Series C: Enrolling in Courses

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Overview

The Learn (LE) application allows users to enroll in online and classroom courses in five different ways: via the Course Catalog, the Calendar, the Dashboard, the Learner List, and the Admin Catalog. Your user role dictates how many of these methods you have access to, although all users can enroll in classes via the Course Catalog and the Calendar.

This guide covers where to find all five enrollment methods within the LE system, what they look like, and how to use them.

Before You Use This Guide

NEOGOV must enable the Learn (LE) environment before you can enroll yourself or other users into courses as 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 all Learn users who are enrolling in courses; however some methods of enrollment are reserved for users with higher permissions (e.g. Managers, Administrators). Within each section is a "Who Should Use This Guide" passage detailing who has access to that method of enrollment.

Quick Reference

To quickly jump to a specific method by which a user can enroll in a course, select the appropriate link:

- Enrolling via Course Catalog
- Enrolling via Calendar
- Dashboard
- Learner List
- Admin Catalog

Contacts for Questions

The following additional resources are available should you have 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

Course Catalog

Who Should Use This Section

All users (Employees, Managers, HR Admins) should use this section to learn how to enroll in courses via the Course Catalog. This method of enrollment is particularly versatile, since all users have access and all types of courses are viewable here. Note that only published courses appear here and are available to the signed-in user.

Navigating the Course Catalog

The Course Catalog is where you can view all the published classroom and online courses you have access to. You are also able to easily tell if a course is required or not, which helps you stay compliant.

To navigate to the Course Catalog, select **Course Catalog** from the menu bar located at the top of the page.

Figure 1: Menu Bar > Course Catalog

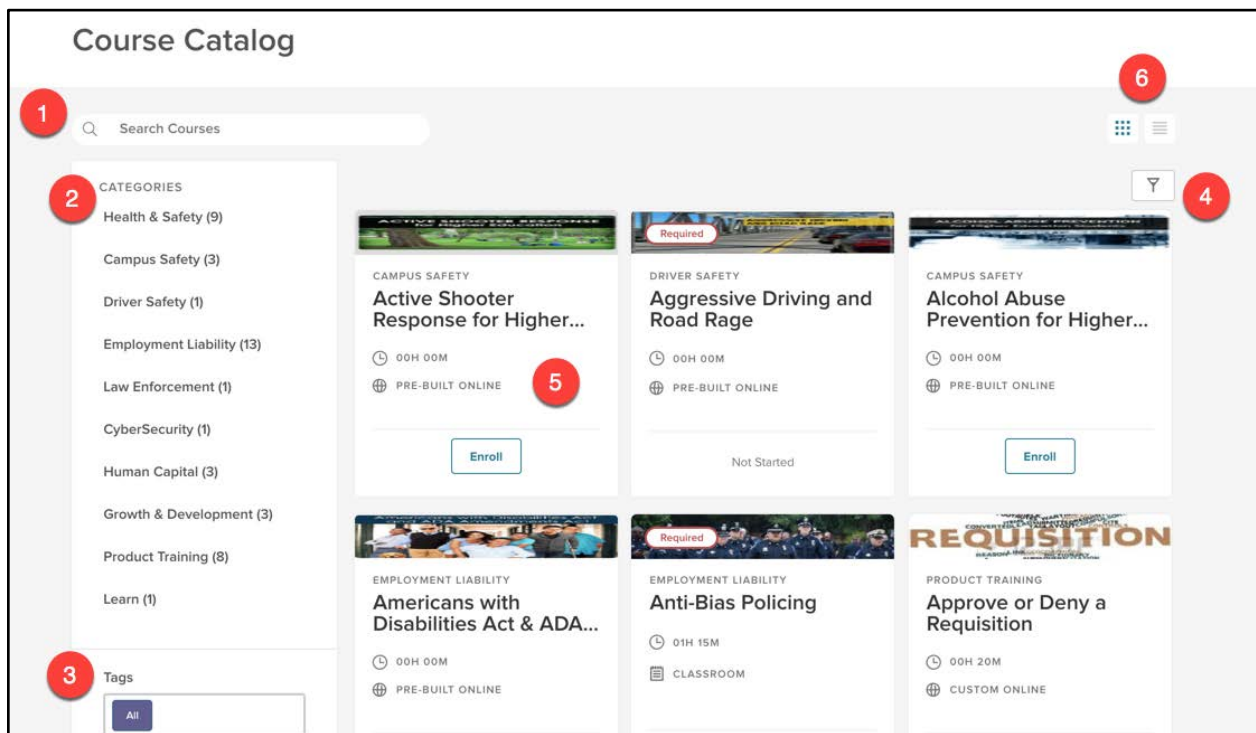The **Course Catalog** makes it easy to search for and enroll in courses.

Figure 2: Course Catalog

1. **Search Bar**: Type into this bar to look for a specific course title
2. **Categories Sidebar**: Narrow courses down by their associated category

  a. Having similar courses grouped by topic aids learners in finding relevant coursework

 3. **Tags**: Narrow courses down by associated tags or keywords

  a. If learners are looking to improve on a specific competency, such as communication, then this is the best way to find those types of courses

 4. **Filters**: Limit the course view in the **Course Catalog** with specific requirements

  a. Filters available include: course name, course code, category, delivery method, type of course (required or not), number of classes (classroom only), duration, last updated by, last updated on, passing score, and approval required

  b. Multiple filters can be active at once

 5. **Course Card**: Bite-sized information about a particular course

  a. See Course Cards for more information

 6. **Catalog View**: Toggle the **Course Catalog** view by either the default card view or list view

All of these available filters give you the ability to find any specific course needed in the easiest and fastest way possible.

Course Cards

The **Course Card** is a graphic display of the important details of a particular course. Like a playing card,

the **Course Card** can be flipped between its front and back by pressing the ⓘ icon in the upper right corner of the card. This allows you to see at a glance what the course is and what it's about before you decide to enroll.
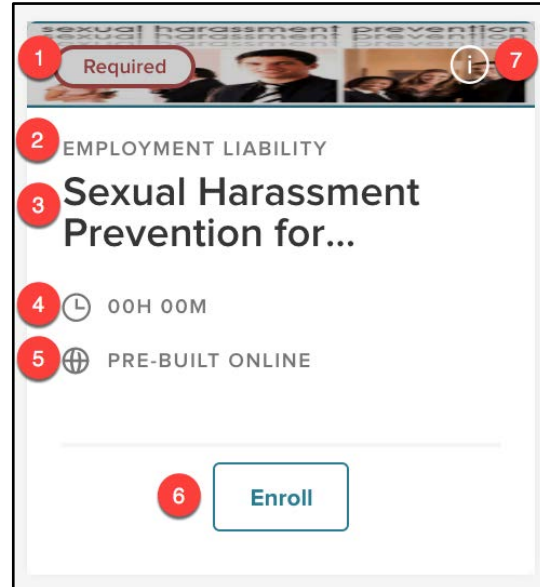

Figure 3: Course Card - Front

 1. **Header**: A visual representation of the course

  a. Includes a red **Required** label if the course is required, helping you stay compliant

 2. **Course Category**: Specifies what category the course belongs to

 3. **Course Name**: The title of the course

 4. **Duration**: How long the course takes to complete

5. **Type of Course**: Whether the course is a Pre-Built Online, Custom Online, or a Classroom Course
6. **Enroll Button**: Select this to enroll yourself in the course or request approval
    a. If you are already enrolled in a course, this button instead says what your current status in the courses is (e.g. *Not Started, In Progress*)
    b. For Classroom Courses, this button instead says **View Classes**
        i. From here, you can view different class session for the course
7. **(i) Icon**: Flip to the backside of the card for more information
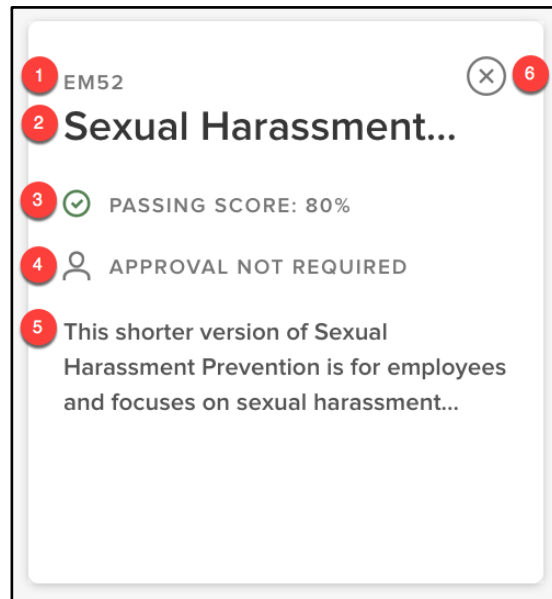
Figure 4: Course Card - Back

1. **Course Code**: The code associated with the course
2. **Course Name**: The title of the course
3. **Passing Score (If Available)**: The minimum score required to pass/complete the course
4. **Approval Required**: If enrollment in the course needs to be approved by another user (i.e. manager, instructor, specific employee, etc.)
5. **Description**: Brief explanation of the course
6. **(x) Icon**: Flip back to the frontside of the card

After viewing the **Course Card**, you can find even more details about the course by clicking on the course title. This brings up the **Course Details Page**.

Course Details Page

The **Course Details Page** is accessed by clicking on the name of a course on its **Course Card**. This opens to a full page with all the details of the course.

Figure 5: Course Details Page

Each **Course Details Page** is broken up into smaller sections that make it easy to digest information. The first section is the header.

Figure 6: Course Details Page - Header

1. **Course Category**: Specifies what category the course belongs to
2. **Course Name**: The title of the course
3. **Description**: Brief explanation of the course
4. **Enroll**: Select this to register yourself in this course or request approval

The next section is the **Course Details** on the rightmost side of the screen. This tells you the quick specifics of the class.
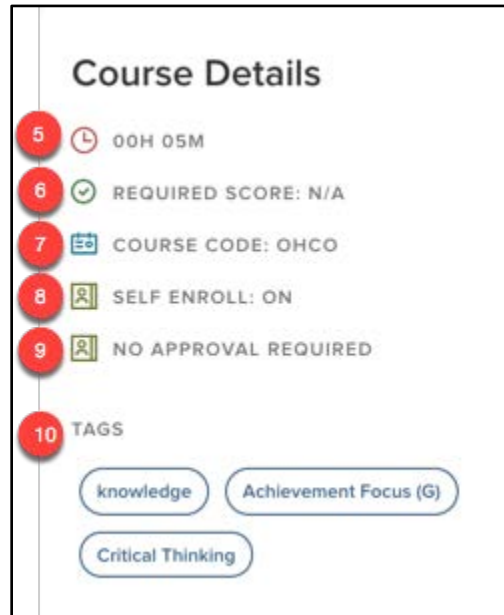
Figure 7: Course Details Page - Course Details

5. **Duration**: How long the course takes to complete
6. **Required Score**: The minimum score required to pass/complete the course
7. **Course Code**: The code associated with the course
8. **Self Enroll**: If you can enroll in the class yourself without assistance from another user
9. **Approval**: If enrollment in the course needs to be approved by another user (i.e. manager, instructor, specific employee, etc.)
10. **Tags**: Keywords associated with the course that make it easy categorize and find in the catalog

The next section is the **Attachments** section, directly underneath the **Course Details**.
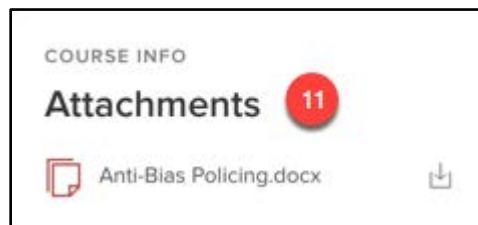

Figure 8: Course Details Page - Attachments

11. **Attachments**: Displays any attachments available for the course

The final section of the **Course Details Page** is the main body.

Figure 9: Course Details Page - Learner List & Course Content

12. **Learner List**: A display of learners currently enrolled in this course in the manager's hierarchy.
    a. The Learner List is divided by learners currently enrolled, learners pending enrollment, and learners on a waitlist for this course (waitlist only available for classroom courses)
    b. Note that this section is only available to Managers
13. **List View**: Details about each learner in the course; associated with the **Learner List**
    a. Includes: First Name, Last Name, Position, the due date of the course (if applicable), the status of the course, and any actions available
14. An **Enroll Others** button is available if you have direct reports and the appropriate permissions to enroll others
15. **Course Content**: Basic details of the custom online course content
    a. This section is specific to Custom Online Courses, and does not appear for Pre-Built Online Courses or Classroom Courses

TIP!

For security, the Learner List only displays learners
whom the user has access to

For Classroom Courses, in place of the above section, there's a Class List section for each occurrence of the course.

Figure 10: Course Details Page - Classes

16. **Classes**: A full list of every scheduled occurrence of this course
    a. **Class Name**: The title of the course
    b. **Date**: The Calendar Date of the class
    c. **Time**: The time of day the class occurs
    d. **Instructor**: Name of teaching staff
    e. **Classroom Location**: Where the course instruction takes place
    f. **Enrollment**: Number of learners enrolled in the class versus number of spaces available
    g. **Course Code**: The code associated with the course
    h. **View**: Pulls up the specific **Class Details Page** for this class instance

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TIP!

Where Online Courses allow you to enroll in the whole course,
you can only enroll in Classroom Course *classes* because they
have specific times associated with them

The **Class Details Page** is similar in appearance to the **Course Details Page**. All the details remain the same, but this page includes the enroll button and the **Learner List** view if you have the correct security permissions.

Enrolling via Course Catalog

Enrolling in any course through the **Course Catalog** is easy and can be done from either the **Course Card** or the **Course Details Page**.

Online Course Enrollment

You can easily add online courses to Your Activity by clicking **Enroll**. If an online course requires approval, you have to request approval before you can be enrolled in the course.

On the **Course Card**, the **Enroll** button is on the bottom of the card in blue.
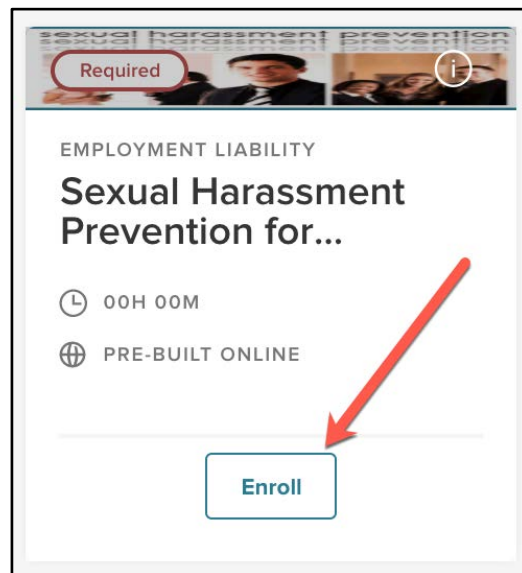

Figure 11: Course Card > Enroll

On the **Course Details Page**, the **Enroll** button is located at the bottom of the course description, also in blue.
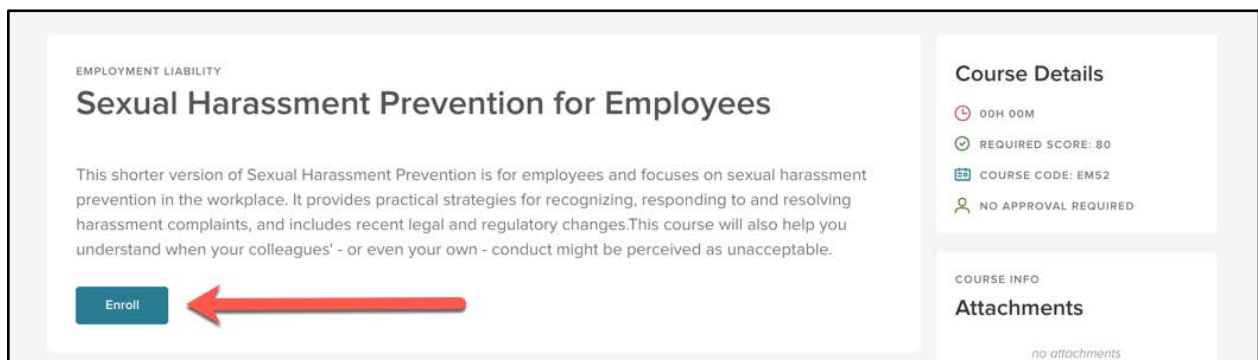

Figure 12: Course Details Page > Enroll

Once you've selected the **Enroll** button, the course is added to your **My Courses**!

If the course you've chosen to enroll in requires approval, a pop-up appears to confirm you want to request approval to join the class. From here, the appropriate user is notified of your request to take action on it.
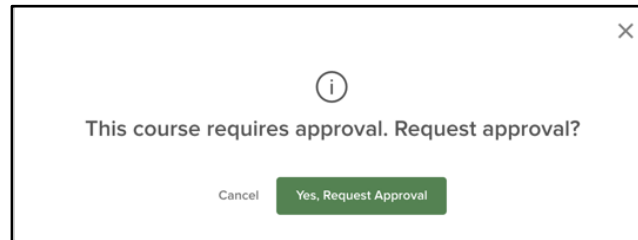

Figure 13: Request Approval Notification

Classroom Course Enrollment

Since Classroom Courses have associated locations and different class sessions, you can view the different classes available and pick a class that best fits your schedule.

From the **Course Card**, there is a **View Classes** button (instead of **Enroll** which appears for online courses).
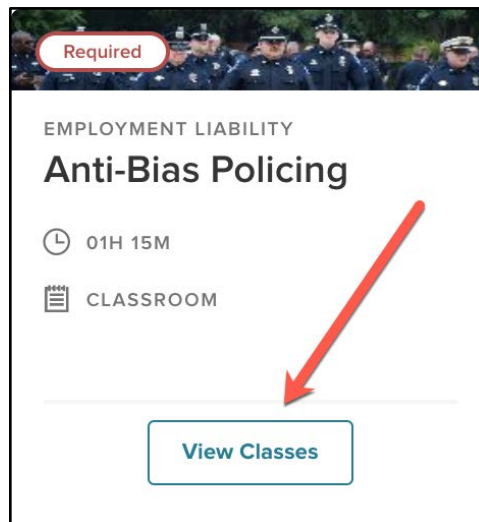

Figure 14: Course Card > View Classes

Click on the **View Classes** button for a flyout showing all classes associated with this course. Each class session includes the details for the date and time of the course, the instructor, the location, and how many learners are currently enrolled in the class.

Figure 15: Classroom Course Classes Flyout

Select the class occurrence you want to enroll in and click the **Enroll** button. If the class is full, the system gives you the option to join the waitlist for the course, if enabled. Waitlist features are optional configurations and won't always be enabled for classroom courses.

Figure 16: Class Flyout > Join Waitlist

If there's space in the class, then you become officially enrolled in that class. As with the **Course Card**, if the course requires approval, you can request approval by clicking the *"Yes, Request Approval"* button.

Calendar

Who Should Use This Section

All users (Employees, Managers, HR Admins) should use this section to learn how to enroll in courses via the calendar. This method of enrollment is particularly suited to enrolling in Classroom Courses, especially for learners who want to see when course offerings are available.

Navigating the Course Calendar

The Course Calendar gives you a visual view of courses you are currently enrolled in and classroom courses from the Course Catalog. This view allows you to see available upcoming classroom courses and how they fit into your schedule.

To access the Course Calendar, from the very right of the menu bar (just underneath your profile dropdown), select **Calendar**.
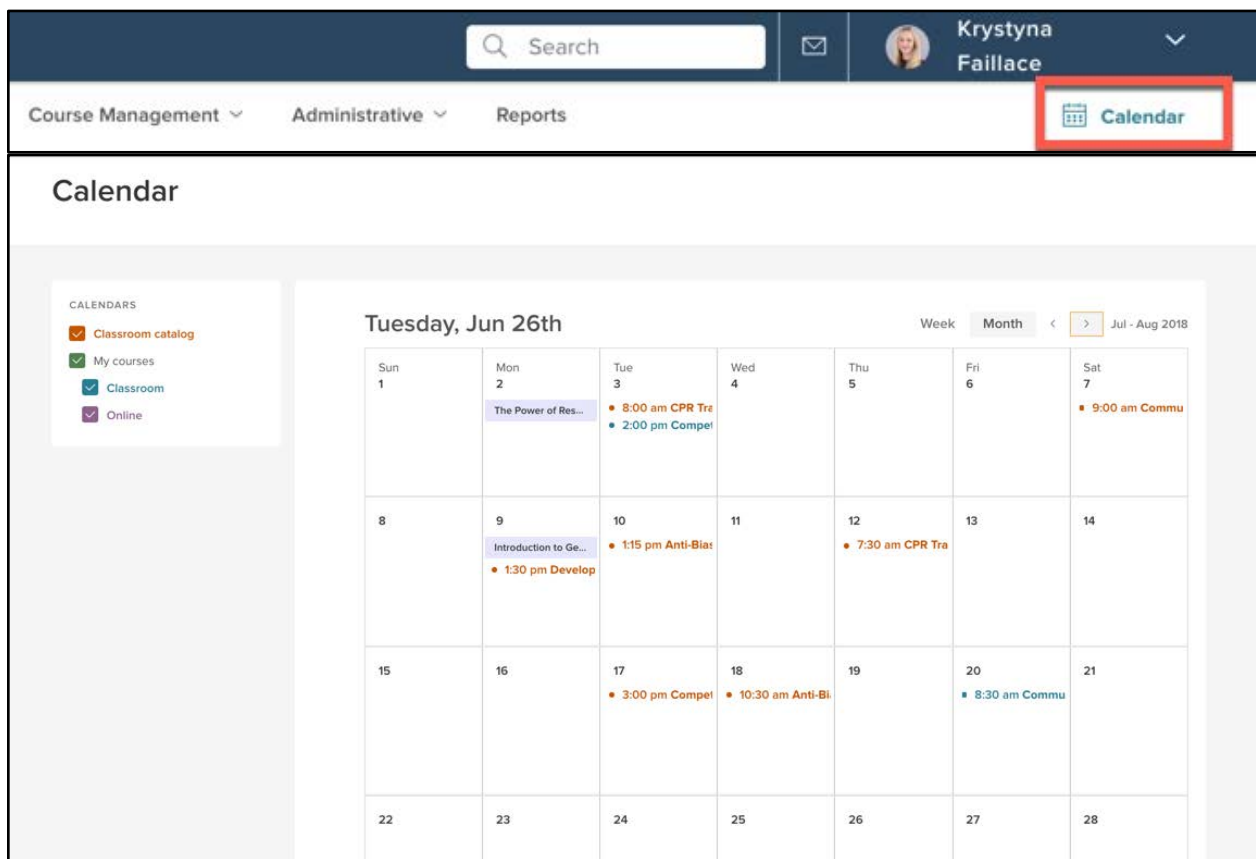

Figure 17: Calendar

Calendar Legend

The Calendar Legend displays to the left of the Calendar and lets you see at a glance what types of courses you are either enrolled in or are able to enroll in.
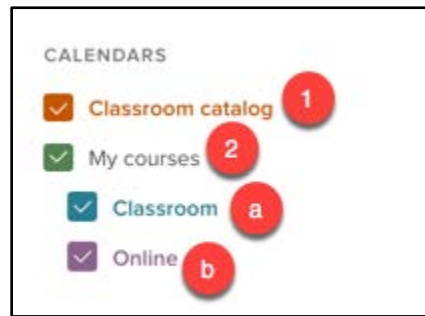
Figure 18: Calendar Legend

1. **Classroom Catalog**: All available classroom courses you are not currently enrolled in display in orange
2. **My Courses**: All courses you are currently enrolled in display in one of these two views:
    a. **Classroom**: In Blue - Classroom courses you are currently enrolled in
    b. **Online**: In Purple - Online courses you are currently enrolled in display

> **TIP!**
>
> Don't see any purple classes? Your Online Courses only show on the Calendar when they have a relative due date. This helps you better remember those time sensitive classes and stay compliant

You can edit your view of the calendar by clicking on any of the legend items. Focus on classes to enroll in by unchecking the **My Courses** legend option or use the Calendar to focus on upcoming classes by unchecking the **Classroom Catalog**.

The Calendar view can be changed from the default Month view to a Week view if desired. Navigate between date periods by using the left and right arrows beside the Week/Month view options.

Figure 19: Calendar Month/Week View Toggle

Enrolling via Calendar

In the Calendar, you can enroll in any available classroom course - displayed in orange. Click on any class that interests you to view the class details page. From here you can review information about the class, such as description, course length, or if there's a required score.

Figure 20: Calendar > Enroll

If you decide this a course you want to enroll in, simply click the **Enroll** button. If you have permission to do so, you can enroll other users from this page as well. This is useful for Managers and HR Admins looking for courses on specific dates/times to enroll their team in.

TIP!

You can only enroll into Classroom Courses from the Calendar. Learn how to enroll in online courses from Online Course Enrollment

Dashboard

Who Should Use This Section

Managers and HR with direct reports should use this section to learn how to enroll their direct reports in courses via the Dashboard. This method of enrollment is particularly convenient since the Dashboard is the page your LE system displays upon initially logging in.

As a manager, make sure your team members take necessary courses as soon as you sign in. It also allows you to enroll each of your Direct Reports into multiple courses at once.

Direct Reports

The Dashboard is your central location in Learn - it's the first page displayed when you log into the system. It gives you key metrics for your courses and contains all of the courses you're currently enrolled in in the **Your Activity** section.
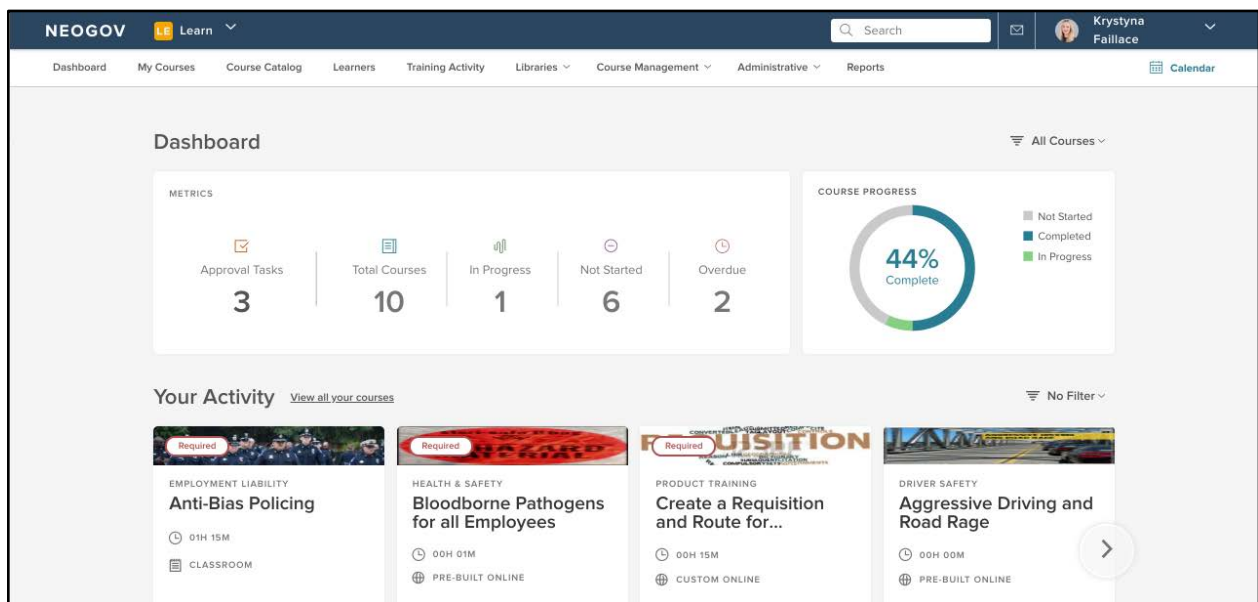
Figure 21: Learn Dashboard

The **Direct Reports** section can be found at the bottom of your Dashboard.
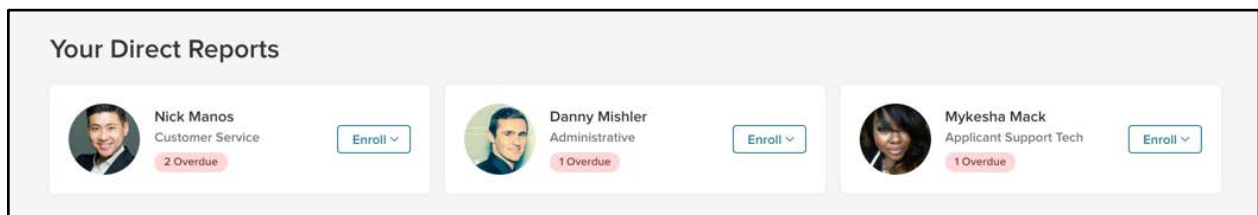
Figure 22: Your Direct Reports

This section displays the employee's name, position, and picture. From here you can easily see how many overdue courses they have - giving you the information needed to keep your team on track and maintain compliance. From here you can enroll an employee via the **Enroll Dropdown**.

Enroll Dropdown

The **Enroll Dropdown** is divided into Online Courses and Classroom courses.
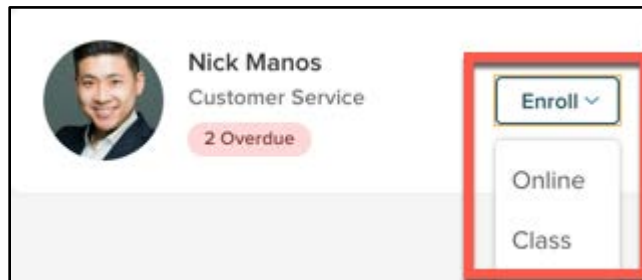

Figure 23: Enroll Dropdown

First, let's look at an Online Class. From here, a flyout opens with a catalog of online courses you can enroll your employee in. These courses are organized by name, category, type of course, and duration to make it easy to find the courses you want. You can click into each column to search within any sub-category.
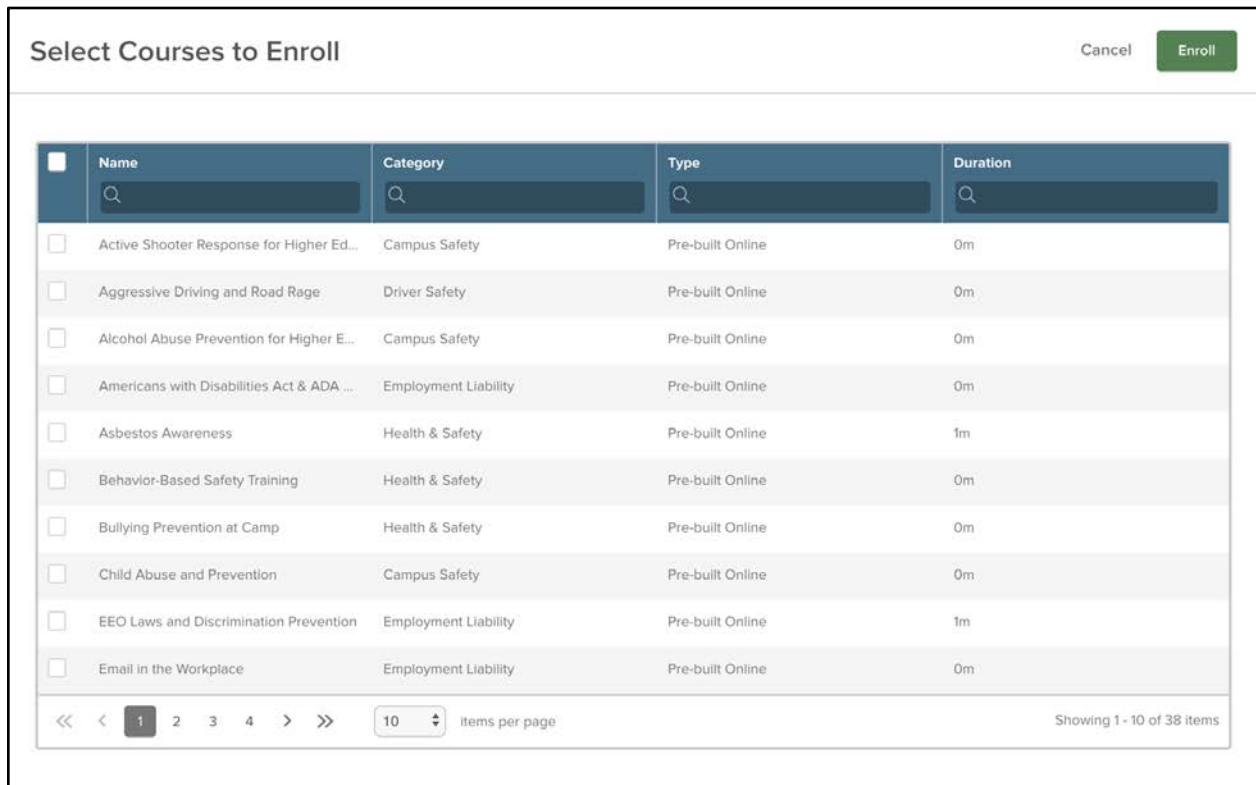
Figure 24: Enroll Dropdown > Online

Enrolling employees in this method allows you to bulk enroll your chosen Direct Report into multiple courses at once. Simply select the desired courses (or all) and then **Enroll**.

Figure 25: Enroll Dropdown > Online > Enroll

When enrolling a direct report into a Classroom Course, the process is mostly the same as with an Online course. Click **Classroom Course** under the Direct Report's **Enroll Dropdown**. A flyout opens with a catalog of available classroom courses.

Notice the view is similar to the Online Courses we just viewed. While the style is the same, the columns for Classroom Courses include the name of the course, its start and end time, the class size, and if a waitlist is enabled. Having these columns available allows for multiple occurrences for the same course to appear in the grid, helping you pick the most appropriate one for your Direct Report.

Figure 26: Enroll Dropdown > Classroom

Similar to Online Courses, enrolling employees in this method allows you to bulk enroll your chosen Direct Report into multiple Classroom Courses. Simply select the desired courses (or all) and then **Enroll**.

Figure 27: Enroll Dropdown > Classroom > Enroll

Once any necessary approvals have taken place for the courses, Direct Reports become enrolled in the course and receive an email notifying them of their enrollment.

For more information about the Dashboard, please see our Dashboard User Guide (Coming Soon).

![NEOGOV]

Learner List

Who Should Use This Section

Managers and HR should use this section to learn how to enroll others in courses via the Learner List. This method of enrollment is particularly useful for bulk enrolling multiple users into a course at once.

Navigating the Learner List

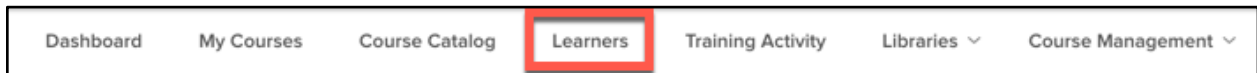To navigate to the **Learners List**, select **Learners** from the menu bar at the top of the page.

Figure 28: Menu Bar > Learners

From here, you are brought to a table that displays information associated to each employee you have access to.

The columns displayed include:

Figure 29: Learners List

1. **Employee Photo:** A photo of the employee
2. **First name:** Employee's first name
3. **Last name:** Employee's last name
4. **Direct Manager:** The employee's direct manager
5. **Department:** The title of the employee's department
6. **Position:** The title of the employee's position
7. **Start Date:** The employee's start date
8. **Online Access:** The status of the employee's account activation

9. **Active:** Whether the employee is active or inactive
10. **Email:** The employee's email address

In addition to the columns provided by default, we give you the option to add additional columns and remove and restructure the existing columns. To edit this grid view, select the column icon [IIII] above the top right corner of the table. A flyout appears with the following additional options:
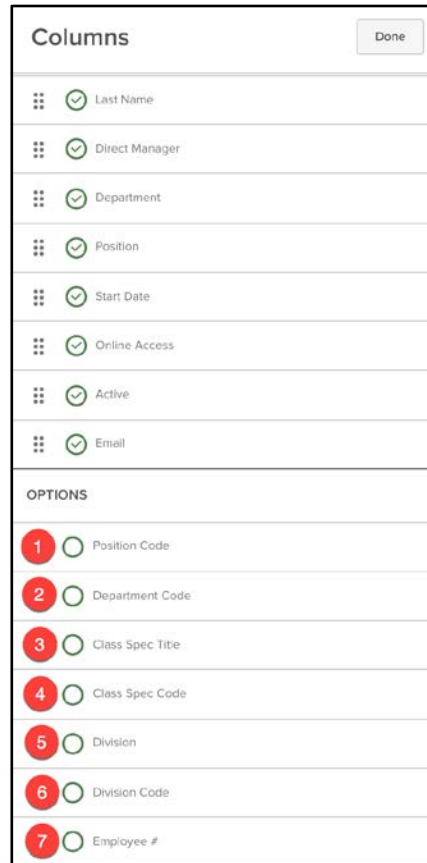
Figure 30: Column Options

1. **Position Code:** The unique code associated to the Position
2. **Department Code:** The unique code associated to the Department
3. **Class Spec Title:** The title of Class Spec
4. **Class Spec Code:** The unique code associated to the Class Spec
5. **Division:** The name of the Division
6. **Division Code:** The unique code associated to the Division
7. **Employee #:** The unique number associated to the employee

Columns are added by checking the green circle ⊘, and can be moved by dragging the dot grid ⠿. This allows you to customize the Learner List to best suit your needs for information about employees you need to see at a quick glance.

TIP!

To make updates to Employees or add new ones, visit the
Employee List in either Perform or Onboard

The Employee List is always in sync between these three products

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Bulk Actions

The main advantage of enrolling in courses via the Learner List is the ability to bulk enroll employees. Instead of enrolling direct reports one by one, using the Learner List saves you time by enrolling everyone at once.

To enroll employees in a course, select the appropriate employees to enroll by clicking the checkbox to the left of each employee (or select all). Once you've selected all necessary employees, click the **Bulk Actions** button above the top left corner of the table.
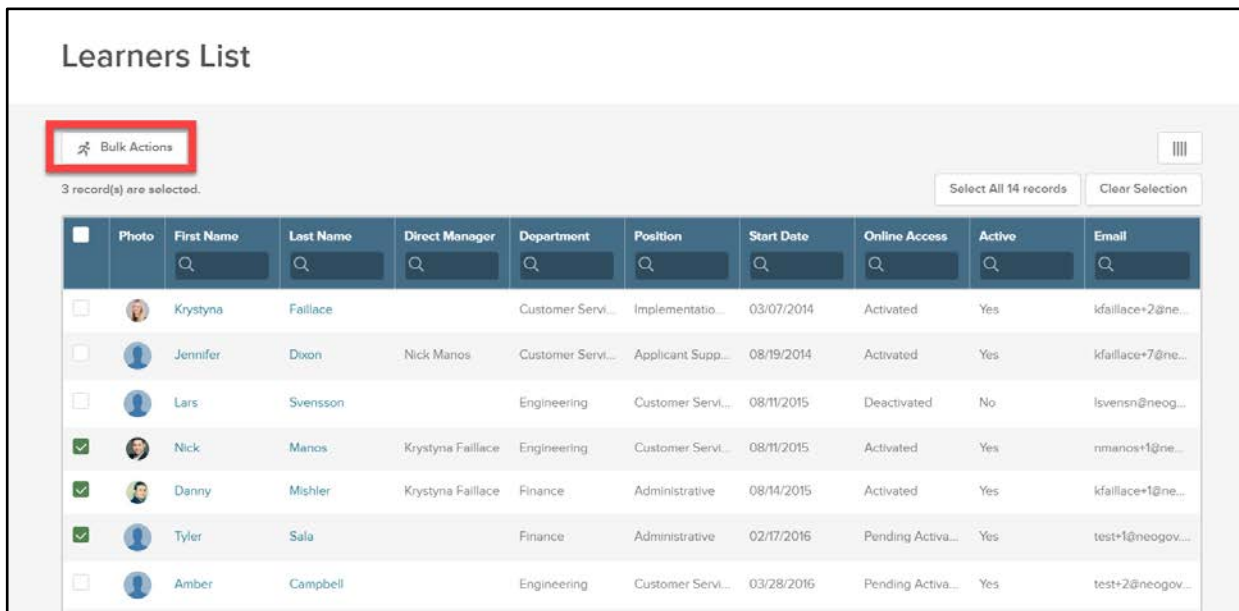

Figure 31: Learners List > Bulk Actions

A flyout appears that gives you the option to Enroll in a course or by Association.
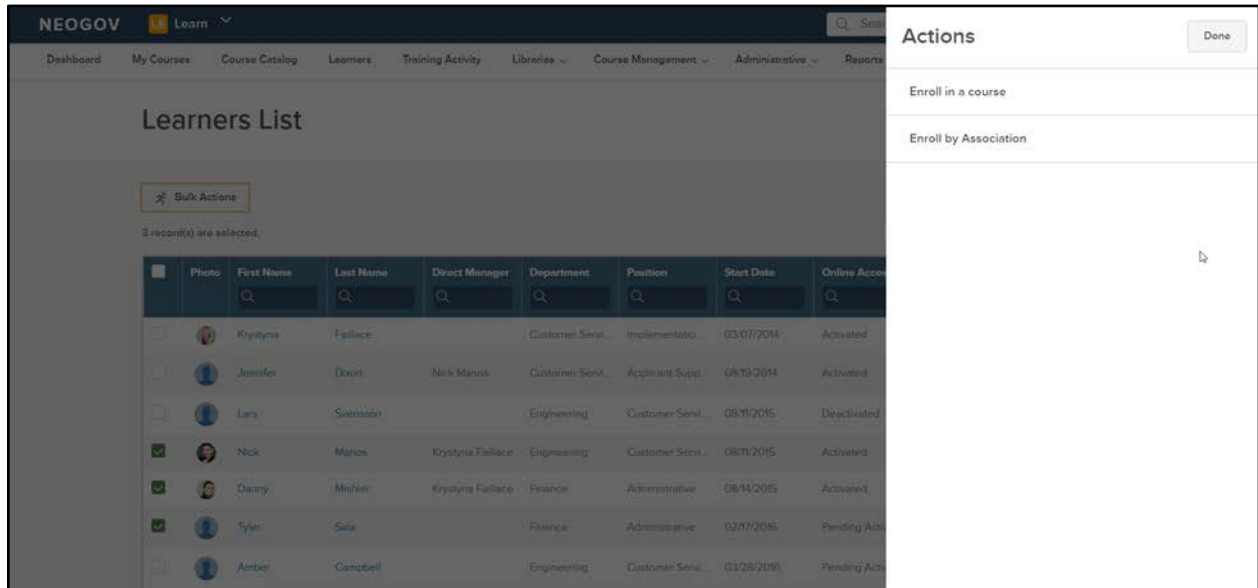
Figure 32: Learners List > Bulk Actions > Actions

To enroll in a course, select the **Enroll in a course** option from the flyout. This brings you to a page that has the course cards of the available Online Courses. Each Course Card displays a header Image, the type of course (custom online/pre-built online), the course name, and the length of course.

Select the course you wish to enroll your employees in and select **Enroll** at the top right corner of the page.

TIP!

While using **Bulk Enroll**, you can only enroll learners in one course at a time

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From the **Bulk Actions** screen, you can also bulk enroll employees by Association. For more information please view our Associations User Guide (Coming Soon).

Admin Catalog

Who Should Use This Section

HR Admins should use this section to learn how to enroll in courses via the Admin Catalog. This method of enrollment is particularly useful for HR Administrators who want to quickly enroll users by various organizational entities after creating a course from this menu.

Navigating the Admin Catalog

To navigate to the **Admin Catalog**, select Course Management from the top menu bar then Admin Catalog from the dropdown.

Figure 33: Menu Bar > Course Management > Admin Catalog

The **Admin Catalog** is a central place for administrators to manage all courses and enrollments in the system. It contains all courses, both published and unpublished.
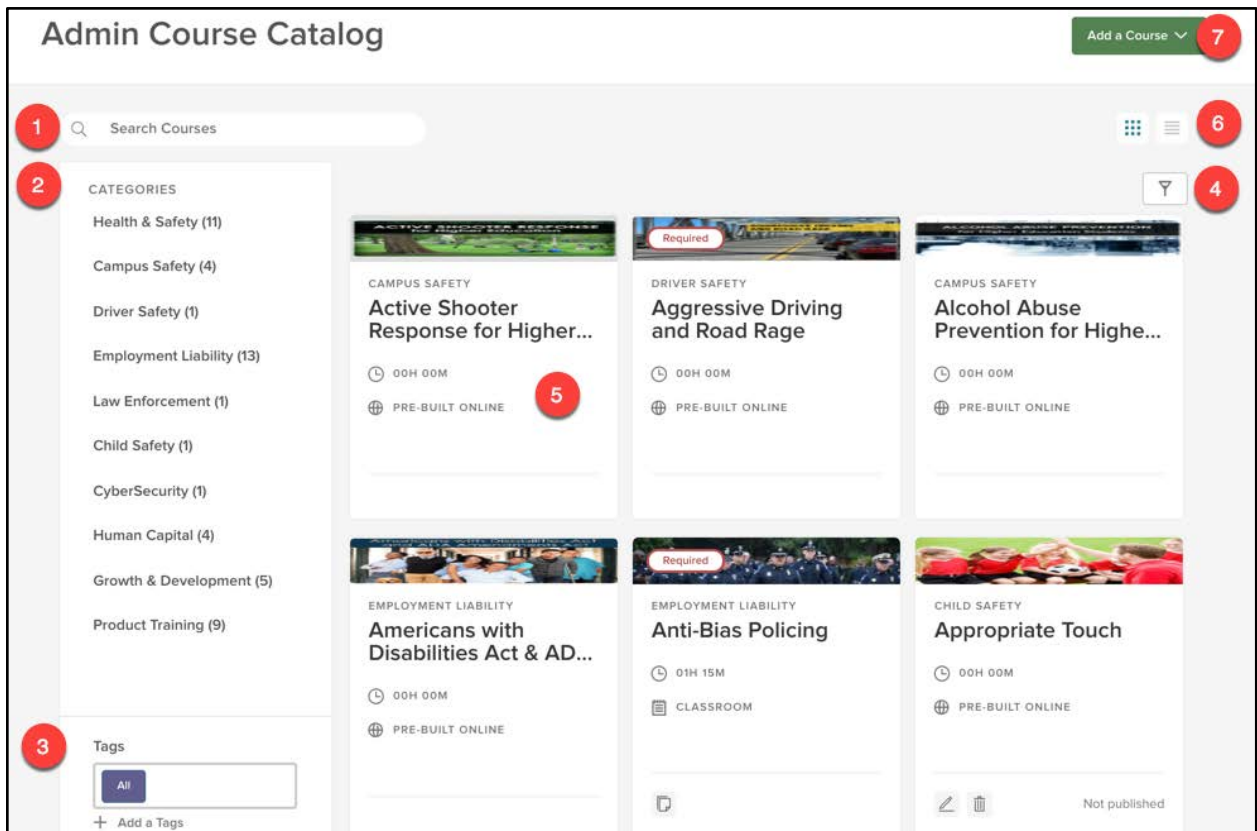
Figure 34: Admin Course Catalog

1. **Search Bar**: Type into this bar to look for a specific course title

2. **Categories Sidebar**: Narrow courses down by their associated category
   a. Having similar courses grouped by topic aids learners in finding relevant coursework
3. **Tags**: Narrow courses down by associated tags or keywords
   a. If learners are looking to improve on a specific competency, such as communication, then this is the best way to find those types of courses
4. **Filters**: Limit the course view in the **Admin Catalog** with specific requirements
   a. Filters available include: course name, course code, category, delivery method, type of course, number of classes (classroom only), duration, published, last updated by, last updated on, passing score, and approval required
   b. Multiple filters can be active at once
5. **Course Card**: Bite-sized information about a particular course
   a. At a glance you can see if the course is required for you
   b. See Course Cards for more information
6. **Catalog View**: Toggle the **Admin Catalog** view by either the default card view or list view
7. **Add a Course Button**: Create a Classroom, Pre-Built Online, or Custom Online course

Enrolling Learners

To enroll in a course via the **Admin Catalog**, click into the course by clicking the Course Name on the Course Card. The **Enroll Learners** dropdown exists <u>only</u> in the Admin Course Catalog and appears only to HR Administrators or Users with the appropriate permissions.

Online Course Enrollment

To enroll in an Online Course, select **Enroll Learners** from the **Course Details Page**. You can select to enroll learners via Employees, Departments, Positions, Divisions, or Class Spec.

Figure 35: Online Enroll Learners Dropdown

Once you select the method to enroll learners, a popup appears with a list of all associated individuals you can enroll. From here, select any and all learners to enroll and select **Enroll Employees**.

Figure 36: Enroll Learners Dropdown > Employees

Classroom Course Enrollment

Classroom Courses require one more step to enroll than Online Courses. This is because Classroom Courses have associated locations and different class sessions you can enroll in. Having these different classes available allows you to pick a class that best fits your schedule.

Once in the **Course Details Page**, select the eye icon next to the class time you wish to enroll in.

Figure 37: Course Details Page > View (Eye) Icon

Similar to the Online Course Enrollment, select the **Enroll Learners** dropdown to add learners to the class.
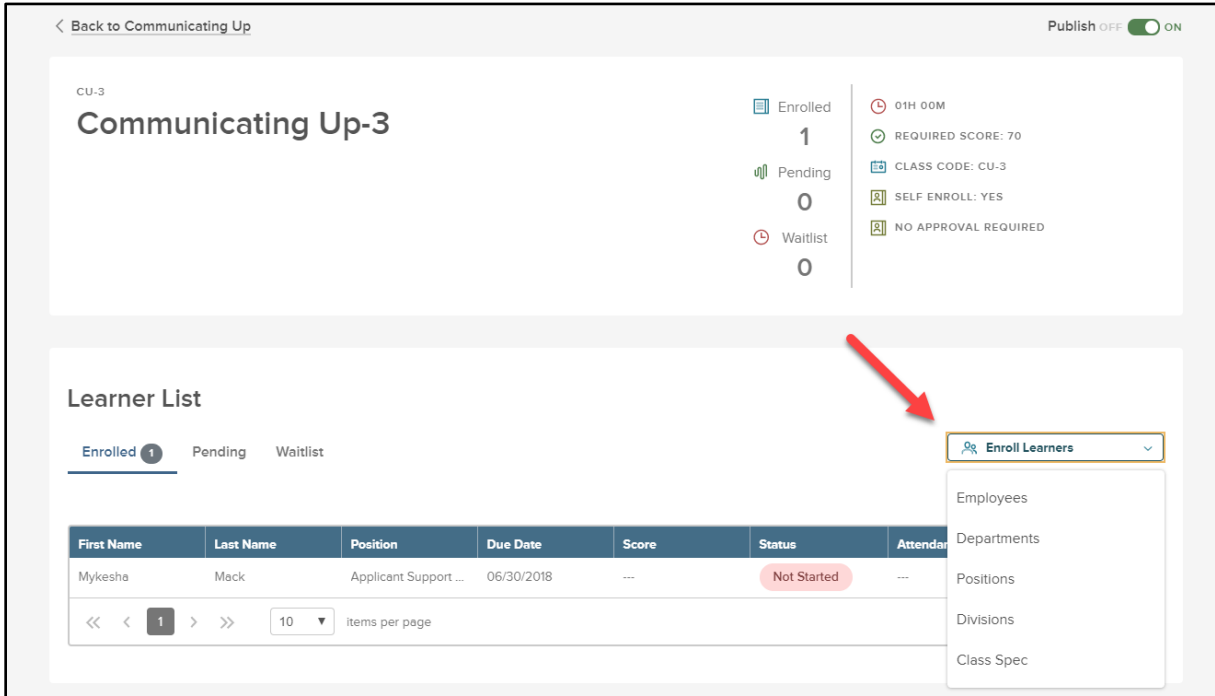
Figure 38: Classroom Enroll Learners Dropdown

Once a user is enrolled in a class, they receive an email notification that they've been enrolled. This email is sent out both when you enroll another individual in a course, and when you enroll yourself.

It is important to remember that even if you're enrolling learners as an HR Administrator, those Enrollment Approvals (if enabled) for courses still exist and must be approved appropriately.