WILMa FAQ's

Contents

Deleting Venues

Please note any venues that are no longer going to be used we are to put ZZZ before the venue and room within WILMa.

eg) ZZZ Old Trafford - Committee Room

Please note if a venue is going it will have to be done for all rooms not just one. Please make sure the ZZZ are all in capital letters.

This will identify to all that the venue/room is no longer being used but will also appear in our reports and remain in the system.

Username - Please do not change if WCC delegate

Please note if you are in WILMa as a site administrator please do not change the username or alter this by adding an additional number for example. As they have come through on the HRMS upload by doing this you will be duplicating the delegate again when the next upload is done.

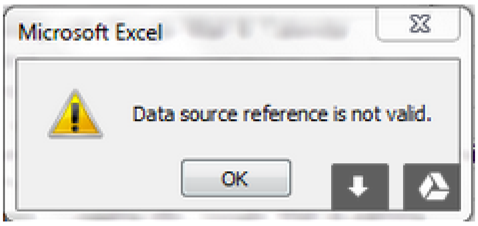
User Generated Reports

For clarity, moving forward, the names of user generated reports should always start with the three character prefix used when naming face-to-face courses e.g. IT L&D use ICT.

If you have a user generated report that you currently use please edit the report name to start with the three character prefix used by your team.

WILMA Reports - Downloading data to Excel

An issue was highlighted for Internet Explorer users, when they downloaded data from a WILMa report. The following error message was displayed in Excel when using the downloaded data.



If you use Internet Explorer to access WILMa, please ensure that when you export the data to Excel you click 'Save' from the dialog box displayed below and create the file in a folder you select.

If you then open this file from within Excel you will not experience this issue.

Please note this issue does not affect Chrome users.

Blanks Fields

Please note do complete fields in WILMa for WCC staff that are coming across as blanks from WILMs as this can cause errors which are time consuming for Learning Pool to fix. They strongly advise that we ensure that the information in HRMS correlates with the information that is in WILMa.

Preferred Name

The HR Team have stated they are able to overwrite the 'forename' with the 'preferred name' in the extract before they send to LP. HR Admin have been informed of some 'Preferred names' with spelling or grammar issues in which they are to change.

The HR Team will make sure any blank 'preferred names' does not overwrite the 'forenames' first

Deleting records in WILMa

Please note if you delete a delegate on WILMa you will be deleting all their training history including what they have booked onto.

If you are deleting a delegate that has been set up as a new starter due to their HRMS record now being on WILMa, the training history of the 'soon to be deleted delegate' will need to be migrated into the record your keeping on WILMa **before** you delete.

This has caused a problem especially for a delegate that had unapproved bookings.

Some advice when Creating a New Session

If you start to set up a new session with the date, venue etc, then come out of that screen without saving the details or cancelling them (e.g. you just click on 'Home'), WILMa does actually save the details, creating an 'inactive' session.

This inactive session can only be seen if you search under Classroom Comment block/Sessions /View Sessions. However, when you click on the course title, it takes you to the course homepage but that session is not listed, even if you search on 'Any' under 'Previous Sessions'. This means that you cannot amend it but you can't delete it either.

If you then try to set up a replacement session, the venue is not available for selection as it is associated to the inactive session.

If you need to move out of the create a new session screen, please either save the details or cancel them to avoid this problem.

Issues with IE and Chrome

Please note: WILMa is currently supported by Internet Explorer 7, 8 or 9.   If you are using Internet Explorer 10, please switch on Compatibility mode, If you are using another browser (such as Google Chrome or Mozilla Firefox), you may experience problems while using WILMa.

Delegate names not appearing within the course report when trying to enter date for RPL field

It appears that this can occur when a user has not added themselves to a session, but an admin user has done this for them, so a footprint isn't created on their user for the course in question. Therefore they will not appear on the course report. Learning Pool's words were that essentially "the delegate hadn't enrolled onto the course" itself, even though as an admin I had enrolled them onto the session.

The way round this is to be within the course, click on 'users', under 'course administration', within the 'settings' box to left-hand-side; then click on 'enrolled users', click on 'enrol users' near the top of the page, search for the delegates name, and then click the 'enrol' by their name. You can do this for as many delegates as you like at once, it seems. Then click on 'Finish enrol users'. They will now appear within the course report, so you can fill out the RPL field.

Record of Learning and My Bookings

In the 'Record of Learning' on some delegates whom have the booking status of 'No Show', 'Valid No Show' and 'Partially Attended' on courses, the 'Progress box' is full and there is a 'Course Completion' date within there. The reason for this was because originally the pass grades on all our courses was set to 49.9%. These have since changed to 100%.

It has been confirmed everyone whom has the booking status of 'No Show', 'Valid No Show' does not have the 'Progress Box' full and there is no 'Course Completion Date' there within the 'Record of Learning'. Anyone with the booking status of 'Partially Attended' has the

'Progress Box' half full and there is no 'Course Competition date, within their 'Record of Learning'

After further investigate by LP and myself the issue around the 'Record of Learning' and 'My Bookings' not matching up is due to the following issues

a) The course code and course title is not the same within both the 'Course Title' and 'Session Name'. Please ensure that you use the same 'Course Title' and 'Session Name' in both of these fields

b) Please also note the only data that should be put within the RPL field is the date the course was completed. If you put any other data other than this in the field, this will mean on the delegates Record of Learning they will have a Course Completion Date and will be marked as 'Completed via rpl' when in fact they might have not completed the course at all.

Steps a delegate takes to complete the Evaluation form from the email

- The training would happen and then after this the trainer would send the register to the Administrator.

- Once the administrator gets the register they then mark the attendance.

- Once the attendance is marked WILMa automatically fires an e-mail to the delegates that are marked as 'Fully Attended' to do the evaluation.

- The delegate then opens the e-mail, clicks on the link and this then takes them to the evaluation form, they will be required to log into WILMa if you have not already done so.

- The delegate then clicks on the tab saying ‘Answer Questions’, completes the form and then clicks 'Submits Questionnaire'

Impact of Changing Course Gradings on Attendance Status

Please be aware: if you subsequently change a course grading (e.g. if you change from 49% to 100%), this may affect the attendance status of delegates.

I changed a course grading for one of my courses. There were two delegates who had previously recorded as 'Valid No Shows'. However, according to the 'course completion status', it showed that they had attended/completed the face to face session, which they hadn't.

If this happens to any of your delegates, you will need to contact Learning Pool to get the delegates' attendance status amended.

Updating text in automated emails

Whenever text for an event is updated within the language files for the automated emails, this will not change existing events but only for newly created events. To change the text for existing events would be a manual task.

It is the same for deleting text. If this was to be deleted them it would only affect newly created events and not existing ones.

Delegates' Special Requirements

When delegates book onto courses, they are asked whether they have any special requirements, e.g. dietary requirements, translator, etc. However, the only way course administrators have been able to see this information up until now is to download the register (with 'Special Requirements' as one of the fields selected for display). Due to concerns that registers may only be downloaded a few days before a course takes place, which may be too late to arrange certain requirements, e.g. translator. Learning Pool has now added a column to the face to face sign ups report to show the 'special requirements' for the delegates. From now on, when you run the report you should be able to see the special requirements (if applicable) for any user who has signed up.

Double Click when setting up Position or Organisation

If you are setting up a 'Position' or 'Organisation' in WILMa and click on the 'Save Changes' button more than once, this will mean duplicate entries will be added.

Please can you ensure that you click on the 'Save Changes' button once.

Running a report that identifies delegates that need a refresher

Please note if you wish to run off a report that identifies if a delegate has done a face to face course more than once you can you can do this via choosing 'Course Completion' as the source when creating a report.

If you wish to run a report to identify if a delegate has done a e-learning course and needs a refresher this cannot be done with reports.

However if this e-learning course has a quiz (**and only a quiz**) there is a way of getting this information by following the below instructions.

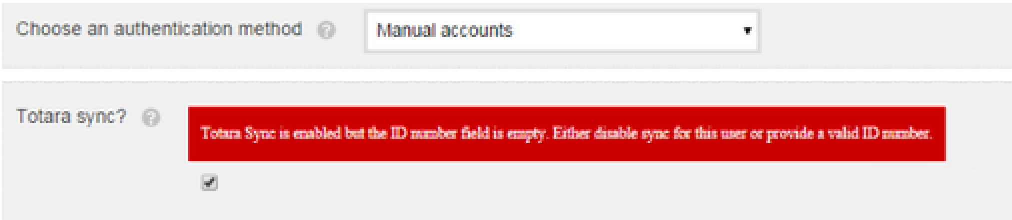
-Type in the 'Course Code' in Search Box eg) DS001
-Click on the course
-Click 'Quiz'
-Click 'Quiz' under the quiz you have already clicked on
-Click 'Attempts' which will have a number by it
-By 'Download table data as' click the downward arrow
-Click 'a microsoft excel spreadsheet'
-Click the 'download table data as'

You have all the data to state if delegates needs a refresher. You will need to do some filtering on this to get exactly what you need but it will do the job.

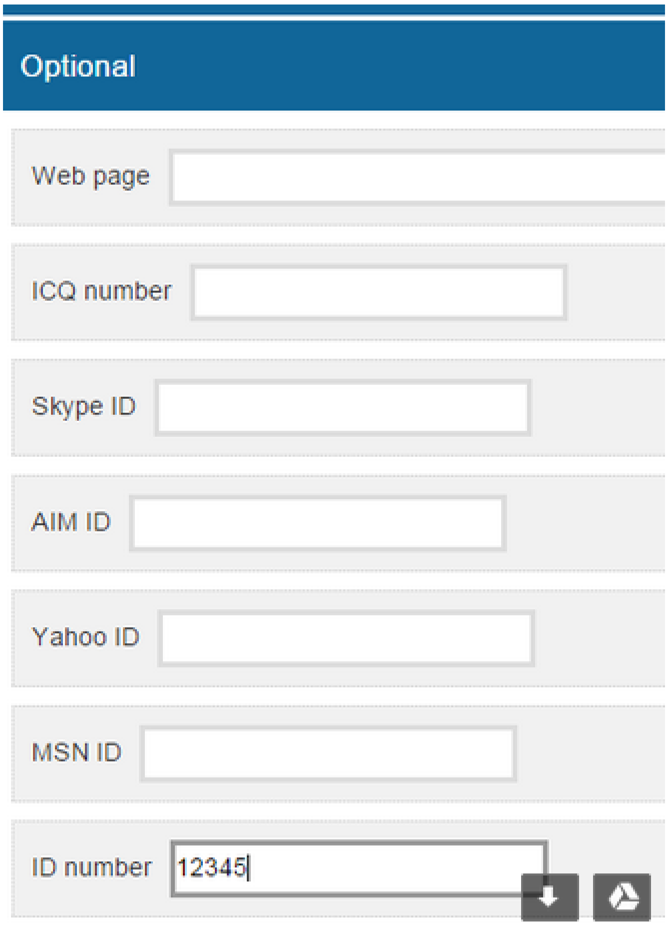
Please also note if you are downloading more than 6000 attempts you may have to download this in sections by the letters of the alphabet

Totara Sync

If you are adding the HRMS number to a delegates 'Username' (due to 'migrating' records together or adding the number to new schools staff not currently on WILMa) please note when you click the 'Totara Sync' button and click 'Update Profile' you will be shown the following error.



Please note you will also need to add the HRMS number in the 'ID Number' field which sits under 'Optional' in the same page of the 'Edit Profile'



This is a requirement within all the 2.5 LMS's. The daily HRMS upload automatically puts the information in the 'ID Number' Field

Certificates

Check all your courses to ensure that the course completion date is selected in 'Text Options' and that the logo, watermark, signature options in 'Design Options' are changed to No.

Creating Warwickshire County Council Delegates on WILMa (Agency Workers/Contingent Workers and Volunteers)

We are getting quite a few requests for Agency/Contingent Workers and Volunteers of Warwickshire County Council to be set up on WILMa.

If you do get any of these please check to see if they are already on WILMa first-hand.

If not please note you will need to find out the following information first from them before creating them on WILMa and confirming the username and password with them

- Name of Delegate:
- Position: (if position is not available in WILMa you will need to create this)
- Team Name: (if you cannot find the team name in WILMa **do not** create this, please check the Managers Team Name and assign the delegate under the same organisation)
- Managers Name:

Please do not set anyone up without all this information.

How to see who has created a delegate

In order to see from the logs who has created a user, you first need to run a report, under the source 'Users' that includes the User Creation time. Once you know this date and time, you can run the log report http://warwickshire.learningpool.com/report/log/index.php?id=1) just filter to the date the user was created on. Also set the action to "Add". You should then be able to match the time up from the creation time to the stamp provided within the log.

Setting up a New Starter

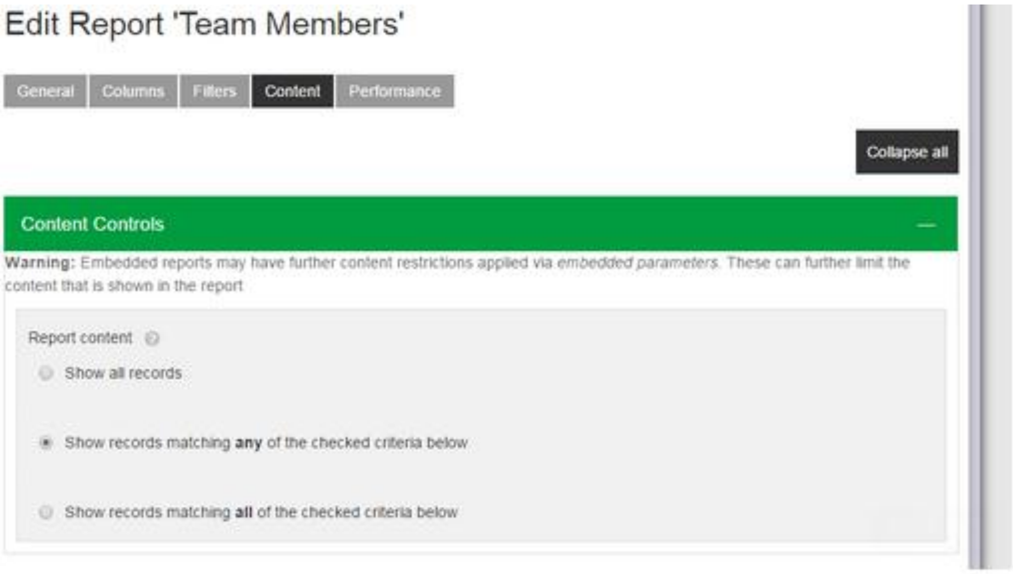
Just a reminder if you are setting up a delegate on WILMa, can you please check that the delegate is not already set up on WILMa already.

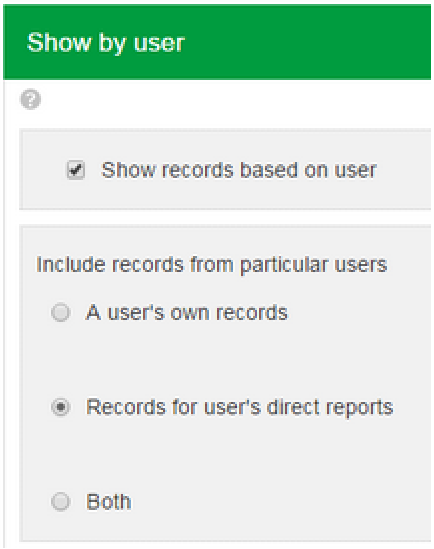
If you are setting up a new WCC starter that has not come through from HRMS into our WILMa please can you ensure that you make a note in your diary (week later or something) to check to see if the delegate has come through into WILMa from HRMS and then 'migrate' both records into one, deleting the inactive one. It may be quite useful when setting up a new WCC starter that has not got an active WCC e-mail account to set them up like the following frankspencer@newstarterdonotreply.com as its easier to recognise, when you need to 'migrate' both records.

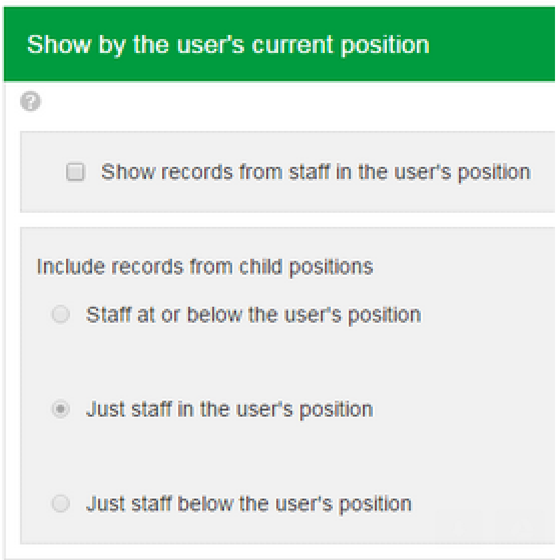
WILMa My Team report

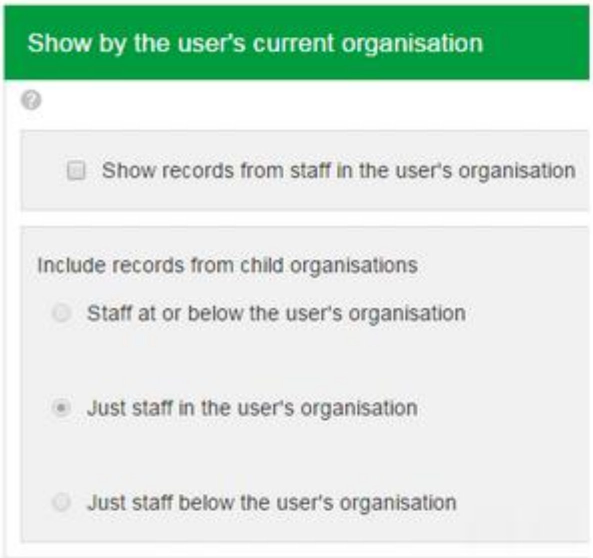
A Site Administrator or Learning Pool have accidentally clicked 'My Team', 'Edit this report', 'Content' and changed 'Show records matching **any** of the checked criteria below' to 'Show all records'.

Only Site Administrators or Learning Pool have access to do this, however this should not be edited or changed. The report should be set up as below:


Edit Report 'Team Members'
General
Columns
Filters
Content
Performance
Collapse all
Content Controls
Warning: Embedded reports may have further content restrictions applied via embedded parameters. These can further limit the content that is shown in the report
Report content
Show all records
Show records matching any of the checked criteria below
Show records matching all of the checked criteria below


Show by user
Show records based on user
Include records from particular users
A user's own records
Records for user's direct reports
Both


Show by the user's current position
Show records from staff in the user's position
Include records from child positions
Staff at or below the user's position
Just staff in the user's position
Just staff below the user's position



Delegate's manager pulling through on reports

A classroom connect session that was set up as' tutor approval', this means that delegates were able to book on without identifying a manager due to the nature of the course.

However, when running off a report to contact delegate managers this information was not pulling through, therefore please note that if you think its likely that you may need to contact a manager in the future, then you will need to ensure the course is set up as one/two stage approval.

Deleting Topic's

To remove topics complete the steps below:

- Go to each topic with editing turned on, removed all text from the summaries and the topic titles
- Then edited the course settings (http://warwickshire.learningpool.com/course/edit.php?id=628)
- Scrolled down to the 'Course Format' option
- Changed 'Number of Sections' from 3 to 1

Now when you add a new topic it will be blank and you can add any additional topics you require.

Non Attendance on WILMa

Since we've upgraded to 2.9, when taking attendance, the 'Valid No Show' option is no longer available, therefore can you now use the following process:

When taking attendance select 'No Show' for all those who didn't turn up for the course.
Send a non-attendance memo to the manager
When the manager has responded, if the reason is valid, remove the learner from the session giving the reason for non-attendance.
If there needs to be a charge, then leave the learner showing as a 'No Show' and add the details to the internal charging sheet.

WILMa 3rd Party requests queue

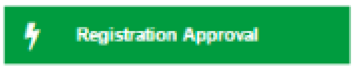
Please note that from now on when a user requests an account from the login screen an email will no longer be generated to the WILMa mailbox.

Whoever is on rota duty that day/week will need to regularly check the queue on WILMa to action requests.

To access the queue follow the instructions below:

Click the 'Admin' option on the menu bar at the top of the screen when logged in as a courseadmin account

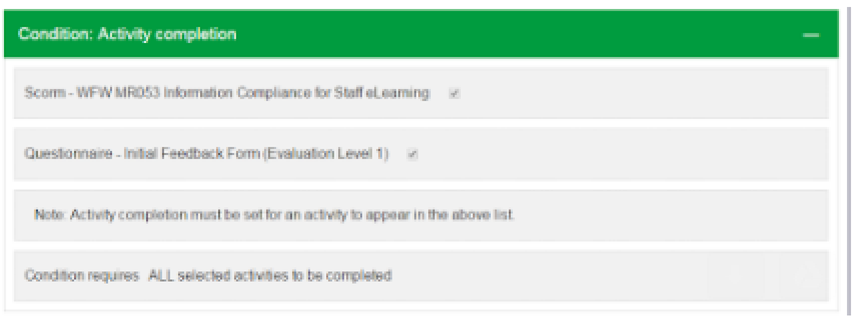
Click the 'Registration Approval' button on the left hand side of the screen



A list of outstanding requests will be displayed and need to be actioned from here

Completion Criteria

Please can you be mindful when setting up courses (eLearning or Face to Face) that you try and get the settings, especially the 'Completion Criteria' correct. For example



If however you need to change the 'Completion Criteria' on a course, after the original set up you must raise a ticket to support@learningpool.com as they would have to run what's known as the Historic Cron. This to bring back users original completions, otherwise they will only show the completion date of the day the course was unlocked by the admin that makes the change when clicking the below before changing the Completion Criteria.

RPL and Merging Duplicate Completed Courses

If you solely RPL a learner on a F2F course, this will not appear in there 'Past Bookings', as the RPL is designed only to mark an overall course completion and not the individual activities contained within it. It will however appear in there 'Record of Learning'

This is also the case with the current merging of records we do for completed and completed via rpl courses from a duplicate account into the active account. The F2F courses on the duplicate account will not appear in the 'Past Bookings' of the active account once the course completion report merge is run, but will appear in the learners in the 'Record of Learning'.