results of your search are displayed in a window on the same screen.



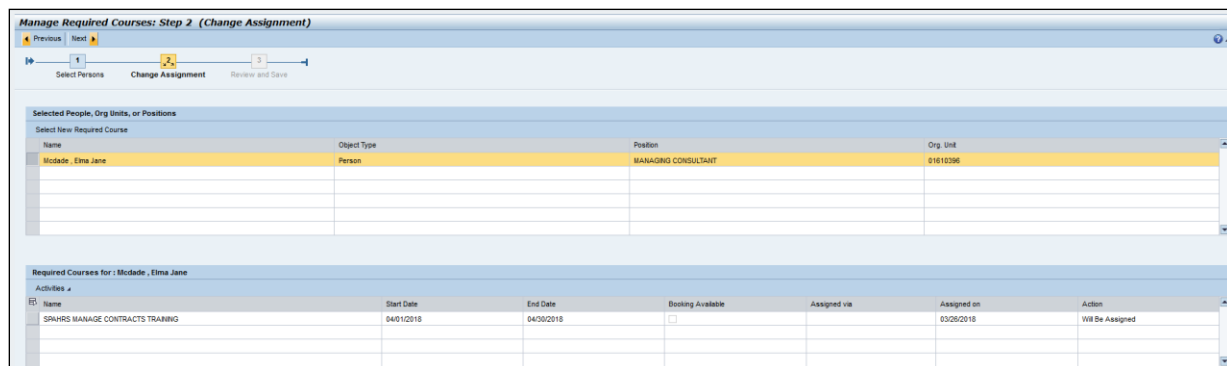
Your Action...	System Response...
13. Select the  next to the Course Group you would like your employees to attend.	A list of training dates will appear.
14. Select the  next to the name of the training <b>Course Type</b> to be assigned.	The course is highlighted.
15. Select <b>Next</b> .	The assignment screen will appear.



Your Action...	System Response...
16. Select the <b>Change Validity Period for All</b> button.	The Change Validity Period for All window will appear.



Your Action...	System Response...
17. Select the <b>Start and End Date</b> .	
18. Select <b>OK</b> .	
19. Select <b>Assign</b> .	A summary screen will appear.

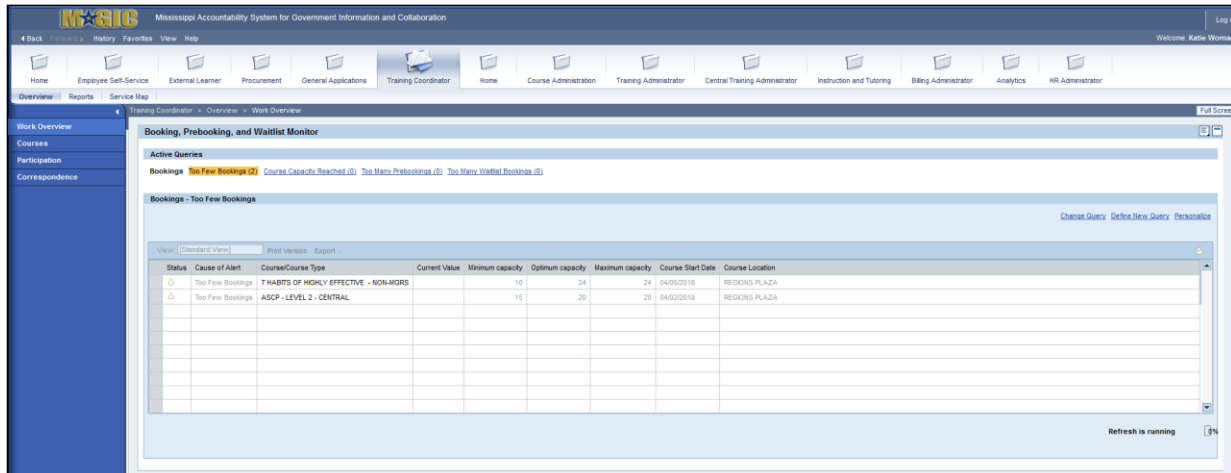


Your Action...	System Response...
20. Select <b>Next</b> .	
21. Select <b>Next</b> .	The activity was completed successfully message will appear at the top of the page.
22. Close the window.	

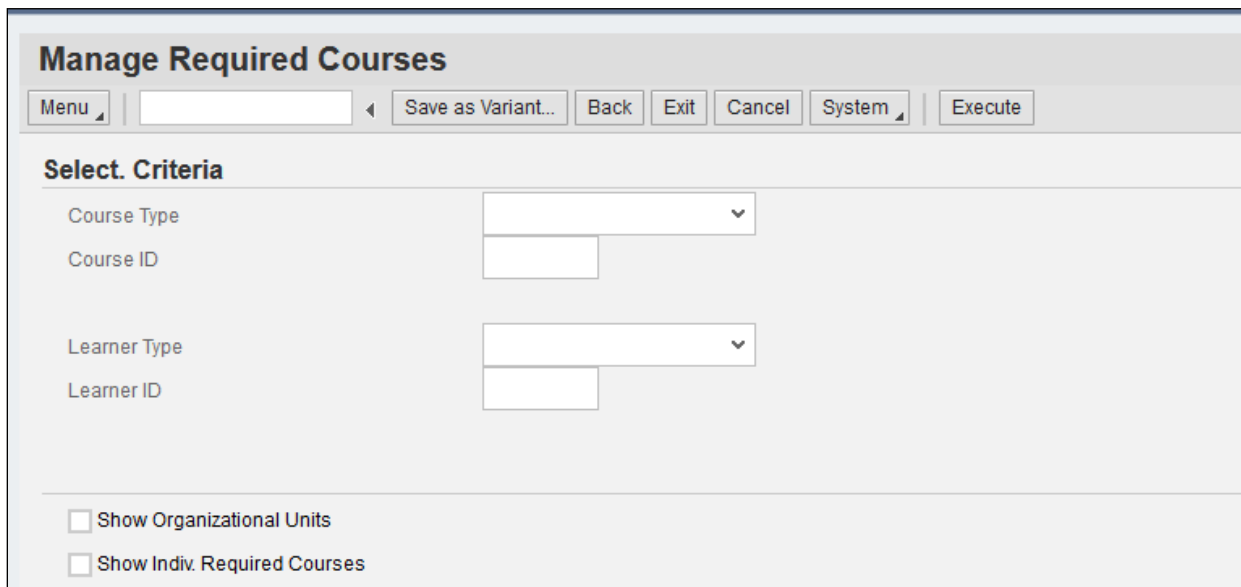
### Mandatory Assignments Report


As well as making mandatory course assignments to your employees, you can also run a brief report to check on their progress.

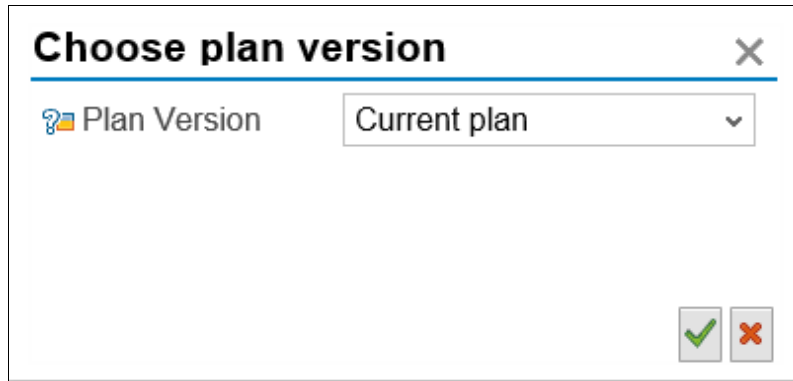
Your Action...	System Response...
1. Select the <b>Training Coordinator</b> tab.	





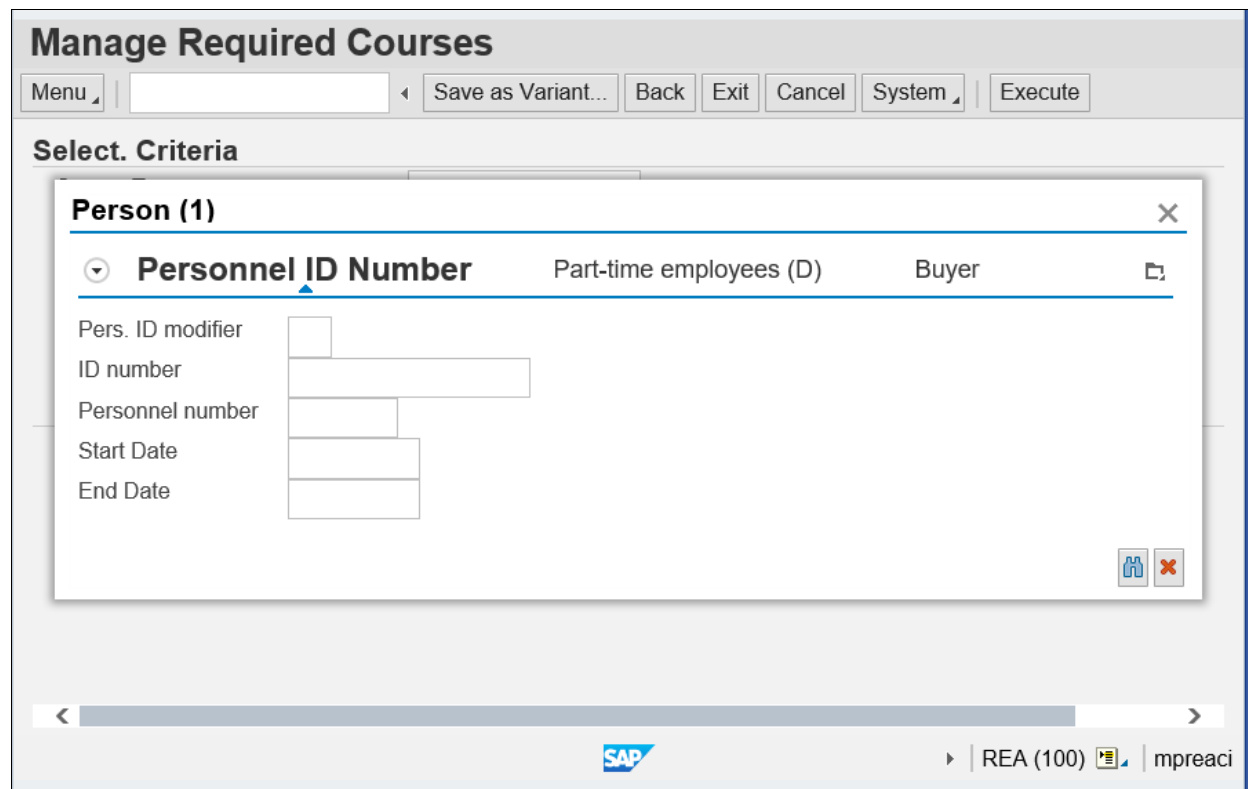
Your Action...	System Response...
2. Select the <b>Participation</b> tab.	
3. Select the <b>Mandatory Assignment Report</b> link.	The Manage Required Course screen will appear.





Your Action...	System Response...
4. Select <b>P Person</b> from <b>Learner Type</b> drop down box.	
5. Click on the <b>Learner ID</b> box and select the  .	Choose Plan Version search screen will appear.



Your Action...	System Response...
6. Select <b>Current plan</b> for the Plan Version and select  .	The Person screen will appear. <b>NOTE:</b> If the Search Term screen appears, select  and choose Personnel ID Number.



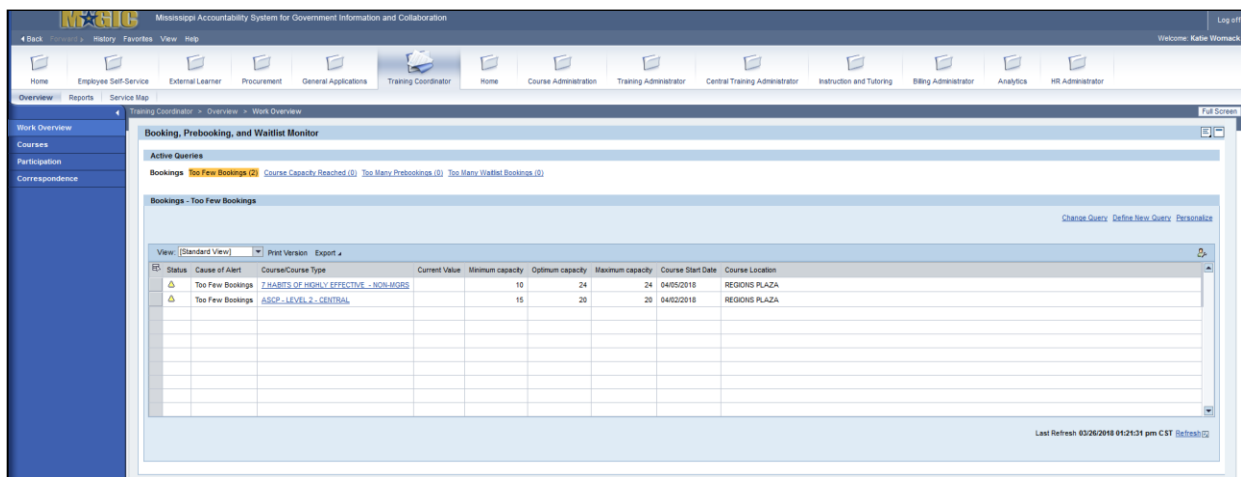
Your Action...	System Response...
7. Enter the employee's <b>Personnel number</b> .	
8. Select the  .	The search results will appear.
9. Select the employee.	The row is highlighted.
10. Select the  to confirm your selection.	

Your Action...	System Response...
11. Select <b>Execute</b> .	The resulting report will show you the employee’s mandatory assignments and whether they have booked or completed them.

### Employee Training Transcript

As the Agency Training Coordinator, you can run your employee’s training transcript at any time.



Your Action...	System Response...
1. Select the <b>Training Coordinator</b> tab.	The Work Overview screen appears.



Your Action...	System Response...
2. Select the <b>Reports</b> tab.	A listing of reports will appear.

Your Action...	System Response...
3. Select the <b>Course Transcript Report</b> tab.	The Prompts screen will appear.



Your Action...	System Response...
4. Select the <b>Participant Last Name</b> and enter the employee's last name <i>in all capital letters</i> .	
5. Select  to search for the employee.	The employee's last name appears in the left hand box.
6. Highlight the last name and press  to move the name to the box on the right.	
7. Select <b>OK</b> .	The transcript appears for all people with the same last name.  <b>NOTE:</b> There is a filter at the top of the screen where you can drill down to locate first name of an employee.