Manager Guide

COMMONWEALTH

Governmental Services Center (GSC) serves as the centralized resource for the education, training and development of state employees and agencies. Our instructor led classes, online courses, certificate programs, consultation services and other statewide programs are provided to support the agencies we serve in their mission to grow and develop employees of all types. We offer a variety of training and development programs to assist state employees of all levels with leadership skills, individual performance, skill building, and career development. Many of the courses offered are designed not only to help employees meet minimum qualifications for advancement, but also to build the skills, competencies, and sensibilities necessary to grow, learn, lead, and serve the Commonwealth in a variety of different influential and leadership roles.

GSC is located at the Kentucky State Office Building, 501 High Street, 2nd Floor, and Frankfort, KY 40601. For more information, contact the: Governmental Services Center at persgsc@ky.gov.

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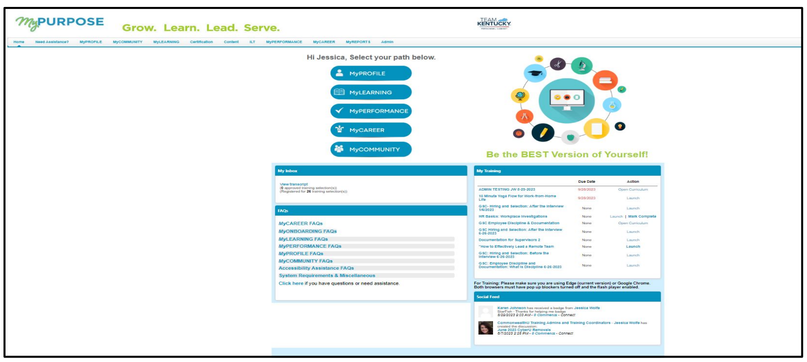
Account Settings

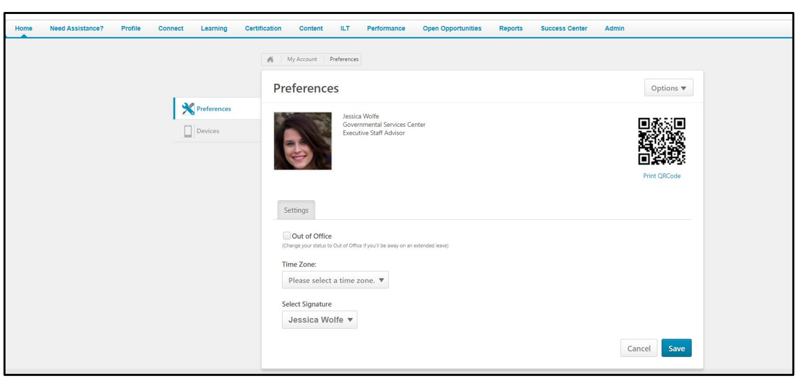
Locating Personal Preferences and Setting Out of Office

Learners and Managers can edit their personal preferences and set their "Out of Office" in MyPURPOSE. Select this option to indicate that you are out of the office or absent for an extended leave. If the "Out of Office" option is enabled and the user is a manager/approver with training requests to approve, the request will route to the next person in the approval chain (if required).

1. To set the "Out of Office" setting from the homepage select "Settings Icon." From the drop-down menu select "My Account."



2. On the Preferences screen you will be able to update information, including your Time Zone, E-signature font and the "Out of Office" status. To enable the out of office feature, add a check mark in the indicator box. Select "save."

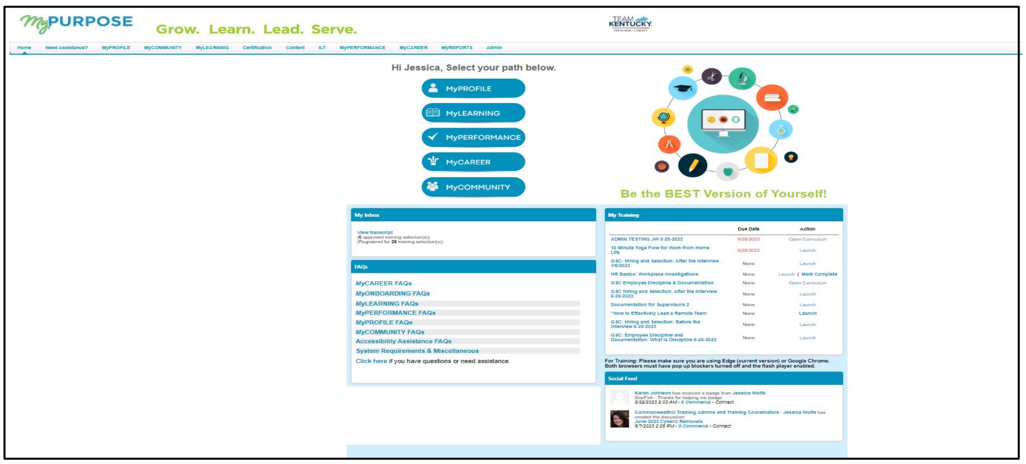


The out of office feature is now enabled. If the user is a manager and this option is enabled, all requests from their employees will go to the next line supervisor, including pending requests. Managers that will be out on an extended leave, must enable this option within the system.

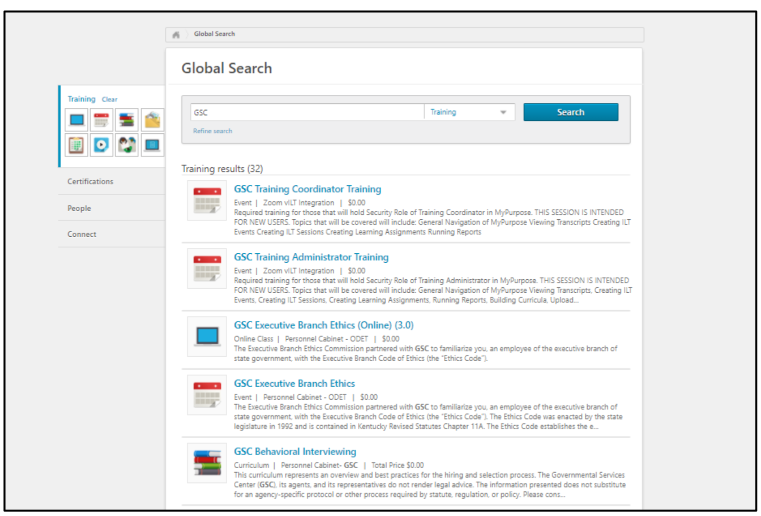
General Navigation

Using the Global Search

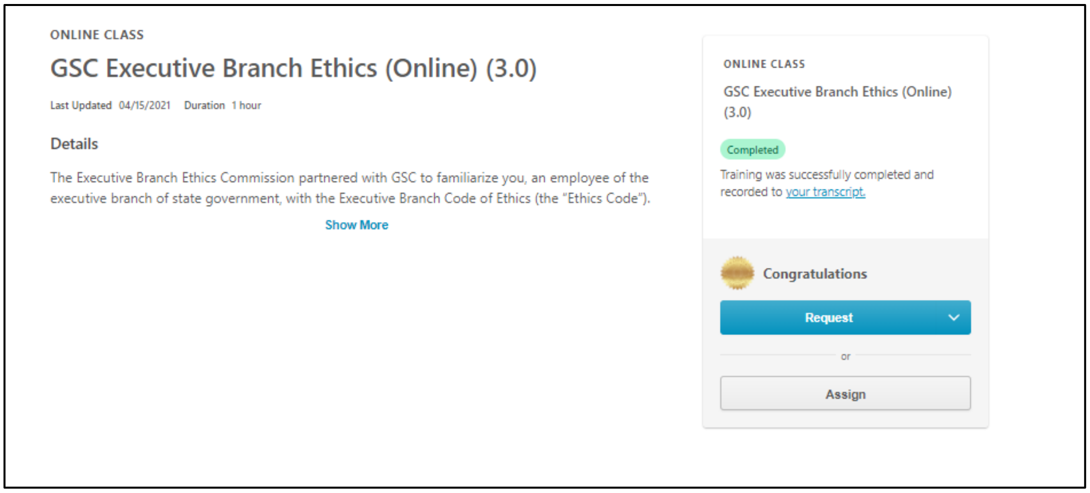
1. To search for a Learning Object, **select the Global Search Box**.



2. Type in the name of the training. This will pull back any matches.



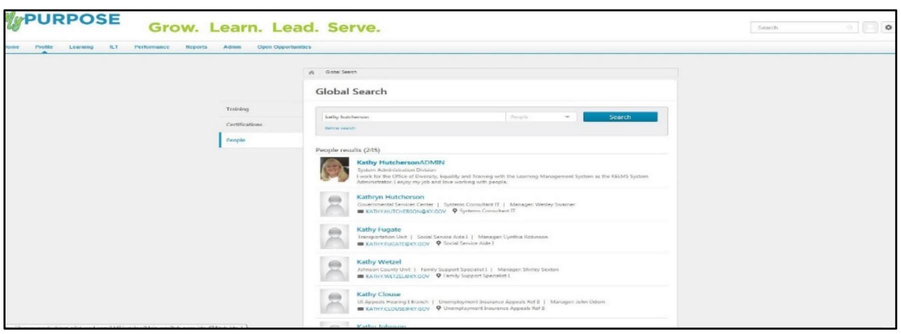
3. **By selecting the course tile**, users will be able to request the training from the Course console.



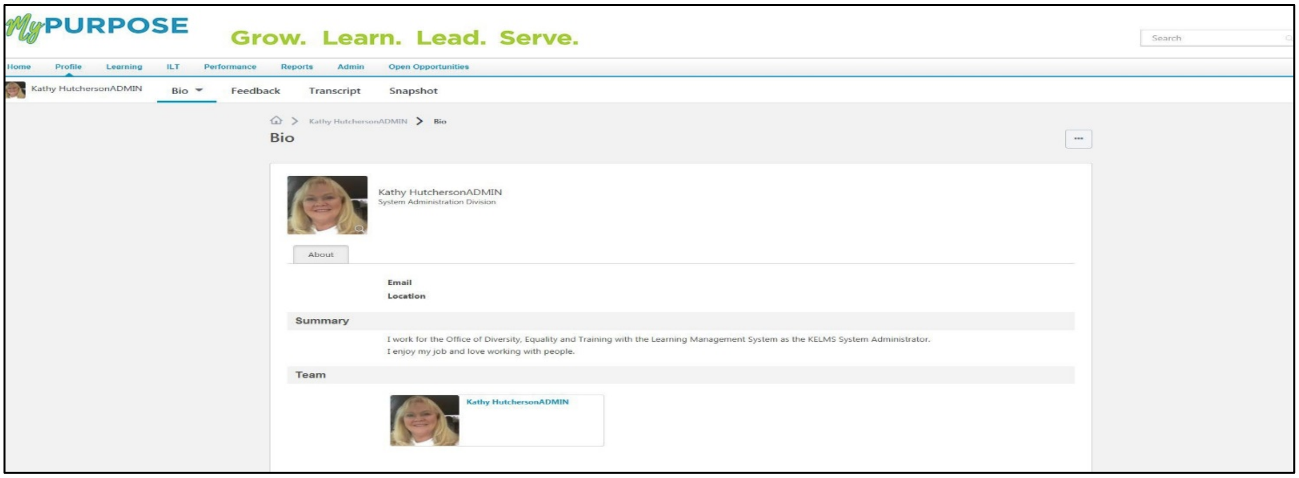
Locating Transcript for Direct Reports

Locate the **Global Search in the upper right corner of the screen**. Enter the name or user id that you would like to find.

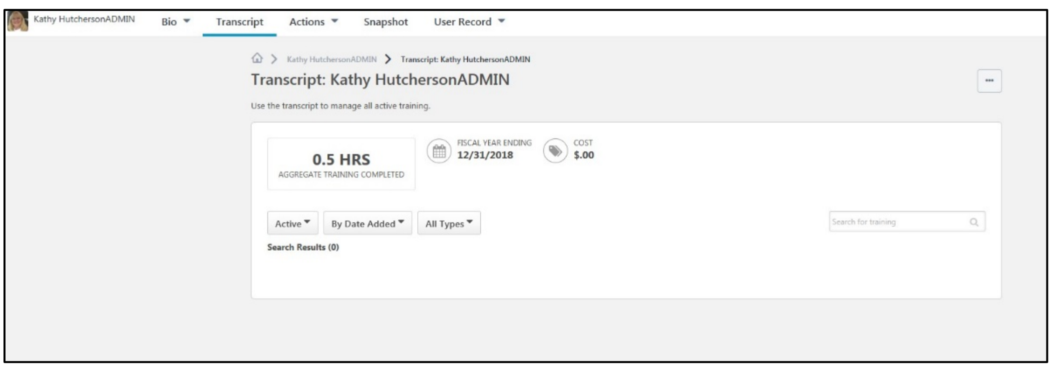
1. Global Search will return matching results under the **People tab**. **Select the user's name**.



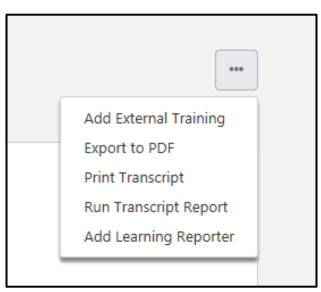
2. To review the User Record, **select the Username hyperlink**. Once selected, this will pull up the Universal Profile. The Universal Profile screen will show the general information from the account.



3. To view the user’s transcript, **select Transcript** at the top of the page.
4. The Transcript page will show all completed and registered trainings. Trainings that have been completed will show at the top of the screen with total hours.



5. Training Transcripts can be exported to PDF by **selecting the ellipsis “…” tab**.



From the drop-down menu the options below will appear:

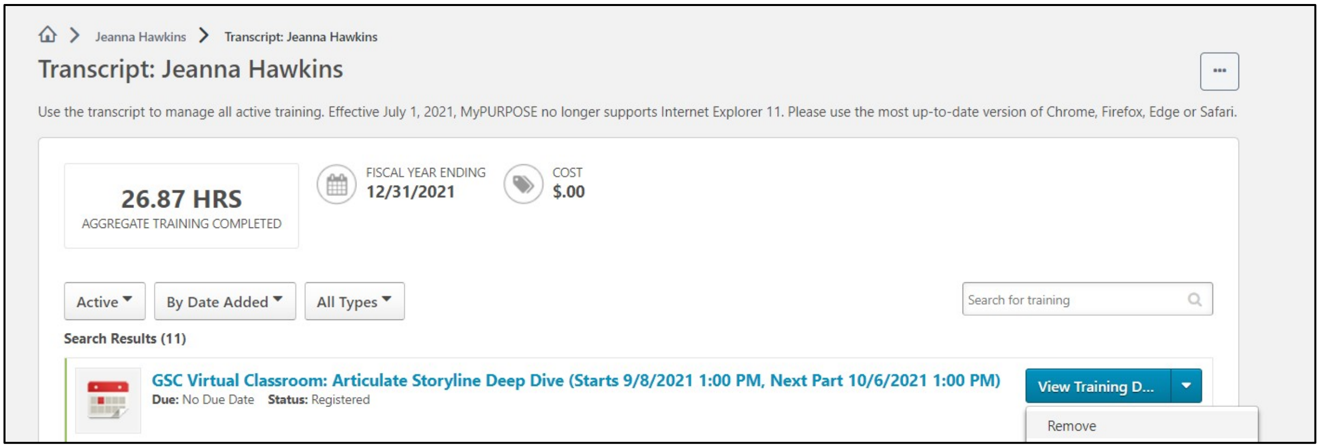
- **Add External Training-** This option will allow you as a Training Coordinator to add a self-reported training to another user's transcript.
- **Export to PDF-** This option will allow the transcript to be reported to a PDF file. Each page of PDF must be printed individually. ONLY EVENTS will show on the PDF.
- **Print Transcript-** This option will print the training transcript.
- **Run Transcript Report-** This option will allow Coordinators and Admins to run a report exported out into EXCEL. This choice will pull up a report page, you must enter in the criteria that is desired. You must leave sessions off the report to get a correct amount of training hours.

6. To Exit the user profile, **select MyPURPOSE at the top of the screen**.

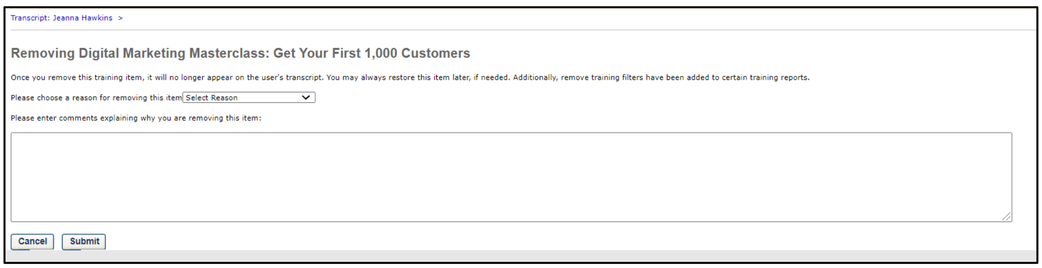
Removing Training from Direct Reports Transcript

Many times, users may have training that no longer applies on their transcript. Managers can remove training that they have assigned to their direct reports, managers will only be able to remove training that they have assigned. To remove a training:

1. On the training transcript users will have the ability to select from the active trainings. Using the drop-down menu, select the remove option.



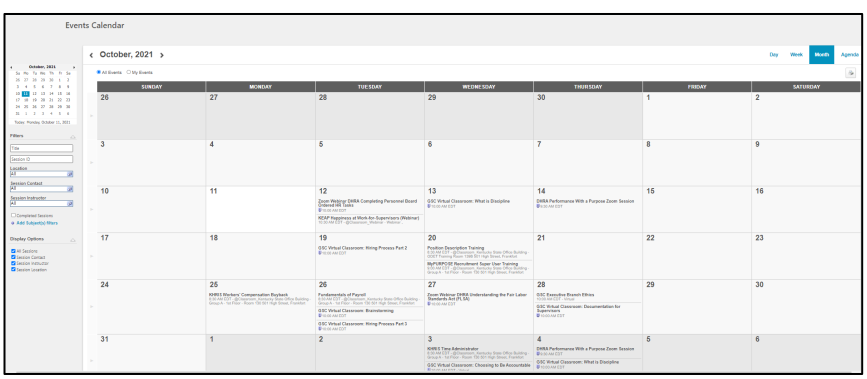
2. Once the remove option has been selected, users will be prompted to provide a reason and comment for the removal.



Using the Learner Event Calendar

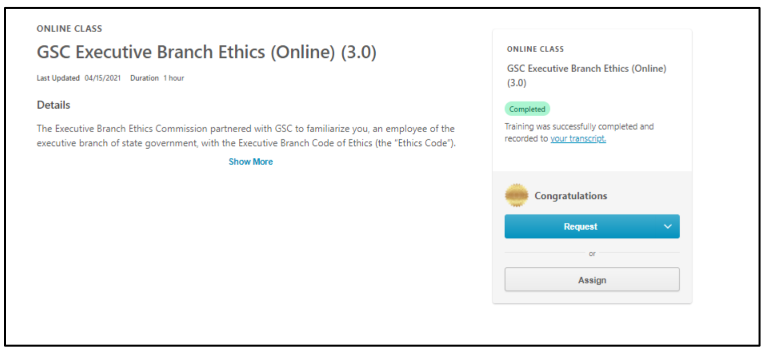
Learners can view upcoming training. Using the Event Calendar will allow a quick glance at upcoming dates.

1. To access the Event Calendar hover over Learning, **select Event Calendar.** A calendar view will show all upcoming training dates. Users will be able to select from the date or can switch over to an agenda view.



Requesting Training

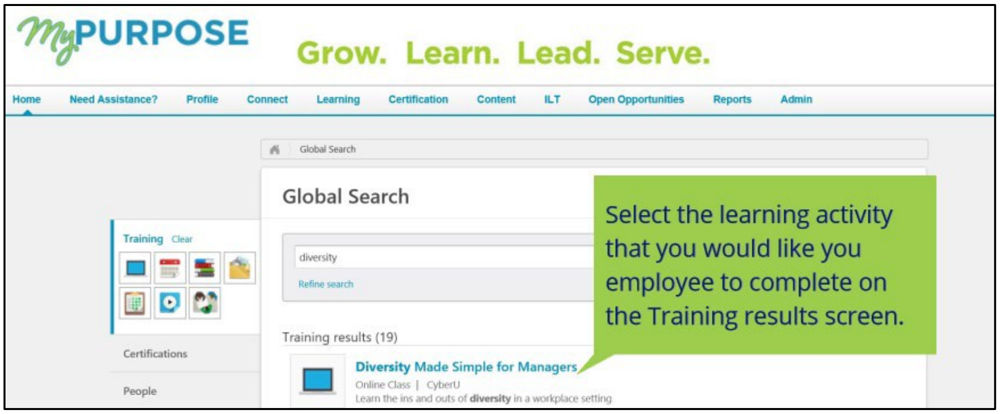
MyPURPOSE is designed to allow users to enroll themselves for a variety of different learning objects. When a learner requests a session or course, an email notification is then sent to the manager requesting approval to attend/complete the training. Managers also can assign training to their direct reports. In the picture below you will notice that there is both a request and assign option. The assign option here will not assign the training to users. By selecting assign you are looking at those users that directly report to you. This is how managers would assign training to their employees.



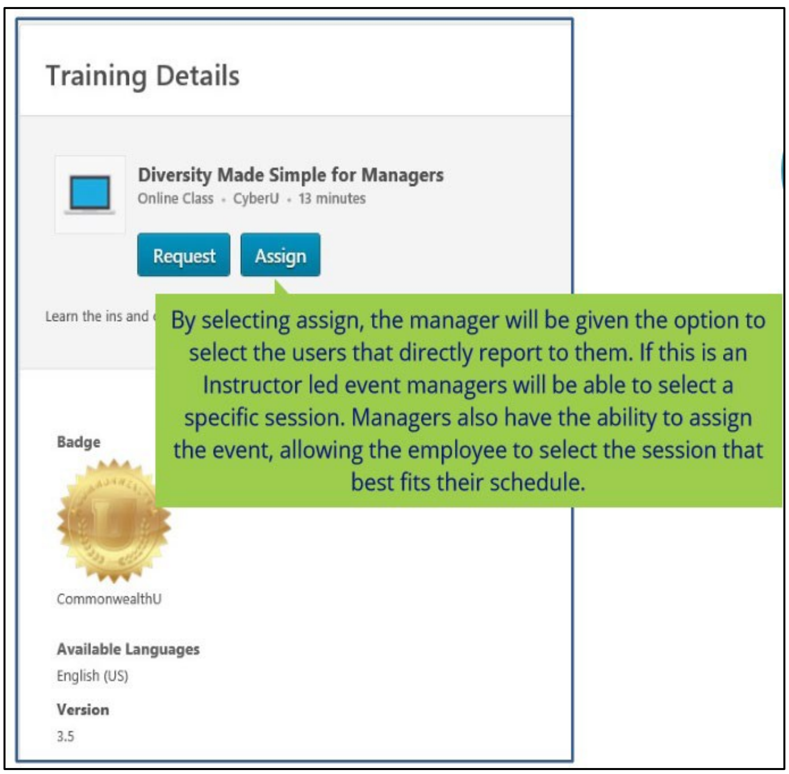
Assigning Training to Direct Reports

As a manager, you may want to assign a learning activity to an employee. CommonwealthU makes it easy.

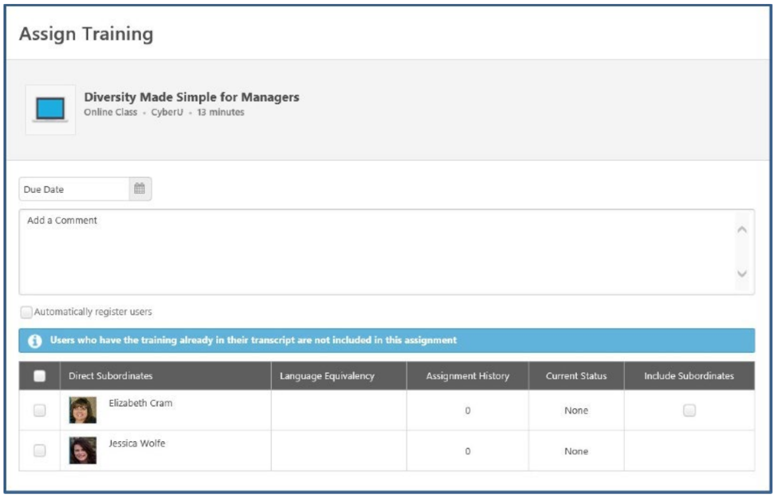
1. To begin, search for an activity through the global search or learner home page. Type in the name of the activity or a key word in the search bar.



2. Training Details- here managers will be able to either request to attend the training themselves, or have their employees attend the training. This will only assign the training to those users that directly report to you.



3. Managers will be able to see their direct reports on the Assign Training screen.

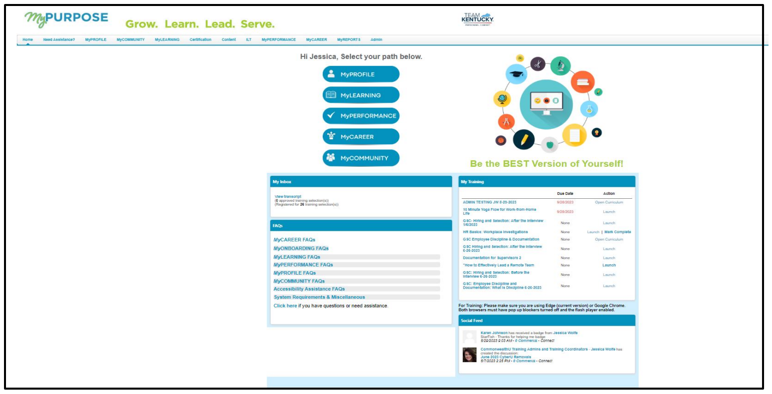


If the training is a part of this year's performance plan for the employee. You could select the end of the year as the due date. The comments section will allow you to enter a note that the employee will see with the assignment. It is recommended that you have a conversation with the employee prior to assigning the training. Assigning the training would serve as a follow up to that conversation. Next, select the subordinates that you wish to attend the training, you can select indirect subordinates if you wish. Select submit when you are finished this assignment is now complete. When your employee launches CommonwealthU, the event will show up in their due soon section.

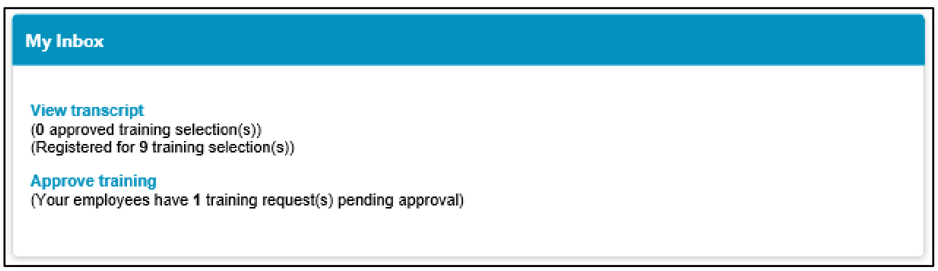
Approving Training

To approve training request for employees, managers must log into MyPURPOSE. There are two locations that training can be approved.

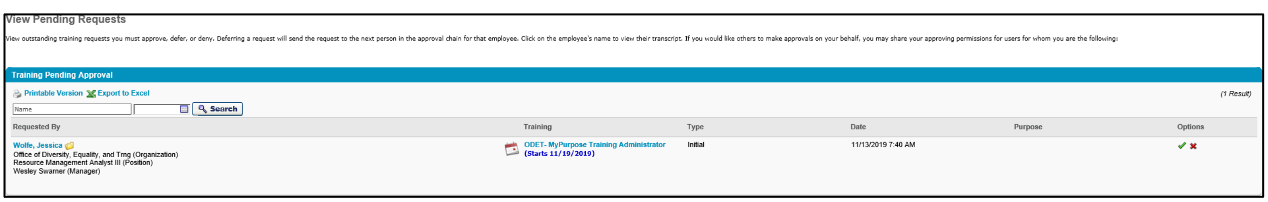
1. On the MyPURPOSE homepage, users will find the inbox widget. To find this widget, scroll down on the MyPURPOSE homepage.



This widget will show any pending approvals that your employees have requested. By selecting Approve Training, managers will have the opportunity to approve or deny the training request.



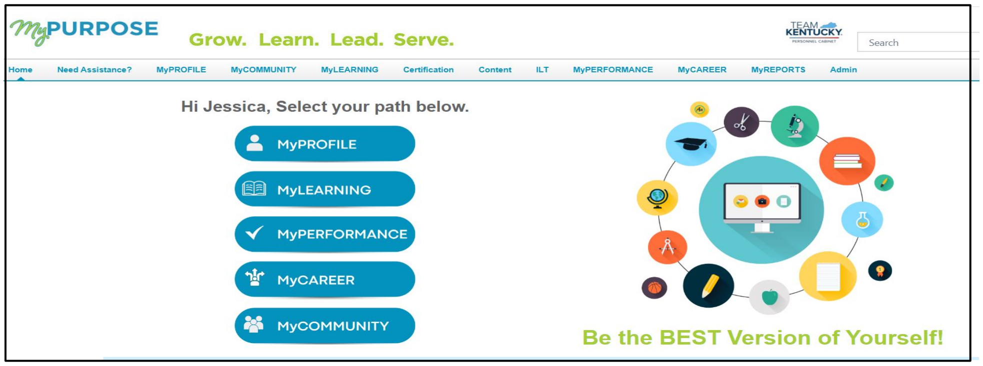
2. Once the manager selects the Approve Training option, the screen will refresh to the View Pending Request page. Here, managers will have the ability to view the request that was submitted and select if the training will be approved or denied. Once the option has been selected, the system will prompt the manager to add any other comments.



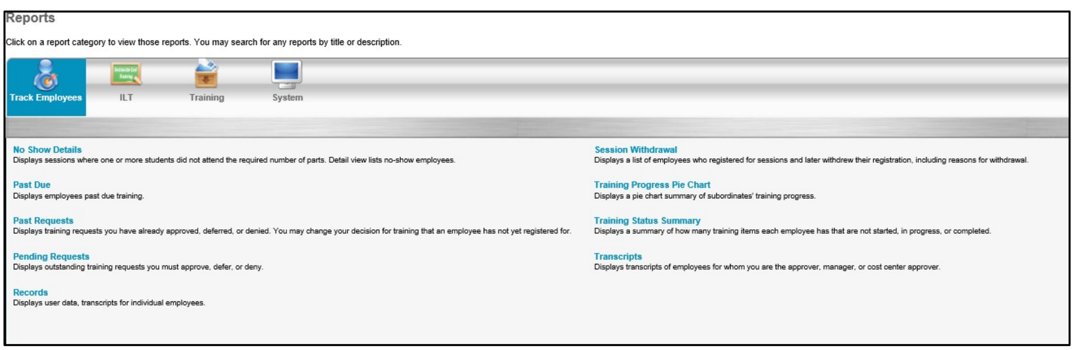
PLEASE NOTE: The Inbox Widget will only display the most recent requests. If a training request does not appear in the Inbox, please review the second location for approving training request.

Using Reports to Approve Training Request

1. From the MyPURPOSE homepage, managers will need to select the tab titled Reports.



2. From the Reports drop down, the manager will need to select the option Standard Reports.
3. From the Standard Reports screen, managers will have the Track Employees tab. This tab has several reports available for managers. To approve Training requests, managers will need to select Pending Requests.



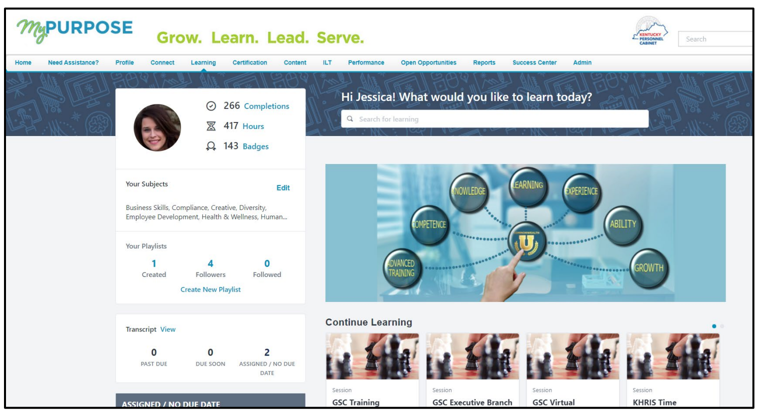
4. The screen will refresh to the View Pending Request page. Here managers will have the ability to view the request that was submitted and select if the training will be approved or denied. Once the option has been selected the system may prompt the manager to add any other comments.

Learner Home

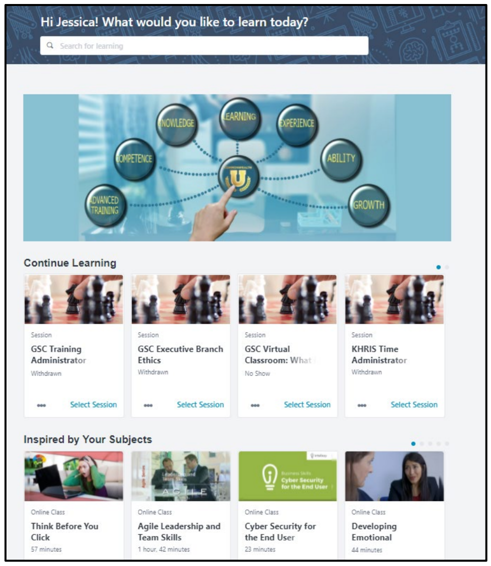
Using the Learner Home Screen

The Learner Home screen consists of several distinct parts that will allow users to view their profile and search for training all in one place. The Learner Home Page consist of:

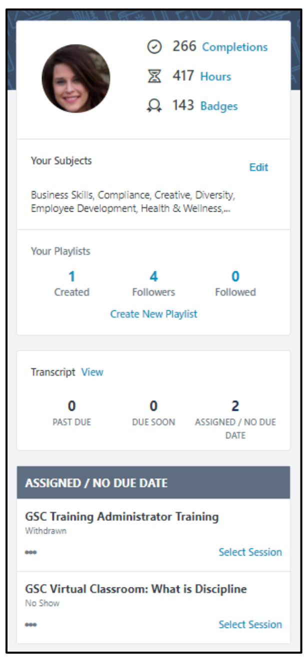
- User Profile: The User Profile on the top left of the page lets the learner quickly see their all-time learning completions, badges, and hours. In one click they can access their Transcript, Universal Profile, and Selected Subjects, which help power their recommendations.



- Carousels: Learners have different learning carousels to browse on the page. These learnings are based off the learner's history, saved learning, admin-defined, interested subjects, and recommendations.



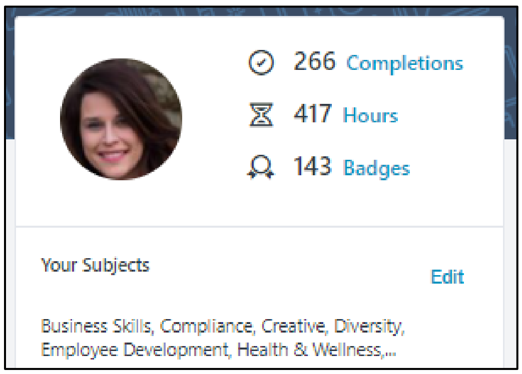
- Learners do not have a need to leave the page to access their Transcript. With the Side Bar on the left side of the page containing learning they must act on. It is conveniently broken down by learning that is Past Due, Due Soon, and Assigned with No Due Dates.



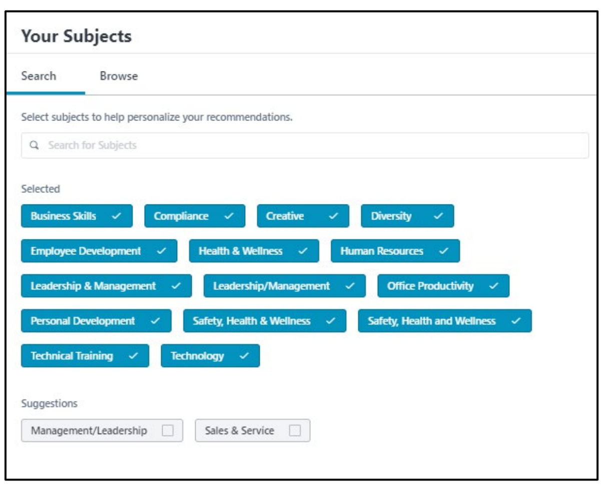
Setting Your Subjects

Learners will see a carousel based on Subjects. For this carousel to appear, learners must first select Subjects. To set your Subjects in MyPURPOSE:

1. Access the Learner Home Page, hover over the Learning tab and from the drop-down select Learner Home.
2. From the Learner Home page locate the side bar, users will find their profile along with an option to Add Subjects. Select Add.



3. Once selected the system will generate a pop out box that will allow users to search recommended subjects or browse all subjects.

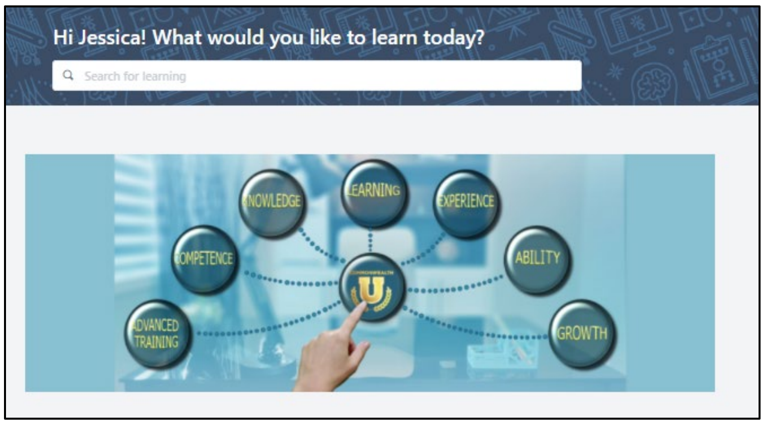


4. To add the desired subject, users will need to select the checkmark box. Once all subjects have been added select "Save" in the bottom right corner.

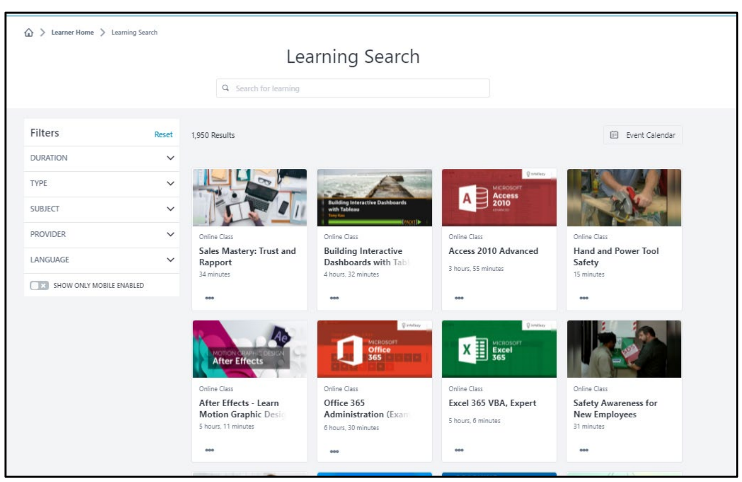
Searching for Courses Using Learner Home

Aside from using the learning carousels, the Learner Home page features a search box. This search box will allow users to see more training options than what is displayed in the carousel. To use the search box:

1. On the Learner Home Page access, the search box. Type in the name of the course, subject, provider, or keyword.



2. For this example, we will use the CyberU as the provider. A full listing of CyberU courses will return. If searching doesn't do the trick, learners can use filter options including Duration, Type, Subject, Rating, Provider, Language, and Mobile Enabled to easily find exactly what you're looking for.



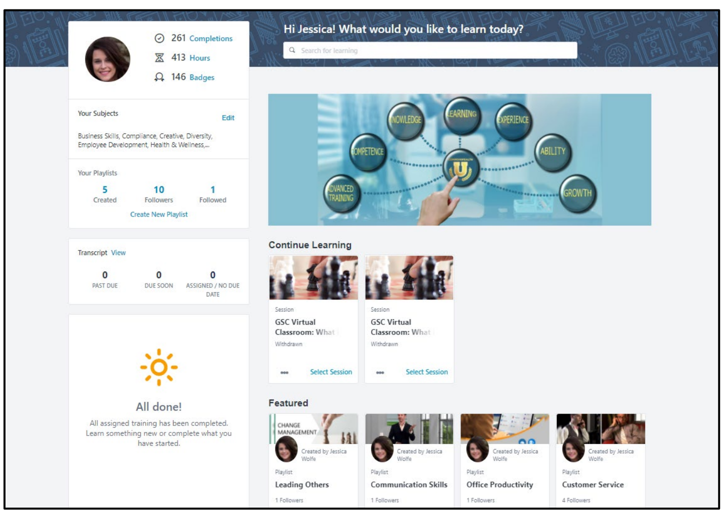
3. If you find a learning you want to take but do not want to request it

yet, they can use the Save for Later option using the three dots at the bottom of each tile. Learners can quickly access the Event Calendar to find sessions using the Event Calendar button.

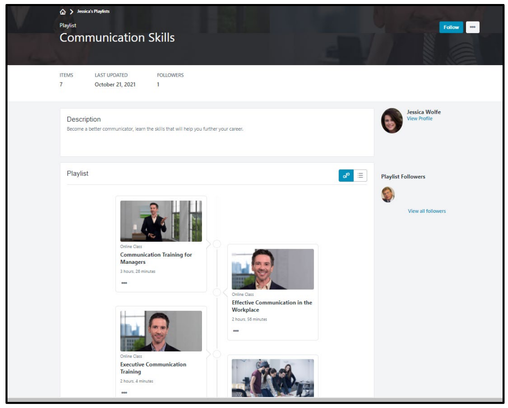
4. If you find the course that you want to take, select the title of the course. This will take you to the registration page. Here users will be able to request the course or if you are a manager you will be able to assign the course to your direct reports.

Playlist

Playlists are collections of learning content curated by the Personnel Cabinet. Playlists can be found on the Learner Home Screen. Playlist will help guide employees and managers with training opportunities. To find a playlist you will need to navigate to the learner home screen.



Playlists that have been created by the Personnel Cabinet will be marked as a featured item. By selecting the title of the playlist, you wish to open, you will see what courses have been curated for the topic.

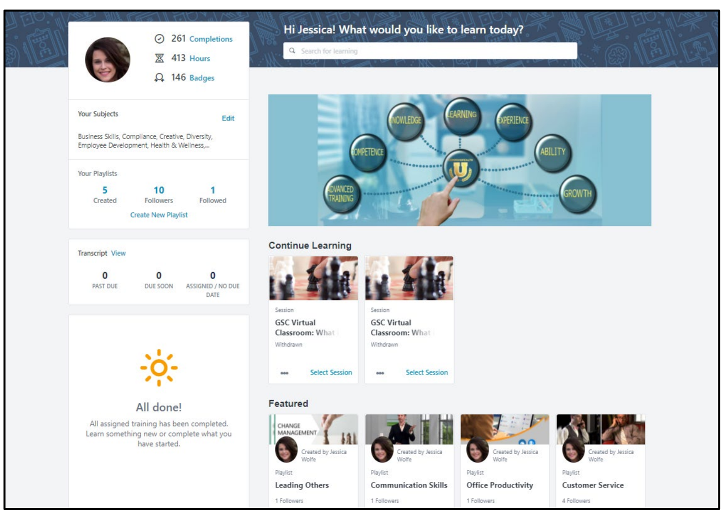


Don’t forget to hit the follow button, this will allow you to see the latest updates to the playlist.

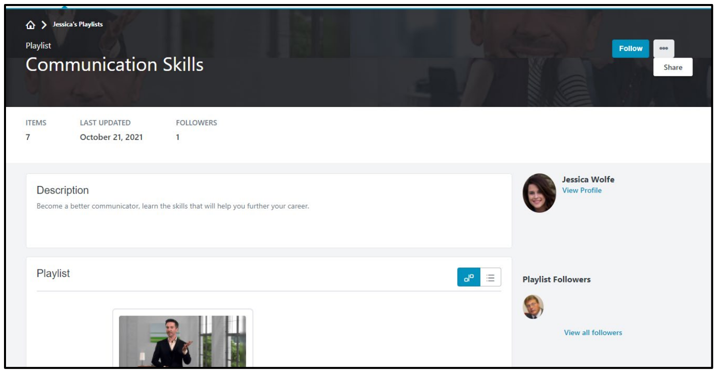
Sharing Playlists

If you find a playlist that you find beneficial and want to share with your team, this can be done in an easy step.

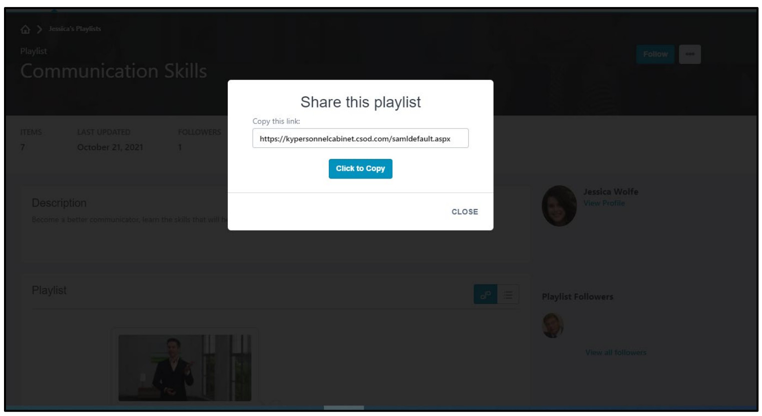
1. First you will need to access the playlist from the Learner Home screen.



2. Once located you will need to select the playlist title. Once you have opened the playlist you will find an ellipsis option in the top right. Select the Share option.



3. Once you have selected the share option, you will have the ability to copy the link to the playlist. This can then be shared in an email with co-workers or direct reports.

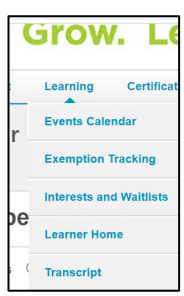


Transcripts

Accessing your Learner Transcript

All users in MyPURPOSE can view and maintain their own learning transcript. To access the learner transcript:

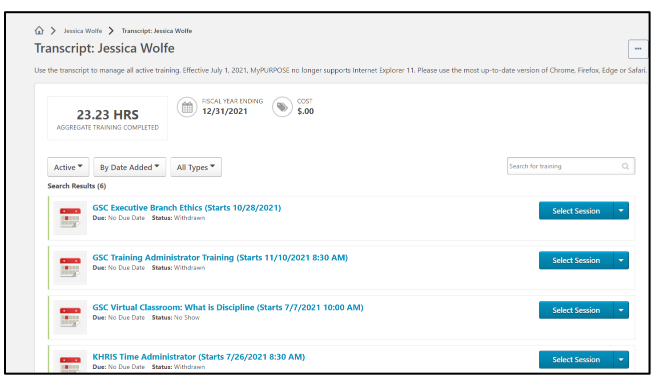
1. From the MyPURPOSE homepage hover over the learning tab. Select the transcript option.



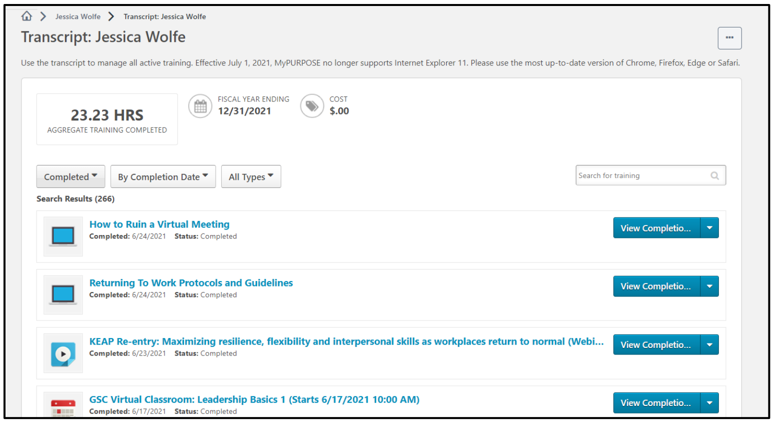
2. Once on the transcript users will see the “Active” transcript, this is where users will find all training in which they are currently enrolled. Users will also be able to see how many training hours have been completed within the calendar year.

   Users will be able to view their status for each course that they are actively registered for:

   - **In Progress**- typically present for online courses or curricula. This means that the training has been started but has not been completed.
   - **Registered-** typically present for online courses and instructor led training. If the status is showing as registered this means that the course is actively registered.
   - **Withdrawn-** users that need to cancel themselves from an actively enrolled course will have a withdrawn status.
   - **Waitlisted-** typically present for instructor led sessions. This means that you have been waitlisted for the course. If a seat opens, you will be notified by MyPURPOSE.



3. Users can change the filter from “Active” to “Completed.” This will give users a full record of their training. Training in MyPURPOSE will date back to 7/1/2015 to the current period.

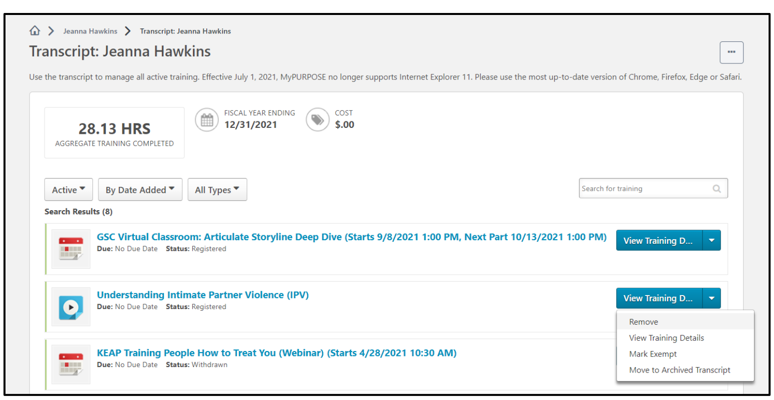


If the user has completed an online course, these can be relaunched at any time to review the materials. To relaunch the course, use the drop-down arrow next to the course title. Here users will see a launch option.

Removing Training from Transcript

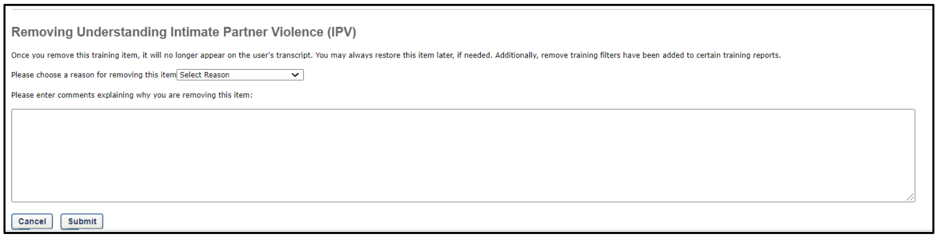
Many times, users may have training that no longer applies on their transcript. Users can remove the training from the transcript. This will only remove training that has been self-registered, this will not remove training that was assigned you by your manager or training coordinator or administrator. To remove a training:

1. On the training transcript users will have the ability to select from the active trainings. Using the drop-down menu, select the remove option.



2. Once the remove option has been selected, users will be prompted to

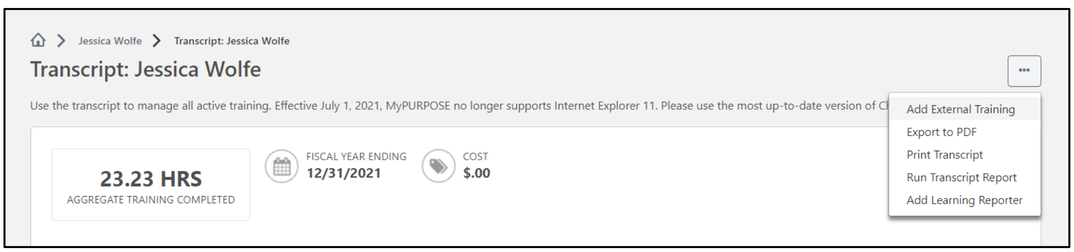
provide a reason and comment for the removal.



Adding External Training to Transcript

External training should only be used for users that attended a training from an outside agency. Trainings that are conducted by GSC should not be entered in as External Training. Employees can record their own External Training. Managers must approve the training before it is completed on the transcript. To Record an External Training

1. **Select the "ellipsis" tab**.

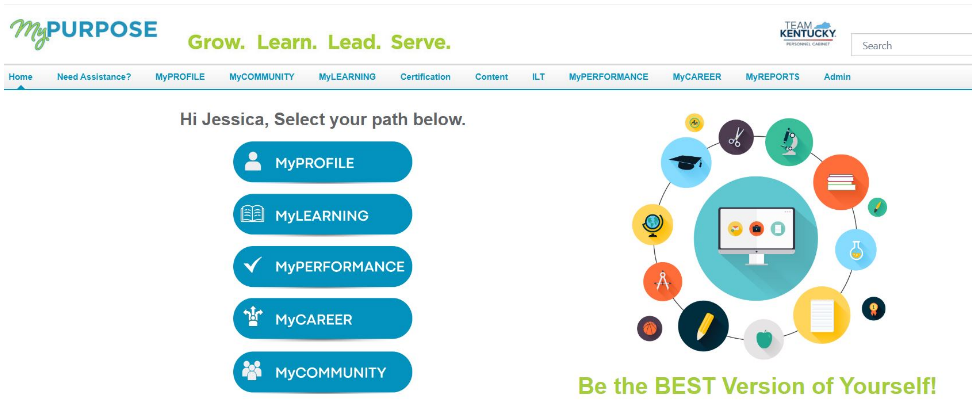


- **Add External Training-** Self-Reported training requires manager approval. Once approved the user must go back to their transcript page and mark the training as completed.
- Users can print their transcript directly from MyPURPOSE or to download PDF copy.

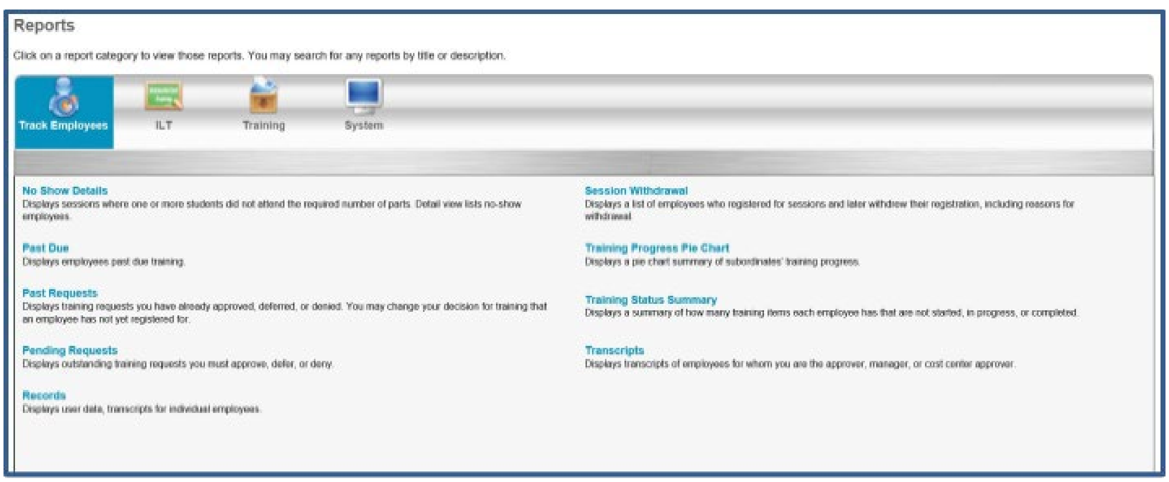
Manager Reports

Standard Reports allows managers to gather general information regarding training data. The Standard Reporting Tool will allow you to create, run and schedule reports to view agency progress. To use a Standard Report, it is important to know how to use filters and parameters to retrieve the needed information.

1. MyPURPOSE home page, Managers will have a tab titled Reports. From the drop-down menu managers can select standard reports to retrieve more information regarding their employees training records.

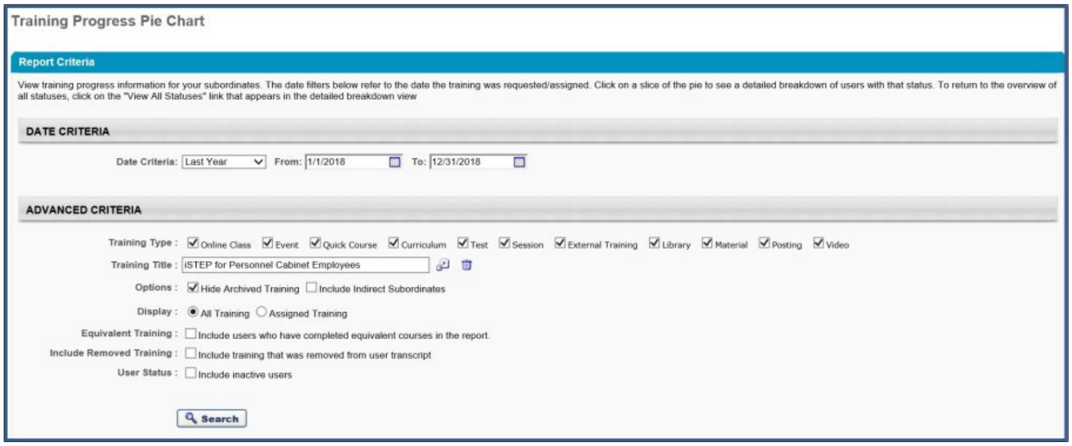


2. Select Reports- Then select Standard Reports. Make sure you are on the Track Employees screen. There are a variety of reports available to you as a manager.



Manager Reports- Training Progress Pie Chart

1. As a manager there may be times you need to check all employees' status regarding a specific course. You can do that using the Training Progress Pie Chart.

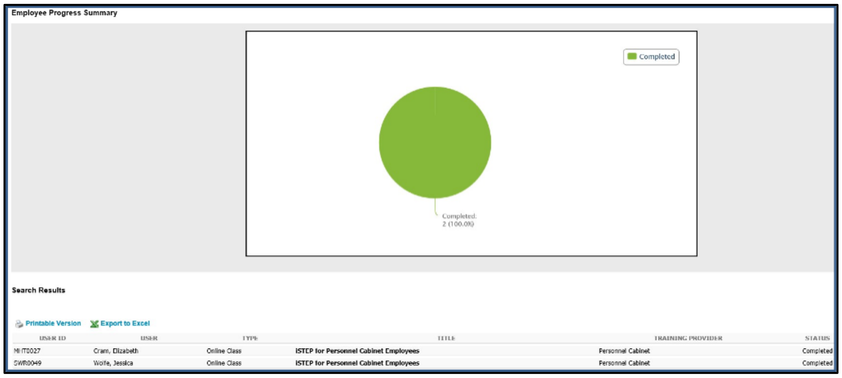


The advanced criteria will allow managers to further determine what information pulls back in the report. The following options will need to be configured:

- **Training Type**: this will pull back any learning object in the system that includes the training title.
- **Training Title**: Managers will be able to select an individual training title to report on. This will allow managers to report on their employee's completion of a specific training.
- **Display:** By selecting all training option this will include any user that directly reports to the manager, with the training on the transcript.
- **Equivalent Training**: By selecting this choice managers will also see any training that is the equivalent.
- **Include Removed Training:** This will show any user that has removed the training from the transcript.
- **User Status:** By selecting the user status managers will be able to report on users that are active or inactive in the system.

2. Once the report has processed managers will receive information regarding their direct reports. This data can also be exported to an

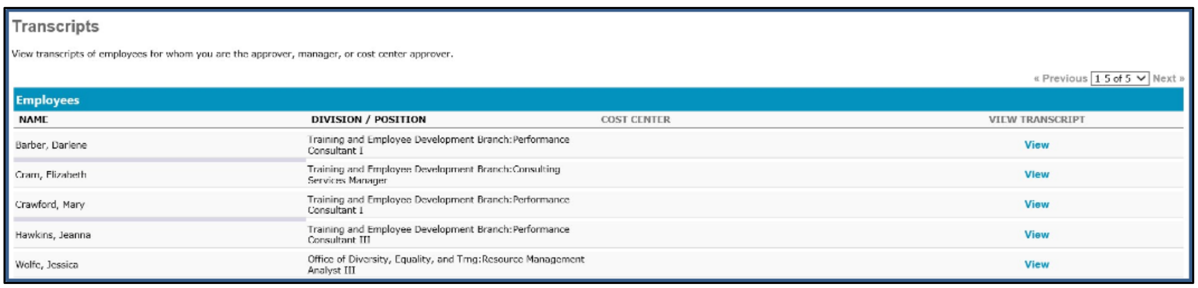
excel spreadsheet



USER ID	USER	TYPE	TITLE	TRAINING PROVIDER	STATUS
MHT0027	Cram, Elizabeth	Online Class	ISTEP for Personnel Cabinet Employees	Personnel Cabinet	Completed
SWR0049	Wolfe, Jessica	Online Class	ISTEP for Personnel Cabinet Employees	Personnel Cabinet	Completed

Manager Reports- Transcript Report

As a manager you will have the responsibility to view your employees training transcripts. The Transcript Report will allow managers the ability to review each of their employees training.



NAME	DIVISION / POSITION	COST CENTER	VIEW TRANSCRIPT
Barber, Darlene	Training and Employee Development Branch:Performance Consultant I		View
Cram, Elizabeth	Training and Employee Development Branch:Consulting Services Manager		View
Crawford, Mary	Training and Employee Development Branch:Performance Consultant I		View
Hawkins, Jeanna	Training and Employee Development Branch:Performance Consultant III		View
Wolfe, Jessica	Office of Diversity, Equality, and Trng:Resource Management Analyst III		View