complyND✓

Training Management User Guide
For Trainees

University of Notre Dame
May 2015

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For more information, see **comply.nd.edu**

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Common Functions 1

This section contains information on accessing assignments through the **My Tasks** menu and navigation in the system.

Accessing Assignments through My Tasks Menu

To access the required Training Management content for review:

Step 1 Click the My Tasks menu at the top of the Training Management application home page.

A list of assignments appears.

NOTE: In the Training Management module of complyND applications, in addition to accessing event assignments through **My Tasks** menu, you can also access them from the assigned tabs.

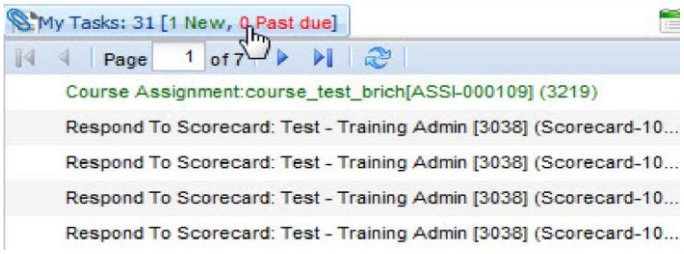

Figure 1: My Tasks Menu

An event assignment may appear as:

- New assignments (links appear in **green**)
- Assignments that are older than five days (links appear in **black**)
- Assignments that are past due (links appear in **red**)

Step 2 Click the required assignment link. The relevant form appears. You can review the content, as applicable, and submit the form.

My Tasks Menu Features

The following table describes the options available in the **My Tasks** menu:

Click the Icon	To . . .
	Navigate to the next page. **NOTE:** If you navigate to the last page, this icon is disabled.
	Navigate to the last page. **NOTE:** If you navigate to the last page, this icon is disabled.
	Navigate to the previous page. **NOTE:** If you navigate to the first page, this icon is disabled.
	Navigate to the first page. **NOTE:** If you navigate to the first page, this icon is disabled.
	Refresh the page and see the latest assignments. **NOTE:** To see the latest data, refresh the **My Tasks** menu periodically.

Form Toolbar

The forms available in the Training Management module of complyND include a common toolbar which consists of a set of icons to perform certain actions. The table below provides a list of toolbar icons and their descriptions.

NOTE: These are the standard form toolbar icons available across all complyND forms. However, every icon may not be available in all the forms. The display of these icons is customized based on the function and usage of the form.

Icon	Click the Icon to . . .
Submit	Submit the contents of the form and route to the next workflow step based on the action selected.
Save Draft	Save the contents of the form as a working draft for the user without processing it to the next workflow step and keep the form open.
Save Draft & Close	Save the contents of the form as a working draft for the user without processing it to the next workflow step and close the form. **NOTE:** You can access the form from **My Tasks** at a later time and continue working.
Cancel	Discard changes made to the form and close it.

Mandatory Fields

While working on the Training Management forms, you will see certain fields marked with a red asterisk *. The red asterisk indicates that the field requires a mandatory input. If you click the **Submit** icon without providing input in all of the mandatory fields, the application displays an alert message at the top of the form. To submit the form, you must fill in the mandatory fields.

Figure 2: Sample Mandatory Field

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Completing Training Courses 2

This chapter provides information on completing the courses, providing course completion feedback, and responding to course test questionnaires.

Completing Courses

After the curriculum is published, based on the schedule, the appropriate courses are assigned to the trainees. You can view the courses that you need to complete using the **My Trainings** report.
The following are the various course assignment types:

- **Instructor-Led**: When you have been added to an ILT session by the Training Admin or supervisor, the status of your assignment changes to "Scheduled" in **My Training** report. When you have completed the course, the status for the assignment of ILT changes to "Complete". In you miss the class, the status changes to "Not Started". Once the course is completed, the assignment is unavailable in the **My Trainings** report and the course details are displayed in the **Course Completion Report**. If there is a **Test** or **Course Feedback Questionnaire**, it will be assigned to you.

- **Media-Based**: You can complete the course clicking on **Start** link in the **My Training** report. After completing the course, you can attach files, provide comments, and specify whether or not to provide feedback on the course. Once the course is completed, the assignment is unavailable in the **My Trainings** report and the course details are displayed in the **Course Completion Report**.

- **Hands-on**: You can access the **Course Assignment** form by clicking on **Start** link in the **My Training** report. After completing hands-on training you can use this form to specify the details of the course completion, attach relevant documents, and provide comments regarding the learning. After the course is completed, the assignment is unavailable in the **My Trainings** report and the course details are displayed in the **Course Completion Report**.

- **Self-paced**: You can access a self-paced by clicking on **Start** link in the **My Training** report. The link to view the training is available in the **Course Assignment** form. You can view any other documents and links required to complete the course. The score and result of the course is displayed in the **Course Completion** report. After completing and submitting the course, the assignment is unavailable in the **My Trainings** report and the course details are displayed in the **Course Completion** report.

For all the above course types, you may be provided with the option to provide course feedback.

Navigation

To access the **Course Assignment** form, perform the following steps:

Step 1 Navigate to the **Training** tab>> **My Trainings** tab >> **My Trainings.**

Step 2 Click the **Start** link in the **Actions** column.

Figure 3: Accessing Course Assignment Form

NOTE: The **Start** link is available only for those assignments whose status is **Not Started**.

Step 3 "Generating Course Assignment, please wait . . .." message appears. The **Course Assignment** form is generated and displayed.

NOTE: After the course assignment is generated, the status of the assignment changes to **In Progress** and the **Start** link is unavailable.

Step 4 If you want to access the **Course Assignment** form again, click the course name in the course column or access the assignment from the **My Tasks** menu available at the top of the home page.

Course Assignment Form

Use the **Course Assignment** form to access the course content and complete the course. The **Course Assignment** form varies based on the type of course.

Figure 4: Course Assignment Form > Computer-Based Course Type

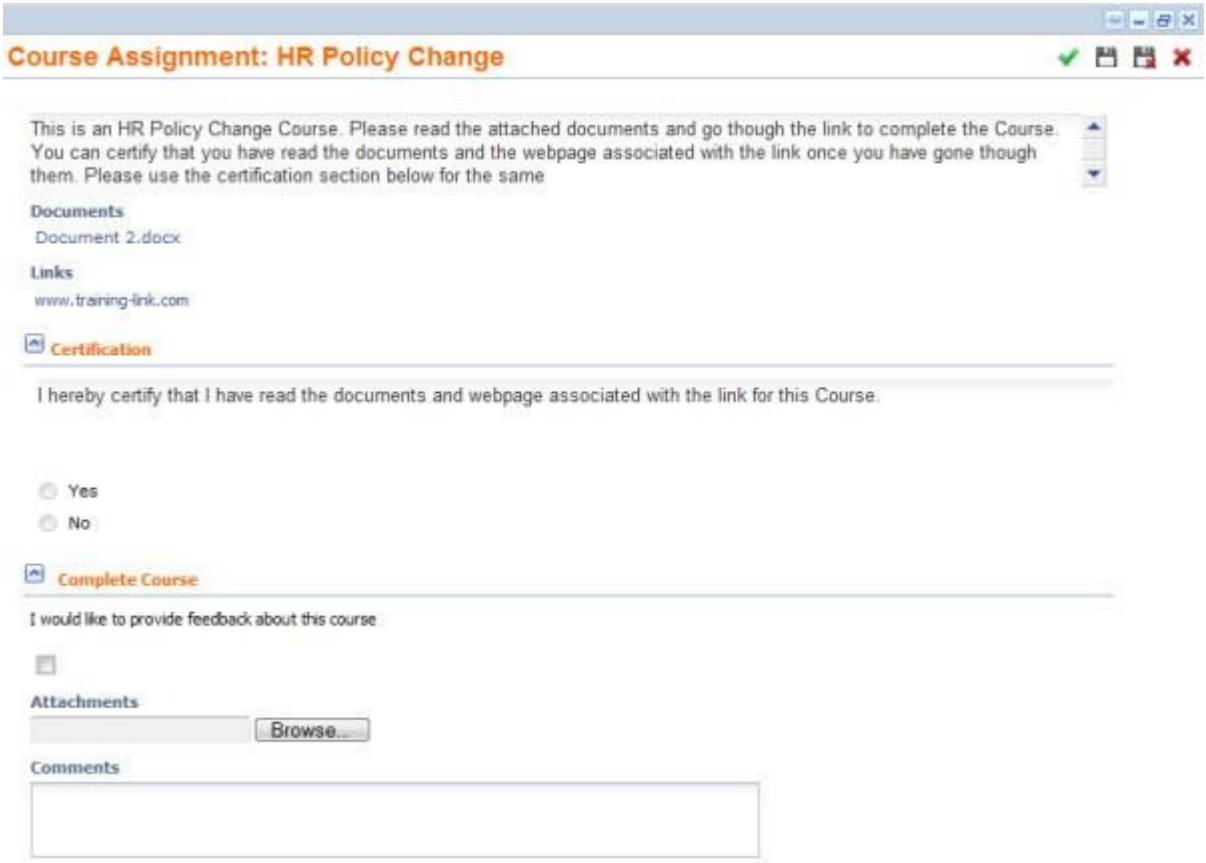


Figure 5: Course Assignment Form > Media Based Course Type

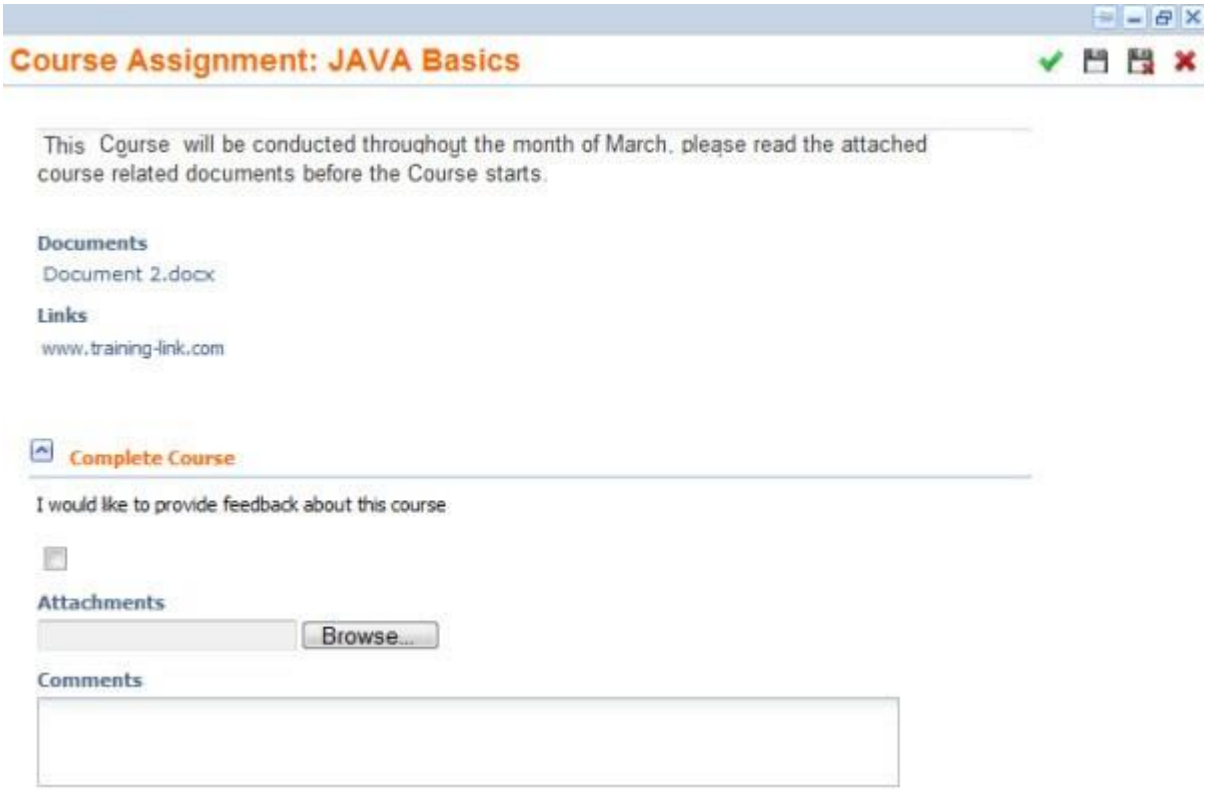


Figure 6: Course Assignment Form > Hands-on Course Type

Figure 7: Course Assignment Form > Instructor-Led Training Type

Field/List Name	Description
Instructions (read-only)	This field displays the instructions or guidelines that you need to follow to complete the current course. The information in this field is displayed based on the details entered while creating the course.
The following three fields appear only for Instructor-Led training courses and these fields are made available only after the training is scheduled using the **Instructor-Led Training** form.	
Field/List Name	**Description**
Date Time (read-only)	The date and time when the training course is scheduled appears.
Venue (read-only)	The location where the training course is scheduled appears.
Instructor (read-only)	The name of the instructor who is conducting the training course appears.
The following field appears only for a computer-based training course type. You need to click the link to view and complete the course.	
Field/List Name	**Description**
Launch Course link	A link is available below the text “Initiate the Training by clicking on the link below”. Clicking this link opens the computer-based course. When the link is clicked, the course appears in the new IE window. The following figure depicts the course opened in browser window.

	 **NOTE:** For computer-based courses, only **Cancel** icon is available in the form toolbar.

The following fields are available for media-based, hands-on, and self-paced course types. These fields appear only for self-reporting of Score/Grace enabled courses. This set up is done while creating the courses.	
Field/List Name	**Description**
Score	The trainee uses this field to type the score for a particular course achieved by completing a media-based or hands-on course. **NOTE:** You can enter any positive number in this field.
Grade	The trainee uses this field to type the grade for a particular course achieved by completing a media-based or hands-on course. ***NOTE:*** *You can enter any alphanumeric value in this field.*

The following fields are available for all types of courses.	
Field/List Name	**Description**
Documents	Any documents needed for the course are listed here. To download a document: 1. Click the document name. The **File Download** dialog box appears in the lower left corner of the screen. 2. Click the **Open** button to open the document. **NOTE:** You can save the document by clicking the **Save** button. To cancel the document download, click the **Cancel** button.
Links	Links provide access to external links used for the course. After you click this link, the related web page appears in a new window.

Certification This section appears only if the certification text is added while defining the course.	
Field/List Name	**Description**
Yes or No options	This option allows you to self-certify that you have completed a course. ● **Yes**: If you want to self-certify after completing the course, select this option. ● **No**: If you do not want to self-certify after completing the course, select this option. **NOTE:** You can click these links only after you click the documents and/or reference links provided for the course.
Field/List Name	**Description**
Course Feedback check box (appears only if the course feedback is associated for the course)	You can use this field to indicate whether or not you want to provide the course feedback. **NOTE:** The **Course Feedback** is assigned to you after submitting the **Course Assignment** form. If you do not want to receive the **Course Feedback** assignment and provide feedback for the course, this check box must be cleared.
Attachments	You can use this field to attach the documents related to course certification. To attach a file: 1. Click the **Browse…** button. 2. Select the file from your local drive. The file is attached, and the name of the file attached appears. To delete an attached file, click the **Delete** icon on the right side of the attached file.
Comments	Type the comments regarding the course.

Form Submission

To submit the current form, be sure to click the **Submit** icon.

Task Assignments and E-Mail Notifications

After you submit the current form, the following task assignments and e-mail notifications are generated if you agree to provide feedback or if a test is associate with the course.

Assigned to . . .	When you Select the Option . . .	Form Assigned	E-Mail Sent to . . .
Trainees	**Course Feedback** check box in the **Course Assignment** form	Respond To questionnaire (course feedback questionnaire)	Trainees
Trainees	Not applicable	Respond To Questionnaire (Test Questionnaire)	Trainees

Responding to Course Feedback and Tests

After you complete the course, any associated test questionnaires and/or course feedback will be assigned to you.

Navigation

To access the **Course Test/Course Feedback** form, perform the following steps:

Step 1 Navigate to the **Trainings** tab >> **My Trainings** >> **Pending Tests/Pending Course Feedback**.

NOTE: You can access the Course Feedback from **Pending Course Feedback** and the Course Test from **Pending Tests**, respectively.

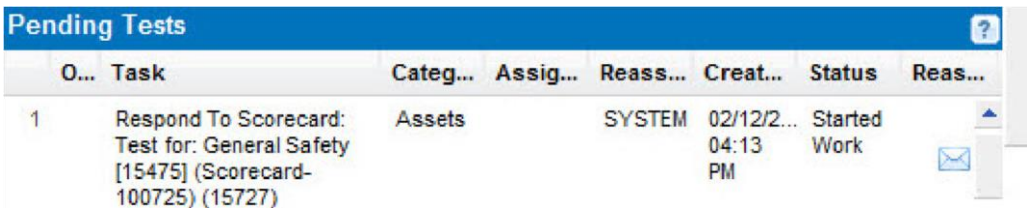


Figure 8: Accessing Test Response Form

Step 2 Click the **Respond To Survey: Test / Respond To Survey: Feedback - <User Name> [Pending Test ID] [Survey-Survey ID>] (PID)**

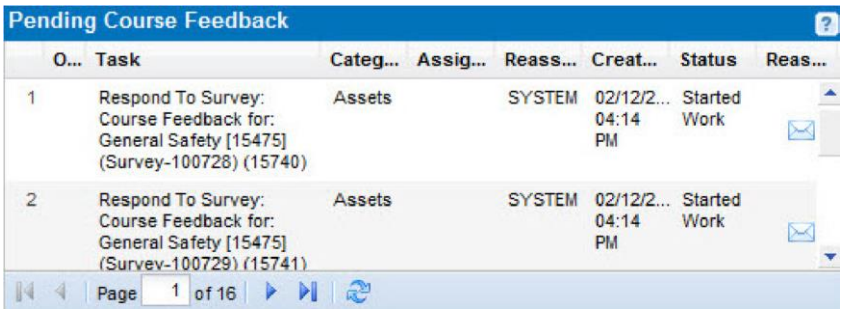


Figure 9: Accessing Course Feedback Form

NOTE: Alternatively, you can access form the **My Tasks** menu at the top of the home page.

Course Test Form

Use the **Course Test** form is used to answer the questions related to the course completed.

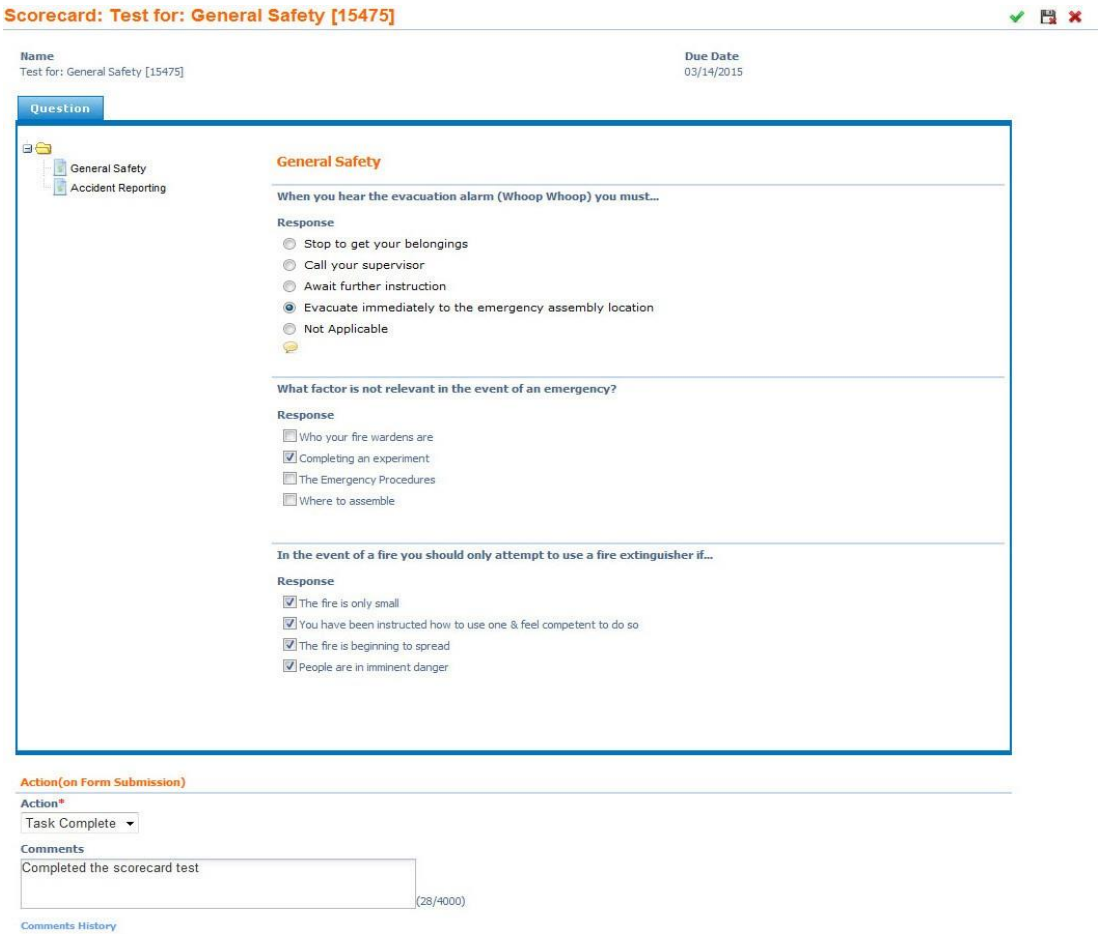


Figure 10: Course Test Form

Course Feedback Form

Providing feedback on a course is an optional process. If you agree to provide feedback when submitting the course, you will use the **Course Feedback** form to respond to the feedback questions associated with that course.

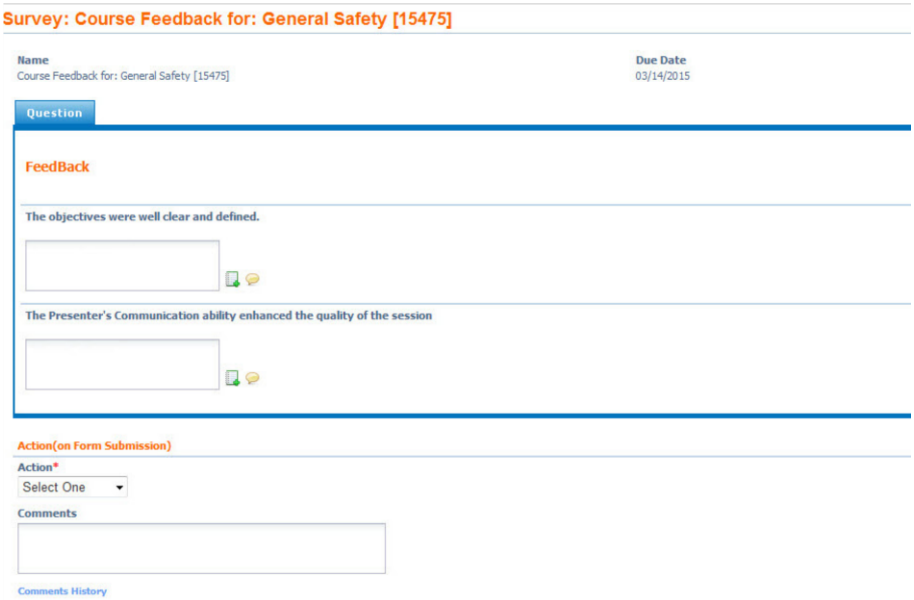


Figure 11: Course Feedback Form

Course Test / Feedback Form > Header Section

Use the header section to view the due date details.

Figure 12: Course Test / Feedback Form > Header Section

Course Test/Feedback Form > Question Tab

Use the **Questions** tab to respond to the questions of a test/feedback. If the questions are mandatory you must answer all the questions. The optional questions do not have to be answered in order to complete the test. The questionnaire may contain the conditional questions, which appears based on the response provided for certain questions. The conditional questions are displayed below the main question in this tab. You can provide comments for each question in this tab.

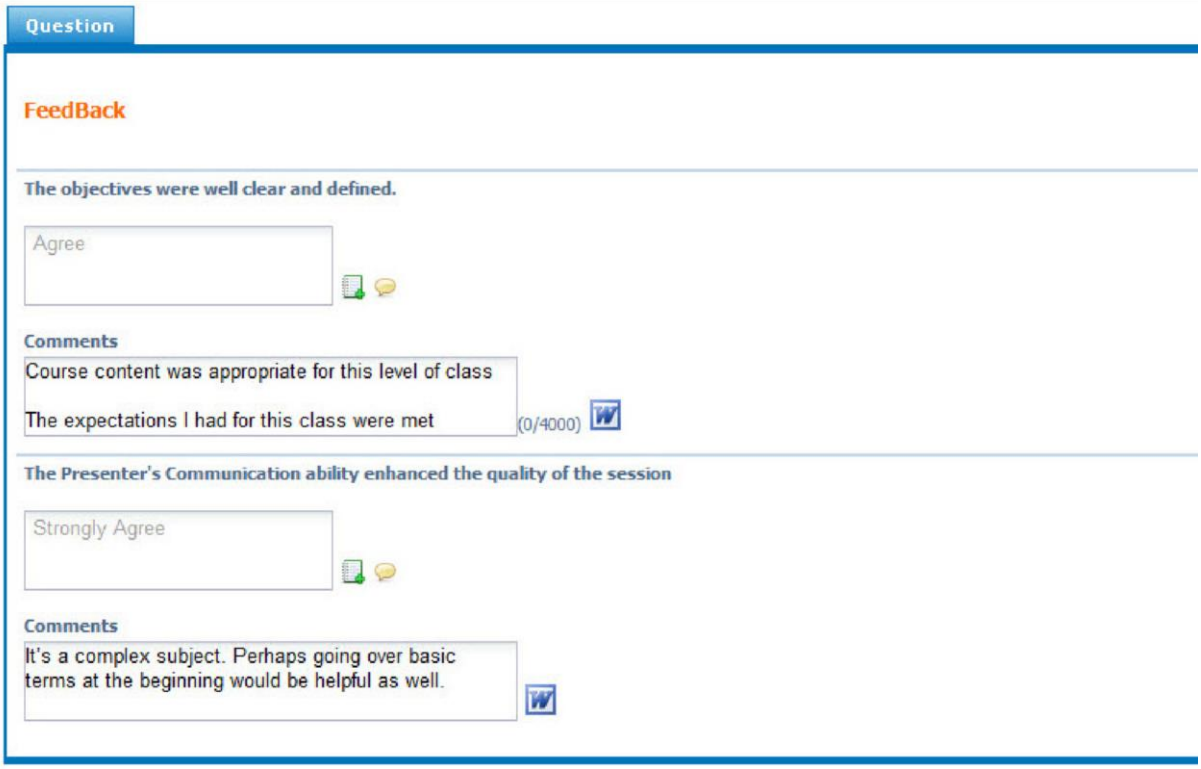


Figure 13: Course Test/Feedback Form > Question Tab

Course Test/Feedback Form > Action (on Form Submission) Section

Use the Action (on Form Submission) section to take action on the current form.

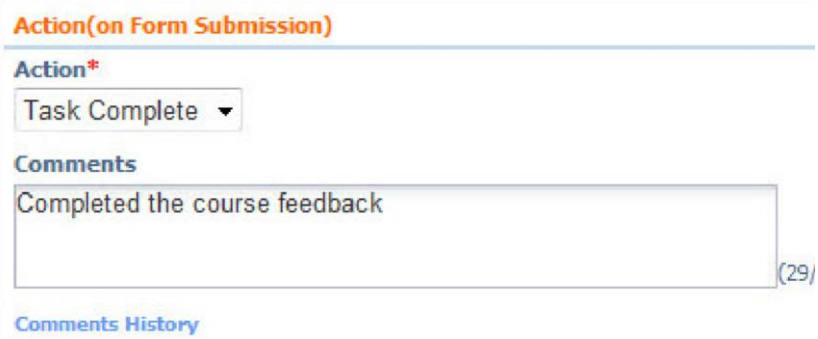


Figure 14: Course Test/Feedback Form > Action (on Form Submission) Section

Action (on Form Submission) In this section, you can provide your recommended action on the current form.	
Field/List Name	**Description**
Action	The following action is available in the Course Test/Feedback form: **Task Complete**: To submit the completed form, select this option.

	****NOTE: This is a required action. The form cannot be submitted until this option is selected.**
Comments	Enter comments regarding the test or feedback. After you submit the form, the **Comments History** report is updated with your comments.

Form Submission

To take action on the current form, click the **Submit** icon.

Task Assignments and E-Mail Notifications

After you submit the current form, no task assignments or e-mail notifications are generated.

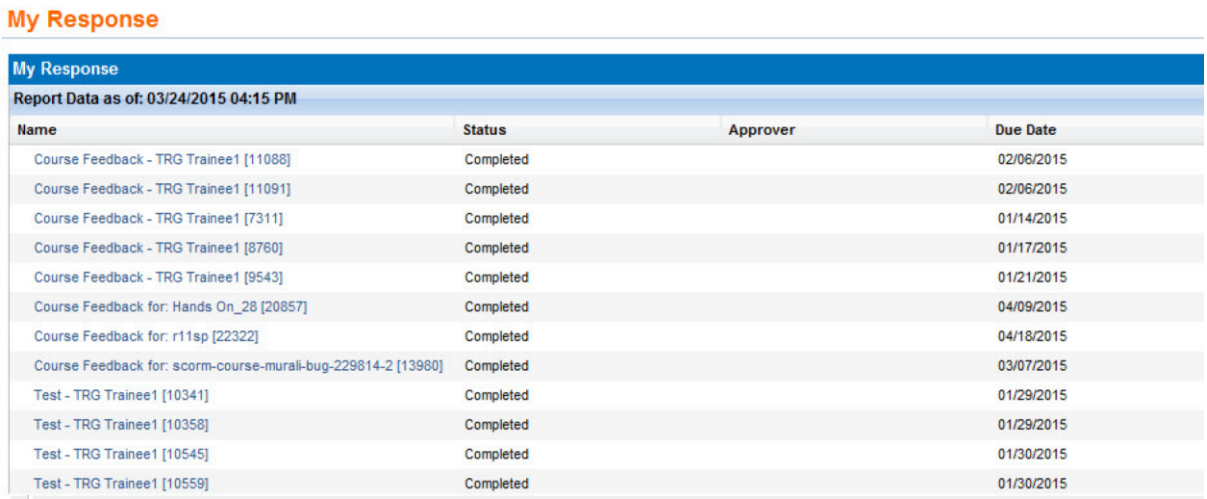
Viewing Course Feedback and Test Response

The trainees can view the response report of the course feedback and test.

Navigation

To view the **Course Feedback** and **Test Response**, perform the following steps:

Step 1 Navigate to the **Response** >> **My Response** >> **My Response**.



My Response

My Response

Report Data as of: 03/24/2015 04:15 PM

Name	Status	Approver	Due Date
Course Feedback - TRG Trainee1 [11088]	Completed		02/06/2015
Course Feedback - TRG Trainee1 [11091]	Completed		02/06/2015
Course Feedback - TRG Trainee1 [7311]	Completed		01/14/2015
Course Feedback - TRG Trainee1 [8760]	Completed		01/17/2015
Course Feedback - TRG Trainee1 [9543]	Completed		01/21/2015
Course Feedback for: Hands On_28 [20857]	Completed		04/09/2015
Course Feedback for: r11sp [22322]	Completed		04/18/2015
Course Feedback for: scorm-course-murali-bug-229814-2 [13980]	Completed		03/07/2015
Test - TRG Trainee1 [10341]	Completed		01/29/2015
Test - TRG Trainee1 [10358]	Completed		01/29/2015
Test - TRG Trainee1 [10545]	Completed		01/30/2015
Test - TRG Trainee1 [10559]	Completed		01/30/2015

Figure 15: Viewing Course Feedback and Test Response

NOTE: On responding to both the Test and Survey, the assignments no longer appear in the **My Tasks**, **Pending Course Feedback** or **Pending Tests**.

My Trainings Report

The **My Trainings** report displays the details of all the courses that are assigned to the logged-in user.

My Trainings

Course	Type	Mandatory	Due Date	Curriculum/Adhoc	Status	Actions
Oracle SQL PLSQL	Instructor Led	No	Nov-15-2014	Oracle Skills	Not Started	
Oracle SQL PLSQL	Instructor Led	No	Dec-16-2014	Oracle Skills	Not Started	
LAB Safety	Instructor Led	No	Jan-09-2015	Curriculum for Lab safety	Not Started	
Campus safety	Instructor Led	No	Jan-09-2015	curriculum for safety	Not Started	
Software Testing course	Instructor Led	No	Jan-11-2015	Curriculum for the year 2015	Not Started	
Software Testing Course(Me...	Media Based	No	Jan-11-2015	Curriculum for the year 2015	In Progress	
Oracle SQL PLSQL	Instructor Led	No	Jan-16-2015	Oracle Skills	Not Started	
Email Course	Instructor Led	No		Email Curriculum	Not Started	
Sample Course - Jitu-ILT	Instructor Led	Yes		Sample Curiculm Jitu - ILT	Not Started	
Course- Jitu	On The Job	Yes		Sample Curiculm Jitu - ILT	Not Started	

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Figure 16: My Trainings Report

You can expand each row and view the description of the course. To expand a row, click the **Expand** icon next to the row that you want to expand.

NOTE: NOTE: To hide the additional details, click the **Collapse** icon .

The courses are color-coded based on the due date. The following are the color codes and descriptions:

- The courses that have passed the due date are highlighted in red.
- The courses which are highlighted in orange indicated that the courses have passed the validity period and new course has been triggered and assigned.

Column Name	Displays the . . .
Course	Name of the course. Drilled-down: ● Course form **NOTE:** The hyperlink is available only for those courses whose status is In-Progress.
Type	Type of the course. Following are the possible course types: ● Instructor-led ● Media-based ● Hands-on ● Self-paced

Mandatory	Yes or No. ● **Yes**: Indicates course is mandatory and you must complete the course. ● **No**: Indicates course is not mandatory.
Due Date	Date when the course needs to be completed.
Curriculum/Ad-hoc	Name of the curriculum the course is attached to.
Status	Status of the course. Following are the possible statuses: ● **Not Started**: The courses that are assigned to you but you have not started. ● **In-Process**: The courses that are assigned to you and you have started.
Action	**Start** link. Drilled-Down: ● Course form ● The hyperlink is available only for those courses whose status is **Not Started**.

My Trainings Report Filters

To retrieve specific records in the related report, use these filter parameters.

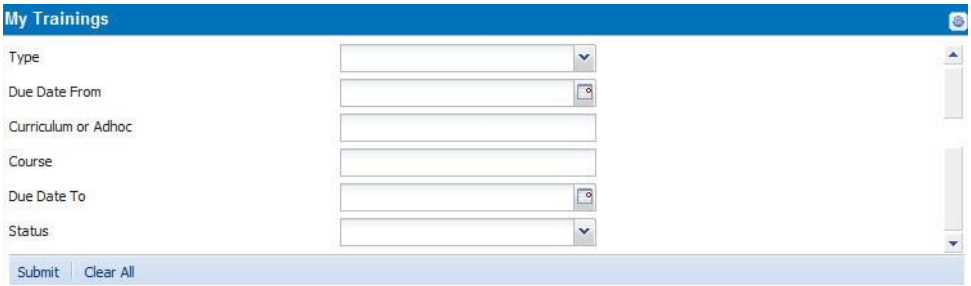

Figure 17: My Trainings Report Filters

The report details are narrowed down based on the values that you select in the filter fields.

Filter Name	Use This Filter to . . .
Status	Select the status of the course. The following options are available: ● **In Progress**: If you want to view the courses that are in progress, select this option. ● **Not Started**: If you want to view the courses that are yet be started, select this option.

	• **Scheduled**: If you want to view the instructor-led courses that are scheduled, select this option.

Pending Tests Report

Use the **Pending Tests** report to view and access all the test course assignments that are assigned to the logged-in user.

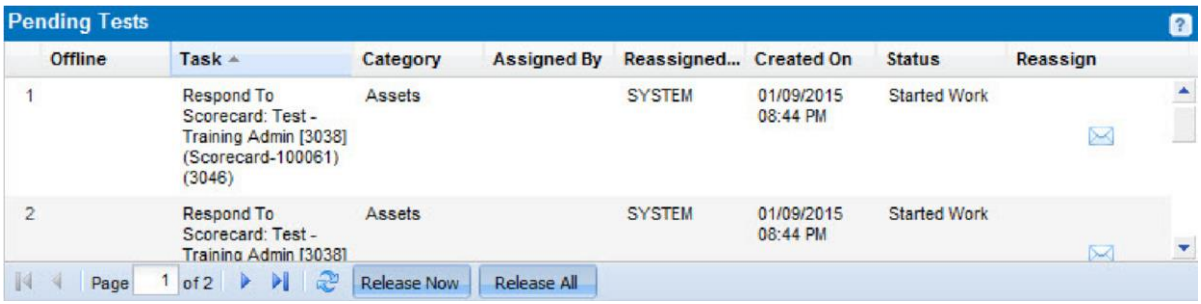

Figure 18: Pending Tests Report

Column Name	Displays the . . .
Task	Task assignment of the logged-in user. Drilled-down: • Survey Response form
Category	Category of the respective form defined in the Process Flow Design of the MetricStream platform (EGRCP).
Assigned By	Name of the user who assigned the task.
Reassigned By	Name of the user who reassigned the task.
Created On	Date on which the course test was created.
Status	Status of the course test.
Reassign	Click the **Reassign** icon to reassign the test task to a different user.

Pending Course Feedback Report

Use the **Pending Course Feedback** report to view and access all the feedback course assignments that are assigned to the logged-in user.

Figure 19: Pending Course Feedback Report

Column Name	Displays the . . .
Task	Task assignment of the logged-in user. Drilled-down: ● Survey Response Form
Category	Category of the respective form defined in the Process Flow Design.
Assigned By	Name of the user who assigned the task.
Reassigned By	Name of the user who reassigned the task.
Created On	Date on which the course feedback was created.
Status	Status of the course feedback.
Reassign	Click the **Reassign** icon to reassign the Test task to a different user.

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Glossary

Course

Refers to an individual topic for training.

Curriculum

A curriculum is a collection of courses that are mapped to organization, role or custom user groups.

Reports

A tabular representation of data.