

Series A: Administrative Settings and
Creating Learners

Table of Contents

Overview	2
Before You Use This Guide	2
Who Should Use This Guide	3
Contacts for Questions	3
General Settings	3
Notification Settings	7
Course Notification Templates	7
Learning Plan Notification Templates	9
Certification/License Notification Templates	10
Modifying Email Notifications	11
Custom Email Notifications	14
Copy, View, and Re-send Notifications	17
Custom Email by Course via Roster	18
Courses Settings	20
All Courses	22
Custom Online Courses	24
Learning Plans	27
Certificate Settings	28
Featured Courses	31
Users	32
Creating a New Learner	34
Creating Departments, Divisions, and Positions	38
Creating Departments	38
Creating Divisions	39
Creating Positions	40

Overview

HR Administrator are able to maintain several default system settings in Learn (LE). This includes general settings, notification settings, course settings, certificates, and featured courses. The Administrative settings in Learn guide helps administrators ensure key components of the system are properly configured.

Before You Use This Guide

NEOGOV must enable the Learn (LE) environment before you can configure the settings detailed in this guide. Contact your implementation consultant if your environment has not yet been activated.

Who Should Use This Guide

This guide is intended for the Learn HR Administrators who initially set up the system defaults as well as maintain the administrator settings on an ongoing basis.

Contacts for Questions

The following additional resources are available should you have any questions about Learn:

[NEOGOV Community](#): Requires NEOGOV product login ID and password for access

NEOGOV Customer Support: customersupport@neogov.com

NEOGOV Customer Support: (877) 204-4442

General Settings

To navigate to the Administrative Settings, select **Administrative** > **Settings** from the menu bar located at the top of the page.

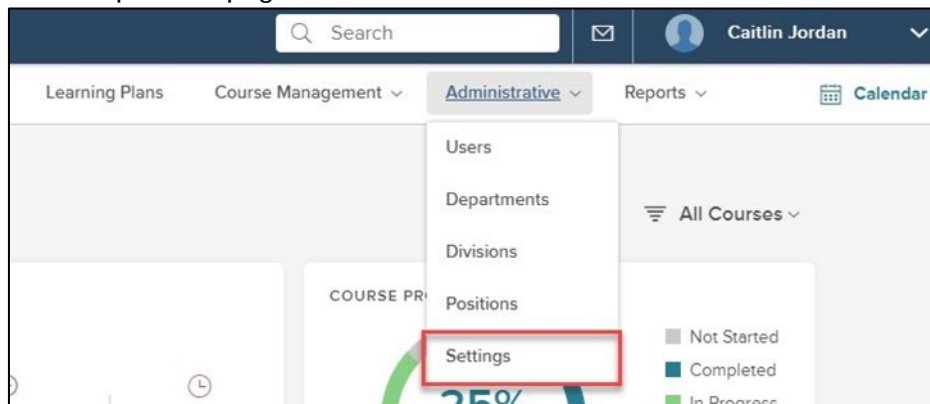
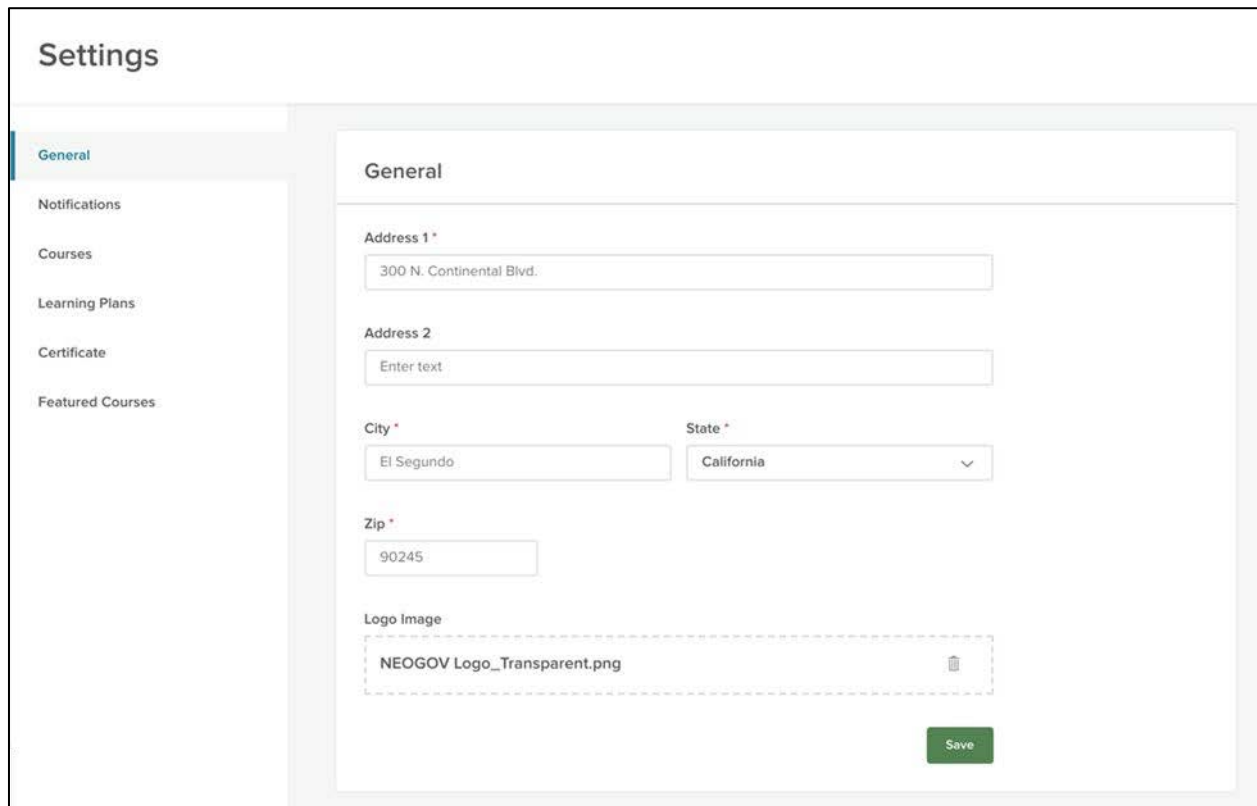


Figure 1: Navigating to Administrative Settings

By default, the Settings Menu loads to **General** settings.



The screenshot shows the 'Settings' page with a sidebar on the left containing the following menu items: General, Notifications, Courses, Learning Plans, Certificate, and Featured Courses. The main content area is titled 'General' and contains the following fields:

- Address 1 ***: Text input field containing '300 N. Continental Blvd.'
- Address 2**: Text input field containing 'Enter text'
- City ***: Text input field containing 'El Segundo'
- State ***: Dropdown menu showing 'California'
- Zip ***: Text input field containing '90245'
- Logo Image**: Image upload area showing 'NEOGOV Logo_Transparent.png' with a trash icon.

A green 'Save' button is located at the bottom right of the form.

Figure 2: General Settings

Notice how all five areas for Administrative settings are accessible through the left sidebar. This makes it easy to know which settings you're currently editing.

For now, let's start with the **General** settings.

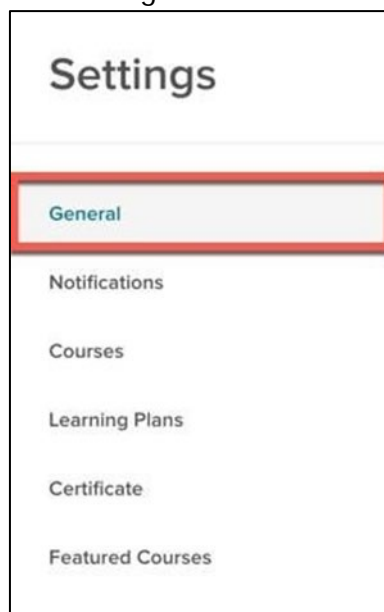


Figure 3: Navigating to General Settings

The **General** page contains your basic agency address and an (optional) agency logo. All required information is indicated by an Asterix (*).

Figure 4: General Settings

1. **Address:** Input your agency's full address
 - a. This address appears on the learner's transcript
2. **City:** Your agency's City
3. **State:** Your agency's State
4. **Zip:** Your agency's Zip Code
5. **Logo Image:** Optional space available to attach your agency's logo
 - a. This logo appears on the Learner transcripts and certificates
 - b. Recommended to provide a professional touch to the certificates
 - c. Supported image types are jpg, svg and png (Max: 5 MB)

When you are done configuring your **General** settings, hit **Save**.

Make sure to click Save before navigating away from any page in Settings to make your configuration updates live.

Notification Settings

The **Notifications** page allows you to customize emails and other notices sent to Learn users. To Navigate to the **Notifications** page, click the **Notifications** tab on the left sidebar.

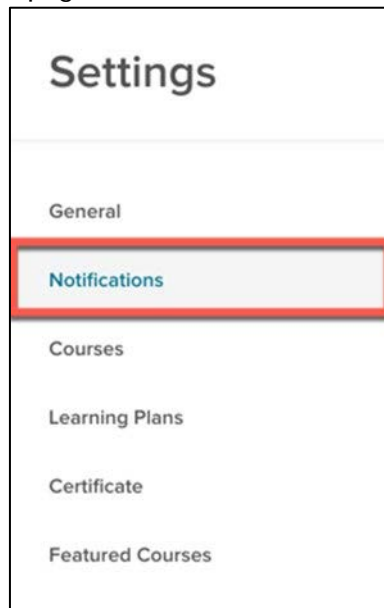


Figure 5: Navigating to Notifications

The Default Notifications page is split into three sections: **Course Notifications**, **Learning Plan Notifications**, and **Certifications/Licenses Notifications**. Each section contains several email notification templates that are configured to automatically send based on various events that take place in your Learn system, such as when a learner enrolls in a course, when course details are updated, and reminders for upcoming scheduled courses.

Administrators have the ability to customize the text in these emails, so it is important to have the emails configured properly and modified (if necessary) prior to using the system. The automatic emails keep your learners on track with their scheduled courses, which engender on time completions and overall higher course completion rates for your organization. These notifications save your administrators time and keep managers and employees informed at each step of the process.

Course Notification Templates

The first section of the **Notifications** section contains customizable emails related to Courses. There are notifications for both classroom and online courses.

Notification Name	Use Custom Email	Enable Notification Email
Online Course Enrollment Manager, Learner	✓	OFF <input checked="" type="checkbox"/> ON
Class Enrollment Manager, Learner	✓	OFF <input checked="" type="checkbox"/> ON
Class Update Instructor, Learner	✓	OFF <input checked="" type="checkbox"/> ON
Online Course Reminder And Overdue Learner		OFF <input checked="" type="checkbox"/> ON
Class Reminder Manager, Learner		OFF <input checked="" type="checkbox"/> ON
Class Waitlist Learner		OFF <input checked="" type="checkbox"/> ON
Online Course Drop Learner		OFF <input checked="" type="checkbox"/> ON

Figure 6: Course Notifications

The notice templates included in this section are as follows:

- **Online Course Enrollment:** This email is sent to the specified recipient(s) when a learner is enrolled in an online course
- **Class Enrollment:** This email is sent to the specified recipient(s) when a learner is enrolled in an instructor-led class
- **Class Update:** This email is sent to the specified recipient(s) to inform them the class details have been updated
- **Online Course Reminder and Overdue:** This email is sent to the specified recipient(s) when an online course they have enrolled in is due or overdue. Frequency of this notice can be set by the Administrator in the Course Settings section, or at the individual course level
- **Class Reminder:** This email is sent to the specified recipient(s) as a reminder of an upcoming instructor-led classroom course they have enrolled in. Frequency of this notice can be set by the Administrator in the Administrative Course Settings section, or at the individual course level
- **Class Waitlist:** This email is sent to the specified recipient(s) when a learner is added to the waitlist for an instructor-led class
 - A **Class Enrollment** notice is automatically sent to the specified recipients if a space opens up and the learner is added to the class
- **Online Course Drop:** This email is sent to the specified recipient(s) when an enrolled learner is dropped from an online course

- **Class Drop:** This email is sent to the specified recipient(s) when an enrolled learner is dropped from an instructor-led class
- **Online Course Completion:** This email is sent to the specified recipient(s) when a learner completes an online course
 - If a passing score is required, the associated score is included in this notification
- **Class Completion:** This email is sent to the specified recipient(s) when a learner completes an instructor-led class
 - If a passing score is required, the associated score is included in this notification
- **Online Course Enrollment Approval Request:** This email is sent to the specified approver when a learner requests enrollment in an online course which requires approval
- **Class Enrollment Approval Request:** This email is sent to the specified approver when the learner requests enrollment in an instructor-led class which requires approval
- **Online Course Enrollment Pending Request:** This email is sent to the learner, indicating a pending approval, when the learner requests enrollment in an online course which requires approval
- **Class Enrollment Pending Request:** This email is sent to the learner, indicating a pending approval, when the learner requests enrollment in an instructor led class which requires approval
- **Online Course Enrollment Approved Request:** This email is sent to the specified recipient(s) when the learner's enrollment request in an online course has been approved
- **Class Enrollment Approved Request:** This email is sent to the specified recipient(s) when the learner's enrollment request in an instructor led class has been approved
- **Online Course Enrollment Rejected Request:** This email is sent to the specified recipient(s) when the learner's enrollment request in an online course has been rejected
- **Class Enrollment Rejected Request:** This email is sent to the specified recipient(s) when the learner's enrollment request in an instructor led class has been rejected

Learning Plan Notification Templates

The second section of the **Notifications** section contains customizable emails related to Learning Plans.

Notification Name	Use Custom Email	Enable Notification Email
Learning Plan Registration Manager, Learner		OFF <input checked="" type="checkbox"/> ON
Learning Plan Completion Learner		OFF <input checked="" type="checkbox"/> ON
Learning Plan Unregistered Learner		OFF <input checked="" type="checkbox"/> ON
Learning Plan Reminder And Overdue Learner		OFF <input checked="" type="checkbox"/> ON

Figure 7: Learning Plan Notifications

The notice templates included in this section are as follows:

- **Learning Plan Registration:** This email is sent to the specified recipient(s) when a learner is enrolled in Learning Plan. This notification is in addition to the Course Enrollment notification if that is enabled.
- **Learning Plan Completion:** This email is sent to the specified recipient(s) when a learner completes a Learning Plan
- **Learning Plan Unregistered:** This email is sent to the specified recipient(s) when a learner is unenrolled (dropped) from a Learning Plan
- **Learning Plan Reminder and Overdue:** This email is sent to the specified recipient(s) to remind them of the Due Date and Registration Status of a Learning Plan when it becomes overdue

Certification/License Notification Templates

The third section of the **Notifications** section contains customizable emails related to Certifications and Licenses.

Notification Name	Use Custom Email	Enable Notification Email
Certification/License Pending Expiration HR Admin, Manager, Learner		OFF <input checked="" type="checkbox"/> ON
Certification/License Expired HR Admin, Manager, Learner		OFF <input checked="" type="checkbox"/> ON

Figure 8: Certification/License Notifications

The notice templates included in this section are as follows:

- **Certification/License Pending Expiration:** This email is sent to the specified recipient(s) when a learner's Certification/License is close to its expiration date
- **Certification/License Expired:** This email is sent to the specified recipient(s) when a learner's Certification/License has expired

Modifying Email Notifications

In addition to enabling or disabling an email notification, you can also customize each individual notification to your exact needs. You can see all details about a particular notification in its row.

Notification Name	Use Custom Email	Enable Notification Email
<p>1 Online Course Enrollment</p> <p>2 Hr Admin, Manager, Learner, Hr User, Custom User</p>	<p>3 ✓</p>	<p>4 OFF <input checked="" type="checkbox"/> ON</p>

Figure 9: Notification Information and Options

1. **Notification Name:** This is the name or purpose of the notification
 - a. Click on the Notification Name to edit the email notification
2. **Recipients:** These correspond to actual recipients selected on template
3. **Use Custom Email:** When the email notice is customized, a checkmark appears in this column
4. **Enable Notification Email:** View whether a notification is enabled/disabled
 - a. This setting can only be changed and saved by opening up the notice and clicking **Save** in the flyout

Figure 10: Notification Edit Page

1. **Use custom email content:** Enables customization of the notification email
 - a. Check this box to activate the custom content areas (2, 3, & 4)
 - b. To send the email as is, leave the **Use custom email content box** unchecked
 - i. If unchecked, you **CANNOT** make changes to areas 2, 3, & 4
2. **Tokens:** Provided merge fields to place in the subject line and body of the notification when customizing the content
 - a. To add a token, place your cursor in the area where you want to add the token, then click on the token
 - b. Remember to add appropriate spacing before and/or after the token so the notice is properly formatted when the recipient receives it
3. **Subject:** The subject of the email
 - a. Visible to the recipient when they receive the notification
 - b. Modifying this section is helpful to ensure learners pay attention to and open the emails
 - c. This field is not Rich Text Enabled
4. **Toolbar:** Rich Text Enabled settings to use when modifying the text in the body of the notification email
 - a. You can customize text by making it bold, italicized, aligned, numbered, and bulleted
 - b. Your notification can also contain links, an attachment, and a video
5. **Body:** The main text of the email visible to the recipient when they receive the notification

6. **Recipients:** Select the appropriate recipients of the email (always active)
 - a. Recipients vary depending on the type of email notification
 - i. Example: An online course does not have an instructor, so the recipient box for Instructor would not be selected on the **Online Course Enrollment** email. A class course, however, does have a live instructor, so the Instructor recipient box can be checked when configuring the **Class Enrollment** email
7. **Enabled:** The on/off switch for the email notice
 - a. Notifications are only sent if this is set to **ON**
8. **Save:** Confirms any customizations you have made to the email notification

From highlighting important messages with email subject lines to changing notification recipients, you can use these customizations to ensure you're getting essential information to the right people.

Add Managers as recipients to Reminder/Overdue Notifications to provide more transparency to Managers on their team's training activity and progress.

Custom Email Notifications

Custom email notifications allow administrators to send ad-hoc notifications to their employees from the Learn system. Custom notifications are a great way to keep employees engaged in training. Send upcoming training schedules, make announcements relating to courses, or share training information to specific groups, like all managers in the Human Resources Department.

From notifications, select **Custom Notifications**. The Custom Notification table displays information for all pending and past notices. From this table, **create** a new notification. **copy** or **resend** a previous notification.

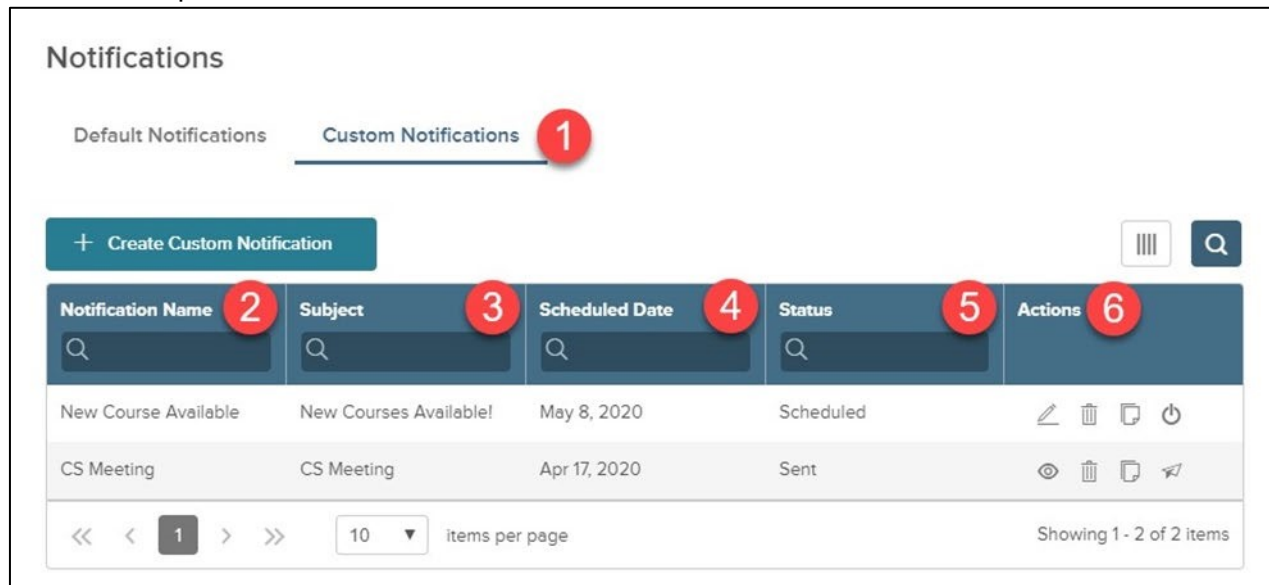


Figure 11: Custom Notifications

1. **Custom Notifications Tab:** To access the tab, navigate to the administrative settings, then select notifications.
2. **Notification Name:** Name of the custom notification.
3. **Subject:** Subject line of the notification.
4. **Scheduled Date:** Date selected for the notification to send.
5. **Status:** Status of the notification: Draft, Scheduled, Sent.
6. **Actions:** Edit, preview, delete, cancel scheduled send, copy, and resend notification.



Figure 12: Action Options

1. **Edit:** Edit the notification details before the notice is scheduled to send.
2. **Delete:** Delete the notification and notification details.
3. **Copy:** Copy the notification. Once copied, you can edit the details where needed. If you have previously sent a notification announcing upcoming courses, use the copy feature so you can simply update the attachments and dates accordingly.
4. **Cancel Send:** Cancel the scheduled send of a notification prior to the send date.
5. **Preview:** Preview the notification.
6. **Resend Notification:** Select the recipients and resend the notification.

To create a new custom notification, select the **Create Custom Notification** button. This will prompt you to begin populating the **Notification Name** and select the **Notification Trigger Type**.

Figure 13: Create Custom Notification Flyout

- **Send on Specific Date** to select recipients by department or user role.
- **Send by Online Course** to send a notification to specific employees based on their enrollment status in an online course.
- **Send by Classroom Course** to send a notification to specific employees based on their enrollment status in a classroom course, by class time.
- **Send by Learning Plan** to send a notification to specific employees based on their enrollment status in a Learning Plan.

With your trigger type selected, **Continue** to begin customizing your notice.

Add the notification details in order to specify who the notification should be sent to, the content of the notification, and schedule the date the notice should be sent. Depending on the trigger type selected, you may see different, or additional Notification Details options, to designate Course, Class, or Learning Plan name.

Figure 14: Custom Notification Creation Page

1. **Notification Name:** Name of the notification.
2. **Recipients by Department:** Select the departments that will receive the notification.
3. **Additional Recipients by email:** Add additional recipients by their email. Please note: A department must be selected before additional recipients can be added.
4. **Recipients by role:** Select recipients by user role: HR Admin, HR User, Manager, or Learner.
5. **Total user count:** Total number of recipients based on the selections.
6. **Notification content:** Content of the email notification.
7. **Send date:** Specify the date the notification should send. Please note: the notification will be sent between 2 AM to 6 PM (PST) on the selected date. This cannot be edited.
8. **Cancel or schedule send/save as draft:** Cancel the notification, schedule to send, or save as a draft.

The **Preview** button allows you to view the notification to confirm the information entered is accurate and displaying correctly.

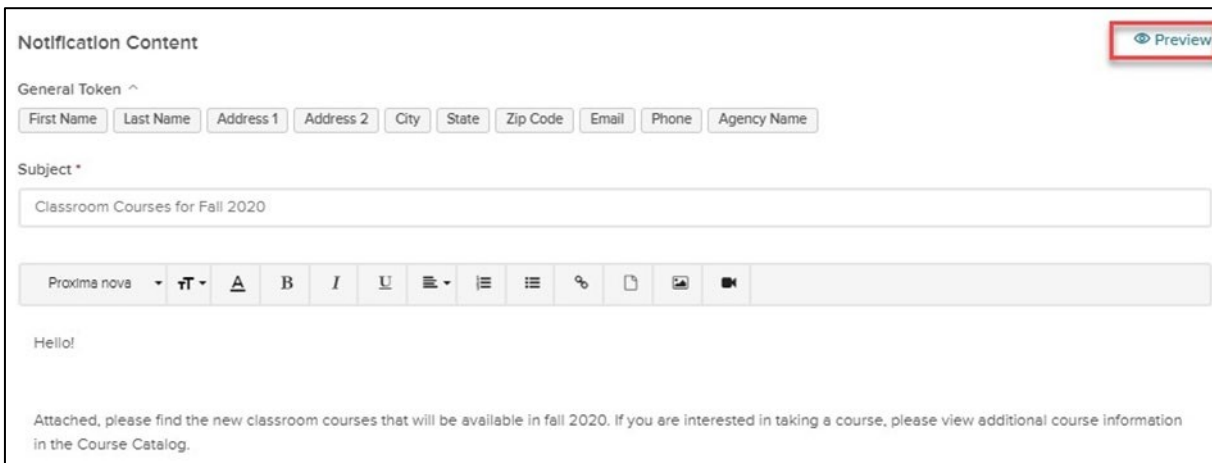


Figure 15: Notification Details Cont.

Once the information is confirmed, select **Schedule to Send** to schedule the notice. If edits are still required, select **Save as Draft**.

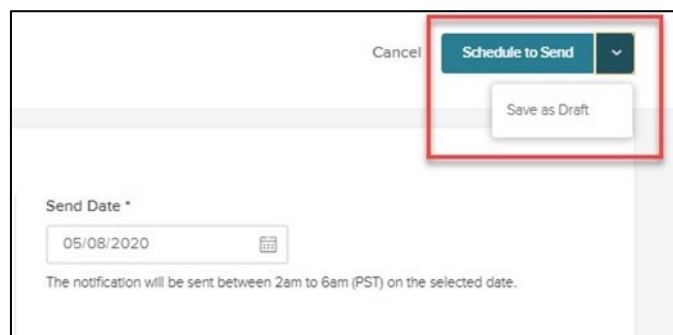


Figure 16: Schedule to Send/Save as Draft Options

Copy, View, and Re-send Notifications

Administrators also have the ability to copy, resend, and view custom notifications once they have been created and sent. This saves administrators time, rather than having to rebuild notifications from scratch.

To copy, resend, or view notifications, navigate to the notifications screen. Here you will see the **Actions** column.

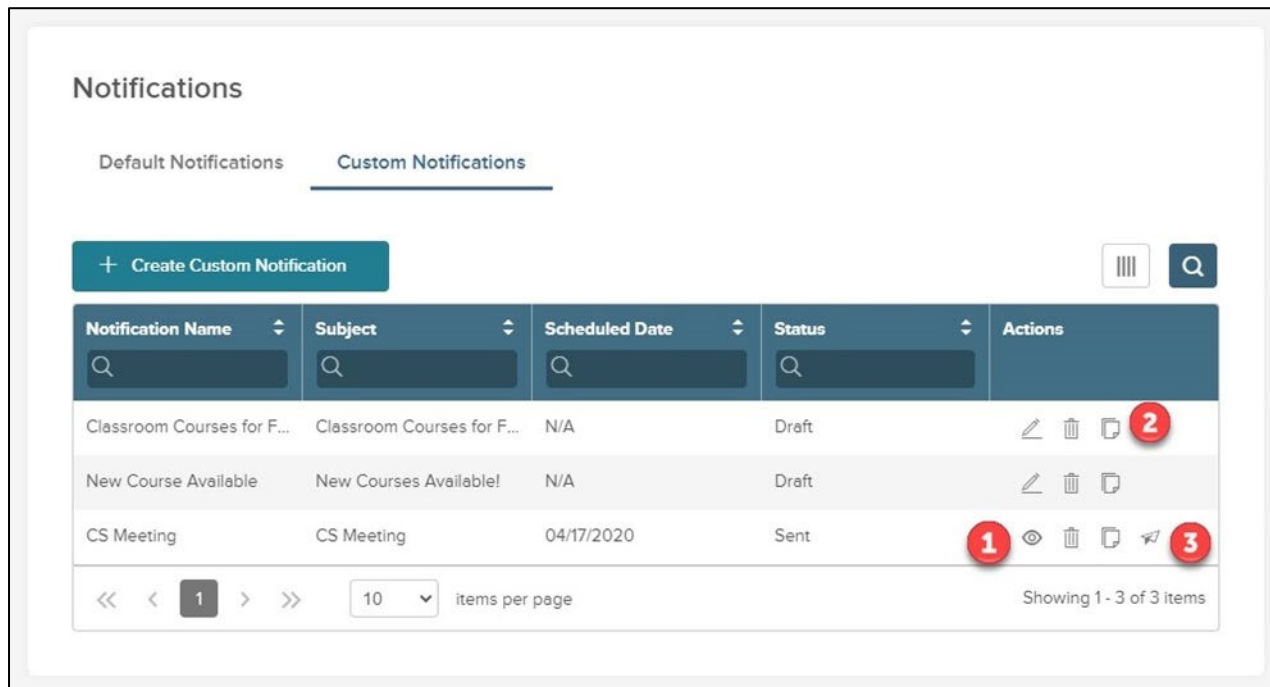


Figure 17: Custom Notification Actions

1. **View:** Allows the administrator to view a flyout of the notification.
2. **Copy:** Copies the notification.
3. **Resend:** Allows the administrator to resend the notification by individual recipients. Also gives the administrator the ability to add additional recipients by email.

Custom Email by Course via Roster

Administrators also have the ability to send out a notification to learners enrolled in a course through the **Admin Catalog** using the course roster.

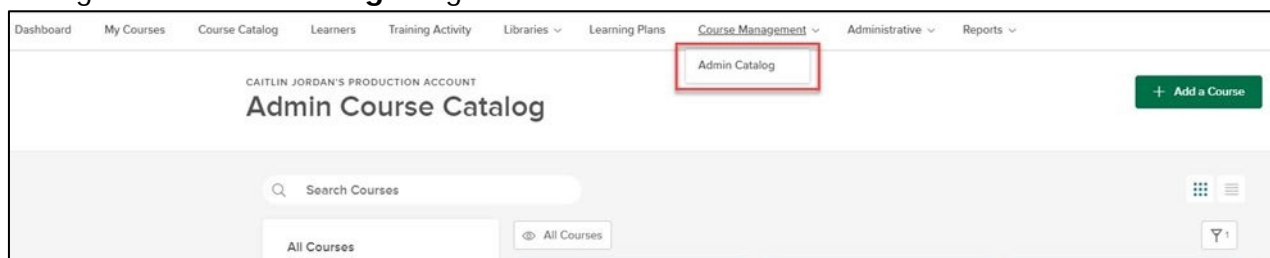


Figure 18: Navigating to the Admin Catalog

Once on the Admin Catalog, select the course you would like to send the notification out for. Remember, the course has to have at least one learner enrolled in order to send out the notification.

The **Course Details page** displays the roster of the selected course. From the **roster**, one or more learners can be selected that the notification will be sent to. Select a learner by clicking the box to the left of their name.

BUSINESS SKILLS
Basic Business Finance Principles
 Learn the basic accounting and finance concepts you need to be successful in modern business.

Enrolled **4**
 Pending **0**

01H 00M
 REQUIRED SCORE: N/A
 COURSE CODE: BG02
 SELF ENROLL: OFF
 NO APPROVAL REQUIRED

Preview Associations View Audit

Roster Edit status

All 4 Enrolled 4 Pending

Print Roster Enroll Learners

Bulk Actions

3 record(s) are selected. Select All 4 records Clear Selection

	First Na...	Last Name	Position	Due Date	Score	Status	Actions
<input checked="" type="checkbox"/>	Michael	Scott	HR Administ...		---	Not Started	Edit
<input checked="" type="checkbox"/>	Jim	Halpert	HR Assistant		---	Not Started	Edit
<input checked="" type="checkbox"/>	Dwight	Schrute	HR Assistant		---	Not Started	Edit
<input type="checkbox"/>	Carl	Walter	Sheriff		---	Not Started	Edit

Attachments
no attachments

Figure 19: Select Learners for Notification

Click the **Bulk Actions** button above the roster list. From the flyout, click **Create Custom Notification**.

Actions Done

Set Score

Create Custom Notification

Drop Learners From Course

Figure 20: Create Custom Notification

Add the notification details in order to specify the content of the notification, add additional recipients, and send the notification once finished.

Figure 21: Edit Notification Details

1. **Notification Name:** Name of the notification.
2. **Course Name:** Name of the course.
3. **Recipients:** The learners that were selected from the course roster.
4. **Total User Count:** Displays the total user count that the notification will be sent to.
5. **Notification Content:** Content of the notification.
6. **Additional Recipients by Email:** Add additional recipients by their email.
7. **Recipient's Manager:** Send a copy of the notification to each selected user's manager.
8. **Send:** Sends the notification out immediately.

Courses Settings

The next option in the left navigation pane is **Courses**. Click the **Courses** tab on the left sidebar to open the Courses page.

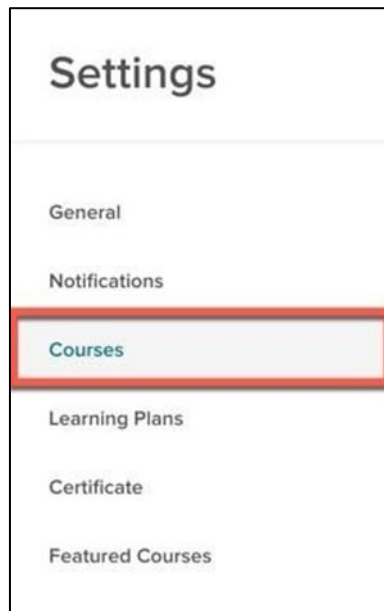


Figure 22: Navigating to Courses

The Courses section contains the default settings for your courses, which auto-populate on the individual course setup page to save time for users when creating courses.

Adjust these settings before adding Courses to ensure that new classes need less customization.

Some of these settings may not be applicable to a specific type of course. If that is the case, those settings are not visible on the actual course level. For example, settings for Online Courses do not apply to Classroom Courses.

All Settings here can also be configured on an individual Course basis, the Settings here simply determine the default settings.

Courses
Save

All Courses

Self-Enrollment

OFF ON

Enrollment Approval Required

OFF ON

Enrollment Approval

Select one ▼

Pass Required

OFF ON

Passing Score *

%

Display Dropped Courses

OFF ON

REMINDER SETTINGS

Reminder Notices

OFF ON

- 30 Days Before
- 2 Weeks Before
- 1 Week Before
- Days Before

Overdue Notices

OFF ON

- Every Week
- Every 2 Days
- Every Day
- Every Days

Online Course

Allow Learners to View Completed Course Content

OFF ON

Allow Learners to Review Question Answers ⓘ

OFF ON

Custom Online Course

Gated ⓘ

OFF ON

Allow Retakes?

OFF ON

Maximum Retakes Allowed *

Relative Due Date

Days ▼

Figure 23: Course Settings Page

Any changes you make here to the default configurations are only reflected on newly added courses. Previously customized settings on individual courses are not impacted.

All Courses

The Settings in the All Courses section apply to all courses.

Figure 24: All Courses Section

1. **Self-Enrollment:** Controls if learners can enroll themselves in the course
 - a. Allowing self-enrollment streamlines the process, greatly reducing HR's responsibility of managing enrollment
 - b. Gain employee trust by letting them choose areas they want to train and develop in
2. **Enrollment Approval Required:** This field adds a layer of approval to the enrollment process. If turned on, select the appropriate user role or specific employee responsible for approving enrollment
 - a. Using Enrollment Approvals saves time by ensuring learners only enroll in courses they belong in. It also gives more visibility to managers on what training their employees take
 - b. Refer to the **Notifications** section for notices pertaining to **Approvals**. These should be enabled **prior to requiring** enrollment approval on course(s)
3. **Enrollment Approval:** Select an enrollment approver from this dropdown menu
 - a. Selections are Manager, Instructor, Administrator, or a specific user
 - b. This field is required when Enrollment Approval is required
4. **Pass Required:** Determine if Learners must pass the course
 - a. Please note this field only applies to courses with scored assessments
5. **Passing Score:** If **Pass Required** is enabled, a passing score percentage must be entered
 - a. The system auto-scores quizzes, resulting in time savings over manually-scored quizzes

6. **Display Dropped Courses:** Controls if a *Cancelled* status displays for a dropped course (Enabled by default)
 - a. This feature is most helpful to clean up instances where a learner was erroneously enrolled in a course in which they had to be dropped

Reminder Settings

7. **Reminder Notices:** If enabled, reminder notices are sent to enrolled learners at the frequency selected
 - a. Reminder notices can be sent for classroom courses and online courses *if* they have a relative due date
 - b. Using reminder notices can help boost completion metrics and lower no-show rates
8. **Overdue Notices:** If enabled, overdue notices are sent to enrolled learners at the frequency selected
 - a. Overdue notices are *only* applicable for online courses, and are sent based on the Relative Due Date

Online Courses

These settings pertain only to online courses.

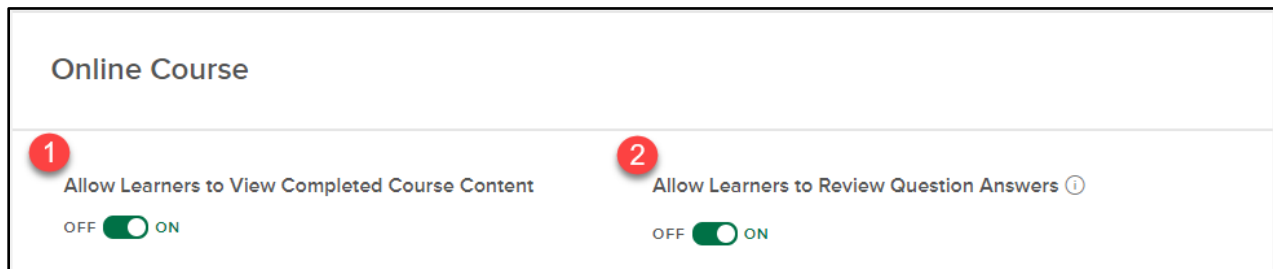


Figure 25: Online Courses Section

1. **Allow Learners to View Completed Course Content:** Controls if learners can review the content of a completed custom online course.
2. **Allow Learners to Review Question Answers:** Controls if learners can review correct and incorrect question answers for completed Custom Online Courses.
 - a. To enable Allow Learners to Review Question Answers, the Allow Learners to View Completed Course Content toggle must be enabled.

Custom Online Courses

These settings pertain only to custom online courses.

Figure 25b: Custom Online Course Settings

1. **Gated:** Requires courses to be completed in order by page (On by default)
 - a. Learners are only able to complete a gated course by viewing each page sequentially
 - b. This can help ensure your learners are going through the entire course rather than skipping through it
2. **Allow Retakes:** Gives learners the ability to retake the course if they do not pass the assessment associated with the course
 - a. This saves HR time by not having to re-enroll Learners in the course themselves
 - b. If **Allows Retakes** is enabled, **Pass Required** also becomes enabled
 - c. This setting should only be enabled if course retakes are allowed
3. **Attempts:** If allowing retakes, determine the number of attempts the Learner can make in order to **pass** courses that have assessments
4. **Relative Due Date:** When the course is due, relative to the enrollment date
 - a. Enter a number followed by a selection of days/weeks/months
 - b. After this date passes, the course is marked as **overdue**

In order to save any customizations made to the course default settings, click **Save** in the top right corner of the page.

Courses

All Courses

Self-Enrollment OFF ON

Enrollment Approval Required OFF ON

Enrollment Approval

Save




Figure 26: Save Button

Learning Plans

The next option down is for **Learning Plans** settings. Click the **Learning Plans** tab on the left sidebar to open the Learning Plans settings.

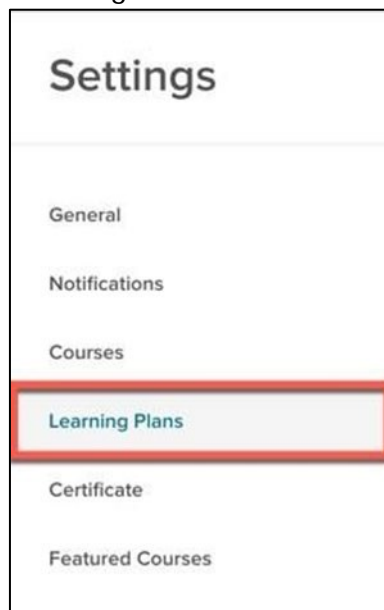


Figure 27: Navigating to Learning Plans Settings

The Learning Plans section contains the default settings for your Learning Plans, which autopopulate on the individual plan setup page to save time for HR Admins when creating Learning Plans.

The following reminder settings available for the Learning Plans are similar to other reminder settings within the system. Any changes to the default configurations are only reflected on newly added Learning Plans. Previously customized settings are not impacted.

All settings configured here can still be edited at the individual Learning Plan level. These settings only set the default for new Learning Plans.

Figure 28: Learning Plans Settings

1. **Display Unregistered Learning Plans:** Controls if a **Cancelled** status displays for a dropped Learning Plan (Enabled by default)
 - a. This feature is most helpful to clean up instances where a learner was erroneously enrolled in a Learning Plan in which they had to be dropped
2. **Reminder Notices:** If enabled, reminder notices are sent to enrolled learners at the frequency selected
 - a. Using reminder notices can help boost completion metrics and lower no-show rates
3. **Overdue Notices:** If enabled, overdue notices are sent to enrolled learners at the frequency selected

Certificate Settings

Next, you'll see **Certificates**. Click the **Certificate** tab on the left sidebar.

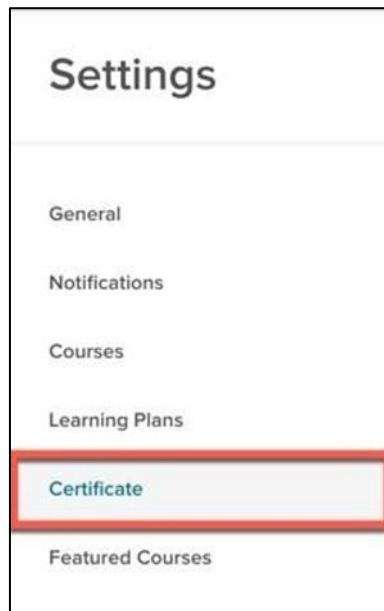


Figure 29: Navigating to Certificate Settings

Administrators can configure the certificate of completion that learners receive for completed courses. With Certificates, learners feel recognized and accomplished, which keeps them motivated to continue doing a great job and improve at work. They give learners positive and personalized recognition for the hard work and time they put into taking and completing training.

The displayed page shows a customizable certificate template.

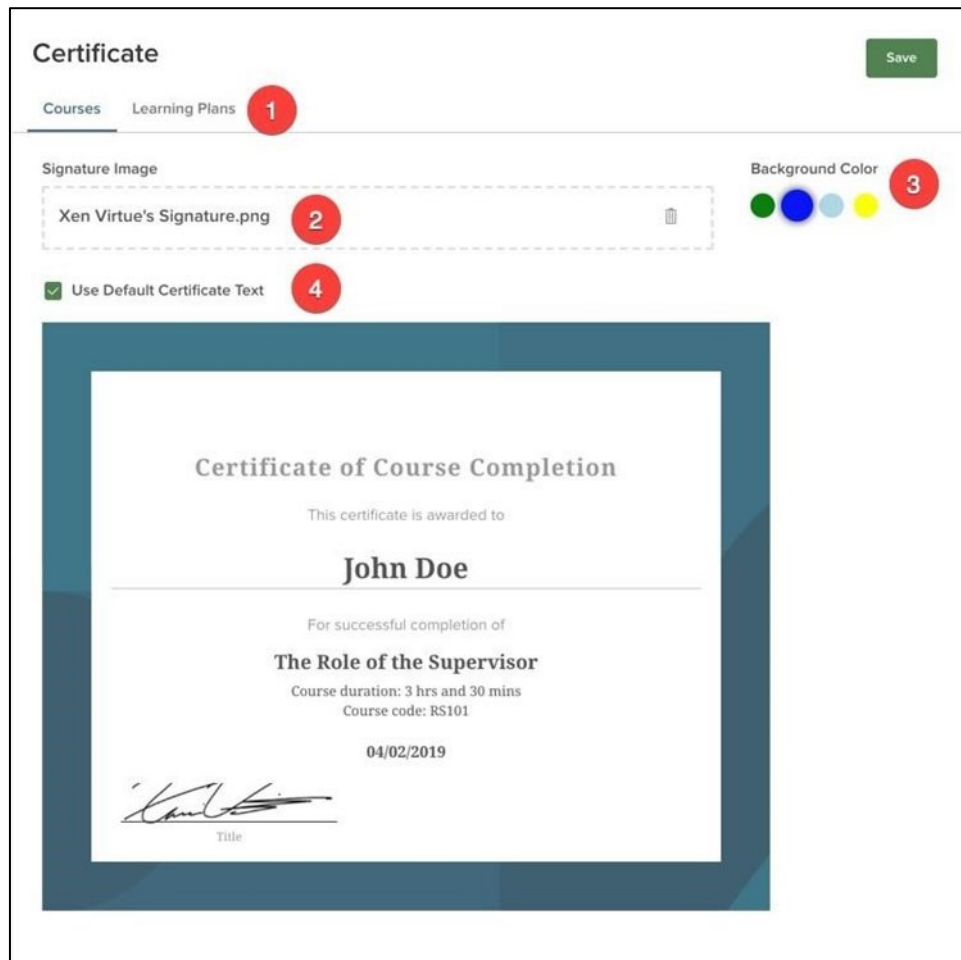


Figure 30: Configuring Certificates

1. **Header Tabs:** Switch between Certificate options for Courses and Learning Plans
2. **Signature Image:** A signature can be uploaded or dragged and dropped here
 - a. The signature displays in the lower left corner of the certificate in the Title area
 - b. The agency should determine which signature to use such as the HR Manager, Mayor, etc.
 - c. If you have uploaded an agency logo on the General settings page, it displays in the lower right corner of the certificate
3. **Background Color:** Choose from the available options for the Certificate border
4. **Use Default:** When this box is checked, no text modifications can be made to the certificate
 - a. When this box is unchecked, text modifications can be made to all text fields excluding learner name, course name, course code, and completion date

To edit the Certificate verbiage itself, click on the text to open the text box.

Featured Courses

The final section under is **Featured Courses**. Click the **Featured Courses** tab on the left sidebar.

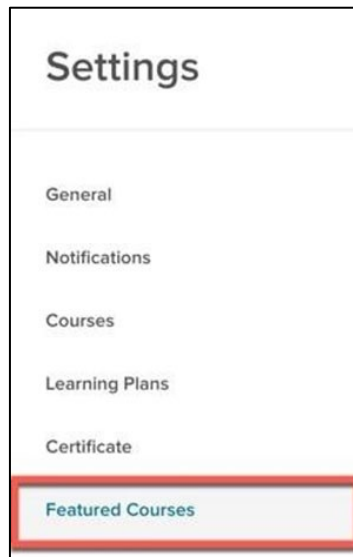


Figure 31: Navigating to Featured Courses

Here Administrators can feature up to three courses in the **Featured Courses** section, which displays on the learner's dashboard. This section allows you to promote new or upcoming courses you want employees to take and can include both classroom and online courses.

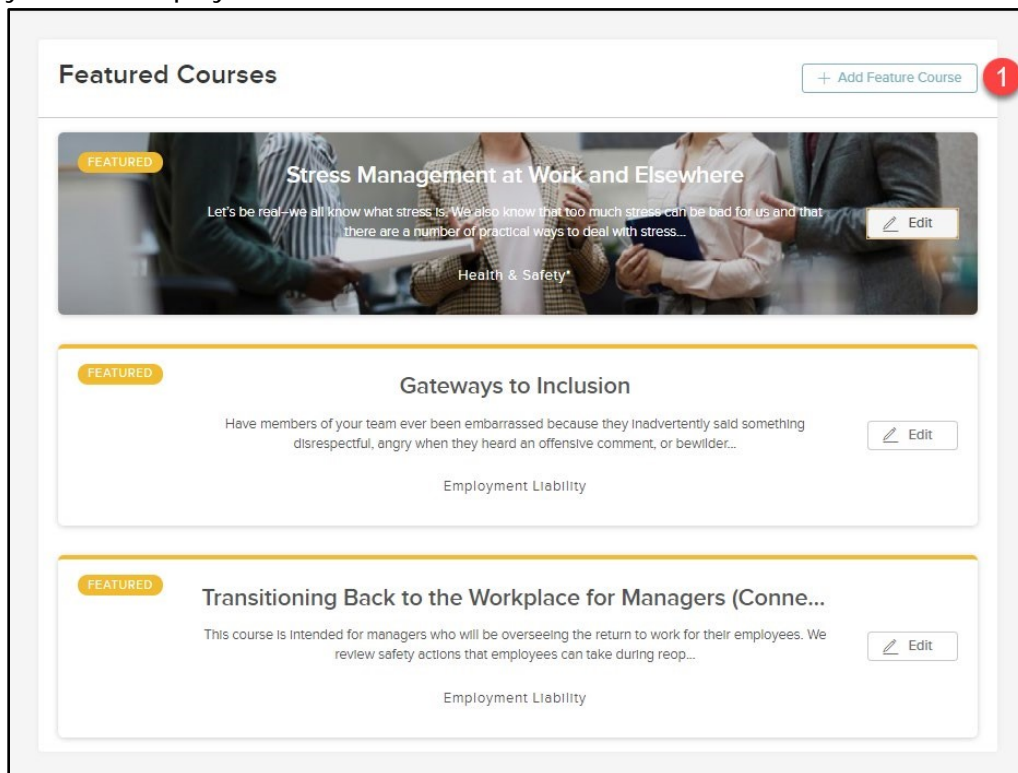


Figure 32: Featured Courses

1. **Add Featured Course:** User can select up to three (classroom or online) courses to feature for learners on their dashboards

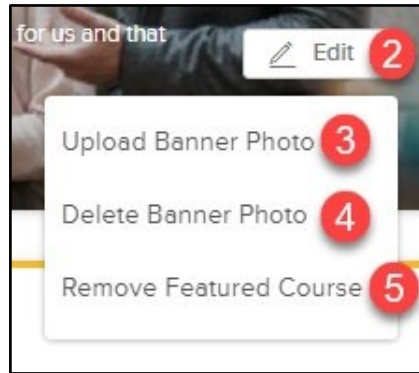


Figure 33: Featured Course Options

2. **Edit:** Each Featured Course contains a dropdown menu with the following editing options: Upload Banner Photo, Delete Banner Photo, and Remove Featured Course
3. **Upload Banner Photo:** User can upload banner photo of .svg, .jpg and .png format or up-to 10mb size
4. **Delete Banner Photo:** User can delete any Banner Photo or image associated to that Featured Course
5. **Remove Featured Course:** User can remove that Featured Course off Featured Course List

Users

In addition to these general Administrative Settings, there are also User Settings where HR can update the security profile for users and designate one or more employees as instructors.

To navigate to the Users Settings, select **Administrative > Users** from the menu bar located at the top of the page.

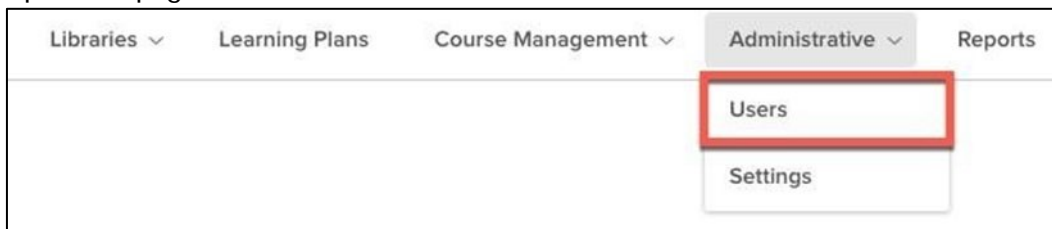


Figure 34: Navigating to the Users List

The resulting page displays a table chart of all employees within the system.

	1	2	3	4	5	6	7	8	9
	Username	Employee #	First Name	Last Name	Department	Account Status	Security Pro...	Is Instructor	Actions
<input type="checkbox"/>	cait_jordan124+1_...	44	Katie	L'Occitane	Human Resour...	Send Activation Email	Employee	No	
<input type="checkbox"/>	cait_jordan124@ne...	36	Kristina	Hill	Customer Succ...	Activated	Manager	No	
<input type="checkbox"/>	cjordan+01@ne...	010	David	Wallace	Human Resour...	Activated	HR Admin	No	
<input type="checkbox"/>	cjordan+08@ne...	08	Joseph	Jordan	Stumptown Poli...	Activated	Employee	No	
<input type="checkbox"/>	cjordan+09@ne...	09	Patrick	James	Information Tec...	Activated	Employee	No	
<input type="checkbox"/>	cjordan+1@neo...	001	Michael	Scott	Human Resour...	Activated	Manager	No	
<input type="checkbox"/>	cjordan+10@ne...	10	Rita	O'Brien		Activated	Manager	No	
<input type="checkbox"/>	cjordan+11@neo...	11	Connor	Jacob		Activated	Manager	No	
<input type="checkbox"/>	cjordan+12@ne...	12	Charlotte	Malloy	Customer Succ...	Activated	HR Admin	No	
<input type="checkbox"/>	cjordan+13@ne...	13	Emily	Ewart	Customer Succ...	Activated	Employee	No	

Figure 35: User List

1. **Username:** Users' username for the system
2. **Employee #:** Users' associated employee number
3. **First Name:** Users' first name
4. **Last Name:** Users' last name
5. **Department:** Users' assigned department.
6. **Account Status:** Users' current online access state. To send an activation email, select "Send Activation Email".
7. **Security Profile:** Users' current security permission
8. **Is Instructor:** Displays 'Yes' if user is marked as an instructor.
9. **Actions:** Use to edit the user's profile, deactivate a user, or send a password reset notification.
10. **Filter:** Use to sort the total list of users
 - a. Current filter options include username, employee #, first name, last name, department, account status, security profile, and is instructor.

Additionally, each column within the chart can be searched, making it easy to find an employee.

The main role of this page occurs within the **Actions** column. From here, click the pencil icon for a user to edit their Profile. Doing so causes the following flyout.

The screenshot shows the 'Edit Learner' form with the following fields and callouts:

- 1**: Name (Michael Scott)
- 2**: Employee # (001)
- 3**: Username (cjordan+1@neogov.net)
- 4**: Account Status (Activated)
- 5**: Profile Type (Employee/Manager)
- 6**: Is Instructor? (checkbox)
- 7**: Save/Cancel buttons

Figure 36: Edit Learner Flyout

1. **Name:** User's first and last name
2. **Employee #:** Users' employee number.
3. **Username:** Users' username.
4. **Account Status:** Displays whether the user is activated or deactivated.
5. **Profile Type:** User's Security Profile
 - a. Options include: Employee/Manager, HR User, and HR Admin
6. **Is Instructor:** Check whether or not this user is an instructor
7. **Save/Cancel:** Save or Cancel your changes by selecting these

Creating a New Learner

Any employees required to complete or assign courses in Learn must have an employee record set up in the system.

To access the Learner List, click on Learners in the top menu bar.

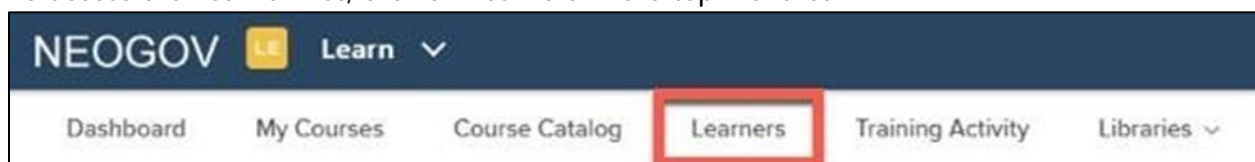


Figure 37: Navigating to the Learners List

To add a new learner manually, click the + **Add a Learner** button located at the top right of the page.

Learners List + Add a Learner

Bulk Actions ☰ 🔍

<input type="checkbox"/>	Photo	First Name	Last Name	Direct M...	Departm...	Position	Start Date	Online A...	Active	Email	Actions
<input type="checkbox"/>		Caitlin	Jordan	Pamela Bea...	Human Reso...	HR Director	02/22/2017	Activated	Yes	cjordan@ne...	
<input type="checkbox"/>		Michael	Scott	David Wallace	Human Reso...	HR Administ...	08/22/2018	Activated	Yes	cjordan+1@n...	
<input type="checkbox"/>		Jim A.	Halpert	Caitlin Jordan	Human Reso...	HR Administ...	05/21/2019	Activated	Yes	cjordan+2@...	
<input type="checkbox"/>		Dwight	Schrute	Caitlin Jordan	Human Reso...	HR Assistant	05/17/2018	Activated	Yes	cjordan+3@...	
<input type="checkbox"/>		David	Wallace	Caitlin Jordan	Human Reso...	HR Administ...	05/21/2019	Activated	Yes	cjordan+01@...	
<input type="checkbox"/>		Carl	Walter	Pamela Bea...	Public Safety...	Sheriff	08/01/2017	Activated	Yes	cjordan+4@...	
<input type="checkbox"/>		Eric	Matthew	Mary Francis	Pubic Safety...	Police Officer	06/19/2018	Activated	Yes	cjordan+5@...	
<input type="checkbox"/>		Richard	Jordan	Brian Down	Human Reso...	HR Assistant	02/08/2019	Activated	Yes	Cjordan+6@...	
<input type="checkbox"/>		Mary	Francis	Richard Jord...	Public Safety...	Sheriff	08/01/2017	Activated	Yes	cjordan+7@...	
<input type="checkbox"/>		Joseph	Jordan	Richard Jord...	Stumptown ...	Stumptown ...	05/16/2018	Activated	Yes	cjordan+08...	

« < 1 2 3 4 5 6 > » 10 Items per page Showing 1- 10 of 54 items

Figure 38: + Add a Learner Button

Add the Learner info, including: **First & Last Name**, **Employee #**, and **Email address**. All fields flagged in red are required.

The form is titled "Employee Info" and contains several sections:

- Personal Information:** First Name * (text input), Last Name * (text input), Employee Number * (text input).
- Position:** Position * (dropdown menu with "Choose Position" button and "Add new" link).
- Managers:** Direct Manager (dropdown menu), Additional Manager(s) (dropdown menu with "Add up to 5 additional managers" note).
- Hire Info:** Hire Date (calendar date picker), Position Start Date * (calendar date picker).
- Separation:** Separation Date (calendar date picker), FTE * (text input with value 1.00).
- Contact Info:** Address 1 (text input), Address 2 (text input), City (text input), State (text input with "Search or browse" note), Zip Code (text input).
- Phone and Email:** Phone (text input), Email * (text input).

Figure 39: Learner Information Fields

Select a Learner’s **Position** and click the **Choose Position** button.

This close-up shows the "Position *" dropdown menu. Below the dropdown is a blue button labeled "Choose Position" and a link labeled "Add new".

Figure 40: Choose Position Button

If the Position does not yet exist in your system, you can create one by clicking **Add New**.

This close-up shows the "Position *" dropdown menu. Below the dropdown is a blue button labeled "Choose Position" and a link labeled "Add new" which is highlighted with a red box.

Figure 41: Or Add New Position Button

Search and add the employee’s **Manager** and up to 5 **Additional Managers**.

This close-up shows two dropdown menus: "Direct Manager" and "Additional Manager(s)". Both dropdowns are highlighted with red boxes. Below the "Additional Manager(s)" dropdown is the text "Add up to 5 additional managers".

Figure 42: Choose Manager Dropdown

The new employee is immediately added into Learn.

They cannot log into their account until it has been activated. In order to activate their User account, the HR Admin must first send an Activation email.

Creating Departments, Divisions, and Positions.

Departments, Divisions, and Positions are the core entities that define employee groups and access throughout Learn. These entities may populate from Insight or another NEOGOV product if you are already live with the other product.

Creating Departments

Departments within the Learn system represent the major entities of your organization.

To add a new Department, select **Administrative**, then select **Departments**.

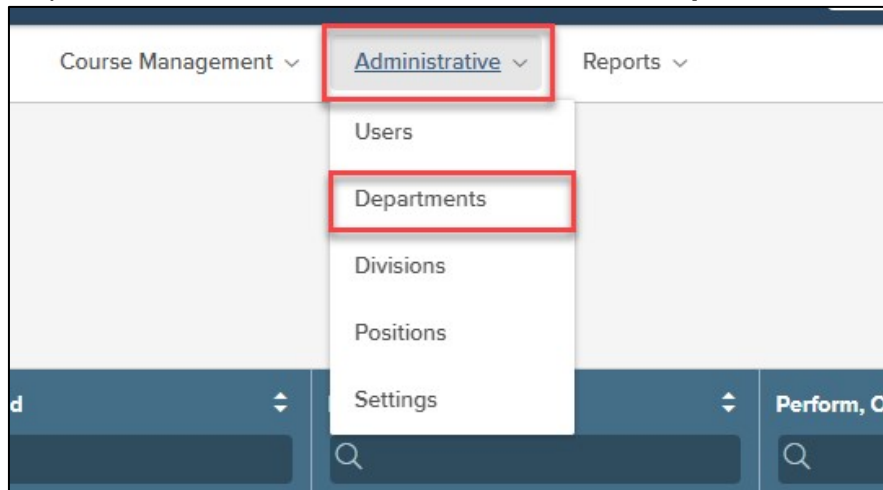


Figure 43: Navigating to Departments

Select the **+ Create** button.

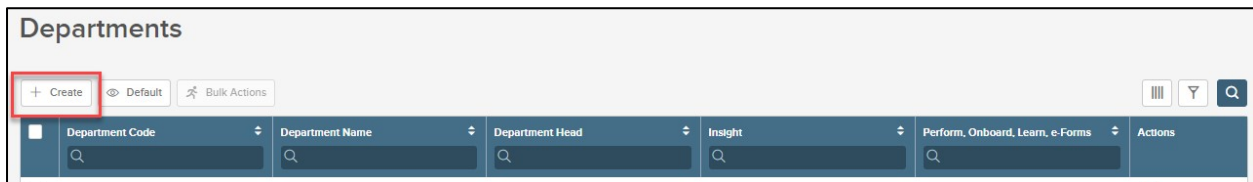


Figure 44: + Create Button

Enter information for the required fields for the Department.

The screenshot shows a form titled "Department Details". It contains two input fields. The first field is labeled "Department Code *" and has a red circle with the number "1" next to it. The second field is labeled "Department Name *" and has a red circle with the number "2" next to it. Both fields have a placeholder text "Enter text".

Figure 45: Required Department Fields

1. **Department Code:** Enter a code or abbreviation for the department. Use your organization's numbering or coding system for department. If your organization does not have a system, then use abbreviations or acronyms.
2. **Department Name:** Enter the full name of the department.

Once populated, select **Save**.

Creating Divisions

Divisions within the Learn system represent the minor entities of your organization; the entities that are subordinate to departments. Please note divisions are not required. If your organization has more of a horizontal architecture where there is simply one listing of departments, then you can skip creating divisions.

To create a Division, first select **Administrative**, then select **Divisions**.

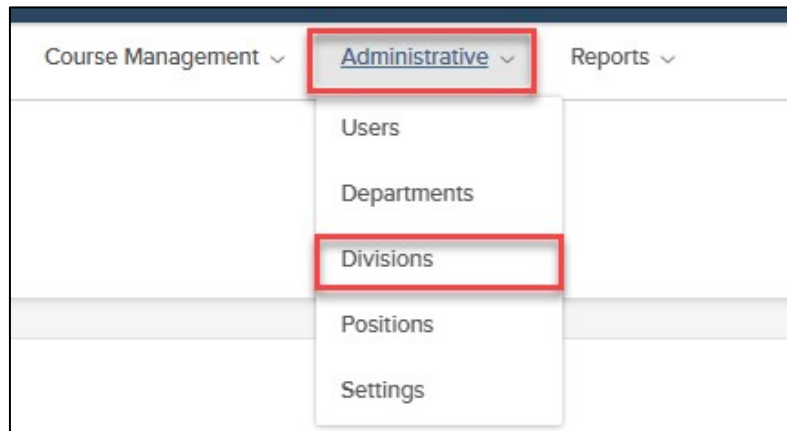


Figure 46: Navigating to Divisions

Select the + **Create** button.



Figure 47: + Create Button

Fill out the required fields. In addition to Division **Code** and **Name**, you must select the **Department** that the Division will fall under. To find the department, you may begin typing in the Department name or select the search icon to select from a list.

Figure 48: Required Division Fields

1. **Division Code:** Enter a code or abbreviation for the division. Use your organization's numbering or coding system for divisions. If your organization does not have such a system, then use abbreviations or acronyms.
2. **Division Name:** Enter the full name of the division.

Creating Positions

A significant component to the LE system is the Position. Positions are essentially the jobs employees work in. For employees to be added into LE, they must be added into a Position. As we've already seen, Positions also serve useful functionality in Learn such as in associating Courses.

Positions are required in Learn. They are not optional. At the very least, Departments must be associated to Positions. Divisions and Class Specs are optional.

NOTE: Insight customers use Class Specs to hire employees into. These same Class Specs automatically appear in Learn. However, since Positions (not Class Specs) are required fields in Learn, Class Specs would have to be assigned to Positions. Insight customers must associate

Class Specs and Divisions from Insight to Positions in Learn, particularly when using the new hire feed.

Insight customers should always maintain data on Class Specs, Departments, and Divisions in Insight. Changes made in Learn impact the tables in Insight.

For all other customers Positions, Departments, and Divisions can be added directly in Learn.

To navigate to the Positions list, select **Administrative**, then **Positions**.

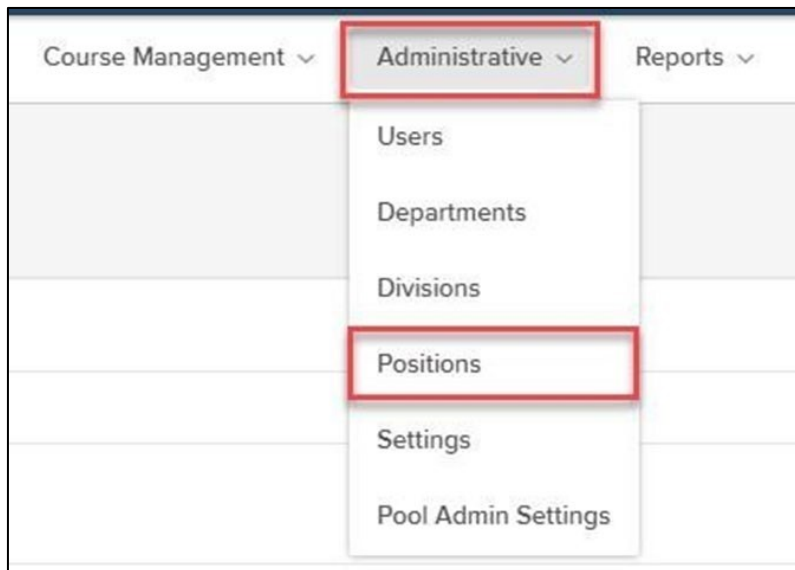


Figure 49: Navigating to the Positions List

Select the + **Create** button to create a new Position.



Figure 50: + Create Button

Once you've clicked the + button, the Add Position screen appears.

The screenshot shows a form titled "Add Position" with the following fields and callouts:

- 1. Title * (Required): Enter text
- 2. Position Code * (Required): Enter text
- 3. Description (Optional): Enter text
- 4. Department: * (Required): Select one (Choose from list)
- 5. Division: (Optional): Select one (Choose from list)
- 6. Class Spec: (Optional): Select one (Choose from list)
- 7. Bargaining Unit: (Optional): Select one (Choose from list)
- 8. Position Type: (Optional): Select one (Choose from list)
- 9. Max FTE (Optional): Enter text
- 10. Current FTE (Optional): Enter text
- 11. Active checkbox (checked) and Save/Cancel buttons.

Figure 51: Position Fields

1. **Position Title:** Name of the position (Required)
2. **Position Control Number:** Alphanumeric code for the position (Required)
3. **Description:** Description of the position (Optional)
4. **Department:** Department associated to the position (Required)
5. **Division:** Division associated to the department and position (Optional)
 - a. Provide if used in Insight
6. **Class Spec:** Class specification/code associated to the position (Optional)
 - a. Class code is required in Insight but optional in Perform
7. **Bargaining Unit:** Bargaining Unit associated to the position (Optional)
8. **Position Type:** Position Type like Full Time or Part Time (Optional)
9. **Max FTE:** Max allotted headcount for this position (Optional)
10. **Current FTE:** Current allotted headcount for this position (Optional)
11. **Save or Cancel:** Save the position information to create the position. Cancel to go back to the Position List

To make a change to a Position, i.e., to revise the Code or Title, click the edit (pencil) icon. To permanently remove a Position from the system, click the delete (trash can) icon. Once deleted, it cannot be retrieved!

Impersonation

Impersonation allows HR Admins to view any Employee, Manager, or HR User's system in a readonly view as if they were logged in as them.

Who Should Use This Section

HR Admins should use this section to learn who they can impersonate, along with how to impersonate. Impersonation is extremely useful for troubleshooting purposes prior to contacting NEOGOV Customer Support.

Impersonate Users

HR Admins can impersonate any user within Learn, excluding other HR Admins.

To impersonate, hover over your name and select **Impersonate User**.

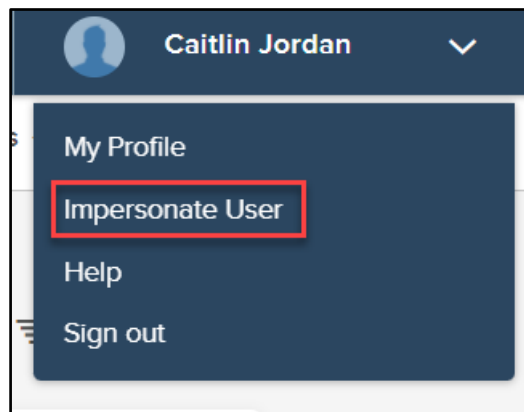


Figure 52: Impersonate User

A flyout opens where you can search for the employee that you need to impersonate.

Figure 53: Search for Employee

Search for the employee and then select **Impersonate** to begin impersonating.

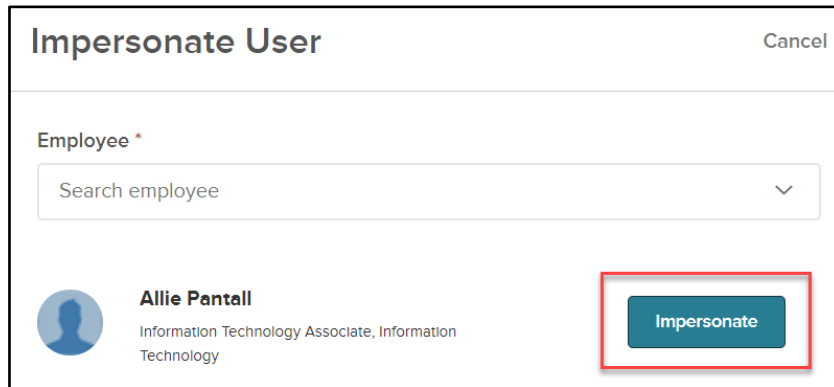


Figure 54: Impersonate

The employee's system can be viewed in a read-only mode. You are unable to complete tasks on the employee's behalf while impersonating.

To stop impersonating, select **Stop Impersonating** at the top of the screen.

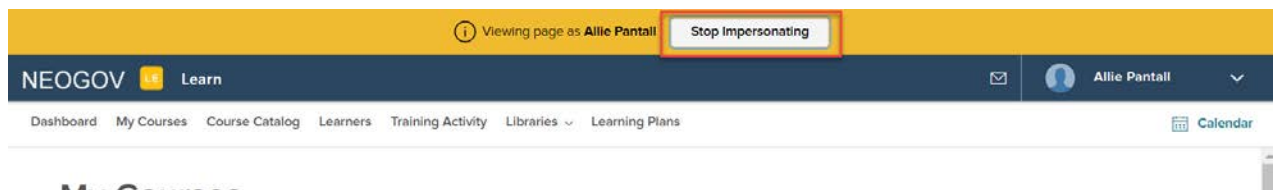


Figure 55: Stop Impersonating