Series A: Administrative Setup

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Overview

The Learn (LE) application gives the HR Administrator the ability to maintain several default system settings. This includes general settings, notification settings, course settings, certificates, and featured courses. The Administrative settings in Learn help administrators ensure key components of the system are properly configured.

Before You Use This Guide

NEOGOV must enable the Learn (LE) environment before you can configure the settings detailed in this guide. Contact your implementation consultant if your environment has not yet been activated.

Who Should Use This Guide

This guide is intended for the Learn HR Administrators who initially set up the system defaults as well as maintain the administrator settings on an ongoing basis.

Contacts for Questions

The following additional resources are available should you have any questions about Learn:

1. NEOGOV Community: Requires NEOGOV product login ID and password for access
2. NEOGOV Customer Support: customersupport@neogov.com
3. NEOGOV Customer Support: (877) 204-4442

General Settings

Who Should Use This Section

This guide is intended for the Learn HR Administrators who initially set up the general settings for the system.

Navigating the General Settings

To navigate to the Administrative Settings, select **Administrative > Settings** from the menu bar located at the top of the page.
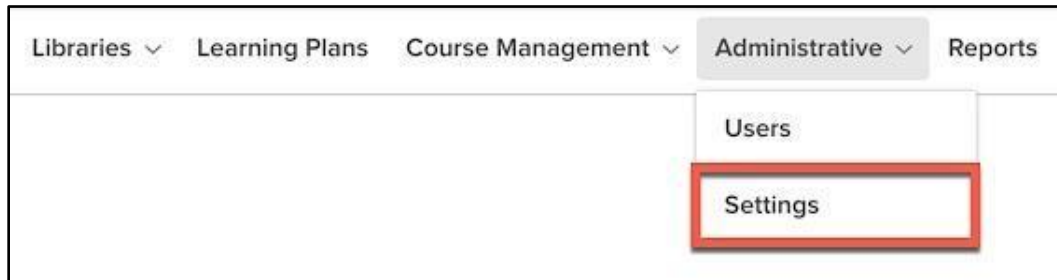
Figure 1: Administrative > Settings

By default, the Settings Menu loads to **General** settings.
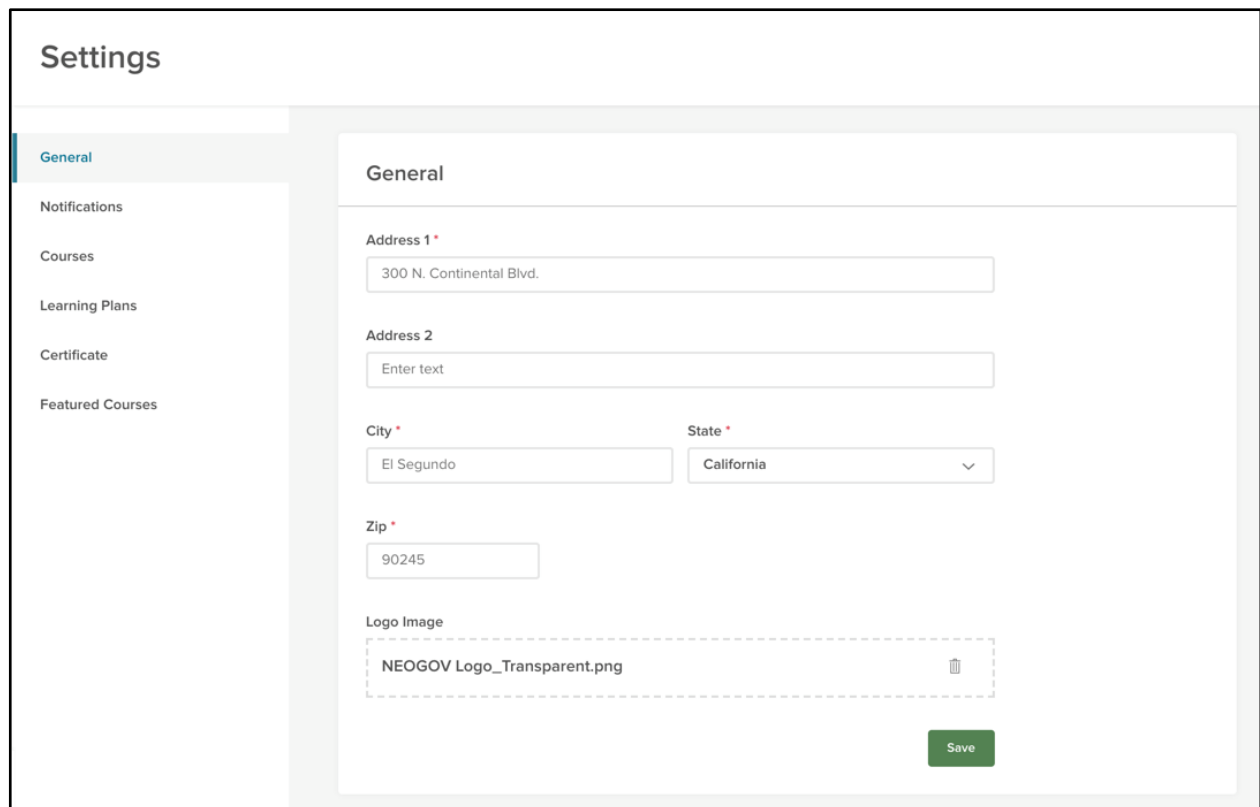
Figure 2: General Settings Dashboard

Notice how all five areas for Administrative settings are accessible through the left sidebar. This makes it easy to know which settings you're currently editing.

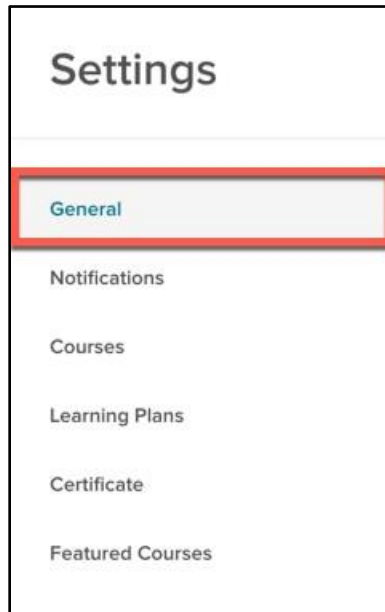For now, let's start with the **General** settings.

Figure 3: Settings > General

The **General** page contains your basic agency address and an (optional) agency logo. All required information is indicated by an Asterix (*).

Figure 4: General Settings

1. **Address**: Input your agency's full address
    a. This address appears on the learner's transcript
2. **City**: Your agency's City
3. **State**: Your agency's State
4. **Zip**: Your agency's Zip Code
5. **Logo Image**: Optional space available to attach your agency's logo
    a. Logo appears on the Learner transcripts and certificates
    b. Recommended to provide a professional touch to the certificates
    c. Supported image types are jpg, svg and png (Max: 5 MB)

When you are done configuring your **General** settings, hit **Save**.

This form should always be saved when initially
configuring or making updates

Notification Settings

Who Should Use This Section

This guide is intended for the Learn HR Administrators who initially set up and maintain the email notifications for the system.

Navigating the Notification Settings

Next, let's move on to **Notifications**. Click the **Notifications** tab on the left sidebar.
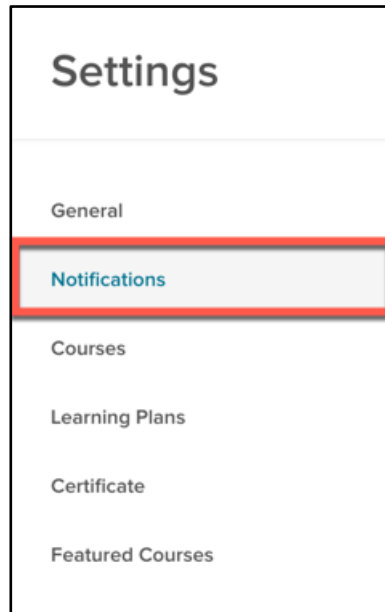
Figure 5: Settings > Notifications

The Notifications page is split into three sections: Course Notifications, Learning Plan Notifications, and Certifications/Licenses Notifications. Each section contains several email notification templates that are configured to automatically send based on various events that take place in your Learn system, such as when a learner enrolls in a course, when course details are updated, and reminders for upcoming scheduled courses.

Administrators have the ability to customize the text in these emails, so it is important to have the emails configured properly and modified (if necessary) prior to using the system. The automatic emails keep your learners on track with their scheduled courses, which engender on time completions and overall higher course completion rates for your organization. These notifications save your administrators time and keep managers and employees informed at each step of the process.

Course Notification Templates

The first section of the **Notifications** section contains customizable emails related to Courses. There are notifications for both classroom and online courses.

Figure 6: Course Notifications

The notice templates included in this section are as follows:

- **Online Course Enrollment:** This email is sent to the specified recipient(s) when a learner is enrolled in an online course
- **Class Enrollment:** This email is sent to the specified recipient(s) when a learner is enrolled in an instructor-led class
- **Class Update:** This email is sent to the specified recipient(s) to inform them the class details have been updated
- **Online Course Reminder and Overdue:** This email is sent to the specified recipient(s) when an online course they have enrolled in is due or overdue. Frequency of this notice can be set by the Administrator in the Course Settings section, or at the individual course level
- **Class Reminder:** This email is sent to the specified recipient(s) as a reminder of an upcoming instructor-led classroom course they have enrolled in. Frequency of this notice can be set by the Administrator in the Administrative Course Settings section, or at the individual course level
- **Class Waitlist:** This email is sent to the specified recipient(s) when a learner is added to the waitlist for an instructor-led class
  - A **Class Enrollment** notice is automatically sent to the specified recipients if a space opens up and the learner is added to the class
- **Online Course Drop:** This email is sent to the specified recipient(s) when an enrolled learner is dropped from an online course
- **Class Drop:** This email is sent to the specified recipient(s) when an enrolled learner is dropped from an instructor-led class
- **Online Course Completion:** This email is sent to the specified recipient(s) when a learner completes an online course

- ○ If a passing score is required, the associated score is included in this notification
- **Class Completion:** This email is sent to the specified recipient(s) when a learner completes an instructor-led class
  - ○ If a passing score is required, the associated score is included in this notification
- **Online Course Enrollment Approval Request:** This email is sent to the specified approver when a learner requests enrollment in an online course which requires approval
- **Class Enrollment Approval Request:** This email is sent to the specified approver when the learner requests enrollment in an instructor-led class which requires approval
- **Online Course Enrollment Pending Request:** This email is sent to the learner, indicating a pending approval, when the learner requests enrollment in an online course which requires approval
- **Class Enrollment Pending Request:** This email is sent to the learner, indicating a pending approval, when the learner requests enrollment in an instructor led class which requires approval
- **Online Course Enrollment Approved Request:** This email is sent to the specified recipient(s) when the learner's enrollment request in an online course has been approved
- **Class Enrollment Approved Request:** This email is sent to the specified recipient(s) when the learner's enrollment request in an instructor led class has been approved
- **Online Course Enrollment Rejected Request:** This email is sent to the specified recipient(s) when the learner's enrollment request in an online course has been rejected
- **Class Enrollment Rejected Request:** This email is sent to the specified recipient(s) when the learner's enrollment request in an instructor led class has been rejected

Learning Plan Notification Templates

The second section of the **Notifications** section contains customizable emails related to Learning Plans.
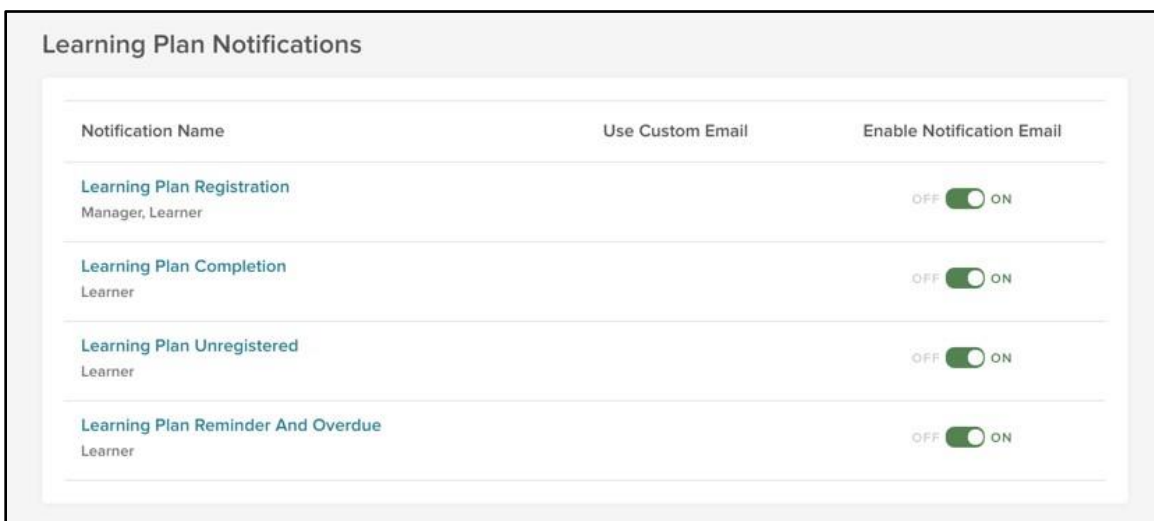

Figure 7: Learning Plan Notifications

The notice templates included in this section are as follows:

- **Learning Plan Registration:** This email is sent to the specified recipient(s) when a learner is enrolled in Learning Plan
- **Learning Plan Completion:** This email is sent to the specified recipient(s) when a learner completes a Learning Plan
- **Learning Plan Unregistered:** This email is sent to the specified recipient(s) when a learner is unenrolled (dropped) from a Learning Plan
- **Learning Plan Reminder and Overdue**: This email is sent to the specified recipient(s) to remind them of the Due Date and Registration Status of a Learning Plan when it becomes overdue

Certification/License Notification Templates

The third section of the **Notifications** section contains customizable emails related to Certifications and Licenses.
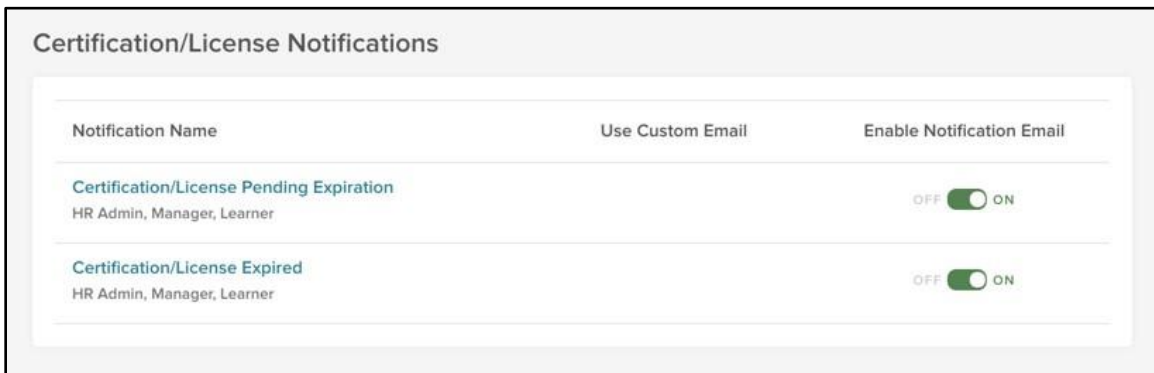

Figure 8: Certification/License Notifications

The notice templates included in this section are as follows:

- **Certification/License Pending Expiration:** This email is sent to the specified recipient(s) when a learner's Certification/License is close to its expiration date
- **Certification/License Expired:** This email is sent to the specified recipient(s) when a learner's Certification/License has expired

Modifying Email Notifications

In addition to simply enabling or disabling an email notification, you can also customize each individual notification to your exact needs. You can see all details about a particular notification in its row.
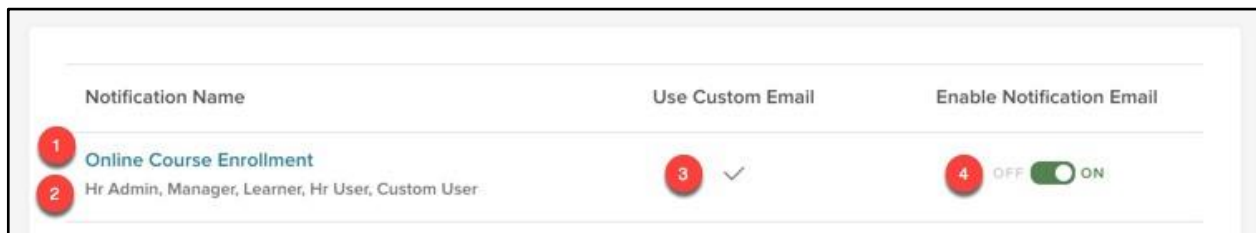

Figure 9: Email Notification Specifics

1. **Notification Name:** This is the name or purpose of the notification
    a. Click on the Notification Name to edit the email notification
2. **Recipients:** These correspond to actual recipients selected on template
3. **Use Custom Email:** When the email notice is customized, a ✓ appears in this column
4. **Enable Notification Email:** View whether a notification is enabled/disabled
    a. This setting can only be changed *and saved* by opening up the notice and clicking **Save** in the flyout

Let's take a closer look at one of the email notifications. Click on the **Class Enrollment** notification.

Figure 10: Notification Edit Page

1. **Use custom email content:** Enables customization of the notification email
    a. Check this box to activate the custom content areas (2, 3, & 4)
    b. To send the email as is, leave the **Use custom email content box** unchecked
        i. If unchecked, you CANNOT make changes to areas 2, 3, & 4
2. **Tokens:** Provided merge fields to place in the subject line and body of the notification when customizing the content
    a. To add a token, place your cursor in the area where you want to add the token, then click on the token
    b. Remember to add appropriate spacing before and/or after the token so the notice is properly formatted when the recipient receives it
3. **Subject:** The subject of the email
    a. Visible to the recipient when they receive the notification

      b.   Modifying this section is helpful to ensure learners pay attention to and open the emails

         c. Not Rich Text Enabled

4. **Toolbar:** Rich Text Enabled settings to use when modifying the text in the body of the notification email

    a.   You can customize text by making it bold, italicized, aligned, numbered, and bulleted

    b.   Your notification can also contain links, an attachment, and a video

5. **Body:** The main text of the email visible to the recipient when they receive the notification

6. **Recipients:** Select the appropriate recipients of the email (always active)

    a.   Recipients vary depending on the type of email notification

        i.   Example: An online course does not have an instructor, so the recipient box for Instructor would not be selected on the **Online Course Enrollment** email. A class course, however, does have a live instructor, so the Instructor recipient box can be checked when configuring the **Class Enrollment** email

7. **Enabled:** The on/off switch for the email notice

    a.   Notifications are only sent if this is set to **ON**

8. **Save:** Confirms any customizations you have made to the email notification

From highlighting important messages with email subject lines to changing notification recipients, you can use these customizations to ensure you're getting essential information to the right people.

TIP!

Add Managers as recipients to Reminder/Overdue Notifications to provide more transparency to Managers on their team's training activity and progress

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Custom Email Notifications

Custom email notifications allows administrators to send ad-hoc notifications to their employees from the Learn system. Custom notifications are a great way to send upcoming training schedules, make announcements relating to courses, or share information on courses or enrollments to specific security roles like managers.

From notifications, select Custom Notifications. The Custom Notification table displays information for all pending and past notices.
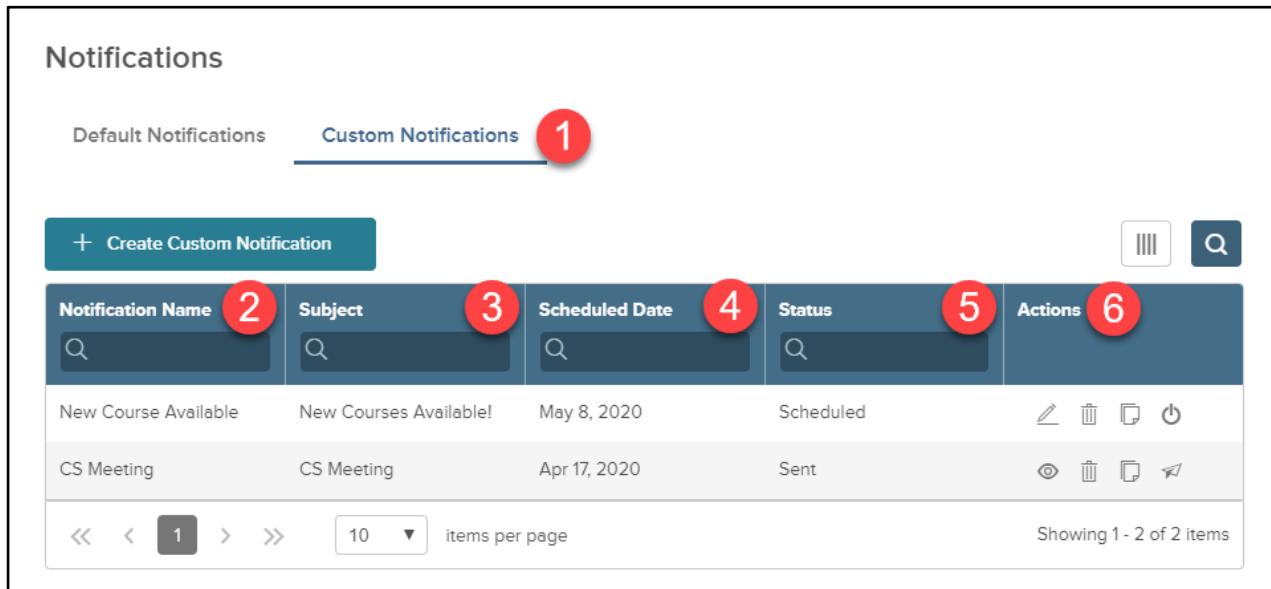
Figure 11: Custom Notifications Table

1. **Custom Notifications Tab:** To access the tab, navigate to the administrative settings, then select notifications.
2. **Notification Name:** Name of the custom notification.
3. **Subject:** Subject line of the notification.
4. **Scheduled Date:** Date selected for the notification to send.
5. **Status:** Status of the notification: Draft, Scheduled, Sent.
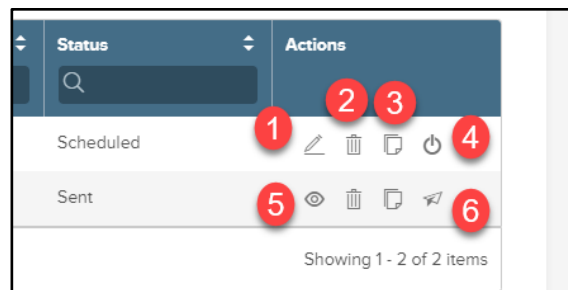6. **Actions:** Edit, preview, delete, cancel scheduled send, copy, and resend notification.

Figure 11b: Custom Notifications Table Cont.

1. **Edit:** Edit the notification details before the notice is scheduled to send.
2. **Delete:** Delete the notification and notification details.
3. **Copy:** Copy the notification. Once copied, you can edit the details where needed.
4. **Cancel Send:** Cancel the scheduled send of a notification.
5. **Preview:** Preview the notification.
6. **Resend Notification:** Select the recipients and resend the notification.

Select the Create Custom Notification button to create your notification. From there, add in the Notification Name and the Notification Trigger. Then, select Continue to begin customizing your notice.

Figure 12: Create Custom Notification Flyout

Add the notification details in order to specify who the notification should be sent to, the content of the notification, and schedule the date the notice should be sent.

Figure 13: Notification Details

1. **Notification Name:** Name of the notification.
2. **Recipients by Department:** Select the departments that will receive the notification.
3. **Additional Recipients by email:** Add additional recipients by their email. Please note: A department must be selected before additional recipients can be added.
4. **Recipients by role:** Select recipients by user role: HR Admin, HR User, Manager, or Learner.
5. **Total user count:** Total number of recipients based on the selections.
6. **Notification content:** Content of the email notification.
7. **Send date:** Specify the date the notification should send. Please note: the notification will be sent between 2 AM to 6 PM (PST) on the selected date. This cannot be edited.
8. **Cancel or schedule send/save as draft:** Cancel the notification, schedule to send, or save as a draft.

Preview the notification to confirm the information entered is accurate and displaying correctly.

Figure 13b: Notification Details Cont.

Once the information is confirmed, select Schedule to Send to schedule the notice. If edits are still required, select Save as Draft.

Figure 14: Schedule to Send/Save as Draft

Courses Settings

Who Should Use This Section

This guide is intended for the Learn HR Administrators who initially set up and maintain the course settings for the system.

Navigating the Courses Settings

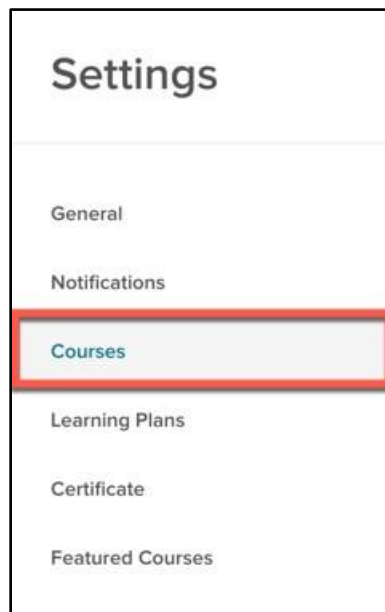Next, let's move on to **Courses**. Click the **Courses** tab on the left sidebar.

Figure 15: Settings > Courses

The Courses section contains the default settings for your courses, which auto-populate on the individual course setup page to save time for users when creating courses.

Some of these settings may not be applicable to a specific type of course. If that is the case, those settings are not visible on the actual course level. For example, settings for Online Courses do not apply to Classroom Courses.

Figure 16: Courses Settings Page

Any changes to the default configurations are only reflected on newly added courses. Previously customized settings on individual courses are not impacted.

All settings configured here can still be edited at the individual course level

All Courses

These settings pertain to all courses.

Figure 17: Courses > All Courses

1. **Self-Enrollment:** Controls if learners can enroll themselves in the course
    a. Allowing self-enrollment streamlines the process, greatly reducing HR's responsibility of managing enrollment
    b. Gain employee trust by letting them choose areas they want to train and develop in
2. **Enrollment Approval Required:** This field adds a layer of approval to the enrollment process. If turned on, select the appropriate user role or specific employee responsible for approving enrollment
    a. Using Enrollment Approvals saves time by ensuring learners only enroll in courses they belong in. It also gives more visibility to managers on what training their employees take
    b. Refer to the **Notifications** section for notices pertaining to **Approvals.** These should be enabled **prior to requiring** enrollment approval on course(s)
3. **Enrollment Approval:** Select an enrollment approver from this dropdown menu
    a. Selections are Manager, Instructor, Administrator, or a specific user named on the list

b. This field is required when Enrollment Approval is required

4. **Pass Required:** Determine if Learners must pass the course
    a. Please note this field only applies to courses with scored assessments

5. **Passing Score:** If **Pass Required** is enabled, a passing score percentage must be entered
    a. The system auto-scores quizzes, resulting in time savings over manually-scored quizzes

6. **Display Dropped Courses**: Controls if a *Cancelled* status displays for a dropped course (Enabled by default)
    a. This feature is most helpful to clean up instances where a learner was erroneously enrolled in a course in which they had to be dropped

Reminder Settings

7. **Reminder Notices:** If enabled, reminder notices are sent to enrolled learners at the frequency selected
    a. Reminder notices can be sent for classroom courses and online courses *if* they have a relative due date
    b. Using reminder notices can help boost completion metrics and lower no-show rates

8. **Overdue Notices:** If enabled, overdue notices are sent to enrolled learners at the frequency selected
    a. Overdue notices are *only* applicable for online courses, and are sent based on the Relative Due Date

Custom Online Courses

These settings pertain only to custom online courses.

Figure 18: Courses > Custom Online Courses

1. **Gated:** Requires courses to be completed in order by page (On by default)
    a. Learners are only able to complete a gated course by viewing each page sequentially

      b.   This can help ensure your learners are going through the entire course rather than skipping through it

2. **Allow Retakes**: Gives learners the ability to retake the course if they do not pass the assessment associated with the course
      a.   This saves HR time by not having to re-enroll Learners in the course themselves
      b.   If **Allows Retakes** is enabled, **Pass Required** also becomes enabled
      c.   This setting should only be enabled if course retakes are allowed

3. **Attempts:** If allowing retakes, determine the number of attempts the Learner can make in order to **pass** courses that have assessments

4. **Relative Due Date:** When the course is due, relative to the enrollment date
      a.   Enter a number followed by a selection of days/weeks/months
      b.   After this date passes, the course is marked as **overdue**

In order to save any customizations made to the course default settings, click **Save** in the top right corner of the page.

Figure 19: Save Courses Settings

Learning Plans

Who Should Use This Section

This guide is intended for the Learn HR Administrators who initially set up and maintain the course settings for the system.

Navigating Learning Plans Settings

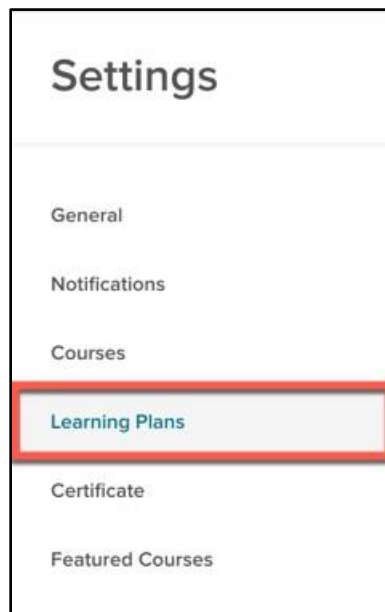Next, let's move on to **Learning Plans**. Click the **Learning Plans** tab on the left sidebar.

Figure 20: Settings > Learning Plans

The Learning Plans section contains the default settings for your Learning Plans, which auto-populate on the individual plan setup page to save time for HR Admins when creating Learning Plans.

The following reminder settings available for the Learning Plans are similar to other reminder settings within the system. Any changes to the default configurations are only reflected on newly added Learning Plans. Previously customized settings are not impacted.

TIP!

All settings configured here can still be edited at the
individual Learning Plan level

Figure 21: Learning Plans Notifications Page

1. **Display Unregistered Learning Plans**: Controls if a *Cancelled* status displays for a dropped Learning Plan (Enabled by default)
   a. This feature is most helpful to clean up instances where a learner was erroneously enrolled in a Learning Plan in which they had to be dropped
2. **Reminder Notices:** If enabled, reminder notices are sent to enrolled learners at the frequency selected
   a. Using reminder notices can help boost completion metrics and lower no-show rates
3. **Overdue Notices:** If enabled, overdue notices are sent to enrolled learners at the frequency selected

Certificate Settings

Who Should Use This Section

This guide is intended for the Learn HR Administrators who initially set up and maintain the certificate settings for the system.

Navigating Certificates Settings

Next, let's move on to **Certificates**. Click the **Certificate** tab on the left sidebar.
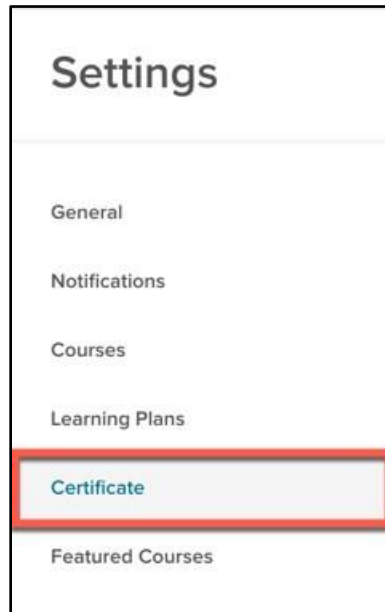
Figure 22: Settings > Certificate

Administrators can configure the certificate of completion that learners receive for completed courses. With Certificates, learners feel recognized and accomplished, which keeps them motivated to continue doing a great job and improve at work. They give learners positive and personalized recognition for the hard work and time they put into taking and completing training.

The displayed page shows a customizable certificate template.
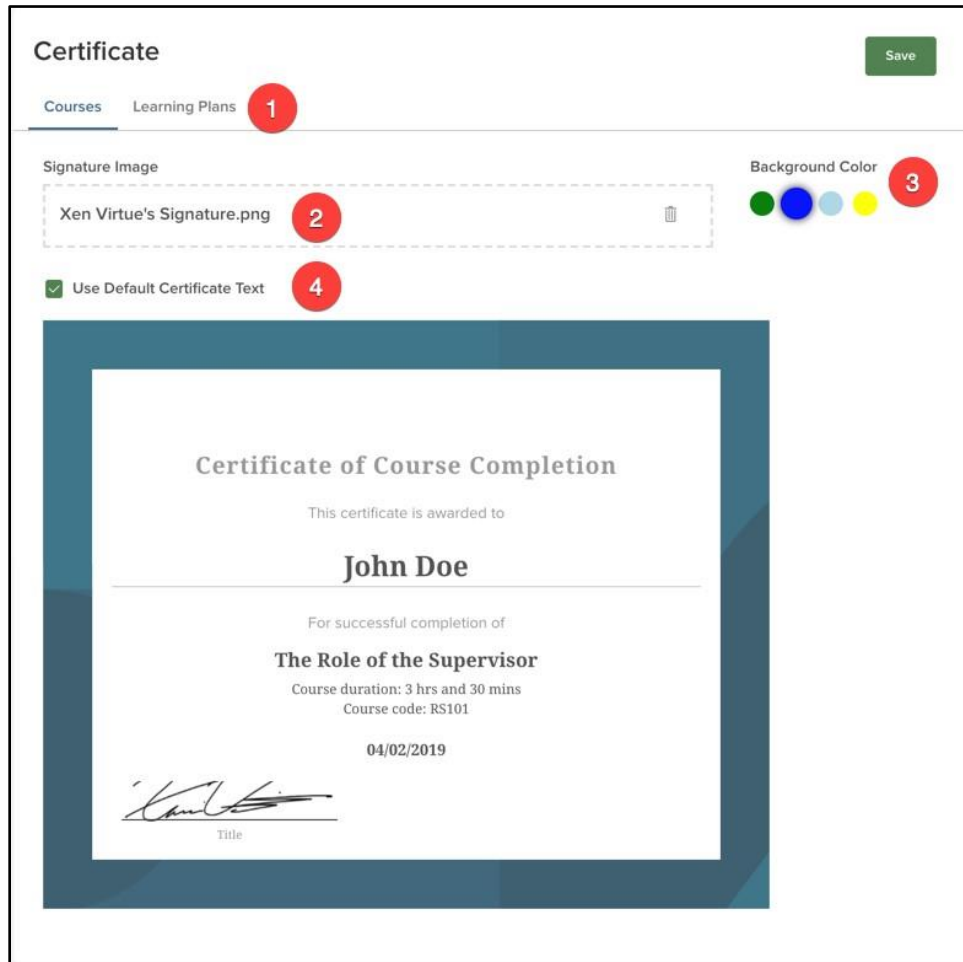
Figure 23: Certificate Settings Page

1. **Header Tabs**: Switch between Certificate options for Courses and Learning Plans
2. **Signature Image:** A signature can be uploaded or dragged and dropped here
   a. The signature displays in the lower left corner of the certificate in the Title area
   b. The agency should determine which signature to use such as the HR Manager, Mayor, etc.
   c. If you have uploaded an agency logo on the General settings page, it displays in the lower right corner of the certificate
3. **Background Color:** Choose from the available options for the Certificate border
4. **Use Default:** When this box is checked, no text modifications can be made to the certificate
   a. When this box is unchecked, text modifications can be made to all text fields excluding learner name, course name, course code, and completion date

TIP!

To edit the verbiage of the Certificate, you must click into the text itself

Featured Courses

Who Should Use This Section

This guide is intended for the Learn HR Administrators who initially set up and maintain the featured courses for the system.

Navigating the Featured Courses Settings

The final section under is **Featured Courses**. Click the **Featured Courses** tab on the left sidebar.
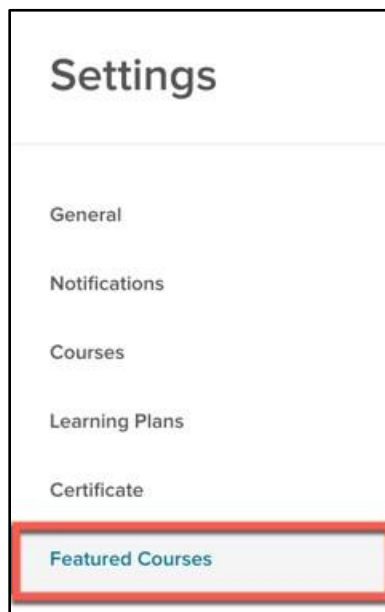
Figure 24: Settings > Featured Courses

Here Administrators can feature up to three courses in the **Featured Courses** section, which displays on the learner's dashboard. This section allows you to promote new or upcoming courses you want employees to take and can include both classroom and online courses.

Figure 25: Featured Courses Page

1. **Add Featured Courses:** Select up to three (classroom or online) courses to feature for learners on their dashboard
2. **Remove:** Remove one or more courses the Featured List

Users

Who Should Use This Section

This guide is intended for the Learn HR Administrators who initially set up and maintain the user profiles for the system.

Navigating the Users Settings

In addition to these general Administrative Settings, there are also User Settings where HR can update the security profile for users and designate one or more employees as instructors.

To navigate to the Users Settings, select **Administrative > Users** from the menu bar located at the top of the page.
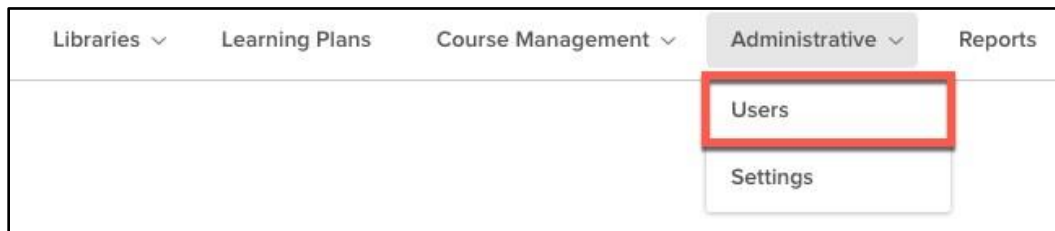
Figure 26: Administrative > Users

The resulting page displays a table chart of all employees within the system.

Figure 27: Users Settings Page

1. **Username**: Users' username for the system
2. **Employee #**: Users' associated employee number
3. **First Name**: Users' first name
4. **Last Name**: Users' last name
5. **Department:** Users' assigned department.
6. **Account Status**: Users' current online access state. To send an activation email, select "Send Activation Email".
7. **Security Profile**: Users' current security permission
8. **Is Instructor**: Displays 'Yes' if user is marked as an instructor.
9. **Actions**: Use to edit the user's profile, deactivate a user, or send a password reset notification.
10. **Filter**: Use to sort the total list of users
    a. Current filter options include: username, employee #, first name, last name, department, account status, security profile, and is instructor.

Additionally, each column within the chart can be searched, making it easy to find an employee.

The main role of this page occurs within the **Actions** column. From here, click the pencil icon for a user to edit their Profile. Doing so causes the following flyout.

Figure 28: Actions Flyout

1. **Name**: User's first and last name 2.
Employee #: Users' employee number.
3. **Username:** Users' username.
4. **Account Status:** Displays whether the user is activated or deactivated.
5. **Profile Type**: User's Security Profile
    a. Options include: Employee/Manager, HR User, and HR Admin
6. **Is Instructor**: Check whether or not this user is an instructor
7. **Save/Cancel**: Save or Cancel your changes by selecting these

Creating a New Learner

Who Should Use This Section

Human Resources Administrators (HR Admins) should use this section to learn how to create and edit employee records in Learn.

Navigating to the Learner List

Any employees required to complete or assign courses in Learn must have an employee record set up in the system. To access the Learner List, click on Learners in the top menu bar.
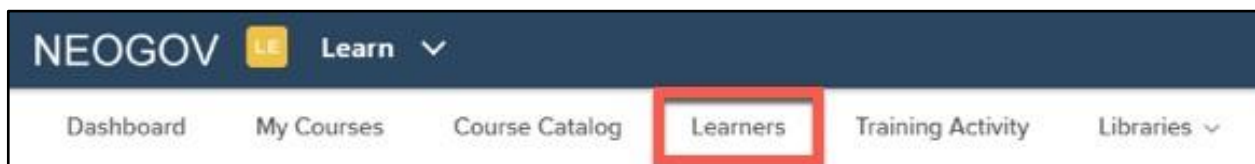
Figure 29: Learners Menu

Learners

To add a new learner manually, click the **+ Add a Learner** button located at the top right of the page.

Figure 30: Learners List > + Add a Learner Button

Add the Learner info, i.e. **First & Last Name, Employee #, Email address,** etc. All fields flagged in red are required.

Figure 31: Add Employee Information

Select a Learner's **Position** and click the **Choose Position** button.

Figure 32: Position Button

If the Position does not yet exist in your system, you can create one by clicking **Add New**.

Figure 33: Add New Position Button

Search and add a **Manager**.

Figure 34: Choose Manager Button

The new employee is immediately added into Learn but they cannot yet log in. In order to activate their User account, the HR Admin must first send an Activation email.

Creating Departments, Divisions, and Positions.

Who Should Use This Section

Human Resources Administrators (HR Admins) should use this section to learn how to create and edit Departments, Divisions, and Positions in Learn.

Creating Departments

Departments within the Learn system represent the major entities of your organization. To add a new Department, select **Administrative**, then select **Departments.**
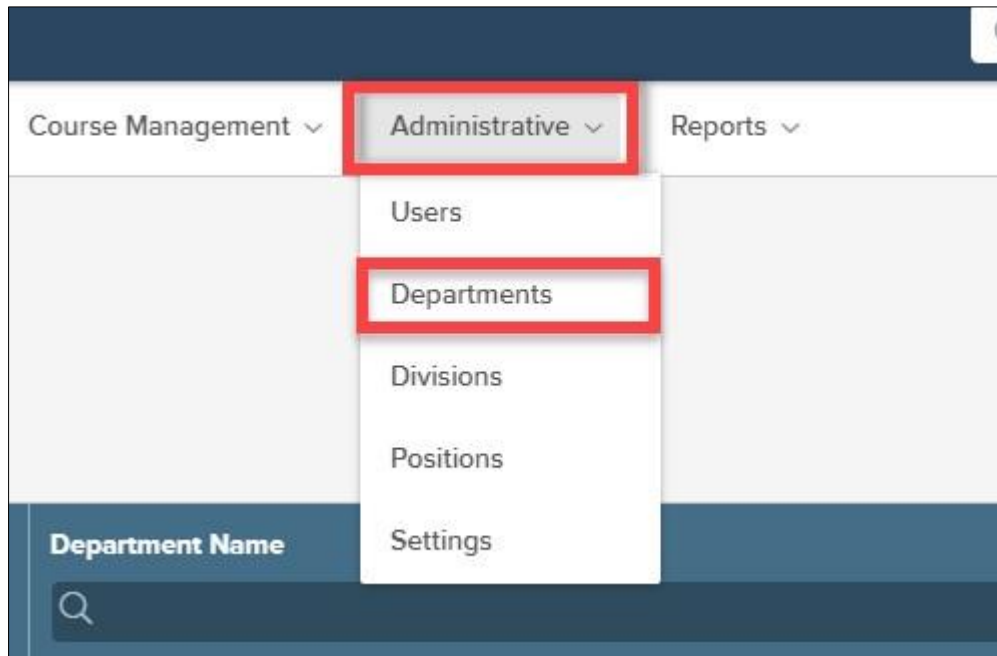

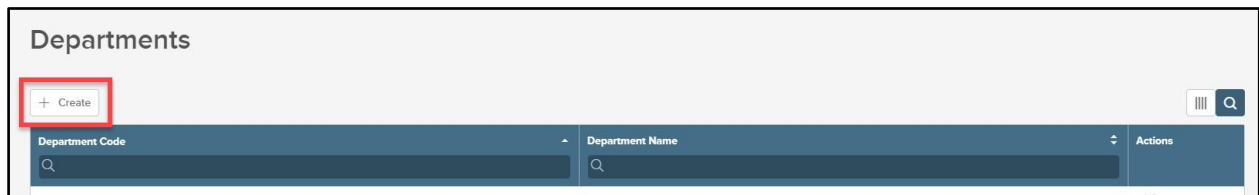*Figure 35: Administrative Departments*

Select **+Create.**

Figure 36: Create Departments

Populate the required fields for the Department. Once populated, select Save.

Figure 37: Required Department Fields

1. **Department Code**: Enter a code or abbreviation for the department. Use your organization's numbering or coding system for department. If your organization does not have a system, then use abbreviations or acronyms.
2. **Department Name**: Enter the full name of the department.

Creating Divisions

Divisions within the Learn system represent the minor entities of your organization; those subordinate to departments. Please note divisions are not required. If your organization has more of a horizontal architecture where there is simply one listing of departments, then you can skip creating divisions. To create a Division, select **Administrative**, then select **Divisions.**
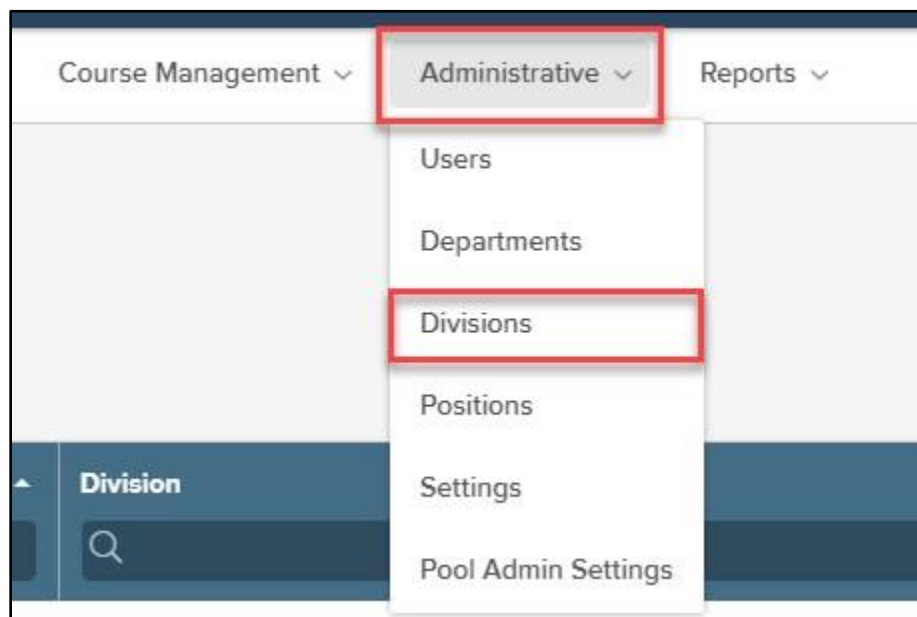

Figure 38: Administrative Divisions

Select **+Create**.

Figure 39: Create Divisions

Select the Department that the Division will fall under. Begin typing in the Department name or select the search icon to select from a list.

Figure 40: Required Division Fields

1. **Division Code:** Enter a code or abbreviation for the division. Use your organization's numbering or coding system for divisions. If your organization does not have such a system, then use abbreviations or acronyms.
2. **Division Name:** Enter the full name of the division.

Creating Positions

A significant component to the LE system is the Position. Positions are essentially the jobs employees work in. For employees to be added into LE, they must be added into a Position. As we've already seen, Positions also serve useful functionality in LE, i.e. to associate Courses to.

Positions are required in Learn. They are not optional. At the very least, Departments must be associated to Positions. Divisions and Class Specs are optional. NOTE: Insight customers use Class Specs to hire employees into. These same Class Specs automatically appear in LE. However, since Positions (not Class Specs) are required fields in LE, Class Specs would have to be assigned to Positions. Insight customers must associate Class Specs and Divisions from IN to Positions in LE, particularly when using the new hire feed.

For all other customers Positions, Departments, and Divisions can be added directly in LE.

TIP!

Insight customers should always maintain data on **Class Specs, Departments,** and **Divisions** in Insight. Changes made directly in LE impact the tables in Insight

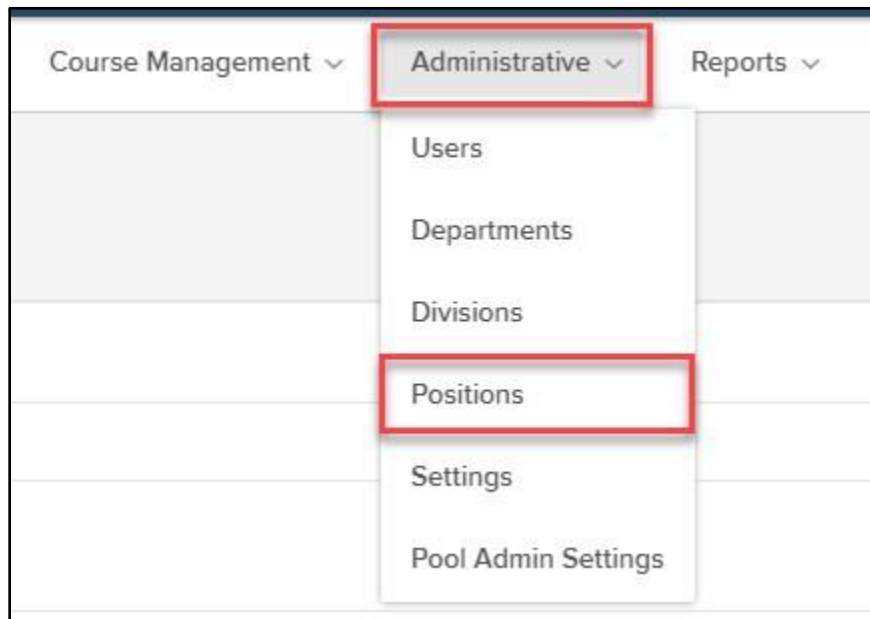To add a Positions, select **Administrative**, then **Positions.**

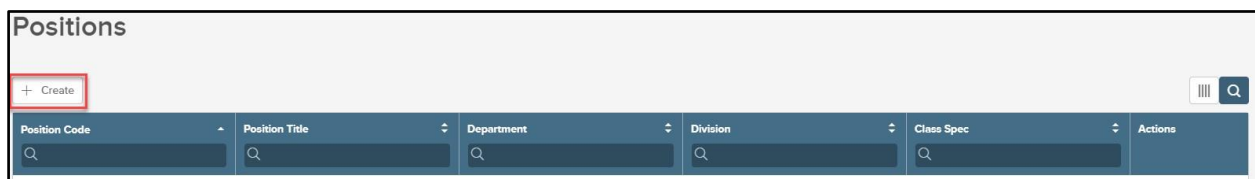
Figure 41: Administrative Positions

Select **+Create**.

Figure 42: Create Positions

Once you've clicked the + button, the following screen appears.

Figure 43: Position Fields

1. **Position Title**: Name of the position (Required)

2. **Position Control Number**: Alphanumeric code for the position (Required)

3. **Description**: Description of the position (Optional)

4. **Department**: Department associated to the position (Required)

5. **Division**: Division associated to the department and position (Optional)

   a.   Provide if used in Insight

6. **Class Spec**: Class specification/code associated to the position (Optional)

   a.   Class code is required in Insight but optional in Perform

7. **Max FTE**: Max allotted headcount for this position (Optional)

8. **Current FTE**: Current allotted headcount for this position (Optional)

To make a change to a Position, i.e. to revise the Code or Title, click the edit (pencil) icon. To permanently remove a Position from the system, click the delete (trash can) icon. Once deleted, it cannot be retrieved!