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

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.

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.

[ota]| 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.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Click the Icon to . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Submit]</td>
<td>Submit the contents of the form and route to the next workflow step based on the action selected.</td>
</tr>
<tr>
<td>![Save Draft]</td>
<td>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.</td>
</tr>
</tbody>
</table>
| ![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.

Name *

Figure 2: Sample Mandatory Field
This page was left blank intentionally.
Completing Training Courses

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”. If 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](image)

**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](image)
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

<table>
<thead>
<tr>
<th>Field/List Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructions (read-only)</td>
<td>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.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Field/List Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Time (read-only)</td>
<td>The date and time when the training course is scheduled appears.</td>
</tr>
<tr>
<td>Venue (read-only)</td>
<td>The location where the training course is scheduled appears.</td>
</tr>
<tr>
<td>Instructor (read-only)</td>
<td>The name of the instructor who is conducting the training course appears.</td>
</tr>
</tbody>
</table>

The following field appears only for a computer-based training course type. You need to click the link to view and complete the course.

<table>
<thead>
<tr>
<th>Field/List Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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 setup is done while creating the courses.

<table>
<thead>
<tr>
<th>Field/List Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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.

<table>
<thead>
<tr>
<th>Field/List Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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.

<table>
<thead>
<tr>
<th>Field/List Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes or No options</td>
<td>This option allows you to self-certify that you have completed a course.</td>
</tr>
<tr>
<td></td>
<td>• Yes: If you want to self-certify after completing the course, select this option.</td>
</tr>
<tr>
<td></td>
<td>• No: If you do not want to self-certify after completing the course, select this option.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong>: You can click these links only after you click the documents and/or reference links provided for the course.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field/List Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Feedback check box</td>
<td>You can use this field to indicate whether or not you want to provide the course feedback.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong>: The Course Feedback is assigned to you after submitting the Course Assignment form.</td>
</tr>
<tr>
<td></td>
<td>If you do not want to receive the Course Feedback assignment and provide feedback for the course, this check box must be cleared.</td>
</tr>
</tbody>
</table>

| 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.

<table>
<thead>
<tr>
<th>Assigned to . . .</th>
<th>When you Select the Option . . .</th>
<th>Form Assigned</th>
<th>E-Mail Sent to . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trainees</td>
<td>Course Feedback check box in the Course Assignment form</td>
<td>Respond To questionnaire (course feedback questionnaire)</td>
<td>Trainees</td>
</tr>
<tr>
<td>Trainees</td>
<td>Not applicable</td>
<td>Respond To Questionnaire (Test Questionnaire)</td>
<td>Trainees</td>
</tr>
</tbody>
</table>

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.

Step 2  Click the Respond To Survey: Test / Respond To Survey: Feedback - <User Name> [Pending Test ID] [Survey-Survey ID>] (PID)
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.
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.
Course Test/Feedback Form > Action (on Form Submission) Section

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

<table>
<thead>
<tr>
<th>Field/List Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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

![Figure 15: Viewing Course Feedback and Test Response](image)

**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 Report](image)

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:** 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.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Displays the . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course</td>
<td>Name of the course. Drilled-down:</td>
</tr>
<tr>
<td></td>
<td>• Course form</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> The hyperlink is available only for those courses whose status is In-Progress.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of the course. Following are the possible course types:</td>
</tr>
<tr>
<td></td>
<td>• Instructor-led</td>
</tr>
<tr>
<td></td>
<td>• Media-based</td>
</tr>
<tr>
<td></td>
<td>• Hands-on</td>
</tr>
<tr>
<td></td>
<td>• Self-paced</td>
</tr>
</tbody>
</table>
### Mandatory

- **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.

<table>
<thead>
<tr>
<th>Filter Name</th>
<th>Use This Filter to . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Select the status of the course.</td>
</tr>
</tbody>
</table>

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](image)

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

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