My Learning Connection

ADMINISTRATOR & INSTRUCTOR USER GUIDES

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Human Resources - Organizational and Talent Development HRLearning@missouristate.edu 417.836.7683

How do I create and copy events?

Create new events by entering new information or by copying a similar event and editing some key areas to create a new event.

Create an Event

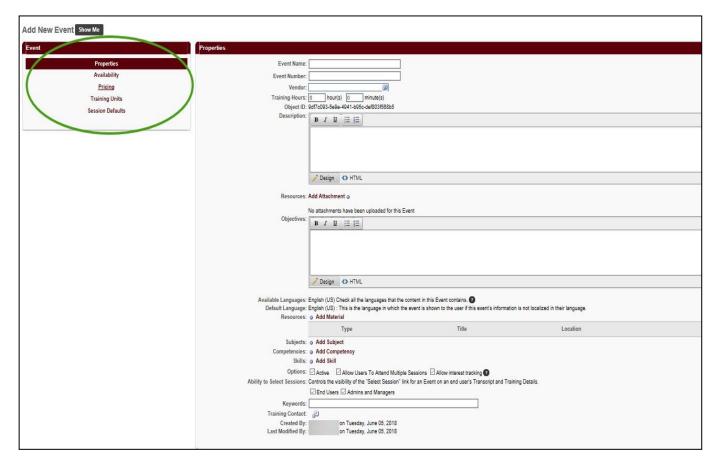
1. Hover over the ILT tab and select Manage Events and Sessions.



2. To create a new event, select Create New Event and a new window will open.



There are 5 areas (see left sidebar) to complete to set-up up your new event before adding the sessions for the individual occurrences - Properties, Availability, Pricing, Training Units, and Session Defaults.



3. Properties – Complete the following information for this section:

Required Fields

- a. Event Name Type in event name
- b. Event Number Leave blank
- **c.** Vendor Select to see a list of vendors and select one.
- **d.** Training Hours Enter hours and minutes based on the contact hours
- e. Description Type or copy a short description that will display in the catalog for the end user.

 Note: Location, dates, times, or information specific to individual sessions will be added at the session level.
- f. Objectives Optional
- g. Resources Material added by system administrator Provide users with resources via email a better option
- h. Subjects Select to access list, select at least one subject.
- i. Competencies Leave blank
- j. Skills Leave blank
- k. Options -
 - Active allows end users to see the event in the catalog.
 - Allow Users To Attend Multiple Sessions enables end users to attend all new sessions added to the event.
 - **Allow Interest Tracking** allows end users to select this option when there are no current sessions available for registrations.
- I. Ability to Select Sessions Select both options End Users and Admin and Managers
- **m. Keywords** Optional The system already dynamically searches on the title and other information entered through the setup for the session.
- **n.** Training Contact Select 1 to access a list of training contacts and select one.
- o. Select Next to proceed.



- 4. Availability This section defines who has access to register for the event.
 - a. Copy Availability to New Sessions default setting

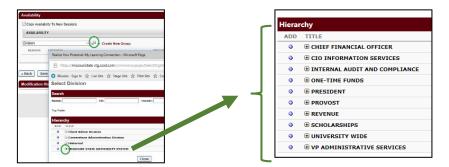


b. To include the entire MSU system, select the down arrow, select All Users then Add.





c. Part of the MSU system can be selected. i.e. Select the down arrow in the area that says Select Criteria and select Division. Using the flyout, select the correct division. The next screen includes a list of MSU units. Select the blue + to include that unit. Selecting the black + will drill down further in a particular unit.



- d. Unpaid (\$0) classes Select Include Subordinates, Pre-Approved and Register Upon Approval (all three boxes)
- e. Classes with a cost Select Include Subordinates and Pre-Approved (first two boxes)
- f. Note: Select the first two boxes for an event that has sessions with different prices.
- g. Select Next to proceed.



- 5. Pricing Determines the event price.
 - a. Enter the amount in dollars and cents. For example, twenty dollars would be 20.00.
 - b. Note: Set the price at \$0 for an event that has sessions with different prices.
 - c. Leave at default of Active Pricing.
 - d. Select Next to proceed.



6. Training Units - The system will default to "Allow usersvalue". Do not change default. Select **Next** to proceed.



7. Session Defaults - These settings are defaults for every session you add to assist with ease of entry. They can be edited at the session level when needed.

Required Fields

- a. Registration
 - Registration Deadline Select when you want the registration to close based on the first part of session start date and time. Can be set up in weeks, days, hours, and minutes; before or after first part of session.
 - Minimum Registration Enter at least one (1)
 - Maximum Registration Enter a number
- b. Waitlist These are all default settings
 - Allow waitlist for sessions in this event allows the system to auto manage it or not
 - Allow auto-management system automatically manages the waitlist
 - Auto-register user upon granting waitlist
 - Limit users to one waitlist per event optional
 - Waitlist Deadlines for response by users and availability of waitlist
- c. Cost

Enter the amount in dollars and cents. For example, twenty dollars would be 20.00.

Note: Should match the amount listed under the Pricing Tab you entered earlier.

- Restrict Withdraw from Sessions <u>Select for all paid classes (Required)</u>
- d. Advance Criteria
 - Credits per Session Enter the number of credits based on contact hours for the sessions. i.e. The session meets 8 hours which would equal 8 credits.

Note: Enter in decimals for partial contact hours. For example 8 ½ hours would be 8.5 contact hours.

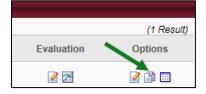
- e. Prerequisites ability to add required training
- f. Additional Requirements can add additional training if necessary.
- g. Select Save.
- **8.** After saving the event, create the sessions associated with the event. Refer to the Administrator and Instructor guide *How do I create and copy sessions?*

Copy an Event

After saving the event you will be able to create new events with similar information.

Note: If the <u>event content</u> or <u>session length</u> change, a new event and session(s) <u>must be created</u> since you will impact the training details information for users who have already completed the previous event/session.

- 1. Hover over the ILT tab and select Manage Events & Sessions. A list of your events will appear on the page.
- 2. Find your event and select Copy Event.

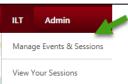


- 3. Complete new event information on the **Copy Event** pages. Follow the same process used in creating a new event to edit your information. Be sure and **Save** your new event.
- **4.** After saving the event, create the sessions associated with the event. Refer to the Administrator and Instructor guide *How do I create and copy sessions?*

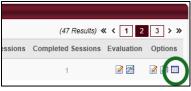
How do I create and copy sessions?

Create a Session

 Hover over the ILT tab and select Manage Events & Sessions. A list of your events will appear on the page.



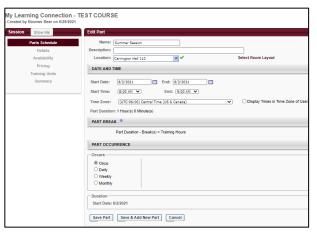
2. Find your event and select View Sessions.



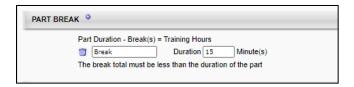
3. Select the part to Create New Session.



4. You will be redirected to the **Edit Part** screen to edit the name, location, date, time and instructor for the session part as needed.



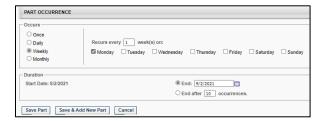
5. To add a Part Break, select the blue plus sign.



6. Session with one part - Select **Save Part** at the bottom of the screen.

7. Session with multiple parts – Some sessions may occur over the period of several days (i.e. A training may occur over the period of five Mondays, 1pm-3pm). In the **Part Occurrence** box, select how often the part will occur.

After you have finished editing, select Save Part at the bottom of your screen.



8. You will be returned to the **Parts Schedule** screen where you can view your new session part information. When everything is correct, select **Next**.



9. On the left sidebar, there are 6 areas to review and complete. The **Parts Schedule** is already done. The information from the event should copy to the session, however, it is a good idea to review to ensure that it is correct. There are some fields that are specific to the session.



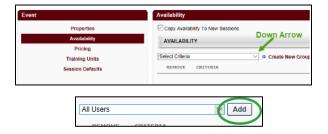
10. Details

Required fields

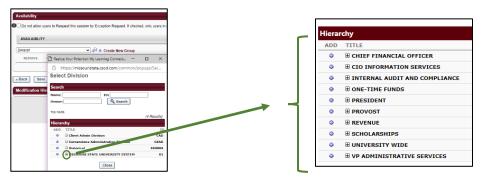
- a. Session ID This is the name that will appear on the session in the catalog
- b. Credits Should match the training hours

Information in the remaining fields on this page should have copied from the **Session Defaults** page of the event. Changes can be made that are specific to the session created.

- 11. Availability If necessary, change the settings for the session. The process is the same as for an event.
 - a. To include the entire MSU system, select the down arrow, select All Users then Add.



b. Part of the MSU system can be selected. i.e. Select the down arrow next to Select Criteria and select Division. Using the flyout, select the correct division. The next screen includes a list of MSU units. Select the blue + to include that unit. Selecting the black + will drill down further in a particular unit.



- Unpaid (\$0) classes Select Include Subordinates, Pre-Approved and Register Upon Approval (all three boxes)
- d. Classes with a cost Select Include Subordinates and Pre-Approved (first two boxes)
- e. Select Next to proceed.



- 12. Pricing Enter the session price
- **13. Training Units** The system **will** default to "Allow usersvalue". Do not change default. Select **Next** to proceed.
- **14. Summary** Summary of the session. Select **Save** to save any changes that were made.
- **15.** The session will be in a **Tentative** status. After approval by the system administrator, the status will be **Approved.**

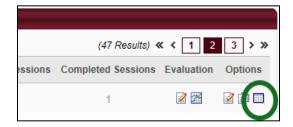


Copy a Session

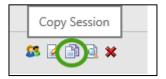
After creating and saving a session you can use the copy feature to add new sessions with similar information. This feature is useful if you need to create a session that is identical to previous sessions other than date, time and/or location.

Note: If the <u>event content</u> or <u>session length</u> change, a new event and session(s) <u>must be created</u> since you will impact the training details information for users who have already completed the previous event/session.

- 1. Hover over the **ILT** tab and select **Manage Events & Sessions**. A list of your events will appear on the page.
- 2. Find your event and select View Sessions.



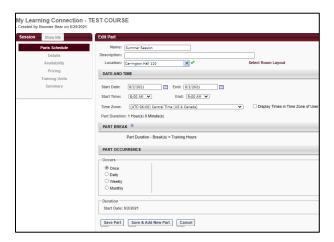
3. Find the session you want to copy and select Copy Session.



4. The Parts Schedule will open. Select the Edit icon to the right of the part.



5. You will be redirected to the Edit Part screen to edit the name, location, date, time and instructor for the session part as needed. To add a Part Break, select the blue plus sign. After you have finished editing, select Save Part at the bottom of your screen.



6. You will be returned to the **Parts Schedule** screen where you can view your edited session part information. When everything is correct, select **Save**.



7. The session will be in a **Tentative** status. After approval by the system administrator, the status will be **Approved.**

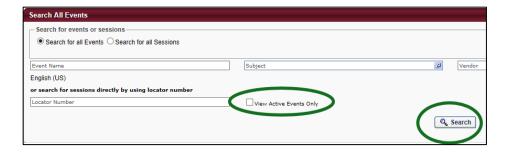


How do I view my sessions and print sign-in sheets?

1. Hover over the ILT tab and select Manage Events and Sessions.

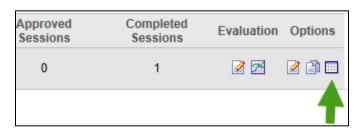


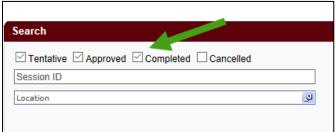
2. You will be redirected to the **Manage Events and Sessions** page. A list of the active events offered by your department will appear. To include inactive events, uncheck the **View Active Events Only** box and select **Search**.



3. Select View Sessions to the right of the event of your choice. A list of sessions under the event will open.

Note: To find a session that has already occurred, select the **Completed** box on the session page and select **Search** to pull up a list of completed sessions under the event.





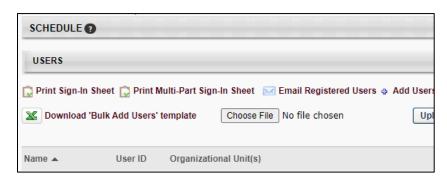
4. Select View Roster



- 5. You will be redirected to the **Session Roster** page.
- 6. Session with one part Select Print Sign-In Sheet.

Session with multiple parts -

- Select Print Sign-In Sheet to generate a sign in sheet just for the session you are in.
- Select Print Multi-Part Sign-In Sheet to generate a sign-in sheet with all parts listed and a signature line for each part.



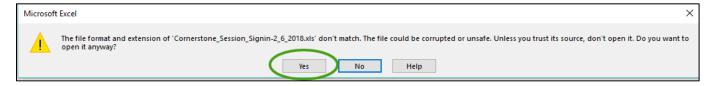
7. Save the document by selecting **Save As**, moving the file to the correct destination and changing the file name.



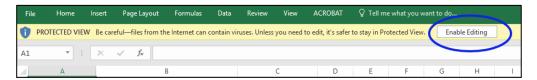
7. Select Open.



8. If you get an alert from Excel about the file format, select Yes to open the file.



9. When you open the file, a "PROTECTED VIEW" message will appear. Select **Enable Editing** to allow you to edit your sign-in sheet.

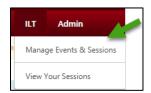


- 10. Tips for editing your sign-in sheet
 - a. Edit the title and session details Use bold, enlarge and/or delete in any of the fields.
 - b. Reduce or enlarge some of the rows or columns Hover over the line between any two columns or rows until the black double arrow appears, and then simply drag the row or column to the desired size. Reduce the size of the User ID column and enlarge the size of the signature column to allow more room for participants to sign their names.
 - **c.** Change the orientation of the sign-in sheet Page Layout>Orientation>Landscape. Changing the orientation to landscape will allow you to make the columns larger while still fitting them on the page.
 - **d. Change the row height** Format>Row Height. A good size for the sign-in portion itself is around 40. Be sure and highlight the rows you want to change first.
- 11. When you are done editing, save your file as a PDF or Excel file and save it to your computer.

How do I cancel a session?

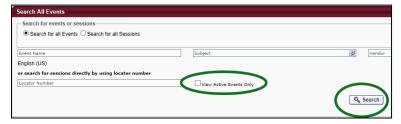
Note: Session cancellation will automatically withdraw the participants. To cancel sessions with a cost contact HRLearning@missouristate.edu to ensure that the participants receive the appropriate refund.

1. Hover over the ILT tab and select Manage Events and Sessions.

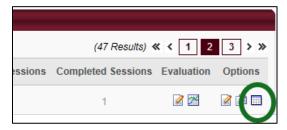


2. You will be redirected the **Manage Events and Sessions** page that includes a list of active events offered by your department.

To view all events, both active and inactive, unselect the **View Active Events Only** box and select **Search**.



3. Select View Sessions to the right of the event of your choice. A list of sessions under the event will open.



4. Select the **X** next to the session you want to cancel.



5. Select a reason for the cancellation in the dropdown box and add **Additional Comments** if necessary. Select **Submit** when complete. In \$0 sessions, cancellation of a session will automatically withdraw users.

How do I check the waitlist on a session?

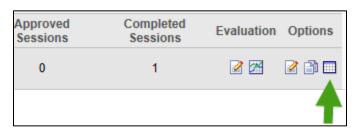
1. Hover over the ILT tab and select Manage Events and Sessions.



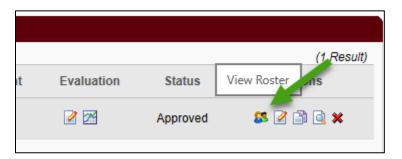
2. You will be redirected the **Manage Events and Sessions** page that includes a list of active events offered by your department. To view all events, both active and inactive, unselect the **View Active Events Only** box and select **Search**.



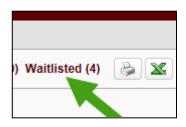
3. Select View Sessions to the right of the event of your choice. A list of sessions under the event will open.



4. Select View Roster.



5. The Session Roster will open. Select Waitlist to open, print, or export to Excel.



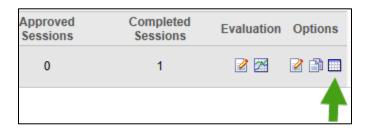
How do I email participants using My Learning Connection?

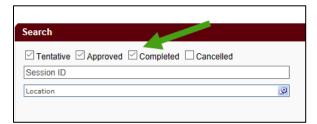
1. Hover over the **ILT** tab and select **Manage Events and Sessions**. A list of your events will appear on the page.



2. Select View Sessions to the right of the event. A list of sessions under the event will open.

Note: To find a session that has already occurred, select the **Completed** box on the **Sessions** page and select **Search** to pull up a list of completed sessions under the event.





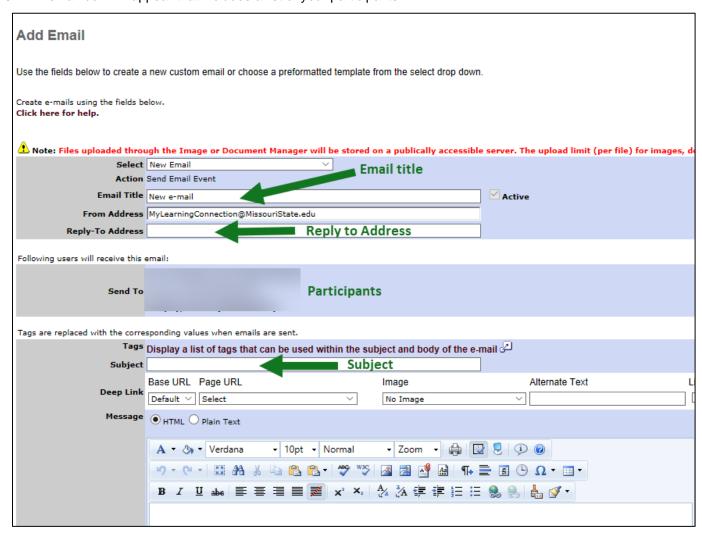
3. Select View Roster.



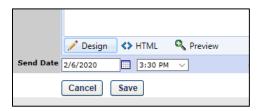
- 4. You will be redirected to the **Session Roster** page for a list of people who are registered for the session.
- 5. Select Email Registered Users.



6. An email box will appear that includes a list of your participants.



7. A date and time to send the email can be included in the lower left corner of the email screen.



8. Complete the e-mail and select **Save** to send the email to the participants.

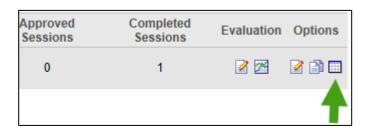
How do I manage rosters and mark attendance?

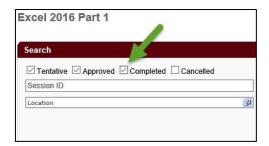
1. Hover over the **ILT** tab and select **Manage Events and Sessions**. Enter the name of your event in the **Event Name** field.



2. Select View Sessions to the right of the event. A list of sessions under the event will open.

Note: To find a session that has already occurred, select the **Completed** box on the **Sessions** page and select **Search** to pull up a list of completed sessions under the event.





3. Select View Roster.

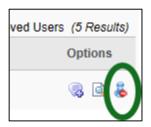


- 4. You will be redirected to the Session Roster page for a list of everyone who is registered for the session.
- **5.** Select the print or excel icon in the top right corner of the screen to print or save the roster.



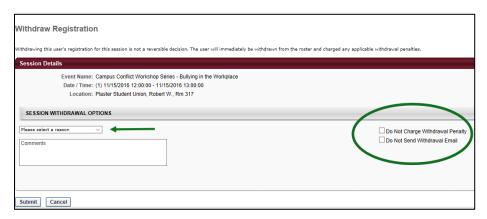
To remove a user

1. Select Remove Users (on the right) of the user you would like to remove.



2. Enter a reason for withdrawal by selecting from the dropdown. If you do not wish to notify the user of withdrawal, select **Do Not Send Withdrawal Email**. When you are finished, select **Submit**.

Note: Withdrawing a user from a session with a charge (paid on account and/or training units) - Contact <u>HRLearning@MissouriState.edu</u> to ensure that the user receives a refund.



To add a user

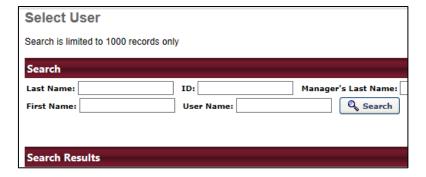
Users can be added individually by selecting Add Users or with the 'Bulk Add Users' template.

Add users individually

1. Select Add Users.



2. A new window will open that will allow you to search for and add one or multiple users. When finished, select **Done** at the bottom of the window.



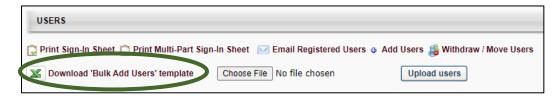
3. Select Add Pending Users to Roster to add the selected user(s). If you do not want to notify the user(s), uncheck the Send emails box.

Note: If there is a cost for the class, the user will need to open **My Transcript** in **My Learning Connection** to complete the registration. When completed, the user will appear on the roster.



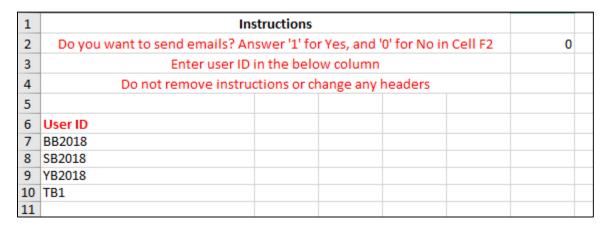
Add Several Users at Once

1. Select Download 'Bulk Add Users' template



The template can only be used for sessions with active events. A maximum of 100 users can be included.

2. Indicate at the top of the document if you want to send emails by answering the question.



- 3. Add the User ID's to the template. Save the document to your computer as an excel file and close it.
- 4. Select Choose File (the file you saved).
- 5. Select Upload users.

Marking Attendance & Roster Submission

1. When all additions and withdrawals are completed, the attendance can be marked. From the Session Roster page, select the Attendance and Scoring tab.



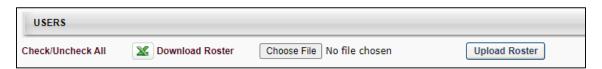
Attendance can be recorded directly on the **Attendance and Scoring** tab or by using the **Download Roster** (Bulk Update Attendance & Scoring) function.

Record attendance directly on the Attendance & Scoring tab

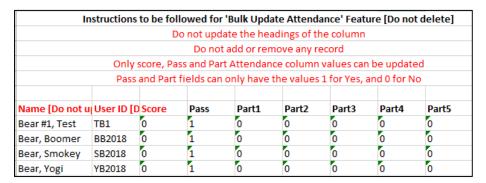
 Select the box under Attendance for each user that attended. One option is to select Check/Uncheck All. When finished, select Submit Roster.



Record attendance using the Bulk Update Attendance function



1. Select Download Roster.



- 2. Add Score, Pass, and or Part Attendance information. Only Part Attendance will show users as attended or not attended. Pass and Score have no impact on attendance information. Use 1 for Yes and 0 for No.
- 3. Save the document to your computer as an excel file and close it.
- 4. Select Choose File (the file you saved).
- 5. Select Upload Roster.
- 6. Select **Submit Roster** at the bottom of the page.

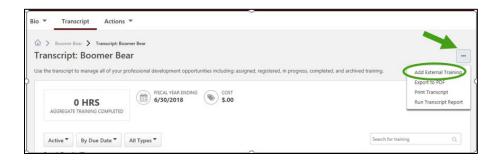
How do I add external training to my transcript?

The addition of external training is a process for employees to update their learning transcript by documenting training that is not available within My Learning Connection.

1. From the Welcome page, select the My Transcript icon.



2. Select the 3 dots icon on the right side of screen and a drop down list will appear. Select **Add External Training**.



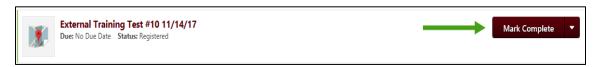
3. A new page, **Add External Training** will appear. Complete the fields. The fields with a red * are required. Supporting documentation is not required, but can be included. Examples include a certificate or agenda.

To add supporting documentation, select **Select a file** to access it on your computer. Each attachment can be up to 1 MB in size, and a maximum of 15 attachments can be added to an external training. They are limited to ppt, pptx, doc, docx, pdf, jpg, jpeg, jpe, png, txt, gif, xls, xlsx, and rtf file types.

After completion, select Submit.



4. Return to your transcript and select Mark Complete.



5. The status of the external training request will change to **Pending Completion Approval**. An e-mail will automatically be sent to your supervisor advising them to approve the training.



6. After approval, your training will appear as completed on your transcript. To view your approved, completed training, select the drop down arrow next to **Active** and select **Completed**.



7. If approved, the training will appear as **Completed** on your transcript.



8. If not approved, the training will appear as Completion Approval Denied on your transcript.



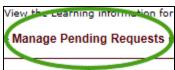
How do I approve an external training?

Supervisors will be notified that external training approval is needed with an email that is automatically generated by My Learning Connection. A sample is at the end of this user guide.

 Hover the Learning tab and select Manage Employee Learning.

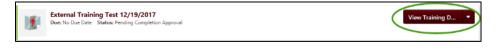


- 2. Select Manage Pending Requests.
- Select the users name (on the left) to see more information about the training on their transcript.





4. Locate the training on the transcript and select **View Training Details** to see details including supporting documents (i.e. certificate, registration, agenda, etc.).





5. Go back to the **Training Pending Approval** screen and select the **GREEN** √ to approve or **RED** X to disapprove the training.



Notification Email to Supervisors

External Training Approval Required

From: MyLearningConnection@missouristate.edu

Reply-To-Address: <u>HRLearning@missouristate.edu</u>

Subject: A user has created an external training for your approval

My Learning Connection features include a process for employees to update their learning transcript by documenting external training conducted outside of the Organizational & Talent Development office. Please contact your employee for specific questions or more information about their external training.

TRAINEE.FIRST.NAME TRAINEE.LAST.NAME has completed an external training. Approval is requested for completion of this external training.

To review and approve the training-

- Log into My Missouri State
- Select the Profile tab
- Select My Learning Connection under Professional Development

From your My Learning Connection welcome page-

- Hover over the Learning tab and select Manage Employee Learning
- Select Manage Pending Requests
- Select the users name (on the left) to see the training on their transcript
- Locate the training on the transcript and select View Training Details (on the right) to see details
- Go back to your approval screen and select the **GREEN** $\sqrt{}$ to approve or **RED** X to disapprove the training.

Thank you,

Organizational & Talent Development
Office of Human Resources
417-836-7683 HRLearning@missouristate.edu