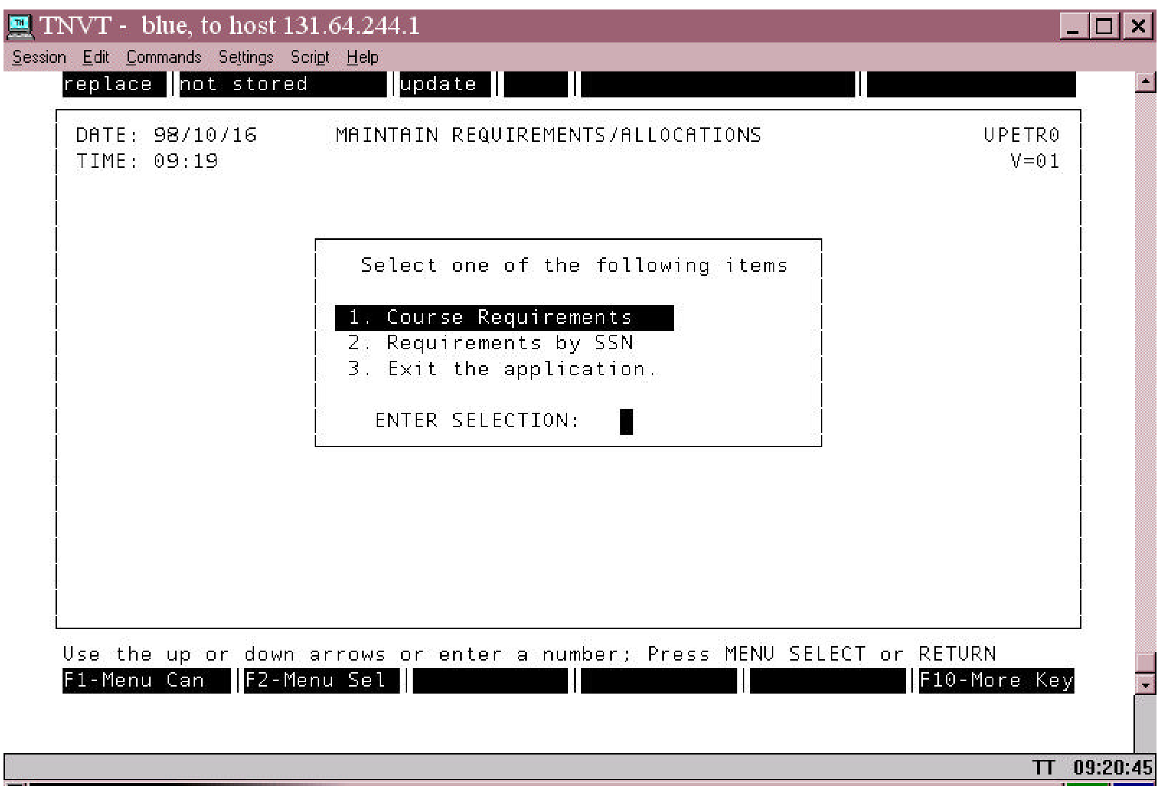
TRAINING REQUIREMENTS

A Requirement is basically a request for training. Training Office personnel can request training for employees using this process. Their request for training does not assign the employee to a class, this must be done through the MAINTAIN CLASS ROSTER process. This process only verifies that the employee is required to take training. Requirement records are identified in the system with a Training Status code of "R" (Requirement).

An Allocation is a requirement with a guaranteed space in a class. In other words, once an employee is assigned to a class by the Training Office, he/she is considered allocated for the training and are identified with a Training Status Code of "A" (Allocation).

This process allows the user to add, change and delete allocated/unallocated requirements for Standard and Local courses. These functions can be done by COURSE or by SSN.

The Training Office can add, change and delete unallocated and allocated training requirements (Training Status "R" and "A") through this process by selecting Option 5 - REQUIREMENTS/ ALLOCATIONS from the TRAINING OFFICE MENU.

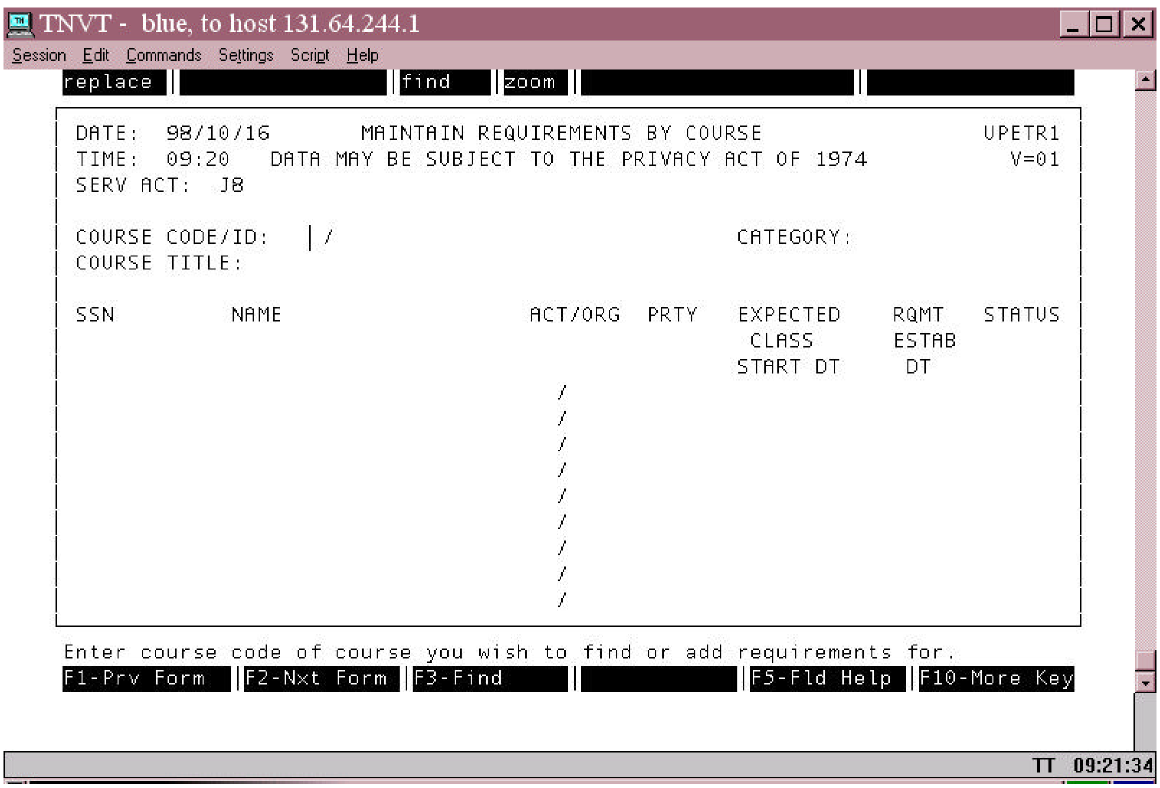


An option can be selected from this sub-menu by one of the following two methods:

a. Place the cursor on the option by using the positional arrow keys or depress the ENTER/RETURN key.

b. Enter an option number in the ENTER SELECTION field and depress the ENTER/RETURN key.

COURSE REQUIREMENTS



ZOOM FUNCTIONS AVAILABLE:

a. From the COURSE CODE/ID field to the INQUIRE COURSE DATA screen.

b. From the SSN field to the EMPLOYEE INQUIRY screen.

c. From the EXPECTED CLASS START DATE field to the INQUIRE CLASS ROSTER screen.

ADDING REQUIREMENTS BY COURSE

a. When first accessed, the screen will be in the find mode.

b. Input the Course Code/ID and/or other search criteria as desired. You can also ZOOM/(F20) from the Course Code field to the Course Data screen. Find the course and press PREVIOUS FORM/(F1) to take course data back.

c. Depress the FIND/(F3) function key.

(1) If there are no requirements/allocations established for the Course Code/ID input, the message NO RECORDS FOUND will appear at the top right corner of the screen. The cursor will be resting on the SSN field to add a record and the screen will be in the update mode.

(2) If there are requirements/allocations established for the Course Code/ID input, the message RECORDS FOUND will appear at the top right corner of the screen. The cursor will be resting on the PRTY field of the first record and the screen will be in the update mode. Depress the CLR-ADD/(F7) function key.

d. Input the SSN and/or other desired data, or ZOOM/(F20) from the SSN field to the Employee Inquiry screen and PREVIOUS FORM/(F1) the date back.

e. Depress the ADD/UPD/(F9) function key. If the record was successfully added, the message ADDED will appear at the top right corner of the screen.

NOTE: The Priority, Exp. Class St. Date, Requirement Established Date and status fields can be changed either before or after the record has been added. See nest section on Changing Req. for more information.

f. To add another SSN for the input Course Code/ID, depress the CLR-ADD/(F7) function key, return to step d. above.

g. To add records for another Course Code/ID, depress the CLR-FIND/(F13) function key, return to step b. above.

h. To return to the TRAINING OFFICE MENU, depress the PRV FORM/(F1) function key twice.

NOTE: Only the Training Office can add Allocation records. To add an allocation, place the cursor on the STATUS field of the Requirement record, change the "R" to an "A" and depress the ADD/UPD function key. You must enter the class start date in the EXPECTED CLASS START DATE field before filing an allocation.

CHANGING REQUIREMENTS BY COURSE

a. If the screen is not in the find mode, depress the CLR- FIND/(F13) function key.

b. Input the Course Code/ID and/or other search criteria as desired, or ZOOM/(F20) to the Course Data screen and bring the course back using the PREVIOUSFORM/(F1) function key.

c. Depress the FIND/(F3) function key. If there are requirements/allocations established for the input Course Code/ID the data will be displayed in the update mode. At this point you may change the records.

d. Place the cursor on the record to be changed using the NXT REC/(F4) and PRV REC/(F3) function keys or the positional arrow keys.

e. Make desired changes to PRTY, EXPECTED CLASS START DT, REQMT ESTAB DT and/or STATUS. If a Status of ‘A’(allocation) is input the Exp. Class Start. Date. Field must be filled in. If a status of R’(required) is used the Exp. Class Start. Date. Can be used but is not mandatory.

NOTE: You may also update other fields by depressing the NXT FORM/(F2) function key to access the detailed requirement or allocation record. Position the cursor in the desired field, update the field, press the ADD/UPD/(F9) function key followed by PRV FORM/(F1) to update the record and return to the previous screen. Reference the section on using Employee Requirements/Allocations detailed screen (UPETR3). If an allocation ‘A’status is set up through the class roster process, the record cannot be changed through the Requirements/Allocations process. If a Requirements Established Date needs to be updated for a course that has a Training Due Date record (Completion Timeframe on Course Data) the system will not allow more time to be added to the Training Due Date.

f. Depress the ADD/UPD/(F9) function key. If the record was successfully updated, the message UPDATED will appear at the top right corner of the screen.

g. To make additional changes to records for the input Course Code/ID, return to step d. above.

h. To make changes to another Course Code/ID, return to step a. above.

i. To return to the TRAINING OFFICE MENU, depress the PRV FORM/(F1) function key twice.

DELETING REQUIREMENTS BY COURSE

a. If the screen is not in the find mode, depress the CLR- FIND/(F13) function key.

b. Input the Course Code/ID and/or other search criteria as desired, or ZOOM/(F20) to the Course Data screen and bring the course back using the PREVIOUSFORM/(F1) function key.

c. Depress the FIND/(F3) function key. If there are requirements/allocations established for the input Course Code/ID the data will be displayed in the update mode. At this point you may delete the record.

d. Place the cursor on the record to be deleted using the NXT REC/(F4) and PRV REC/(F3) function keys or the positional arrow keys.

e. Depress the DEL REC/(F18) function key. The message ENTER YES TO CONFIRM DELETE will appear at the bottom of the screen.

f. Confirm the delete by entering YES and depress the ENTER/RETURN key. If the delete was successful, the message DELETED will appear at the top right corner of the screen.

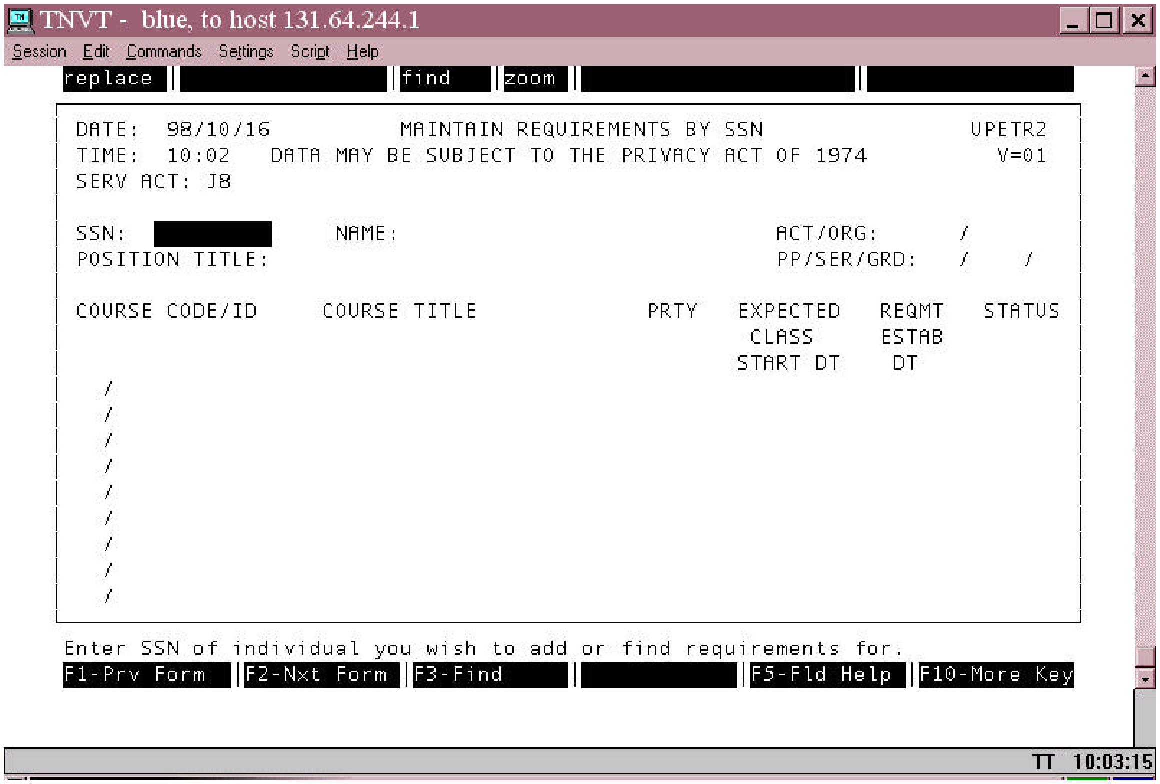
g. If you enter anything other than YES and depress the ENTER/RETURN key, the delete will not take place.

h. To delete additional requirements/allocations for the input Course Code/ID, return to step d. above.

i. To delete requirements/allocations for another Course Code/ID, return to step a. above.

j. To return to the TRAINING OFFICE MENU, depress the PRV FORM/(F1) function key twice.

REQUIREMENTS BY SSN


TNVT - blue, to host 131.64.244.1
Session Edit Commands Settings Script Help
replace find zoom

DATE: 98/10/16 MAINTAIN REQUIREMENTS BY SSN UPETR2
TIME: 10:02 DATA MAY BE SUBJECT TO THE PRIVACY ACT OF 1974 V=01
SERV ACT: J8

SSN: NAME: ACT/ORG: /
POSITION TITLE: PP/SER/GRD: / /

COURSE CODE/ID COURSE TITLE PRTY EXPECTED CLASS START DT REQMT ESTAB DT STATUS

/
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/

Enter SSN of individual you wish to add or find requirements for.
F1-Prv Form F2-Nxt Form F3-Find F5-Fld Help F10-More Key
TT 10:03:15

ZOOM FUNCTIONS AVAILABLE:

a. From the SSN field to the EMPLOYEE INQUIRY screen.

b. From the COURSE CODE/ID field to the INQUIRE COURSE DATA screen.

c. From the EXPECTED CLASS START DATE field to the INQUIRE CLASS ROSTER screen.

ADDING REQUIREMENTS BY SSN

a. When first accessed the screen will be in the find mode.

b. Input the SSN and/or other search criteria as desired, or ZOOM/(F20) to the Employee Inquiry Screen and bring back data using PREVIOUS FORM/(F1).

c. Depress the FIND/(F3) function key.

(1) If there are no requirements/allocations established for the SSN input, the message NO RECORDS FOUND will appear at the top right corner of the screen. The cursor will be resting on the COURSE CODE/ID field to add a record and the screen will be in the update mode.

(2) If there are requirements/allocations established for the SSN input, the message RECORDS FOUND will appear at the top right corner of the screen. The cursor will be resting on the PRTY field of the first record and the screen will be in the update mode. Depress the CLR-ADD/(F7) function key.

d. Input the Course Code/ID and other desired data.

e. Depress the ADD/UPD/(F9) function key. If the record was successfully added, the message ADDED will appear at the top right corner of the screen.

NOTE: The Priority, Exp. Class St. Date, Requirement Established Date and status fields can be changed either before or after the record has been added. See nest section on Changing Req. for more information.

f. To add another record for the input SSN, depress the CLR-ADD/(F7) function key, return to step d. above.

g. To add a record for another SSN, depress the CLR-FIND/(F13) function key, return to step b. above.

h. To return to the TRAINING OFFICE MENU, depress the PRV FORM/(F1) function key twice.

NOTE: Only the Training Office can add Allocation records. To add an allocation, place the cursor on the STATUS field of a Requirement record, change the "R" to an "A" and input the expected class start date. Press the ADD/UPD/(F9) function key to add the record.

CHANGING REQUIREMENTS BY SSN

a. If the screen is not in the find mode, depress the CLR-FIND/(F13) function key.

b. Input the SSN and/or other search criteria as desired, or ZOOM/(F20) to the Employee Inquiry Screen and bring back data using PREVIOUS FORM/(F1).

c. Depress the FIND function key. If there are requirements/allocations established for the input SSN the data will be displayed in the update mode. At this point you may change the records.

d. Place the cursor on the record to be changed using the NXT REC/(F4) and PRV REC/(F3) function keys or the positional arrow keys.

e. Make desired changes to PRTY, EXPECTED CLASS START DT, REQMT ESTAB DT and/or STATUS.

f. Depress the ADD/UPD function key. If the record was successfully updated, the message UPDATED will appear at the top right corner of the screen.

g. To make additional changes for records for the input SSN, return to step d. above.

h. To make changes to another SSN, return to step a. above.

i. To return to the TRAINING OFFICE MENU, depress the PRV FORM function key twice.

NOTE: You may also update other fields by depressing the NXT FORM function key to access the detailed requirement record below. Position the cursor in the desired field, update the field, depress the ADD/UPD function key followed by PRV FORM to update the record and return to the previous screen.

Reference the section on using Employee Requirements/Allocations detailed screen (UPETR3). If an allocation ‘A’status is set up through the class roster process, the record cannot be changed through the Requirements/Allocations process. If a Requirements Established Date needs to be updated for a course that has a Training Due Date record (Completion Timeframe on Course Data) the system will not allow more time to be added to the Training Due Date.

DELETING REQUIREMENTS BY SSN

a. If the screen is not in the find mode, depress the CLR- FIND/(F13) function key.

b. Input the SSN and/or other search criteria as desired, or ZOOM/(F20) from SSN to Employee Inquiry and bring the data back using the PREVIOUS FORM/(F1) function key.

c. Depress the FIND/(F3) function key. If there are requirements/allocations established for the input SSN the data will be displayed in the update mode. At this point you may delete a record.

d. Place the cursor on the record to be deleted using the NXT REC/PRV REC function keys or the positional arrow keys.

e. Depress the DEL REC/(F18) function key. The message ENTER YES TO CONFIRM DELETE will appear at the bottom of the screen.

f. Confirm the delete by answering YES and depress the ENTER/RETURN key. If the delete was successful, the message DELETED will appear at the top right corner of the screen.

g. If you enter anything other than YES and depress the ENTER/RETURN key, the delete will not take place.

h. To delete additional requirements/allocations for the input SSN, return to step d. above.

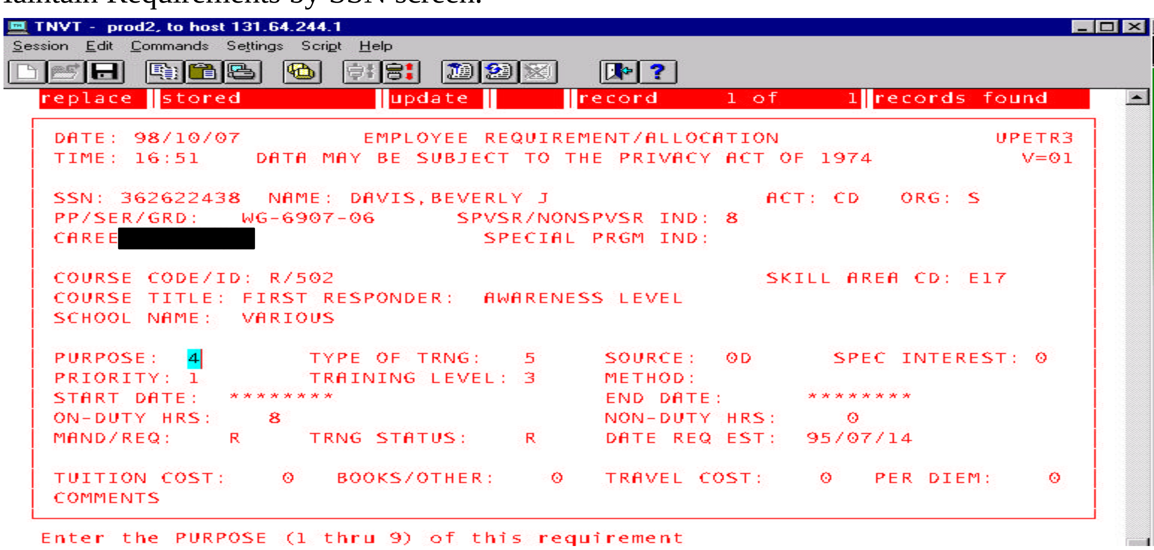
i. To delete requirements/allocations for another SSN, return to step a. above.

j. To return to the TRAINING OFFICE MENU, depress the PRV FORM/(F1) function key twice.

USING THE EMPLOYEE REQUIREMENT/ALLOCATION DETAILED SCREEN (UPETR3)

This detailed screen allows the user to update information regarding the course data and to input cost data for direct costs (tuition and books) and indirect costs (travel and per diem). There is also a 60 character field for any Comments about this specific training need (e.g. special needs for the employee, information about when the employee will be available for the course, or the importance of the employee being allocated to a class immediately). The information in the Comments field will display on the Planned and Allocated Training by Organization Report (which is available from the Reports Menu).

This detailed screen can by accessed from either the Maintain Requirements by Course or the Maintain Requirements by SSN screen.


TNVT - prod2, to host 131.64.244.1
Session Edit Commands Settings Script Help
replace | stored | update | | record 1 of 1 | records found

DATE: 98/10/07 EMPLOYEE REQUIREMENT/ALLOCATION UPETR3
TIME: 16:51 DATA MAY BE SUBJECT TO THE PRIVACY ACT OF 1974 V=01

SSN: 362622438 NAME: DAVIS,BEVERLY J ACT: CD ORG: S
PP/SER/GRD: WG-6907-06 SPVSR/NONSPVSR IND: 8
CAREE[redacted] SPECIAL PRGM IND:

COURSE CODE/ID: R/502 SKILL AREA CD: E17
COURSE TITLE: FIRST RESPONDER: AWARENESS LEVEL
SCHOOL NAME: VARIOUS

PURPOSE: 4 TYPE OF TRNG: 5 SOURCE: OD SPEC INTEREST: 0
PRIORITY: 1 TRAINING LEVEL: 3 METHOD:
START DATE: ******** END DATE: ********
ON-DUTY HRS: 8 NON-DUTY HRS: 0
MAND/REQ: R TRNG STATUS: R DATE REQ EST: 95/07/14

TUITION COST: 0 BOOKS/OTHER: 0 TRAVEL COST: 0 PER DIEM: 0
COMMENTS

Enter the PURPOSE (1 thru 9) of this requirement

UPDATING/CHANGING THE EMPLOYEE REQUIREMENT/ALLOCATION SCREEN

a. Your cursor will be resting on the Purpose field. You are able to update any field that your cursor will land on (e.g. Purpose, Special Interest, Priority, On-Duty Hours, Cost data, and Comments). HELP screens are available for the data fields that you land on by pressing the F5 function key. Press the ENTER/RETURN key to stop displaying the HELP screen and then input the valid data.

NOTE: The employee data that displays on this screen is received from DCPDS and is updated every two weeks.

NOTE: The four cost fields (Tuition, Books, Travel and Per Diem) can hold dollars only.

b. Any time a change occurs to a record, the record must be updated by pressing the ADD/UPDATE (F9) function key.

c. After reviewing the record or making changes to the record, press PREVIOUS FORM (F1) to return to the initial Requirements screen.