Creating 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 *:
  - o Click in the field and assign a Contract Status of **NA**.

Materials (SKIP THIS TAB)

People

- **OBSERVERS** - If desired, assign Observer(s):
  - o Click on the green plus sign to the right of **OBSERVERS**
  - o 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.*
  - o Search
  - o ☑ Check the box beside the desired observer's name
  - o OK
- **CONTACTS** (SKIP THIS SECTION)

Registration

- Registration Mode (*Default setting is* Open)
  - o To change the registration, click in the drop-down field and click on "Restricted" to select.
    ***Open registration** – End users may enroll themselves in the session.*
    ***Restricted registration** – Interested persons must contact the Session Registrar or another RTC staff to register. If selecting Registration Mode of Restricted, be sure to assign a Registrar (on the Security tab).*
    Remember to set* Registration Mode *to* Restricted *for all Preservice sessions.
- Open Date *(Default is date you create session)*
  - o *Type or use the calendar icon to assign a different registration Open Date.*
- Close Date *(Default is session start date)*
  - o *Type or use the calendar icon to assign a different registration Close Date.*
    It is strongly recommended that the registration window be set to close at least one day prior to the session start date.)
- Automatic Wait List Management (Default is Automatic Wait List Management is selected.)
  Uncheck if you do NOT want E-Track to automatically move people into session from wait list.

Security

Browse Access *(Default is Global Browse)* – Allows all end users to see the session.

Enroll Access *(Default is Global Enroll)* – Allows all end users to register for the session.

Global Browse/Global Enroll is the default setting and generally should not be changed.

NOTE: *If you want to restrict registration to only people within a particular region, county, or other hierarchical level, you have the option of changing the Browse Access setting to* **Local Browse**. *This prevents people from outside the assigned hierarchical levels from seeing the session.*

To change browse settings:

- Switch the **Browse Access** to Local Browse

- Assign the **LOCAL BROWSE HIERARCHIES** (Who do you want to be able to see the session?):
  - Click on the green plus sign to the right of **LOCAL BROWSE HIERARCHIES**.
  - Click on the yellow OCWTP folder and continue clicking on yellow folder icons until desired hierarchical levels are displayed.
  - ☑ Check the box(es) beside the desired hierarchical level(s). *Multiple levels can be added simultaneously*.
  - OK
  - Leave **Enroll Access** at Global Enroll.

REGISTRARS

A REGISTRAR MUST BE ASSIGNED IF **REGISTRATION MODE** ***IS RESTRICTED.***

REGISTRARS can only manage registrations for a session. They cannot edit session information.

- Click on the green plus sign to the right of **REGISTRARS**.
- Type the observer's last and first names 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 registrar's name
- OK

STEWARDS

Whoever creates the session is automatically listed as a STEWARD, and staff from the same RTC automatically has session privileges, including editing session information and managing registrations.
When a session is being co-sponsored by multiple RTCs, people from other RTCs can be added as session Stewards:

- Click on the green plus sign to the right of **STEWARDS**.
- Type the steward'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 registrar's name
- OK

Surveys & Certificates – SKIP THIS TAB

For future session, the Survey and Certificate information is pre-set and should not be changed. If creating a session for a past training event, refer to instructions for Back-Entry of E-Track Sessions.)

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 – SKIP THIS TAB

Notes

- In the Notes field, record any special circumstances regarding this session *(i.e. any changes made to location or facilitator, etc.).*

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.

Assign a facilitator:

Return to the Booking and Meeting Times tab to assign facilitator(s) – ***Facilitator(s) must be assigned to each day of training.***

- Facilitator Catalog
- Search
- ☑ Check the box beside the desired facilitator’s name (More than one facilitator may be selected)
- OK
- If there are multiple facilitators, designate a primary facilitator by clicking on Make Primary