

As a recommended practice, rosters for future instructor-led learning activities should be generated the day prior to the scheduled event. It is a best practice to process ILT rosters the same business day (if possible), or within three business days.

Roster management in myTraining consists of two different processes:

- Generating rosters for future instructor-led learning activities
- Processing rosters for completed instructor-led learning activities

**NOTE:** This instruction guide is designed for administrators of the system, not those individuals designated as instructors. To access a roster, the user must have access to Administrator mode in myTraining with the necessary permissions enabled.

## Generating & Printing Rosters

- [Run Roster Report](#)
- [Manually Create Roster](#)

## Processing Rosters

- [Scheduled Activities](#)
- [Unscheduled Activities](#)

## Run Roster Report

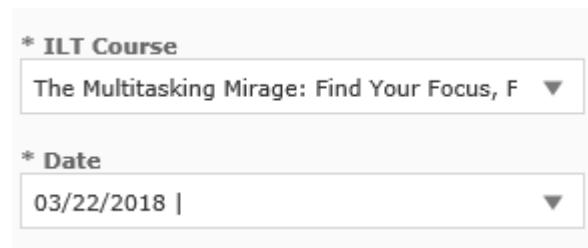
1. Go to [mytraining.hr.ufl.edu](http://mytraining.hr.ufl.edu), select the University of Florida option, log in with GatorLink credentials.
2. Navigate to **Self > Reporting > Advanced Reporting**.
3. Expand through the following folders: **mytrainingufshands > Custom > UF > Departmental Reports > Training & Org. Development > Reports**.
4. Within the Reports folder you will see several reports. The following two reports are used for ILT Class rosters:
  - **ILT Class Roster** (includes participant's UFID numbers)
  - **ILT Class Roster for Service Center** (does not include participant's UFID numbers)
5. Click on the title of the desired report.

**NOTE:** Click title to go directly to report: [ILT Class Roster](#) | [ILT Class Roster for Service Center](#)
6. Select the appropriate **ILT Course** from the drop down menu. The search box can be used to type in code or a partial title.



**NOTE:** New ILT Courses and sessions will not be available in this report until the day after being added to the system.

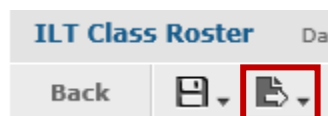
- Review the date populated in the **Date** drop down menu.



- Select **Apply**.
- The report populates with all **Registered** users. The last page will include a list of those on the **Wait List**, if applicable.

**NOTE:** This report includes live data within 3 minutes of the activity's roster being modified.

- Click the **export button** to print the report as a PDF.



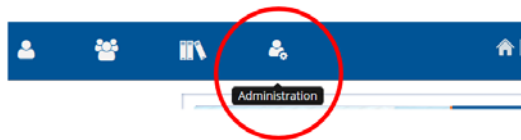
# myTraining Roster Management

## Manually Create Roster

This section demonstrates steps for copying and pasting roster data into a pre-defined Excel template that is used by UF Training & Organizational Development. If a customized roster template is desired, please ensure the following data fields are included:

- Activity name
- Activity code
- Start date
- End date (if different from start date)
- Start time
- End time
- Location (room and building)
- Instructor
- Participant UFID
- Participant name
- Participant signature

1. Obtain the roster template from the [myTraining Partner Program Toolkit](#) or use your own spreadsheet
2. Go to [mytraining.hr.ufl.edu](http://mytraining.hr.ufl.edu), select the University of Florida option, log in with GatorLink credentials
3. Click on **Administration**



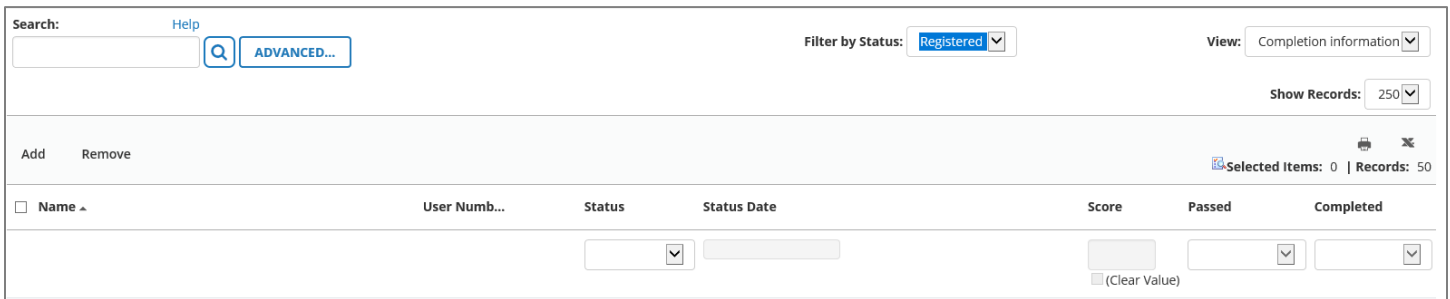
4. Navigate to **Learning Management > Activity Management > Learning Activities**
5. Search for the class and go to **Edit > Manage Roster**
6. Fill in the learning activity details (i.e. name, date, time, location, instructor, etc.) in the spreadsheet
  - Most learning activity details can be viewed on the search results screen

**NOTE:** Once all learning activity details have been filled in on the roster template, the next part of the process is to gather roster data and import it from myTraining into the roster template (i.e. names and UFIDs)

7. On the Activity Roster screen, change the “Show Records” dropdown menu to **250** (or any other number higher than that of the enrollment – this is to ensure all records are viewable)

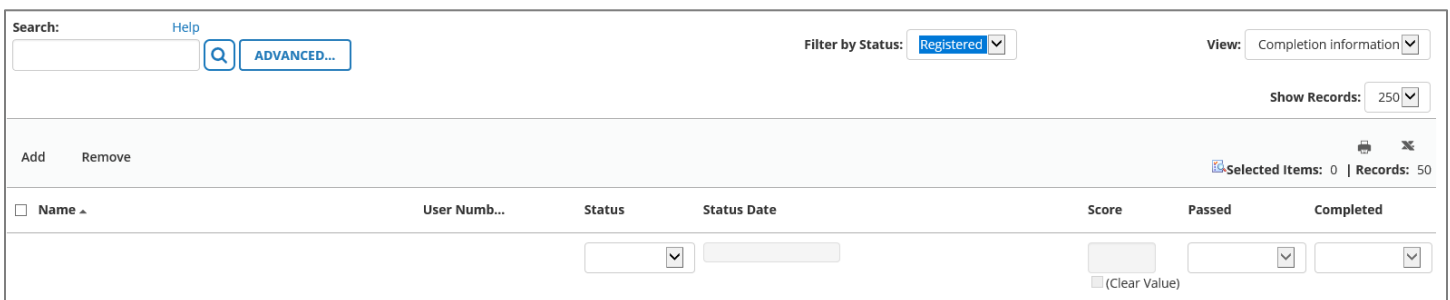
|                                 |                      |  |                                    |   |        |           |
|---------------------------------|----------------------|--|------------------------------------|---|--------|-----------|
| Search: <input type="text"/>    | <a href="#">Help</a> | <input type="button" value="ADVANCED..."/> | Filter by Status: <span>All</span> | View: <span>Completion information</span> |        |           |
|                                 |                      |  | Show Records: <span>250</span>     |   |        |           |
| Add Remove                      |                      | Selected Items: 0   Records: 55            |                                    |   |        |           |
| <input type="checkbox"/> Name ^ | User Numb...         | Status                                     | Status Date                        | Score                                     | Passed | Completed |

8. Change the “Filter by Status” dropdown menu to **Registered**



The screenshot shows the top section of the myTraining Roster Management interface. At the top left is a search bar with a 'Help' link, a search icon, and an 'ADVANCED...' button. To the right is a 'Filter by Status:' dropdown menu currently set to 'Registered'. Further right is a 'View:' dropdown menu set to 'Completion information'. Below these is a 'Show Records:' dropdown menu set to '250'. Below the search and filter area are 'Add' and 'Remove' buttons. On the right side, there are icons for printing and deleting, and text indicating 'Selected Items: 0 | Records: 50'. Below this is a table header with columns: Name, User Num..., Status, Status Date, Score, Passed, and Completed. The table body is currently empty.

9. Click the **Excel icon** to export the roster to Excel



This screenshot is identical to the one above, showing the myTraining Roster Management interface with the 'Filter by Status' dropdown menu set to 'Registered'.

10. For “Pages to Export” select **All pages**
11. For “File Type” select **Character delimited text**
12. Click **Next**
13. Click **File 1**
14. Click **OK**
15. The exported roster should open in a new tab or browser window
16. Access the new tab or browser window and select **Open** to open the Excel file
17. Highlight column A
18. Select the DATA tab and then select Text to Columns
19. Select **Delimited > Next**
20. In the Delimiters column, check the box next to Tab and Comma
21. Click **Next**
22. Highlight the User Number column and select Text for the **Column data format**
23. Click **Finish**
24. Resize all columns so all data can be viewed
25. Select data to be copied into the roster template and use CTRL + C to copy
26. Right click in the cell in the roster template to copy the data into, navigate to Paste Special and select **Values**
27. Once all registered participant information has been copied into the roster template, navigate back to the learning activity
28. Change the “View” dropdown menu to **Waiting list**

Search:  [Help](#)

View:

Show Records:

Add Move To Roster Move All To Roster Remove Remove All Send E-Mail

Records: 8

29. If there are no learners on the waiting list, no action is needed
30. If there are learners on the waiting list, their information needs to be added to the classroom roster (this can be done manually, or the waiting list can be exported to an Excel/CSV file, following the instructions above)
31. Indicate "Waiting List" at the bottom of the classroom roster:

|    |              |                |  |
|----|--------------|----------------|--|
| 56 | 87654321     | Jennifer Jones |  |
| 57 | 12345678     | Paula Roberts  |  |
| 58 | 12341234     | Jennifer Jones |  |
| 59 | Waiting List |                |  |
| 60 | 12312345     | Liam Hanson    |  |
| 61 |              |                |  |

32. Once all information has been added for registered and waitlisted learners (if applicable), print each roster (or save a local, electronic copy for activities being held off-site)
33. If multiple rosters need to be printed for the same day, use the breadcrumb trail to navigate back to learning activity search results:

### Processing Rosters – Scheduled Activities

For ILT activities that are scheduled in advance and made available for registration via myTraining, upon conclusion of the activity, rosters must be processed and attendance records updated. It is a best practice to process ILT rosters the same business day (if possible), or within three business days. The date on which an ILT roster is processed can impact the length of time the associated evaluation is available to participants.

#### [Roster is Processed on the Same Day of the Training](#)

#### [Roster is Processed One or More Days After Training Occurred](#)

#### Roster is Processed on the Same Day of the Training

1. Navigate to **mytraining.hr.ufl.edu > University of Florida** > log in with GatorLink credentials
2. Navigate to **Administration > Learning Management > Activity Management > Learning Activities**
3. Search for and locate the correct learning activity
4. Select **Edit > Manage Roster**
5. Change the “Show Records” dropdown menu to **100** to ensure all records are viewable
6. Change the **Filter by Status** drop-down menu to **Registered**.
7. Using the signed roster as a guide, verify the attendance status in myTraining:
  - For those participants with a status of “Registered,” that did **not** sign the roster, write ‘No show’ in the signature field on the printed roster.
    - Select the box next to the left of each name with ‘No show’ on the printed roster
    - Change the Status dropdown menu to **No show**
    - Click **Apply**
    - Click **Ok**
  - For those participants that did not sign the roster with a status of “Canceled,” write “Canceled” in the signature field on the printed roster (no action is needed for these records in myTraining)
  - For those participants with a status of “Registered,” that signed the roster, write ‘✓’ next to the signature on the printed roster.
    - Select the box next to the left of each name with a ‘✓’ next to the signature.
    - Change the following
      - Status dropdown menu to **Attended**
      - “Passed” dropdown menu to reflect **Yes**
      - “Completed” dropdown menu to reflect **Yes**
    - Click **Apply**
    - Click **Ok**
8. Verify the activity roster reflects statuses of registered, canceled, and no show only. Edit learner’s attendance status as needed.

9. Within the Activity Roster page, navigate to the “View” dropdown menu and select **Waiting list**

| Search:                                 |                | Help               |                         | ADVANCED...     |                         | View:         | Waiting list |
|---|----------------|--------------------|-------------------------|-----------------|-------------------------|---------------|--------------|
|   |                |                    |                         |                 |                         | Show Records: | 250          |
| Add                                     | Move To Roster | Move All To Roster | Remove                  | Remove All      | Send E-Mail             | Records: 6    |              |
| <input type="checkbox"/> Name           | User Num...    | Region             | Track                   | Status          | Waiting List Date       |               |              |
| <input type="checkbox"/> Joe Smith      | 12341234       |                    | Relationship Strategies | On waiting list | 3/7/2017 1:42:45 PM EST |               |              |
| <input type="checkbox"/> Joyce Robinson | 12385252       |                    | Relationship Strategies | On waiting list | 3/3/2017 9:57:14 AM EST |               |              |

10. Review the list:

- If there are no learners listed, proceed to **step 11**.
- If there are learners listed, determine if they are listed on the signed roster with a signature next to their name:
  - For participants who attended, select the checkbox next to each name and click **Move to Roster**
  - For those participants on the waiting list who did not attend, select the checkbox next to each name and click **Remove**
  - Once the waiting list has been cleaned up, navigate back to the “View” dropdown menu and select **Completion information**

11. If there are additional participants listed on the signed roster, click **Add**

12. Click **Continue**

13. Click **Add** in the “Available Users” section

14. By default, “Select viewable users” will be selected, it is okay to leave this as-is

15. Click **Next**

16. Enter the UFID or participant name in the Search field, click the grey “Go” arrow

17. Select the check box next to the correct participant’s name

18. Click **OK**

19. Repeat this process until all additional participants are listed in the “Available Users” section

20. Ensure all participant names are selected, then click the **top arrow** in the center of the page to move these records to the registration list

21. Click **Submit**

22. Select the box next to the left of each name with a ‘✓’ next to the signature.

- Change the following
  - Status dropdown menu to **Attended**
  - “Passed” dropdown menu to reflect **Yes**
  - “Completed” dropdown menu to reflect **Yes**

23. Click **Apply**

24. Click **Ok**

25. Click once in the Search box and select the Enter key on the keyboard to return to the complete activity roster

26. Change the “Filter by Status” dropdown menu to **Attended**

27. Ensure the “Records” number matches the number of signatures on the printed roster

28. If this number does not match, compare each participant name to the corresponding record in myTraining; once the discrepancy is located, update the attendance status in myTraining as needed and/or indicate this on the printed roster as well
29. Once the “Records” number in myTraining and number of signatures on the printed roster are congruent, submit the roster for scanning to the HR Assistant

### Roster is Processed One or More Days After Training Occurred

1. Navigate to **mytraining.hr.ufl.edu > University of Florida** > log in with GatorLink credentials
2. Navigate to **Administration > Learning Management > Activity Management > Learning Activities**
3. Search for and locate the correct learning activity
4. Click **Edit > Properties**
5. Click **Send to Stage**
6. Go to **Optional > Registration > Evaluations**
7. Evaluation Status
  - If there is no evaluation present, click **Cancel, Validate for Production**, and then **Move to Production** (not all trainings have an evaluation, so in that case there’s no need to configure evaluation properties). **Continue to Step 12.**
  - If there is an evaluation present, select the checkbox next to the evaluation name and click **Edit. Continue to Step 8.**
8. In the “Trigger offset” field, enter the number of days’ difference between when the activity was held and the date the roster is being processed (i.e. if the class was held on the 28<sup>th</sup>, and the roster is being processed on the 31<sup>th</sup>, the trigger offset value would be 3)
  - This value can be calculated by subtracting the class date from the current date, or simply by counting the number of days that have passed since the class was held, but not including the date the class was held in that count (i.e.  $31 - 28 = 3$ , from the example above)  
**NOTE: The vendor suggests we use a trigger offset of at least 3 even if there is a 1-2 day difference.**
9. Confirm the “Activity Evaluation date” reflects a date/time that is **prior** to the ILT Class start date. (If it is past this date, no one will receive an evaluation to complete)
10. Click **OK** and then click **OK** again
11. Click **Validate for Production** then **Move to Production**
12. Select **Roster**.
13. Change the “Show Records” dropdown menu to **100** to ensure all records are viewable
14. Change the **Filter by Status** drop-down menu to **Registered**.
15. Using the signed roster as a guide, verify the attendance status in myTraining:
  - For those participants with a status of “Registered,” that did **not** sign the roster, write ‘No show’ in the signature field on the printed roster.
    - Select the box next to the left of each name with ‘No show’ on the printed roster
    - Change the Status dropdown menu to **No show**
    - Click **Apply**
    - Click **Ok**
  - For those participants that did not sign the roster with a status of “Canceled,” write “Canceled” in the signature field on the printed roster (no action is needed for these records in myTraining)



- For those participants with a status of “Registered,” that signed the roster, write ‘✓’ next to the signature on the printed roster.
  - Select the box next to the left of each name with a ‘✓’ next to the signature.
  - Change the following
    - Status dropdown menu to **Attended**
    - “Passed” dropdown menu to reflect **Yes**
    - “Completed” dropdown menu to reflect **Yes**
  - Click **Apply**
  - Click **Ok**

16. Verify the activity roster reflects statuses of registered, canceled, and no show only. Edit learner’s attendance status as needed.

17. Within the Activity Roster page, navigate to the “View” dropdown menu and select **Waiting list**



The screenshot shows the 'myTRAINING Partner Program' interface. At the top, there is a search bar with a 'Help' link and a 'Search' button. Below the search bar, there are several action buttons: 'Add', 'Move To Roster', 'Move All To Roster', 'Remove', 'Remove All', and 'Send E-Mail'. A 'View' dropdown menu is set to 'Waiting list', and a 'Show Records' dropdown is set to '250'. The main table has columns for 'Name', 'User Number', 'Region', 'Track', 'Status', and 'Waiting List Date'. Two records are visible: Joe Smith and Joyce Robinson, both with a status of 'On waiting list'.

| Name           | User Number | Region | Track                   | Status          | Waiting List Date       |
|----------------|-------------|--------|-------------------------|-----------------|-------------------------|
| Joe Smith      | 12341234    |        | Relationship Strategies | On waiting list | 3/7/2017 1:42:45 PM EST |
| Joyce Robinson | 12385252    |        | Relationship Strategies | On waiting list | 3/3/2017 9:57:14 AM EST |

18. Review the list:

- If there are no learners listed, proceed to **step 11**.
- If there are learners listed, determine if they are listed on the signed roster with a signature next to their name:
  - For participants who attended, select the checkbox next to each name and click **Move to Roster**
  - For those participants on the waiting list who did not attend, select the checkbox next to each name and click **Remove**
  - Once the waiting list has been cleaned up, navigate back to the “View” dropdown menu and select **Completion information**

19. If there are additional participants listed on the signed roster, click **Add**

20. Click **Continue**

21. Click **Add** in the “Available Users” section

22. By default, “Select viewable users” will be selected, it is okay to leave this as-is

23. Click **Next**

24. Enter the UFID or participant name in the Search field, click the grey “Go” arrow

25. Select the check box next to the correct participant’s name

26. Click **OK**

27. Repeat this process until all additional participants are listed in the “Available Users” section

28. Ensure all participant names are selected, then click the **top arrow** in the center of the page to move these records to the registration list

29. Click **Submit**
30. Select the box next to the left of each name with a '✓' next to the signature.
  - Change the following
    - Status dropdown menu to **Attended**
    - "Passed" dropdown menu to reflect **Yes**
    - "Completed" dropdown menu to reflect **Yes**
31. Click **Apply**
32. Click **Ok**
33. Click once in the Search box and select the Enter key on the keyboard to return to the complete activity roster
34. Change the "Filter by Status" dropdown menu to **Attended**
35. Ensure the "Records" number matches the number of signatures on the printed roster
36. If this number does not match, compare each participant name to the corresponding record in myTraining; once the discrepancy is located, update the attendance status in myTraining as needed and/or indicate this on the printed roster as well
37. Once the "Records" number in myTraining and number of signatures on the printed roster are congruent, submit the roster for scanning to the HR Assistant

### Processing Rosters – Unscheduled Activities

It is not uncommon for trainers and/or departments to schedule instructor-led training that is not made available for registration, in advance, via myTraining. Training Administrators are usually made aware of this type of training activity when the roster arrives to be processed. Since there was no advance registration made available via myTraining, the activity itself must be created first, then attendance must be manually updated, based on the signed roster.

This guide does not include step-by-step instructions for creating ILT activities, please see the [Authors and Training Administrators Instruction Guide](#) for this information.

1. Once the ILT class activity has been created and located in myTraining, select **Edit > Properties**
2. Click **Send to Stage**
3. Go to **Optional > Registration > Evaluations**
4. Evaluation Status
  - If there is no evaluation present, click **Cancel, Validate for Production**, and then **Move to Production** (not all trainings have an evaluation, so in that case there's no need to configure evaluation properties). **Continue to Step 9.**
  - If there is an evaluation present, select the checkbox next to the evaluation name and click **Edit. Continue to Step 5.**
5. In the "Trigger offset" field, enter the number of days' difference between when the activity was held and the date the roster is being processed (i.e. if the class was held on the 28<sup>th</sup>, and the roster is being processed on the 31<sup>th</sup>, the trigger offset value would be 3)
  - This value can be calculated by subtracting the class date from the current date, or simply by counting the number of days that have passed since the class was held, but not including the date the class was held in that count (i.e.  $31 - 28 = 3$ , from the example above)

**NOTE: The vendor suggests we use a trigger offset of at least 3 even if there is a 1-2 day difference.**

6. Confirm the “Activity Evaluation date” reflects a date/time that is **prior** to the ILT Class start date. (If it is past this date, no one will receive an evaluation to complete)
7. Click **OK** and then click **OK** again
8. Click **Validate for Production** then **Move to Production**
9. Select **Roster**.
10. Click **Add**
11. Click **Continue**
12. In the “Available Users” section, click **Add**
13. By default, “Select viewable users” is already selected, it’s okay to leave this as-is
14. Click **Next**
15. Enter the UFID or participant name in the Search field, click the grey “**Go**” arrow
16. Select the **checkbox** next to the correct participant’s name
17. Click **OK**
18. Repeat this process until all additional participants are listed in the “Available Users” section
19. Ensure all participant names are selected, then click the **top arrow** in the center of the page to move these records to the registration list
20. Click **Submit**
21. Change the “Filter by Status” dropdown menu to **Registered**
22. Ensure the “Records” number matches the number of signatures on the printed roster
23. If this number does not match, compare each participant name to the corresponding record in myTraining; once the discrepancy is located, add the learner to the activity roster
24. Once the “Records” number in myTraining and number of signatures on the printed roster are congruent, select the **checkbox** to the left of the “Name” column header (this selects all items on the page)
  - o Change the following
    - Status dropdown menu to **Attended**
    - “Passed” dropdown menu to reflect **Yes**
    - “Completed” dropdown menu to reflect **Yes**
25. Click **Apply**
26. Click **Ok**

You are encouraged to keep the paper rosters for a certain amount of time in case there is any discrepancies with the myTraining data. The length of time is up to your department.

If you need help with...

Technical issues, contact the UF IT Computing Help Desk at 392-HELP or [helpdesk@ufl.edu](mailto:helpdesk@ufl.edu).

For additional help, please contact UF Training and Organizational Development at (352) 392-4626.