NEOGOV Employee Manual

Neogov houses multiple modules for the State of Wyoming. This manual is designed to help employees understand each module and their roles and responsibilities within them. Please note: This manual is subject to change as updates to the system become available.

This manual covers

1. Logging Into Neogov
2. Neogov Dashboard
3. Recruit
4. Onboard
5. Perform
6. Learn
7. eForms
8. Analytics and Reporting
9. Helpful Links

Please use the navigation along the left-hand side to jump to the content you need to review. If it is not visible, click the below icon in the upper left corner:

Logging into Neogov

NeoGov can be accessed either through the traditional login page or using single sign-on. The traditional login page will require that you enter login credentials. Employees with a wyo.gov email can use this as their username and reset their password using the “Forget Your Password?” link on the login page. Employees without an active state email will need to contact their HRD representative to obtain their specific username and have a password manually reset. The link to access Neogov with login credentials is below:

https://login.neogov.com/

If you are an employee with an active wyo.gov email address and are connected to the state network, you have the option to bypass a login screen utilizing the below link. State of Wyoming security settings will require you to download the Microsoft Authenticator app to a separate device for 2-Factor Authentication. The first time you connect via single sign-on, there will be instructions to link your Authenticator app to your NeoGov account. This will only need to be completed once. From then on, you’ll be able to easily login to NeoGov without the hassle of remembering a password. The link to access Neogov with single sign-on is below:

https://login.neogov.com/authentication/saml/login/wyoming

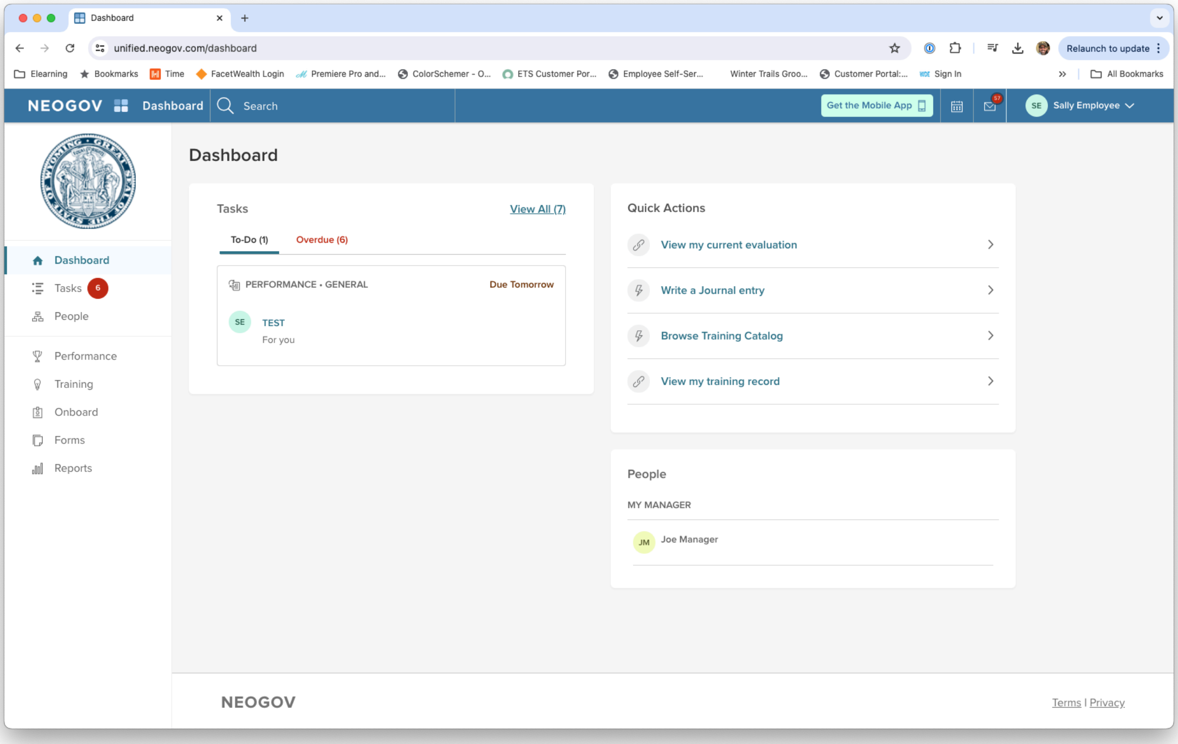
If you normally utilize single sign-on, but try to login to the system when you are not connected to the wyo.gov network (i.e. if you wish to login from home), you will be prompted to login to the State domain. Please note that this is not your NeoGov password. The username will be your email address and the password will be your domain password, i.e. the password that unlocks your computer. If prompted, the Employer Code is **Wyoming**.

Main Self-Service Dashboard

Unified Dashboard

Upon logging in with your NEOGOV account, you will see your Dashboard. This is a single central hub for you to manage tasks, see your direct reports, and update your personal details.

Your Dashboard is made up of widgets that organize information and actions for your staff and yourself. These widgets allow you to take action right from this page and include important metrics, filters, and key information so you can focus on the highest-priority tasks.



Dashboard

My Tasks

Tasks across all Neogov products are accessible in the Tasks widget. This means that instead of switching products to see various tasks, you can see all types of tasks in one spot. Your Dashboard displays your first five upcoming tasks with the earliest due dates. You can use quick filters to get instant visibility on tasks that are Overdue, Due This Week, and Due Later. To see more than the five earliest tasks, the Tasks page in the left side navigation shows a complete listing of the user's tasks across OHC, Onboard, Perform, Learn, and eForms.

People

The People widget allows you to view your manager and any direct reports. For each direct report, there will also be a message to show how many overdue tasks that person has been assigned with a link to a list of the relevant tasks. There is also a link to take the user to the My

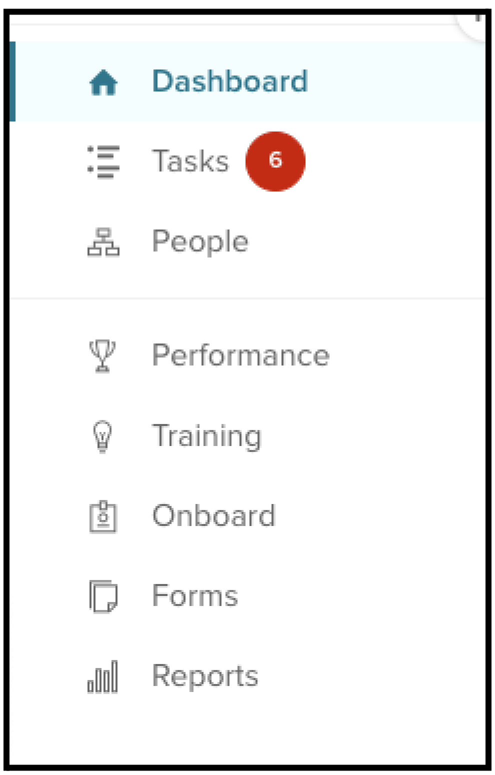
Team page where you can take action on their direct reports. The My Team page is described in more detail in the My Team section below.

Quick Actions

Based on which NEOGOV products your organization has, you'll see a predefined list of Quick Actions. For example, you might see quick actions browse the training catalog, write a journal entry, or create a requisition.

Side Menu

On the left side of your Self-Service page, you will see a side navigation menu. This menu includes quick links to specific pages for product and user role-specific actions. The options you will see here will vary based on your user role.

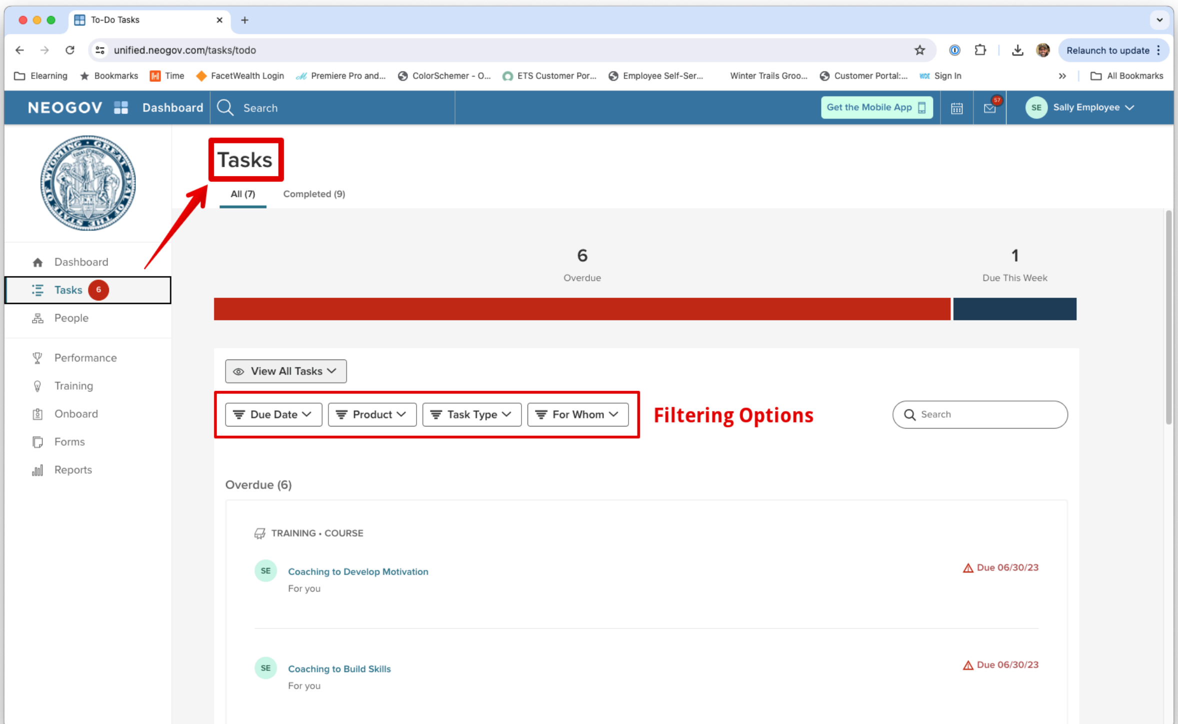


Left Side Menu

Selecting one of the Side Menu options will open the chosen page. The Side Navigation menu will still be available from each of these pages for easy navigation between different work processes. You can also choose to minimize the menu using the arrow icon near the top. Even when minimized, you will still be able to select the page options using the icons. You can expand the menu by selecting the arrow at the top again.

Tasks

The Tasks page allows users to see all of your NEOGOV product tasks in one place. You have tabs for both To Do and Completed Tasks with quick metrics and task due dates on each.



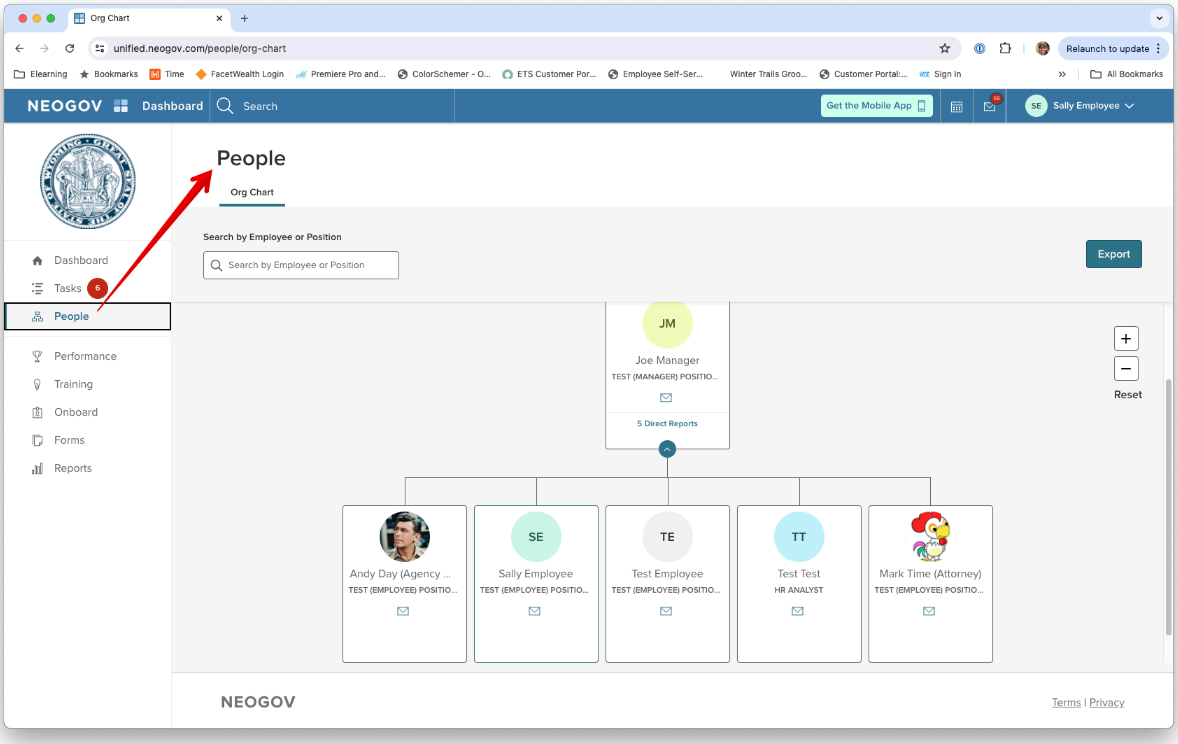
Tasks Page

You can search for specific tasks, or filter the tasks assigned to you by Due Date, Product, Task Type, or For Whom.

You can take action on tasks directly from this page. Simply select the name of the task and the system will take you to the task.

People

The People page gives you visibility on the other employees and managers within your hierarchy.



People Page

Performance

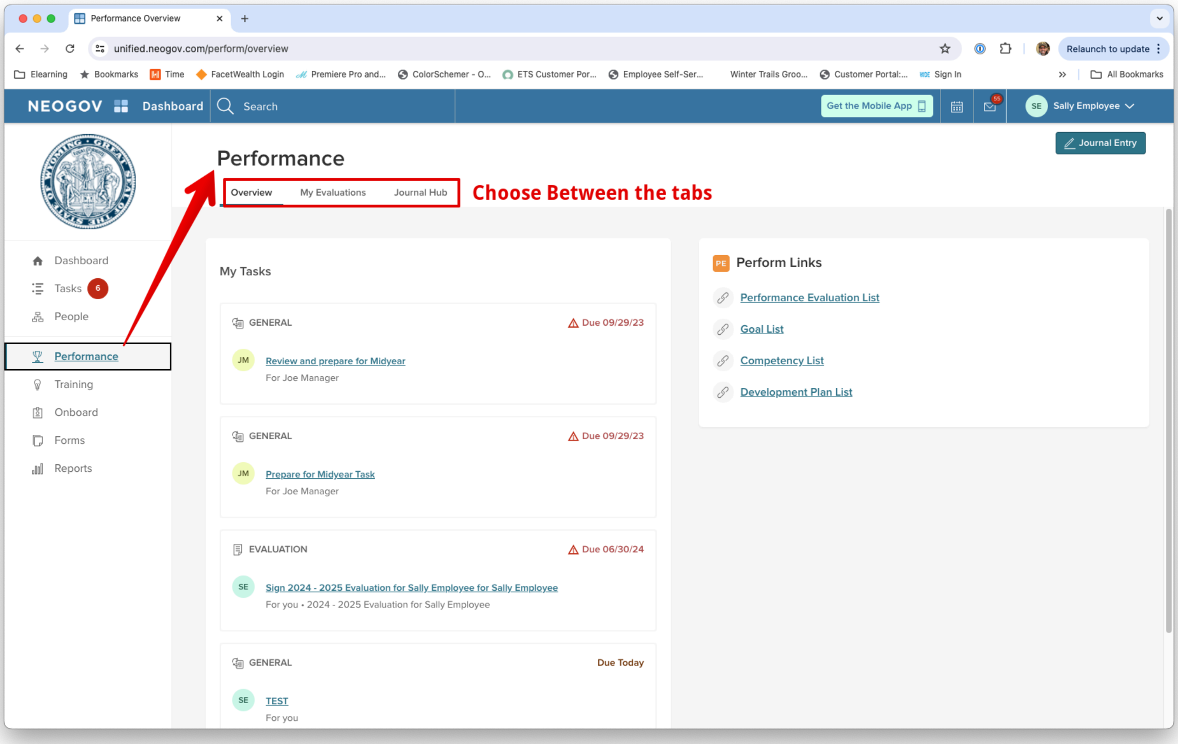
This page shows all information related to performance evaluations including your own evaluations, your team's evaluations, and the journal hub.

You can add a Journal Entry directly from any of the Performance page tabs.

From the Overview tab, you can see your Performance Review related tasks, and your current Performance evaluation.

The My Evaluations tab allows you to see your current and past evaluations. You can filter your evaluation list between Active, Completed, Archived, or Canceled evaluations.

The Journal Hub allows you to see all of your journal entries, including Current, Pending, and Draft entries. This page allows you to see at a glance who an entry is about, who created it and when, and if the entry has been shared or is private. Select the View More button to read the full content of any journal entry.



Performance Page

Training

This page shows all your training information including your courses, available courses on the course catalog, and your training activity report.

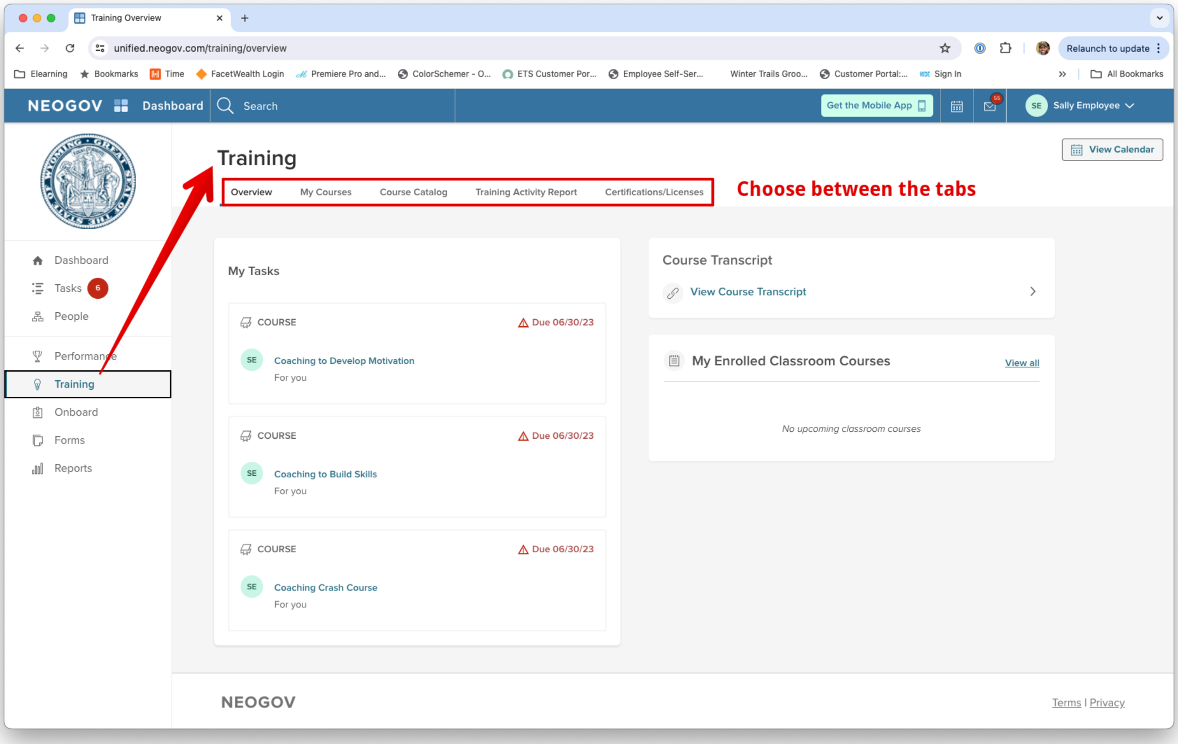
You can View the Learn Calendar from any of the Training tabs.

The Overview tab allows you to see your training related tasks, upcoming classroom courses, and access your Course Transcript.

You can view your past and current enrollments on the My Courses tab. This page lists vital information on your Learning Plans and Courses, including the type of course, its completion status, and whether it is an online or classroom course. You can toggle this list between card and list view, or filter and search the list to see specific enrollments. You can select the individual courses to see more details about the course, review course materials, or take course surveys.

The Course Catalog tab is where you can view and enroll in available courses. This page can be searched or filtered by topic, course type, duration, or category.

The Training Activity Report tab gives you detailed metrics and reporting on your Course and Learning Plan activity. Interactive charts allow you to quickly drill down on your progress to see Overdue or Pending class information. This lets you know right away where to focus your time in completing your workplace learning.



Training Page

Recruiting

This page shows all information related to recruitments you are involved in, including requisitions, job postings, interviews, and hires. If you don't participate in hiring processes, you will not have the Recruiting page available.

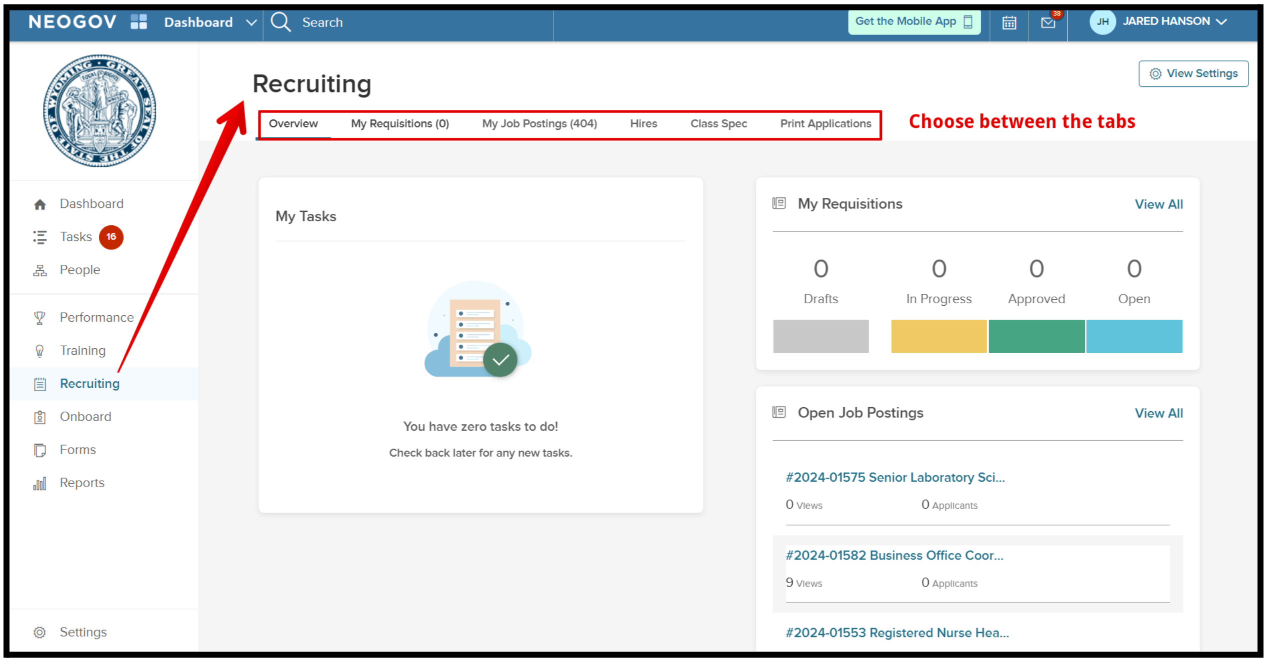
You can adjust the View Settings from any tab on the Recruiting page.

On the **Overview** tab, you can view your Tasks, Recent Hires, Open Job Postings, and interactive metrics. The widgets visible on this page will vary depending on your role and responsibility in hiring. You can click directly on the name of your task, requisition, or hire to open up additional information and actionable steps.

On the **My Requisitions** tab, you can see any requisitions where you are a hiring manager and the requisition status is Draft, In Progress, Approved, or Open. You can click on the name of the requisition to go to it and perform whatever actions are needed.

On the **My Job Postings** tab, you can see all open job postings you have permission to see.

On the **Hires** tab, users will see a list of all hires you are involved in. You can click the hire's name to go to OHC and see more details about the hire.



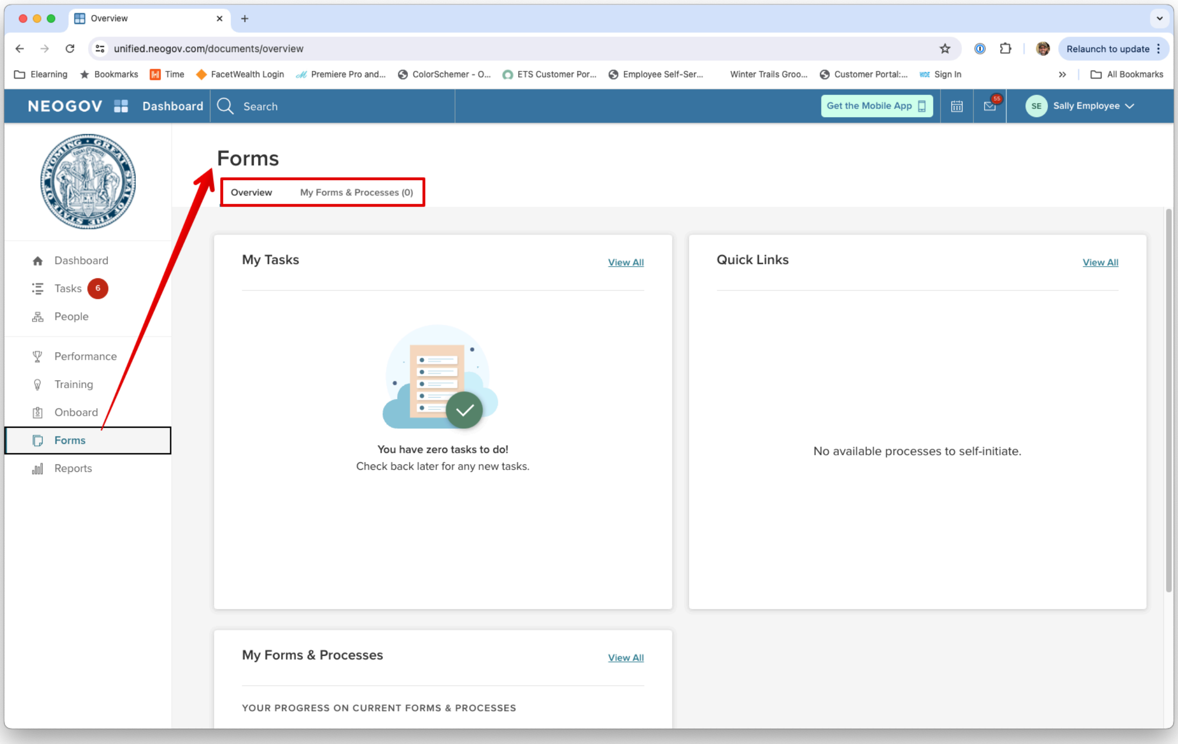
Recruiting Page

Forms

This page shows all your eForms-related processes including your in-progress processes, completed processes, and your team's forms.

On the Overview tab, employees can see their tasks and available forms. Managers will also see interactive metrics on their Team's Forms.

Users can view their Overdue and In-Progress processes related to the logged-in employee. By clicking on the "View All" link, the user will land on the My Forms & Processes tab.

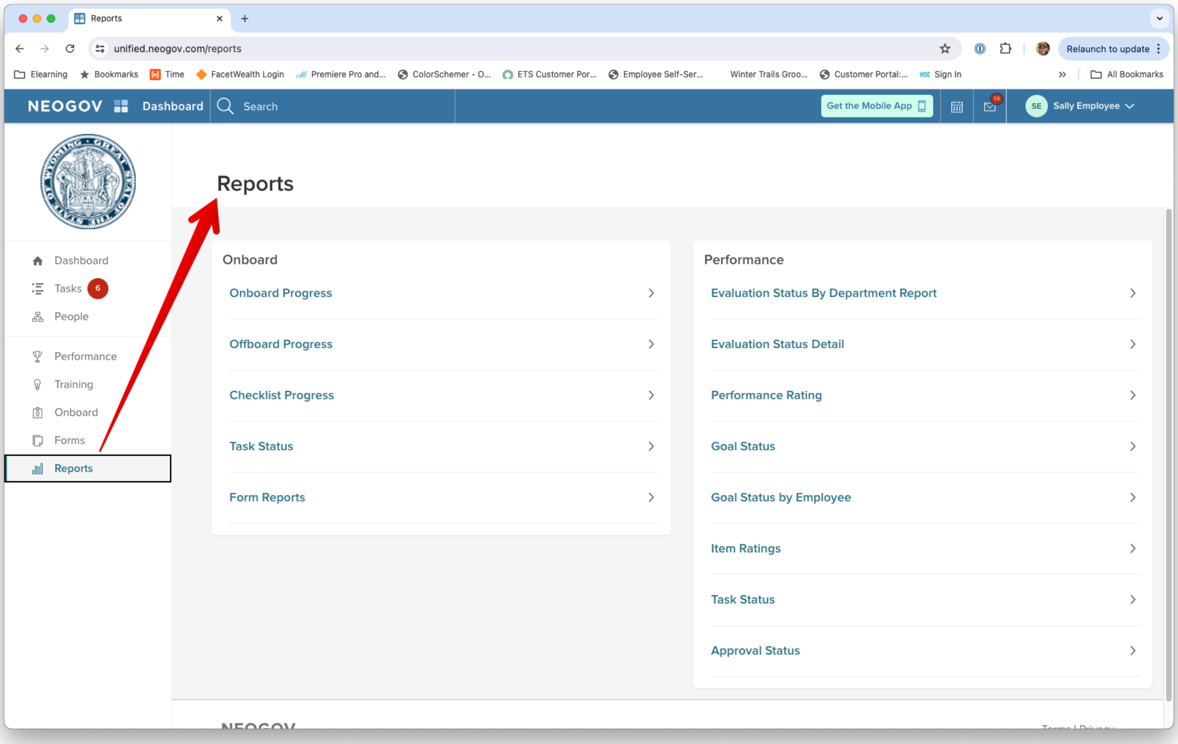


Forms Page

Reports

The Reports tab is available for all Unified Self-Service users. This page shows reports across all products you have access to.

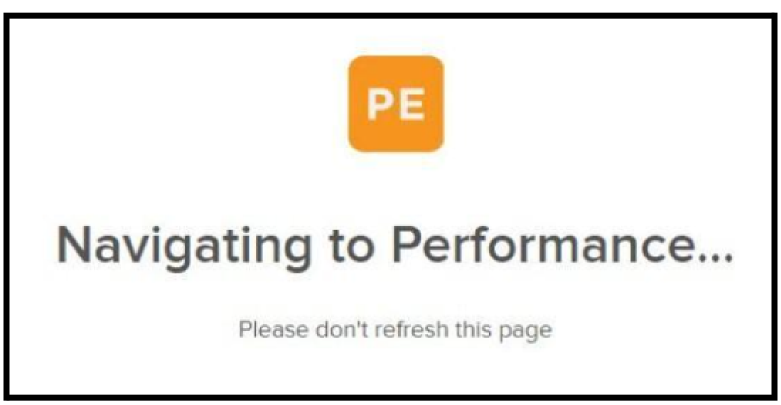
The report options available to you on the Reports page will vary depending on your permissions and scope, and your past activity. You can select a report name, or the arrow beside it to navigate to the Report Generator for that report. You can then filter or sort the report, as well as export it to CSV, PDF, or Excel format.



Reports Page

Performing Advanced Tasks

Sometimes to accomplish tasks or navigate to more detailed visibility, the Unified Self-Service will take you to the NEOGOV Product that the action is tied to. When this happens, the Unified Self-Service will prompt you with a Navigating window or loading screen.



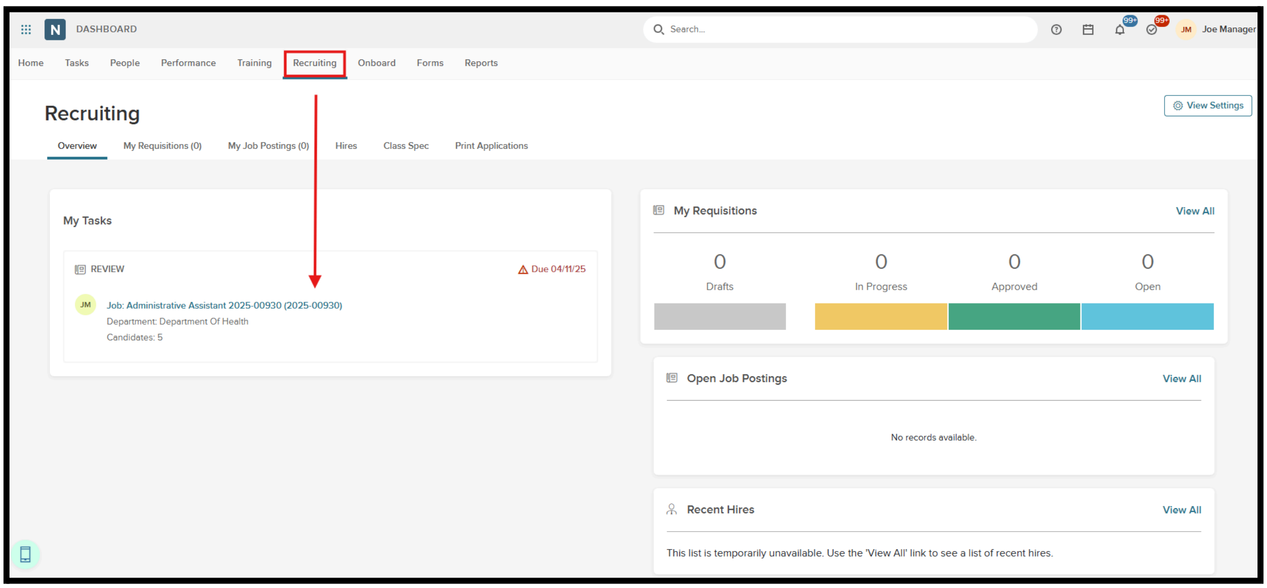
Navigating to the Loading Screen

Recruit

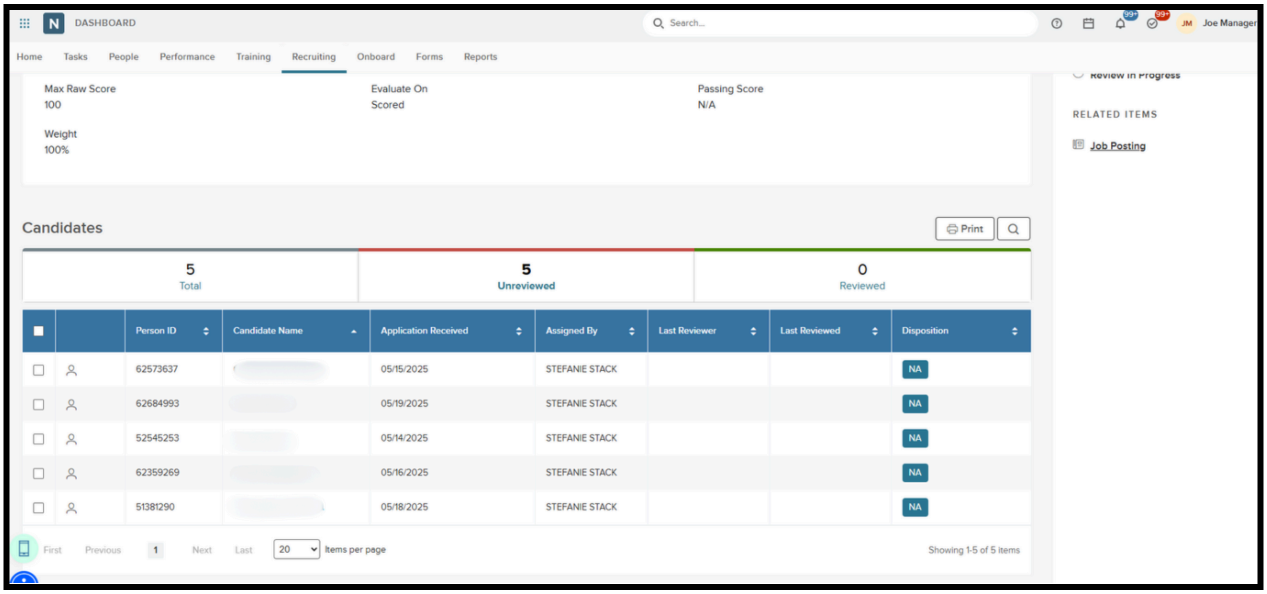
Unified Self-Service Dashboard

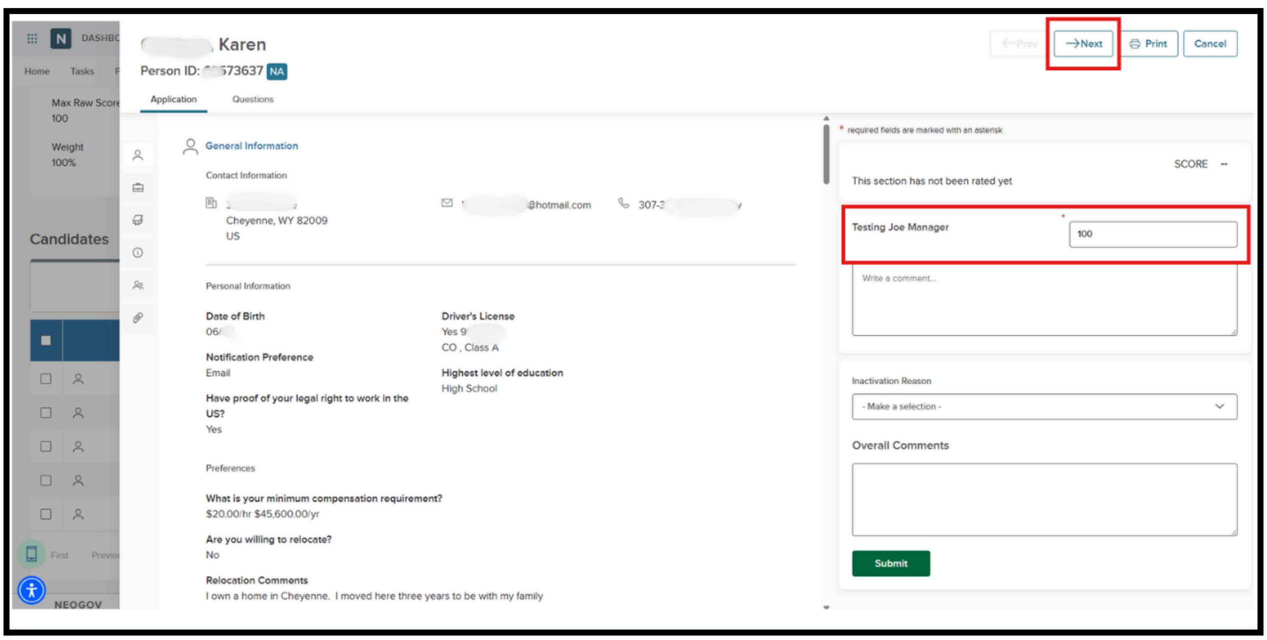
Neogov Recruiting for Hiring Managers

Applications that meet the Minimum Requirements (MQs) for the job's Class Spec will be passed on to the assigned SME Hiring Committee for review. You will receive a task notification and email when an application(s) is ready for your review. Click the requisition title in the My Tasks section to see more details.

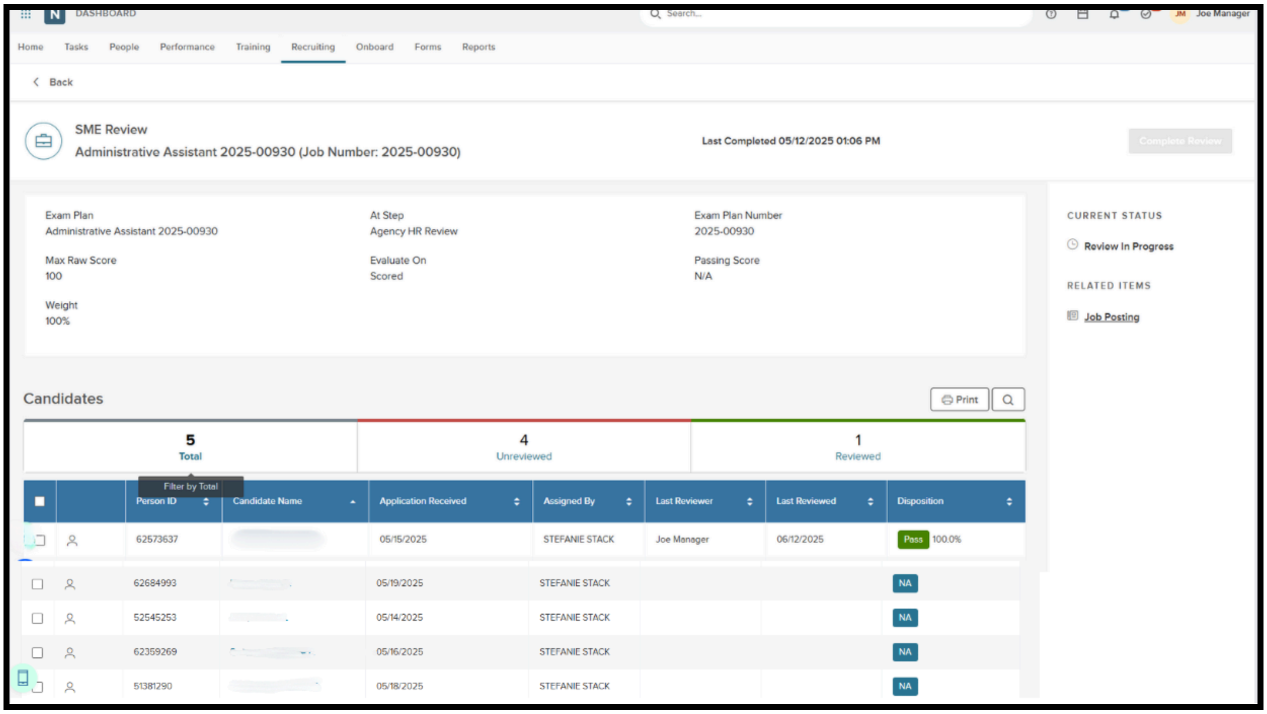


Select the candidate's name to view more information on their application and to complete the scoring.

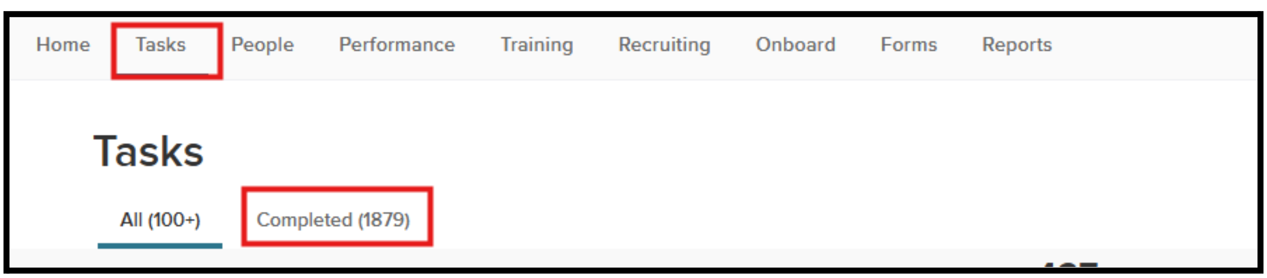




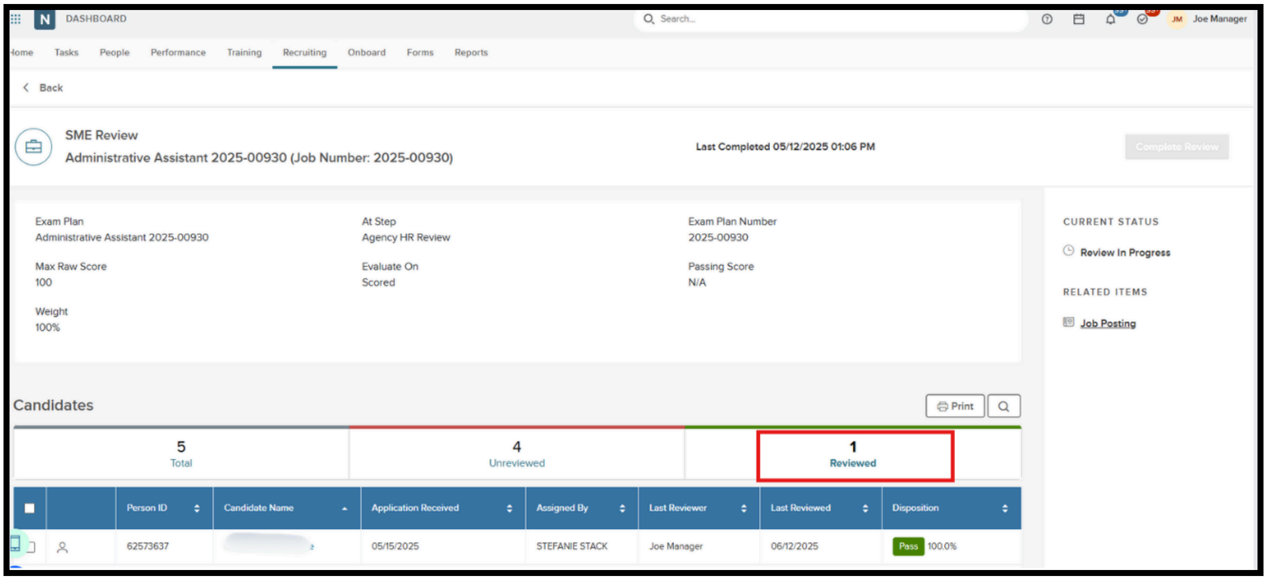
You will now see the Candidate dashboard has changed after submitting the score.



Once all candidates are reviewed and you have selected **Complete Review,** To see an applicant after this, click on View All in the Tasks section. Select Completed and then the task title to view previously scored applications.



The previously scored applications will be shown in the Reviewed column.



Attracting Applicants

The **Attract** module of NEOGOV is available to HR staff to support your recruitment needs. This tool is designed to streamline hiring efforts and connect with top talent. Here's how Attract can assist:

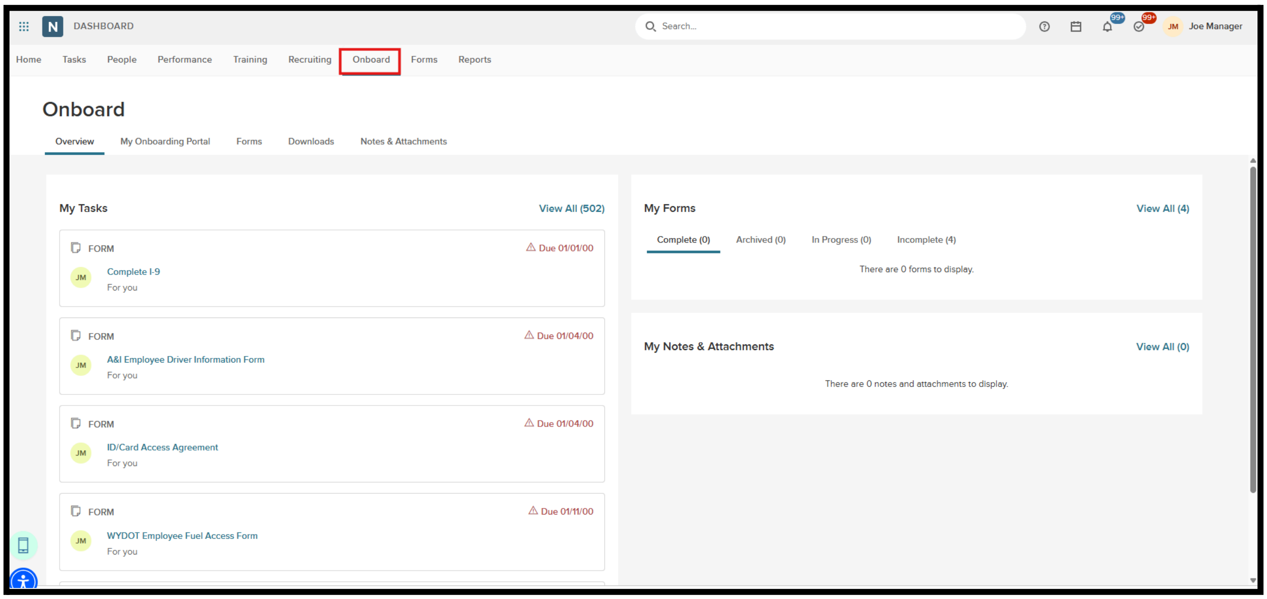
- **Job Posting Optimization**: HR can create engaging and effective job postings tailored to your needs.
- **Targeted Advertising**: Reach the right audience through advanced targeting options to maximize visibility.
- **Career Site Integration**: Enhance career pages with customizable templates that showcase your agency's benefits and culture.
- **Analytics and Insights**: Access valuable data to refine recruitment strategies and improve hiring outcomes.

If you need recruitment assistance, HR is here to help!

Onboard

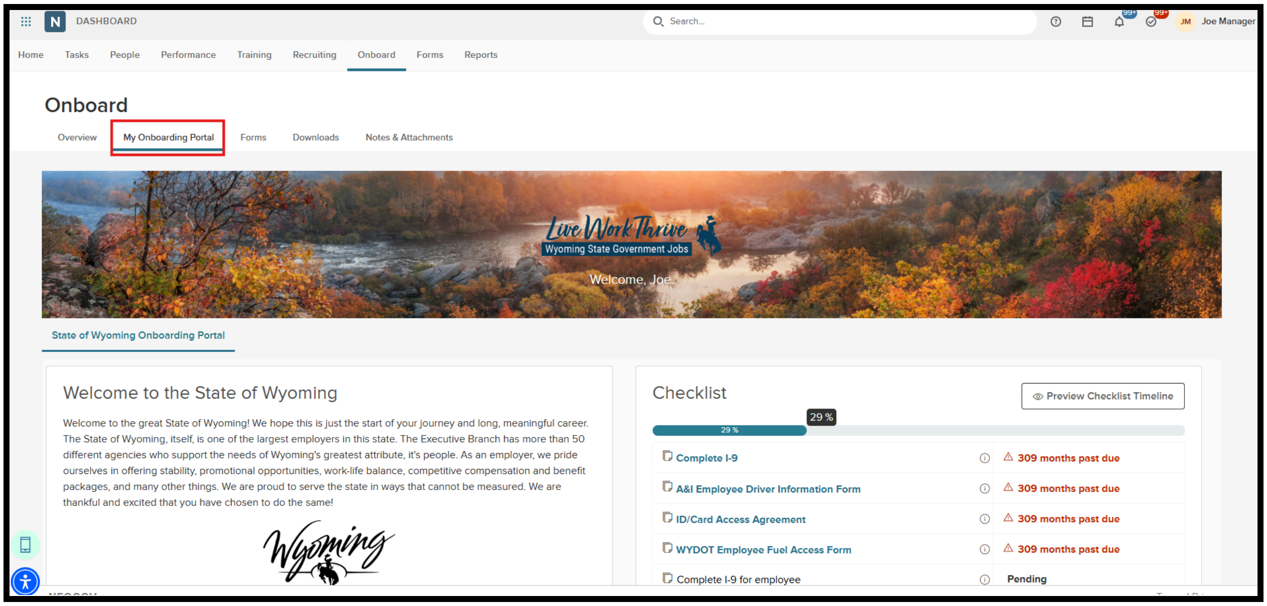
Overview

Once a new employee is set up by HR, you will be able to access the Onboard **Overview** page by clicking on **Onboard** on the left-hand menu. The Overview page will give quick access to tasks that need to be completed, forms that are completed or in progress, and any other attachments that have been added to your profile.



Portals

Selecting **My Onboarding Portal** will take you to the main State of Wyoming Onboarding Portal. Here you will find a welcome message, useful information for new employees, as well as a list of checklist items. The checklist will include the same tasks on the My Tasks list on the Overview page. Employees can access portals for up to one year from their date of hire.

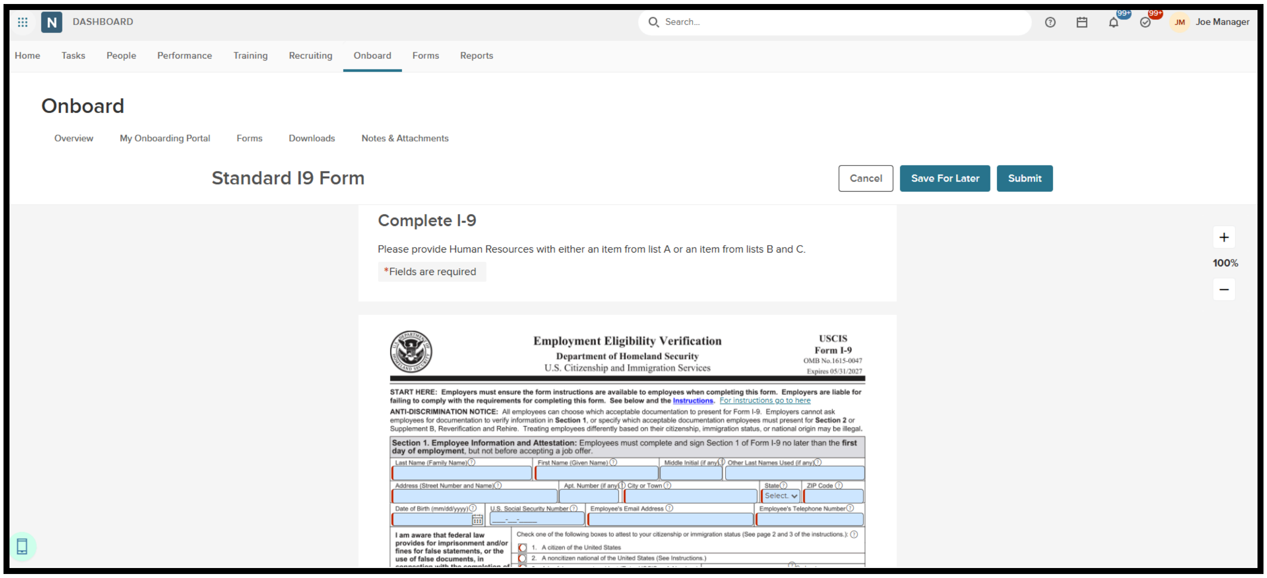


Some agencies will have their own onboarding portal, which can be accessed here as well.

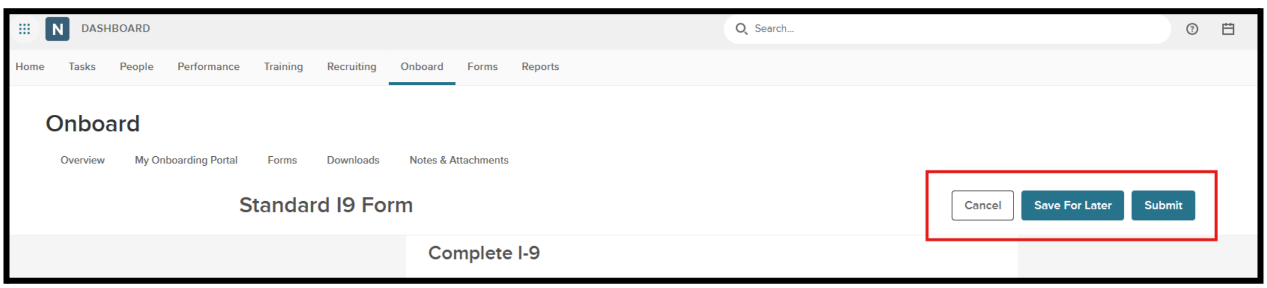
Checklists

The Checklist items will include all tasks that need to be completed to fully onboard an employee. These items will have different due dates, based on the employee's hire date. The Checklist progress bar will track an employee's overall progress. Supervisors will have tasks related to their new hires. Onboarding tasks for direct reports will be listed and accessible from the Unified Dashboard as well.

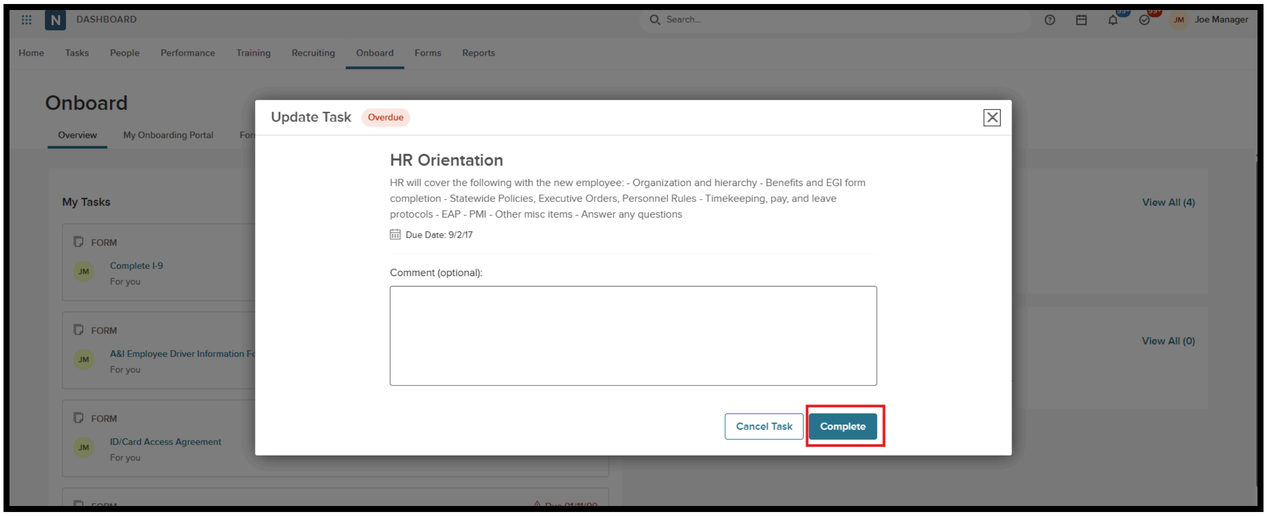
To complete a task, simply click on the task that needs to be completed. Form fields that are required will be marked with a red asterisk.



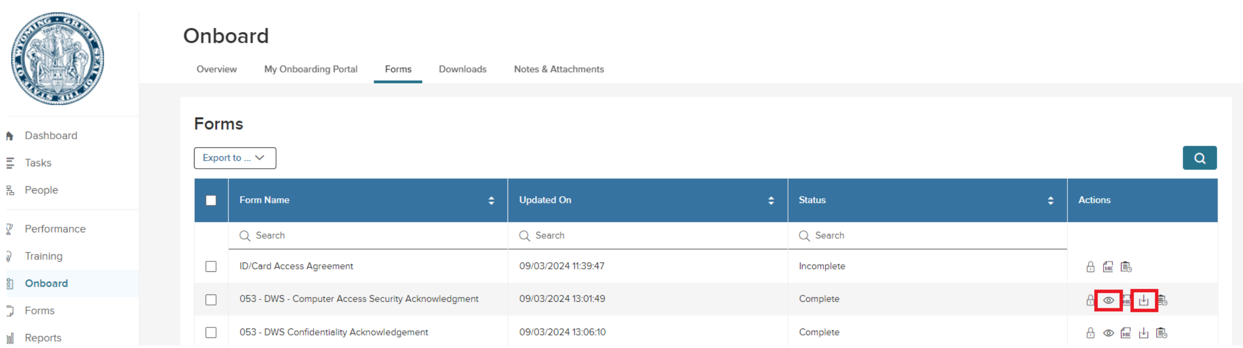
Once a form has been completed, scroll back to the top and click **Submit**. Partially completed forms can also be saved for later. Some forms will have the option to **Skip** if it is not relevant to you.



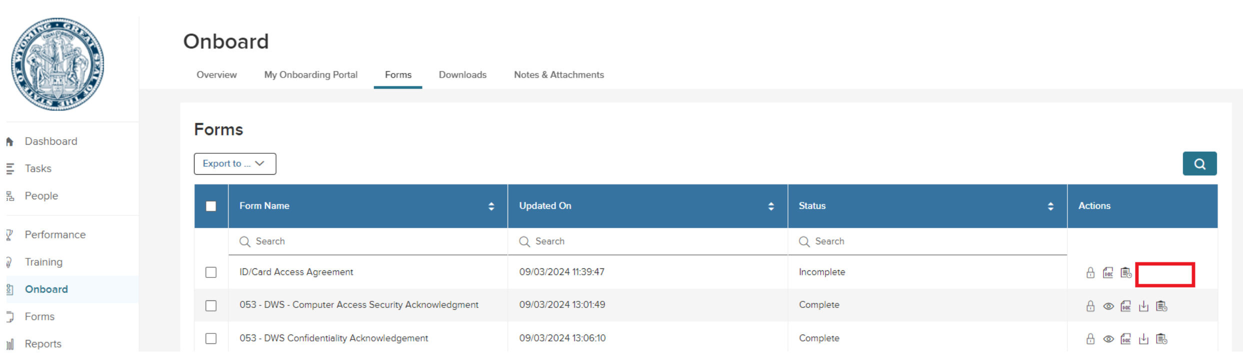
Some tasks will not have a form attached to them. For example, hiring managers are required to complete New Employee Orientation. This will show as a task in their task list. Clicking on the task will open a description of the task. Once the task is completed, simply click **Complete**.



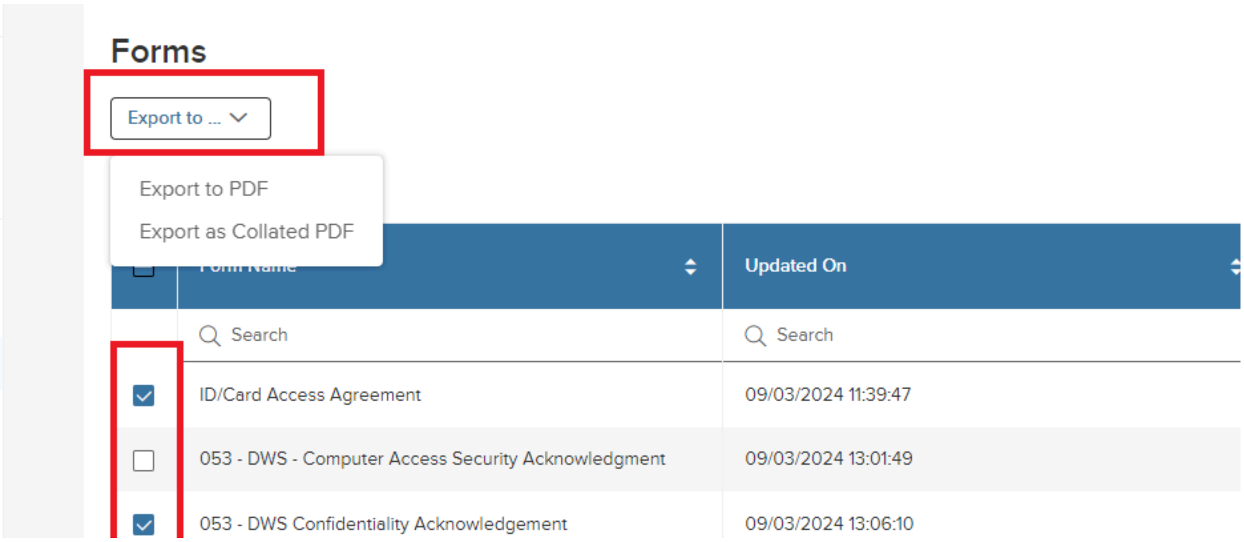
Forms can be accessed either from the **Overview** tab or the **Forms** tab. From the Overview tab, clicking on any form will open a copy of the form in a new window. From the Forms tab, use the icons on the right to **view** or **download** any form.



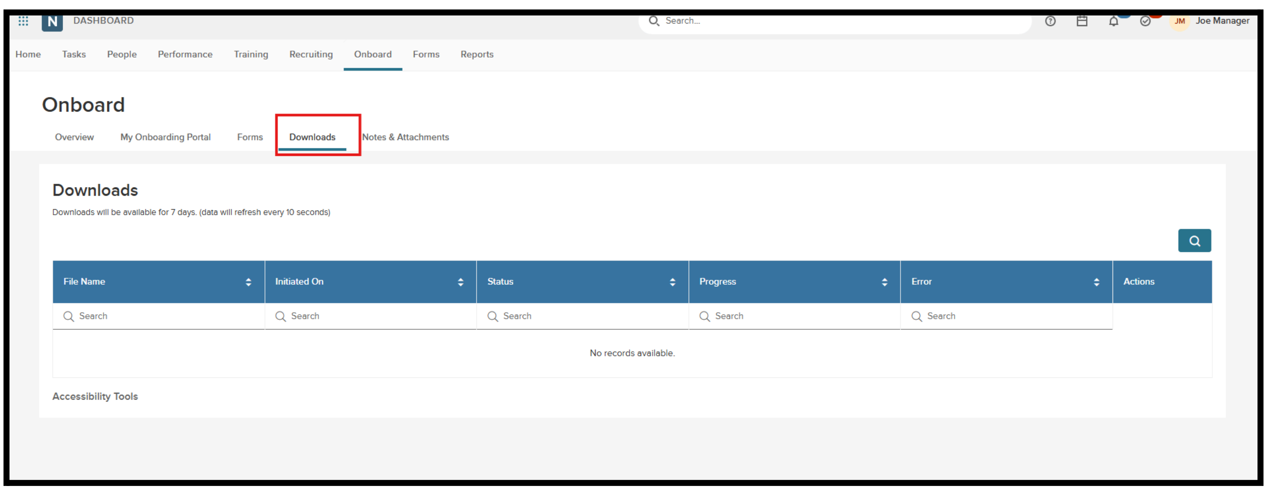
Employees and supervisors may not have permission to view all form types. In these cases, the View and Download icons will not appear.



Multiple forms can be exported at once using the **Export To** feature. Select the checkbox next to all of the forms that you wish to export, then click Export To. You can choose to export to PDF or to Collated PDF to have all of the forms appear in one document.



Once a form has been downloaded, it will appear in the **Downloads** tab for seven days.



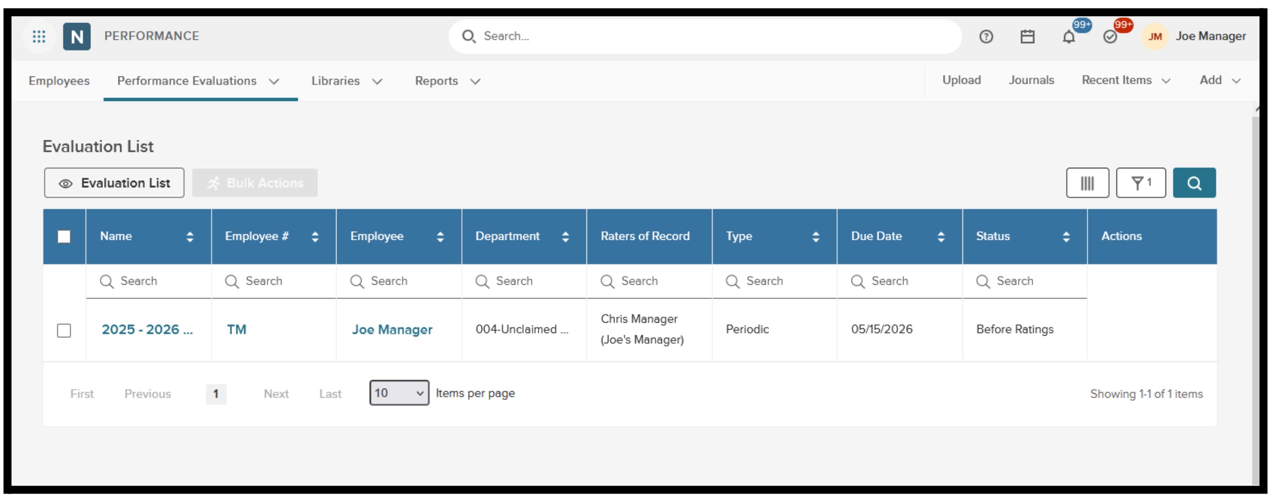
Perform

Perform is the module utilized for performance evaluations. The evaluation program consists of steps and tasks. The module also includes journal entries and employee profiles.

Navigating Perform

From the unified dashboard tasks for Performance will be visible on the front page. If they are not immediately visible, click *view all.* For more information regarding navigating the dashboard, go to the Neogov Dashboard section of the manual.

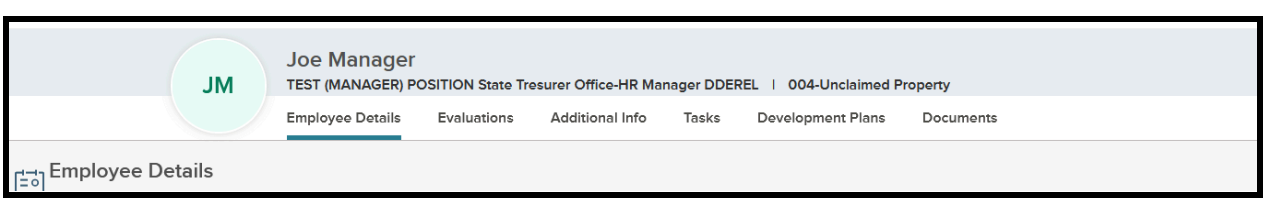
To get to the Perform module, click on *Performance* in the dashboard. From there scroll down to the *Perform Links* section and click *Performance Evaluation List*. This will go to a page that looks like this:



The top right of the page will have navigation tools for uploading a document to your profile, navigating to the journal hub, creating a journal entry or task, and recent items.

Employee Profile

At the top right corner is the user's name. When selected, the options for *My Profile, Change Password,* and *Sign out* appear. Select *My Profile* to navigate to the user profile.



Here, employees have the option to add information on work history, education, skills, certificates, licenses, supplemental info, languages and an “about me.”

The page also includes employee evaluations. Employees can view current and previously completed evaluations from this page.

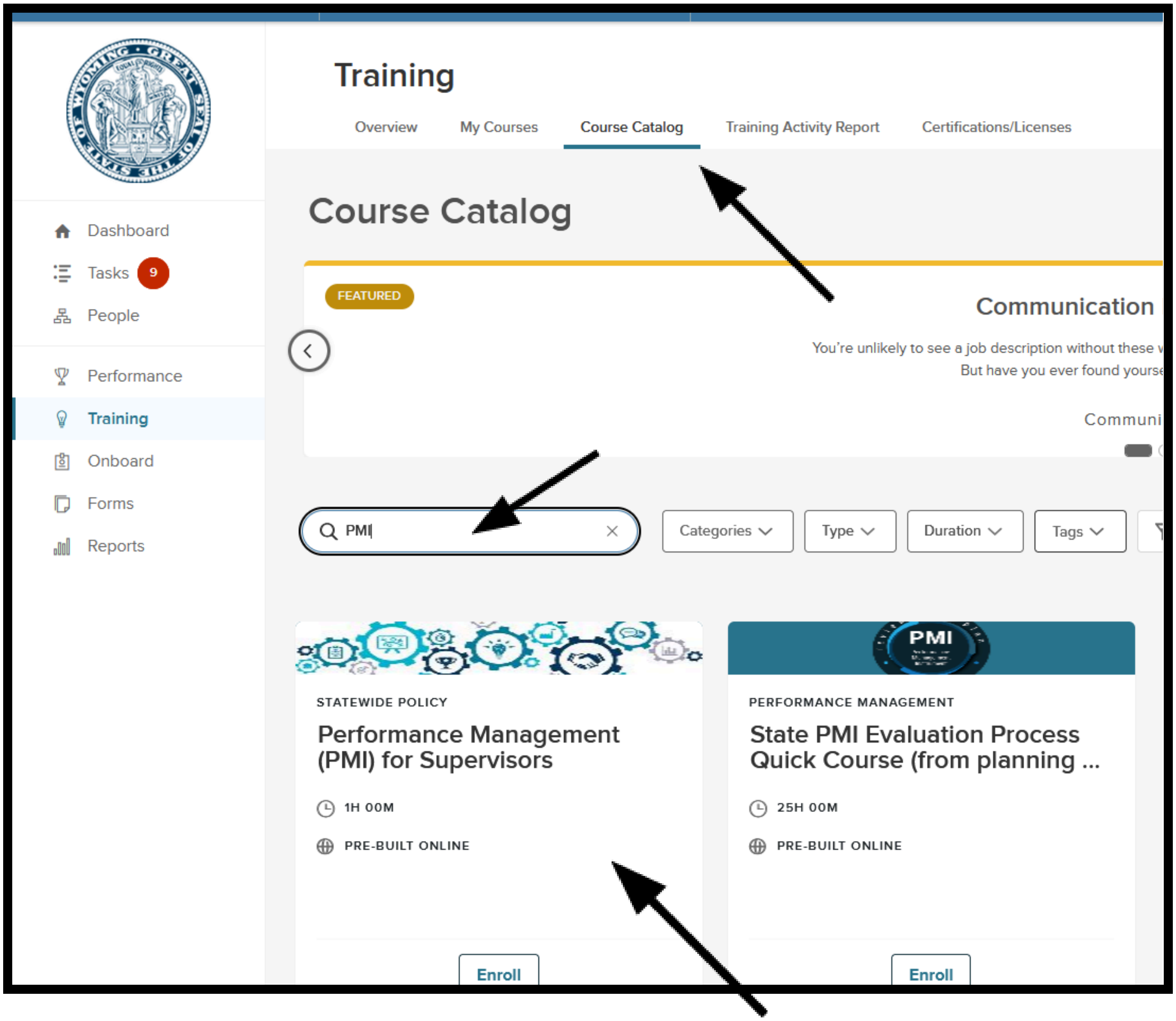
Tasks are also visible from the employee profile. They can be edited here by clicking on the edit action button. For more information on tasks, visit the Perform Tasks section.

If an employee has a development plan, it can also be accessed on the profile.

Finally, any uploaded documents can be accessed by clicking the Documents section on the profile. Here employees can view or upload documents.

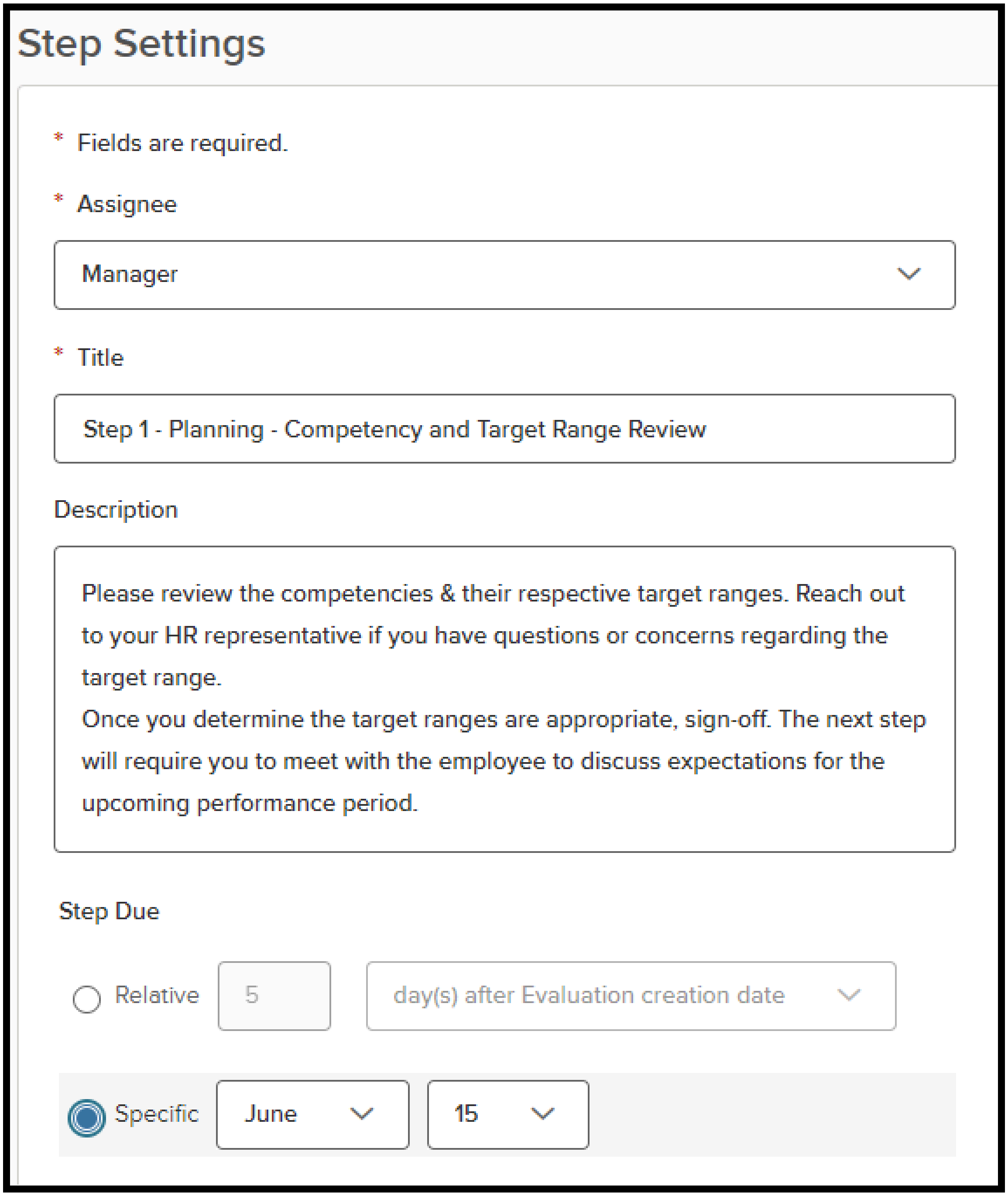
Evaluation Process

To review the evaluation process, go to *Training* on your unified dashboard. Go to the *Course Catalog*, search for PMI and enroll in the course, *State PMI Evaluation Process Quick Course (from planning to evaluation).*



Steps

Each step in an evaluation process includes multiple components:



Assignee: The employee, supervisor, or HR Representative the task is assigned to.

Title: The title of the step. This will show up on a notification email to the assignee.

Description: The description of the step. This will show up on a notification email to the assignee.

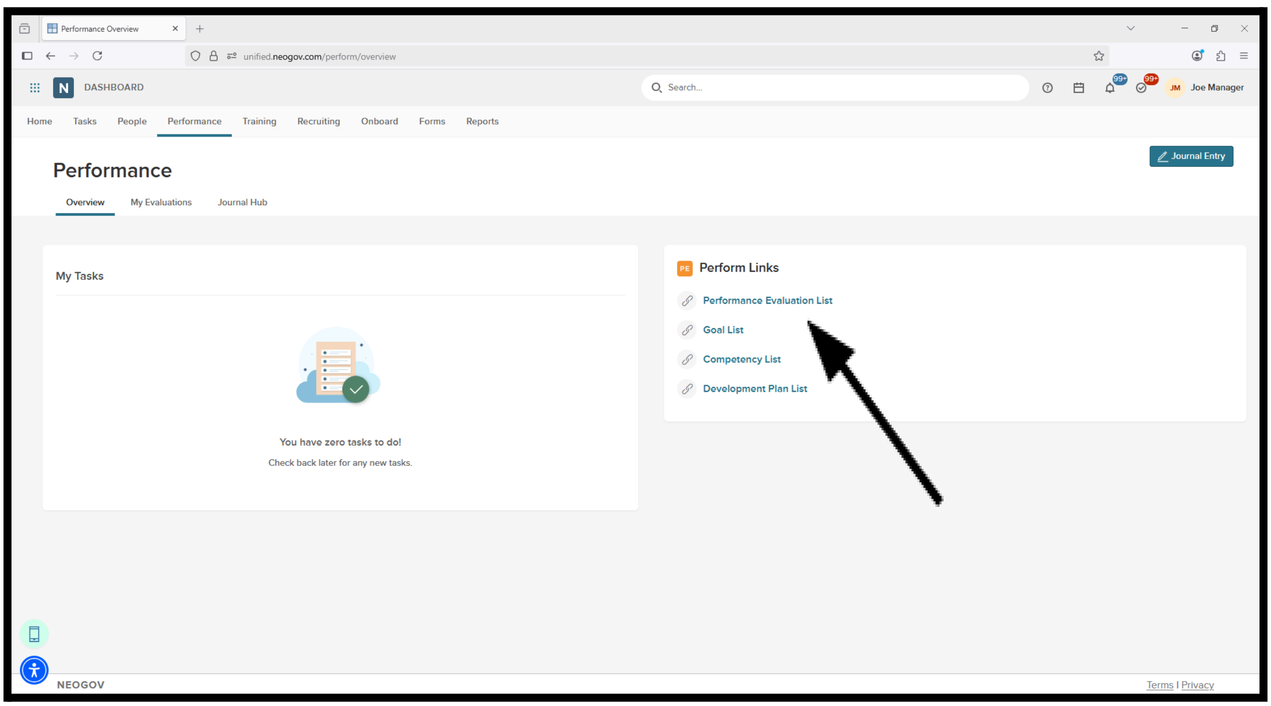
Due Date: The date a task is due. While tasks may be overdue, all tasks have a final due date of the end of the evaluation (May 15th).

Task: The task of a step is what must be completed. This could be reviewing target ranges, signatures, or approvals. Most tasks have a space for comments to be added by the task assignee.

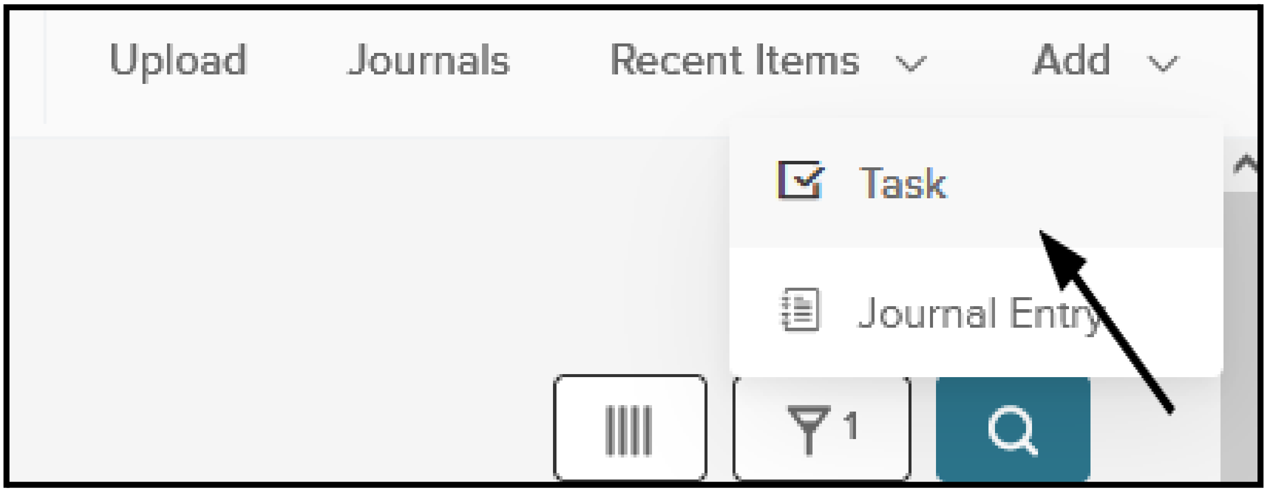
Tasks

Tasks are available in the steps of an evaluation. There is also the option to utilize tasks within the system outside of the evaluation program. Tasks can be a great way to track or manage work as supervisors or employees. Supervisors can submit tasks to employees on specific jobs or duties they would like completed within a defined time period. Employees can also self-assign tasks to help keep track of their own work.

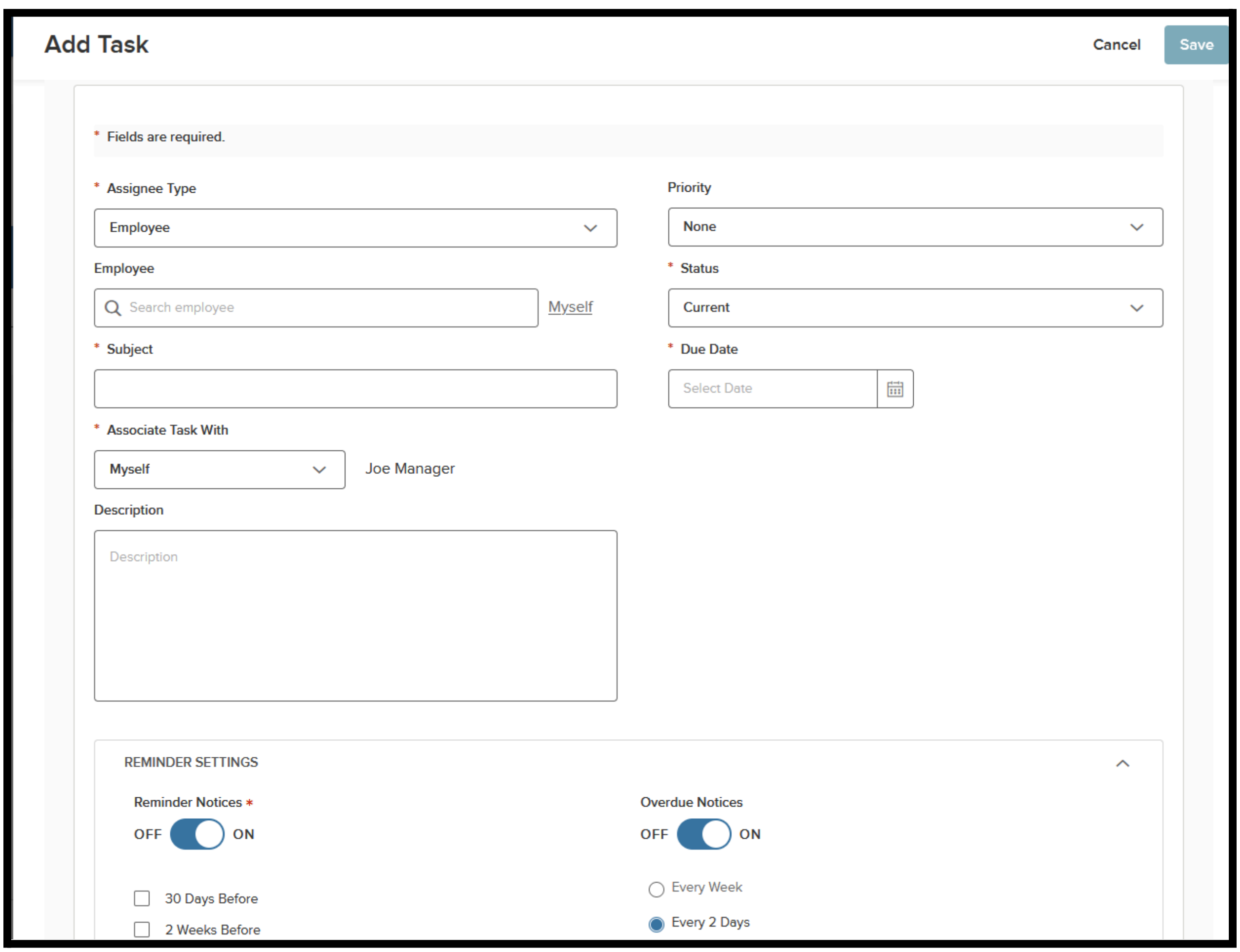
To create a task, the employee/supervisor must be in the perform module, not the unified dashboard. This is most easily accessed through clicking Performance on the top tab, and utilizing the performance link *Performance Evaluation List.*



At the top right of the page there will be an “add” button. Click there and choose “Task”



Once that is selected, the task can be created:

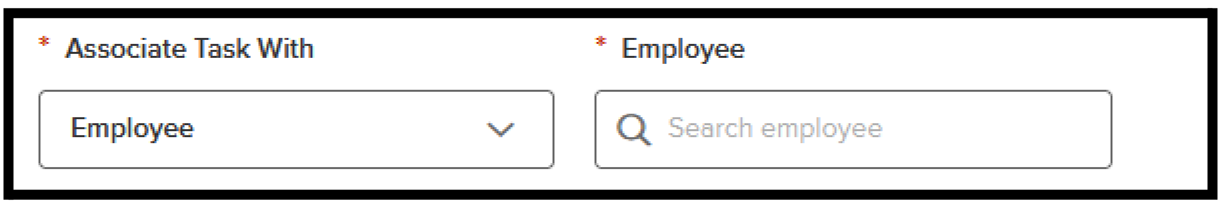


Assignee Type: This will remain *Employee*

> **Employee:** Tasks can be assigned to an employee by typing in an employee's name, or self by clicking *myself*. Tasks can only be assigned to employees under the task creator's hierarchy.

Subject: The title of the task. This will be what shows up on the dashboard and task notification

Associate Task With: This gives permissions of the task to someone. Supervisors should keep it as *myself* if they would like to remain informed of task completion. If the task should be monitored by someone else, clicking the dropdown and selecting *employee* will allow for an employee to be chosen. The association can only be assigned to employees under the task creator's hierarchy.



Description: Include a description of the task if necessary. This will show up when the task is clicked on as well as the task notification.

Priority: Setting a priority will help in maintaining workflow for employees or self. The priority can be none, low, medium, or high.

Status: The status of a task. When created it should be current. If it needs changed, the task associator or assignee can change it to completed, canceled, pending, or skipped. These changes can only be made from the Perform module in the employee profile, not the dashboard.

Due Date: The due date of a task. This can be adjusted after the task is assigned.

Reminder Settings: These can be tailored to each specific task per the task creator's discretion.

Journal Entries

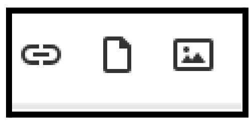
Journal entries are a feedback vehicle for employee performance. They can include notes or attachments that can be utilized during the evaluation or just remain on the employee profile. For the training video regarding Journal entries, click here.

Creating a journal entry

There are five ways to create a journal entry

1. In the perform module, click on the “journal hub” at the top right corner.

From there you can click *Write a new journal entry*. Type and select the employee’s name you wish to write an entry for. Once selected, the journal entry will be available to type notes or add attachments. Attachments can include a link, document, or image by clicking the appropriate tool listed below, respectively:



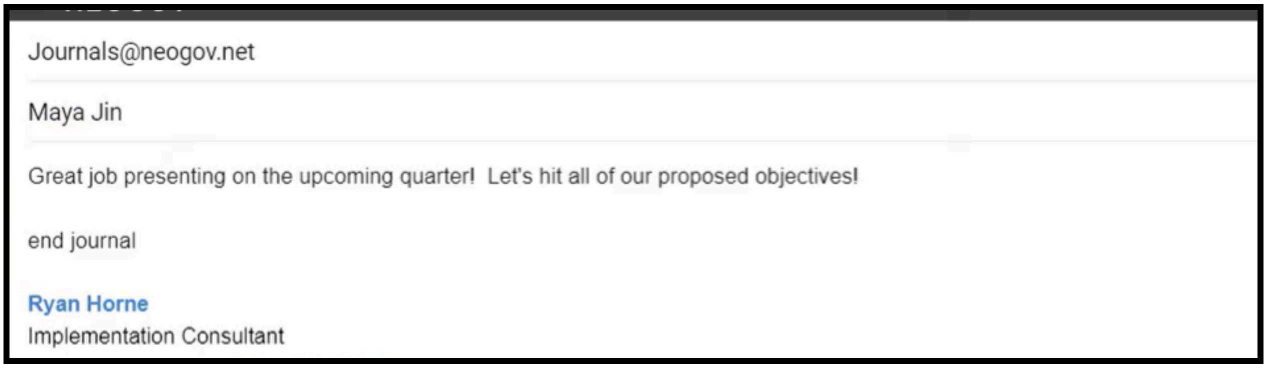
When the journal entry is complete, select who the entry should be shared with. This can be the employee, manager, and/or manager’s manager. Once the sharing settings are selected, click *Submit Journal Entry* to complete the entry.

2. Go the the employees profile page and click on the *Journal Entries* icon in the top right

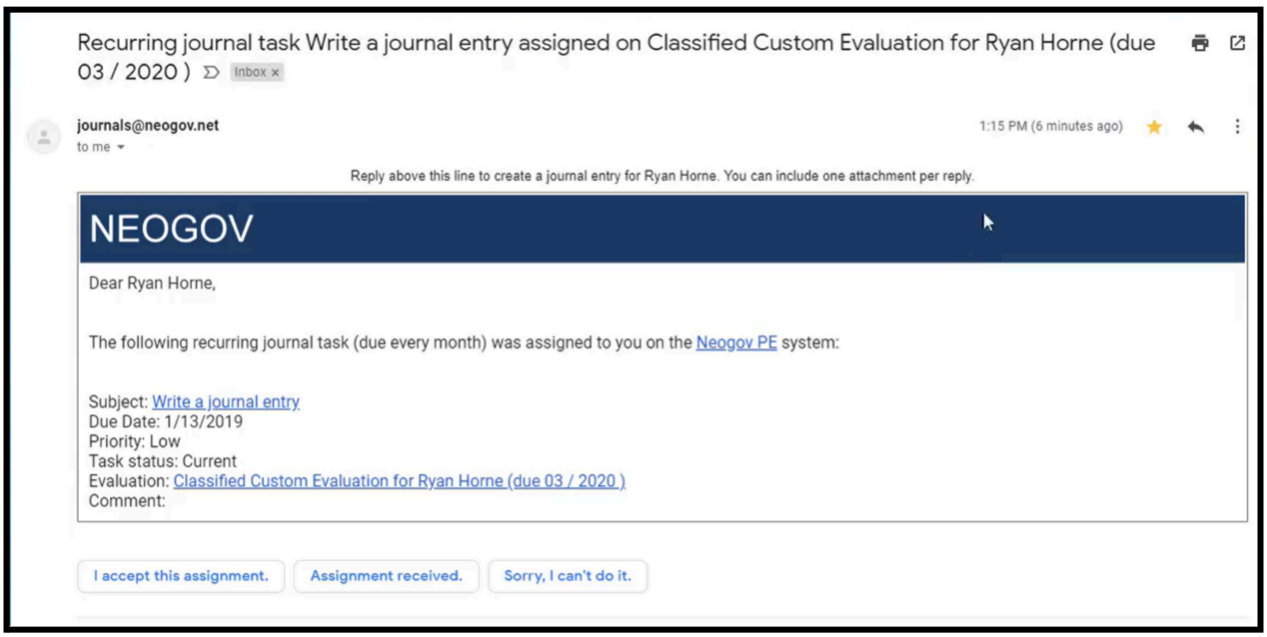
Follow the same procedure as step 1 to complete a journal entry.

3. Send an email to journals@neogov.net. The subject line should be the employee’s name as it is in Neogov ONLY. Type the journal entry in the body of the email, and put “end journal” at the end. Attachments can be included as well, just as a normal email attachment.

Please note: The email address the journal is being sent *from* must match the email address in Neogov. If an employee is unsure what email address is in Neogov, they should reach out to their HR Representative.



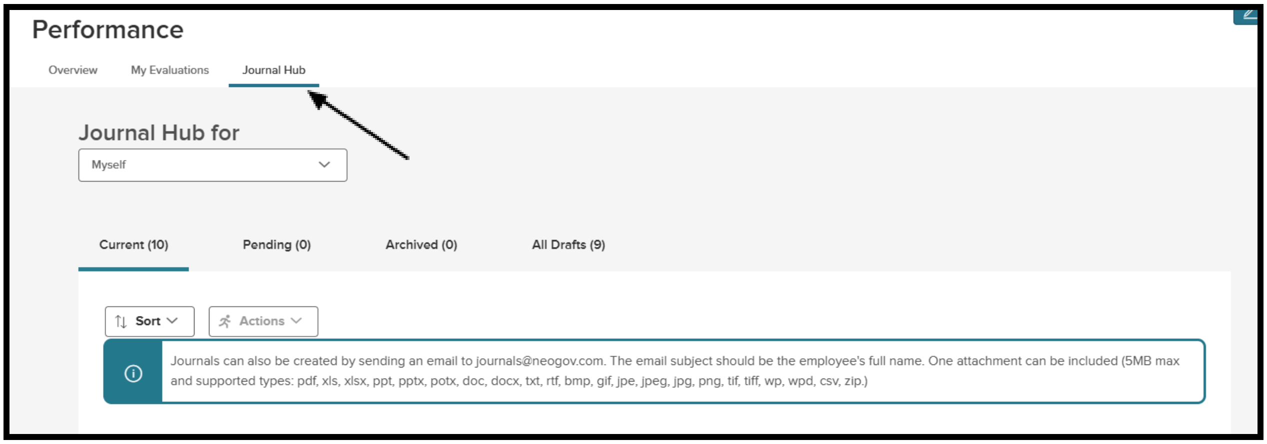
4. Respond to a task email requesting a journal entry. Simply reply to the email and follow the steps outlined in step 3.



5. ***Managers only* - **From the dashboard click on the *People* tab on the left. Under your team, select the *action* dropdown and select *Write a journal entry.* Follow the procedure from step 1 to complete the journal entry.

Finding Journal Entries

To find a journal entry go to the dashboard and click “Performance” on the left tab. From there click “Journal Hub” in the top tabs.



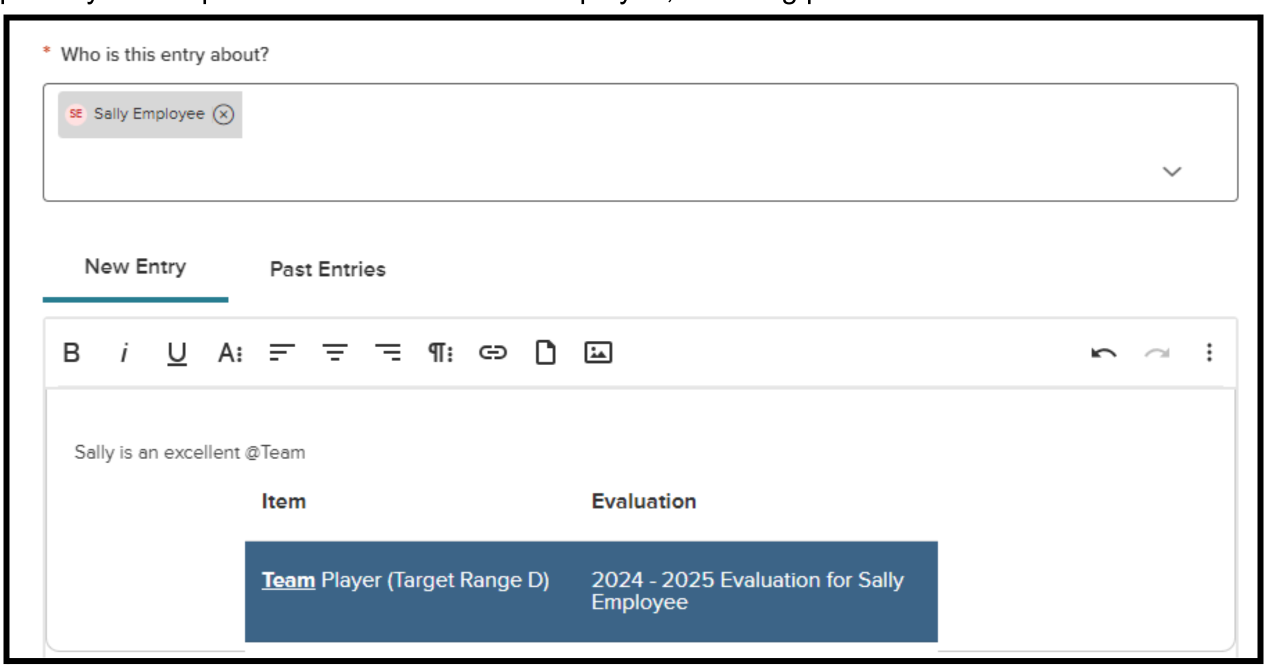
Then, in the box below “Journal Hub for”, type in the employee you wish to review journal entries for. It is limited to your hierarchy or if the journal entry was shared with you.

To view your own journal entries, scroll down to the “Current” journal entry tab below “Journal Hub for.” Here your journal entries are available to review.

To view any Pending, Archived, or Draft journal entries, click on the appropriate tab.

Tagging Competencies

To tag a competency in the journal entry, type **@** and type in the competency you wish to include. Make sure the competency is the correct target range for the employee. The system will pull any/all competencies attributed to an employee, including previous evaluations.



Development Plans

Performance Improvement Plans

- The Performance Improvement Plan (PIP) is utilized to help employees who receive an overall “Unsatisfactory” score in their evaluation. The process works as such:
  - Supervisors add tasks related to the unsatisfactory performance competencies for the employee to work on
  - The employee and supervisor meet to discuss expectations of the PIP
  - The employee completes tasks and checks-in with the supervisor regularly throughout the PIP period
  - After tasks are completed, or the 60 day requirement is met, the supervisor evaluates the overall progress made with either “Satisfactory” or "Unsatisfactory," and includes a comment to support their evaluation of the employee’s PIP
  - The employee signs off on the PIP and is able to leave a comment if they desire. Then the PIP is completed.

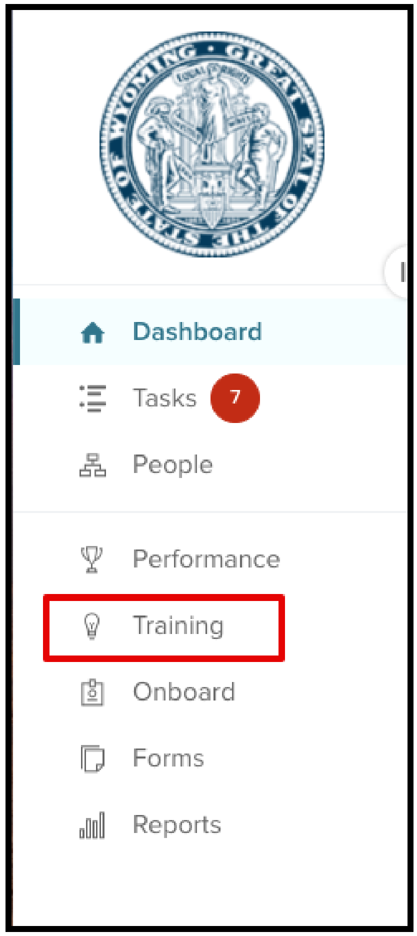
Perform FAQ/Tips and Tricks

- If you have any questions regarding your PMI, Perform, or Neogov in general, please reach out to your HR representative.
- Password issues
  - If you have difficulty logging in using a traditional login (username and password), click on the “Forgot your username or password” link below the login area.
  - If you do not receive a password reset email, check with HR to ensure your state email address is accurate in your Neogov account.
  - If your email is correct, request HR to send you a password reset email.
  - If none of the above methods work for access, please submit a Neogov Help Ticket.
- Position changes (for example, a reclassification or employee transfer) will require an updated evaluation starting from step 1. This ensures proper expectations are set for each employee.
- If you have any errors or issues with the system, please fill out a Neogov Help Ticket and provide screenshots if possible.
  - Screenshots can expedite resolution to any issues, especially when it requires assistance from Neogov’s engineer teams.
- **Supervisors Only** - Do not complete ratings/evaluations for termed employees.
  - Especially with a 0 score. This disrupts reporting, particularly reports based on division and agency scores.

    - When an employee terms, wait for that employee to be pulled out with the weekly term process.
- Coming Soon: Writing Assistants!

Learn

When logging into Neogov, you will automatically land on the Dashboard. The Dashboard shows all tasks you need to complete across NEOGOV. To go to your training-specific page, click **Training** in the menu on the left.



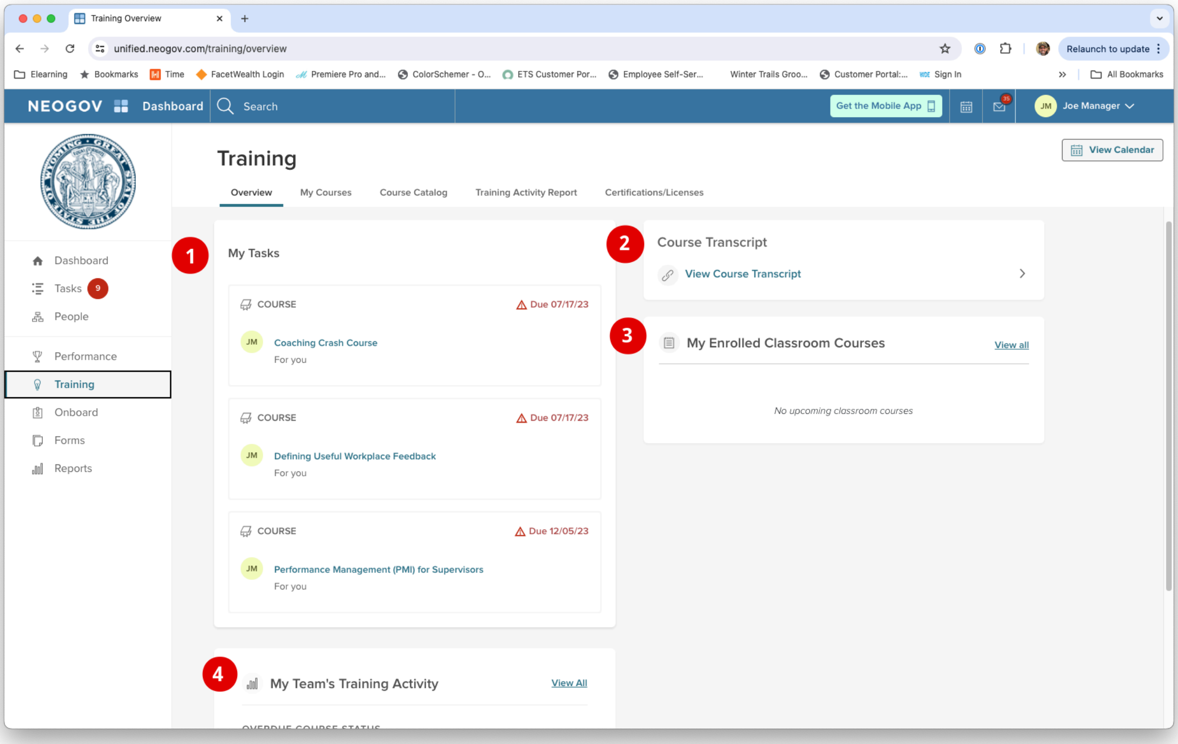
Training Navigation

If you're in any other area of the system, you can navigate to the **Dashboard** by selecting **Dashboard** from the menu bar located at the top of the page.

Dashboard Button

Training Overview

The Training **Overview** page gives details of the employee's enrolled courses. It also displays extra information for managers to have oversight into their team's courses.



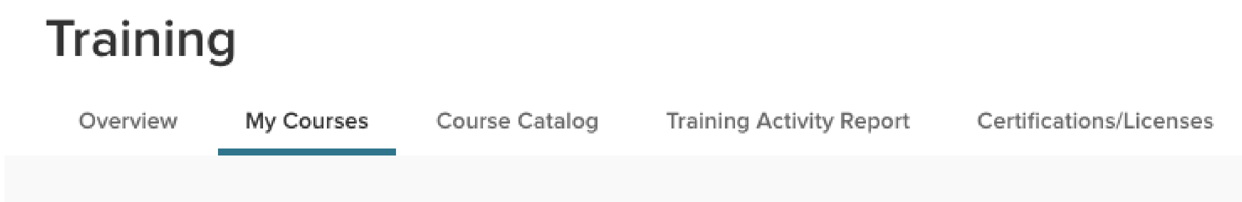
Training Overview Page

1. **My Tasks**: Access all training-related tasks like courses and approving course enrollments
2. **Course Transcript**: View/print your course transcript (for more information see page 20)
3. **My Enrolled Classroom Courses**:
    a. View upcoming classroom classes you're enrolled in to ensure you never miss an important class Select the title of a listed class to be directed to the Class Details Page
4. **My Team's Training Activity**: View a summary of your team's In Progress and Not Started courses

My Courses

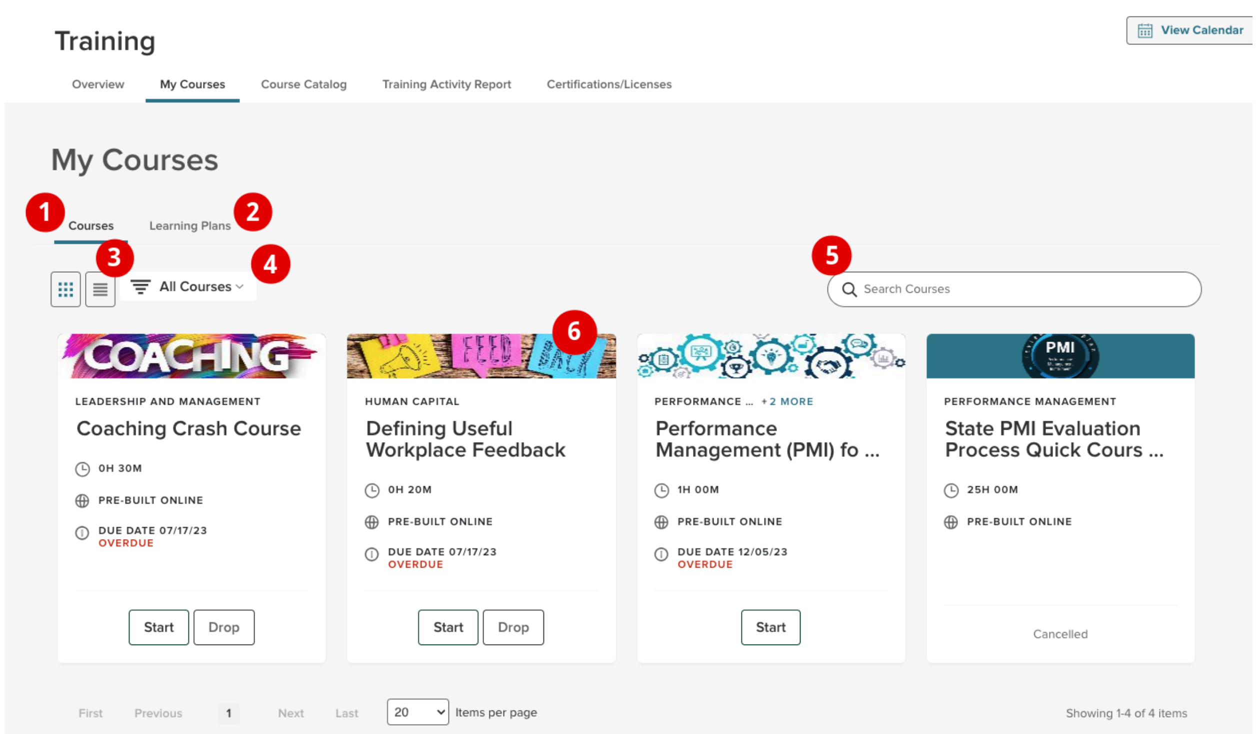
The next section is **My Courses**. This is where you can see all the courses associated with your account. Here, all courses are displayed as course cards in a grid format that makes it easy to see everything at once. You can use this page to filter, organize and get a quick overview of your courses.

To navigate to the **My Courses** page, select **My Courses** from the menu bar located at the top of the **Training** page.



My Courses

From here, you can see all courses that are in progress, completed, requiring approval, pending, not started, or canceled.

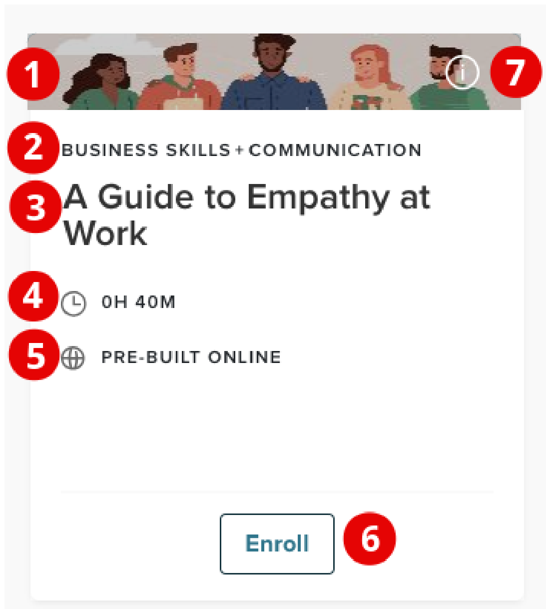


My Courses Page

1. **Courses**: View all in progress and completed courses
2. **Learning Plans**: View all in progress and completed Learning Plans
3. **View Type**: Select between the card view (displayed) or table view
4. **Filters**: Change the view of the course cards by specific parameters
    a. View by: All Courses, Current or Pending, Completed, or Not Completed
    b. Current Filters from table view: Course Name, Delivery Method, Type, Enrolled Date, Progress, Due Date
5. **Search for Courses**: Use the type field to search by course title

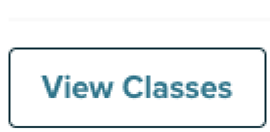
6. **Course Cards**: A graphic display of the important details of a particular course

Course Card Details



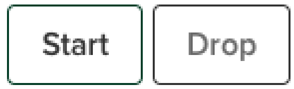
Course Card Features

1. **Header**: A visual representation of the course
    a. Includes a red Required label if the course is required, helping you stay compliant
2. **Course Category**: Specifies what category the course belongs to
3. **Course Name**: The title of the course
    a. Click on the course for the full title (see Course Detail Page)
4. **Duration**: How long the course takes to complete
5. **Type of Course**: Whether the course is a Pre-Built Online, Custom Online, or a Classroom Course
6. **Course Actions**: Available options to interact with this course
    a. Options include: Enroll, Start, Drop, Resume, or View Classes (for upcoming Classroom Courses only)



View Classes Button for Classroom Courses

b. A **Drop** option is available to allow users to drop courses they enrolled themselves Into
    i. This permission must be enabled by NEOGOV, and does NOT allow users to drop courses their manager or HR enrolled them in



Drop Button

c. A **Check-In** option is available if configured by an Admin (for upcoming Classroom Courses only). Classroom check-in allows employees attending in person training class to be able to check-in from a mobile device or desktop, saving administrators time by removing the need to manually mark attendance from the roster.

Check-in Button

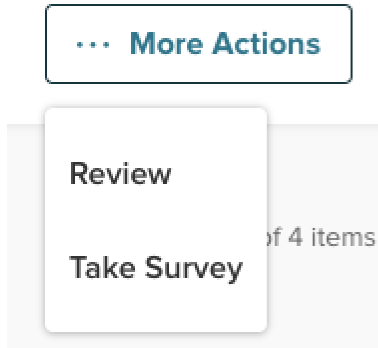
d. A **Review** button is available if an Admin has enabled the ability for users to review the course once they've finished it.

Review Button

e. A **Take Survey** button is available if an Admin has configured a survey to be assigned after the course is completed.

Take Survey Button

f. A **More Actions** button is available if there are multiple actions available



More Actions Button

g. These icons provide a straightforward way for users to take action on their courses with one click as soon as they sign in.

7. **(i) Icon**: Flip to the backside of the card for more information

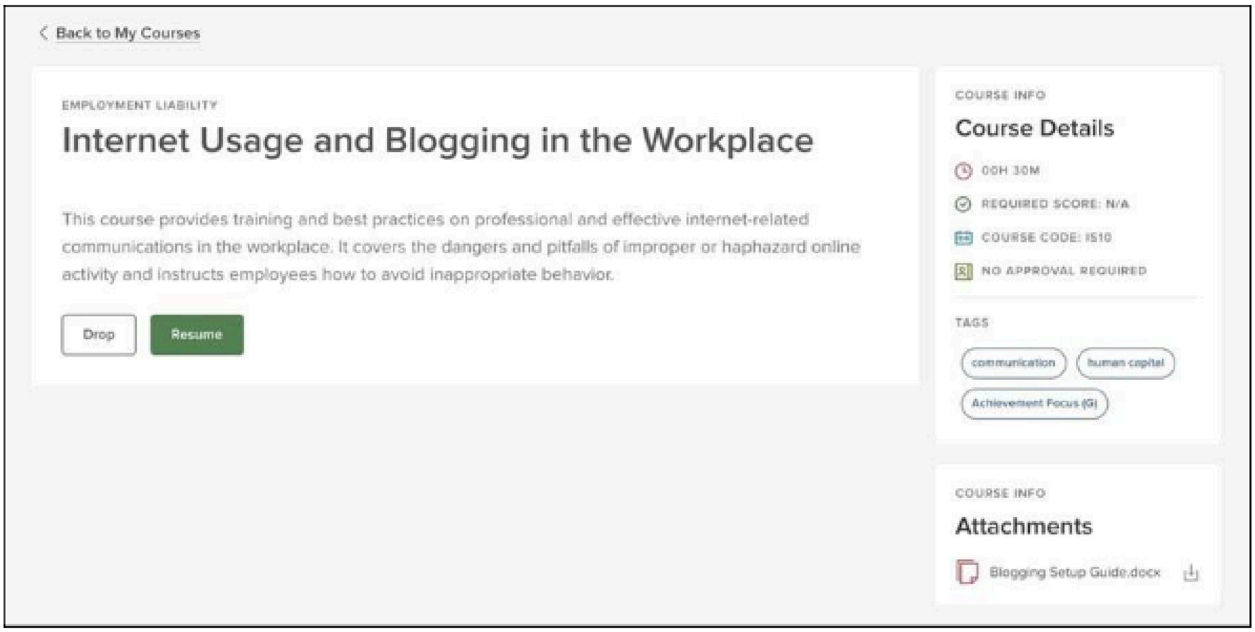
Course Card Back Information

1. **Course Code**: The code associated with the course
2. **Course Name**: The title of the course
3. **Passing Score** (If Available): The minimum score required to pass/complete the course
4. **Approval Required**: If enrollment in the course needs to be approved by another user (i.e., manager, instructor, specific employee, etc.)
5. **Description**: Brief explanation of the course
6. **(x) Icon**: Flip back to the frontside of the card

After viewing the course card, you can find even more details about the course by clicking on the course title. This brings up the **Course Details Page**.

Course Details Page

When you click on the title of a course from its course card, you pull up the **Course Detail Page**. This page displays comprehensive information about a single course. Each **Course Details Page** is broken up into smaller sections to make it easy to digest information.



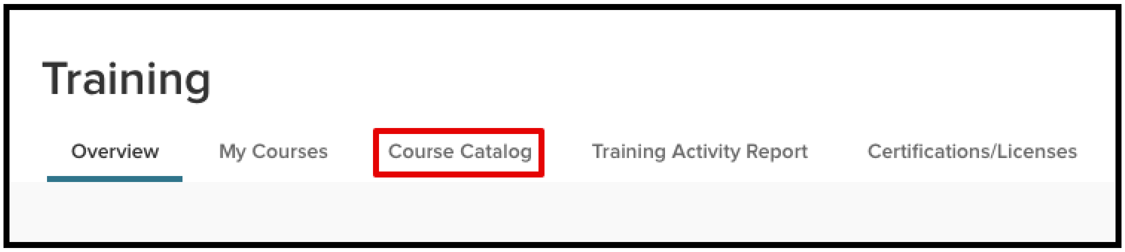
Course Details Page

Course Catalog

The next section is the **Course Catalog**, which is a larger inventory of courses in the system that are available to you. Learners may enroll into new courses from this section if permissions allow. Please note that some courses may require a manager's approval before the enrollment process is complete.

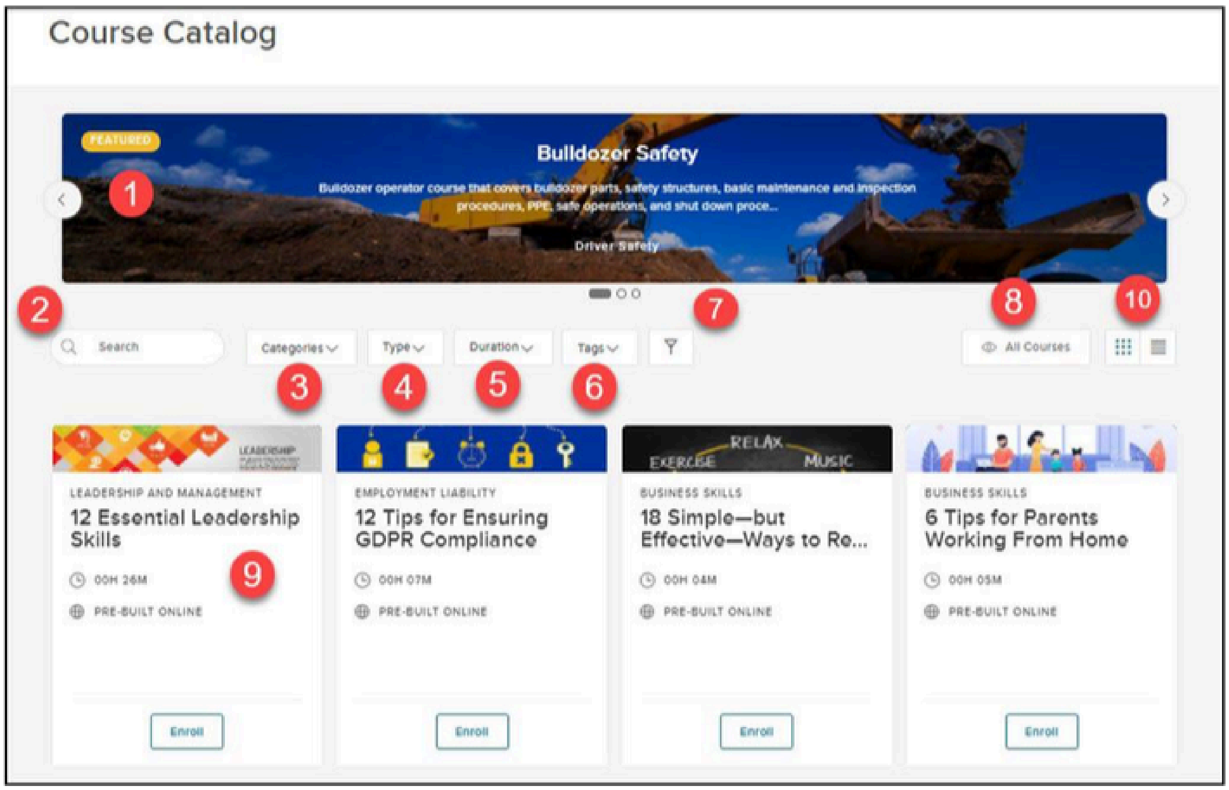
Course Catalog Overview

To navigate to the Catalog, select **Course Catalog** from the menu bar located at the top of the **Training** page.



Navigating to the Course Catalog

This page provides a number of tools to help ensure learners find their desired course(s). Each course is organized by a specific category determined by your system administrator.



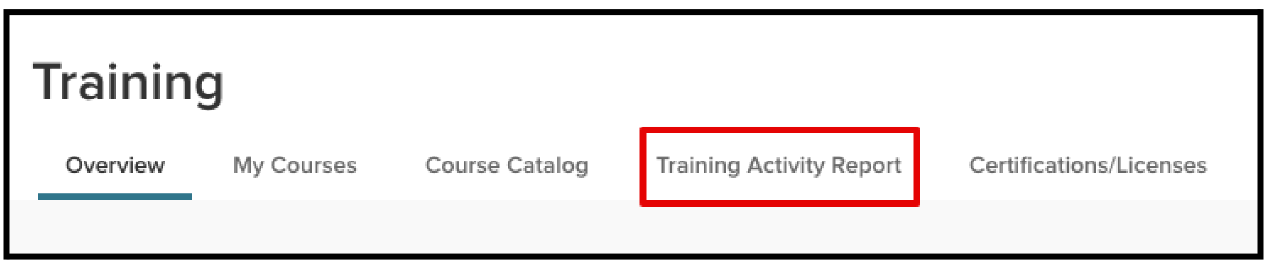
1. **Featured Courses**: Displays courses featured by Admins to promote new or upcoming courses. Select the featured course for more information or to enroll
2. **Search Bar**: Type into this bar to look for a specific course title
3. **Categories**: Narrow courses down by their associated category
4. **Type**: Narrow courses down by if they are a required course or an elective
5. **Duration**: Narrow courses down by the expected duration to complete a course
6. **Tags**: Narrow courses down by associated tags or keywords
    a. If learners are looking to improve on a specific competency, such as communication, then this is the best way to find those types of courses

7. **Filters**: Limit the course view in the Course Catalog with specific requirements
    a. Filters available include course name, course code, category, delivery method, type of course (required or not), number of classes (Classroom only), duration, last updated by, last updated on, passing score, and approval required
    b. Multiple filters can be active at once
8. **Custom Views**: Customize your grid view and save your applied filters
    a. A slide out appears. Select Create New View to save your view for later use
    b. You can also set the newly saved view as your default view
9. **Course Card**: Bite-sized information about a particular course
10. **Catalog View**: Toggle the Course Catalog view by either the default grid view or column view

All of these available filters give you the ability to find any specific course needed in the easiest and fastest way possible.

Training Activity Report

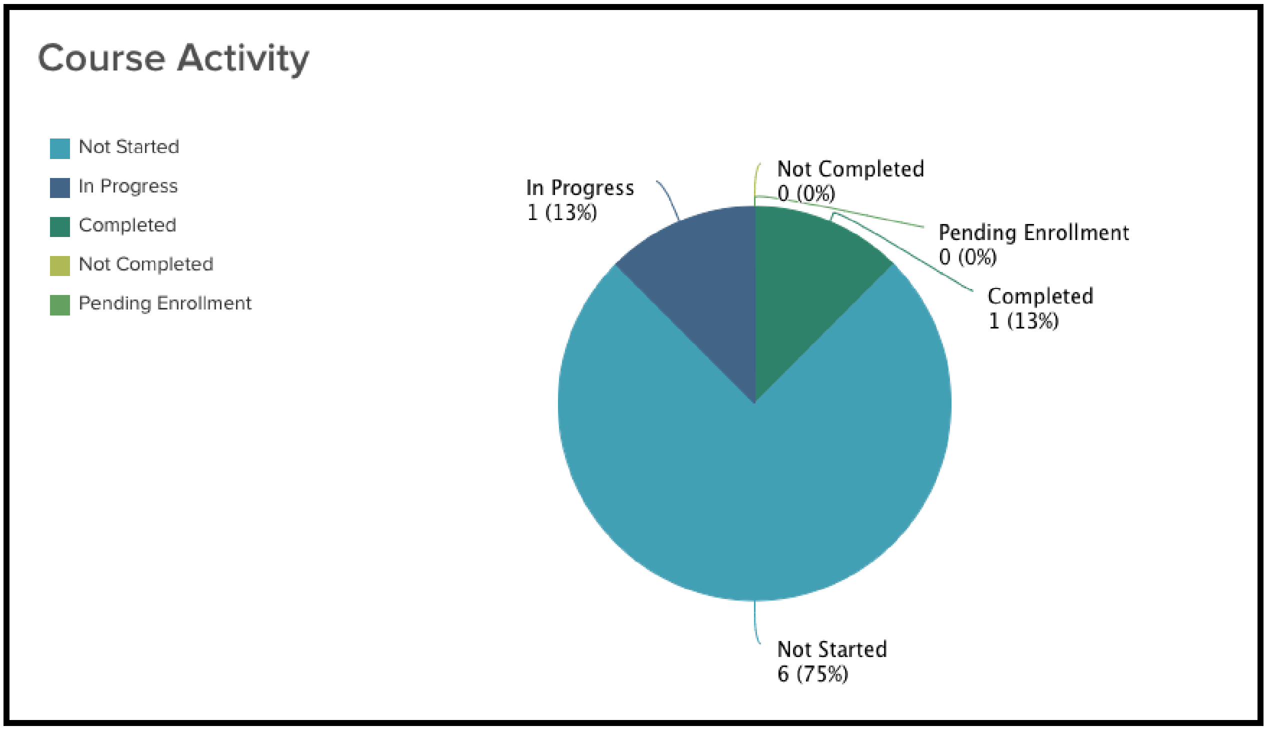
The next tab is the **Training Activity,** which can be used to track your progress on all your courses. To navigate here, select **Training Activity** from the menu bar located at the top of the **Training** page.



Navigating to Training Activity

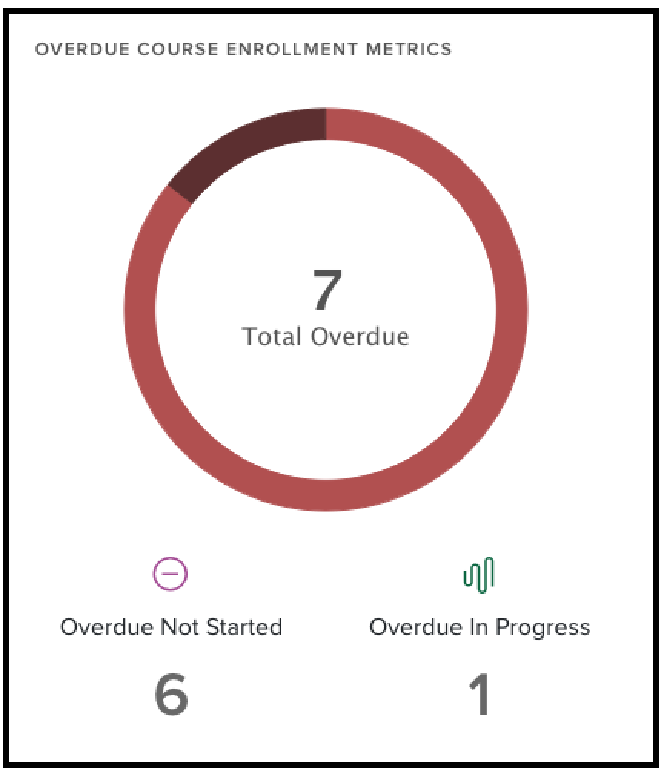
This page can be neatly divided into three sections: your **Overall Training Activity**, **Overdue Course Enrollment Metrics**, and your **Enrollment List**.

The **Overall Training Activity** section contains a pie chart that displays the total statistics for courses you are enrolled in. This shows you a detailed look at all of the courses associated with your account. Select any of the chart sections to display more information about that particular course status.



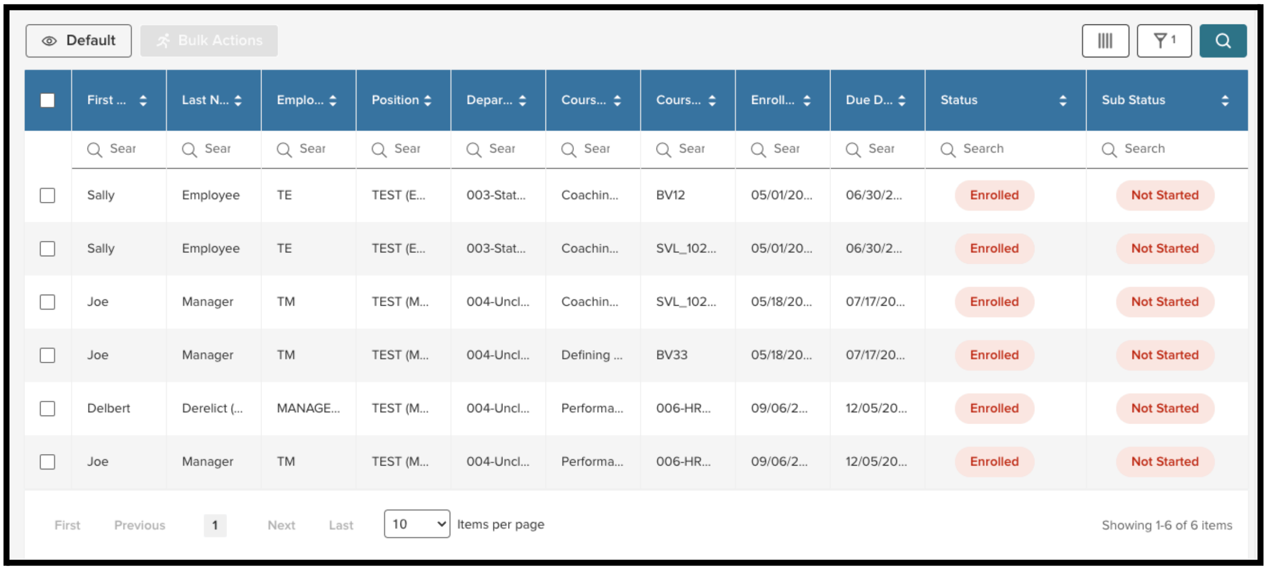
Training Activity Pie Chart

Next to **Overall Training Activity** is the **Overdue Course Enrollment Metrics**. This pie chart displays courses that have a past due date.



Overdue Course Enrollment Metrics

Beneath the above two metrics sits the **Enrollment List**. The data within this list is populated by any selected data from aforementioned pie graphs, and changes instantly with any selection. This allows learners to easily filter between associated courses in order to find the tasks that need additional work. It also allows managers to filter between employees.



Default | Bulk Actions

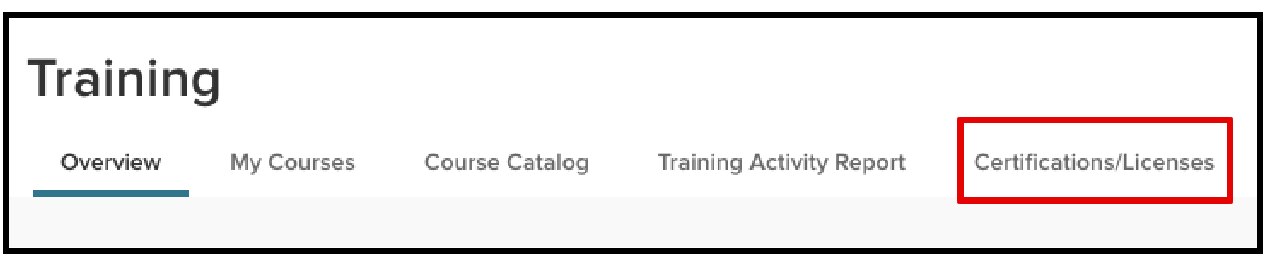
	First ...	Last N...	Emplo...	Position	Depar...	Cours...	Cours...	Enroll...	Due D...	Status	Sub Status
	Sear	Sear	Sear	Sear	Sear	Sear	Sear	Sear	Sear	Search	Search
	Sally	Employee	TE	TEST (E...	003-Stat...	Coachin...	BV12	05/01/20...	06/30/2...	Enrolled	Not Started
	Sally	Employee	TE	TEST (E...	003-Stat...	Coachin...	SVL_102...	05/01/20...	06/30/2...	Enrolled	Not Started
	Joe	Manager	TM	TEST (M...	004-Uncl...	Coachin...	SVL_102...	05/18/20...	07/17/20...	Enrolled	Not Started
	Joe	Manager	TM	TEST (M...	004-Uncl...	Defining ...	BV33	05/18/20...	07/17/20...	Enrolled	Not Started
	Delbert	Derelict (...	MANAGE...	TEST (M...	004-Uncl...	Performa...	006-HR...	09/06/2...	12/05/20...	Enrolled	Not Started
	Joe	Manager	TM	TEST (M...	004-Uncl...	Performa...	006-HR...	09/06/2...	12/05/20...	Enrolled	Not Started

First Previous 1 Next Last 10 Items per page Showing 1-6 of 6 items

Enrollment List

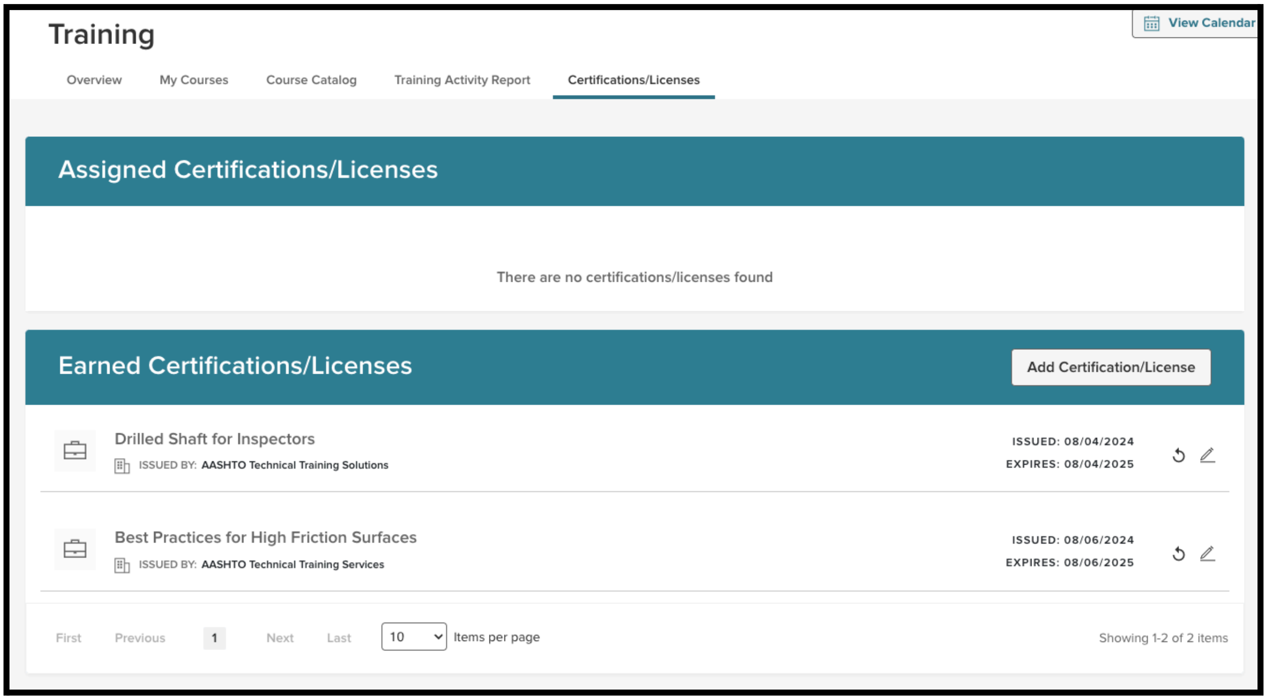
Certifications/Licenses

The next tab is the **Certifications/Licenses** area. To navigate here, select **Certifications/Licenses** from the menu bar located at the top of the training page.



Navigating to Certification/Licenses

This page shows both your assigned certifications/licenses and those that you have earned.You can add certifications and licenses that you have earned by clicking on the “**Add**” button.

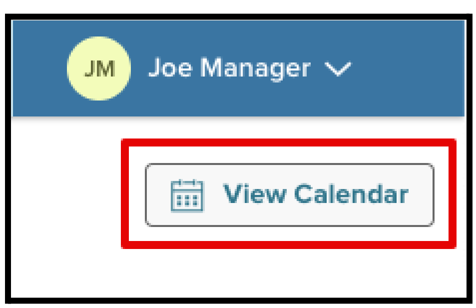


Assigned and Earned Certifications/Licenses page

Calendar

On the **Training** page and in the upper right corner is the **Calendar**, which gives you a visual view of courses you are currently enrolled in and classroom courses from the **Course Catalog**.

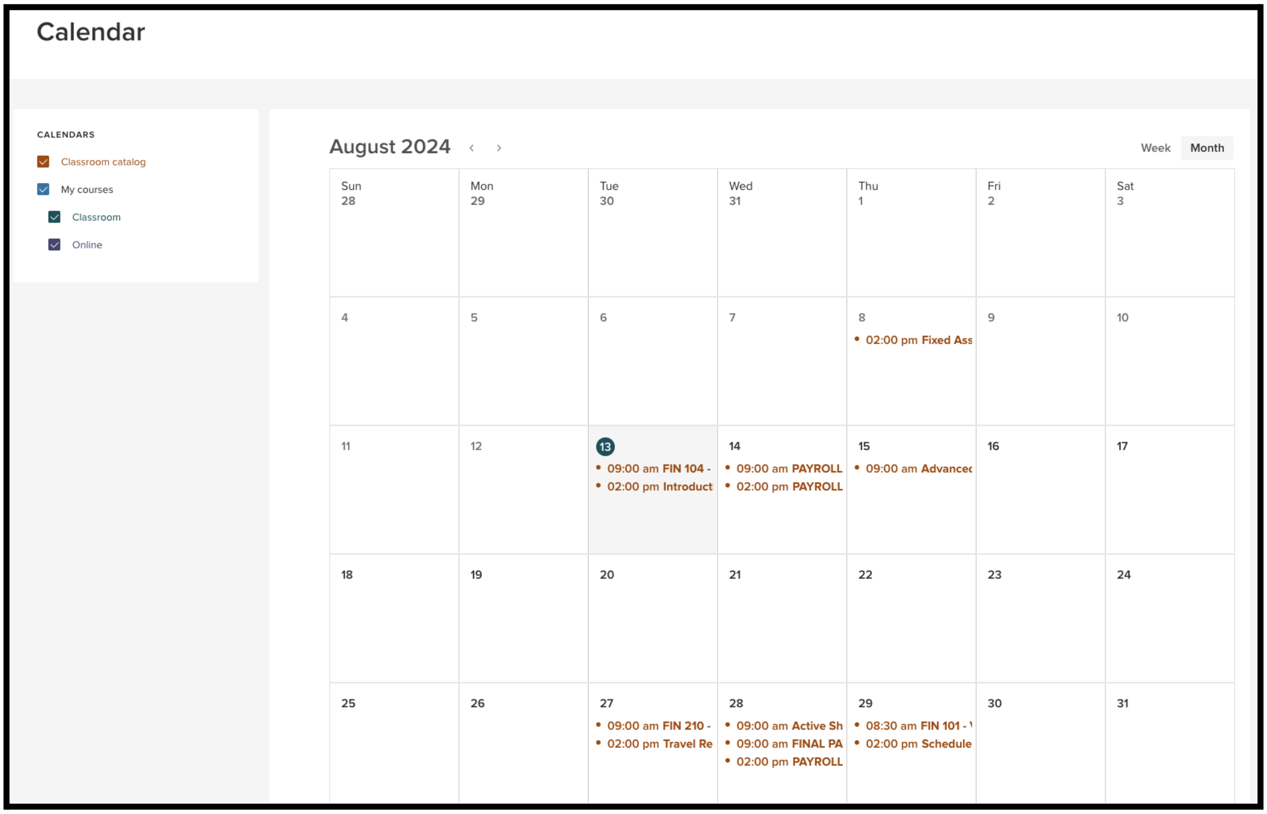
To navigate to the Course Calendar, select **Calendar** from the very right of the menu bar, located just underneath your profile dropdown.



Navigating to the Calendar

The color coded format makes it easy to track upcoming available classes and avoid missing important tasks.

The Calendar Legend displays to the left of the Calendar and lets you see at a glance what types of courses you are either enrolled in or are able to enroll in.



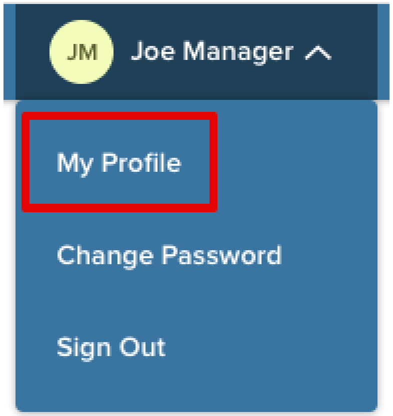
Calendar View

You can edit your view of the calendar by clicking on any of the legend items. Focus on classes to enroll in by unchecking the **My Courses** legend option or use the Calendar to focus on upcoming classes by unchecking the **Classroom Catalog**.

The Calendar view can be changed from the default month view to a week view if desired. Navigate between date periods by using the left and right arrows beside the month title.

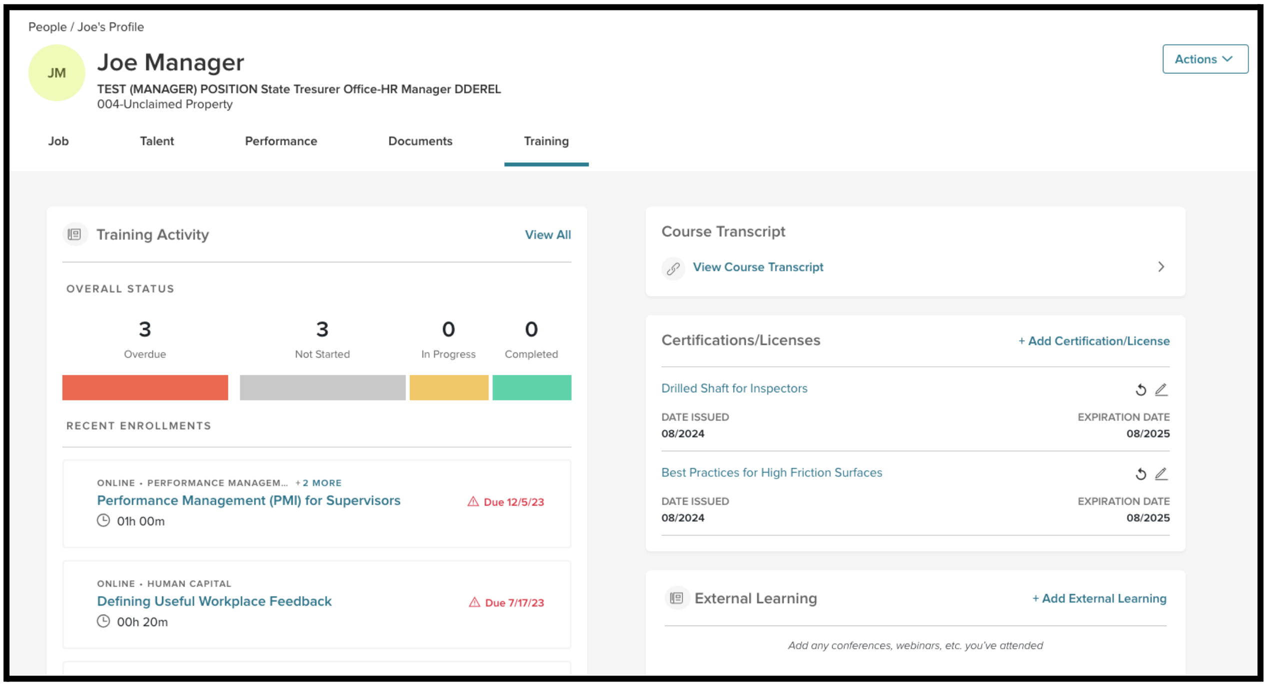
My Profile Training Information

In addition to these pages, you also have access to your **My Profile**, where you can access training information related to your specific account. To navigate to your profile, select the dropdown beside your name in the very right corner of the screen, then select My Profile.



My Profile Dropdown

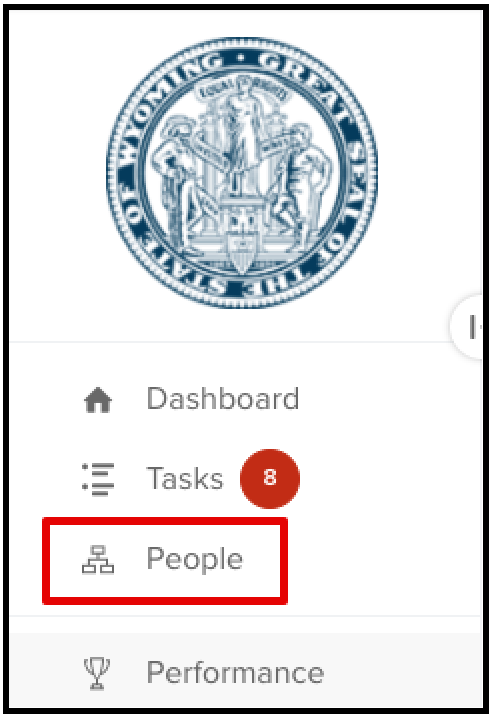
The **My Profile** page is a hub for all course information related to your NEOGOV account. Navigate to the **Training** tab to see all Learn-specific information. Learners can view course certificates, course transcripts, progress across recently enrolled courses, and action items for other enrolled courses.



The My Profile Training Page

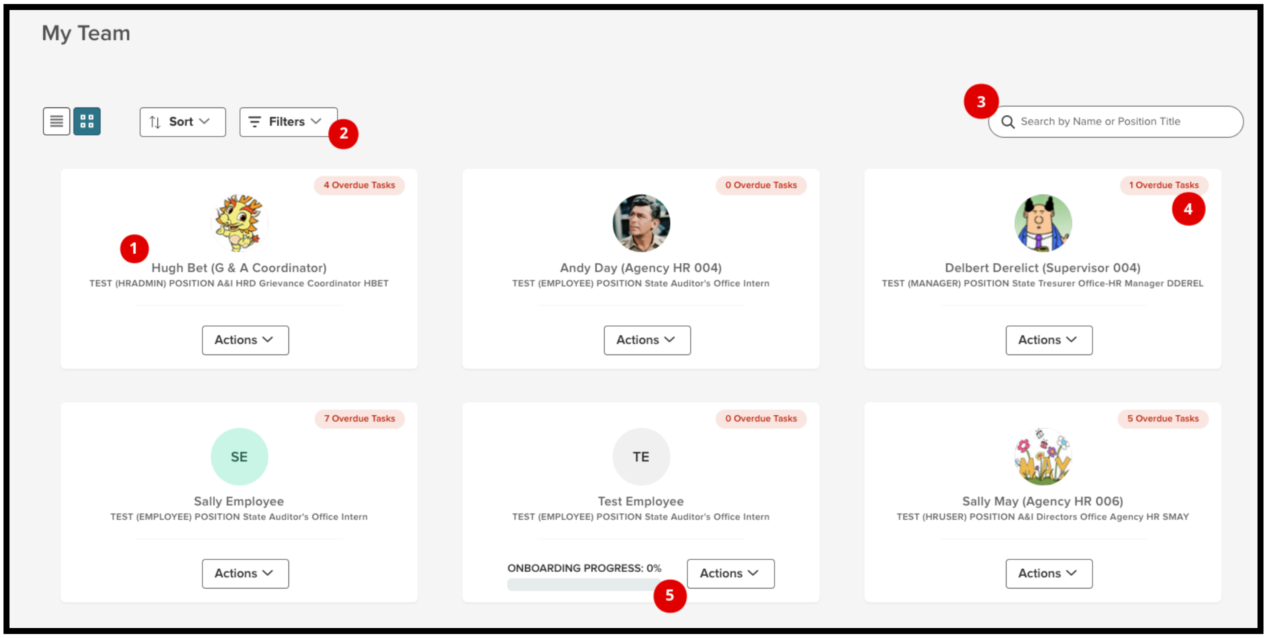
People

The **People** page contains important information and actions pertaining to your direct reports in one centralized and easy to access place. Select **People** from the left side menu.



People - Menu Option

The **My Team** page shows your direct reports' information and various actions including:

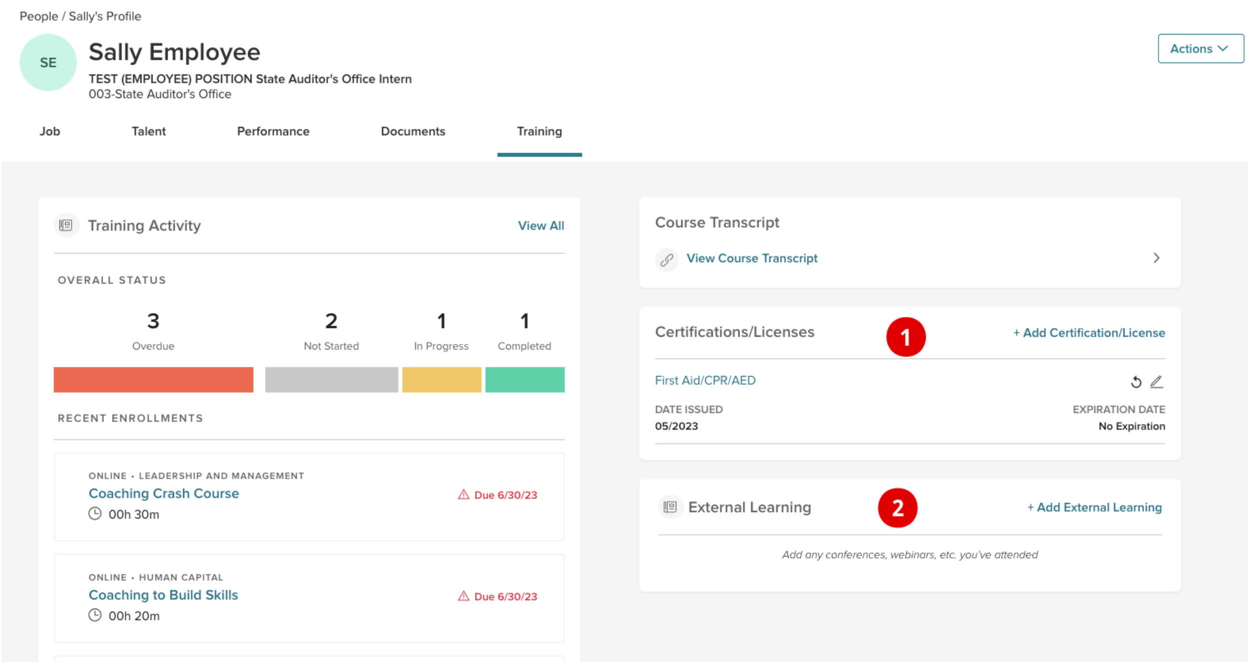


Employee Information Section

1. **Employee's Name:** Click to view their profile
2. **Filters:** Click to filter the list view, employee type, or position
3. **Search:** Search your employees by name or position title
4. **Overdue Tasks:** Click to view the employee's overdue tasks
5. **Onboarding Progress Bar:** If the employee is going through onboarding, view a high level summary of their progress

Employee Training Profile

Click an employee's name to go to their profile. The Profile has the same information you see in your own Profile page. The Training section of the Profile also contains the same insights into your direct report's training history as you see in your profile.

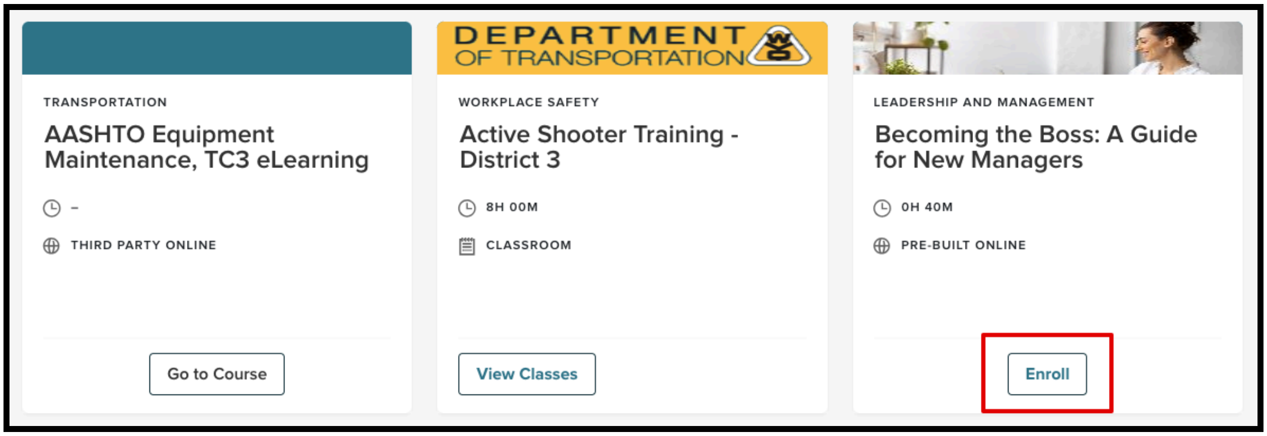


1. Managers can track **certificates and licenses** earned by employees on the Training section of the profile using the **Certifications/Licenses** section. Here you can also add any relevant certifications or licenses as long as they have been added to your agency's library by an administrator.
2. Managers can track training that is completed outside of the organization using the **External Learnings** section. Here you can also add External Learnings such as Seminars, Conferences, or additional training to the employee's profile. Managers can only add external learning if they have the ability to enroll others into courses.

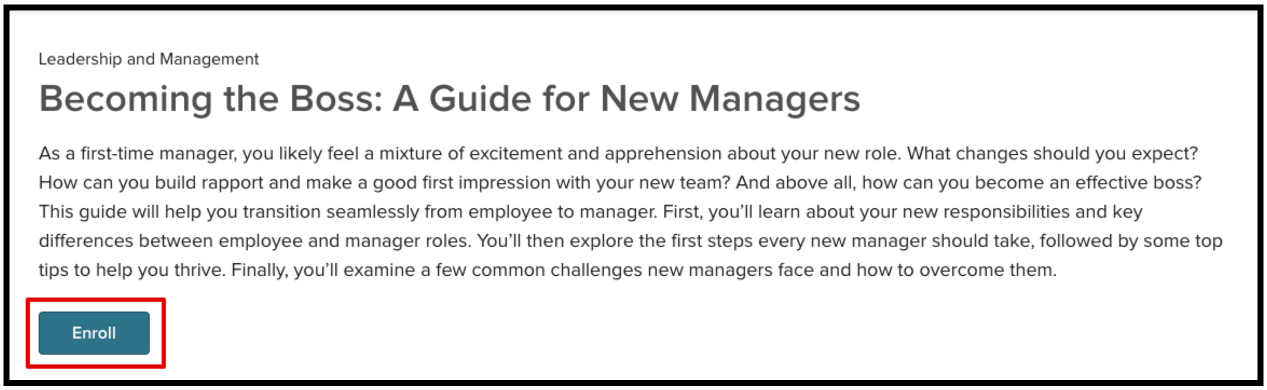
Course Enrollment

Enrolling Via the Course Catalog

Learners can enroll in any available course from the **Course Catalog** page if self-enrollment has been configured for that course. There are 3 different enrollment methods associated with 4 different course types. For **Pre-Built Online and Custom Online** courses… identify the course desired and either select **Enroll** from the course card or from the **Course Detail Page**. (Click the course title to get to the details page)

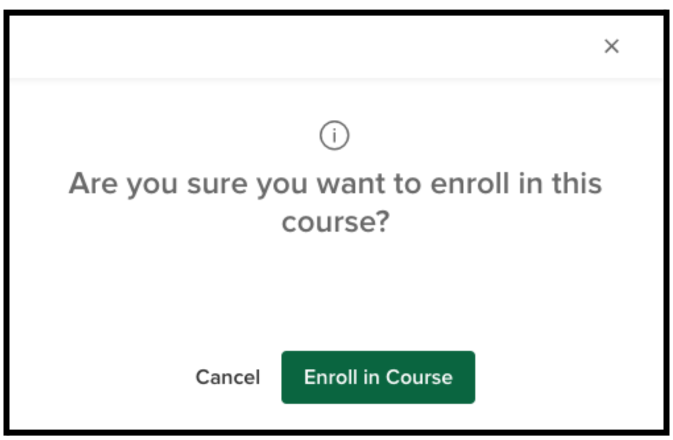


Course Card Enroll Button



Course Details Page Enroll Button

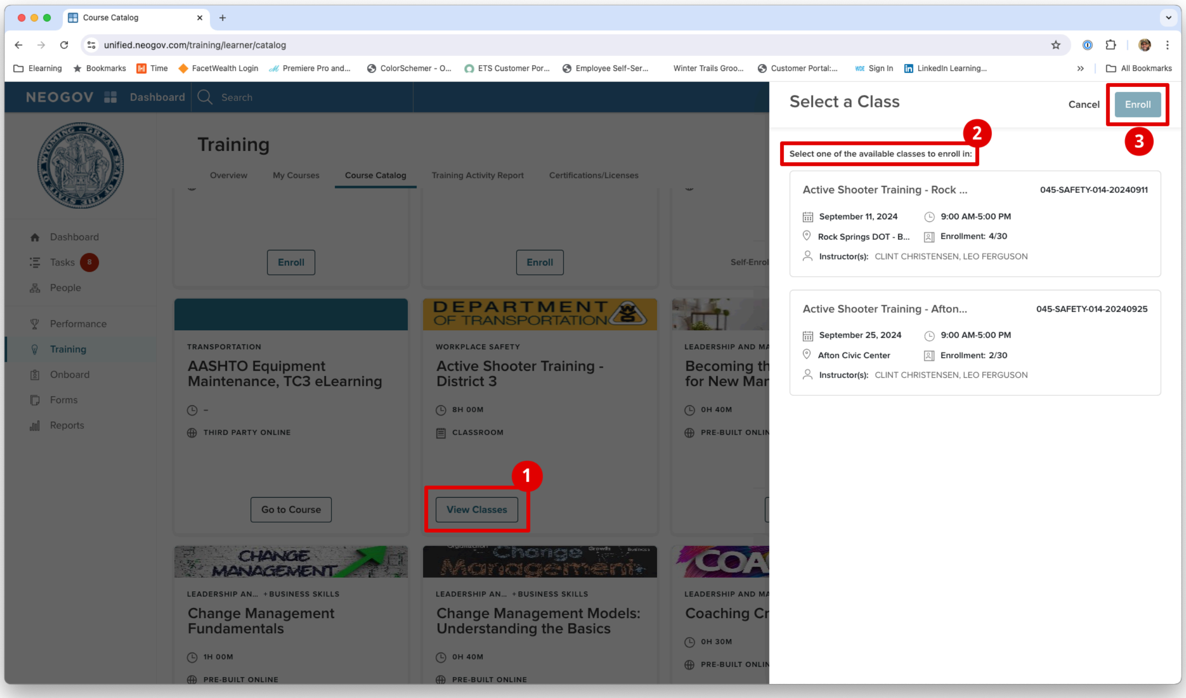
When you select **Enroll** a popup appears asking to confirm your enrollment. To confirm your course selection, click **Enroll in Course**.



Enrollment Popup

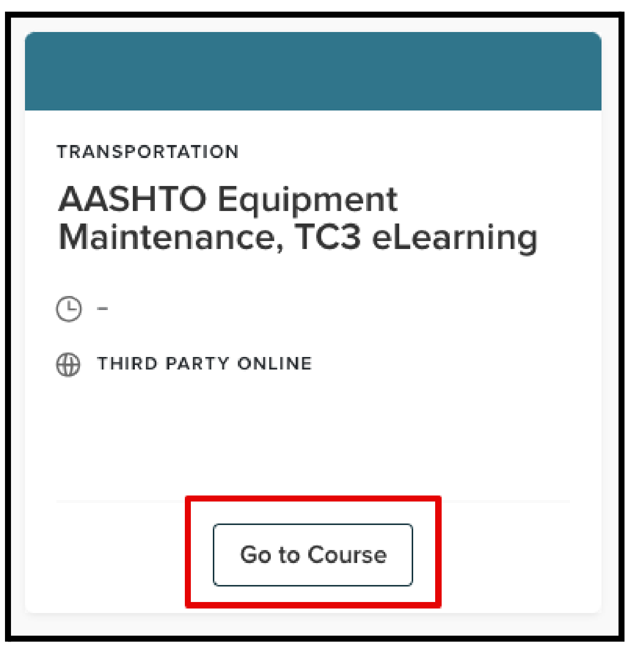
Once enrolled, the course will be associated with your learner account and can be accessed from the **Dashboard** page. Learners must successfully enroll in a course before having the option to view its content.

For **Classroom** courses, click on **View Classes**, choose the desired course and then click enroll. (See below)



Enrolling in Classroom Courses

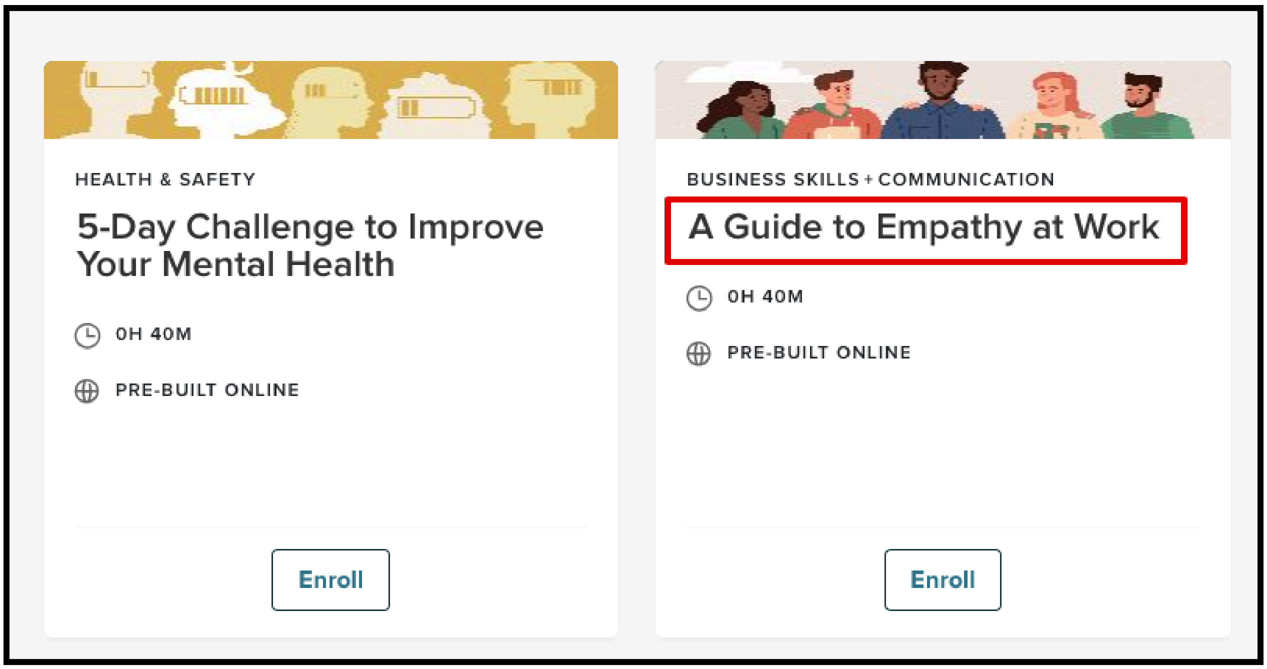
For **Third Party Online** courses, click on the **Go To Course** button and you will be taken to the website that hosts that course. (See Below)



Third Party Online Course Enrollment

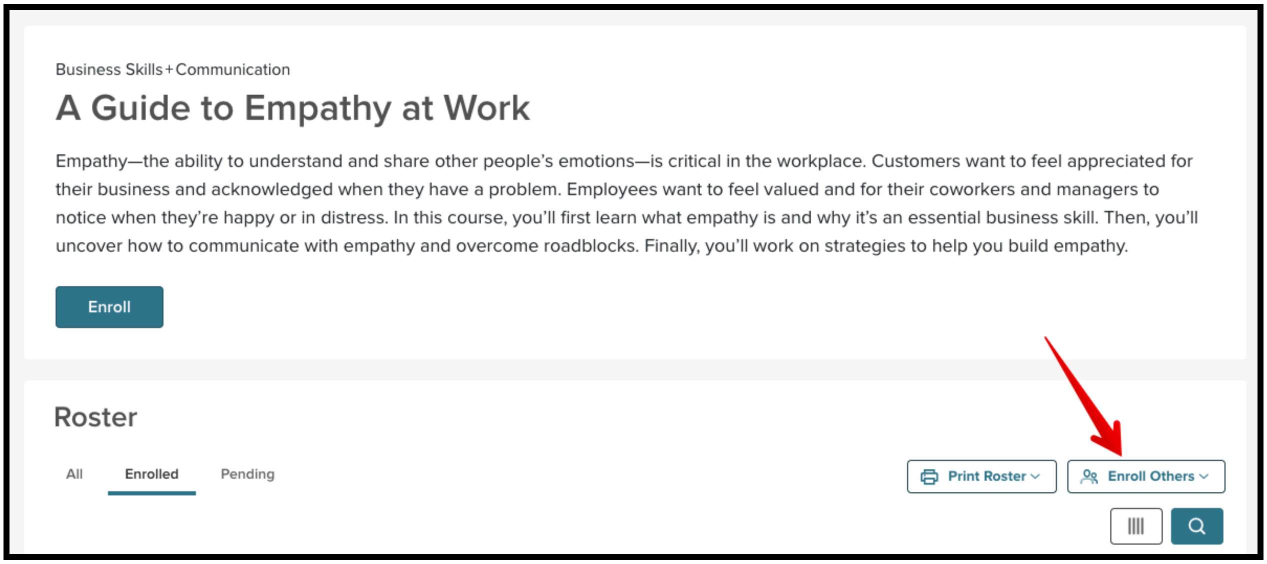
Course Catalog Enrollment for your Direct Reports

Managers Only - Managers have an additional tool to enroll direct reports from the **Course Catalog**. To do so, select the course name to be taken to the **Course Details Page**.



Select Course Name

To enroll your direct reports, select **Enroll Others**.



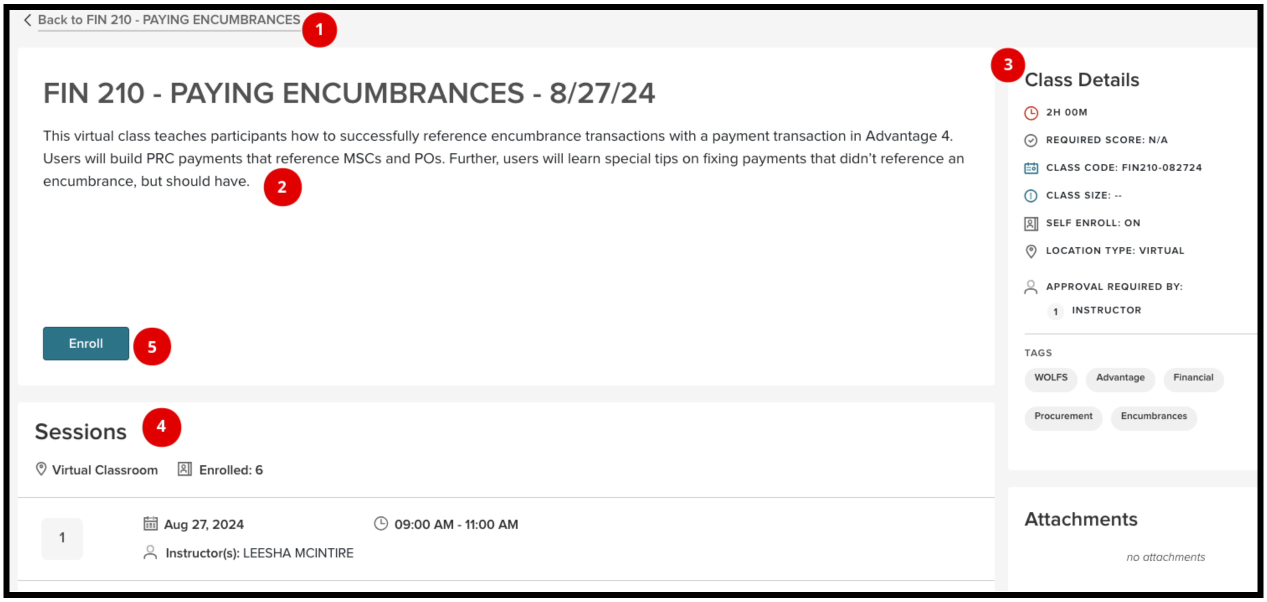
Enroll Others Button

Enrolling Via the Calendar

Learners can also enroll themselves in courses directly from the **Calendar** page.

All available courses to enroll in are displayed in orange. Click on any time and title of an orange class to open its **Course Details Page**.

Available Courses In Calendar



Course Class Page

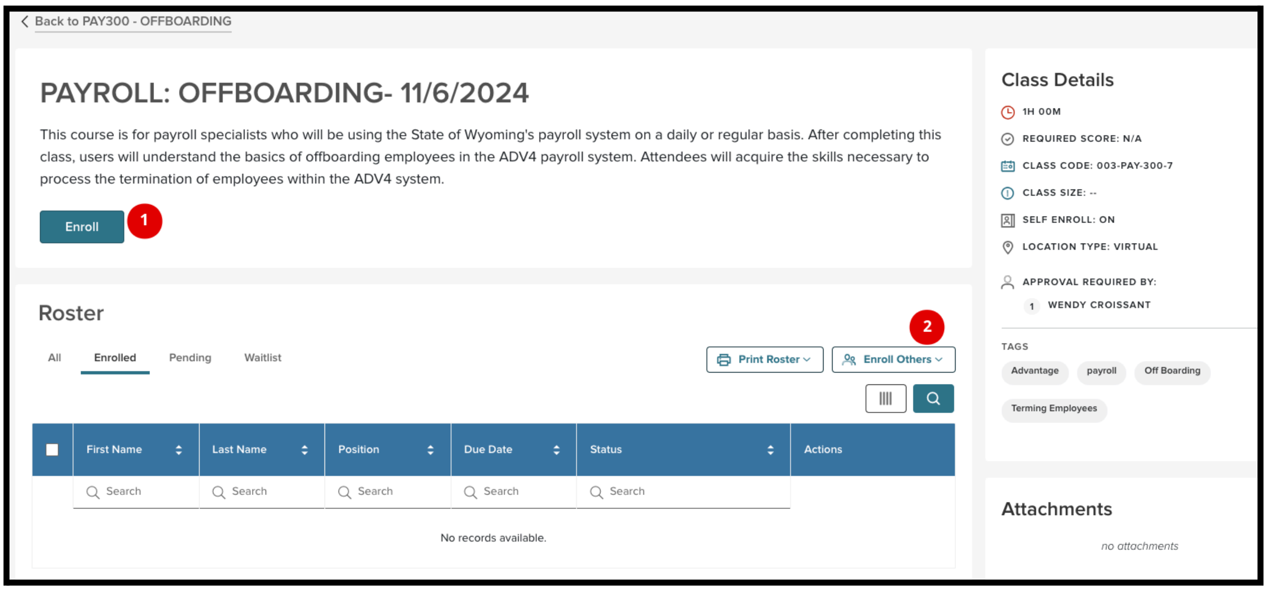
1. **Back:** Click here to view general information about this specific course
    a. Here you can access other course dates and enroll in one that is more convenient if the current course time from the Calendar is not compatible with your schedule
2. **Course Details:** A general explanation of the course
3. **Class Details:** View specific information for this class session
    a. Administrators may configure class dates differently depending on the situation which makes this area convenient for updates. This section outlines the basic administrative attributes as well as tags that can be useful when searching for this course in the future.
4. **Information (Sessions):** Details specific for this class occurrence in terms of where to complete the training (i.e., date, time, instructor, location)
5. **Enroll:** Select this button to enroll yourself in the course if you've decided to take this class
    a. Administrators must enable the self-enrollment feature in order for this button to appear on Learner accounts
    b. Same as previously addressed, when you click on the Enroll button a confirmation popup appears to confirm your enrollment in the course.

TIP: You can only enroll in **Classroom Courses** from the **Calendar**

Enrolling your Direct Reports through the Calendar

Managers Only - Managers are also able to enroll their direct reports from the **Calendar**. Click on a classroom course to view the class details page. This displays information about the course such as the duration, required score, whether approval is required, and the class size.

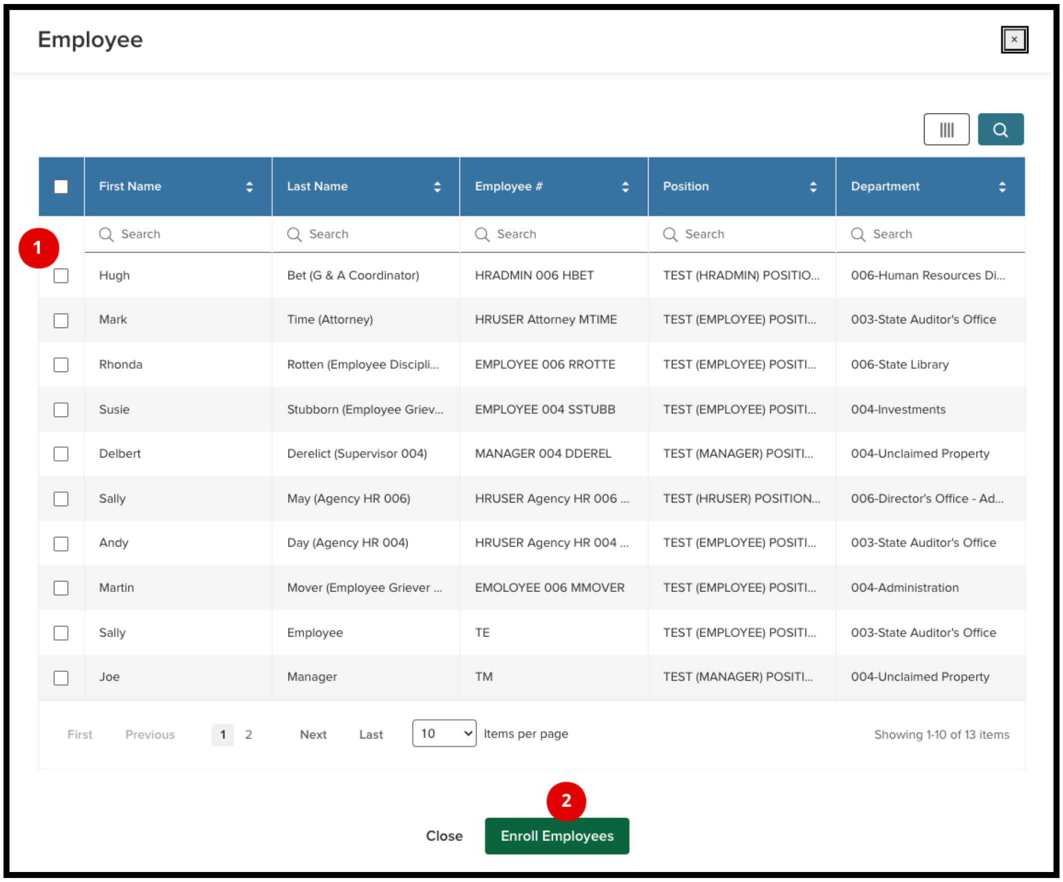
Below the description, you can view who in your hierarchy is enrolled in the course, pending approval, or on the waitlist. Enroll your direct reports in the course by selecting **Enroll Others**.



Course Details Page

1. **Enroll**: Enroll yourself in a course
2. **Enroll Others**: Useful for Managers looking for courses on specific dates/times to enroll their team (or anyone in their direct report hierarchy)

After selecting **Enroll Others**, a popup appears to complete the enrollment.



Enroll Employees Steps

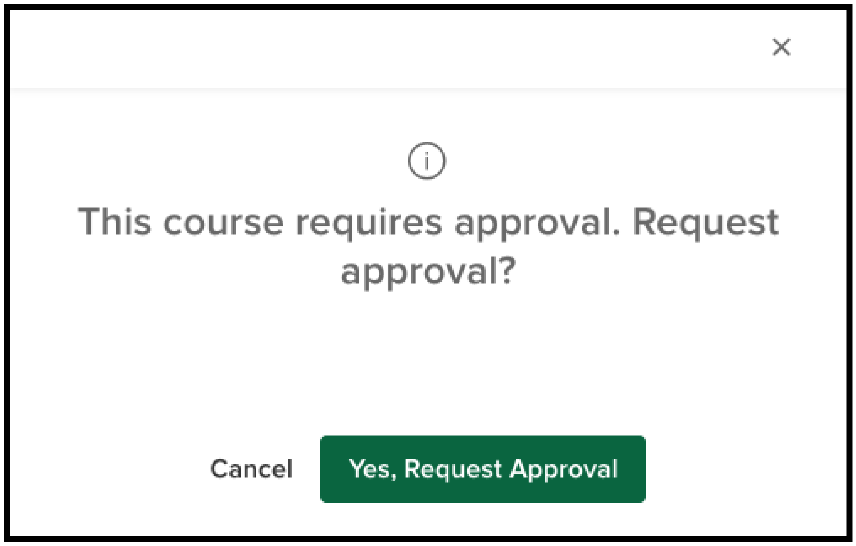
1. Select the employees you wish to enroll
2. Select **Enroll Employees**

TIP: You can only register for **Classroom Courses** from the **Calendar**.

Course Approvals

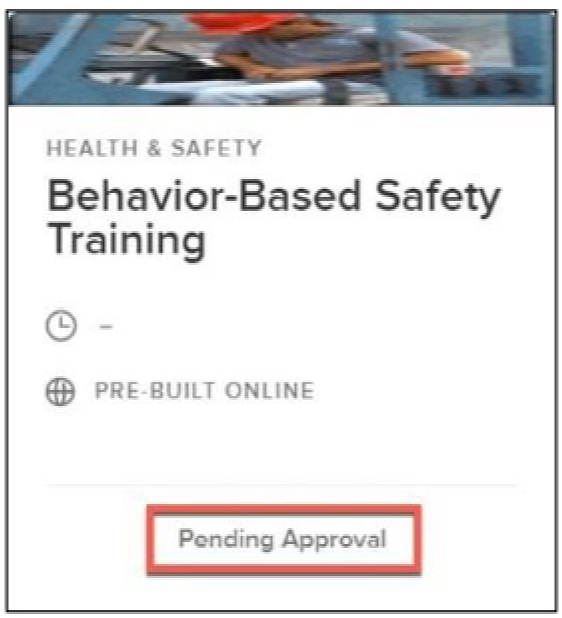
Some courses may require approval from a manager, instructor, or administrator before the enrollment is complete. The enrollment process changes slightly in this situation.

If the course requires an approval the enrollment message changes to reflect that requirement. A confirmation message appears after the course approval has been sent.



Request Approval Popup

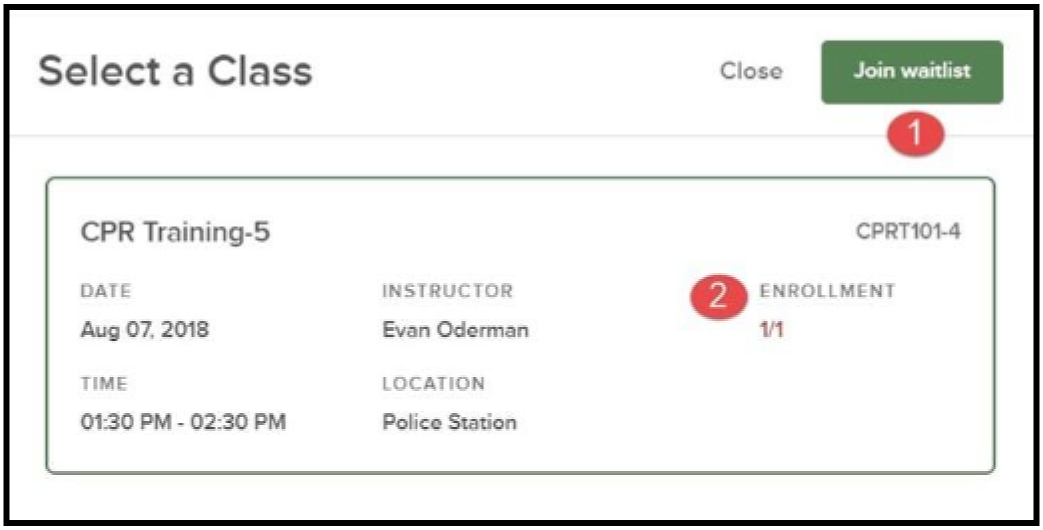
The enrolled course displays **Pending Approval** until the course has been approved by a manager, instructor, or administrator. The “**Online Course Enrollment Approved Request**” email notification is sent to the learner after the course has been approved.



Pending Approval Status Label

Course Waitlist

You may enroll in a course that has reached maximum capacity. This functionality is course specific and may not apply to all courses. You will see a **Join waitlist** button instead of an Enroll button when enrolling for one of these courses.



Join Waitlist Button

1. **Join Waitlist**: This message appears rather than Enroll Me when the desired class is full
   a. Select the icon to be placed on the waitlist. If there are approvals required, the approval will need to be completed before you are added to the waitlist.
2. **Enrollment**: Within the Course Details section is the Total Course Capacity for this date along with the current number of Learners already enrolled

Completing Different Course Types

The Learn system contains three course types: Classroom, Pre-Built Online, and Custom Online. This section outlines how to open each type of course and complete it.

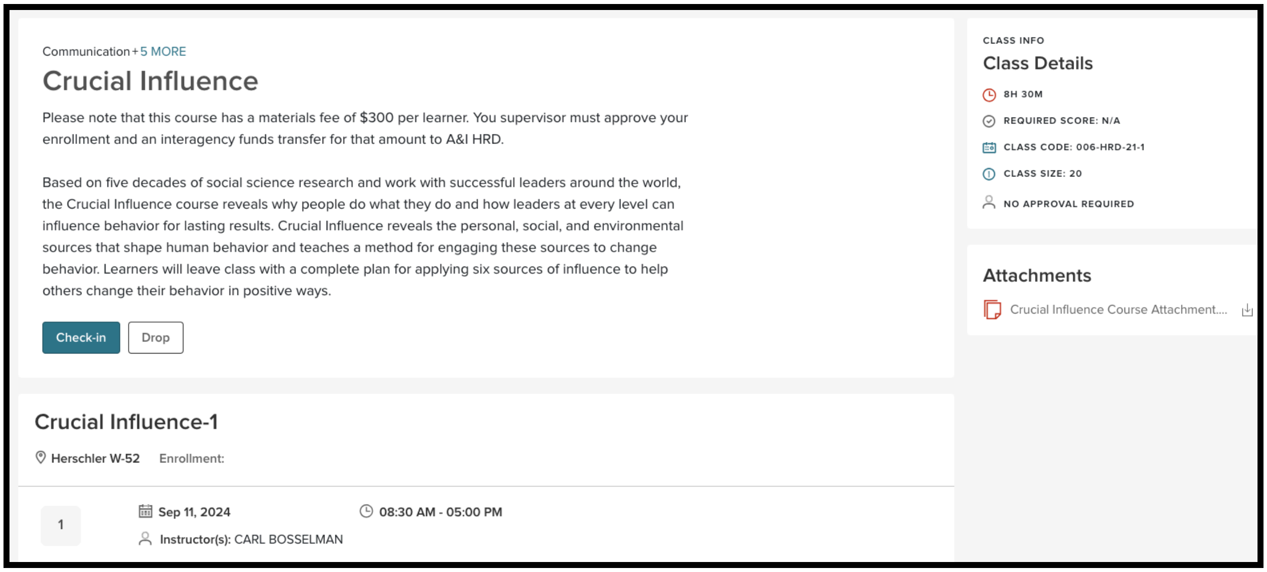
Classroom Courses

Classroom Courses are courses completed outside of the system at a physical location with a live instructor. After you've attended the class, you may check the status of your completion via the Learn system. However, you cannot complete a classroom course directly in the system the same way an online course is completed. For classroom courses, an administrator must process the completions on the roster.

Let's take a look at a **Classroom Course**. Identify one by the **Delivery Method Type** on a course card – accessible from either your **Dashboard** or **My Courses**. You can see below that after being enrolled in a classroom course the only available Action buttons are Drop and (sometimes) Check-in. (Your instructor will explain how to use "check-in") Drop is the only selection because classroom courses can't be completed online.

When it comes to completing a course, most of the work is done outside of the system. Ensure that you attend the class at the designated date, time, and location. Once you attend the physical class, the rest is up to the Administrator. For classroom courses with required scores, Administrators also enter scores on their end of the system once the course has been completed.

Classroom Course Card

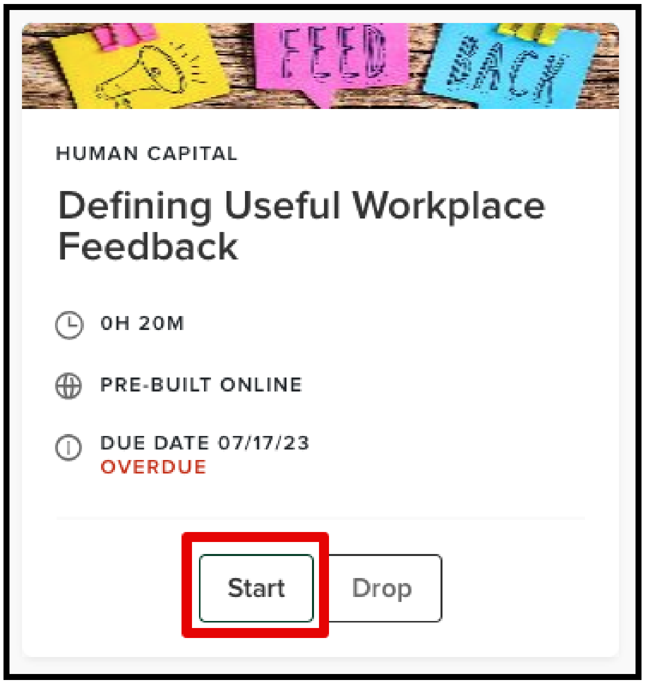


Classroom Course Details page

Pre-Built Online Courses

Pre-Built Online Courses are one of two online courses available (the other being **Custom Online Courses**) for learner enrollment.

Let’s take a look at a **Pre-Built Online Course**. Identify one by the **Delivery Method Type** on a course card – accessible from your **My Courses**.



Pre-built Online Course Card

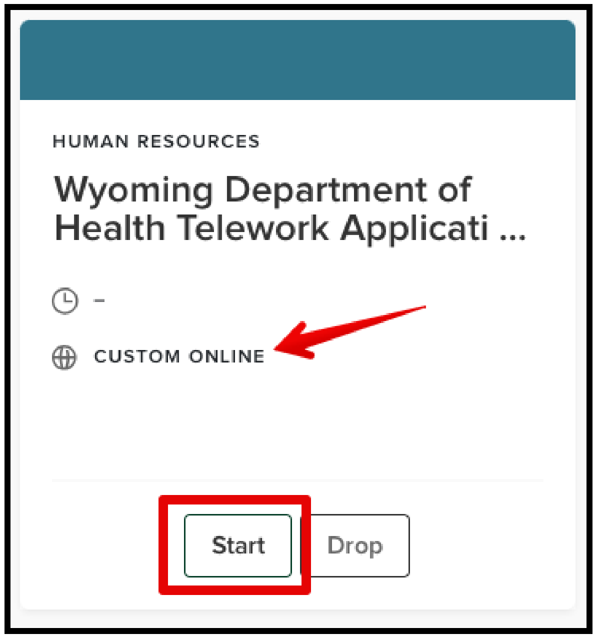
Click on the **Start** button to launch the course.

NOTE: Starting a course in Learn removes the ability for the user to drop the course later. After a course is started it is then required that the user resume the course to complete it.

TIP: Courses open in a new browser tab, so ensure your browser's popup blockers are disabled for NEOGOV websites.

Custom Online Courses

The third type of course available to you are **Custom Online Courses**. These are created by administrators, who have the ability to create custom online courses for learners to complete online via the Learn system. This allows for administrators to create their own course content.



Custom Online Course Card

Custom Online Courses complete just like the **Pre-Built Online Courses** above. Click the start button to take the course.

NOTE: Starting a course in Learn removes the ability for the user to drop the course later. After a course is started it is then required that the user resume the course to complete it.

After the Course

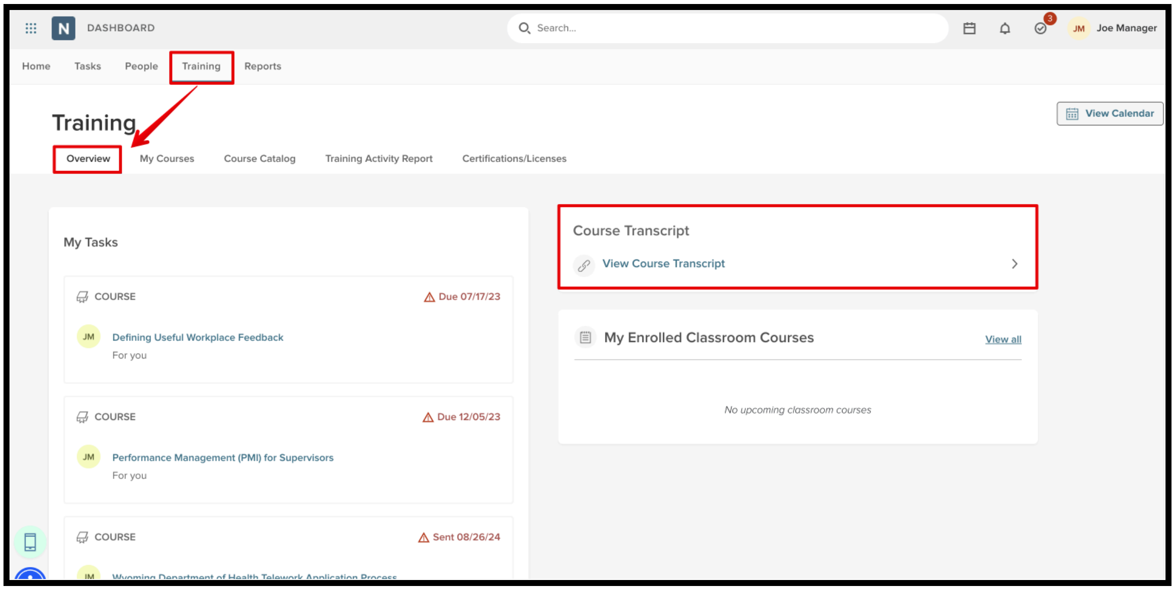
When you start completing courses within the system, you can see your accomplishments reflected within your profile statistics and you can view transcripts of all the courses you've completed. All of this information is easily accessible from your **My Courses**.

One way Learn allows you to keep track and show off all the courses you've completed is via your **Transcripts**.

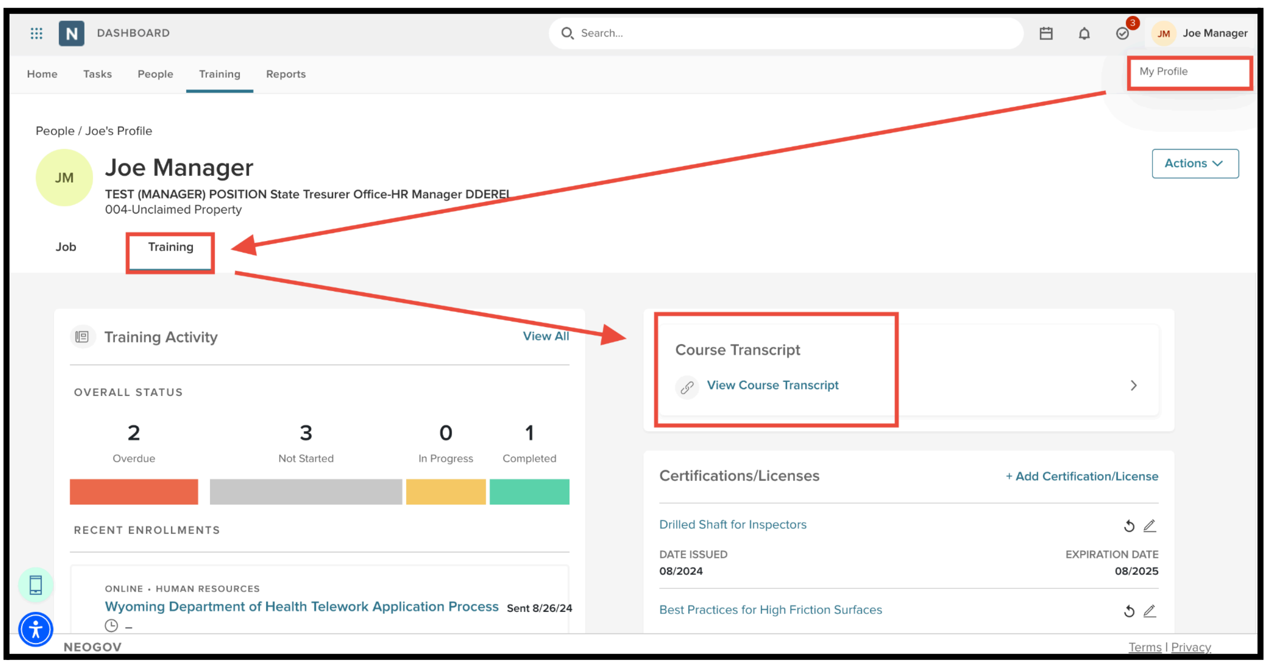
Transcripts

The **Transcripts** page is a list of all your courses, sorted by total versus completed. This page is especially useful for learners who want to export a transcript of all completed courses at once.

You can find your transcripts by clicking on **Training** on the left hand side of your **Dashboard** and then making sure you are on the **Overview** page. Next, click on **View Course Transcript**. (see below)



You can also find your **Transcripts** by going to your **Profile**, then **Training**. (see below)



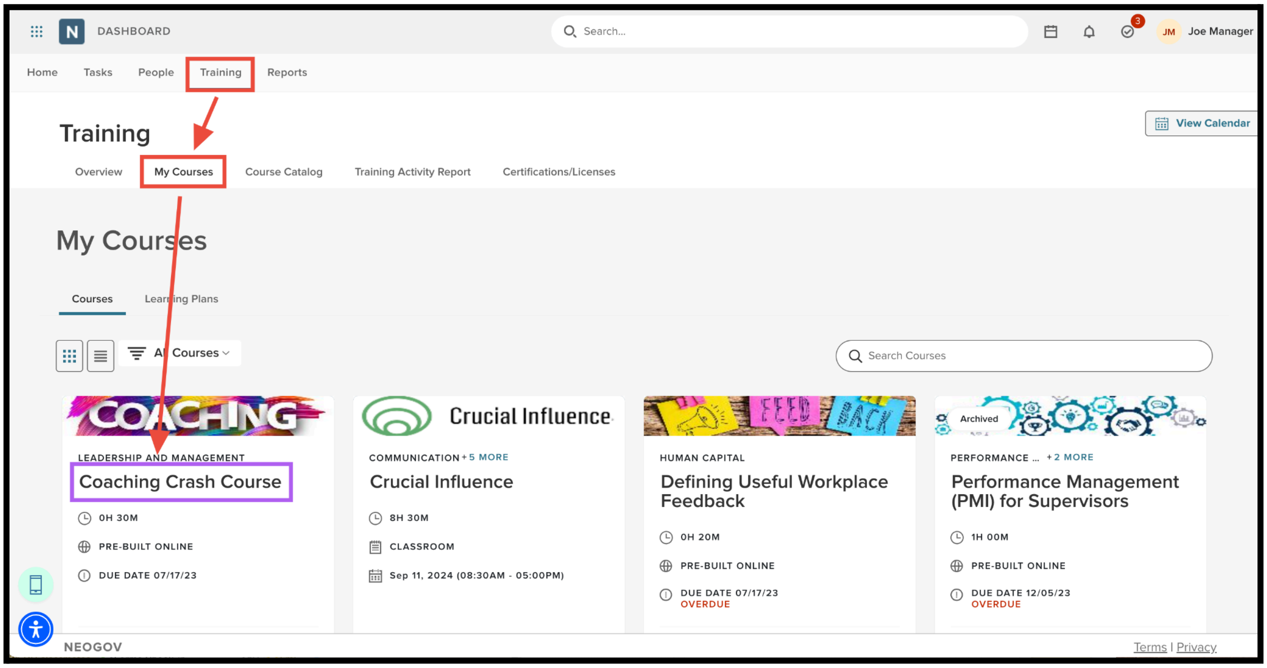
How to access your transcripts

Certificates

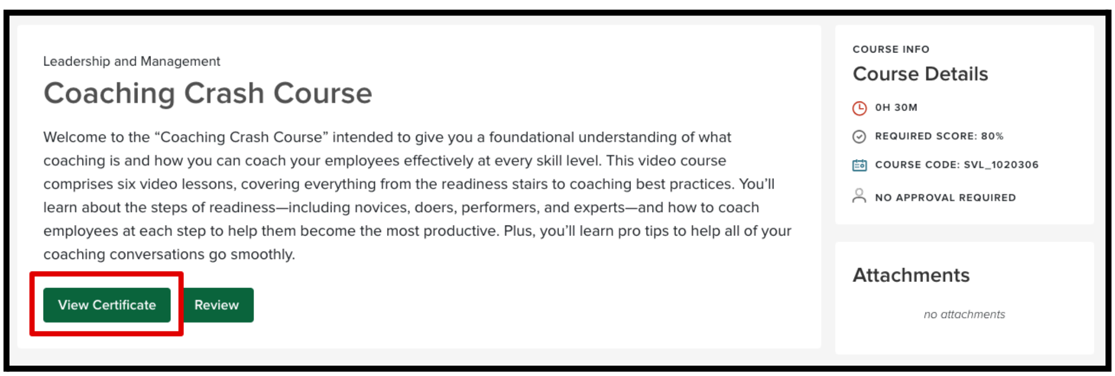
After completing a course you're also given the ability to see the results of your course in the form of Certificates! This display of achievement instills a sense of accomplishment in Learners by acknowledging their efforts to improve their skills.

You can access Certificates from **Training** > **My Courses** > **Course Title**. The **View Certificate** button can be used to view and print the course certificate.

Certificates open in a new browser tab, so ensure your browser's popup blockers are disabled for NEOGOV websites.



Navigating to the Certificate



View Certificate Button

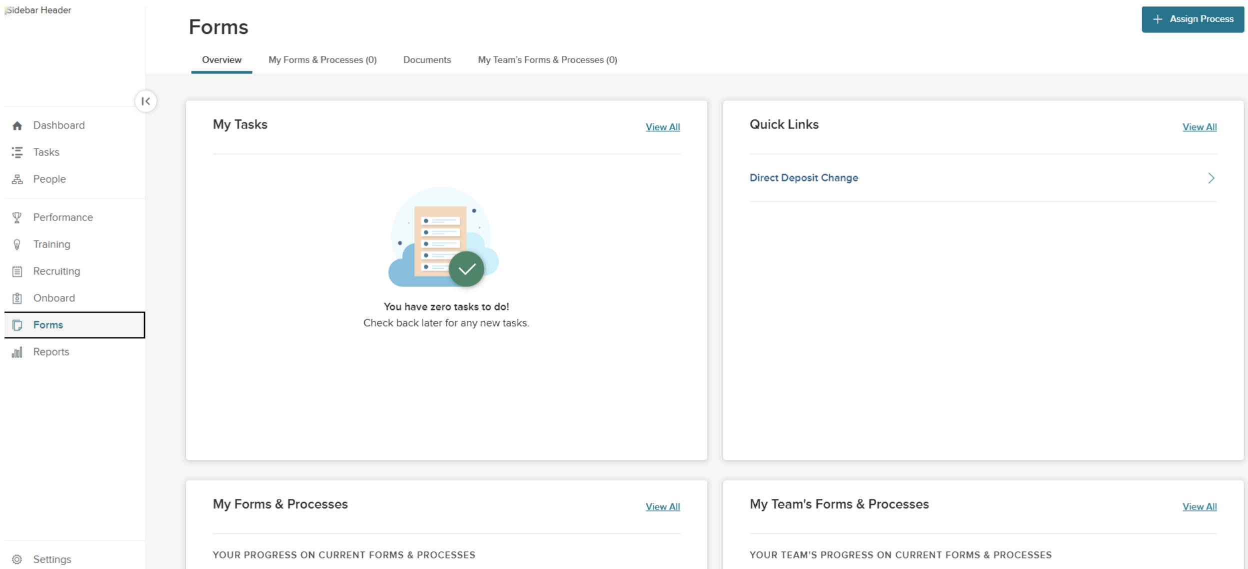
Learners can view the certificate and click **Print Certificate** to print the image shown. This section is also available to managers who may be reviewing the profile of their direct reports.

Print Certificate View

eForms

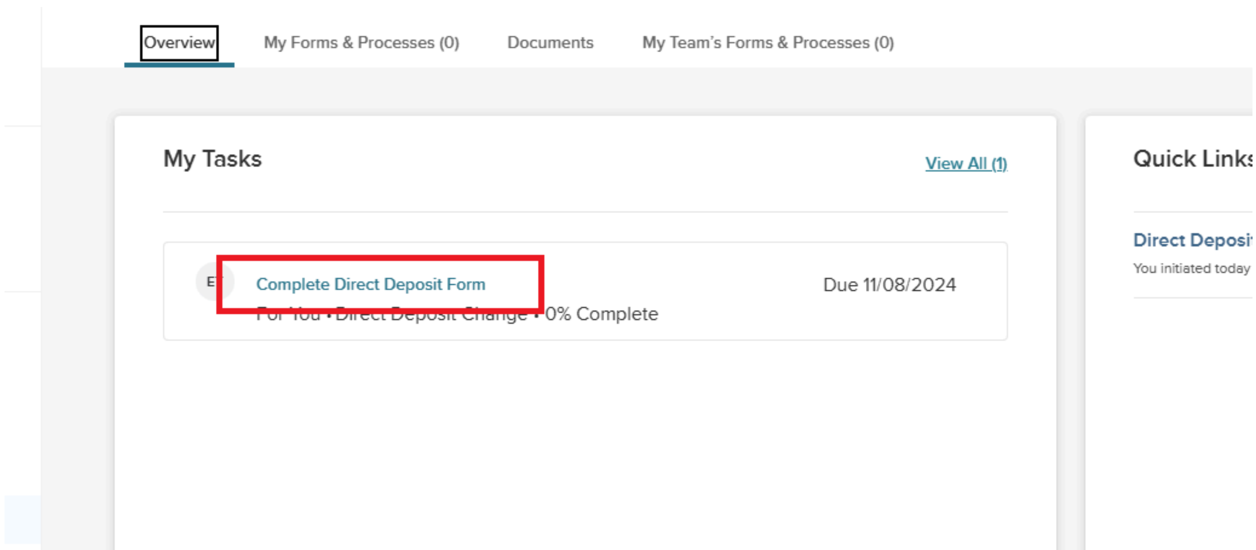
Overview

Access the eForms **Overview** page by clicking on **Forms** on the left-hand menu. The Overview page will show your assigned tasks, Quick Links for processes that you have access to, and current processes that are in progress. In eForms a *process* is any series of related tasks, which could include forms, questions, or sign-offs. Processes automatically assign tasks and route forms in the relevant order.

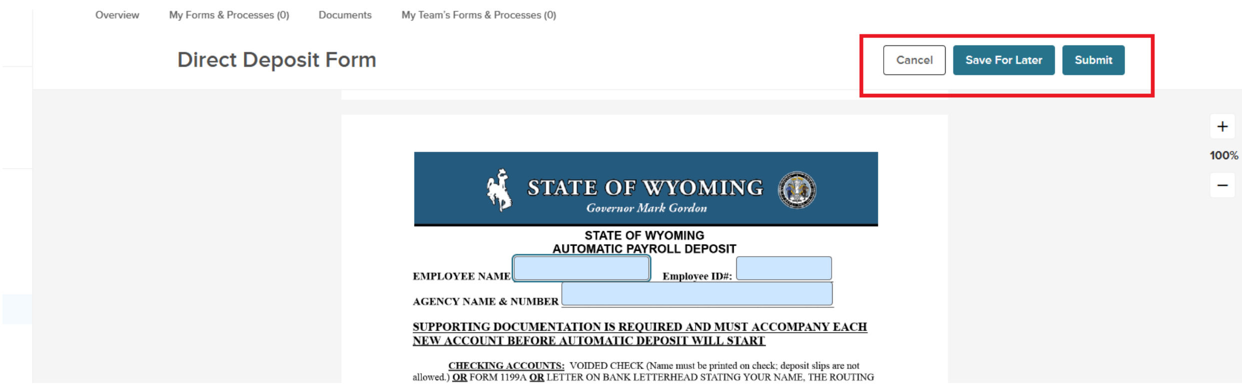


Completing Assigned Tasks

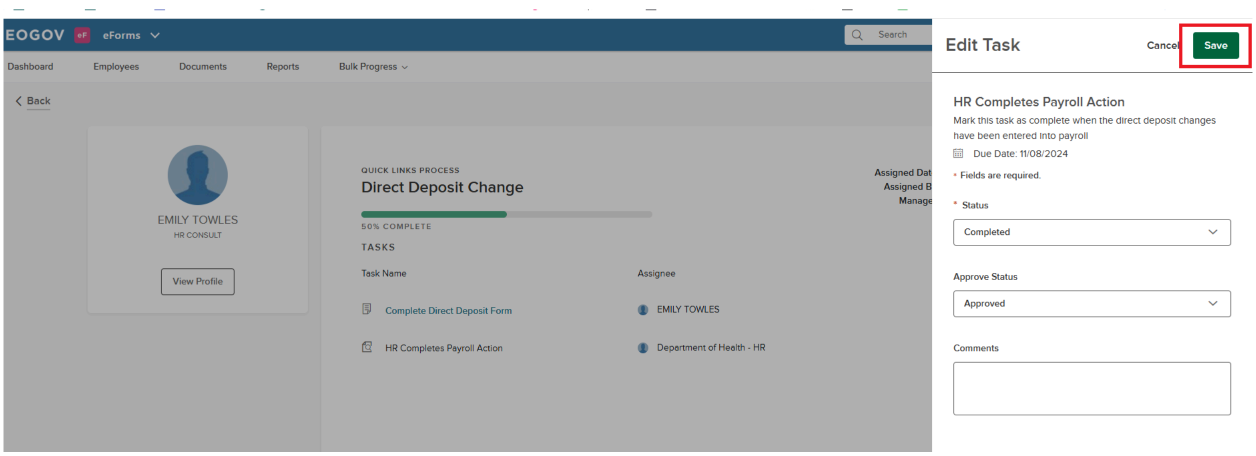
When a task is assigned to an employee, it will appear both in the **My Tasks** section of the Overview screen and in the **Tasks** list on the main dashboard. Completing a task is the same, regardless of where you access that task. To complete a task, simply select it from the list and follow the instructions to complete it.



If the task is a form, required fields will be marked with a red asterisk. Once a form has been completed, scroll back to the top and click **Submit**. Partially completed forms can also be saved for later.



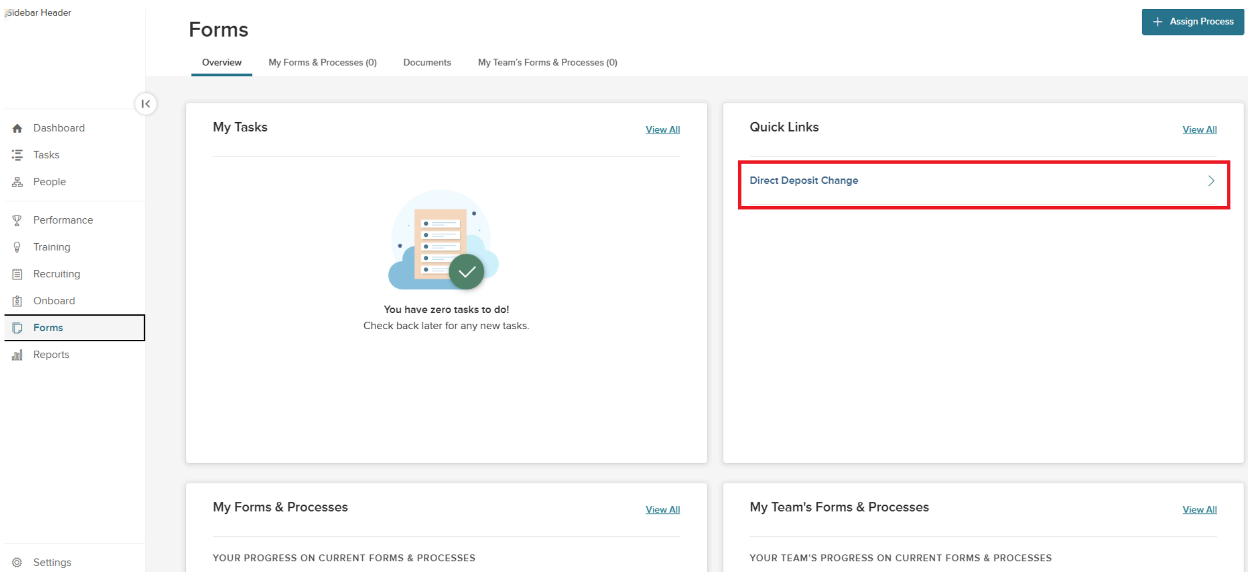
Some tasks will simply be a review or approval step, which will open in a fly-out on the right side of the screen. In this case, simply update the relevant fields and click save.



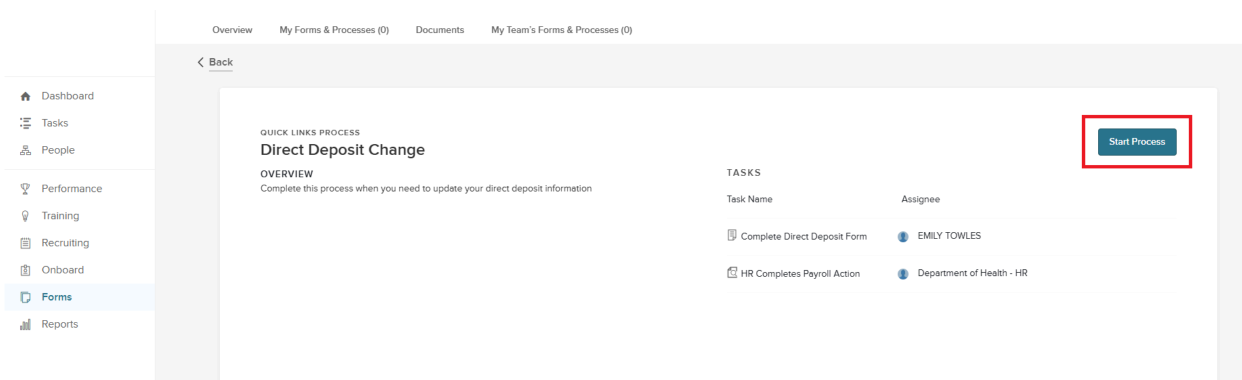
Once a task has been completed, the next task will automatically be assigned to the correct person(s) on the route tree.

Self-Initiated Processes

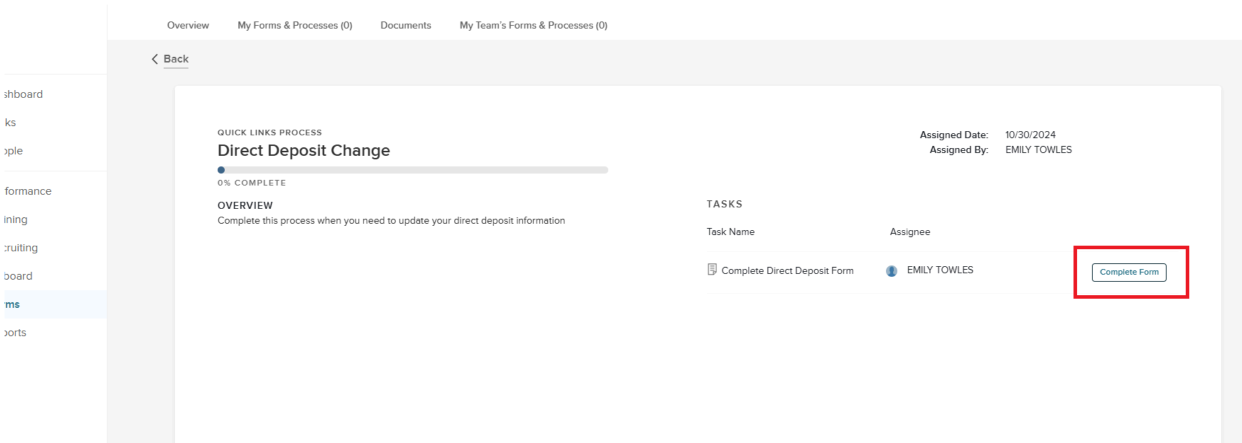
Some processes can be initiated by the employee. To do so, select the process that you wish to begin from the **Quick Links** section.



This will open an overview of that process. To begin the process, click **Start Process**.

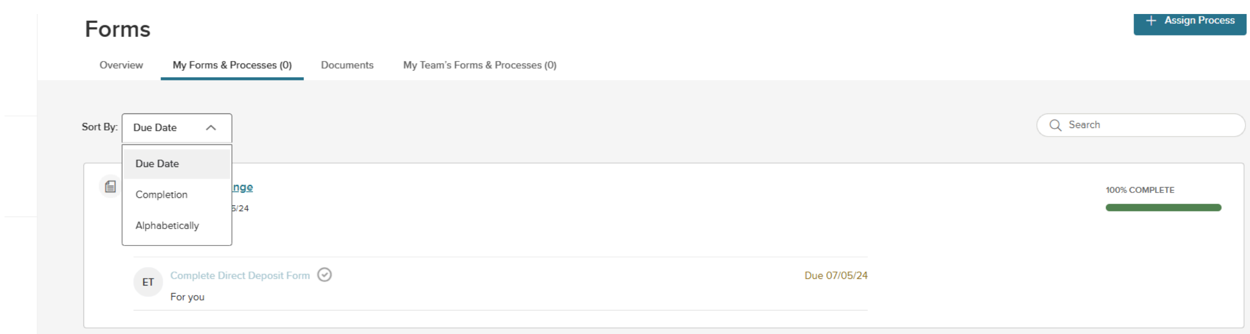


From here, you can complete your assigned tasks by clicking on the relevant button–in this example, the task is a form so the button reads **Complete Form**. Alternatively, the task can be accessed from the task list, as shown above. Completing the task will be the same, regardless of how it is accessed.

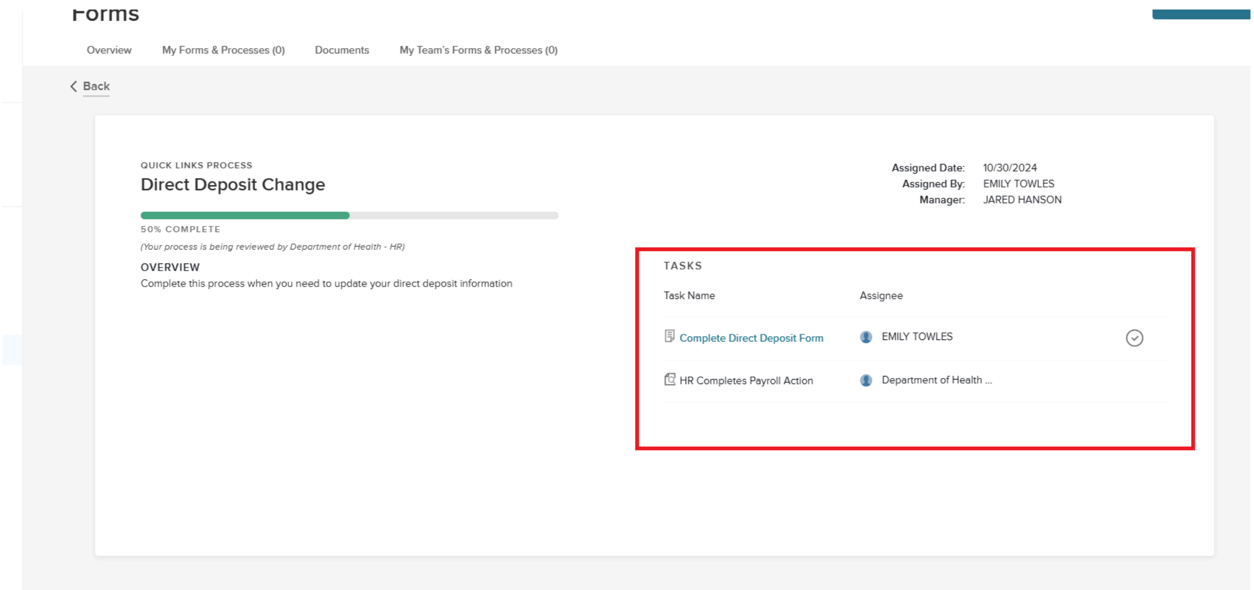


Tracking Processes and Completed Forms

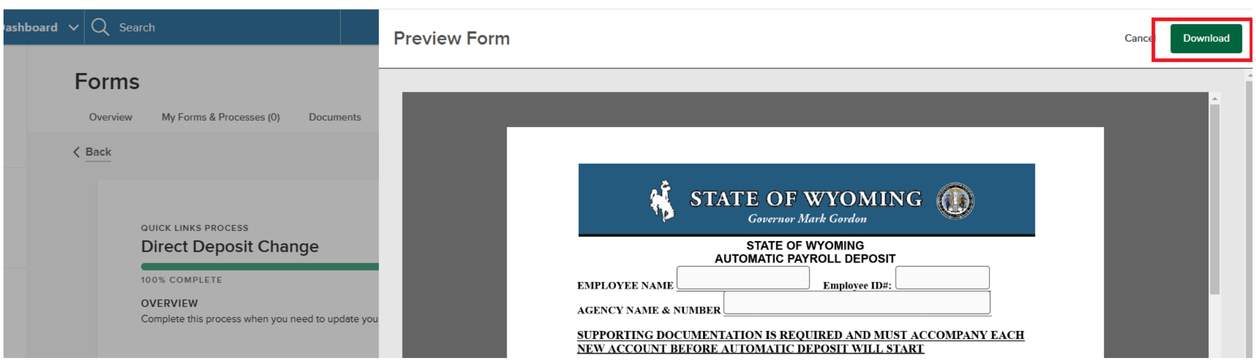
Processes that are in progress can be accessed by selecting either **My Forms & Processes** or **My Teams Forms & Processes**. These tabs will show a list of both completed and current processes. The list can be sorted by Due Date, Completion, or Alphabetically.



Click on a process in the list to see more details about that process. This screen will show you which tasks have been completed and what step the process is currently on.



If the task includes a form, the task name will show as a link. Clicking on the link will open a copy of the completed form. From here, the form can be downloaded if desired.



Analytics and Reporting

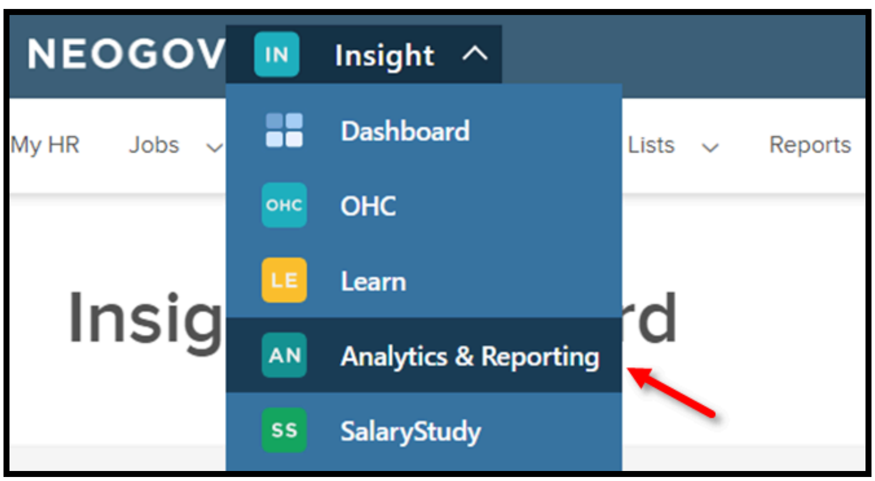
Analytics Security

All Insight users assigned Insight User security roles have access to Analytics by default. Only the system administrators and analytics administrator roles have access to configure the definition of time to hire. Insight Administrators can grant this access to users assigned to custom roles if necessary.

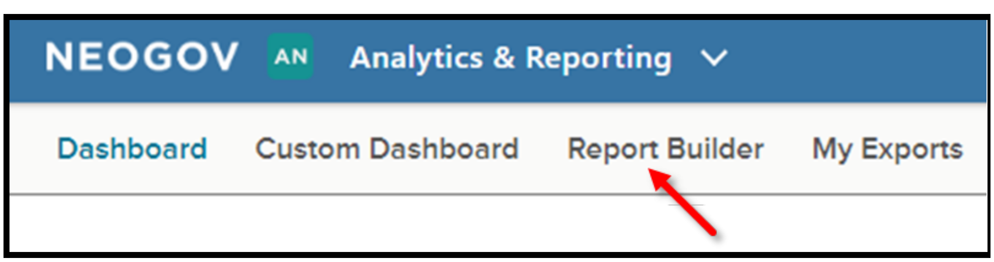
Note: There is training available for Analytics & Reporting in Help & Training

Navigating Analytics and Reporting

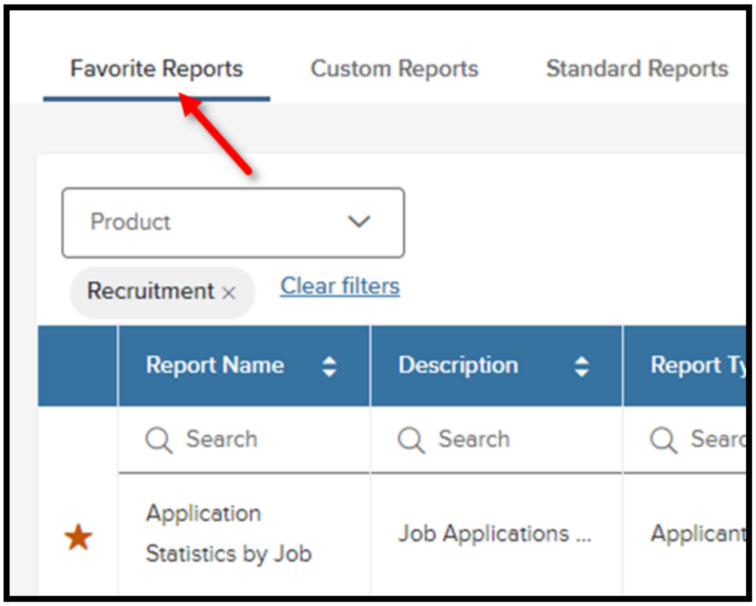
The new version of Report Builder can be accessed in the Analytics & Reporting module in Insight.



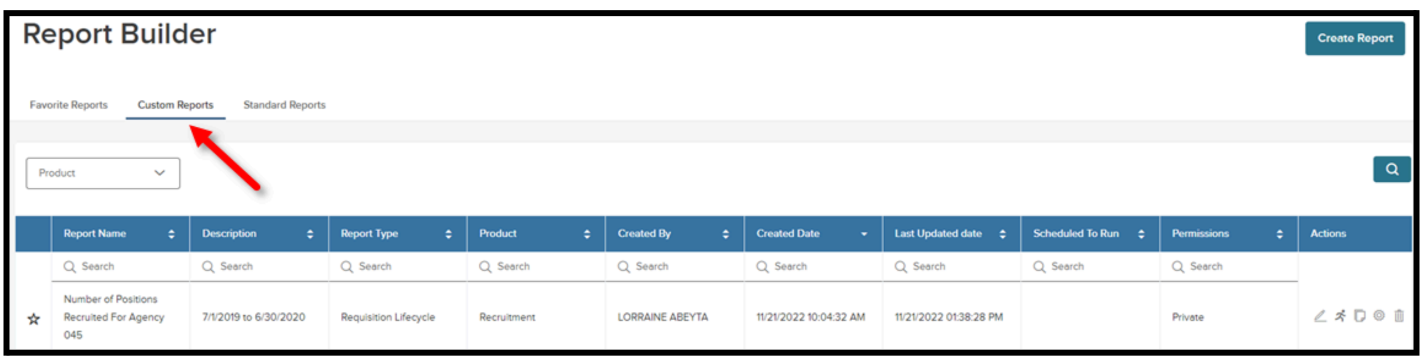
Click on the Report Builder menu to access the saved reports page.



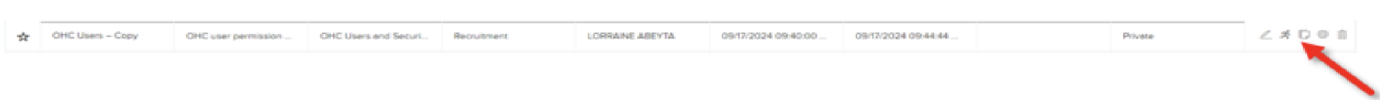
On the navigation menu bar, click Favorite Reports, which shows the Reports you starred as your Favorite reports



Custom Reports are the saved reports that you created in the past.



Below the Actions column, you can edit, run, or copy a report.



Helpful Links

Emails

Insight/OHC - strecruitment@wyo.gov
Perform - ai-hrd-pa@wyo.gov
Learn - ai-neogov-training@wyo.gov
Onboard
eForms

Other Links

Administration and Information Website
Neogov Login Page
PMI Toolbox