WSU Online Learning System Manager Guide

Assigning courses and executing activity reports

Updated May 2020

Skillport 8i

CONTENTS

Introduction

This step-by-step guide introduces the key functions available to designated WSU Online Learning Managers. These functions help these Managers meet learning 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 (HRS)
  hrs@wsu.edu
  509-335-4521
  hrs.wsu.edu

- HRS Learning and Organizational Development
  hrstraining@wsu.edu
  hrs.wsu.edu/training

Skillsoft Resources:

- Skillport Home Page ihr.hrs.wsu.edu/skillsoft
  - Select Management from Quick Links in the upper left corner of the home page
  - Select Help at the top right of the page
- Skillsoft Customer Support: support.skillsoft.com

Getting Started

Log in to your Online Learning Account home page at ihr.hrs.wsu.edu/skillsoft.

Locating Learning Content

Search Content

Enter the search criteria into the Search Content field near the top right of virtually every page and click the search button.

Search Content Language

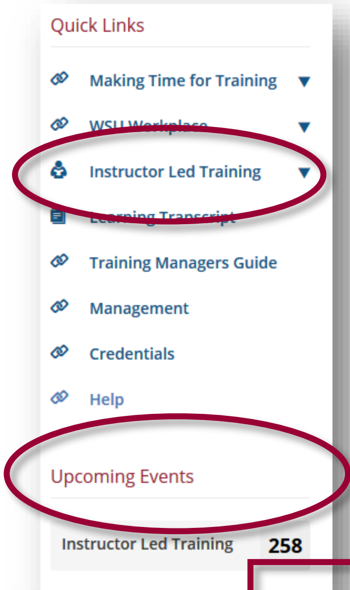
To search for content in French, German or Spanish, select the chosen language from the box to the right of the Search Content field. If no languages appear, select Manage Language from the drop down and change default language in Content Language field.

Content available may differ based on chosen language.

The Library

Select a Library category to access Instructor-Led Training (ILT) and online courses within that general topic. Additional filters and search tools become available on the resulting pages to narrow the search further.

ILT Sessions

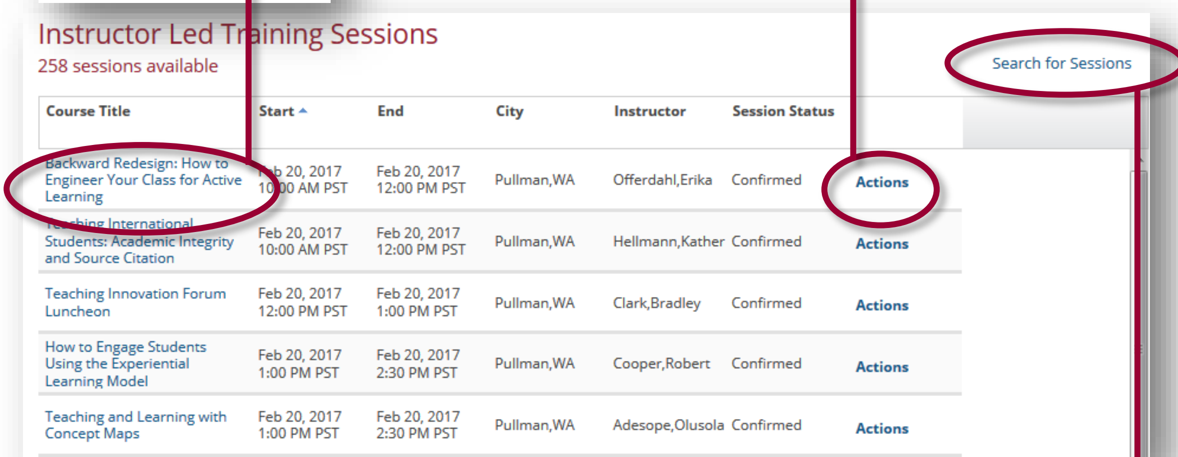


On My Home page, access currently scheduled ILT from Quick Links or Upcoming Events.

By default, the sessions are listed chronologically. Click Course Title to sort alphabetically.

Click on the course title and select the About tab for the course overview. Available sessions are listed under the Sessions tab.

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



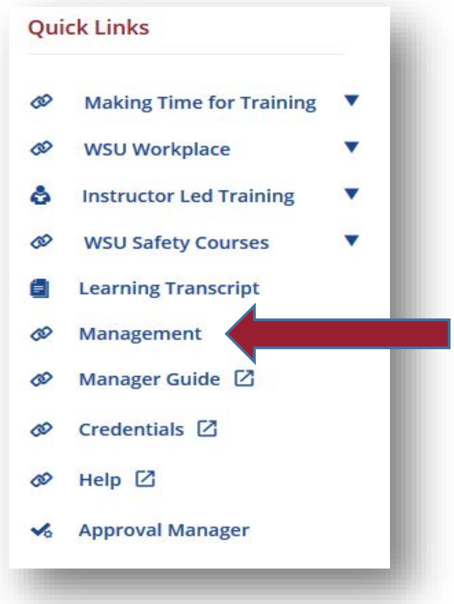
Click Search for Sessions at the upper right corner of the Sessions schedule to locate sessions based on Course Title or keyword.

Management Functions

The two primary Administrative Functions that are available to designated Learning Managers are assigning courses and monitoring employee learning progress by running reports.

Accessing the Management Functions

On My Home page select Management under Quick Links.



Note: If the Management link is not visible, and you understand you have been designated the Learning Manager role by your department Appointing Authority, please complete the *WSU Online Learning Management Authorization Form included in the Appendix of this guide and submit to HRS.*

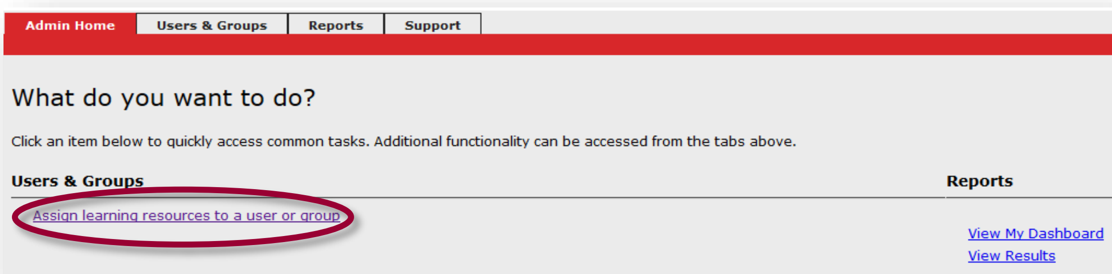
If you have completed the form and still do not see the Management link please contact HRS Learning & Organizational Development at 509-335-4521 or email hrstraining@wsu.edu.

Learning Plan Assignments

Use the Learning Plan Assignment function to establish learning goals for employees or groups within your management areas.

Assigning Learning Assets

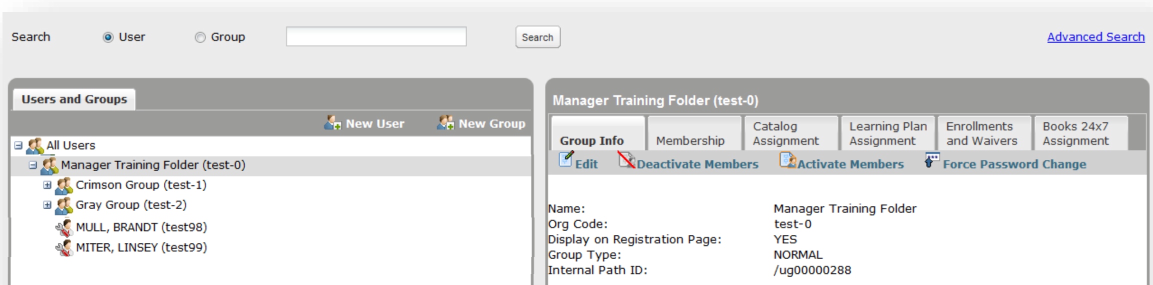
1) On the Management Admin Home, under Users & Groups, click Assign learning resources to a user or group:

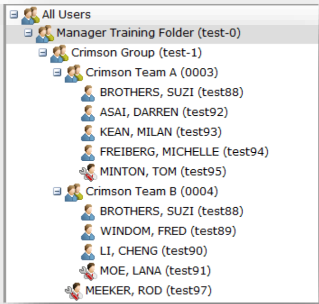


2) The Users and Groups view opens to provide access to all learning accounts in your management area(s). Your management area includes employees within your organizational home department or appointing department number, as well as organizational groups and sub-groups who report to your organizational group. You may also be assigned additional groups and/or subgroups by an Appointing Authority to manage learning activities.

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. You can search users by name, WSU ID number or email address.

Example
The example below illustrates a Manager Training Folder test group in which Brandt Mull and Linsey Miter, identified by their red shirts, are 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.

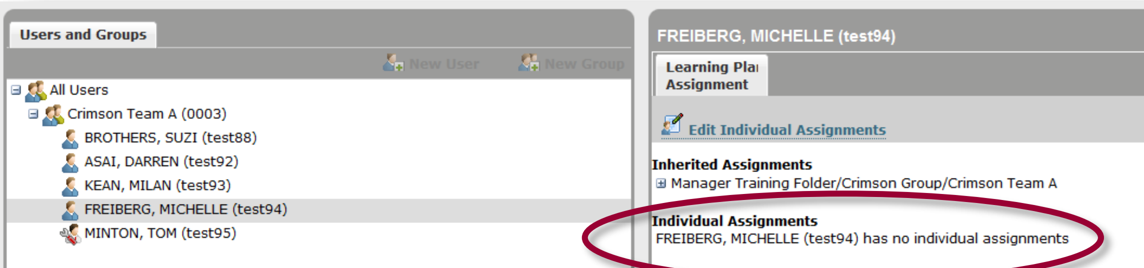




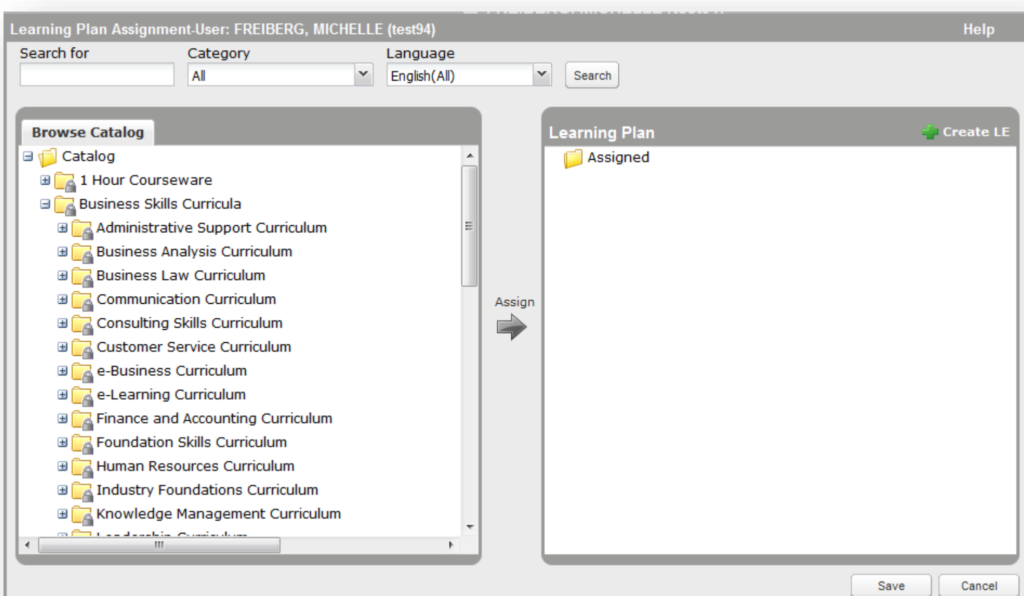
Expanding the Crimson Group reveals two further sub-groups (Crimson Team A and Crimson Team B). Manager Rod Meeker can manage all Team A and Team B employees. Manager Tom Minton can manage all the employees in Team A, and Manager Lana Moe can manage the employees in Team B.

1) To access an individual employee's assignments click on their name in the left pane under the Users and Groups to reveals the employee's assignments in the right pane.

Example
Manager Tom Minton has accessed employee Michelle Freiberg's account. Clicking once on her name reveals her assignments in the right pane. Currently, she has no individual assignments:

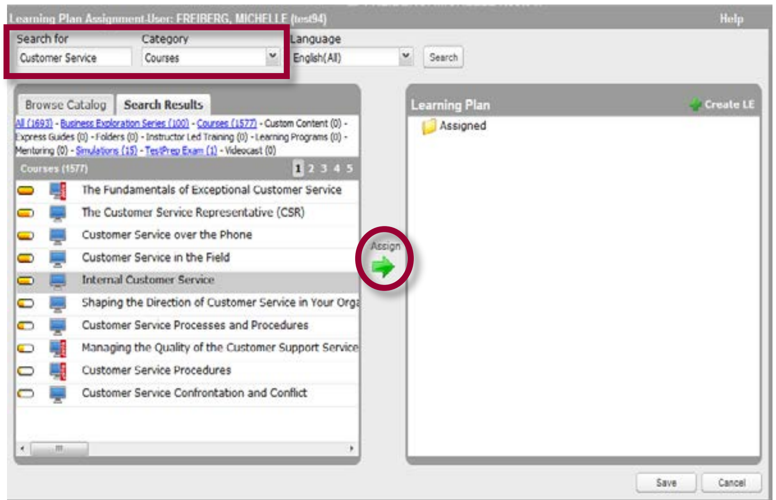


2) Click the Edit Individual Assignments link near the top of the right pane to reveal the window illustrated below to access and assign curriculum.



All the learning assets included in the Online Learning System are now accessible for assignment in this Learning Plan Assignment window.

3) Enter the Course Title or a key word in the Course Title of the learning asset you would like to assign to the employee in to the Search for box at the top left of the Learning Plan Assignment window.



Example
This illustration shows the manager entered the phrase "Customer Service" in the Search for box. The Manager also limited the learning asset category to Courses. Clicking on the Search button revealed Search Results with Customer Service in the Course Title.

4) Select the learning asset you would like to assign and click on the green Assign arrow in the center of the window to add the course to the employees Learning Plan

5) Once a learning asset is assigned, an assignment customization window appears:

Note: Text here will appear in the employee's Learning Plan assignment.

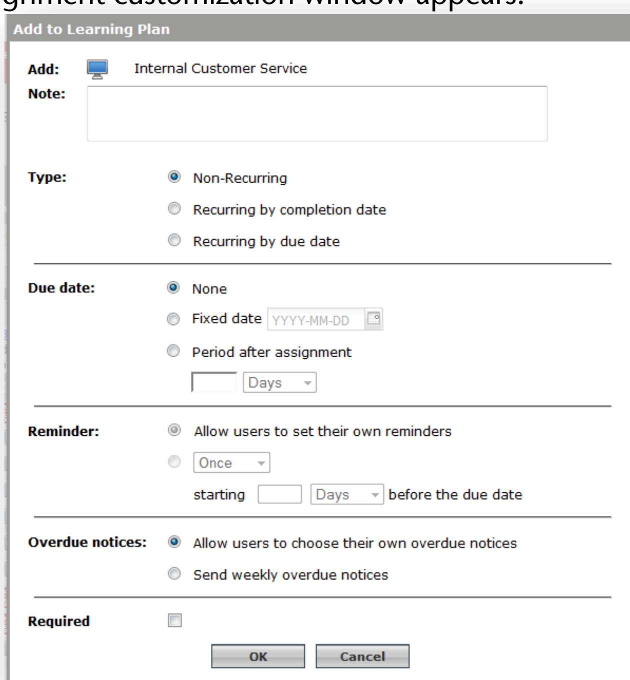
Type: Use recurring only if the assignment needs to be completed repeatedly in the future.

Due Date: Identify when assignment is due by date or timeframe.

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.



6) Click OK to save assignment modifications and close the window.

7) This returns you to the Learning Plan Assignment window where you selected the course for assignment. Click Save to confirm the action and opens a Preview Email Template window.

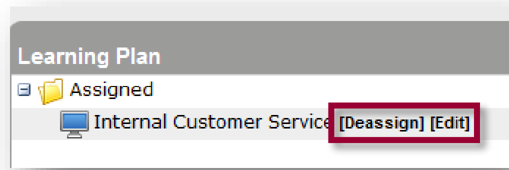
8) In the popup Preview Email Template window you may add an optional note from you to the employee. Click send to notify the employee of the assignment. The email is sent from hrstraining@wsu.edu. Prior to assigning courses in the Online Learning System, HRS recommends you inform the employee of your intent to assign courses, by including information to email you or their supervisor in the Email template provided.

Modifying or Removing Assignments

To modify previous customization or remove an assignment from an employee's account, access the employee's account as above.

Click Edit Individual Assignments in right window pane.

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.



Monitoring Learning Progress

WSU's Online Learning System includes a variety of reports that allow you to track and analyze learning progress as well as content usage by individual and group. As with Learning Plan Assignments, you can view the learning activity of those employees and groups within your management view (see page 5). For all report templates, primary report data fields are preselected and may be modified.

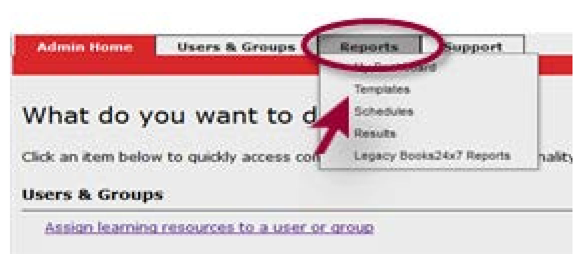
Employee learning activity may take a up to a day to register in their Learning Plan and then show on Reports.

Accessing the Reports Functions

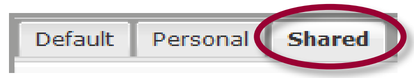
1) From the Quick Links menu on My Home, select Management.

2) On the resulting page, select the Reports tab.

   - From the drop-down menu, select Templates:



- 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 Learning Mangers. The following describes standard reports available. Additional Shared Report templates may be available from time to time.

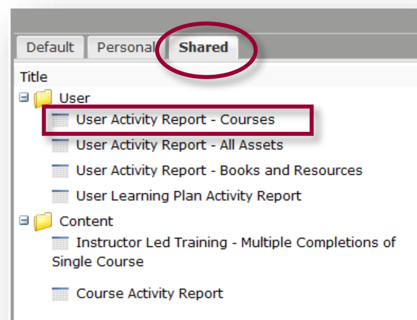
User Activity Reports

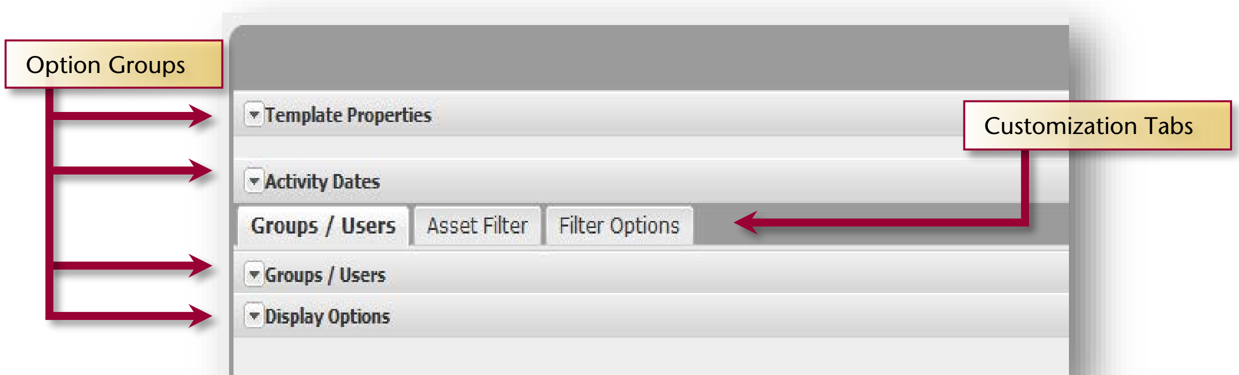
This report allows you to view detailed information of learning activity by a particular employee, multiple employees, or whole departments within your management view. This report is filtered to show activity in both online and ILT courses.

1) Within the Shared Templates tab, expand the User folder by clicking on the ⊞ and select the desired User Activity Report. In this case Courses was selected.

2) After selecting the report, click on Edit in the upper right corner of the page.

3) The below Edit Template page opens which will allow you to customize the report by the four expandable option groups and the three customizaton tabs:





Template Properties: Overview about the report.

Activity Dates: Identify data within a specific date range.

Groups / Users: Identify groups or users to include in the report.

Display Options: Identify available data to include in the report.

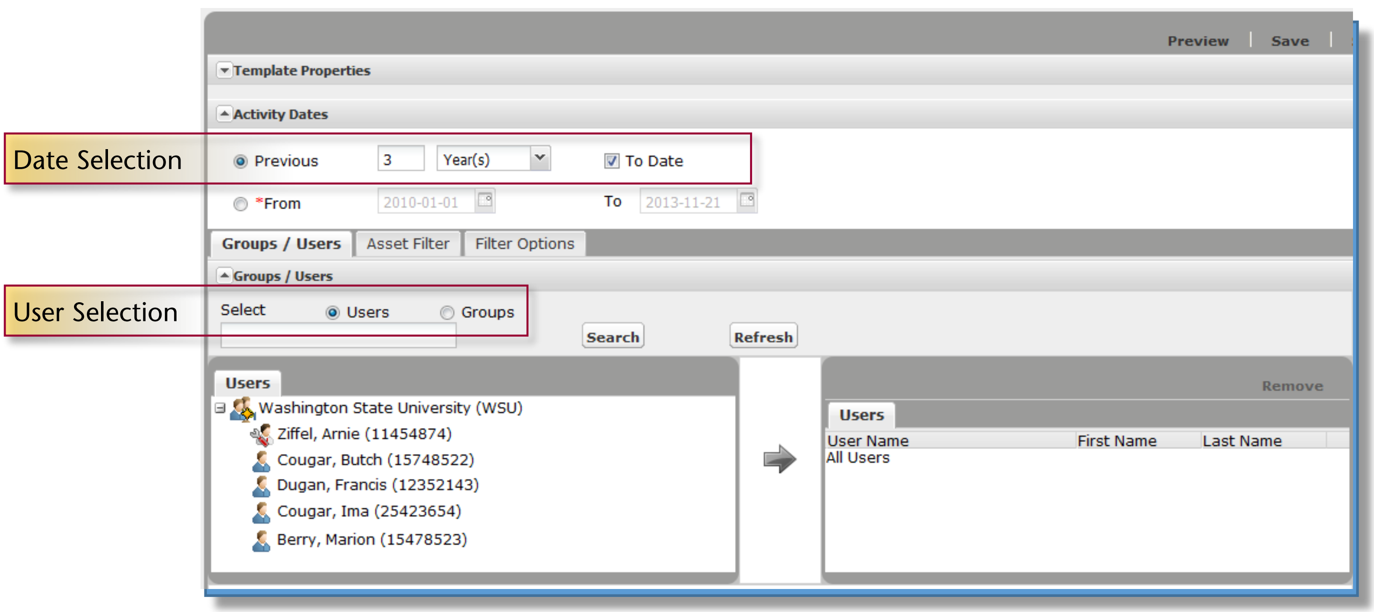
Asset Filter: Returns data by selected asset types.

Filter Options: Allows the user to filter selected criteria to receive in a report.

4) Expand the Activity Dates and Groups / Users options and make the desired selections.

Example
The following report is 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.



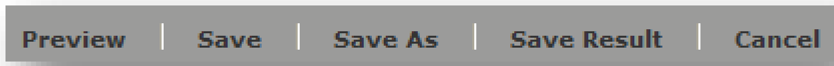
5) To select an employee for the report, click on the name and then click on the arrow between the two panes. If you wish to select more than one employee, hold the Ctrl key while clicking on additional names.

6) To select an entire group (department), click the Groups radio button in the user selection highlighted above. Then click on the desired Group name(s) in the left pane then click on the arrow between the two panes.

7) Select different fields in Display Options to identify available data to include in the report. Primary report data fields are preselected and may be modified.

8) To identify specific learning asset types for the report, modify the Asset Filter selection customization tab. In this area you can identify the types of learning assets that will be included in the report.

9) At this point all necessary parameters are configured and the report can be executed. Actions for the report show in the upper right corner of the Reports page.



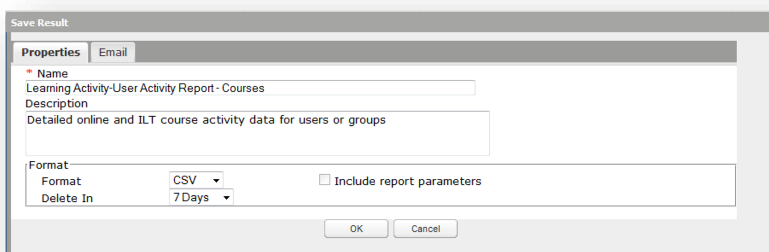
Preview: Displays the results of the report.

Save: Not for use. Saves the changes you have made to the shared report template and makes you the owner.

Save As: Saves a copy of the report template to your personal templates and allows you to rename it for future use.

> *Example:*
> *You designed a report template 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*: Creates a copy of the report results that can be downloaded and saved. The following dialogue box appears.



The Properties tab allows you to modify the name, description, and/or format of the report. Click OK to complete the action. 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.

Cancel: Cancels any customizations made to the original report and allows you to restart.

User Activity Report – Courses

This report includes results for online and ILT courses.

User Activity Report – Books and Resources

This report includes results for user activity on books and other online non-course resource activities.

User Activity Report – All Assets

This report includes results for online and ILT courses, books and other resources.

User Learning Plan Activity Report

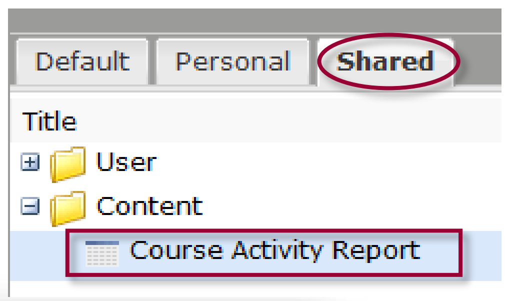
This report includes activity data specifically for items assigned in the User's Learning Plan.

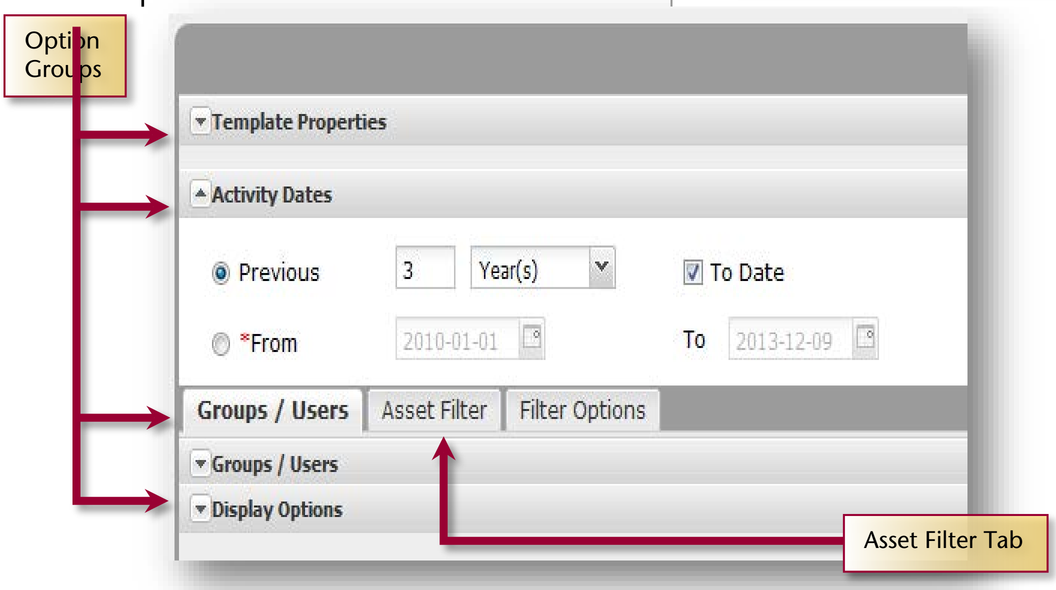
Course Activity Reports

This report allows you to view activity for Users & Groups in your management area for specifed courses. Resulting data can include which employees accessed an asset, if they completed it, and the 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.

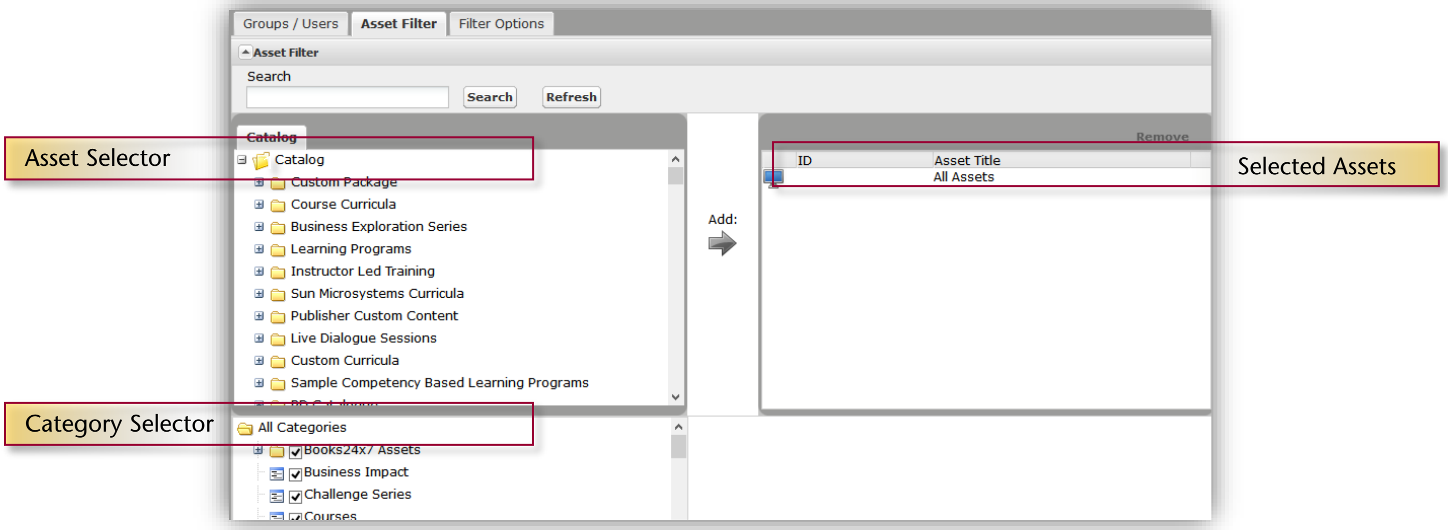
1) Within the Shared tab, expand the Content folder by clicking on the ⊞ and select the Course Activity Report.

2) Click on Edit in the upper right corner of the page. This opens the Report Properties window.





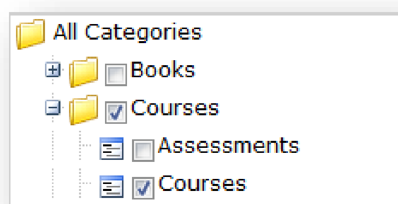
3) Use the Asset Filter options to identify the specific course(s) to view user activity.



The Asset Filter includes the following sections:

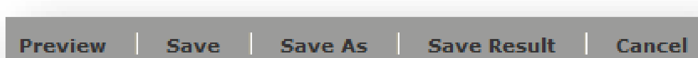
Catalog - Asset Selector
Navigate through the Catalog folders and subfolders or use the Search function above this area to find specific assets. Locate and highlight the specific assets (such as certain course titles) contained in the Catalog. Click on the Asset in the left pane and click Add arrow to move them to the right pane.

All Categories - Category Selector
To select certain asset categories, in the All Categories section, check the box of the specific asset categories to include in the report.



Asset Title - Selected Assets
Assets chosen for inclusion in the report are displayed in the right pane by ID and Asset Title.

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



Appendix

Management Authorization Request

WSU Online Learning System

Training Time Reminder

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

hrstraining@wsu.edu

509-335-4521

MANAGEMENT AUTHORIZATION REQUEST
WSU ONLINE LEARNING SYSTEM

This form is required to view employee training records and assign select courses.

Employee Name	WSU ID Number
Employee Email	Employee Phone Number
Home Department Name	Home Department Number

Appropriate Use Statement

I understand that I am responsible for respecting the confidentiality of information accessed via computer information systems. I understand that this information is to be used for official university purposes only. Misuse of systems information can result in termination of employment or other disciplinary actions. The security of information is provided for by federal and state laws and University regulations (see Business Policies and Procedures Manual (BPPM) *90.05*, *90.06*, and *90.07*, and *Executive Policy Manual EP8*).

I understand that I am responsible for safeguarding my assigned password. I will not share my password with others. I will store passwords in secure locations. I will contact Information Technology Services if I suspect that my password has been compromised.

I understand that unauthorized access to and/or unauthorized use of the University's computer systems or electronic databases may constitute criminal acts under Revised Code of Washington (RCW) *9A.48.070-.100* and RCW *9A.52.110-.130*.

Department Training Record Access
Home department(s) of the employees whose training records will be accessible by this training manager

Department Name	Department Number

Employee Declaration
I understand by signing below I am attesting I have read, understand will abide by the above the above statements.

Employee Signature	Date

Appointing Authority Name (Please Print):	
Appointing Authority Signature:	Date:

Return the completed form to Human Resource Services - Learning & Organizational Development. hrstraining@wsu.edu

Human Resource Services Use

Processed By	Date

Human Resource Services

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: hrs.wsu.edu/hrs-contacts