COMMONWEALTH

Training Coordinator

Version 4.0

The Office of Diversity, Equality, and Training (ODET) is responsible for the development and implementation of policies, procedures, and programs to promote and monitor statewide workforce management in the areas of equal employment opportunity, affirmative action, retention, inclusion, and diversity. ODET, actively strives for a more diverse work environment and works with all executive branch agencies to increase diversity and cultural sensitivity among state employees. ODET also serves as the centralized resource for the education, training and development of state employees and agencies. Our instructor led classes, online courses, certificate programs, consultation services and other statewide programs are provided to support the agencies we serve in their mission to grow and develop employees of all types. We offer a variety of training and development programs to assist state employees of all levels with leadership skills, individual performance, skill building, and career development. Many of the courses offered, are designed not only to help employees meet minimum qualifications for advancement, but also to build the skills, competencies and sensibilities necessary to grow, learn, lead and serve the Commonwealth in a variety of different influential and leadership roles.

ODET is located at the Kentucky State Office Building, 501 High Street, 1st Floor, and Frankfort, KY 40601. For more information, contact the: Office of Diversity, Equality and Training.

This administrative manual provides a guide for Commonwealth of Kentucky State agency personnel to train and maintain qualified personnel in the Commonwealth University Learning Management System referred to as CommonwealthU.

Table of Contents

System Requirements

There are no hardware requirements, no software maintenance and no network administration required.

Minimum Desktop Requirements:

- **Browser Versions Supported Include:**
  - **Internet Explorer 11**
    - Internet Explorer 11 works best with MyPURPOSE, lower versions of IE will not be compatible. Must have pop up blocker turned off.
  - Firefox 4 and above
  - Safari 8 and above
  - Opera 27 and above
  - Microsoft Edge
  - **Google Chrome**
    - Google Chrome also works well with MyPURPOSE- the pop up blocker must be turned off and the Flash player enabled.

- **Browser Compatibility Settings and Security Requirements:**
  - Support for Transport Layer Security (TSL) (Must support 256 or 128 bit TLS encryption)
  - Cookies and JavaScript are REQUIRED to be enabled.
  - Pop-up blocker must be disabled for the Cornerstone Application

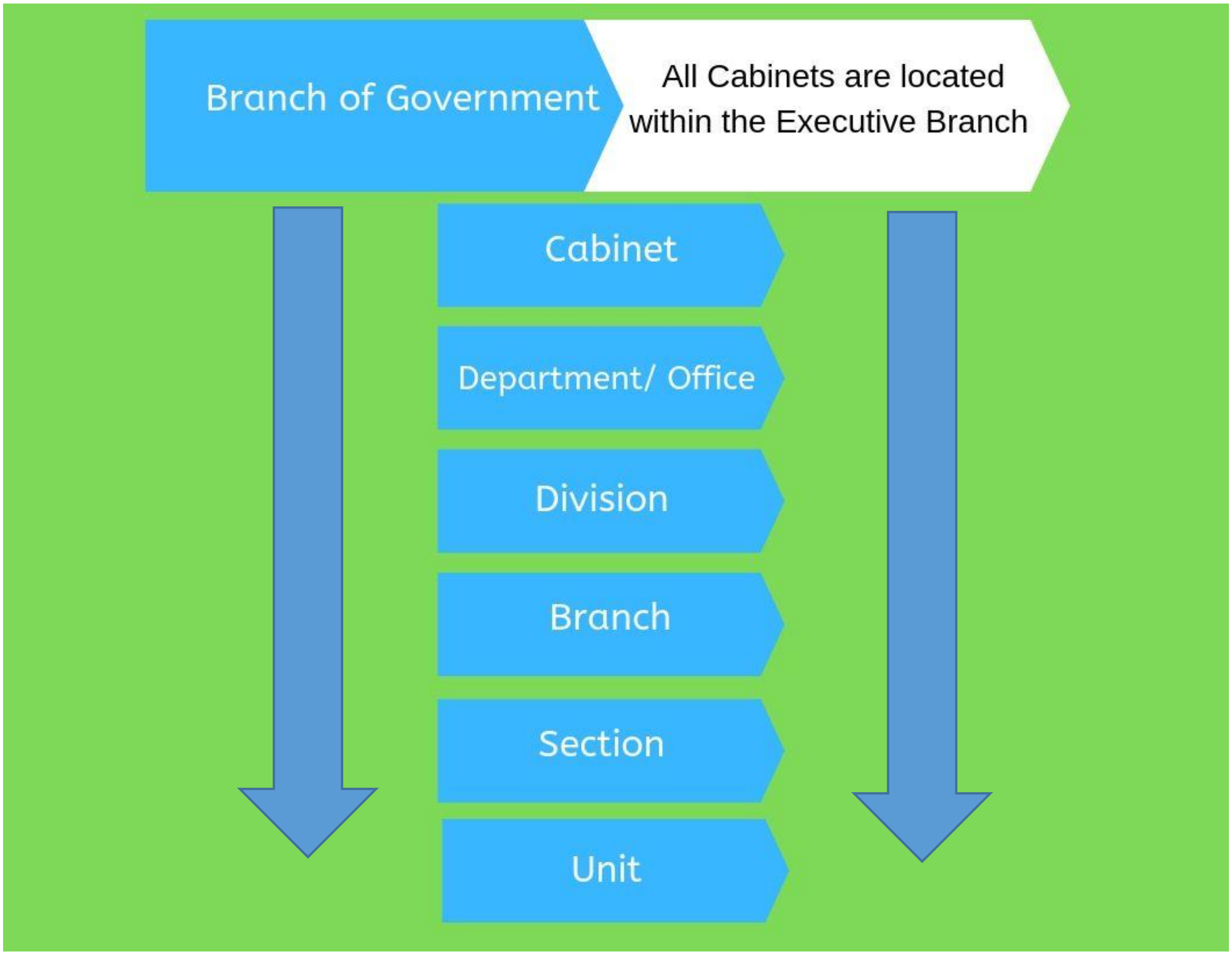
- **Display Resolution:**
  - A resolution of 1024x768 or higher is recommended.
  - Display color: minimum color quality requirement is 16 bit; optimal is 32 bit.
- **Network and Connectivity**
  - Minimum 128kbps. 256kbps is recommended.

- **Plug-ins**
  - The Performance and Succession platforms require Adobe Acrobat Reader to view reports that export to PDF. Adobe Acrobat Reader is also required to view training completion certificates. Additional plug-ins may be need to be enabled for users to access e-learning courses hosted on Cornerstone, such as Shockwave, Java, etc.

- **Mobile Device**
  - Mobile applications are available on devices running iOS 8 and above and Android 4.4 and above. Additionally Cornerstone is mobile browser accessible through Windows Phone 8 and above, iOS 8 and above, and Android 4.4 and above.

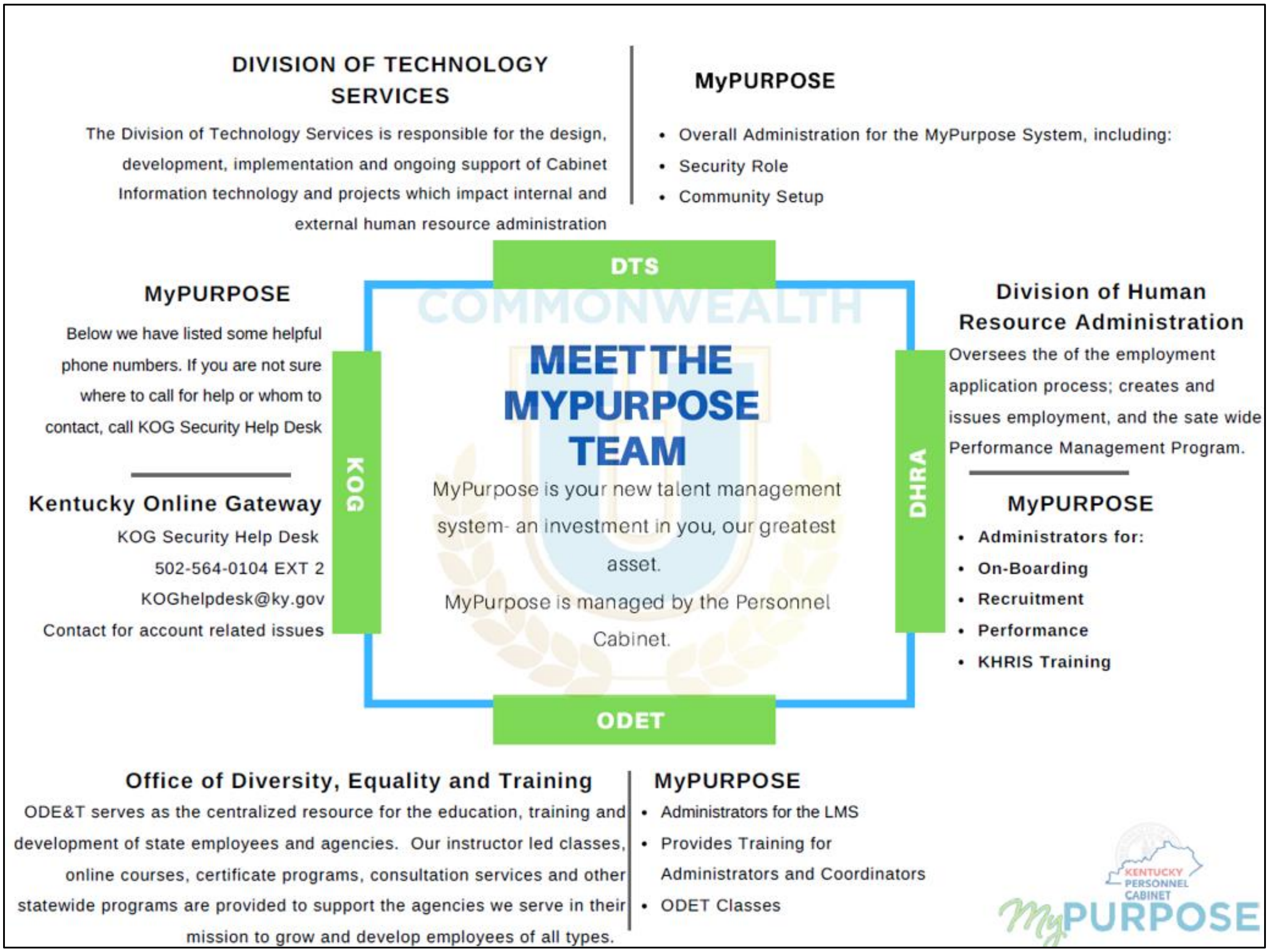
Organization Breakdown in MyPURPOSE

The organizational breakdown in MyPURPOSE is structured very similar to the organization breakdown within KHRIS. Administrators and Coordinators will have the ability to select availability for Learning Objects based on the break down.



Meet the MyPURPOSE Team

MyPurpose is managed by the Personnel Cabinet. The infographic below will highlight each of the areas and the functions that they serve in MyPURPOSE.



Pilot Access

What is Pilot?

- Pilot is the test site for MyPURPOSE. This site can be used as a playground to ensure that system settings are configured properly.
- Pilot contains old data.
- Training Administrators and Training Coordinators are encouraged to test in pilot before entering into production.

➢ **To access My Purpose please logon to the Pilot: My Purpose web address:** https://kypersonnelcabinet-pilot.csod.com

What should you test for?

Pilot is a great tool to test the way we do business. Some items that you may test in Pilot include:

CSOD Learning Object	Training Coordinators	Training Administrators	What to test for?
Online Course Uploads(SCORM or AICC)		✓	➢ All pages of the course play. ➢ Audio has been attached. ➢ The course reports to the LMS score/ completion. ➢ Does the course launch within the system ➢ Can you search for it?
Material- PDF, PowerPoint, Word		✓	➢ Does the material launch? ➢ Does the material complete on the transcript? ➢ Is the training viewable?
Material- URL		✓	➢ Does the material launch? ➢ Does the material complete on the transcript? ➢ Is the training viewable? ➢ Is this the correct URL Link?
Video		✓	➢ Does the video play? ➢ Does it give credit on transcript when completed? ➢ Does the video have audio? ➢ Are all parts of the video visible?
Curriculums		✓	➢ Set up of curriculum ➢ Structure of curriculum ➢ Functionality of curriculum ➢ Does it fit your business need? ➢ Does the curriculum give credit for completing?
Learning Assignment Tool	✓	✓	➢ Set up of the learning assignment ➢ Does the assignment process ➢ Does the due date for an assignment work ➢ How does this look on transcript
Tests		✓	➢ How to create a test ➢ How does the test look to end user? ➢ How does test look on transcript?
Evaluations		✓	➢ How to create an evaluation ➢ How does the evaluation look to end user? ➢ How to attach to the ILT Event.
ILT Events	✓	✓	➢ Creation of the Event
ILT Sessions	✓	✓	➢ Creating a Session ➢ Completions on Roster ➢ How it appears on transcript (should show at the Event level) ➢ Parts- how to set them up including part breaks

Requesting Learning Security Role for MyPURPOSE

Security Process Update

STEP 1:

All requests for access as a Training Administrator or Coordinator will need to be reviewed by your agency Training Administrator.

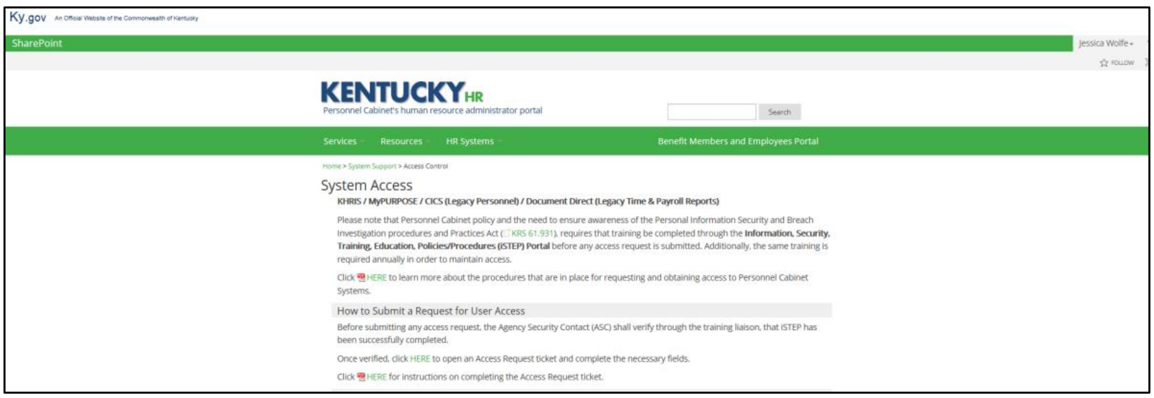
STEP 2:

Users will then need to complete the appropriate instructor led training class for the corresponding role. Users MUST also complete iSTEP

STEP 3:

ASC's will need to verify that both training requirements have been completed prior to requesting access into the system.

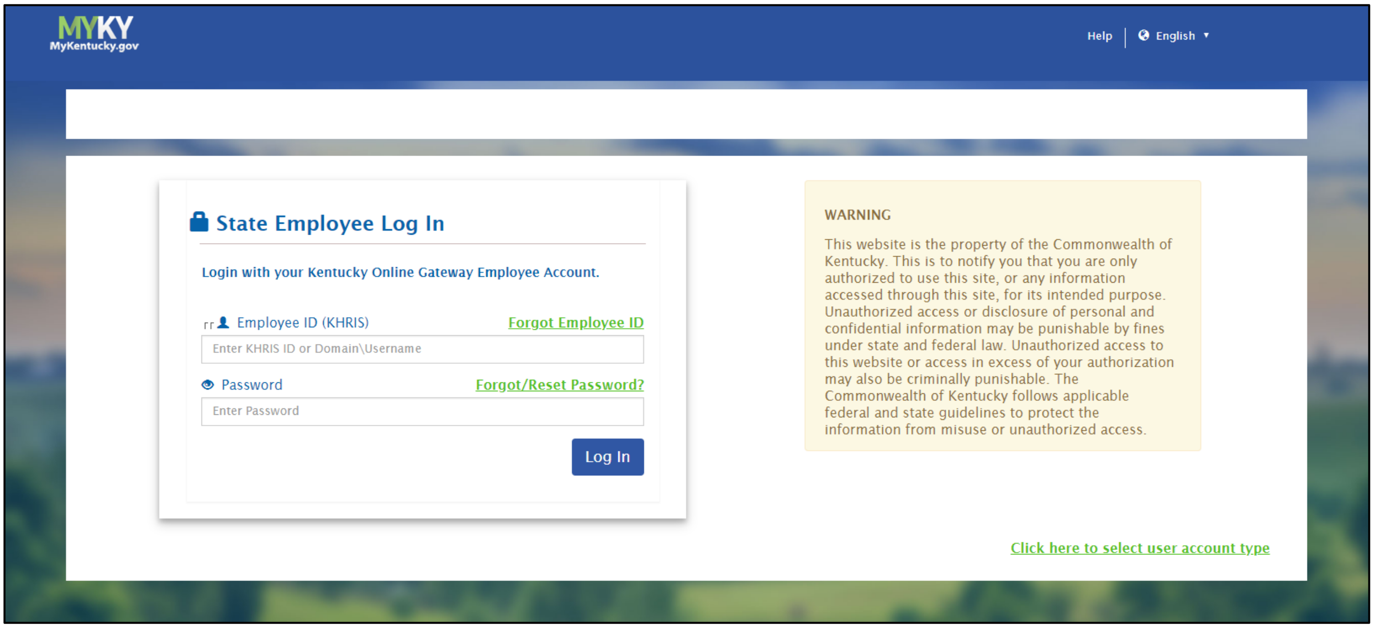
- All requests for security must go through the Kentucky HR Administrator Portal. These must be submitted by your Agency Security Contact. Before the ASC submits the request they must verify that all training has been completed prior to the request.



If a coordinator or administrator leave the role as the training liaison, the ASC MUST submit a REVOKE access request to MyPURPOSE.

Logon Issues

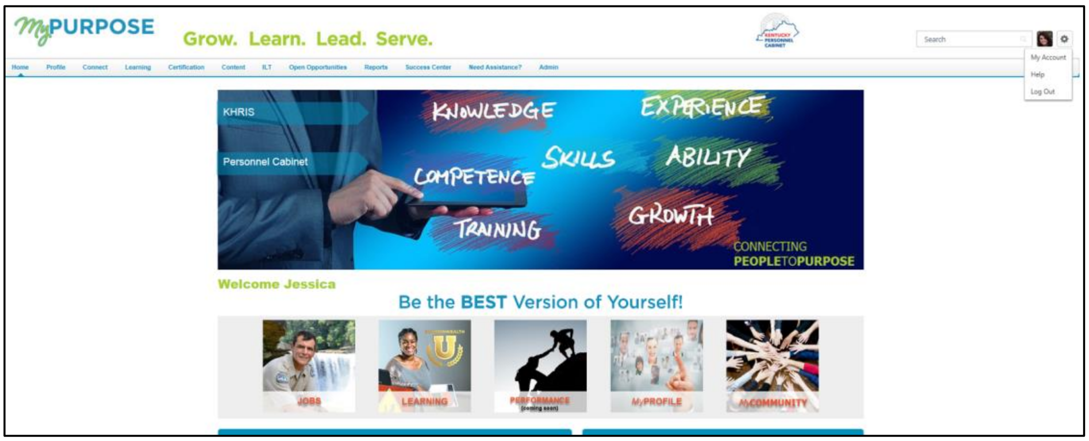
All password resets/ logon issues should go through the KOG helpdesk (Kentucky Online Gateway). ODET no longer has the ability to do password resets for production. **If the user receives the screen below they will need to use the Employee ID and the password that they log into their workstation with.**



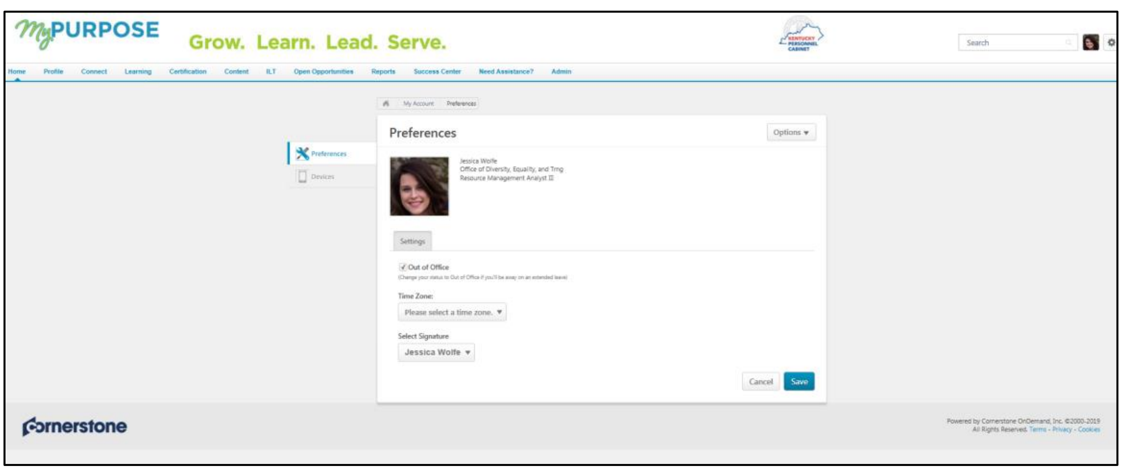
Locating Personal Preferences and Setting Out of Office

Learners and Managers have the ability to edit their personal preferences and set their “Out of Office” in MYPURPOSE. Select this option to indicate that you are out of the office or absent for an extended leave. If the “Out of Office” functionality is checked and the user is a manager/approver with training requests to approve, the approval request is routed to the next person in the approval chain (if the approval process is required).

1. To set the “Out of Office” setting from the homepage select “Settings Icon.” From the drop down menu select “My Account.”



2. On the Preferences screen you will be able to update information, including your Time Zone, E-signature font and the “Out of Office” status. To enable the “out of office feature add a check mark in the indicator box. Select save.

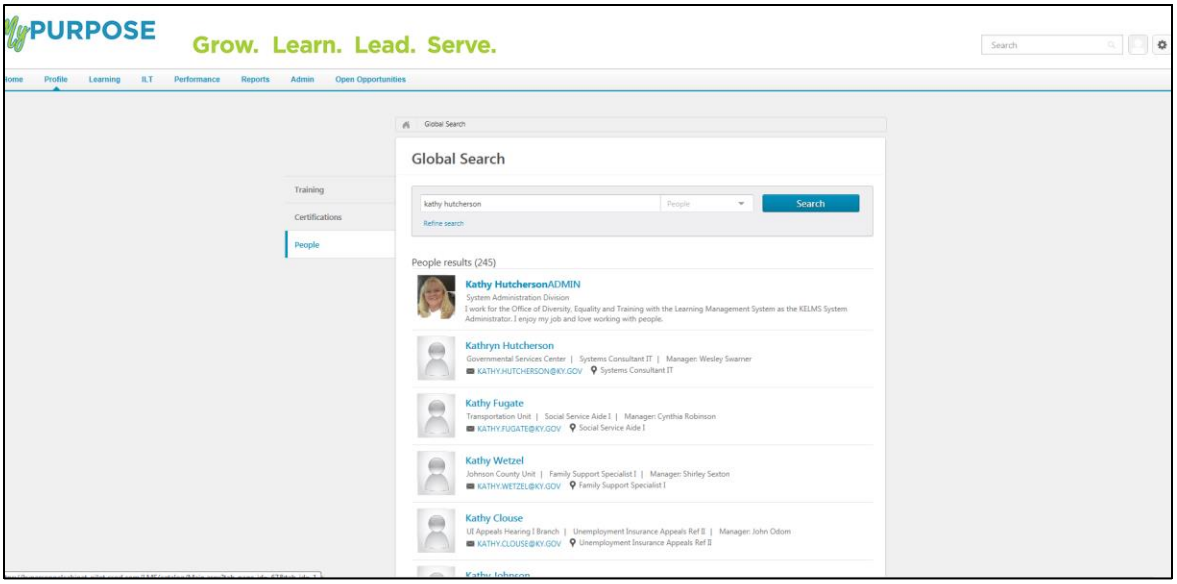


The out of office feature is now enabled. If the user is a manager and this option is enabled, all request from their employees will be directed to the next line supervisor, including pending requests. Managers that will be out on an extended leave, must enable this option within the system.

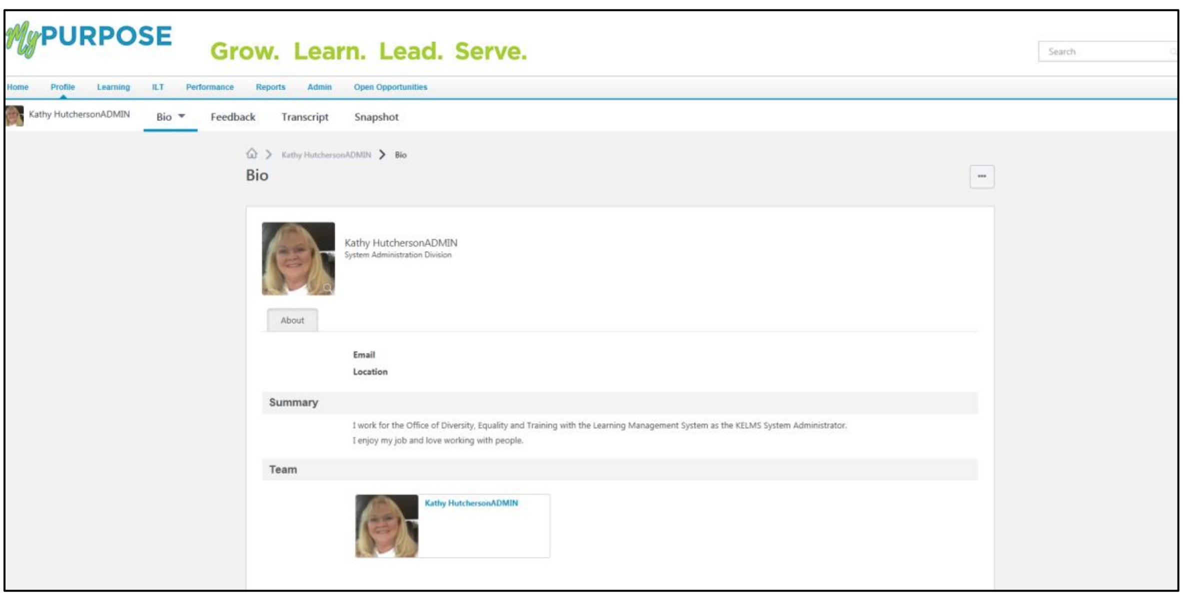
Locating a User Transcript

Locate the **Global Search in the upper right corner of the screen**. **Enter** the name or user id that you would like to find.

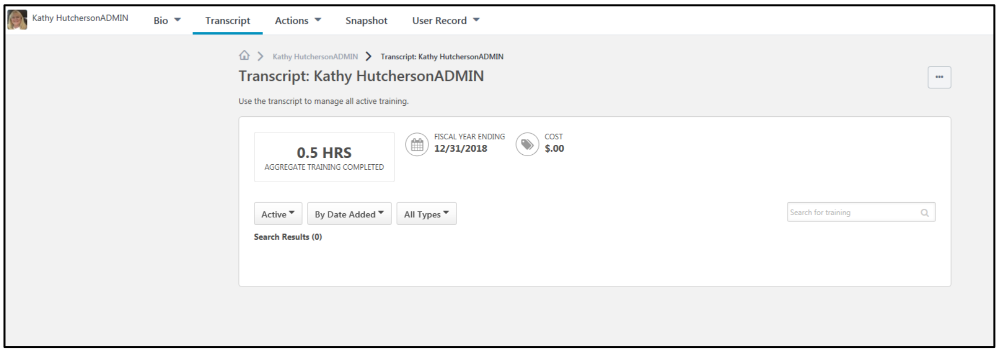
1. Global Search will return matching results under the **People tab**. **Select the user's name**.



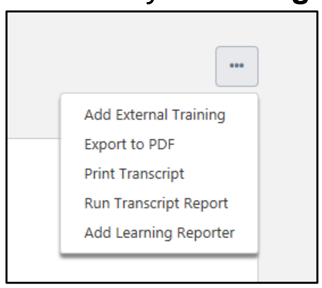
2. To review the User Record, **select the User Name hyperlink**. Once selected, this will pull up the Universal Profile. The Universal Profile screen will show the general information from the account.



3. To view the user's transcript, **select Transcript** at the top of the page.
4. The Transcript page will show all completed and registered trainings. Trainings that have been completed will show at the top of the screen with total hours.



5. Training Transcripts can be exported to PDF by **selecting the ellipsis"…" tab**.



From the drop down menu the options below will appear:

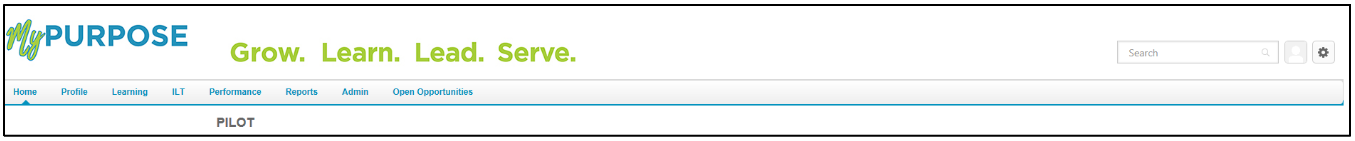
- **Add External Training-** This option will allow you as a Training Coordinator to add a self-reported training to another user's transcript. (See PAGE 15)
- **Export to PDF-** This option will allow the transcript to be reported to a PDF file. Each page of PDF must be printed individually. ONLY EVENTS will show on the PDF.
- **Print Transcript-** This option will print the training transcript.
- **Run Transcript Report-** This option will allow Coordinators and Admins to run a report exported out in to EXCEL. This option will pull up a report page, you must enter in the criteria that is desired. You must leave sessions off of the report to get an accurate amount of training hours.

6. To Exit the user profile, **select My Purpose at the top of the screen**.

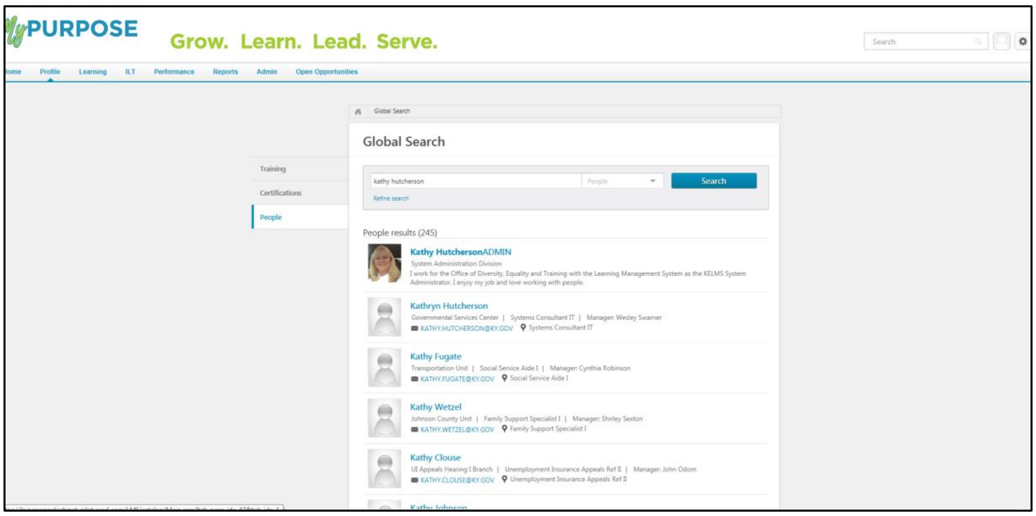
Archiving a Training on User Transcript

Many times users may have training that no longer applies on their transcript. Users and administrators have the ability to archive the training to the transcript. This will still keep the record of the completed training, however it will remove it from the active transcript. To archive a training:

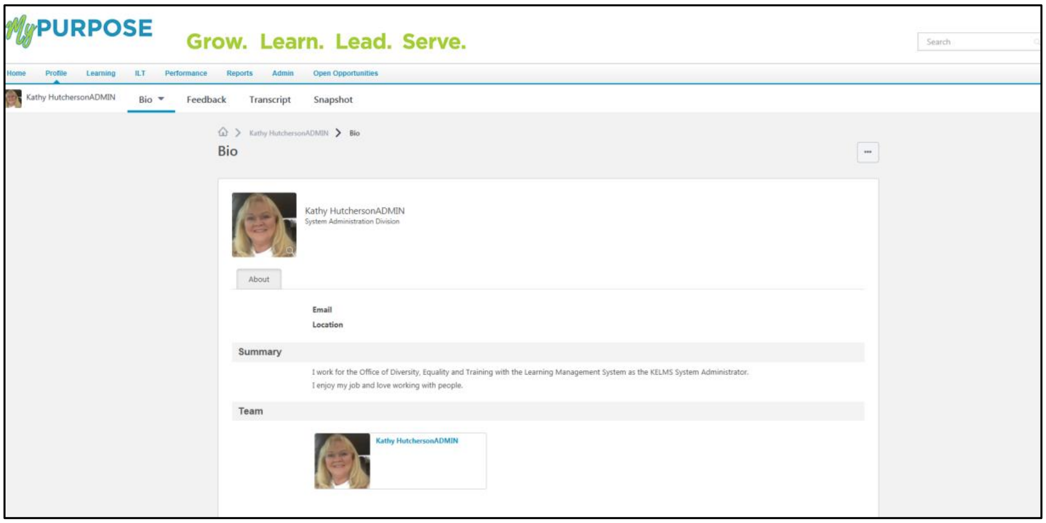
1. Locate the **Global Search in the upper right corner of the screen**. **Enter** the name or user id that you would like to find.



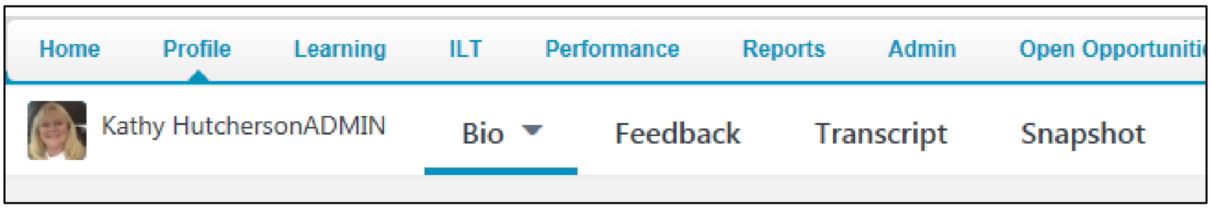
2. Global Search will return matching results under the **People tab**. **Click on the user's name**.



3. To review the User Record, **click on the User Name hyperlink**. Once clicked, this will pull up the Universal Profile. The Universal Profile screen will show the general information from the account.

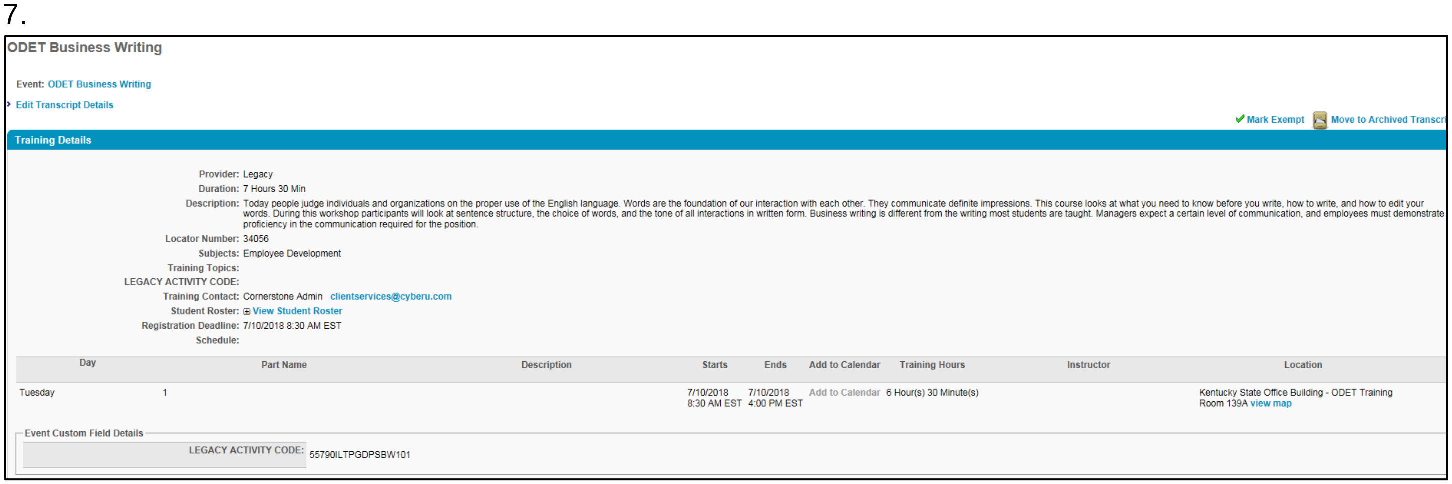


4. To view the user’s transcript, **click Transcript** at the top of the page.

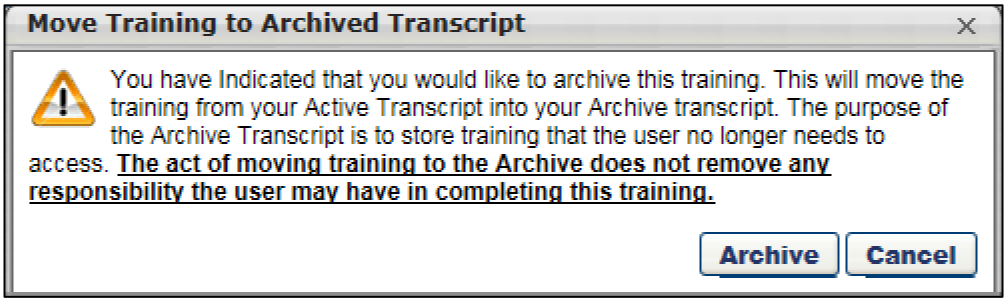


5. Once on the transcript the Active trainings will show. Trainings can be moved to an archived state by click on view training details.

6. The Training details screen will show specific information regarding the entry on the users transcript. In the top right Admins and Coordinators should have the option to Move to Archived Transcript. Click Move to Archived Transcript.
7.



8. A system message will appear to confirm the move to the Archived Transcript. Click archive. Users will no longer see this on their Active Transcript. Please note that this does not remove the training from the users record, it moves it to an archived state.



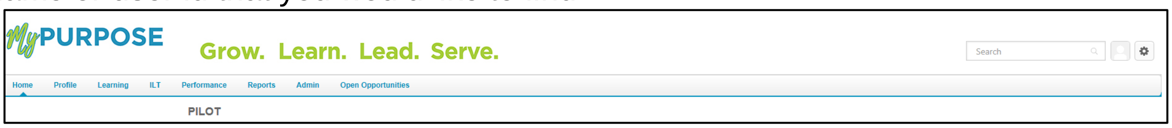
Adding External Training to Transcript

WHEN TO ENTER EXTERNAL TRAINING

- External training should only be used for users that attended a training from an outside agency.
- Trainings that are conducted by ODET should not be entered in as External Training. This includes CSE training classes.
- Employees have the ability to record their own External Training. Managers must approve the training before it is completed on the transcript.

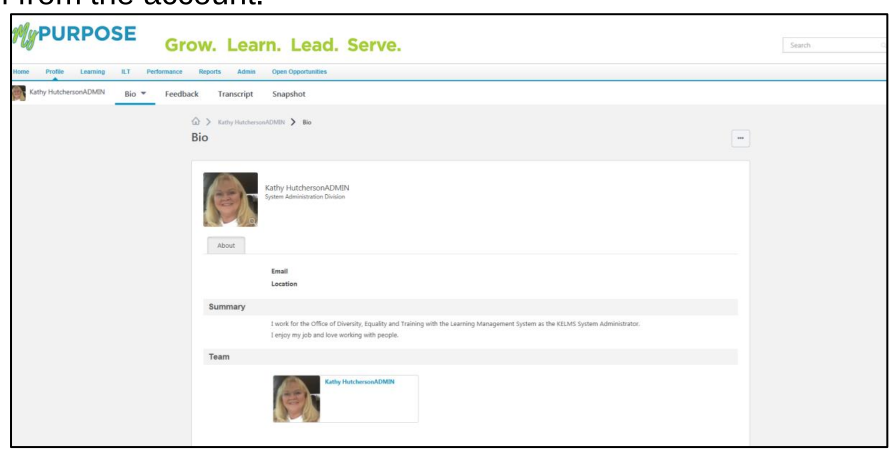
To Record an External Training

1. Locate the **Global Search in the upper right corner of the screen**. **Enter** the name or user id that you would like to find.

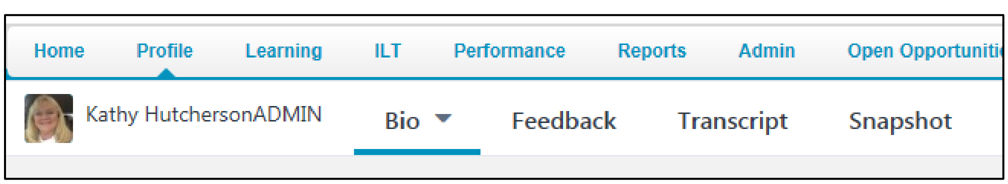


2. Global Search will return matching results under the **People tab**. **Click on the user's name**.

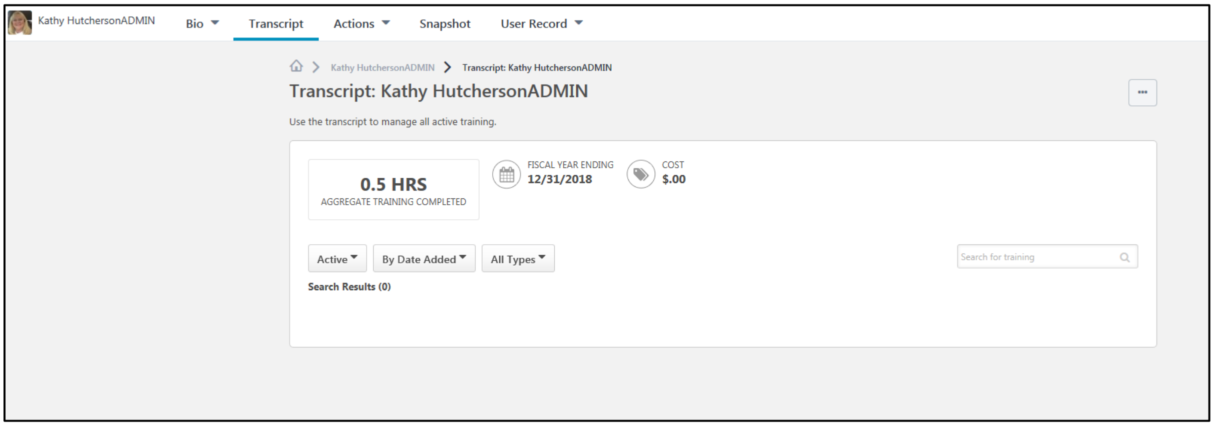
3. To review the User Record, **click on the User Name hyperlink**. Once clicked, this will pull up the Universal Profile. The Universal Profile screen will show the general information from the account.



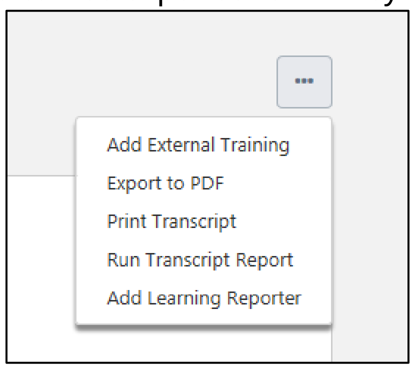
4. To view the user's transcript, **click Transcript** at the top of the page.



5. The Transcript page will show all completed and registered trainings. Trainings that have been completed will show at the top of the screen with total hours.



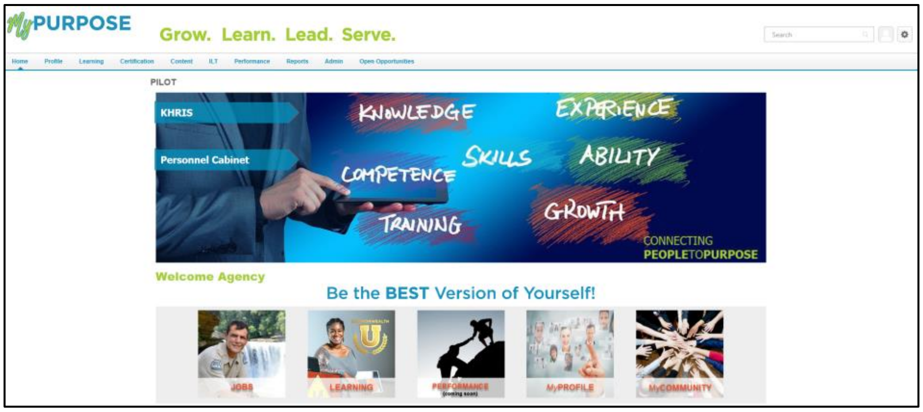
6. Training Transcripts can be exported to PDF by **clicking on the "…" tab**.



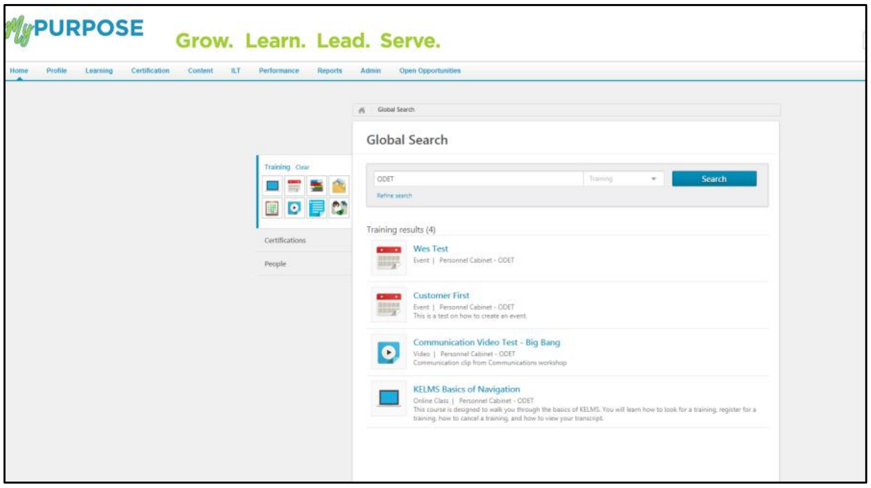
- **Add External Training-** This option will allow you as a Training Administrator/Coordinator to add a self-reported training to another user's transcript.
- **Self-Reported training- requires manager approval. Once approved the user must go back to their transcript page and mark the training as completed.**

Searching for Learning Objects

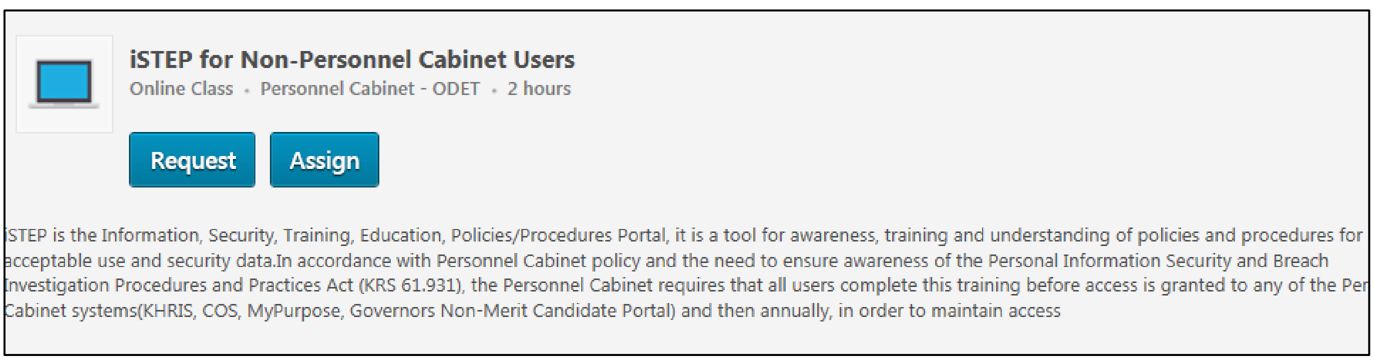
1. To search for a Learning Object, **select the Global Search Box**.



2. Type in the name of the training. This will pull back any matches.



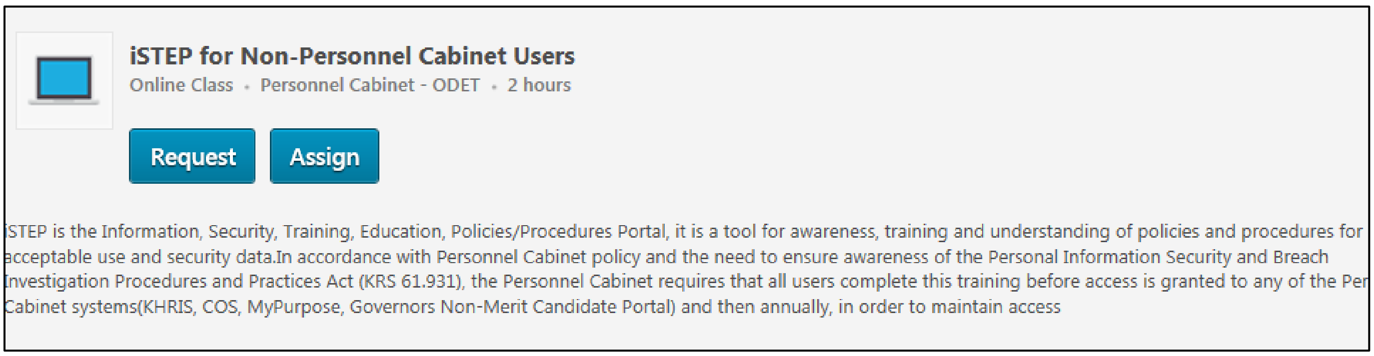
3. **By selecting the course tile**, users will be able to request the training from this page.



Requesting Training

MyPurpose is designed to allow users to enroll themselves for a variety of different learning objects. When a learner requests a session or course, an email notification is then sent to the manager requesting approval to attend/complete the training. Managers also have the ability to assign training to their direct reports. As training administrators and coordinators we should be encouraging learners and managers to navigate in the system to enroll or assign training.

- In the picture below you will notice that there is both a request and assign option. The assign option here will not assign the training to users. By clicking assign you are looking at those users that directly report to you. This is how managers would assign training to their employees.



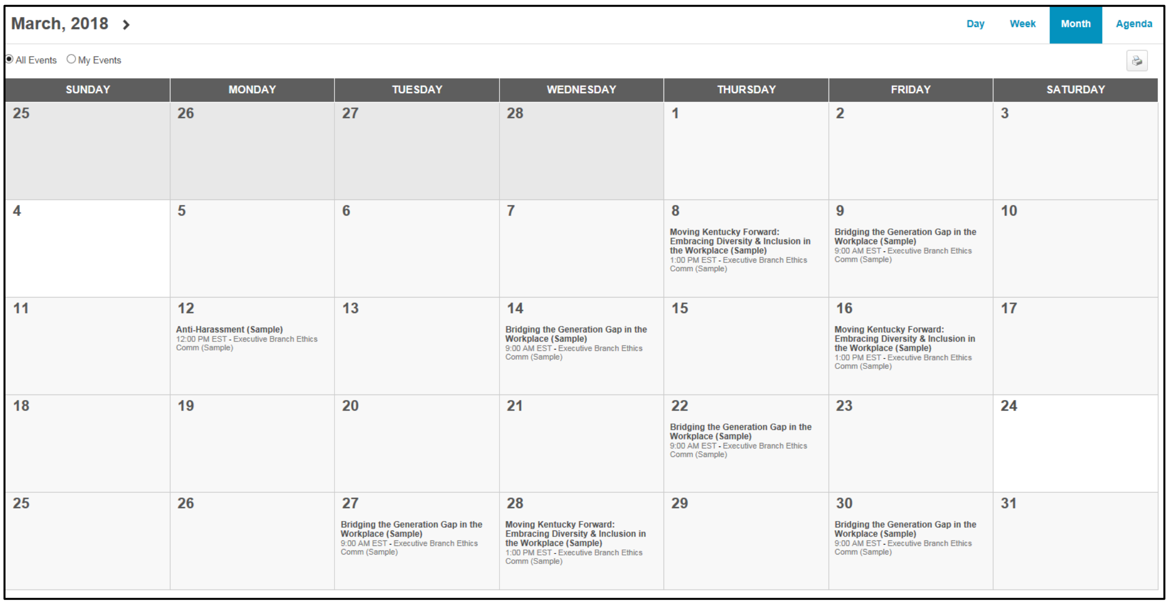
- There may be instances where as a training administrator or coordinator you will need to assign training. Assigning training will put the training directly on the learner's transcript. To do this you will need to go to the Learning Assignment tool.

Using the Learner Event Calendar

Learners also have the ability to view upcoming training, using the Event Calendar will allow a quick glance at upcoming dates.

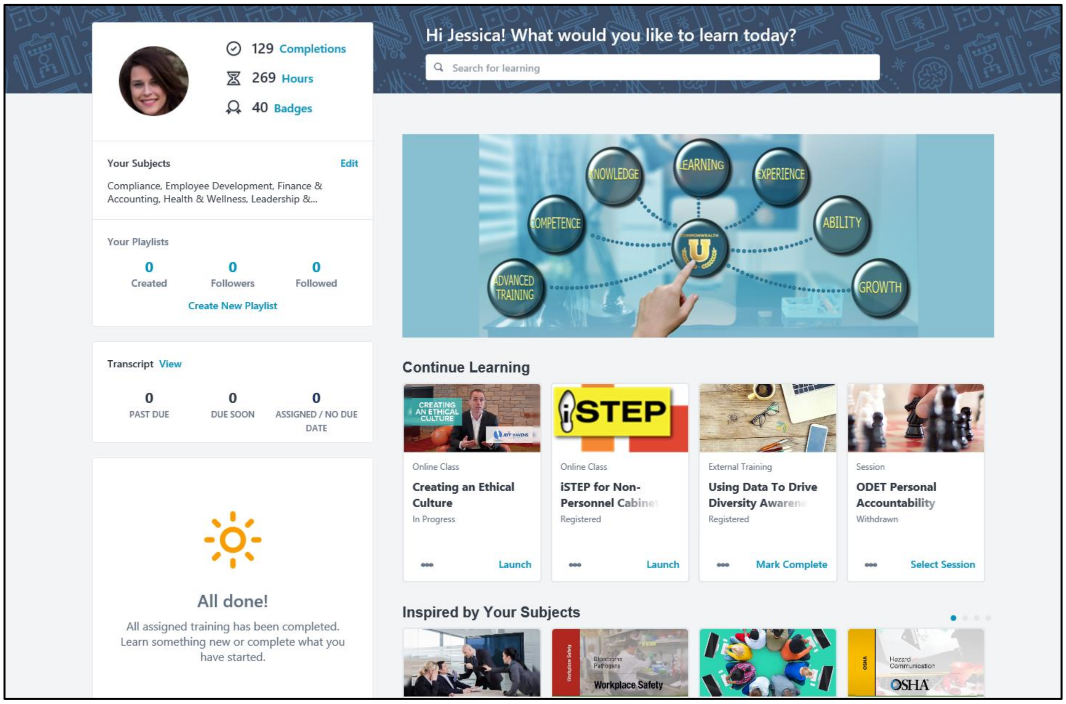
To access the Event Calendar hover over Learning> **select Event Calendar.**

A calendar view will show all upcoming training dates. Users will be able to select from the date or can switch over to an agenda view.



Learner Homepage

The Learner Homepage allows users to have a quick glance at their transcript, subjects and more. The learner homepage is designed to give users suggestions for training opportunities, and allow for a detailed search for upcoming training events.

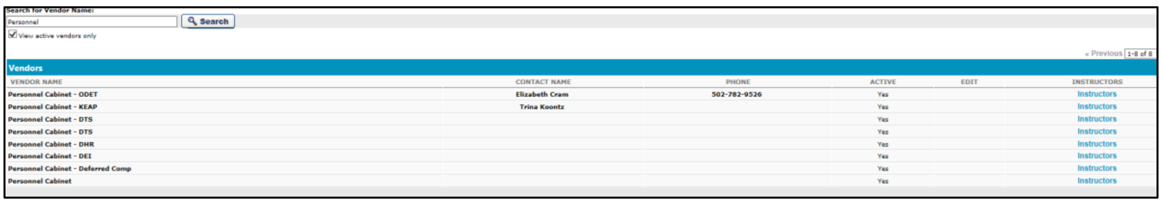


Adding Instructors

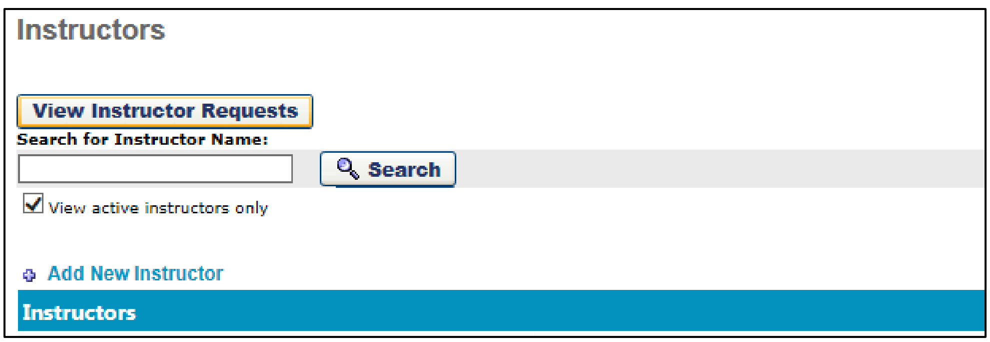
Before an instructor can be added to a session, they must be added as an instructor for the agency.

1. To add an instructor **hover over ILT> Vendors and Instructors**

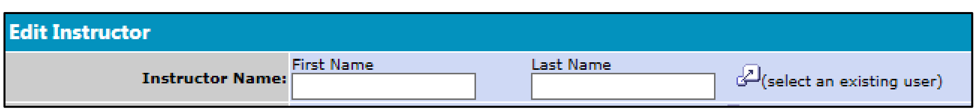
2. Locate Vendor (Organizational Unit) by searching.
3. **Select the instructor link** to the right.



4. Select Add New Instructor



5. Select the Call Out



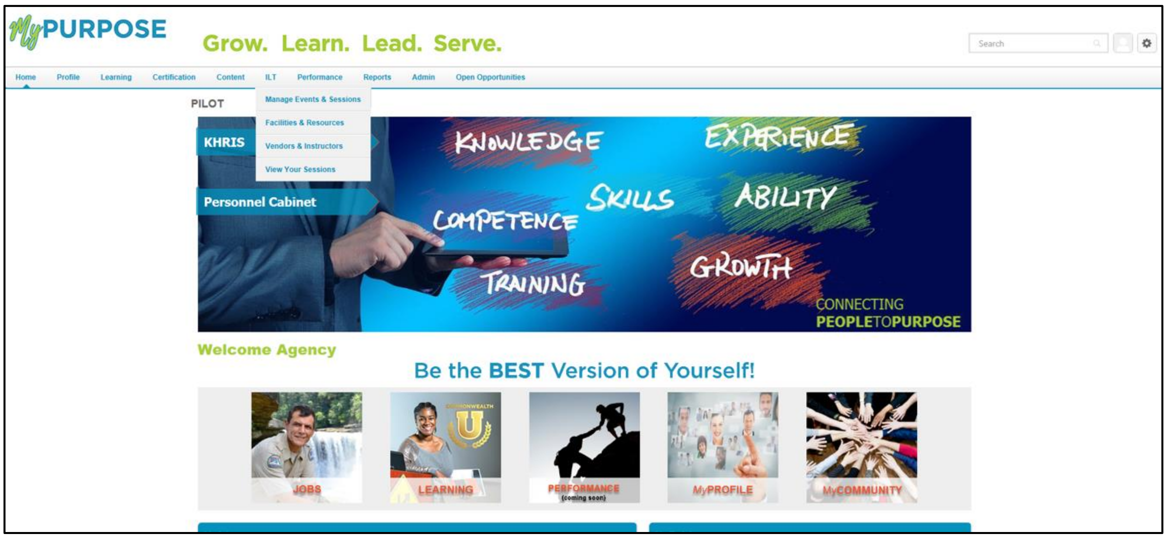
6. **Using the call out search for the name of the instructor**. This will auto populate the information for that user.
7. Verify that they are marked as active.
8. **Select submit.**

Creating an ILT Event

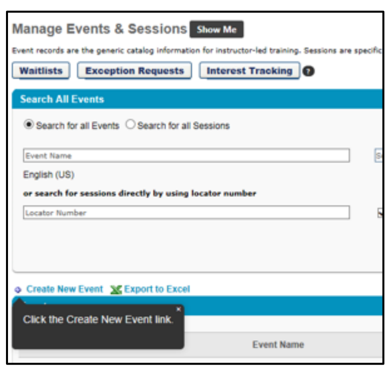
The Event is the shell for ILT sessions. Events and sessions have a parent child relationship. There cannot be a session without the event. Events and sessions must have the same name- The event is what appears on the transcript, by keeping the event and session names the same this will make reporting easier. As we move toward our first full year with the new MyPURPOSE system, we encourage agencies to build new events. This will ensure that the Events are being properly set up, and will help to troubleshoot any issues that may be experienced with sessions.

To create an ILT Event:

1. Navigate to **ILT > Select Manage Events and Sessions.**



2. **Select Create New Event.**

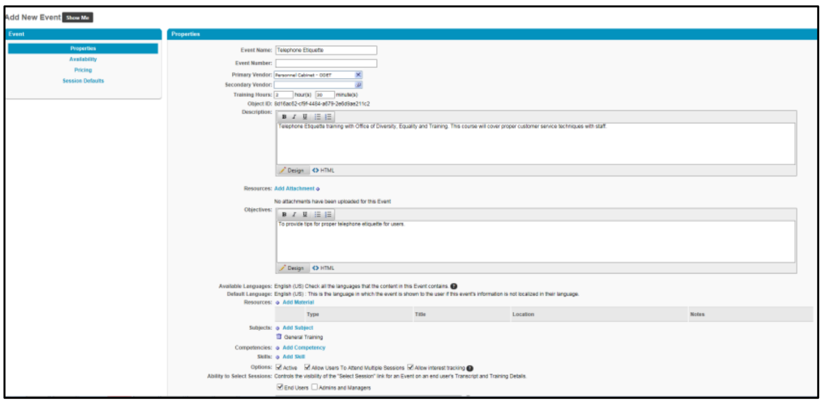


3. **By selecting Create New Event**, the **ILT Event properties page** will appear.
   - The event creation process is separated into three sections.
   - Properties
   - Availability

- Session Defaults

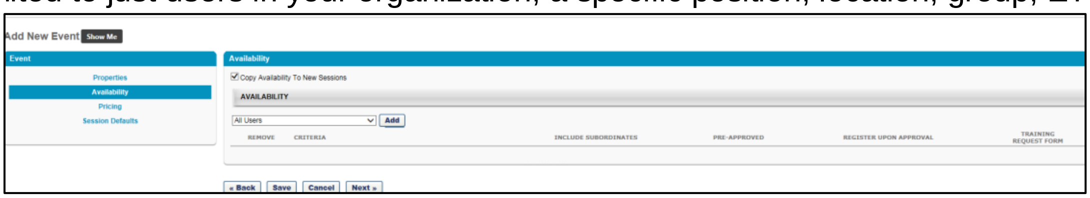
4. To create the event, each required field will need to be filled out.
   Required fields include:

   - Event Name
   - Primary Vendor- **Must be added. This will ALWAYS be the Cabinet that is offering the training.**
   - **Secondary Vendor-Leave blank**
   - Description
   - Subjects-**Must be added**
   - Objectives
   - **Legacy Activity Code-Leave blank**



5. Once these fields have been completed, **select Next.**

6. **Select the availability for users**- this will control who can see the event. This can be limited to just users in your organization, a specific position, location, group, ETC.

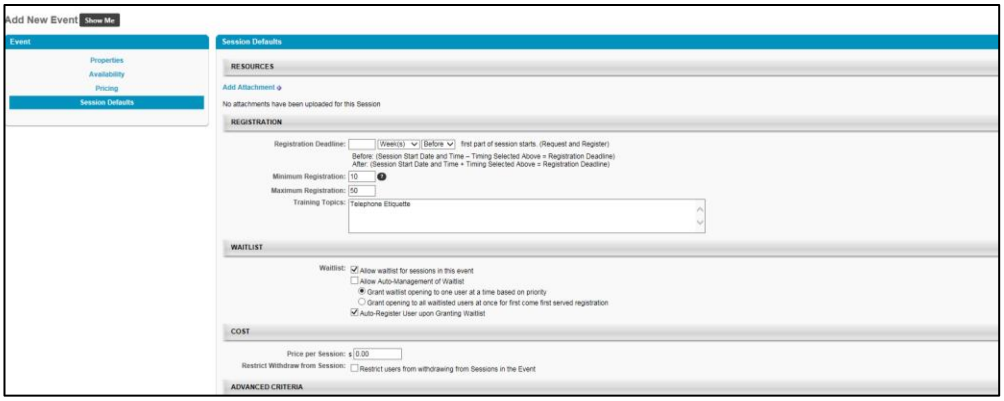


7. **Select Next.**

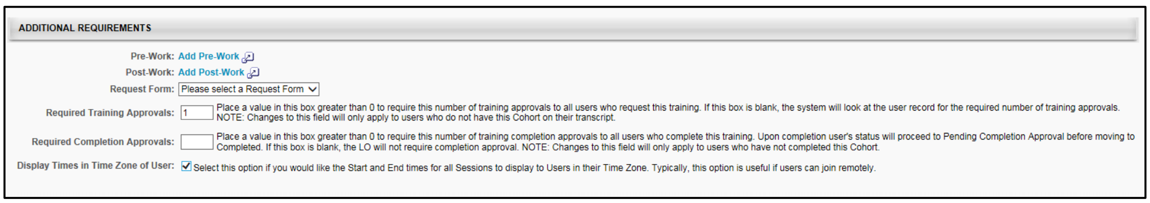
8. The Session Defaults page will set the general parameters for how the sessions will be created.

   - As a Training Administrator, you will have the ability to set a registration deadline, minimum and maximum registration number, and training topics.

- You will also have the ability to set how the waitlist is set up.

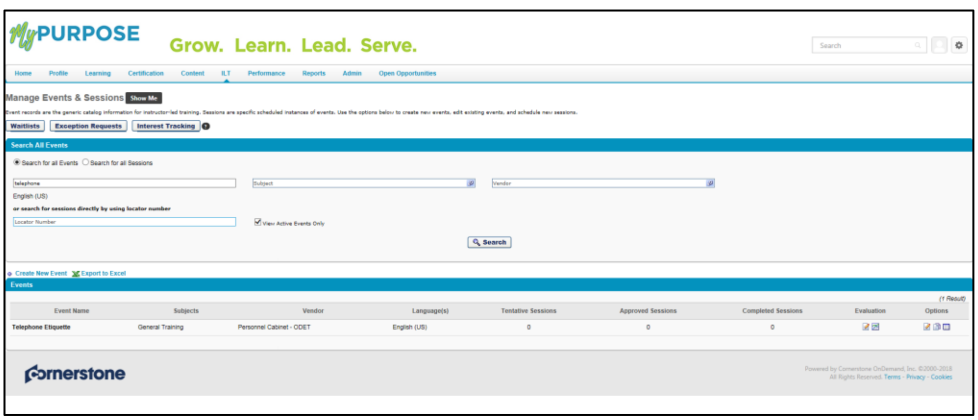


9. As a part of the settings, you can opt for users to be able to see the start and end times in their time zone**.** To do this, select the Display time Zone of User Box.



10. Once completed, **select save**, this will direct you to the Manage Events and Sessions page.

11. To verify that the event has been created, search for the title of the training. In the search field type in the name, subject or vendor.



ILT Session

Sessions must have a start and End date. The dates of the training should be reflective of the date the training was held. Sessions should not have dates that range for days, weeks or months. If sessions range for extended periods of time, users will receive credit for the hundreds of hours.

You should never build a session with the start time of 01/01 and end time of 12/31, this will give thousands of hours to participants

Sessions allow Administrators and Coordinators the ability to create parts. Parts are further breakouts of the session. Creating Parts within a session is not always the best business process. Parts are very difficult to use and can give large amounts of credit hours to the employee that completes the training.

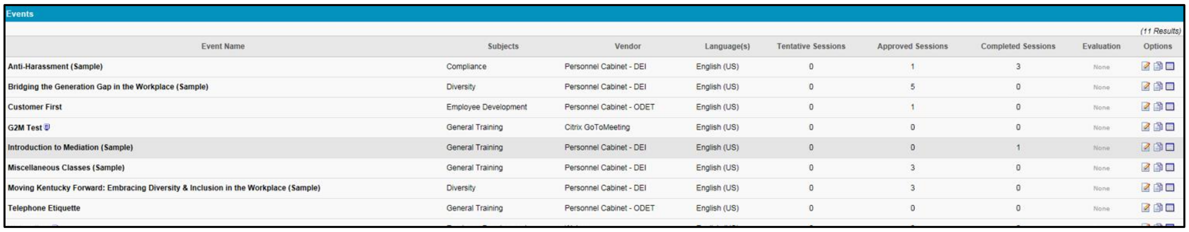
- Parts must contain part breaks which account for the lunch time as well as the time from the ending of one part to another. If these are not given users will receive hundreds of credit hours.

- If creating a part is the best solution for your agency, these ALWAYS need to be tested in pilot first.
    - Somethings to look for would be:
        - Adding Part Breaks
        - Completing out roster- does this fit the need for our agency?
        - Credit given on transcript- are users receiving large amounts of credit hours for the training.
- ODET does not recommend using Parts- as they are so difficult to set up, and may give training hours that were not attended. If you have a training that has multiple days, an ODET recommends a curriculum, events can be created for each day.

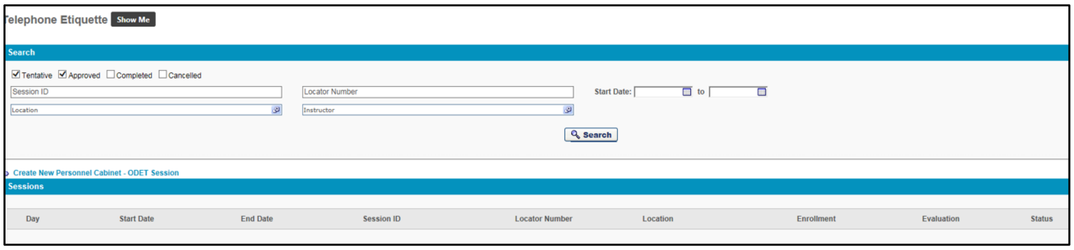
To Create a One Part Session:

1. To create an ILT Event session, go to **ILT > Manage Events and Sessions**.

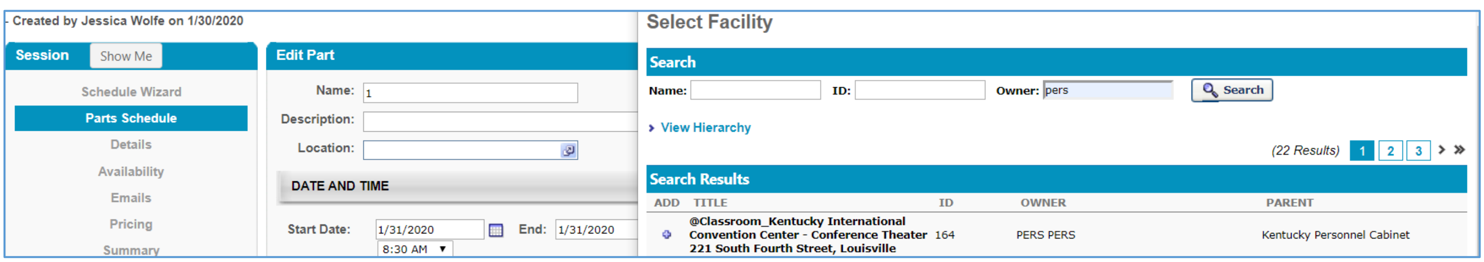
2. Search for the appropriate event and in the Options Column next to the event, **select View Sessions.**



3. Once the View Sessions page opens, **select Create New Session**.



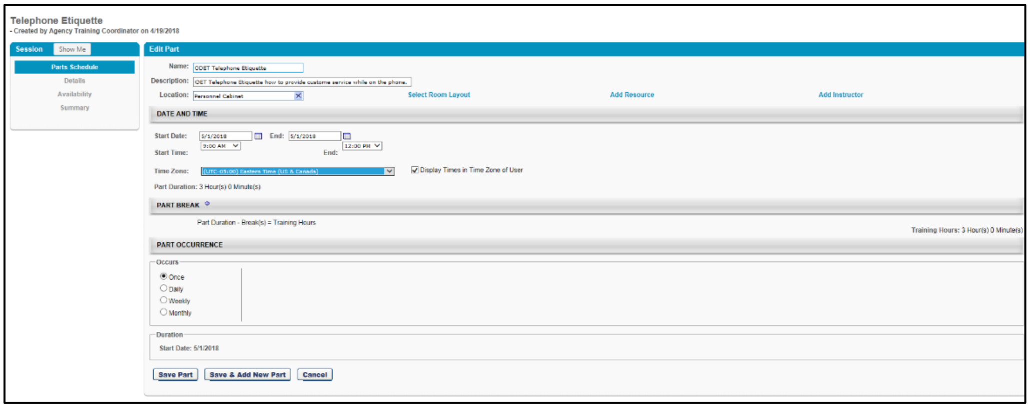
4. Under the section Parts, you will need to **enter the following information:**
   - Name
   - Description
   - Location
     - Users will need to search by the owner, using their cabinet abbreviation.



   - Start/End Date
   - Start/End Time
   - Time zone
   - **If the training that you are creating is a full day class, you must add a Part Break to account for the lunch break.**

Start and End Time MUST reflect the training hours on the EVENT.
Example if EVENT shows 8 hours, class must have start and end time that

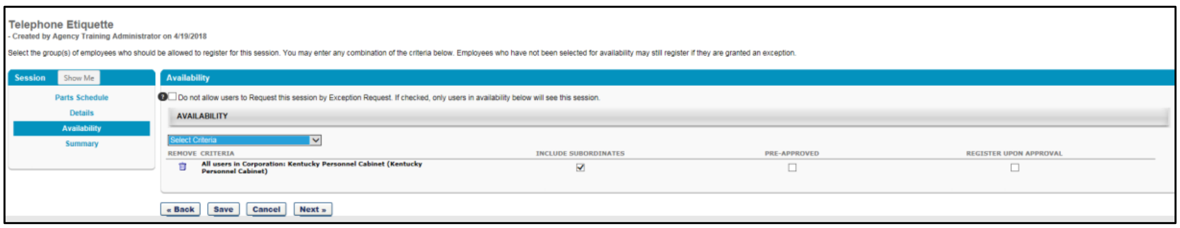
5. Occurrence **select Save Part.**



6. Once the Parts Schedule has been completed, **select Details.** This will be where the general details are entered for the session.
    - **Session ID-** the title that will be used to identify the session.
    - **Locator number-** is system generated and automatically populated.
    - **Credits-** the number of credits that is awarded for this session.
    - **Required Training Approvals-** this will be the number of approvals that are required. If left blank, it will default of the number of Required Training Approvals set in the user record.
    - **Required Completion Approvals-** this will be the number of the completion approvals that are required for the session to be marked as completed.
    - **Attendance-** this is the number of parts must be attended to be marked completed in the user's transcription.
    - **Minimum Registration-** this is the number of minimum participants for the session.
    - **Maximum Registration-** this is the number of maximum participants for the session.
    - **Waitlist-** be sure *Allow waitlist for sessions in this event* and *Auto-Register User upon Granting Waitlist* are checked.

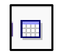
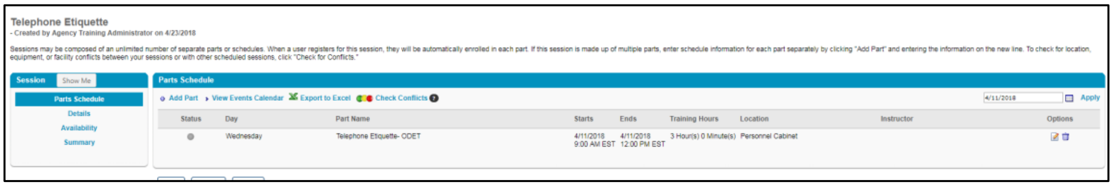
7. To set the availability use the **drop down menu Select Criteria** who will be able to register for this training. Once the availability has been selected, **select Add**.

    - **Organization- ODET Recommends using this selection to drill down from your cabinet.**
    - Position- DO NOT USE
    - Cost Center- DO NOT USE
    - Location- DO NOT USE
    - **Group- Must be set up by the Personnel Cabinet**
    - Job- DO NOT USE
    - Users- Requires that individual user names be selected
    - All Users- All Users Commonwealth Wide- DO NOT USE



8. The Summary Screen will go over the session details. If all details are correct, **select Save**.

Copying an ILT Session

1. **Navigate** from the My Purpose home page to **ILT > Manage Events and Sessions**.
2. **Locate the name** of the Event and **select the View Sessions icon**. 
3. Once the Session Screen has appeared find the session that you wish to copy. **Select the Copy Session Icon** 
4. The Parts Schedule will appear and, the settings for the ILT session will appear. **Change the date in the search box, select Apply**, this will create an exact duplicate of the session.
5. 

6. The Details Screen will appear, **enter the general settings**:
7. **Session ID-** a number that will be used to identify the session. Start date and agency abbreviation would be appropriate to use here.
8. **Locator number-** this is system generated and automatically populated.
9. **Credits-** the number of credits that is awarded for this session.
10. **Required Training Approvals-** this will be the number of approvals that are required. If left blank it will default of the number of Required Training Approvals set in the user record.
11. **Required Completion Approvals-** Enter the number of the completion approvals that are required for the session to be marked as completed.

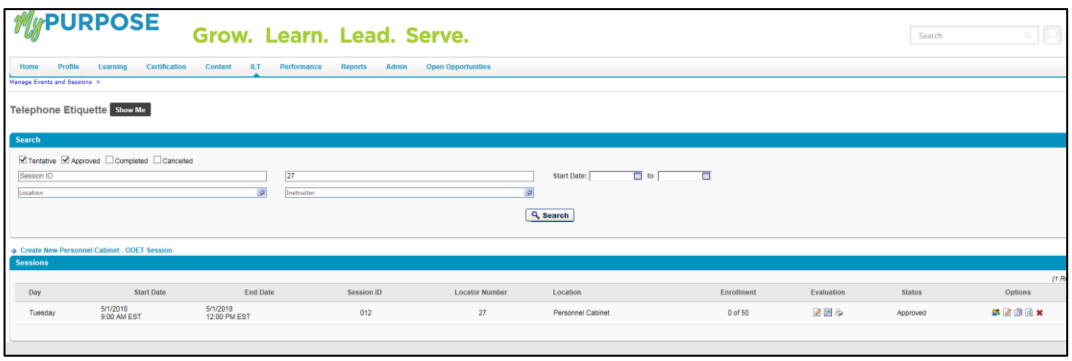
12. **Select Next**.
13. For Availability, **select the users** that will need to have access to this training.
14. **Select Next**.
15. The Summary screen will show an overview of the training. Here you will be able to view the general settings for the Session Copy.
16. **Select Save**.

Adding Users to Roster and Updating Status

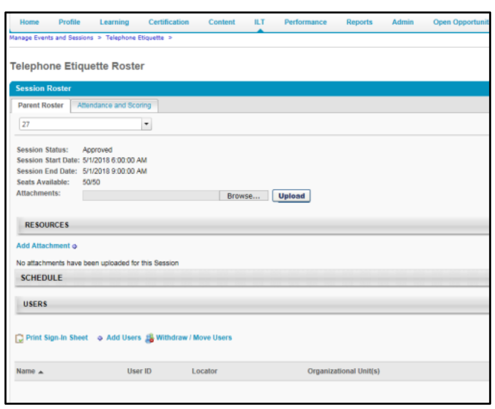
1. To add users to an ILT Event session, go to **ILT > Manage Events and Sessions**.

2. Search for the appropriate event and in the Options Column next to the event, **select View Sessions.**

3. To enroll users to the roster for an ILT Session**, select the Roster icon by the session details**.

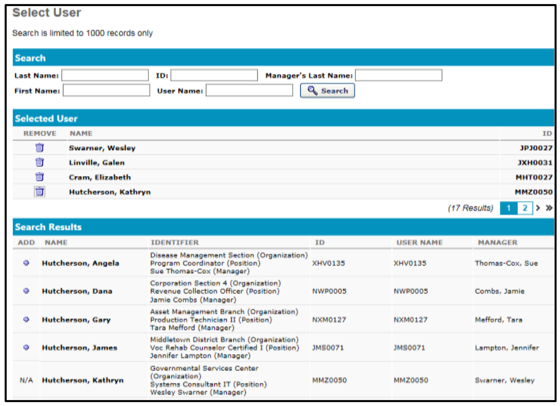


4. The roster screen will appear, from this screen **select Add Users**.



5. The Add Users screen will appear, a search can be done on the User Name or Manager's Last name. **To add a user, click the plus sign beside the name**. Multiple names can be added at once.

Please Note: If the instructor also needs to receive credit for the training, you must add them to the roster.



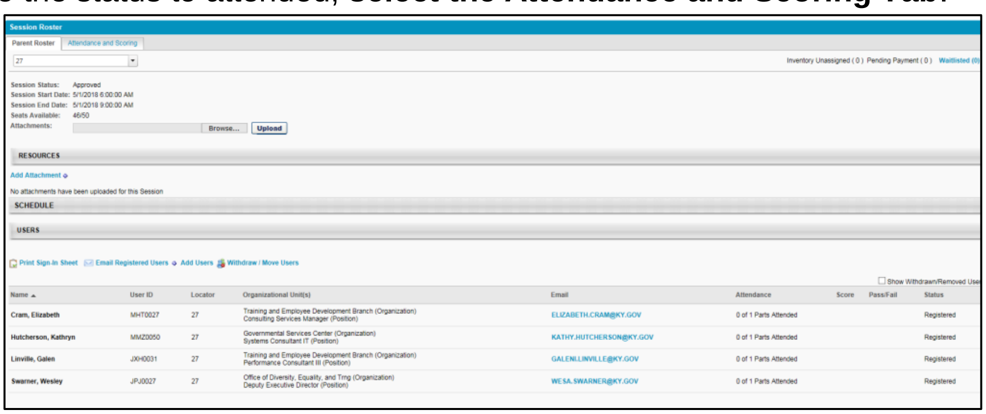
6. **Select Done**.

7. The users that have been added will then appear on the training roster with a pending status.

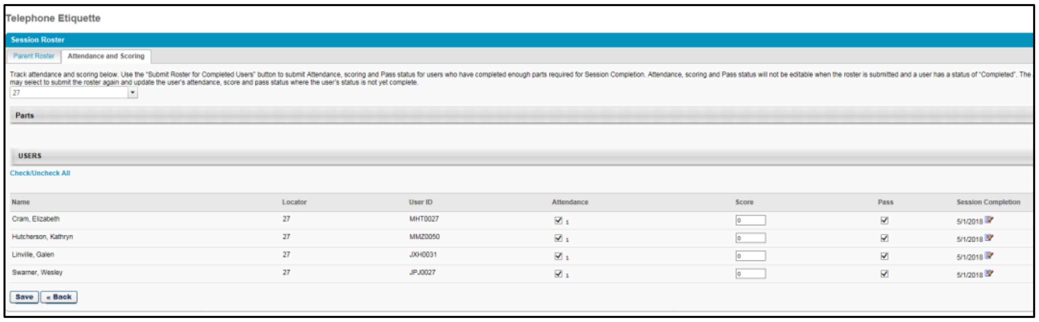
8. **Select Add Pending Users to the Roster- this will bypass manager approval. For ILT sessions that require managers approval, managers will need to log into their direct reports.**

9. The users will now show as registered.

10. To update the status to attended, **select the Attendance and Scoring Tab**.



11. Users will need to have Attendance marked and Passed marked. The completion date of the session can also be changed by using the pen and paper icon.



12. **Select Submit Roster**, the users status will now update and show that they have completed the training. Note-There is a 5-10 minute delay in the system before viewing the roster.

Manager Approval

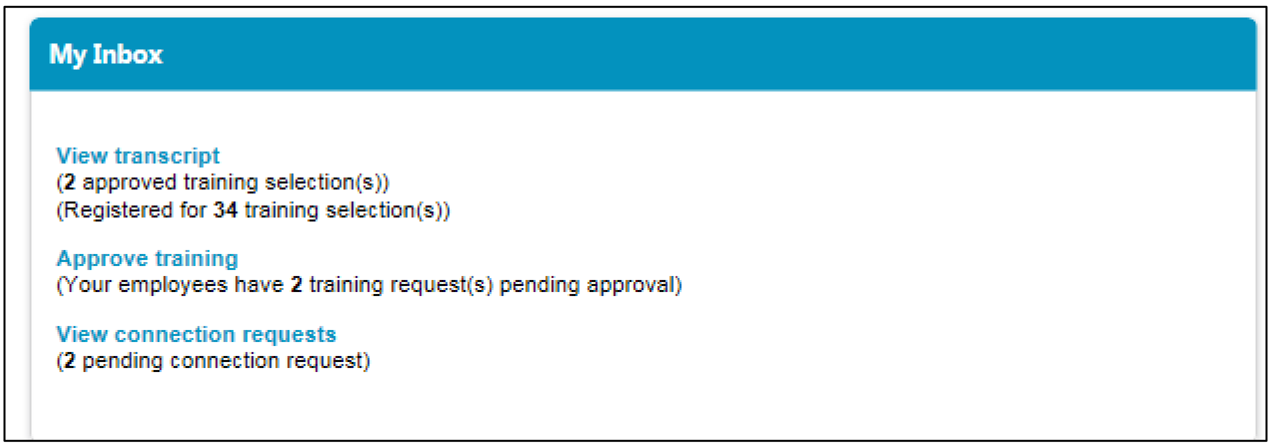
Approving Training Requests

Managers have the ability to approve or deny training request for employees. Approving the training request **MUST** be done in MYPURPOSE.

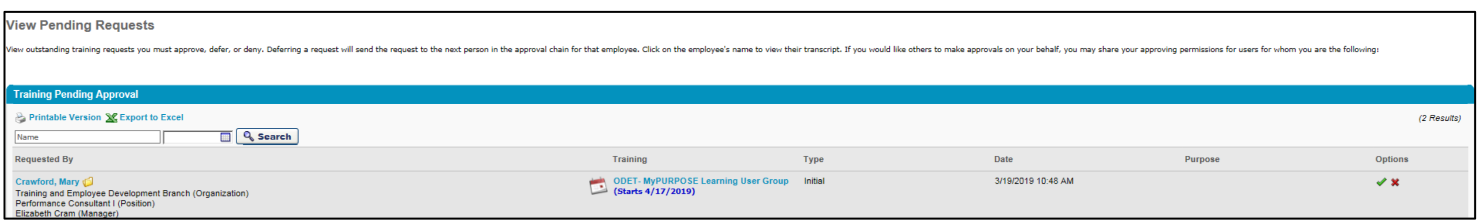
Training requests can be located in two locations in MyPURPOSE.

Dashboard widget

On the main MyPURPOSE homepage users will have access to the “Inbox.” The “Inbox” will provide managers a quick view of their training requests, as well as any training that has been requested by an employee.



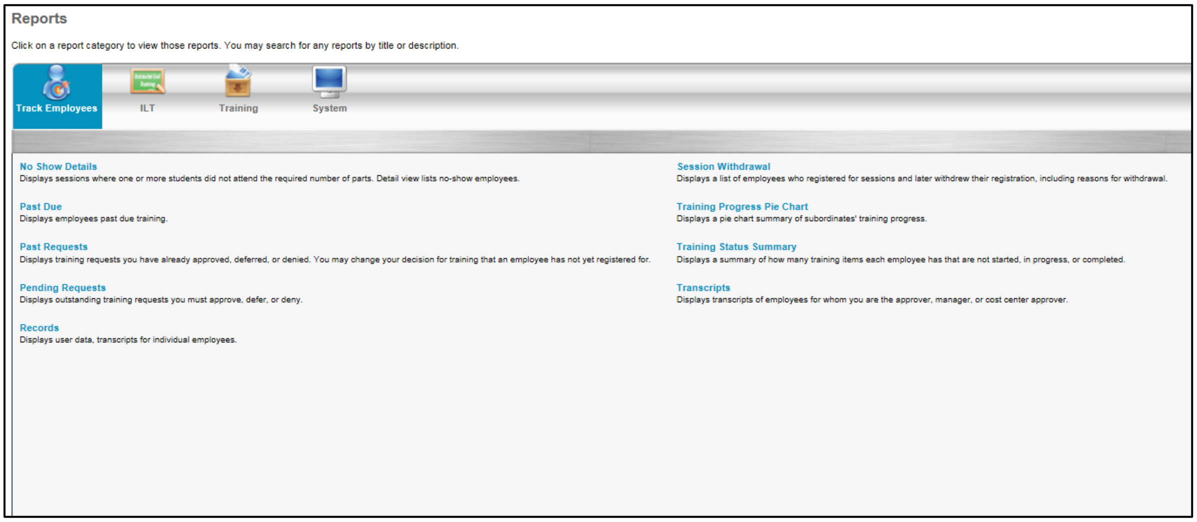
By selecting the “Approve Training” option managers will be taken to the “View Pending Requests” page. Here managers can select to approve or deny the request.



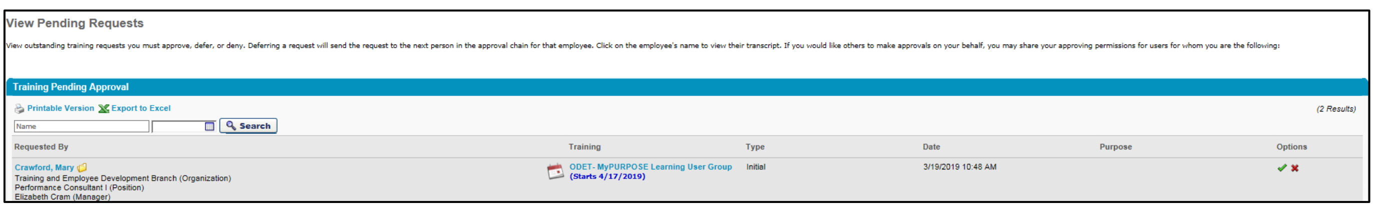
Standard Reports

If the training request does not appear on the widget on the homepage, the Manager may use the reports tab across the top of the screen. From the Reports tab Managers will need to select standard reports.

Once the standard reports screen opens, Managers will have the ability to select the report titled Pending Requests.



The pending request report will allow managers the ability to approve or deny training requests.

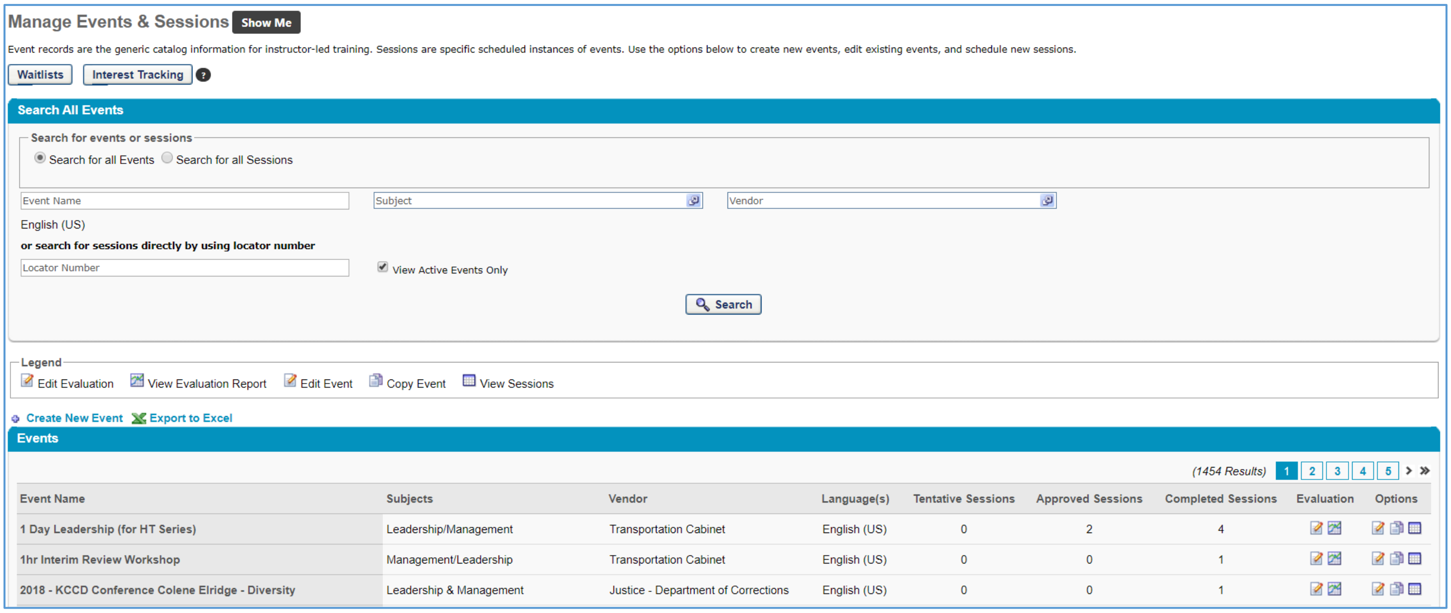


<u>External Training:</u> All users now have the quick link for adding External Training. The link can be found under the Learning Tab. Managers must approve all External Training that is entered, regardless if the training was entered by the Training Administrator or Coordinator. **Once the training has been approved by the manager the user must go back to the transcript and "Mark as Complete"**

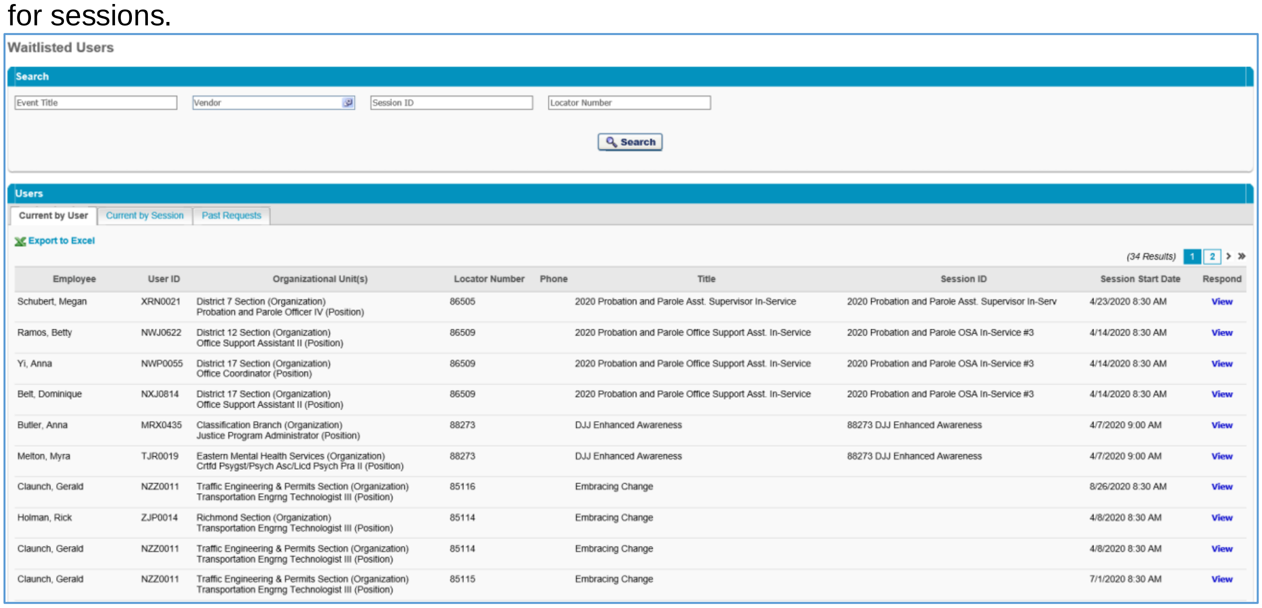
Viewing Interest and Waitlists

To view users that have Expressed Interest or that have been added to a Waitilst, administrators will need to access the manage events and sessions screen.

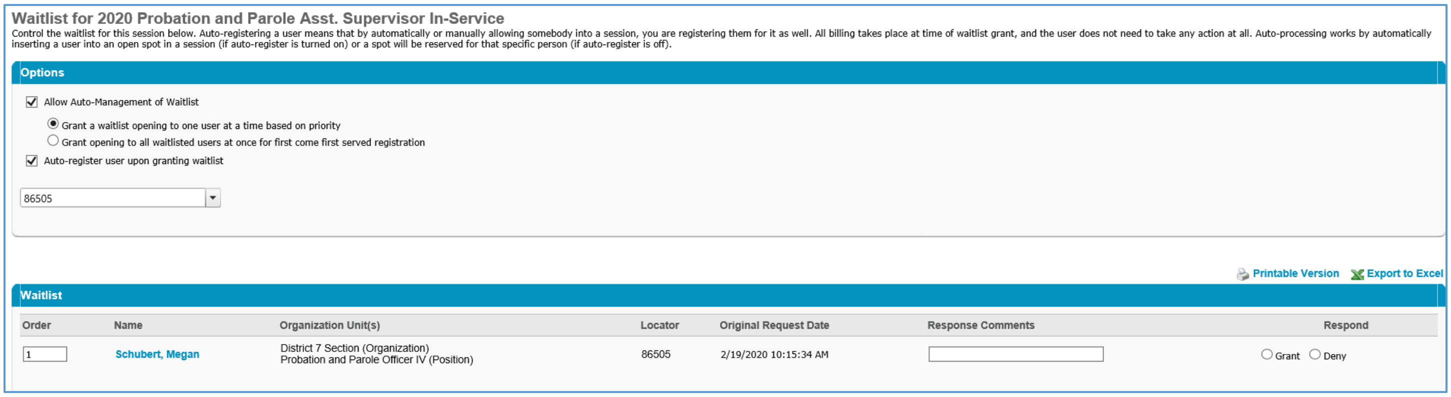
1. To do this select ILT>Manage Events and Sessions.
2. From the Manage Events and Sessions Screen select the view from the top left. For this example we will view the waitlists.



3. By selecting the waitlist option admins will be able to view users that have been added to the waitlists for sessions.



4. By selecting view under the Respond column this will give admins full access to the waitlist for the session. Here Admins will have the ability to grant an opening to the user. (PLEASE NOTE: Administrators should only do this for the courses that their provider owns)



5. Once the waitlist has been updated users will receive notification if they have been granted a seat.

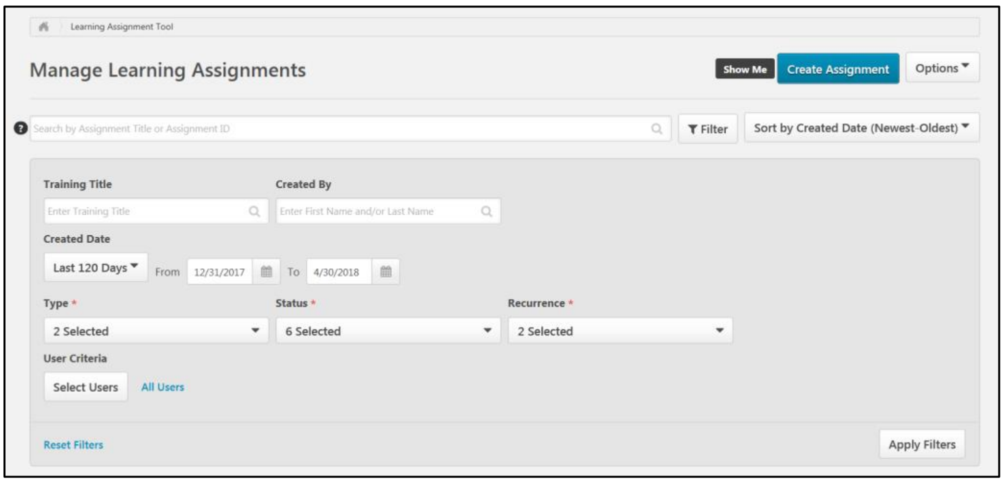
Learning Assignment Tool

The Learning Assignment Tool allows administrators to easily create learning assignments and deliver training to users, organizational units (OUs), and groups. Administrators can also track and manage assignments via the Manage Assignments Page, and view data related to specific assignments via the Assignment Summary page.

Administrators can create new learning assignments via the Learning Assignment Tool's Create Workflow to assign training to individuals or groups of users at one time.

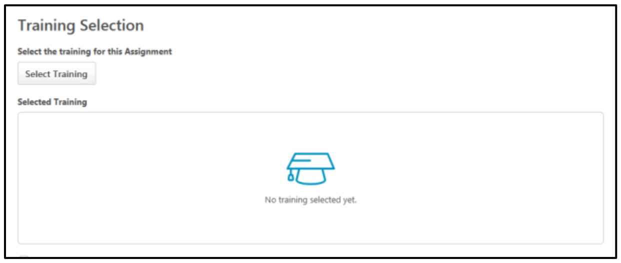
1. To begin creating a new learning assignment, **go to Admin > Tools > select the Learning Assignment Tool link**.

2. From the Manage Learning Assignments page, **select the Create Assignment button**.

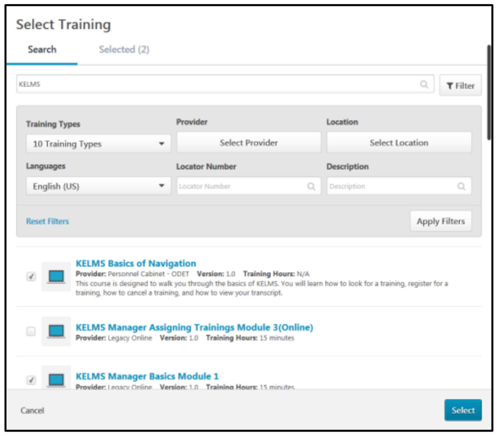


3. Enter a Title and Assignment Description.

4. Select “Select Training”.

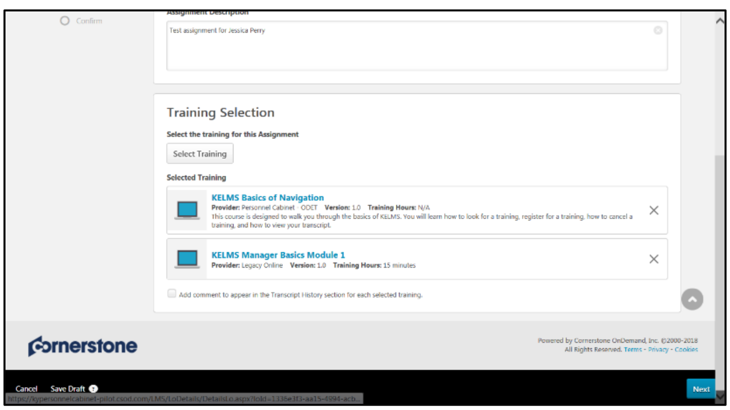


5. Select the training that will be a part of the assignment then **select "Select"**.



Note: You can select multiple trainings in the Select Training window.

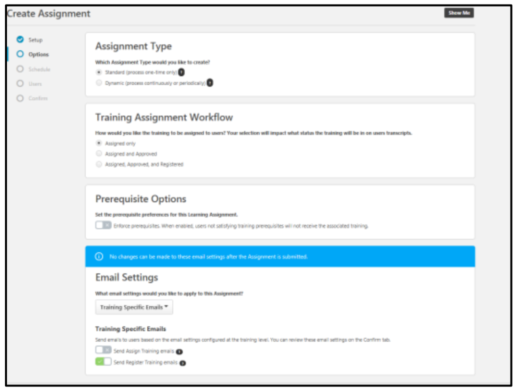
6. Click Next after Trainings have been selected.



7. Set the Assignment Type.

- **<u>Standard-</u>** This is a one-time assignment for the users who meet the defined criteria of the learning assignment. This assignment will process one time only.

- **<u>Dynamic-</u>** A dynamic learning assignment processes daily or one time per year and attempts to assign the learning objects to users who newly meet the criteria set for the assignment. Selecting this option causes a Dynamic Removal section to appear on the Options page.



8. The Training Assignment Workflow will allow you to determine how the user is assigned for training based on the following options.

    - **Assigned Only -** The training will only be assigned and may still require the user to receive approval and register for the training before they can take the training.

    - **Assigned and Approved -** The training will be automatically approved. No approval will be necessary before users are allowed to take the training, regardless of any configured approval workflows.

    - **Assigned, Approved, and Registered -** The training will be automatically approved and registered, regardless of any configured approval workflows. No approval and no registration will be required before the users are allowed to access the training. If selected, an additional option to bypass user payment appears:

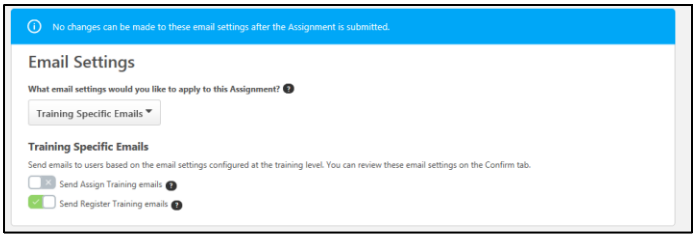
    - **Bypass User Payment -** Enabling this option prevents users from being prompted to pay for training. The training will be placed on their transcripts and no payment is needed from the user.

    - **Completed -** Only available when assigning a session which occurs in the past. The session will be added to users' transcripts in a status of Completed. If any other training items are being assigned with the session, this option is not available.

    - **Curricula with Auto-Registration -** If the assignment includes one or more curriculum, this option appears. This setting gives the administrator the ability to suppress Register Training emails that are configured for the training within the Curriculum that is set to auto-register when the user is registered for the curriculum.

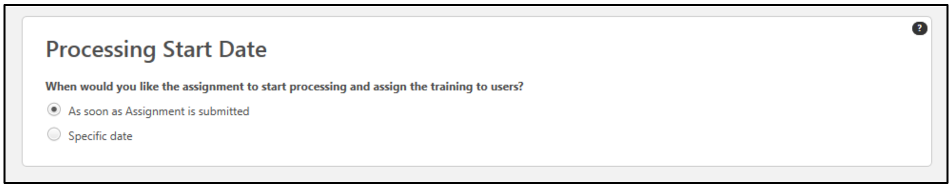
9. The Email Settings will allow the system generated emails to be sent to the users.
    - **Training Specific Emails -** This option uses the email settings configured at the individual training level (via Course Catalog).

- **No Emails -** This option suppresses all emails from firing for this learning assignment, no matter what emails are configured in Email Administration or for the LO type.



10. Select Next

11. The Processing date will allow you to start processing and assign training to users



- **As soon as assignment is submitted**, when selected, the assignment begins to process as soon as it is submitted, but users will not see the training on their transcript until they have met the specified relative criteria.

- **Specific date -** A date picker and time picker appear (if you have the appropriate permission), which allow you to select a specific future date and time, at which point the assignment will process.

- **Available processing start date options for assignments that process annually include:**

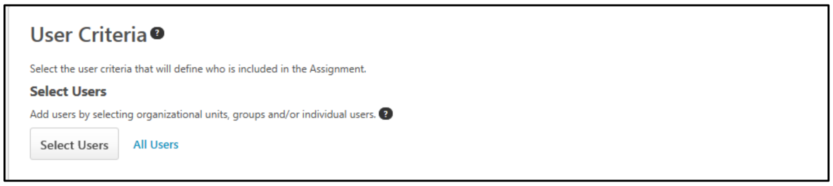
When would you like the assignment to start processing and assign training to users? - Using the date picker and time picker, select a date and time at which the assignment will begin to process. The assignment will process annually on this date and time.

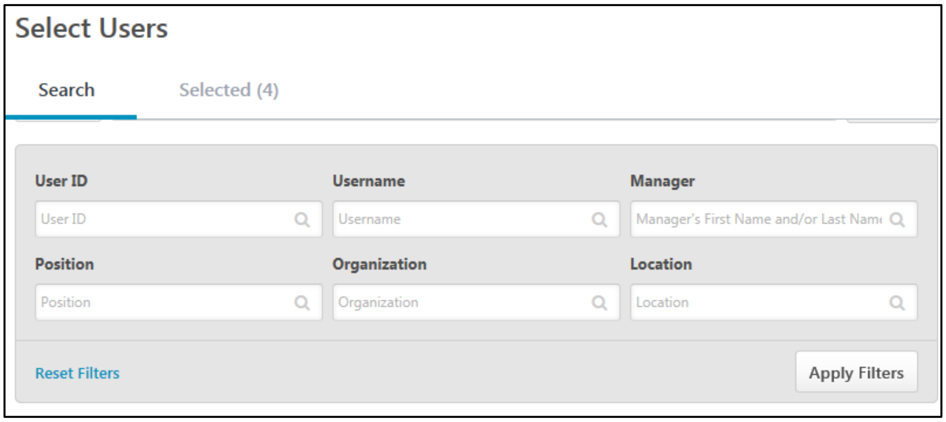
12. The training start date will allow administrators the ability to determine when the training will start.

13. A training due date can be set if there is a specific time frame in which the training must be completed.

14. **Select Next**.

15. User Criteria will allow the admin to select the users that the training will be assigned to. **Select "Select Users".**





16. Once the users have been selected **select "select."**
17. At the bottom of the page **select next**.
18. The confirm page will go over all of the basic settings for the assignment. If this is correct, **select Submit**. The assignment has been created.

Learning Assignment Best Practices

LEARNING ASSIGNMENT BEST PRACTICES

- **Step by Step instructions can be found in training manuals for both Administrators and Coordinators.**

- Employees should be in the system self-registering for trainings, and managers have the ability to assign training you employees. Learning assignments should not be something that is a habit to enroll users in the system.
  - Learning assignments cannot be edited once they have processed, nor can they be deleted.
- Please select users cautiously, most Coordinators and Administrators have the ability to see everyone throughout the state.
- Learning Assignments have two different types.

  - **Standard-** This is a one-time assignment for the users who meet the defined criteria of the learning assignment. This assignment will process one time only. Best used for training that needs to be assigned to users one time. **Best used for New Employee Trainings.**

  - **Dynamic-** A dynamic learning assignment processes daily or one time per year and attempts to assign the learning objects to users who newly meet the criteria set for the assignment. Selecting this option causes a Dynamic Removal section to appear on the Options page. Best used for capturing any new user in the system for automatic registration.

- Be aware that through the Learning Assignment tool, Administrators and Coordinators have the ability to bypass manager approval. There are several different workflows that you can choose from.
  - **Assigned Only -** The training will only be assigned and WILL still require the user to receive approval and register for the training before they can take the training.

  - **Assigned and Approved -** The training will be automatically approved. No approval will be necessary before users are allowed to take the training, regardless of any configured approval workflows. Users will still have to go out and select the session that they want to attend.
  - **Assigned, Approved, and Registered -** The training will be automatically approved and registered, regardless of any configured approval workflows. No approval and no registration will be required before the users are allowed to access the training.

- Learning Assignments have a processing delay. While the assignment is processing the training will not be immediately available to the end user. The processing time takes up to ten minutes.

Running a Standard Report

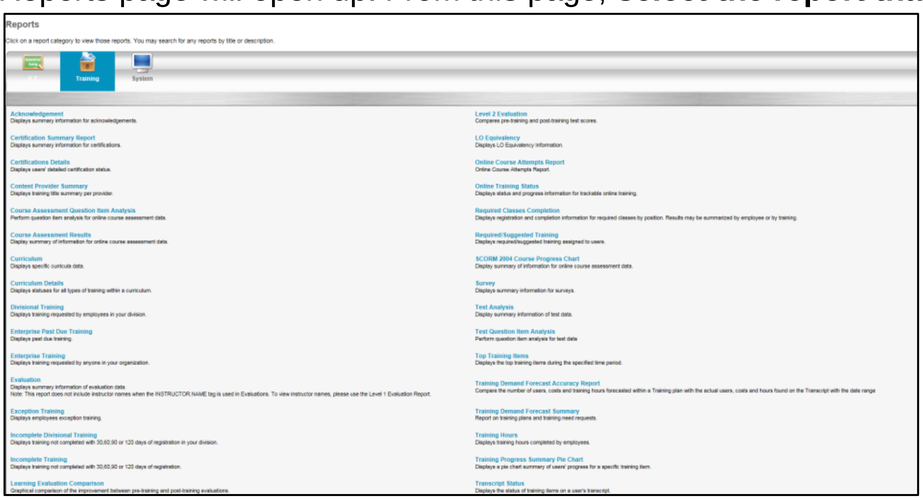
Standard Reports allow Training Admins to gather general information regarding training data. The Standard Reporting Tool will allow you to create, run and schedule reports to view agency progress.

To use a Standard Report. It is important to know how to use filters and parameters to retrieve the needed information. Filters will allow you to select the information that is needed for the report Parameters will further define the information that pulls back.

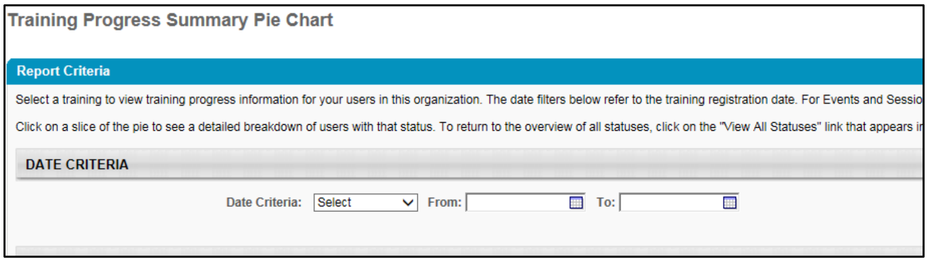
- MyPurpose offers a variety of standard reports, these reports are out of the box from the vendor. We do not have the ability to add fields to these reports.
- All reports run on the criteria as follows, Date Range, User Criteria, and Training Selection. Below you will find a listing of some of the Reports that are recommended for user. The report titles that are highlighted are

1. From your My Purpose main page, **hover over Reports**.
2. **Select Standard Reports**.

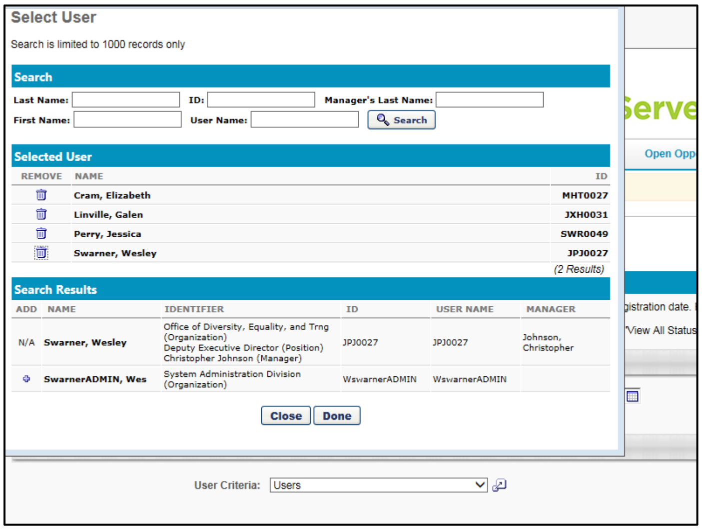
3. The Reports page will open up. From this page, **select the report that is desired**.



4. For each selected report the filters will show. For the example below: The Training Progress Summary Pie Chart:

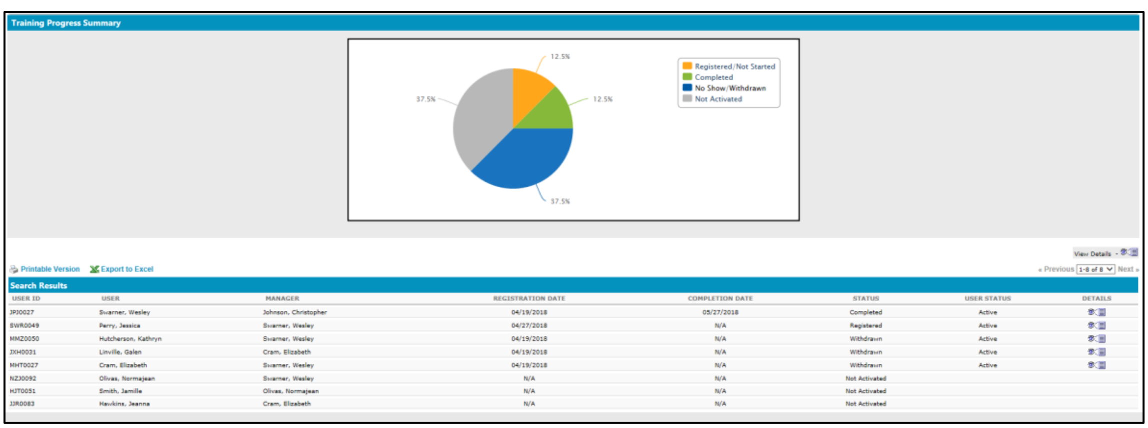


5. The advanced filters will further define the information that the report is pulling. Under users you can select which users to pull the report for. Once the users have been selected **click done**.



Under the advanced filters, the training title can also be selected. Once the filters have been set, **select Search.**

6. The pie chart will show and give a breakdown of the registrations. **By selecting in the pie chart fields**, you will get a more specific overview of the Progress of users.

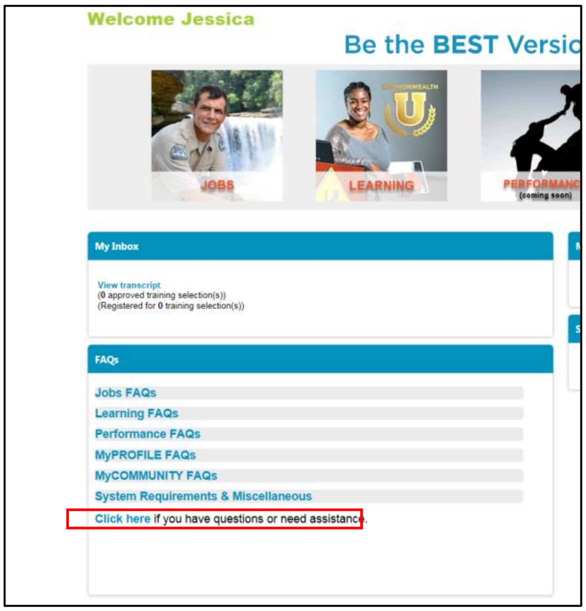


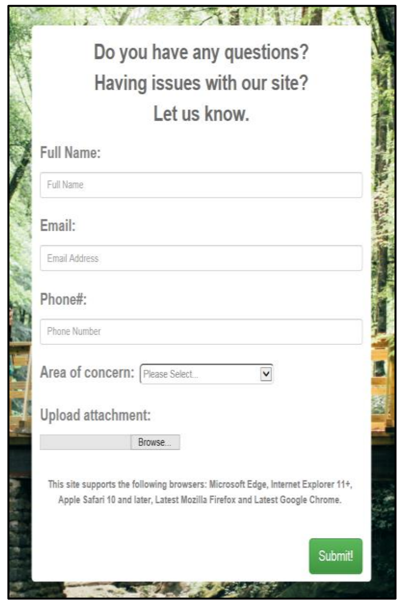
NOTE: The Standard Reports should provide information on any Learning Object in the system. By filling out the required filters, a comprehensive overview of user activity will show.

TFS Tickets

Training Administrators are the first point of contact for Training Coordinators, and users at agencies

- The TFS ticket system is designed to allow users to report any technical issue that they may have while in the system.
- TFS tickets should not be logged for agency specific questions. These questions should be fielded by coordinators and administrators.
- TFS site can be accessed through MyPurpose. Once the TFS Site has populated, users are encouraged to provide as much detail as possible regarding the issue they are experiencing.





KENTUCKY PERSONNEL CABINET

Office of Diversity, Equality, & Training