



**SPILLETT LEADERSHIP
UNIVERSITY**
BOYS & GIRLS CLUBS



HR / OPERATIONS LEARNING ASSIGNMENT TOOL GUIDE

Revised Oct 27, 2023





Contents

| | | |
|------|--|----|
| ► 01 | Assign Training | 6 |
| ► 02 | Create a One-Time Assignment | 7 |
| ► 03 | Manage Learning Assignments | 21 |
| ► 04 | Remove Assignment from Transcript | 25 |
| ► 05 | Create Dynamic & Recurring Assignments | 27 |
| ► 06 | Inactivate Dynamic Assignment | 30 |
| ► 07 | Remove Dynamic Assignment | 31 |
| ► 08 | Reporting | 34 |
| ► 09 | Appendices | 38 |

About this Guide

This guide provides step by step guidance on how to assign training to individuals at your organization including how to:

- assign one or more training titles on an ad-hoc basis to one or more people
- set up automatic assignments to people as they join your organization
- enable yearly recurring assignment of training
- remove training from a user’s transcript
- run training reports

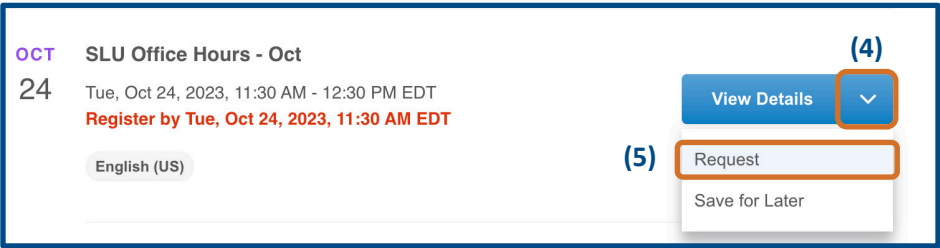
Throughout this guide, important items on screenshots are highlighted with an **orange** box around them. If many items are referenced, the use of numbers in parentheses, for example **(1)**, is used to guide you to the item.

If you need additional support in assigning training, please reach out to the help desk by clicking on the **Help** tab at the bottom right of the SLU Home page.



Office hours are also available if you prefer to speak with an expert directly by the following:

- Click the **magnifying glass (1)** to expose the **search bar (2)** at the top of the page
- Type **“SLU Office Hours”**
- Click **SLU Office Hours (Virtual)** from the list **(3)**
- Find a date/time that works for you, click the **drop-down arrow next to View Details (4)** and click **request (5)**



Before Creating a Learning Assignment

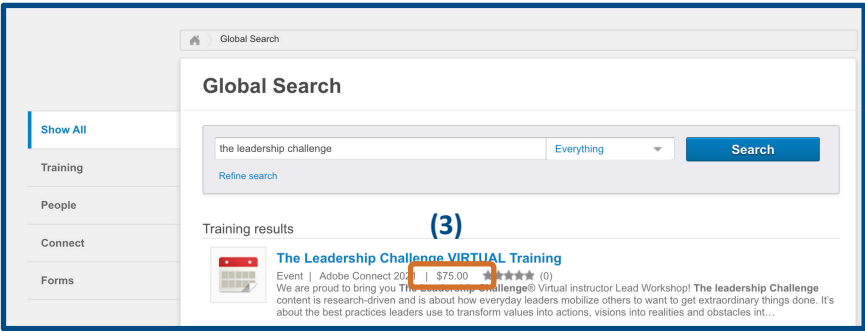
Before assigning training, determine if the training **has a fee** associated with it and/or a **pre-requisite** that must be completed before the training can be assigned.

As of Oct 2023, only 6 training titles have fees associated with them and they are listed in the Appendix 3 on page 41. However, given this can change over time, to determine if a training has a fee,

- Search for it in the catalog by **clicking the magnifying glass (1)** in the upper right corner of the SLU home page
- **Type the title of the training in the Search Spillet Leadership University box (2)** and **press the Enter/Return** key on your keyboard to execute the search



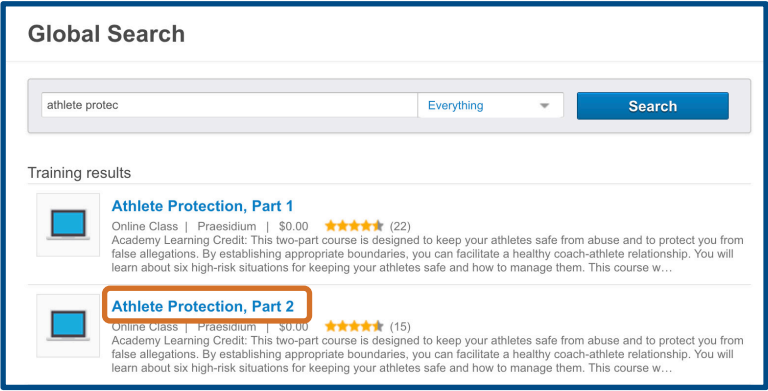
- If it returns a result with a **Training Price (3)**, the CEO or Org Admin needs to pay for the training before it is assigned.
 - For more information, please see the [Org Admin Guide](#) and refer to the section “Bulk Participation Enrollment of Fee Base Instructor-Led (ILT) Training Sessions” and then follow instructions on how to purchase and assign seats.



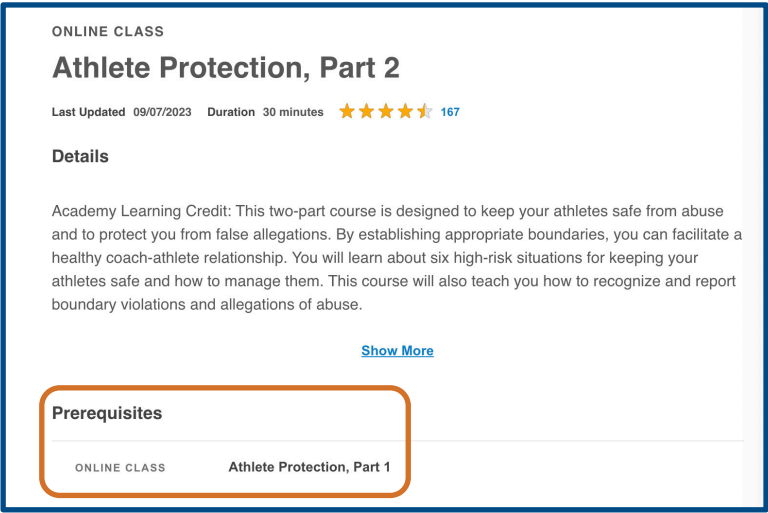
Before Creating a Learning Assignment

To determine if a training has a pre-requisite,

- Click the **title of the training** in the search results



If a training title has **Prerequisites**, it will be listed as shown below.

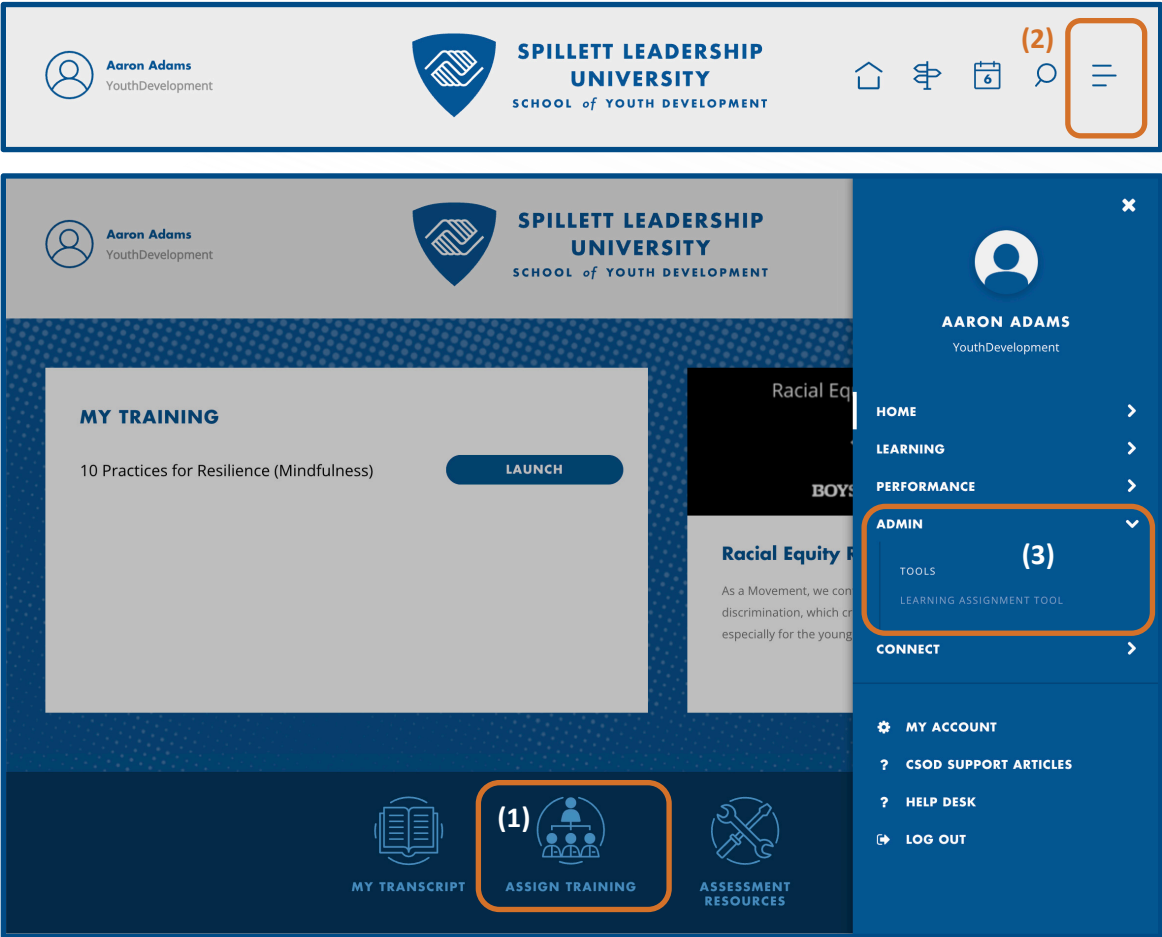


If a training title (for example Athlete Protection, Part 2), has a prerequisite (for example Athlete Protection, Part 1) that has not been completed, even if a learning assignment is created to assign Part 2, it will not be assigned to users that have not completed Part 1. See pages 33-34 for information on running the Training Progress Summary Pie Chart for a list of users who have not completed a prerequisite.

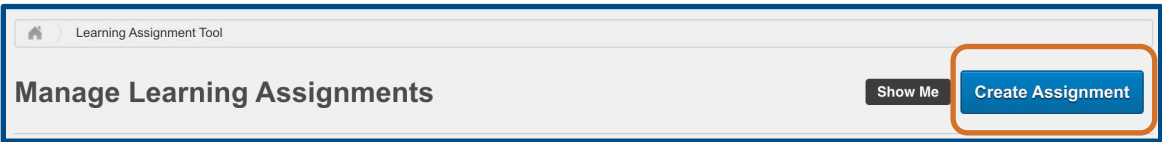
Assign Training

To assign training to one or more users in your organization, from the SLU home page,

- click the **Assign Training** icon (1)
- or click the **menu** bars in the upper right corner (2) and select **Admin > Learning Assignment Tool** (3) to navigate to the Manage Learning Assignments page.



Click **Create Assignment**.



Create a One-Time Assignment

A static, one-time assignment of training to one or more people, also known as a **standard** assignment consists of **five steps (1)** listed on the **left side** of the screen.

At any point in the process, click **Save Draft (2)** in the bottom left corner of the page to save a draft of your work and exit the assignment creation process or click **Cancel** to discard your work.

If the training to be assigned has a fee associated with it, your CEO or org admin will need to pay for it before you submit the assignment. Please see the [Org Admin Guide](#) and refer to the section “Bulk Participation Enrollment of Fee Base Instructor-Led (ILT) Training Sessions” and then follow instructions on how to purchase and assign seats.

(**Note:** If the training needs to be assigned and completed annually or more than once, please see pages 27-29 for the steps to create a recurring assignment.)

In the **Setup** step,

- Select **Standard (3)**
- In the **Assignment Title** and **Description** boxes (4), give the assignment a title and description to help you and others understand what is assigned and to whom
- Click **Select Training (5)**

Create Assignment

Assignment Type

Which Assignment Type would you like to create?

☒ Standard (process one-time only) (3)

☐ Dynamic (process continuously or periodically)

General Information

Assignment Title (4)

A Day At Day Camp Assigned to Everyone in Division - Sept 2023

Assignment Description

A required training for everyone.

Training Selection

Select the training for this Assignment

Select Training (5)

Selected Training

A Day at Day Camp

Provider : Praesidium - Current Version : 6.0 - Training Ho

Academy Learning Credit: Day camp can be a wonderful expe

confidence. But not if they are abused at camp by a counselor

happen in a day camp setting and steps you can take to keep

☒ Add comment to appear in the Transcript History section for each selected

Add a comment here if you wish giving more details like a previous version of

training.

(2) Cancel Save Draft Next

IMPORTANT!! - A training title can be offered in multiple modalities or training types. For example, the same title can be offered as a live in person training **event** or as an on demand **online course**. Be cognizant of what training type is selected. See page 40 for more information.

Select Training

There are several options for searching and filtering the catalog to find the training(s) to assign including:

- Typing search criteria in the **Search by Training Title (1)** or **Description (2)** boxes
- Clicking the drop-down arrow next to **Training Types (3)** and selecting an option such as Online Course, Event (an in person or virtual live training), or documents/pdfs known as Materials.
- After making your selection(s), click **Apply Filter (4)** to view a list of learning objects that meet the criteria. Click **Reset Filters (5)** to see the unfiltered list again.

Select Training

Search

Selected (1)

Search by Training Title (1)

Training Types (3)

Online Class

Languages

English (US)

Description (2)

Description

Reset Filters (5)

Apply Filters (4)

10 Practices for Resilience (Mindfulness)

Provider : Whil

Version : 1.0

Training Hours : 11 minutes

Price : \$0.00

Enjoy these one-minute resets when you're feeling moments of being stuck or overwhelmed.

2020 Child Safety Briefing

Provider : Boys & Girls Clubs of America

Version : 2.0

Training Hours : 10 minutes

Price : \$0.00

This course presents BGCA's vision for a culture of safety, highlights safety resources, and describes how to report safety and ethics related concerns.

7 Day Practice (Yoga)

Provider : Whil

Version : 1

Training Hours : 3 hours, 45 minutes

Price : \$0.00

In this yoga course, Janet Stone helps you to gradually intensify your practice over seven days with the basic elements of a practice. (Level: Beginner)

7 Practices for Self-Care (Mindfulness)

Provider : Whil

Version : 1.0

Training Hours : 7 minutes

Price : \$0.00

You may not be able to control the pace of the day, but this mini-course provides short mindfulness breaks to establish a health routine of push-and-recover.

A Day at Day Camp

Provider : Praesidium

Version : 6.0

Training Hours : 30 minutes

Price : \$0.00

Academy Learning Credit: Day camp can be a wonderful experience for kids. They make new friends, learn new skills, and increase their self-confidence. But not if they are abused at camp by a counselor or by another peer. This module shows you where and when abuse is most likely to happen in a day camp setting and steps you can take to keep kids at day camp safe.

Abuse Prevention Refresher

Provider : Praesidium

Version : 6.0

Training Hours : 30 minutes

Price : \$0.00

Academy Learning Credit: Welcome back! Your prior training and on-the-job experience has given you a great foundation for preventing child sexual abuse. In Advanced Abuse Prevention you'll build on this knowledge and learn new information about:

- How sexual abuse occurs in organizations.
- How to use red flags to keep kids safe.
- How to prevent false allegations of abuse.
- How to prevent sexual activity between children.
- How to apply what you know!

Abuse Risk Management (replaces Meet Sam) - This meets BGCA requirement for appro...

Provider : Praesidium

Version : 6.0

Training Hours : 30 minutes

Price : \$0.00

Academy Learning Credit: This course explains how offenders operate, the devastating effects of abuse and the specific steps you can take to prevent abuse and false allegations of abuse.

Cancel

Select

Next

Click the **Selected** tab to verify the titles chosen as part of the assignment

IMPORTANT!!

A training title can be offered in multiple modalities or training types. For example, a training title can be offered as a live in person training **event** or as an on demand **online course**. Be cognizant of what training type is selected. See page 40 for more information.

8

Select Training

- Place a **check mark (6)** next to each item to assign
 - If you are assigning people to a session on a specific date/time, please also assign them to the event. See Appendix 5 on page 44 for additional information.
- **Note** there can be multiple pages of results. To view the next page of results, **scroll** to the bottom and click the next page **(7)**
- To review what training was selected, click the Selected tab towards the top of the page (see blue box on previous page). Once verified that the correct item(s) are selected, **Click Select. (8)**
- Confirm everything looks correct on the **Setup** step and Click **Next. (9)**

Select Training

Provider : SCHOOL OF MANAGEMENT Version : 1.0 Training Hours : N/A Price : \$0.00

(6)

☒

7 Day Practice (Yoga)
Provider : Whil **Version :** 1 **Training Hours :** 3 hours, 45 minutes **Price :** \$0.00
 In this yoga course, Janet Stone helps you to gradually intensify your practice over seven sessions with the basic elements of a practice. (Level: Beginner)

☐

7 Practices for Self-Care (Mindfulness)
Provider : Whil **Version :** 1.0 **Training Hours :** 7 minutes **Price :** \$0.00
 You may not be able to control the pace of the day, but this mini-course provides short mindfulness breaks to establish a health routine of push-and-recover.

(7)

☐

A Boys & Girls Club Career
Provider : Boys & Girls Clubs of America **Training Hours :** N/A
 This video provides an introduction and overview of the careers within a Boys Girls Club

☐

A Day at Day Camp
Provider : Praesidium **Version :** 6.0 **Training Hours :** 30 minutes **Price :** \$0.00
 Academy Learning Credit: Day camp can be a wonderful experience for kids. They make new friends, learn new skills, and increase their self-confidence. But not if they are abused at camp by a counselor or by another peer. This module shows you where and when abuse is most likely to happen in a day camp setting and steps you can take to keep kids at day camp safe.

(8)

☐

A Warm Welcome from Jim Clark
Provider : School of Executive Leadership **Training Hours :** 3 minutes
 A personal welcome to new CEO's from BGCA's President and CEO, Jim Clark.

☐

Abuse Prevention Refresher
Provider : Praesidium **Version :** 6.0 **Training Hours :** 30 minutes **Price :** \$0.00
 Academy Learning Credit: Welcome back! Your prior training and on-the-job experience has given you a great foundation for preventing child sexual abuse. In Advanced Abuse Prevention you'll build on this knowledge and learn new information about:
 • How sexual abuse occurs in organizations. • How to use red flags to keep kids safe. • How to prevent false allegations of abuse. • How to prevent sexual activity between children. • How to apply what you know!

(9)

☐

Abuse Risk Management (replaces Meet Sam) - This meets BGCA requirement for appro...
Provider : Praesidium **Version :** 6.0 **Training Hours :** 30 minutes **Price :** \$0.00
 Academy Learning Credit: This course explains how offenders operate, the devastating effects of abuse and the specific steps you can take to prevent abuse and false allegations of abuse.

☐

Abuse Risk Management (replaces Meet Sam) - This meets BGCA requirement for a...
Provider : Learning Coach **Training Hours :** N/A **Price :** \$0.00
 This course explains how offenders operate, the devastating effects of abuse and the specific steps you can take to prevent abuse.

(10)

☐

Abuse Risk Management (replaces Meet Sam) (NTI) - This meets BGCA requirement ...
Provider : YDP: Tier 1 Program Basics in Practice **Training Hours :** N/A **Price :** \$0.00
 This course explains how offenders operate, the devastating effects of abuse and the specific steps you can take to prevent abuse.

☐

Abusive Head Trauma (Required for all PALS staff)
Provider : BGC Greater Milwaukee **Version :** 1.0 **Training Hours :** N/A **Price :** \$0.00
 Abusive head trauma is a form of physical abuse that can occur when an infant or young child is violently shaken and/or slammed. It is sometimes called "Shaken Baby Syndrome." This type of trauma does not result from tossing or bouncing an infant in play or jiggling an infant awake. The number one most common trigger for Shaken Baby Syndrome is frustration with infant crying. Increased infant crying is a developmental normal period that will eventually pass. Even just a few seconds of...

Cancel

(7)

1 2 3 4 5 ▶ ⏮ ⏭

1 to 20 of 2041

(9)

Next


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Prerequisite Warning

Some training items, like the Trauma Aware Curriculum below, have pre-requisite training items that are required to be completed before the current training item can be assigned. If an item has a pre-req, you will see a warning like the one highlighted in orange below letting you know it has a pre-req.

If the users to whom you are assigning the current item have not completed the pre-req they will not be assigned the training. Refer to pages 4-5 for information on identifying if a training title has a pre-req and who has or has not completed it. You can save the learning assignment as a **Draft** and come back to it if you need to. Otherwise **click** the blue **Next** in the bottom right of the screen.

Note: After a learning assignment is submitted, you can view a list of people who were not assigned the training title(s) on the **Not Assigned** tab. See page 22 for an example.


 There are warnings associated with selected training items.

Training Selection

Select the training for this Assignment

Select Training

Selected Training



Trauma Aware Curriculum

Provider : School of Youth Development

Current Version : 1.0

Training Hours : 1 hour, 37 minutes

Price : \$0.00

View Warning

The Trauma-Informed Curriculum is a 4 part series of micro-learning that focus on foundational knowledge needed to become a trauma-informed Club or Youth Center. In this first part, we will focus on becoming trauma aware and preparing to be able to implement trauma-informed practices. Information will be delivered in videos, articles, and graphics. You will apply and assess your new knowledge using reflection questions and application suggestions. For the best learning experience, this 4-part series must be completed in the following sequential order: Building...

☐ Add comment to appear in the Transcript History section for each selected training.

Options

The second step in the process is named **Options**. In the **Training Assignment Workflow** section, best practice is to select **Assigned, Approved and Registered (1)** as it limits the number of clicks required for a user to launch training.

The **Prerequisite Options** can not be changed and are set to require pre-reqs to be completed before a training item can be assigned.

In the **Email Settings** section, best practice is to use the Training Specific emails set up by the SLU Admin team. To do this, select **Training Specific Emails (2)**

Click **Next (3)** to proceed to the **Schedule** step or **Previous** to return to the Setup step.

Learning Assignment Tool

Create Assignment

Create Assignment

Setup

Options

Schedule

Users

Confirm

Training Assignment Workflow

How would you like the training to be assigned to users? Your selection will impact what status the training will be in on users transcripts.

Assigned only

Assigned and Approved

Assigned, Approved, and Registered (1)

Prerequisite Options

Set the prerequisite preferences for this Learning Assignment.

Enforce prerequisites. When enabled, users not satisfying training prerequisites will not receive the associated training.

Email Settings

What email settings would you like to apply to this Assignment?

Training Specific Emails (2)

Send emails to users based on the email settings configured at the training level. You can review these email settings on the Confirm tab.

Send additional emails to notify users of training assignment or registration.

Send Assign Training emails

Send Register Training emails

Custom Emails

Send custom emails to users for this Assignment. Any other emails configured at the training level (that are not displayed here) will continue to be sent to users.

Ad-Hoc Email

Send an ad-hoc email to users each time this Assignment processes. This suppresses all emails configured at the training level.

No Emails

No emails will be sent to users.

Curricula with Auto-Registration

Curricula may contain training set to Auto-Register upon registration of the Curriculum. You can suppress this Auto-Registration action from sending additional emails to users.

Send Register Training emails

Cancel

Save Draft

(3)

Previous

Next

11

Schedule

For the third step in the process named **Schedule**, in the **Processing Start Date** section, **select**

- **As soon as Assignment is submitted** to add the training to the users' transcripts immediately. If selected, system emails will fire alerting the learner(s) of the assignment.
- **Specific date** to add to their transcripts and deliver emails on a date in the future

In the **Training Start Date** section, **select**

- **As soon as training is assigned** to enable users to launch training as soon as it's on their transcript
- **A Specific date** after it's assigned and on their transcript that they can launch the training

In the **Training Due Date** section, **select**

- **No due date** if there is not a requirement to complete the training by a certain date
- **Relative Date** to set the due date relative to another date like the Date Assigned
- **Specific Date** to select a specific due date

Click **Next** to move to the Users step to select to whom to assign the training.

Learning Assignment Tool Create Assignment

Create Assignment

- ☒ Setup
- ☒ Options
- ☐ **Schedule**
- ☐ Users
- ☐ Confirm

Processing Start Date

When would you like the assignment to start processing and assign the training to users?

☒ As soon as Assignment is submitted

☐ Specific date

Training Start Date

When would you like users to be able to start the training?

☒ As soon as the training is assigned

☐ Specific date

Training Due Date

When would you like the training to be due?

☐ No due date

☒ Relative date

Day(s) from Date Assigned

☐ Specific date

Cancel Save Draft

Previous **Next**

Note the help icons in the upper right of each section.

Users

In fourth step, select the users to whom you want to assign the training by **clicking Select Users**.

In general, training is assigned to either:

- a **user** or users in your organization
- or to your entire organization referred to as a **division** in SLU

These options are known as **Organization Units or OUs** in SLU administration terms.

Learning Assignment Tool Create Assignment

Create Assignment

- Setup
- Options
- Schedule
- Users**
- Confirm

User Criteria

Select the user criteria that will define who is included in the Assignment.

Select Users

Add users by selecting organizational units, groups and/or individual users.

Select Users All Users

Upload Users

Add users by uploading files with their Username, User ID or Email Address in the .csv format. Each file can have a maximum of 2000 users.

Select File Upload File

Assign New Occurrence

Enable this setting to assign a new occurrence of the training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained.

☐ Enable Assign New Occurrence

Generate Initial User List

Cancel Save Draft Previous Next

Select Users

Search Selected (0)

Users Search by First Name and/or Last Name Filters

- Cost Center
- Division**
- Group
- Location
- Org Site
- Position
- Region
- Service Unit
- ☒ Users

Username **Manager**

Username Manager's First Name and/or Last Nam

Division **Location**

Division Location

Apply Filters

Users - Assign to Your Entire Organization

To assign to everyone in your organization,

- Click **All Users** next the the **Select Users** button.
- It will look as though you are assigning to everyone at Boys and Girls Clubs of America but because your permissions to assign training are constrained to just your organization, it will only assign the training to people in your organization.
- Proceed to the page titled “**Users – Generate Initial User List**” (page 18)

Learning Assignment Tool Create Assignment

Create Assignment

- ✓ Setup
- ✓ Options
- ✓ Schedule
- Users**
- Confirm

1 The User Criteria you select will only include users who meet the following criteria: Division is or below Boys & Girls Clubs of Greater Houston


User Criteria

Select the user criteria that will define who is included in the Assignment.

Select Users

Add users by selecting organizational units, groups and/or individual users.

Select Users **All Users**

 All users in Corporation: Boys and Girls Clubs of America

Upload Users

Add users by uploading files with their Username, User ID or Email Address in the .csv format. Each file can have a maximum of 2000 users.

Select File Upload File

Assign New Occurrence

Enable this setting to assign a new occurrence of the training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained.

☐ Enable Assign New Occurrence

Generate Initial User List

Cancel Save Draft Previous Next

Users - Assign to One or More Users in your Organization

To assign to one or more users,

- Ensure **Users** is selected.
- Click **Apply Filters** to see a full list of users in your organization
- Or make use of the filter options like **Search by First Name and/or Last Name** and **Manager** and click **Apply Filters**.

Select Users

Search

Selected (0)

Users

Search by First Name and/or Last Name

Filters

User ID

Username

Manager

User ID

Username

Manager's First Name and/or Last Nam

Position

Division

Location

Reset Filters

Apply Filters

Users - Assign to One or More Users in your Organization

- Place a **checkmark** next to each user to whom to assign training.
- Note the option to **navigate between pages of users** in the bottom right corner.
- Click **Select** in the bottom right to add user(s) to the **Selected** tab and returns you to the **Users** step in the **Create Assignment** process.
- Click **Next**.
- Proceed to page 20 to “**Confirm**” your learning assignment.

Select Users

Search

Selected (1)

| | |
|-------------------------------------|--|
| <input type="checkbox"/> | <div><div></div><div>Type : User ID : 10b934b9-5387-46f3-aa62-2a368800d986 Username : dez.escalona@gmail.com Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |
| <input type="checkbox"/> | <div><div></div><div>Elmer Kruppenbach Type : User ID : 5aaa6656-ad0b-4cc6-b579-0f59d89f84ad Username : ELKRUPPENBACH@YAHOO.COM Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |
| <input type="checkbox"/> | <div><div></div><div>Estila maries Lejeune Type : User ID : b036e56a-1238-4831-9084-542471ee492 Username : ESTILALEJEUNE@GMAIL.COM Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |
| <input type="checkbox"/> | <div><div></div><div>Jalynmarie Collins Type : User ID : e81ct011-8037-4aec-8458-9e7370e8345d Username : ALIANAJANAE06@GMAIL.COM Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |
| <input checked="" type="checkbox"/> | <div><div></div><div>Jennifer Decipulo Type : User ID : 375fbddf-0497-48a4-b734-6e9c042b4255 Username : DECIPULOJENNIFER@GMAIL.COM Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |
| <input type="checkbox"/> | <div><div></div><div>Jo-Ann ROSS Type : User ID : 1be9c859-5f45-40ee-8a45-2f2fb26ab2fa Username : joannross2019@gmail.com Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |
| <input type="checkbox"/> | <div><div></div><div>Lucretia San nicolas Type : User ID : 2b0b1ffe-ee9f-4a6c-88eb-0065a1ec2972 Username : LUCRETIASN@GMAIL.COM Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |
| <input type="checkbox"/> | <div><div></div><div>Lucretia San nicolas Type : User ID : e19b6908-4d06-428c-938c-293e33ec76f9 Username : LUCRETIA.SANNICOLAS@US.AF.MIL Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |
| <input type="checkbox"/> | <div><div></div><div>Marcella Atwood Type : User ID : 73b2997d-a609-4bc2-8451-0a2a85a30a53 Username : marcella.l.atwood.naf@us.navy.mil Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |
| <input type="checkbox"/> | <div><div></div><div>Marylynn Quinata Type : User ID : b79d7514-3fd2-43f3-a035-739c2b0933f2 Username : mquinata74@gmail.com Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |
| <input type="checkbox"/> | <div><div></div><div>Melva Del rosario Type : User ID : e59ae629-5c4a-4feb-9736-fe6e41397abe Username : MELVA.DELROSARIO@US.AF.MIL Status : Active Manager : N/A Organizational Unit(s) : Example (Division)</div></div> |

12

1 to 20 of 26

Cancel

Select

Users – Upload Users - CSV File

It is also possible to assign to a list of people. To use this option,

- Create a CSV file with a single column that includes each user's Email Address and no header row (see example below).
- In the **Upload Users** section, click **Select File**, locate the CSV file or files, and click **Open**.
- Once the file(s) is selected click **Upload File**. It's easy to miss this step!
- If you need to remove a file, click the **X** to the right of the file name.
- Proceed to the **"Generate Initial User List"** step on page 18.

Learning Assignment Tool Create Assignment

Create Assignment

- Setup
- Options
- Schedule
- Users**
- Confirm

1 The User Criteria you select will only include users who meet the following criteria: Division is or below Example

User Criteria

Select the user criteria that will define who is included in the Assignment.

Select Users

Add users by selecting organizational units, groups and/or individual users.

Select Users All Users

Upload Users

Add users by uploading files with their Username, User ID or Email Address in the .csv format. Each file can have a maximum of 2000 users.

Select File Upload File

csv_test.csv X

csv_test_2.csv X

Assign New Occurrence

Enable this setting to assign a new occurrence of the training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained.

☐ Enable Assign New Occurrence

Generate Initial User List

Cancel Save Draft Previous Next

| | A | |
|---|--------------------------|--|
| 1 | DPOSEY@AGGBGC.ORG | |
| 2 | dmccoy@aggbgc.org | |
| 3 | fixatedcherub@icloud.com | |
| 4 | | |

Users - Generate Initial User List

When you are done selecting to whom training should be assigned, click **Generate Initial User List (1)**. If all users in the **Initial User List** section have a check next to their name, verify you have the right users, make changes as necessary and then click **Next** to confirm the assignment.

Otherwise, if any users are missing a check next to their name **(2)**, it's because they already have an occurrence of the training item on their transcript.

If you want users that already have the training on their transcript to receive the training again or another occurrence,

- **Toggle the Enable Assign New Occurrence (3)** to the 'On' position, and it will turn green.
- When this option is turned on, users who have already completed the training will receive a new occurrence or requirement to complete the training again.
- Click **Reset Initial User List (1)**.

Setup

Options

Schedule

Users

Confirm

The User Criteria you select will only include users who meet the following criteria: Division is or below Boys & Girls Clubs of Greater Houston

User Criteria

Select the user criteria that will define who is included in the Assignment.

Select Users

Add users by selecting organizational units, groups and/or individual users

Select UsersAll Users

Aaron Bufford

Type : User ID : e0003f8d-dc74-4e14-b06e-c05496855973 Username : ABUFFORD.1998@GMAIL.COM Status : Active Manager : N/A

☐ Include Subordinates

Abigail Rodriguez

Type : User ID : 3c1c7d6e-4717-49b8-a6f0-8fe90d19cd99 Username : YELLOWSON8606@GMAIL.COM Status : Active Manager : N/A

☐ Include Subordinates

Upload Users

Add users by uploading files with their Username, User ID or Email Address in the .csv format. Each file can have a maximum of 2000 users.

Select FileUpload File

Assign New Occurrence

Enable this setting to assign a new occurrence of training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained.

☐ Enable Assign New Occurrence

(1)Reset Initial User List

Initial User List

The following list of users match the selected user criteria. These are the users who will be processed the first time the Assignment runs.

Included (1)

Search by First Name, Last Name, or User ID

Select AllUnselect All

(2)

☐

Aaron Bufford

User ID : e0003f8d-dc74-4e14-b06e-c05496855973 Organizational Unit(s) : Boys & Girls Clubs of Greater Houston (Division)

☐ Advanced Storytelling

Status : Completed Occurrence : 1

☒

Abigail Rodriguez

User ID : 3c1c7d6e-4717-49b8-a6f0-8fe90d19cd99 Organizational Unit(s) : Boys & Girls Clubs of Greater Houston (Division)

☒ Advanced Storytelling

Status : None Occurrence : 0

CancelSave Draft

Previous

Next

This button toggles between **Reset Initial User List** and **Generate Initial User List** depending on the actions taken on the screen

18

Users – Initial User List

Now all users are selected for assignment even if it is already on their transcript and in a completed status. You can choose to

- **Only assign the new occurrence to users in a “Completed” status** by toggling it on and users will be required to complete it again by the new due date. When selected the option to Maintain Progress is grayed out and no longer available.
- Allow users to **Maintain Progress** by toggling the option on. This means that if a user has started the training, you can allow them to maintain their progress if the same version of the training is assigned. Otherwise, they are required to review all the content again to receive a completed status.
- Change the due date to be the date set in the current assignment by toggling ‘On,’ if applicable, which will override all prior due dates for training contained in this assignment.

Click **Reset Initial User List** to verify you have the correct people in the assignment.

Once you are satisfied with your user selections, click **Next** in the bottom right corner.

Assign New Occurrence

Enable this setting to assign a new occurrence of the training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained.

☒

Enable Assign New Occurrence

☐

Only assign new occurrence to users in the 'Completed' status

☐

Maintain Progress

☐

If applicable, override all prior due dates for trainings contained in this assignment.

Reset Initial User List

Initial User List

The following list of users match the selected user criteria. These are the users who will be processed the first time the Assignment runs.

Included (2)

Search by First Name, Last Name, or User ID

Select All

Unselect All

☒

Aaron Bufford

User ID : ed003f8d-dc74-4e14-b06e-c05496855973

Organizational Unit(s) : Boys & Girls Clubs of Greater Houston (Division)

☒

Advanced Storytelling

Status : Completed Occurrence : 1

☒

Abigail Rodriguez

User ID : 3c1c7c6e-4717-49b8-a6f0-f6e90d19cd99

Organizational Unit(s) : Boys & Girls Clubs of Greater Houston (Division)

☒

Advanced Storytelling

Status : None Occurrence : 0

Cancel

Save Draft

Previous

Next

Confirm

The final step before submitting the learning assignment is to confirm all settings.

- Expand each section by clicking the down facing arrow to review the settings for each of the steps in the process.
- At any point in the process, click **Save Draft** and return to the learning assignment later.
- If **Cancel** is clicked before saving a draft, the learning assignment is not saved. If **Cancel** is clicked after saving a draft, the changes made since the last saved draft are not saved but the learning assignment is still available in draft status.
- When ready to submit and process the assignment, click **Submit** in the bottom right corner of the screen.
- **Important Note:** Email settings **CAN NOT be changed** after a learning assignment is submitted.

Learning Assignment Tool

Create Assignment

Create Assignment

✓ Setup

✓ Options

✓ Schedule

✓ Users

Confirm

A Day At Day Camp Assigned to Everyone in Division - Sept 2023

A required training for everyone.

Setup

Options ⓘ
Type : Standard Training Assignment Workflow : Assigned only Emails : Training Specific Emails

Schedule
Processing Start Date : As soon as Assignment is submitted Due Date : No due date

Users
Assign New Occurrence : Off

Cancel

Save Draft

1 Training

26 Users

Previous

Submit

Review the Warning

- Click **Yes** if you want to Submit the Assignment
- Click **No** to return to the Learning Assignment Process.

?

Submit Assignment

You are about to submit a Standard Assignment for 54 users. Are you sure you want to continue?

NO

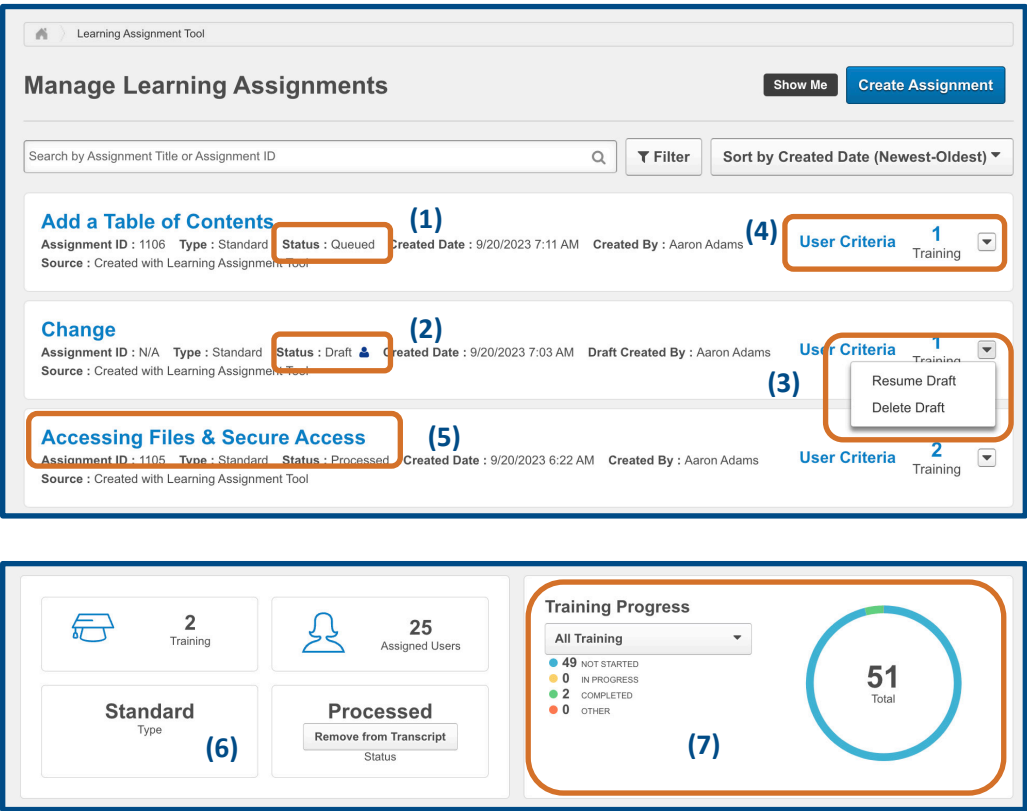
YES

20

Manage Learning Assignments

You are returned to the **Manage Learning Assignments** page. From this page, you can view the following:

- The learning assignment you just submitted is in a **Status** of **Queued**. (1) If you need to stop it from processing, look at page 24 for directions on stopping it from assigning.
- A learning assignment that is started but not yet submitted is in a **Status** of **Draft**. (2)
 - Click the drop-down arrow on the right side of the row to see options to **Resume Draft** or **Delete Draft**. (3)
- Other information is available such as:
 - the date the assignment was created and by whom,
 - how many training items were assigned which is a clickable **link to view the training titles** (4),
 - a link to view the **user criteria** for the assignment (4),
 - if the assignment is a standard assignment that processes one time or a dynamic assignment that processes daily or one time per year and assigns training to new users who meet the user criteria. (Dynamic assignments are covered in more detail on page 27.)
- Clicking the **title of a Learning Assignment** (5) in a status other than ‘Draft’ takes you to a summary view (6), including a view of Training Progress (7). (See pages 33-34 on Training Progress Summary Pie Chart for a more detailed report)



Manage Learning Assignments

The summary page also gives visibility into the settings that were selected at the time of the Learning Assignment creation as well as the history of to whom it was Assigned and Not Assigned.

Removal Settings

Dynamic Removal

☐ Off

Remove In Progress Training

☐ Off

Force removal from Assignment/Transcript

Remove

Re-assignment Settings

Dynamic Reassignment

☐ Off

Re-assign Latest Version

☐ Off

Assignment Settings

Setup

1 Training

Options

Type : Dynamic Training Assignment Workflow : Assigned, Approved, and Registered Emails : Training Specific Emails

Schedule

Processing Start Date : As soon as Assignment is submitted Due Date : No due date

Users

Assign New Occurrence : Off

Transcript History

Assigned

Not Assigned

Search by First Name, Last Name, or User ID.

Filter

Brian Aparicio

User ID : 5bbd56ef-54f1-42a1-9419-649bcea3efce Organizational Unit(s) : Boys & Girls Clubs of Greater Houston (Division)

HR-Operations Leadership Guide on How to Assign Training to Others at your Organization Version : 2.0

Status : Completed (Completed (Equivalent)) Assigned By : Learning Assignment Tool (1292) Assigned Date : 9/28/2023 7:16 PM Completed Date : 9/28/2023 12:02 PM Occurrence : 2

For example, in the screenshot below, the user was skipped and not assigned the training because the pre-requisite was not in a status of completed at the time of the learning assignment.

Transcript History

Assigned

Not Assigned

Search by First Name, Last Name, or User ID.

Filter

Elaine Fox

User ID : 6f44edf2-4962-4bb8-8d9a-f0d8d504552a Organizational Unit(s) : Boys & Girls Club of Frederick County (Division)

Trauma Aware Curriculum

Status : Not Assigned (Skipped)

Manage Learning Assignments

Click the **Filter** button to expose options for filtering or narrowing the number of Learning Assignments displayed in the list. Some commonly used filters are

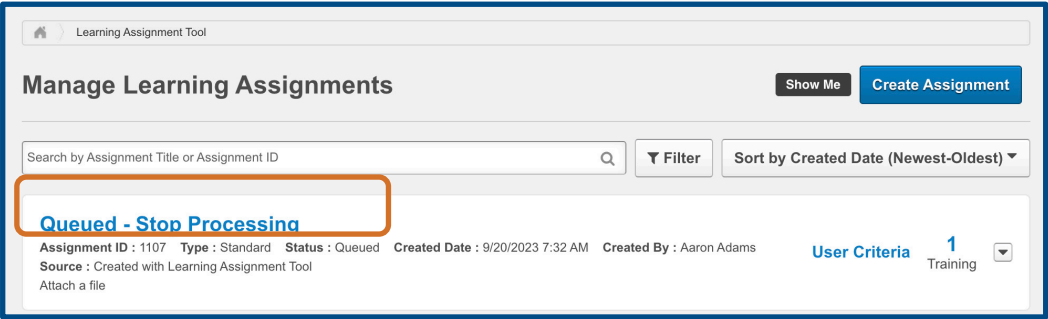
- **Created by** – enter your name to find learning assignments created by you
- **Training Title** – enter some or all of the name of the Training item that was part of the assignment
- **Type** – to select just standard or just dynamic assignments
- **Status** – to view for example just your drafts

Click **Apply Filters**

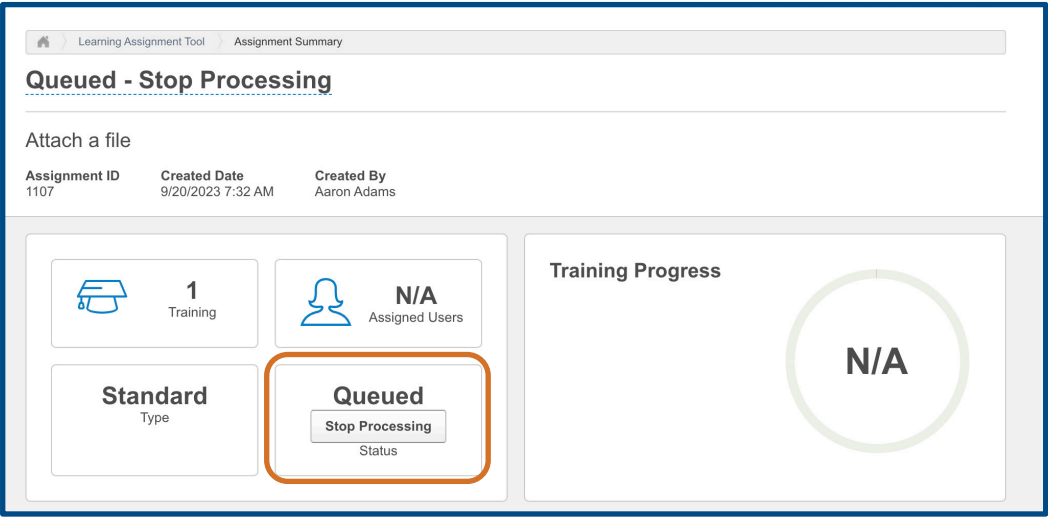
The screenshot shows the 'Manage Learning Assignments' interface. At the top, there is a search bar labeled 'Search by Assignment Title or Assignment ID' and a 'Filter' button (highlighted with an orange box). To the right of the search bar is a 'Sort by Created Date (Newest-Oldst)' dropdown. Below the search bar, there are several filter sections: 'Training Title' with a search input, 'Created By' with a search input, 'Created Date' with a date range selector (set to 'Last 120 Days' from 5/23/2023 to 9/20/2023), 'Type' with a dropdown showing '2 Selected', 'Status' with a dropdown showing '8 Selected', and 'Recurrence' with a dropdown showing '2 Selected'. At the bottom, there are 'User Criteria' with a 'Select Users' button and 'All Users' link, and 'Source' with a dropdown showing 'Created with Learning Assignment Tool'. A 'Reset Filters' link is at the bottom left, and an 'Apply Filters' button (highlighted with an orange box) is at the bottom right.

Stop Processing an Assignment

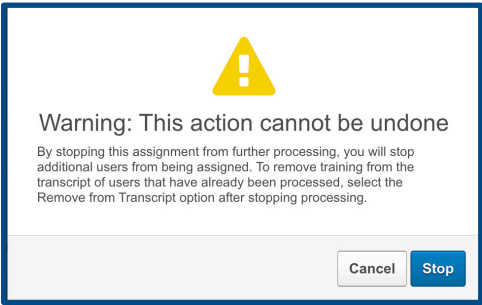
If after submitting a learning assignment, you realize a mistake was made and you want to stop it from processing, from the **Manage Learning Assignment** page click the **Title** of the Learning Assignment bolded in blue. Note: The learning assignment must still be in a status of **Queued**; otherwise, you can't stop it. You can however remove it from transcripts. See page 25-26 for more information on how to remove training from transcripts



On the next screen click **Stop Processing** in the **Status** box



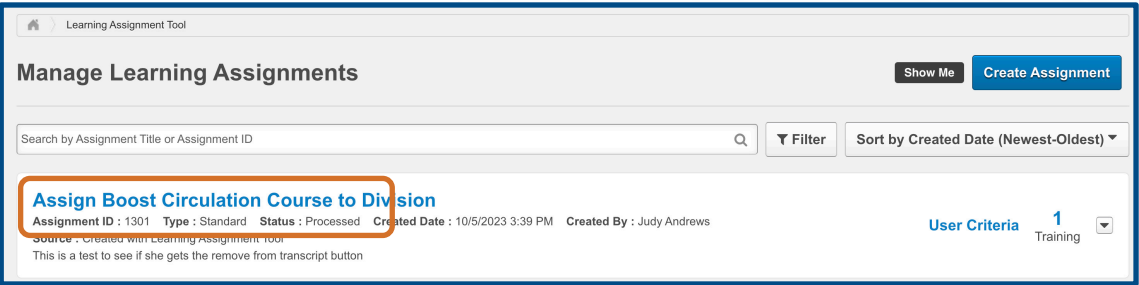
Review the Warning and click **Stop** to stop processing the assignment or **Cancel**.



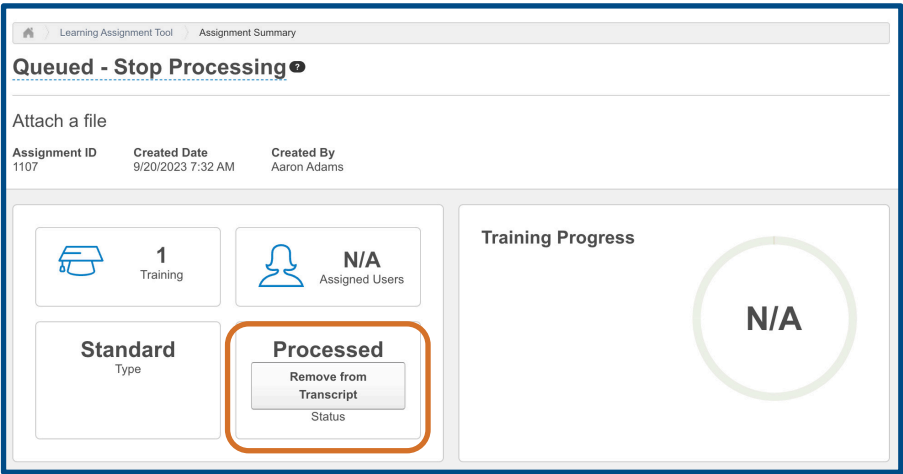
Remove from Transcript

When a learning assignment is in a status of Processed there is an option to remove the training from the transcripts of the users to which it was assigned.

- Click the **blue title** of the assignment to navigate to the Assignment Summary page



- Click **Remove from Transcript**.



Remove from Transcript

Review and accept the warning by clicking **Remove from Transcript** or click Cancel.

Warning: This action cannot be undone

If currently on the user's transcript, the trainings in this assignment will be removed, and the assignment will be unable to be reactivated. Removal may take several hours. If a user was assigned the trainings via another active assignment, the training will not be removed until that assignment's removal criteria has also been met.

Cancel

Remove from Transcript

Note it can take several hours for the training to be removed from users' transcripts but once it's done, in the **Transcript History** section of the **Assignment Summary** page it says **REMOVED FROM TRANSCRIPT**.

Transcript History

Assigned

Not Assigned

Search by First Name, Last Name, or User ID.

Filter

Adam Boyd

REMOVED FROM ASSIGNMENT

User ID : ecd643c8-d6a4-40a0-978e-0ea6c0bfc7bd

Organizational Unit(s) : Arlington Boys & Girls Club (Division)

Boost Circulation (Yoga)

Version : 1

REMOVED FROM TRANSCRIPT

Status : Not Started (Registered)

Assigned By : Learning Assignment Tool (1301)

Assigned Date : 10/5/2023 3:40 PM

Completed Date : N/A

Occurrence : 1

Create a Dynamic Assignment

A dynamic learning assignment processes either daily or one time per year and assigns training to users who newly meet the user criteria. Examples include dynamically assigning onboarding to new hires on a daily basis or assigning safety/compliance training on a yearly basis.

The creation of a Dynamic Learning Assignment is the same as the standard assignment except for

- In the **Setup** step, in the **Assignment Type** section, select **Dynamic (process continuously or periodically)**
- The **Schedule** step has three additional sections
 - **Processing Frequency** – Daily or Annually
 - **Processing End Date** – Options depend on Processing Frequency
 - **Recurrence** – Options depend on Processing Frequency

See next two pages for the nuances of annual processing versus daily processing.

The screenshot shows the 'Create Assignment' interface. On the left is a sidebar with a vertical list of steps: 'Setup' (selected with a blue circle), 'Options', 'Schedule', 'Users', and 'Confirm'. The main content area is divided into two sections. The top section, 'Assignment Type', contains the question 'Which Assignment Type would you like to create?' and two radio button options: 'Standard (process one-time only)' and 'Dynamic (process continuously or periodically)'. The 'Dynamic' option is selected and highlighted with an orange border. The bottom section, 'General Information', contains a label 'Assignment Title' followed by a text input field containing the text 'Annual Compliance Training'.

Dynamic - Process Annually

In the options step, if **Processing Frequency** is set to **Annually**, then

- Set a **Processing Start Date** and Time. The assignment will run annually on this date.
- If applicable, set a **Processing End Date** if you want to stop assigning after a certain date. Otherwise, the assignment will assign the training annually on the Start Date and Time to any new users who have met the User Criteria since the last assignment.
- If you want this training to be assigned every year to everyone on the start date, **enable Recurrence** by toggling it on. The training will be reassigned each year indefinitely, until the date you specify or after a certain number of occurrences as long as the training is configured to allow recurrence.

Note the black information icons to aid in learning assignment creation.

Learning Assignment Tool | Create Assignment

Create Assignment

- ✓ Setup
- ✓ Options
- Schedule**
- Users
- Confirm

Processing Frequency

How frequently would you like the Assignment to process and assign training to users that newly meet the User Criteria?

☐ Daily

☒ Annually

Processing Start Date

When would you like the assignment to start processing and assign the training to users?

at 12:00 AM

Processing End Date

When would you like the assignment to stop processing and deactivate?

☒ No end date

☐ Specific Date

Training Due Date

When would you like the training to be due?

☒ No due date

☐ Relative date

☐ Annual date

Recurrence

Enable Recurrence if you would like the training to occur for users more than once.

☒ Enable Recurrence

When would you like the training recurrence to end?

☒ Never

☐ Specific date

☐ After a specific number of occurrences

Note the help icons in the upper right of each section.

Cancel Save Draft Previous Next

Dynamic - Process Daily

Setting **Processing Frequency** to **Daily** is typically used to assign training to new hires or position/location changes. The system looks for people who met the criteria for assignment since the last time it ran the day before.

- Set a **Processing Start Date** which can be immediately, on specific date or relative to hire date.
- If applicable, set a **Processing End Date** if you want to stop assigning after a certain date. Otherwise, the assignment will assign the training daily to any new users who meet the User Criteria since yesterday's assignment. **PLEASE REFRAIN from using the RELATIVE DATE FIELD as these custom fields are NOT aligned with your organizations' HRIS system, for example, SLU does not capture hire dates for local Club professionals.**
- Select a **Training Due Date** option which can either be no due date, a number of days after date assigned, or annually on a specified date.
- If you want this training to be assigned more than once, enable **Recurrence** by toggling it on. The training can be reassigned relative date assigned, date completed or registration date or annually. Recurrence can end after a specified date, number of occurrences or never.

Setup

Options

Schedule

Users

Confirm

Processing Frequency

How frequently would you like the Assignment to process and assign training to users that new

Daily

Annually

Processing Start Date

When would you like the assignment to start processing and assign the training to users?

As soon as Assignment is submitted

As soon as Assignment is submitted, but assign the training relative to

Day(s)

from

Hire Date

at

12:00 AM

Specific Date

Processing End Date

When would you like the assignment to stop processing and deactivate?

No end date

Specific Date

Training Due Date

When would you like the training to be due?

No due date

Relative date

Day(s)

from

Date Assigned

Annual date

Recurrence

Enable Recurrence if you would like the training to occur for users more than once.

Enable Recurrence

When would you like the training to recur?

Relative date

Day(s)

from

Date Assigned

Recur only if the previous occurrence is complete

Annually

When would you like the training recurrence to end?

Never

Specific date

After a specific number of occurrences

Cancel

Save Draft

Previous

Next

Note the help icons in the upper right of each section.

29

Inactivate a Dynamic Assignment

From the Manage Learning Assignments page, make use of the filters to find the dynamic learning assignment.

- Click **Filter**
- From the **Type** drop down, place a checkmark in front of just **Dynamic**.
- Click **Apply Filters**.
- At the right end of a dynamic assignment, click the **drop-down arrow** and select **View Summary**

Learning Assignment Tool

Manage Learning Assignments

Show Me

Create Assignment

Options

Search by Assignment Title or Assignment ID

Filter (2)

Sort by Created Date (Newest-Oldest)

Training Title

Created By

Enter Training Title

Enter First Name and/or Last Name

Created Date

Last 120 Days

From 5/22/2023

To 9/19/2023

Type *

Dynamic

Status *

5 Selected

Recurrence *

2 Selected

User Criteria

Source *

Select Users

All Users

Created with Learning Assignment Tool

Reset Filters

Apply Filters

Dynamic Assignment - Remove Example

Assignment ID : N/A Type : Dynamic Status : Draft Recurrence : Off Created Date : 9/19/2023 6:36 PM Draft Created By : Deborah Deardorff

User Criteria 1 Training

Dynamic Assignment of Assign Training Curriculum - 12:15pm Daily

Assignment ID : 1101 Type : Dynamic Status : Active Recurrence : Off Created Date : 9/8/2023 12:17 PM Created By : Deborah Deardorff

Source : Created with Learning Assignment Tool

Once a user completes the form requesting the ability the assign training permissions and it is approved by CEO and BGCA Staff, they become part of a group that is ba...

User Criteria 1 Training

View Summary

Copy

Dynamic Assignment of Assign Training Curriculum - 8:45am daily

Assignment ID : 1100 Type : Dynamic Status : Active Recurrence : Off Created Date : 9/8/2023 8:43 AM Created By : Deborah Deardorff

Source : Created with Learning Assignment Tool

Once a user completes the form requesting the ability the assign training permissions and it is approved by CEO and BGCA Staff, they become part of a group that is ba...

User Criteria 1 Training

On the next page, click the **toggle** next to **Active** to inactivate the dynamic learning assignment.

Learning Assignment Tool

Assignment Summary

Dynamic Assignment of Assign Training Curriculum - 12:15pm Daily

Active

Once a user completes the form requesting the ability the assign training permissions and it is approved by CEO and BGCA Staff, they become part of a group that is based on custom field that assigns this curriculum.

| | | |
|---------------|-------------------|-------------------|
| Assignment ID | Created Date | Created By |
| 1101 | 9/8/2023 12:17 PM | Deborah Deardorff |

Remove a Dynamic Assignment

To remove training assigned by a dynamic assignment, the dynamic assignment must first be set to **Inactive**. (see previous page Inactivate a Dynamic Assignment)

Once inactive, the **Remove** button becomes available in the **Removal Settings** section of the **Assignment Summary** page if there are users listed on the **Assigned** tab in the **Transcript History** box. To force the removal of the Assignment and the item from the user(s)' transcript(s), Click **Remove**.

Learning Assignment ToolAssignment Summary

Testing Remove Button - Desk Yoga

Inactive

Assignment ID1302Created Date10/5/2023 5:31 PMCreated ByJudy Andrews

1Training

DynamicType

80Assigned Users

OffRecurrence

Training Progress

80NOT STARTED0IN PROGRESS0COMPLETED0OTHER

80Total

Removal Settings

Dynamic Removal

Remove In Progress Training

Force removal from Assignment/Transcript

Remove

Re-assignment Settings

Dynamic Reassignment

Re-assign Latest Version

Assignment Settings

Setup1Training

OptionsType : Dynamic Training Assignment Workflow : Assigned, Approved, and Registered Emails : Training Specific Emails

ScheduleProcessing Start Date : As soon as Assignment is submitted Due Date : No due date

UsersAssign New Occurrence : Off

Transcript History

AssignedNot Assigned

Search by First Name, Last Name, or User ID.

Filter

Adam Boyd

User ID : ede843c8-d6a4-40a0-978e-0ea1cd9fc7bd Organizational Unit(s) : Arlington Boys & Girls Club (Division)

Desk Yoga (Yoga) Version : 1Status : Not Started (Registered) Assigned By : Learning Assignment Tool (1302) Assigned Date : 10/5/2023 5:31 PM Completed Date : N/A Occurrence : 1

Review the Warning and select **Remove** or **Cancel**.

Warning: This action cannot be undone

If currently on the user's transcript, the trainings in this assignment will be removed, and the assignment will be unable to be reactivated. Removal may take several hours. If a user was assigned the trainings via another active assignment, the training will not be removed until that assignment's removal criteria has also been met.

Cancel

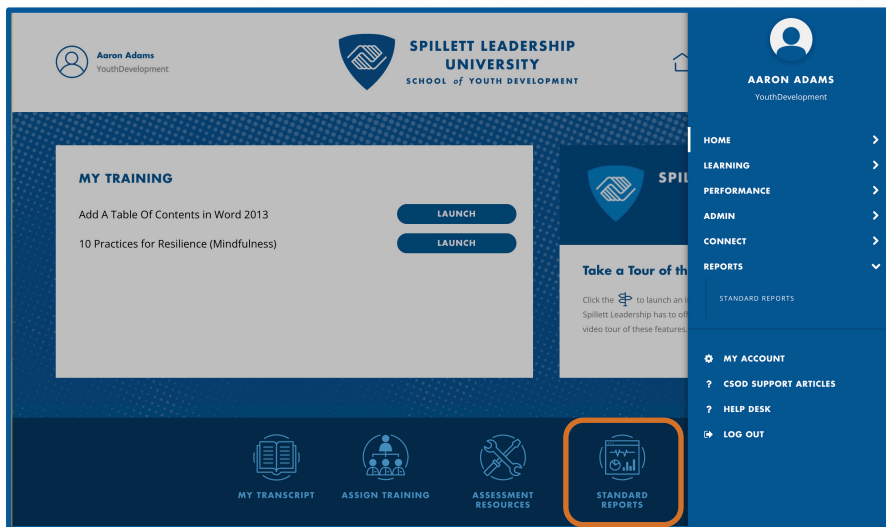
Remove

Standard Reports

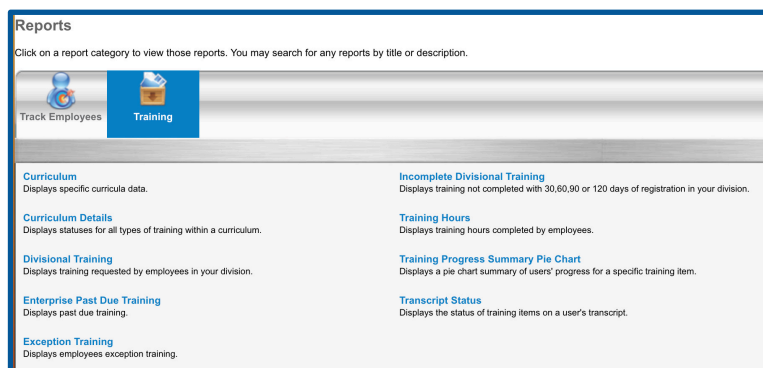
Reports are available to track the progress of training assigned to users in your organization including

- Enterprise Past Due Training
- Training Progress Pie Chart
- Transcript Status Report

From the SLU home page, click the **Standard Reports** icon.



It's possible that reports are available on the **Track Employees** tab if you are listed as someone's manager in SLU. The focus of this guide, however, is the new reports on the **Training** tab given to you as part of your new permissions for assigning training. Since standard training reports operate in a similar manner, this guide highlights only a few of them to give you an understanding of how to use the criteria and filters to generate data.



Training Progress Summary Pie Chart

This report provides a visual representation of the percentage of users in each training status (for example Not Started, In Progress, Completed) for a single training title.

- Selecting to **Include users who do not have this training item on their transcript** next to **Transcript Status** is helpful for identifying users who have not completed a prerequisite yet. (More information on the next page)
- The only required criteria is **Training Title**. Click the arrow to expose a search box to locate the course on which you want to report.

Training Progress Summary Pie Chart

Report Criteria

Select a training to view training progress information for your users in this organization. The date filters below refer to the training registration date. For Events and Sessions, results are filtered based on the Session start date. Please note that the report will only produce results that include Events when the date criteria is not set.

Click on a slice of the pie to see a detailed breakdown of users with that status. To return to the overview of all statuses, click on the "View All Statuses" link that appears in the detailed breakdown view

DATE CRITERIA

Date Criteria: Select From: To:

USER CRITERIA

User Criteria: Select Criteria

ADVANCED CRITERIA

Training Title: Athlete Protection, Part 1

Transcript Status: ☒ Include users who do not have this training item on their transcript or have not activated the training item.

User Status: ☐ Include inactive users

Equivalent Training: ☐ Include users who have completed equivalent courses in the report.

Include Removed Training: ☐ Only include user transcript records for the training selected, do not show transcript records for the equivalent course.

Include Removed Training: ☐ Include training that was removed from user transcript

ILT Training: Include user transcript records for:

☒ Events and Sessions

☐ Events Only

☐ Sessions Only

Search

- De-select any **training types** that should not be part of the search results
- Type in part or all of the Title of the training in **the Search by Title or Keyword:** box
- Click **Search**
- Click the **+ sign** next to the title to select it.
- Click **Search** in the **Advanced Criteria** section (see screenshot above)

Select Training

Search for training

Include the following training types:

☒ Online Class ☒ Event ☒ Quick Course ☒ Curriculum ☒ Test ☒ External Training ☒ Library ☒ Material ☒ Posting ☒ Video ☒ Cohort

Search by Title or Keyword:

access English (US) Search

« Previous 1-7 of 7 Next »

Search Results

| ADD TITLE | TYPE | PROVIDER | PRICE | DESCRIPTION |
|---|---------------|---------------------------------------|--------|--|
| <input checked="" type="checkbox"/> Access Work Files From Any Computer | Online Class | Grovo | \$0.00 | Sometimes you might need to work from multiple computers in multiple parts of the world. Learn how to access files from anywhere to unlock the true potential of remote work. |
| <input checked="" type="checkbox"/> Access Your Files On Any Device | Online Class | Grovo | \$0.00 | Access Your Files on Any Device tagged as: Digital tools,Grovo |
| <input checked="" type="checkbox"/> Accessing Your Instructors Community | Document: PDF | School of Management | \$0.00 | This document provides step by step instructions to understand how to access the Instructors Community upon completion of the Learning Coaches Orientation distance learning course. |
| <input checked="" type="checkbox"/> Customize The Quick Access Toolbar (Excel 2013) | Online Class | Grovo | \$0.00 | Customize the Quick Access Toolbar (Excel 2013) tagged as: Microsoft Office,Grovo |
| <input checked="" type="checkbox"/> Customize The Quick Access Toolbar (Word 2013) | Online Class | Grovo | \$0.00 | Customize the Quick Access Toolbar (Word 2013) tagged as: Microsoft Office,Grovo |
| <input checked="" type="checkbox"/> Secure Access To Your Data | Online Class | Grovo | \$0.00 | There are ways to limit access to your information. To protect your data, adopt strong password practices. |
| <input checked="" type="checkbox"/> Secure Access To Your Data (BGCA) | Online Class | Boys & Girls Clubs of America (Grovo) | \$0.00 | Secure Access to Your Data (BGCA) |

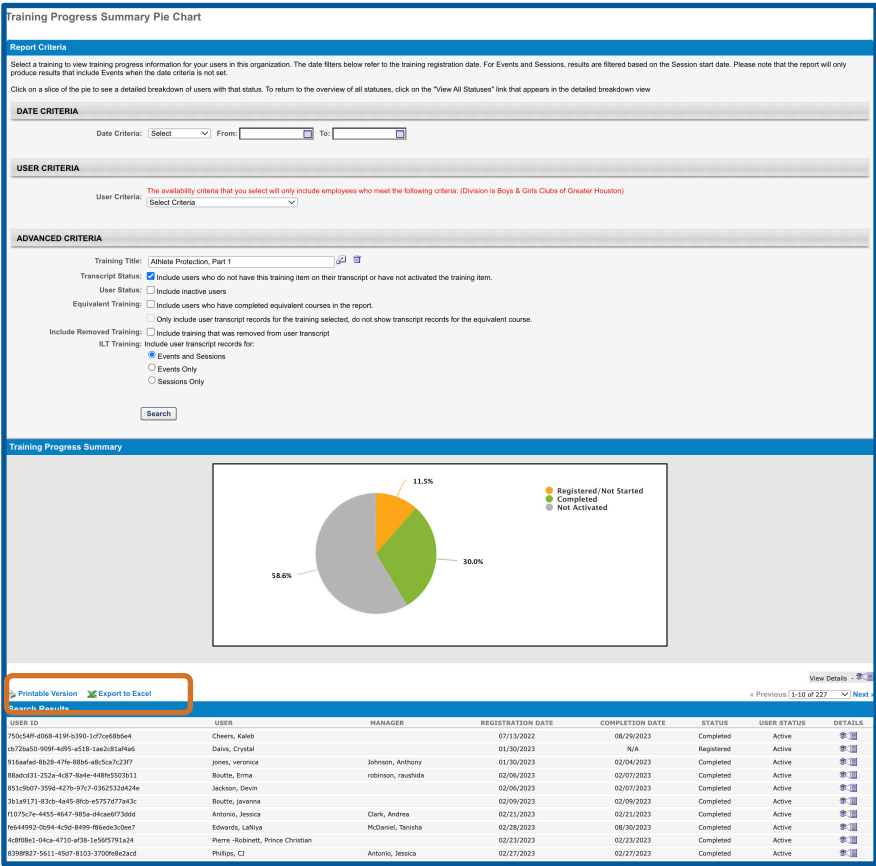
Training Progress Summary Pie Chart

This report returns a clickable pie chart and list of users that can be printed and/or exported to Excel.

- Click a **piece of the pie** chart to filter the list of users to match the status you clicked.
- This enables you to **print** and/or **export** a list of users in a specific status, such as Not Started or Past Due for example.

This report is helpful for **identifying who has not completed a prerequisite.**

- Clicking the **“Not Activated”** pie piece filters the list of names below it to display anyone who does not have the title on their transcript or if it is on their transcript, they haven’t registered for it yet.
- Clicking the **“Registered/Not Started”** pie piece delivers a list people who have the training title on their transcript but haven’t completed it yet.



Enterprise Past Due Training Report

This report is helpful if you need to create a list of people who have not completed assigned training by the assigned due date.

- Make your criteria selections such as date range and training type.
- Give the Report a Title and click Process Report.
- It will show in a status of Never for Last Run and Queued under Options. Refresh your screen until it shows a Last Run date and there is an Excel icon under Output.
- Click the Excel icon to open the report.
- You can store up to three reports here and click the refresh icon at anytime to pull new data. This helpful for weekly or monthly reports you might need to run.

Enterprise Past Due Training

Report Criteria

Displays past due training.

DATE CRITERIA

Date Criteria: This Year From: 1/1/2023 To: 12/31/2023

USER CRITERIA

User Criteria:

The availability criteria that you select will only include employees who meet the following criteria: (Division is or below Example)

 Select Criteria

ADVANCED CRITERIA

Training Type: All Training Title: Provider: All

Recurring Training: Include all records of this training on a transcript. If unchecked only the most recent registration will be included.

Removed Trainings: Include training that was removed from the transcript by an administrator

User Status: Search all inactive users

PROCESS REPORT

Report Title: Past Due - This Year (If no report title is entered, the title of the report will default to Enterprise Past Due Training)

Process Report

Processed Reports

| Report Name | Create Date | Last Run | Output | Options |
|----------------------|-------------|----------|--------|---------|
| Past Due - This Year | 09/21/2023 | Never | | Queued |

Transcript Status Report

This report is a comprehensive report that allows you to report on multiple titles in one report and make selections on what fields should be part of the report. Because it is more robust, it takes a few minutes to process depending on the amount of data.

- Make your criteria selections such as date range, training type, what fields to include and what filters to apply
- Give the Report a Title and click Process Report
- It will show in a status of Never for Last Run and Queued under Options. Refresh your screen until it shows a Last Run date and there is an Excel icon under Output
- Click the Excel icon to open the report
- You can store up to three reports here and click the refresh icon at anytime to pull new data. This is helpful for weekly or monthly reports you need to run

Transcript Status Report

Report Criteria

Displays the status of training items on a user's transcript.

DATE CRITERIA

Date Criteria: This Year From: 1/1/2023 To: 12/31/2023

USER CRITERIA

User Criteria:

The availability criteria that you select will only include employees who meet the following criteria: (Division is or below Example)

Select Criteria

ADVANCED CRITERIA

Training Type: All Training Title:

Training Due Date: ☐ Include Training Due Date

Completion Date: ☐ Include Completion Date

Recurring Training: ☐ Include all records of this training on a transcript. If unchecked only the most recent registration will be included.

User Status: ☐ Include Inactive Users

Training Purpose: ☐ Include the purpose and category of a training request or assignment.

Organizational Units: ☐ Include users OU Record (Displays the OU at the time training was added to the transcript.)

Removed Training: ☐ Include all removed records of this training

Filter by Training Status

Check All/Clear All

☒ Approved

☒ Cancelled

☒ Completed

☒ Denied

☒ Discontinued

☒ Exception Requested

☒ Exempt

☒ Expired

☒ Failed

☒ In Progress

☒ Incomplete

☒ No Show

☒ Not Activated

☒ Not Available

☒ Not Started

☒ Past Due

☒ Pending Acknowledgement

☒ Pending Approval

☒ Pending Completion Approval

☒ Pending Completion Signature

☒ Pending Evaluation

☒ Pending Grade

☒ Pending Prerequisite

☒ Pending Approval

☒ Registered

☒ Registration Pending

☒ Waitlist Expired

☒ Waitlisted

☒ Withdrawn

Include Custom Fields

☐ Academy Learning Credit(s)

☐ Account Number 1

☐ Account Number 2 (Grant)

☐ Formula For Impact Indicators (check all that apply)

☐ Gatekeeper

☐ Key Performance Indicators (check all that apply)

☐ Leadership University ID

☐ Learning Outcome(s)

☐ Other Learning Credit Type (please enter credit type)

☐ Other Learning Credit(s) (enter number)

☐ Session Name

☐ SLU Online Course Status

☐ Special Instructions for Virtual Sessions

☐ Subject Matter Expert 1

☐ Subject Matter Expert 2

☐ This training meets the BIGCA training requirement for (select all that apply):

☐ Total Number of Attendees

☐ Total Number of Registrants

☐ Training Contact Info

☐ Training Level

☐ Training Position

☐ Travel/Hotel Logistics

PROCESS REPORT

Report Title: Example - This Year (If no report title is entered, the title of the report will default to Transcript Status)

Process Report

-Export to Excel

-Refresh

-View Details

-Delete

Processed Reports

| REPORT NAME | CREATE DATE | LAST RUN | OUTPUT | OPTIONS |
|---------------------|-------------|------------|-------------|-------------|
| Example - This Year | 09/21/2023 | Never | | Queued |
| Example | 09/21/2023 | 09/21/2023 | <div></div> | <div></div> |

36

Glossary of Standard Training Reports

| | |
|-------------------------------------|--|
| Curriculum | This report displays detailed transcript status for a set of users taking a specific curriculum. |
| Curriculum Details | The Curriculum Details report displays statuses for all types of training within a curriculum. You can add additional columns of data as required. Reporting can be performed on more than one curriculum at a time. |
| Divisional Training | Displays training requested by employees in your organization. |
| Enterprise Past Due | This report displays past due training. Past due events are not included in the report. However, past due sessions are included. |
| Exception Training | Display employees that have not taken a specific training |
| Training Hours | This report displays training hours completed by users for active and inactive training items and if selected, can summarize the data by user, provider, or training type. |
| Training Progress Summary Pie Chart | Display the percentage of users with certain statuses for a particular training item. The report output only includes records with latest registration number. |
| Transcript Status | Display status and progress information on a user's transcript. This report can be run for one or multiple users. Filter the report by status, training title, training type, or by when trainings were added to the transcript. |



**SPILLETT LEADERSHIP
UNIVERSITY**
BOYS & GIRLS CLUBS



APPENDICES



Appendix 1 - Learning Objects Guide

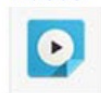
Online Courses



Online courses are asynchronous e-Learning courses. Online courses are often used as a standalone training mechanism, as part of a blended training solution or in a curriculum. Online courses are developed internally (BGCA) or may be developed through a third party provider.

Online courses should focus on providing knowledge transfer rather than focusing on skills.

Videos



Learners can register and watch videos and or video based training and have their completion noted on their transcript.

Events & Sessions (Instructor Led Training)

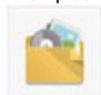


Events & Sessions are instructor led training events – these events and sessions may be led in person or virtually (i.e. webinar). Sessions are “instances” of the Event. Sessions may be single day or multi day or multi part. Learners can check the catalog to view and register for upcoming virtual led sessions.

Material

A material is a generic name for a group of Learning Object sub-types (such as CDs, Books, Activities, Web Sites).

Examples include:



- ☐ Link to a Posting – Code of Conduct in order to track via an Acknowledgement
- ☐ URL Link to a book description
- ☐ URL Link to a white paper on the intranet

Curriculum



Curriculums are a series of training that could include one or more types of training or learning objects and are bundled. A curriculum can include tests, external training, online courses, events, postings, and materials. Once requested or assigned, a curriculum can be managed in a user's transcript.

Examples include:

- ☐ **New Hire Onboarding Curriculum** – This curriculum may span several weeks. The user will need to complete certain learning objects during a given week.
- ☐ **Forklift Training Curriculum**- This curriculum may include an online course followed by a material posting to read or video to watch, a free form training element requiring the participant to discuss forklift training with their manager and finally complete a test.
- ☐ **Clinical Services Curriculum** – A new nurse to the cardiac care unit must complete a bundle of in-house developed online courses related to how to read an EKG, Heparin Protocol and Universal Counts



Tests

Ability to capture information regarding the participant's level of knowledge related to information presented in a session, online course, or other learning media..

Examples of Question Types:

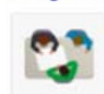
- ☐ Multiple Choice – Single Answer
- ☐ Multiple Choice – Multi Answer
- ☐ Short Answer
- ☐ Essay
- ☐ True/False – Yes/No
- ☐ Click on Image
- ☐ Video

Library



A library is a bundle of online classes or quick courses. Current library available is ej4 online learning classes made available to select Executive and Management Professionals.

Programs & Cohorts (Collaborative Learning)



Provides a collaborative, classroom-like, online learning experience where learners can collaborate with each other and communicate with an instructor.

A cohort LO is a combination of a Connect community and a curriculum, where users can complete training within a curriculum structure and collaborate with other learners who are in the same cohort. This community contains all of the traditional community functionality, but also contains a Learning tab where users can view and complete training and an Instructor tab where instructors can engage with learners.

Within a cohort community, video LOs that use an uploaded video file are launched in a unique pop-up that enables cohort community members to view the video, comment on specific moments of the video, and view other cohort members' comments on the video. As users view a video LO, the user is able to add comments, ask questions, view other students' comments and questions, and view instructors' responses to student comments and questions. Note: The ability to view video LOs in a pop-up, add comments, and view comments is not available for video LOs that use a YouTube link.

Posting



Postings are user contribution to the Knowledge Bank or Connect. These postings could be a discussion, Q&A, online resource, white paper, presentation, or other document.

Postings may be placed in Topics for allowing users to find the information they need quickly.

This document can also be found at <https://bgca.adobeconnect.com/p7s8ibr7f6ss/>

Appendix 2 - SLU Glossary of Terms

GLOSSARY OF TERMS

| | |
|--------------------------------------|--|
| Standard Learning Assignment | A standard learning assignment is a one-time assignment of a training or trainings to a user or group of users. |
| Dynamic Learning Assignment | A dynamic learning assignment assigns training on an ongoing basis to users as they meet the criteria for the assignment. They are often used to assign training to new hires or internal transfers to new positions or locations. |
| Recurring Learning Assignment | A recurring learning assignment is assigns training to users repeatedly at a pre-determined frequency. It is typically used for compliance or safety training that requires annual retraining |
| Training Type | Training Type categorizes training items into buckets of how they are delivered and tracked such as on-demand, SCORM based Online Courses, live in person & virtual web conference Events, documents and presentations known as Materials, a grouping of content called a curriculum and others types such as test & videos. |
| Organizational Unit or OU | OUs form the administrative foundation and hierarchy in SLU and organize user data into containers for assigning training to BGC organizations, positions and users. |
| Division | Division is an OU in SLU that equates to Organization at BGC |
| Position | Positions in SLU include Board Leadership, CVO, Safety Committee Chair, Executive Leadership, CPO/CEO, Mgt, Site Director, Resource Development & Youth Development |

Appendix 3 – Titles with Fees

As of October 2023, the following are the only training titles with fees.

| Training Title | Fee |
|--|----------|
| Advanced Leadership Program-Leading for Impact (In Person) | \$250.00 |
| InsideOut Coaching Virtual Training | \$75.00 |
| MALP Event | \$50.00 |
| Methods TOT Live Training | \$150.00 |
| The Leadership Challenge VIRTUAL Training | \$75.00 |
| YDALP Event | \$50.00 |

However, this can change over time so there is also Reporting 2.0 report available called **“HR-Operations Leadership - Training Titles with Fees”** that delivers a list of all training titles with fees associated to them.

Appendix 4 - Training Titles with Pre-Reqs

As of Oct 2023 below is a list of training titles with pre-reqs.

| Training Title | Training Type | Prerequisite Training Title |
|---|---------------|--|
| Athlete Protection, Part 2 | Online Class | Athlete Protection, Part 1 |
| IN PERSON Tier 1 Training of Trainers Program (TOT) | Event | Overview of TOT Program Prerequisites |
| IN PERSON Tier 2 Training of Trainers Program (TOT) | Event | Tier 1 TOT Training of Trainers Program v1.28.20 |
| IN PERSON Tier 2 Training of Trainers Program (TOT) | Event | Tier One Training of Trainers Program |
| Orientation to the Outcome-Driven Club Experience | Curriculum | Introduction to the Formula For Impact |
| Tier 2 Training of Trainers Program | Curriculum | Tier 1 TOT Training of Trainers Program v1.28.20 |
| Tier 2 Training of Trainers Program | Curriculum | Tier One Training of Trainers Program |
| Tier 3 Training of Trainers Program | Curriculum | Tier 2 Training of Trainers Program |
| Tier 3 Training of Trainers Program (TOT) | Event | Tier 2 Training of Trainers Program |
| Trauma Aware Curriculum | Curriculum | Building Readiness for Trauma-Informed Curriculum |
| Trauma Responsive Curriculum | Curriculum | Trauma Aware Curriculum |
| Trauma Responsive Curriculum | Curriculum | Building Readiness for Trauma-Informed Curriculum |
| Trauma-Informed Curriculum | Curriculum | Trauma Aware Curriculum |
| Trauma-Informed Curriculum | Curriculum | Trauma Responsive Curriculum |
| Trauma-Informed Curriculum | Curriculum | Building Readiness for Trauma-Informed Curriculum |
| Virtual Tier 1 TOT Program - Day 1 | Event | Overview of TOT Program Prerequisites |
| Virtual Tier 1 TOT Program - Day 2 | Event | Overview of TOT Program Prerequisites |
| Virtual Tier 1 TOT Program - Day 3 | Event | Overview of TOT Program Prerequisites |
| Virtual Tier 2 TOT Program - Day 1 | Event | Tier 1 TOT Training of Trainers Program v1.28.20 |
| Virtual Tier 2 TOT Program - Day 1 | Event | Tier One Training of Trainers Program |
| Virtual Tier 2 TOT Program - Day 2 | Event | Tier 1 TOT Training of Trainers Program v1.28.20 |
| Virtual Tier 2 TOT Program - Day 2 | Event | Tier One Training of Trainers Program |
| Virtual Tier 2 TOT Program - Day 3 | Event | Tier 1 TOT Training of Trainers Program v1.28.20 |
| Virtual Tier 2 TOT Program - Day 3 | Event | Tier One Training of Trainers Program |
| YDP: Tier 2 LGBTQ+ Inclusion Specialization | Curriculum | Diversity Equity & Inclusion (DEI) Specializations Prerequisite Curriculum |
| YDP: Tier 2 Racial Equity Specialization | Curriculum | Diversity Equity & Inclusion (DEI) Specializations Prerequisite Curriculum |

Since the configuration of training titles can change over time, a report is available to help identify titles with pre-reqs since completion of a pre-req is required before a training title can be assigned.






- Click the **Reporting 2.0** icon on the SLU Home page
- Select a report call **HR-Operations Leadership – Courses with Pre-requisite(s)**

Appendix 4 - Training Titles with Pre-Reqs

To search for a training title,

- In the filters at the top, click **Select Training (1)**
- Type the **Title of the Training** in **Search by Training Title (2)**
- Click the **check box** next to the title **(3)**
- Click **blue Select** button in the bottom left corner
- Click **Refresh** button in upper right corner **(4)**
- If it returns a result in the **Prerequisite Training Title** column **(5)** then it confirms the training title has a prerequisite required before it can be assigned.

Reporting 2.0

(4)     

HR-Operations Leadership - Courses with Pre-requisite(s)

Report ID: 1648

Filters

Training Active is equal to Y

AND

Training Title is one of

Select Training 1 selected. (1)

1 records (5)

| Training Title 1 | Training Type | Prerequisite Training Title | Training Active |
|----------------------------|---------------|-----------------------------|-----------------|
| Athlete Protection, Part 2 | Online Class | Athlete Protection, Part 1 | Y |


Select Training

SEARCH SELECTED (0)


(3) ☐

Q Search by Training Title (2)

FILTERS

 (test 2) MALP Program Community

Provider: School of Management Version: 1.0

 10 Practices for Resilience (Mindfulness)

Provider: Whil Version: 1.0 Price: \$0.00

Enjoy these one-minute resets when youâ€™re feeling moments of being stuck or overwhelmed.

Appendix 5 – Assign Event & Session

If you assign people to a session on a designated date and time, please also assign them to the event. In the example below, when Selecting Training to assign, the filter for **Training Type** is set to **Event**.

- Place a **checkmark** next to the event
- Click the **right facing arrow** to see a list of sessions.

Select Training

Search

Selected (0)

Search by Training Title

Filter (1)

Training Types

Event

Provider

Select Provider

Location

Select Location

Languages

English (US)

Locator Number

Description

Reset Filters

Apply Filters

2023 Government Relations and Advocacy Skill-Building Webinars (VIRTUAL)

Provider : Zoom vILT Integration Training Hours : 1 hour Price : \$0.00

Build your Club organization's advocacy capacity by taking advantage of monthly Advocacy and Government Relation Training Webinars offered by BGCA's Government Relations team and external partners. Advocacy skill-building webinars occur at 2:30 p.m. ET the second Tuesday of every month and cover a variety of topics including storytelling for advocacy, Board engagement, Appropriations explainers, youth advocacy and more in order to empower Clubs...

- Place a **checkmark** next to session
- Click **Select** in the bottom right corner of the page

Select Training

Search

Selected (0)

< Back to All Results

10891

Session ID : Dec- Advocacy 2024 Legislative Outlook Location : Price : \$0.00 Start Date : 12/12/2023 2:30 PM

Seats Available : 489 / 500

10965

Session ID : Nov-GRCS-Planning/Applying: Drug Free Community Location : Price : \$0.00 Start Date : 11/16/2023

2:00 PM Seats Available : 492 / 500

10890

Session ID : Nov- Advocacy- Power of the Pen: Writing for Advoc Location : Price : \$0.00 Start Date : 11/14/2023

2:30 PM Seats Available : 490 / 500