WASHINGTON STATE UNIVERSITY

# WSU ONLINE TRAINING

# Manager's Guide

## Assigning courses and executing activity reports

February 2017

SkillPort 8i

# CONTENTS

# Introduction

This step-by-step guide introduces the key functions available to designated WSU Online Learning Managers. These functions help managers meet training and professional development needs as they arise within the college, area or department.

Additional help is available through the following resources:

**WSU Resources**:

- Human Resource Services
  hrstraining@wsu.edu
  (509) 335-4521
- HRS Employee Training and Development
  http://hrs.wsu.edu/Train

**SkillSoft Resources**:

- SkillPort Home Page (http://hrs.wsu.edu/skillsoft)
  - Select "Quick Links" in the upper left corner of your home page; then select Management
  - Then select "Help" at the top right of the window
- Browser diagnostic tool: http://browser.skillport.com

# Locating Courses

Effective training management requires familiarity in finding appropriate learning resources.  A variety of methods can help:

## 1) Search Box

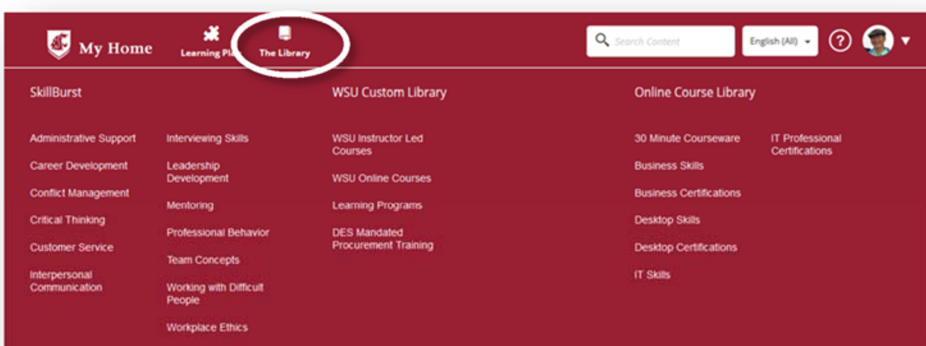
Log into your training account home page at [http://hrs.wsu.edu/skillsoft](http://hrs.wsu.edu/skillsoft)

The **Search Box** is available near the top right of virtually every page of the WSU Online Training System. Simply enter the search criteria into the **Search Content** field and click the search button.


Modify the search language with the control to the right of the **Search Content** field.  This impacts the language used for the site but not for the actual courses or books.

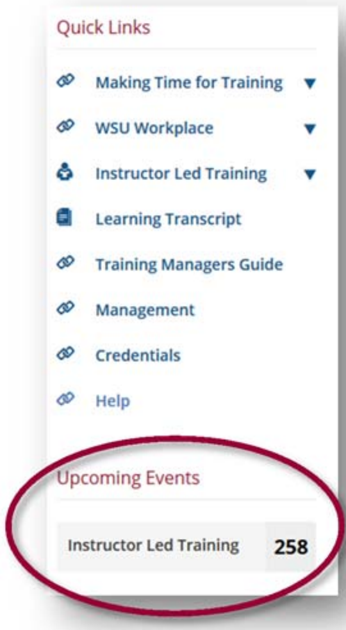
## 2) The Library

Also available on virtually every page is the link to browse **The Library:**




Select any library category to access online courses within that general topic. Additional filters and search tools become available on the resulting pages to help you narrow the search even further.

## 3) Instructor Led Training Sessions

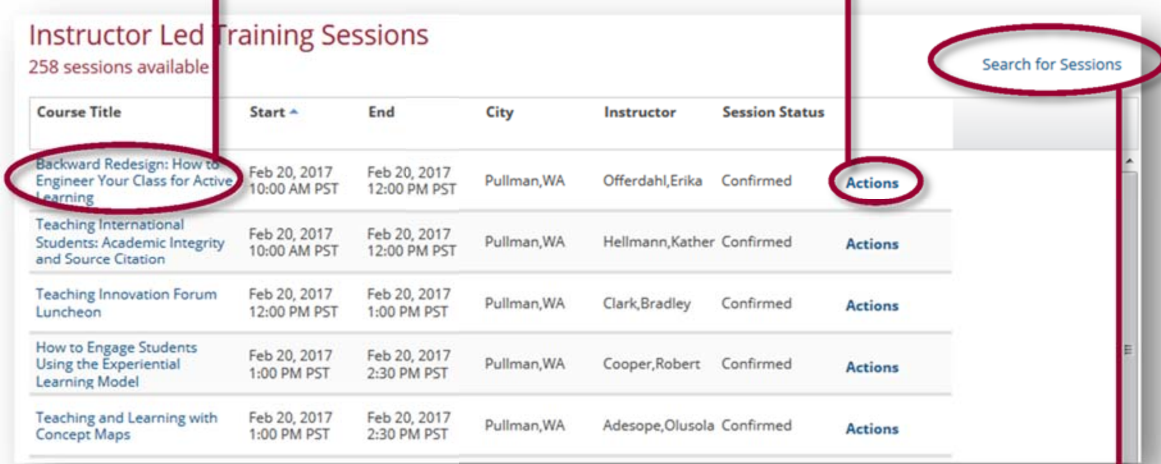



Also available on your home page is access to the Instructor Led Training schedule. Click on the link to display all the live training courses currently on the schedule.

By default, the sessions are listed alphabetically by course title. Click on the **Start** and **End** column headings to sort by date.

Clicking on the **Course Title** opens a new window with the course description and another view of the schedule.

Click on the **Actions** link to view session details, enroll yourself in the session, or to save the session to your Learning Plan.




The **Search for Sessions** link at the upper right corner of the schedule enables you to locate sessions based on course title criteria.

# Management Functions

Two primary Administrative Functions are available to designated training managers:

## 1) Assign Courses

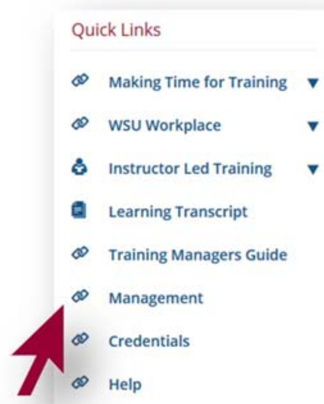
- Use the "**Learning Plan Assignment**" function to establish training goals for employees or groups within your management areas.

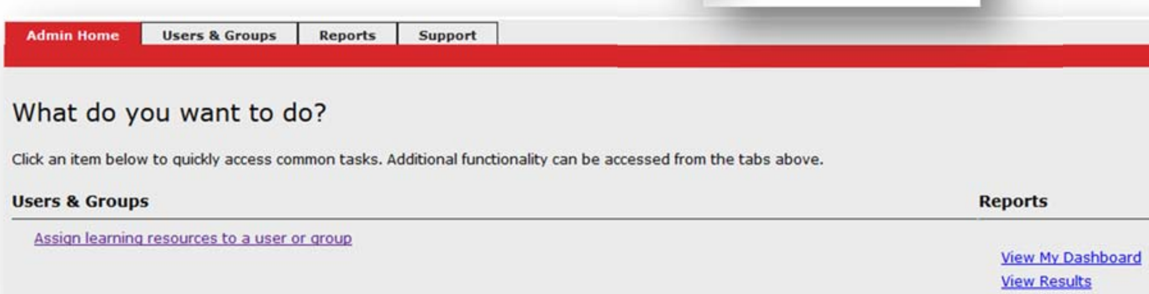
## 2) Monitor Training Progress

- Use the "**Reports** "function to review the training activity of employees or groups within your management areas.

### Accessing the Management Functions

1. Log into your home page (http://hrs.wsu.edu/skillsoft)
2. From the Quick Links menu on the left, select **Management**.
3. The resulting page provides access to the management functions described above.



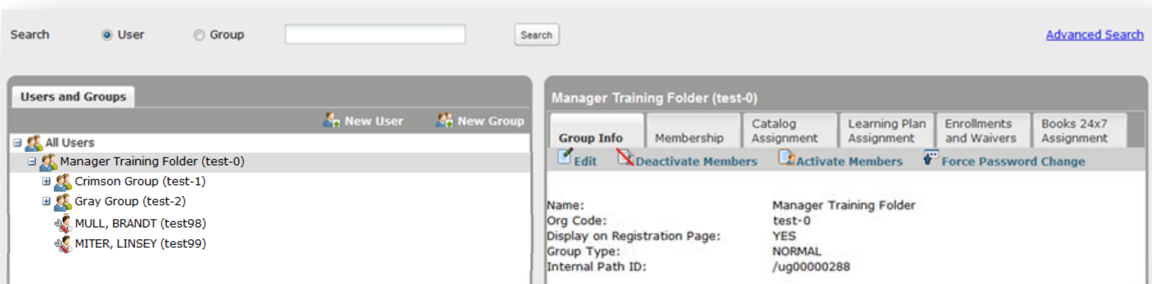

**Note:** If the **Management** shortcut is not visible, complete the *WSU Online Training Management Authorization Form* *included in the Appendix of this guide and submit to HRS.*

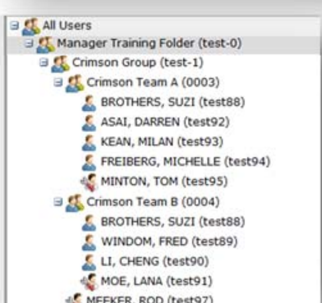
# Assigning Courses

1) At the Management page, click **Assign learning resources to a user or group:**


2) The **Users and Groups** view opens to provide access to all training accounts in your management area. Your management area includes:
   a. All employees who share the same organizational Home Department or Appointing Department number
   b. All organizational sub-groups who report to your organizational group
   (*contact [hrstraining@wsu.edu](mailto:hrstraining@wsu.edu) if you require assistance in determining your management area*)

   The example below illustrates a test group (Manager Training Folder) in which Brandt Mull and Linsey Miter are the managers. Within this organizational group are two sub-groups (Crimson Group and Gray Group). The two managers are able to manage the accounts of all individuals in each of these groups.



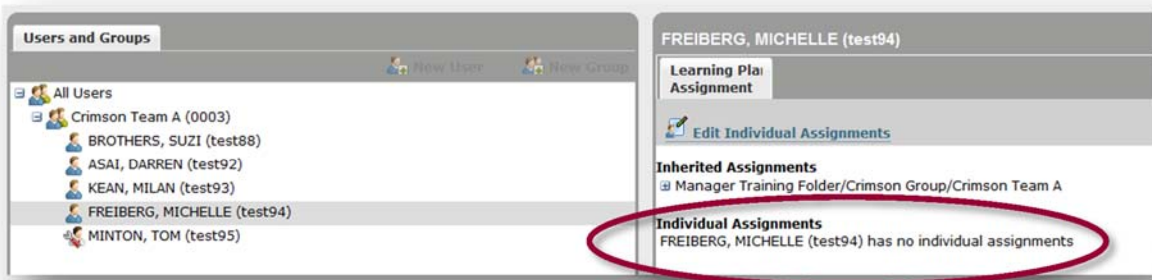




Expanding the Crimson Group reveals two further sub-groups (Crimson Team A and Crimson Team B). Manager Tom Minton can manage all the employees in Team A, and Manager Lana Moe can manage the employees in Team B.

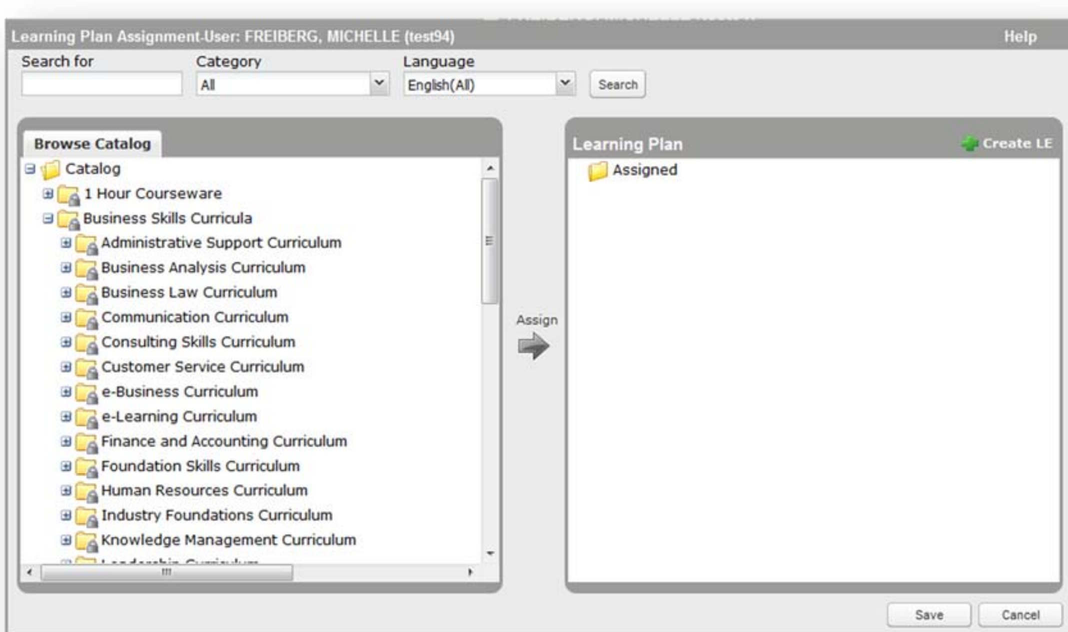
However, Crimson Group manager Rod Meeker can manage all Team A and Team B employees.

3. Within the **Users and Groups** area, expand the available folders or use the search function at the top of the page to locate the particular user or group to which you plan to assign courses.

4. In the example below, manager Tom Minton has accessed employee Michelle Freiberg's account. Clicking once on her name in the left pane reveals her assignments in the right pane. Currently, she has no individual assignments:

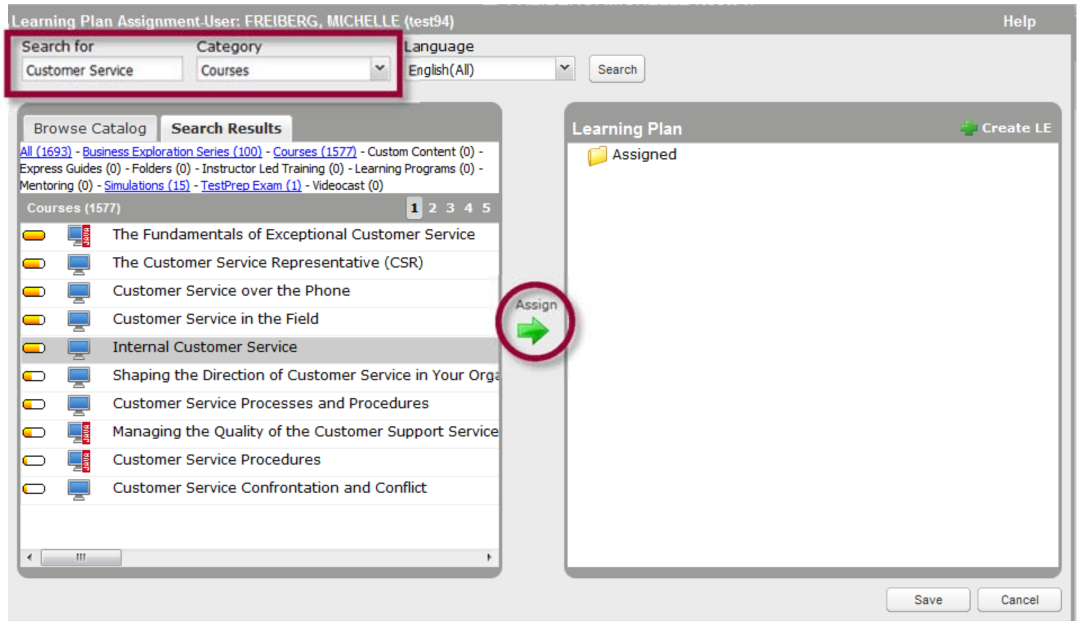



5. Click the **Edit Individual Assignments** link near the top of the right-hand pane to reveal the window illustrated below:



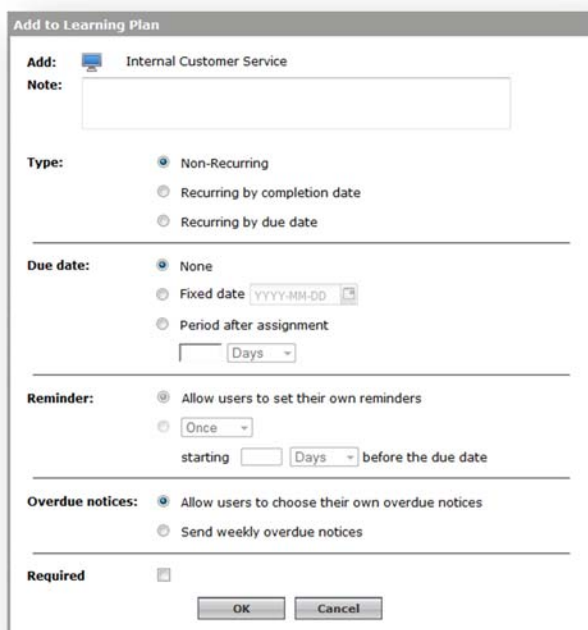

All the learning assets included in the training system are now accessible for assignment through the left-hand pane.

In the illustration on the next page you can see the manager entered the phrase "Customer Service" into the **Search for** box at the top left of the window. He also changed the category to **Courses.** Clicking on the **Search** button reveals the appropriate selections.




The manager then clicked once on the ***Internal Customer Service*** title to select it for assignment. Then he clicked on the green **Assign** arrow in the center of the window. The **Assignment Customization** window appears:

6. Modify the assignment as desired:




**Note:** Will appear in the employee's Learning Plan assignment.

**Type:** Use recurring only if the assignment needs to be completed repeatedly in the future.

**Due Date:** Identify how much time the employee has to complete the assignment.

**Reminder:** Sets parameters for email reminders of the assignment.

**Overdue Notice:** Sets parameters for email notices if the assignment has not been completed by the due date.

**Required:** Identifies if the assignment is required or optional.

7) Click **Save** to enable the assignment and send an automatic email to the email.

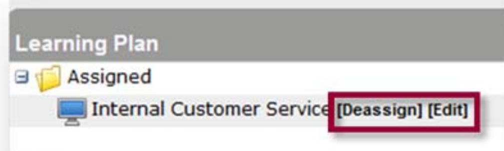
8) This returns you again to the previous window where you selected the course for assignment. Click **Save** to confirm the action.

9) If you need to subsequently modify the assignment, access the employee's account as you did when initially making the assignment

   Once again, click **Edit Individual Assignments**

   In the Learning Plan window pane, rest your cursor on the assignment you wish to modify.

   The **Deassign** and the **Edit** links associated with the assignment appear.




10) <u>**Email Notifications**</u>

   Be aware that all assign, deassign and edit actions automatically generate email notifications to the employee. The return address of the automatic training notification is <hrstraining@wsu.edu> and not your WSU email account.

   Prior to assigning courses in this training system, HRS recommends you inform your employees that about your intent to assign courses and about the automatic notification feature. Consider the sample email recommendation below:

**Training Notification Clarification**

*RE: Training*

*I will periodically assign SkillSoft training courses to you. Please note when I assign courses SkillSoft will automatically generate an email message to you that looks like: (provide sample).*

*There are two things to be aware of:*

1) *Although the return email address of hrstraining@wsu.edu will be included in the automatic messages, the assignments will actually be coming from me.*

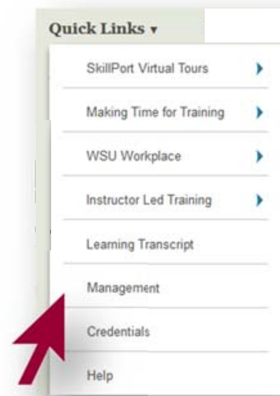
2) *The automatic email messages include the statement, "If you have questions, please contact your training manager." Please refer any question/concerns directly to me.*

   *WSU's Online Training System (http://hrs.wsu.edu/skillsoft) provides many opportunities to assist us with accomplishing our departmental goals. Please contact me with any questions.*

# Managing Reports

WSU's Online Training System includes a variety of reports that allows you to track and analyze training progress and content usage by your employees. As with Learning Plan Assignments, you are allowed to view the training activity of only those employees within your management view (see page 5).

## Accessing the Management Functions



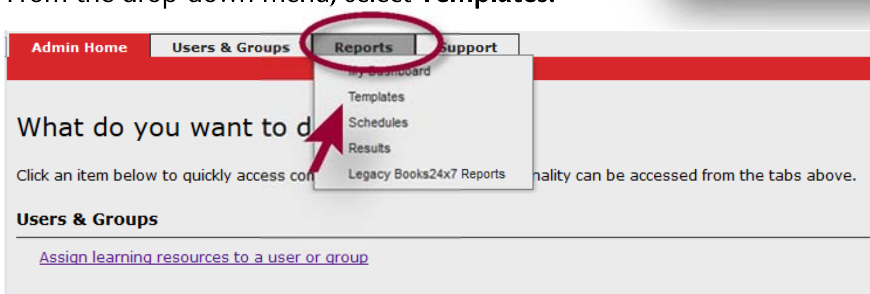

1. Log into your home page ([http://hrs.wsu.edu/skillsoft](http://hrs.wsu.edu/skillsoft))

2. Select the **Quick Links** shortcut at the upper left corner of your home page.

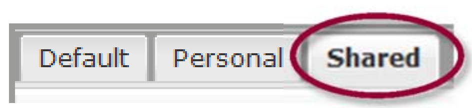
3. From the Quick Links menu, select **Management**.

4. On the resulting page, select the **Reports** tab.

    a. From the drop-down menu, select **Templates:**

    b. Within the Templates window, click on the **Shared** tab to access pre-built report templates.

    The **Shared** tab contains custom reports designed to satisfy the requests of most WSU Online Training Mangers.

    The following pages outline the steps for using each of the shared reports.

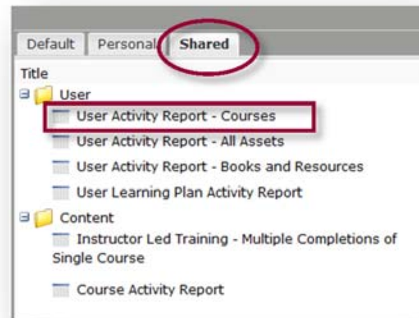
**Note:** Many more report templates are available in the **Default** tab.

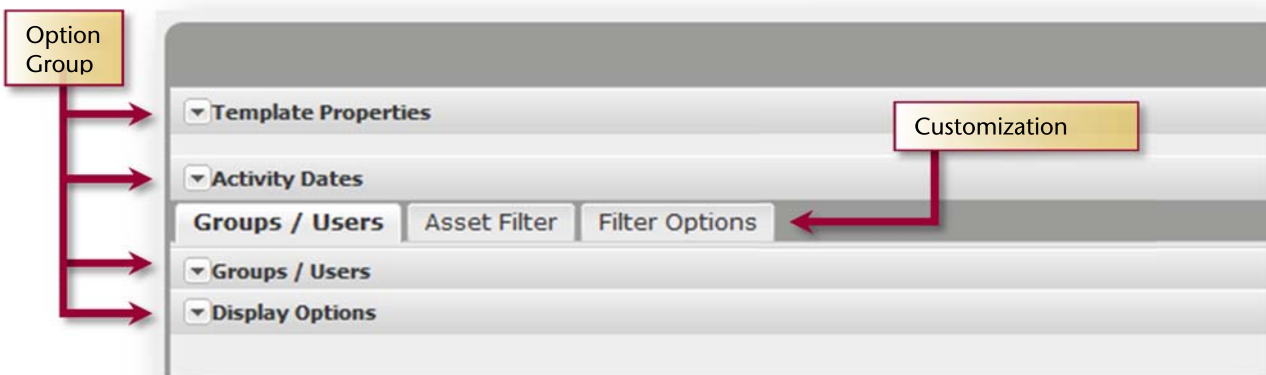
Contact HRS ([hrs.training@wsu.edu](mailto:hrs.training@wsu.edu), 509-335-4521) for assistance.

## User Activity Report - Courses

This report allows you to view detailed information of training activity by a particular employee, multiple employees, or whole departments within your management view. This report is filtered to show activity in online and Instructor Led courses only.

- Within the Shared Templates tab, expand the "User" folder and select **User Activity Report - Courses**.
- After selecting the report, click on **Edit** in the upper right corner of the page.
- The **Report Properties** window opens (see below). Note the four expandable option groups and the three customizaton tabs:




- **Template Properties:** A read only list of information about the report
- **Activity Dates:** Specifies what period in time the report should include
- **Groups / Users:** Returns data only for the selected groups or users
- **Display Options:** Determines what column headers the report will include, and how the data will display
- **Asset Filter:** Returns data only for the selected asset types
- **Filter Options:** A variety of filters for selecting criteria such as assignment and access dates, specific employee and group information, completion status, etc.

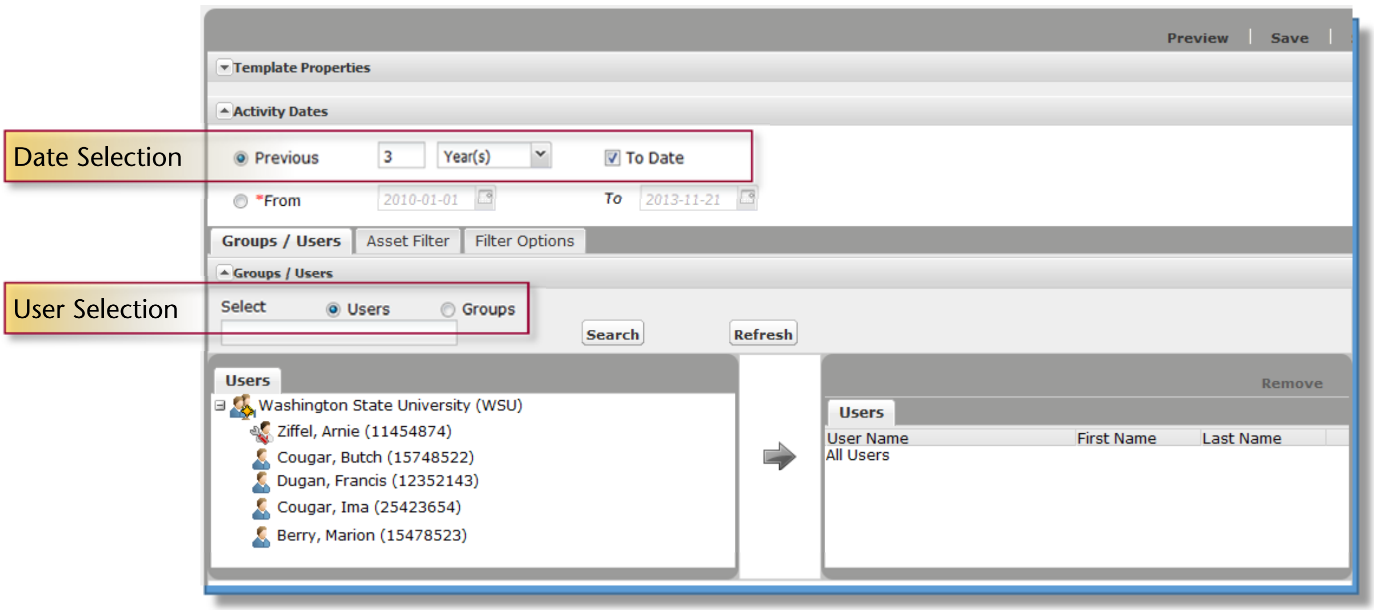
## User Activity Report - Courses (continued)

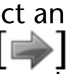
- Expand the **Activity Dates** and **Groups** / **Users** options and make the desired selections.

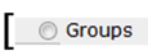
- In the example below, the report has been configured to return data for:

  - The last three years (date selection), and

  - For specified users (user selection). In this example, the specific users have not yet been identified.




  - To select an employee for the report, click on the name and then click on the arrow [] between the two panes . If you wish to select more than one employee, hold the Ctrl key while clicking on additional names.

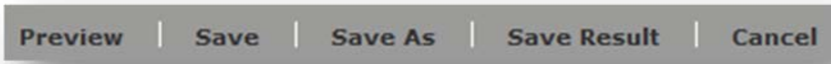
  - To select an entire group (department), click the **Groups** radio button [] in the User Selection highlighted above. Then click on the desired department name(s) in the left-hand pane and move them to the right-hand pane just as you would when selecting individual employees.

- The next option group – **Display Options** – lists numerous fields that will appear as column headers in the report results. Those fields generally considered the most useful have been selected for you, although you can modify these selections if you wish.

- The last area to consider in this report is the **Asset Filter** customization tab. In this area you can identify the types of learning assets that will be included in the report. Again, the most common fields have been selected for you, but you can modify these as well.

## User Activity Report - Courses (continued)

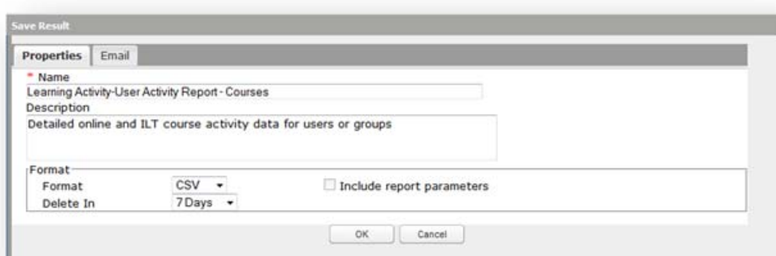
- At this point all necessary parameters are configured and the report can be executed. The controls in the upper right corner of the Report page provide many options:




  - **Preview:** Displays the results of the report
  - **Save:** Saves the report structure in your **Personal** templates section for future use
  - **Save As:** Saves a copy of the report and allows you to rename it for future use
    - *Example: Perhaps you designed a report to focus specifically on the activity of one department in your management focus. You might save that report as "Course Activity – Department X." Then, you may customize the report to focus on another department save it as "Course Activity – Department Y," and so on. These reports will return updated data on each department each time they are executed.*
  - **Save Result*:** Although you can see the resulting data with the Preview control described above, a data snapshot is not actually created for future analysis until you use this function. When doing so, you are presented with formatting and auto-deletion options.
  - **Cancel:** Cancels any customizations you may have made to the original report.

* If you select **Save Result**, a dialogue box appears:

Modify the Name, Description, and/or Format if you wish and then click OK. The report results will be saved for the period of time you designate.




Up until that time expires, you can access the results by clicking on the **Reports** tab and then selecting **Results**.

The **Email** tab allows you to designate specific users who will receive a copy of the results.

## User Activity Report – Books and Resources

This report is identical to the ***User Activity Report – Courses*** in every respect except it will return results on user activity in Books and other online resources.

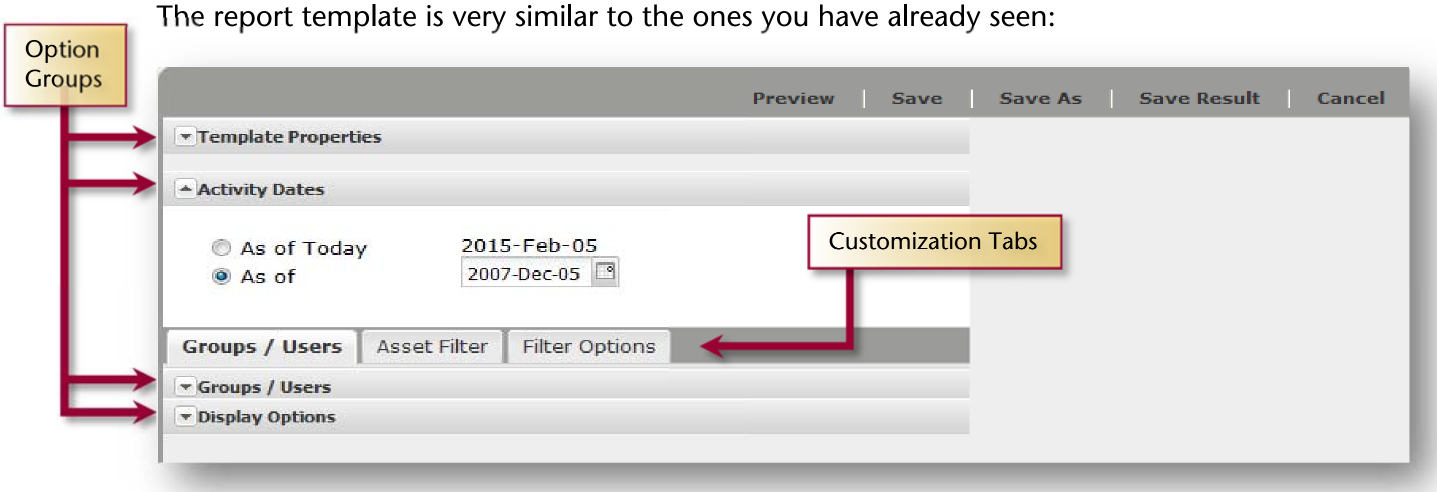
## User Activity Report – All Assets

This report is identical to the two previous reports in every respect except it will return results on user activity in all learning assets within the training system. This includes online courses, ILT courses, books and other resources.

## User Learning Plan Activity Report

This report provides activity data specifically on items that were placed in the users Learning Plan. Some of these may have been assigned by you or another manager, other may have been placed there by the user herself.

The report template is very similar to the ones you have already seen:



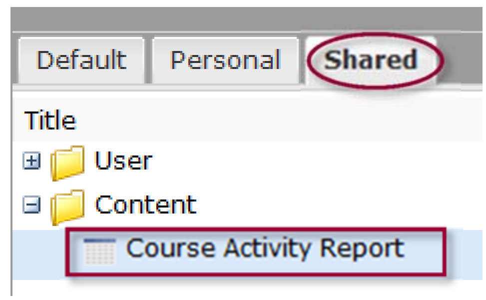

Identify the activity date, the user(s) or group(s) upon which you wish to report, and the display options. The asset filter has been predetermined to return only online course and Instructor Led Training course activity, but you can modify this in the Asset Filter tab.

# Course Activity Report

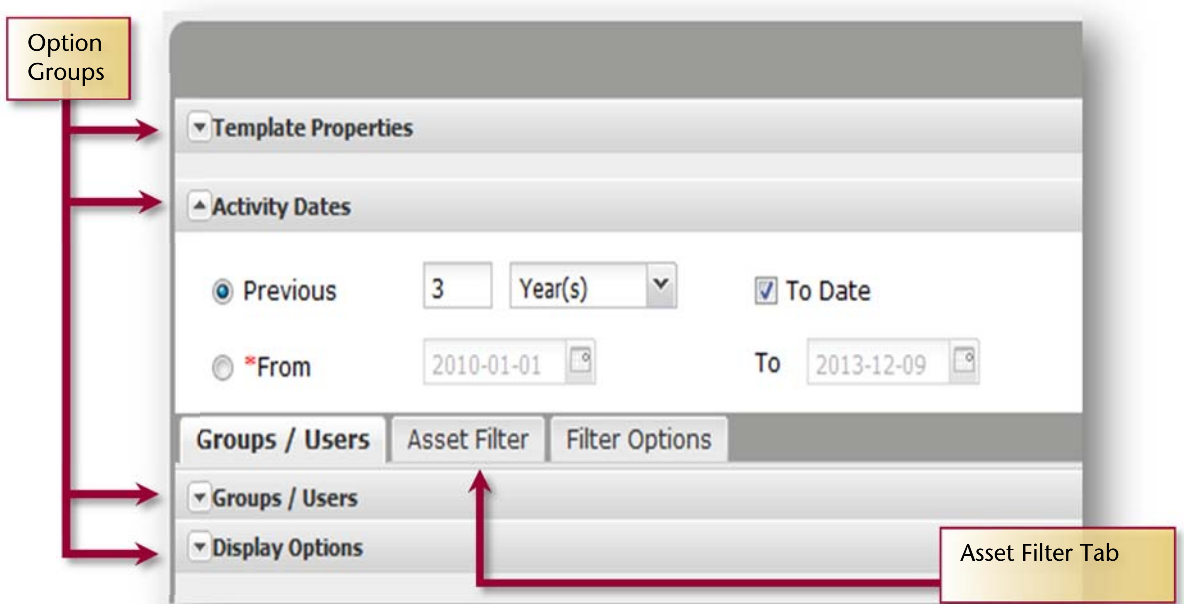
This report allows you to view activity that has occurred within specifed courses. Resulting date can include which empolyees accessed an asset, if they completed it, and what score they received. The report also includes the date they accessed the asset, how many times they accessed it, and how much time they spent in it.

- Within the Shared Templates tab, expand the "Content" folder and select the **Course Activity Report**.

- After selecting the report, click on **Edit** in the upper right corner of the page.



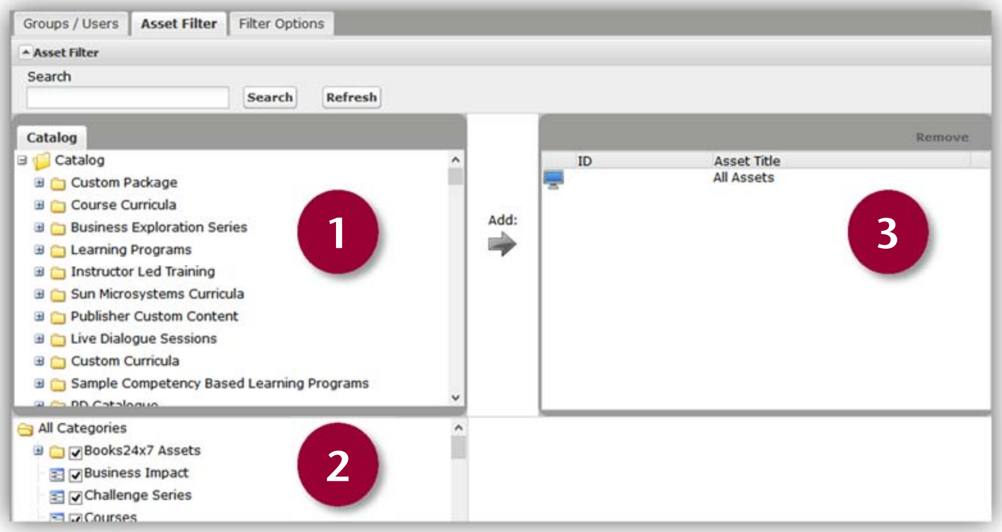

- Just as with the User Activity Reports, the **Report Properties** window opens (see below).




- The most common parameters have already been selected for you. However, you may expand each Option Group and customize further as desired.

- Click on the **Asset Filter** tab. In this area you can identify the specific course(s) upon which you wish to view user activity. The next page illustrates the steps.

## Course Activity Report (continued)



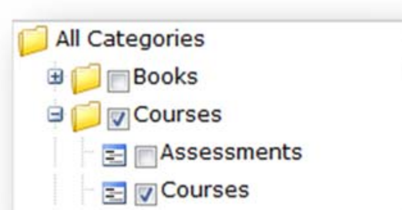

The **Asset Filter** includes the following sections:

1 **Asset Selector**
Locate and highlight the specific assets (such as certain course titles) contained in the Course Catalog.  As described in the section **Locating Courses** (p. 2), you can find the course(s) you wish to include in a report by using the Search function above this area or by navigating through the catalog folders and subfolders.

2 **Category Selector**
Specify the asset categories you wish to include in your report.

- If you wish to run the report on specific courses, find them in the **Asset Selector** and then move them to the **Selected Assets** pane using the **Add arrow**: 

- Alternately, you may designate only certain asset categories, such as Courses, to be included in the results by chedking the appropriate box(es) in the **Category Selector**.




3 **Selected Assets**
Displays the assets you have selected in areas 1 and 2 for inclusion in the report.

Preview or save the report and results with the usual controls in the upper right corner of the window.

# Instructor Led Training – Multiple Completions of Single Course

Throughout the reporting system, multiple completions of Online Course completions will be displayed in the reports as separate completions. That is, if a user completes a specific Online Course three different times, there will appear three different records of completion in that user's history.

Multiple Instructor Led Training completions are managed differently. In the reports previously described, multiple ILT completions are compressed into a single record which includes the date of the very last completion and the number of times the user accessed the courses. This may not be particularly helpful if you are trying to review a user's history in compliance training issues.

This particular report solves the problem by listing all the completions separately and thus allowing you to review the specific completions dates over a period of time.

**Note: This ability to view multiple completions was implemented February 16, 2015. Multiple completions prior to that time will be compressed into one record.**

# Appendix

Online Training
Management Authorization Form

Training Time Reminder

Contact HRS to arrange a demonstration of these resources for your department:

hrstraining@wsu.edu

509-335-4521

Human Resource Services
Training and Development

# WSU Online Training Management Authorization Form

This form is to authorize access to manage and assign online learning resources. Approval for this authorization must be signed off by the appointing authority for the area. Questions regarding this form may be directed to HRS Training and Development at 509-335-4521 or hrstraining@wsu.edu

**Return completed form to HRS Training and Development Campus Zip 1014**

| | | |
|---|---|---|
| Name of Employee who is to be allowed access | WSU ID | Phone |
| Position Title | Email Address | |
| Name of Organizational Unit | WSUORG Code | Campus Zip |

Employee(s) whose accounts will be accessible by this person (attach additional pages if needed)

| Name: | Position Title: | WSU ID : |
|---|---|---|
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| | | |
| | | |
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| | | |
|---|---|---|
| Employee to contact with questions about this request | Phone | Email |
| Effective date requested | Date prepared | |

| | |
|---|---|
| Appointing Authority Signature | Date |
| Print Name | Title |

HRS created: 11/05

Human Resource Services
Training and Development

# E-Learning Appropriate Use Reminder

All university employees are encouraged to take courses through WSU's Online Learning Resources System.

If courses are required, supervisors and employees should work together to develop a training development plan. The plan should include times when the employee can focus on the training.

A few items to keep in mind:

- Required, mandated and encouraged training time may be considered hours worked and may count towards the 96 hours of release time.
- Employees taking an initiative to take E-Learning courses on their own must keep in mind the State Ethics rules regarding appropriate use of state resources, including time. Refer to: Use of University Property BPPM 20.35; Personal Use of University Resources BPPM 20.37; RCW 42.52.160, Use of Persons, Money, or Property for Personal Gain.
- All employees who are eligible to claim overtime must receive prior approval before taking E-Learning courses that are directly related to their position with WSU. Refer to BPPM 60.58 Overtime Eligible Employees.

Courses taken for personal development, not related to the employee's position with WSU, can be done on the employee's own time using non-university resources. NOTE: personal use of the Online Learning Resources cannot be done using university resources including time and cannot interfere with normal work assignments.

Inappropriate use of the WSU's Online Learning Resources or the use of time may result in corrective or disciplinary action.

Questions regarding overtime (Fair Labor Standards Act) and work vs. non-work time should be directed to Human Resource Services.

Human Resource Services Contacts:
http://www.hrs.wsu.edu/HRS+Contacts