

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](#)

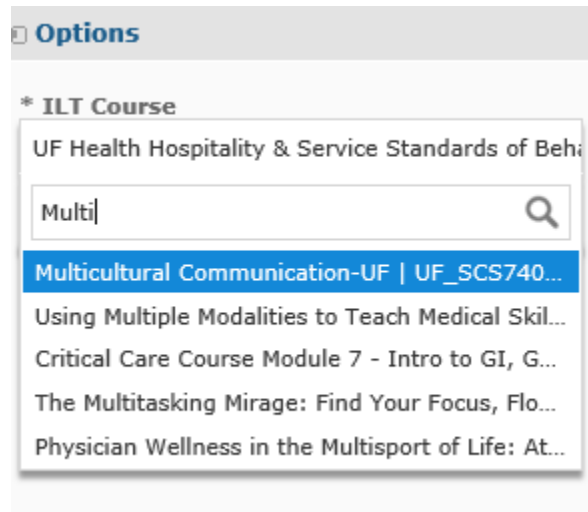
Processing Rosters

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

Run Roster Report

1. Go to mytraining.hr.ufl.edu, 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.

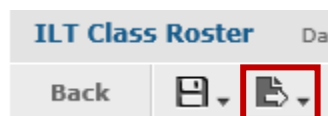
- Review the date populated in the **Date** drop down menu.



- 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

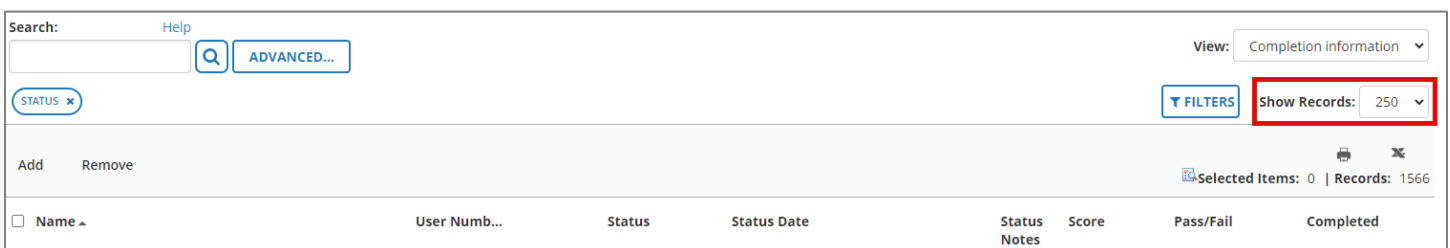
This section demonstrates steps for copying and pasting roster data into a pre-defined Excel template that is used by UF Training & Organizational Development. If a customized roster template is desired, please ensure the following data fields are included:

- 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, 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

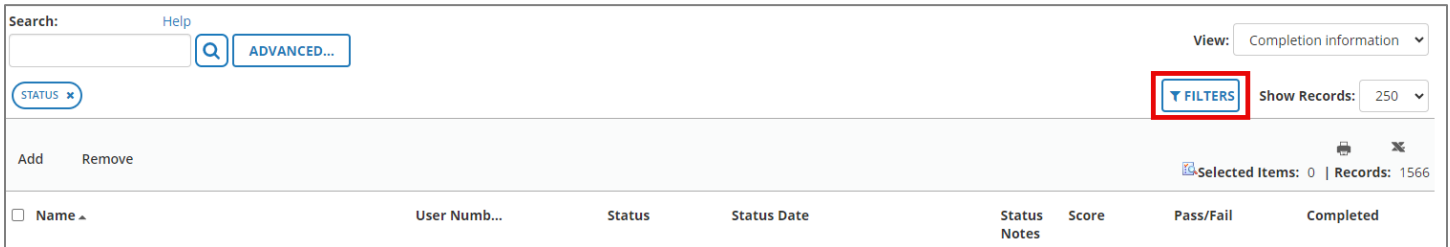
NOTE: Once all learning activity details have been filled in on the roster template, the next part of the process is to gather roster data and import it from myTraining into the roster template (i.e. names and UFIDs)

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)



The screenshot shows the myTraining interface for managing a roster. At the top, there is a search bar with a 'Help' link and a search button. Below the search bar, there are buttons for 'STATUS', 'FILTERS', and 'Show Records'. The 'Show Records' dropdown menu is highlighted with a red box and is set to '250'. Below the search bar, there are 'Add' and 'Remove' buttons. At the bottom, there is a table with columns for Name, User Num..., Status, Status Date, Status Notes, Score, Pass/Fail, and Completed. The table currently shows 0 selected items and 1566 records.

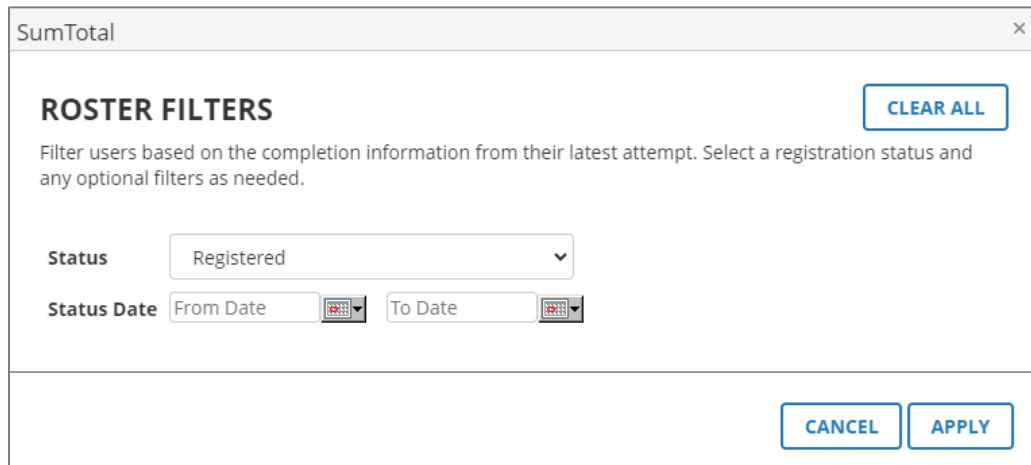
8. Click on **Filters**



The screenshot shows the top navigation area of the myTraining Roster Management system. At the top left is a search bar with a 'Help' link, a search icon, and an 'ADVANCED...' button. Below the search bar is a 'STATUS' dropdown menu. On the right side, there is a 'View' dropdown set to 'Completion information', a 'Show Records' dropdown set to '250', and a 'FILTERS' button highlighted with a red box. Below these elements are 'Add' and 'Remove' buttons, and a status bar showing 'Selected Items: 0 | Records: 1566'. At the bottom, a table header is visible with columns: Name, User Numb..., Status, Status Date, Status Notes, Score, Pass/Fail, and Completed.

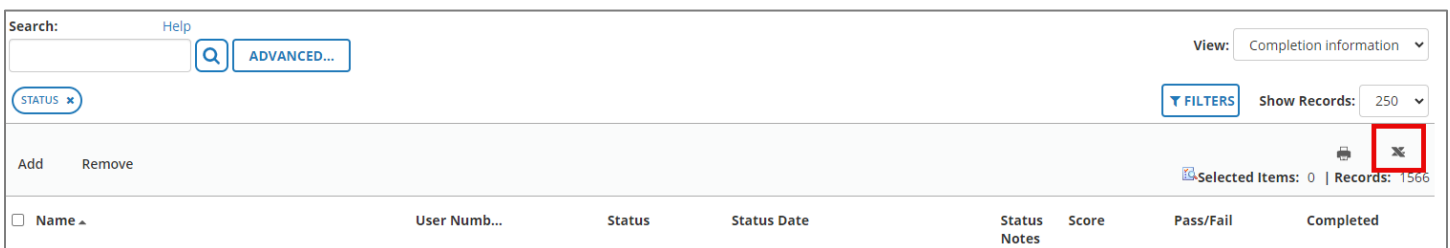
9. In the Status field drop-down menu, select **Registered**

10. Click **Apply**



The screenshot shows a 'SumTotal' dialog box titled 'ROSTER FILTERS'. It contains instructions: 'Filter users based on the completion information from their latest attempt. Select a registration status and any optional filters as needed.' There is a 'CLEAR ALL' button in the top right. The 'Status' dropdown menu is set to 'Registered'. Below it, there are 'Status Date' fields for 'From Date' and 'To Date', each with a calendar icon. At the bottom right, there are 'CANCEL' and 'APPLY' buttons, with the 'APPLY' button highlighted by a red box.

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



This screenshot is identical to the one in step 8, showing the myTraining Roster Management interface. The 'FILTERS' button is still highlighted with a red box. Additionally, the Excel export icon (represented by a small spreadsheet icon) is now highlighted with a red box.

12. For “Pages to Export” select **All pages**

13. For “File Type” select **Character delimited text**

14. Click **Next**

15. Click **File 1**

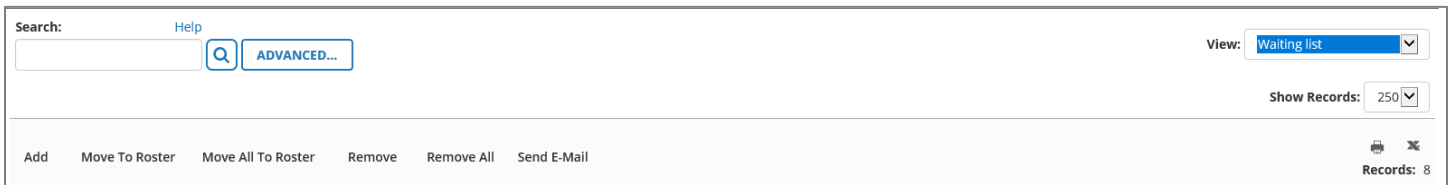
16. Click **OK**

17. The exported roster should open in a new tab or browser window

18. Access the new tab or browser window and select **Open** to open the Excel file

19. Highlight column A

20. Select the DATA tab and then select Text to Columns
21. Select **Delimited > Next**
22. In the Delimiters column, check the box next to Tab and Comma
23. Click **Next**
24. Highlight the User Number column and select Text for the **Column data format**
25. Click **Finish**
26. Resize all columns so all data can be viewed
27. Select data to be copied into the roster template and use CTRL + C to copy
28. Right click in the cell in the roster template to copy the data into, navigate to Paste Special and select **Values**
29. Once all registered participant information has been copied into the roster template, navigate back to the learning activity
30. Change the “View” dropdown menu to **Waiting list**



The screenshot shows the top section of the myTraining Roster Management interface. On the left, there is a search bar with a 'Search:' label, a 'Help' link, and an 'ADVANCED...' button. On the right, there is a 'View:' dropdown menu set to 'Waiting list' and a 'Show Records:' dropdown menu set to '250'. Below these are several action buttons: 'Add', 'Move To Roster', 'Move All To Roster', 'Remove', 'Remove All', and 'Send E-Mail'. In the bottom right corner, there are icons for printing and refreshing, and a 'Records: 8' indicator.

31. If there are no learners on the waiting list, no action is needed
32. 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)
33. 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			

34. 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)
35. 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. Click on **Filters**
7. In the Status field drop-down menu, select **Registered**
8. Click **Apply**
9. 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**
10. Verify the activity roster reflects statuses of registered, canceled, and no show only. Edit learner’s attendance status as needed.

11. 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		

12. Review the list:

- If there are no learners listed, proceed to **step 13**.
- 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**

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

14. Click **Continue**

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

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

17. Click **Next**

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

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

20. Click **OK**

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

22. 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

23. Click **Submit**

24. 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**

25. Click **Apply**

26. Click **Ok**

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

28. Click on **Filters**

29. In the Status field drop-down menu, select **Attended**

30. Click **Apply**
31. Ensure the “Records” number matches the number of signatures on the printed roster
32. 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
33. 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 28th, and the roster is being processed on the 31th, 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. Click on **Filters**
15. In the Status field drop-down menu, select **Registered**
16. Click **Apply**
17. 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**

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

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



<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

20. Review the list:

- If there are no learners listed, proceed to **step 21**.
- 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**

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

22. Click **Continue**

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

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

25. Click **Next**

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

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

28. Click **OK**
29. Repeat this process until all additional participants are listed in the “Available Users” section
30. 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
31. Click **Submit**
32. 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**
33. Click **Apply**
34. Click **Ok**
35. Click once in the Search box and select the Enter key on the keyboard to return to the complete activity roster
36. Click on **Filters**
37. In the Status field drop-down menu, select **Attended**
38. Click **Apply**
39. Ensure the “Records” number matches the number of signatures on the printed roster
40. 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
41. 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 28th, and the roster is being processed on the 31th, 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. Click on **Filters**
22. In the Status field drop-down menu, select **Registered**
23. Click **Apply**
24. Ensure the “Records” number matches the number of signatures on the printed roster
25. 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
26. 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)
 - Change the following
 - Status dropdown menu to **Attended**
 - “Passed” dropdown menu to reflect **Yes**
 - “Completed” dropdown menu to reflect **Yes**
27. Click **Apply**
28. 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.

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