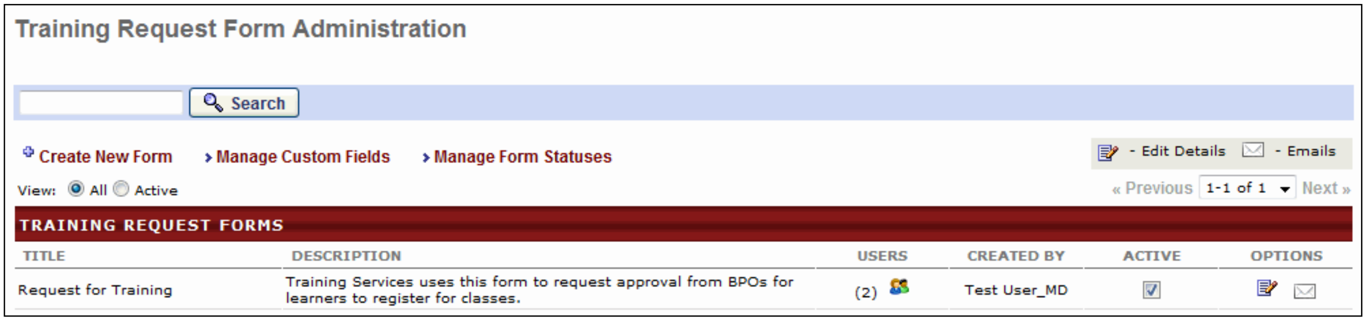
Training Request Form Administration

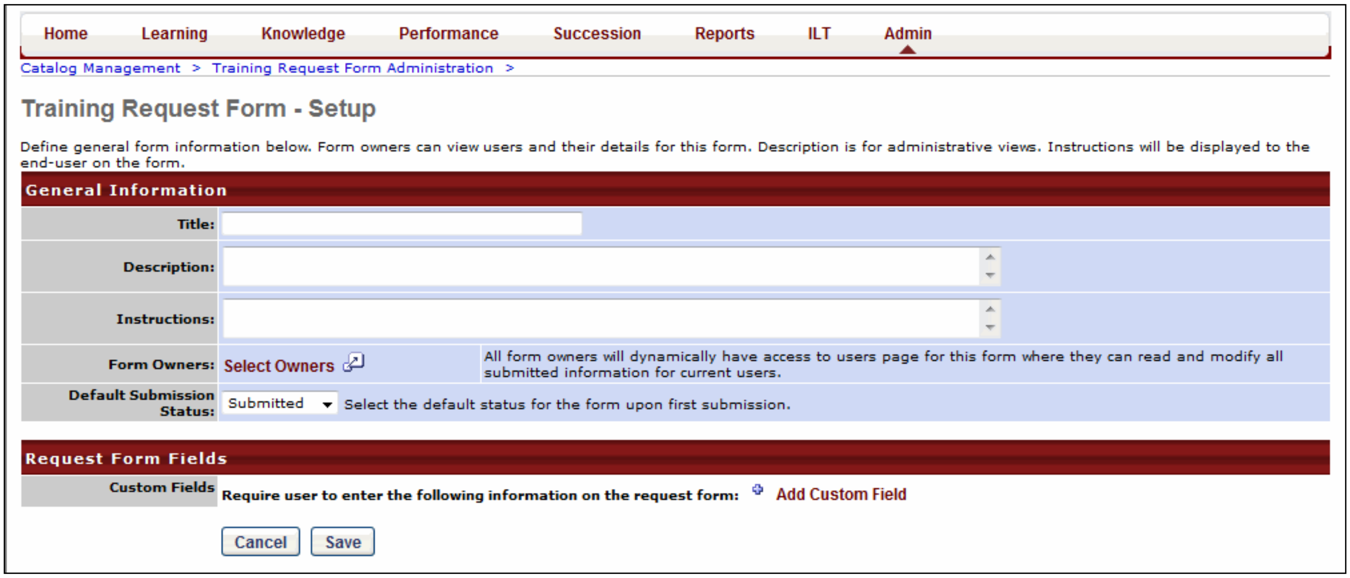
Training Request Forms are designed to obtain additional information from a learner when requesting training in ULearn. The **Training Request Form Administration** page is where administrators can create and manage the request forms available in the system.



Field Name	Description
Search	Search for existing forms.
Create New Form	Select to create a new training request form.
Manage Custom Fields	Select to create custom fields to add to forms.
Manage Form Statuses	Select to configure the names for the form status options.
View	Click to see All forms or just the Active forms.
Users	Lists the number of users associated to this form. Clicking on the users icon displays the Users detail page for that form.
Active	Check to make forms active or inactive.
Edit	Click to edit the existing form.
Emails	Select to customize email triggers specific to each form.

Training Request Form Administration (cont.)

CREATE A TRAINING REQUEST FORM



1. Go to **Admin > Catalog Management.** Select Training Request Form Administration.

2. Click <Create New Form>.

3. Enter the following information:

    - Title: Enter a title for the form. This is visible when selecting a form to attach to a learning object.
    - Description: Enter text that is visible only to administrators. This displays on the **Training Request** page.
    - Instructions: Enter text that appears at the top of the form as instructions.
    - Form Owners: Click to add owners. Owners have access to the form and can modify all user forms.
    - Default Submission Status: Select the default status. The form will change upon first submission by the user.
    - Add Custom Field: Click the link to add existing custom fields to the form.
        - Select fields to add to form, then click <Submit>.
        - Order: Enter number to rearrange order of fields.

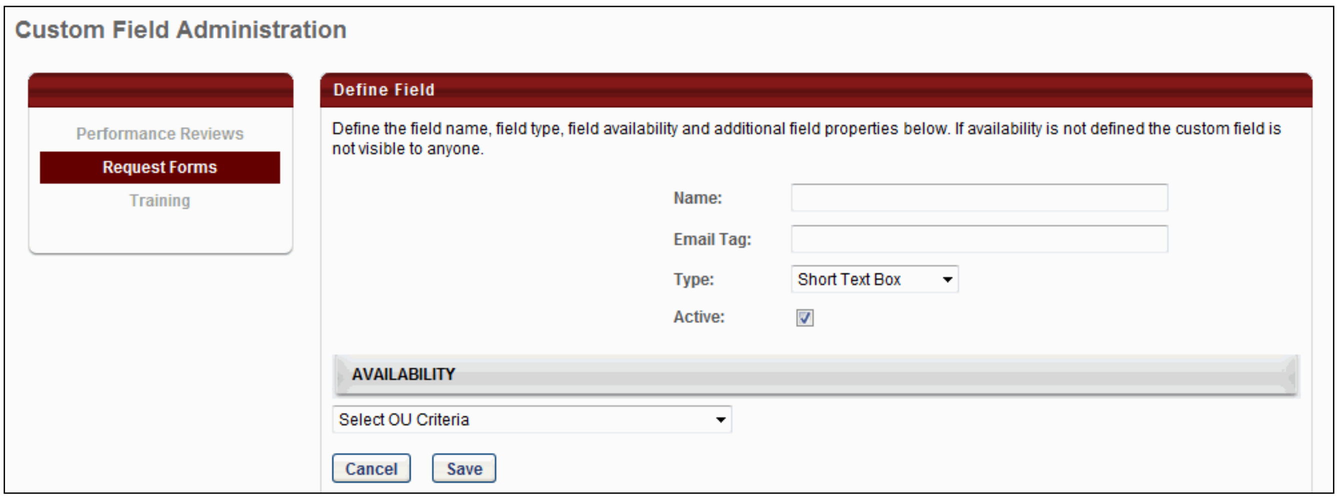
Training Request Form Administration (cont.)

- Display Name: Enter text to change name of custom field for user. The same custom field may be used across forms, but have different display names for the user.
- Response Required: Check to make field required. If selected, the form cannot be submitted until the user enters a value in the field.

4. Click <Save>.

CREATING CUSTOM FIELDS FOR TRAINING REQUEST FORMS

To create a Request Form custom field:



1. Click the Add Field icon .
2. Enter the name of the custom field that will be visible to the learner.
3. Enter the name for the email tag to be associated with this field. It can be used to retrieve the value of this field in email communications.

- Best practice is to create email tags in all capital letters. Custom tags are prefixed with the word CUSTOM. For example, for the custom field called *Profit Net*, create the tag using PROFIT.NET and the system will convert this to CUSTOM.PROFIT.NET.

4. Select field Type from the drop-down menu. The following types are available:
    - Checkbox
    - Date Field

- Dropdown
- Hierarchy
- Multiple Checkbox
- Numeric Field
- Radio Button
- Scrolling Text Box
- Short Text Box

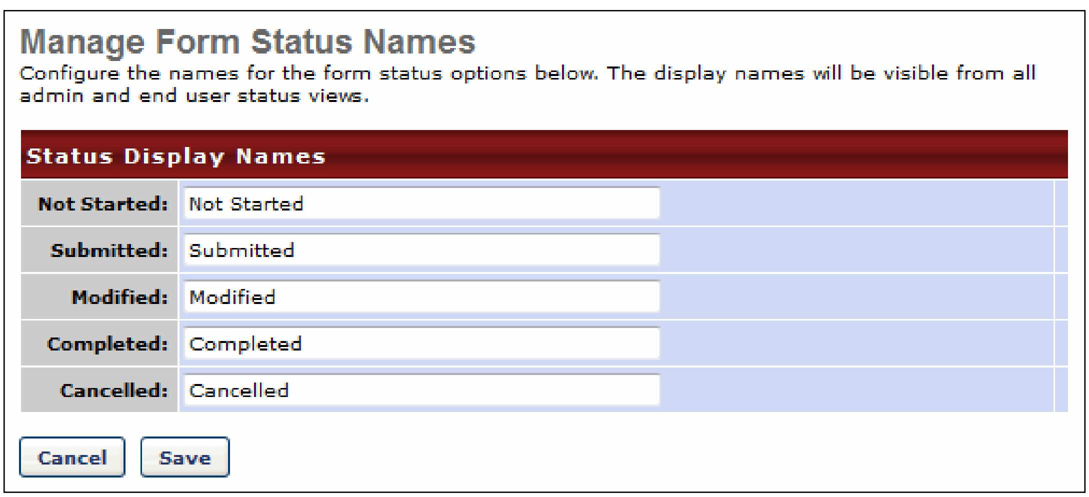
5. Check to make the field active.

6. Define the availability which users have the ability to view and access the custom field. If availability is not set, then the field will not appear for use.

7. Click <Save>.

MANAGE TRAINING REQUEST FORM STATUSES

The five standard Training Request Form statuses may be configured. The names entered will appear for all administrator and learner views involving request forms.



Training Request Form Administration (cont.)

1. Go to **Admin > Catalog Management**. Select Training Request Form Administration.

2. Click <Manage Form Statuses>.

3. The following statuses are related to Training Request Forms:

    - Not Started: Default status for when learners are proxy enrolled into training with a request form attached. Once information on the form is submitted, they will move out of this status.
    - Submitted: Upon the first submission of the form, the status will change to Submitted.
    - Modified: If the learner changes information in their form and resubmits the status will change to Modified.
    - Completed: An administrator/owner has the option to mark the form complete. Once the administrator marks the form complete the status will change to completed.
    - Cancelled: If the form is tied to a session, the status will automatically change to cancelled if the learner withdraws from the session or if the session is cancelled.

4. Enter name changes for the status names as desired.

5. Click <Save>.

ATTACH A TRAINING REQUEST FORM TO TRAINING

A Training Request Form may be attached to any type of learning object in the system. There are two ways to do this.

Via the Course Catalog (for Online Classes)

1. Go to the **Admin** page.

2. Click <Catalog Management>.

3. Click <Course Catalog>.

4. Search for Learning Objects in Course Catalog.

Training Request Form Administration (cont.)

5. Click the Edit icon to the left of the learning object.

6. A Training Request form can be added via the <General> link or the <Availability> link.

7. Select the form from the **Training Request Form** drop-down menu to attach a previously created request form.

8. Click <Save>.

Via ILT Manage Events and Sessions

1. Go to the **ILT** page.

2. Find the event.

3. Click the Edit icon.

4. Click <Session Defaults>.

5. Select the form from the **Training Request Form** drop-down menu to attach a previously created request form.

6. Click <Save>.

Learner Use of Training Request Forms

- When attaching a Training Request form to a learning object, only users who have not yet requested that learning object will see the form.

- The Training Request Form displays for learners when they request the learning object. If proxy enrolling the learning object, the learner can access the Training Request Form from the Training Details in the transcript.

- The learner can modify the Training Request Form after initial submission by accessing it from the Training Details in the transcript.

Training Request Form Administration (cont.)

MANAGING TRAINING REQUEST FORMS

1. Go to the **Admin** page.
2. Click <Catalog Management>.
3. Click <Training Request Form Administration>.
4. Click the Users icon for any Form to view all users who have a learning object with that form attached.
5. Click the Details icon to see additional details.

Search Filters

User Last Name :

Form Status : All

Search

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Corporate Users

NAME	USER ID	IDENTIFIER	TRAINING TITLE	TRAINING TYPE	TRANSCRIPT STATUS	FORM STATUS	DETAILS
[illegible]	[illegible]	University of Minnesota (Division) Client Admin Position (Position)	Conflict Fluency (Starts 5/24/2012)	Session	Registered	Completed	
[illegible]	[illegible]	University of Minnesota (Division) Client Admin Position (Position)	Conflict Fluency (Starts 5/10/2012)	Session	Registered	Submitted	
[illegible]	[illegible]	University of Minnesota (Division) Client Admin Position (Position)	Conflict Fluency (Starts 5/9/2012)	Session	Registered	Completed	
[illegible]	[illegible]	University of Minnesota (Division) Client Admin Position (Position)	Conflict Fluency (Starts 4/25/2012)	Session	Completed	Modified	
[illegible]	[illegible]	University of Minnesota (Division) Client Admin Position (Position)	Conflict Fluency (Starts 4/19/2012)	Session	Registered	Modified	
[illegible]	[illegible]	Client Admin Division (Division) University of Minnesota (Position)	Conflict Fluency (Starts 5/24/2012)	Session	Withdrawn	Cancelled	
[illegible]	[illegible]	University of Minnesota (Division) Client Admin Position (Position)	Conflict Fluency (Starts 4/25/2012)	Session	Completed	Submitted	