Back-Entry of a Session

From Administrator **Main Menu**

- **Sessions**
- Create Classroom Session
- Type in either the Title or the Local Code of the Learning you wish to schedule as a session.
  *If only a portion of the title or local code is known, use a * or % wildcard.*
- SEARCH
- Click on the Underlined Blue Learning Title that you want to schedule as a session.

NOTE: *From this point you must fill in all fields marked with a red asterisk * before you can save your work.*

*General

- Session Title *:
  - Type in a title or copy the title from the top of the page after **Session Details>.**
- Local Code:
  - **Leave blank – E-Track assigns a unique Local Session Code (beginning with OCWT) for each session.**
- Geographic County*:
  - Click on the field and, from the drop-down menu, select the county in which the session will be held.
- Responsible Organization *:
  - Click on the icon.
  - Click on the OCWTP folder.
  - Click on the Regional Training Centers folder.
  - Click on your Regional Training Center or other organization **responsible for trainer payment.**
- Start Date:
  - Type or use the calendar icon to assign the first date of the session.
- End Date:
  - Type or use the calendar icon to assign the last date of the session.
- OCWTP Hrs:
  - *This field is pre-filled and cannot be changed. If this field displays a number other than the desired number of hours, you may need to either select a different learning or work with the facilitator to develop a learning for the number of hours needed.*

Booking & Meeting Times

- Click on [Define Meeting Times].
  - **START/END TIMES**:
    - Assign start and end date and times for the **first day** of the session.
      (*Be sure to select AM or PM for each time assignment. Click directly on AM or PM to switch.)*
  - **Assign the meeting room for the first day of the session:**
    - Click on Select Meeting Room.
    - Click on yellow folder icons until the address for the desired location is displayed.
    - Click on Underlined Blue Location Address.

For multiple-day sessions, after you've entered the date, times, and location for the first day, repeat these steps to enter the date, time, and meeting room for each subsequent day. As you add the meeting room for each day, you'll see that E-Track reorders the list so the first day is at the top.

Also note: The START/END DATES *for each day of a multi-day session should be the same*.

***** Special Note: All *required information must be entered and the session saved before assigning the facilitator.***

*Delivery

- Method *:
  - *Pre-selected - Do not change the information in the Method field.*
- Contract Status *:
  - Click in the field and assign a Contract Status of **NA**.

Materials (SKIP THIS TAB)

People

- OBSERVERS - If desired, assign Observer(s):
  - Click on the green plus sign to the right of OBSERVERS
  - Type the observer's last and first name into the Name fields.
    A wildcard (or %) may be used before and/or after any part of a person's name.*
  - Search
  - ☑ Check the box beside the desired observer's name
  - OK
- CONTACTS (SKIP THIS SECTION)

Registration

- Registration Mode (*Default setting is* Open)
  - For back-entered sessions, it's unlikely that changes to registration options are necessary.
- Open Date *(Default is date you create session)*
  - *Type or use the calendar icon to assign a registration Open Date that is EARLIER than the Close Date*.
- Close Date *(Default is session start date)*
  - *Type or use the calendar icon to assign a different registration Close Date.*
- Automatic Wait List Management (Default is Automatic Wait List Management is selected.)
  For back-entry of sessions, there is no need to change Wait List Management settings.

Security

When back-entering a session, there should be no need to make changes to the information on the Security tab.

Surveys & Certificates

- Click on the underlined survey title
- Delivery:
  - Change Send Survey settings to ◉ **At** Enrolllment
- Notification – DO ONE OF THE FOLLOWING:
  - If end users will be completing electronic surveys, do not make changes to the Notification tab information.
  - If RTC staff is back-entering survey responses from paper surveys, uncheck the Recipient box to stop delivery of survey notifications.
- to save survey settings

Collaboration – SKIP THIS TAB

*Billing & Cost

Revenue Account*

- Click in the drop-down field and select the appropriate Revenue Account.
  (The Revenue Account is determined by what funding stream will be used to pay the facilitator.

Automatic Completion/Close – SKIP THIS TAB

Notifications

- Turn the following notifications OFF.

Enrollment Notice	Installation	Off	Installation
Enrollment Notice - Alternate Contact Copy	Installation	Off	Installation
Enrollment Notice - Contact's Copy	Installation	Off	Installation
Enrollment Notice - Supervisor's Copy	Installation	Off	Installation
Enrollment Reminder Notice	Installation	Off	Installation
Enrollment Reminder Notice - Alternate Contact Copy	Installation	Off	Installation
Enrollment Reminder Notice - Supervisor's Copy	Installation	Off	Installation

and

Notify Facilitator You have been Assigned - Facilitator	Installation	Off	Installation

*If you do not want certificate links to be e-mailed to participants, you must also turn off the

Learning Completion Notice	Installation	On	Installation

Notes

- In the Notes field, record any special circumstances regarding this session.

User Defined Fields

Fiscal Notes

- In the VALUE field, type any special payment arrangements *(i.e. if the facilitator arrives and thus is paid for a session that is cancelled due to inclement weather, or if a facilitator is paid an amount different from the $550/6-hr standard rate.)*

System – SKIP THIS TAB

(*Note: The System tab shows who created and who last accessed the session, and when.*)

- Click the icon to save the session.
- At the E-Track – Save Session pop-up, check all boxes.
- OK

Assign a facilitator:

Return to the Booking and Meeting Times tab to assign facilitator(s).
Facilitator(s) <u>must</u> be assigned to <u>each day</u> of training.

- Click on the  button
- Click 
- Check the box beside the facilitator's name. (More than one facilitator may be selected.)
- If there are multiple facilitators, designate a primary facilitator by clicking on Make Primary.
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VERY IMPORTANT: If RTC staff is entering survey responses, do so as soon as possible to minimize confusion caused by outdated surveys appearing on attendees' to-do lists. See "Back-Entry of Survey" instructions.