Series F: Beyond the Basics

Table of Contents

Overview

Once you've gotten a grasp on the basics of Learn, you're ready to explore some of the additional features we've made available for you. Many of these functions are available for LE Administrators or are features that can be enabled by LE Administrators.

Before You Use This Guide

Users must have an Administrator account created for them in the Learn system. Please contact NEOGOV if an account has not yet been set up for you.

Who Should Use This Guide

This guide is intended to be used by LE Administrators and Managers to gain familiarity with some additional functionality.

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

Security Profiles

Who Should Use This Section

This section is intended for Learn Administrators to review the different security permissions available for HR Admins, HR Users, Managers, and Employees prior to collaborating with your NEOGOV Implementation Consultant. Please note that NEOGOV configures these security settings for you.

When considering settings between HR Admins and HR Users it's important to note that while both roles are very similar, based on default permissions, HR Users do not have access to the Administrative Menu (Users and Settings).

HR Users also cannot add, edit, or delete Course Categories and Classroom Locations in the Library. However, both roles have full edit capabilities to all course types and can update rosters. These default permissions can be adjusted as necessary if customers would like HR Users to have more or less access.

Enrollment Security Profiles

The main security settings available are for course enrollment. These settings are either enabled or disabled for each user profile. Below is a table of each Security Permission with its default setting.

SECURITY OBJECT	HR ADMIN	HR USER	MANAGER	EMPLOYEE
Ability to Self-Enroll: Users can enroll themselves in courses	Yes	Yes	Yes	Yes
Ability to Edit Self-Enrollment: Users can modify the due dates of courses in which they've enrolled themselves	Yes	Yes	No	No
Ability to Enroll Others: Users can enroll employees in their hierarchy into courses and can add External Learning to their profiles	Yes	Yes	Yes	No
Ability to Edit Others' Enrollment: Users can modify attributes of others' enrollment, such as due date	Yes	Yes	No	No
Ability to Drop Enrollment: Users can un-enroll themselves in courses	Yes	Yes	Yes	Yes
Ability to Drop Others' Enrollment: Users can cancel enrollment in courses for employees they have access to	Yes	Yes	Yes	No
Ability to Update Roster: Users can update learner's score and/or status on a roster for a class or online course	Yes	Yes	No	No
Ability to Unregister Self from Learning Plan: Users can cancel enrollment in Learning Plans they are registered to	Yes	Yes	Yes	No
Ability to Unregister Others from Learning Plan: Users can cancel enrollment in Learning Plans others are registered to	Yes	Yes	Yes	No

Table 1: Enrollment Security Objects

Additional Security Profiles

These settings are used to ensure all the users within your system have access to the correct sections. Similar to other NEOGOV products, the types of permissions include Create, Read, Update, and Delete.

SECURITY OBJECT	DESCRIPTION
Classroom Courses	Controls access to the Admin Course Catalog and the ability to add, edit, and remove Classroom Courses within the system
Pre-Built Online Courses	Controls access to the Admin Course Catalog and the ability to add, edit, and remove Pre-Built Online Courses within the system
Custom Online Courses	Controls access to the Admin Course Catalog and the ability to add, edit, and remove Custom Online Courses within the system
Class	Controls the ability to view, add, edit, and remove class instances in a course within the system
External Learning	Controls the ability to view, add, edit, and remove instances of External Training within the Library
External Learning – Learner Profile	Controls the ability to view, add, edit, and remove External Learning that user added to their profile
Learning Plan	Controls the ability to view, add, edit, and remove Learning Plans within the system
Certifications/Licenses	Controls the ability to view, add, edit, and remove Certifications/Licenses within the system
Certification/License – Learner Profile	Controls the ability to view, add, edit, and remove Certifications/Licenses to a Learner's Profile

Table 2: Additional Security Objects

External Learning

Who Should Use This Section

Any user who has permissions for adding External Learning Events. This can also be any user who can enroll others in a course.

Navigating to the External Learning Library

External Learnings can be found under the **Libraries** drop down menu. External Learnings can be added to the Library before they are used on Learner profiles. By default, HR Admins and HR Users can add External Learnings to the Library.

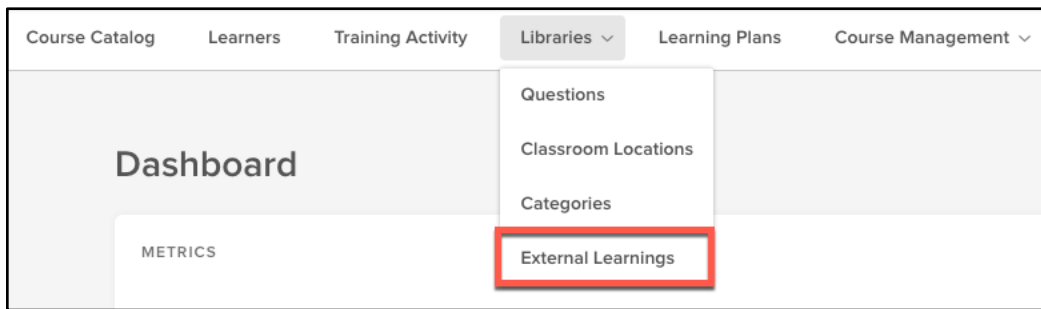*Figure 1: Libraries > External Learnings*

Click on the **Libraries** drop down menu, then select **External Learnings**.

Adding External Learnings to the Library

The External Learning Library includes any external learning events that have already been added by another user. To add an External Learning event, click the **Add** button at the top of the page.
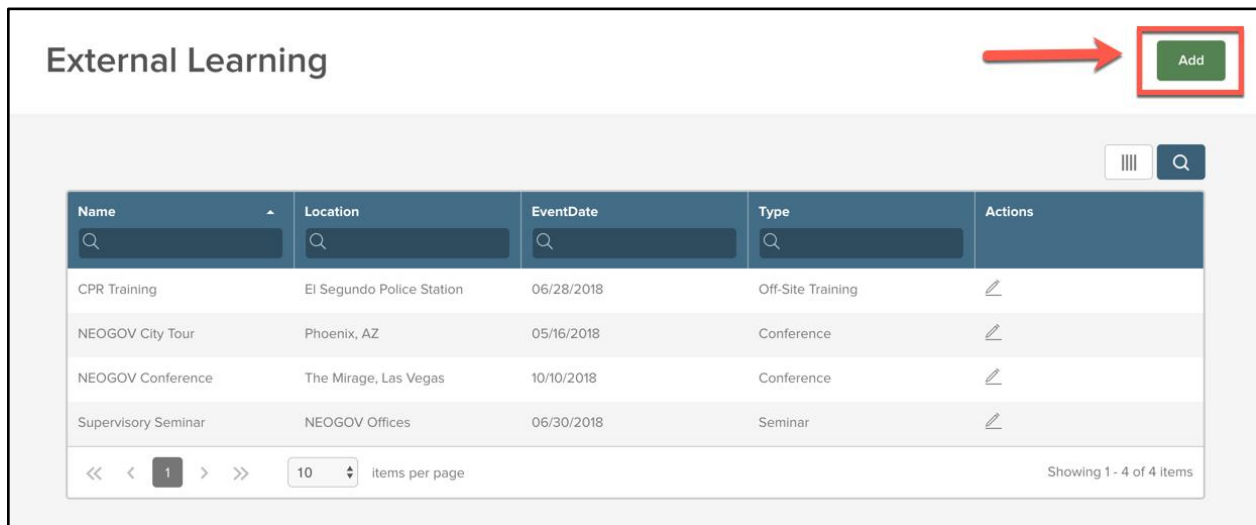

Figure 2: External Learnings > Add

Complete the Add External Learning Flyout to add an External Learning event to the Library. Note that all fields with an asterisk are required in order to save the event.

Figure 3: Add External Learning Flyout

1. **Learning Type***: Click the dropdown menu to select the type of learning this event reflects
   a. Options Include: Conference, Seminar, Webinar, Off-Site Training, and Other
2. **External Learning Name***: Type in the External Learning
3. **Event Date:** Click the calendar icon and select the date of the External Learning
4. **Duration**: Length of the External Learning
5. **Location Name***: Type in where the event took place
6. **Address:** Type the physical address of where the event took place
   a. Note: The **Address, City, State** and **Zip** fields are optional

7. **City:** Type the city in which the event took place
8. **State:** Click the drop-down menu to select the State in which the event took place
9. **Zip:** Type in the zip code in which the event took place
10. **CEU Credits**: Enter the number of CEU credits granted (if applicable)
11. **Save:** Click save at the top of the page to save your External Learning event

Now that the External Learning event has been created, it is available in the Library and can be used on the Learner profile.

Editing External Learnings

To edit an External Learning event, click on the **Pencil Icon** in the **Actions** column.

Figure 4: Edit External Learning Icon

Make the necessary changes to the External Learning event in the Edit External Learning flyout. Be sure to click save to keep your changes.

Figure 5: Save External Learning

TIP!

If the External Learning event is updated in the Library, the changes also reflect on the Learner Profile

Deleting an External Learning

To ensure all records are accurately retained, the system does not allow an External Learning Event to be deleted from the Library if it is added to a Learner Profile.

TIP!

An External Learning Event can only be deleted if it is
not added to any Learner Profile

To delete an External Learning that has not been added to any Learner Profiles, click the **Trash Can Icon** in the **Actions** column, then select **Yes**.

Name	Location	EventDate	Type	Actions
CPR Training	El Segundo Police Station	06/28/2018	Off-Site Training	✎
NEOGOV City Tour	Phoenix, AZ	05/16/2018	Conference	✎
NEOGOV Conference	The Mirage, Las Vegas	10/10/2018	Conference	✎
Public Safety Department Traini...	LA Training Center	01/30/2019	Off-Site Training	✎
Webinar	Online		Webinar	🗑

Figure 6: Delete External Learning Icon

Are you sure you want to delete this External Learning?

Cancel   Yes
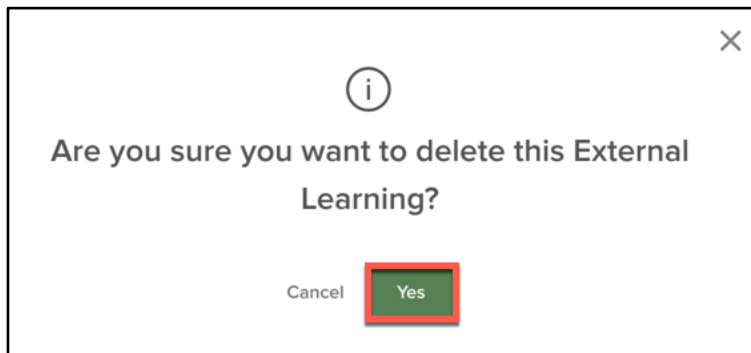
Figure 7: Deletion Confirmation

TIP!

To have the Trash Can Icon appear in the Actions column to delete an
External Learning, it first has to be deleted from each Learner Profile

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Adding External Learnings to a Learner Profile

External Learnings can be added to a Learner through the **Learner Profile**. Having External Learnings directly on the Learner Profile allows employees and managers to easily tack and view these trainings, keeping everyone involved informed of the Learner's progress.

By default, all learners can add External Learnings to their own profiles. HR Admins, HR Users, and Managers can add External Learnings to any learner whom they have permissions to access. However, learners cannot delete External Learnings added by other employees.

Figure 8: Learner Profile > External Learnings

To add an External Learning to a Learner Profile, click the **Add External Learning** button.

Figure 9: Add External Learning Button

Complete the flyout to add an External Learning to the Learner Profile. Note that fields with an asterisk are required.

First, select from the list of External Learning options that have been added to the Library from the External Learning Name dropdown. Use the search bar to find a specific External Learning. Users with the necessary permissions can use the plus (+) icon to add a new External Learning directly from the profile. Any new External Learning added is automatically added to the Library once saved.

Figure 10: External Learning Dropdown

Once you have selected the External Learning to add, you're given the option to update details for three fields: Event Date, Score, and Duration. You're also able to add an attachment for the Learner at this point. All other fields, such as the event name and location, are uneditable since those specifics are pulled from the Library entry.

Figure 11: External Learning Score

The newly added External Learning event shows in the External Learnings section of the Learner Profile.

Figure 12: External Learning Shown on Profile

To delete or edit an External Training, click the **Delete** or **Edit** button.

Figure 13: Delete/Edit External Learning Button

External Learnings added to a Learner Profile appear in the Learner's transcript with the information of the external event, ensuring that each type of learning your Learner completes is retained in one place.

Associations

Who Should Use This Section

This section is intended for LE Administrators to learn how to set up automatic course enrollment.

Add Associations

In Learn, Associations can be used to associate an individual or a group of individuals to a specific course. This is useful to ensure that your employees are paired with and enrolled in certain courses they need to take, helping you stay compliant.

Navigate to 'Course Management' and select 'Admin Catalog'. The Admin Catalog is a central place for Administrators to manage all courses and enrollments in their system.
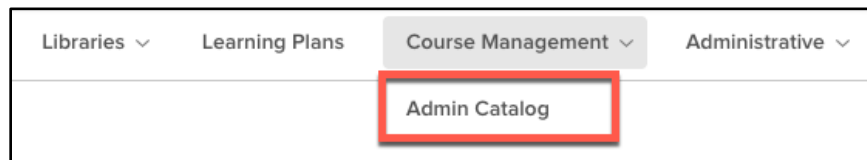

Figure 14: Course Management > Admin Catalog

From the Admin Catalog, you can locate a course by entering the name in the search bar on the left, by selecting the corresponding category, or by simply selecting the course title.

TIP!

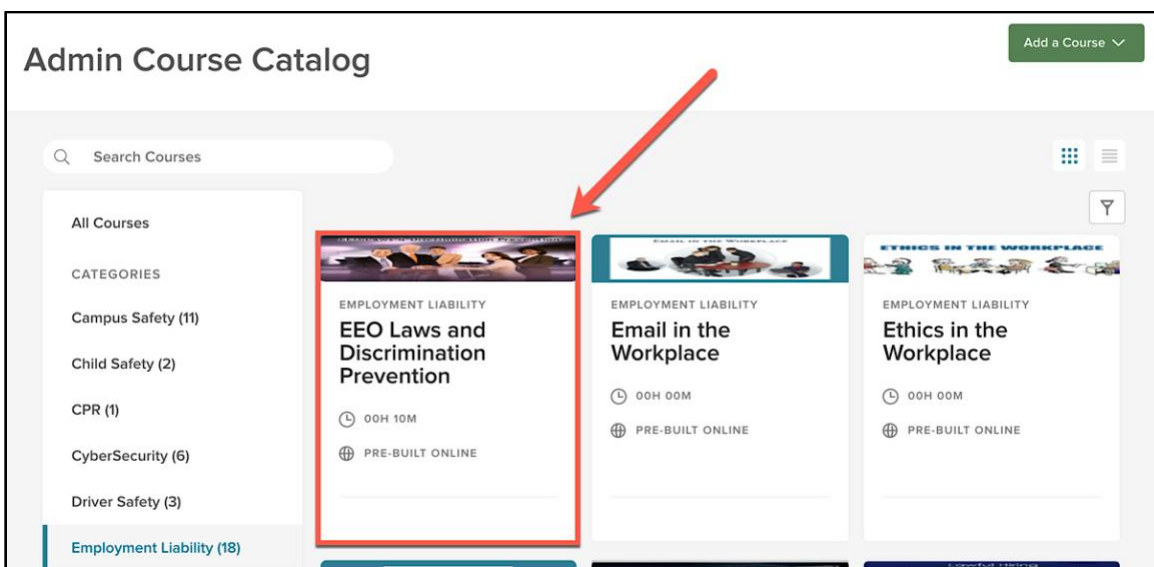Associations can only be made for Pre-Built Online and Custom Online Courses

Figure 15: Select a Course

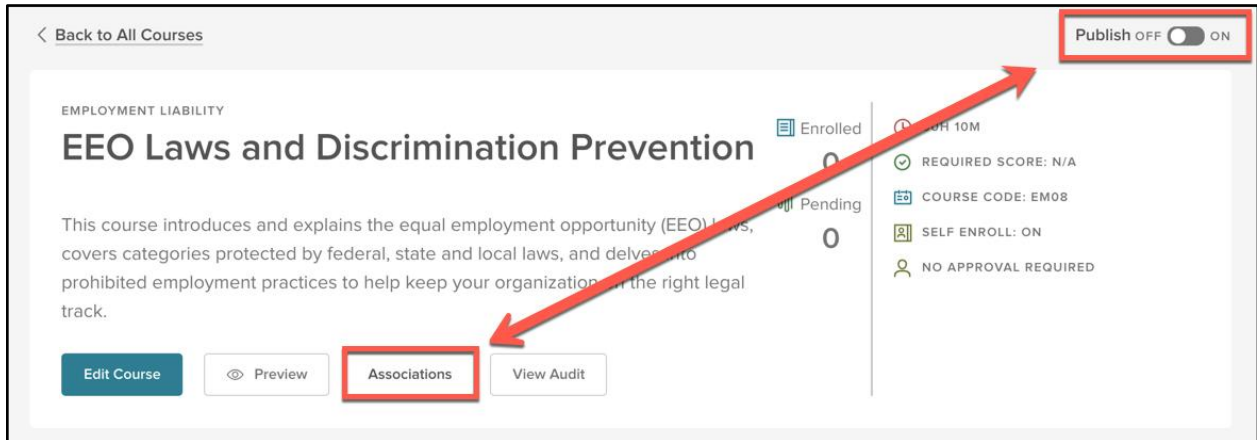Upon selecting the course, you are taken into the course details page.

Figure 16: Course Details Page > Associations

You have the option to associate users by 'Associations' or 'Employees.'
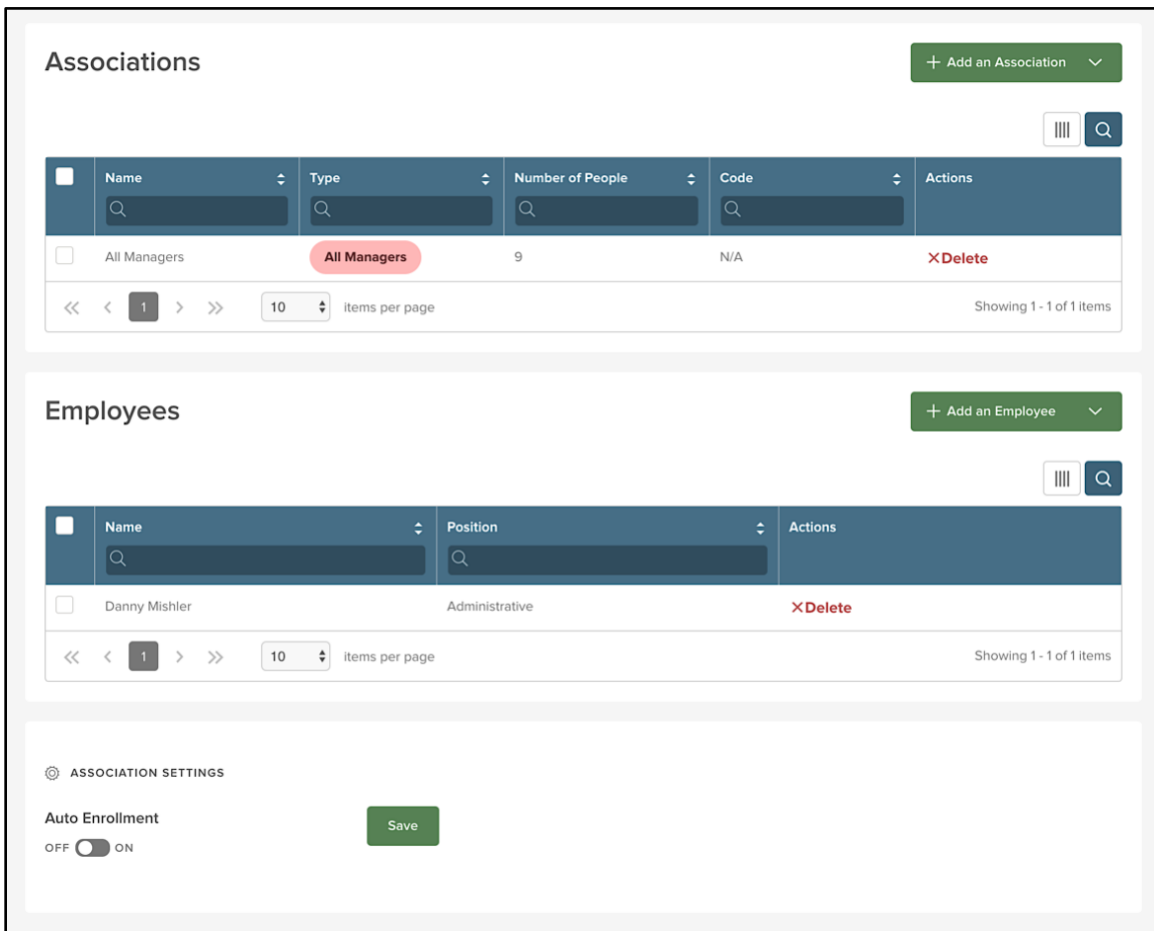

Figure 17: Associations Page

By selecting the "Add an Association" dropdown menu, you have the option to select All for all employees, All Managers, From Position, From Department, From Division, or From Class Spec. You may select one or a combination of these options.
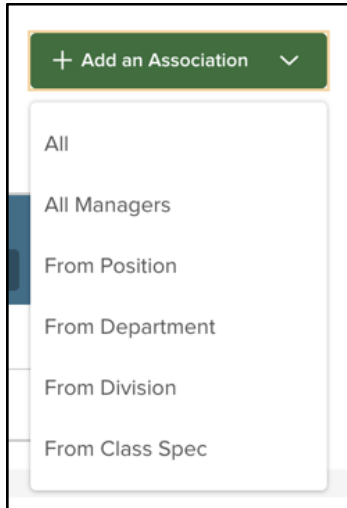

Figure 18: Add an Association Dropdown

For this example, choose 'All Managers' so any user at your organization with the Manager role is associated to the EEO Laws and Discrimination Prevention course to help prevent litigation.
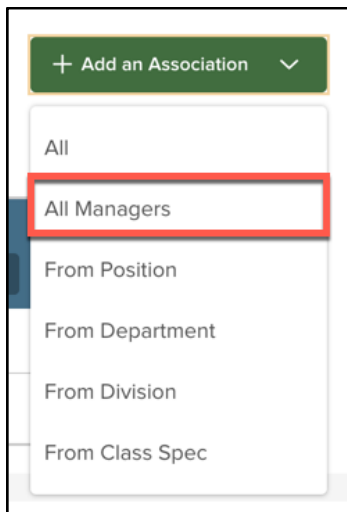

Figure 19: Select All Managers

Use the *All Managers* option to easily associate appropriate hiring courses to your managers to help stay compliant and avoid litigation

For example, a Lawful Hiring course your managers are required to take

Course associations allow you to pair employees to department or job-specific training based on various organizational attributes. Rather than finding new employees who may fit the criteria for specific training, assigning associations to a course allows the system to remember these pairings for both existing and new employees going forward, saving HR administrators valuable time.

If you have a course where you need to only enroll certain individuals, you can do so by selecting "Add an employee" from the 'Employees'' section, then you can search for the employee by clicking the "Search Employee" text field.
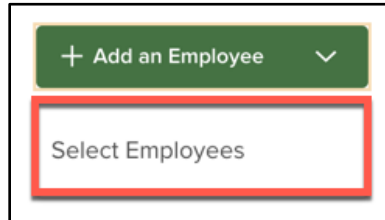

Figure 20: Add an Employee > Select Employees

Upon selecting the "Search Employee" text field, you can search for the employee by their first name, last name, or position. You can also select the checkbox in the blue header to select all employees.
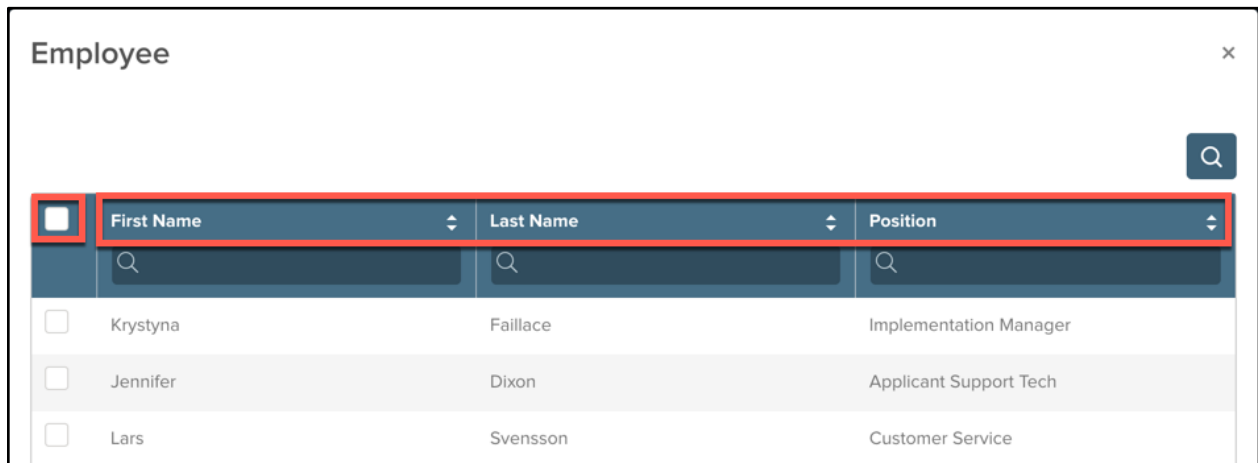

Figure 21: Employee Search

You can also set an auto-enrollment at the bottom of this page. By default, auto-enrollment is turned off. To enable auto-enrollment, turn the toggle 'on' and select 'save' to save your changes. If enabled, once a day, the system auto-enrolls employees based on their associations to a course.
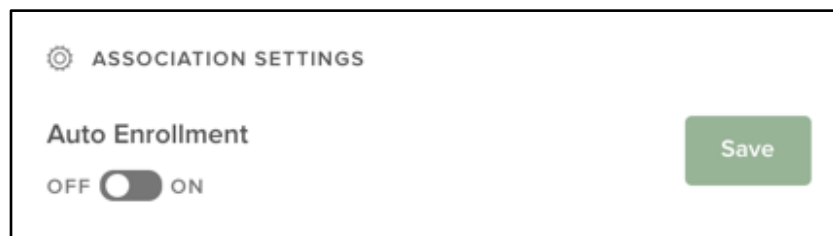

Figure 22: Auto Enrollment Association Settings

Enroll Associated Users to a Course

Once the managers have been associated to this course, it is important to note that they are not yet enrolled in the course. In order to enroll them, access the Learners List.
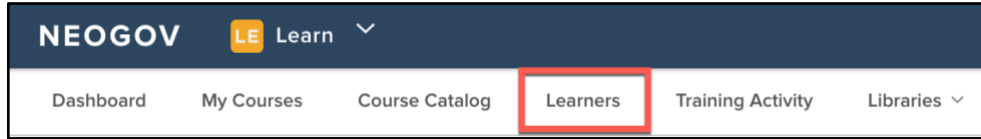

Figure 23: Learners Header

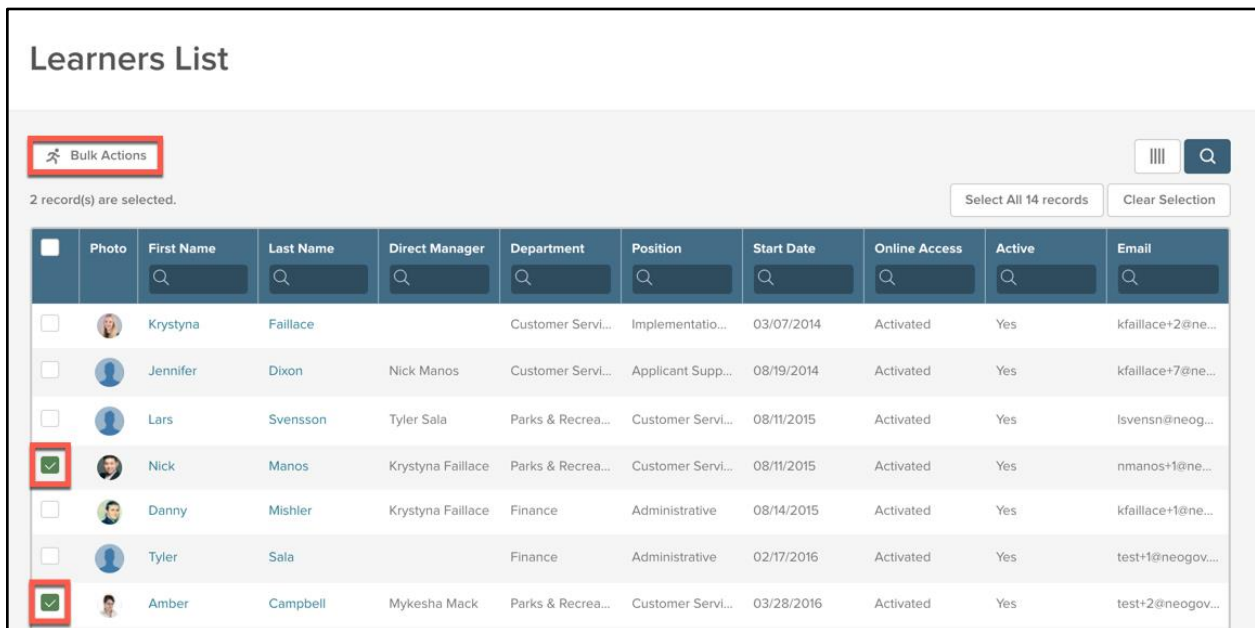From here, select the appropriate learners and choose "Bulk Actions".

Figure 24: Learners List > Bulk Actions

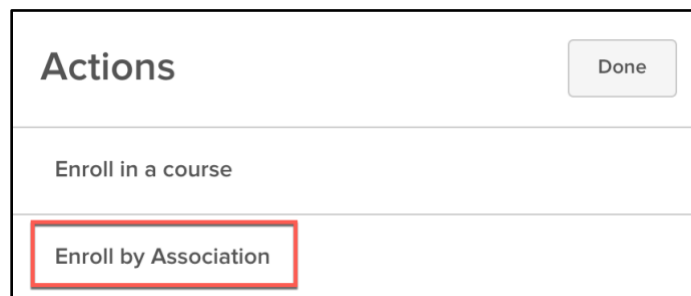Then select **Enroll by Association**.

Figure 25: Enroll by Association

You're then shown a preview of all associated courses. Hit **Submit** when you are ready.
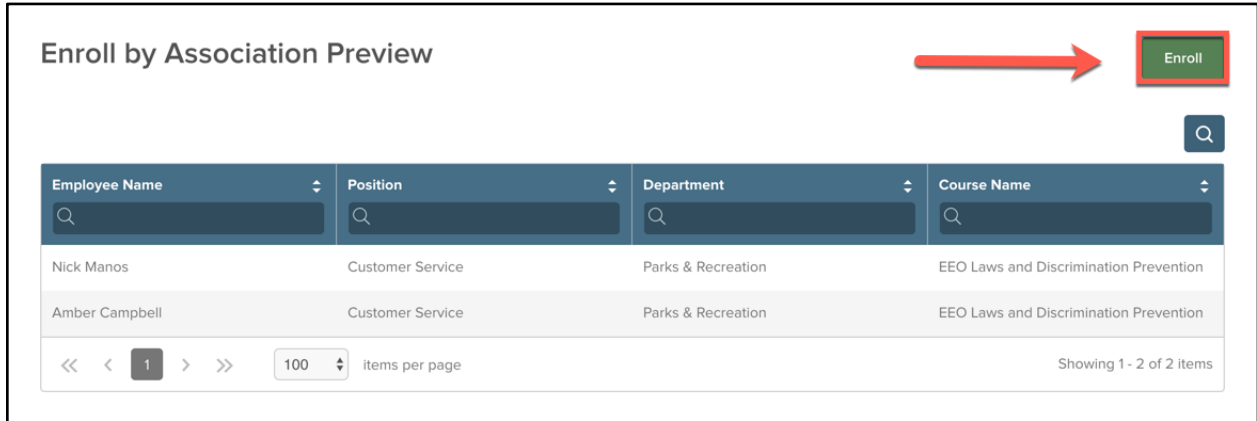
Figure 26: Enroll by Associations Preview

On the next screen, a success message appears once the enrollment by association is complete.

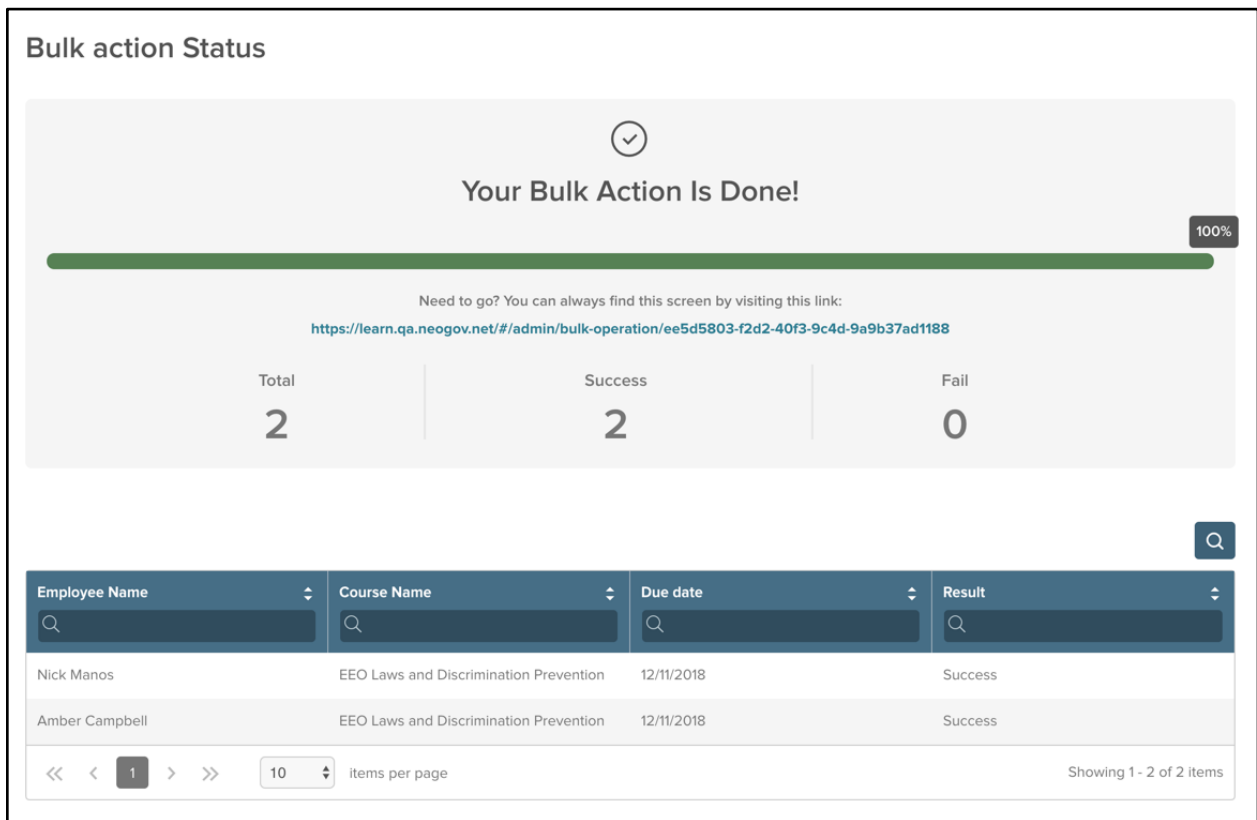*Figure 27: Bulk Action Status Success*

In addition to manual enrollments, Learn also has an auto-enrollment option, saving administrators even more time. This is a great feature to use because any time a new employee is added to the system based on their associations, they are automatically enrolled into the course. This saves you the extra step of having to manually enroll the users. See Figure 22 for details.

Learning Plans

Overview

Learning Plans, also known as curriculums or learning paths, are a collection of courses that can be grouped together and assigned to an employee. They are most commonly used to provide a series of trainings to aid continued employee development or career pathing or support the assignment and tracking of certification programs.

Who Should Use This Section

This section is intended for HR Admins and HR Users, as they are able to create and manage Learning Plans by default. However, Managers can be given permission to create Learning Plans to assign to their direct reports or anyone within their full hierarchy and should also utilize this section for guidance. To enable this permission for Managers, please contact NEOGOV.

Learners should use the Learner Profile section to learn how to access the Learning Plans they have been assigned to.

Navigating Learning Plans

Learning Plan Menu

The Administrative view of the Learning Plans can be accessed via the same-named menu bar item. This menu item is also available for users with the Learning Plans security permission.
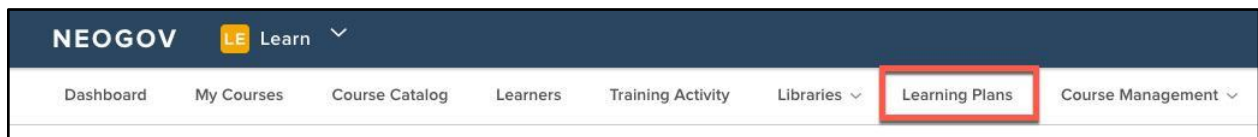
Figure 28: Menu > Learning Plans

Clicking the **Learning Plans** menu loads the **Leaning Plans** library. Here you can see all created Learning Plans with details such as how many courses are involved, how many learners are enrolled, and whether the plan is published or not. This is also where an Administrator (or other qualified user) can add a new Learning Plan.
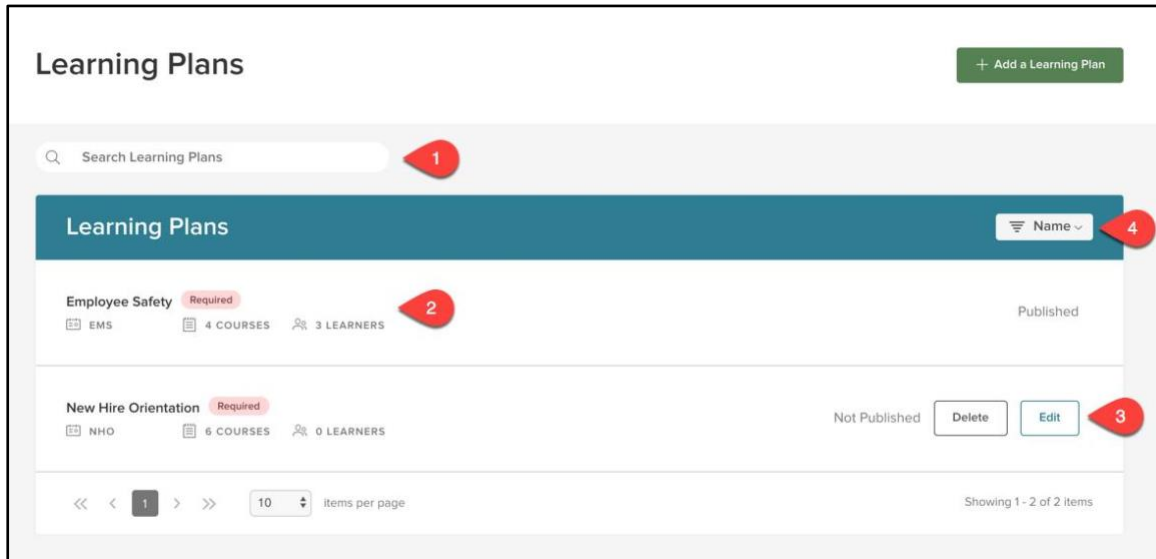
Figure 29: Learning Plans Library

1. **Search**: Type here to look for a specific Learning Plan
2. **Learning Plan Information**: Shows key components of a Learning Plan, including the title, Learning Plan Code, how many courses involved, and how many learners are currently enrolled
3. **Published**: Whether or not the Learning Plan is Published
   a. If the Learning Plan is *not* published, you are given options to edit or delete the Learning Plan
4. **Filter**: Use this to sort through Learning Plans by type

Creating Learning Plans

HR Admins, HR Users, and other users with security permissions can create new Learning Plans from the Learning Plan Menu.

Create a Learning Plan

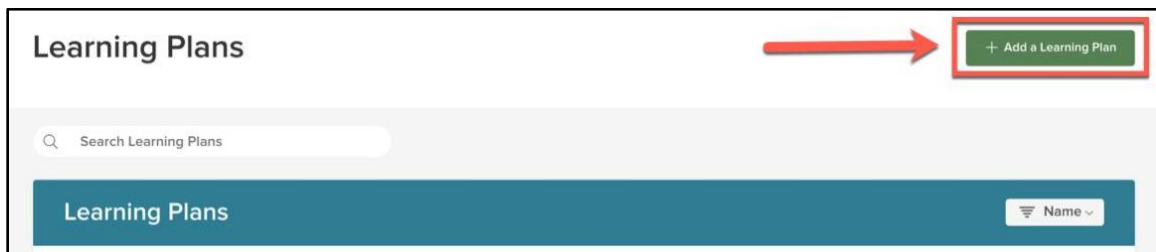From the Leaning Plan library, click **Add a Learning Plan**.

Figure 30: +Add a Learning Plan Button

This opens the Learning Plan Creation Wizard. To make this simple, we've narrowed the process down to two tabs: Learning Plan Details and Add Courses.

Within the Learning Plan Details, you can add some of the basic details about the Learning Plan. Fields marked with a red Asterix (*) are required.

Figure 31: Learning Plan Wizard - Tab 1

1. **Name***: The title of the Learning Plan
2. **Learning Plan Code***: An assortment of letters/numbers to associate with the Plan
3. **Description**: Brief details on the overview or purpose of the Learning Plan to let Learners quickly know what's going to be included
4. **Check for Learning Plan Course Associations in the Past***: Manage the enrollment of a course associated to a Learning Plan if the learner is already active/in progress in a course OR completed course at the time of the Learning Plan assignment
5. **Is Required**: Determine whether the Learning Plan is required for learners to take or not
6. **Relative Due Date***: Determine when the Learning Plan is required to be completed relative to the time a Learner is enrolled

Once you've added all the required details, select the **Add Courses** menu bar to move on to Step 2.

Figure 32: Learning Plan Wizard - Tab 2 > + Add Courses Button

A flyout displays, listing all published courses you can add to your Learning Plan. Select any and all courses to include within the Learning Plan. Use the header fields to search for courses by Course Name, Course Code, Delivery Method, Type, Number of Classes, or Duration. You can add any combination of courses (Classroom, Custom Online, Pre-Built Online) to your Learning Plan.
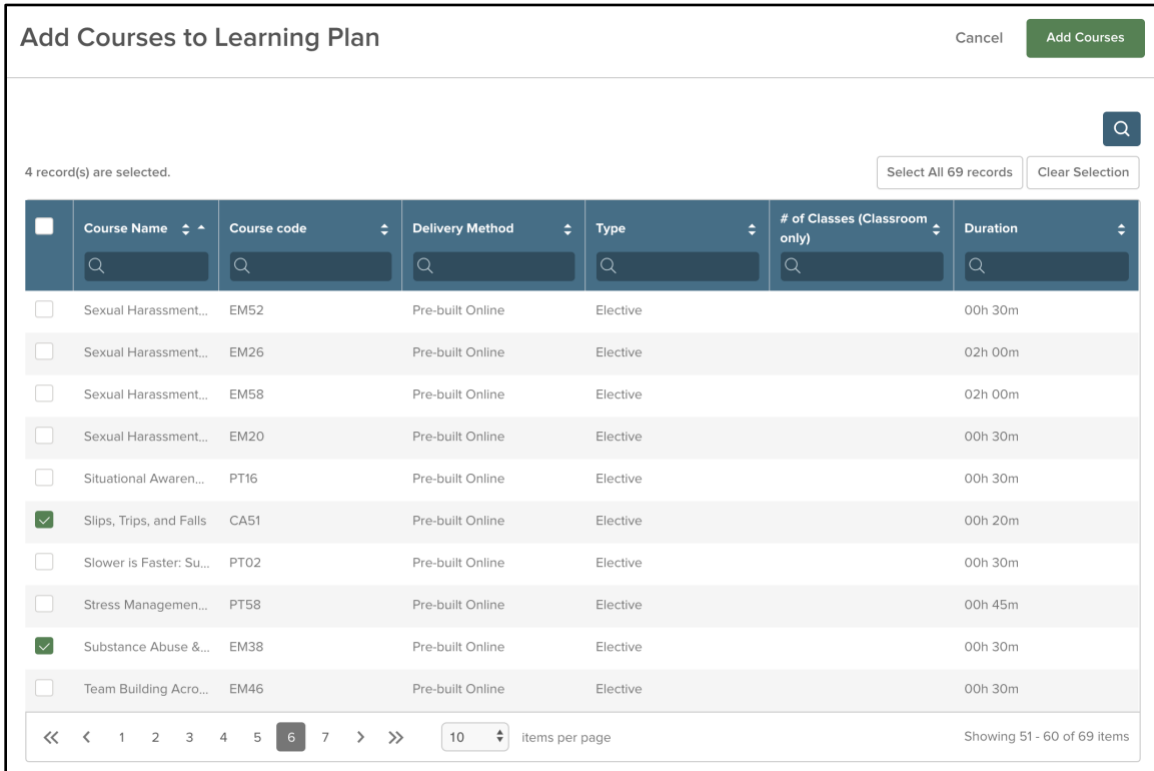

Figure 33: Add Courses to Learning Plan Flyout

Once you've picked all the courses to add, select the **Add Courses** button.
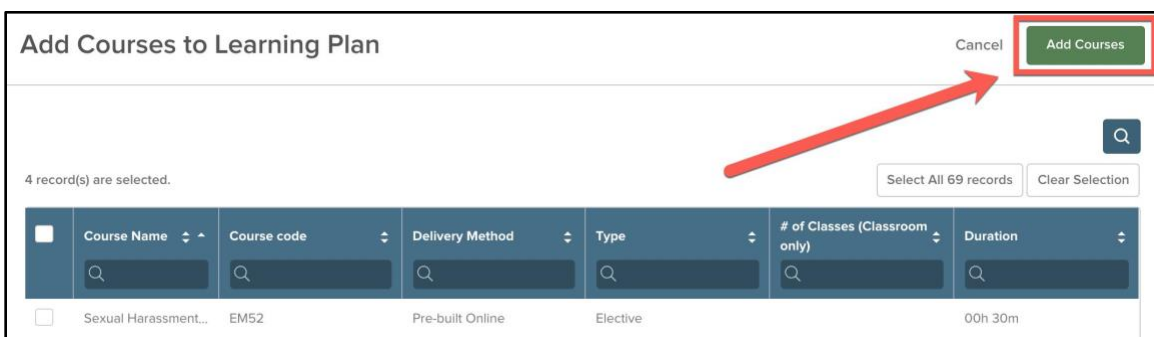
Figure 34: Add Courses Button

From here you're taken back to Step 2. Here you can review the courses you've added, delete any with the trash can icon, or add more courses. You can also return back to the Learning Plan Details tab to review or edit any of those details. Once you're satisfied with your changes, select **Save** in the upper right corner.

Figure 35: Learning Plan Wizard - Tab 2

Clicking Save takes you to the Detail page of the Learning Plan you just created. As you can see, all the details you configured within the Learning Plan Details are on display at the top of the page. Beneath are the courses included, and under that is your Learner List.

Figure 36: Learning Plan Details Page

To get started using your Learning Plan, click the **Publish** toggle in the upper right corner from OFF to ON.
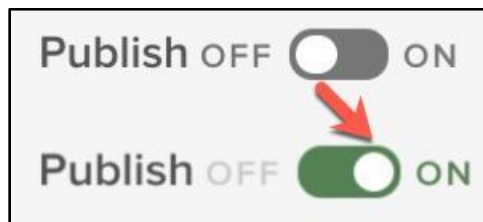

Figure 37: Publish Button

Registering Learners

Now that your Learning Plan has been created, you can add Learners. This process is very similar to enrolling a leaner in a course via the Course Catalog. To do so, move to the bottom of your Learning Plan Details page. When your Learning Plan has been published, a **Register Learners** button is available. Click Register Learners.
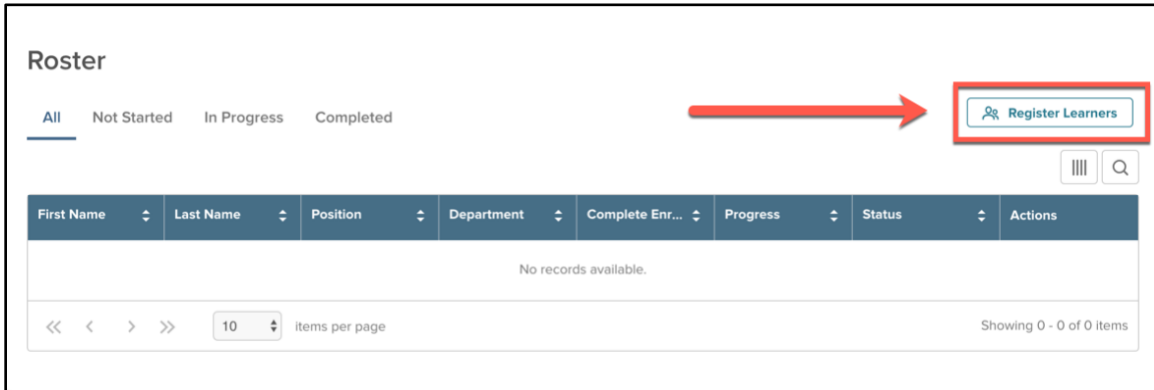

Figure 38: Register Learners Button

This causes a popup to appear. From here, select any and all learners you wish to assign this learning plan. When you're done, hit **Register Learners**.
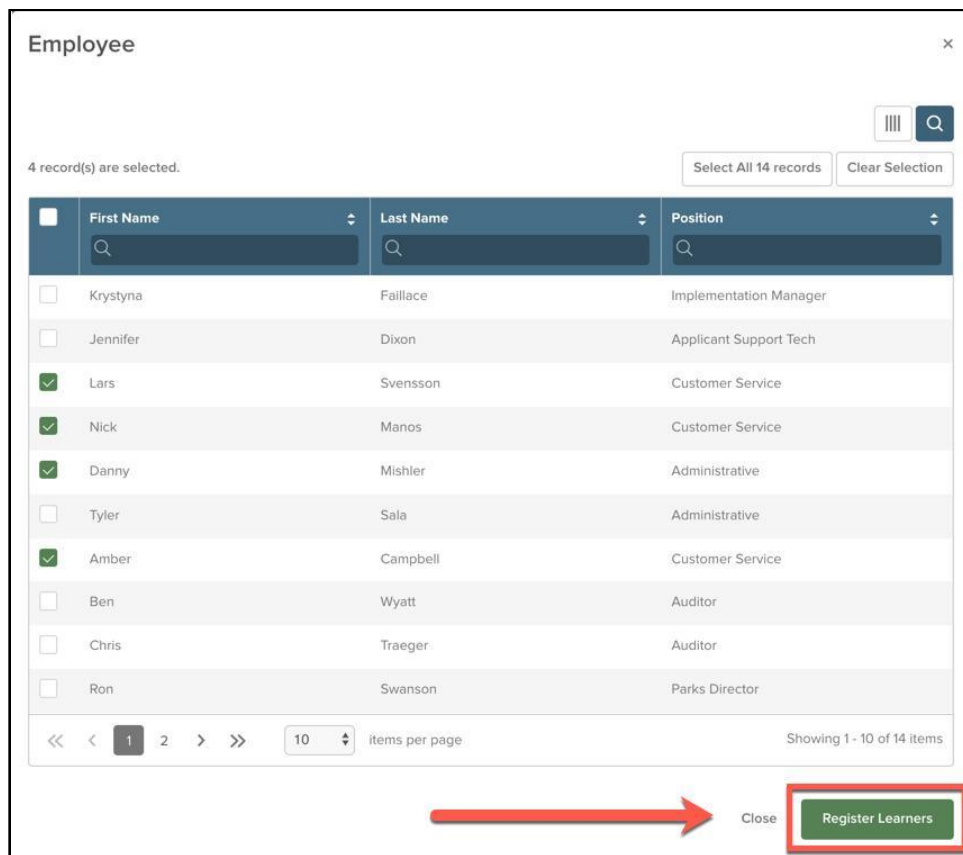

Figure 39: Employee List Popup

You're then given a Bulk Actions screen that shows the learners being added to the Learning Plan. When this process is complete the screen reads "Your Bulk Action is Done!" Your learners have now successfully been added to the Learning Plan! Click the **X** in the top right corner, or **Close** in the bottom right corner, to close the screen.

Figure 40: Add Employee Bulk Action

Unregistering Learners

Similar to dropping a learner from a course, Admins may need to unregister a learner from a Learning Plan. Unregistering a user drops them from all courses associated with the Learning Plan.

> **TIP!**
>
> If a learner was already enrolled in a class included in the Learning Plan, that enrollment stays intact upon un-registration from the Learning Plan, so the learner is not dropped from those courses

Unregistering a learner can be easily accomplished through the Actions column found on the far right of the Learner List on the Learning Plan.
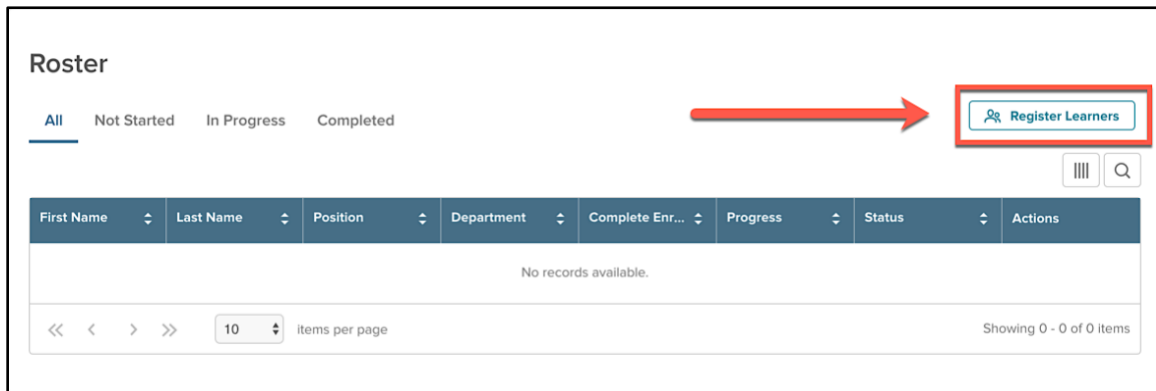
Figure 41: Learner List Action Column

To unregister a user, simply select the **Unregister** action item. This causes a popup message for the Admin to confirm the total number of courses in the Learning Plan to be unregistered from the learner. Select **Unregister Learner** to confirm your action.
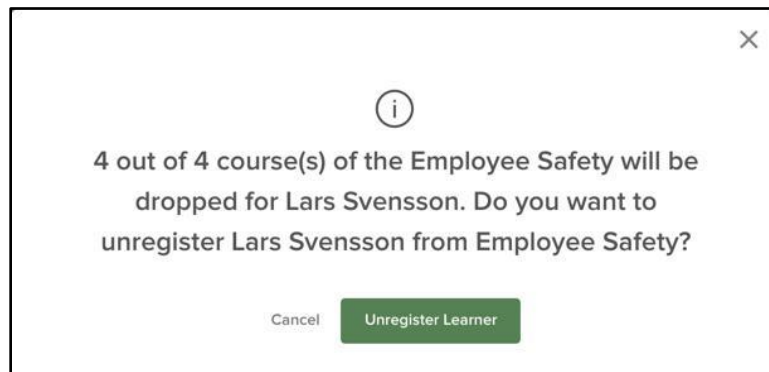

Figure 42: Unregister Learner Confirmation

You're then given a Bulk Actions screen that shows the Learner being added dropped from the Learning Plan. When this process is complete the screen reads "Your Bulk Action is Done!" Your learner has now successfully been dropped from the Learning Plan! Click the **X** in the top right corner, or **Close** in the bottom right corner, to close the screen.
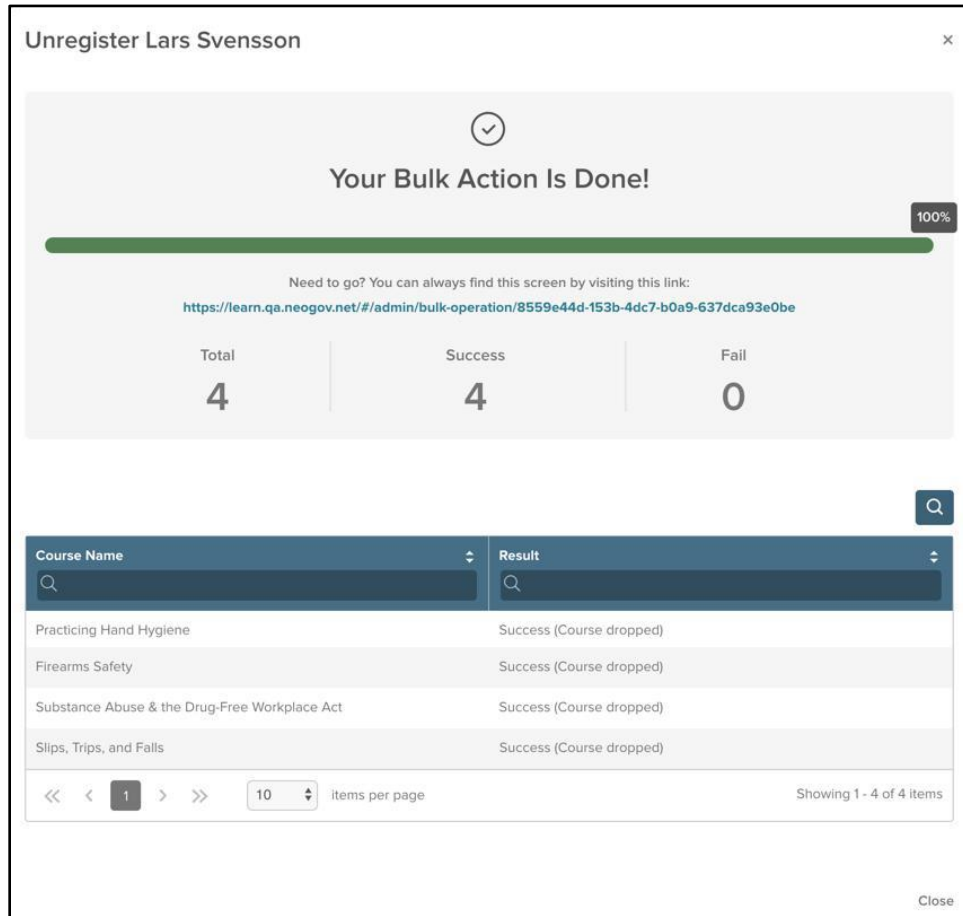
Figure 43: Unregister Learner Bulk Actions

If the learner you want to unregister from the Learning Plan has already registered for one of the courses from the list, they are not removed from that course. For peace of mind, you can see this confirmed in the Bulk Actions Confirmation under the **Result** text for the course.

Figure 44: Course Not Dropped Confirmation

When returned to the Learner List, you can now see the learner you unregistered has a **Cancelled** Status.

Figure 45: Learner List Status

Course Enrollments

With any Learner attached to a Learning Plan, Admins can track and manage their progress by drilling down in the Learner List. This allows Admins to determine if further action is needed, such as giving learner access to a course restricted by department.

This drilled down Employee Information can be accessed by clicking either **Yes** or **No** under the **Completed Enrollment** column for a specific Employee from the Learner List.

Figure 46: Learner List Complete Enrollment Column

Once you've selected a learner, the system displays their Learning Plan courses. From here, you can view if a learner has enrolled into a class session for a classroom course, if a learner is pending enrollment to a class due to a waitlist, or if a learner is pending approval for a course. This quick view easily allows the Admin to view the learner's status without having to navigate to their Profile.

Figure 47: Learner's Learning Plan Courses

Learner Profile

Once a Learner has been registered into a Learning Plan, they can view their assigned Learning from both their **Profile** and **My Courses** pages. Learners can begin their training directly from either location.

To find the Learning Plan from your profile, select your name in the top right corner, and then click **My Profile.**
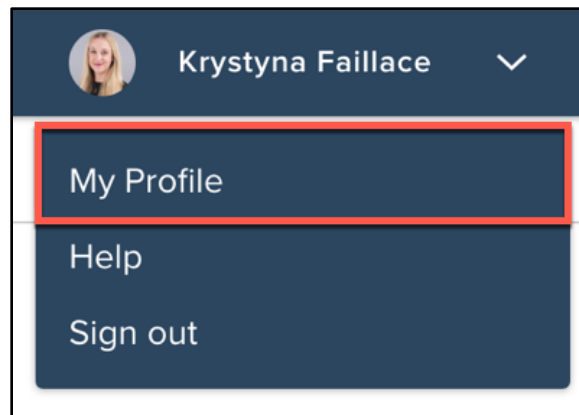

Figure 48: Your Name > My Profile

The system automatically loads your **Profile** tab. Select the **Learning Plans** tab to switch over. Then you can examine all of your Registered and Completed Learning Plans.
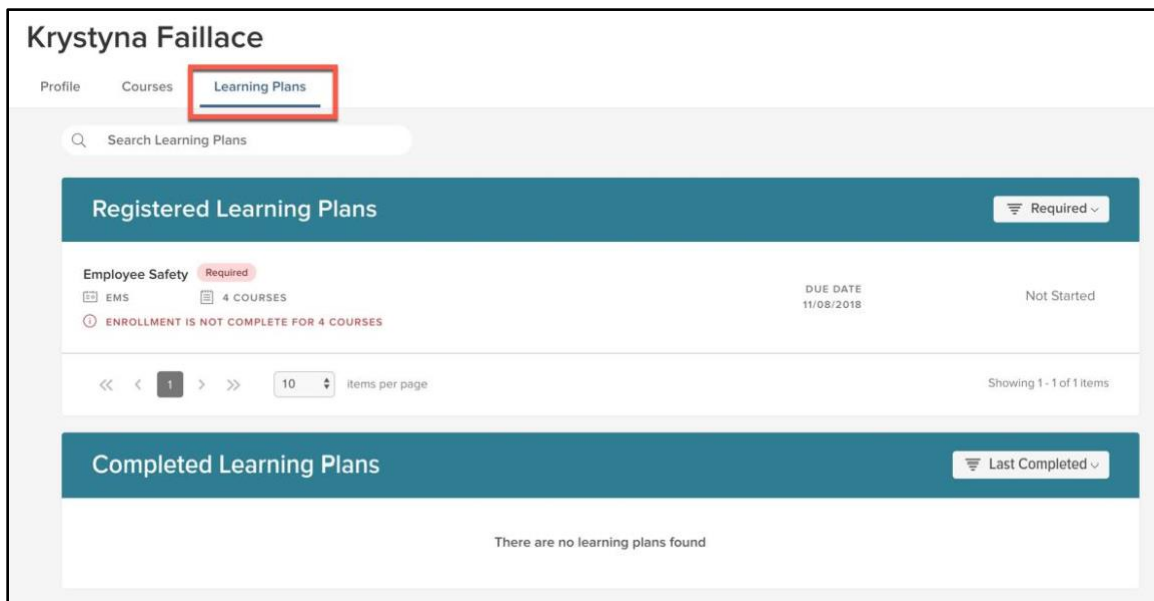

Figure 49: My Profile > Learning Plans

To find the Learning Plan from your courses, select the **My Courses** menu item along the top of the screen.
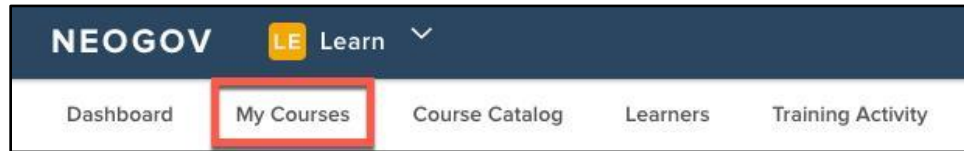
Figure 50: Menu > My Courses

Just like before, the system automatically loads the **Courses** tab. Simply select the **Learning Plans** tab to switch over. You'll notice that this view is exactly the same as from **My Profile**. This keeps our system consistent, so you can access up-to-date and correct Learning Plans in whichever location is most convenient for you.
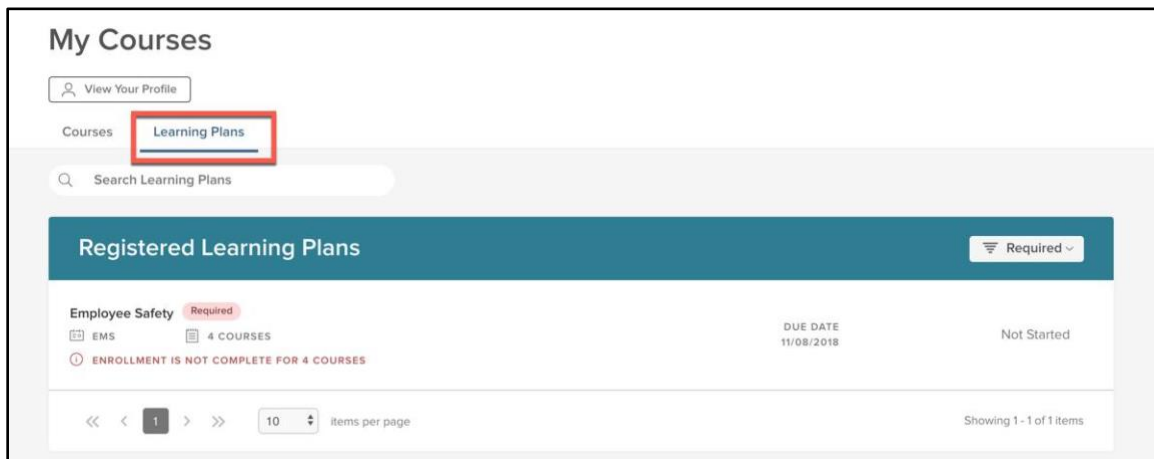
Figure 51: My Courses > Learning Plans

For Classroom Courses that are part of a Learning Plan, learners are not automatically enrolled into a class. This allows each individual learner to select a class session that best fits their schedule (or be enrolled by an administrator).

Detail Page

Click the title of any Learning Plan to learn more about it. This action takes you to the **Learning Plan Details** page. This section gives a learner or administrator a view of what is involved in a Learning Plan so they can either take actions to complete the Learning Plan or know if it's appropriate to enroll another Learner in.

Figure 52: Learning Plan Detail Page

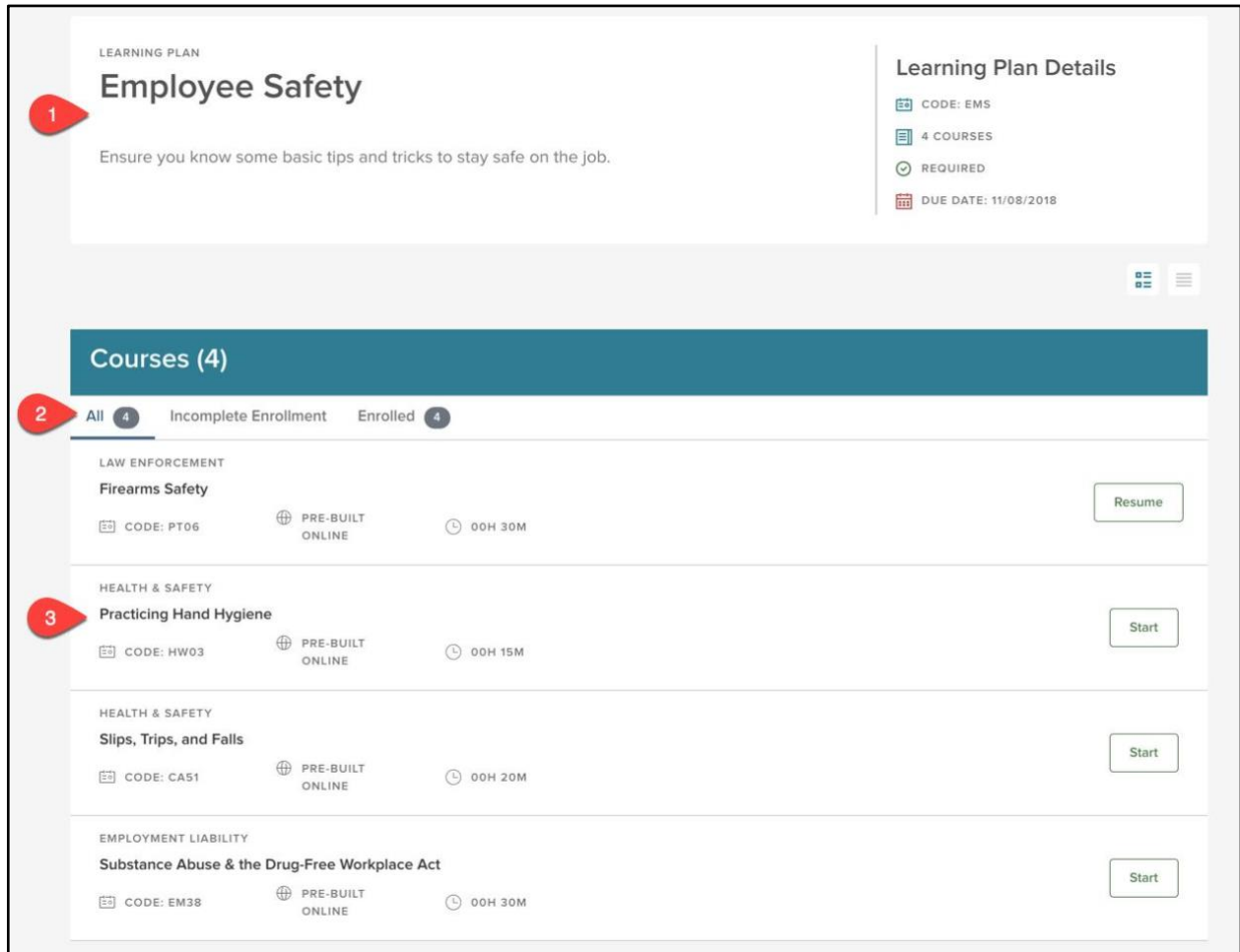1. **Learning Plan Details**: The basic details of the Learning Plan, including Title, Description, Code, Number of Courses, Required Check, and Due Date
2. **Courses Tabs**: A way to filter the view of the Learning Plan between all courses, incomplete enrollment, and enrolled
3. **Course Details**: Details specific to each course, including the title, code, type of course, course length, and ability to start or resume the course

Learning Plan Activity Report

In addition to the Training Activity Report for courses, learners are also able to run progress reports on Learning Plans via the **Learning Plans Activity Report**. To access the Activity Report, select **Training Activity** from the main menu bar.
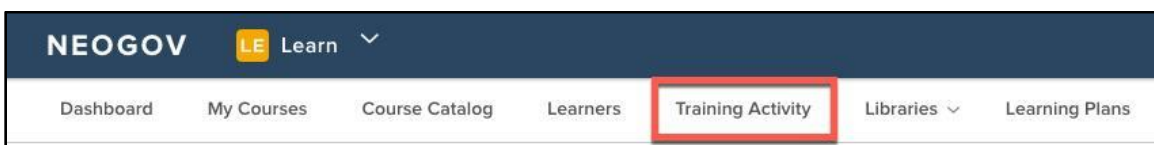

Figure 53: Menu > Training Activity

The system automatically loads the Training Activity for **Courses** first, so simply click the tab for **Learning Plans** to switch over.
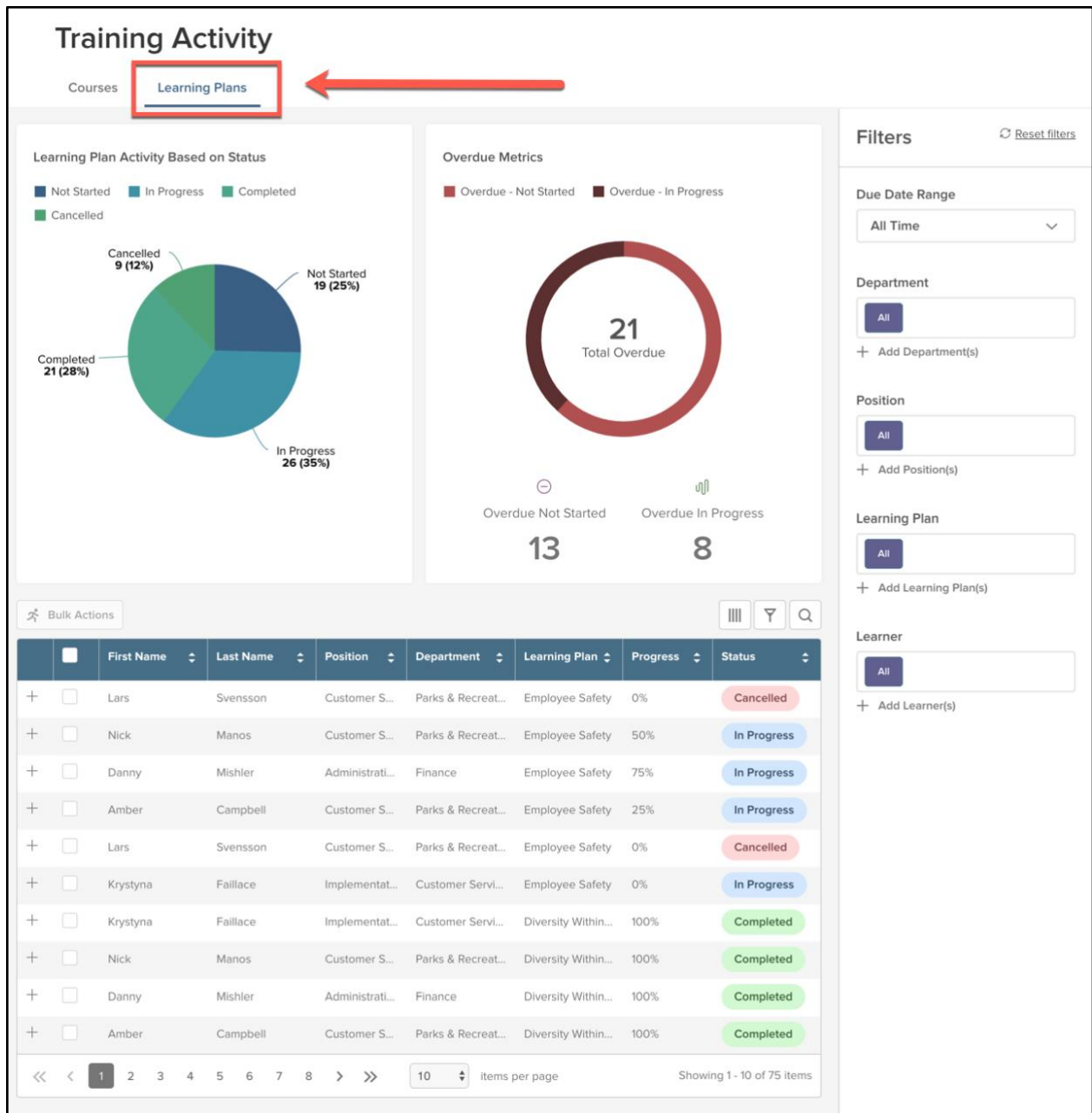

Figure 54: Training Activity > Learning Plans Tab

The **Learning Plan Training Activity** is organized into three simple sections to make information easily consumable.

The first section at the top of the page contains all the graphic information. On the left is a pie chart for **Learning Plan Activity Based on Status**, and on the right is a circle graph for overdue Learning Plans. You can click in to any of these items to alter the information presented below. This allows you to drill down into the specifics for any activity status associated with a Learning Plan.

Additional filters are available on the right hand of the screen. This is particularly helpful when you want to examine the activity for Learning Plans based on a particular Department, Position, Learning Plan, or Learner.

Below the graphics is the itemized list of all Learners involved in a Learning Plan. In addition to the sorting ability the graph allows, you can see even more detail about a particular learner's Learning Plan Activity by clicking the plus icon (**+**) next to the Learner's name.

Figure 55: Learner Training Report Details

Any of these records can also be exported as a PDF, CSV, or Excel file. Simply select any combination of learner records using the checkmark boxes, and then click *Bulk Actions*.

Figure 56: Select Learning Plan Learners > Bulk Actions

A flyout appears with the various export options available.

Figure 57: Bulk Actions > Export

Learner Transcript

Learners can also view their Learning Plan progress via their Learner Transcript. This is accessed the same way regular transcripts are. Head to the learner's profile and select *View Transcripts.*
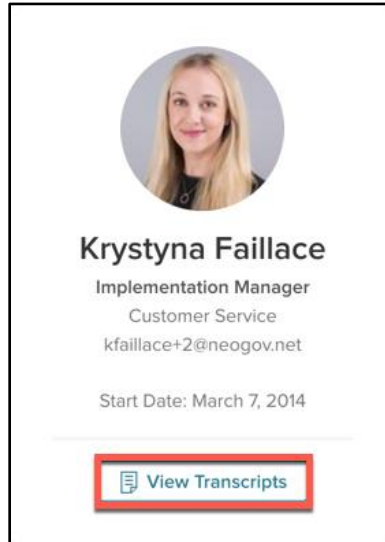
Figure 58: Learner Profile > View Transcripts

When the learner's transcripts load, you'll notice the Learning Plans are displayed at the bottom of the page. Here you can easily see all the Learning Plans a single learner is involved in and use filters to drill down into their progress.

Figure 59: Learner Transcripts - Learning Plans

Certifications and Licenses

Overview

Learn allows users to track professional certifications and licenses, which ensures the competence of employees by measuring the skills and knowledge needed for their positions. With this feature, the process of tracking certifications and licenses is automated for your organization by centralizing documentation using one system of record.

Certifications and Licenses Tracking all provides greater transparency by allowing HR, Managers, and Employees to receive system notifications when recertification is nearing or if a certification or license has expiration. To learn how to set up these notifications, please see Learn Series A: Administrative Setup.

Additionally, Admins have the ability to run reports to ensure employees records are up to date and Employees are able to easily showcase their professional achievements directly from their Learner Profile.

Who Should Use This Section

HR Administrators and Managers should use this section to learn how to create and manage Certifications and Licenses. Employees should use this section to learn how to track their own Certifications and Licenses.

Tracking Certifications/Licenses

Before learners can add Certifications/Licenses to their profiles, HR Admins have to add them to the Library. To access Certifications/Licenses, select **Libraries** and then **Certifications/Licenses** from the main menu bar.
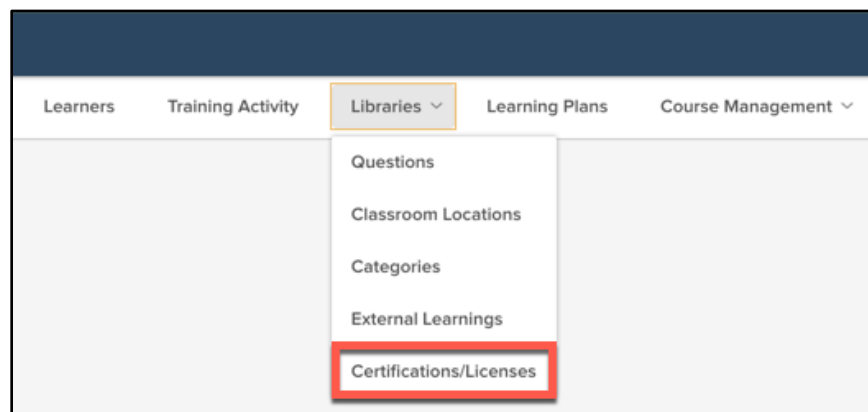
Figure 60: Libraries > Certifications/Licenses

Here Admins can manage certifications and licenses for your organization. All current Certifications and Licenses are listed below.
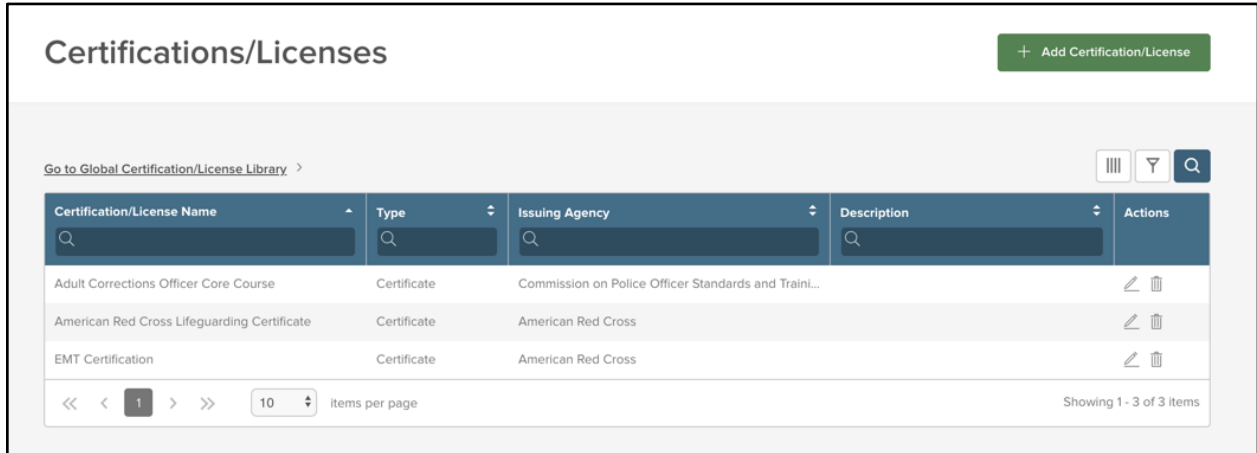
Figure 61: Certifications/Licenses View

From here, there are two methods to adding a new Certification and/or Licenses to your library: through the **Global Library** or by **Creating a Certification/License** from scratch.

Global Library

NEOGOV has provided a **Global Certification/License Library** feature for you to access a global library of Certifications and Licenses obtained for professionals in the public sector. This makes it easier for you to select from a pre-populated list of common certificates and licenses without having to manually create them for your agency.

Select **Go to Global Certification/License Library** to view the Global Library.

Figure 62: Go to Global Certification/License Library Link

Here you are presented with an import list of all available Certificates not currently enabled in your system.

Figure 63: Import Global Certification/License

1. **Certification/License Table**: A list of all available Certifications/Licenses
   a. You can organize the list by selecting the header of the column you wish to sort by
2. **Options**: Use these to sort the list
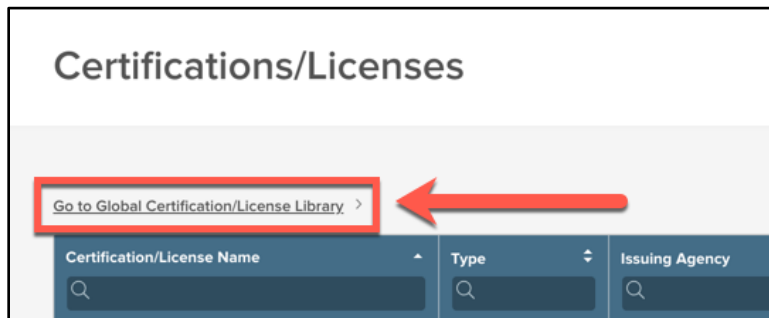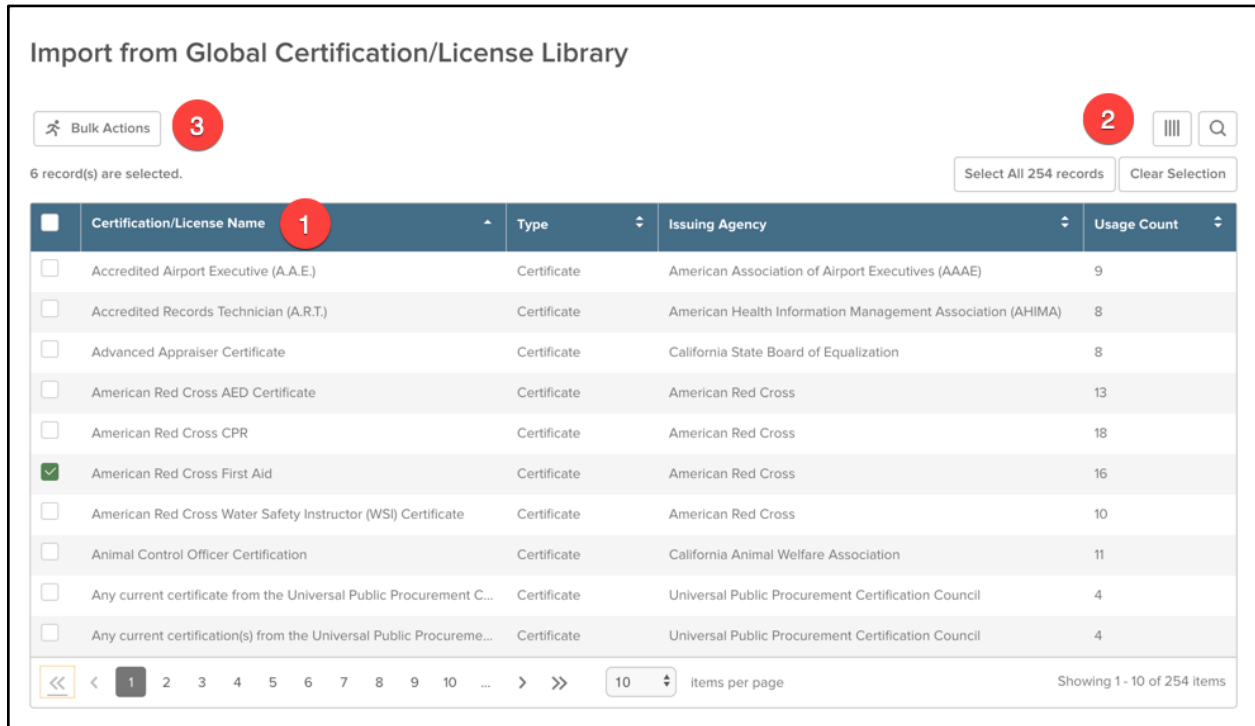   a. *Columns*: Modify the Columns available in the view
      i. Options include: Certification/License Name, Type, issuing Agency, Usage Count, and Description
      ii. The *Usage* column allows you to see how many other Learn users are also tracking that Certification/License in their agency
   b. *Search*: Click to enable to search bar within each column
   c. *Select/Clear Records*: When you've selected a record, use these to either select all available records, or remove all current selections
3. **Bulk Actions**: Click this after you have selected the Certifications/Licenses you want to import into your system
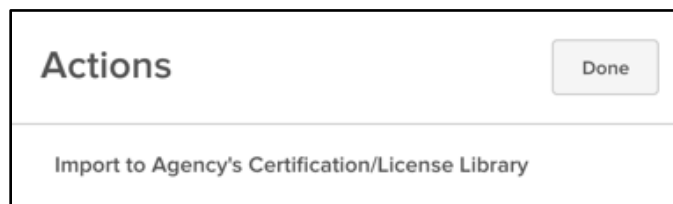

Figure 64: Bulk Actions > Import

Add Certification/License

If you cannot find a Certification or License in the Global Library, you have the ability to create one yourself from scratch. From the **Certification/License Library**, select **Add Certification/License**.
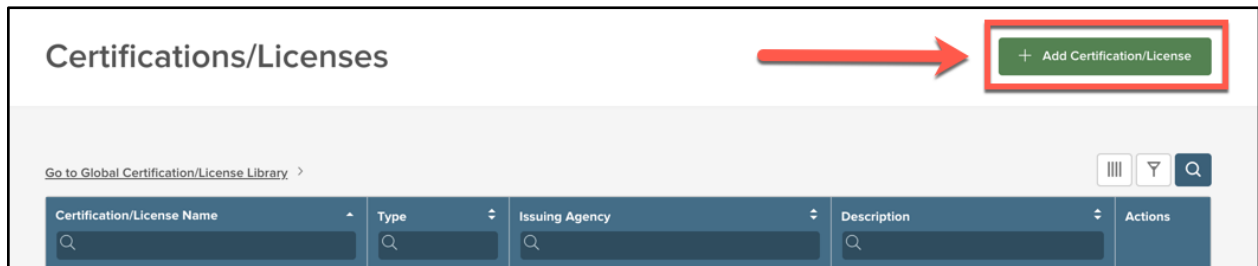
Figure 65: Add Certification/License Button

This causes a flyout to appear where you can add all the information required to add a Certification to the library.

Figure 66: Add New Certification/License Flyout

1. **Certificate/License Name***: The title of the Certificate/License
2. **Type***: Select whether the new item is a Certificate or a License
3. **Issuing Agency***: Enter the name of the Agency the Certificate/License is from
4. **Description**: Details about the Certificate/License (Optional)

Managing Certification/Licenses

Once you've added all the Certificates and Licenses needed to your Library, it's time to start managing them. By default, all users, including Learners, can add Certificates/Licenses to a Learner Profile they have access too.

Managing via the Learner Profile

On a Learner's Profile, there is a Certifications/Licenses section that displays a snapshot of these achievements. At a glance, HR Admins, Managers, and Learners can view the expiration status for a Certification or License to identify if it is current, expired, or if there is no expiration available.

You can access a Learner's profile by selecting their name from the Learner's List. You can access your own by selecting **My Profile** under your name in the right-hand corner of the screen. Once on a Learner's profile, you can see the Certifications/Licenses on the left-hand side, just under their personal information, on the Profile tab.

This section allows you to see up to five certifications/licenses. Once five have been added, a "View All Certifications/Licenses" button appears, which takes you to the Certifications/Licenses tab of the Learner Profile.

Figure 67: Learner Profile > Certifications/Licenses

Additionally, there is a Certifications/Licenses tab where you can view all this information in more detail.

Figure 68: Certifications/Licenses Profile Tab

1. **Certification/License Details**: Lists details about the Certificate, including the name, license number, who it was issued by, available attachments, the issue date, and the expiration date (if applicable)
2. **Edit/Delete**: Use to edit or delete the Certification/License
   a. Note: Certifications/Licenses associated with External Learnings must first be disassociated from the External Learning before they can be deleted
3. **Add Certification/License**: Click to add another Certification/License to this learner's profile
   a. This causes a flyout to appear where you can add a Certification/License

Figure 69: Learner Profile > Add Certification/License Flyout

1. **Certification/License***: Select a Certification or License that has been added to your agency's Certifications/Licenses Library or add a new one on the fly
2. **Type**: Whether the item is a Certification or a License; auto-populated by the above selection
3. **Issuing Agency**: Who issued the Certificate/License; auto-populated by the above section
4. **Date Issued**: Enter the day the Certificate/License was earned (if applicable)
5. **Expiration Date**: Enter the day the Certificate/License expires (if applicable)
6. **Certification/License Number**: Enter the Certificate/License Number (if applicable)
7. **Course Attachments**: Upload a supplemental file, such as a Certificate of Completion
8. **Associate Certification/License to External Learning**: Select if an attended External Learning events, such as a seminar or conference, is associated with obtaining this Certification/License or part of re-certification
9. **Reminder Settings**: Set Reminder and Overdue settings for the learner to receive system notification alerts when the Certificate/License is close to expiring or has expired

Managing via the Learner Transcript

Learners can also view and print their Certificates/Licenses directly from their transcript. You can locate a learner's transcripts from their Learner Profile by selecting the **View Transcript** button.
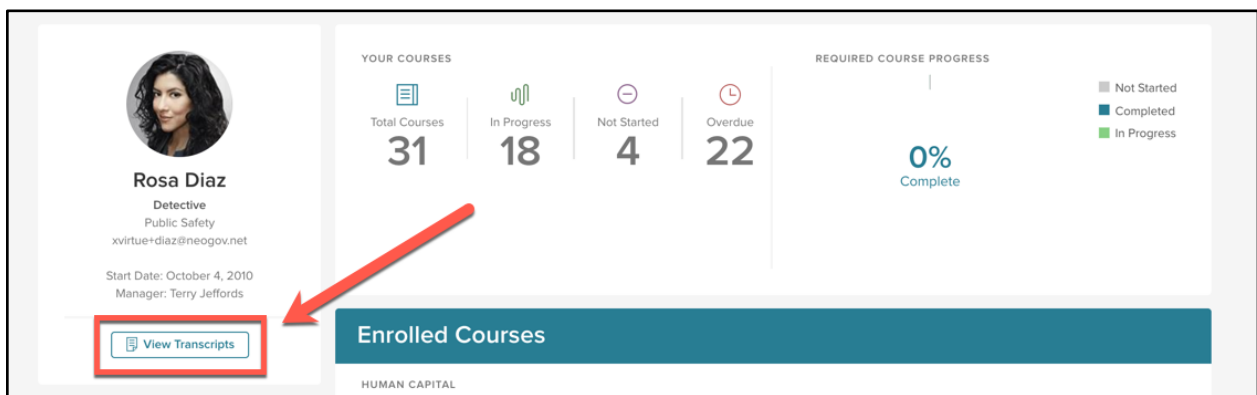
Figure 70: Learner Profile > View Transcripts Button

At the bottom of this page is a list of all the learner's Certifications/Licenses.

Figure 71: Learner Transcript > Certifications/Licenses

Additionally, you can print the record of these Certifications/Licenses by selecting only the **Print Certifications/Licenses** from the **Print Transcript** button dropdown at the top of the page.
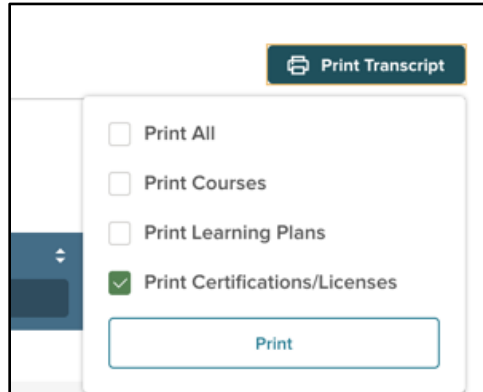
Figure 72: Print Transcript > Print Certifications/Licenses

Certification/License Report

In addition to being able to print transcripts, Admins are also able to run reports on Certifications/Licenses. This is helpful to quickly identify employees whose certification/licenses are current or have already expired.

To access the Report, select **Certification/License** from the Reports dropdown.
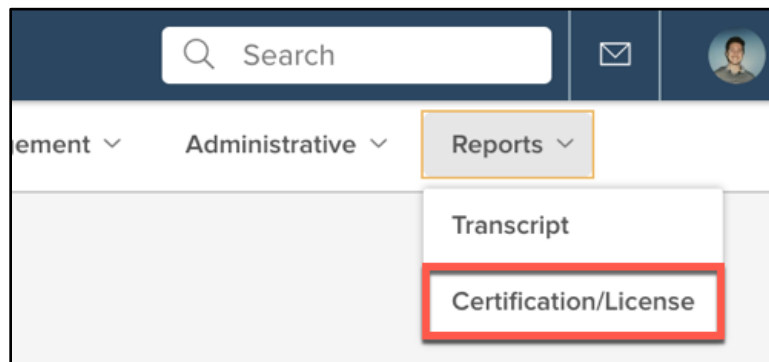
Figure 73: Reports > Certification/License

The resulting page shows a list of all Certifications/Licenses earned for all Learners you have access to.

Figure 74: Certification/License Tracking Report

1. **List View**: A list of all available Certifications/Licenses (according to the filters set)
   a. You can organize the list by selecting the header of the column you wish to sort by
2. **Options**: Use these to sort the list
   a. *Columns*: Modify the Columns available in the view
      ▪ Default Selected Options Include: First Name, Last Name, Employee Number, Certification/License Name, Certification/License Type, Issuing Agency, Issued Date, Expired Date, Status, Position, and Department
      ▪ Additional Options Include: Supervisor Name, Email Address, Active, Position Code, Department Code, Division, Division Code, Class Spec, Class Spec Code, Hire Date, and Expired
   b. *Search*: Click to enable to search bar within each column
   c. *Select/Clear Records*: When you've selected a record, use these to either select all available records, or remove all current selections
3. **Scroll Bar**: When there are too many columns enabled for a single view, use the scroll to view more columns on the page
   a. Use the available pagination to the right to display more results
4. **Bulk Actions**: Click this after you have selected the Certifications/Licenses you want to export into a Report
   a. Exported File Options include PDF, CSV, and Excel

There are also various filters available on the right-hand side of the screen you can use to modify the report to exactly what you need.

Figure 75: Tracking Report Filters

1. **Expiration Date Range**: Select a time range for which the Certification/License expires
   a. Options include: All Time, Already Expired, Expires in 30 Days, Expires in 60 Days, Expires in 90 Days, Expires in 1 Year, No Expiration, and Custom
   b. Selecting a Custom Date Range allows you to enter a start and end date
2. **Department**: Select the Department(s) to show
3. **Position**: Select the Position(s) to show
4. **Certification/License**: Select the Certification(s)/License(s) to show
5. **Learner**: Select the Learner(s) to show

TIP!

You can select up to five (5) options for each filter

Filters work in a top > down method, meaning that whatever items put into filters at the top affect the availability of what shows up in the filters below.

Connection with Onboard

Overview

The Learn (LE) application connects directly with the Onboard (ON) application. Using this connection not only saves you in time assigning new hire trainings but also creates a more seamless user experience.

In this section, we walk you through how Learn connects directly with Onboard, making it even easier to assign necessary trainings to your new hires. Stay compliant by making sure employees take appropriate organization-wide courses, while also helping them succeed in their new role with job-specific trainings.

Who Should Use This Section

This section is intended for HR Admins and any ON Checklist Administrators. HR Admins have access to enable the connection for their ON account. HR Admins and ON Checklist Administrators have access to assign trainings to Onboarding checklists, which is covered in detail in this guide.

Note, NEOGOV must enable the Learn (LE) environment before you can use the ON connection detailed in this section. NEOGOV must also enable the connection. Contact your Implementation Consultant if your environment and/or connection has not yet been activated.

Enabling Onboard Connection

Once the connection has been turned on by NEOGOV, HR Admins can enable the connection with Learn via the Administrative dropdown in Onboard.

From the Administrative dropdown, access your Onboard settings.
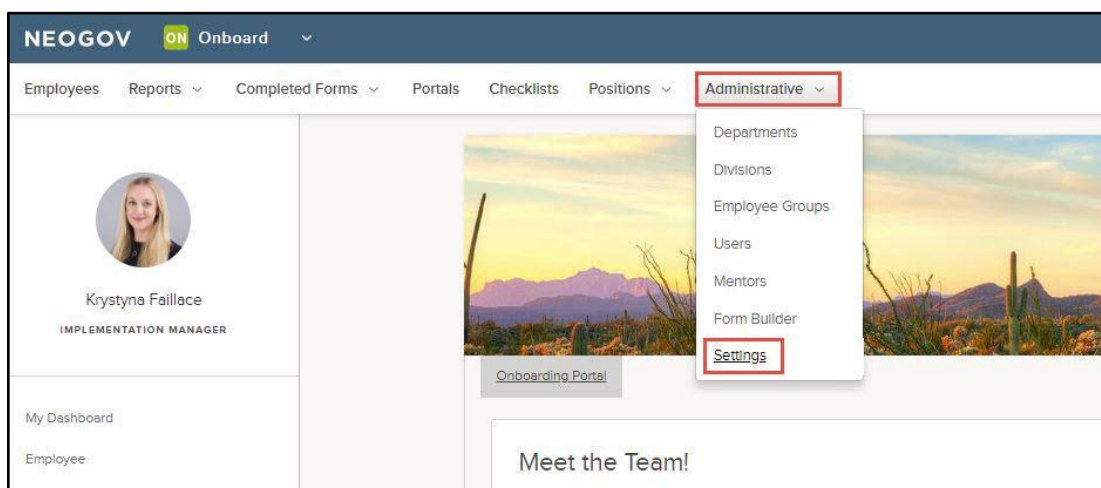
Figure 76: ON Administrative > Settings

Once the LE connection has been enabled by NEOGOV, an LMS Integration option appears on the left-hand side, click on the title and enable the LMS Integration.
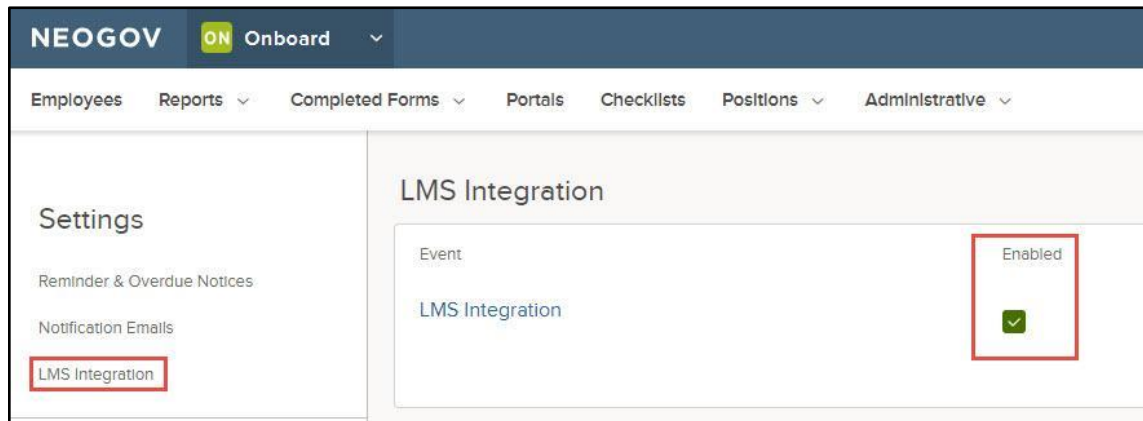
Figure 77: Enable LMS Integration

Assign Checklists

Now that the LE connection has been fully enabled, you can start assigning trainings to your Onboarding checklists. Access your checklists via the Checklists dropdown.
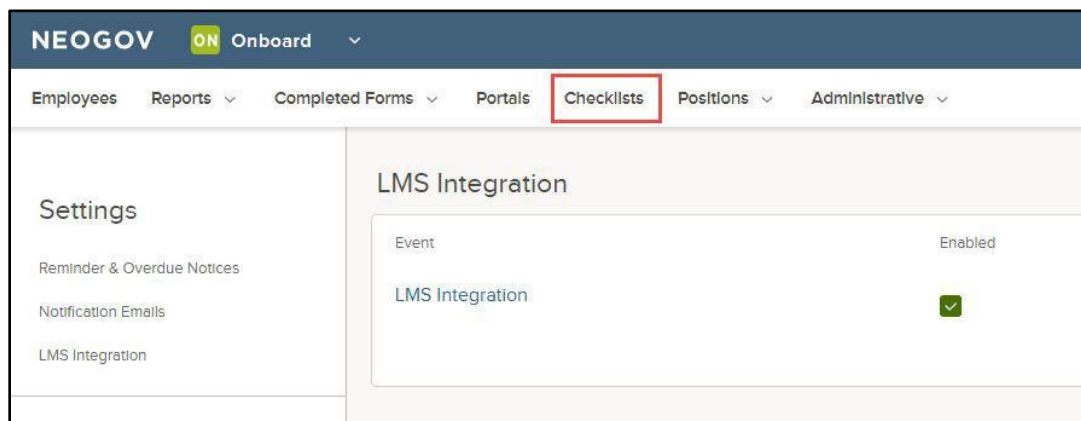
Figure 78: Checklists Header

TIP!

Please note you are only able to assign trainings to
Onboarding Checklists, not Offboarding Checklists

You can add a new checklist or edit an existing checklist. In the following example, we edit the Standard Form Tasks checklist to add training that all new hires must take.

First, select the pencil icon in the Actions column to edit the checklist.
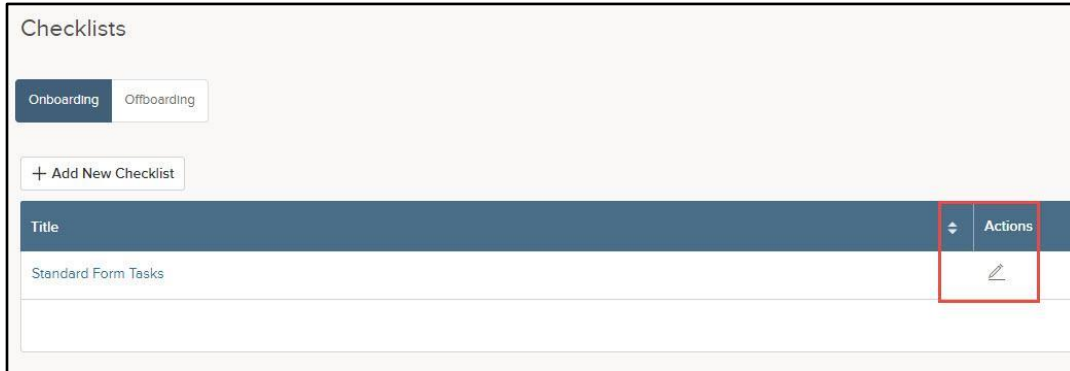
Figure 79: Checklist Action Icon

Once in edit mode for the checklist, select the Checklist Items tab.
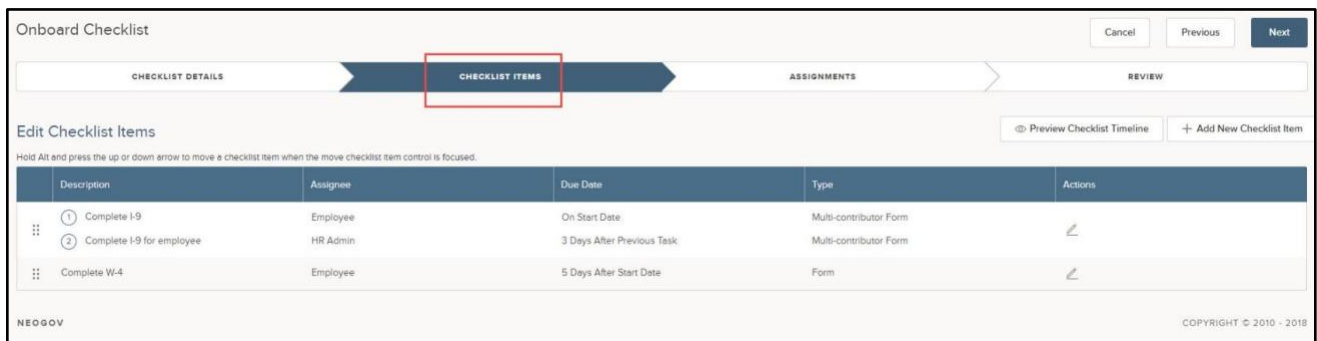
Figure 80: Checklist Items Tab

From the Checklist Items tab, select "+ Add New Checklist Item" and then 'Assign Training".
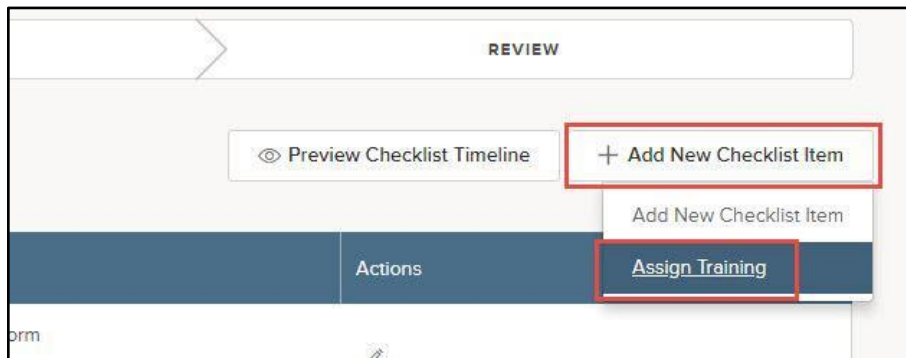
Figure 81: Add New Checklist Item > Assign Training

TIP!

On the Assign Training page, under the Add Training tab, assign any necessary
online trainings. Please note that only online trainings can be assigned to ON
checklists via this integration; classroom trainings cannot be assigned here

Here, you see all online courses available to you. You can search courses by category and see the number of courses in each category as well. You can also select multiple online courses if necessary.
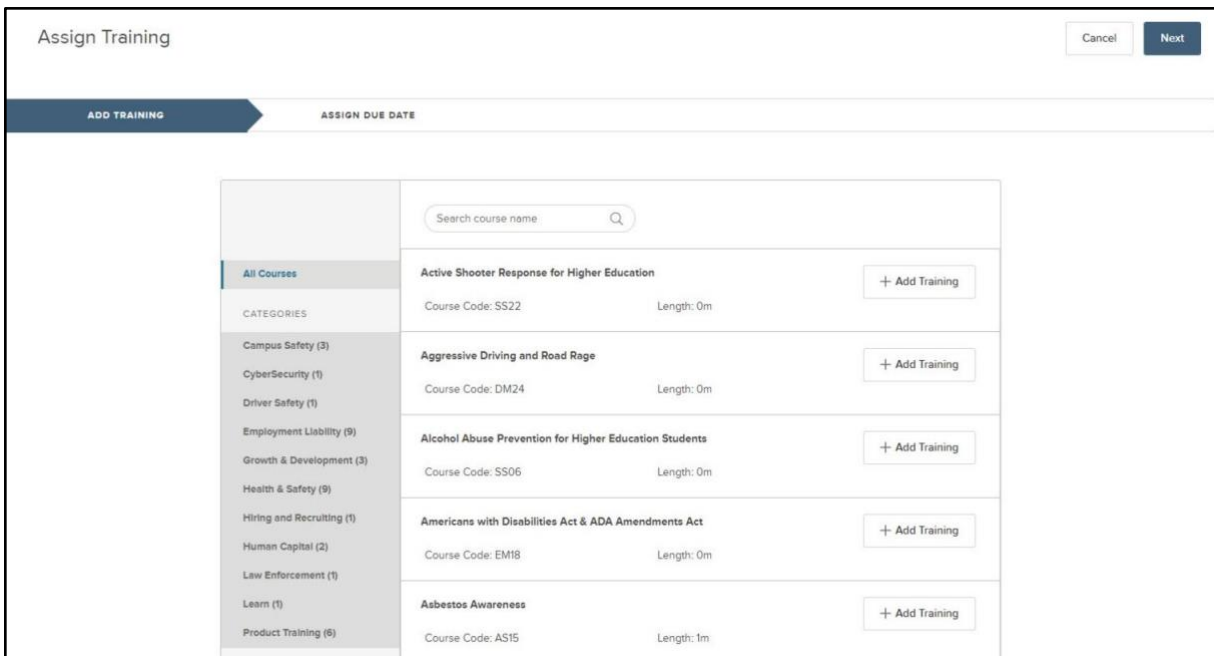
Figure 82: Assign Training View

One the course(s) are located, select the "+ Add Training" icon to add the course(s) to the checklist.
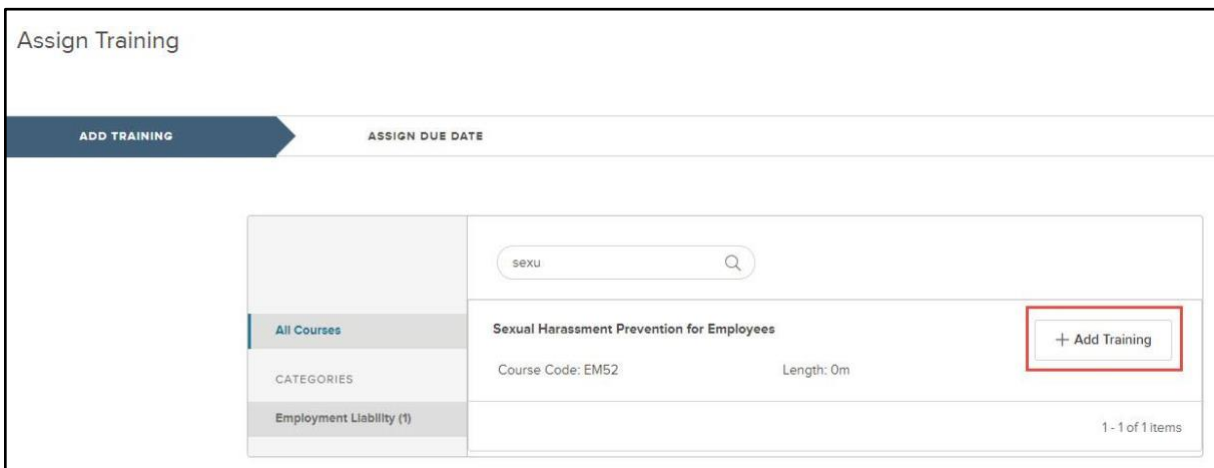
Figure 83: Assign Training > +Add Training Button

In this example, the Sexual Harassment Prevention course that all new hires are required to take is selected. A Training Added message appears once the training has been successfully added. Adding this required course to the standard Onboarding checklist not only saves time, but it helps you stay compliant.
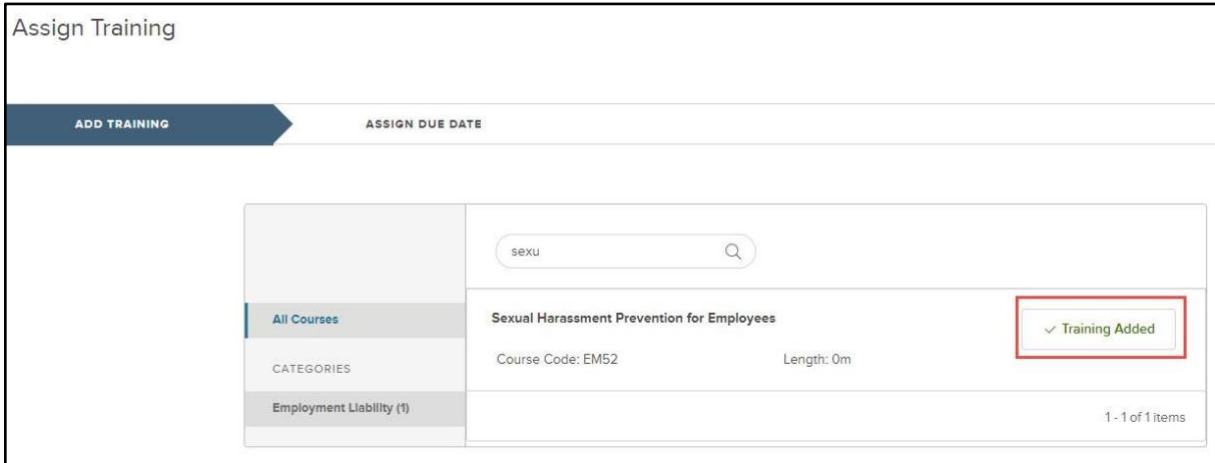
Figure 84: Training Added Confirmation

Next, click on the Assign Due Date tab to assign a due date for the training added. You can select a due date similar to the due date selection of other checklist item types, which is based on start date. If multiple courses are assigned, you can select a specific due date for each course. Put in a numerical value in the first field, followed by the selection of Days, Weeks, or Months After Start Date.
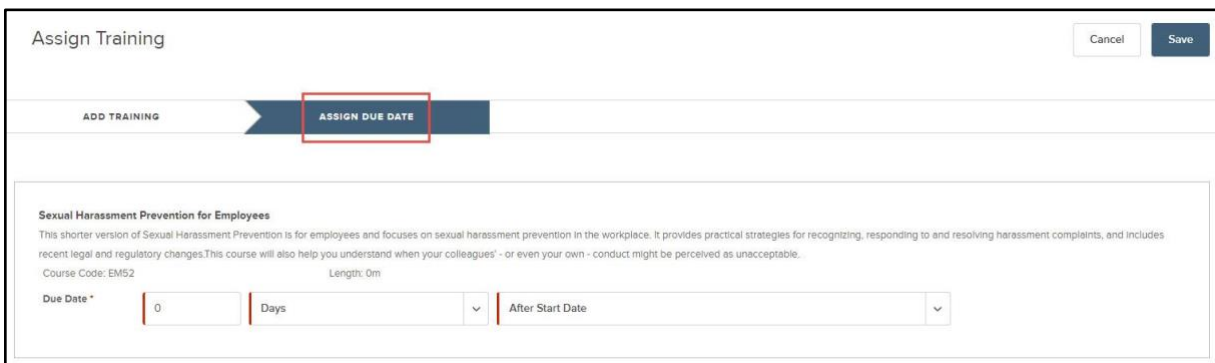
Figure 85: Assign Due Date

Select Save once you are finished.

TIP!

If there are enrollment approvals required on the course, the task remains pending until those approvals take place. Once any necessary approvals are complete, the task becomes current and is ready for the employee

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Now that the training has been successfully added to the checklist, let's look at a new employee who has this checklist assigned.

From Onboard, view an employee who has the checklist assigned. Navigate to Employees and click on the employee name to access their Employee Details page. View their Onboarding portal and reference their Checklist.
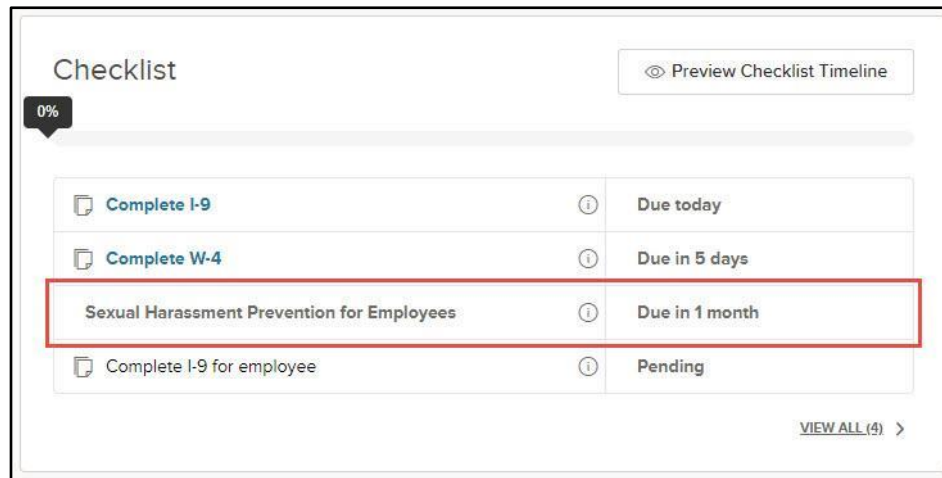
Figure 86: Training Added to Checklist

Here, you can see the Sexual Harassment Prevention training has been added to the new hire's checklist. The employee is able to launch the course directly from their Onboarding portal by simply clicking on the course name.

Once the employee completes the course, the task status reflects appropriately in Onboard. Manual editing of training tasks is not permitted; therefore, the employee needs to complete the training for the task to reflect as complete in Onboard.

In addition to required new hire training, department or job-specific training can also be added to other checklists in Onboard. For example, maybe all of your Police positions need to take a Defensive Driving course; that can be added to a checklist specific to their position. This allows your new hires to get up to speed quickly, fully immersing them in their new role.

Administrators utilizing the custom online course builder in Learn may also create specialized content, such as how to use functionality in Insight or OHC and assign these trainings directly to any checklists for new recruiters or hiring managers in your organization.

Connection with Perform

Overview

The Learn (LE) application connects directly with the Perform (PE) application. Using this connection allows your Managers to seamlessly review training history and assign new trainings directly from an evaluation within Perform.

In this guide, we walk through how Learn connects directly with Perform, making it even easier to assign necessary trainings to your employees. Ensure growth and development is a part of your evaluation process by allowing your managers to seamlessly review training history or assign trainings directly from evaluations.

Who Should Use This Section

This section is intended for HR Admins in LE and PE. Certain parts can be referenced by Managers for more information on how to use the connection within evaluations.

Note, NEOGOV must enable the Learn (LE) environment before you can use the PE connection detailed in this section. NEOGOV must also enable the connection. Contact your Implementation Consultant if your environment and/or connection has not yet been activated.

Enabling the Perform Connection

Once the connection has been turned on by NEOGOV, HR Admins can enable the connection with Learn via the Administrative dropdown in Perform.

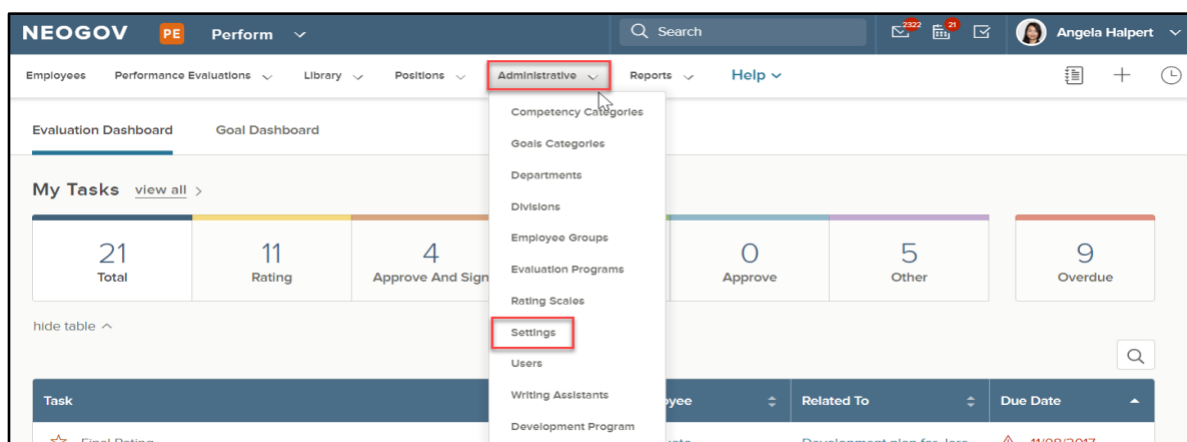From the **Administrative** dropdown, select **Settings**.

Figure 87: PE Administrative > Settings

Within the Administrative Settings page, scroll down to the **Evaluation Settings** section. The connection between Learn and Perform can be enabled by setting the **Enable Training Section** setting to **Yes**.

Figure 88: Evaluation Settings

1. **Evaluation Settings:** Access the Evaluation Settings section
2. **Enable Training Section:** Select **Yes** to enable the connection between Learn and Perform
3. **Save Changes:** Be sure to save changes to ensure the connection is enabled

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TIP!

Once this setting has been enabled, any Raters of Record within Perform begin seeing the connection points with Learn immediately in the rating form.

Rating Form

As previously mentioned, as soon as the Training Section setting is enabled by your HR Admin, your weighted raters can see changes within the Rating Form.

From the Perform Dashboard, access a current Rating task.

Anytime a Manager accesses a rating task, a Training Section appears within the Rating form. This is a huge help to raters who want to incorporate trainings as a part of the evaluation process to help aid in the development of the employee.

Figure 89: Rating Form Training Section

The Training Section appears on all Rating Forms for weighted raters, even on any existing evaluations.

NOTE: The Training Section cannot be configured in Evaluation Programs and is not visible on printed evaluations or within the Approval form.

View Training Activity

Before we review how to add trainings to the Evaluation, let's see how easy it is for the Rater(s) of Record to view the Training History for the employee being evaluated.

For example, let's access the Team Work competency. For customers who have multiple NEOGOV products, an aspect of Team Work could be ensuring everyone has a basic understanding of how to use NEOGOV products, which allows everyone to do their jobs more effectively and efficiently, creating a happier team environment.

With this in mind, while rating Team Work, I might be curious as to whether or not the employee has completed their NEOGOV product trainings that were previously assigned to them in Learn.
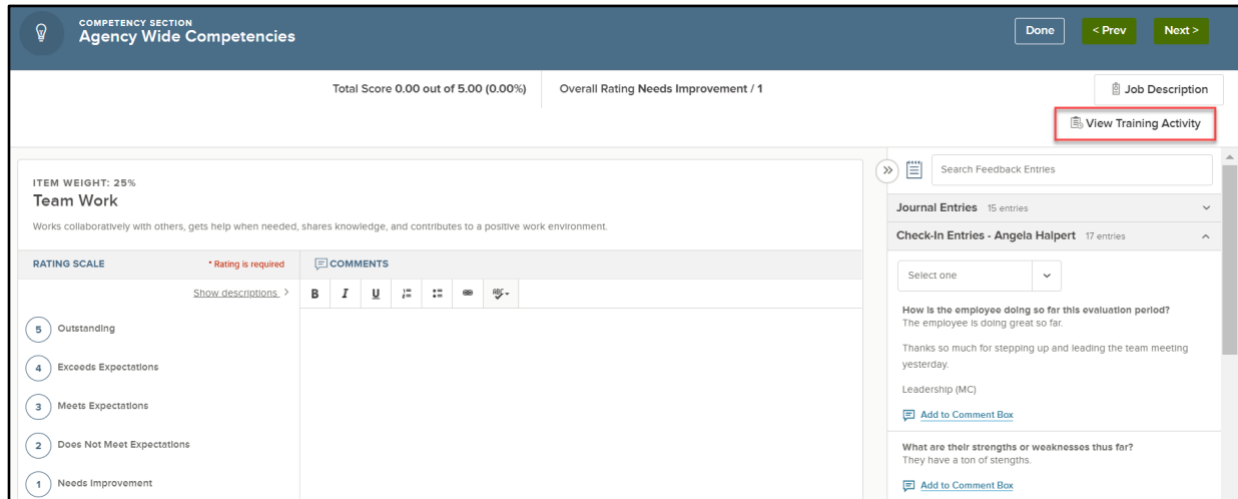
Figure 90: View Training Activity Button

Whether your Rater(s) of Record are evaluating competencies and goals, or just commenting on narrative items, they can see and access the **View Training Activity** button on each item. This button allows them to view the training history for the employee in Learn.

In the instances where the Rater is trying to complete their rating in Perform but are curious as to whether or not the employee completed trainings they were previously enrolled in, the rater can easily access the View Training Activity tab to find that information. Let's access this information to see whether or not they have completed their trainings related to NEOGOV products.

To view the training history, select the **View Training Activity** icon and review the following message.
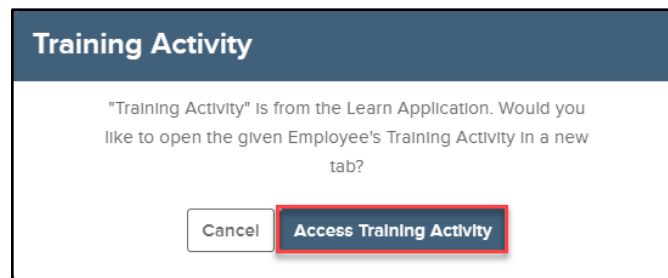
Figure 91: Access Training Activity Button

Accessing the Training Activity opens a new tab within your browser, which directs into Learn. To proceed, select **Access Training Activity**. This saves users lots of time by not having to toggle into Learn, locate the employee, and then view their training activity. Instead, two clicks from the Rating form in Perform takes managers to that information on their direct reports instantly!

In the screenshot below, we can see right away that the employee has completed several trainings related to other NEOGOV products, which provides me with the context that I need in order to complete my ratings in Perform.

Figure 92: Employee Courses Profile

1. **Completed Courses:** Accessing the training activity tab takes the rater into the Courses tab of the learner's profile, and it defaults to show their Completed courses. This allows the rater to quickly see whether courses they are wondering about have been completed or not.
2. **Profile:** Easily access the learner's profile to view something like the learner's Transcript from that page.
3. **Search Courses:** If there is a long list of courses, simply search by course title to find what you are looking for more quickly.
4. **Advanced Filters:** Apply advanced filters to find courses by attributes like course type, enrolled date, due date, etc.

TIP!

Once the rater is done reviewing the training history
in Learn, NEOGOV recommends closing that tab

Now that we have the information from Learn that we need, we can more easily complete our ratings within Perform.

Figure 93: Perform Rating Item

Add Training Activity

Now that we have reviewed how to seamlessly view an employee's training activity from within Learn, let's see how easy it is to assign training courses within the Rating form. From the Rating form, access the Training Section.

Figure 94: Employee Training Section

Now that the rating is almost complete, it is beneficial to enroll the employee in any necessary training courses, considering their performance over the past evaluation period. Whether they are struggling and need some additional trainings to fill in the gaps, or they are a top performer and just want to enhance their growth and development further, NEOGOV makes it easy for your managers to enroll employees in courses right from the Rating form.

To add a training to the employee's evaluation, select the **+Add Training** icon.
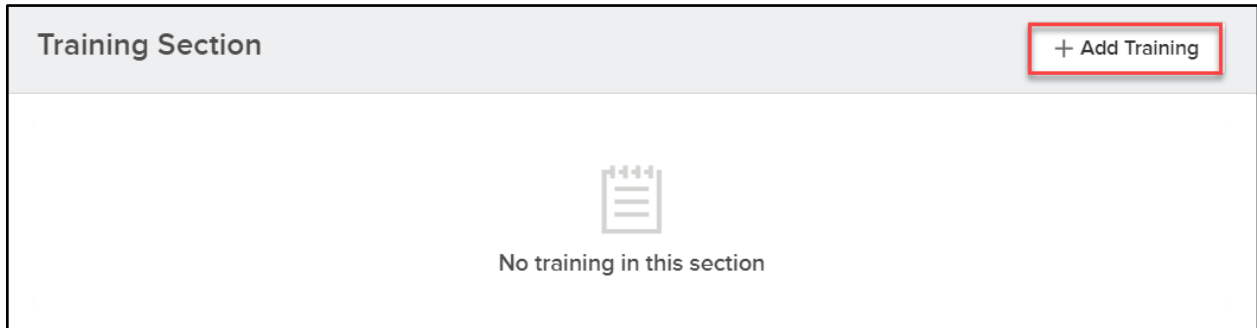

Figure 95: +Add Training Button

This opens a fly-out with a list of Online Training Courses from Learn that the manager can assign to the employee. This makes it very easy for your Rater(s) of Record to quickly browse through the available courses and assign necessary trainings to the employee, all from the Rating form within Perform.

TIP!

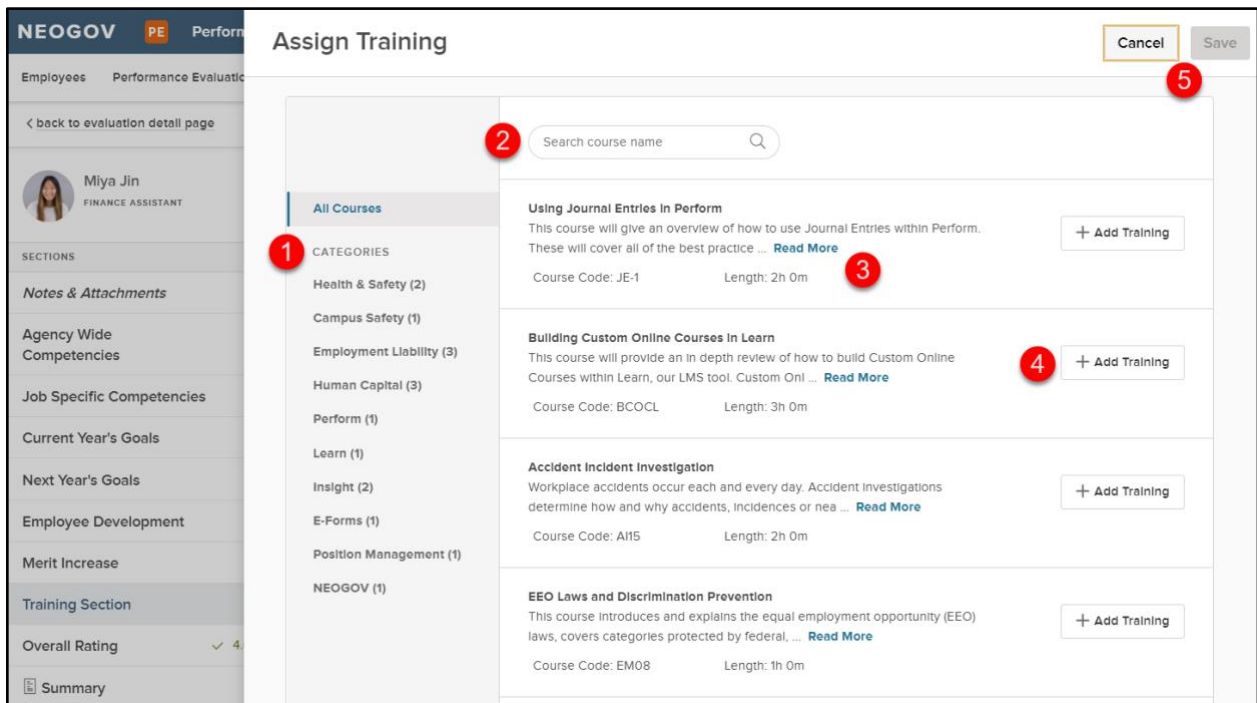Only Online Courses are available via this connection

Figure 96: Assign Training Flyout

1. **Categories:** Sort by categories to find the training courses you are looking for more easily
2. **Search:** Use the search bar to locate training courses by their titles
3. **Course Details:** Read up on the course description and see how long the course may take to complete within the course details

4. **+Add Training:** Once you locate the training course(s) you want to assign, select +Add Training. Also, multiple courses can be assigned to the employee at once. Simply select the +Add Training icon for all the courses you would like to assign, then be sure to select Save
5. **Cancel and Save:** Add the selected training courses to the Training Section by selecting Save. Or select Cancel to stop this process

NOTE: At least one training course must be selected in order for the Save button to become enabled. Also, multiple courses can be assigned to the employee at once. Simply select the **+Add Training** icon for all the courses you would like to assign, then be sure to select Save.

For our example, I know the employee wants to develop their managerial skills for the future, so I have assigned them two courses on hiring techniques.
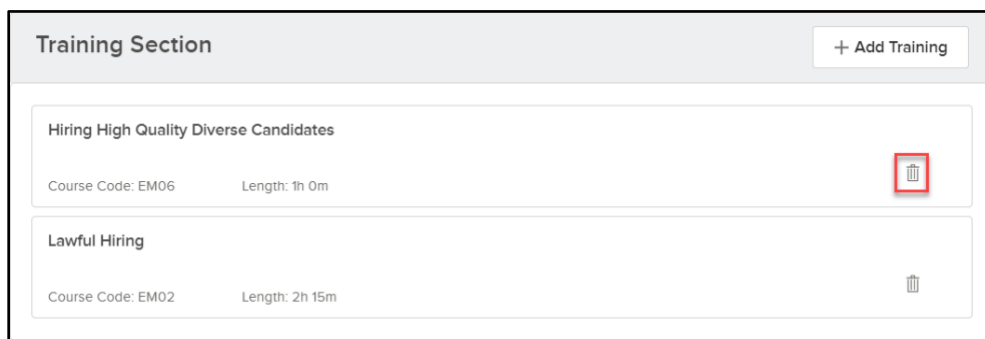

Figure 97: Trash Icon

Once the courses have been assigned, they appear in the Training Section within the evaluation. To remove a course you may have mistakenly added, select the Trash Icon. Please note, however, that the employee is not enrolled in either of the courses at this point.

Once you have completed the entire rating process, be sure to select the **Submit Evaluation** button in the top right of the Rating form.
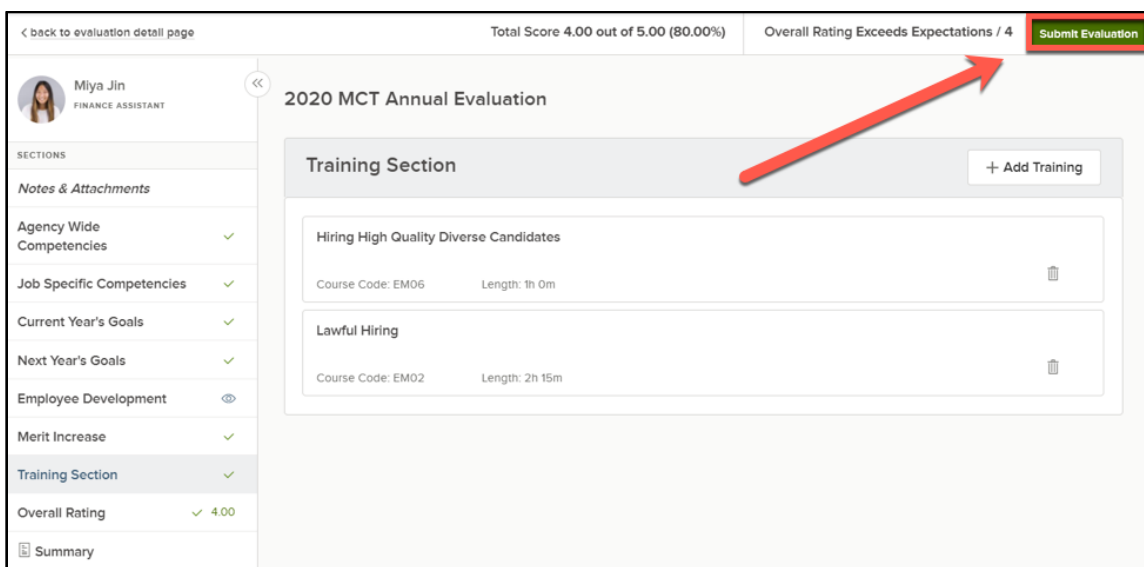

Figure 98: Submit Evaluation Button

NOTE: The Training section is <u>optional</u> for Raters of Record. Managers do not have to populate this section to submit the evaluation. It can be left empty if managers so choose.

Any approvals would then take place as they normally would for the evaluation process. Please note, the Training Section does not appear on the Approval form or the evaluation print-out. If necessary, the Training Section can be viewed from the Evaluation Details Page.

Once any approval tasks have taken place and the evaluation is released to the employee, the employee would then be enrolled into the training course(s). Once the evaluation is released to the employee, the enrollment process for the courses is triggered. Any course approvals take place and if the employee is already taking the course, then the status on the Training Section within the evaluation details page updates accordingly.

Figure 99: Training Section

The employee can click on the name of the course within the Training Section on the Evaluation Detail Page to be directed into the Course Details Page within Learn where they can start the course.
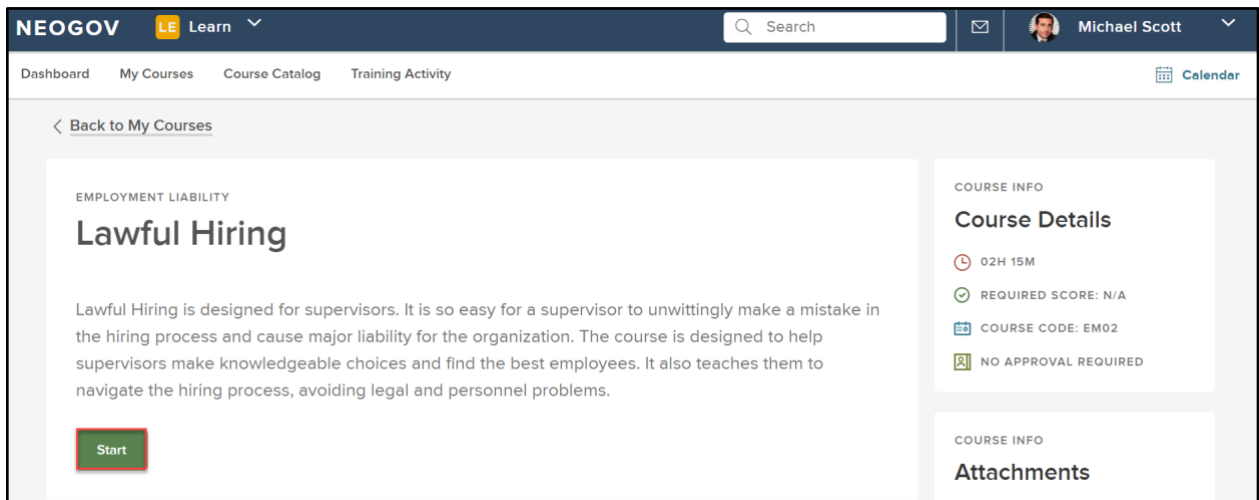

Figure 100: Course Details Page > Start Button

Once they are taken to the course details page within Learn, the employee can Start the course to ensure they complete the Training that was assigned to them on their Evaluation within Perform. They can also complete the course from the Your Activity section of the Dashboard if they log into Learn directly.