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EMPLOYEE SERVICES

Percipio ILT Administrator's Guide

Skillsoft Percipio is a learning management system (LMS) the university uses to provide online training and instructor-led training (ILT) classes to faculty, staff, and students.

The following user roles apply to Percipio:

- **Learners** – End users who log in to Percipio through their campus portal to complete online courses and enroll in ILT classes. Refer to the *Skillsoft Percipio Learner's Guide* for more information.
- **Instructors** – Facilitators of ILT classes who print rosters, email learners, enter grades, and complete classes.
- **ILT Administrators –** People who manage ILT classes by creating classes, managing classes, and completing classes.
- **Report Administrators** – People who only need access to run reports in Percipio. Report administrators should refer to the *Percipio Administrator's Reporting Guide* for more details and procedures.

This guide describes tasks for Percipio ILT administrators, some of which may also apply to instructors, such as printing a roster, enrolling a user, and entering results (grades). For other users, refer to the guide specific to your role listed above.

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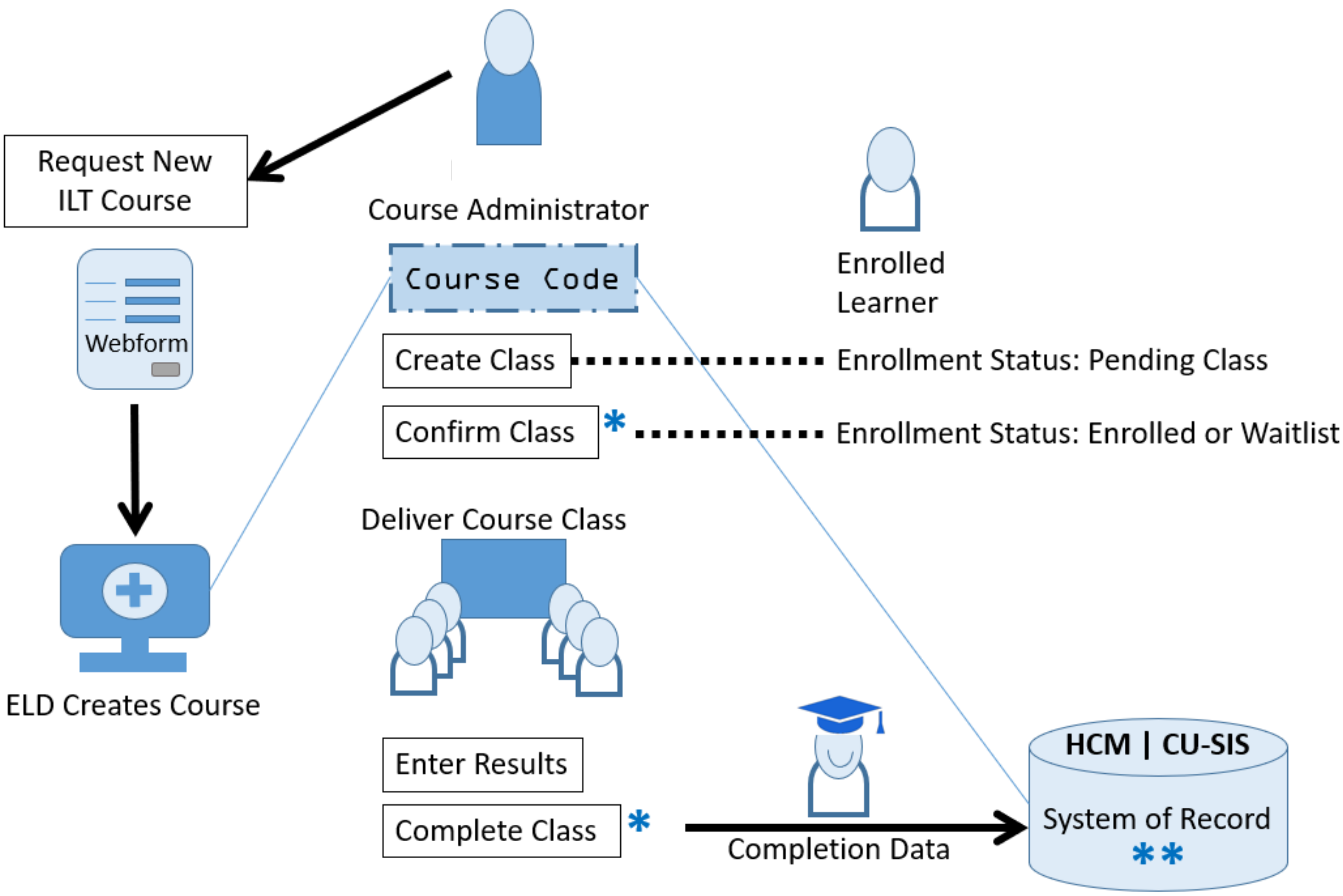
Managing ILT Courses and Classes

As a Percipio administrator, you can manage instructor-led training (ILT) classes, also referred to as live learning. This includes scheduling training classes, setting up self-enrollment, managing class rosters, and tracking training completions. After the class has been delivered, you must mark the class complete within 29 days of the class delivery date. Failure to mark classes complete requires a manual upload of completions. Email system.training@cu.edu for support.

Once a class is marked complete, the employee training record in the PeopleSoft Human Capital Management (HCM) system is updated automatically overnight. If ILTs are required for students, their completions are updated in CU Student Integrated Systems (CU-SIS) automatically overnight.

Purpose of Managing ILT Classes

The overall goal of managing ILT classes is to track enrollment and record a learner's completion of a class correctly. The diagram below illustrates the tasks in boxes that Percipio requires to accurately capture and deliver class completion data.



*Percipio only reports completion data for classes that have been published and marked complete within 29 days.
**Percipio completions automatically load to HCM and CU-SIS overnight.

Note: While this guide describes several tasks that Percipio ILT administrators can perform, this diagram emphasizes the tasks that ensure accurate course completion data in the systems of record.

Requesting a New ILT Course

The process of creating a new ILT course involves multiple systems and must be performed in a specific order. ELD, and **only** ELD, creates new ILT courses in HCM, CU-SIS (if applicable), and Percipio. Courses must be created in HCM before they are made available for editing in Percipio so the completion records can be connected and tracked correctly.

To request a new ILT course:

1. Go to the Percipio Administrators Training Website located at https://www.cu.edu/employee-services/professional-growth-training/training-services/Percipio/Percipio-administrators.
2. Click **Request a New ILT Course**. An online form appears.
3. Enter details about the course and click **Preview**.
4. When you are satisfied with the form, click **Submit**.

ELD receives your request and uses the information you provide to create your course in HCM, CU-SIS (if applicable), and Percipio. Because HCM assigns a unique course ID, courses **must** be created in HCM first. Without the HCM course ID, your course classes in Percipio will not report completion information to the learner's record. The HCM course code is assigned to the course's title, and it is reported in HCM based on the title submitted in the online form. If an ILT administrator changes the title (which they should not do), it will affect all previous completion records and reporting.

ELD authorizes your Admin security access in Percipio, which lets you manage classes for your courses. You are responsible for setting up the classes, as described later in this guide.

Caution: Only a member of the ELD team can create an ILT course. Once created, the course's title and information must not be changed because it applies to the history of completions. If changes are needed, they must be requested by sending an email to system.training@cu.edu. If a course becomes obsolete, do not try to re-use it for a new course because it will affect all previous completion records, thereby creating inaccurate history. Always request a new course from ELD.

Accessing a Course

After ELD creates the course in HCM and Percipio, you can manage the course and its classes. This task is performed on the Live Courses (ILT) page.

To access and locate your ILTs in Percipio:

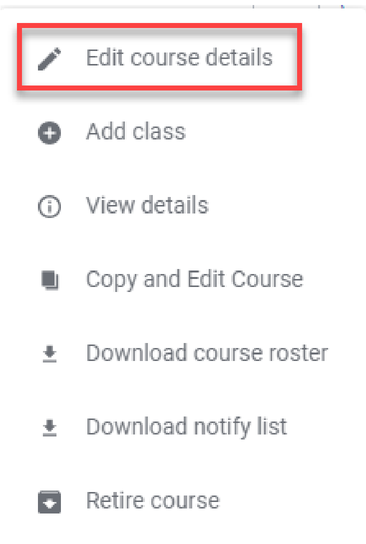
1. When you login to Percipio, you see the system as a learner would, so begin by clicking **Switch to my admin view** at the top-left corner.
2. From the menu on the left, click **Content** and select **Live Courses (ILT)**. Percipio displays the Live Courses page.

   Note: You will see a list with all available ILT titles. You can expand a title to see its related classes.
3. Review the list of courses, or search for a specific course by using the **Search Live Courses** field.

Editing a Course

To edit information about a course, such as the description or the enrollment settings (**Note**: Clicking the information icon ⓘ will display an explanation of the section):

1. After locating the course, click the **Actions** menu icon and select **Edit course details**.



2. In the Edit course details page, you can **update** the following:

   - The course's description (do **not** edit the course's title). Course description is a mandatory field, so you cannot leave it blank.
   - The course image, if needed. This is a mandatory field. You can also add alternate text (Alt text) to the image.
   - The content language. English is selected as the default language. This is a mandatory field, so you cannot leave it blank.
   - The estimated duration. This is a mandatory field, so you cannot leave it blank.

   Note: Do **not** change the Content Source because it is connected to reporting.

3. In the Edit course details page, you can **change** the following optional items:

   - Additional information specific to the course. This content is visible to learners on the course landing page under the general course description before registration.
   - Additional content discovery details. You can specify expertise level, technology titles, and additional search terms.

     Note: Do **not** edit the External ID code because it's related to reporting. If you change it, it will affect accurate tracking.

   - Add registration approval. Do not use this section. Currently, it is not working as expected. Contact system.training@cu.edu for information about alternative options.
   - Customize enrollment settings such as class approvals, waitlist, minimum capacity, and other related settings as needed.

- Set the default location, classrooms, and instructors. This information is applied to all classes by default, but you can customize resources for a specific class in the next section (adding a class). If the class is online, provide a URL when adding a class.
- Add course contact information for learners who have additional questions on the course.

4. If you made any changes or updates, click **Save and publish** to confirm them.

Creating a Class

After editing course information, as needed, you can create classes for the course. A class is an instance of a course that occurs on a specific date, time, and location (facility and classroom). A class includes an instructor and students.

Note: After you create the first class of a course, you can copy it to create additional classes by clicking the **Actions** menu icon and selecting **Copy and edit class** or clicking **Add class** at the top right side of the screen.

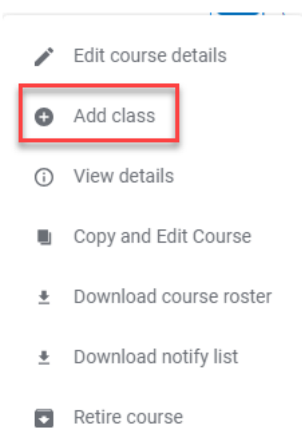
Before you start, make sure you have the following information to specify for your session:

- Location of the session (campus, building, room)
- Schedule details for each session (date, time)
- Capacity (how many people can attend) – This number will determine when the session is full.
- Instructor (first and last name, email address)

Note: The class details listed above are created and maintained by ELD. If you do not see an instructor, facility, or classroom listed, email system.training@cu.edu to have them added.

To create a class:

1. From the Live Courses page, locate the course to which you are adding a class instance.
2. Click the **Actions** menu icon and select **Add class**. The Add class page opens.



The Add class page lets you specify the details of the class.

1. Add a title. Percipio automatically adds “Class #” in consecutive numbers for each class, but you can edit it to reflect your tracking/editing preferences.
2. Verify that the time zone listed is correct. To update the time zone, expand the **Timezone** dropdown menu to select the correct time zone.
3. Add class dates and times.
    a. Select or enter a date, start, and end time by typing the information or expanding the calendar/clock icons. Selecting a date using the calendar helps avoid mistyping the date.
    b. If your session takes place over multiple days, click **Add another required date and time for this class** and repeat these steps. If you need to remove an unused session, click Delete (trash bin icon).
4. Specify the maximum enrollment capacity for the class. This setting sets the maximum number of registrants allowed for a class, including both online and in-person registrations. If there is more than one meeting time for a class, this number applies to all of them.
5. Add the instructor.

    Add instructors by typing in the Instructor name field to select them and then grant instructor privileges. If the person you are looking for is not on the list, contact system.training@cu.edu.
6. Specify the location.

    The location of a session includes a facility and a classroom. Many of the CU campus facilities and classrooms have already been entered and saved into Percipio by ELD. If you do not see the facility or classroom you need, email system.training@cu.edu to have it added.
7. Add location information.
    a. Select one of the following: **Both in person and online**, **In person**, or **Online**.
        - NBased on your selection, you will need to add a location and classroom, and/or a URL in the Add classroom and Add URL sections.
        - You can provide additional information such as passwords or instructions for online classes. Learners see this only after they register.
8. Add additional notes for learners. The notes are visible to learners on the course landing page under the class name.
9. Update class enrollment settings if they are different than those specified at the course level.
You can update the following items:
    a. If capacity is reached, allow learners to join the waitlist. When learners are registered for a class from the waitlist, either automatically when a spot opens up or manually in the roster, they will receive an email registration confirmation.
    b. Allow learners to self-register for classes or not. If yes, a registration button will appear to the learner. If no, the class status will be indicated as closed.

   c. Either close self-registration one or more days before the class, or set to zero to allow self-registration until the class starts.

   d. Indicate whether learners may self-cancel their registration from class. When learners self-cancel their registration, they will receive an email notification.

   Note: Admins can review who withdrew their registration on the Class audit page. See Other Roster Actions (Course Roster and Class Audit) on page 12 for more information.

   e. Either close self-cancellation one or more days before the class, or set to zero to allow self-cancellation until the class starts.

   f. Specify the minimum enrollment capacity. If the minimum number is not met by a number of business days prior to the class start date, Percipio will notify the admin and the instructor.

10. Add course contact for learners who have additional questions on the course. Updating this section is optional. If you do not update this section, readers will be directed to email system.training@cu.edu for assistance.
11. Complete class setup.
    - Click **Review and publish** to verify that the information is correct.
    - Select **Save and publish** to make the class visible to learners. You need to select save and publish for employees or students to enroll and receive credit for completion.
    - Select **Save as draft** if you need to finalize the details.
    - Select **Cancel** if the class is no longer needed.

Note: You can identify the status of the class by checking the Status section at the top right side of the Add Class page or in the Status column on the Live Courses page.

TYPE	STATUS	CLASS STATUS	CLASS START DATE	LANGUAGE	REGISTRATIONS	WAITLIST
Course	Published			English (US)		

After the class is published, you can choose any of the following from the **Actions** menu.

- Edit class details.
- View details.
- Copy and Edit Class.
- Manage roster.
- Cancel the class.
- Download the Class Audit.

Managing Class Registrations, Waitlists, and Completions

To manage class registrations, waitlists, and completions, you need to access the class roster. The roster includes a list of registered learners, wait-listed learners, and details of the class, such as capacity, status, start date, and location.

Managing and Viewing a Roster

Administrators can manage rosters, while Instructors can view them.

For an administrator to open a class roster:

1. Sign into Percipio.
2. From Content, click **Live Course (ILT)**. The list of live courses displays.
3. From this list of courses, locate the specific class and click the **Actions** menu icon in the Actions column, then select **Manage roster**.

Instructors can view a roster as follows:

1. Sign into Percipio.
2. Select the profile icon in the top right corner. From the dropdown, select **My Learning.**
3. On the My Learning page, scroll down and select **Instructor** schedule under Management.
4. The list of classes assigned to you displays on a new page.
5. From this list of classes, locate the specific class and click **View roster**.

After opening the roster for a particular class, you see the class start date, the class capacity, and the number of registered learners across the top of the page. If you need additional details, click the **View class details** button.

The list of registered participants appears under the Registered learners tab. To see learners who attempted to register after the registration window closed or class capacity was reached, click the **Registration waitlist** tab.

Registering Learners for a Class

Whether or not you allowed learners to self-register, you can register learners for a class from the roster. When registering learners, keep the following in mind:

- If multiple classes are available for one course, a learner can only be registered for one of its classes at a time. If a learner is currently registered for a class that is in progress, you cannot register them for a different class until all days and times of the current class have ended and you marked them incomplete.
- You can register learners even if the class is over capacity.

To register a learner:

1. Locate the specific class and click **View roster**.
2. Click **Register**. The Register learners for class popup appears with three tabs available:
    - **Search Existing Percipio Users:** Use this tab if you know learners have a Percipio user account and there are not too many learners that you need to register.

a. Type the learner name in the Learner name field. As you type, Percipio finds matching user accounts.

b. Select the matching user account.

c. You can repeat until all learners you want to register display.

d. Click **Save and add**. All learners get added to the registration list and receive a registration email confirmation.

- **Register learners from CSV**: Use this tab to register a long list of learners from a comma-separated value (CSV) file.

  a. Click **Download Template**. The Excel template is downloaded to your Downloads folder.

  b. Open the CSV file in your preferred editing application, such as Microsoft Excel or Google Sheets.

  c. For each learner you want to register, add **either** their Percipio Login name, Email, or External User ID. Specify only one learner per row.

  d. Save the file in the native CSV format.

  e. On the Register learners from CSV tab, click **Select a file**.

  f. Locate the file and click **Open**.

  g. Click **Register learners to this class**. All learners get added to the registration list and receive a registration email confirmation.

- **Add new Percipio Users:** You cannot add new users because SSO provisions users.

Canceling a Learner's Registration

You can only cancel a learner's registration prior to the class start date. After the class start date passes, you have to wait until the last date and time of a class before you can mark the learner incomplete and register them for another class.

To cancel registrations:

1. Locate the specific class and click **View roster**.
2. Open the **Registered learners** tab.
3. Determine whether you have one or more learner registrations to cancel:
   - For multiple learners, click the **Actions** button above the list of User IDs and select learners to cancel.
   - For an individual learner, locate the learner in the list and click the **More actions** button.
4. Click **Cancel registration**.

When you cancel a learner's registration prior to the start date:

- Percipio sends a notification email that the registration was canceled.
- The class shows as available in the live course list as long as the class is not full.
- The learner can re-register for that class or a different class of that same course.

Managing the Waitlist

From the roster, administrators can register and remove learners on the waitlist.

To manage the waitlist:

1. Locate the specific class and click **View roster**.
2. Click the **Registration waitlist** tab.
3. If you are managing one learner at a time:
    a. Locate the learner in the list.
    b. Click the **Actions** menu icon in the Actions column.
    c. Select the appropriate option: **Register for this class**, **Register for a different class**, or **Remove from waitlist**.
4. If you want to manage multiple learners at the same time:
    a. Click the **Actions** button above the list of learners.
    b. Select all or specific learners using the check boxes to the left of the learners' names.
    c. Select the appropriate option: **Register for this class**, **Register for a different class**, or **Remove from waitlist**.

When working with the waitlist, keep the following in mind:

- When you register a learner to a class, Percipio automatically removes them from the waitlist.
- You can register learners to a class even if the class will be over capacity.
- You can register a learner for a different class within the same live course. If that different class is also at capacity, you can add the learner to the waitlist of that other class or override its capacity.
- Canceling a waitlist request removes the learner from the list, but does not prevent the learner from joining it again.

Marking a Class Complete and Giving a Score

After a class ends (for a multi-day class this is after the last date and time has passed), you can mark it complete for each learner. Learners see the course as Started in their Activity until you mark it complete.

Caution: Once you mark a user complete, you cannot change your action or their score.

1. Click the **Registered learners** tab.
    a. To mark a single learner complete:
        i. Locate the learner in the list, click the **Actions** menu icon in the Actions column, and select **Mark complete and score**.
        ii. Specify the date that should appear for completion, today's date or the date of the class.
        iii. Enter a score for the learner. This field cannot be blank, even if it's listed as optional.
        iv. Click **Save**. The learner sees the score and completion in their Activity.

b. To mark multiple learners complete:

  i. Click the **Actions** button.
  ii. Select all or some of the learners using the check boxes on the left.
  iii. With learners selected, click **Actions** again and select **Mark complete and score**. You are prompted to enter a date and score which will be applied to all learners selected.
  iv. Enter a score.
  v. Click **Save**. Learners see the score and completion in their Activity.

c. To mark learners complete with a CSV file:

  i. Click **Bulk mark complete**.
  ii. Select the date that should display for completion, today's date or the end date of the class.
  iii. Click **Download CSV template**.
  iv. Open the downloaded template. For each learner, add a new row. Specify each learner's email address or User ID in the labeled column. If you want to add a score, include the score in the Score column.
  v. Save the CSV file.
  vi. Add the CSV and select **Mark complete**. All users in the CSV file are marked complete.

Note: When you mark a course complete for a learner, the following occurs:

- Once you confirm your selection as complete, you cannot make any changes to the completion status or score.
- If you perform a bulk action on a learner who already has a completion status and score, no changes are made to that learner.
- Learners see the completion status in their Activity from My Profile.
- When you select bulk action and enter a score, all learners selected receive that score.
- When completing a class, you must specify a completion date. This can be the date of the last class or the date you are entering the data (today's date).
- If a learner who attended is not on the registration list, you can add that learner at this time.
- If all learners are marked complete or incomplete, the Class state changes to verified from ended.

Marking a Class Incomplete

After a class ends (for a multi-day class this is after the last date and time has passed), you can mark it incomplete for a learner who did not attend or meet participation requirements. Learners see the course as Started in their Activity after you mark it incomplete.

Caution: Once you mark a user incomplete, you cannot change your action.

From the the Registered learners tab, you can mark one or more learners as incomplete.

To mark a single learner incomplete:

1. Click the **More actions** menu for the learner and select **Mark incomplete**.
2. You are prompted to confirm your selection.

To mark multiple learners incomplete at the same time:

1. Click **Actions**.
2. Select all or some of the learners using the check boxes on the left.
3. With learners selected, under Actions, click **Mark incomplete**.
4. Click **Save**.

Note: When you mark a course incomplete for a learner, the following occurs:

- Once you confirm your selection for incomplete, you cannot make any changes to the completion status.
- If you perform a bulk action on a learner who already has a completion status, no changes are made to that learner.
- Learners with an incomplete see the course as Started in their Activity from My Profile.
- If you mark a learner incomplete, they can register for another class.
- If all learners are marked complete or incomplete, the Class state changes to verified from ended.

Downloading the Roster

You may want to print the roster to use as a sign-in sheet or share it with those who do not have online access.

1. Click **Download**.
2. Select the type of data for your download: registered learners or registration waitlist.
3. Choose either PDF or CSV format.
4. Save the file in the desired location.

Other Roster Actions (Course Roster and Class Audit)

Any Percipio role with roster privileges, except instructors, have two additional actions they can take with regards to the roster: downloading the roster and downloading the class audit file, which is a record of changes made to learner registrations and who made them.

To download the course roster, from the Live Courses listing, select **Download course roster** from the **Actions** menu.

The course roster downloads as a CSV file. This file contains a list of learners who have interacted with at least one class associated with the course. The learners are grouped by class title, learner status (registered, waitlisted, approved, denied), and completion status.

To download the class audit file, select **Download class audit** from the **Actions** menu. The file downloads as a CSV file containing the history of changes to learner registrations, including, approvals, denials, and cancellations.

The CSV file provides specific class details at the top and then contains the following sections:

- **Learner registrations:** Shows each learner who was registered to the class, who registered them, and on what date.
- **Registration approvals:** Shows each learner whose registration request was approved, by whom, and on what date.
- **Registration denials:** Shows each learner whose registration request was denied, by whom, and on what date.
- **Canceled registrations:** Shows each learner whose registration request was canceled, by whom, and on what date.
- **Canceled waitlist requests:** Shows each learner whose waitlist request was canceled, by whom, and on what date.

Notifications

Percipio sends an email notifying learners, admins, and instructors when things change regarding Live Course activities.

Learners receive emails about custom live courses when the following actions occur:

- Learner registers for, or cancels a class.
- Learner joins a waitlist.
- Administrator modifies or cancels a class the learner is registered or waitlisted for.
- Administrator adds a class to a course that the learner has added to their playlist.
- Administrator or manager approves or denies a registration request.
- When a class is starting soon, Percipio sends automatic email reminders seven days prior, three days prior, and one day prior to the start of the class. Percipio does not send emails on weekends. If a class starts on a Monday, the learner only receives the first two emails. These emails are sent at the system level. To customize them, add relevant content to the class description.

Notify List

When a learner clicks **Get notified when new classes are available** from the enroll in the ILT page, their information is saved and can be retrieved by clicking the **More actions** icon and selecting **Download notify list**.