ULearn

Reference Manual 2-24-16

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University of Minnesota

ULEARN

Reference Manual

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Overview

ULearn is the name of the University of Minnesota's Learning Management System (LMS). It allows for administration, tracking, and reporting of training content – both online and instructor-led. It is the replacement for the PeopleSoft training module known as Enterprise Learning Management (ELM). ULearn is an enterprise-wide solution being leveraged for both employee development as well as non-credit courses.

There are many benefits to ULearn. It allows for certifications, annual renewal notices, and tracking. It also has improved reporting capabilities. In addition, the University of Minnesota is gaining consistency and efficiencies in how training is recorded.

ULearn is set up to track training for University of Minnesota employees, including faculty, staff, student employees, and temporary employees. Occasionally, however, students and University affiliates need to access training in the system. That can be accomplished with a self-registration group.

A self-registration group allows administering and tracking training for students and non-University affiliates in ULearn. An individual must register in ULearn via a particular URL. At that point, they are able to search and register for training. Refer to the "Appendix A: Provisioning Application Administration for more information on non-employees utilizing ULearn.

Roles and Responsibilities

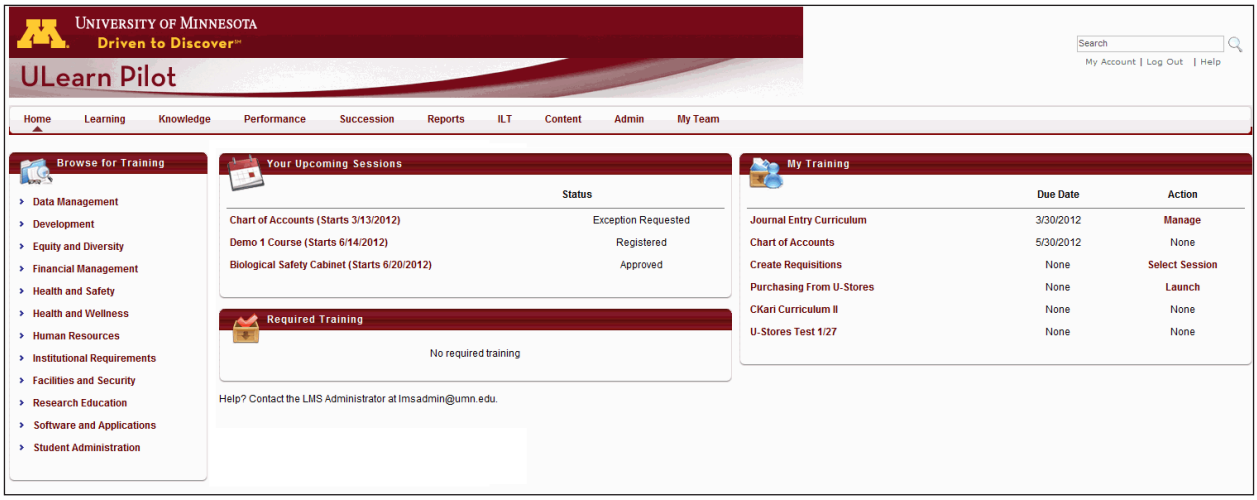
There are several security roles in ULearn, each with different capabilities.

Learner	The default role for everyone with access to ULearn. Allows the ability to search, request, and take training through the system.
Manager	Individual responsible for approving training and maintaining performance-related information on direct reports.
Instructor	Individual who leads training. Has the ability to manage and print class rosters. May have the ability to set up sessions.
Proxy Enroller	Individual with the ability to enroll learners into events and sessions.
Session Administrator	Individual with the ability to create sessions, administer evaluations, proxy enroll learners, manage class rosters, waitlists, and emails, and assign prerequisites.
Learning Administrator	Individual with the ability to create events and sessions, administer evaluations, proxy enroll learners, manage class rosters, waitlists and emails, assign prerequisites, and establish curricula.
Test Administrator	Individual with the ability to create tests and appoint test grades.

Access to ULearn is granted by completing the ULearn Access Request Form.

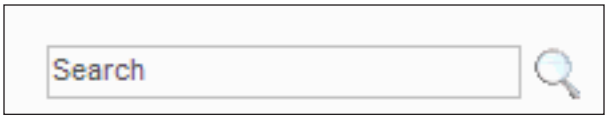
The search area of the system enables you to search for learning objects such as events, online courses, curricula, tests, and materials. There are several ways that a learner can search for training.

- Use the *Search* field located in the upper-right corner of the page.
- Browse for training by subjects.
- Locate training on the Events Calendar.



SEARCH BY TITLE

In the upper-right corner of the window, there is a Search text field.



Search results display on the **Advanced Search** screen. By default, this searches for training by title and keyword.

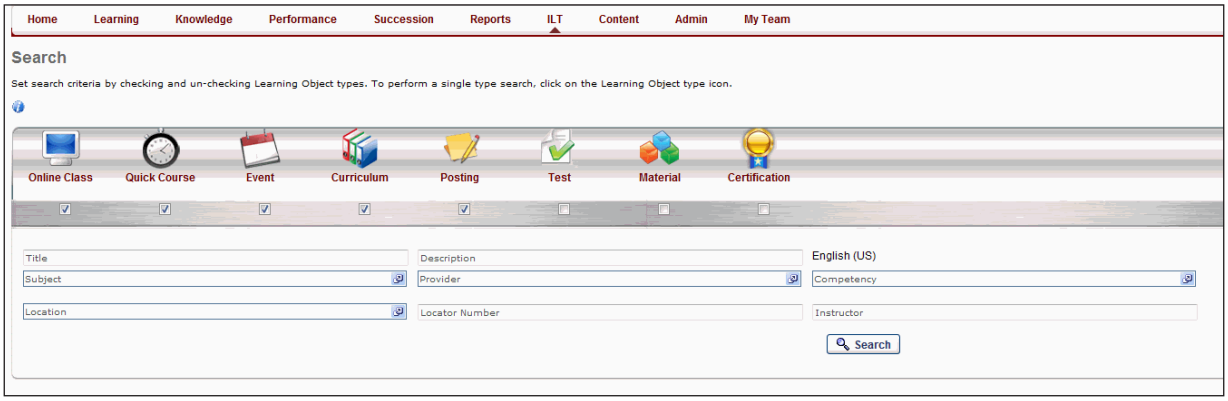
Search for Training (cont.)

BROWSE BY SUBJECT

The Browse for Training option can be accessed from the **Home** page or the **Learning** tab.

When browsing by subject, the available training items attached to both the parent subject and the child subject are displayed.

Search results display on the **Search** screen. By default, this searches for training by the subject selected, meaning that subject is placed in the *Subject* field.



ADVANCED SEARCH

This search screen allows the option to narrow the search using the following possible search criteria:

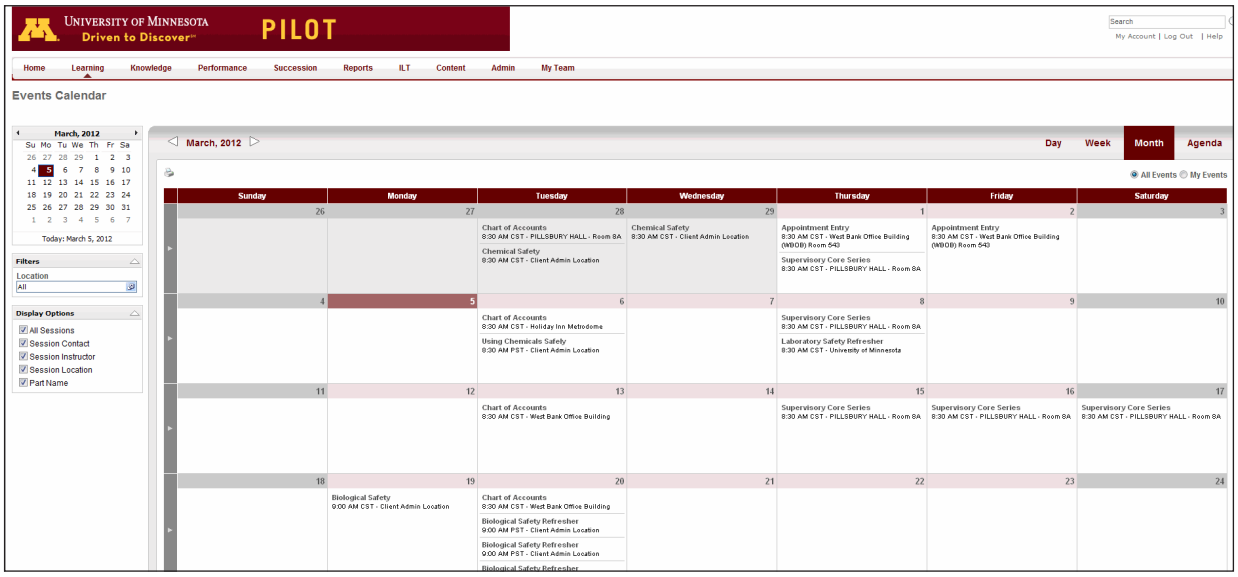
- Learning Object (LO) Type – For example, events, online courses, curricula, tests, and materials. Multiple LO types can be selected.
- Title
- Description
- Subject
- Provider
- Location
- Locator Number
- Instructor

Click <Search> to search using the selected criteria. The search results can be sorted by Title, Type, or Provider.

EVENTS CALENDAR

Searching for training can also be done via the Events Calendar under the **Learning** tab. Use the calendar, filters, and display options to locate training.

Hovering over an Event name displays the Hover Details. Clicking the Event window closes the Hover Details and opens the Session Details.



REQUEST TRAINING

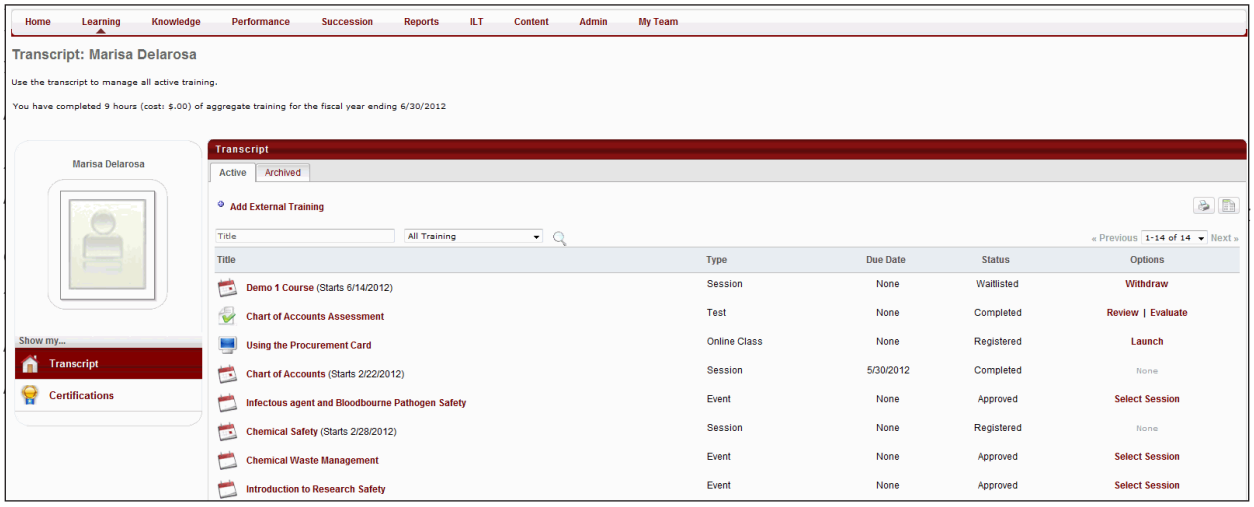
Request training is the process that enables learners to instantaneously request all types of training, automatically solicit the necessary approvals, and initiate the appropriate registration process. Training approvals, waitlists, prerequisites, pre-work, interest tracking, and registrations are initiated with this process.

Manage Your Transcript

VIEW YOUR TRANSCRIPT

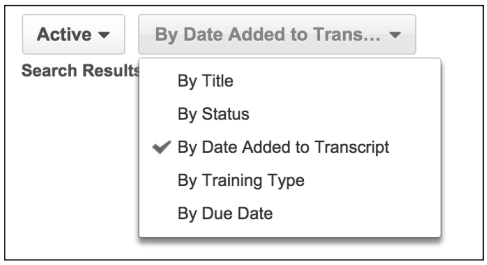
The <View Transcript> link can be accessed from the **Learning** tab.

Every learner has a personalized transcript which provides several options to register, launch, select, withdraw, renew, and complete training. The transcript also displays the status of each training item requested by, assigned to, or required of the learner. The *Status* column on the transcript allows learners to determine if the training is pending, approved, denied, and many other potential stages. Depending on the training status, learners can register, launch, and perform a variety of other training functions directly from the transcript.



By default, the most recently added items are displayed first on the transcript, whether as a result of a request or an assignment.

You can also filter how the learning objects are displayed in a transcript by clicking the drop-down next to the transcript selection button.



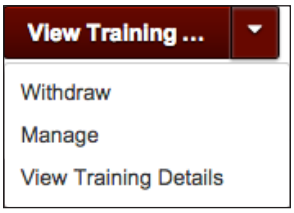
The Transcript is divided into three separate transcripts: Active, Archived, Completed. To view the separate transcript pages, select the drop-down menu that says "Active" then select the transcript you would like to view.

The **Archived** transcript displays transcript items that have been moved off the learner's **Active** or **Completed** transcript, and the **Completed** transcript displays learning objects that are marked complete.

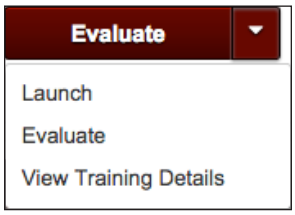
To search within one of the transcripts, enter in key words in the *Search for Training* field and click the lookup icon. This will search for the training within that specific transcript. To search for training that has been completed you must select "Completed" from the drop-down menu and then search for the learning object.

For additional options, such as Withdraw, click on the drop-down arrow to the right of the button corresponding with the training. If you click the button it proceeds with the action listed in the button.

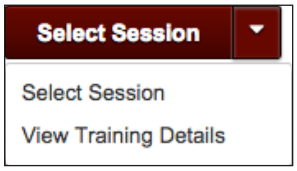
The options in the drop-down will differ depending on the type of learning object:



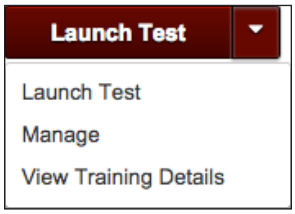
Instructor Led Training



Online Training



Withdrawn Training



Test

Manage Your Transcript (cont.)

TRANSCRIPT STATUSES AND OPTIONS

The transcript contains numerous Statuses and Options which are automatically updated based on learner, manager, and administrator actions and type of learning object.

Course Status Update

The automation of the system enables course statuses and options to be automatically updated, for example:

- When a manager approves a course:
  - The transcript status is automatically changed to Approved.
  - The transcript option changes to allow the user to register.
- When you register for a course:
  - The Status option changes to Registered.
  - A <Launch> link appears in the *Options* column if it is an online course.

Status	Learning Object Type	Description
Registered	All	Learner is registered for a training. This status is accompanied by the Withdraw option if it is before an ILT session start date.
In Progress	ILT Session, Online Class, Curriculum	Training is in progress. ILT Session will have this status after the roster has been submitted if the learner has not completed the required pre/post work.
Completed	ILT Session, Online Class, Test, Curriculum	Training is complete.
Pending Prerequisite	ILT Session	Learner is registered for the prerequisites for that session but has not completed the prerequisites yet. This will only appear if the prerequisites do not have to be completed before session registration.
Withdrawn	External Training, ILT Session	Learner withdrew or was withdrawn from an ILT Session or External Training item.
Cancelled	ILT Session	Learner was registered for an ILT session that was cancelled. This status is accompanied by the Select Session option.

Status	Learning Object Type	Description
Exception Requested	ILT Session, Curriculum	Applies to training that was requested by a learner who has either not completed the necessary prerequisite or completed it prior to the launch of ULearn. This status is accompanied by the Withdraw option.
Waitlisted	ILT Session	Learner is on a waitlist for a session and cannot register because the session is full. When a learner has this status, they will have the option to withdraw.
Waitlist Expired	ILT Session	Appears if a learner was on a session waitlist when it expired. This expiration date is either explicitly stated in the session details, or it automatically occurs at the session start date.
Registration Pending	ILT Session	Learner has been granted an opening from the waitlist for an ILT session and has not yet registered for the session.
Denied	All	Training was denied by the approver. This will appear when an Exception Request is denied.
No Show	ILT Session	Learner did not attend the training.
Pending Evaluation	ILT Session, Online Course, Curriculum	Training is complete and the evaluation is required and not yet completed.
Incomplete	All	This may mean that the training was marked complete and the learner did not pass or attend all the required parts, or a test was failed but more attempts are allowed.
Past Due	All	The due date has passed and the training is not completed.
Failed	Test	The test was failed.
Pending Completion Approval	External Training	Appears for external training that has been marked complete and is pending completion approval.
Pending Acknowledgement	ILT Session, Online Course, Curriculum	Training is complete and the acknowledgement form is required and not yet completed.
Expired	All	Expired appears when the training object assigned due date has expired.
Registration Closed	ILT Session	Appears if the learner is Approved or Registration Pending for an ILT Session and the registration deadline has passed.
None	Event, External Training, or ILT Session.	None appears when the training is completed or the learner withdrew from the training. This also appears for denied Events or Sessions that are a No Show.

Manage Your Transcript (cont.)

Option	Learning Object Type	Description
Register	All (Except Event)	Appears when the training has been approved and the learner is clear to register.
Withdraw	ILT Session, External Training, Curriculum	Appears for withdrawing a pending request for an ILT session, withdrawing from external training, withdrawing an exception request, or withdrawing from a waitlist.
Launch	Online Course	Appears once the learner has registered and is clear to launch training.
Launch Test	Test	Only appears for tests that are registered.
Retake Test	Test	Only appears for failed tests with more attempts allowed.
Select Session	ILT Event	Appears as a prompt for the learner to select a session.
Manage	ILT Session, Curriculum	Appears if the training item is a curriculum, a library, or a session with pre-work, post-work, or prerequisites.
Evaluate	ILT Session, Online Class, Curriculum	Appears if the training has an evaluation or acknowledgment form that has not been completed and the training is otherwise complete.
Acknowledge	ILT Session, Online Class, Curriculum	Appears if the training has an evaluation or acknowledgment form that has not been completed and the training is otherwise complete.
Request Again	All (Except Event)	Appears if the status is denied.
Mark Complete	External Training	Appears for external training that has been added to the transcript and has the status Registered.
None	Event, External Training, ILT Session	Appears when the training is completed or the learner withdrew from the training. This also appears for denied Events or Sessions that are a No Show, as well as an event for which the learner is restricted from selecting a session.

WITHDRAW FROM A SESSION

Withdrawing from a session is done via the transcript by clicking <Withdraw> in the *Options* column, entering comments for withdrawal, and clicking <Submit>. Depending on how the course is set up, there may be a withdrawal penalty.

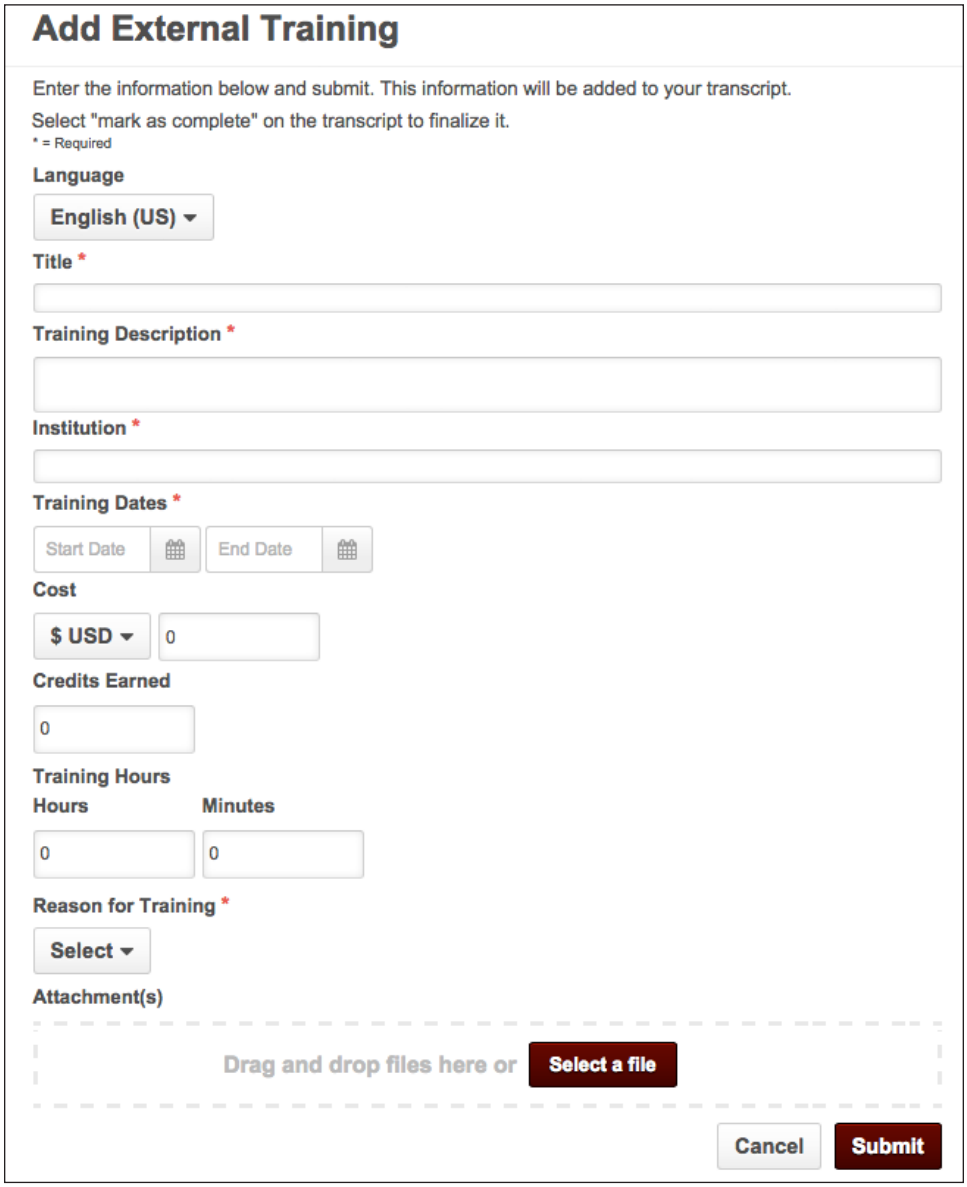
ARCHIVE TRAINING

Archiving training is done via the Transcript. Click on the title of the training or select "View Training Details" from the action button or drop-down. Then click <Move to Archived Transcript> in the upper right hand corner of the **Training Details** page. Training can be made Active again by clicking on the training title and then clicking <Activate>.

Note: Nothing is ever "deleted" from the system. It is either "Active" or "Archived."

EXTERNAL TRAINING

To add external (i.e., self-reported) training, select "Add External Training" from the **Options** drop-down menu located in the upper right hand corner of your transcript. Complete the training details, and click <Submit>. Refer to the "Appendix B: External (Self-Reported) Training" for additional information on the adding external training business process.

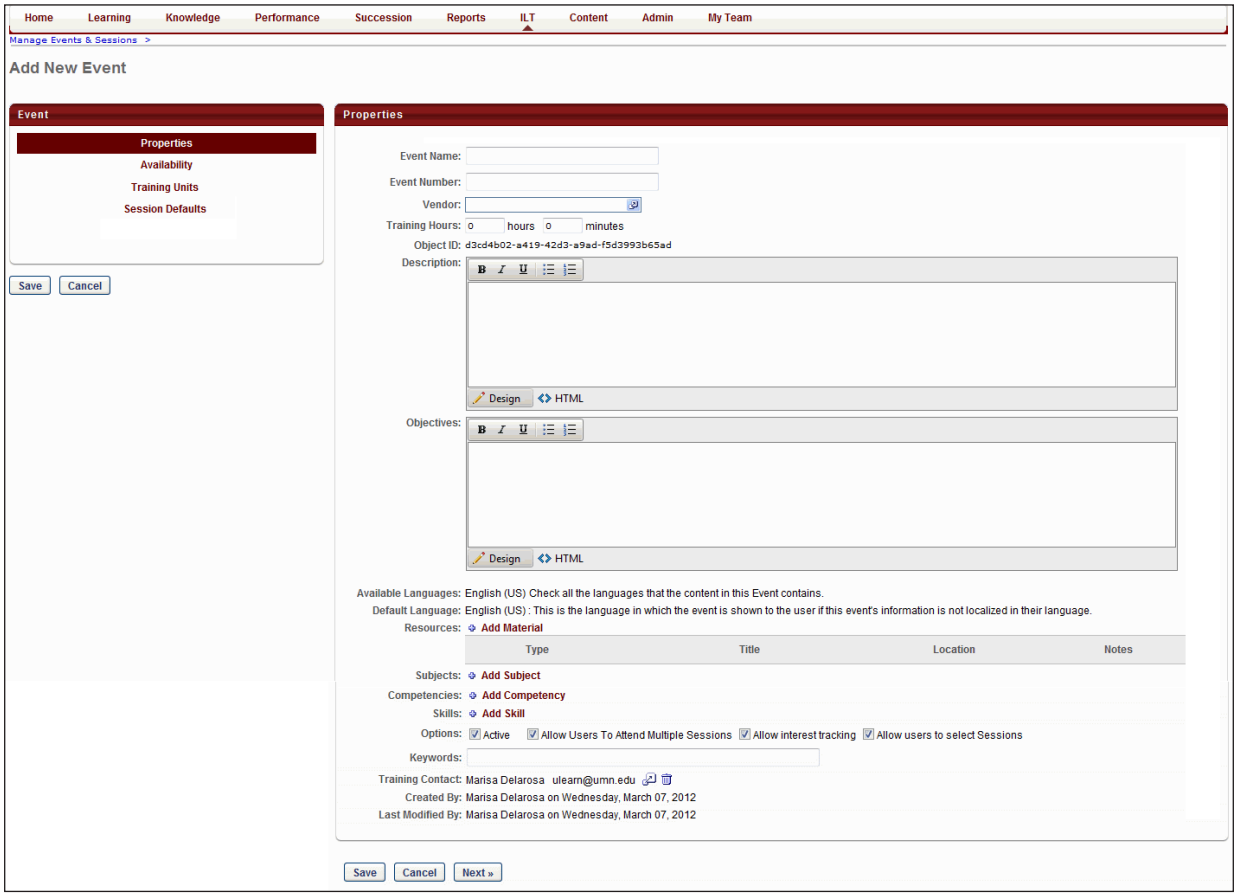


Create Events

Events are instructor-led training courses that contain general information about the course, such as the description, the objectives, the vendor (provider), and the subjects. Because there are typically many instances of one course held at different times and locations by different instructors, every Event can occur at a variety of times and places. These scheduled instances of an event are referred to as Sessions.

Creating events allows ILT Administrators to avoid duplicating their efforts every time a new instance of the same course must be scheduled. The Event remains the constant so that the administrator has the flexibility to schedule and repeat the same learning experience an indefinite number of times, without ever re-entering the basic course information.

Events are created via the **ILT** tab under *Manage Events and Sessions*.



Field Name	Description
Event Name*	Required. Course title. A course title should reflect the overall content or learning objective for the course. The title is the primary searchable element of a course that learners will use. The *Search* field in the upper right corner searches on this title. For ease of reporting and learner searching, do not embed a course numbering system in the title.

Field Name	Description
Event Number	Optional. Course number or code. Field is not searchable or reportable.
Vendor*	Required. The unit who owns this training. The learner should contact this unit with questions regarding course content, location, or scheduling. Also known as "provider."
Training Hours	Length of the course that will display on the Event Detail pop-up. If 0 hours and 0 minutes is the event value, no value will display on the Event Details pop-up.
Description*	Course description. Can be formatted in HTML. Will display for the learner after a successful search has been conducted. This field has no character limit.
Objectives	Course objectives. Can be formatted in HTML. The character limit for this field is 3500.
Language	English is the default value.
Resources	Link the course to any materials that are useful to the learner. See the job aid on materials for additional information.
Subjects*	Required. Subjects are the table of contents for the course catalog and are used to search for training. Multiple subjects can be attached to courses. The order in which subjects are selected is the order in which they will display in the Event Detail pop-up. Click <Add Subject> to associate the course with a Subject. For more information refer to the "Appendix C: LMS Subjects - Guidelines."
Competencies	Not used at this time.
Skills	Not used at this time.
Options	Indicate if the course is active, if learners can take the course more than once, and if they can express interest in a course if no sessions are scheduled.
Keywords*	Enter word(s) to associate with the course. When a learner searches on any of the keywords specified here, the course title will appear in the search results.
Training Contact*	Select by clicking on the Search icon. Will be displayed to the learner in the Event Detail pop-up. Defaults to the person creating the course but can be overridden. Best practice is to use provider.

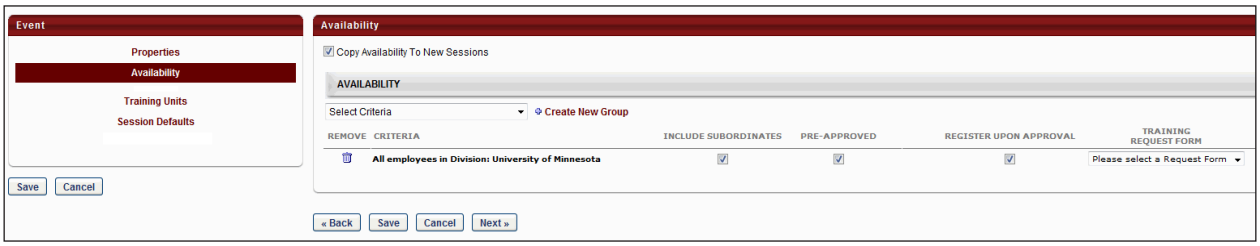
* Indicates field that is required or is best practice.

Create Events (cont.)

AVAILABILITY

Define who can view this course in the catalog. If no Availability is set, the course will not be open for registration. Availability can be overridden at session level. Multiple availability criteria can be set for one course.

All courses should be made available to the University of Minnesota division, unless it is unit-specific training.

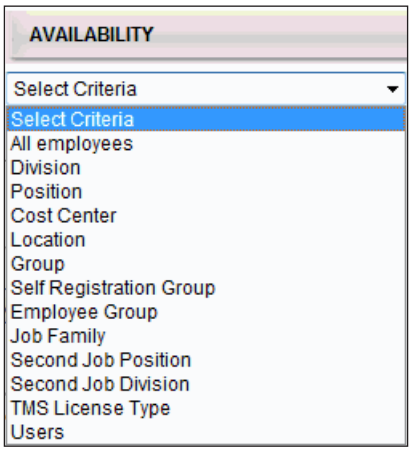


Field Name	Description
Copy Availability to New Sessions	Availability criteria will default into each session created. Can be overridden at the session level.
Create New Group	Allows user to set new criteria if existing options do not meet the availability needs
Include Subordinates	Checked by default. Always select this box to ensure all people meeting the selected criteria can view this course.
Pre-Approved	Checked by default. Select this box to bypass the approval process. Course will appear directly on the learner's transcript in Approved status.
Register Upon Approval	Checked by default. Select this box to bypass the supervisor or manager approval process. Course will appear directly on the learner's transcript in Registered status.
Training Request Form	Select a training request form to attach to this course, if applicable. See the job aid on creating training request forms for more information.

ORGANIZATIONAL UNITS

Organizational Units (OUs) capture, store and categorize all data loaded into the system via PeopleSoft Human Resources Management System (HRMS). They can be used to include and constrain functionality such as who can access certain training. OUs are also used to define reporting criteria.

The screenshot below shows all of the OUs available in ULearn. They are used as criteria when defining availability.



Field Name	Description
Division	The HR DeptID and description. This is the primary hierarchy to represent the overall structure. Note: The majority of preferences are defined at the Division: University of Minnesota level.
Position	The Position, or Job code and title, from each employee's primary job – not position number from position management.
Cost Center	Provides an accounting (chart of accounts) structure and is used to bill back training costs, group users, etc. Similar to Division, but based on the Financial DeptID tree (UM_DEPTID_BUDGET). Can be used to charge departments for classes with a cost. Each level of the tree is represented as a Cost Center with a Parent ID.
Location	Training facilities are tied to a Location and used for sessions. University locations are pulled from the Space Management tables in the Data Warehouse. Location hierarchy will be inferred from the format of Campus code, bldg code, and room number, to ease the search and allow a drill down from campus to building to room. Note: There are two system uses for location, all learners are attached to the UMNMain location, but the primary use will be the facility locations.
Group	Custom OU. Groups are created via the *Create New Group* field. The users within a Group are dynamically updated, based on the user criteria, every time the Group is processed.

Create Events (cont.)

Self Registration Group	Allows for non-employees, former employees, as well as temporary, seasonal, and contractor groups to access training under separate licenses than the employee licensed group.
Employee Group	The associated Primary job Employee Group.
Job Family	The Job Family associated with the Primary job of the employee.
Second Job Position	The job code of the employee's [active] secondary job, if a second job exists. This OU does not have hierarchy, but does allow for reporting based on department and department rollups for secondary jobs.
Second Job Division	The division associated to the employee's secondary job, if applicable.
TMS License Type	Refers to the license-type the learn holds. Full License is assigned to employees while Per Registration License is used for the non-credit group.

NOTE: As a general rule, OUs contain some type of hierarchical or nested data structure (e.g., the locations of "Board of Regents" and "President" roll up to the parent location "University of Minnesota").

Employees included in the data feed from HRMS are:

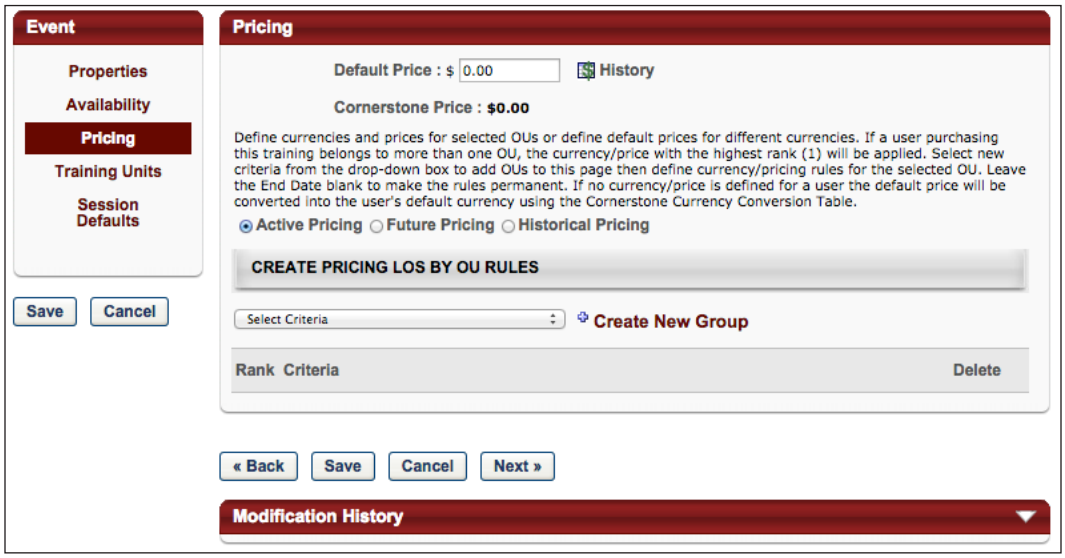
1. All Staff and Faculty, full or part time, actively employed
2. Employees on leave or short work breaks
3. All student workers and seasonal workers

PRIMARY VS. SECONDARY JOBS

Each EmplID with at least one active record will have a primary job defined as the record with the highest number of standard hours. Any record (employee) with more than one active job record will have the second highest standard hours record identified as the Second Job. That information will be sent as the second Job Position and the associated DeptID would be sent as the Second Job Division.

PRICING

Not used at this time.



TRAINING UNITS

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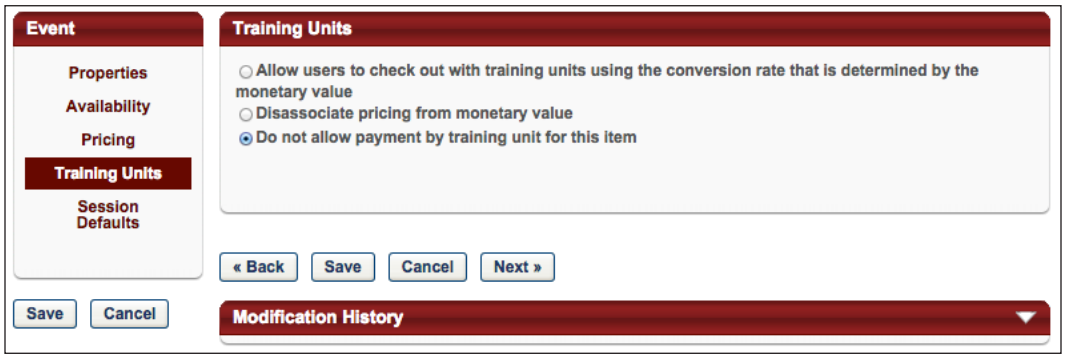


Create Events (cont.)

SESSION DEFAULTS

Session Defaults

Registration Deadline: 2 Day(s) Before first part of session starts. (Request and Register)

Before: (Session Start Date and Time – Timing Selected Above = Registration Deadline)
After: (Session Start Date and Time + Timing Selected Above = Registration Deadline)

Minimum Registration: 6

Maximum Registration: 24

Preferred Instructors: Add Instructors

Price per Session: $ 0.00

Cost per Session: Add Cost Type

Restrict Withdraw from Session: Restrict users from withdrawing from Sessions in the Event

Penalty for Withdrawal: Add Withdrawal Penalty

Credits per Session: 0

Prerequisites: Add Prerequisite

NAME	TYPE	REMOVE
Basic Accounting	Event	

User must complete prerequisites before registering for this session

User must register for prerequisites before registering for this session, and must complete prerequisites before the session start date

Pre-Work: Add Pre-Work

Post-Work: Add Post-Work

REQ.	SEQ.	DISPLAY POSITION	NAME	TYPE	REMOVE
☑	0		Chart of Accounts Assessment	Test	

Waitlist:
☑ Allow waitlist for sessions in this event
☑ Allow Auto-Management of Waitlist
☑ Auto-Register User upon Granting Waitlist

Waitlist Deadlines: Students have 0 days and 0 hours to register for a class after a waitlist opening is granted

Waitlist expires 0 days and 0 hours before registration deadline

Request Form: Please select a Request Form

Required Training Approvals: Place a value in this box greater than 0 to require this number of training approvals to all users who request this training. If this box is blank, the system will look at the user record for the required number of training approvals.

Required Completion Approvals: Place a value in this box greater than 0 to require this number of training completion approvals to all users who complete this training. Upon completion user's status will proceed to Pending Completion Approval before moving to Completed. If this box is blank, the LO will not require completion approval

Enter the following information to specify how settings automatically default when creating a session. This information can be overridden at the session level.

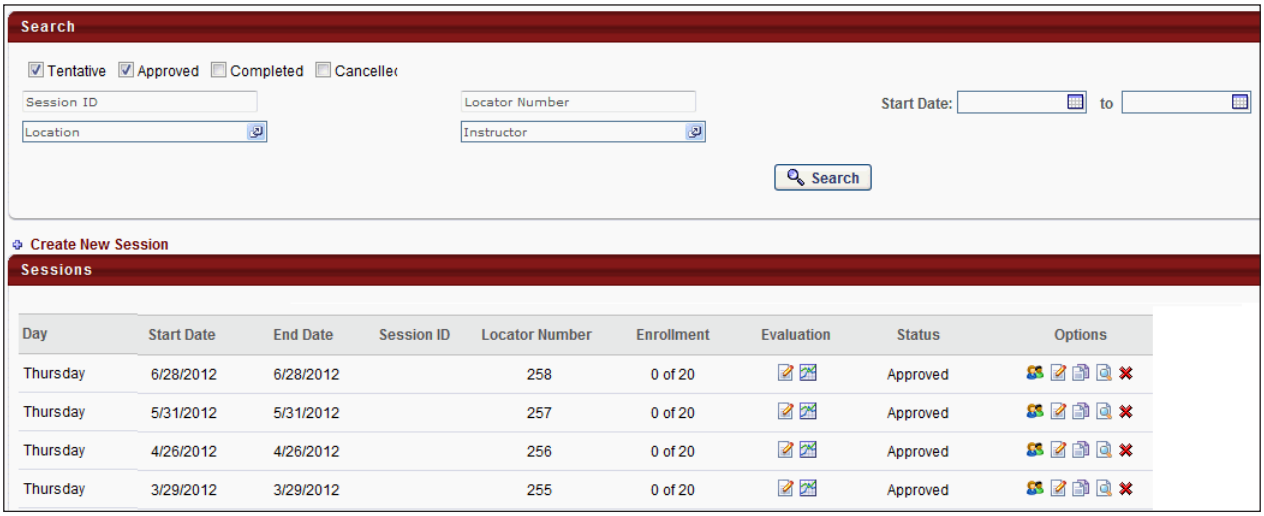
Field Name	Description
Registration Deadline	If applicable, enter number of days/hours before the session start date when registration should end.
Minimum Registration	Required. Minimum number of registrants required for the session.
Maximum Registration	Required. Maximum number of registrants allowed for the session.

Preferred Instructors	By clicking <Add Instructors>, a list of primary and secondary instructors can be set up for the sessions. This can be overridden at the session level. If an Instructor is added, and later becomes inactive, the Instructor's name will still appear for existing and new sessions. The name must be removed from the Preferred Instructor list.
Price per Session	The learner's cost for the session. Will be billed upon registration.
Cost per Session	Actual cost of the session for the training unit. For reporting purposes, only. Not displayed to the user.
Restrict Withdraw From Session	If selected, a learner must contact the training unit in order to drop the session.
Penalty for Withdrawal	The learner's cost of dropping the session.
Penalty for No Show	The learner's cost for not attending training without withdrawal.
Credits per Session	Credits learner receives for taking this course.
Prerequisites	Training that must be completed prior to taking this course.
Pre-Work	Materials that must be completed prior to taking this course.
Post-Work	Materials that must be completed after taking this course.
Waitlist	Options for allowing and/or managing a waitlist for this course. See the Manage Waitlists section on page 25 for more information.
Waitlist Deadlines	Optional waitlist registration deadlines.
Request Form	Form that the learner will complete at the time the session is requested.
Required Training Approvals	If approval is required in order for a learner to enroll in this course, up to three approval levels can be set. Approvals are based on management hierarchy.
Required Completion Approvals	If approval is required in order for this course to marked as complete on a learner's transcript, up to three approval levels can be set. Approvals are based on management hierarchy.

Create Events (cont.)

Sessions are scheduled instances of instructor-led training courses or individual occurrences of events. They include more specific information about course instances, such as times, locations, instructors, and resources. Data entered in the *Session Defaults* section at the course setup level pulls into each session, though it can be overridden and different for each session.

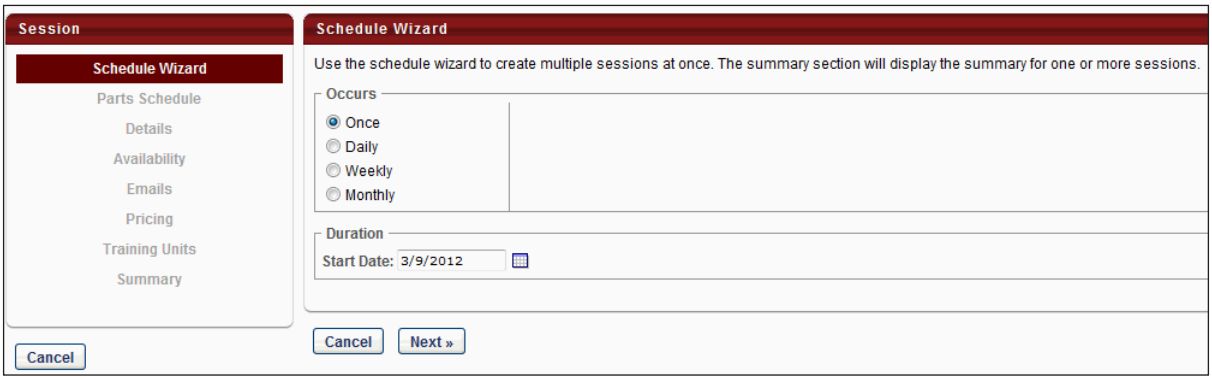
Sessions are created via the **ILT** tab under *Manage Events and Sessions*.



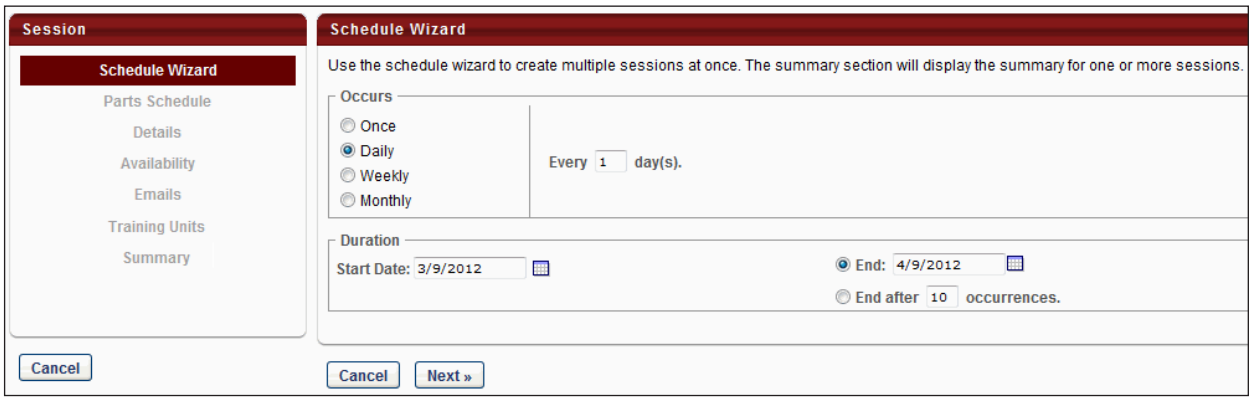
SCHEDULING

Sessions are created with the Scheduling Wizard which allows for multiple sessions to be set up at one time.

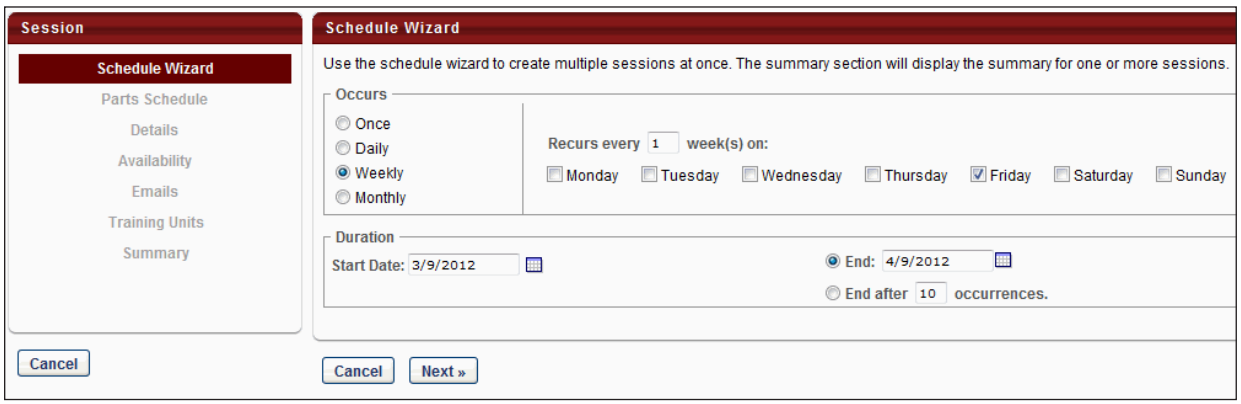
The screenshot below displays data required for one-time session setup:



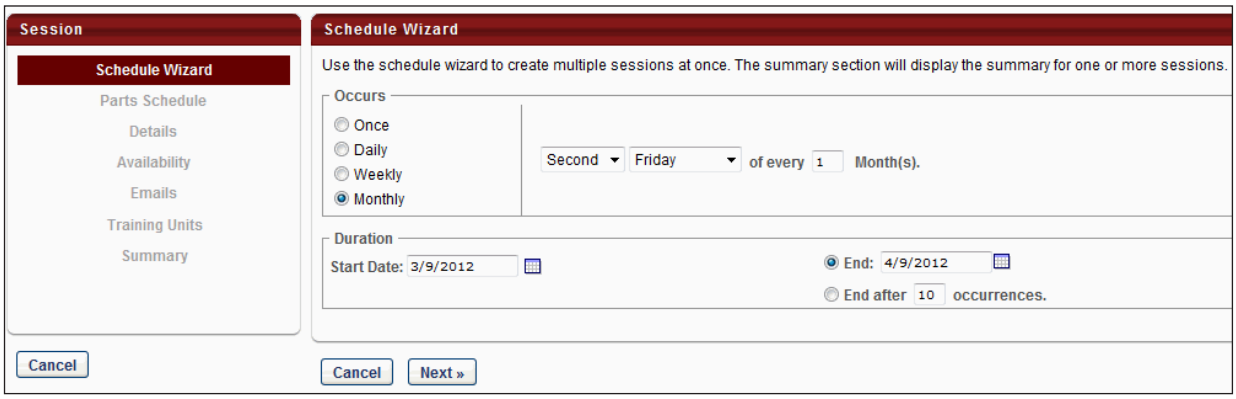
The screenshot below displays data required for daily session setup including frequency, start and end dates, and number of occurrences.



The screenshot below displays data required for weekly session setup including recurrence, day of the week, start and end date, and number of occurrences.



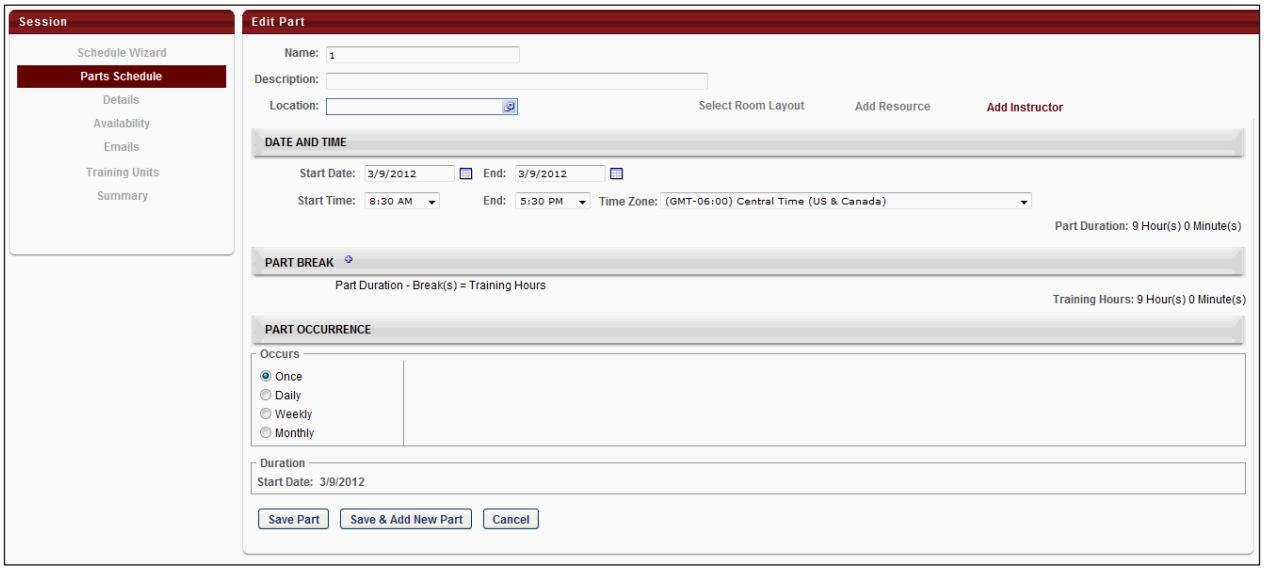
The screenshot below displays data required for monthly session setup including recurrence, day, start and end date, and number of occurrences.



Create Sessions (cont.)

PARTS SCHEDULE

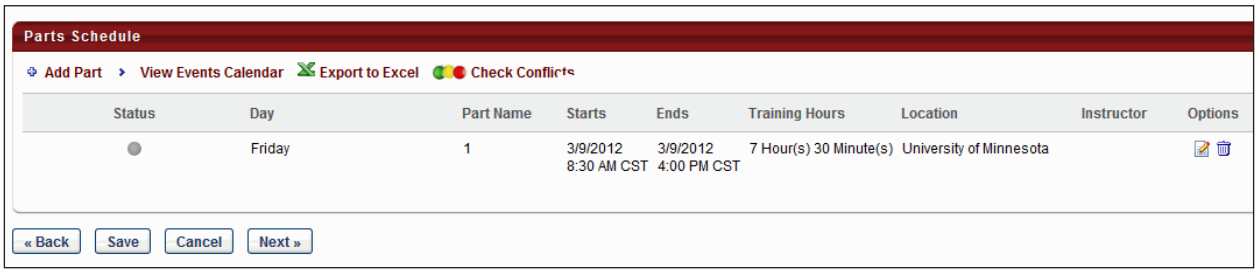
Sessions are broken down into parts. By default, each session has one part. If the session lasts more than one day, additional parts may be added. See <Save & Add New Part> on page 21.



Field Name	Description
Name*	(50 characters) Required. Name of session part. Displays on **Session Details** page from transcript, event calendar and session details pop-up. Also displays in default email reminders.
Description*	(100 characters) Description of session part. Displays on the **Session Details** page from transcript.
Location	Required. Location where the session will be held. Do not select "require confirmation."
Select Room Layout	Click to display available room layouts for the location, if applicable. (Must be created when setting up the location.)
Add Resource	Click to display available resources for the location, if applicable. (Must be created when setting up the location.)
Add Instructor	Click to display available instructors for the vendor for this session.
Start Date*	Session start date with the format (MM/DD/YYYY), or click on the calendar icon to select a date.

End Date*	Session end date with the format (MM/DD/YYYY), or click on the calendar icon to select a date. Start date and end date should be the same unless the sessions spans across midnight. Multi-day sessions should be scheduled using Part Break functionality.
Start Time*	Select session start time from the drop-down list.
End Time*	Select session end time from the drop-down list.
Time Zone	Select time zone in which the session start and end times are provided. Defaults to Central Time.
Part Break	Enter any break duration in minutes. For example, if there is a lunch break or an overnight break for a multi-day session.
Part Occurrence	Select the occurrence of the part, whether it is Once, Daily, Weekly, or Monthly.
<Save Part>	Saves part information, checks for errors, and continues on to **Session Details** page.
<Save & Add New Part>	If the session duration is more than a day, or if separate sessions within the same day are required, add the session parts by clicking this button. Multiple parts can be added if the session covers multiple days or time periods, or if parts of the session are held at different locations. Repeat the process for each required part.

After saving the above Part information, the following options are available:



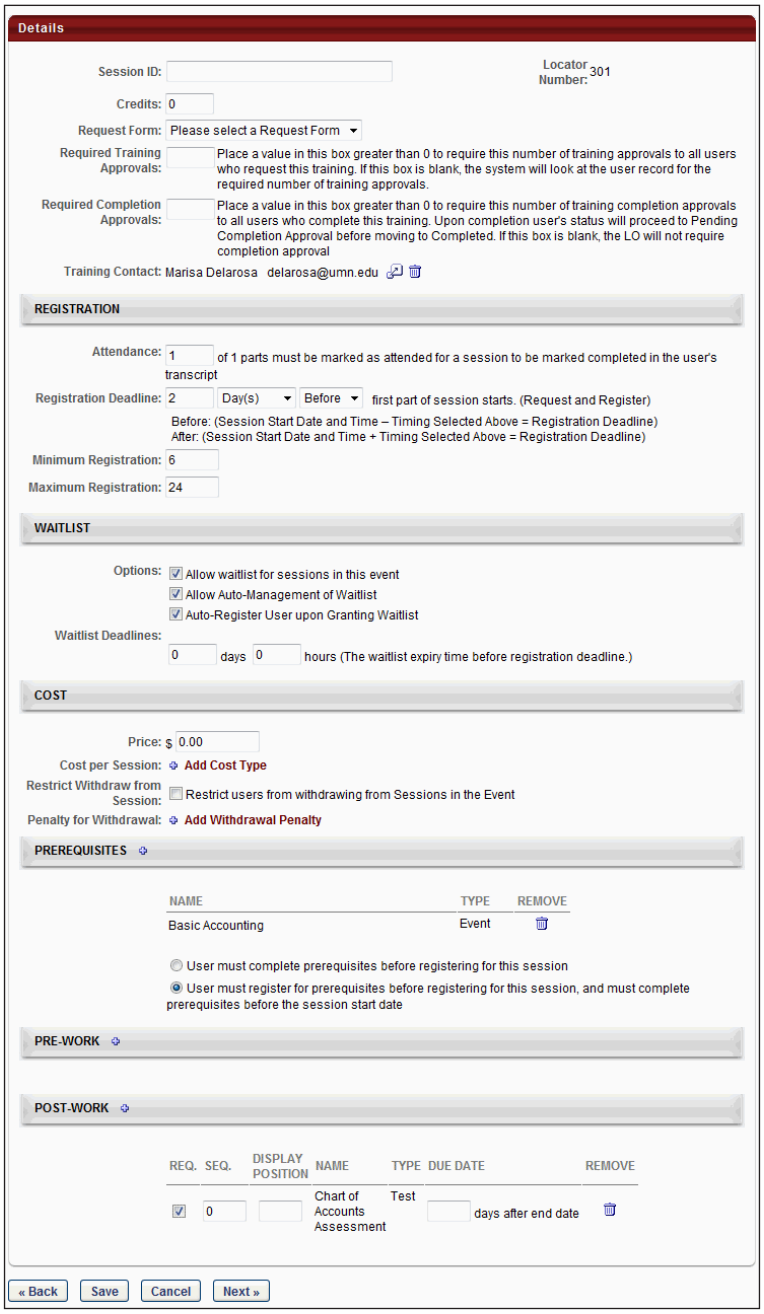
View Events Calendar	Displays the events calendar.
Export to Excel	Exports the parts schedule to Excel.

Create Sessions (cont.)

Check for Conflicts Checks if multiple sessions are being conducted at the same date, time, and location. If a prior session has been scheduled at the same time as the session being created, a message is displayed and session details of the conflicting session are displayed. This message can be bypassed by clicking <Next> or <Save>.

DETAILS

If information was populated in the *Session Defaults* section during event setup, it will automatically pull into the fields on this page. However, it can be overridden on this screen.



Field Name	Description
Session ID	Optional number used to identify the session.
Locator Number	System generated number used to uniquely identify the session.
Credits	Credits learner receives for completion of the session.
Request Form	Form that the learner will complete at the time the session is requested
Required Training Approvals	If approval is required in order for a learner to enroll in this course, up to three approval levels can be set. Approvals are based on management hierarchy.
Required Completion Approvals	If approval is required in order for this course to marked as complete on a learner's transcript, up to three approval levels can be set. Approvals are based on management hierarchy.
Training Contact*	Displays the contact person for the training.
Attendance*	Number of session parts that a learner must attend in order for the session to be marked complete in the transcript.
Registration Deadline	If applicable, enter number of days before or after the session start date when registration should end.
Minimum Registration*	Required. Minimum number of registrants required for the session.
Maximum Registration*	Required. Maximum number of registrants allowed for the session.
Waitlist	Options for allowing and/or managing a waitlist for this course. See the Manage Waitlists section for more information.
Waitlist Deadlines	Optional waitlist registration deadlines.
Price	The learner's cost for the session. Will be billed upon registration.
Cost per Session	Actual cost of the session for the training unit. For reporting purposes, only. Not displayed to the user.
Restrict Withdraw From Session	If selected, a learner must contact the training unit in order to drop the session.
Penalty for Withdrawal	The learner's cost of dropping the session.

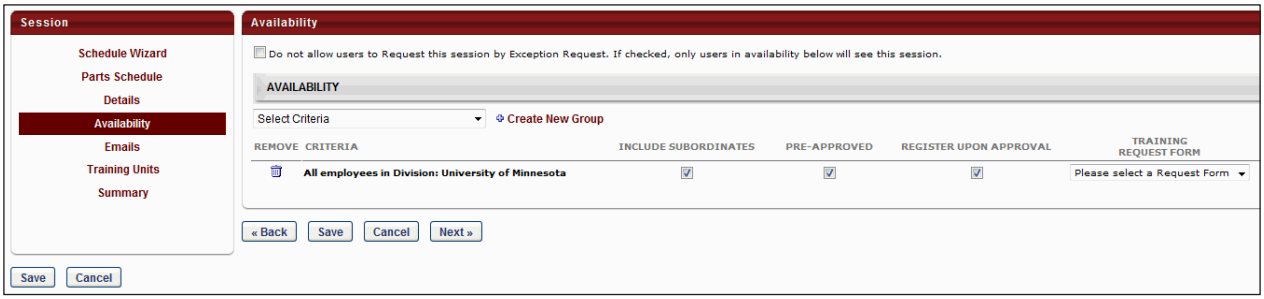
Create Sessions (cont.)

Prerequisites	Training that must be completed prior to taking this course.
Pre-Work	Materials that must be completed prior to taking this course.
Post-Work	Materials that must be completed after taking this course.

AVAILABILITY

Define who can view this course in the catalog. If no Availability is set, the course will not be open for registration. Multiple availability criteria can be set for one course.

All courses should be made available to the University of Minnesota division, unless it is unit-specific training.



Field Name	Description
Do not allow users to Request this session by Exception Request.	Checked by default. If checked, only users in availability below will see this session.
Create New Group	Allows user to set new criteria if existing options do not meet the availability needs.
Include Subordinates	Checked by default. Always select this box to ensure all people meeting the selected criteria can view this session.
Pre-Approved	Checked by default. Select this box to bypass the approval process. Training will appear directly on the learner's transcript in Approved status.
Register Upon Approval	Checked by default. Select this box to bypass the supervisor or manager approval process. Training will appear directly on the learner's transcript in Registered status.
Training Request Form	Select a training request form to attach to this session, if applicable. Refer to the "Appendix D: Training Request Form Administration" for the additional information.

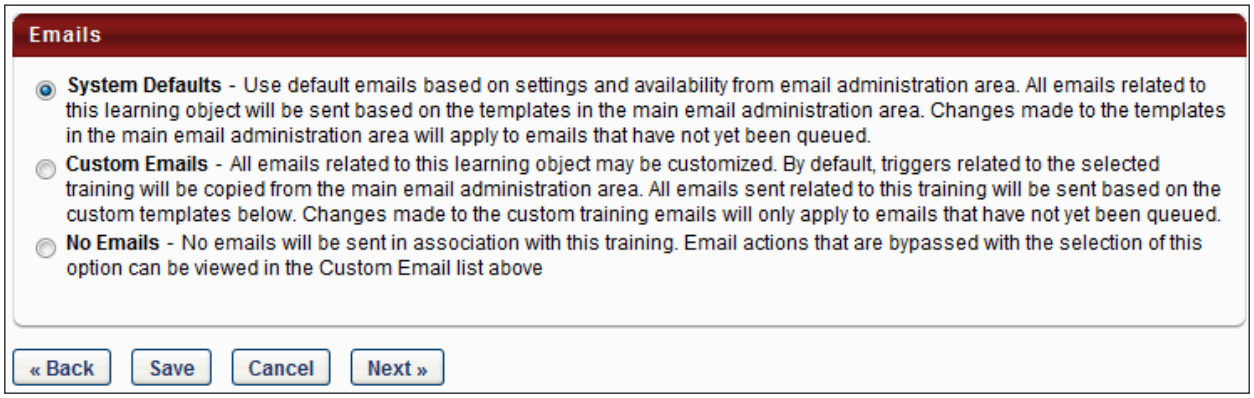
Create Sessions (cont.)

EMAILS

ULearn has an extensive email feature with different categories of emails including Confirmations, Registration, and Marketing. Several default emails have been set up for your use. However, you may choose to customize emails for your training.

Once your emails are set up, they are automatically triggered based on the type of email and the training action in ULearn. Below is the list of default emails.

Note: Training units have the option of turning off the default emails or further customizing the default to meet their needs. Otherwise, emails are automatically triggered.



Field Name	Description
System Defaults	By default, all existing and new learning objects will have the *System Defaults* radio button checked. If checked all emails related to courses will be sent based on the active email templates in the main email administration area.
Custom emails	Click to customize emails for this session. Future emails will be sent based on the settings and templates created within the *Custom Email* selection.
No Emails	If checked, no emails will be sent in association with this training.

Email Delivery

- Emails are sent based on an action or a time frame.
- If an email is based on a time frame (Training is Due, Session Start Date, etc.), the email is sent based on the date of the training or activity. For example, if a session starts in one week at 8:30 a.m., the one week reminder will go out one week prior at 8:30 a.m.
- If the activity is an online class with a due date and two-day reminder email, the two-day reminder will go out two days prior at midnight.

ULearn Default Emails

Assign Training	Learner is assigned an online class, event, curriculum, test, or material. Email is triggered when training is assigned.
Register*	Learner registers for an online class or curriculum. Email is triggered when a learner clicks on the Register link for a training. If the training is set up to be pre-approved and registered upon approval, this email is sent upon clicking <Request>.
Training is Due	Occurs when training is due. When a due date is applied to training, this email will be sent either before, on, or after the due date. This is where the Reminder email type can be especially useful. The Reminder email can be set up to remind the learner within days, hours, and minutes before or after the training is due.
Training is Completed*	This email is sent once the learner has successfully completed a session, online class, curriculum, test, or material.
Assign ILT Session	This email is sent when an ILT session is assigned to learners.
ILT Session Register*	Once a learner registers for an ILT session, this email is sent to the learner.
Grant Waitlist Request	Once a learner has submitted a Waitlist Request, they will remain in Waitlisted status until an administrator makes the decision to grant or deny the request. If the ILT administrator grants a learner's request to attend a session, this email will be sent.
Exception Request	An exception Request is created when a learner submits a request for an Event/Session in which the prerequisites are not met. When this type of request is submitted, the selected recipients will receive this email.
Deny Exception Request	Once a learner has submitted an Exception Request, they will remain in Exception Request status until an administrator makes the decision to grant or deny the request, this email is sent to the selected recipients.
Session Changed*	ILT Session has been changed. Session Changed email is only sent if the following Session fields were changed: Location, Start or End Dates and Times, Instructor, Advanced Registration Deadline, Pre-work/Post-work/Prerequisite, No Show Penalty.

	An email tag called COMMENT appears as an option for this email. This tag will display the comments entered by the Session administrator or instructor when the changes for this Session were saved.
Session Start Date*	ILT Session start date. This is to remind learners of the start date for a session for which they are registered.
Prerequisite is Due	Prerequisite is due for a Session.
Cancel Session	ILT Session is cancelled. REASON.CANCEL.SESSION tag is available for the Cancel Session email so that the reason entered by the administrators when the Session was cancelled can be included in the email. This tag will display the reason selected in the drop-down by the administrator who cancelled the Session.

Launching Training from an Email

Training can be launched via a link from the email by inserting the Email tag. If the tag is used in all emails, it will direct the learner to either their transcript page, a session detail page, or it will actually launch the course. The current plan is to include the email tag in all emails so that if a learner wants to enter the ULearn from the email to look at their transcript or take action, that link will be there.

Confirming an Email was Sent

The system provides a report that can be run and exported to Excel. This report will provide a log of all the emails that were sent in the past 30 days. The report provides:

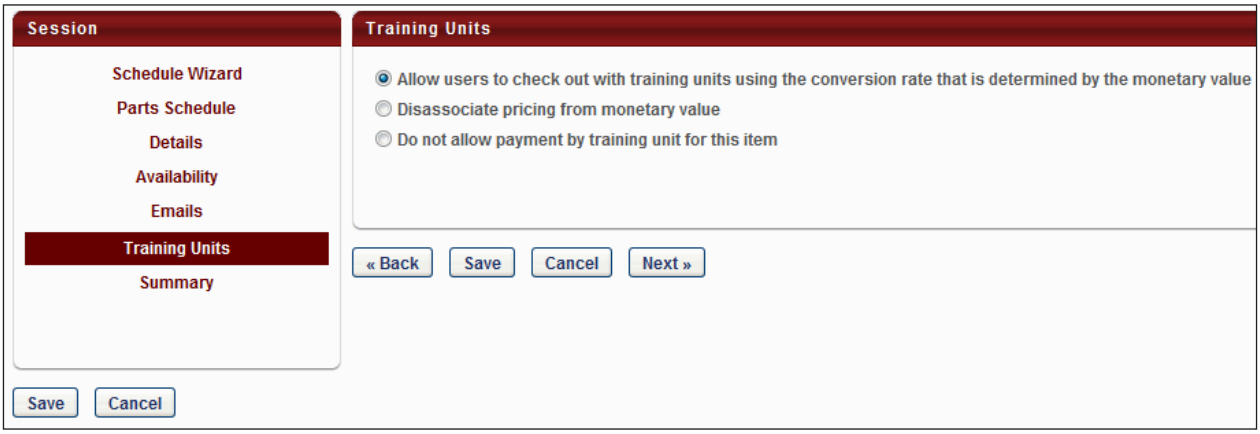
- The email address it was sent to (learner's address)
- The time and date it was sent
- The subject line of the email

This report can be found at Admin > Email Management > Expand icon for email > export to Excel.

Depending on the volume of emails, this report may or may not be useful to training units.

TRAINING UNITS

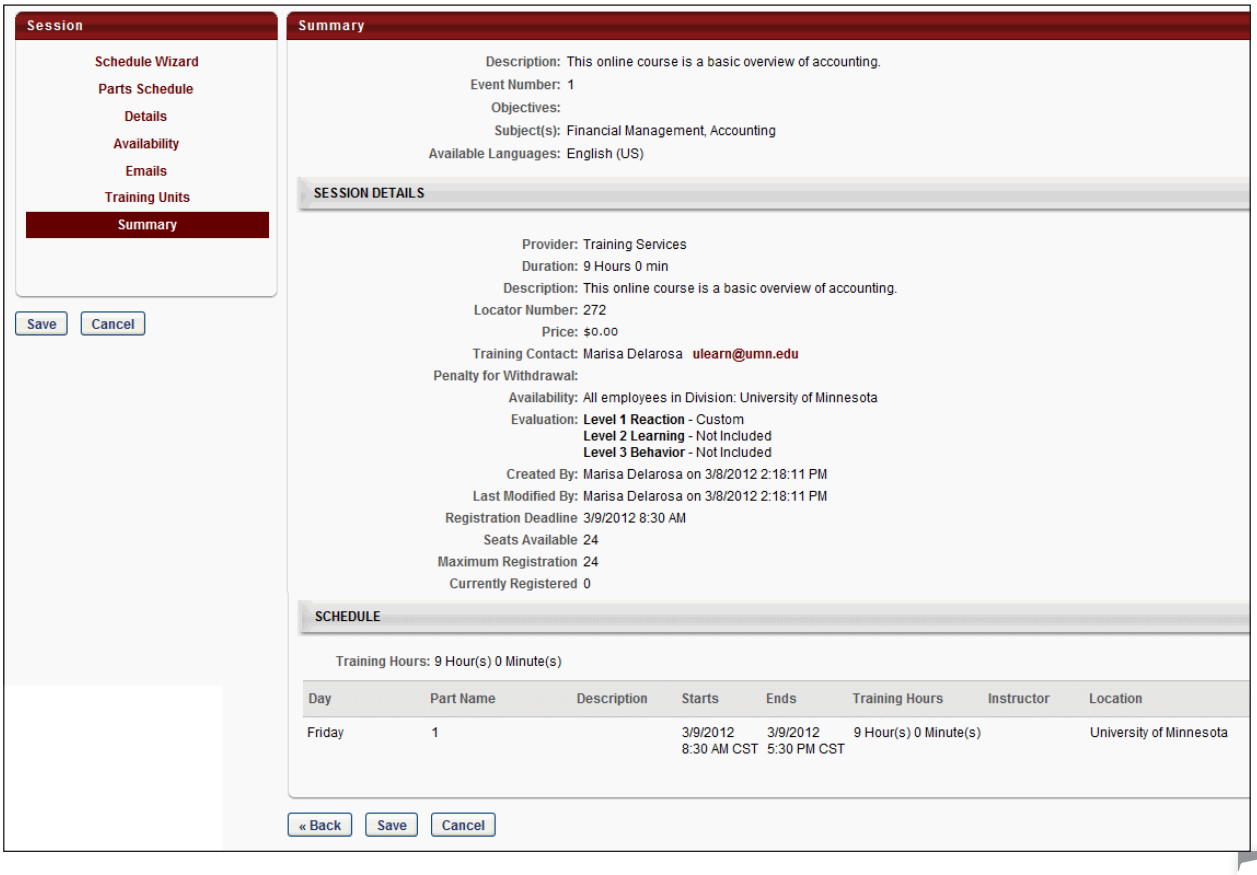
Not used at this time.



SUMMARY

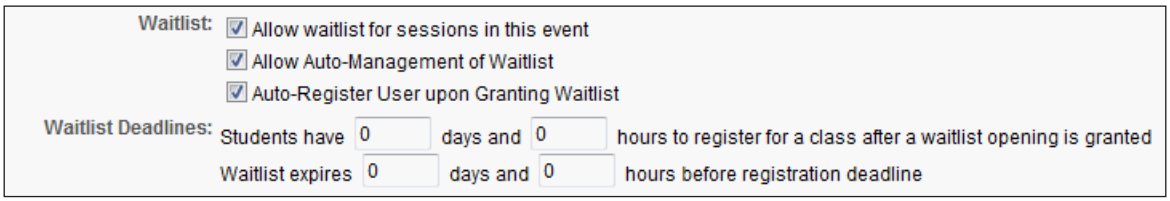
At the top of the **Summary** page, the course details are displayed, followed by the session details.

Review the event and session details and click <Save> to save the session(s).



Manage Waitlists

When creating courses and sessions, there are several options for allowing and managing waitlists.



Field Name	Description
Allow waitlists for sessions in this event	Check this box to allow waitlists. • Users will be added to the waitlist when they register for a session with no seats available. • Each session has a separate waitlist. • If Allow waitlists is not checked for a session, users will be denied when they register for a session that has no seats available.
Allow Auto-Management of Waitlist	Check to automatically grant openings to waitlisted learners. The system manages the waitlist by maintaining a list of waitlisted learners and granting them a seat automatically if one becomes available or if another session is created.
Auto-register user upon Granting Waitlist	Check to automatically register users thereby allowing them to bypass the transcript for registration. This should be used only if you are granting waitlist openings one at a time. If the Auto-Register feature is not on, then a learner who is granted an opening will have their status changed to Registration Pending with the option to Register. The Grant Waitlist Request email may be set up to notify this learner, their manager, and the session administrators that the opening was granted.

Waitlist Deadlines: Students have

Enter number of days and hours a learner has to register for the session when waitlist is granted. If auto-register is on, this deadline does not apply.

- If the opening is granted to all, then the waitlist acceptance deadline is not enforced in order to avoid the possibility of having every learner on the waitlist denied.
- If a learner does not register for a session before the waitlist acceptance deadline passes, their status will automatically change to Denied and the opening will be granted to the next learner on the waitlist, if auto-management is on. An email may be activated to notify the learner of the waitlist acceptance deadline.

Waitlist Deadlines: Waitlist expires

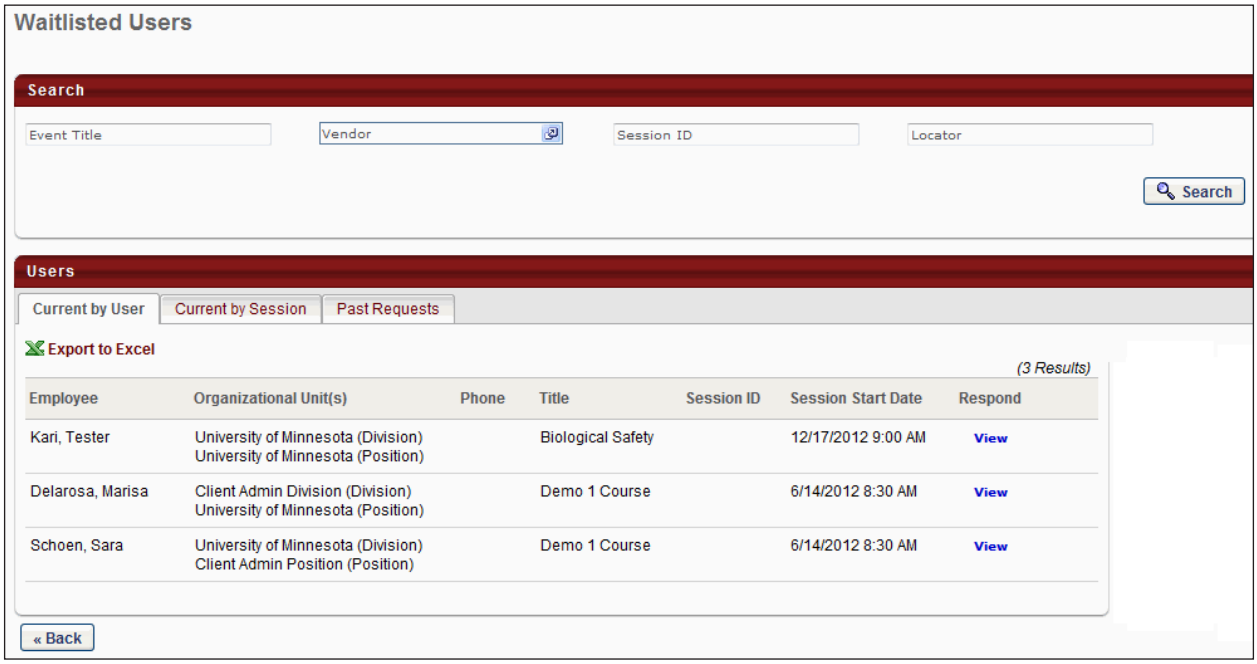
Enter number of days and hours before registration deadline that the waitlist expires. When the waitlist expires all waitlisted learners will have the status Waitlist Expired and receive an email.

- The purpose of having the waitlist expire before the registration deadline is that it creates a period when all learners (on the waitlist or off) can register on a first come first served basis for open seats. This will reduce the risk of having open seats on the session start date.
- An email may be set up to notify learners with Waitlist Expired status when a seat becomes available before the registration deadline.
- Learners with waitlist expired status will have the option to Register or Select Session. If they attempt to register for a class that is full, they will not be denied, they will just see a message that tells them the class is full and that they may attempt to register for open seats when they become available.

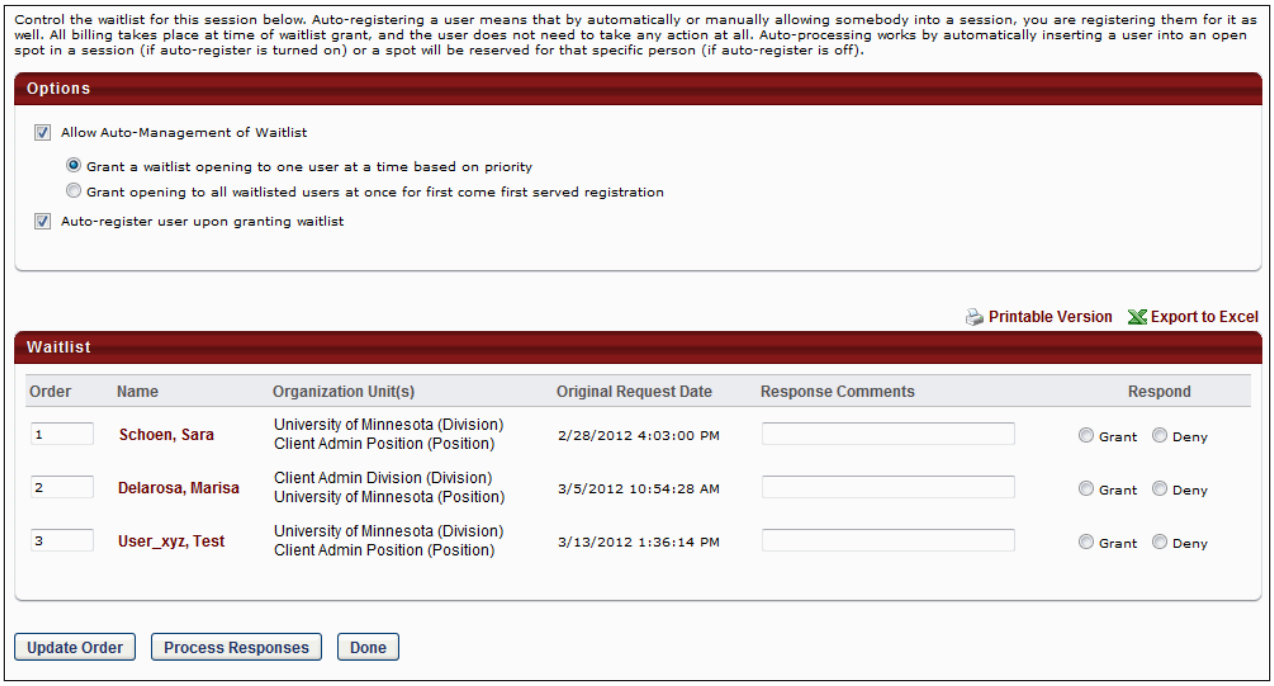
Manage Waitlists (cont.)

WAITLIST MANAGEMENT

Waitlists are managed by clicking the <Waitlist> button at the top of the **Manage Events and Sessions** page.



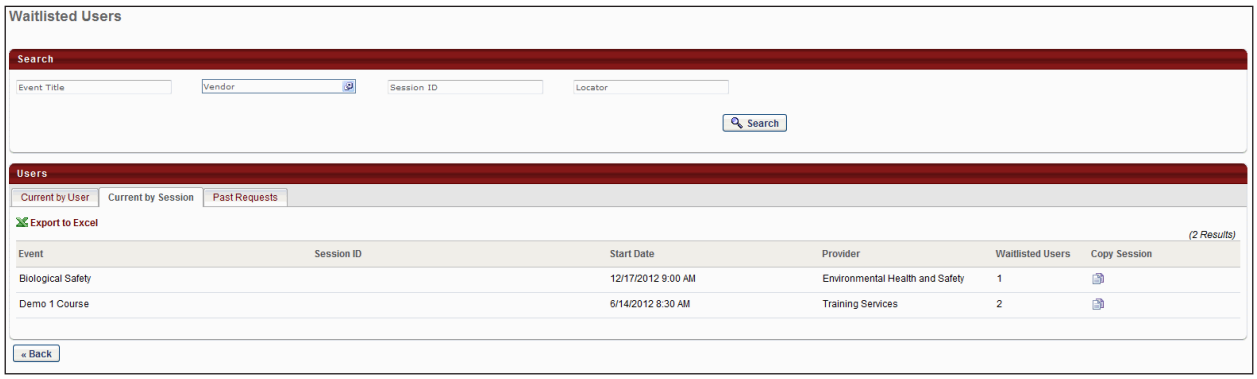
Waitlists can be viewed by user, by session or by past requests. When viewing by user, click <View> in the *Respond* column to see the available options.



There are two options under "Allow Auto-Management of Waitlist":

- Grant waitlist opening to one user at a time based on priority: Select to grant a waitlist opening to one learner at a time based on the waitlist order.
- Grant opening to all waitlisted users at once for first come first served registration: Select to grant waitlist opening to all learners as soon as an opening is available.

A waitlist order can be modified in the *Waitlist* section at the bottom of the screen.



When viewing by session, new sessions can be copied from the existing waitlisted sessions.

Roster Management

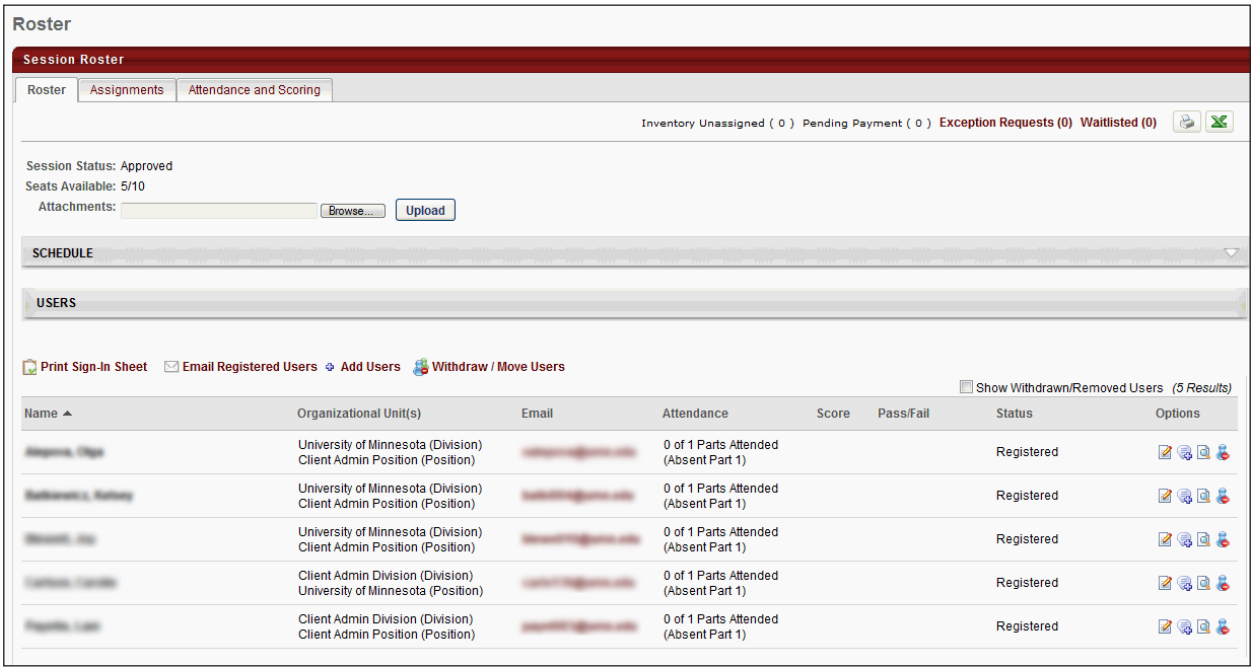
The session roster allows instructors and administrators to see a list of all learners who are scheduled to attend a session, as well as users who would like to attend the session and are awaiting an exception or opening in the class. Learners can be added to or removed from a roster. Administrators can manage assignments as well as attendance and scoring. When the session has concluded, the final roster can be submitted.

There are three possible tabs within the **Roster** page:

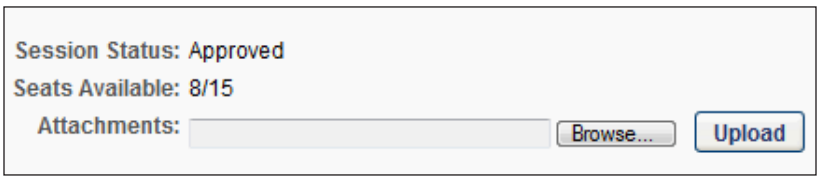
- **Roster**: This is the default tab and is always visible. This tab provides an overview of the session, including roster and schedule.
- **Assignments**: This tab only appears if the session has prerequisites, pre-work, or post-work.
- **Attendance and Scoring**: This tab is always visible and enables the administrator or instructor to track attendance and scoring.

ROSTER TAB

The **Roster** tab displays all of the learners registered for the session along with the session schedule. This tab also contains links to view learners that are on the waitlist or exception requested list for the session. Instructors perform actions on the roster, including printing the sign-in sheet, email registered users, add users, and withdraw users.



At the top of the page, the status of the session is displayed. If the status is Completed, the <Re-Submit> link no longer appears. The Registration value displays the number of registered users and the maximum number of possible users. For example, if a session can have a maximum of 15 learners and 5 have registered thus far, the Registration value displays 5/15, indicating there are 10 remaining open seats.

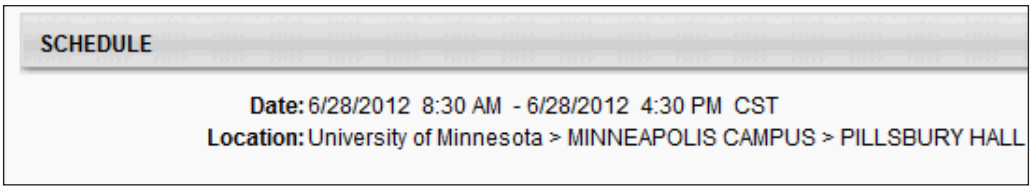


The Attachments feature allows administrators and instructors to add attachments to the roster. Acceptable file types are pdf, jpeg, gif, Microsoft Excel, Microsoft PowerPoint and Word documents. There is no limit to the number of files that can be uploaded to the page. The upload maximum size is 25Mb per item.

In the upper-right corner, the following session action links may appear:

Field Name	Description
Exeption Requested	Displays the number of learners that have a pending exception request. If no exception requests have been made for the session, the link does not appear. After the administrator responds to all exception requests, the link remains visible with zero as the number of learners. Click the link to go to the **Exception Request** page.
Waitlisted	Displays the number of learners that are on the waitlist for the session. If waitlists are not enabled for the event or if there are no learners on the waitlist, the link does not appear. After the administrator responds to all waitlisted learners, the link remains visible with zero as the number of learners. Click the link to go to the **Manage Waitlist** page.

Roster Management (cont.)



The Schedule section appears collapsed by default, but when expanded displays the schedule of the session.

Field Name	Description
Print Sign In Sheet	Opens another window displaying the printable sign-in sheet.
Email Registered Users	Allows emails to be sent to all learners registered for the session.
Add Users	Allows administrators to add learners directly to the session.
Withdraw or Move Users	Allows administrators to withdraw a learner from the session. If the user is withdrawn, they no longer appear on the active roster.
Attendance	Displays the number of total session parts attended.
Score	Displays the learner's score for the session, which is entered by the instructor or administrator on the Attendance and Scoring page. If no score is entered, the value is blank.
Pass/Fail	Displays if the learner passed or failed the session, based on the session settings. If no value is determined, the value is blank.
Status	Displays the learner's status for the session.
Edit Transcript	Click this icon to open the Edit Transcript pop-up, where you can edit the transcript of the learner.
Comments	Click this icon to open the Comments pop-up toview all of the comments for that learner and leave a comment for that learner for the session. The author and date stamp is displayed for each comment.

Comments are limited to 3000 characters. The comment field accepts HTML code.

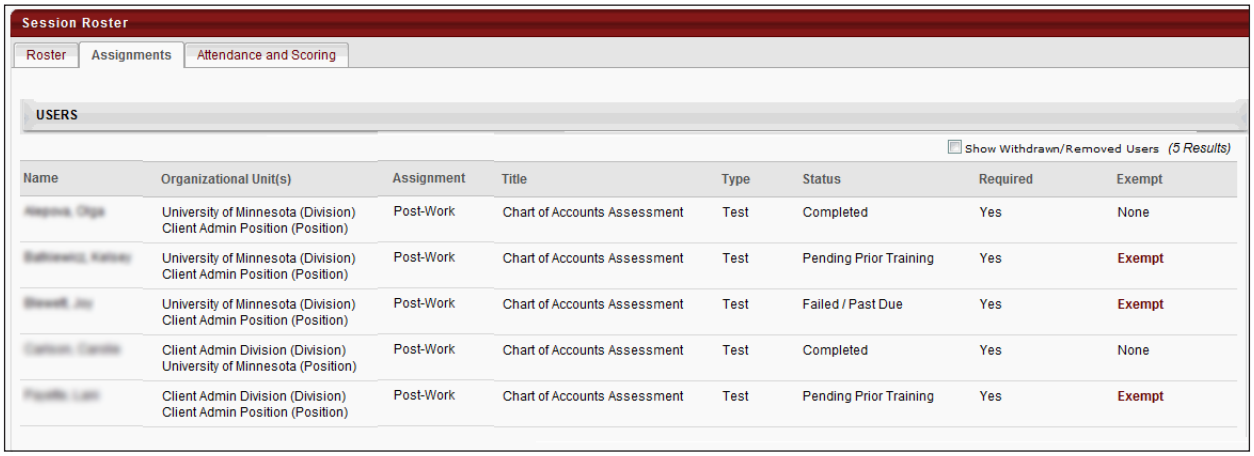
History 

Click this icon to open the History pop-up to view the history of the learner with regards to the session.

Withdraw/Remove

Click this icon to navigate to the **Withdraw Registration** page.

ASSIGNMENTS TAB



Session Roster

Roster | Assignments | Attendance and Scoring

USERS

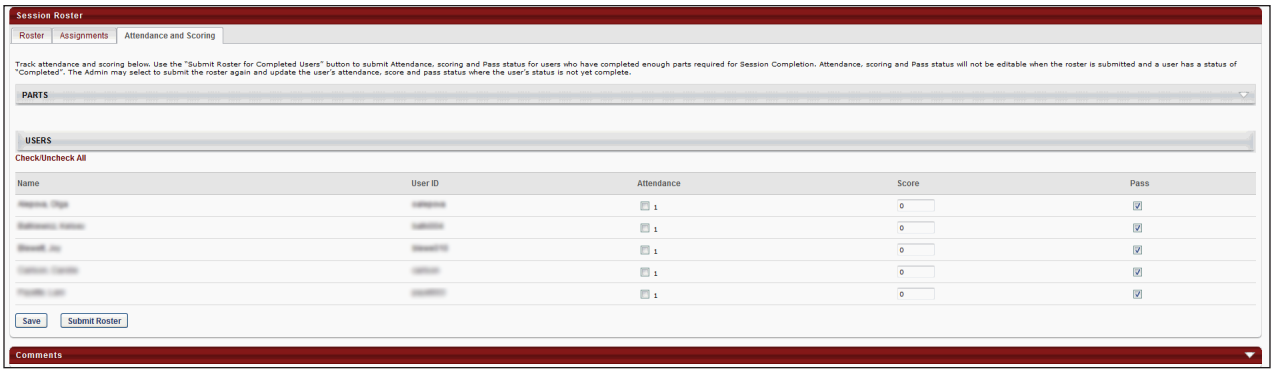
Show Withdrawn/Removed Users (5 Results)

Name	Organizational Unit(s)	Assignment	Title	Type	Status	Required	Exempt
[illegible]	University of Minnesota (Division) Client Admin Position (Position)	Post-Work	Chart of Accounts Assessment	Test	Completed	Yes	None
[illegible]	University of Minnesota (Division) Client Admin Position (Position)	Post-Work	Chart of Accounts Assessment	Test	Pending Prior Training	Yes	Exempt
[illegible]	University of Minnesota (Division) Client Admin Position (Position)	Post-Work	Chart of Accounts Assessment	Test	Failed / Past Due	Yes	Exempt
[illegible]	Client Admin Division (Division) University of Minnesota (Position)	Post-Work	Chart of Accounts Assessment	Test	Completed	Yes	None
[illegible]	Client Admin Division (Division) Client Admin Position (Position)	Post-Work	Chart of Accounts Assessment	Test	Pending Prior Training	Yes	Exempt

The **Assignments** tab displays all of the prerequisites, pre-work, and post-work assigned to each learner that is registered for the session. From this tab, the instructor and administrators can exempt these assignments. If a session does not include any assignments, this tab does not appear. If all assignments are removed from a session after learners are added, the **Assignments** tab is removed for all learners. If the course assignments are edited after creation, the assignments listed may differ depending on when learners request the session. If a learner is missing pre-work or post-work but has attended and passes all parts, the learner's status is In Progress.

ATTENDANCE AND SCORING TAB

Roster Management (cont.)



The **Attendance and Scoring** tab allows administrators and instructors to manage attendance, enter scores, and pass/fail values. In the *Parts* section, each part within the session displays along with the part date and time. Each part is listed with a part number. The part numbers correspond with the *Attendance* option boxes in the Attendance and Scoring table. The *Parts* section is collapsed by default.

In the *Users* section, click <Check/Uncheck All Attendance> to mark each learner as attended for each part of the session. All *Attendance* option boxes that are unchecked will be selected. Click the link a second time to clear all selected *Attendance* option boxes. The <Check/Uncheck All Attendance> link is only visible before the administrator or instructor submits the final roster.

Field Name	Description
Attendance	An *Attendance* box appears for each part within the session. These parts are listed in the *Parts* section above the table. For each part, select whether or not the learner was in attendance. Attendance can only be edited before the final roster is submitted. Once the final roster is submitted, all attendance is final. If a learner has none of the *Attendance* checkboxes selected for a session, their training status is No Show when the roster is submitted and their cost center is charged for the No Show penalty if applicable. If a learner is not marked as attending the minimum number of required parts, their training status is Incomplete when the roster is submitted.
Score	In this field, enter the learner's score for the session. This value must be an integer. These scores appear on the **Roster** tab in the *Score* column. Scores can only be edited before the final roster is submitted. Once the final roster is submitted, all scores are final. Scores are visible to learners on their training details page.

Pass

Select this option to indicate the learner has achieved a passing score for the session. When the final roster is submitted, if this option is selected, the *Pass/Fail* column on the **Roster** tab displays Pass, otherwise it displays Fail. The Pass option can only be edited before the final roster is submitted. Once the final roster submitted, the Pass option is final. If the *Pass* checkbox is not selected for a learner, their training status is Incomplete when the roster is submitted.

<Save>

Click to save any changes made to the attendance and scoring. The button is available as soon as at least one learner is registered for the session, and remains available even after the final roster is submitted. No Show penalties are not charged at this time.

<Submit Roster>

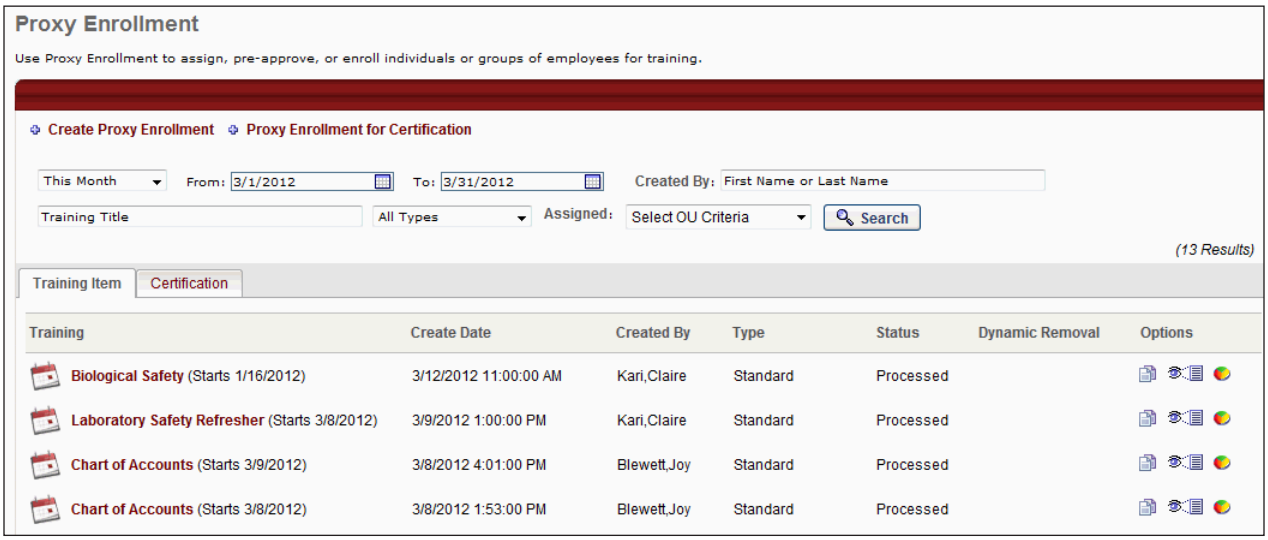
Click to finalize the roster attendance and scores. The <Submit Roster> button is available immediately after the last part of the session is concluded. Once this button is clicked, all learner statuses for the session are updated and appear on the learner's transcript record. No Show penalties are charged at this time if the learner did not attend any parts.

If the administrator adds a part after the roster is submitted, those parts appear for the learner, but show that the learner has not completed the additional part. The administrator cannot mark the learner as attended for the additional part. The attendance status for the new part after the roster is submitted does not change the status for learners who already have a Completed status, but does affect the status for learners who do not have a Completed status.

Proxy Enrollment

Proxy Enrollment is used to directly enroll individuals or groups of learners into training, add users to rosters of sessions held in the past, allow administrators to bypass availability, approvals and prerequisites and to assign specified training to certain employees on a recurring basis. When creating a Proxy Enrollment, administrators can set due dates, define whether learners are to be assigned, approved, or registered directly into training, and configure custom emails for unique notifications specific to the course.

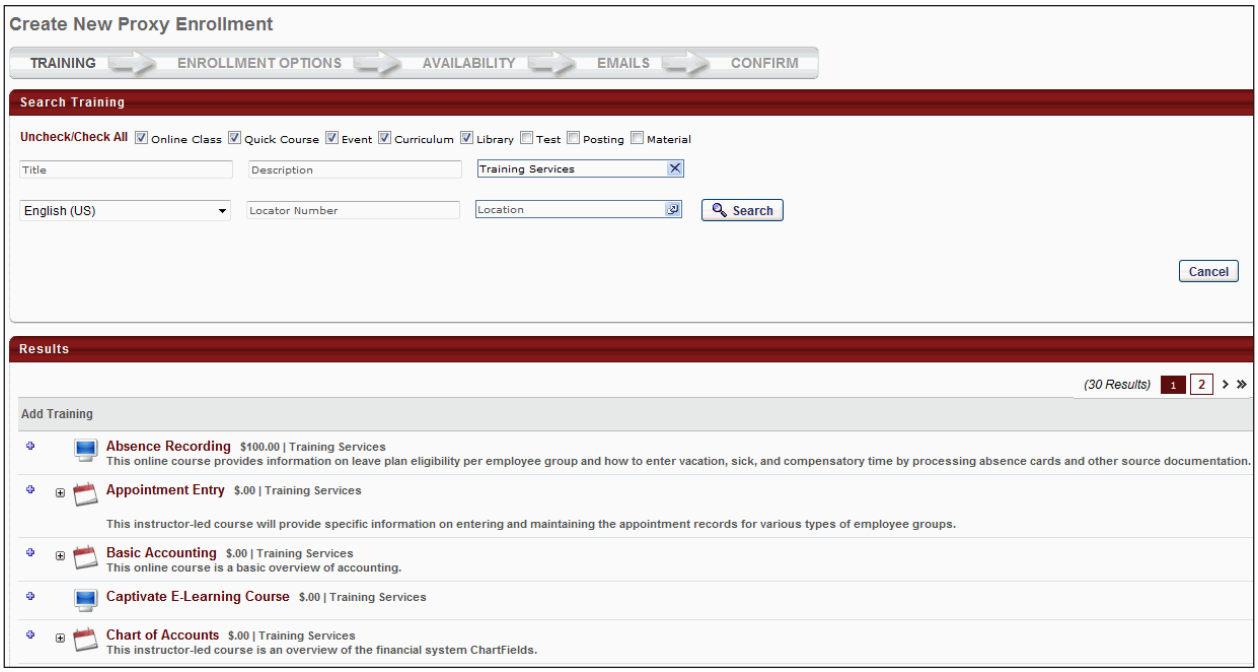
Proxy enrollments are created and managed under **Admin > Proxy Enrollment**.



CREATE PROXY ENROLLMENT

Search for a learning object to add to the proxy enrollment. The following search filters are available:

- Learning Object Type
- Title
- Description
- Provider
- Language
- Locator Number –This field is only available if the Events type is selected.
- Location – This field is only available if the Events type is selected.



Field Name	Description
Add Training	Click to add the training item to the proxy enrollment. Once added, it appears above the search results in the *Selected Training* section in the order in which it is added.
Expand	Appears next to an event with multiple sessions. Click to view the details of each session within the event.

When a learning object is added to the *Selected Training* section, the system determines if there are any prerequisites, pre-work, post-work, or equivalent relationships to another selected training item. If the system identifies an issue, a warning message displays. Note: These are warning messages only. They do not prevent continuing on to the next step.

The possible warning messages are:

- This course has a pre-requisite.
- This course has pre-work.
- This course has post-work.
- This course is equivalent to another selected course.
- This session occurs in the past. If you select other training that is not also a past session, you will only have the status option of Assign, Approve, and Enroll.

Proxy Enrollment (cont.)

Create New Proxy Enrollment

TRAINING → ENROLLMENT OPTIONS → AVAILABILITY → EMAILS → CONFIRM

Search Training

Uncheck/Check All ☑ Online Class ☑ Quick Course ☑ Event ☑ Curriculum ☑ Library ☐ Test ☐ Posting ☐ Material

Title | Description | Training Services

English (US) | Locator Number | Location | Search

Selected Training Hover over warning icon to view full message.

Chart of Accounts — This course has a prerequisite.

ENROLLMENT OPTIONS

Create New Proxy Enrollment

TRAINING → ENROLLMENT OPTIONS → AVAILABILITY → EMAILS → CONFIRM

Training Details (1)

More Information

Enrollment Options

What type of proxy enrollment would you like to apply (Type)?

- ○ Standard (Enroll selected users once.)
- ◉ Dynamic (Enroll users as they meet availability requirements.)
- ☐ Force Initial Enrollment for users who already have the training. (if the proxy is dynamic and recurring, this option only applies for the initial assignment.)

When would you like the training to be assigned (Assignment Date)?

- ◉ Immediately
- ○ Start Dynamic Assignment on:
- ○ Dynamically enroll users each year on: 1 January
- ○ Relative Date: Day(s) From Hire Date

When will training be due (Due Date)?

- ◉ No Due Date
- ○ Each year training is due: 1 January
- ○ Relative Date: Day(s) From Date Assigned

When should the training be re-assigned (Recurrence)?

- ◉ None
- ○ Re-assign training each year on: 1 January
- ○ Relative Date: Day(s) From Registration Date
- ☐ Re-Assign only if previous instance is completed.

When should the recurrence rule terminate?

- ◉ Never
- ○ End rule on:
- ○ End recurrence after occurrences.

Status

- ○ Assign Training (Items may still need approval)
- ○ Assign & Approve Training (Item may not be registered)
- ○ Assign, Approve, and Register (Users will be directly enrolled into training and will have a status of Registered, if the user is not required to pay.)

Field Name	Description
Type	Type of proxy enrollment.
Standard	A one-time assignment to the learners who meet the defined criteria and do not have the training in their transcript. Learners are intentionally excluded from the proxy enrollment assignment when they have the training already on the transcript.
Dynamic	A continuing assignment that enrolls users into training whenever the defined availability is met. Can also be set up as a recurring proxy. The rule continues to be applied and learners are enrolled until the proxy is canceled.
Force Initial Enrollment	Force initial enrollment for learners who already have the training in their transcript in any status. Only applies for the initial assignment if the proxy is dynamic and recurring. Note: This option is not available with sessions. After the initial assignment, the following occurs for learners who later meet the criteria: • If they have never taken the training, they are enrolled. • If they have previously had the training removed, the training is restored on their transcript with an updated due date. • If they have the training on their transcript, they are not enrolled into another instance of the training.
Assignment Date	When the proxy enrollment assignment takes place.
Immediately	Immediately assign the proxy enrollment.
Assign on	Assign the proxy enrollment on a specific date. Note: This option is only available when Standard is selected as the proxy enrollment type.
Start Dynamic Assignment on	Assign the dynamic proxy enrollment on a specific date.
Dynamically enroll users each year on	Assign the dynamic proxy enrollment on the same day each year.
Relative Date	Assign the dynamic proxy enrollment on a specific number of days, months, or years from a certain event (e.g., Hire Date).
Due Date	When the proxy enrollment assignment is due.

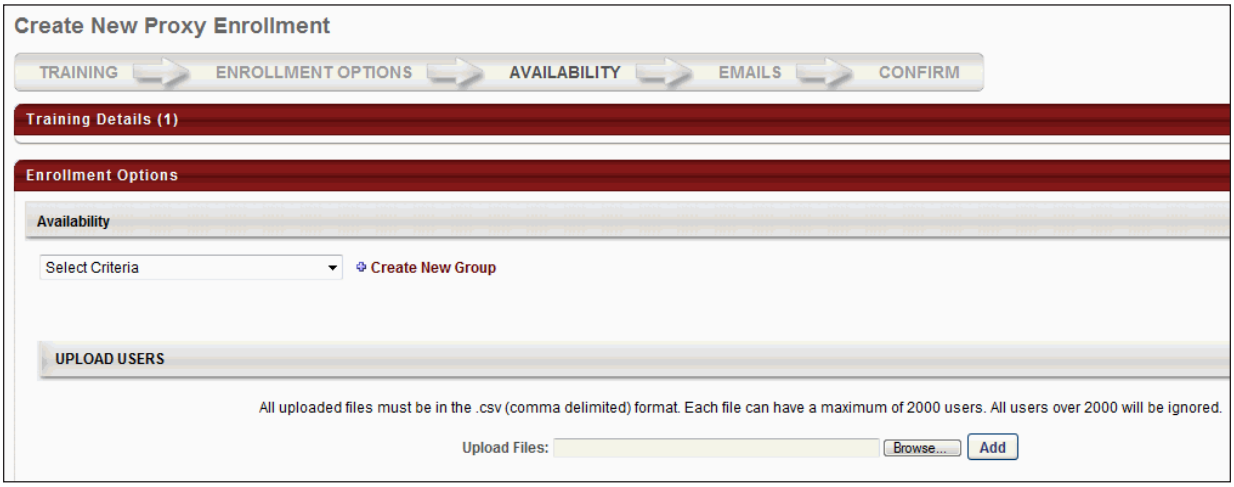
Proxy Enrollment (cont.)

No Due Date	No due date is assigned.
Training is due	Set the due date for a specific date. Note: This option is only available when Standard is selected as the proxy enrollment type.
Each year training is due	Set the due date for a specific date each year.
Relative Date	Set the due date for a specific number of days, months, or years from a certain event (e.g., Hire Date).
Recurrence	When the training should be reassigned to the proxy enrolled users. This option is only available with online training.
None	Assigns the training one time and does not recur.
Re-Assign training each year on	Training will recur on the same date annually.
Relative Date	Training will recur on a specific number of days, months, or years from a certain event (e.g., Hire Date).
Re-Assign only if previous instance is completed	An additional option that can be selected along with one of the recurrence options. If this option is selected, the training only recurs if the learner has completed the previous assignment.
Recurrence Termination	When the above recurrence rule expires.
Never	The recurrence should continue indefinitely.
End rule on	Terminate the recurring proxy enrollment on a specific date.
End recurrence after __ occurences	Terminate the recurring proxy enrollment after it occurs a certain number of times.
Status	Select the status approval requirement.
Assign Training	Assigns the training to the learner. However, approvals are still required, if applicable. Once approved, the learner must click the <Register> link on their Transcript.

Assign & Approve Training	Assigns the training to the learner, bypassing the approval process, if applicable. The learner must click the <Register> link on their Transcript.
Assign, Approve, and Enroll	Enroll the learner for the training, bypassing both the approval and registration process as long as the learner is not required to pay. The learner is only required to launch or complete the training.
Bypass User Payment	Enrolled learners are no longer required to pay if the training has a cost. Learners are automatically enrolled in the training item. On Billing Reports, it appears that the learner was charged but there will be no processing fees.

Proxy Enrollment (cont.)

AVAILABILITY



Define audience or users to be proxy enrolled. Note: A user cannot be assigned a course that already exists on their transcript. If a user is included in a proxy enrollment and already has the course on their transcript, they are not assigned the course a second time.

A list of learners can be uploaded via the Upload Users section. The file must be in .csv format and contain either a list of usernames or User IDs. A maximum of 2,000 learners may be included per file.

Click <Browse>. Select the file. Click <Open> then <Add>.

EMAILS

Create New Proxy Enrollment

TRAINING → ENROLLMENT OPTIONS → AVAILABILITY → EMAILS → CONFIRM

Training Details (1)

Proxy Email Configuration

- LO Specific and Standard Emails
  If emails are configured at the LO level, these will be sent in addition to all emails that do not appear in Email by LO, but do appear in Email Administration. If no email is configured at the LO level, emails will be sent as configured in the Email Administration area.
  - [x] Exclude Request and Assign emails.
  - [x] Exclude Registration email.
- Proxy Emails
  All emails that appear below will be sent as modified. Emails that do not appear below will be sent as configured in the Email Administration area.
- Ad-Hoc Email
  Create a one time email to be sent immediately.
- No Emails
  No emails will be sent in association with this proxy enrollment. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above.

Note: ALL selected emails enter the queue at submission. They cannot be edited after that time.

« Back | Next » | Cancel

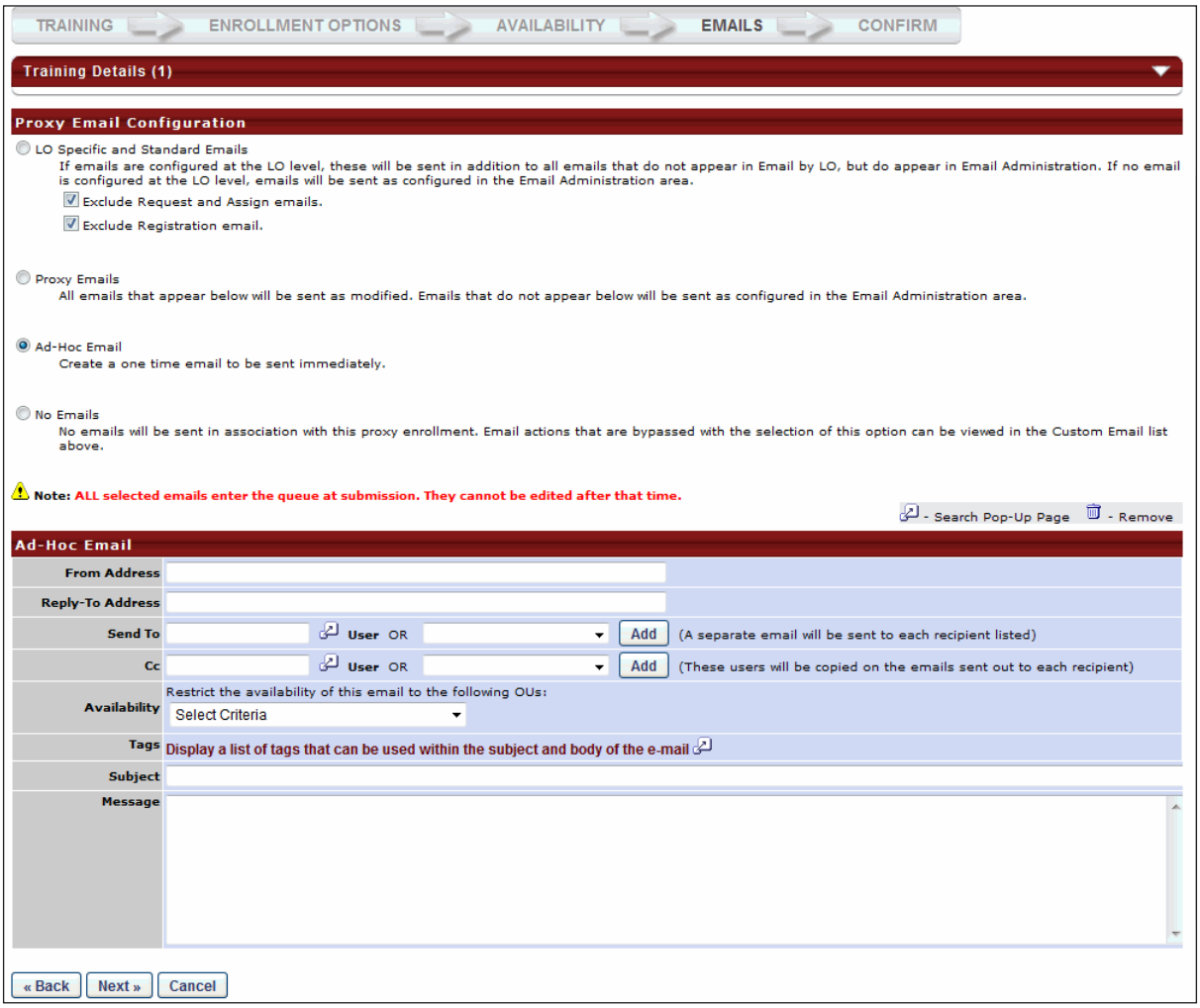
When selecting and modifying emails, the following rules are in place:

- Only active emails at the time of the proxy enrollment submission are used in relation to the enrollment. Future emails continue to use the settings set in this enrollment.
- Both active and inactive emails are copied, and emails may be edited, created, or deleted as necessary. Any modifications made only apply to the current proxy enrollment.
- Each Email trigger will have their standard Email tags available.
- New Email templates may be created for any Email trigger available.
- All applicable active Email templates will be set at the time the proxy is submitted.

Proxy Enrollment (cont.)

Field Name	Description
LO Specific and Standard Emails	Use a combination of learning object specific emails and standard emails. If an email trigger is set at the learning object level, then the learning object specific email is triggered. Any emails that are not set at the learning object level, but are set in Email Administration are triggered using the standard email set in Email Administration. If no emails are configured at the learning object level, then the emails are sent as configured in Email Administration.
Exclude Request and Assign emails	Exclude the request and assign emails.
Exclude Registration email	Exclude the registration email.
Proxy Emails	Copy the emails configured at the learning object level, if available. If no emails are configured at the learning object level, the standard emails are copied from Email Administration that are related to the selected type of learning object. The available emails appear below in the Email Administration section. You can then modify and select appropriate emails for the proxy enrollment. When a single training item is selected for the proxy enrollment, the available emails are unaffected, but when multiple training items are selected, the available emails are affected: • If any combination of Online Courses, Quick Courses, Library items, Tests, Postings, or Curricula is selected, then all of the emails are available. • If an event is included in the selection, then all of the emails are available, but only some of the emails are relevant for an event and will be triggered for the event. • If a session is included in the selection with any other learning object type, then the Proxy Emails option cannot be selected because sessions have different email triggers.

Ad-Hoc Email Create a one-time email that is triggered immediately once the proxy enrollment is submitted. When multiple items are selected, the email is duplicated for each training item.



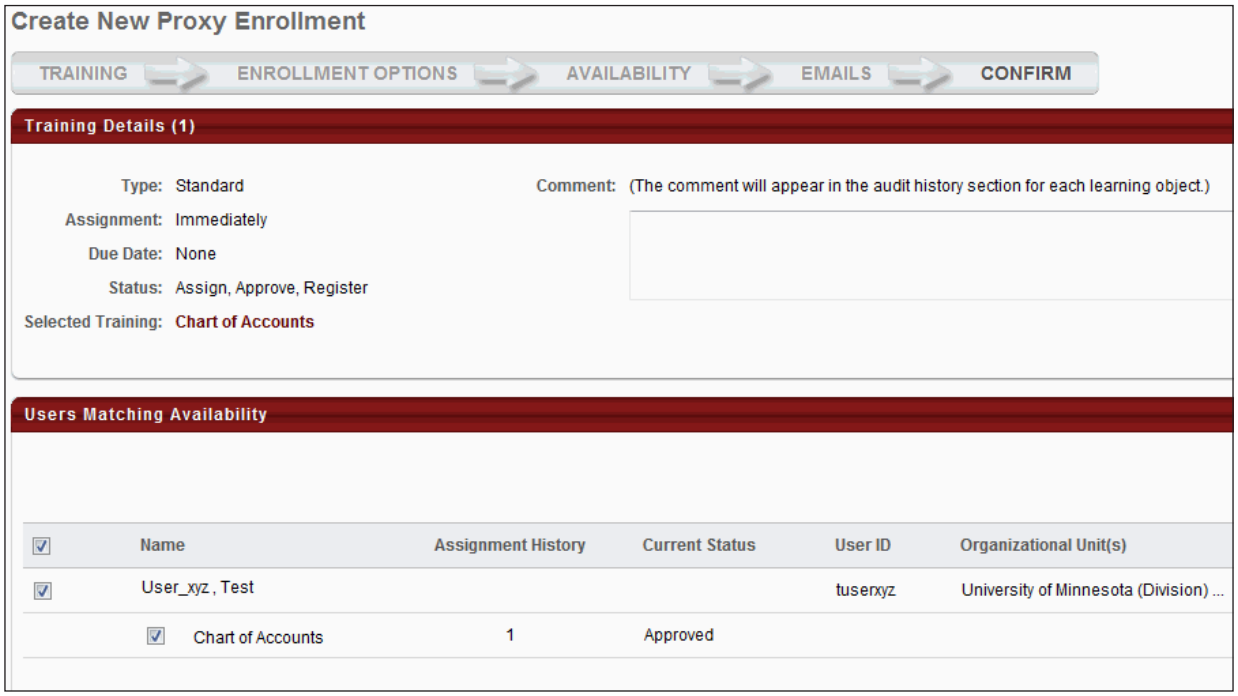
No Emails Do not send any emails in association with the proxy enrollment. No emails are triggered when the training is assigned, approved, completed, due, etc.

Note: All of the emails that are included in the proxy enrollment enter the email queue as soon as the proxy enrollment is submitted. They cannot be modified in any manner once the submission is complete. Verify that all emails are configured as desired prior to submission.

Proxy Enrollment (cont.)

CONFIRM

The Confirm step enables administrators to review and finalize the proxy enrollment settings.



Field Name	Description
Comments	Add a comment for the proxy enrollment that appears in the audit history section for each learning object. The character limit for this field is 100.

USERS MATCHING AVAILABILITY

The current list of learners in the system that match the availability for the proxy enrollment is listed. This section may also display the learners that were loaded using the User Upload Tool. Learners are listed in alphabetical order by last name.

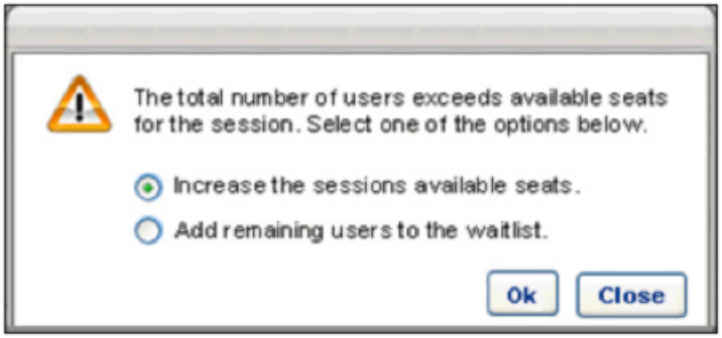
Field Name	Description
Check all users with a current status of complete or an assignment history of zero	Check to indicate that only learners with a status of Complete and an assignment history of zero should be included in the assignment. Any learner that does not meet these criteria is deselected for the corresponding learning object. This option is available if the Force Initial Enrollment option is selected in the Enrollment Options section.
Name	The name of the learner being assigned the proxy enrollment. Below each learner's name is a list of one or more training items listed in the order in which they were added to the proxy enrollment. If applicable, select the checkbox to the left of the training item to assign it to the learner. Deselect the checkbox to exclude the training item from the assignment for that learner. • If the proxy Type is Dynamic and the Force Initial Enrollment option is not selected, then all users and LOs are automatically included in the assignment and cannot be deselected for any LO. • If the proxy Type is Dynamic and the Force Initial Enrollment option is selected, then all users who have never been assigned the LO are automatically selected and cannot be deselected. If a user has previously been assigned the LO, then they can be deselected if necessary. • If the proxy type is Standard, then all users can be selected or deselected for all LOs, regardless of the Force Initial Enrollment option setting.
Assignment History	Number of times the learner has been assigned the associated training item.
Current Status	Learner's status with regards to the corresponding learning object.
User ID	Learner's User ID.
Organizational Unit(s)	Organizational Unit identifier set in the *Availability* section that qualifies the learner for the proxy enrollment.

Proxy Enrollment (cont.)

INSUFFICIENT SESSION SEATS

When proxy enrolling learners into sessions, if a session does not have sufficient seats, the administrator may have the option to add the excess learners to a waitlist or to increase the number of seats for the session.

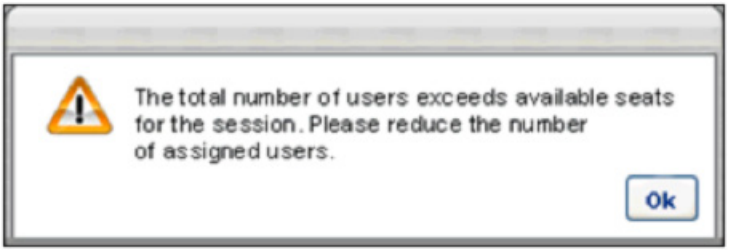
The following pop-up appears, informing the administrator of their options.



Field Name	Description
Increase the session's available seats	Select this option to increase the session's available seats in order to accommodate the excess learners. If multiple sessions are selected, this selection applies to all sessions, if necessary.
Add remaining users to the waitlist	Select this option to maintain the session's number of available seats. Once all seats are filled, the remaining learners are added to the session's waitlist. Note: The system begins assigning users at the top of the user list and moves downward.

The administrator may also click <Close> to reject these options and then adjust the number of selected learners or select a different session.

If the administrator does not have this option, the learners cannot be enrolled. The following pop-up appears, informing them that the number of selected learners exceeds the number of available seats.



COPY PROXY ENROLLMENT

Proxy enrollments can be copied. When a proxy enrollment is copied, the process is the same as when creating a proxy enrollment, except that many of the details are copied from the proxy enrollment that is being copied. All details can be modified during the creation process.

DYNAMIC REMOVAL FOR DYNAMIC PROXY ENROLLMENT

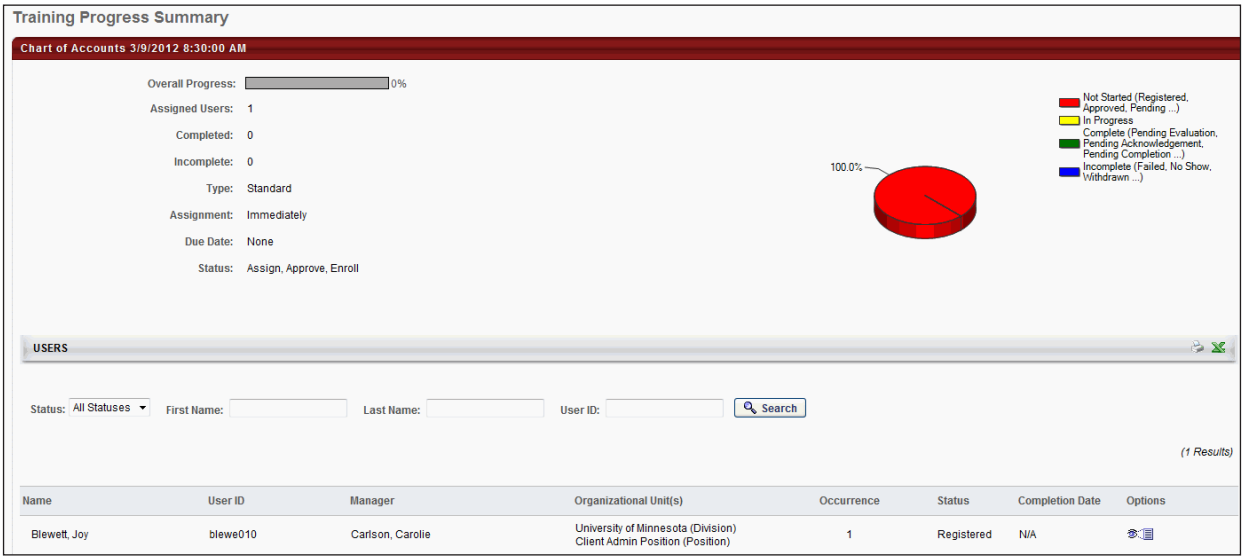
When a learner is assigned a course through a dynamic proxy enrollment and is then dynamically removed from the proxy enrollment, the system behaves in the following manner:

User Transcript Status	Learning Object Removed from Transcript?	Due Date Removed?
Pending Approval	Yes	Yes
Pending Completion Approval	No	No
Approved	Yes	Yes
Pending Payment		
Registration Pending	Yes	Yes
Registered	Yes	Yes
In Progress	No. If a curriculum is removed, the training within a curriculum that is started or completed remains on transcript.	Yes
Past Due	If it is in progress, then it is not removed. If it is not started, then it is removed.	Yes
Failed	No	No
Completed	No	No
Incomplete	No	Yes
Pending Evaluation	No	No
Pending Acknowledgement	No	No
Pending Prerequisite	Yes	Yes
Pending Completion Approval	No	No

Proxy Enrollment (cont.)

TRAINING PROGRESS SUMMARY

The **Training Progress Summary** page displays the status and details of the learners proxy enrolled into the selected training.



Field Name	Description
Training Title	Title of the associated training item displayed in the section heading.
Overall Progress	Bar chart displaying the progress for the assigned learners.
Assigned Users	Total number of currently assigned learners.
Completed	Number of learners that have completed the training.
Incomplete	Number of learners with a Status other than Complete.
Type	Type of proxy for the training (e.g., Standard, Dynamic).
Assignment	Date on which the proxy enrollment was assigned.
Due Date	Due date for the proxy enrollment.
Status	Status option selected in the *Enrollment Options* section during creation.
Recurrence	Recurrence rule used for the proxy enrollment. Displays only if the proxy enrollment is recurring.
Pie Chart	Displays the percentage of learners in each status for the proxy enrollment.

USERS

In the *Users* section, all of the learners that are included in the proxy enrollment are displayed, along with the details regarding their proxy enrollment.

Administrators can search the user list by status, first name, last name, or User ID.

Reports

STANDARD REPORTS

The standard reports feature sorts reports into categories by function.

Navigate to: **Reports > Standard Reports.**

Note: UMReports Training History will provide the complete transcript for a learner and can be found by navigating to: MyU > Key Links > Reporting Center > Human Resources> Training History.

TRANSCRIPT STATUS REPORT

A report that displays the activity on an employee's transcript. This report is run by user or by division (unit) and is set up to be queued in ULearn. Three reports can be "queued" at once.

Transcript Report for Suzi Tester

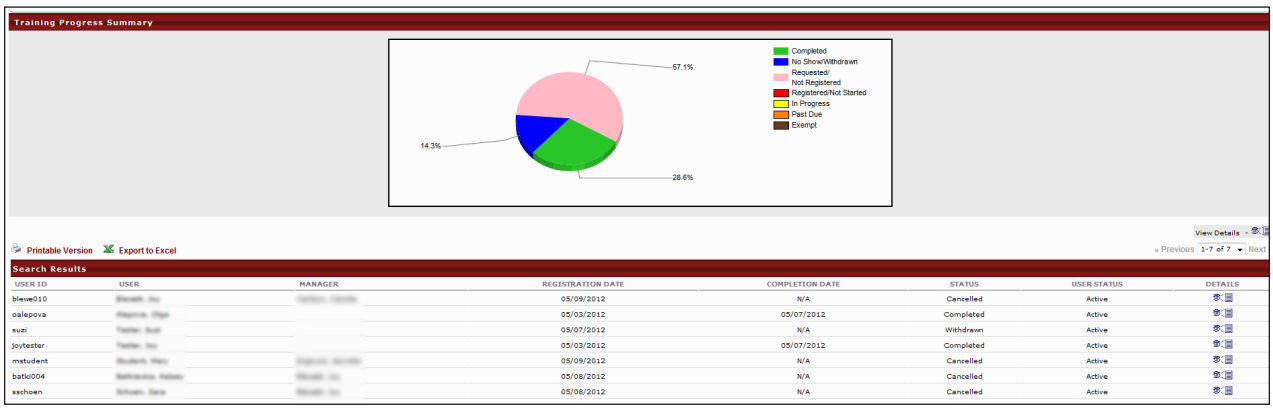
USER	USER ID	TRAINING TITLE	TRAINING TYPE	TRAINING PROVIDER	TRAINING STATUS	TRAINING HOURS	SCORE	CREDITS
Tester, Suzi	suzi	Basic Accounting II Assessment	Test	Training Services	Completed	1 hrs	100	0
Tester, Suzi	suzi	Basic Accounting II Curriculum	Curriculum	Training Services	Completed	1 hrs		
Tester, Suzi	suzi	Basic Accounting II Online Course	Online Class	Training Services	Completed		100	0
Tester, Suzi	suzi	Journal Entry	Event	Training Services	Approved			0
Tester, Suzi	suzi	Journal Entry	Session	Training Services	Withdrawn	13 hrs		0
Tester, Suzi	suzi	Journal Entry	Session	Training Services	Registered	6 hrs 30 min		0
Tester, Suzi	suzi	Journal Entry Curriculum	Curriculum	Training Services	Old Version	1 hrs		
Tester, Suzi	suzi	Journal Entry Curriculum	Curriculum	Training Services	In Progress	1 hrs		
Tester, Suzi	suzi	Marisa's Test Event	Session	Environmental Health and Safety	Denied	9 hrs		2
Tester, Suzi	suzi	Marisa's Test Event	Event	Environmental Health and Safety	Not Started	6 hrs		2
Tester, Suzi	suzi	Marisa's Test Event	Session	Environmental Health and Safety	Approved	7 hrs 30 min		2
Tester, Suzi	suzi	Purchasing From U-Stores	Online Class	EXT-FAM-FR-Parent Education	Registered	30 min	0	0
Tester, Suzi	suzi	Travel Authorization and Expense Reimbursement	Session	Training Services	Denied	1 hrs		0
Tester, Suzi	suzi	Travel Authorization and Expense Reimbursement	Event	Training Services	Not Started			0

Report Criteria

Training Type:	**All**
Training Title:	
Start Date:	5/1/2012
End Date:	5/15/2012
Report Generated By:	Doe, Jane
Report Date:	5/15/2012

TRAINING PROGRESS SUMMARY PIE CHART

Similar to the Transcript Status report, this report shows, in graphical form, the progress of training and can be run by user or any of the Organizational Units.



ENTERPRISE TRAINING REPORT

This report captures training activities by transcript status. It can be run by user or any of the Organizational Units.

TRAINING REPORTS

USER	USER ID	TITLE	VERSION	DIVISION/POSITION	TRAINING PROVIDER	STATUS	REGISTERED DATE	SESSION DATE	DETAILS
[illegible]	[illegible]	[illegible]	2.0	University of Minnesota: Client Admin Position	CEHD - Postsecondary Teaching and Learning	Completed	5/1/2012		
[illegible]	[illegible]	[illegible]	1.0	University of Minnesota: Client Admin Position	Training Services	Completed	5/2/2012		
[illegible]	[illegible]	[illegible]	-	University of Minnesota: Client Admin Position	Training Services	Completed			
[illegible]	[illegible]	[illegible]	2.0	University of Minnesota: Client Admin Position	CEHD - Postsecondary Teaching and Learning	In Progress	5/1/2012		
[illegible]	[illegible]	[illegible]	2.0	University of Minnesota: Client Admin Position	CEHD - Postsecondary Teaching and Learning	In Progress	5/3/2012		
[illegible]	[illegible]	[illegible]	1.0	University of Minnesota: Client Admin Position	Training Services	Completed	5/3/2012		
[illegible]	[illegible]	[illegible]	2.0	University of Minnesota: Client Admin Position	CEHD - Postsecondary Teaching and Learning	Completed	5/2/2012		
[illegible]	[illegible]	[illegible]	2.0	University of Minnesota: Client Admin Position	Training Services	Completed	5/2/2012		
[illegible]	[illegible]	[illegible]	2.0	University of Minnesota: Client Admin Position	CEHD - Postsecondary Teaching and Learning	Completed	5/2/2012		
[illegible]	[illegible]	[illegible]	1.0	University of Minnesota: Client Admin Position	Training Services	Completed	5/3/2012		
[illegible]	[illegible]	[illegible]	1.0	University of Minnesota: Client Admin Position	Training Services	Completed	5/3/2012		
[illegible]	[illegible]	[illegible]	1.0	University of Minnesota: Client Admin Position	Training Services	Completed	5/3/2012	5/4/2012	
[illegible]	[illegible]	[illegible]	1.0	University of Minnesota: Client Admin Position	CEHD - Postsecondary Teaching and Learning	Completed	5/2/2012		
[illegible]	[illegible]	[illegible]	2.0	University of Minnesota: Client Admin Position	Training Services	Completed	5/2/2012		
[illegible]	[illegible]	[illegible]	2.0	University of Minnesota: Client Admin Position	Training Services	In Progress	5/9/2012		
[illegible]	[illegible]	[illegible]	1.0	University of Minnesota: Client Admin Position	Training Services	In Progress	5/9/2012		
[illegible]	[illegible]	[illegible]	1.0	University of Minnesota: Client Admin Position	Training Services	Completed	5/9/2012		
[illegible]	[illegible]	[illegible]	2.0	University of Minnesota: Client Admin Position	Training Services	In Progress	5/9/2012		
[illegible]	[illegible]	[illegible]	1.0	University of Minnesota: Client Admin Position	Training Services	Completed	5/2/2012		
[illegible]	[illegible]	[illegible]	1.0	University of Minnesota: Client Admin Position	Training Services	Completed	5/3/2012		

INCOMPLETE TRAINING REPORT

This report indicates, by employee and course title, if a training has not been completed within 30, 60, 90 or 120 days of registration.

Incomplete Training

Employee	Type	Title	Provider	Status	AGE (DAYS)
Doe, Jane	Curriculum	REQUISITION CURRICULUM	Training Services	In Progress	33
Doe, Jane	Online Class	Basic Accounting Pre-Req Test	Training Services	Registered	33
Doe, Jane	Session	Biological Safety	Environmental Health and Safety	Registered	46
Doe, Jane	Session	Biological Safety	Environmental Health and Safety	Registered	47
Doe, Jane	Session	Decontamination for Safety	Environmental Health and Safety	Registered	46
Doe, Jane	Session	Biological Safety Cabinet	Environmental Health and Safety	Registered	47
Doe, Jane	Session	Biological Safety Refresher	Environmental Health and Safety	Registered	47
Doe_1, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_1, Jane	Session	Biological Safety Cabinet	Environmental Health and Safety	Registered	47
Doe_1, Jane	Session	Biological Safety Refresher	Environmental Health and Safety	Registered	47
Doe_1, Jane	Session	Biological Safety	Environmental Health and Safety	Registered	47
Doe_1, Jane	Session	Decontamination for Safety	Environmental Health and Safety	Registered	46
Doe_10, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_10, Jane	Session	Biological Safety Cabinet	Environmental Health and Safety	Registered	47
Doe_10, Jane	Session	Biological Safety Refresher	Environmental Health and Safety	Registered	47
Doe_10, Jane	Session	Biological Safety	Environmental Health and Safety	Registered	47
Doe_100, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_11, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_12, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_13, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_14, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_15, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_16, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_17, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_18, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_19, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_2, Jane	Online Class	Purchasing From U-Stores	EXT-FAM-FR-Parent Education	Registered	74
Doe_2, Jane	Session	LMS Demo Class 2	Training Services	Registered	49
Doe_2, Jane	Session	Demo 1 Course	Training Services	Registered	49

Appendix A: User Provisioning Application

ULearn is set up to track training for University of Minnesota employees, including faculty, staff, student employees, and temporary employees. Occasionally, however, students and non-University affiliates need to access training in the system. That can be accomplished with the user provisioning application.

The user provisioning application allows students and non-University affiliates to seamlessly create a ULearn account. By default, only faculty, staff, student employees and temporary employees have had accounts created automatically. Students (who are not employees) and others who are not in those categories have had to create their own account using the self-registration process. The user provisioning application allows non-employees to create an account and allows them to search, register and manage their registration in ULearn.

There are two new options that can be used to create an account or sign-in to ULearn for non-University employees.

OPTION 1

Use **https://onestop2.umn.edu/lmsProxy/** to link to websites and emails to direct people into ULearn.

This option is best for units who want to limit access to their training. For instance, people who don't have a University of Minnesota Internet ID wouldn't have access to training with *Availability* set to "Division: University of Minnesota." However, they would be able to access training with *Availability* set to "All Employees in Corporation: Regents of the University of Minnesota" or "Division: Self- Registration Group Division."

Users are asked if they have a U of M Internet ID. If they do, they click <Proceed to University Login> which creates a ULearn account (and a Guest ID) for them. This grants them immediate access into ULearn (and Moodle for online training) even if they haven't created an account previously.

If they do not have an Internet ID, users click <Create an Account> button and go through an account creation process. Once they create their account, the U of M authentication page will appear. They'll use their email address and password they just used to create the account as their Username and password. At subsequent log in attempts, these users should click the <Proceed to University Login> button when asked if they have a U of M Internet ID.

OPTION 2

Use **https://onestop2.umn.edu/lmsProxy/?proceedToLogin** to link websites and emails to direct people into ULearn.

This option is best for units who want anyone with a U of M Internet ID to access all of their training. Users are presented with the U of M authentication page. If they have a U of M Internet ID, they can use that to log in. An Ulearn account will be created for them (along with a Guest ID) if one doesn't exist already. This grants them immediate access into ULearn including Moodle for online training.

Note: **Availability** for training should be set to either "Division: University of Minnesota" or "All Employees in Corporation: Regents of the University of Minnesota" when using this option.

Accounts in ULearn

Both Option 1 and Option 2 create a new ULearn account for users if they do not have one automatically set up. If the user had previously created an account, their training information is recorded on a separate account.

If the same email address, Employee ID or Student ID is used to create the new account, this will trigger a request for the ULearn support team to merge the accounts.

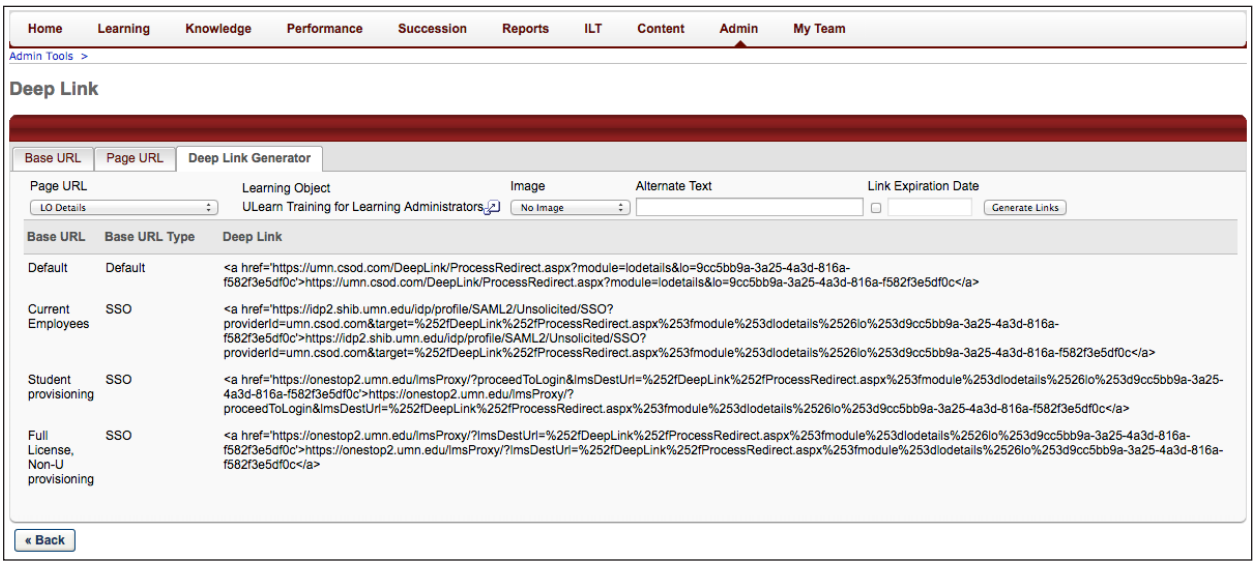
If a different email address or IDs are used to create the new account, the two accounts will remain separate. If the user would like the accounts to be merged, please contact ULearn Support at ulearn@umn.edu. Include the user's name, Internet ID, Employee or Student ID, and email address.

Deep Linking with the User Provisioning Application

The deep linking process changed in March of 2014. Please see the "Deep Linking in ULearn" job aid for information on how to create deep links directly to your courses.

New deep links will be needed for all of your training if you use one of the new access options provided by the User Provisioning Application. The Student Provisioning link can be used for any training with **Availability** set to "Division: University of Minnesota" or "All Employees in Corporation: University of Minnesota".

The Non-U Provisioning link should be used for all training with **Availability** set to "Division: Self- Registration Group Division." Note: This is a new Availability option that you will need to set.



Remember: Pop-up blockers need to be turned off in order to launch online training.

Appendix B: External (Self-Reported) Training

WHAT IS IT?

External Training is the feature that allows a learner to record a training event or activity that has occurred outside of the ULearn system. In other words, it is a training event that did not originate with a ULearn entry.

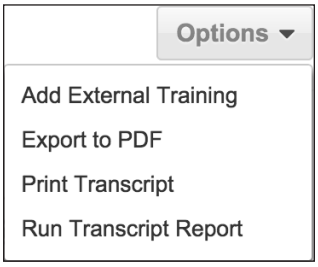
WHEN TO USE IT?

The External Training feature in ULearn is available when a learner needs to report a course taken that qualifies for continuing education credits for a certification. The certification can be a professional certification (such as CPA), or a University certification (such as RCR continuing education credits).

Courses that are required by a unit, a job, or for access should be in the ULearn system and not require self-reporting. This includes things like lab safety training, research education like CITI training, and other departmental trainings.

WHERE TO FIND IT?

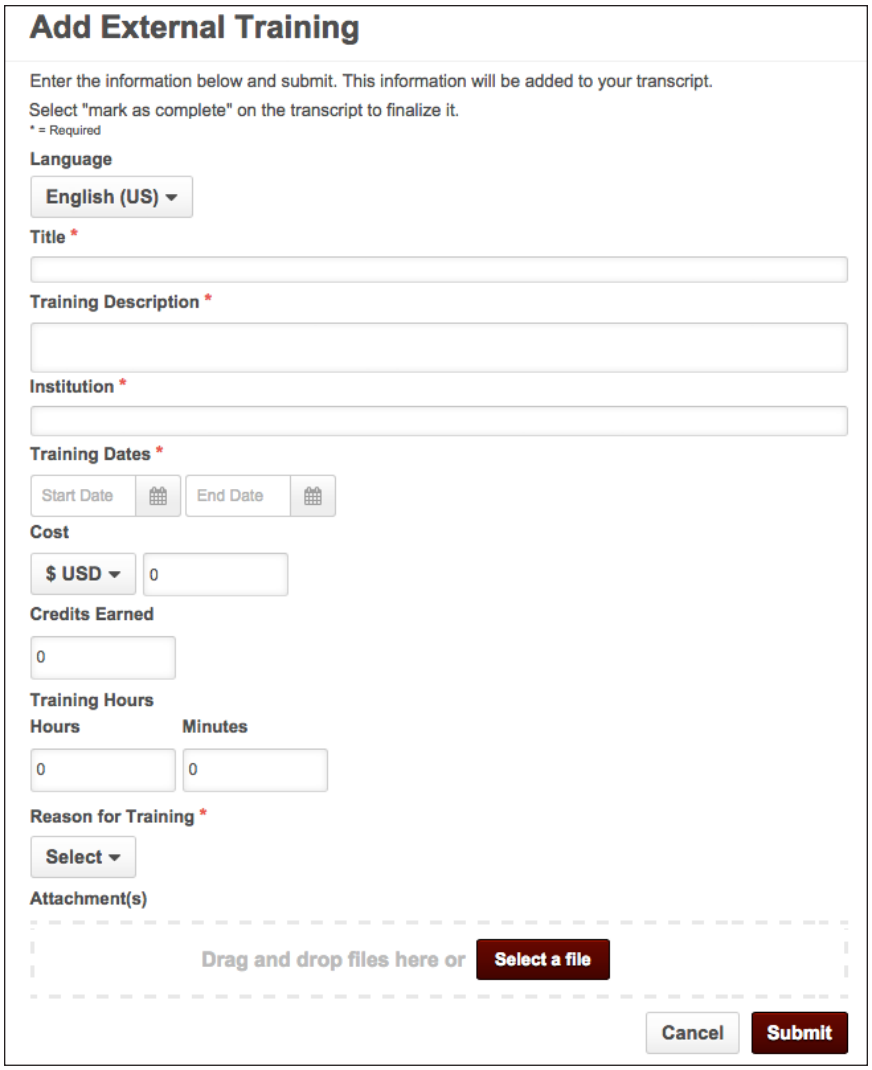
The "Add External Training" feature can be found on a learner's transcript under the **Options** drop-down menu.



HOW TO ADD EXTERNAL TRAINING?

Most of the fields on the external training pop up screen are required. A learner will complete the fields with as much specific detail as possible, including the reason for training, before submitting the entry.

1. Navigate to: **Learning >View Your Transcript**.
    - Alternate navigation: from the ULearn Home page click <Transcript> widget.
2. On the **Transcript** page, click <Add External Training>.
3. Type in the external training *Title*.



4. Type in the *Description*.
5. Type in the *Institution*.
6. Click the calendar icon to select a training start date (*From*) and end date (*To*).
7. Optional. Enter the training *Cost*.
8. Optional. Enter the *Credits Earned*.
9. Optional. Enter the number of *Training Hours*.
10. Click <Submit>. Upon submitting, the external training will record on the learner's transcript with a status of "Approved."
11. On the transcript, in the *Options* column, click <Mark Complete>. The status will now show "Completed."

Note: Your unit may require specific information to be entered in these fields. Please check with your unit to ensure proper recording.

Appendix C: LMS Subjects - Guidelines

In ULearn courses are organized by subject. Below is a list of criteria for using subjects.

- Subjects operate similar to a table of contents.
- Each parent will have multiple child subjects.
- Parent and child subjects cannot be department or course names.
- Every child subject must contain at least two courses.
- Every course must be attached to at least one subject. Courses can be attached to multiple subjects.
- For the most effective search functionality, each course should be attached to the parent subject as well as the child subject.
- The order in which subjects are selected determines the order in which subjects are displayed on the course description.

Subject List

Below is the current parent/child subject list in ULearn:

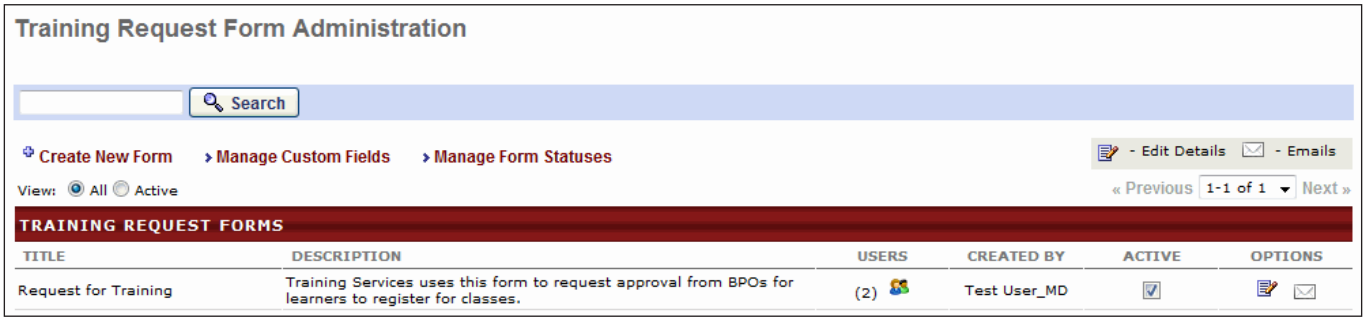
- Data Management
  - Business Intelligence
  - Data and Databases
- Development
  - Career
  - Change Management
  - Customer Service
  - Leadership
  - Management and Supervisory
  - Personal Development
  - Professional Development
  - Project Management
- Diversity, Equity and Inclusion
  - Disability, Access and Accommodations
  - Equal Opportunity in Employment and Education
  - Equity and Diversity Certificate Program
  - Gay, Lesbian, Bisexual, Transgender, Ally
  - Racial Equity
  - Recruitment and Retention
  - Sexual Harassment and Discrimination
  - Universal Design for Instruction
  - Women and Gender Equity
- Facilities and Security
  - Building Security
  - Emergency Services
  - Facilities Management
  - Facility Safety
  - Law Enforcement
- Financial Management
  - Accounting
  - Accounts Receivable
  - Budgeting
  - Purchasing and Disbursements
  - Travel and Expenses
- Health and Safety
  - Animal Care
  - Biological Safety
  - Chemical Safety
  - Environmental Health and Safety
  - Ergonomics
  - Hazard Communication
  - Laboratory Safety
  - Mold and Fungi
  - Occupational Health and Safety
  - Radiation Safety

- Human Resources
  - Compliance
  - HR Policy and Process
  - NEO/New Employee Orientation
  - Performance Management
  - Talent Management
- Research Education
  - Animal Care
  - Human Subjects Protection
  - RCR Continuing Education
  - RCR/Responsible Conduct of Research
  - Research Safety
- Software and Applications
  - Course Management Systems
  - Desktop Publishing
  - File Management and Sharing
  - Library Technologies
  - Mobile Technologies
  - Office Productivity
  - Presentations
  - Social Media and Networking
  - Web and Video Conferencing
  - Web Development
- Student Administration
  - Scholarship
  - Student Financials
  - Student Records

To request a new child subject for use in the ULearn employee catalog, contact ulearn@umn.edu.

Appendix D: Training Request Form Administration

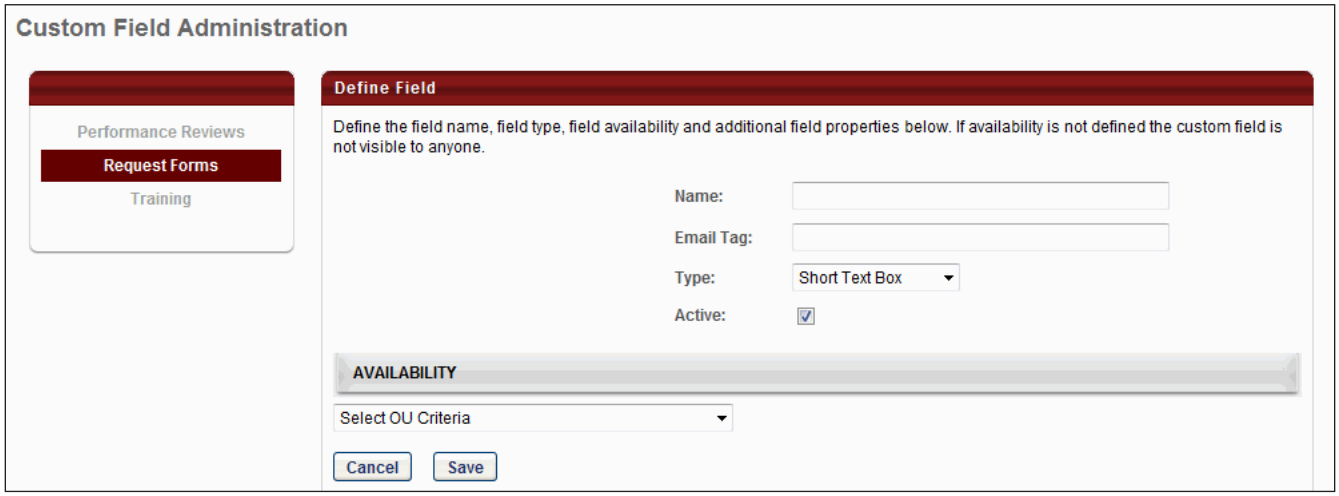
Training Request Forms are designed to obtain additional information from a learner when requesting training in ULearn. The **Training Request Form Administration** page is where administrators can create and manage the request forms available in the system.



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.

CREATING CUSTOM FIELDS FOR TRAINING REQUEST FORMS

To create a Request Form custom field navigate to: **Admin > Tools> Learning> Training Forms.** Click <Training Request Forms>.



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.

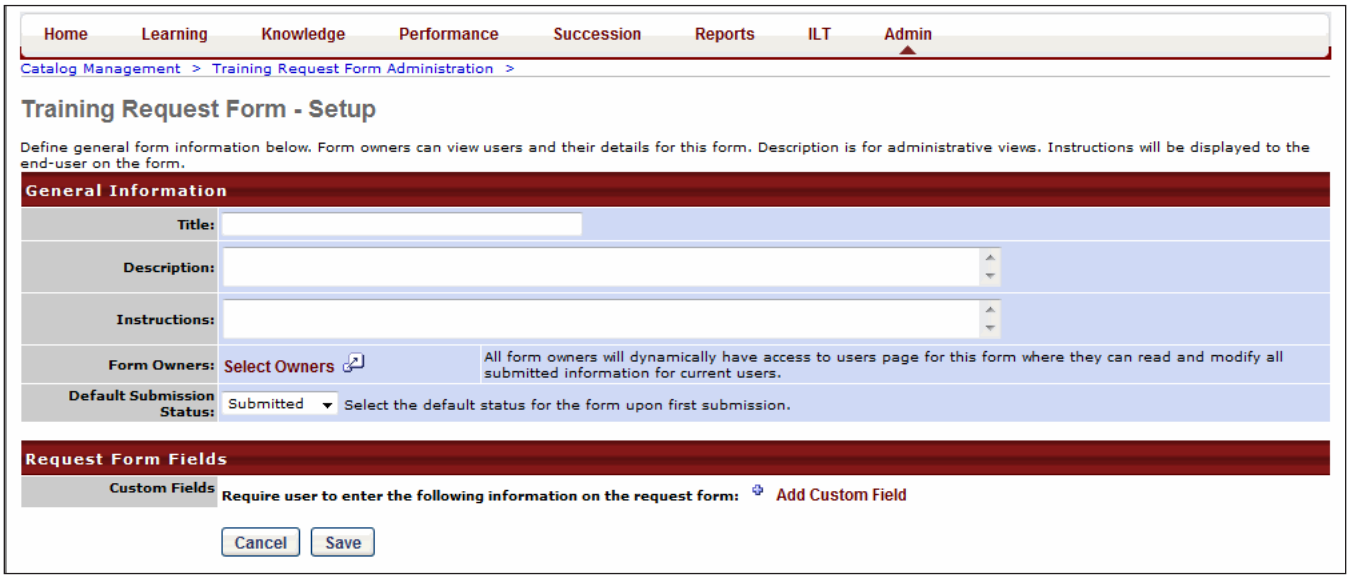
4. Select field Type from the drop-down menu. The following types are available:
    - Checkbox
    - Date Field
    - Dropdown
    - Hierarchy
    - Multiple Checkbox
    - Numeric Field
    - Radio Button
    - Scrolling Text Box
    - Short Text Box

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>.

CREATING A TRAINING REQUEST FORM



1. Navigate to: **Admin > Tools> Learning> Training Forms**. Click <Training Request Forms>.

2. Click <Create New Form>.

3. Enter the following information:

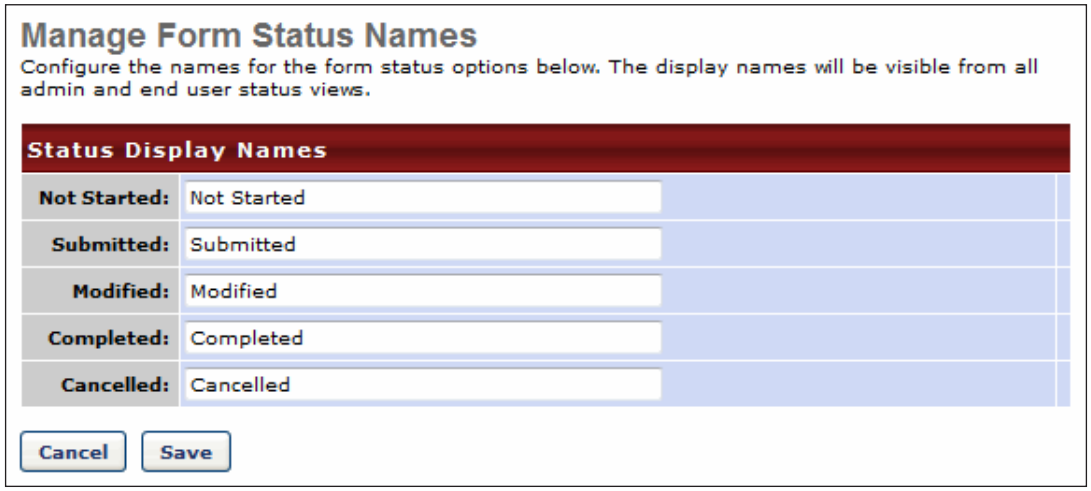
   - *Title*: Enter a title for the form. This is visible when selecting a form to attach to a learning object.
   - *Description*: Enter text that is visible only to administrators. This displays on the **Training Request** page.
   - *Instructions*: Enter text that appears at the top of the form as instructions.
   - *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.
  - 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>.

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.



1. Go to **Admin > Tools > Learning > Training Forms**. Click <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.
5. Click the Edit icon to the left of the learning object.
6. A Training Request form can be added via the **General** tab or the **Availability** tab.
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.

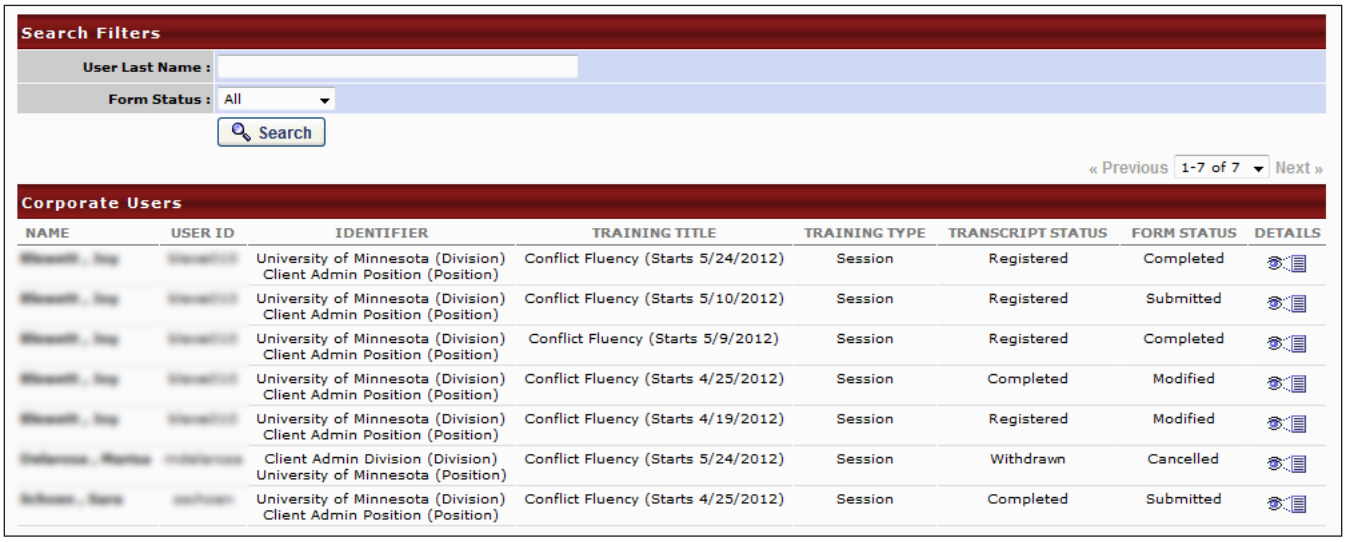
- The Training Request Form displays for learners when they request the learning object. If proxy enrolling the learning object, the learner can access the Training Request Form from the Training Details in the transcript.

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

Appendix D: Training Request Form Administration (cont.)

MANAGING TRAINING REQUEST FORMS

1. Go to the **Admin** page.
2. Click <Learning>.
3. Click <Training Forms>, then click <Training Request Forms>.
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

« Previous 1-7 of 7 Next »

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	

The **Evaluation** module is an effective tool to measure the value of online learning and instructor-led training. It includes a wide variety of question types and response formats. The ULearn system has three types of evaluations available:

Level 1 Evaluation

- Measures the participant's reaction to the course.
- Has a default evaluation available.

Level 2 Evaluation

- Measures the amount of knowledge the participant gained.
- Two options are available as a pre and/or post test: a basic knowledge evaluation or a scored evaluation. The scored evaluation has the following options available:
  - setting a time limit
  - setting a passing score
  - setting review options for the participant

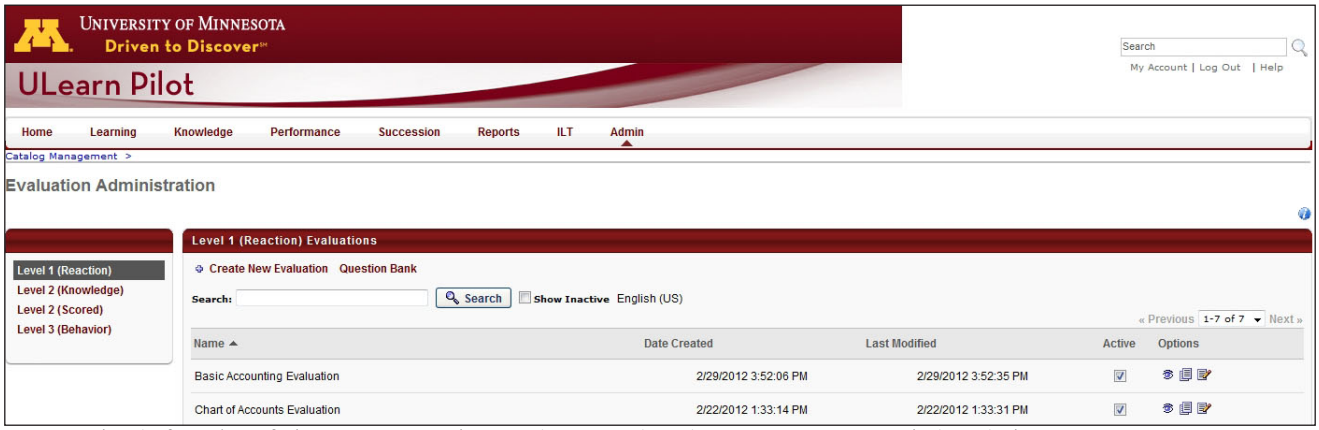
Level 3 Evaluation

- Measures behavior (how well the participant transferred knowledge to job).
- Three options for evaluators are available: student, student's manager, and student's subordinates.
- The following options are available:
  - setting a post-distribution time frame
  - setting a deadline for evaluation completion

There are three steps to managing these evaluations: managing the question bank, creating an evaluation, and attaching an evaluation to a learning object.

MANAGING THE QUESTION BANK

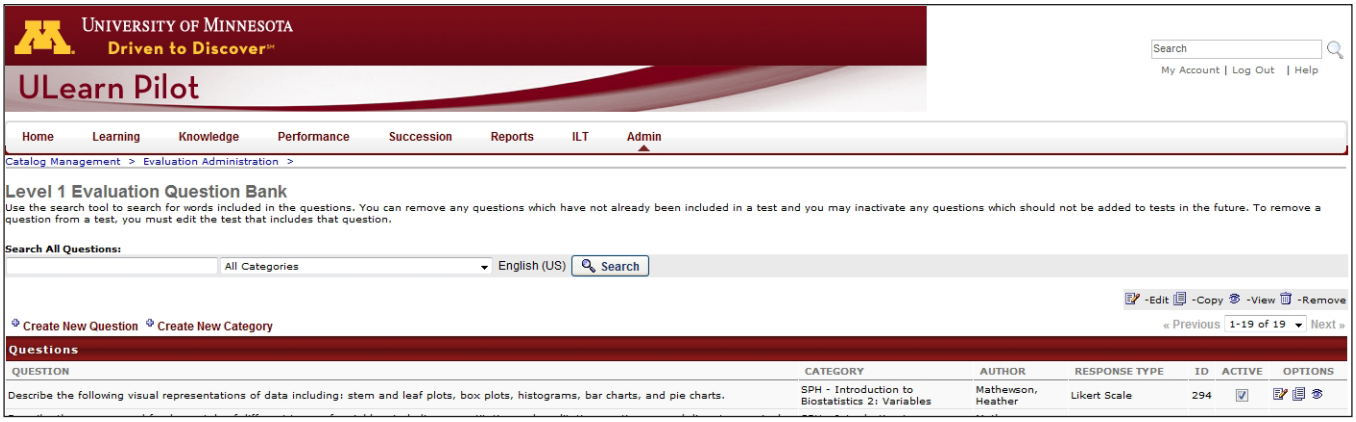
To create questions in a Question Bank navigate to: **Admin > Catalog > Evaluations.**



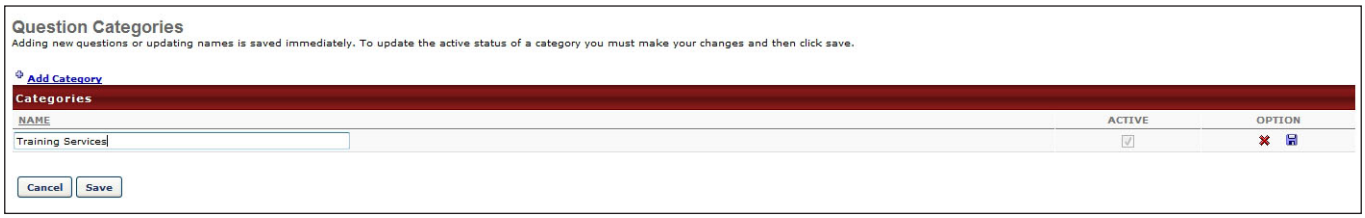
On the left side of the page are the evaluation level options. On each level there is a Question

Bank. IMPORTANT: The Question Bank needs to be populated with questions pertaining to that level of evaluation before an evaluation can be created.

1. Select an evaluation level.
2. Click <Question Bank>.
3. Click <Create New Category> if a category has not been established yet. All questions must be attached to a category. The category is the department or administrative unit that owns the training.



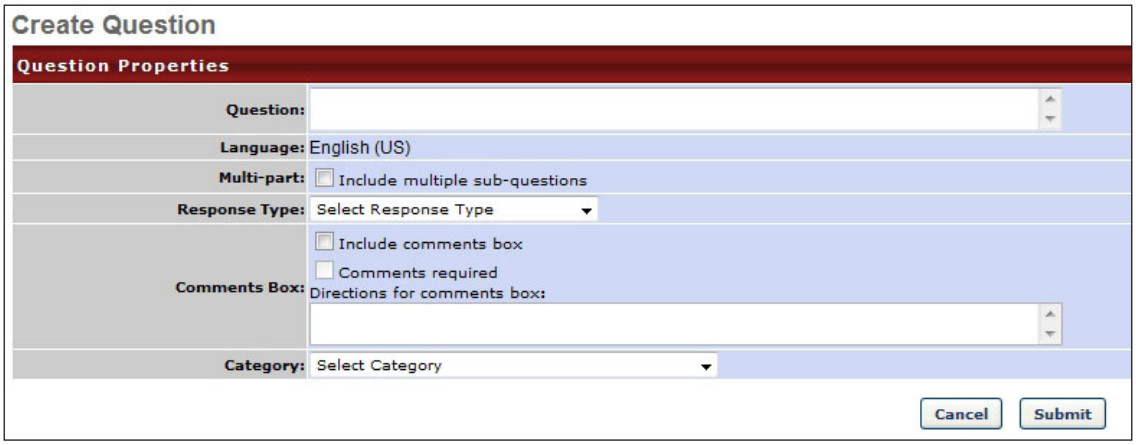
4. A new tab or window will open up in the web browser. In that window, click <Add Category>.



5. In the blank field, enter the name of the department or administrative unit that owns the training. IMPORTANT: Look through what has already been created to make sure you are not entering a duplicate.
6. Click the disc icon on the right side under *OPTION* to save the Category in the Question Categories Bank.
7. Click <Save> at the bottom of the page to return to the main Question Bank window.
8. Click <Create New Question>.
9. Enter the *Question* in the text box.

10. If applicable to the question, select *Include multiple sub-questions*.

    - Click <Add Sub-Question>. A text box will appear to enter the sub-question, as well as options to remove or re-order sub-questions. A sub-question is in addition to the evaluation question; you are not entering a new evaluation question. Both the main question and sub-question will have the same response type.



11. Select the **Response Type** from the menu:

    - Yes/No: answers are Yes or No.
    - True/False: answers are True or False.
    - Likert Scale: answers are on a default scale of Strongly Agree, Agree, Neutral, Disagree, and Strongly Disagree. If there is a need to edit, be sure that the new scale matches progression of the default scale. Note: the Likert Scale option is not available for scored Level II Evaluations.
    - Multiple Choice: choose either Single or Multiple Answers:
        - Single Answers creates a multiple choice question that allows only one answer to be chosen.
        - Multiple Answers creates a multiple choice question that allows multiple answers to be chosen.
        - Click <Add Response Choice> to enter the answer choices. A text box will appear to enter the answer, as well as options to remove or re-order the answers. Additional options can be selected to display an answer for "None of the Above" or "All of the Above."
    - Text Only: answers allow text entry.

12. If applicable to the question, add a *Comments Box* and directions on what to enter. If *Comments Box* is marked required, participant cannot submit the evaluation until comments are entered.
13. Select a **Category** from the menu (required).
14. Click <Submit>.

IMPORTANT:

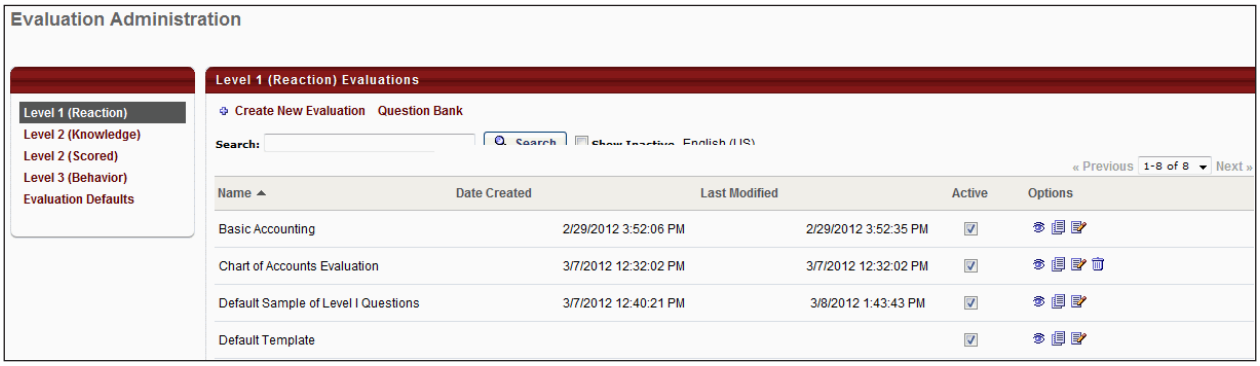
If a question edit is a minor typo that doesn't change the meaning of a question or change the answers in any way, updating it may have little impact to the evaluations that have already been distributed and used.

If a question OR answer needs to be removed, added, or changed in any way, a new question needs to be created and the old question changed to inactive status. This ALSO means a new evaluation needs to be created and the old one changed to inactive status.

Following this best practice ensures integrity of the evaluation delivery and reporting results process.

CREATING AN EVALUATION

Evaluations are set up under **Admin > Catalog > Evaluations**.



Question categories must be set up in the Question Bank before creating questions. In addition, questions are stored based on the evaluation level for which they are used.

Evaluations must be made active in order to assign them to courses.

Default evaluations are assigned to each course, though custom evaluations can be used, instead. Evaluations are set at the course level, but can also be edited at the session level.

Evaluations can be managed in two locations:

A. Navigate to: **Admin > Catalog > Evaluations.** Search for the

evaluation, then click the Edit icon.

B. Navigate to: **ILT > Manage Events & Sessions.** Search for course, then click the edit icon under the *Evaluations* column to edit evaluation.

Activate each evaluation that you would like to attach to this course. The standard corporate evaluations will be used by default, but you may create a custom evaluation by editing the default. If you later decide to replace a custom evaluation with the default then you will not be able to retrieve the old custom evaluation.

- Preview - Select Custom - Restore Default

Evaluations

EVALUATION	ACTIVE	REQUIRED	INCLUDE PRE-TRAINING	PREVIEW	TITLE	TYPE	OPTIONS
Level 1 - Reaction Evaluation	☑	☐	N/A		Basic Accounting	Custom	
Level 2 - Learning Evaluation	☐	☐	☐	N/A		Default	
Level 3 - Behavior Evaluation	☐	N/A	☐	N/A		Default	

« Back Submit

Field Name	Description
Active	This box must be checked in order for an evaluation to be made available to a learner after completing a course.
Required	Checking this box indicates the evaluation must be filled out by a learner in order for the course/session to be marked as complete. The learner's status will be Pending Evaluation until the evaluation is complete.
Include Pre-Training	Checking this box indicates a pre-test should be taken before attending training. This can only be used for Level 2 or Level 3 evaluations.
Preview	Opens the learner's view of the evaluation in a pop-up window.
Select Icon	Click to select a custom evaluation.
Restore Default Icon	Click to return to using the default evaluation.

Appendix E: Managing Evaluations (cont.)

To create an evaluation navigate to: **Admin > Catalog > Evaluations:**

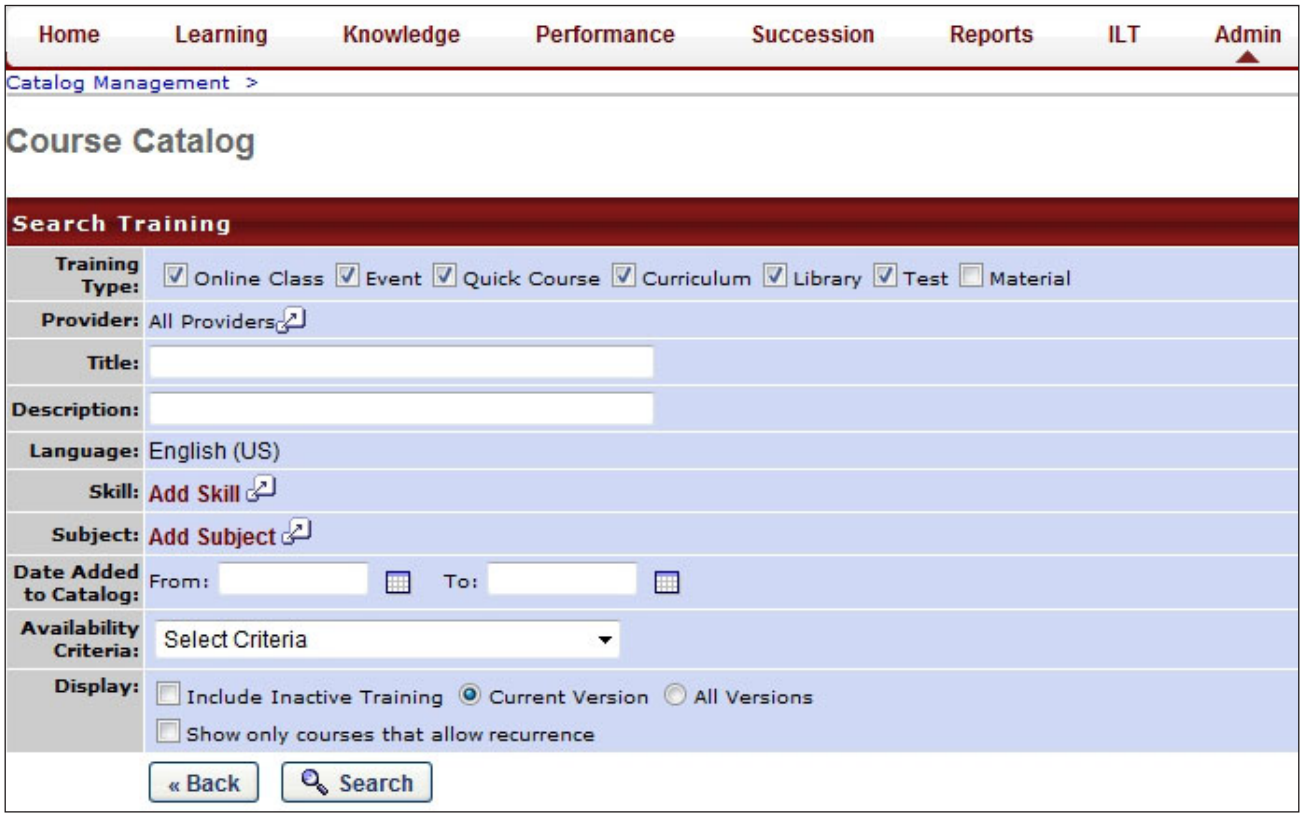
1. Select an evaluation level.
2. Click <Create New Evaluation> or click the Copy icon to copy an existing evaluation.
3. Enter title for evaluation in *Evaluation Name*.
4. Enter *Directions* for participants. These will display on an introduction page before the participant gets to the evaluation. If nothing is entered here, the introduction page will be skipped and the participant will go directly to the evaluation.
5. Add Section: each section is considered a page break on the evaluation and at least one section is required:
    - Enter title for section in *Section Title*.
    - Enter *Section Directions* for section that will display underneath the section name on the live evaluation.
    - Click <Done>.
    - Click <Edit> to edit name or description for a section.
    - Click <Remove> to remove a section. This will also remove all questions in this section.
6. Add Question: any new questions added using the add question icon will append to that specific section of the evaluation:
    - Search for question by name, category, or from an evaluation from an existing course (by searching for the course in *Select Course to View Questions From:* field).
7. Click <Add> to add individual question, or click <Add All Questions> to add all questions from search results.
8. Click <View> to preview question.
9. Click <Done>.
10. Click <Edit> to edit a question. Note: any edits made to a question will instantly change that question in all evaluations it is attached to, which may have already been distributed and used. IMPORTANT: Best practice is to make changes to any question from the Question Bank.
11. Click <Delete> to remove a question from a section.
12. Select *Repeat Section By Instructor* to repeat all questions in section for participant completing evaluation. This functionality is useful for instructor-led (ILT) sessions with multiple instructors. Participants can evaluate each instructor individually. Note:

questions in this section must be created using the tag "INSTRUCTOR.NAME" in place of the instructor's name. The system will replace this tag with actual instructor's names and duplicate the questions for each instructor. If there is only one instructor in the session, this option must be selected to replace it with the actual value in the Level 1 Evaluation Report.

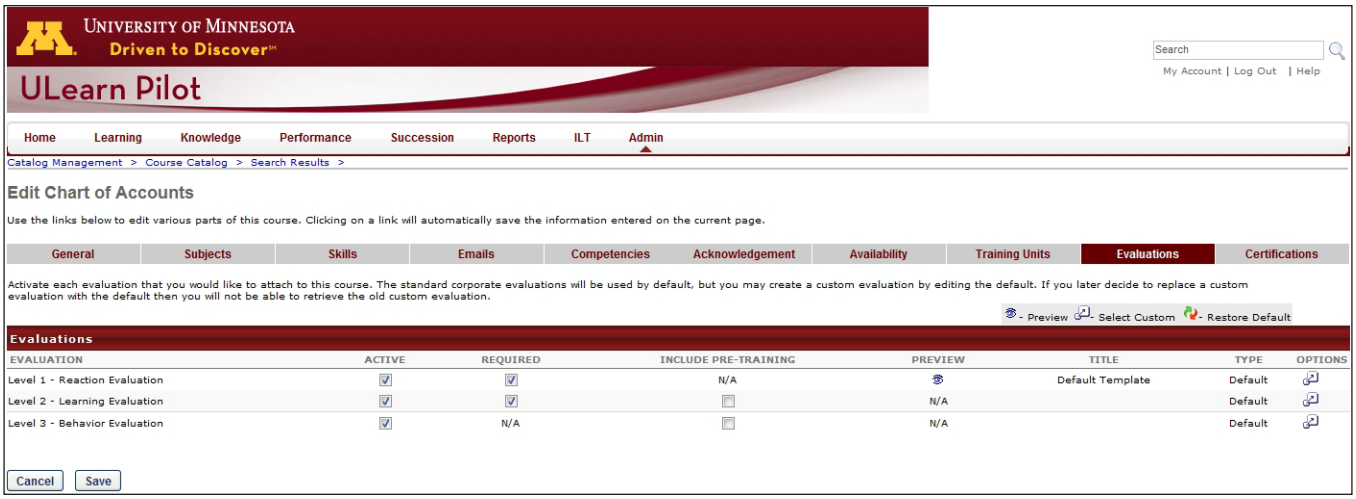
13. Select *Response Required* to require a response for a question. If checked, participant cannot submit evaluation until question is answered.
14. Click <Preview> to view a question.
15. Click <Edit> to edit an existing question:
    - If a question has already been answered by a participant, you cannot change the response type or format of the question; you may only edit the spelling or phrasing. The **Response Type** menu will be inactive and the links to add response choices or sub-questions will not appear.
16. Click <Remove> to remove a question.
17. Enter a number in *Order* to order sections and questions within each section.
18. Click <Submit>.

ATTACHING AN EVALUATION TO A LEARNING OBJECT

To connect an evaluation to a learning object navigate to: **Admin > Catalog > Course Catalog**



1. Select from the following search criteria to locate the learning object you would like to attach the evaluation to:
    - Training Type
    - Provider
    - Title
    - Description
    - Language
    - Skill
    - Subject
    - Date Added to Catalog
    - Availability Criteria
    - Display
2. Locate the learning object and click the Edit icon.



3. Select the **Evaluations** tab.
4. Click the icon under the *Options* column to select a specific evaluation for each level that is appropriate to the learning object selected.
5. Select *Active* to activate the evaluations.
6. Select *Required* as appropriate. A participant's transcript will not indicate complete until all evaluations are taken if *Required* is checked.

Select *Include Pre-Training*. Checking this box indicates a pre-test should be taken before attending training. This can only be used for Level 2 or Level 3 evaluations.

Appendix F: ULearn Reports for Learners

Learners have several report options to review training activities in ULearn in addition to the transcript feature. The ULearn system provides functionality to review progress against training, set "to do's" for your team and assign training. The following are standard reports that will be of most use to a learner. These reports capture activities completed since July 1, 2012 and are on a one day delay.

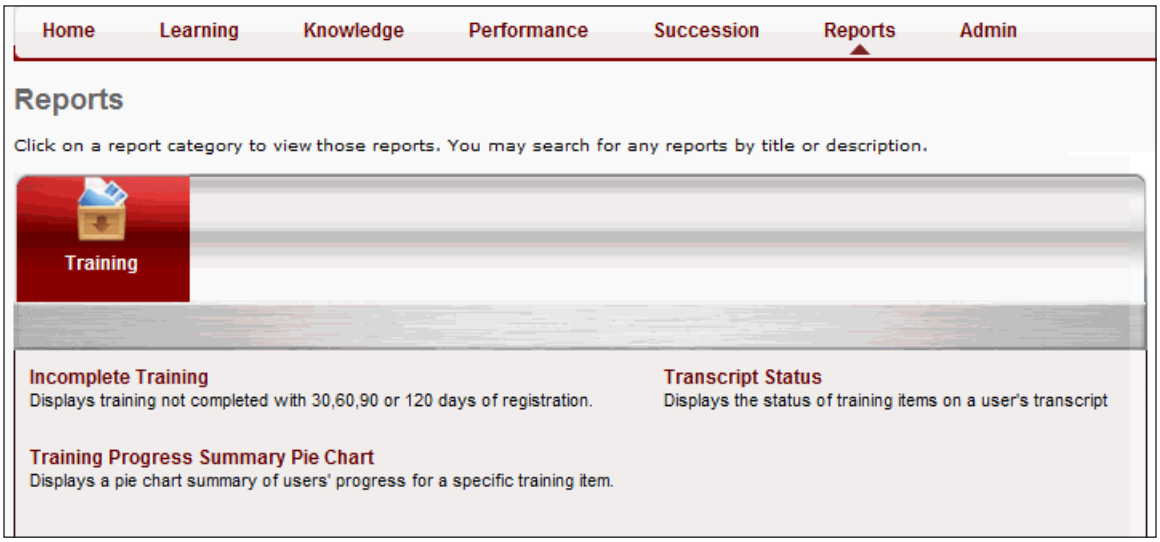
Note: UMReports Training History will provide the complete transcript for a learner and can be found by navigating to: MyU > Key Links > Reporting Center > Human Resources> Training History.

STANDARD REPORTS

The standard reports feature sorts reports into categories by function.

Navigate to **Reports>Standard Reports.**

Learners will find the most useful reports under **Training**. Most of the reports found in ULearn can be exported to Excel.



Transcript Status	A report that shows you the activity on the transcript. This report is set up to be "queued" in ULearn and three reports can be "queued" at a time. This report is run by user for one course at a time.
Training Progress Summary Pie Chart	Similar to the Transcript Status report, this report shows, in graphical form, the training progress of an employee.
Incomplete Training	This report indicates, by employee, by class, whether a training with a specific due date has been completed or not.

Appendix G: ULearn Reports for Administrators

Learning Administrators in ULearn have several options to oversee the training and education activities of employees. Rosters and User transcripts will be viewable as well as several useful standard reports.

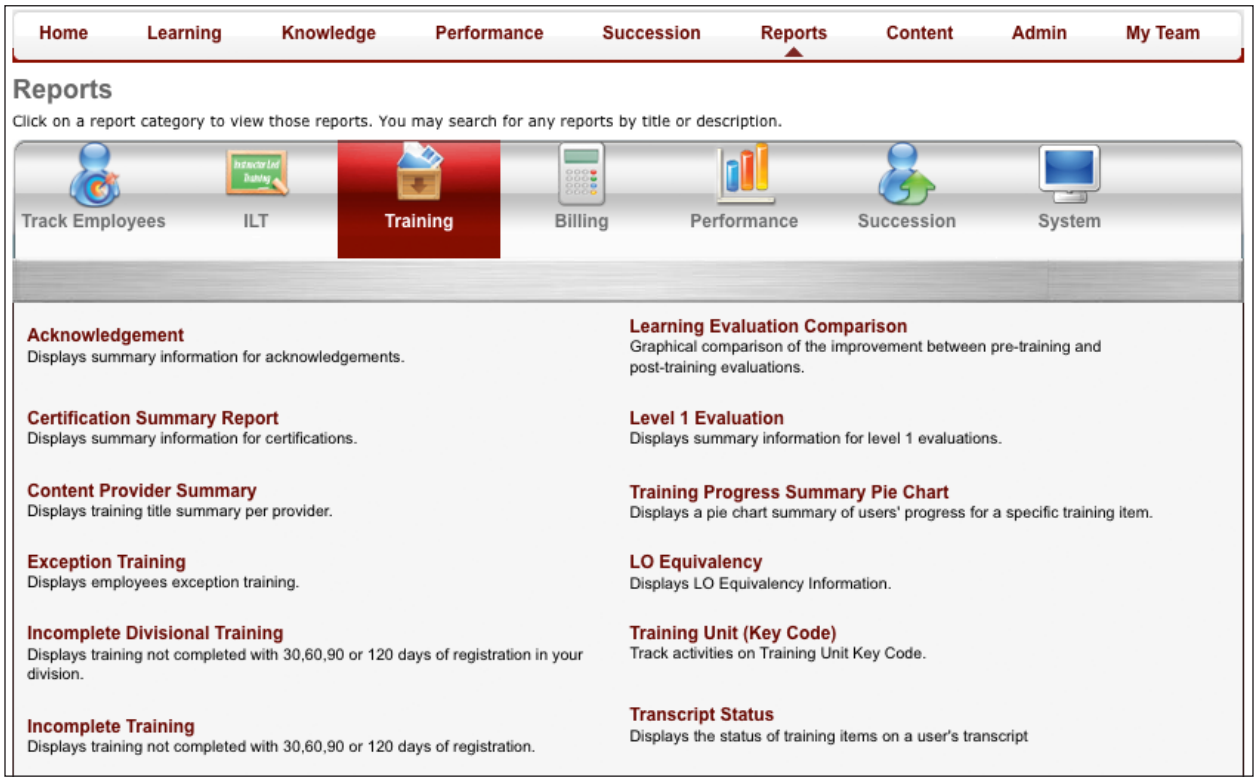
Note: UMReports Training History will provide the complete transcript for a learner and can be found by navigating to: MyU > Key Links > Reporting Center > Human Resources> Training History.

STANDARD REPORTS

The standard reports feature sorts reports into categories by function.

Navigate to **Reports>Standard Reports.**

Learning Administrators will find the most useful reports under **Training**.



Most of the reports found in ULearn can be exported to Excel. Listed below are five reports that can be used to monitor the training your employees are taking.

Transcript Status A report that shows you the activity on an employee's transcript. This report is set up to be "queued" in ULearn and three reports can be "queued" at a time. This report is run by user or by division (unit) for one course at a time.

Appendix G: ULearn Reports for Administrators (cont.)

Training Progress Summary Pie Chart	Similar to the Transcript Status report, this report shows, in graphical form, the training progress of your employees.
Incomplete Training	This report indicates, by employee, by class, whether a training with a specific due date has been completed or not.
Enterprise Training Report	This report captures training activities by transcript status. It can be run by user or any of the Organizational unit designators.
Top Training Items	This report indicates which courses have the top registration activities occurring. It can be run by transcript status (such as enroll or withdraw) and be sorted by a division or other Organizational unit designator.

TERMS

Availability	Who is allowed to search and register for the LO.
Event	The content and subject matter that is to be presented.
ILT	Instructor Led Training.
LO	Learning Object. This includes ILTs, online courses, materials, tests etc. Anything you can register for in ULearn.
OU	Organizational Unit.
Proxy Enrollment	To manage registration on another individual's behalf.
Prerequisites	Instructor Led Training (ILT), Online training or Tests required before the Learning Object (LO) can be attended or completed.
Session	The date, location, time etc.
Session Part	A portion that makes up the date, time, location of an event.
Vendor/Provider	Who owns/is presenting the training.

ICONS

	Add item.
	Copy.
	Edit.
	Expand for more options.
	Open pop-up for selection.
	Preview.
	Users/Roster.
	View Sessions.

Resources

Leadership and Talent Development	612-626-1373 4-UOHR	www.umn.edu/ohr/training
ULearn Support	612-626-0057 ulearn@umn.edu	ulearn.umn.edu