

# Release Notes Learning Management

Release 2016-11

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**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from our customers. Where relevant, we have included a number in the section title to refer to the identification of the message (change .....) in question in our system.**

## New

### 1. Budgets - expected costs as well as costs spent

#### Why

For some time now, Learning Management has provided the option to record training budgets and training costs. However, the remaining budget was calculated only on the basis of the budget actually spent, based on the employees who had taken the training program. No account was taken of any expected costs of training from outstanding training requests and employees who had been assigned to training programs. In order to get a complete picture of the outstanding budget, these expected costs should be included as well.

#### How

The budget functionality has been expanded by including expected costs. These expected costs occur at the three existing levels:

- Organization
- Department
- Employee

The new functionality has been described for the department level below, but its operation is the same for all levels. This means that this description also applies to the organization and employee levels.

If you have recorded budgets at department level, you will see the budget widget in the department details screen. This means that the budget widget is no longer only visible in the *Change Department* screen.

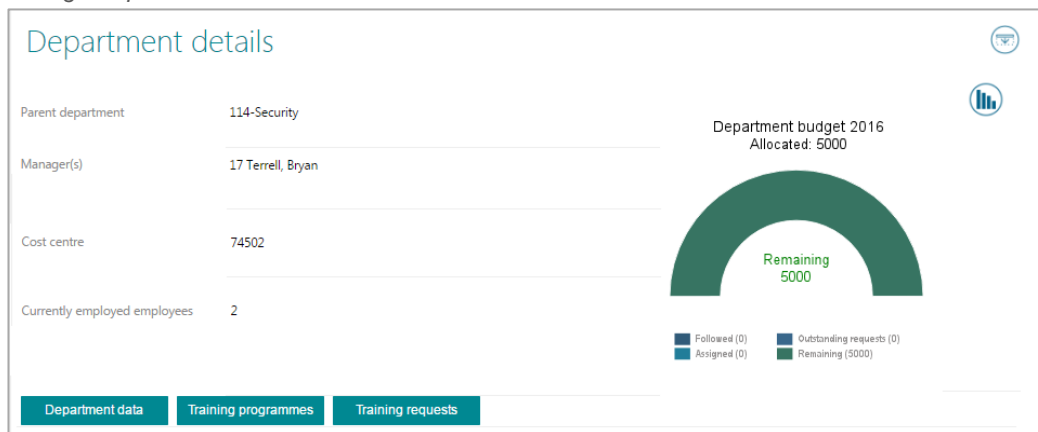


fig. 01

Where the widget only used to distinguish between remaining budget and budget already spent, you will now see different categories:

- Followed - the budget that has actually been spent
- Assigned - expected costs constituted by employees who have been assigned to training programs
- Outstanding requests - expected costs constituted by training requests that have been submitted by employees
- Remaining - the budget that can still be spent

Of course, here, Learning Management takes into account the authorization assigned to the user. Furthermore, costs are only considered at department level if they are actually charged to the department budgets. You can record this setting for every individual training program. Otherwise, the recording of training costs and budget type has not changed.

Fig. 02 below shows a practical example of a department with both spent and expected costs.

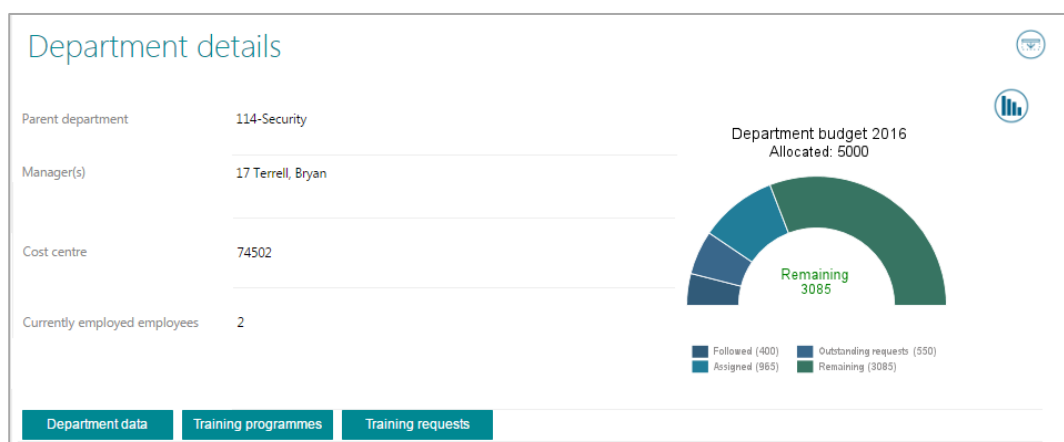


fig. 02

The above example (fig. 02) shows:

- Expected costs of EUR 550 for outstanding training requests (regardless of whether they have been approved)
- Expected costs of EUR 965 for assigned employees
- Actually spent costs of EUR 400 for training programs taken
- Remaining budget of EUR 3085

The widget enables you to select or unselect the different categories.

Learning Management calculates the costs per employee as follows:

$((\text{fixed costs per session}/\text{number of participants}) + \text{costs per employee}) * \text{number of participants}$   
from the department in question

### Example

- 10 participants in a session, 3 of whom come from department A
- Fixed costs per session = EUR 500
- Costs per participant = EUR 100

This makes the training costs for department A  $((500/10)+100) * 3 = \text{EUR } 450$ .

The icon in the top right corner of the budget widget lets you change the widget view to historical budget information (fig. 03).

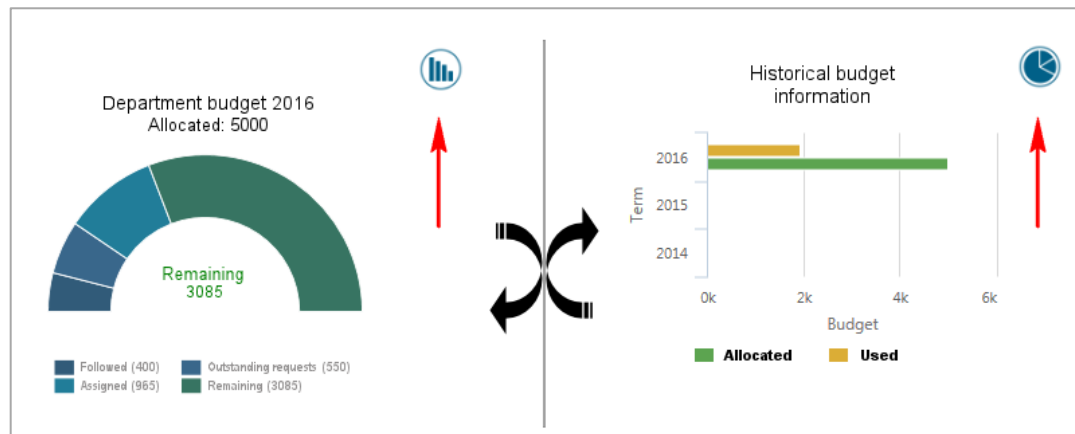


fig. 03

The historical budget information shows the allocated and the spent budgets for the current term and for the two previous terms.

Another new element introduced by this release is the calculation of the budget needed, based on mandatory training programs. This budget is calculated in real time. You can find it in the *Change department* screen and it is based on the mandatory training programs that the employees of the department in question must take (fig. 04)

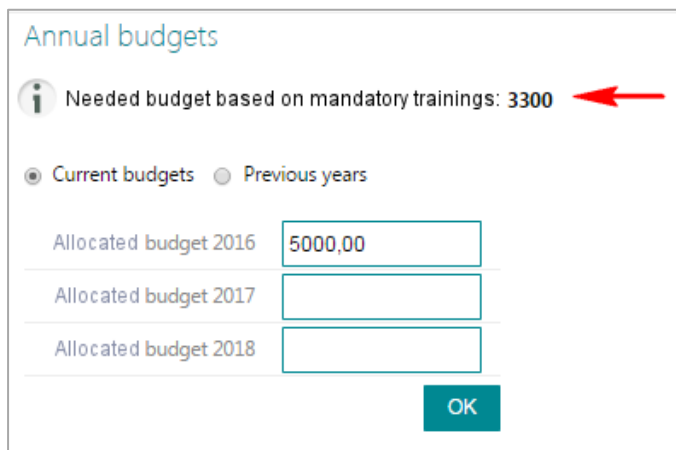


fig. 04

Learning Management also has the *Budget overview* function. This screen shows you the allocated and remaining budgets for the individual budget types. This functionality has also been expanded by both the expected costs and the remaining budget including and excluding the expected costs.

We have also implemented the new functionality of expected costs in the budget reports. The *Remaining budget by department* and *Remaining budget per employee* reports show the remaining budget including and excluding the expected costs.

### Your action

You do not have to do anything if you already use the budget functionality. This new functionality is available automatically. However, if you wish to continue as usual and only work with the costs based on the budget that has actually been spent, you can deactivate this option under Settings > Control Data > Miscellaneous > Remaining budget including forecast. If you do not use the budget function yet and you would like to know more about it, please refer to the release notes of September 2014.

## 2. New merge fields in Youforce Docs

### Why

Learning Management enables you to generate various documents, such as attendance lists, certificates, invitations and study contracts, using various merge fields that enable you to configure your own templates. However, in practice, a need was felt for two additional merge fields: *Employee's email address* and *Session notes*.

### How

We have added these new merge fields so that you can use them for your own templates in Youforce Docs.

## Solved messages

### 3. Generating certificates was not always possible (change 5358)

#### Message

Generating certificates by means of Youforce Docs was sometimes not possible.

#### Solution

With effect from this release, authorized users are once again able to create certificates for participants who have already taken the training program and for assigned participants.

### 4. Sending email from waiting list/Assign asap (change 5462)

#### Message

If an employee submitted a training request from the waiting list, no emails were sent to the manager or to the employee.

#### Solution

This has been resolved. From now on, the manager will receive an email and the employee will receive a confirmation email regarding their request.

### 5. E-learning programs erroneously placed in education history (change 5601)

#### Message

When an employee started an e-learning program, it was immediately placed in the employee's education history.

#### Solution

From now on, e-learning will not be placed in the education history until the program has been completed.

## 6. Presentation of blocked departments in the Change training program screen is light gray from now on (change 68184)

### Message

The *Change training program* screen did not make any visual distinction between current and blocked departments. This did not improve user friendliness.

### Solution

With effect from this release, blocked departments will be presented in light gray and current departments will continue to be presented in black.

## 7. Other findings resolved

Changes 68761, 3617, 4294, 5360, 5500, 2707, 3490, 66278, 68100, 68808, 68995, 69960

Besides the above items, some minor findings have also been resolved. Feedback on them will be given in the usual way.



# Release Notes Learning Management

Release 201610

# Content

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This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message (change .....) in question in our system.

## New

### 1. Importing sessions

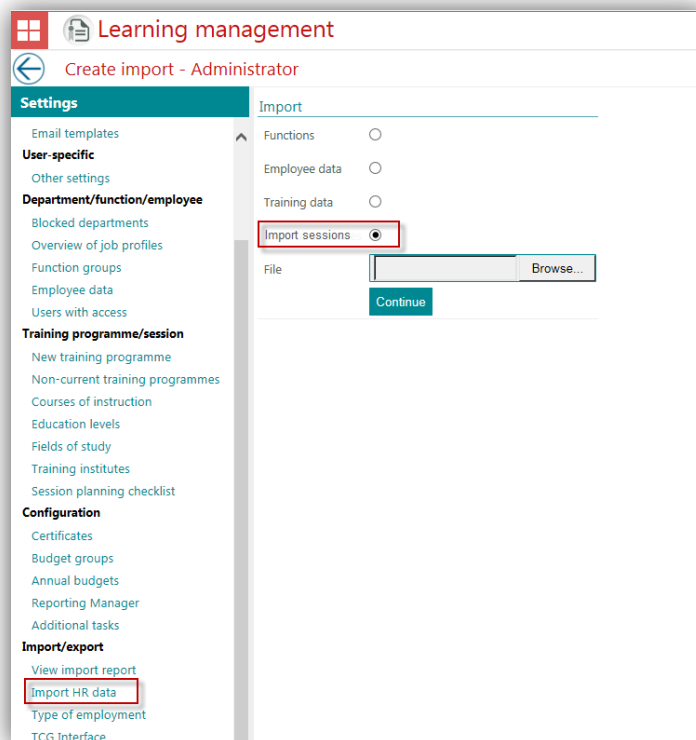
#### Why

You can add one or more sessions to every training program in Learning Management. This used to be an action that you had to perform for every individual session. However, if you wish to record several sessions at once, e.g. because you wish to provide an insight into the sessions planned for the next three months, it would be convenient if this data could be imported at once.

#### How

*Path: Settings | Import / Export | Import HR data*

The existing **Import HR data** screen was expanded by an extra option to import sessions.



The **browse** button lets you upload the file with sessions. You can carry out the final import in the screen that follows.

The file to be uploaded must be of the CSV type (with a comma as a delimiter), with the following columns:

- Training program code\*
- Start date \*
- Start time
- End time
- Course of instruction
- Training location
- Teacher
- Number of participants for the method \*\*
- Minimum number of participants
- Maximum number of participants
- Comments

\* The *training program code* and the *start date* are required fields. If they are not included, the session in question will not be imported.

\*\* The following applies to the *Number of participants for the method*:

0 = Default value based on the dates stated at the *Training program*.

1 = Overwrite, there is no limit for this session.

2 = Overwrite with a minimum and a maximum value. In that case, the *Minimum number of participants* and *Maximum number of participants* columns are also required to be filled.

After importing the sessions, they are immediately available with the training programs in question.

## Changed and improved

### 2. Improved multilingual functionality

#### Why

Learning Management supports several languages. However, this functionality had not been fully implemented on all screens.

#### How

This release introduces the following improvements as regards the multilingual functionality:

- The attendance list is now available in several languages.
- Any missing or incorrect translations have been corrected in several screens.
- Translation buttons have been added to enable you to record your customer-specific details.
- The currency (euro) is no longer shown.
- Automatic emails will now be sent in the default language you have set.

More improvements will be implemented next month.

### Your action

You do not have to take any action. If you use the multilingual functionality, the changes will be implemented automatically.

# Release Notes

## Learning Management

Release 2016-08

August 1<sup>st</sup> 2016

Version 1.0

# Contents

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The release notes contain a description of the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages from our customers. Where relevant, we have included a number to refer to our internal system in which we record messages from customers.

This release contains some improvements to make the system more convenient to use.

## Changed

### 1. Deleting workflows in HRSS

#### Why

You can run the process of approving training requests through HRSS in Learning Management. However, previously, if you removed sessions with open HRSS workflows from Learning Management, they would not be automatically removed from HRSS as well.

#### How

From now on, any workflows that have not been completed yet will be removed from HRSS if you remove the session in Learning Management. This way, the manager will no longer get any redundant requests for approval.

#### Your action

You do not have to do anything. The HRSS workflows are removed automatically.

## Messages resolved

### 2. Place of birth merge field not visible (change 3945)

#### Place of birth merge field not visible in certificate template

#### Message

Youforce Docs lets you generate certificates in Learning Management based on templates of your own making. Previously, if you used the *Place of birth* merge field, this was not shown in the certificate that was generated.

#### Solution

With effect from this release, the merge field is included in the certificate generated.



### 3. Changing training requests handling method (change 4370)

**Changing the training requests handling method is not always possible**

#### Message

In the past, only administrators could change how training requests were handled when creating or editing training programmes. Other roles only were restricted to read only options for this.

#### Solution

This has been changed. Every role that has been authorised to create and/or edit training programmes can also change the way in which training requests are handled.

### 4. Other findings resolved

Besides the above findings, some minor findings have also been resolved. Feedback on them will be given in the usual way.

# Release Notes

## Learning Manage- ment

Release 2016-07

9 July 2016

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This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the headings of individual subjects to refer to our internal system in which we record messages from customers.

## New in this release

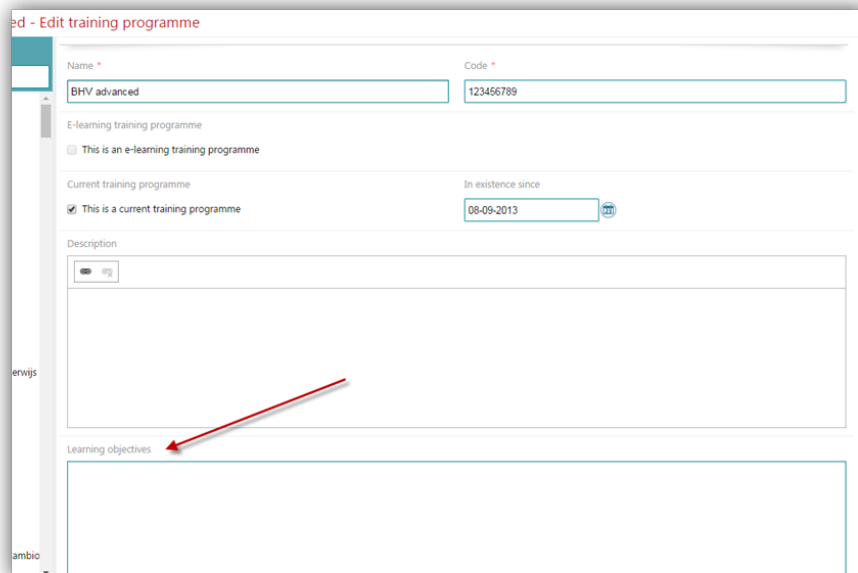
### 1. New *Learning objectives* field in training programs

#### Why

Several customers informed us that they wished to record the learning objectives of a training programme. They had been using the description field for this, but this did not enable them to make this information sufficiently transparent.

#### How

The *Edit training programme* field has been expanded by the *Learning objectives* textbox (fig. 01).



The screenshot shows a web form titled "Edit training programme". At the top, there are two input fields: "Name" containing "BHV advanced" and "Code" containing "123456789". Below these are two sections with checkboxes: "E-learning training programme" (unchecked) and "Current training programme" (checked). The "Current training programme" section includes an "In existence since" date field with the value "08-09-2013". A "Description" field is present, but it is empty. Below the description field is a new "Learning objectives" field, which is a large empty text area. A red arrow points to this new field. On the left side of the form, there is a vertical sidebar with the text "erwijs" and "ambio".

fig. 01

These learning objectives can also be copied when writing certificates to disk.

## 2. Creating certificates based on the education history

### Why

You can record certificates in Learning Management. However, this was not linked in any way to employees taking training programs. Where the system automatically updated the learning history, for instance after a training course for in-company emergency responders had been taken, you had to record the certificate (if relevant) manually.

You also had to take a few extra steps in the application in order to generate a certificate via Youforce Docs after a training programme had been taken.

These extra actions took quite a lot of time.

### How

From now on, you can update both the education history and the certificates and generate certificates (proof of attendance) by means of a single action.

You can activate this function via Settings > Parameters > Miscellaneous with the new control data item *Automatically create certificates*. If this function is active and you change the training status to *Followed*, you will see the following pop-up (fig. 02).

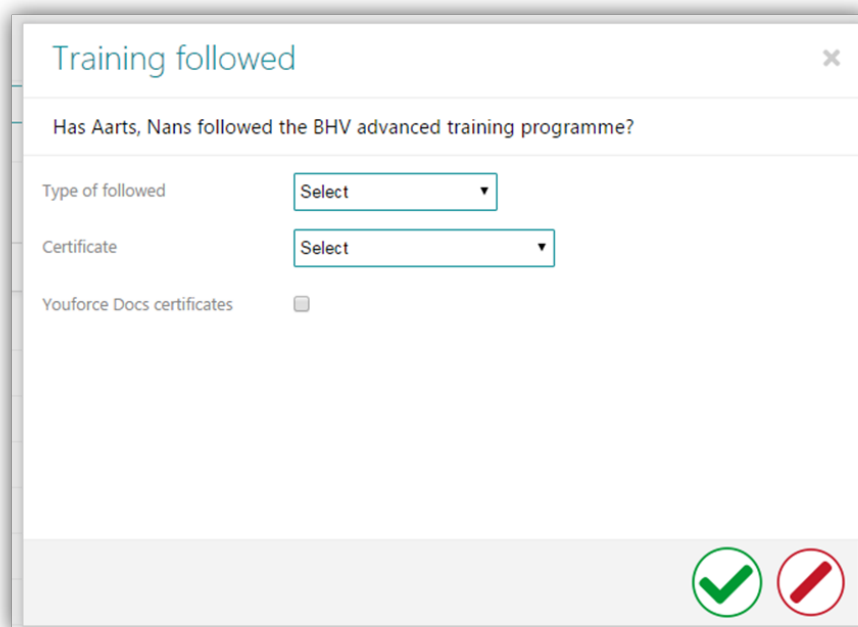



fig. 02

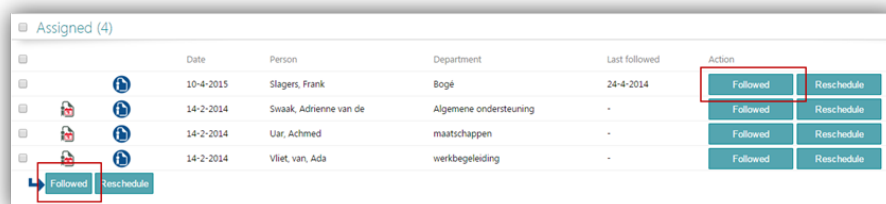
In this pop-up, you can select the type of certificate you would like to create via the menu of the new *Certificate* field. If you select a certificate that can expire, the system will also ask you for the expiry period. You can record this as days or months.

You can activate the new *Youforce Docs certificates* option to have a certificate generated via Youforce Docs.

Click on the  icon to exit the pop-up. The system will then save the certificate to the database while recording the following data:

Field	Data item
Certificate	the selected certificate
Number	empty
Obtained	last day of the training session
Expires	expiry date calculated on the basis of values entered
Description	value from the <i>Learning objectives</i> field as recorded at Education level, see subject 1.

This functionality is available with both the single and multiple selection of employees (fig. 03).











Assigned (4)						Action	
	Date	Person	Department	Last followed		Followed	Reschedule
	10-4-2015	Slagers, Frank	Bogè	24-4-2014		Followed	Reschedule
	14-2-2014	Swaak, Adrienne van de	Algemene ondersteuning	-		Followed	Reschedule
	14-2-2014	Uur, Achmed	maatschappen	-		Followed	Reschedule
	14-2-2014	Vliet, van, Ada	werkbegeleiding	-		Followed	Reschedule

fig. 03

If you select several employees who have taken different sessions, the system will always consider this when saving the *Date obtained* and the *Expiry date*.

## Messages resolved

### 3. New verification of training programme code (change 63069)

#### Message

When recording a new training programme, you also have to state a code. In order to enable reports to be compiled, this code should be unique.

#### Solution

From now on, a message will be displayed if you enter a code that is already being used.

**Note:** we have not corrected any existing codes in your environment. If you change an existing training programme, and its code occurs more than once, the system will report this and you will then have to change the code.

## 4. Incorrect training date in Status of mandatory training programs report (change 3020)

### Message

If applicable, the *Status of mandatory training programs* contains the date when an employee last took the training programme. You would not always see the most recent training date here.

### Solution

Learning Management has been changed to show the most recent training date, even if an older date was added to the education history afterwards.