Learning Central User Guide

For training providers

Version 1.2

University of Victoria

VERSION CHANGE CONTROL

Version #	Date	Author	Description
0.1	Feb 27	EW	Initial Draft prepared
0.2	Mar 6	EW	Draft updated based on MA review
1.0	Mar 7	EW	First version finalized for training
1.1	Mar 12	MA	Edited version for training
1.2	Mar 15	MA	Edits after training

CONTENTS

INTRODUCTION

This guide is an administrative guide to help you make the most of Learning Central. In this guide, you will find helpful steps and screenshots to lead you through the most common processes you will need as a course administrator.

HOW TO USE THIS GUIDE

This guide is designed so that you can quickly and easily find the help you need. On the following page you will find a graphic representing the Course Administration Cycle. Each of the major steps can be clicked to jump you to the part of the guide that contains the relevant tutorials for that step. Throughout this guide, you will find the following buttons:

HOW TO	The blue button will jump you to the related tutorial sections
BACK TO CYCLE OVERVIEW	This button will bring you back to the Course Administration Cycle overview page

ICONS & SYMBOLS

Automatic email sent by Learning Central for **all courses**

Recommended email that needs to be manually sent

Helpful tip

WELCOME TO LEARNING CENTRAL

Learning Central is a free learning registration system designed to serve as the hub for all employee learning opportunities. Learning Central offer *employees* one-stop-shopping; afford *training providers* an easy tool to promote and manage courses, and record learning from across campus; and provide *supervisors* with an effective way to monitor employee development.

Learning Central is NOT for managing meetings, committees or events.

When in doubt, ask this question: *do participants need a learning record of the event?* If yes, then Learning Central may be your solution. If not, the university promotes the use of another great application for event and conference management named Eply: https://www.uvic.ca/systems/services/businessapps/campuseventmgmt/index.php

UNDERSTANDING THE LEARNING CENTRAL APPLICATIONS

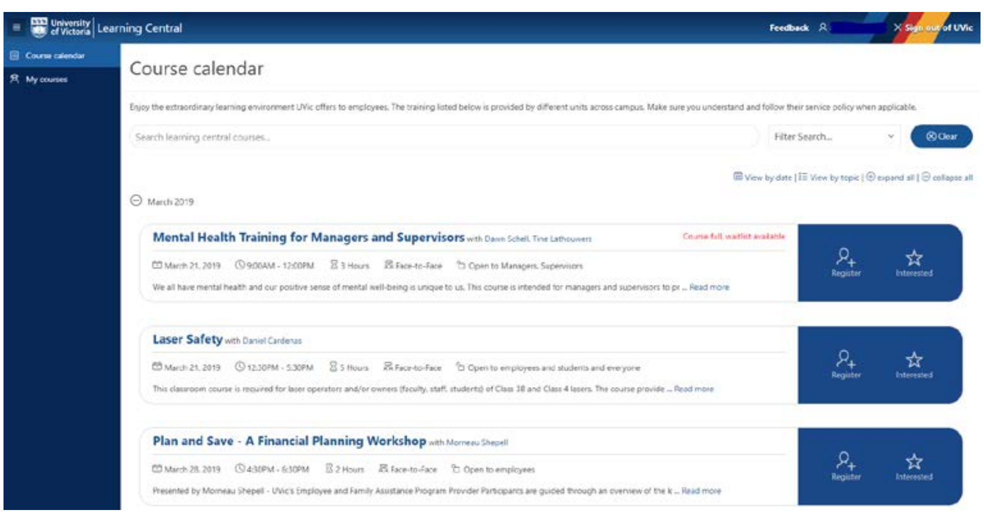
Learning Central consists of two different applications: one for registrants and another for administrators. UVic credentials, Netlink ID and password, are required for access.

REGISTRANT APPLICATION

Link: https://apex.uvic.ca/gen/f?p=123

Primary Users: Employees, faculty and staff. Learning Central allows access to students as an exception for when they are in an internal co-op position for example. Agency and Externally funded employees do not have access to the platform.

Main Actions: Browse for courses, register and unregister from courses, access learning records.



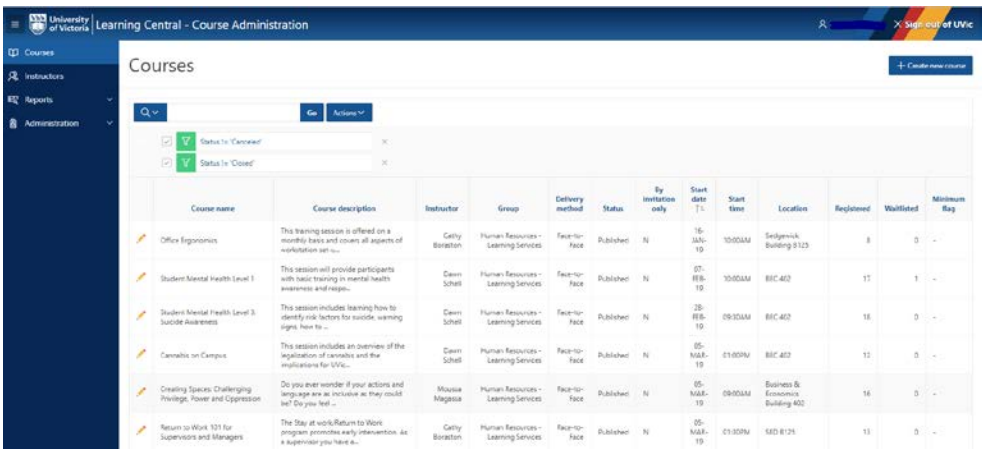
ADMINISTRATOR APPLICATION

Link: https://learningcentral.uvic.ca

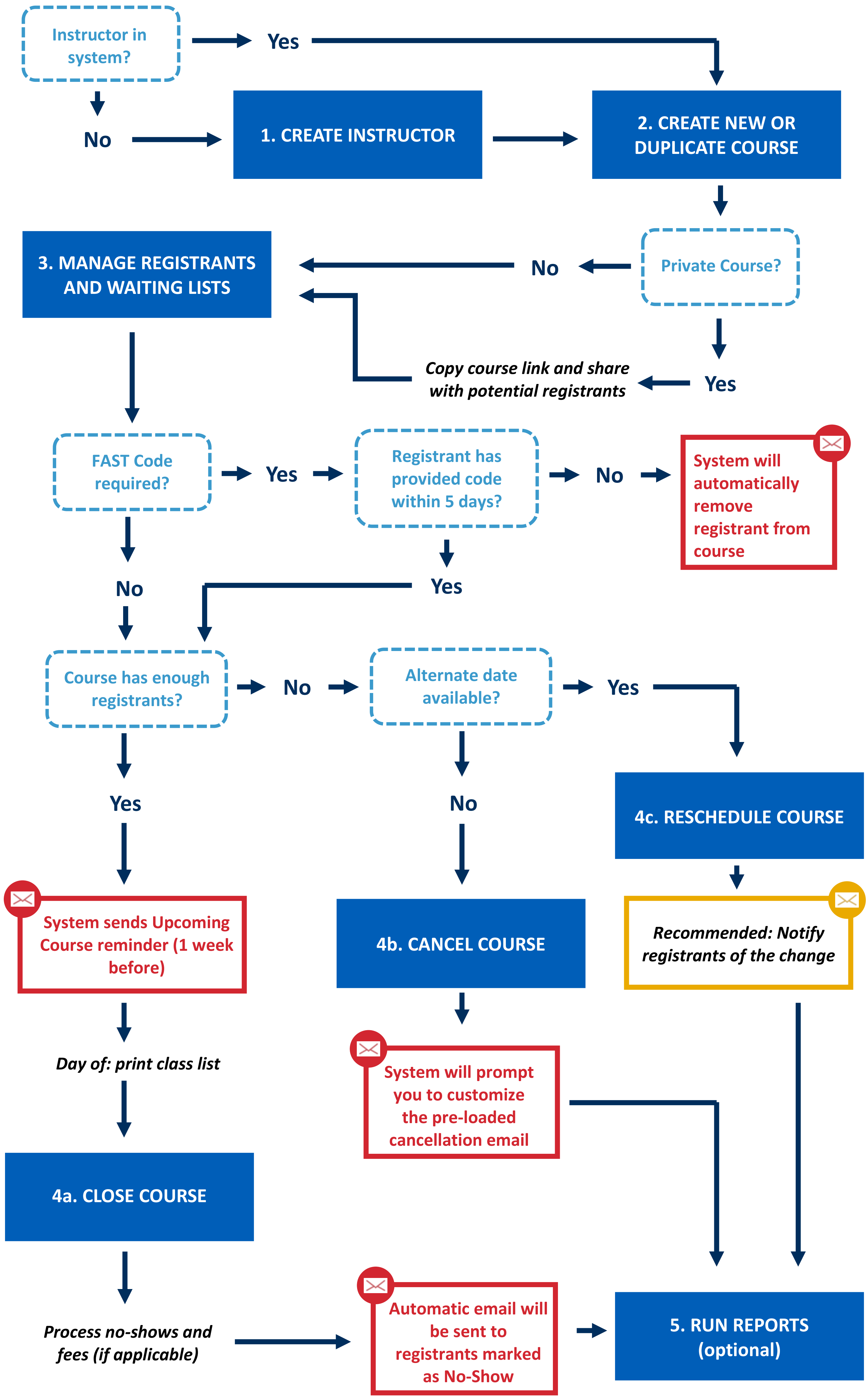
Primary Users: Training providers who have been trained and their account has been set-up by the Learning Central Admin team.

Learning Central allows different administrative groups, each with multiple administrators in either two levels of access. Read-only users can explore the training scheduled by their group and download classlist, with no rights to modify content this is recommended for facilitators. Training providers with full administrative rights can manage courses, facilitators, and participants.

Main Actions: Create, open, and close courses, manage registrants and waiting lists, run reports.



COURSE ADMINISTRATION CYCLE



1. CREATE INSTRUCTOR

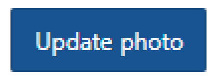
HOW TO CREATE AN INSTRUCTOR

1. Click on ‘Instructors’ from the left side bar.

2. Select ‘Create new Instructor’.

3. Fill out the instructor information and click Create.

4. *Recommended:* Click update photo if you would like to include a photo in the instructor profile.



5. Click update.

6. To return to the list of instructors, click ‘Back to instructors’ on the top right of your screen.

2. CREATE NEW OR DUPLICATE COURSE

Tutorials in this section (click each title to jump to the selected tutorial):

Create a New Course	Duplicate A Course

HOW TO CREATE A NEW COURSE

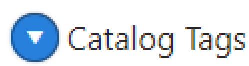
1. From the home screen, click on ‘Create new course’.

2. Fill out the course information and click Create.

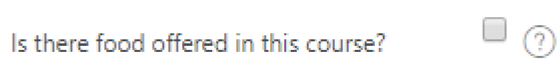
3. On the following screen, fill out the remaining information. Be sure to review the following elements:

By invitation only: This will mark your course as private. It will not display on the public Learning Central catalog and you will need to email potential registrants the course link.

Catalog tags: Tags are used to help categorize your courses, as well as help users browse and search. You may apply more than one tag to your course.
Don’t see a tag you need? Contact Learning Central Admin.



Refreshments: Ticking this box will prompt the system to ask registrants for any dietary restrictions.



Fees: If you indicate either a registration or a cancellation fee, the system will request a FAST code from the registrant. The registrant has 5

days from their date of registration to provide a FAST code, otherwise the system automatically removes them from the course.
Note: It is recommended to include the link to a service policy if you are charging any fees.

4. If you would like to save your changes WITHOUT publishing the course, click 'Save Course'. **This will leave the status of the course as 'Draft'.**

5. If you are ready to publish your course, click 'Publish'. **This will change the status of the course to 'Published'.**

HOW TO DUPLICATE A COURSE

1. From the home screen, search for the course you would like to duplicate and click on the pencil icon next to the course name.

2. Underneath the main course information, click on the 'Duplicate course' button
   Note: <u>all</u> fields are copied over to the duplicate course except for time and date.

3. Make any necessary changes to your new duplicated course.
   - *Be sure to update the Course name as it will automatically have DUPLICATE in the title.*

4. If you would like to save your changes WITHOUT publishing the course, click 'Save Course'.

5. If you are ready to publish your course, click 'Publish'.

3. MANAGE REGISTRANTS AND WAITING LISTS

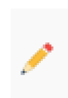
Tutorials in this section (click each title to jump to the selected tutorial):

Create a Reservation	**Manage Reservations**
Manage the Waitlist	**Manually Enroll User in a Course**
Email Registrants	**Update Course Information**
Print the Class List	

HOW TO CREATE A RESERVATION

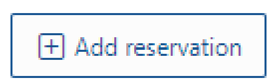
1. From the home screen, search for the course within which you would like to create a reservation and click on the pencil icon next to the course name.

   Note: You can also use the feature when creating a new course, steps 2-4 are the same.



2. Scroll down to find the 'Reservations' tab.

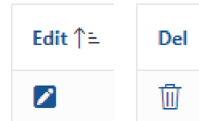
3. Select 'add reservation'.



4. Fill out the number of seats you would like to reserve, the name of the reservation (i.e. Leadership team), as well as any relevant notes. Once you are finished, click 'save'.

5. Don’t forget to save the course with your new updates.

You can manage your reservations at any time by navigating to the ‘Reservations’ tab and clicking either the blue pencil icon to make edits, or the trash can icon to delete the entire reservation.



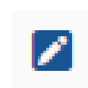
HOW TO MANAGE A RESERVATION

1. To use a spot from the reservation for a **new registrant**, scroll to the ‘Class List’ tab and click add registrant.

Fill out the necessary information and select the reservation you would like to use for the registrant from the drop down list.

Once you are finished, click ‘Create’ to add the registrant to the course.

2. To use a spot from the reservation for an **existing registrant**, scroll to the ‘Class list’ tab and click the pencil icon next to the registrant name.



Select the reservation you would like to use for the registrant from the drop down list.

Once you are finished, click ‘Save’ to update the registrant information.

The use of a reserved spot is completely manual. If no administrative user manages the reservation, the spot(s) will remain empty.

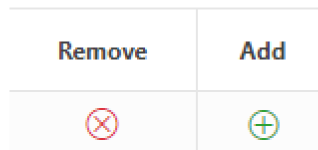
HOW TO MANAGE THE WAITLIST

1. From the home screen, search for the course for which you would like to manage the waitlist and click the pencil icon.

2. Scroll to the ‘Class list’ tab.

3. Click on the ‘Waitlisted’ tab.

4. Use either the red x to remove the employee from the waitlist, or the green + to move them from the waitlist to the list of registrants.
   Note: the system will automatically send a confirmation email once you move them to the list of registrants.

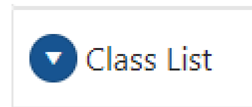


Through the Learning Central admin console, administrators are able to manually add registrants and exceed the maximum capacity of the course (if necessary).

HOW TO MANUALLY ENROLL A USER IN A COURSE

1. From the home screen, search for the course for which you would like to enroll a user and click the pencil icon.

2. Scroll to the 'Class list' tab.



3. Click on the 'Add registrant' button.

4. Enter either the first and last name and hit enter.
   Note: Be sure to double check the V# of your selected registrant if multiple options appear.

5. If applicable, enter the FAST code for the registrant.

6. If applicable, select the reservation to which the registrant belongs.

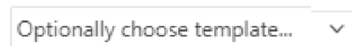
7. Once you have reviewed all of the registrant's details, click 'Create' to confirm the registration.
   Note: This will trigger an automatic registration confirmation email from the system to the registrant.

HOW TO EMAIL REGISTRANTS

1. From the page of the course for which you would like to email the registrants, scroll to the 'Class List' tab.

2. Click on 'email registered participants'.

3. *Optional:* From the drop-down list, choose the template you would like to use.



4. *Optional:* Click 'Load template'.

5. Review the template for any customizations that you may need to make. Any information displayed as [INFORMATION] is automatically generated by the system. Once you are finished, click 'Next'.

6. Review the final version of the email. If you need to back changes, select the '<' arrow. If you are ready to send the email, click 'Send'.

If you would like to request an email template, please contact Learning Central Admin.

HOW TO UPDATE COURSE INFORMATION

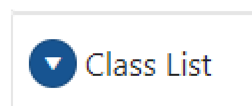
1. From the home screen, search for the course for which you would like to update the information and click on the pencil icon next to the course name.

2. Update the necessary information and click 'Save course'.

3. If you have changed the **date, time** or **location** of the course, remember to email registrants to inform them of the changes and suggest to update their calendar.
   NOTE: the system will NOT automatically send a notification of the changes. This must be done manually.

HOW TO PRINT THE CLASS LIST

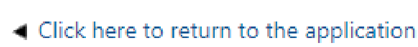
1. From the page of the course for which you would like to print the class list, scroll to the 'Class List' tab.



2. Click on 'Open sign in sheet'.

3. The system will automatically generate a class list of all registered participants, excluding waitlist registrants. To print this list, click on 'Click here to print this page'.

4. Once you have printed the list, click on 'Click here to return to the application' to return to the course screen.



4. CLOSE, CANCEL OR RESCHEDULE A COURSE

It is important to understand the distinction between the following three actions as well as the implications for each action in the system:

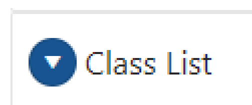
- **Close a Course:** Learning Central will generate an entry for all registrants' learning record
- **Cancel a Course:** No entry is generated for learning records, but a historical record of the course exists within Learning Central
- **Reschedule a Course:** Course remains open for registration and editing

Tutorials in this section (click each title to jump to the selected tutorial):

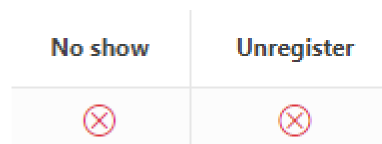
Close a Course | **Cancel a Course** | **Reschedule a Course**

HOW TO CLOSE A COURSE

1. From the page of the course which you would like to close, scroll to the 'Class List' tab.



2. Review the list of registrants for any no-shows or cancellations. Use the correct red X to update their status.



- **No Show:** For registrants who do not attend on the day(s) of the session. This status will remove their registration from the course, remove the course from their learning record and add the No Show tag to their record.
  If you do not have their signature on your sign-in sheet, best practice is to send them an email confirming their non-attendance.

- **Unregister:** For registrants who provide cancellation notice within your specified

window. This status will remove their registration from the course and remove the course from their learning record.	
3. Selecting either ‘No show’ or ‘Unregister’ will open a dialogue box where you can confirm the new registration status, as well as indicate if you have charged the registrant any fees (if applicable)	
4. Once you have reviewed all the registrants, scroll up to the Course Details section and click the ‘Close course’ button.	
5. A confirmation window will open. If you are sure that you would like to close the course, click ‘ Ok’ *NOTE: this action CANNOT be undone.*	

HOW TO CANCEL A COURSE

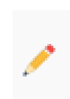
1. From the page of the course which you would like to cancel, click the 'Cancel' button under Course Details.

2. The system will automatically generate a cancellation email for all participants. Review the template for any customizations that you may need to make. Any information displayed as [INFORMATION] is automatically generated by the system. Once you are finished, click 'Next'.

3. Review the final version of the email. If you need to back changes, select the '<' arrow. If you are ready to send the email, click 'Send'.

HOW TO RESCHEDULE A COURSE

1. From the home screen, search for the course which you would like to reschedule and click on the pencil icon next to the course name.



2. Update the necessary information and click 'Save course'.

3. Remember to email registrants to inform them of the changes to the date, time or location.
   NOTE: the system will NOT automatically send a notification of the changes. This must be done manually.

5. RUN REPORTS

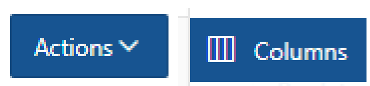
HOW TO RUN A REPORT

1. Click on 'Reports' from the left side bar.

2. The system will automatically display a report of Course Participants.

   To see a report of users who have indicated their interest in a course, click on 'Course Interest'.

3. *Optional:* To select the information you would like to include in your report, click on 'Actions' then click on 'Columns'.

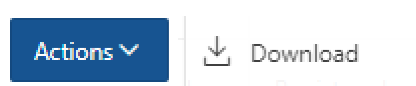


   Select the information you would like to include/not include and use the arrows to add or remove them from the list of items displaying in your report. Once you are finished, click 'Apply'.

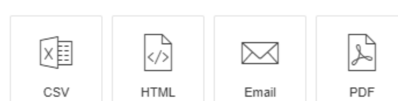
4. *Recommended:* To filter the date range for which your report date is full, click on 'Actions' then click on 'Filter'

   Set the Column to 'Start date' and the Operator to 'between', then enter the date range for which you would like your report and click 'Apply'.

5. To download your report, click on 'Actions' and select 'Download'.

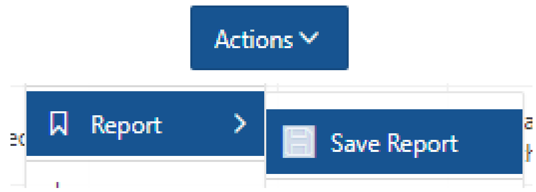


   Select the format for your report and wait for it to download. This may take a while.



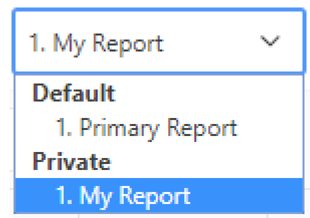
Once your report has downloaded, click the ‘X’ to exit out of the window.

6. *Optional:* If you have a preferred report view, or specific columns you will always include/not include, you can save the report by clicking on ‘Actions’, then ‘Reports’ then ‘Save Report’.

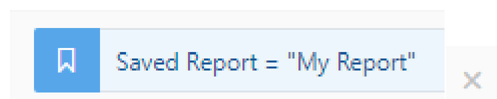


Enter in the name of your report, a description and click ‘ Apply’.

To toggle between specific reports, select your preferred report from the dropdown menu.



To delete a saved report, make sure you have that report open. Next, click on the ‘X’ next to the report name.



RESOURCES

LEARNING CENTRAL WEBSITE

Website: https://www.uvic.ca/hr/learning-development/learning_central/index.php

EMPLOYEE LEARNING CALENDAR WEBSITE

Website: https://www.uvic.ca/hr/learning-development/calendar/index.php

LEARNING CENTRAL ADMIN TEAM

Email: odls1@uvic.ca

APPENDICES

INTRODUCING YOUR TEAM TO LEARNING CENTRAL

Using this platform for the first time represents a change in the regular operation. Make sure your process aligns with the way Learning Central works.

A suggested approach includes:

1. Have a discussion with your team regarding your Learning Central needs, potential questions could be:
    - What specific courses or workshops would we like to run through Learning Central?
    - What level of access does each team member need? Select between Read-only or full administrator.
    - What account could be used as group email? *This email is used to send all automatic notifications on behalf of the group. Registrants can reply to it.
    - What is the service policy regarding late cancellations, no-shows, etc? Define whether fees will be applied.
2. Attend a Learning Central training session OR schedule a consultation with one of the Learning Central Admin Team members
3. After attending training, have a discussion with your team regarding specific roles and responsibilities on Learning Central making sure each step in the admin cycle has a person assigned:
    - Who is responsible for adding new instructors and courses?
    - Who is responsible for monitoring registration and waiting lists?
    - Who is responsible for marking registrants as attended, no-shows or cancelled and making any necessary charges to FAST accounts?
    - Who is responsible for closing courses? *All courses, after being offered, need to be closed in order for the system to create the learning records for participants.
4. Schedule a check-in for 2-4 months after starting using Learning Central to see how the application is working for you. Be sure to send any feedback, requests, and/or technical issues to the Learning Central Admin team.