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# LSO Administrator Guide

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# LSO Administrator Training

## Participant Guide

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## **Module 1: Introduction**

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Welcome to LSO Administrator training. This course is intended for agency administrators assigned one of the following roles:

- Training Administrator
- Course Administrator

For purposes of this training, all participants have been assigned the Training Administrator role, which provides additional access and functionality in LSO.

We will highlight the differences between the two roles throughout the training when appropriate. Please consult with your Agency Training Officer to confirm the role you have been assigned for Production LSO.

## **LSO Support**

Agency Training Officers who have questions about LSO functionality or training business processes should submit an email describing their issue to the enterprise LSO resource account at [ra-lsoadministrator@pa.gov](mailto:ra-lsoadministrator@pa.gov).

LSO functionality questions would include assistance with items such as:

- Creating Groups (agency folders)
- Creating Course Types
- Creating Courses
- Mass enrollments
- Participation reports
- Standard LSO reports
- Custom LSO reports

Training business process questions would include assistance with items such as:

- Training Strategies
- Course authoring issues
- Enterprise training initiatives
- Training consultations
- Course development
- LSO training
- Assistance with proper role assignments
- Web-based publishing/loading

**LSO Administrators** should consult their Agency Training Officer prior to forwarding any issues to the LSO resource account.

Should end users have any questions, they should contact their Agency Training Officer.

Agencies that are serviced by the HR Service Center can contact the center at 1.866.377.2672. Agencies that are not serviced by the HR Service Center should either contact their Agency Training Officer or HR Office.

## Overview of Basic LSO Course Structure

### LSO Course Groups=Folders/Subfolders

Course Groups in LSO are containers in which Course Types and courses are held. They act as folders and subfolders in the system.



### LSO Course Types=Course Masters

A Course Type in LSO contains information that is consistent for all scheduled course sessions. Information entered in the Course Type transfers to all associated courses.



### LSO Courses=Scheduled Offerings

Courses in LSO are the actual training sessions you will offer. They have a date, time and location, and may have additional resources assigned to them.

**Note:** If you create a Course Group, Course Type or Course and can't locate it in the system, please email OA, HRD at [ra-lsoadministrator@pa.gov](mailto:ra-lsoadministrator@pa.gov) before creating another instance. OA, HRD may be able to help you locate it and prevent your catalog from becoming cluttered.

## Configuring Your Settings

To ensure that you can create Course Groups, Course Types and Courses for future dates, and view additional information in the Course Catalog:

1. Click the Training Administrator link.
2. Click the Courses link.
3. Click the Course link.
4. Click the Dynamic Course Menu link.
5. Click the Change Settings icon .  
"Change User-Defined Settings" pop-up window appears.
6. Select the "Reporting" tab:  
'Currency Key' field should remain blank.  
Check all available check boxes.
7. Select the "MasterData" tab:  
Check all available check boxes.  
The 'From' date should reflect 01/01/1900 and the 'To' date should reflect 12/31/9999.  
The radio button should reflect with 'Course Group'.
8. Select the "View" tab:  
Check all available check boxes.
9. Select the "Dynamic Menus" tab:  
Select the "Filter" sub-tab:  
The radio button should reflect "All" for the entire list.  
All other fields should remain blank.
10. Select the "Sort Order" sub-tab:  
All fields should remain blank.
11. Select the "Course Menus" sub-tab:  
The 'From' date should reflect 01/01/1900 and the 'To' date should reflect 12/31/9999.  
The "Fixed Date" can be left unchecked.  
The radio button should reflect with 'Course Group'.
12. Select the "Planning Menu" sub-tab:  
Repeat step #11 for the items within this sub-tab.
13. Select the "Resource Menu" sub-tab:  
The 'From' date should reflect 01/01/1900 and the 'To' date should reflect 12/31/9999.  
The "Fixed Date" can be left unchecked.  
The radio button should reflect with 'Resource Type'.
14. Select the "Tool Menu" sub-tab:  
Repeat step #11 for the items within this sub-tab.
15. Click the "Save" icon . You may receive a message indicating that the end date was corrected to the allowed maximum. This message is ok and you can select the green checkmark.

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## Module 2: LSO Overview Page

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The LSO Overview page contains the **Worklist of Courses** and **Booking, Prebooking, and Waitlist Monitor** sections.

The **Worklist of Courses** section has two categories in the **Active Queries** subsection:

- **Courses:** Courses currently scheduled. You can search for courses using different parameters (This Week, Next 2 Weeks, This Month and Next month) by clicking the appropriate link.
- **Course Follow-up:** Past courses that have been completed and are awaiting follow-up. You can search for courses using different parameters (Last 2 Weeks and Last Month) by clicking the appropriate link.

You will see a numeric count in the link if courses are scheduled or awaiting follow-up in the above timeframes.

After clicking a timeframe link, a corresponding course list will appear.

Later in this course, we will review how to use the **Worklist of Courses** section to perform some of your administrative tasks.

The **Booking, Prebooking, and Waitlist Monitor** section has four **Bookings** links in the **Active Queries** subsection:

- **Too low bookings - 3 months:** Allows you to view courses scheduled for the next three months that have not yet exceeded the minimum number of participants.
- **Course Capacity Reached - 3 Months:** Allows you to view courses scheduled for the next three months that reached the maximum number of participants.
- **Too high Prebookings - 9 Months:** Allows you to view courses over the next nine months that have a high number of prebooked participants.
- **Too many waitlist bookings - 9 months:** Allows you to view courses scheduled for the next nine months that have exceeded the maximum number of waitlist participants.

You will see a numeric count in the link if there are courses that meet the above criteria.

After clicking a link, a corresponding course list will appear.

Note: Numeric counts will initially default to zero (0) the first time you enter the Overview page. You must individually refresh each link at least one time to generate the accurate count.

Employee Self Service LSO

LSO > LSO > Overview

Full Screen Options

### Worklist of Courses

Active Queries

Courses [This Week \(100\)](#) [Next 2 Weeks \(108\)](#) [This Month \(114\)](#) [Next Month \(107\)](#)  
 Course Follow-up [Last 2 Weeks \(104\)](#) [Last Month \(129\)](#)

Courses - This Week

View: [Standard View] Change Course Manage Participation Correspondence Worklist Follow-Up Print Sign-in Roster Firmly Book Export

Course Name	Status of Course Preparation	Capacity	Start Date, Time	Location
<a href="#">quiz test ΔY</a>	◇	00		
<a href="#">PUB 93</a>	◇			
<a href="#">Introduction to Sect 4(f)</a>	◇			
<a href="#">inRoads-Named Levels_Feature Naming</a>	◇			
<a href="#">inRoads-Placing the Dan on Sheets</a>	◇			

Last Refresh 02/03/2015 07:46:48 EST Refresh

### Booking, Prebooking, and Waitlist Monitor

Active Queries

Bookings [Too low bookings - 3 months \(164\)](#) [Course Capacity Reached - 3 Months \(23\)](#) [Too high Prebookings - 9 Months \(1\)](#) [Too many waitlist bookings - 9 months \(5\)](#)

Bookings - Too low bookings - 3 months

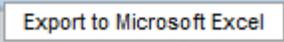
View: [Standard View] Print Sign-in Roster Export

Status	Cause of Alert	Course/Course Type	Current Value	Minimum capacity	Optimum capacity	Maximum capacity	Course Start Date	Course Location
△	Too Few Bookings	<a href="#">Road Condition Reporting Sys (RCRS)</a>		1	50	60	05/14/2013	
△	Too Few Bookings	<a href="#">Road Condition Reporting Sys (RCRS)</a>		1	50	60	06/11/2013	
△	Too Few Bookings	<a href="#">Road Condition Reporting Sys (RCRS)</a>		1	50	60	07/09/2013	
△	Too Few Bookings	<a href="#">Bridge Inspection Refresher</a>	12	25	35	40	04/23/2013	Cltvt. Agriculture Region 7
△	Too Few Bookings	<a href="#">Correspondence_Change Location01</a>		10	20	30	06/01/2013	Hrsbrg: Strawberry Squared
△	Too Few Bookings	<a href="#">Correspondence_Change Location01</a>		10	20	30	07/01/2013	Hrsbrg: Strawberry Squared

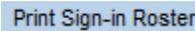
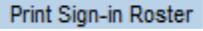
100%

From the **Booking, Prebooking, and Waitlist Monitor** section, you can export a list of courses to Excel format, or view/print a sign-in roster for a specific course.

To export a list of courses to Excel format:

1. Click the Overview link.
2. Within the Booking, Prebooking, and Waitlist Monitor section, click the appropriate bookings link.  
A list of courses appears.
3. Click the Export button .
4. Click Export to Microsoft Excel .

To view/print a sign-in roster for a specific course:

1. Select a course from the list by clicking the box  left of the course title.  
The course row is highlighted and the "Print Sign-In Roster" button  is activated.
2. Click the "Print Sign-In Roster" button .
3. Hover your cursor over the course roster.  
An Adobe task bar appears.  
Note: You can also activate this bar by selecting the "F8" key on your keyboard.
4. Click the "Print file" icon .

## **Activity**

Check mark each task after completing.

- Refresh each link in the Active Queries sections to generate a count/list. Note: You will only have to do this one time. The counts/lists will display after refreshing the first time.
- Click the **Too low bookings - 3 months** link in the **Booking, Prebooking, and Waitlist Monitor** section.
- Export a list of courses to Excel.
- Select a course that has bookings and view the Sign-In Roster.
- Hover your cursor over the roster to make the Adobe task bar appear.
- Locate the "Print file" icon. **DO NOT ACTUALLY PRINT.**

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## Module 3: Creating Agency Course Groups

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### LSO Course Groups=Folders

Course Groups in LSO are containers in which Course Types and courses are held. They act as folders and subfolders in the system.

In the "live" LSO, agency administrators will be able to create Course Groups (subfolders) at the third tier of the catalog structure and below.

NOTE: This only can be performed by users with the Training Administrator role.

Catalog-First Tier-**Agency and Enterprise Course Groups (Folders)** - Locked

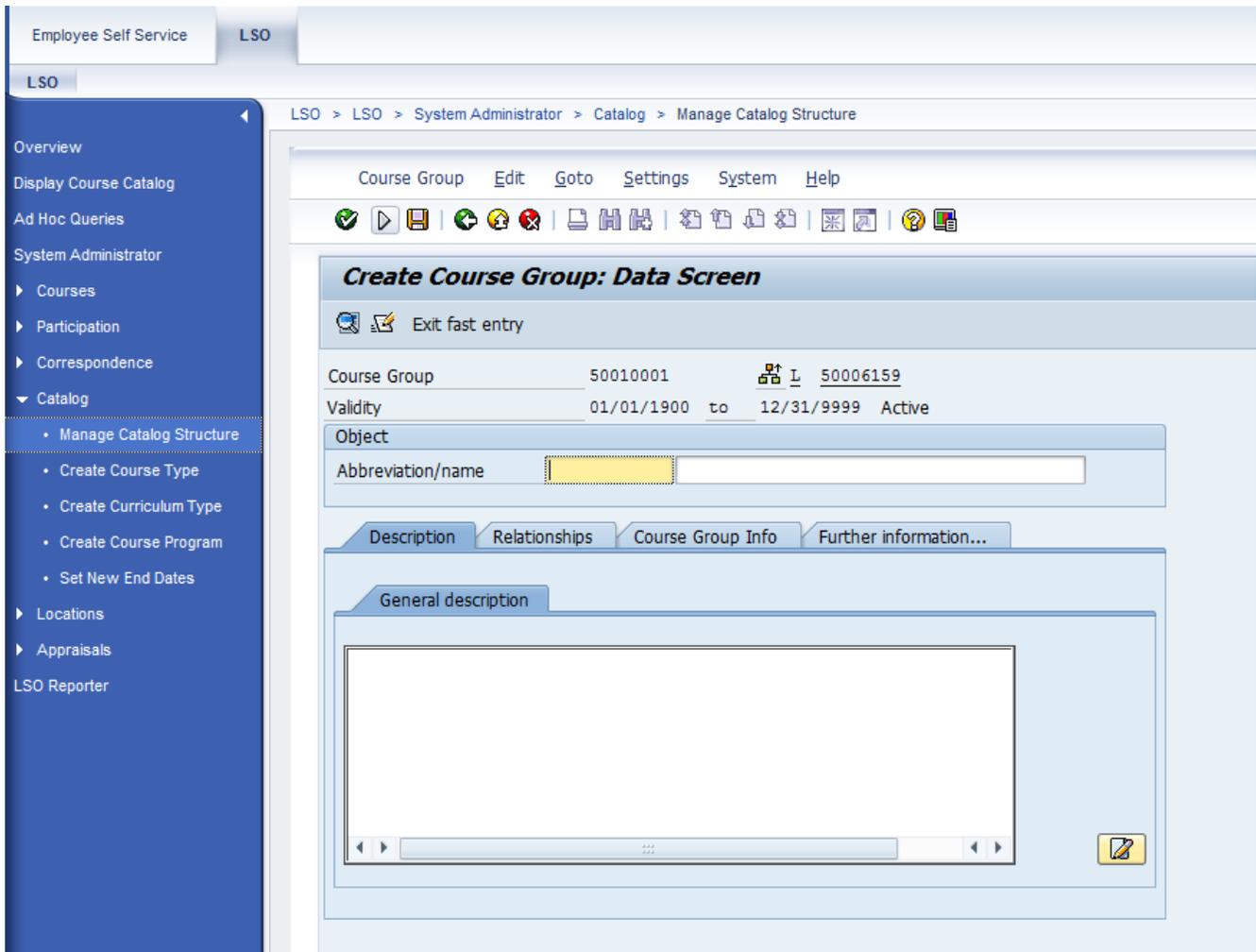


Catalog-Second Tier-**Agency and Enterprise Course Groups (Subfolders)** - Unlocked



To create agency Course Groups (subfolders) at the second tier of the catalog and below, use the following procedure:

1. Click the Training Administrator link.
2. Click the Catalog link.
3. Click the Manage Catalog Structure link.
4. Locate your agency folder.
5. Right click on the folder.  
A pop-up menu appears.
6. Click "Create Level Lower."  
A Relationship pop-up window appears.
7. Double click "Course Group."  
"Course Group: Initial Screen" appears.
8. Click the "Create" icon .  
"Create Course Group: Data Screen" appears.



9. Complete the Abbreviation and Name fields using the following naming conventions:  
 Abbreviation: agency number + abbreviation of subfolder name  
 Example: 81ADMIN  
 Note: This must be unique.  
 Name: Folder name  
 Example: Courses for Administrators  
 Notes: Character limitation for abbreviations: 12  
 Character limitation for names: 40
10. Click the "Further Information" tab.
11. Click the "Create" icon  right of "Cust. Att. for Course Grp." "Change Cust. Att. for Course Grp" screen appears.
12. Enter your agency's Business Area number.  
 Notes: You can also add additional agency Business Area Numbers if you would like those agencies to have access to the Course Group.

To make the Course group available to all agencies, check the "Available to All Business Areas" box.

13. Click the "Save" icon .
14. Click the "Save" icon again .  
Agency Course Group (subfolder) has been created.

### **Activity**

Check mark each task after completing.

- Locate your agency Course Group (folder).
- Create an agency Course Group (subfolder) within your agency folder.  
Use your agency name, initials and "T3" to name the subfolder.  
Example: Health ML T3
- Write down the abbreviation/name of the subfolder you just created.  
You will be using this subfolder throughout the training.

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## Module 4: Creating/Changing Course Types

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### LSO Course Types=Course Masters

A Course Type in LSO should contain information that is consistent for all scheduled course sessions. Information entered in the Course Type transfers to all associated courses.

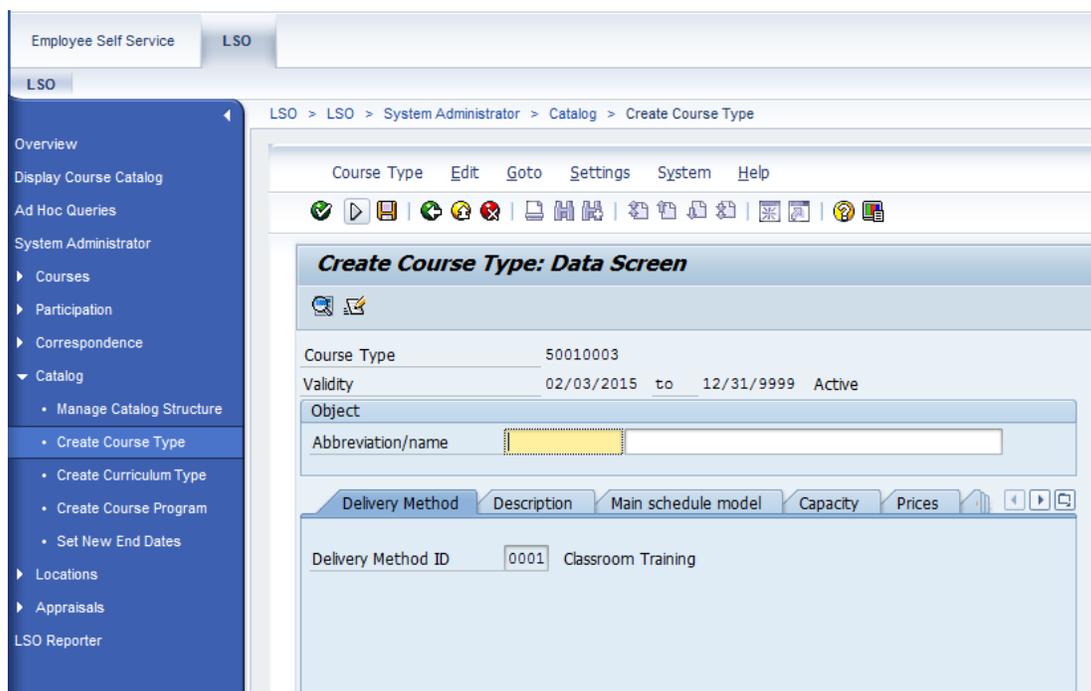
NOTE: This only can be performed by users with the Training Administrator role.

We'll cover how to create Course Types for the two most common delivery methods:

- Classroom
- Web-based training

### Classroom

1. Click the Training Administrator link.
2. Click the Catalog link.
3. Click the Create Course Type link.  
"Course Type: Initial Screen" appears.
4. Click the "Create" icon .  
Delivery Method pop-up window appears.
5. Double click on "Classroom Training."  
"Create Course Type: Data Screen" appears.



The screenshot shows the LSO (Learning System Online) interface for creating a course type. The breadcrumb trail is LSO > LSO > System Administrator > Catalog > Create Course Type. The main content area is titled "Create Course Type: Data Screen" and contains the following information:

Course Type	50010003
Validity	02/03/2015 to 12/31/9999 Active
Object	Abbreviation/name

Below this information, there are tabs for "Delivery Method", "Description", "Main schedule model", "Capacity", and "Prices". The "Delivery Method" tab is selected, showing a "Delivery Method ID" of "0001" and the name "Classroom Training".

6. Complete the Abbreviation and Name fields using the following naming conventions:

Abbreviation: agency number + abbreviation of Course Type name

Example: 81EFFWR

Note: This must be unique.

Name: Course Type name

Example: Effective Writing

7. Click and complete the following tabs:

- a. Description (This field is optional)

Enter information in the following subtabs:

- Course Description
- Course Objectives
- Additional Course Info
- Course Category
- Old Course Name
- ADA Information

- b. Main schedule model

Select a schedule or manually create a schedule.

Note: This can be changed at the Course level.

- c. Capacity

Complete the Minimum (least number of participants in order to conduct training), Optimum (number that participants can self-book up to) and Maximum (number that administrators can book participants up to via essential bookings) capacity fields. The maximum number should be higher than the optimum number to allow administrators the ability to book additional participants via essential bookings.

Note:

These values can be changed at the course level.

Waitlist will be created after optimum number is surpassed via self booking.

- d. Prices

Complete the Internal and External price fields, if necessary.

- e. Course Type Info

- Include in brochure (leave checked)
- No Intranet (If checked, learners cannot see the course. This is used if the course should be hidden from learners. Administrators will still see it.)
- Booking option

f. Relationships

- Select the Course Group (subfolder) the Course Type belongs to by searching  in the ID rel. object field. **THIS IS VERY IMPORTANT!** You must change the default Course Group to the appropriate agency Course Group here.
- Select necessary resources (i.e. Classroom, Instructor), if appropriate.
- Add Qualifications, if appropriate.

g. Validity period

Complete the Years and Months fields, if applicable.

Note:

- This is used to set a time period that a qualification would expire, if qualifications were added.
- When creating a Course Type, the Validity Period tab is linked to qualifications and **does not** perform the same functionality as the "No Internet" check box found on the Course Type Info tab.

h. Further information

Scroll to locate the "Cust. Att. for Hrs & CEU" section:

- Click the "Create" icon .
- Check "Course Self Booking Indicator".
- Add training hours and CEU information, if applicable.
- Click the "Save" icon .

Scroll to locate the "Workflow Settings" section:

- Click the "Create" icon .
- "Change Workflow Settings" screen appears.
- To turn off workflow (no approval required); fill in the fields as shown in the screenshot.

**Change Workflow Settings**

Course Type: 81 EFFWR Effective Writing  
 Planning Status: Active  
 Validity: 02/03/2015 to 12/31/9999 Change Info

Workflow Settings 01 D 50010004 1

Activity T.	LT	Task	Obj. Type	Event	E	R	A
BOOK	P	97500002	LSO_PARTIC	BOOKREQUEST	D	0	0
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	<input checked="" type="checkbox"/>						
	<input checked="" type="checkbox"/>						
	<input checked="" type="checkbox"/>						
	<input checked="" type="checkbox"/>						
	<input checked="" type="checkbox"/>						
	<input checked="" type="checkbox"/>						
	<input checked="" type="checkbox"/>						

Entry 1 of 0 Rec. 1 of 0

Note: You must click the "Save" icon  when in this tab to save changes.

- Click the "Save" icon  again. "Course type was created" message appears at the bottom of the screen.

### **Adding Multiple Instructors to Classroom Training:**

To add multiple instructors, you will need to create two relationships on the Course Type. The first relationship will require the course to have a resource type: Instructor.

- Click the "Create" icon  for the Requires Resource type relationship field.  
 "Relationships: Requires resource type" screen appears.
- Click the "Search" icon  in the Search term column.  
 "Search Term" screen appears.
- Enter Instructor into the Search Term field and click the green checkmark.  
 Search results screen appears.

4. Check the box next to Instructor.
5. Click the green checkmark.
6. Click the "Save" icon .

The second relationship you will need to create is to hold the Instructor position for the Persons who will be the Instructors.

1. Click the "Create" icon  for the Is held by Person relationship field.  
"Relationships: Is held by Person" screen appears.
2. Click the "Search" icon  in the Search term column.
3. Search for the Person using one of the available search options and click the green checkmark.  
Search results screen appears.
4. Check the box next to the Person.
5. Click the green checkmark.
6. Repeat steps for the 2<sup>nd</sup> Person.
7. Click the "Save" icon .
8. Click the "Save" icon  again to save the Course Type.

1. Click the Instructors tab.
2. Click the "Allocate Automatically" button [Allocate Automatically](#) to populate the Persons from the previously created relationship.
3. Highlight both names and click "OK".
4. To assign specific times to each Instructor, click the "Change Time-Specific Reservation" button [Change Time-Specific Reservation](#).
5. Adjust the Start Time and End Time for each Instructor.
6. Click "OK".

## Web-Based Training

1. Click the Training Administrator link.
2. Click the Catalog link.
3. Click the Create Course Type link.  
"Course Type: Initial Screen" appears.
4. Click the "Create" icon   
Delivery Method pop-up window appears.
5. Double click on "Web-Based Training."  
"Create Course Type: Data Screen" appears.

6. Complete the Abbreviation and Name fields using the following naming conventions:

Abbreviation: agency number + abbreviation of Course Type name

Example: 81ETHICS

Note: This must be unique.

Name: Course Type name

Example: Ethics for Employees

7. Click and complete the following tabs:

- a. Course Type Content

This is where you create a relationship to your web-based content, which has already been imported through the LSO Authoring Environment, with the Course Type.

- I. Click the "Search" icon  in the 'Content Type' field.

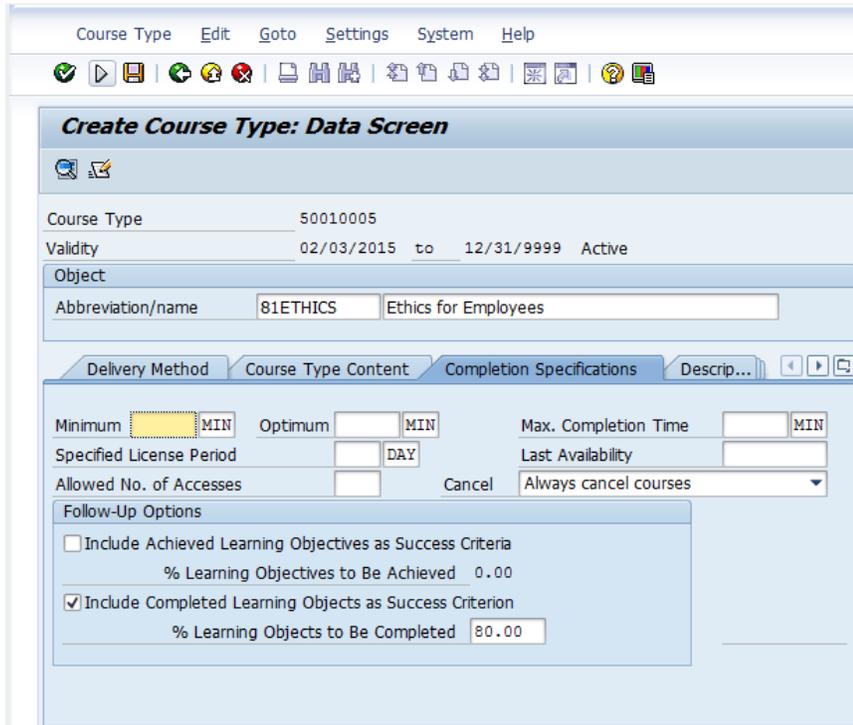
Course Content Type pop-up window appears.

Note: To locate the web-based training, you can search by title of the training or by the author of who created the web-based training, as long you input this information through the LSO Authoring Environment.

- II. Click the green checkmark .

Course Content Type window appears.

- III. Double click the web-based content you want associated with this course.



Course Type Edit Goto Settings System Help

**Create Course Type: Data Screen**

Course Type 50010005

Validity 02/03/2015 to 12/31/9999 Active

Object

Abbreviation/name 81ETHICS Ethics for Employees

Delivery Method Course Type Content Completion Specifications Descrip...

Minimum MIN Optimum MIN Max. Completion Time MIN

Specified License Period DAY Last Availability

Allowed No. of Accesses Cancel Always cancel courses

Follow-Up Options

Include Achieved Learning Objectives as Success Criteria  
% Learning Objectives to Be Achieved 0.00

Include Completed Learning Objects as Success Criterion  
% Learning Objects to Be Completed 80.00

b. Description

Enter information in the following sub-tabs:

- Course Description
- Course Objectives
- Additional Course Info
- Course Category
- Old Course Name
- ADA Information

c. Prices

Complete the Internal and External price fields, if necessary.

d. Course Type Info

- Include in brochure (leave checked)
- No Intranet (If checked, learners cannot see the course. This is used if the course should be hidden from learners. Administrators will still see it.)
- Booking option

e. Relationships

- Select the Course Group (subfolder) the Course Type belongs to by searching  in the ID rel. object field. **THIS IS VERY IMPORTANT!** You must change the default Course Group to the appropriate agency Course Group here.
- Add Qualifications, if appropriate.

f. Validity period

Complete the Years and Months fields, if applicable.

Note: This is used to set a time period that a qualification would expire, if qualifications were added.

g. Further information

Scroll to locate the "Web Link" section:

- Click the "Create" icon .
- Add link to accessible version of WBT in the 'Web Link' field.

Note: You must click the "Save" icon  when in this field to save changes.

8. Click the "Save" icon . "Course Type was created" message appears.

## **Allow or Block Self Unenroll from Web Based Trainings:**

When creating/changing a Course Type for a Web-Based Training, we now have the option to either allow or block the learner from self un-enrolling from the WBT. To use this new feature, please see the following instructions specific to creating or changing a Course Type for a WBT:

### **To use the indicator during the creation of a Course Type: from the Create Course Type link:**

1. Within the "Further Information" tab, scroll to find "Cust. Att. for Hrs & CEU".

The screenshot shows the 'Create Course Type: Data Screen' interface. On the left is a blue navigation sidebar with the following items: System Administrator, Courses, Participation, Correspondence, Catalog (expanded), Manage Catalog Struct..., Create Course Type (selected), Create Curriculum Type, Create Course Program, Set New End Dates, Locations, Appraisals, and LSO Reporter. The main content area is titled 'Create Course Type: Data Screen' and contains the following information:

- Course Type: 50010063
- Validity: 02/09/2015 to 12/31/9999 Active
- Object: Abbreviation/name: 81SifUnenrol, Self Unenroll from WBTs

Below this information are four tabs: 'Course Type Info', 'Relationships', 'Validity period', and 'Further information...'. The 'Further information...' tab is selected. Underneath, there is an 'Overview' section with a table:

Information	De...	Cr...
Collab. Room Template		
Follow-Up Control Options		
Versioning Options		
<u>Cust. Att. for Hrs &amp; CEU</u>		

2. Click the "Create" icon .

3. You will check the "Course Self Booking Indicator", as you normally would. The new feature is the "Allow WBT Self Un-enroll Indicator".

The screenshot shows a web-based interface for a System Administrator. On the left is a blue navigation menu with the following items: System Administrator, Courses, Participation, Correspondence, Catalog (with sub-items: Manage Catalog Struct., Create Course Type, Create Curriculum Type, Create Course Program, Set New End Dates), Locations, Appraisals, and LSD Reporter. The main content area is titled "Change Cust. Att. for Hrs & CEU". It contains several fields: Course Type (81SIFUnenrol), Planning Status (Active), and Validity (02/09/2015 to 12/31/9999). A yellow button labeled "Display change infor" is visible. Below these fields is a section titled "Cust. Att. for Hrs & CEU 01 D 50010063 1" containing a table of indicators and values:

<input checked="" type="checkbox"/>	Course Self Booking Indicator	
	Educational Unit Type	
	Educational Unit Value	
	Course Credit Hours	
	Actual Training Hours	

At the bottom right of this section, it says "Record 1 of 0". Below the table is another checkbox labeled "Allow WBT Self Unenroll Indicator" which is checked.

**To use the indicator after a Course Type has already been created:  
from the Create Course Type link:**

1. Under the LSO Training Administrator role, click "Catalog" then click "Create Course Type"
2. Find the course type you want to edit.
3. Click the "Change" icon .
4. Within the "Active" tab, scroll to find infotype "Cust. Att. for Hrs & CEU".

- Click the box to the left of "Cust. Att. for Hrs & CEU" to highlight the infotype.

- Click the "Change" icon  if a green checkmark is present next to this infotype. If there is no green checkmark, click the "Create" icon .
- The infotype screen will open and you will be able to check or uncheck the "Allow WBT Self Unenroll Indicator".

8. Click the "Save" icon  once record has been changed.

**With this feature checked within the Course Type:** When booked into a course, learners will have the following option to cancel/un-enroll themselves from the course:

**Learning Progress**

Booking Date	02/04/2015
Course is licensed as of	02/04/2015
First Accessed on	Not Yet Started
Last Accessed on	Not Yet Started
Total Completion Time to Date	0 Minutes
Completed Learning Objects	0.00%
Completion Progress	0.00%
Current Status	0.00%
Completion Status	The course has not yet been passed.

**Start Course**

[Start Course Now](#)

**Cancel**

[Cancel booking for this course.](#)

[Refresh](#)

**With this feature unchecked within the Course Type:** Learners will not have the option to cancel/un-enroll themselves from the course:

**Learning Progress**

Booking Date	02/04/2015
Course is licensed as of	02/04/2015
First Accessed on	Not Yet Started
Last Accessed on	Not Yet Started
Total Completion Time to Date	0 Minutes
Completed Learning Objects	0.00%
Completion Progress	0.00%
Current Status	0.00%
Completion Status	The course has not yet been passed.

**Start Course**

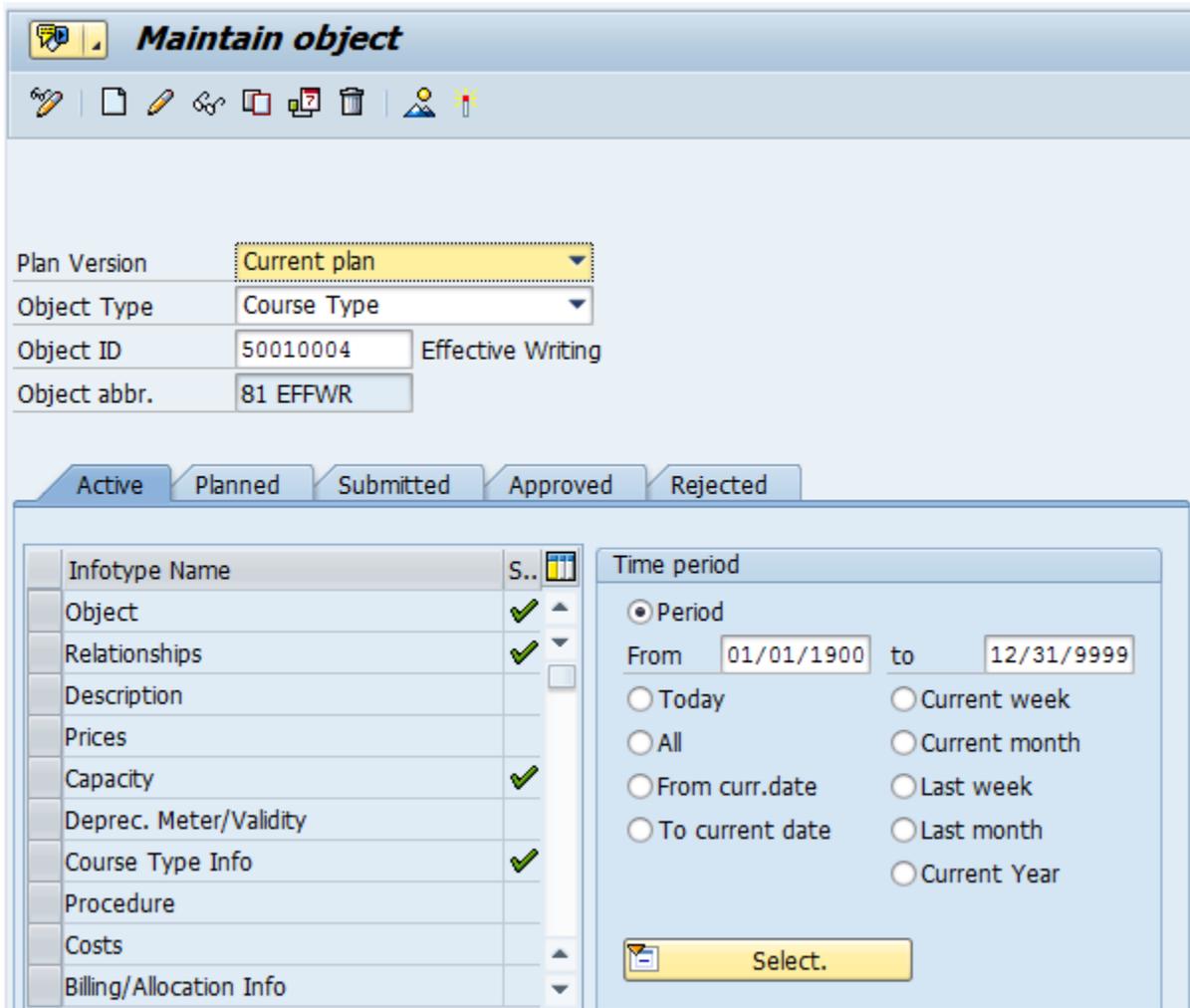
[Start Course Now](#)

[Refresh](#)

## Changing Course Types

You can change/add information to existing Course Types by using the following procedure:

1. Click the Training Administrator link.
2. Click the Catalog link.
3. Click the Create Course Type link.  
"Course Type: Initial Screen" appears.
4. Type or search  for the abbreviation of the Course Type you wish to change in the 'Course Type' field. If using the structured search: once the Course Type has been selected, click the green checkmark .
5. Click the "Change" icon .  
"Maintain Object" screen appears.  
Note: Information already exists for an Infotype if a green checkmark is right of the Infotype name.



**Maintain object**

Plan Version: Current plan  
Object Type: Course Type  
Object ID: 50010004 Effective Writing  
Object abbr.: 81 EFFWR

Active | Planned | Submitted | Approved | Rejected

Infotype Name	
Object	<input checked="" type="checkbox"/>
Relationships	<input checked="" type="checkbox"/>
Description	<input type="checkbox"/>
Prices	<input type="checkbox"/>
Capacity	<input checked="" type="checkbox"/>
Deprec. Meter/Validity	<input type="checkbox"/>
Course Type Info	<input checked="" type="checkbox"/>
Procedure	<input type="checkbox"/>
Costs	<input type="checkbox"/>
Billing/Allocation Info	<input type="checkbox"/>

Time period

Period  
From: 01/01/1900 to: 12/31/9999

Today  Current week  
 All  Current month  
 From curr.date  Last week  
 To current date  Last month  
 Current Year

Select.

To change existing information:

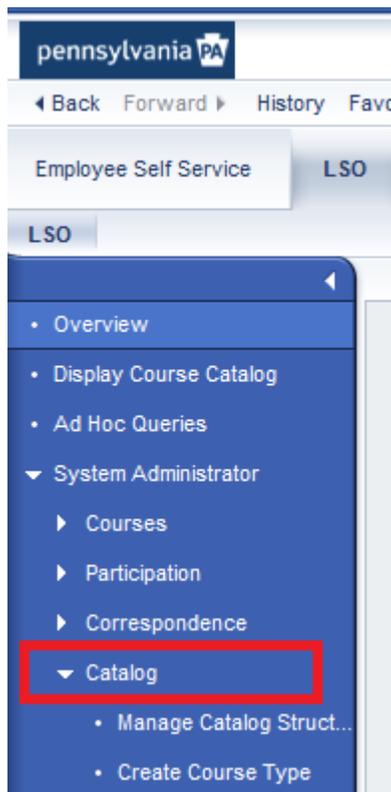
1. Click the box  left of the Infotype you wish to change.  
The Infotype row is now highlighted.
2. Click the "Change Infotype" icon .  
"Change" screen appears.
3. Change information.
4. Click the "Save" icon .

To add information:

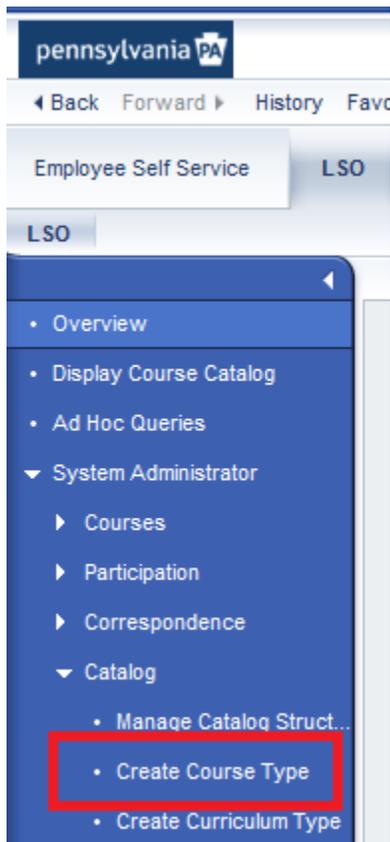
1. Click the box  left of the Infotype you wish to add.  
The Infotype row is now highlighted.
2. Click the "Create Infotype" icon .  
"Create" screen appears.
3. Add information.
4. Click the "Save" icon .

### To associate an Appraisal with a Course Type

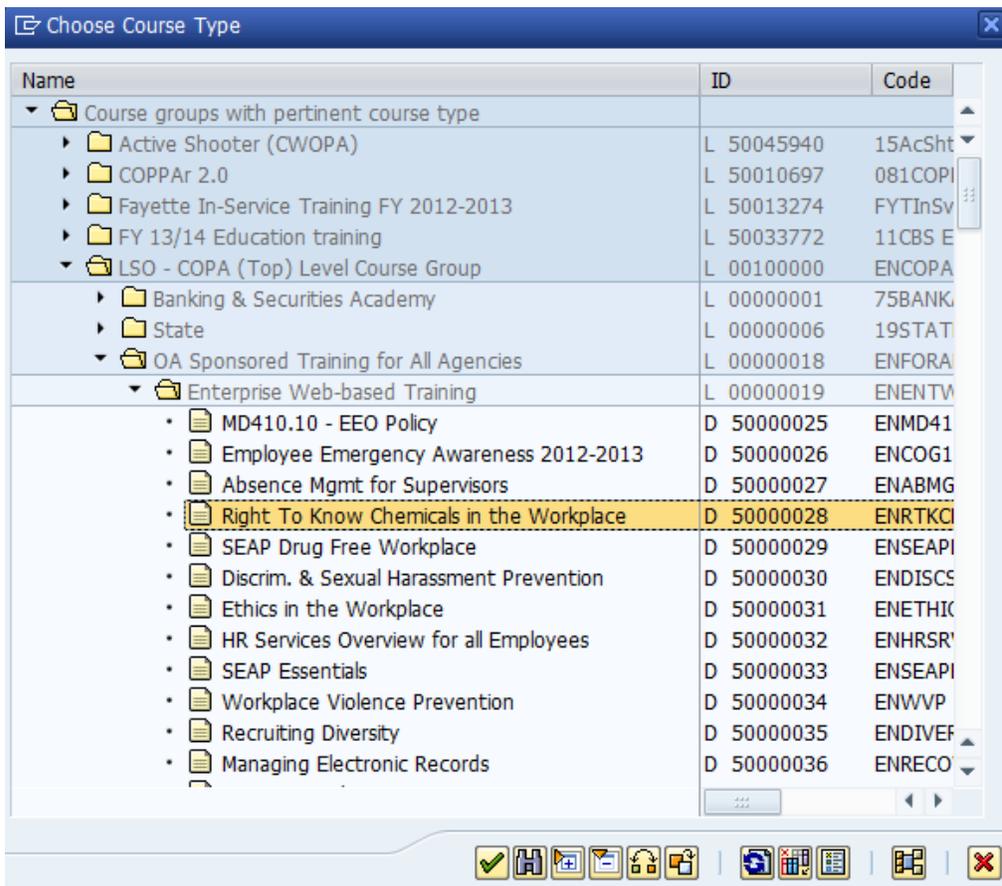
1. In your left hand navigation bar, click on the Catalog link.



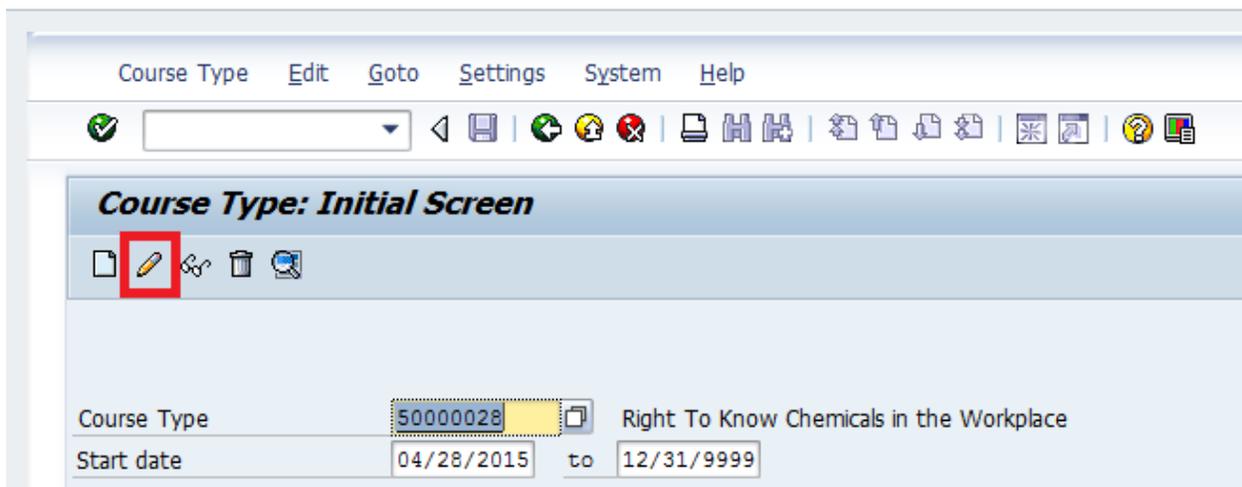
2. Click the Create Course Type link.



3. Enter the Course Type ID Number of the course type you would like to attach an appraisal to. Or, you can use the search function to choose your course type.



- After selecting your course type, click the edit pencil icon to change your course type.



5. You are now presented with the screen to edit your course type. Click the Planned tab.

**Maintain object**

Plan Version:

Object Type:

Object ID:  Right To Know Chemicals in the Workplace

Object abbr.:

Active **Planned** Submitted Approved Rejected

Infotype Name	S..
Object	▲
Relationships	▼
Description	□
Prices	
Capacity	
Deprec. Meter/Validity	
Course Type Info	
Procedure	
Costs	▲
Billing/Allocation Info	▼

Time period

Period

From  to

Today  Current week

All  Current month

From curr.date  Last week

To current date  Last month

Current Year

6. Click the Relationships Infotype row.

The screenshot shows the 'Maintain object' dialog box with the following elements:

- Buttons: Active, Planned, Submitted, Approved, Rejected
- Infotype Name: S..
- Object: Relationships (highlighted with a red box)
- Description: [Empty]
- Prices: [Empty]
- Capacity: [Empty]
- Deprec. Meter/Validity: [Empty]
- Course Type Info: [Empty]
- Procedure: [Empty]
- Costs: [Empty]
- Billing/Allocation Info: [Empty]
- Time period: Period (selected), From: 01/01/1900, to: 12/31/9999
- Radio buttons: Today, All, From curr.date, To current date, Current week, Current month, Last week, Last month, Current Year
- Button: Select.

7. Click the piece of paper icon to Create a new relationship.

The screenshot shows the 'Maintain object' dialog box with the following elements:

- Buttons: Active, Planned, Submitted, Approved, Rejected
- Infotype Name: S..
- Object: Relationships (highlighted with a red box)
- Description: [Empty]
- Prices: [Empty]
- Capacity: [Empty]
- Deprec. Meter/Validity: [Empty]
- Course Type Info: [Empty]
- Procedure: [Empty]
- Costs: [Empty]
- Billing/Allocation Info: [Empty]
- Time period: Period (selected), From: 01/01/1900, to: 12/31/9999
- Radio buttons: Today, All, From curr.date, To current date, Current week, Current month, Last week, Last month, Current Year
- Button: Select.

Additional details from the dialog box:

- Plan Version: Current plan
- Object Type: Course Type
- Object ID: 50000028 Right To Know Chemicals in the Workplace
- Object abbr.: ENRTKCHEM
- Toolbar: Includes a piece of paper icon (highlighted with a red box), a pencil icon, a magnifying glass icon, a trash icon, and a lightbulb icon.

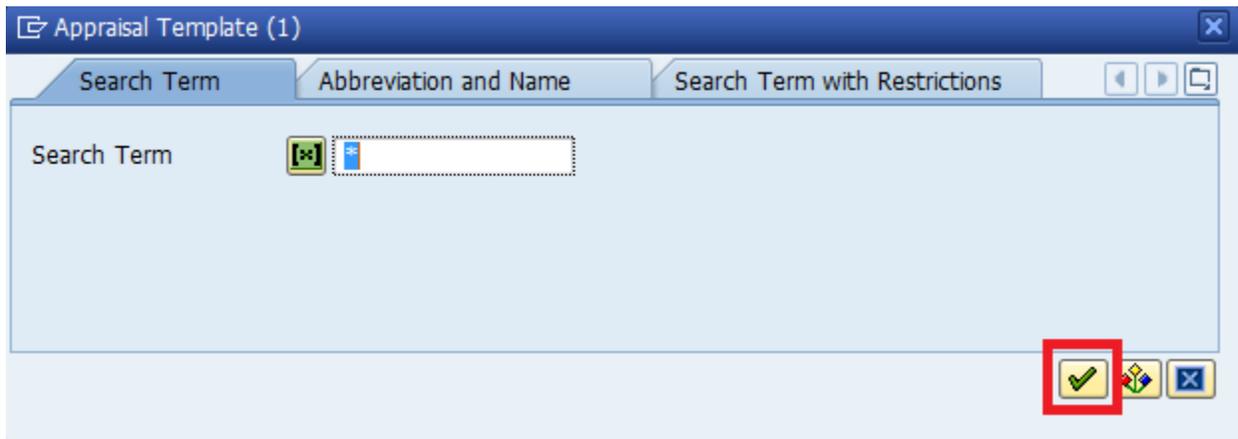
8. The "Create Relationships" processing screen comes up. Enter **A|608** in the Relationship type/relationship field here:

The screenshot shows the 'Create Relationships' form. At the top, there is a header with a yellow icon and the text 'Create Relationships'. Below the header, there are several fields: 'Course Type' with a dropdown menu set to 'ENGOOGLE' and the text 'Beyond Google II'; 'Planning Status' with a dropdown menu set to 'Planned'; and 'Valid from' with two date input fields set to '01/01/1900' and '12/31/9999', followed by a 'Change Information' button. Below these fields, there is a section for 'Relationships' with the text '01 D 50000044 2'. The 'Relationship type/relationship' field is highlighted with a red box and contains the text 'A | 608 | Has appraisal template'. Below this, there is a 'Related Object' section with a dropdown menu for 'Type of related object', and input fields for 'ID of related object', 'Abbreviation', and 'Name'. At the bottom, there is a 'Priority' field with a checkbox.

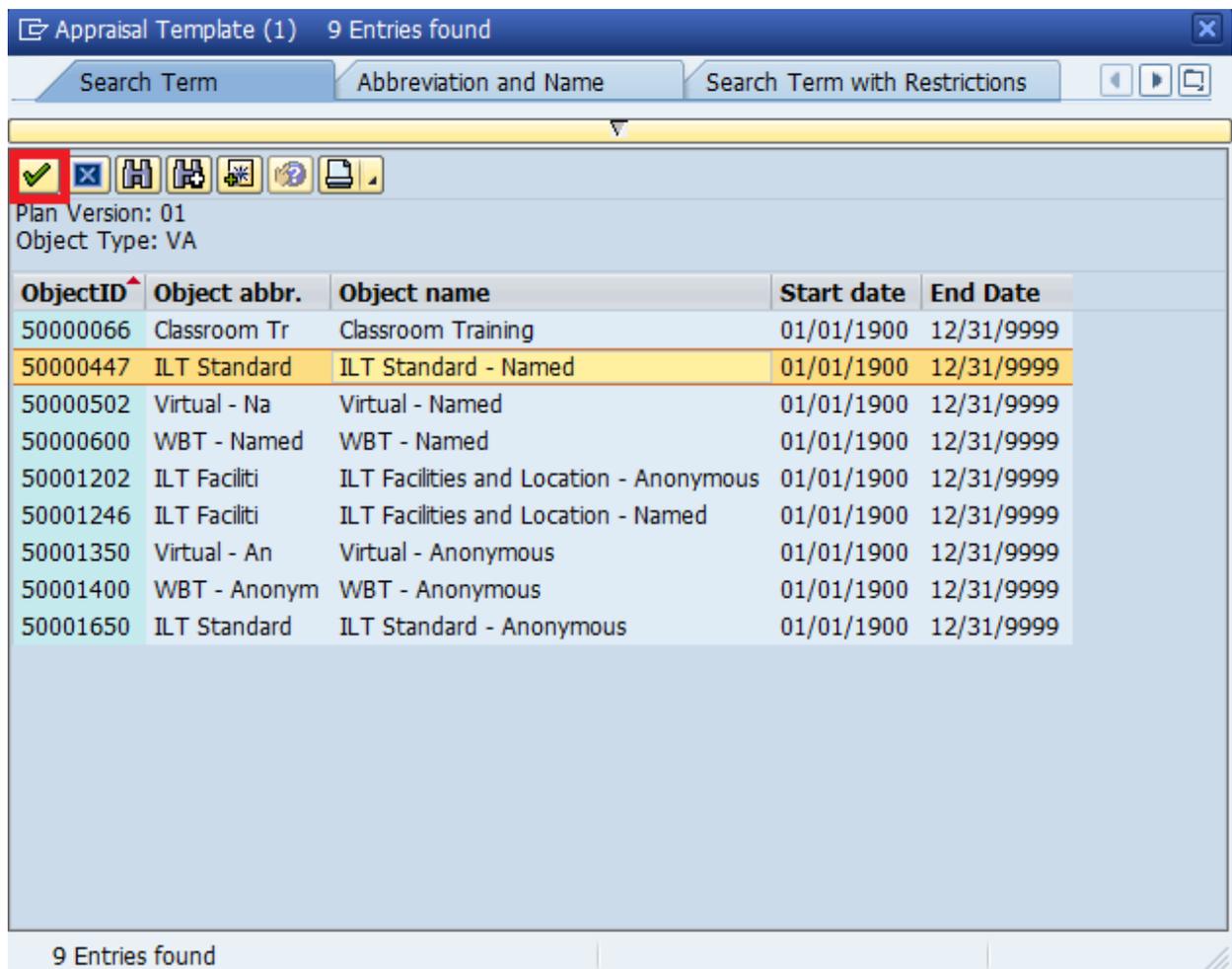
9. Select 'Appraisal Template' from the drop down menu in the Type of related object field.

The screenshot shows the 'Create Relationships' form, similar to the previous one. The 'Relationship type/relationship' field now contains 'A | 608 | Has appraisal template'. The 'Related Object' section is highlighted with a red box, and the 'Type of related object' dropdown menu is set to 'Appraisal Template'. The other fields, including 'ID of related object', 'Abbreviation', 'Name', and 'Priority', remain empty.

- Click in the 'ID of Related Object' field in order to select the type of appraisal you would like. For the next pop-up box that comes up, just click the green checkmark to see them all:



- Select the desired appraisal.



12. Save.

The screenshot shows a software interface with a menu bar (Infotype, Edit, Goto, Extras, View, System, Help) and a toolbar. The 'Save' icon (floppy disk) is highlighted with a red box. Below the toolbar is a section titled 'Create Relationships' with a sub-section 'Allowed relationships'. The form contains the following fields:

Course Type	ENGOOGLE	Beyond Google II
Planning Status	Planned	
Valid from	01/01/1900	to 12/31/9999

Relationships 01 D 5000044 2

Relationship type/relationship	A 608	Has appraisal template
--------------------------------	-------	------------------------

Related Object

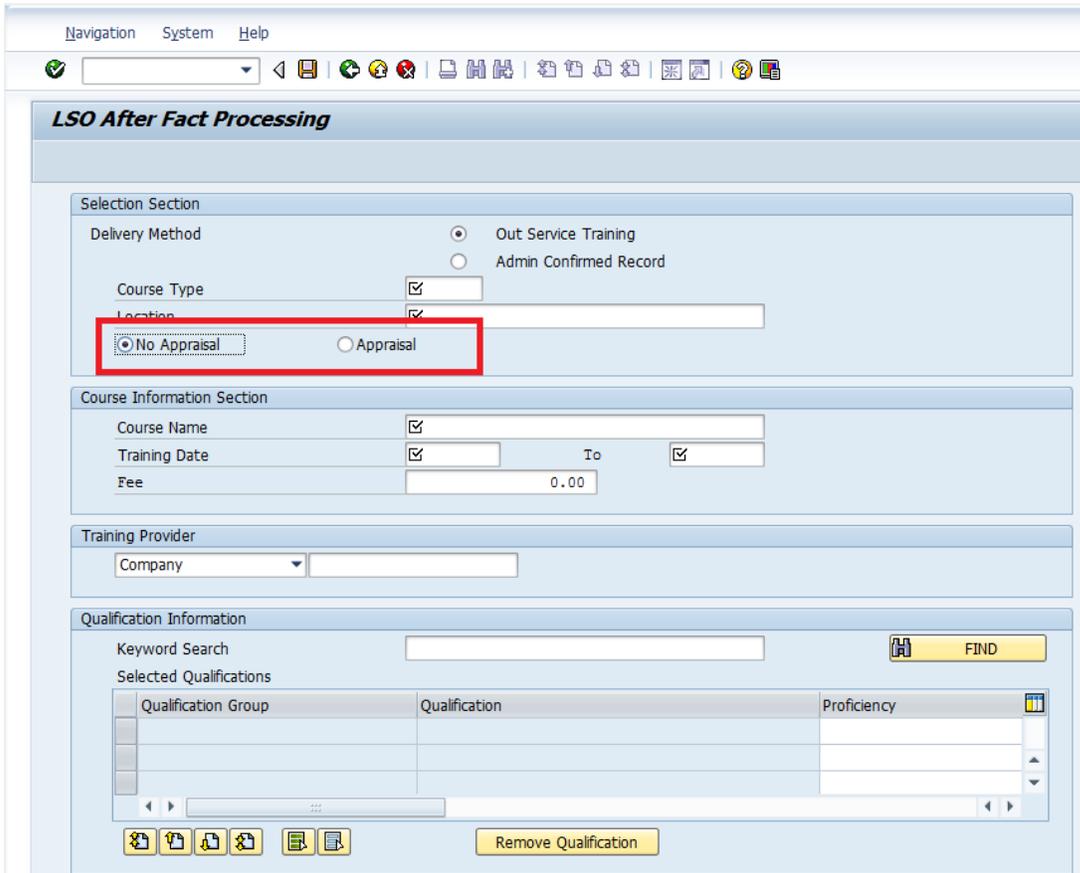
Type of related object	Appraisal Template
ID of related object	50000447
Abbreviation	
Name	

Priority

13. Upon course follow-up, the selected appraisal will now be sent to your learners. You can access appraisal reports from the LSO Training Administrator menu here:



14. Adding an appraisal to an ATF is simply a matter of clicking a radio button for the appraisal when you are in the ATF processing screen. Everything else about the appraisal and reporting on it is the same:



## **Activity**

Check mark each task after completing.

- Create a Course Type named "LSO T3 Test Course (Initials)"  
Example: LSO T3 Test Course ML  
Make sure you set the relationship to the subfolder you created during the last activity.
- Locate the Course Type you just created and make changes to the Description field.
- Save your changes.

---

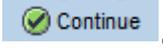
## Module 5: Creating/Canceling Courses

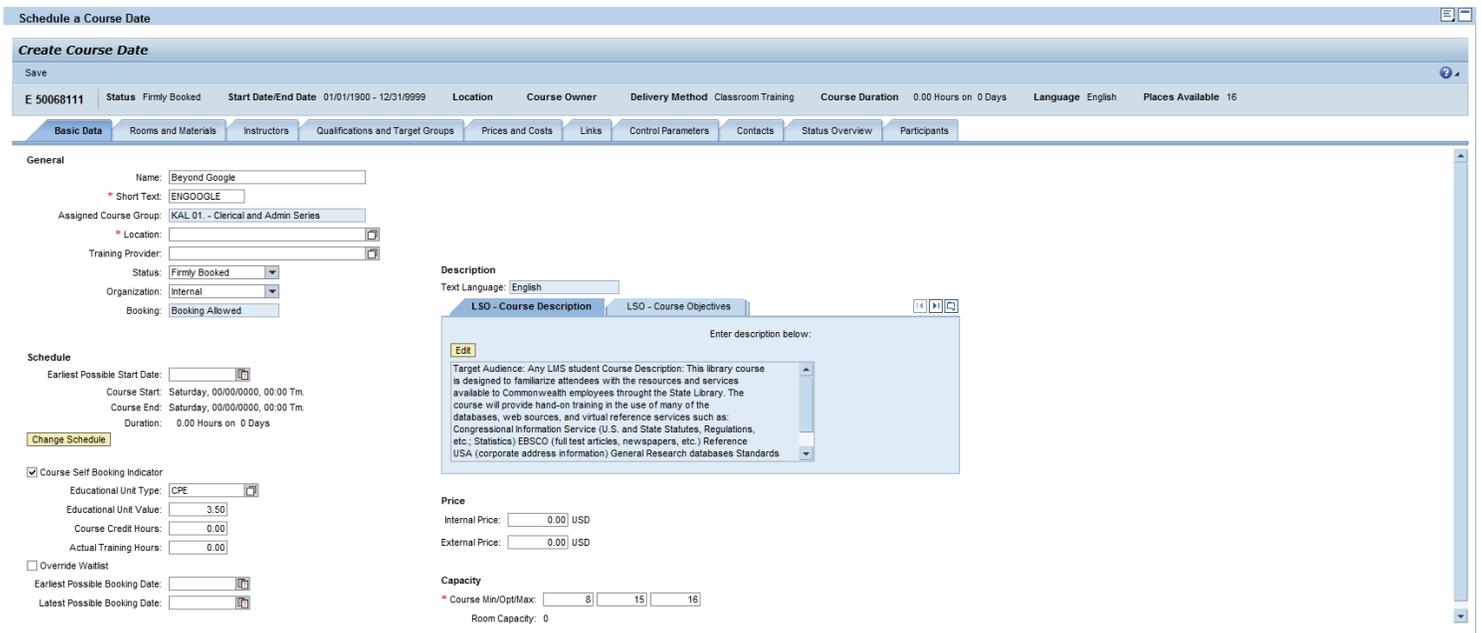
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### LSO Courses=Scheduled Offerings

Courses in LSO are the actual training sessions you will offer. They have a date, time and location, and may have additional resources assigned to them.

### Creating a Course

1. Click the Training Administrator link.
2. Click the Courses link.
3. Click the Course link.
4. Click the Schedule a Course Date link.  
"Create Course Date" screen appears.
5. Click the black arrow ▸ left of your agency Course Group.  
Agency Course Groups (subfolders) appear.
6. Continue to "drill down" in the catalog until the Delivery Method displays.
7. Click the box  left of the Course Type name.  
The Course Type row is highlighted.
8. Click the "Continue" button .  
The "Schedule a Course Date-Create Course Date" screen appears.



All of the information included in the Course Type transfers to the course. You can change this information at the course level, if necessary.

The "Schedule a Course Date-Create Course Date" screen contains 10 tabs. Let's review what is included in each tab and some of the more important fields in each.

Note: A red asterisk indicates a required field.

## **Basic Data**

The Basic Data tab has five sections:

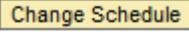
**General**-Includes the course name, short name and assigned Course Group.  
Important fields:

Location-This is where you actually choose the location to hold the class. It is the building/address, not the room at this point. You can click the icon in the Location field to search.

Note: The search criteria should be without vowels and double consonants and between asterisks. Ex: Harrisburg = \*HRSBRG\*

Status-Defaults to the booking option you chose at the Course Type level. You can change for this specific session by using the drop-down.

Note: Always leave as "Firmly Booked". Never change to "Planned".

**Schedule**-Defaults to today's date as start date and adopts schedule entered at Course Type level. You can enter new information by clicking the "Change Schedule" button .

Note: Scheduling the course date through LSO does not book the room in Outlook. That must be done separately.

- You can also check/uncheck the Course Self-Booking Indicator box and add/edit training hours.
- You can edit the Educational Unit Type, Educational Unit Value, Course Credit Hours and the Actual Training Hours fields.
- You can turn the waitlist off by checking the Override Waitlist checkbox.
- LSO Administrators have the option of setting Earliest/Latest Possible Booking Dates at the course level for courses that can be self-booked. Example: For a course scheduled on 04/18/2013, the Administrator sets the Earliest/Latest Possible Booking Dates from 03/18/2013 to 04/11/2013. This has two impacts:
  - Learners can only self-book from 03/18/2013 to 04/11/2013.
  - If the course requires supervisor approval, it must be approved by 10 pm on 04/11/2013. If the course is not approved by 10 pm on the latest possible booking date, the request will be rejected and the Learner will be removed from the roster. The Learner will also receive a notification "WF LSO BOOKING REJ" with the rejection code "Reason for Rejection:008 – No approval action taken."

Learners can view the Earliest/Latest Possible Booking Dates during the self-booking procedure in the Book section of the Course Description page.

The **Description, Price, and Capacity** sections contain the same information entered at the Course Type level. You can change the information here, if necessary.

**IMPORTANT:** Please make sure to click the “Save” button [Save](#) after completing all of the information in the basic data tab before moving to another tab.

### **Rooms and Materials**

If rooms are associated with the location, you can click the “Allocate Automatically” button [Allocate Automatically](#) to assign a specific room for the course. If they are not already associated with the location, you can click the “Add Temporary Room or Equipment” button [Add Temporary Room or Equipment](#) to assign a room.

### **Instructors**

Use this tab to assign an instructor to the course by selecting either the “Allocate Automatically” button [Allocate Automatically](#) or the “Add Temporary Instructor” button [Add Temporary Instructor](#).

Note: Searching by “Person” and using a personnel number is the most effective way to search for an instructor.

### **Qualifications and Target Groups**

Qualifications added at the Course Type level will appear here. You can add additional qualifications, if necessary.

### **Prices and Costs**

Prices added at the Course Type level will appear here. You can change the price and cost information for this specific course in this tab.

### **Links**

Any associated links added at the Course Type level will appear here. You can add additional links in this tab.

### **Control Parameters**

Contains a list of notifications that will be sent based on actions taken in this course.

Note: You can turn off notifications at the Course level via the Control Parameters tab by unchecking all of the boxes in the Automatic On column and selecting the “Save” button [Save](#). Notifications can also be turned off at a later date by using the following procedure:

1. Click the Training Administrator link.
2. Click the Courses link.
3. Click the Course link.
4. Click the Change Course link.

5. Drill down in the Course Catalog to locate the Course and click the box  left of the Course to highlight the row.
6. Click the "Continue" button .
7. Select the Control Parameters tab.
8. Uncheck all of the boxes in the Automatic On column.
9. Select the "Save" button .

### **Contacts**

Contacts added at the Course Type level will appear here. You can add additional contacts for this specific course in this tab.

### **Status Overview**

Shows the overall status of the course.

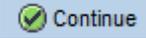
### **Participants**

This tab is updated when participants begin to book into the course.

After you have updated the information in the tabs, click the "Save" button . You will receive a confirmation message, "Course Created Successfully".

### **Changing Courses**

You can change/add information to existing courses by using the following procedure:

1. Click the Training Administrator link.
  2. Click the Courses link.
  3. Click the Course link.
  4. Click the Change Course link.  
"Change Course Date" screen appears.
  5. Search the course catalog to find the course.
  6. Click the course title link.
  7. Click the Continue button .
  8. Make necessary changes to the course.
  9. Click the Save button .
- You will receive a confirmation message, "Course Changed Successfully".

## Canceling Courses

NOTE: Please cancel individual participation before canceling the course.

Instructors will not receive a cancellation notice if a course is canceled. Please email instructors directly if a course is canceled.

1. Click the Training Administrator link.
2. Click the Courses link.
3. Click the Course link.
4. Click the Dynamic Course Menu link.  
"Dynamic Course Menu" screen appears.
5. Click through the course catalog to find the course.
6. Right click on the course you wish to cancel.  
A pop-up menu appears.
7. Click "Firmly Book/Cancel".  
"Firmly Book/Cancel Course" screen appears.

LSO > LSO > System Administrator > Courses > Course > Dynamic Course Menu

Course Edit Goto Extras Settings System Help

**Firmly Book/Cancel Course**

Data Screen

Course 50006228

Editing

Firmly book(optimum)

Firmly book(maximum)

Cancel event

Additional Data

Rebookings as of 02/04/2015

8. Select the "Cancel event" radio button.
9. Click the "Data Screen" button  Data Screen .  
Note: If participants are booked in the course, the "Rebook/Prebook" screen appears. If there are other future

courses scheduled, the participants will appear on the Rebook list. If there are no future courses scheduled, they will appear on the Prebook list. Click the "Save" icon  to rebook/prebook participants.

"Reason for Cancellation" pop-up window appears.

10. Search  and select a reason for cancellation.

11. Click the green checkmark .

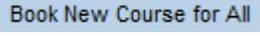
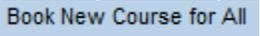
"Course was cancelled successfully" message appears.

### **Activity**

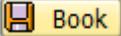
Check mark each task after completing.

- Create a course using the Course Type you created during the last activity.
- Cancel the course you just created.
- Create a new course associated with the same Course Type.



5. Click the right black arrow  to move participants from the "Available" section to the "Selected" section.
  6. Click the "Next" button .
  7. Click the "Book New Course for All" button .
  8. Search for the desired course.  
Note: You can search for the course using the Course Catalog or a Keyword Search.
  9. Select the desired course by clicking the box  left of the course title. The course row is highlighted.
  10. Click the "Next" button .
  11. Click the "Book" button .
- "Participation was successfully booked" message appears.  
Note: You can book additional courses for the same group of participants by clicking the "Book New Course for All" button .
12. Click the "Next" button  to confirm.

You can also book learners into a course using the Dynamic Participation Menu.

1. Click the Training Administrator link.
2. Click the Participation link.
3. Click the Dynamic Participation Menu link.  
"Dynamic Participation Menu" screen appears.
4. Search for the desired Course Date using the Course Catalog.
5. Right-click on the Course Date and select "Book".  
"Book Participation" screen appears.
6. Click the tab for the type of Participant to be booked.
7. Enter the Object ID in the appropriate field or click the "Search" icon to search.
8. Select the radio button next to the correct Booking Priority for the booking.
9. Click the "Book" button  to save and book the Participant.  
"Participant was booked" message appears.

You can also manage courses that already have booking activity by using the Manage Course Participation link. Another way to do this is through the LSO Overview screen, which we reviewed at the beginning of this course.

From the LSO Overview link, Worklist of Courses section, Active Queries subsection:

1. Click the appropriate timeframe link associated with "Courses".

2. Scroll to find the course that you would like to manage.
3. Click the box left  of the course name. The course row is highlighted.
4. Click the "Manage Participation" button **Manage Participation**. "Manage Course Participations" screen appears with Booked Participants tab information displayed.

LSO > LSO > System Administrator > Courses > Course > Manage Course Participation Full Screen | Options

**Manage Course Participations**

E 5000995 | Status: Firmly Booked | Start Date/End Date: 02/11/2015 - 02/11/2015 | Location: Hrsbrg: Finance Building | Course Owner: | Delivery Method: Classroom Training | Course Duration: 7.00 Hours on 1 Days | Language: English | Places Available: 14

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 (1) | Cancelled participants (0) | Prebookings (6) | Waitlist (0)

Type	Fee	Places	Booking Priority	Participant	Object ID	Organization	Supervisory Indicator	Classification
P	0.00	1	Normal Booking	Young, Aaron	00647005	LC Off of Dir Talent	<input checked="" type="checkbox"/>	Hr Anl 5 (Emp Trng)

There are four tabs available:

**Booked Participants**-Allows you to book participants or change participant statuses for learners.

**Cancelled Participants**-Allows you to change the participant statuses of learners who have previously canceled participation.

**Prebookings**-Allows you to prebook additional learners and change the participant statuses of learners who have previously prebooked.

**Waitlist**-Allows you to add learners to the waitlist or change the participant statuses of learners who are already on the waitlist.

### What is an Essential Booking?

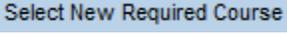
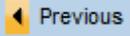
An Essential Booking is similar to what we refer to as a "Forced Enroll." Administrators have the option to perform an Essential Booking when the course has reached the optimum number of participants.

### What is a Mandatory Assignment?

A Mandatory Assignment is course assigned to an employee by a supervisor or training administrator. Please do not confuse these with "mandatory" trainings issued by the Office of Administration. You can assign these courses with a "To be taken by" date. Once assigned, these courses will appear in the employee's Messages and Notes section of the My Training Homepage. The employee is then responsible for actually booking the course.



The Course Type row is highlighted.

10. Click the "Next" button .
11. Enter the Start and End dates within the "Assign Validity Period" screen.  
Note: The End date represents the "To be taken by" date.
12. Click the "Assign" button .  
Participants appear in the Selected Name, Position or Org Unit fields.  
Note: You can assign another course to participants by clicking the "Select New Required Course" button  and repeating steps 8-13.
13. Click the "Next" button .  
"New Assigned Required Courses" screen appears.
14. Review for accuracy. If you need to make changes, click the "Previous" button .
15. Click the "Next" button .  
"The activity was completed successfully" message appears.

## **Activity**

Check mark each task after completing.

- Book participants into the course you created in the earlier activity.  
Example: LSO T3 Test Course ML
- Cancel participation for learners in the same course.
- Prebook participants into the same course.
- Locate your assigned training course and add participants to the waitlist.
- Assign a mandatory course to a learner.

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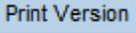
## Module 7: Viewing/Printing Course Rosters

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You can view and print sign-in rosters for your agency courses.

If you would like detailed information about attendees, the Student Information Roster may suit your needs.

To view/print/export the Student Information Roster:

1. Click the LSO Reporter link.
2. Click the Participation link.
3. Click the Student Information Roster link.
4. Search for the course in the 'Search Term' field. In searching for the course title, you can use asterisks \* as a "wild card" search around a key word within the course title. Then click the "Search" button . Example: \*Speaking\* for the course title, Speaking with Confidence.
5. Select the course by clicking in the 'Select' checkbox to place a checkmark by the appropriate Course. Click the "Ok" button .
6. Click the "Get Participants" button .
7. Click the "Print Version" button  to obtain a PDF printable version of the roster.

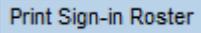
OR

Click the "Export" button  to export to Microsoft Excel.

Note: You must manually clear the Object ID field to search for another course.

You can also print a simple sign-in roster for a course. A convenient way to do this is through the LSO Overview screen, which we reviewed during the last module.

From the LSO Overview link, Worklist of Courses section, Active Queries subsection:

1. Click the appropriate timeframe link associated with "Courses".
2. Scroll to find the course.
3. Click the box  left of the course name.  
The course row is highlighted.
4. Click the "Print Sign-in Roster" button .  
The sign-in roster appears in a separate window.

5. Hover your cursor over the roster or select the F8 key on your keyboard.

Adobe task bar appears.

6. Click the "Printer" icon .

### **Activity**

Check mark each task after completing.

- Locate the course you created earlier.  
Example: LSO T3 Test Course ML
- View the Student Information Roster for your course.
- Locate the "Print Version" button. **DO NOT ACTUALLY PRINT.**
- Export the roster to Excel.

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## Module 8: Following Up Courses

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Administrators can give credit for completing courses, also known as course follow up.

Use the following procedure to follow up courses using the Worklist of Courses section. You can also go directly to the Manage Course Follow-Up link to search for and follow up courses.

From the LSO Overview link, Worklist of Courses section, Active Queries subsection:

1. Click the appropriate timeframe link in the Course Follow-Up section.
2. Scroll to find the course that you would like to manage.
3. Click the box  left of the course name.  
The course row is highlighted.
4. Click the "Follow-Up" button .  
"Course Follow-Up" screen appears.

**Course Follow-Up: Step 2 (Confirm Attendance)**

◀ Previous   Next ▶

1 Select Course   2 Confirm Attendance   3 Evaluate Participants   4 Transfer Qualification   5 Review and Save

Selected Course Professional Presence

Select the attendance of the participants

Participants				
☰	Type	Object ID	Participant	Attendance
<input type="checkbox"/>	P	00507115	Karen C Shan...	Present
<input type="checkbox"/>	P	00104770	David Kneal	Present
<input type="checkbox"/>	P	00437171	Monica M Cap...	Present
<input type="checkbox"/>	P	00607284	Carol D Runk	Present
<input type="checkbox"/>	P	00608010	Ashlee E. Heis...	Present

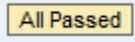
5. Select the attendance of participants by selecting "Present" or "Absent" in the Attendance column.

Note: If everyone attended, click the "All Present" button  at the bottom of the page.

Do not select the drop down option "Unconfirmed."

6. Click the "Next" button .
7. Evaluate participants by selecting "Course Passed" or "Course Failed" in the Participant Assessment column.

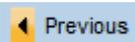
Note:

- If everyone passed, click the "All Passed" button  at the bottom of the screen.
- Do not select the drop down option "Not Rated".
- If "Course Failed" is selected, select a Reason For Not Passing from the drop down option. If you mark someone as "Failed" during course follow up, the Course will appear in the Learner's Completed Courses section, with no indication the course has been failed; however, the course will not appear on the Learner's transcript.
- If appropriate, you can manually enter a numeric grade in the Grade column.

8. Click the "Next" button .
9. Assign a proficiency level to assigned qualifications, if necessary.
10. Click the "Next" button .
11. Check the "Flag course as followed-up when saving data" box

Flag course as followed-up when saving data

12. Review information.

If the information is inaccurate, click the "Previous" button  to make necessary corrections.

13. Click the "Next" button .

"Your course follow-up was saved" message appears.

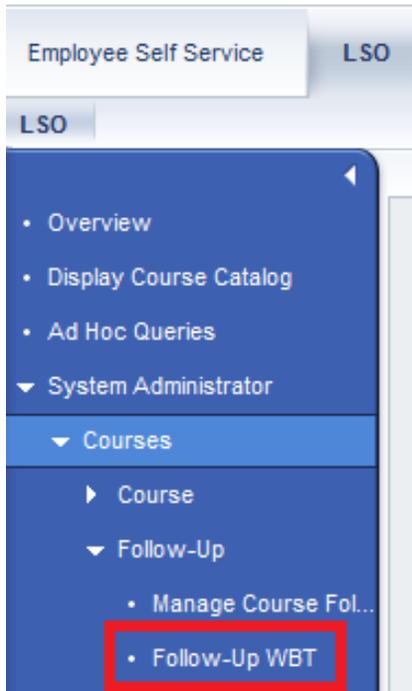
Note: If you would like to confirm that the course was actually followed up, click the Refresh link  in the lower right corner of the Worklist of Courses, Course Follow-up section and scroll to the far right. A checkmark should appear in the Course Followed Up column.

## Follow Up WBT Tool

A tool has been created in LSO to allow Training Administrators to manually follow-up a web based training (WBT) for a learner that needs to be granted credit for completing the WBT.

You can use this tool for learners who complete the accessible version of the course and need to be credited for their completion. You can also use this tool for employees who viewed a CD version of the course and did not complete it in LSO.

1. Find the "Follow-Up WBT" transaction in your Training Administrator menu here:

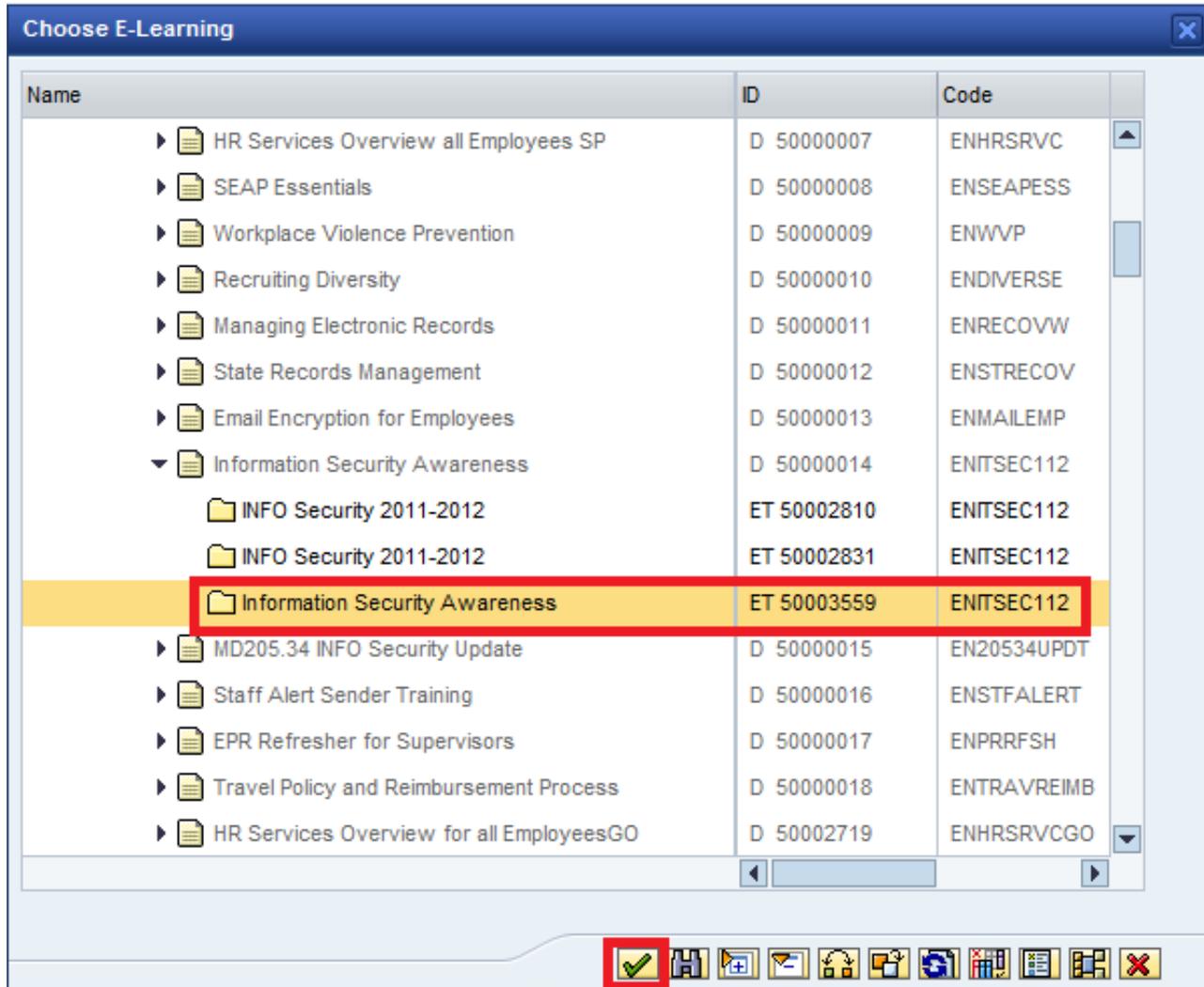


2. After selecting the transaction, you will be presented with the following screen:

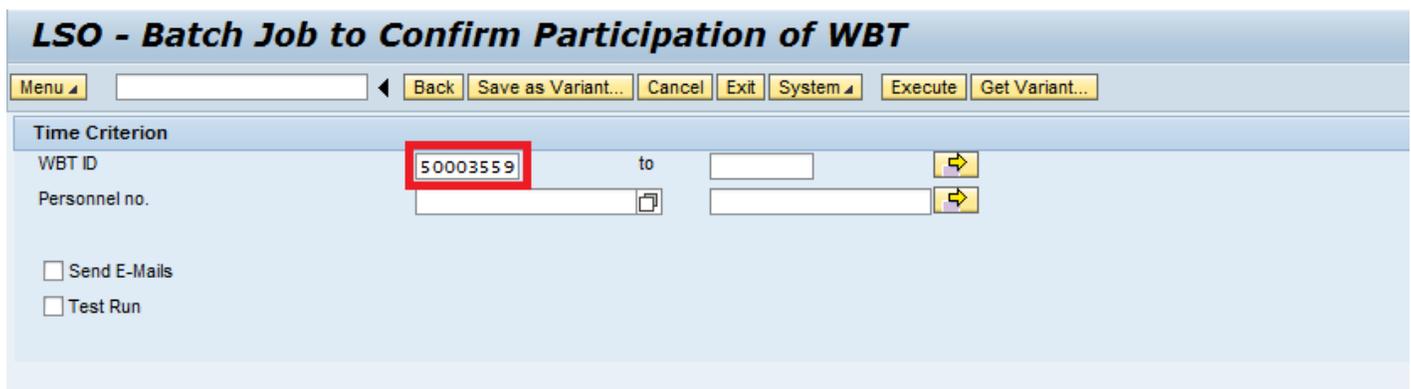
A screenshot of the LSO - Batch Job to Confirm Participation of WBT screen. The breadcrumb trail at the top reads: "LSO > LSO > System Administrator > Courses > Follow-Up > Follow-Up WBT". The main title is "LSO - Batch Job to Confirm Participation of WBT". Below the title is a menu bar with buttons: "Menu", "Back", "Save as Variant...", "Cancel", "Exit", "System", "Execute", and "Get Variant...". The "Time Criterion" section contains two rows of input fields: "WBT ID" and "Personnel no.". Each row has a text input field, a "to" label, another text input field, and a yellow arrow button. Below this section are two checkboxes: "Send E-Mails" and "Test Run".



5. Navigate to the Course Package (ET) that you want to grant completion credit for, select it, and then click the green check mark below:



6. Your object ID for the WBT is now transferred to the processing screen:



- Next, select the "Personnel no." box to input your employee. If you know their personnel number, you can type it directly in the box. If not, select the small pop-out box to the right of the input field.

**LSO - Batch Job to Confirm Participation of WBT**

Menu ◿ ◀ Back Save as Variant... Cancel Exit System ◿ Execute Get Variant...

Time Criterion

WBT ID 50003559 to

Personnel no. □

Send E-Mails

Test Run

- In the next screen, find your employee by inputting their Personnel area, last name and first name (if needed), then click the binoculars icon below to find them:

**ID of Related Object (1)**

Restrictions

Personnel area 81

Personnel subarea

Employee group

Employee subgroup

Payroll area

Company Code

Cost Center

Organizational unit

Organizational key

Administrator group

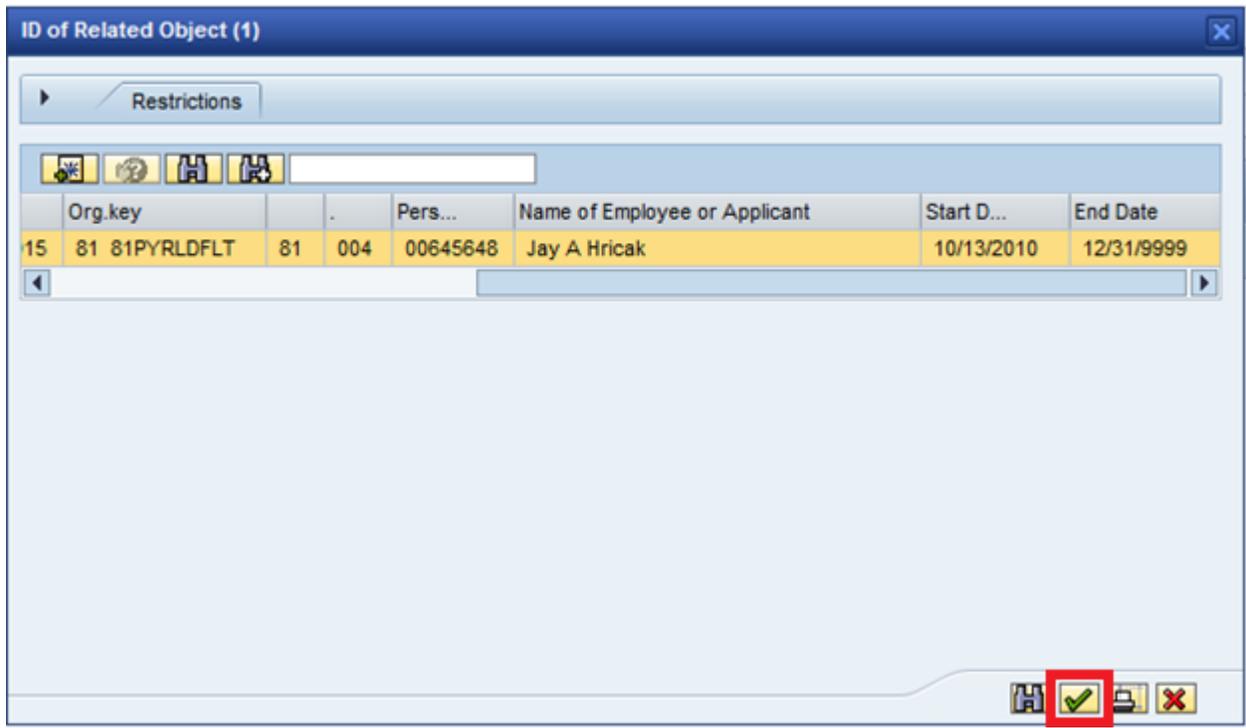
Time administrator

Last name hricak

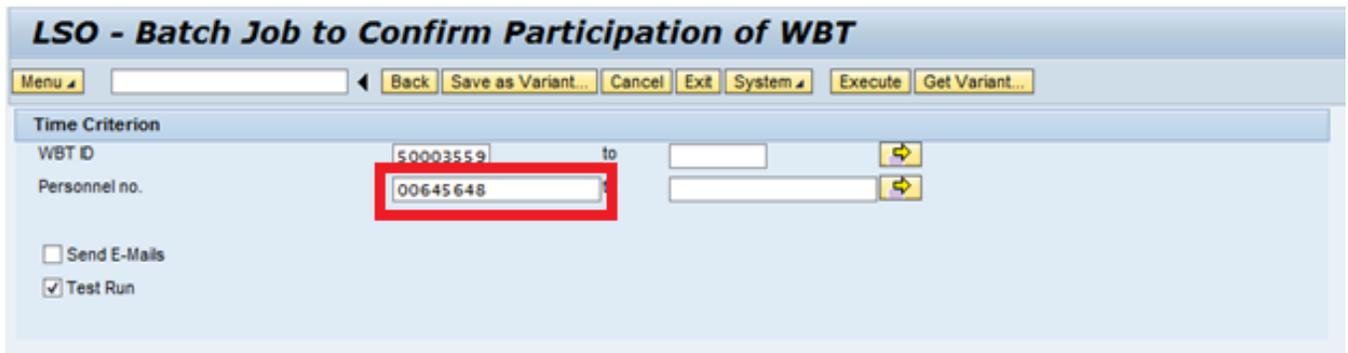
First name

🔍 ✕

9. When your employee is found, the results screen will come up. Select your employee and click the green check mark below:



10. Your employees' personnel number is now transferred to the processing screen:



- You are now ready to run the transaction. You will first perform a "Test Run" to ensure you have selected the correct WBT course package (ET). After you check the "Test Run" box, select the "Execute" button:

**LSO - Batch Job to Confirm Participation of WBT**

Menu ▾ [ ] ◀ Back Save as Variant... Cancel Exit System ▾ **Execute** Get Variant...

**Time Criterion**

WBT ID: 50003559 to [ ] ⇄

Personnel no.: 00645648 to [ ] ⇄

Send E-Mails

**Test Run**

- After the transaction runs, you will be presented with a screen showing the results of your follow-up test run. To see this portion of the post-processing screen, you will want to scroll all the way to the bottom of the page and look for the below line that says "Total Number of Participant Records for Confirmation". If you selected one employee to follow-up, this number should be "1" if it is "0" or any of the error fields have numbers in them, you have selected the wrong course package (ET):

**LSO - Batch Job to Confirm Participation of WBT**

Menu ▾ [ ] ◀ Back Cancel Exit System ▾

Program: ZH\_LSO\_WBTPARTI\_CONFIRM  
User : P00645648

Commonwealth of Pennsylvania  
Human Resources Planning  
LSO - Batch Job to Confirm Participation of WBT

---

Program: ZH\_LSO\_WBTPARTI\_CONFIRM  
User : P00645648

Commonwealth of Pennsylvania  
Human Resources Planning  
LSO - Batch Job to Confirm Participation of WBT  
Control Report

Number of IT1001 A614 Records Read	:	1
Number of IT1001 A020 Records Read	:	1
Total Number of Participant Records Read	:	1
Total Number of Participant Records Read/Successfully Confirmed	:	0
<b>Total Number of Participant Records for Confirmation</b>	<b>:</b>	<b>1</b>
Total Number of A614 Records not found	:	0
Total Number of A020 Records not found	:	0
Total Number of Records not Confirmed	:	0
Total Number of Revoke Access Authorizations	:	0
Total errors during Revoke Access Authorization	:	0
Total Error Records	:	0

13. If the test run was successful, use the "Back" button here to get back to your main processing screen:

**LSO - Batch Job to Confirm Participation of WBT**

Menu ▾ |  | **Back** Cancel Exit System ▾

---

Program: ZH\_LSO\_WBTPARTI\_CONFIRM Commo  
User : P00645648 Hum  
LSO - Batch Jo

---

Selected WBT : 50003559  
Selected Pernr : 00645648  
Previous Run Date : 01/01/1900  
Current Run Date : 07/18/2014  
Send E-Mails : No  
Update TVARV : No  
Test Run : Yes  
Pass :  
Confirmation :  
Progress : 0.00

14. Now, uncheck "Test Run". If you also want the standard LSO WBT completion email to be sent to the learner, check the "Send Email" box as well. Then click "Execute".

**LSO - Batch Job to Confirm Participation of WBT**

Menu ▾ |  | Back Save as Variant... Cancel Exit System ▾ **Execute** Get Variant...

---

Time Criterion

WBT ID  to

Personnel no.  to

Send E-Mails  
 Test Run

15. After the transaction runs, you will again be presented with a screen showing the results of your follow-up. To see this portion of the post-processing screen, you will want to scroll all the way to the bottom of the page and look for the below line that says "Total Number of Participant Records for Confirmation". If you selected one employee to follow-up, this number should be "1". Additionally the line that says "Total Number of Revoke Access Authorizations" should also be "1" (again, if you are only processing one employee).:

Program: ZH_LSO_WBTPARTI_CONFIRM		Commonwealth of Pennsylvania	
User : P00645648		Human Resources Planning	
		LSO - Batch Job to Confirm Participation of WBT	
		Control Report	
Number of IT1001 A614 Records Read	:		1
Number of IT1001 A020 Records Read	:		1
Total Number of Participant Records Read	:		1
Total Number of Participant Records Previously Confirmed	:		0
<b>Total Number of Participant Records for Confirmation</b>	<b>:</b>	<b></b>	<b>1</b>
Total Number of Participant Records Confirmed	:		1
Total Number of A614 Records not found	:		0
Total Number of A020 Records not found	:		0
Total Number of Records not Confirmed	:		0
<b>Total Number of Revoke Access Authorizations</b>	<b>:</b>	<b></b>	<b>1</b>
Total Errors during Revoke Access Authorization	:		0
Total Error Records	:		0

**Notes:**

- The employees’ transcript will update with the completed course information immediately.
- The employee will still be able to access the WBT till the next business day from running this transaction. Accessing the WBT will not reset their progress or change anything you have done here.
- Completions reports will show the employee as 0% complete for the WBT, but the "Followed Up" column on the report will show that the course has been followed up for them, hence they are considered complete.
- If you run the WBT Follow-Up tool for a learner on the same day you booked that learner into the WBT, the tool will generate an error, however you can ignore this error, as the WBT will be written to their transcript, the completion email will be sent (if you selected that option), and their access to the WBT will be revoked as normal.

## Unfollow Up a Course that has Already Been Followed Up

You can unfollow up a course in order to add or remove participants:

1. Go to the Dynamic Course Menu.



2. Find the followed up course that you want to add participants to, remove participants from. Right click the course and select 'Follow up' from the menu.



- Click the "next arrow" till you get to the "Follow Up Course" Screen (you will click this button below twice).

**Follow Up Participation**


 Training Evaluation
  Procedure
  To Save

Course: Beyond Google  
 Start date: 06/07/2012    End Date: 06/07/2012  
 Delivery Method: Classroom Training    Followed Up

















Follow Up Participation

Transfer	Grade	Edu. Unit Type	Edu. U ...	Ac. Tr. Hr	C Cr. Hrs.	Attendee Name
<input checked="" type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Christine S Morgan
<input checked="" type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Gerald M Morgan
<input checked="" type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Gina M Morgan
<input checked="" type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Hope R Morgan
<input checked="" type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	James P Morgan

- You are now at the "Follow up Course" screen.

**Follow Up Course**



 To Save

Course: Beyond Google  
 Start date: 06/07/2012    End Date: 06/07/2012  
 Delivery Method: Classroom Training    Followed Up

















Follow Up Courses

Transfer	Start date	End date	Course Name	F	Hist.
<input checked="" type="checkbox"/>	06/07/2012	06/07/2012	Beyond Google	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Uncheck the "F" box here. This will remove the follow up for your course and place it back into a 'Firmly Booked' status. NOTE: Make sure the 'Transfer' box to the left is still checked.

**Follow Up Course**



 To Save

Course          Beyond Google  
 Start date          06/07/2012      End Date          06/07/2012  
 Delivery Method          Classroom Training Followed Up















Follow Up Courses

Transf...	Start date	End date	Course Name	F	Hist.
<input checked="" type="checkbox"/>	06/07/2012	06/07/2012	Beyond Google	<input type="checkbox"/>	<input type="checkbox"/>

- Now, click the "To Save" button at the top of the screen.

**Follow Up Course**



 To Save

Course          Beyond Google  
 Start date          06/07/2012      End Date          06/07/2012  
 Delivery Method          Classroom Training Followed Up















Follow Up Courses

Transf...	Start date	End date	Course Name	F	Hist.
<input checked="" type="checkbox"/>	06/07/2012	06/07/2012	Beyond Google	<input type="checkbox"/>	<input type="checkbox"/>

- This will take you to the final "Save" screen to undo the follow up. Click the 'Save' icon here.

The screenshot shows a software interface with a menu bar (Follow-Up, Edit, Goto, System, Help) and a toolbar. The 'Save' icon (floppy disk) is highlighted with a red box. Below the toolbar, the 'Save Follow-Up' screen displays the following information:

**Course**: Beyond Google  
**Start date**: 06/07/2012    **End Date**: 06/07/2012  
**Delivery Method**: Classroom Training    Followed Up

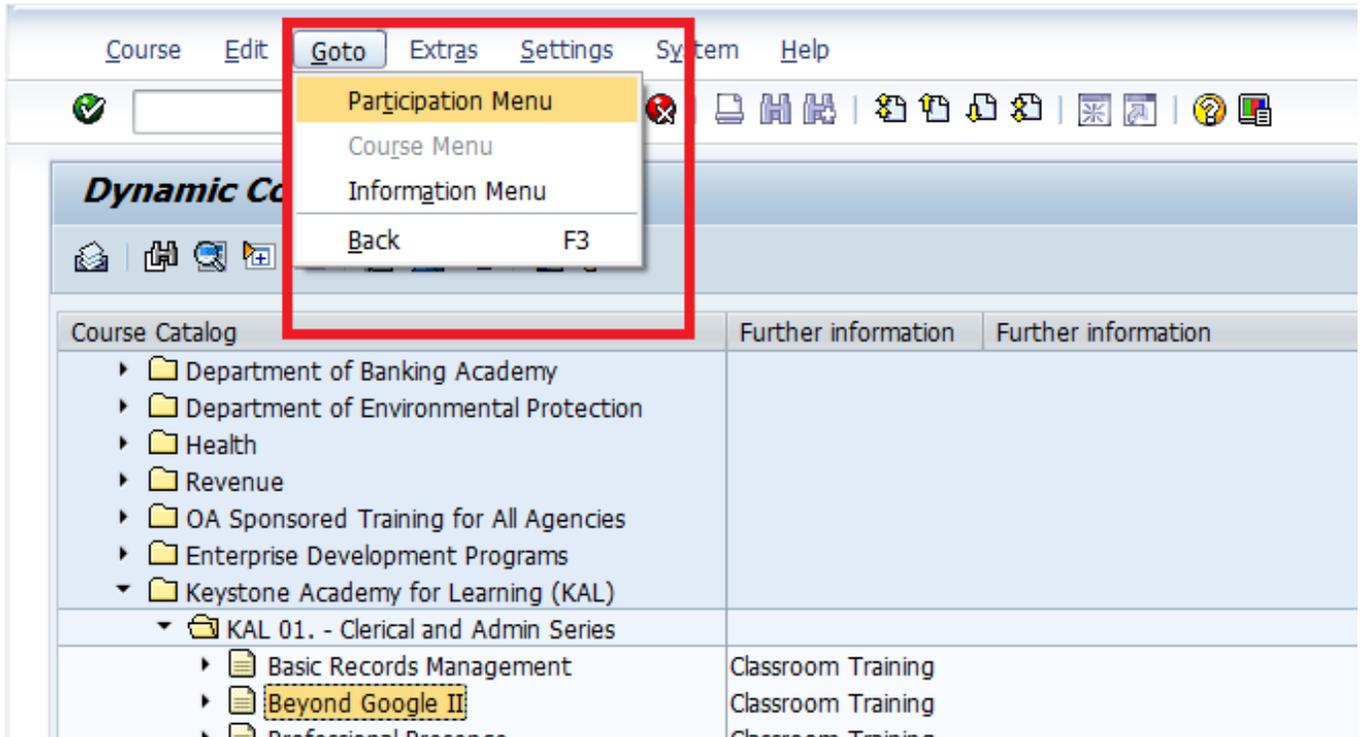
Below this information is a toolbar with various icons, including a 'Back Arrow' icon. Underneath is a table titled 'Follow Up Participation'.

Grade	Edu. Unit Type	Edu. U ...	Ac. Tr. Hr	C Cr. Hrs.	Grade	Attendee Name
0.00	CPE	4.50	0.00	0.00	0.00	Christine S Morgan
0.00	CPE	4.50	0.00	0.00	0.00	Gerald M Morgan
0.00	CPE	4.50	0.00	0.00	0.00	Gina M Morgan
0.00	CPE	4.50	0.00	0.00	0.00	Hope R Morgan
0.00	CPE	4.50	0.00	0.00	0.00	James P Morgan
0.00	CPE	4.50	0.00	0.00	0.00	Marcy A Morgan

- After saving, use the "Back Arrow" here to back your way out of the follow up processing till you are back at the dynamic course menu. You will click this back arrow five times to get all the way out.



11. To add or remove participants, we need to switch to the 'Dynamic Participation Menu'. Navigate to the "Goto" menu above and select "Participation Menu".



12. To add participants to the course, right click the actual course session and select "Book" from the menu.

KAL 01. - Clerical and Admin Series		
Basic Records Management		Classroom Training
Beyond Google II		Classroom Training
05/01/2012 - 05/01/2012 EN:ENG	Firmly Booked Inter...	9 Avail
05/15/2012 - 05/15/2012 EN:ENG	Firmly Booked Inter...	6 Avail
06/07/2012 - 06/07/2012 EN:ENG	Followed Up Intern...	3 Avail
06/20/2012 - 06/20/2012 EN:ENG	Firmly Booked Inter...	5 Avail
06/22/2012 - 06/22/2012 EN:ENG	Followed Up Intern...	5 Avail
07/04/2012 - 07/04/2012 EN:ENG	Followed Up Intern...	9 Avail
07/07/2012 - 07/07/2012 EN:ENG	Followed Up Intern...	6 Avail
07/15/2012 - 07/15/2012 EN:ENG	Course canceled Int...	16 Avail
07/30/2012 - 07/30/2012 EN:ENG	Course canceled Int...	16 Avail
08/22/2012 - 08/22/2012 EN:ENG	Followed Up Intern...	8 Avail
09/01/2012 - 09/01/2012 EN:ENG	Followed Up Intern...	8 Avail
09/10/2012 - 09/10/2012 EN:ENG	Followed Up Intern...	8 Avail
09/13/2012 - 09/13/2012 EN:ENG	Followed Up Intern...	9 Avail
10/01/2012 - 10/01/2012 EN:ENG	Followed Up Intern...	15 Avail
02/14/2013 - 02/14/2013 EN:ENG	Followed Up Intern...	7 Avail
03/27/2013 - 03/27/2013 EN:ENG	Followed Up Intern...	1 Avail
05/17/2013 - 05/17/2013 EN:ENG	Followed Up Intern...	8 Avail

- Book
- Book List
- Display
- Participant List
- Cancellations
- Collaboration
- Time Schedule
- Resources List
- Knowledge Link
- Web Link

13. You are presented with this processing screen. Simply enter the learners personnel number in the below field, or use the pop-out to search for them by first and last name. After finding them hit the "Enter" key on your keyboard and confirm you have the correct learner.

**Book Participation: Data**

Course Type: Beyond Google II

Person | Organizational unit | Contact person | Customer | External person

Person:  Jay A Hricak

Organizational unit:

Course Data	Start date	End date	Course	Avail	Bookd	WaitL	Opt.	Ext	FB	L...	Course Loc...
000P	06/20/2012	06/20/2012	ENGOOGLE	5	11	0	16	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EN	0310 - BFH

Booking Priority:  Normal booking  Essential Booking  Waiting list

Book | Book/Payment Info | To Be Rebooked | Prebooked

14. Click the "Book" button here.

The screenshot shows a software interface titled "Book Participation: Data". At the top, it displays "Course Type" as "Beyond Google II". Below this are several tabs: "Person", "Organizational unit", "Contact person", "Customer", and "External person". The "Person" tab is active, showing a text input field with "00645648" and the name "Jay A Hricak". Below that, the "Organizational unit" is set to "EX HR Dvpt DM".

Underneath is a "Course Data" table with the following columns: Start date, End date, Course, Avail, Bookd, WaitL, Opt., Ext, FB, L..., and Course Loc... The table contains one row of data: Start date: 06/20/2012, End date: 06/20/2012, Course: ENGOOGLE, Avail: 5, Bookd: 11, WaitL: 0, Opt.: 16, Ext: (checkbox), FB: (checked checkbox), L...: EN, Course Loc...: 0310 - BFH.

Below the table is a "Booking Priority" section with three radio buttons: "Normal booking" (selected), "Essential Booking", and "Waiting list".

At the bottom is a toolbar with several buttons. The "Book" button, which has a floppy disk icon, is highlighted with a red rectangular box. Other buttons include "Book/Payment Info", "To Be Rebooked", "Prebooked", and several utility icons.

15. Your learner is now booked for the course. Click the red 'X' here to close this screen.

This screenshot is identical to the one above, showing the same "Book Participation: Data" window. The "Book" button is no longer highlighted. Instead, the red 'X' button in the bottom right corner of the toolbar is highlighted with a red rectangular box, indicating the next step in the process.

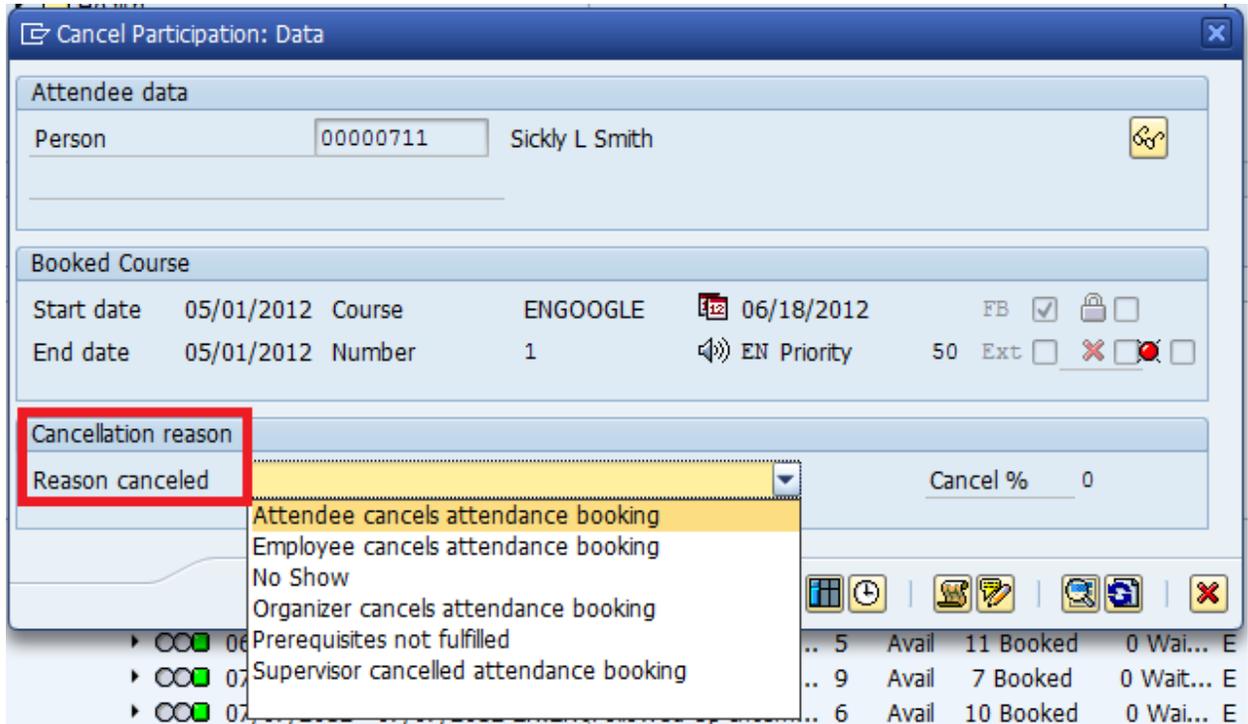
16. To remove participants, you will again work out of the Dynamic Participation Menu. First, we need to open the course up so we can see all the participants, and select the learner for cancellation. To do this, click the small arrow next to the session to expand the course.

Basic Records Management	Classroom Training
Beyond Google II	Classroom Training
05/01/2012 - 05/01/2012 EN:ENG	Firmly Booked Inter... 9 Avail 7 Booked 0 Wait...
<ul style="list-style-type: none"> <li>Sickly L. Smith</li> <li>Annette Ann Williams</li> <li>Gina R Williams</li> <li>Morrissa I Williams</li> <li>Saqueena V Williams</li> <li>Sonia M Williams</li> <li>Edberg Stefan</li> </ul>	<ul style="list-style-type: none"> <li>(50) 06/18/2012</li> <li>O 00111200 (50) 06/18/2012</li> <li>O 00210231 (50) 06/18/2012</li> <li>O 00134391 (50) 06/18/2012</li> <li>O 00087100 (50) 06/18/2012</li> <li>O 00210232 (50) 06/18/2012</li> <li>(50) 07/03/2013</li> </ul>
05/15/2012 - 05/15/2012 EN:ENG	Firmly Booked Inter... 6 Avail 10 Booked 0 Wai...
06/07/2012 - 06/07/2012 EN:ENG	Followed Up Intern... 3 Avail 13 Booked 0 Wai...
06/20/2012 - 06/20/2012 EN:ENG	Firmly Booked Inter... 4 Avail 12 Booked 0 Wai...
06/22/2012 - 06/22/2012 EN:ENG	Followed Up Intern... 5 Avail 11 Booked 0 Wai...
07/04/2012 - 07/04/2012 EN:ENG	Followed Up Intern... 9 Avail 7 Booked 0 Wait...

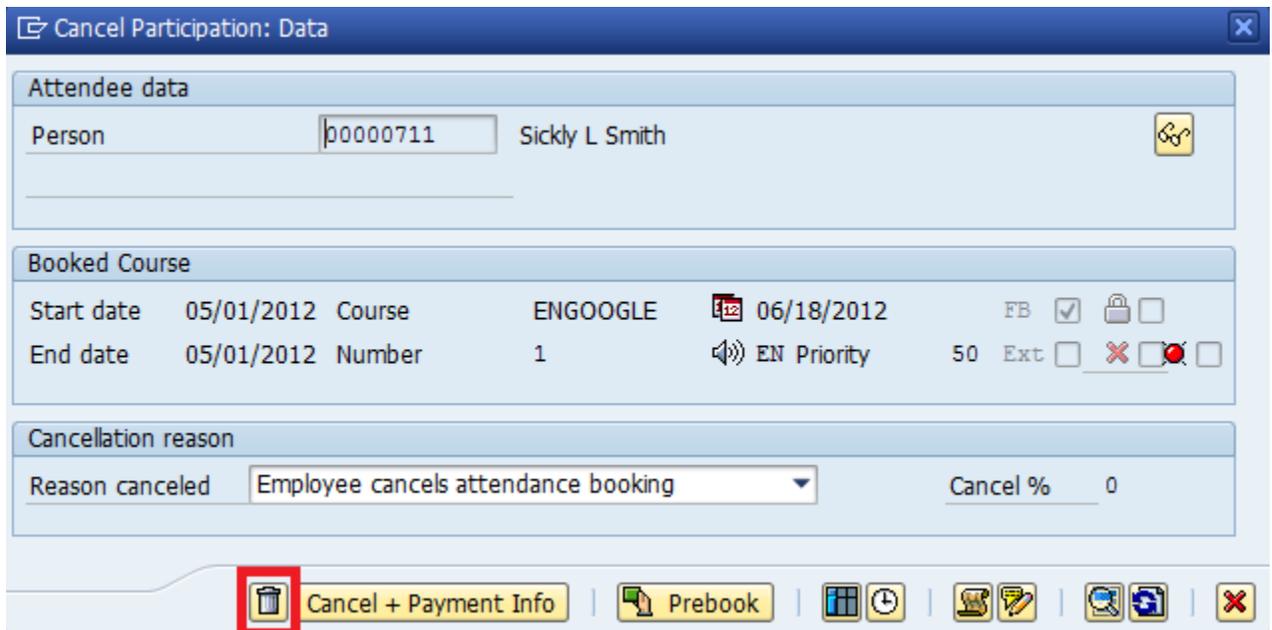
17. Right-click the learner you want to remove from the course and select 'Cancel' from the menu.

Basic Records Management	Classroom Training
Beyond Google II	Classroom Training
05/01/2012 - 05/01/2012 EN:ENG	Firmly Booked Inter... 9 Avail 7 Booked
<ul style="list-style-type: none"> <li>Sickly L. Smith</li> <li>Anne</li> <li>Gina</li> <li>Morri</li> <li>Saqu</li> <li>Sonia</li> <li>Edbe</li> </ul>	<ul style="list-style-type: none"> <li>(50) 06/18/2012</li> <li>O 00111200 (50) 06/18/2012</li> <li>O 00210231 (50) 06/18/2012</li> <li>O 00134391 (50) 06/18/2012</li> <li>O 00087100 (50) 06/18/2012</li> <li>O 00210232 (50) 06/18/2012</li> <li>(50) 07/03/2013</li> </ul>
05/15/2012 - 05/15/2012 EN:ENG	Firmly Booked Inter... 6 Avail 10 Booked
06/07/2012 - 06/07/2012 EN:ENG	Followed Up Intern... 3 Avail 13 Booked
06/20/2012 - 06/20/2012 EN:ENG	Firmly Booked Inter... 4 Avail 12 Booked
06/22/2012 - 06/22/2012 EN:ENG	Followed Up Intern... 5 Avail 11 Booked
07/04/2012 - 07/04/2012 EN:ENG	Followed Up Intern... 9 Avail 7 Booked
07/10/2012 - 07/10/2012 EN:ENG	Course canceled Int... 16 Avail 0 Booked
07/30/2012 - 07/30/2012 EN:ENG	Course canceled Int... 16 Avail 0 Booked
08/22/2012 - 08/22/2012 EN:ENG	Followed Up Intern... 8 Avail 8 Booked
09/01/2012 - 09/01/2012 EN:ENG	Followed Up Intern... 8 Avail 8 Booked

18. Select a 'Cancellation Reason' from the next screen.



19. Click the 'Trash Can' icon here to fully cancel them from the course.

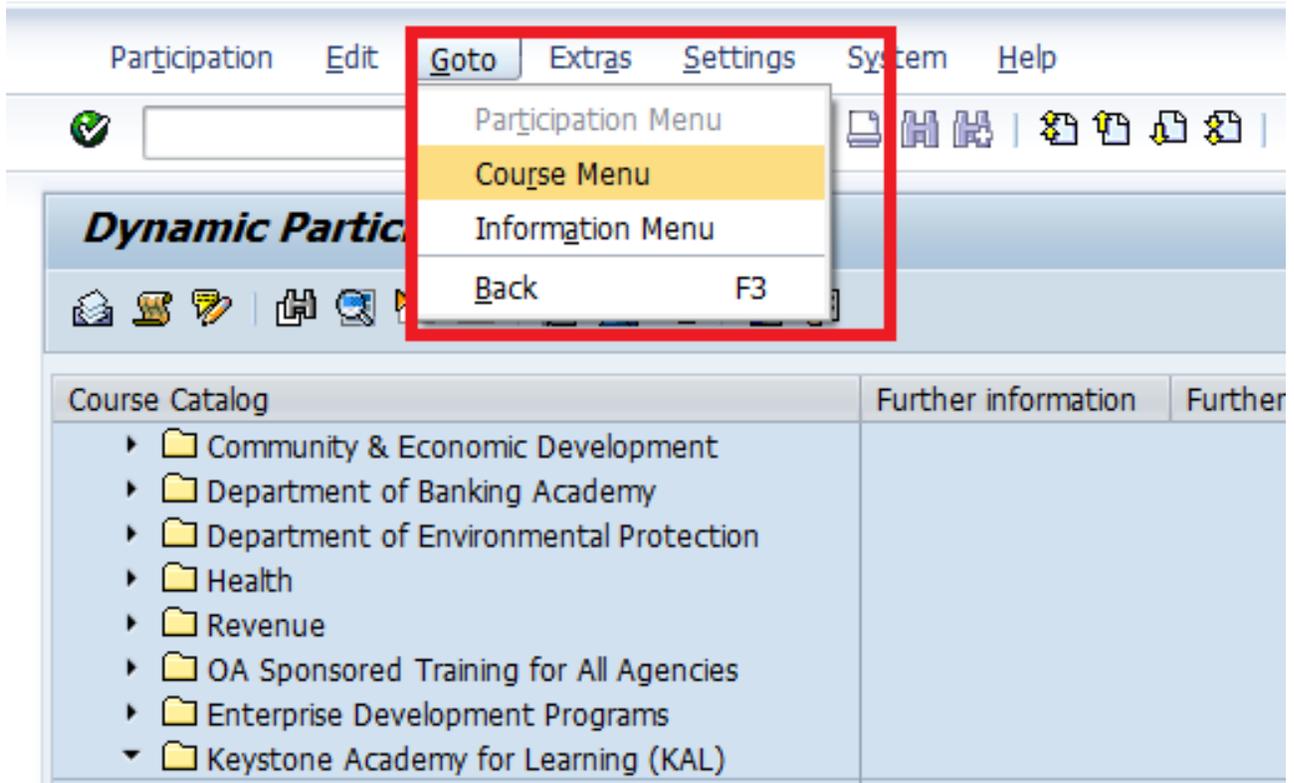


20. Click the Red 'X' to close this window.

21. You are taken back to the Dynamic Participation menu, and you can now see your employee is no longer in the list of course participants.

Basic Records Management	Classroom Training
Beyond Google II	Classroom Training
05/01/2012 - 05/01/2012 EN:ENG	Firmly Booked Inter... 10 Avail 6 Booked
• Annette Ann Williams	O 00111200 (50) 06/18/2012
• Gina R Williams	O 00210231 (50) 06/18/2012
• Morrissa I Williams	O 00134391 (50) 06/18/2012
• Saqueena V Williams	O 00087100 (50) 06/18/2012
• Sonia M Williams	O 00210232 (50) 06/18/2012
• Edberg Stefan	(50) 07/03/2013

22. Now, after adding or removing participants, we need to follow the course up once again. Use the "Goto" menu again to switch back to the 'Dynamic Course Menu.'



23. Once back at the Dynamic Course menu, right-click the course you have been working on and select "Follow Up."

**Dynamic Course Menu**

Course Catalog Further inform

- OA Sponsored Training for All Agencies
- Enterprise Development Programs
- Keystone Academy for Learning (KAL)
  - KAL 01. - Clerical and Admin Series
    - Basic Records Management Classroom Trai
    - Beyond Google II Classroom Trai
    - 05/01/2012 - 05/01/2012 EN:ENGOOGLE Firmly Booked
    - 05/15/2012 - 05/15/2012 EN:ENGOOGLE Firmly Booked
    - 06/07/2012 - 06/07/2012 EN:ENGOOGLE Firmly Booked
    - 06/20/2012 - 06/20/2012 E Followed Up Ir
    - 06/22/2012 - 06/22/2012 E Followed Up Ir
    - 07/04/2012 - 07/04/2012 E Followed Up Ir
    - 07/07/2012 - 07/07/2012 E Followed Up Ir
    - 07/15/2012 - 07/15/2012 E Course cancel
    - 07/30/2012 - 07/30/2012 E Course cancel
    - 08/22/2012 - 08/22/2012 E Followed Up Ir
    - 09/01/2012 - 09/01/2012 E Followed Up Ir
    - 09/10/2012 - 09/10/2012 E Followed Up Ir
    - 09/13/2012 - 09/13/2012 E Followed Up Ir
    - 10/01/2012 - 10/01/2012 E Followed Up Ir
    - 02/14/2013 - 02/14/2013 E Followed Up Ir
    - 03/27/2013 - 03/27/2013 EN:ENGOOGLE Followed Up Ir
    - 05/17/2013 - 05/17/2013 EN:ENGOOGLE Followed Up Ir

Context menu for 06/07/2012 - 06/07/2012 EN:ENGOOGLE:

- Change
- Display
- Firmly Book / Cancel
- Lock / Unlock
- Follow Up
- Participant List
- Time Schedule
- Resources List
- Knowledge Link
- Web Link

24. Click the data screen button again.

Course Edit Goto Extras Settings System Help

Follow Up Course

Data Screen

Course Classroom Training 50001910

25. You are now back to the follow up processing screen. Notice how the entries are not greyed out. If you added anyone to the course, you will now have to confirm their participation and mark them as passed.

**Follow Up Participation**

Training Evaluation Procedure To Save

Course: Beyond Google  
 Start date: 06/07/2012 End Date: 06/07/2012  
 Delivery Method: Classroom Training Firmly Booked

Follow Up Participation

Transfer	Grade	Edu. Unit Type	Edu. U ...	Ac. Tr. Hr	C Cr. Hrs.	Attendee Name	Confirmed	Pass	Reason	Re
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Christine S Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Gerald M Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Gina M Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Hope R Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	James P Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Marcy A Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Richard Duane Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Richard J Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Ronald E Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Shawn L. Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Shirley J Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	William J Morgan	X	X	0000	
<input type="checkbox"/>	0.00	CPE	4.50	0.00	0.00	Angelo Morgante	X	X	0000	

26. To do this, simply change their values in the "Confirmed" and "Pass" column to: "Confirmed" and "Pass", then check the "Transfer" box for their row at the far left, as well as the "Follow-Up" checkbox to the right.

**Follow Up Participation**

Training Evaluation Procedure To Save

Course: Beyond Google MOTHRA  
 Start date: 05/01/2012 End Date: 05/01/2012  
 Delivery Method: Classroom Training Firmly Booked

Follow Up Participation

Transfer	Grade	Edu. Unit Type	Edu. U ...	Ac. Tr. Hr	C Cr. Hrs.	Attendee Name	Confirmed	Pass	Reason	Reason for Course Failed	Follow-up
<input checked="" type="checkbox"/>	0.00		0.00	0.00	0.00	Jay A Hricak	X	X	0000		<input checked="" type="checkbox"/>
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Edberg Stefan	X	X	0000		<input checked="" type="checkbox"/>
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Annette Ann Williams	X	X	0000		<input checked="" type="checkbox"/>
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Gina R Williams	X	X	0000		<input checked="" type="checkbox"/>
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Morrissa I Williams	X	X	0000		<input checked="" type="checkbox"/>
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Saqueena V Williams	X	X	0000		<input checked="" type="checkbox"/>
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Sonia M Williams	X	X	0000		<input checked="" type="checkbox"/>

27. Click the "Next" button twice to get to the 'Follow up course' screen.

**Follow Up Participation**


 Training Evaluation
  Procedure
  To Save

Course: Beyond Google MOTHRA  
 Start date: 05/01/2012    End Date: 05/01/2012  
 Delivery Method: Classroom Training    Firmly Booked















Follow Up Participation

Transfer	Grade	Edu. Unit Type	Edu. U ...	Ac. Tr. Hr	C Cr. Hrs.	Attendee Name
<input checked="" type="checkbox"/>	0.00		0.00	0.00	0.00	Jay A Hricak
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Edberg Stefan
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Annette Ann Williams
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Gina R Williams
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Morrissa I Williams
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Saqueena V Williams
<input type="checkbox"/>	0.00		0.00	0.00	0.00	Sonia M Williams

28. Check the "F" box to once again follow up the course. **NOTE: NEVER under any circumstances check the "Hist." box. This will close out your course, convert it to a historical record, and hide it in the system.**

Follow-Up Edit Goto System Help

### Follow Up Course

To Save

Course Beyond Google  
 Start date 06/07/2012 End Date 06/07/2012  
 Delivery Method Classroom Training Firmly Booked

Follow Up Courses

Transf...	Start date	End date	Course Name	F	Hist.
<input checked="" type="checkbox"/>	06/07/2012	06/07/2012	Beyond Google	<input checked="" type="checkbox"/>	<input type="checkbox"/>

29. Click the "Next" arrow to get to the final processing screen.

### Follow Up Course

To Save

Course Beyond Google  
 Start date 06/07/2012 End Date 06/07/2012  
 Delivery Method Classroom Training Firmly Booked

Follow Up Courses

Transf...	Start date	End date	Course Name	F	Hist.
<input checked="" type="checkbox"/>	06/07/2012	06/07/2012	Beyond Google	<input checked="" type="checkbox"/>	<input type="checkbox"/>

30. Click the final "Save" icon here to follow up the course.

Follow-Up Edit Goto System Help










### Save Follow-Up

Start date 06/07/2012 End Date 06/07/2012

Delivery Method Classroom Training Firmly Booked









Follow Up Participation

Grade	Edu. Unit Type	Edu. U ...	Ac. Tr. Hr	C Cr. Hrs.	Grade	Attendee Name	Confirmed	Pass
0.00	CPE	4.50	0.00	0.00	0.00	Christine S Morgan		
0.00	CPE	4.50	0.00	0.00	0.00	Gerald M Morgan	X	X
0.00	CPE	4.50	0.00	0.00	0.00	Gina M Morgan	X	X
0.00	CPE	4.50	0.00	0.00	0.00	Hope R Morgan	X	X
0.00	CPE	4.50	0.00	0.00	0.00	James P Morgan	X	X
0.00	CPE	4.50	0.00	0.00	0.00	Marcy A Morgan	X	X









Transfer Qualifications

Attendee Name	Qualification name	Qual.start date	Quali. End Date	Proficny	Proficien.





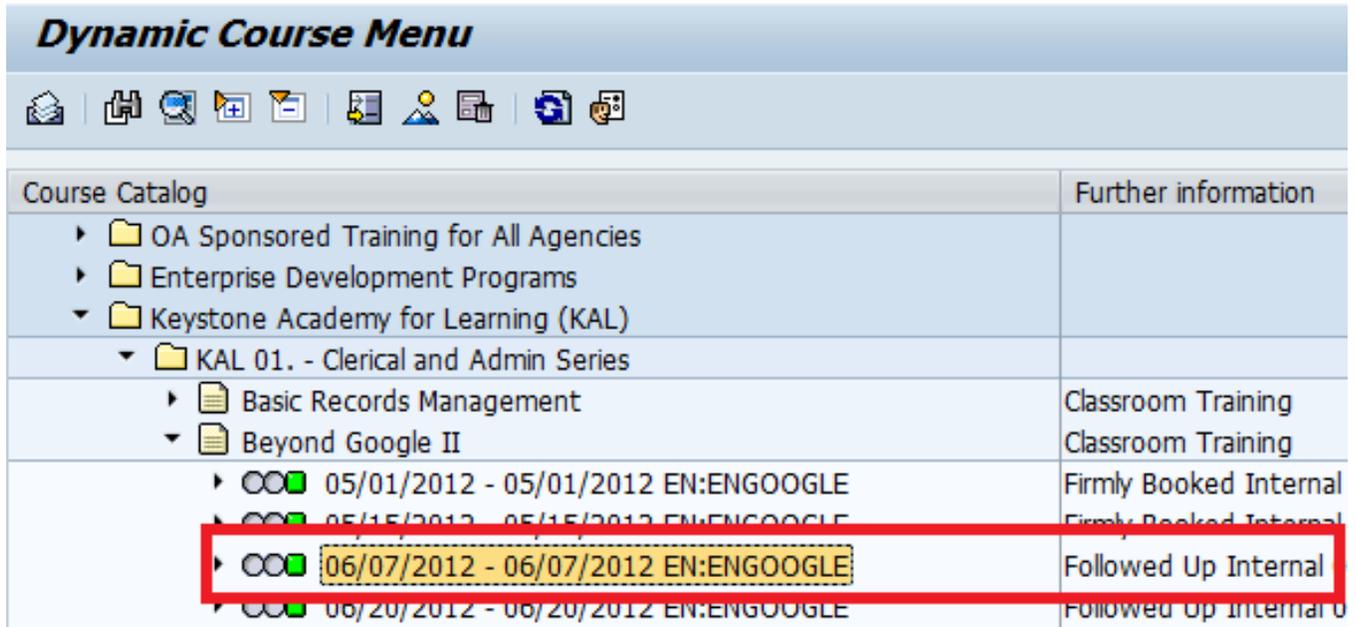




Follow Up Courses

Start date	End date	Course Name	F	Hist.
06/07/2012	06/07/2012	Beyond Google	<input checked="" type="checkbox"/>	<input type="checkbox"/>

31. Back your way out to the Dynamic course menu the same way you did so in step #9. You will now see the course in a "Followed up" state once again.



Course Catalog	Further information
▶ OA Sponsored Training for All Agencies	
▶ Enterprise Development Programs	
▼ Keystone Academy for Learning (KAL)	
▼ KAL 01. - Clerical and Admin Series	
▶ Basic Records Management	Classroom Training
▼ Beyond Google II	Classroom Training
▶ ○○● 05/01/2012 - 05/01/2012 EN:ENGOOGLE	Firmly Booked Internal
▶ ○○● 05/15/2012 - 05/15/2012 EN:ENGOOGLE	Firmly Booked Internal
▶ ○○● 06/07/2012 - 06/07/2012 EN:ENGOOGLE	Followed Up Internal
▶ ○○● 06/20/2012 - 06/20/2012 EN:ENGOOGLE	Followed Up Internal

### **Activity**

Check mark each task after completing.

- Locate your assigned training course.
- Follow up the course using different attendance and evaluation options.

---

## Module 9: Creating Curriculums and Programs

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If you would like participants to complete a series of courses related to a specific topic or job, you should consider creating curriculums or programs in LSO.

Programs and curriculums are very similar. Both allow you to assign a series of courses that must be completed by the participant; however, programs are more flexible than curriculums in terms of how and when the courses are booked and completed.

Curriculums are set up to book participants directly into specific courses associated with the curriculum in a specific sequence. A good example of when a curriculum could be used is the Leadership Development Institute (LDI) managed by the Office of Administration. There is a set group of participants; there is one training session per month for a year. The participants are finished with the curriculum at the end of the year.

Programs are usually set up with more flexibility in terms of when participants book and complete the associated courses. Programs can be used to encourage participants to take a variety of related courses over an extended period of time.

Participants *book* curriculums. They *subscribe* to programs. Once booked into a curriculum, the participant is automatically booked into all courses associated with the curriculum. Depending on how the program is set up, the participant will be able to reference the program course list after subscribing, and will have the opportunity to self-book the associated courses.

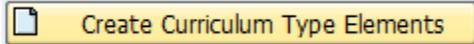
To create a Curriculum Type:

NOTE: This only can be performed by users with the Training Administrator role.

1. Click the Training Administrator link.
2. Click the Catalog link.
3. Click the Create Curriculum Type link.
4. Click the "Create" icon .
5. Complete the Abbreviation/Name fields using your agency naming convention.
6. Enter information in the tabs.  
Note: This is similar to the information you added when creating a Course Type.  
Note: In the 'Curriculum Type Info' tab, select "Whole Curriculum" from the drop down menus for the Follow-Up and Cancellation sections.

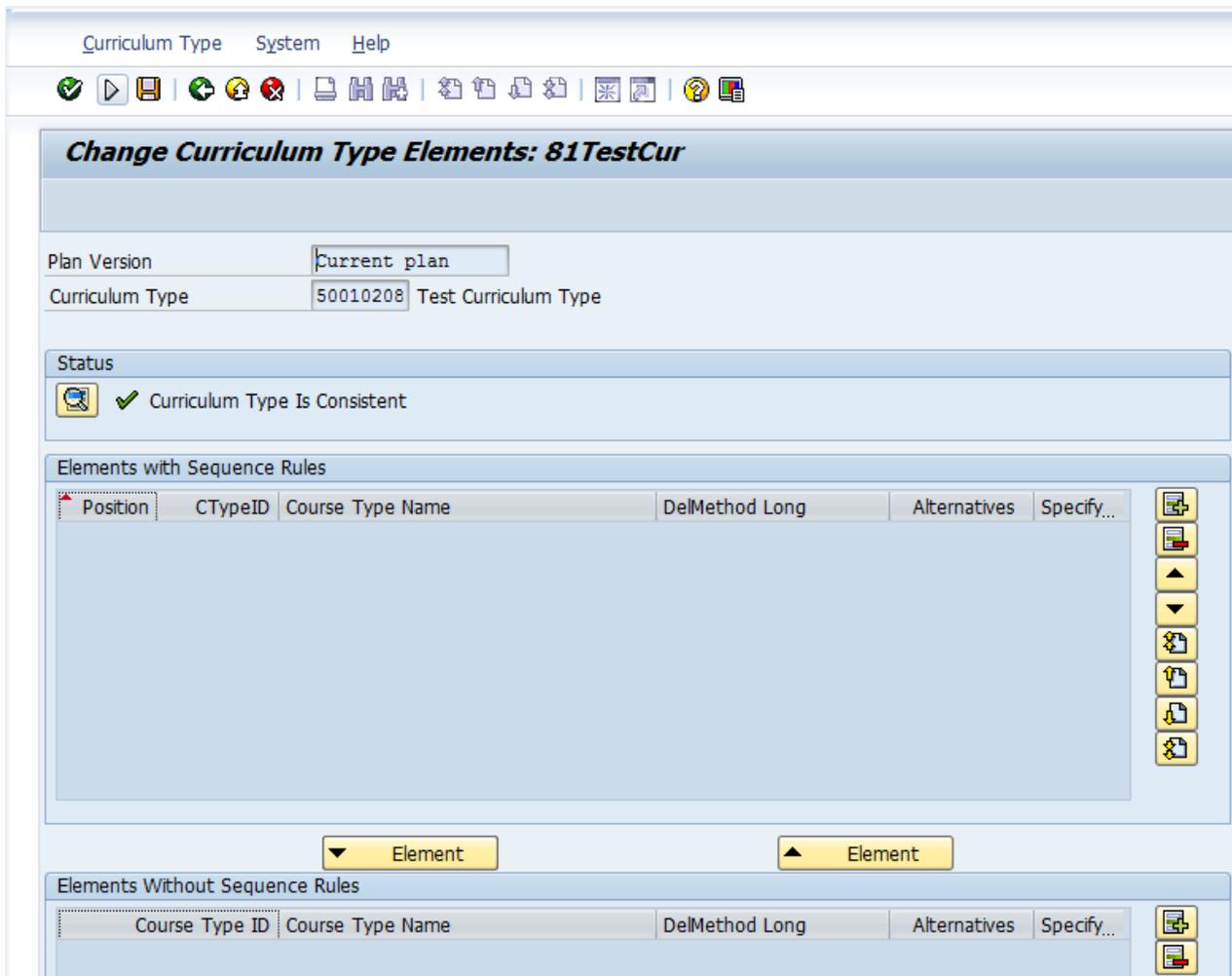
Individuals will not receive credit until the whole Curriculum has been followed-up.

7. Click the "Save" icon .  
"Processing Type" pop-up window appears.
8. Click the "Create Curriculum Type Elements" button



"Change Curriculum Type Elements" screen appears with Elements with Sequence Rules and Elements without Sequence Rules sections.

Note: Scheduled courses associated with a curriculum should be added in the Elements with Sequence Rules section. Web-based training may be added in the Elements without Sequence Rules section.



9. Click the "Insert Row" icon  to add the first Course Type.  
Note: Continue adding Course Types to the Curriculum by clicking the "Insert Row" icon .

The Course Types you add to the Curriculum must have scheduled future dates.

10. Click the "Save" icon .

"The curriculum type elements were saved" message appears.

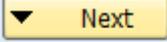
The next thing you'll do is schedule the curriculum to make it available for booking:

1. Click the Courses link.
2. Click the Course link.
3. Click the Schedule a Curriculum link.  
"Curriculum Maintenance" screen appears.

4. Enter the Curriculum Type.

5. Click the "Create" icon .

6. Click the box  left of the course in the Course section.  
The course row is highlighted.

7. Click the "Next" button .

Note: Continue to do this for all courses associated with the curriculum. The Course(s) will move from the Course section to the Course Sequence section.

8. Click the "Save" icon .

"Curriculum was saved" message appears.

To book learners in a Curriculum:

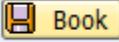
1. Click the Participation link.
2. Click the Dynamic Participation Menu link.
3. Search for the Curriculum.
4. Drill down to the level where you see the scheduled dates.
5. Right click on the curriculum dates.

Pop-up menu appears.

6. Click "Book."

Book Participation: Data pop-up window appears.

7. Search for the person.

8. Click the "Book" button .

Booking Checks pop-up window may appear. You may need to select the green checkmark  to continue.

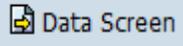
9. Select Curriculum Elements pop-up window may appear.

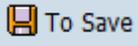
10. Click the "Save" icon .

"Curriculum participation was booked" message appears.

11. Click the "X" icon  to close the pop-up window.

To follow up a Curriculum:

1. Click the Courses link.
2. Click the Course link.
3. Click the Dynamic Course Menu link.
4. Find the Curriculum.
5. Right click on the Curriculum  
A pop-up menu appears.
6. Click "Follow Up."  
"Follow Up Course" screen appears.
7. You may need to select the "Data Screen" button  to obtain the correct view of the participants.
8. Complete the following fields for each participant:
  - Confirmed
  - Pass
  - Follow Up

Note: To complete the fields for everyone with the same status all at once, you can highlight the column title and select the "Mass Change" icon  to update the "Confirmed", "Passed" and "Followed Up" fields simultaneously.
9. Click the "To Save" icon .  
Qualifications will be transferred, if applicable.
10. Click the "Save" icon .
11. "Data has been saved" message appears.

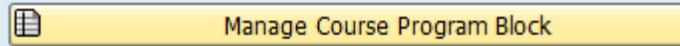
To create a Course Program:

NOTE: This only can be performed by users with the Training Administrator role.

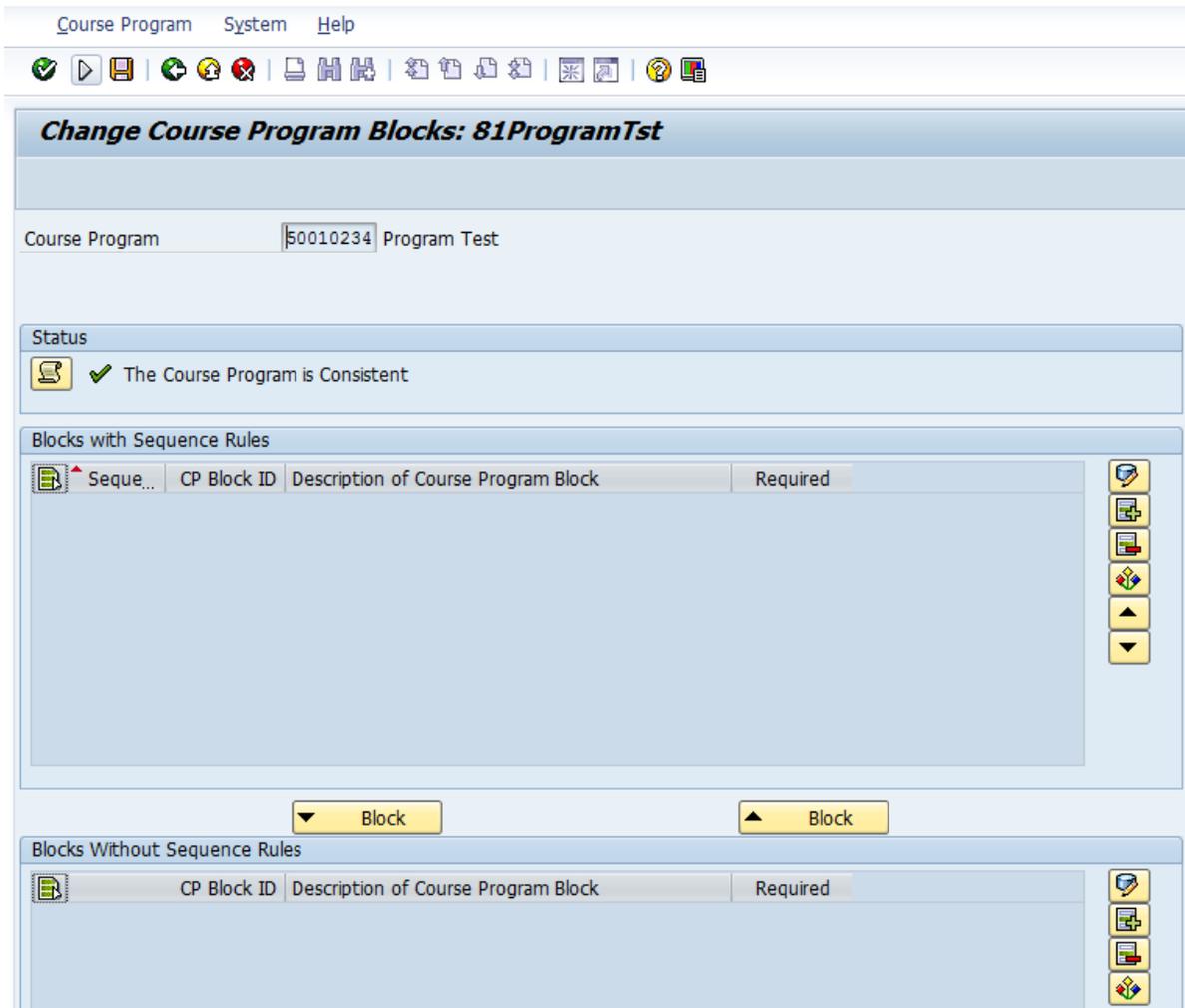
1. Click the Training Administrator link.
2. Click the Catalog link.
3. Click the Create Course Program link.  
"Course Program: Initial Screen" appears.
4. Click the "Create" icon .
5. Complete the Abbreviation/Name fields using your agency naming convention.
6. Enter information in the tabs.  
Note: This is similar to the information you added when creating a Course Type.  
**VERY IMPORTANT:** You must manually select "English" as the language in the "Further Information" tab, "Course Info" section by selecting the "Create"

icon . Then, you must click the "Save" icon  in this section before proceeding.

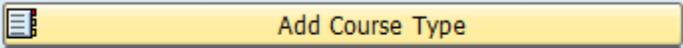
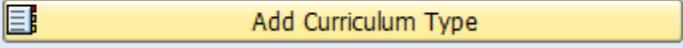
7. Click the "Save" icon .  
"Processing Type" pop-up window appears.
8. Click the "Manage Course Program Block" button



"Change Course Program Blocks" screen appears.



9. Click the "Insert Block" icon .  
"Change Course Program Blocks" pop-up window appears.
10. Enter the object abbreviation and name in the appropriate fields.
11. Click the green checkmark .
12. Click the "Save" icon .
13. "Course program blocks were saved" message appears.

14. Click the box  left of the block name.  
The block row is highlighted.
15. Click the "Edit Block" icon .  
"Change Course Program Block Elements" screen appears.
16. Click the "Insert Element" icon  to add Course Types or Curriculum Types. Select the appropriate button:  
  


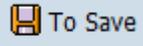
Note: Continue adding Course or Curriculum Types by clicking the "Insert Element" icon .
17. Click the "Save" icon .  
"Course program block elements were saved" message appears.

To subscribe learners to Course Programs:

1. Click the Participation link.
2. Click the Dynamic Participation Menu link.
3. Search for the Course Program.
4. Right click on the Course Program.  
Pop-up menu appears.
5. Click "Subscribe".  
"Subscribe to Course Program" screen appears.
6. Select the language as "English."
7. Search for the person.
8. Click the "Subscribe" button .  
"Course program was subscribed" message appears.

To follow up a Course Program:

1. Follow up each individual course in the Course Program using the standard follow up procedure:
2. Click the Courses link.
3. Click the Course link.
4. Click the Dynamic Course Menu link.
5. Find the Course Program.
6. Right click on the Course Program.  
A pop-up menu appears.
7. Click "Follow Up".

- “Follow Up Participation” screen appears.
8. Complete the following fields for each participant:
    - Confirmed
    - Pass
    - Follow-up
  9. Click the “To Save” icon  .  
Qualifications will be transferred, if applicable.
  10. Click the “Save” icon  .  
“Data has been saved” message appears.

### **Activity**

Check mark each task after completing.

- Create a Curriculum Type.  
Make sure to set the relationship to the agency subfolder you created.
- Schedule the Curriculum.
- Book a person into the Curriculum you just created.
- Create a Course Program.  
Make sure to set the relationship to the agency subfolder you created.
- Subscribe a person to the Course Program you just created.

---

## **Module 10: Creating After-the-Facts (ATFs)**

---

After-the-Facts (ATFs) should be created when learners complete courses that are not listed in your LSO agency training catalog. Out Service Training (OST) and training certifications verified by your agency administrators (Administrator Confirmed Records – ACRs) are examples of these types of records. ATFs will appear on learners' commonwealth training transcripts.

The ATF creation process is actually three steps rolled into one (create the course, book the learners and follow up the course).

ATF courses must be processed for a backdated course to allow the follow up process to work properly.

Before creating your first ATF, you must have at least one Course Type associated with your agency catalog for both Out Service Training and Administrator Confirmed Record.

Note: Start Date must be backdated in the "Course Type: Initial Screen" when creating Course Types for ATFs.

To create an ATF:

1. Click the Training Administrator link.
2. Click the Courses link.
3. Click the Course link.
4. Click the Create ATF link.  
"LSO After Fact Processing" screen appears.

**LSO After Fact Processing**

**Selection Section**

Delivery Method  Out Service Training  
 Admin Confirmed Record

Course Type

Location

No Appraisal  Appraisal

**Course Information Section**

Course Name

Training Date   To

Fee  0.00

**Training Provider**

Company

**Qualification Information**

Keyword Search

Selected Qualifications

Qualification Group	Qualification	Proficiency

5. Select the "Out Service Training" or "Admin Confirmed Record" radio button.
6. Select a Course Type.
7. Enter the training location.
8. Select the "No Appraisal" or "Appraisal" radio button.  
**(Provide further explanation here?)**
9. Enter the course name.
10. Enter the training dates (remember, these must be backdated).
11. Enter the course fee, if applicable.
12. Add qualifications, if applicable.
13. Add attendees.

**Attendance Information**

Person  Organization  Position  Job  Role

Keyword Search

Selected Participants:

Attendee Name	Grade	Pass/Fail	Reason for Fail	Edu Unit Type	Unit Value
		Not Rated ▼			
		Not Rated ▼			
		Not Rated ▼			
		Not Rated ▼			

14. Enter the following information for each attendee:
  - Grade (if applicable)
  - Pass/Fail
  - Reason for Fail (if applicable)
  - Education Unit Type
  - Unit Value
  - Credit Hours
  - Actual Hours
15. Click the "Save" icon . "Course was successfully followed up" pop-up window appears.
16. Click the green checkmark .

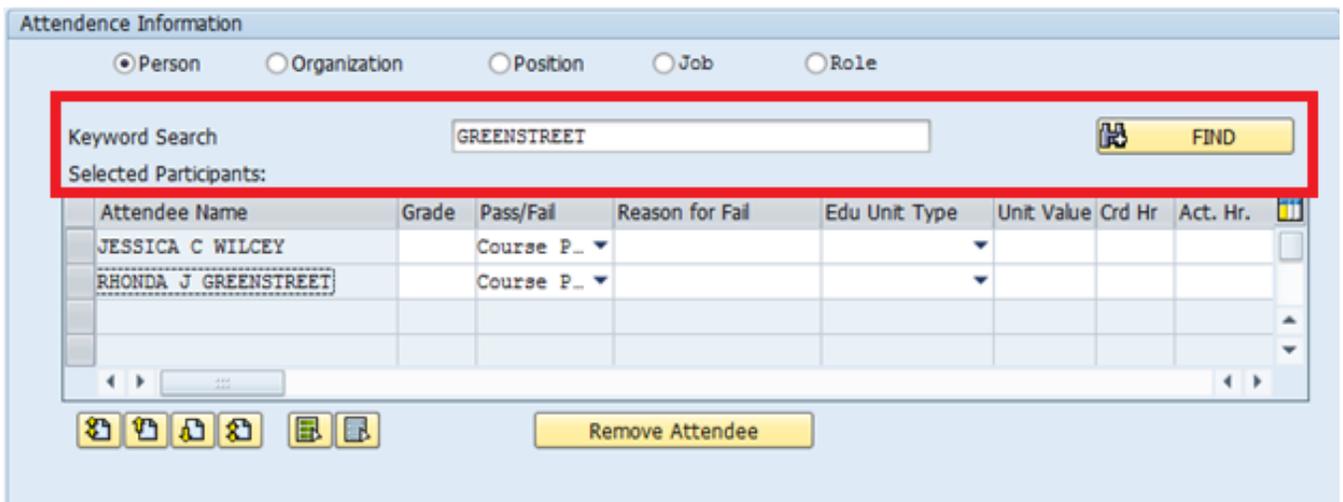
### To Process Less Than 50 Learners at One Time into an ATF

Adding more than 50 learners at one time into an ATF will result in the ATF generating system errors.

You can add as many students into an ATF as needed, but you must add and process the students in batches of 50 or less.

Follow the below procedure to easily process 50 or less learners at once into an ATF:

1. After entering your ATF information, add no more than 50 students for the "Attendance Information" section. Mark them as passed or failed, give them their grades and CPE's where necessary:



The screenshot shows the 'Attendance Information' window with the following elements:

- Radio buttons for selection:  Person,  Organization,  Position,  Job,  Role
- Keyword Search: GREENSTREET
- FIND button
- Selected Participants table:

Attendee Name	Grade	Pass/Fail	Reason for Fail	Edu Unit Type	Unit Value	Crd Hr	Act. Hr.
JESSICA C WILCEY		Course P_					
RHONDA J GREENSTREET		Course P_					

Buttons at the bottom: Save, Print, Refresh, Add, Remove Attendee

2. Save the record:

Navigation System Help

LSO After Fact Processing

Selection Section

Delivery Method  Out Service Training  
 Admin Confirmed Record

Course Type 50002481

Location HONOLULU

Course Information Section

Course Name Introduction to Game Design @ Square Inc

Training Date 03/03/2014 To 03/03/2014

Fee 999.99

3. Go back to the "Attendance Information" section and click the 'Select All' button. This will highlight all your students in the Attendance Information section:

Attendance Information

Person  Organization  Position  Job  Role

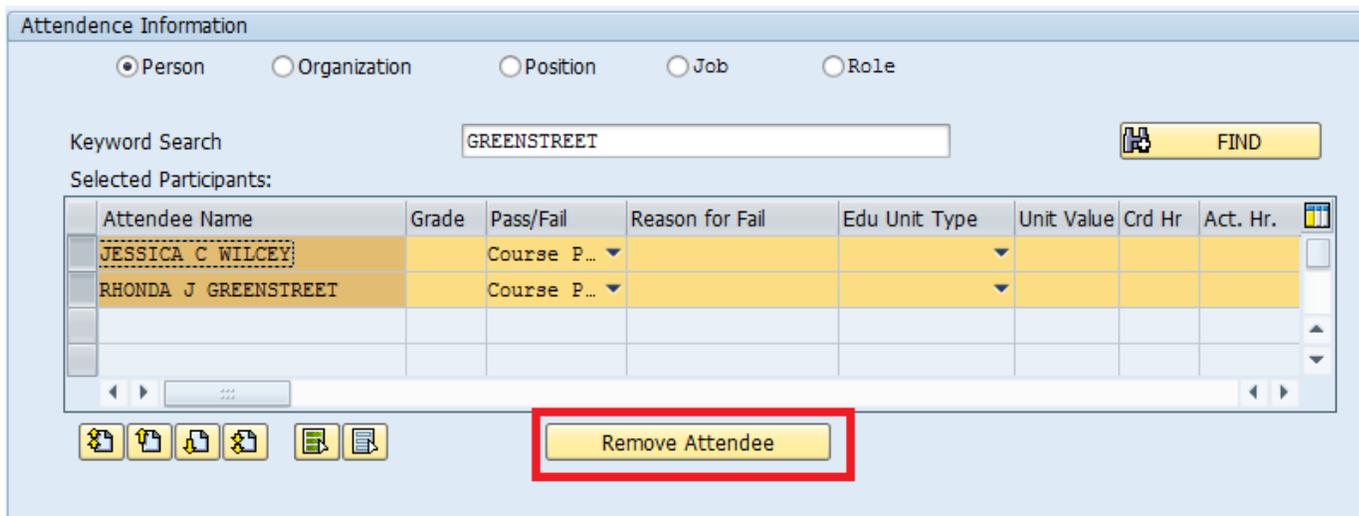
Keyword Search GREENSTREET FIND

Selected Participants:

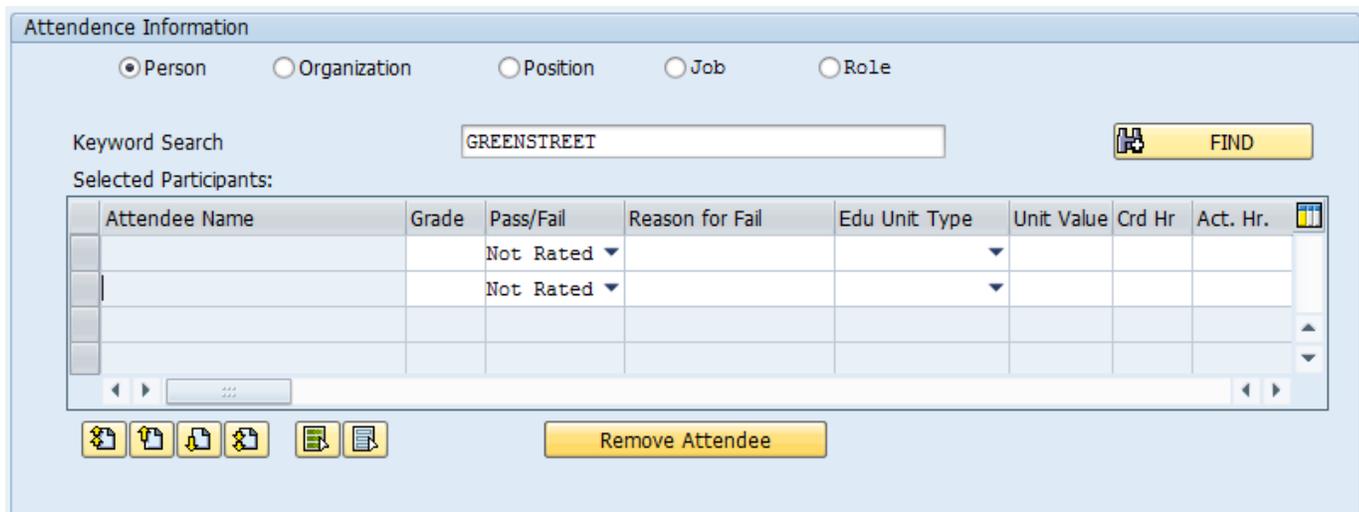
Attendee Name	Grade	Pass/Fail	Reason for Fail	Edu Unit Type	Unit Value	Crd Hr	Act. Hr.
JESSICA C WILCEY		Course P...					
RHONDA J GREENSTREET		Course P...					

Select All Remove Attendee

4. Click the "Remove Attendee" button:



5. All the Attendees are now removed from the processing screen and you can begin inputting your next group of learners:



**NOTES:**

- You can add as many students to an ATF as needed, but you must add and process the students in batches of 50 or less.
- Remember, it is important to SAVE your record (step #2) before removing the Attendees.
- Removing the Attendees does NOT remove their transcript entry for this ATF, it merely removes them from the processing screen so you can begin entering more employees.
- All the rest of your ATF information should be preserved after saving, so all you have to do is continue to process your learners.

- Following this method will allow you to process batches of 50 or less learners at once without system errors.

### **Activity**

Check mark each task after completing.

- Create Out Service Training and Administrator Confirmed Record Course Types in the agency subfolder (ex. Health ML T3) you created earlier.
- Create ATFs for both Out Service Training and Administrator Confirmed Record.

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## Module 11: Creating/Managing Locations and Rooms

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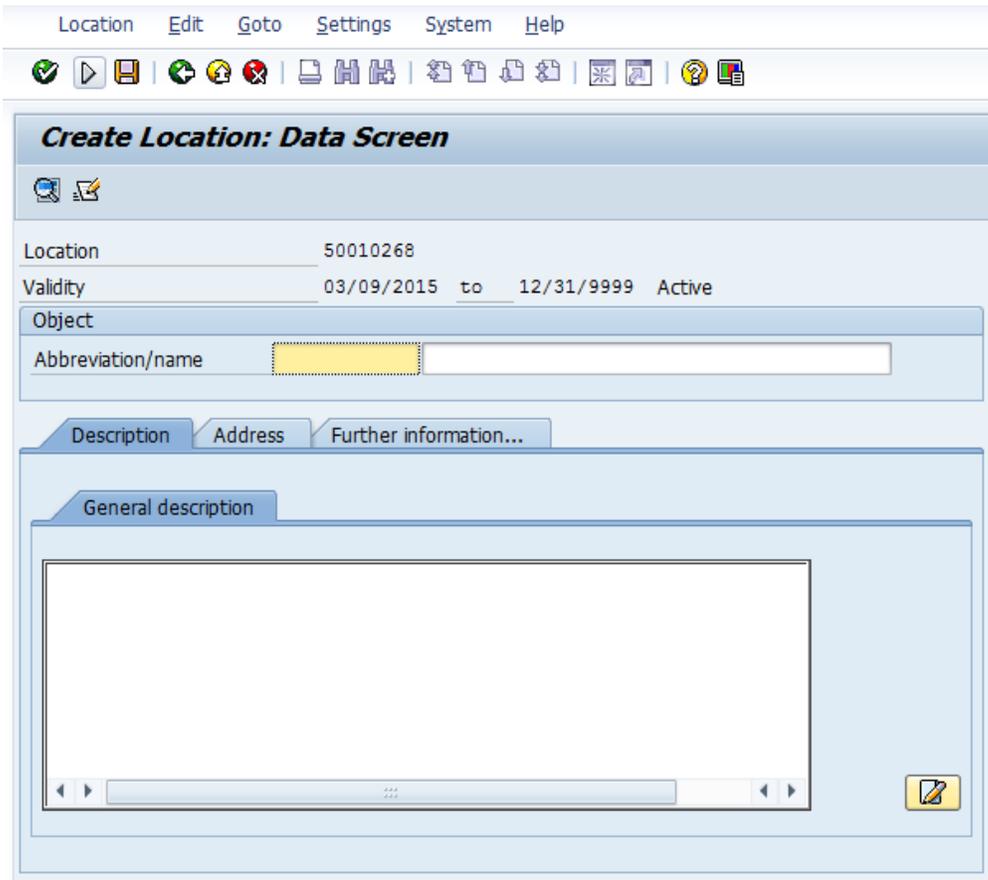
NOTE: This only can be performed by users with the Training Administrator role.

The location refers to the building location of the training. The creation of rooms within the building will be detailed later in this module. The location needs to be created prior to creating and assigning a room to that location.

If you are unable to locate a location or room in the system, please email OA, HRD at [ra-lsoadministrator@pa.gov](mailto:ra-lsoadministrator@pa.gov) before creating another instance. OA, HRD may be able to help you locate it and prevent duplicate creation of locations and rooms in the system.

To create a new location:

1. Click the Training Administrator link.
2. Click the Locations link.
3. Click the Manage Locations link.
4. Click the "Create" icon .  
"Create Location: Data Screen" appears.



Location 50010268

Validity 03/09/2015 to 12/31/9999 Active

Object

Abbreviation/name

Description Address Further information...

General description

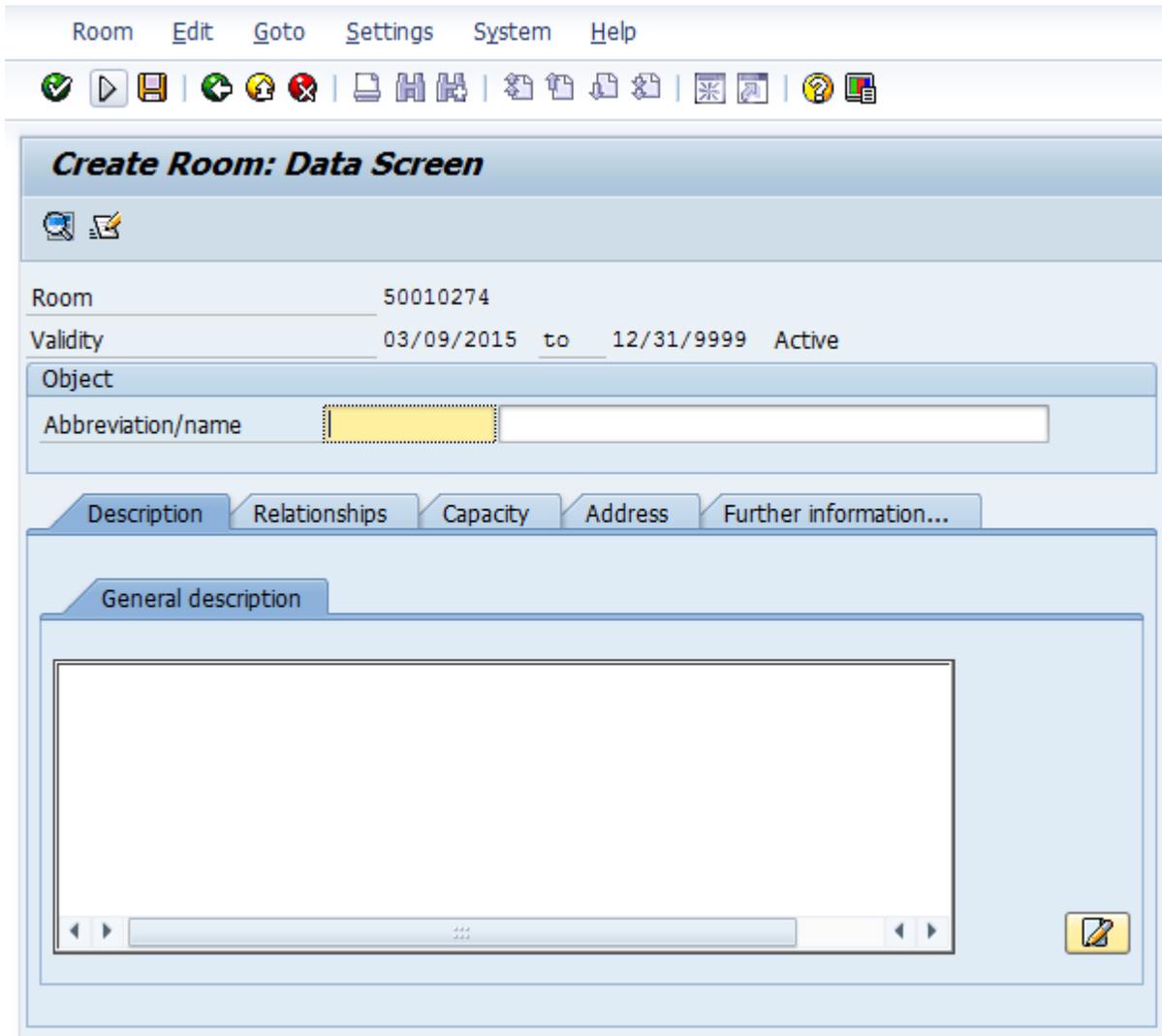
5. Complete the Abbreviation/Name fields using the standard naming convention.

Example: 333MKTST/HRSBRG: 333 Market St.

6. Complete the Description, Address and Further Information tabs.
7. Click the "Save" icon .  
"Business event location was created" message appears.

To create a room and assign it to a location:

1. Click the Training Administrator link.
2. Click the Locations link.
3. Click the Manage Rooms link.
4. Click the "Create" icon .  
"Create Room: Data Screen" appears.



Room Edit Goto Settings System Help

**Create Room: Data Screen**

Room 50010274

Validity 03/09/2015 to 12/31/9999 Active

Object

Abbreviation/name

Description Relationships Capacity Address Further information...

General description

Save icon

5. Complete the Abbreviation/Name fields using the standard naming convention.

Example: ConfA/Conference Room A 13<sup>th</sup> Floor

6. Complete the Description, Capacity, Address and Further Information tabs.

Note: Capacity tab – The capacity set within the creation of the room, will override the capacity set at the course level

Address tab – The 'Building' field can be set to "See Location for Address".

7. Click the Relationships tab.

- In the 'ID rel.object' column, search for and select the building location that the room is associated with in the 'Belongs to' field.
- In the 'ID rel.object' column, search for and select the resource type (i.e. classroom) in the 'Is a specialization of' field.

8. Click the "Save" icon .

"Resource was created" message appears.

## **Activity**

Check mark each task after completing.

- Create a new location.  
Use the naming convention "Building T3 Initials."  
Example: Bldg T3 ML
- Create a new room associated with the location you just created.  
Use the naming convention "Room T3 Initials."  
Example: Room T3 ML

---

## Module 12: Creating External Learners

---

External Learners can be created within LSO to book individuals into a course to reserve a seat for them. This procedure would be used for anyone who is a contractor or not a commonwealth employee already in the LSO system. External Learners do not have access to the system and will not have an employee training transcript. As an example, this procedure would be used for individuals in independent agencies that need to attend classroom training.

To create External Learners:

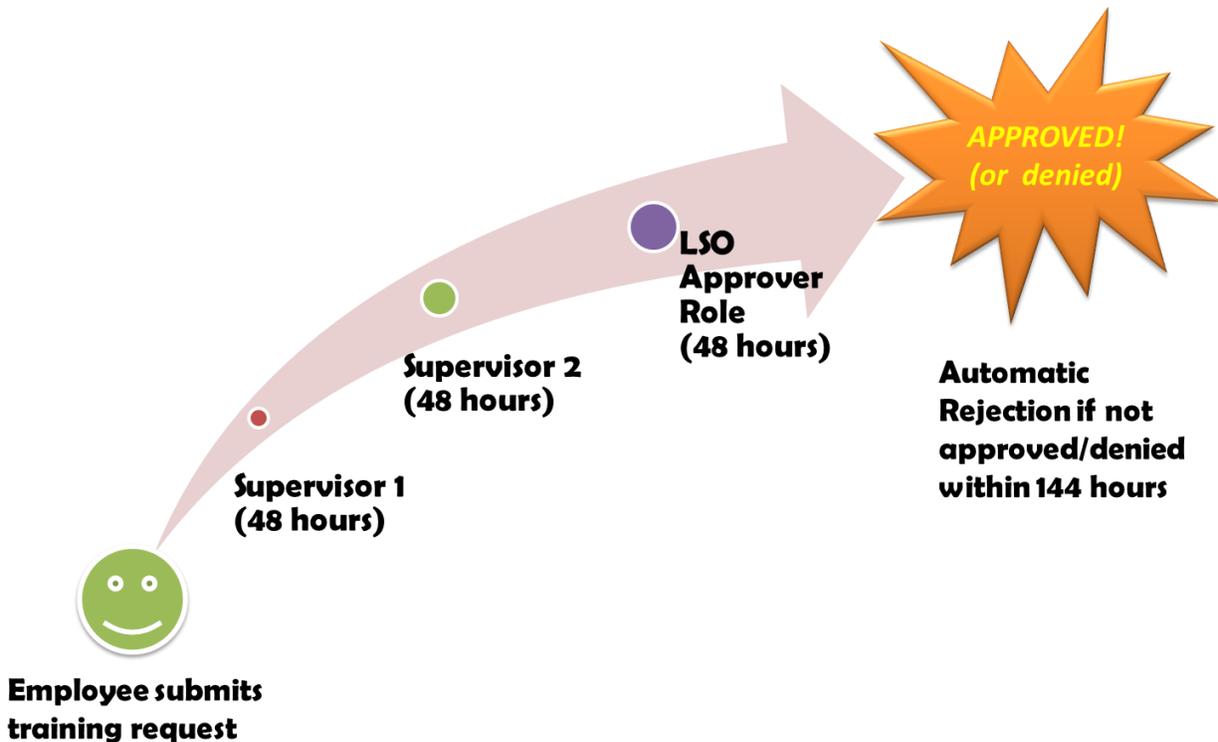
1. Click the Training Administrator link.
2. Click the Participation link.
3. Click the Create External Learner link.
4. Select External Person by clicking on the green checkmark/clock icon  External person.  
    "External Person: Initial Screen" screen appears.
5. Click the "Create" icon .  
    "Create External person: Data Screen" screen appears.
6. Enter text into 'First Name' and 'Last Name' fields.
7. Click and complete the following tabs:
  - a. Relationships  
    This is where you will create the relationship to the company where the External Person is a member.
    - I. Click in the 'Belongs to' field under the 'ID rel.object' column. Use the "Search" icon  to locate the company.  
        "Search Term" screen appears.
    - II. Search for the company using the 'Search Term' field or select the green checkmark  to review a list of companies.  
        "Search Term" results screen appears.
    - III. Double click the company associated with your External Person.
  - b. Address  
    Complete all applicable fields.
  - c. Name Format  
    Complete any applicable fields, if desired.
8. Click the "Save" icon .

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## APPENDIX

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### Employee Training Requests and Workflow in LSO:



### Employee training requests that require supervisor approval behave as such:

1. Employee submits a training request.
2. The training request immediately shows up in the 1<sup>st</sup> level supervisors Universal Work List (or UWL).
3. At 5:00 PM that evening, the 1<sup>st</sup> level supervisor will get an email notifying them they have items in their UWL to act on (if they have not already acted on the request).
4. After 48 hours, the training request bumps to the 2<sup>nd</sup> level supervisor; it shows up in their UWL immediately as well.
5. At 5:00 PM that evening, the 2<sup>nd</sup> level supervisor gets an email notifying them they have items in their UWL to act on. The 1<sup>st</sup> level supervisor can still see the item in their UWL as well (only if they or the 2<sup>nd</sup> level supervisor have not acted on the request).
6. After 48 hours, the training request bumps to all agency LSO Approvers, it shows up in their UWL immediately.
7. At 5:00 PM that evening, the agency LSO Approvers gets an email notifying them they have items in their UWL to act on. The 1<sup>st</sup> and 2<sup>nd</sup>

level supervisors can still see the item in their UWLs as well (again, only if nobody has acted on the request yet).

8. If no action is taken in another 48 hours (144 hours total), the request is auto-rejected and the employee and 1<sup>st</sup> level supervisor get an email notifying them of such.

**NOTES:**

- LSO approvals hit the UWL instantly upon the 48 hour windows detailed above, but the email doesn't get sent notifying anyone they have items to process, until 5:00 PM, the day the request was made.
- A supervisor or approver can get a UWL email at 5:00 PM. And if somehow the item has been acted upon before they check their UWL, the request won't show any longer in their UWL.
- If a supervisor or approver claims a UWL request when it hits their UWL, and if they have it open and/or haven't 'Replaced' it or have approved or rejected it by 5:00 PM, no more UWL emails will flow to anyone.
- One final bit of clarification on the 5:00 PM email. You only get one of these. So for example, let's say you submitted a booking request and for the purposes of this example you are not an LSO Approver. At 5:00 PM your supervisor would get an email. Two days later if your supervisor didn't act on it, their supervisor would get an email but your supervisor would not get an additional email. Two days later, if no one acted on it, your LSO Approvers would get an email but again, the 1<sup>st</sup> and 2<sup>nd</sup> level supervisor would not. Furthermore, if someone interrupts the chain of processing by opening the item and selecting "Process Later", no further emails would be sent because someone is holding the work item.

Training ID's for the LSO training environment referred to as Sandbox:

LSO Sandbox URL: <https://qatweb01.state.pa.us:82/irj/portal>

User ID	Password
LSOTRAIN01	Imagine#1
LSOTRAIN02	Imagine#1
LSOTRAIN03	Imagine#1
LSOTRAIN04	Imagine#1
LSOTRAIN05	Imagine#1
LSOTRAIN06	Imagine#1
LSOTRAIN07	Imagine#1
LSOTRAIN08	Imagine#1
LSOTRAIN09	Imagine#1
LSOTRAIN10	Imagine#1
LSOTRAIN11	Imagine#1
LSOTRAIN12	Imagine#1
LSOTRAIN13	Imagine#1
LSOTRAIN14	Imagine#1
LSOTRAIN15	Imagine#1
LSOTRAIN16	Imagine#1
LSOTRAIN17	Imagine#1
LSOTRAIN18	Imagine#1
LSOTRAIN19	Imagine#1
LSOTRAIN20	Imagine#1
LSOTRAIN21	Imagine#1
LSOTRAIN22	Imagine#1
LSOTRAIN23	Imagine#1
LSOTRAIN24	Imagine#1
LSOTRAIN25	Imagine#1
LSOTRAIN26	Imagine#1
LSOTRAIN27	Imagine#1
LSOTRAIN28	Imagine#1
LSOTRAIN29	Imagine#1
LSOTRAIN30	Imagine#1
LSOTRAIN31	Imagine#1
LSOTRAIN32	Imagine#1
LSOTRAIN33	Imagine#1
LSOTRAIN34	Imagine#1