Absorb Leaders Training!

Learning Management System

Sun Health

Valerie

Please sign!

Valerie: Lets all take a minute and sign in! Insert in Chat: https://docs.google.com/spreadsheets/d/1-epLQTOKzIiUsF8STXVHKyyaFxgONbUqVaQkCzriHFc/edit?usp=sharing

Introductions: Absorb Leaders Training
(Learning Management System)

Valerie: I'd like to introduce Stephanie Hannon, Benefits and Learning Coordinator, my assistant, who will also be co-presenting today. We want to welcome you and say how much we appreciate you being here for this training. Today's topic is learning about the Admin side of Absorb for leaders, so you understand how to run reports on your team members progress for important classes such as our Sun Health Fundamentals (compliance classes).

and also how to toggle between the Learners Experience and the Admin area.

Stephanie: Thank you for joining us this morning. As Valerie said, there are 3 topics that I will introduce you to. Topic 1 Admin Role vs Learner Experience, 2. Running reports on Team Members that have taken classes and finally, 3. How to view Traliant classes, these classes are only available to some leaders. At the end of this training you will be able to run a report on the compliance classes.

Valerie will be presenting on her monitor both the ppt and the Absorb screen. For this training, I will show you in the upcoming slides how to log onto the Admin Absorb website and follow along with us,

TOPIC 1: Admin Role vs Learner Experience!

Leader have 2 Absorb Accounts:

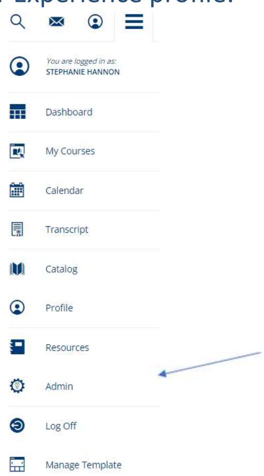
1. **Learner - Personal**
2. **Administrative**

Sun Health

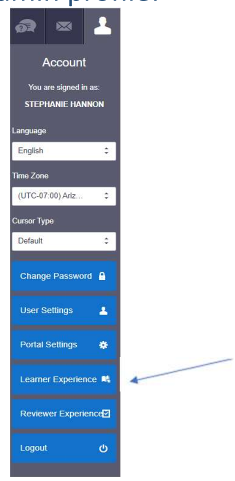
Let’s begin with understanding the differences between an Admin Role vs a Learner Experience. The Learner Experience is when you log into your own personal Absorb profile and you can ONLY see your profile and classes YOU have taken or that YOU have enrolled in. To log into your Learner Experience profile you would go to your browser and type **sunhealth.myabsorb.com/#/login.** Just as the title says... You are the Learner and this is YOUR experience. Versus your role as a leader, you also have an Absorb Admin profile and to log into that profile, go to your browser and type **Sunhealth.myabsorb.com/admin/login** and you will use your same username and password as you used when you logged into your Learner Experience profile. This is commonly known as a "single sign-on". It is my recommendation that you bookmark at least "one" of these login URLs and I am going to show you why!

TOPIC 1: Admin Role vs Learner Experience!

Learner Experience profile:



Admin profile:



Sun Health

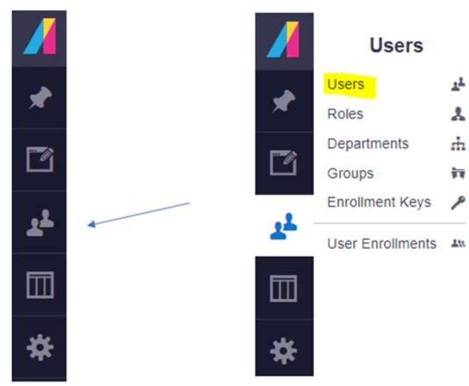
You have the capability of toggling between both of your Absorb profiles. Let's see how this works. <Valerie start showing Website>

When you manually log into your Absorb Learner Experience profile, you will go to the upper right corner and click on the Hamburger, it will provide you a drop-down menu and you will scroll down and see Admin. Click on Admin, it will **automatically** sign you in to your Absorb Admin profile, notice the URL browser name has changed to Admin. Vise versa, while logged into your Absorb Admin profile, go to the upper right corner and click on the single silhouette, it will provide a drop-down menu and you will see Learner Experience, click on that and Absorb will **automatically** sign you into your Absorb Learner Experience profile. We call this toggling between two sites/accounts. EASY-PEASY! **<Valerie will talk about the Learner Experience>**

TOPIC 1: Admin Role vs Learner Experience!

Once logged into your ADMIN account, to find a particular Team Member, click on the double silhouette on the left side of the page.

Then click on "Users". You will see all Team Members for "your" specific community (ADMIN, GVT, LLV & TC)



Sun Health

For the remainder of this training, we will be in your Absorb Admin profile. In this Admin profile, you will be able to see all of the **"Active"** Team Members specific to your location ONLY, unless you are a Super Admin (example of Super Admins a: Valerie, designated IT team members, and myself). In Absorb we have 4 locations ADMIN, GVT, LLV & TC.

In addition to seeing your Team Members, you will have the capability seeing the classes and running reports for the status of the classes on your Team Members to see if they have either COMPLETED, or classes are still PENDING or they have Not STARTED.

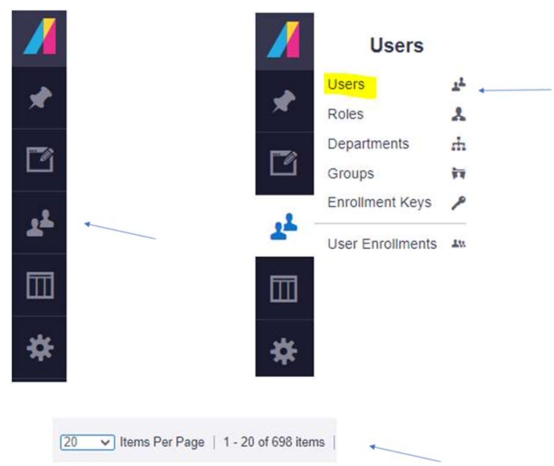
In additional, as it relates to classes being offered, Absorb has a 3rd party vendor called Traliant. These classes are only available to some leaders to enroll into. Valerie: Briefly Talk about Traliant Classes later during this presentation.

Let's begin by viewing your Team Members. To view all of your Team Members, look to the left of your screen, you will see a double silhouette, and if you hover over it, it will say "Users". Click on **Users** and it will provide you with a menu and you will need to click on "Users" again. This will pull up all **"Active"** Team Members that are associated to your location. Easy.. Huh:-)

TOPIC 1: Admin Role vs Learner Experience!

To expand your view per page, go to the bottom left-hand corner of the page and you will see "Items Per Page" click on down arrow. This is the view of how many Team Members you can see on the page (example: 10, 20, 50, 100).

From there you can scroll and find the Team Member.



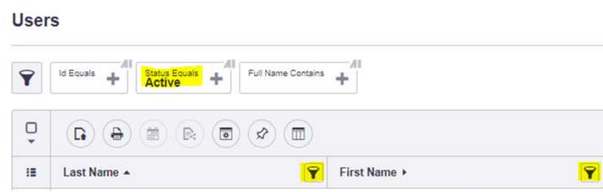
Sun Health

You can increase the items per page of the Team Members by going to the bottom, left hand corner of the page and click on the down arrow next to **"Items Per Page"** and it will give you the amount of names (i.e. 10,20,50,100, up to 1000)that you can view. From there, you can scroll down to find your Team Member. For this presentation Cinderella is logged in as a leader…. (SHE is Not a Super Admin) So Valerie's screen represents what a leader will see…. If you are a HRC or Super Admin, you may have more bells and whistles available to you.

TOPIC 1: Admin Role vs Learner Experience!

To look up a specific Team Member, you can sort by Last Name or First Name by clicking on the filter icon (you can search by any field that has the filter icon by it, as long as you know that information.)

The filter option will then bring up the screen to type in their name according to how you wanted to search (by either Last or First name)



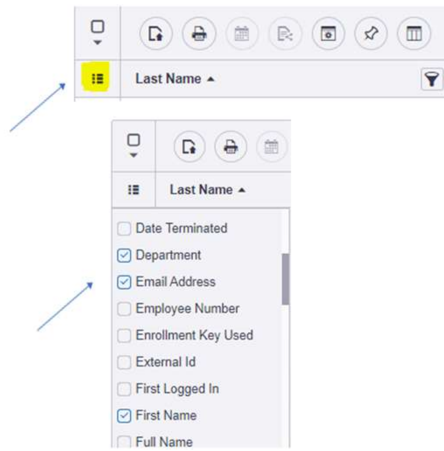
Sun Health

You also have the capability of viewing a specific Team Members. Absorb defaults to Status Equals **"ACTIVE"** which means you ONLY see "Active" Team Members in this list (by the way, "active" in Absorb means that they are an "active" Team Members in Kronos.) If they are terminated in Kronos, they should be "Inactive" and you should not see them in this Absorb list).

TOPIC 1: Admin Role vs Learner Experience!

Let's say you want to change the view of how your Team Members are listed.

Click on the Hamburger ≡ next to the Last Name field. It will give you a drop-down list of the views you can delete or add to your view.



Sun Health

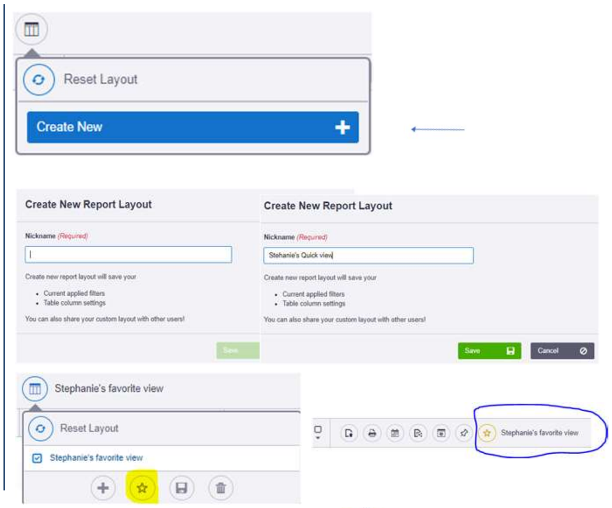
Let's say you want to change the view of how your displayed columns look, click on the Hamburger... as we will say "pickles on the side", which is next to Last Name (if you hoover over the icon, it will say "Display Columns"). A drop-down menu will appear and you can select all of the items you want displayed. <Valerie will discuss this.> Then click any open area on the page.

TOPIC 1: Admin Role vs Learner Experience!

Another nice thing about Absorb is that you can choose to save this view by clicking on the "Selected Report Layout button 

Click on "Create New".
Name your view.

Then click on the green "Save" bottom.



Once you have your favorite view, another great feature about Absorb is that you can save this view so every time you log in.   You do this by clicking on the "Report Layouts", which is the button right above First Name. Once you click on that, you will see a blue "Create New" box, click on that and you will create a "Nickname" of your customized view, then click on the green "Save" button. You can take this a step further, to make this a view of your choice every time you log into Absorb by going back into your "Selected Report" button, you will see your Nickname and you will click on the "Star" and Absorb will save is as a "favorite view".

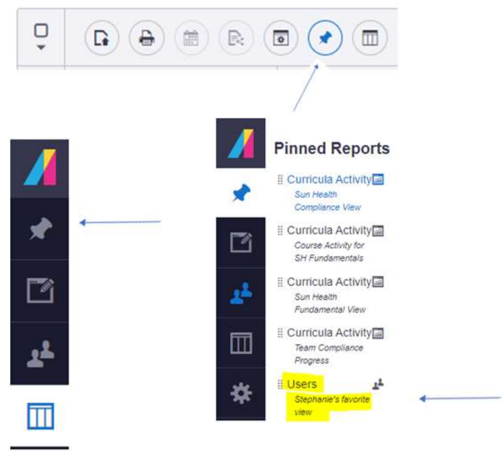
To test this, click on the multi-colored Absorb logo in the upper left-hand corner and it will bring you to your "Welcome Dashboard" screen, click on the double silhouette on the left, click on "Users" and it will pull all of your Team Members in the view that you saved as a Favorite.

TOPIC 1: Admin Role vs Learner Experience!

Another nice feature is that you can pin this view by clicking on the "pin" button.

To display your pinned views, look to the left and you will also see a "pin", click pin to display "Pinned Reports" and look under Users to see your named view.

** Remember, this report is ONLY the view of the Team Members at your Community.**



Sun Health

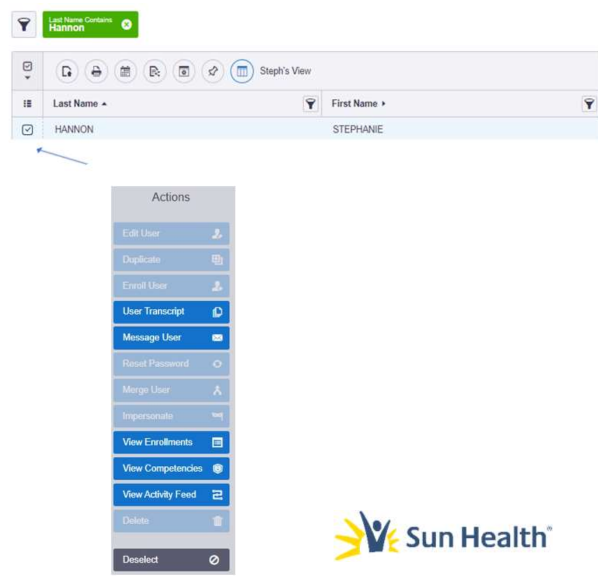
Another way you can save your Team Member's view is to "Pin" it. To Pin a Favorite display of your Team Members, you click on the PIN icon that is before the "Starred" icon (Your "Star" button will be yellow). This will turn you "Pin" blue. To see your "pinned" view, look to the left of your screen, you will see a "Pin" icon, click on that pin and it will pull up a "Pinned Reports" menu and you will see you the "User" view that you named and pinned.

ALSO – For quick access to the list of your Team Members in your customized favorite view, when you login you can also go directly to the "PIN" icon on the left-hand side, click on that icon and it will pull up a "Pinned Reports" menu and you will see "Users" near the bottom and the Nickname of your customized display view that you made a favorite, click on that your favorite view and Team Members will come up. AWESOME! If you see the pointer turned into a hand, that indicates you being able move the pinned views up and down.

This Display bar is available on almost most options within Absorb!

TOPIC 1: Admin Role vs Learner Experience!

Here are the “Action” views you can see about your Team Members.



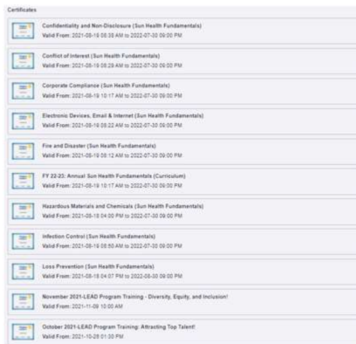
Sun Health

Now that you can see your Team Members in your preferred view, let's click on a Team Member and see what "Action" options you have to view with that Team Member. There are multiple ways you can filter your Team Members. One way is to use the "Filter" buttons , (ie. A filter button next to **LAST NAME**, **FIRST NAME**, **USERNAME**, and **DEPARTMENTS**.) Let's filter by Last Name, to do this, you will click on the filter icon next to "Last Name" and a window will open and you will type in the last name in the 3rd blank box, then you must click on "Add Filter" (the "Enter" key does not work in this function) and your Team Member should show below. **<Valerie is going to explain other ways of filtering by catagories>**

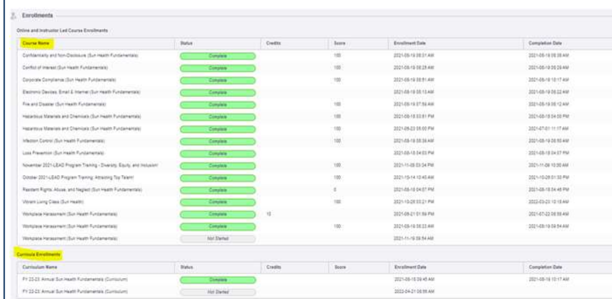
Now let’s select a Team Member. You will see Action items available for your view on the right hand side.

TOPIC 1: Admin Role vs Learner Experience!

View "User Transcripts" with certificates



View "Courses" and view "Curricula" enrollments



Sun Health

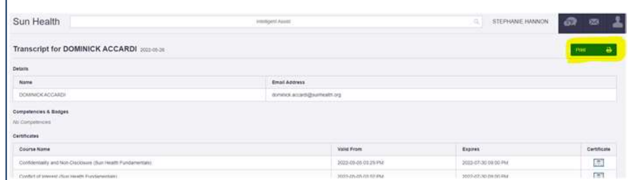
For this training, we will focus on **User Transcript** and **View Enrollments**. Let's click on "User Transcript“ for that Team Member. This is where you can view certificates for courses taken and view completed or not started of Curricula Enrollments. **Course** is commonly known as a class, **"curriculum"** is comprised of 2 or more "courses", **"curricula** is plural for "curriculum. An example of a "course" is Conflict of Interest, which is part of the **FY 22-23: Annual Sun Health Fundaments** "curriculum", which embodies 10 courses.

Under User Transcripts you will see Profile and a section called Completions and under Completions you will see any "Certificates" that the Team Member earned from "courses" that were taken. A little further down, you will see a section called "Enrollments" and "Online and Instructor Led Course Enrollments". These are courses that your Team Member have competed OR have not started. Looking down even further on the page, you will see "Curricula Enrollments". If a Team Member has enrolled into a "curriculum" all of those courses will show up under the "Online and Instructor Lead Course Enrollments" individually. IF a Team Member does not complete all of the courses in that Curriculum, it will NOT show up Completed in "green" until all of those courses have been completed for that Curriculum.

This becomes important to you because the **"FY 22-23: Annual Sun Health Fundaments"** curriculum is what we are needing all of our employees to complete... COMPETELY!! So under User Transcripts, you should scroll down to the bottom of the page under Curricula Enrollments and you should see **"FY 22-23: Annual Sun Health Fundaments"** and it should say "Complete" in green! That is how you know that your Team Member has completed that curriculum.

TOPIC 1: Admin Role vs Learner Experience!

You can also Print Transcripts

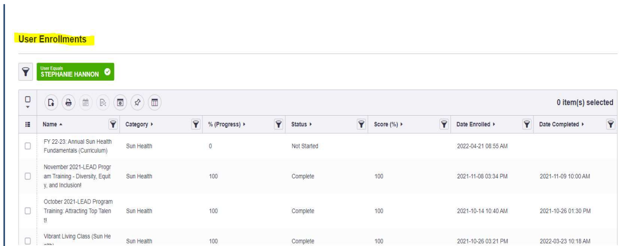


Sun Health

You can print transcripts by looking to the right and click on the Print Transcripts blue button and it will pull up another web browser screen and you would click on the printer button, which is in the upper right corner. To exit out of this screen just close out this browser screen and it will bring you back to the User Transcript page.

TOPIC 1: Admin Role vs Learner Experience!

You can also View Enrollments



Sun Health

For the sake of time, we will not go over all of the User Transcript options, however, we will glance at the “View Enrollments”. Here is where you will see all of the “courses” and “Curriculum (or curricula) the Team Member has enrolled in.

Again... the Display bar is available for your use. This ends topic 1

TOPIC 2: Run a Report on Team Members Classes

All Sun Health Leaders have roles built into their Absorb Admin profile.

One specific role that leaders have is to be able to run reports on your Team Members.

You must log into your Absorb Admin account.

Sun Health

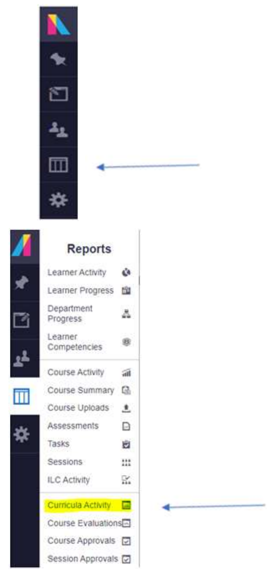
Now we are getting into the "meat and potatoes" of YOUR role as a leader in Absorb, specifically during this compliance season of Sun Health. We will show you how to run a report to keep up with the progress of your Team Members as they have either Completed, still PENDING or have not started their Sun Health compliance classes.

Let's begin....Make sure that you are in your ADMIN profile.

TOPIC 2: Run a Report on Team Members Classes

Once you have logged into your Admin account, look to the left side and you will see an icon called Reports .

Click on that icon and you will see an option called "Curricula Activity"



Sun Health

On the left-hand side, click on the 4th greyed icon down which looks like a file container, if you hover over it, it will say "Reports". Once you click on the Reports icon, it will pull up a menu of several reports you can run. You will notice a "Course Activity" and a Curricula Activity. The difference is **Course Activity** means viewing or running a report on "1 specific" class, versus **Curricula Activity** are multiple Curriculums (remember multiple courses bow-tied into 1 curriculum.) For our training and the report that you will monitor and run will be in the "Curricula Activity“.

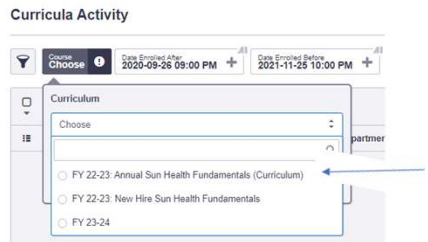
TOPIC 2: Run a Report on Team Members Classes

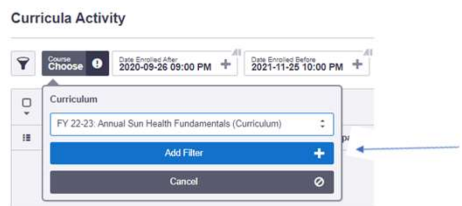
You will need to choose a curriculum by clicking on the box Course Choose .

Click on the down arrow and select "FY 22-23 Annual Sun Health Fundamentals (Curriculum)"

Then click on "Add Filter“

Deadline for Sun Health Fundamentals Classes:
May 2nd-July 31st





Sun Health

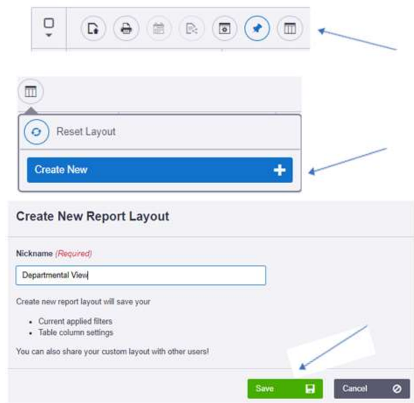
Under "Curricula Activity", you will see a grey box that says "Course Choose", click in that box (do not click on the filter next to the box). It will pull up a Curriculum box and you will choose a curriculum. For our purpose **FY 22-23 Annual Sun Health Fundamentals (Curriculum)**, click on "Add Filter" (remember, the "Enter" button does not work!). Again... This will pull up all the users that are in your community that are required to complete the Sun Health Fundamentals. You will see the default view of your team members and their curriculum progress, (ie. Names, Dates Completed, Attained Certificates, Certificate Date, Status and Progress). The HRBP will be explain why we are selecting this curriculum...**(PAUSE FOR HRBP)…….**

TOPIC 2: Run a Report on Team Members Classes

Once you have the view to your liking, click on the "Report Layout" button.

then...

You want to name this view by clicking on the "plus" sign next to "Create New" and name the view.



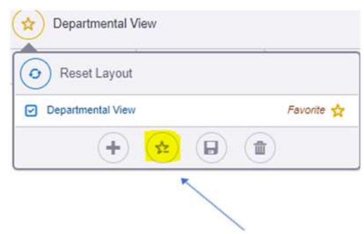
Once you have your preferred Displayed Columns, you can save this view by clicking on the "Report Layouts" button (which is again over the First Name column), click on :"Create New" and type in the Nickname of the view, then click on the green "Save" button.

TOPIC 2: Run a Report on Team Members Classes

Once you have the view to your liking, you can also make it a "Favorite".

Making this a favorite means every time you log into Curricula Activity, that is the view that will come.

If you have multiple views named, you can only make 1 view a favorite.



Sun Health

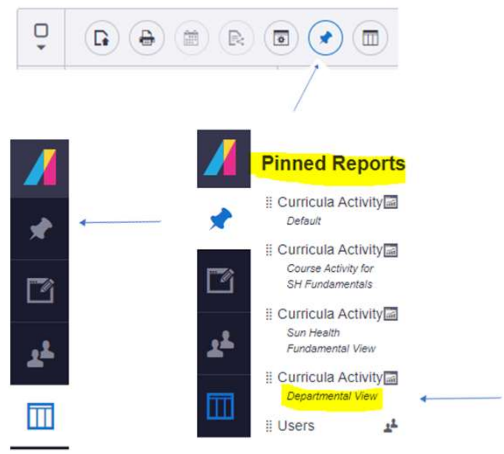
Again, to make this your FAVORITE view, go back and click on your "Report Layout" button again (which at this point it should have your "Nickname" next to it), and it will show the Nickname of your customized displayed view with a check box next to it. Click on the "Star" button. Hint: By saving this view as a Favorite, when you go back into this Curricula Activity report, it will automatically take you to this FAVORITE display view. Does that make sense?

TOPIC 2: Run a Report on Team Members Classes

You can pin this view by clicking on the "pin" button.

To display your pinned views, look to the left and you will also see a "pin", click pin to display "Pinned Reports" and look under Curricula Activity to see your named view.

** Remember, this report is ONLY the view of the Team Members at your Community.**



Sun Health

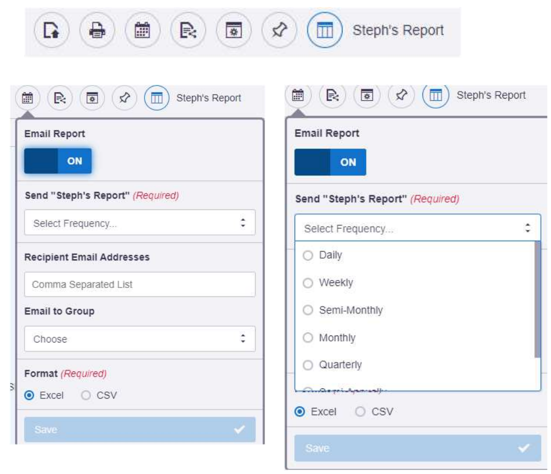
AND...., As a reminder, you can Pin this report by clicking on the "PIN" icon that is next to the "Star" icon. To see your "pinned" report, look to the left of your screen, you will see a "Pin" icon which is under the multi-colored Absorb icon. Once you click the "Pin" and it will pull up a "Pinned Reports" menu and you will see your "Nickname" report under "Curricula Activity".

ALSO – If you are logging into your Admin account, you can go directly to the "PIN" icon and you will see "Pinned Reports" and your Nicknamed report will be under "Curricula Activity". (Notice that ALL of your pinned views will be under the report location, which makes it nice to go directly to that report/view). Click on the Nickname and it will bring up the report AND the view that you saved it in.....and it will have updated information of the progress of your Team Members classes.

TOPIC 2: Run a Report on Team Members Classes

You can also schedule a report to run by clicking on the Schedule Report icon . In order to use this button, you must first save your view, then the calendar icon will be available.

Click on the OFF button to turn this option ON and follow the prompts.



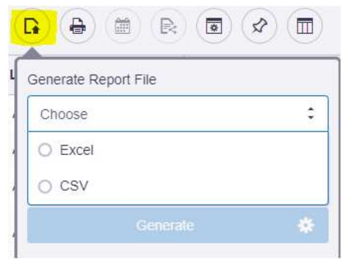
Sun Health

You can also schedule and set the frequency on how often you want your report to run… Daily, Weekly, Semi-monthly, etc. You MUST save your view of this report FIRST so that the calendar icon becomes available to you. You do this by clicking on the calendar icon on your display bar, 3rd icon from the left. Once you click on it, that will bring up a drop-down menu, where you would click on OFF button to turn it ON and basically follow the prompts… Select the Frequency, you must know the email address to send the report to and then click on how you want it to send, via Excel or in a CSV file. Then click on the "blue" Save button.

TOPIC 2: Run a Report on Team Members Classes

You can Print this report by clicking on the Printer icon then follow your printer settings.

Additionally, you can download the report by clicking on the Paper icon next to the printer button and the Generate Report file displays and you can generate the report an Excel or CSV file. The click on Generate



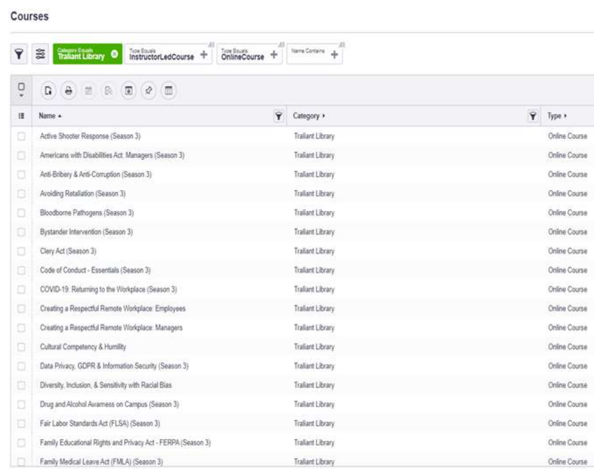
Sun Health

<Valerie will talk about the Generating Report wheel>

Ladies and Gents, this is how you run a report and now Valerie will go into Traliant.

TOPIC 3: Traliant Courses

Traliant Courses



Sun Health

Questions

Sun Health®

THANK YOU!