Minerva Registration System User Guide for Course Administrators and Instructors

Last Updated: April 7, 2021

Contents

Introduction

The Minerva Registration system allows:

- Course administrators to manage their training courses, registration and reporting;
- Instructors to view their class schedule, class lists and course evaluations; and
- Employees to register for the training courses offered and track their training.

Log in to Minerva Registration (for course administrators and instructors)

1. Go to mcgill.ca/minerva.
2. Sign in with your McGill Username and Password.
3. Click **Training** tab to begin your course management or class preparation.

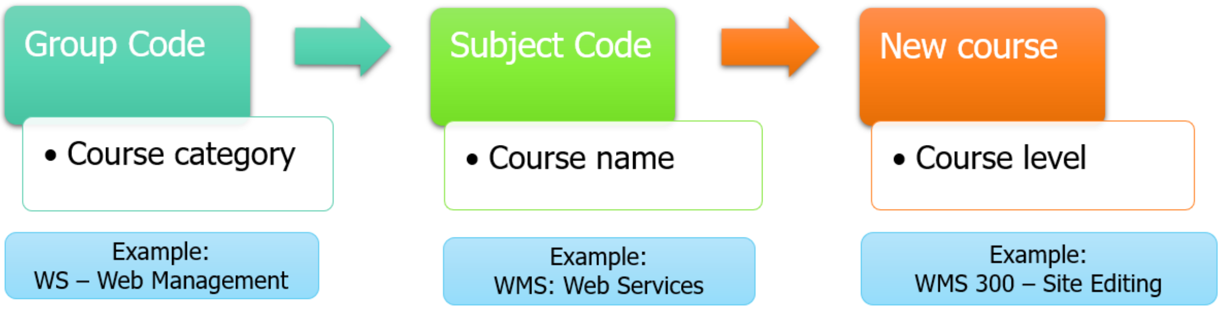
Log in to Minerva Registration (for employees)

1. Go to mcgill.ca/minerva.
2. Sign in with your McGill Username and Password.
3. Click **Employee** tab.
4. Click **Training Menu** link.
5. View and select which course to attend from the available groups (e.g. IT Services System, Organizational Development, Pension Management).
6. Follow the onscreen instructions.

Admin - Create a course

Overview of creating a course

The following is the overview on how to create your course:

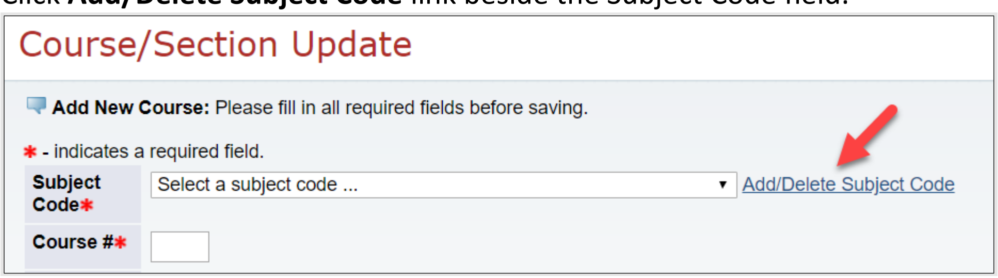


Group Code (Course Category)

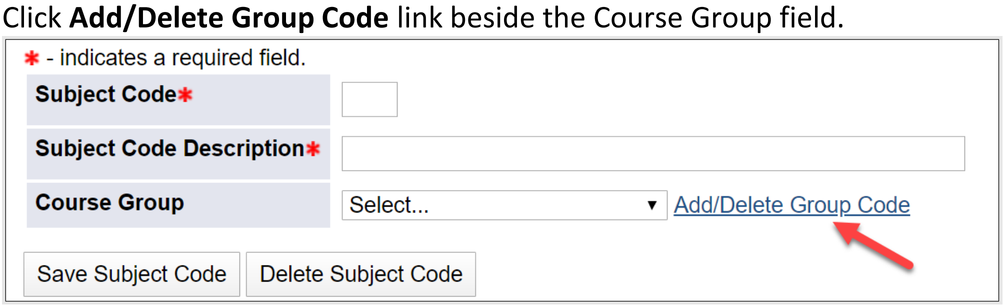
When you are creating a 'Group Code', you are creating a course category. For example, using 'WS: Web Management" as the Group Code is the main course category for any Web Management related courses.

Create a new group code

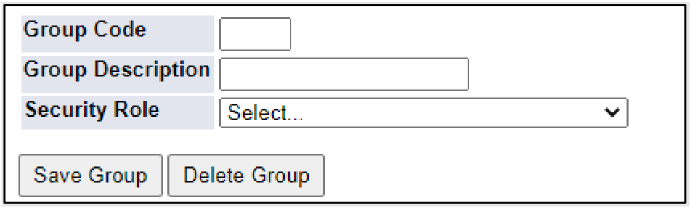
1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. Click **Add New Course**.
4. Click **Add/Delete Subject Code** link beside the Subject Code field.



5. Click **Add/Delete Group Code** link beside the Course Group field.



6. Above the list of already existing group codes, enter the following:
   a. **Group Code**: enter a 2-character code to represent the course category.
   b. **Group Description**: a brief title that describes this group.
   c. **Security Role**: Select your security group.

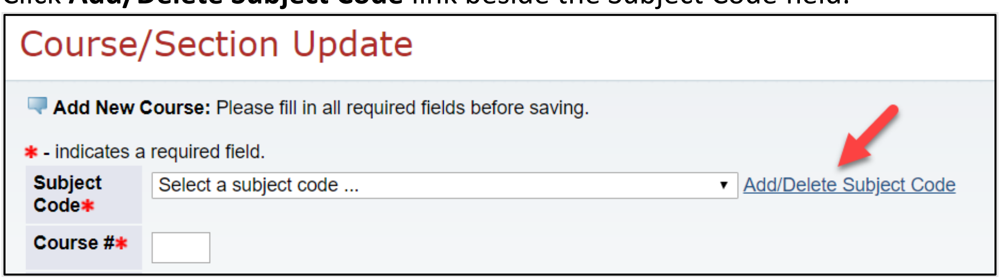


7. Click **Save Group**. Your action is confirmed.

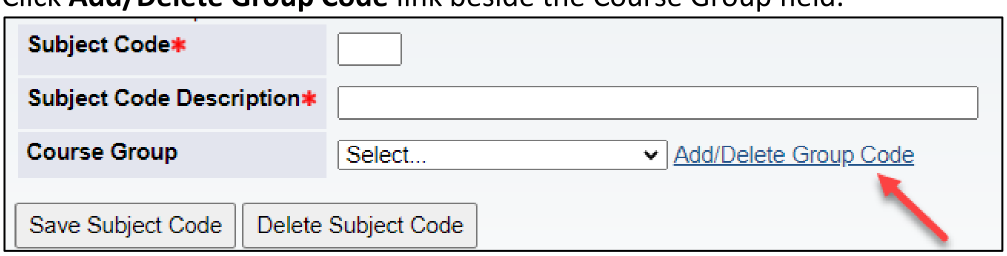
Warning: If the group code you entered is already in use, the system will automatically overwrite the existing one with the new Group Code Description and Security Group information you just specified.

Edit an existing group code

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. Click **Add New Course**.
4. Click **Add/Delete Subject Code** link beside the Subject Code field.



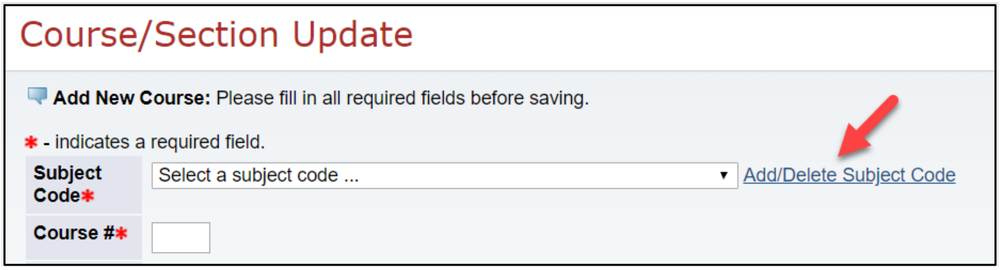
5. Click **Add/Delete Group Code** link beside the Course Group field.



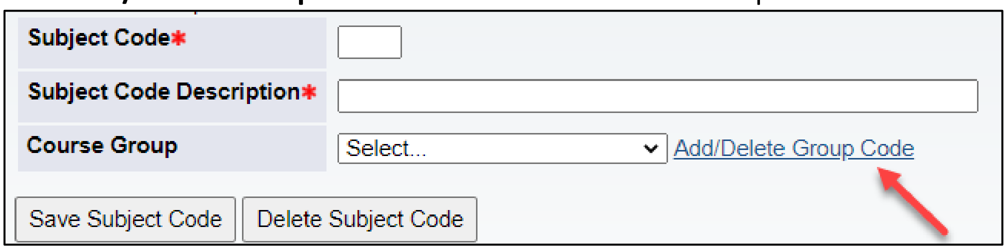
6. Click the **Group Code** link you wish to edit under Group Code column. The details for that group code will appear in editable text fields at the top of the screen.
7. Make your modifications.
8. Click **Save Group**. Your action is confirmed.

Delete an existing group code

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. Click **Add New Course**.
4. Click **Add/Delete Subject Code** link beside the Subject Code field.



5. Click **Add/Delete Group Code** link beside the Course Group field.



6. Click the **Group Code** link you wish to delete under Group Code column. The details for that group code will appear in editable text fields at the top of the screen.
7. Click **Delete Group**. Your action is confirmed and click OK.

Warning: You will not be able to delete a group if there are course subjects within that group. An error message will be displayed.

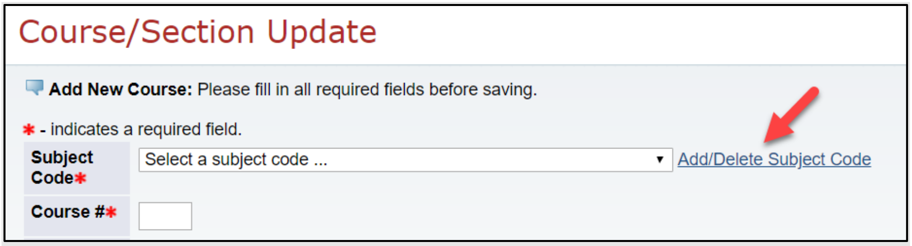
Subject code (Course name)

When you are creating a 'subject code', it means that you are creating a general 'course name'. For example, you created a group code called, "WS: Web Management" and now you will create the subject code called," WMS: Web Services."

Add a new subject code

It is recommended to review existing subject codes first to ensure that the subject code that you are adding does not already exist.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. Click **Add New Course.**
4. Click **Add/Delete Subject Code** link beside the Subject Code field.



5. Above the list of already existing course subjects, enter the following:
   a. **Subject Code**: enter a 1-3 characters code to represent the course code.

   b. **Subject Code Description:** enter a brief title that describes this subject

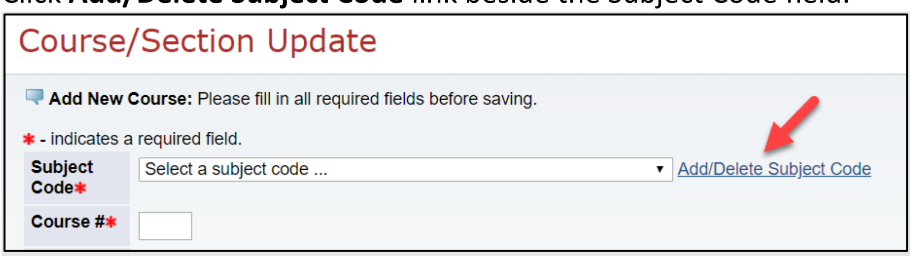
   c. **Course Group:** Select a course group (which is the Group code) from dropdown list.

6. Click **Save Subject Code**. Your action is confirmed.

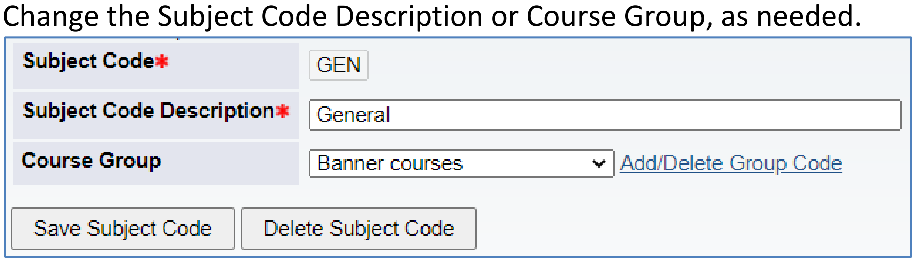
Edit an existing subject code

It is recommended to review existing codes first to ensure that you are not selecting preexisting code unless there is the intention to overwrite the code.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. Click **Add New Course.**
4. Click **Add/Delete Subject Code** link beside the Subject Code field.



5. Click the **Subject Code** link you wish to edit from the list of existing course subjects. The details for that subject code appear in editable text fields at the top of the screen.
6. Change the Subject Code Description or Course Group, as needed.



7. Click **Save Subject Code**. Your action is confirmed.

Warning: If the subject code you entered is already in use, the system will automatically overwrite the existing one with the new Subject Code Description and Course Group information you just specified.

Delete an existing subject code

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. Click **Add New Course.**
4. Click **Add/Delete Subject Code** link beside the Subject Code field.
5. Click the **Subject Code** link you wish to delete from the list of existing course subjects. The details for that subject code appear in editable text fields at the top of the screen.
6. Click **Delete Subject Code**. Your action is confirmed. Click OK.

Warning: You will not be able to delete a subject if there are courses within that subject. An error message will be displayed.

New course (Course level)

Before you create a new course, make sure you have created a [Group Code]() and [Subject Code](). When you are creating a 'New course", you will be entering the 'Course level" information such as the course number and title.

Add a new course

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. Click **Add New Course**.
4. Fill in all required fields (*):
   a. **Subject Code**: select one of the existing subject codes.
      If you are creating a series of new courses, click **Add/Delete Subject Code** to add a new subject code (For more instructions, refer to [Add a new subject code]()).
   b. **Course#**: enter a unique number for the course (up to 5 characters). Click the down-arrow next to 'Course Numbers in use…' to see course numbers already in use.
   c. **Course Title**: enter a descriptive title (up to 60 characters), such as "Introduction to Expense Reports"; this title will appear beside the course number on registration screens.
   d. **Webpage** (optional): Enter the URL of the course, if applicable (up to 100 characters).
   e. **Status:** Select**:**
      i. **Active:** course *is* available for the trainee to register.
      ii. **Inactive:** course *is not* available for the trainee to register.

f. **FOAPAL required indicator**: If this is checked, it means that when trainees register for the courses listed under this course group code, they will be required to enter the FOAPAL information.

g. **Supervisor notification indicator:** If this is checked, it means that the trainee's supervisor will get an email that he or she has registered for the course.

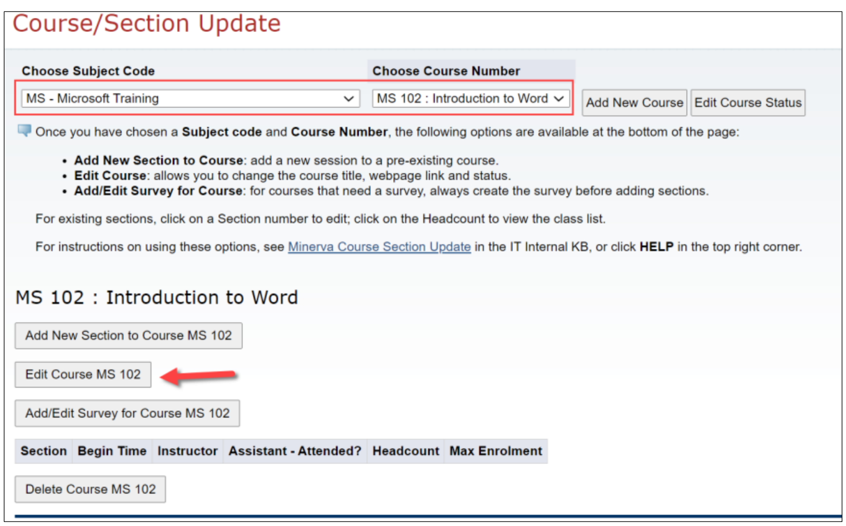
h. **This course needs admin approval**: If this is checked, it means that you do not want the system to automatically approve the course because you need to verify that the trainees have taken the pre-requisite course(s) before taking this course. For example, you want to verify that the trainees took WMS 300 before taking WMS 301.

5. Click **Save Course**. Your action is confirmed by a message.

Note: If the course number you have entered is already in use, the system will automatically reject it to avoid duplication.

Edit an existing course

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. From the Course/Section Update page, select the **subject code** and **the course number** of the course you want to edit.
4. Above the list of the course sections, click **Edit Course <the course number >**.

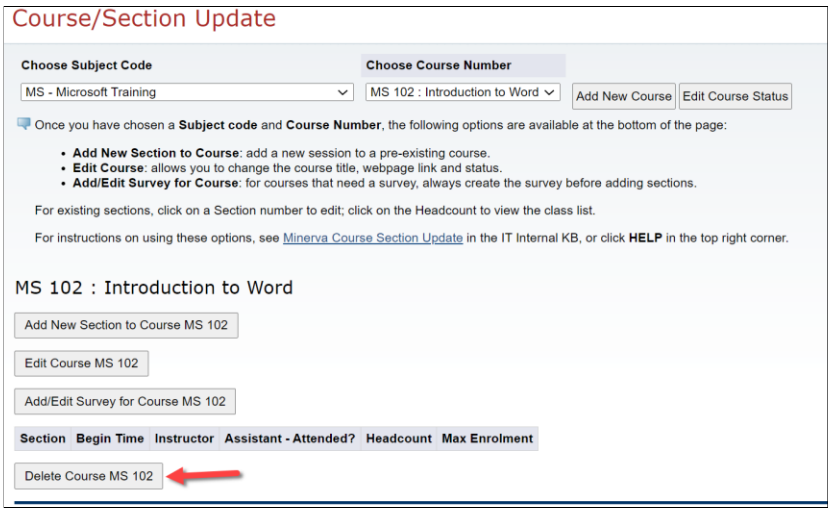


5. Make your modification to the course. See Add a new course for field descriptions.
6. Click **Update Course** to save your changes or **Reset** to start over.

Delete an existing course

Note: you can only delete an existing course if you have not scheduled any sessions and no one has registered for the course.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. From the Course/Section Update page, select an existing course **Subject Code** and **Course Number**.
4. Click **Delete Course <the course number>**.

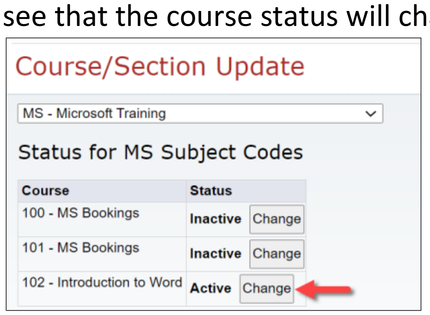


5. Click **OK** to confirm the deletion of the course.

Set the course to be active/inactive course

Note: if you are no longer offering the course and you do not want to the registrants to see the course, you can set the course to be ”inactive”.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. Click **Edit Course Status**.
4. Select a Subject Code.
5. You will see the course under this Subject Code. Find the course and click **Change**. You will see that the course status will change from **Active** to **Inactive** or vice versa.



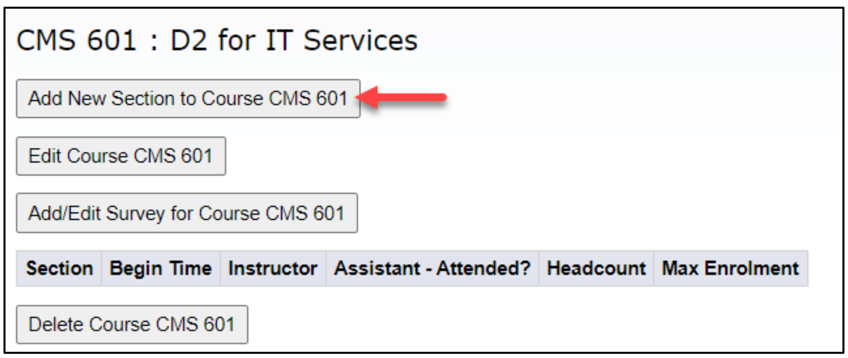
Admin - Schedule a course

Before you schedule your courses, you should create your courses: for more instructions, refer to [Add a new course .]

Add a new course section

The following are instruction on how to add a new course section to an existing or newly created course(s). The course must be set to ‘active’.

1. From the Minerva main menu, click **Training** tab.
2. Ensure that you have created your course and course survey. If you have not, refer to Add a new course survey .
3. Click **Admin - Course/Section Update**.
6. From the Course/Section Update page, select an existing course **Subject Code** and **Course Number**. All the sections for the selected course are listed on the page.
4. Click **Add New Section to Course <number >**.



5. Fill in the required fields (*):

    a. **Section**: If you are scheduling the course for the first time, enter ‘1’. Or else, enter the next available section number. To check the section numbers already in use, use the drop-down list.
    Special section numbers: The following section numbers are used to indicate special types of sections:

        a. 888 = "waitlist" section, for which no date has been scheduled

        b. 998 = "one-on-one" section

        c. 997 = "online" section. It is not classroom-based/instructor-led.

    b. **Begin and End Date**: Enter the date in the format **MM/DD/YYYY** or click the calendar icon on the right to choose the date. Once you select the Begin Date, the End Date is automatically updated to match.

c. **Begin and End Time**: Enter the time using the format **HHMM**. For example, if the section will take place from 9:30 am to 1:30 pm, enter "0930" for the Begin Time, and "1330" for the End Time.

d. **Duration (Hrs)**: the system automatically calculates once you have saved the information.

e. **Building/Location Code**: Enter the building using the corresponding location code. Click **Search** to obtain the code by searching through available locations. Note: if you are offering a course remotely, refer to Add 'online' or 'remote' to the building/location code for scheduling a course.

f. **Room Number:** (optional): Enter the room number where the course will take place.

g. **Instructor/Assistant**: (optional): Select the name of the instructor and the assistant from the dropdown list. If the instructor or assistant is not listed, leave it blank for now.

Note: When you select an instructor/assistant name and then save the section, the system will send them an Outlook notification to let them know that they are assigned to teach on that date and time. If you would like to change the instructor/assistant, you will need to edit an existing course section and change the instructor/assistant field. Then, the system will send an Outlook notification to the new instructor/assistant. However, the system will not send a cancellation Outlook notification to the previous instructor/assistant.

h. **Restricted?**: Restricted sections are not advertised, meaning that the course is only intended for a specific group of people. For most courses, leave this section with the default choice of "No", and make sure there is a web page link associated with the course, so that it can be displayed on the registration request form.

i. **Maximum Enrolment:** Enter the course capacity.

j. **Course Evaluations:** Select the appropriate evaluation for the course.

6. Click **Save Section**. Your action is confirmed.

Warning:

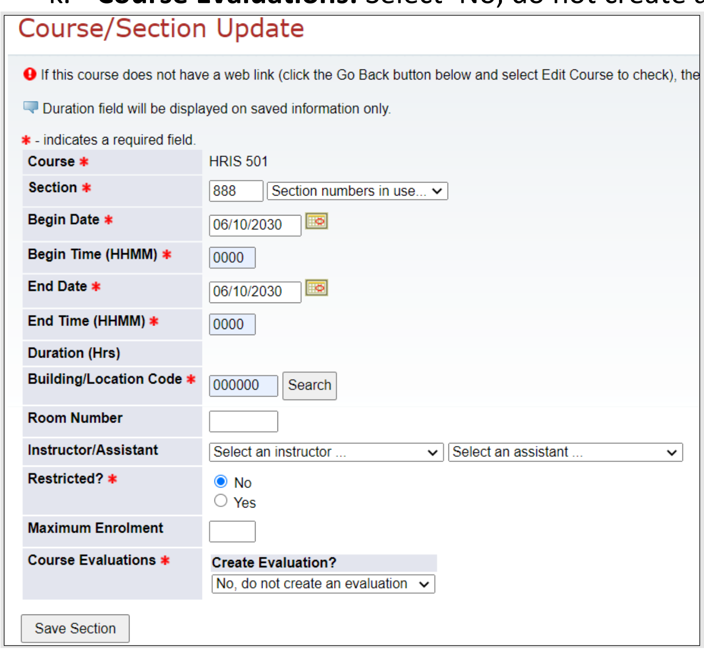
- If you have not filled in all the required fields, or if the format of the data is incorrect, you will receive an error message and you will be asked to correct the missing/incorrect information.
- If you have scheduled a building code for the same date and time for another course, you will get an error message. Click back on your browser and change the building code and/or date and time.

Add 'waitlist' section to an existing course

You can create a 'waitlist' section to an existing course, if:

- You have not scheduled any course section yet.
- You would like to give registrants the option to put themselves on the waitlist because they are not available during the scheduled date.
- The course is taught 'on demand'.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. From the Course/Section Update page, select an existing course **Subject Code** and **Course Number**. All the sections for the selected course are listed on the page.
4. Click **Add New Section to Course <number >**.
5. Fill in the following fields (*):
    a. **Section:** Enter '888'.
    b. **Begin Date:** Enter a future date (e.g., 01/01/2030).
    c. **Begin Time:** Enter '0000'.
    d. **End Date:** Enter the same date as the Begin date.
    e. **End Time:** Enter '0000'.
    f. **Building/Location Code:** Enter '000000'.
    g. **Room Number:** Leave it blank.
    h. **Instructor/Assistant:** Leave it blank.
    i. **Restricted:** Select 'No'.
    j. **Maximum Enrolment:** Leave it blank.
    k. **Course Evaluations:** Select 'No, do not create an evaluation'.



6. Click **Save Section** when you are done.

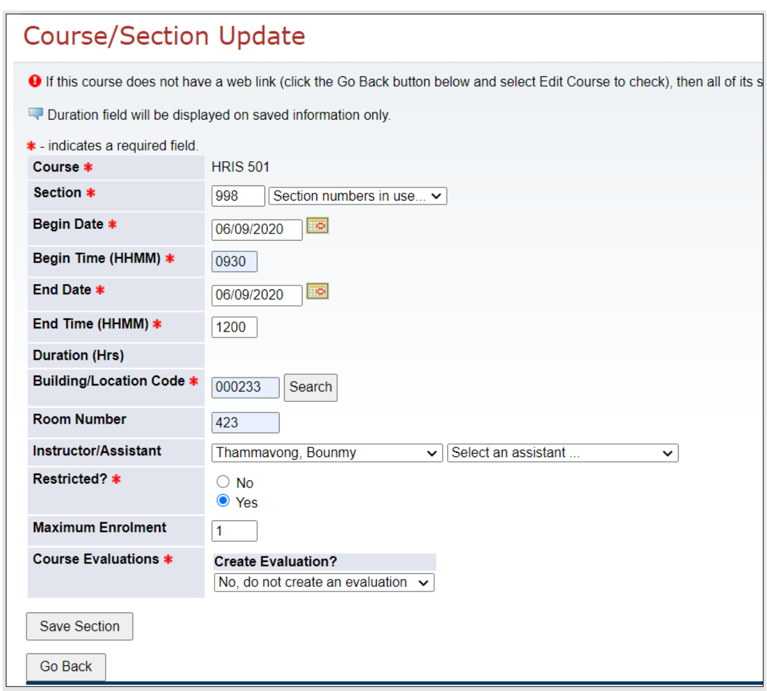
Add ‘one-on-one’ to an existing course

You can schedule a one-on-one for an existing course. Note: this will be a restricted course.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. From the Course/Section Update page, select an existing course **Subject Code** and **Course Number**. All the sections for the selected course are listed on the page.
4. Click **Add New Section to Course <number >**.
5. Fill in the following fields (*):
    a. **Section**: Enter ‘998’.
    b. **Begin Date**: Enter the start date.
    c. **Begin Time**: Enter the begin time.
    d. **End Date**: Enter the end date.
    e. **End Time**: Enter the end time.

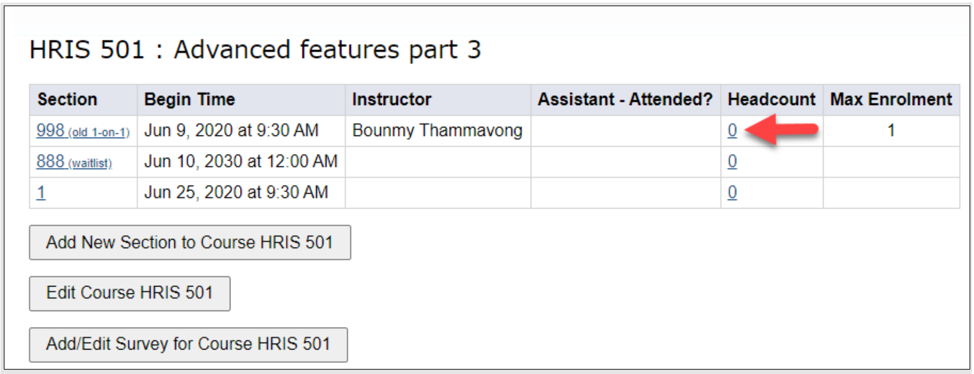
    k. **Building/Location Code**: Enter the building using the corresponding location code. Click **Search** to obtain the code by searching through available locations.
    Note: if you are offering a course remotely, refer to Add ‘online’ or ‘remote’ to the building/location code for scheduling a course.

    f. **Room number**: Enter the room number.
    g. **Instructor/Assistant**: Select the instructor.
    h. **Restricted**: Select ‘Yes’. The course will not be available in the employee menu for direct registration. Only administrators will be able to add registrants
    i. **Maximum Enrolment**: Leave it blank.
    j. **Course Evaluations**: Decide if there will be a course evaluation or not.

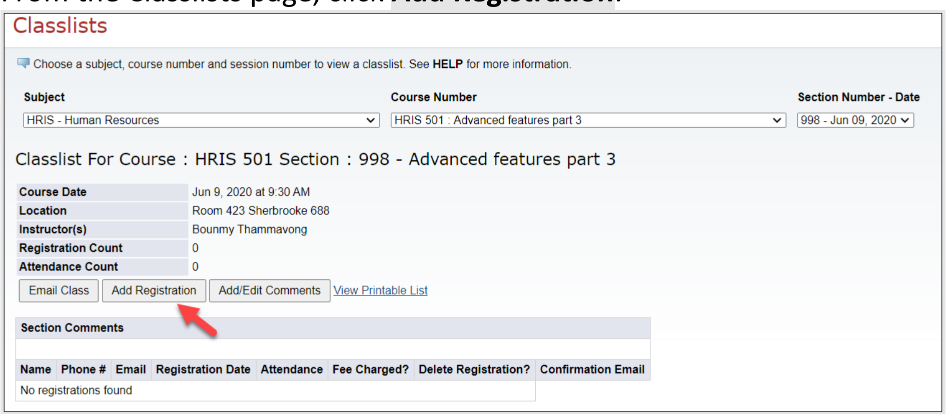


6. Click **Save Section** when you are done.

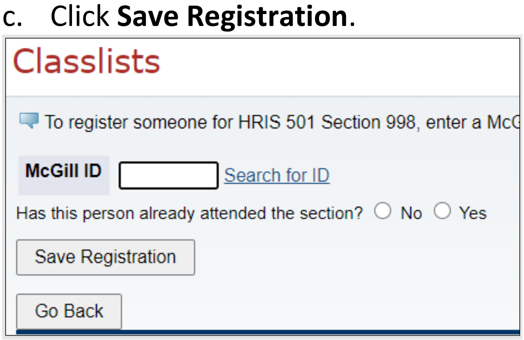
7. You will now add the trainee to that course section by clicking on the link under the **Headcount** column.



8. From the Classlists page, click **Add Registration**.



9. On the next screen:
   a. Enter or search for the person's ID number
   b. Select 'No' for the question 'Has this person already attended the section?
   c. Click **Save Registration**.



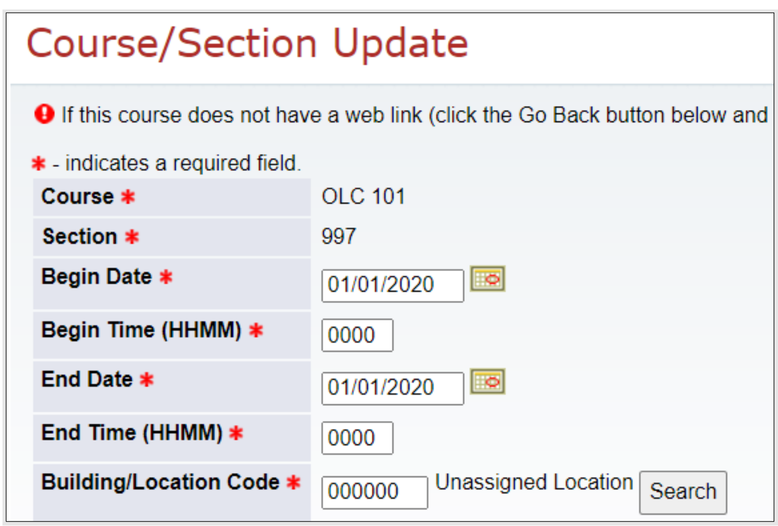
10. You should see the trainee's name. Click **Resend** to send an outlook invitation notification. The email information displays: Name, Email, Course Section, Subject Text and Body Text. Click **Send**.

Add ‘online’ section to an existing elearning course

If you have created an elearning course in myCourses and you need to keep track of the participants, you can create an ‘online’ section to an existing elearning course.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. From the Course/Section Update page, select an existing course **Subject Code** and **Course Number**. All the sections for the selected course are listed on the page.
4. Click **Add New Section to Course <number >**.

5. Fill in the following fields (*):
    a. **Section**: Enter ‘997’.
    b. **Begin Date**: Enter today’s date (e.g., 03/01/2021).
    c. **Begin Time**: Enter ‘0000’.
    d. **End Date**: Enter ‘0000’.
    e. **End Time**: Enter ‘0000’.
    f. **Building/Location Code**: Enter ‘000000’.
    g. **Room number**: leave it blank.
    h. **Instructor/Assistant**: leave it blank.
    i. **Restricted**: Select ‘No’.
    j. **Maximum Enrolment**: Leave it blank.
    k. **Course Evaluations**: Select ‘No, do not create an evaluation’.

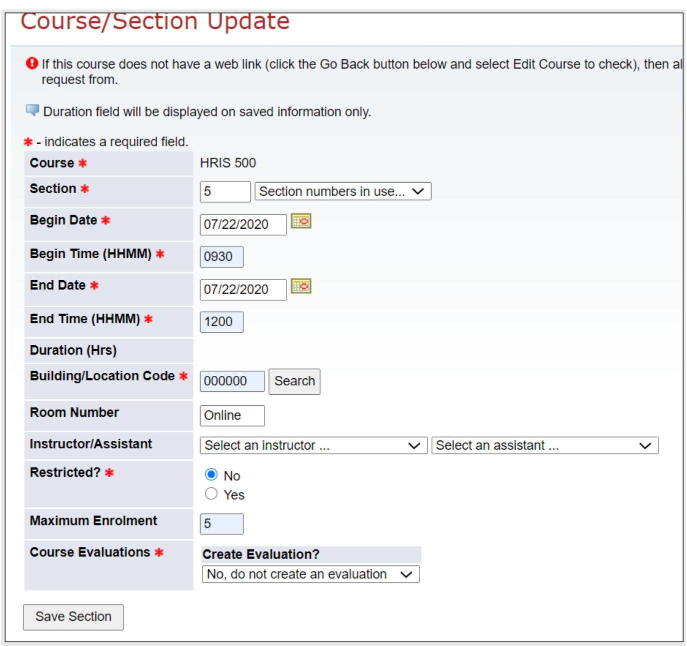


6. Click **Save Section** when you are done.

Add ‘online’ or ‘remote’ to the building/location code for scheduling a course

If the course is a remote or online teaching, you can indicate it when you enter the building/location code and the room number fields.

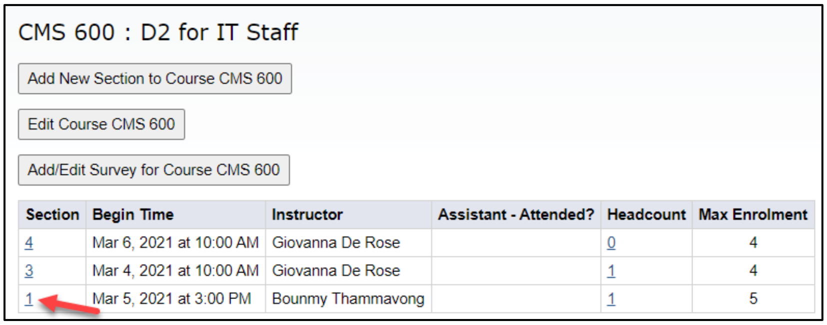
1. From the Minerva main menu, click **Training** tab.
2. Click **Admin- Course/Section Update**.
3. From the Course/Section Update page, select an existing course **Subject Code** and **Course Number**. All the sections for the selected course are listed on the page.
4. Click **Add New Section to Course <number & title>**.
5. Fill in the following fields (*):
    a. **Section**: Enter ‘997’ enter the next available section number. To check the section numbers already in use, use the drop-down list.
    b. **Begin Date**: Enter the start date.
    c. **Begin Time**: Enter the begin time.
    d. **End Date**: Enter the end date.
    e. **End Time**: Enter the end time.
    f. **Building/Location Code**: Enter ‘000000’.
    g. **Room number**: enter ‘online’ or ‘remote’.
    h. **Instructor/Assistant**: Select the instructor from the drop-down list.
    i. **Restricted**: Select ‘No’.
    j. **Maximum Enrolment**: Enter the maximum number of enrolments.
    k. **Course Evaluations**: Select whether there is a course evaluation or not.



6. Click **Save Section** when you are done.

Edit an existing course section

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin- Course/Section Update**.
3. From the Course/Section Update screen, select an existing Subject Code and Course Number. All the sections for the selected course are listed on the page.
4. Click on the underlined section number under the **Section** column you wish to edit.



CMS 600 : D2 for IT Staff

Add New Section to Course CMS 600

Edit Course CMS 600

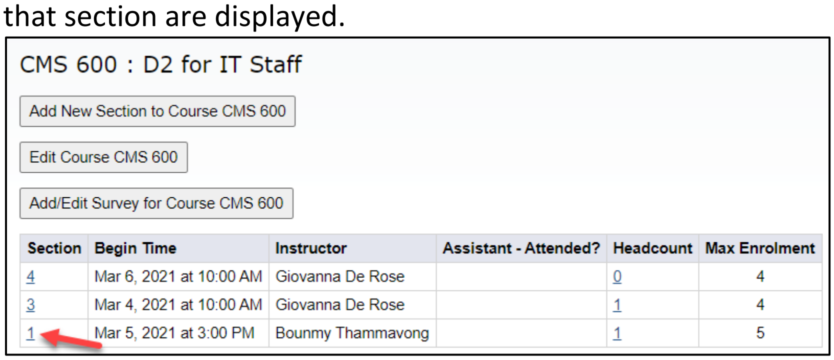
Add/Edit Survey for Course CMS 600

Section	Begin Time	Instructor	Assistant - Attended?	Headcount	Max Enrolment
4	Mar 6, 2021 at 10:00 AM	Giovanna De Rose		0	4
3	Mar 4, 2021 at 10:00 AM	Giovanna De Rose		1	4
1	Mar 5, 2021 at 3:00 PM	Bounmy Thammavong		1	5

5. Then, on the next screen, make your changes (e.g. date, time, location, instructor).
6. Click **Update Section** when you have finished. Or click **Reset** to undo changes and start over.
   Note: If you change the instructor/assistant name, the system will send the new instructor/assistant an Outlook notification to let them know that they are assigned to teach on that date and time. However, the system will not send a cancellation Outlook notification to the previous instructor/assistant. This will need to be done manually by you.
   Note: If you change the date, time or location for the same instructor, the instructor will not get an Outlook notification for these changes. This will need to be done manually by you.

Delete an existing course section

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin- Course/Section Update**.
3. From the Course/Section Update screen, select an existing course Subject Code and Course Number. All the sections for the selected course are listed on the page.
4. Click on the underlined section number of the section you wish to delete. The details for that section are displayed.



CMS 600 : D2 for IT Staff

Add New Section to Course CMS 600

Edit Course CMS 600

Add/Edit Survey for Course CMS 600

Section	Begin Time	Instructor	Assistant - Attended?	Headcount	Max Enrolment
4	Mar 6, 2021 at 10:00 AM	Giovanna De Rose		0	4
3	Mar 4, 2021 at 10:00 AM	Giovanna De Rose		1	4
1	Mar 5, 2021 at 3:00 PM	Bounmy Thammavong		1	5

5. Click **Delete Section**. A confirmation of your action is displayed at the top of the page.

Warning: It is possible to delete sections that have occurred in the past, as long as there are no registrants for the section.

Admin – Process Training Request

The Admin – Process Training Request menu is used when the Course Administrator has decided "**This course needs admin approval** "because of a prerequisite verification for a course. For example, you want to verify that the trainees took WMS 300 before taking WMS 301. To get instructions on how to set this up, refer to New course (Course level) section.

A Course Administrator will be able to perform the following steps to process pending training requests:

- Verify that a person has the necessary prerequisites
- Accept or reject a training request
- Putting a registration request on hold

Verify that a person has the necessary prerequisites

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Process Training Requests**.
3. Click on the underlined name of the person. This will bring you to that person's training record.

4. Verify that that person has attended the prerequisite courses. Click on the **Return to Request List** button to go back to the Process Training Requests page.
5. Decide whether to:

Accept or reject a training request

- A person's training request is **accepted** when they have all the necessary prerequisites for the course requested.
- A person's training request is **rejected** when they did not complete the pre-requisite.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin- Process Training Requests**.
3. Click on the underlined course that the person has requested to register in. This will bring you to that person's registration request.

4. Based on your decision to accept or reject, click on the appropriate button: **Approve 1st Choice**, **Approve 2nd Choice** or **Reject.**

5. Once you have clicked the appropriate button to approve or reject, you will be brought to the email screen, with the default message for the action you selected.

6. If you have approved the request, a generic acceptance email will be automatically entered in the **Body Text** section. If you have rejected it, a generic rejection email will be automatically entered in the **Body Text** section. You can modify the message, if needed.

7. Choose one of the following:
   - **Send Email:** only sends regular email
   - **Send Email & Outlook calendar notification:** sends an Outlook Calendar notification (**Note:** do not select this for a rejection)
   - **No email required:** No emails will be sent
   - **Choose other email:** allows you to choose the Default emails that you have set up

Put a training request on hold

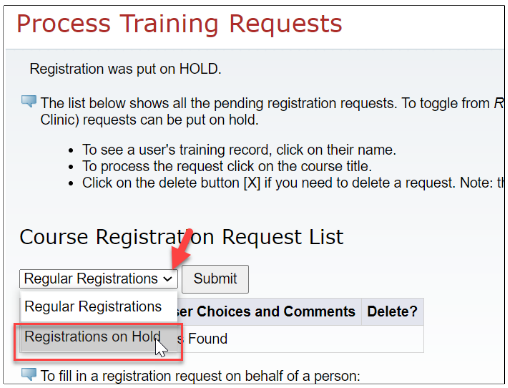
A person's training request is put on hold when a course pre-requisite has not been met and if a requirement is needed (e.g., if you need the person to pay first before you accept their registration).

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin- Process Training Requests**.
3. Click on the underlined course that the person has requested to register in. This will bring you to that person's registration request.

4. Click **Hold** (at the bottom of the page). This will bring you to the default email message for courses put on hold. You can customize the **Subject** and **Body** text of the message to reflect the reasons why the registration was put on hold.

5. Choose one of the following:
    a. **Send Email:** only sends regular email
    b. **Choose other email:** allows you to choose the [Default emails]() that you have set up.

6. Once the person has met the required information to register for the course, do the following:
    a. Go to the Process Training Request Page.
    b. Under the Course Registration Request List section, click the drop down and select **Registration on Hold** and then click Submit.



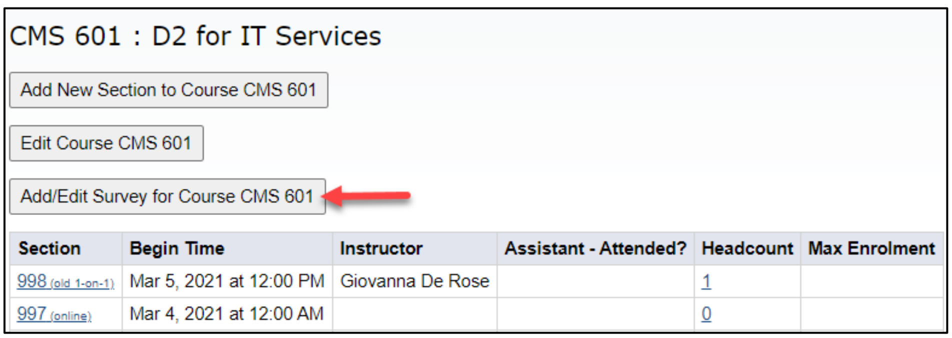
    c. Click on the underlined course that the person has requested to register in. This will bring you to that person's registration request.
    d. Based on your decision to accept or reject, click on the appropriate button: **Approve 1st Choice**, **Approve 2nd Choice** or **Reject.**
    e. Once you have clicked the appropriate button to approve or reject, you will be brought to the email screen, with the default message for the action you selected.
    f. If you have approved the request, a generic acceptance email will be automatically entered in the **Body Text** section. If you have rejected it, a generic rejection email will be automatically entered in the **Body Text** section. You can modify the message, if needed.
    g. Choose one of the following:
        - **Send Email:** only sends regular email
        - **Send Email & Outlook calendar notification:** sends an Outlook Calendar notification (**Note:** do not select this for a rejection)
        - **No email required:** No emails will be sent
        - **Choose other email:** allows you to choose the [Default emails]() that you have set up.

Admin - Create a course survey

Surveys can be used to obtain information from registrants before the course is given. Registrants' survey responses may indicate a baseline level of knowledge, allowing the instructor to tailor the presentation.

Adding a new course survey

1. From the Minerva main menu, click **Training** tab.
2. Ensure that you have created your course. If you have not, refer to [Add a new course]().
3. Click **Admin - Course/Section Update**.
4. From the Course/Section Update page, select an existing course **Subject Code** and **Course Number**. All the sections for the selected course are listed on the page.
5. Click **Add/Edit Survey for Course** (#) at the top of the screen.



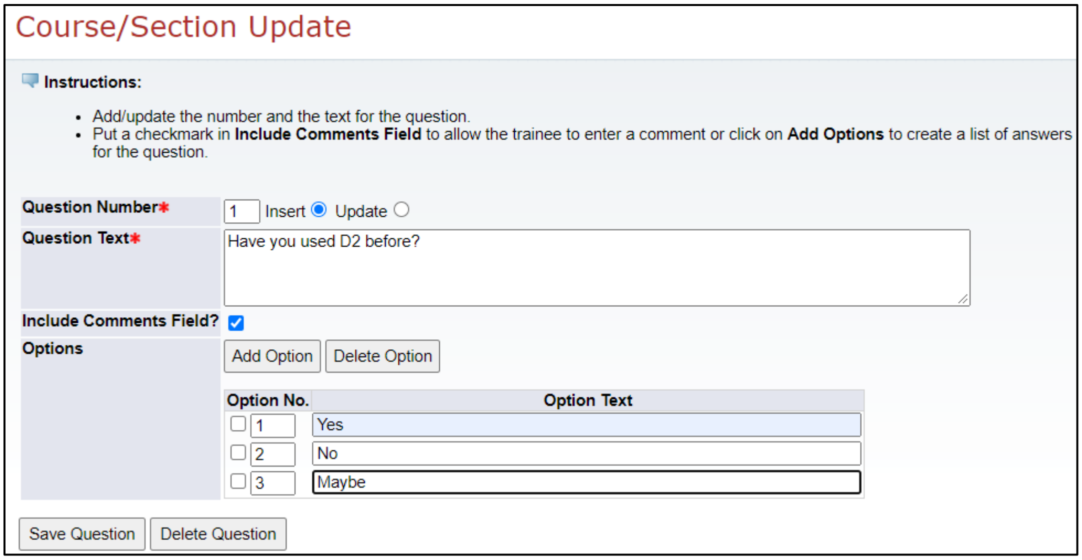
6. Click **Add Question** to add the first question. Enter the required information:
   a. **Question Number**: Enter a number for the question -- questions will be presented in order from lowest to highest.

   b. **Question Text**: Enter the text of the question.

   c. **Include Comments Field?**: If this box is checked, the question will have a text entry field for the response. You can include a comment field whether the question has options or not.

   d. **Options**: To add choices, from which the respondent will select the most appropriate response, click **Add Option** for each option; then specify the number of the option (usually sequential) and the text.

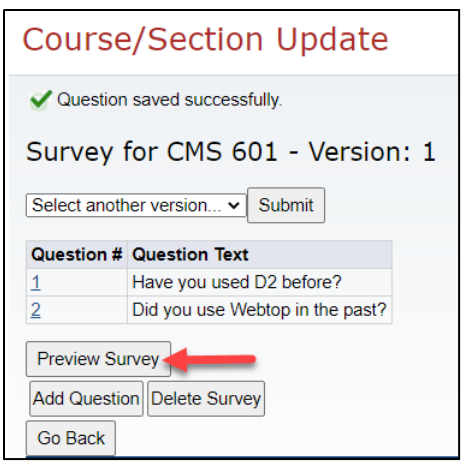
   If you want the respondent to be able to type in their own response, be sure to make the last choice: "Other (please specify)", and check **Include Comments Field**.



To delete one or more options you have entered, check the box to the left of each option you want to remove, and click **Delete Option**.

7. Click **Save Question** to add the question to your survey. Continue adding questions until your survey is complete.

8. Click **Preview Survey** to see what the respondent will see on screen.

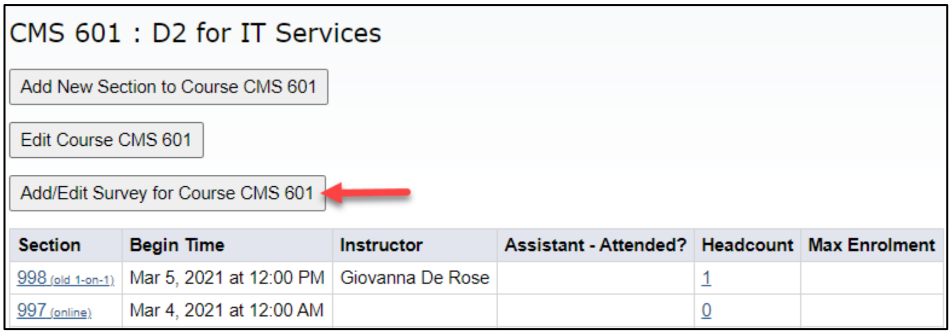


Note: If there are already surveys for the course, the surveys will appear on the screen when you click **Add/Edit Survey for Course**. Click on **Add Question** to insert a new question. Click on **Preview Survey** to see trainee's view. Click on **Delete Survey** if this course no longer needs a survey – a warning appears if trainee responses already exist.

To edit existing questions, click on the question number, make the change, and click **Save Question**.

Edit an existing course survey

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin - Course/Section Update**.
3. From the Course/Section Update page, select an existing course **Subject Code** and **Course Number**. All the sections for the selected course are listed on the page.
4. Click **Add/Edit Survey for Course <#>** at the top of the screen.



5. Select the survey version you want to edit and click **Submit**.

   If the survey already contains responses, you will not be able to make any changes to it. In this case, you need to create a new survey by clicking the **Go Back** button and then selecting **Add/Edit Survey for Course <#>** at the top of the screen.

6. Click on the underlined question number you want to modify.
7. Make the necessary changes. Once you are done, click **Save Question**.

Note: Be careful if you are attempting to reorder the questions in a survey. There are two possible actions:

1. Click the **Insert** radio button and enter the new question number. This action copies the current question to a different position in the survey. If there was an existing question with that number, its number and all subsequent questions are shifted down, so you don't lose any of your questions. However, now there are two versions of the question -- one at the new position and one at its original position.
2. Click the **Update** radio button and enter the new question number. This copies the current question to the new position, overwriting the question that was previously in that position. The former version of the question remains in its original position.

Delete a course survey

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin- Course/Section Update**.
3. From the Course/Section Update page, select an existing course **Subject Code** and **Course Number**. All the sections for the selected course are listed on the page.
4. Click **Add/Edit Survey for Course <# >** at the top of the screen.

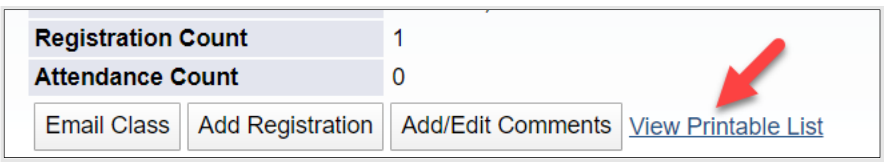
5. Select the version of the survey you want to delete and click **Submit**.
6. Click **Delete Survey**. In this case, a warning message appears and will inform you whether the survey already contains responses or not.

Warning: If you confirm the deletion of the survey, the responses attached to it will be deleted as well.

View the course survey

The instructor and the course administrator will be able to view the registrants survey response before the training session.

1. From the Minerva main menu, click **Training** tab.
2. Click **Instructor - Classlists**.
3. From the Classlists page, select an existing course **Subject**, **Course Number** and **Section Number - Date**. You will now see the list of registrants.
4. Click **View Printable List** link.



5. You will see your survey questions. Click **Check All** and then click **Submit.**
6. You will now see the survey responses.

Admin - Course evaluation

The course evaluation is used to gather constructive feedback on the instructor's performance or on the overall course content. At the end of the course, the instructor will ask the attendees to complete the online course evaluation, which is located in Minerva under the Employee menu > Training Menu > Training Evaluations.

As course administrator, you may need to do the following:

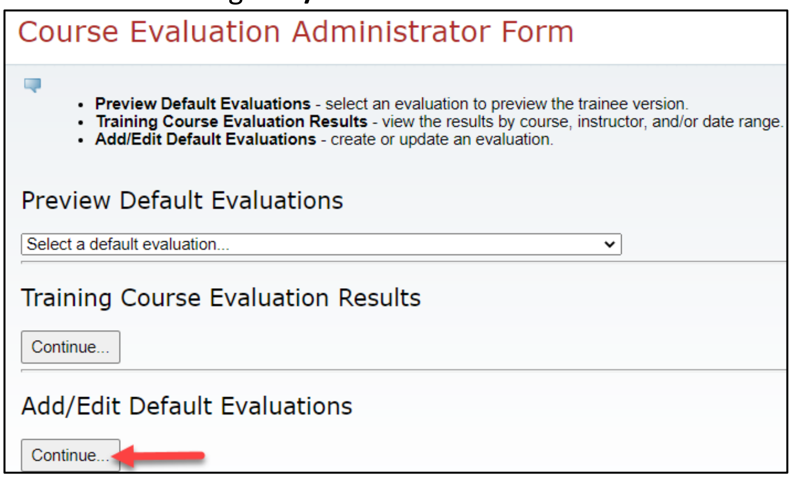
- Create a course evaluation
- Edit a course evaluation
- Delete a course evaluation
- Preview a course evaluation
- View course evaluation results

Note: This is a shared course evaluation page, please make sure to modify your own course evaluation that you created.

Create a course evaluation

Make sure that you prepared your questionnaire before creating a course evaluation in the Minerva registration system. Also, once you begin receiving evaluations, you will not be able to edit the course evaluation.

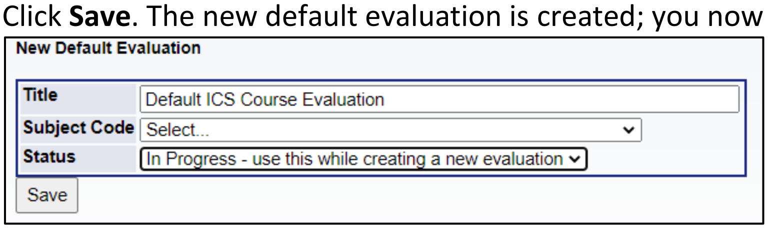
1. From the Minerva main menu, click **Training** tab.
2. Click **Admin – Evaluations/Questionnaires**.
3. On the main page of the Course Evaluation Administrator form, click **Continue**... located below the heading **Add/Edit Default Evaluations**.



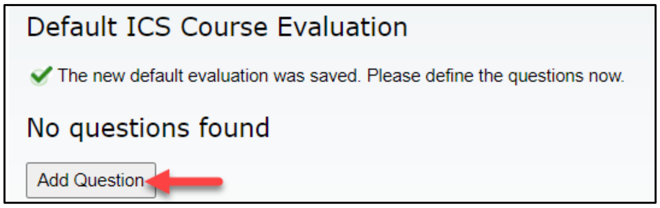
4. Click **Create New** from the top of the page.
5. Fill in the fields below **New Default Evaluation**, as follows:

   - **Title**: Enter a brief title that describes the course evaluation. For example, “Default ICS Course Evaluation”.
   - **Subject Code**: Select the course subject for which the course evaluation is being created.
     Note: Optionally, you can leave this field blank.
   - **Status**: Select **In Progress** because you are in the process of creating a course evaluation. Once the course evaluation is finalized, change its status to **Active**. If the course evaluation is no longer being used, change its status to **Inactive**.

6. Click **Save**. The new default evaluation is created; you now need to add questions to it.



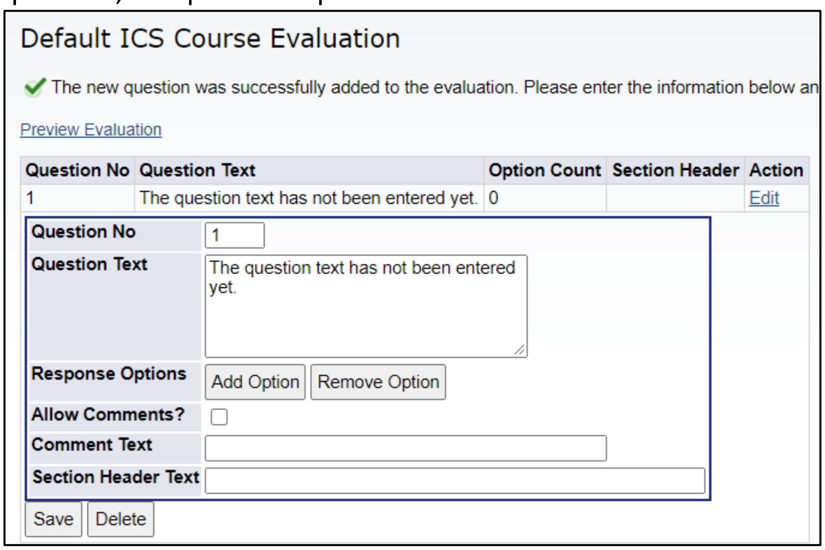
7. Click **Add Question**.



8. Enter the number of the new question (enter 1, if it's the first question), and click **Add**.

   Note: If you enter a question number that is already being used, the existing questions will be shifted over.

   The new question is added with default text. You now need to specify the text of the question, and possible options for the user to choose.



9. Fill the following fields:

   - **Question No**: The number of the question you just added is already set in this field.

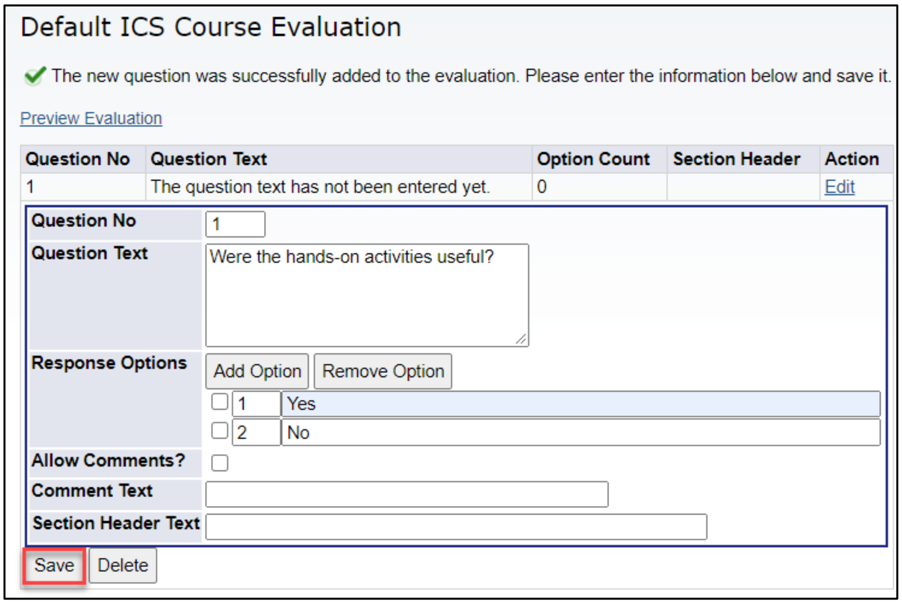
   - **Question Text** : Enter the question that will appear on screen.

   - **Response Options**:

     Click **Add Option** to create a list of possible answers for the question. Enter a number for each option, to indicate the order in which it will appear. For a simple question, the options could be: 1) "Yes" 2) "No". If your question requires a reply based on a rating scale, you might enter: 1) "Strongly agree", 2) "Agree", 3) "Disagree" and 4) "Strongly disagree".

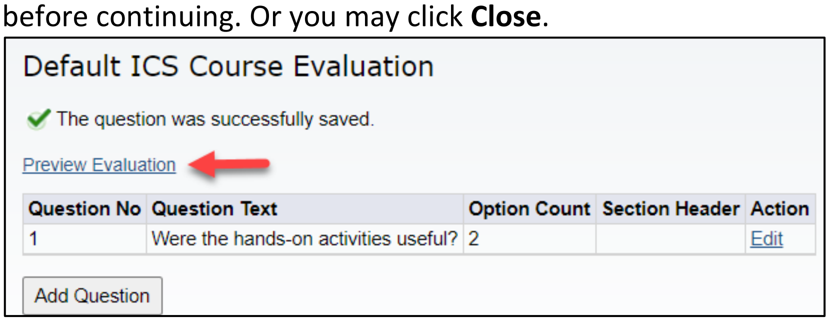
     To remove an option, put a checkmark in the appropriate option box and click **Remove Option**.

- **Allow Comments** (optional): Check this box to allow a trainee to enter any additional comments in a text entry box. This field is also used when the question requires a text response, instead of options. For instance, if your question text was "Describe your experience with web publishing tools before this course.", you would leave the options empty and only check **Allow Comments**.
- **Comment Text** (optional): Enter the text that will precede the comments box, such as “Additional comments”, or "Please elaborate".
- **Section Header Text** (optional): Enter a header text to describe the different sections within the course evaluation. For example, some questions are concerning the instructor while other questions are about the course content.



10. Click **Save**. A message confirms your actions.

11. To see how your course evaluation will look on screen, click **Preview Evaluation**. Click the "**X**" in the upper right corner of the window to close the Preview window before continuing. Or you may click **Close**.



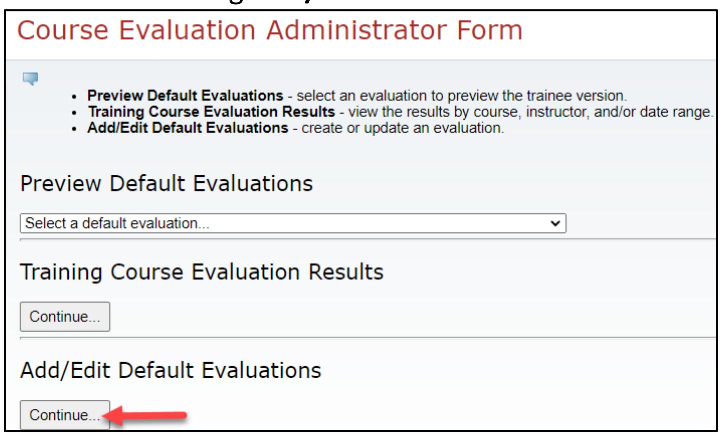
12. Once you have closed the Preview Evaluation window, click **Add Question** and repeat steps 8 to 11 to add the remaining questions for your evaluation.

Edit a course evaluation

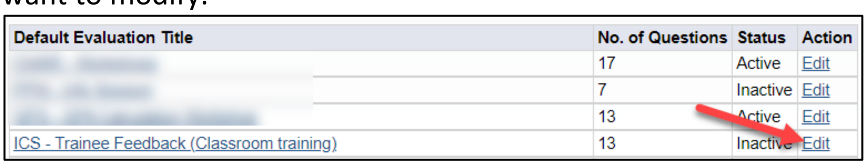
Note: This is a shared course evaluation page, please make sure to modify your own course evaluation that you created. Keep in mind that you will no longer be able to modify the course evaluation once it contains responses. This means you will need to create another version and change the status of the first version to 'Inactive'.

The following are steps on how you can edit a course evaluation before making it accessible to the trainees:

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin – Evaluations/Questionnaires**.
3. On the main page of the Course Evaluation Administrator form, click **Continue**... located below the heading **Add/Edit Default Evaluations**.

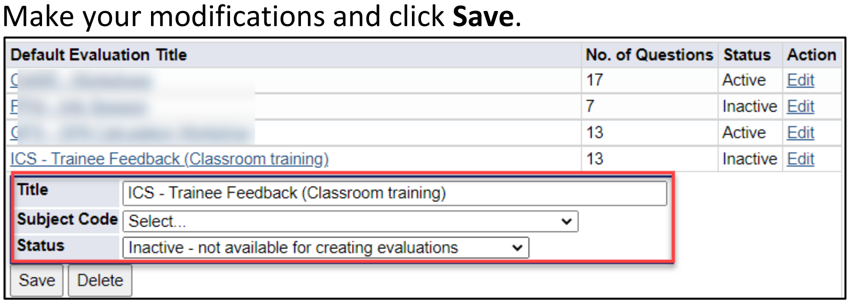


4. To change the title, the subject code to which the evaluation belongs or the status, click **Edit** in the **Action** column, of the row containing the course evaluation that you want to modify.



Default Evaluation Title	No. of Questions	Status	Action
[illegible]	17	Active	Edit
[illegible]	7	Inactive	Edit
[illegible]	13	Active	Edit
ICS - Trainee Feedback (Classroom training)	13	Inactive	Edit

   - The **Title**, **Subject Code** and **Status** of the evaluation are displayed in editable fields just below that evaluation.
   - Make your modifications and click **Save**.

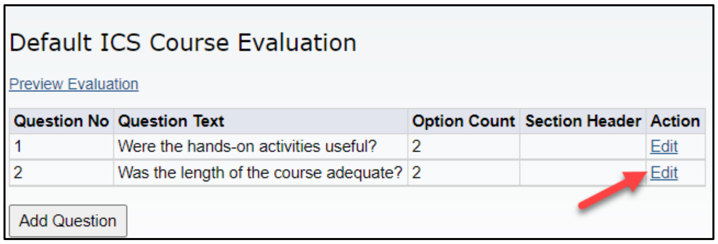


Default Evaluation Title	No. of Questions	Status	Action
[illegible]	17	Active	Edit
[illegible]	7	Inactive	Edit
[illegible]	13	Active	Edit
ICS - Trainee Feedback (Classroom training)	13	Inactive	Edit

Title	ICS - Trainee Feedback (Classroom training)
Subject Code	Select...
Status	Inactive - not available for creating evaluations

Save Delete

5. To add, delete or edit the questions within the course evaluation, click on the name of the course evaluation link.
   - The questions for that evaluation are listed.
   - Click **Edit** in the row of the question you want to change.



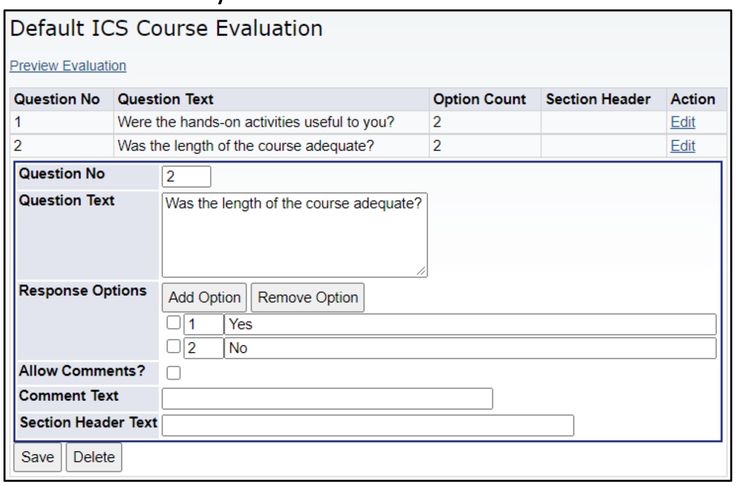
Default ICS Course Evaluation

Preview Evaluation

Question No	Question Text	Option Count	Section Header	Action
1	Were the hands-on activities useful?	2		Edit
2	Was the length of the course adequate?	2		Edit

Add Question

   - Make your changes to the question text, options, or comments field and click **Save** when you are done.



Default ICS Course Evaluation

Preview Evaluation

Question No	Question Text	Option Count	Section Header	Action
1	Were the hands-on activities useful to you?	2		Edit
2	Was the length of the course adequate?	2		Edit

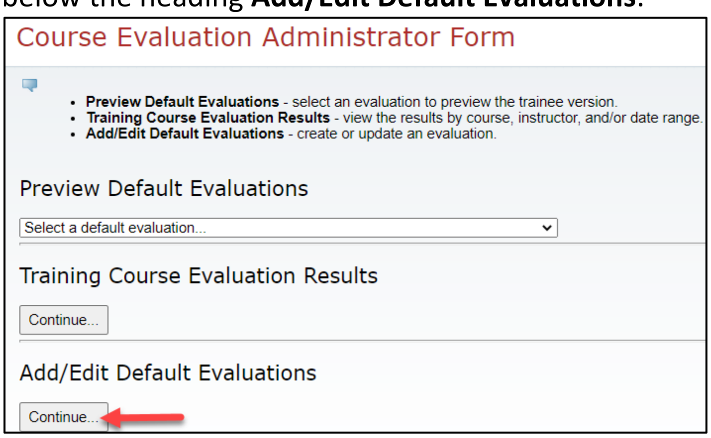
Question No	2
Question Text	Was the length of the course adequate?
Response Options	Add Option · Remove Option 1 Yes 2 No
Allow Comments?	
Comment Text	
Section Header Text	

Save · Delete

Delete a course evaluation

Note: Once the course evaluation contains responses, you will no longer be able to delete it.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin – Evaluations/Questionnaire**.
3. On the main page of the Course Evaluation Administrator form, click **Continue**... located below the heading **Add/Edit Default Evaluations**.



Course Evaluation Administrator Form

- **Preview Default Evaluations** - select an evaluation to preview the trainee version.
- **Training Course Evaluation Results** - view the results by course, instructor, and/or date range.
- **Add/Edit Default Evaluations** - create or update an evaluation.

Preview Default Evaluations

Select a default evaluation...

Training Course Evaluation Results

Continue...

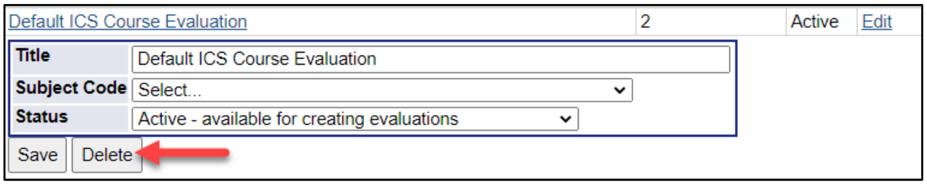
Add/Edit Default Evaluations

Continue...

4. Click **Edit** next to the course evaluation you wish to delete.

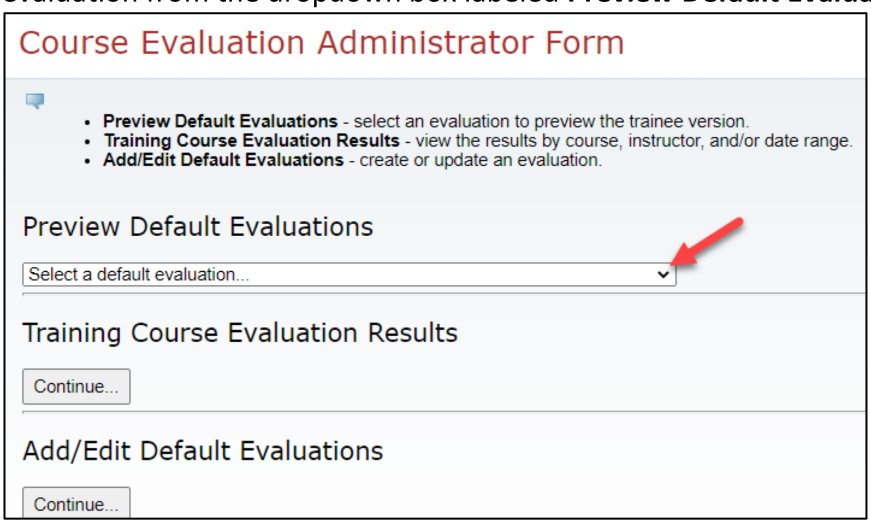
   - The Title, Subject Code and Status display.

5. Click **Delete**. Your action is confirmed.



How to preview a course evaluation

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin – Evaluations/Questionnaires**.
3. On the main page of the Course Evaluation Administrator form, select a course evaluation from the dropdown box labeled **Preview Default Evaluations**.

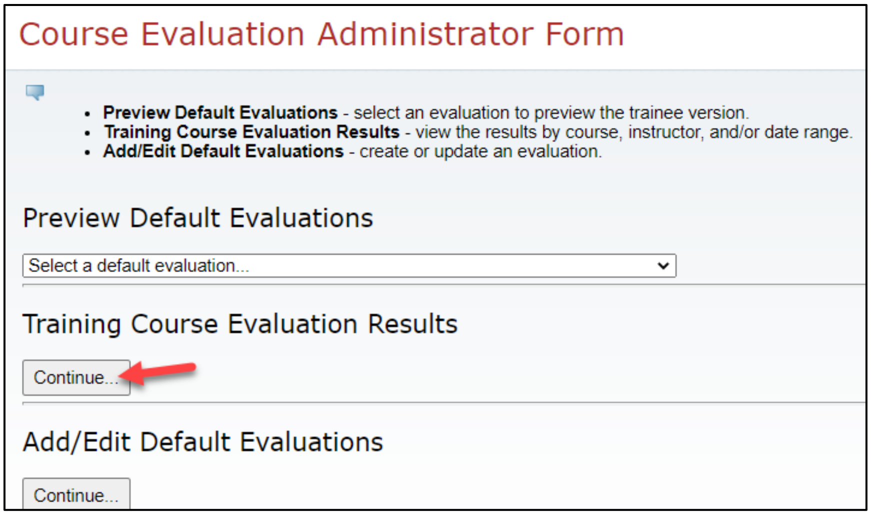


4. The evaluation appears on screen as it would for the trainee. Click **Close** to return to the main screen.

How to view course evaluation results

You will be able to filter and view the course evaluation results by course, instructor, and/or date range.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin – Evaluations/Questionnaires**.
3. On the main page of the Course Evaluation Administrator form, click **Continue...** located below the heading **Training Course Evaluation Results.**


Course Evaluation Administrator Form

- **Preview Default Evaluations** - select an evaluation to preview the trainee version.
- **Training Course Evaluation Results** - view the results by course, instructor, and/or date range.
- **Add/Edit Default Evaluations** - create or update an evaluation.

Preview Default Evaluations

Select a default evaluation...

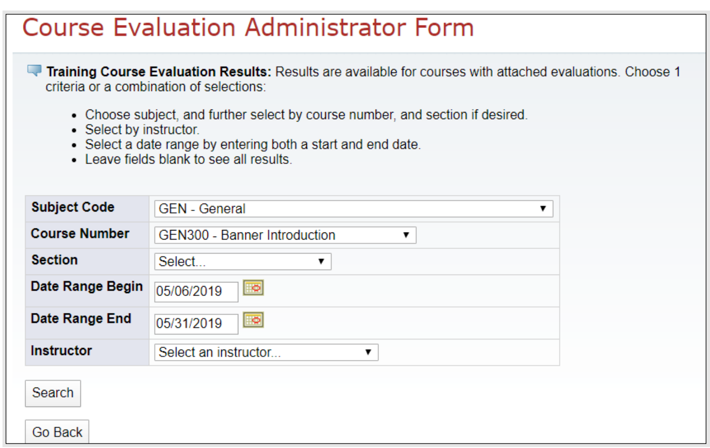
Training Course Evaluation Results

Continue...

Add/Edit Default Evaluations

Continue...

4. Choose criteria to identify the evaluation results you want to view:
   - **Subject Code**: Select the subject code of the course evaluation.
   - **Course number:** Select the specific course, if desired.
   - **Section:** You can specify a specific section, if desired.
   - Select **Date Range Begin** and **Date Range End** dates by clicking the calendar buttons next to those fields and selecting the dates. This will limit the results to those evaluations filled in between the selected dates.
   - **Instructor**: You can view the evaluation results of all courses/sections taught by a particular instructor by choosing the instructor's name and leaving all other fields empty.


Course Evaluation Administrator Form

Training Course Evaluation Results: Results are available for courses with attached evaluations. Choose 1 criteria or a combination of selections:

- Choose subject, and further select by course number, and section if desired.
- Select by instructor.
- Select a date range by entering both a start and end date.
- Leave fields blank to see all results.

Subject Code	GEN - General
Course Number	GEN300 - Banner Introduction
Section	Select...
Date Range Begin	05/06/2019
Date Range End	05/31/2019
Instructor	Select an instructor...

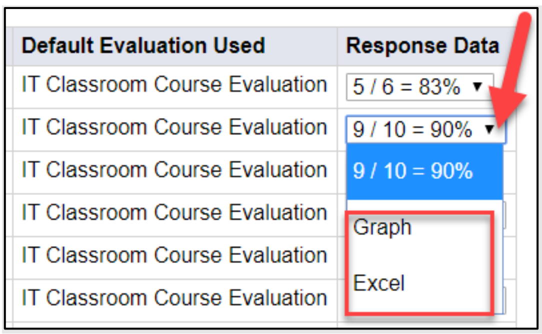
Search

Go Back

5. Click **Search** to list all the sections that correspond to your search criteria. The table that appears shows the **subject and Course number**, the **Section number** and the **Date** given in the first column, the **Primary Instructor**, the **Default Evaluation Used**, and **Response Data** (the ratio and percentage of the number of trainees who filled out the survey out of the total class attendees).

Course/Section/Date	Primary Instructor	Default Evaluation Used	Response Data
GEN 300 / 742 / Mar 04, 2019	[redacted]	IT Classroom Course Evaluation	4 / 4 = 100%
GEN 300 / 743 / Mar 11, 2019	[redacted]	IT Classroom Course Evaluation	0 / 4 = 0%
GEN 300 / 744 / Mar 18, 2019	[redacted]	IT Classroom Course Evaluation	9 / 9 = 100%

6. To obtain a detailed view of the results for a particular course, click on the **Response Data** dropdown box. You can choose to view the data in the form of a graph or as an Excel spreadsheet.

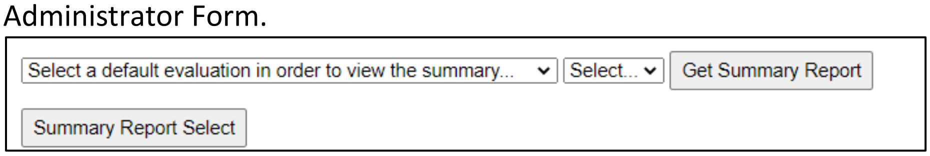


7. You can also view a summary of the responses for all courses that used the same evaluation form, within the time period selected. For this, scroll to the bottom of the sections that correspond to your search criteria (from step 5 above) and click **Summary Report Select**.

   a. Select the course evaluation form for which you want the summary (the title in the dropdown list tells you how many courses are included in the summary).

   b. Select the type of report, Graph or Excel.

   c. Click **Get Summary Report** to view the full report. Close the summary report window when you are done to return to the main Course Evaluation Administrator Form.



Admin - Default emails

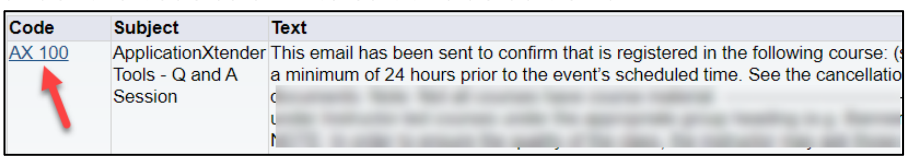
The default emails page is shared by all course administrators from different units, but each unit will only see their own default emails.

Modify current default email

The Course Administrator for each unit will be able to modify the email text for the following default emails:

- ○ **R_APVR:** Training registration confirmation
- ○ **REG_CC:** Notification of a successful registration cancellation
- ○ **R_RJCT:** Not approved training registration/waitlist request
- ○ **R_CRSAPP:** This course requires course approval
- ○ **WAIT**: Waitlist
- ○ **ONLINE:** Online course for myCourses
- ○ **HOLD:** On hold
- ○ **R_INSTOR:** Training teaching confirmation
- ○ **D_INSTOR:** Training teaching cancellation

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin – Default Emails**.
3. Select which default email you would like to modify and click on the code name link under the Code column to edit this default email.



Code	Subject	Text
AX 100	ApplicationXtender Tools - Q and A Session	This email has been sent to confirm that is registered in the following course: (a minimum of 24 hours prior to the event's scheduled time. See the cancellatio

4. Make your changes to the Subject and Body Text.
   You can use the following variables:
   - Registrant name: **<**REGIS_NAME**>**
   - Course: **<**CRSE_NUM**>**
   - Start date: **<**SDATE**>**
   - Time: **<**STIME**>**
   - Location: **<**LOCN**>**
   - Instructor(s): **<**CRSE_INSTOR**>**
   - FOAPAL: **<**foapal**>**

   Note: you will not be able to edit the Code name.

5. Click **Save Email Template**.

Create a new default email

Note: When creating a default email, use the same code as the course level (e.g. WMS 300) in order to appear in the **Instructor - Classlists** and **Admin - Process Training Requests** page.

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin – Default Emails**.
3. Click **Add New** from the bottom of the page.
4. Fill in the following information:
    - **Code**: enter “G_[up to 6 other characters]”.
      Note: you can only create a code that is not in use. To check existing codes, click **Codes in use…** drop down list.

    - **Subject**: enter your email subject.

    - **Body Text**: Enter your message for the registrants.

      You can use the following variables:
        - Registrant name: <**REGIS_NAME**>
        - Course: <**CRSE_NUM**>
        - Start date: <**SDATE**>
        - Time: <**STIME**>
        - Location: <**LOCN**>
        - Instructor(s): <**CRSE_INSTOR**>

    - **Role Class**: the role class is the Subject Code. Select the Subject Code that this default email belongs to (e.g., WMS 300 = WMS Web Services) for this default email.
5. Click **Save Email Template**.

Note: Once you create and save the email as the default, you will not be able to modify the Code.

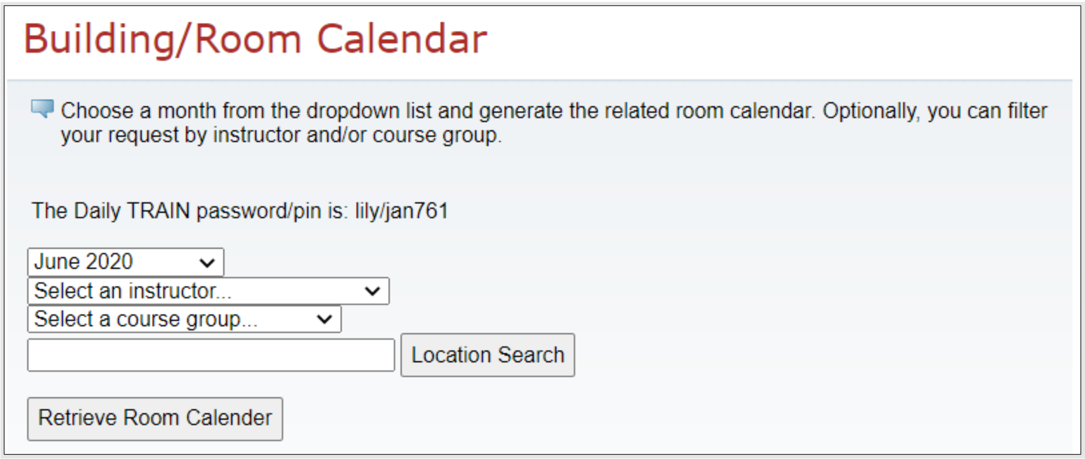
Delete default email

1. From the Minerva main menu, click **Training** tab.
2. Click **Admin – Default Emails**.
3. Click on the code name link under the **Code** column you want to delete.
4. Click on the down-arrow next to **Role Class** to select the role class the code belongs to.
5. Scroll to the bottom and click **Delete Email Template**. Click **OK** to confirm the deletion.

Instructor - Building/ Room Calendar

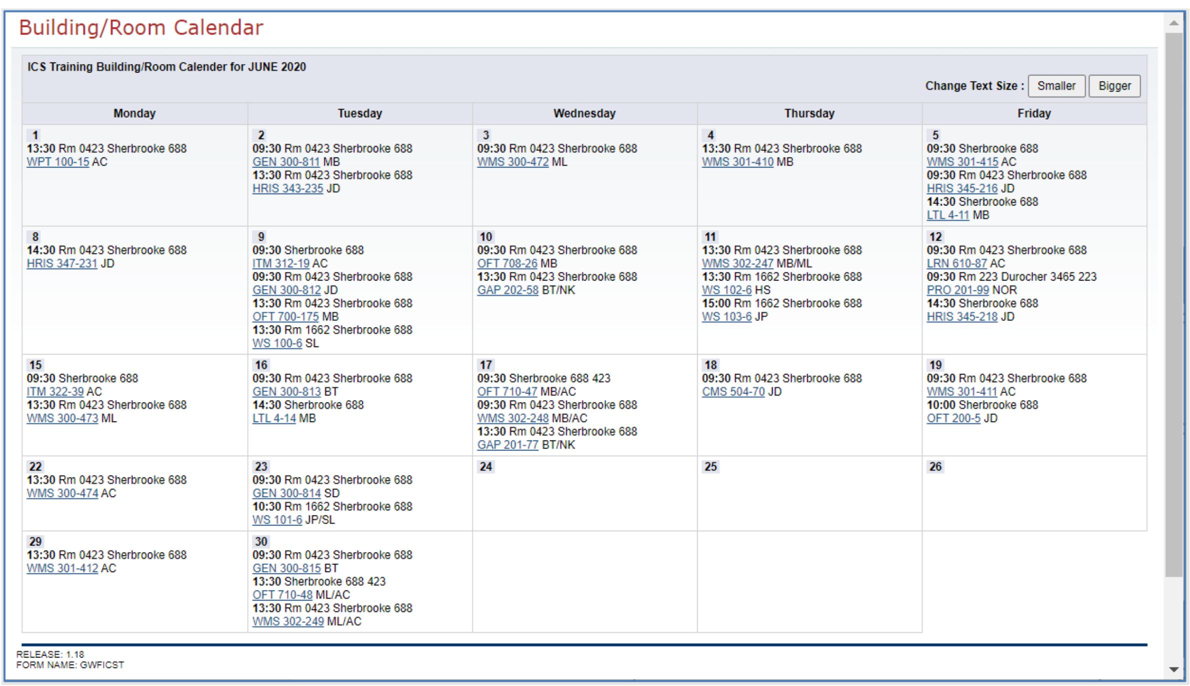
The instructor and the course administrator will be able to generate the training calendar of the month.

1. From the Minerva main menu, click **Training** tab.
2. Click **Instructors – Building/Room Calendar**.
3. Choose your search criteria:



   a. Choose a month from the drop-down list to generate the training calendar of that month.
   b. Optionally, you can filter by the instructor and/or course group.

4. Click **Retrieve Room Calendar.**
5. You will see your search result calendar.

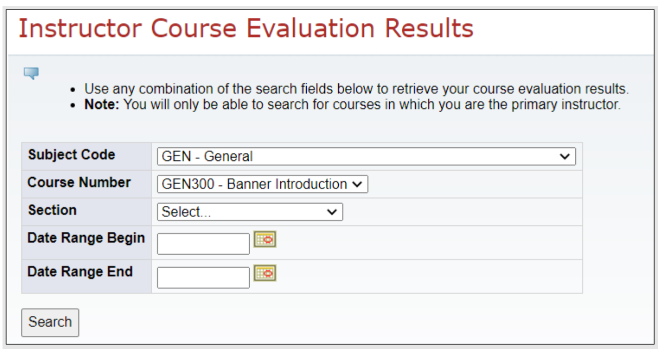


Instructor- Evaluation/Questionnaire Results

The instructors will only be able to view evaluations for courses in which they are the primary instructor.

Note: It is strongly recommended to do a narrow search by entering as many search criteria as possible. Otherwise, if your search is too broad, the report will take a long time to generate, and it may be very large.

1. From the Minerva main menu, click **Training** tab.
2. Click **Instructor – Evaluation/Questionnaire Results**.
3. Choose your search criteria:



   a. Select the **Subject Code**, and then the **Course Number** will appear for you to choose. You can only view evaluations for courses in which you are the primary instructor.
   b. Once you select the **Course Number**, you can then select a particular **Section** within that course.
   c. Specify the **Date Range Begin** and **Date Range End**, to retrieve results of the evaluations completed between those dates.

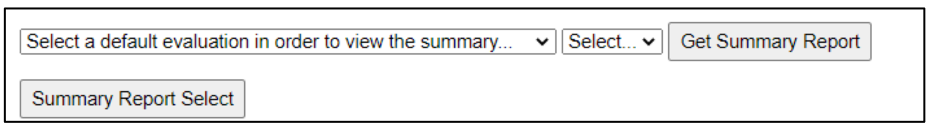
4. Click **Search** to retrieve a list of all the sections that match your criteria.
   Each row of the table that appears shows the subject and **Course** number, the **Section** number and the **Date** given, the **Primary Instructor**, the **Default Evaluation Used**, and **Response Data** (the ratio and percentage of the number of trainees who filled out the survey out of the total class attendees).

5. To obtain a detailed view of the results for a course, click on the **Response Data** dropdown box. You can choose to view the data in the form of a Graph (web page) or as an Excel spreadsheet.

Course/Section/Date	Primary Instructor	Default Evaluation Used	Response Data
GEN 300 / 745 / Mar 25, 2019	[illegible]	IT Classroom Course Evaluation	6 / 6 = 100%
GEN 300 / 749 / Apr 29, 2019	[illegible]	IT Classroom Course Evaluation	8 / 8 = 100%
GEN 300 / 769 / May 02, 2019	[illegible]	IT Classroom Course Evaluation	2 / 2 = 100%

6. You can also view a summary of the responses for all courses that used the same evaluation form, within the time period selected. For this, scroll to the bottom of the sections that correspond to your search criteria (from step 5 above) and click **Summary Report Select**.

    - Select the course evaluation form for which you want the summary (the title in the dropdown list tells you how many courses are included in the summary).
    - Select the type of report, Graph (web page) or Excel.
    - Click **Get Summary Report** to view the full report. Close the summary report window when you are done to return to the main Course Evaluation Administrator Form.



Note: If you click **Search** without selecting any criteria, the list returned will contain all course sections for which you are the primary instructor.

Instructor - Classlists

The instructors and course administrative staff will be able to:

- View the class list: see names of registrants and location details for a specific course section.
- Manage registration and attendance as follows:
    - View the class list
    - Register an employee in a course section
    - Delete a registrant
    - Update attendances
    - Send email to registrants
    - View registrants and attendance counts
    - Add/edit section comments

View the class list

1. From the Minerva main menu, click **Training** tab.
2. Click **Instructor - Classlists**.
3. Each section of a course has a unique section number. Use the drop-down lists to select:
    - Subject
    - Course Number
    - Section Number: such as "13", or "888" (waitlist) or "998" (one-on-one) or "All Sections"
4. You will see your class list based on your search result.

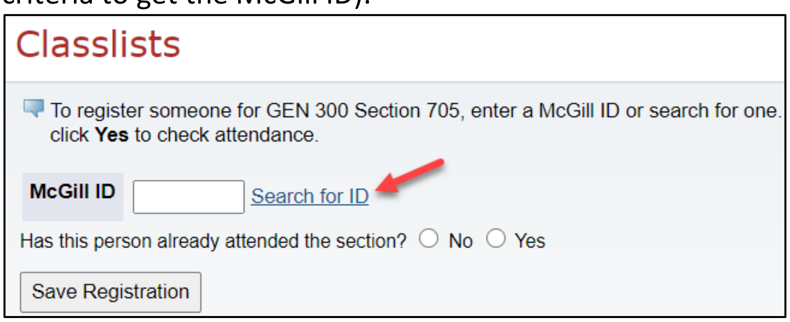
Manually register an employee

This is sometimes necessary if:

- A new employee needs to take a course but has not received their McGill ID yet.
- The employee has a McGill ID but for some reason asks you to do it.
- An employee shows up for a course section without registering. (In this case, the instructor enters the name and McGill ID, if any, in the Comments so the employee can be registered officially later).

If the employee has a McGill ID:

1. From the Classlists page, display the class list for the desired section.
2. Click **Add Registration** above the class list.
3. In the subsequent screen:
    a. Enter the McGill ID (If you don't know it, click **Search for ID** and enter the criteria to get the McGill ID).



Note: Use the wildcard **%** when searching for Last Name and First Name (e.g. %Smith% %Jane%). Select the McGill ID.

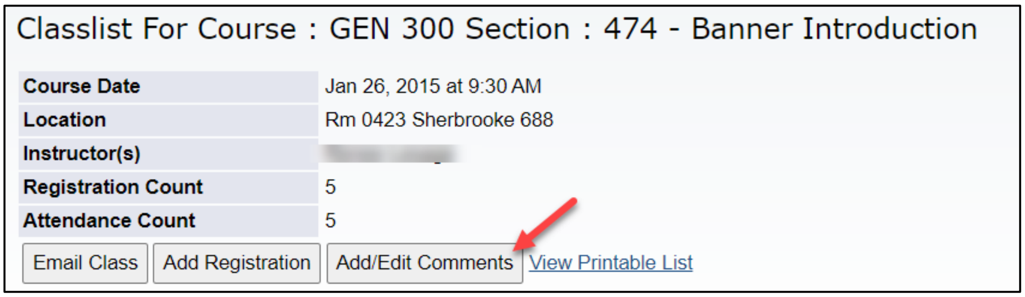
    b. Use the radio buttons to indicate whether the employee has already attended the course. If you select "Yes", when you return to the class list, the **Attendance** checkbox will already be selected.

c. Click **Save Registration**. A message confirms the registration.

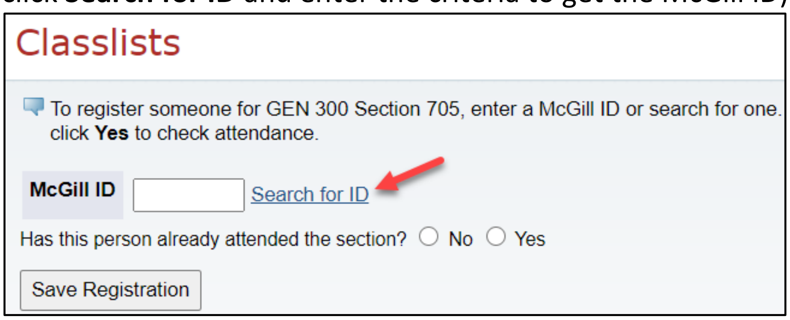
4. The person's name is now added to the class list. You do not have to click **Update Registration and Attendances**.

If the employee has no McGill ID:

1. From the Classlists page, display the class list for the desired section.
2. Click **Add/Edit Comments** and enter the person's name in the section comments. Click **Save Comments.**



3. After the section takes place (assuming the trainee now has a McGill ID), click **Add Registration** above the class list. If no ID is assigned yet, you will have to do this when the McGill ID is assigned at a later date.
   a. In the subsequent screen, enter the McGill ID (If you don't know it, click **Search for ID** and enter the criteria to get the McGill ID).



Note: Use the wildcard **%** when searching for Last Name and First Name (e.g. %Smith% %Jane%). Select the McGill ID.

   b. Use the radio button '**Yes'** to indicate that the person has already attended the course. The **Attendance** checkbox will be selected on the Classlists page.

   c. Click **Save Registration**. A message confirms the registration.

Note: It is important to register the employee retroactively, so that the course shows up on the employee's training record, and they can get appropriate system authorizations which depend on taking specific courses.

Delete a registration

If the registrant has been confirmed in an upcoming course and you need to delete them from the class list:

1. From the Classlists page, [display the class list for the desired section](#).
2. Click to select **Delete Registration** for the employee you are removing.

Name	Phone #	Email	Registration Date	Attendance	Fee Charged?	Delete Registration?	Confirmation Email
[illegible]	[illegible]	[illegible]	Mar 15, 2021	☑	N	☐	Resend

3. Click **Update Attendances and Registrations**. A confirmation screen appears.
4. Click **Return to Classlists**.

Note: If you delete the wrong person you will have to add them again. There is no way to "undo" this action.

Update attendance

After the course is given, use the trainer's class list to enter the actual attendance in the class list.

1. From the Classlists page, [display the class list for the desired section](#).
2. For each registrant who attended, select the **Attendance** checkbox.

   Note: If an employee registered but did not attend, do not delete his registration from the class list. The Employee Training Record should include courses an employee registers for but does not attend.

3. If anyone attended without registering (the names are indicated by the instructor in the Comments), [manually register them in the course](#) and mark their attendance.

Send/resend email

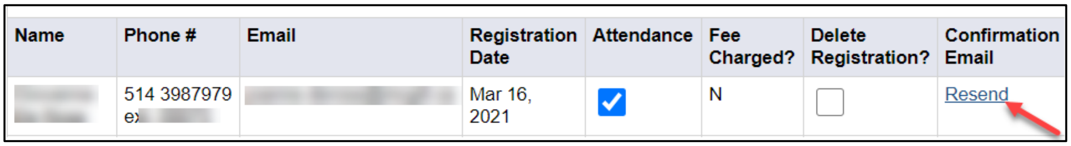
Send/Resend confirmation to an individual:

You may need to send or resend the Outlook calendar registration confirmation to an individual under the following circumstances:

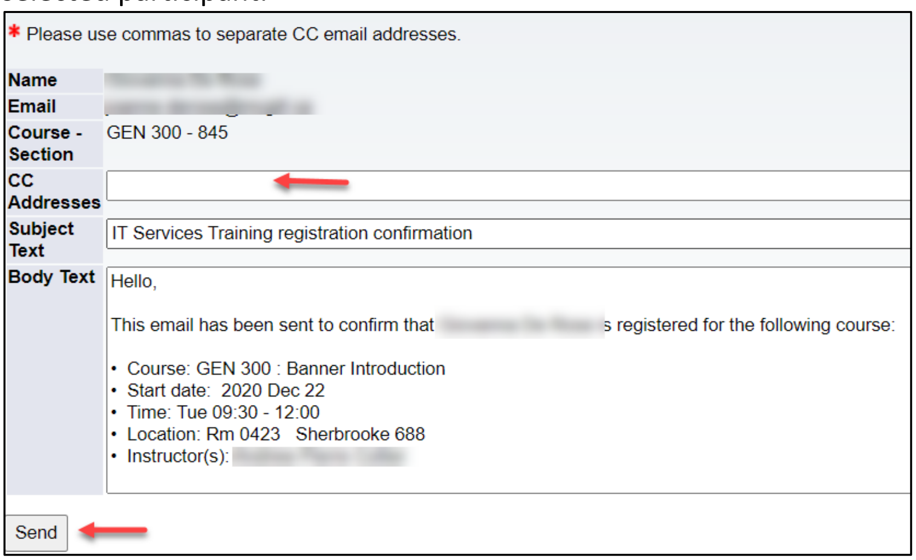
- In cases where the standard confirmation email has been returned because of an incorrect email address, you may be able to find a different email address(es) for that person in the Banner form ***GOAEMAL*** and **Resend** the confirmation using that email address.

- In cases where you manually add the participant in class list, you can send the training confirmation email to that individual by using the **Resend** function.

1. From the Classlists page, display the class list for the desired section.
2. Click **Resend** in the row containing the registrant's name. The standard email confirmation message is displayed with the default email for that person.



3. If you have obtained a different email address for the person, you may enter it in **CC Addresses**.
4. Click **Send**. The system will send a training confirmation Outlook calendar invite to the selected participant.

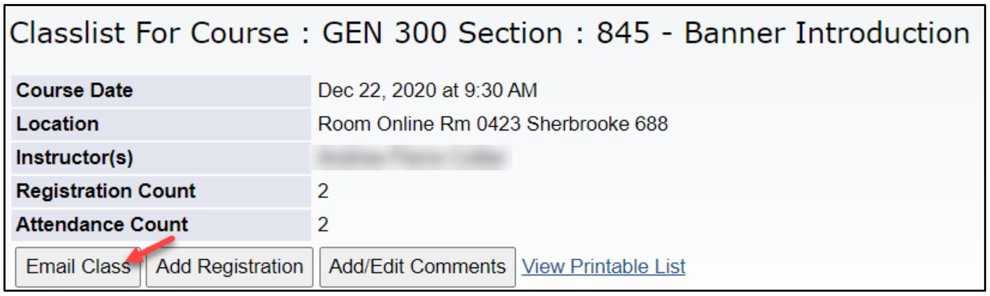


<u>Email one or all sections of a course:</u>

- To notify all registrants, to an upcoming section, of course cancellation, location change or schedule change.
- To notify all past participants, in all sections of a course, to take a course again (for instance, when there are significant changes in Banner functionality).
- To send an Outlook calendar invitation for training confirmation to the participants, if you have manually added them to the class list.

1. From the Classlists page, display the class list for the desired section.

2. Click **Email Class**.


Classlist For Course : GEN 300 Section : 845 - Banner Introduction

Course Date	Dec 22, 2020 at 9:30 AM
Location	Room Online Rm 0423 Sherbrooke 688
Instructor(s)	[illegible]
Registration Count	2
Attendance Count	2

3. In the next screen,
    a. Click the radio button for the message type you wish to send, or enter the desired text
    b. Click
        - **Send Email to Classlist** (this will send only an email reminder)
        - or **Send Email & Outlook calendar notification** (this will send an Outlook calendar registration confirmation)

4. Click **Go Back** to return to the class list.

View headcounts for all scheduled sections

You can generate a listing of total Registration Count and Attendance Count for all the scheduled course sections and all upcoming course sections with their "headcounts" (number of registrants).

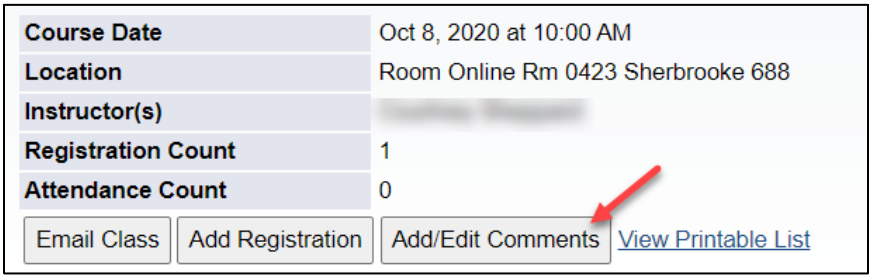
1. From the Minerva main menu, click **Training** tab.
2. Click **Instructor - Classlists**.
3. From the Classlists page, use the drop-down lists to select the:
    a. Subject
    b. Course Number
    c. Section Number: select **All Sections**.
4. You will see a list of people who have registered for the course as well as a total **Registration Count** and **Attendance Count** above the list of names.

Add or edit section comments

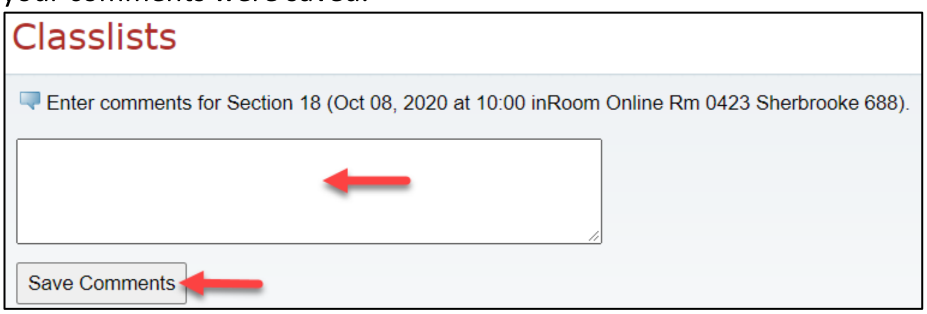
You can use the Section Comments area to enter such information as:

- Names of employees who wish to take the course but do not yet have a McGill ID to register online.
- (For LAB courses) Enter details of registrant, time, and area of interest. Example: Jane Banner, 10 a.m., SIS 379 - Admission Application Forms.

1. From the Minerva main menu, click **Training** tab.
2. Click **Instructor - Classlists**.
3. Each section of a course has a unique section number. Use the drop-down lists to select:
    1. Subject
    2. Course Number
    3. Section Number
4. Click **Add/Edit Comments.**



5. In the next screen, enter your comments and click **Save Comments**. A message confirms your comments were saved.



Admin - Reports

In the Minerva registration system, the course administrator will be able to produce the following reports:

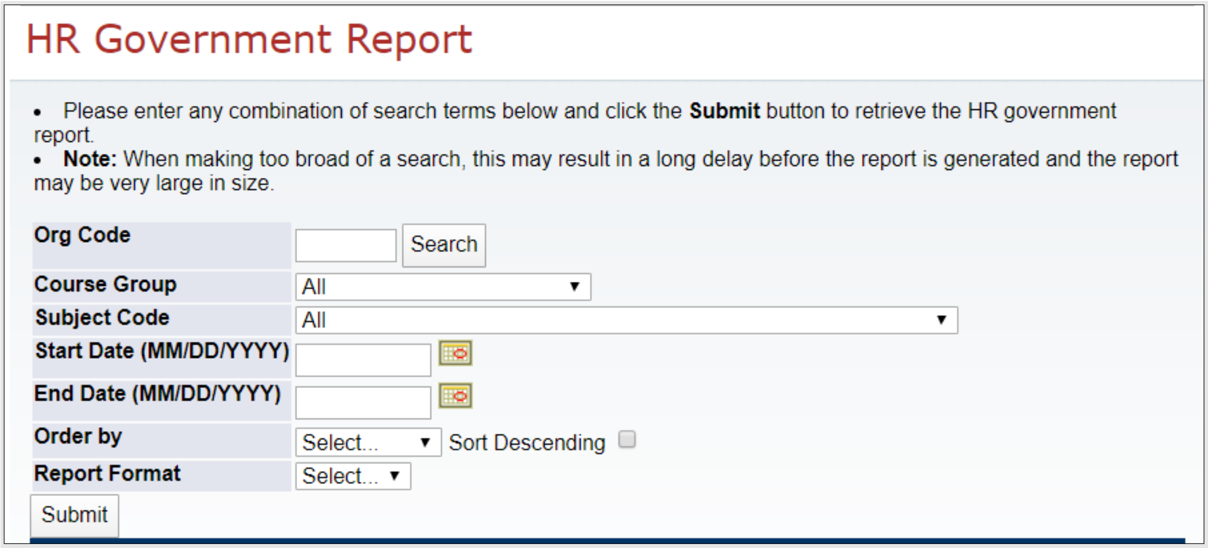
- HR Government report
- Instructor report
- Overall report
- Charge report

HR government report

The course administrator will be to view and print a list of all McGill employees who have attended training.

View a list of McGill employees who have attended training

1. From the Minerva main menu, click **Training** tab.
2. Click **Reports – HR Government**.
3. Enter any combination of search criteria (**Org Code** , **Course Group**, **Subject Code**, etc.) to limit the list of employees returned.



Note: It is strongly suggested that you limit your search by entering as many search criteria as possible. Otherwise, if your search is too broad, there may be a long delay before the report is generated and the resulting report may be very large.

- **Org Code:** This is the department code. If you are limiting your report to a specific department, you will need to enter this code. Click **Search** to find out the Org Code based on the name of the department.
- You can select either **Course Group** or **Subject Code**, but not both.
- **Start Date** and **End Date** set the time period for the report.
- In the **Order by** dropdown box, you can choose to sort the data in the report by ID, Last name, "Tcrt" code (Subject code + Number), course date or duration.
- Select a **Report Format**. You can view the report directly in your browser as a web file or you can download the report as an Excel spreadsheet.

4. Click **Submit** to retrieve the HR government report.
5. To print the report from your browser or from MS Excel, click **File** > **Print**.

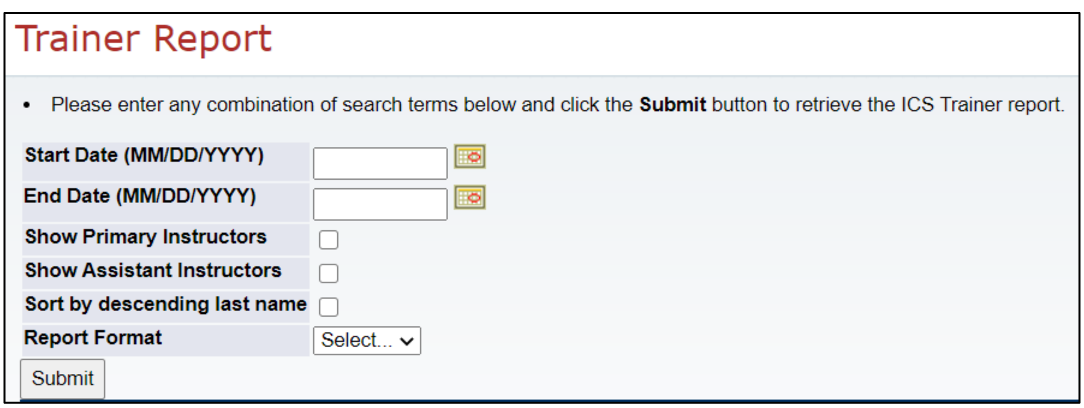
Instructor report

The course administrator will be able to view a distribution list of courses given by each trainer. Information retrieved in the report includes:

- Trainer's ID
- Last Name and First Name of the trainer
- Course Number
- Course Date
- Duration
- Primary Ind
  ("Y" if the trainer is the primary instructor, blank if the trainer is an assistant)

View a distribution list of courses given by each trainer

1. From the Minerva main menu, click **Training** tab.
2. Click **Reports – Instructor**.
3. Specify the **Start Date** and **End Date**, to retrieve the list of courses offered between those dates. It is strongly suggested that you limit the date range of your report. Otherwise, the report will take longer to generate, and it may be very large.
4. Check **Show Primary Instructors** to view only primary instructors' courses. If there is an assistant for the course, the assistant's name and information will not be listed.
5. Check **Show Assistant Instructors** to view only assistants' courses. The primary instructor will not be listed.
6. Check **Sort by descending last name** to reverse the order of the trainers in the list. By default, the list is sorted by last name, in ascending order.
7. Select a **Report Format**. You can view the report directly in your browser as a web file or you can download the report as an Excel spreadsheet.
8. Click **Submit** to retrieve the Trainer report.


Trainer Report

- Please enter any combination of search terms below and click the **Submit** button to retrieve the ICS Trainer report.

Start Date (MM/DD/YYYY)	
End Date (MM/DD/YYYY)	
Show Primary Instructors	
Show Assistant Instructors	
Sort by descending last name	
Report Format	Select...

Submit

Note: Checking both **Show Primary Instructors** and **Show Assistant Instructors** gives the same result as leaving both boxes unchecked.

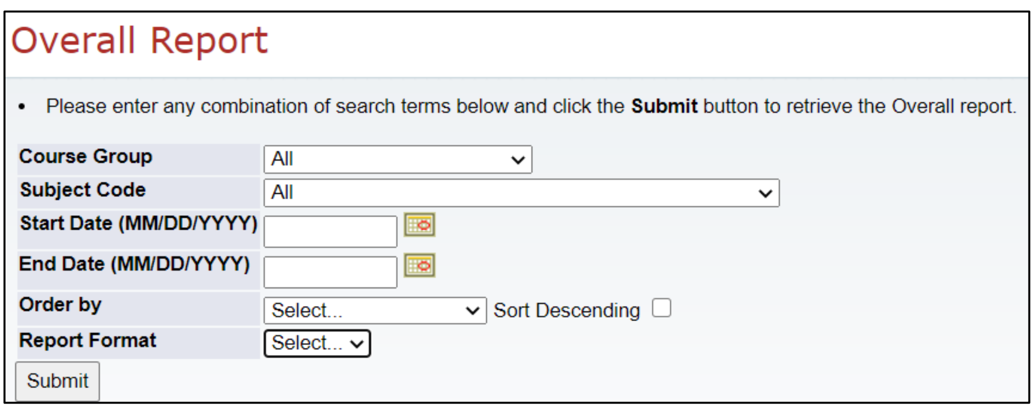
Overall report

The course administrator will be able to view an overall list of courses offered. Information retrieved includes the number of sections, registrations, attendees, one-on-ones, and online training.

View an overall list of courses offered

Select the criteria for your report (Course Group, Subject Code, Start Date, End Date). It is strongly suggested that you limit your search by entering as many search criteria as possible. Otherwise, if your search is too broad, the report will take a long time to generate, and it may be very large.

1. From the Minerva main menu, click **Training** tab.
2. Click **Reports – Overall**.
3. You may select either a **Course Group** or **Subject Code**, but not both.
4. Specify the **Start Date** and **End Date**, to retrieve a list of courses offered between those dates.
5. In the **Order by** dropdown box, you can choose to sort the data in the report by **Section Count** (the number of sections), **Section Registration** (the number of registrations), **Section Attendance** (number of attendees), **1-on-1 Section Count** (one-on-one courses are grouped)or **Online Count** (online training courses are grouped).
6. Select a **Report Format**. You can view the report directly in your browser as a web file or you can download the report as an Excel spreadsheet.
7. Click **Submit** to retrieve the Overall report.

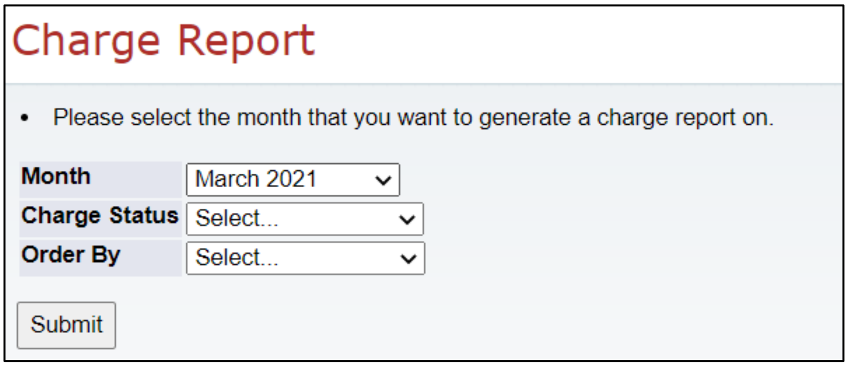


Charge report

The course administrator will be able to view a list of trainees who did not attend the training course, change the charged status as well as send an email to their supervisors informing them of charges.

1. From the Minerva main menu, click **Training** tab.

2. Click **Reports – Charge Report**.
3. Select the month that you want to generate a charge report for.
4. You may also select **Charge Status** (Show All, Show Not Charged, Show Charged).
5. You may also select **Order By** (Course Date, Trainee Last Name, Course).
6. Click **Submit**.



7. From the results page, you can:
    a. Click on the **Change** button to toggle the Fee Charged statuses.
    b. Click the link in the **Supervisor Email** column to display the email text that should be sent to the supervisor informing them of a penalty charge.

Note: If you have selected to only view the records that have not been charged ("Show Not Charged"), you will be able to generate the feed file using the **Generate Feed File** at the bottom of the screen.