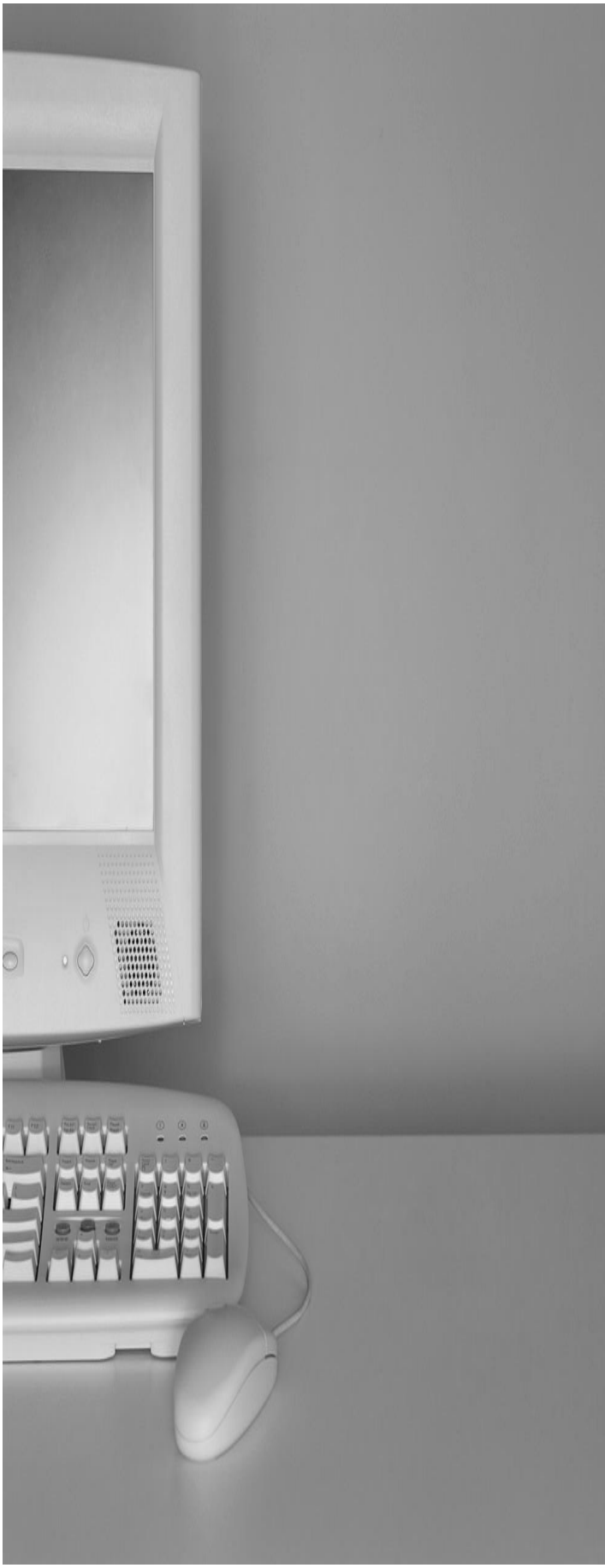
Pathlore Operations Manual

Governmental
Services
Center



Rev. 2-20-12

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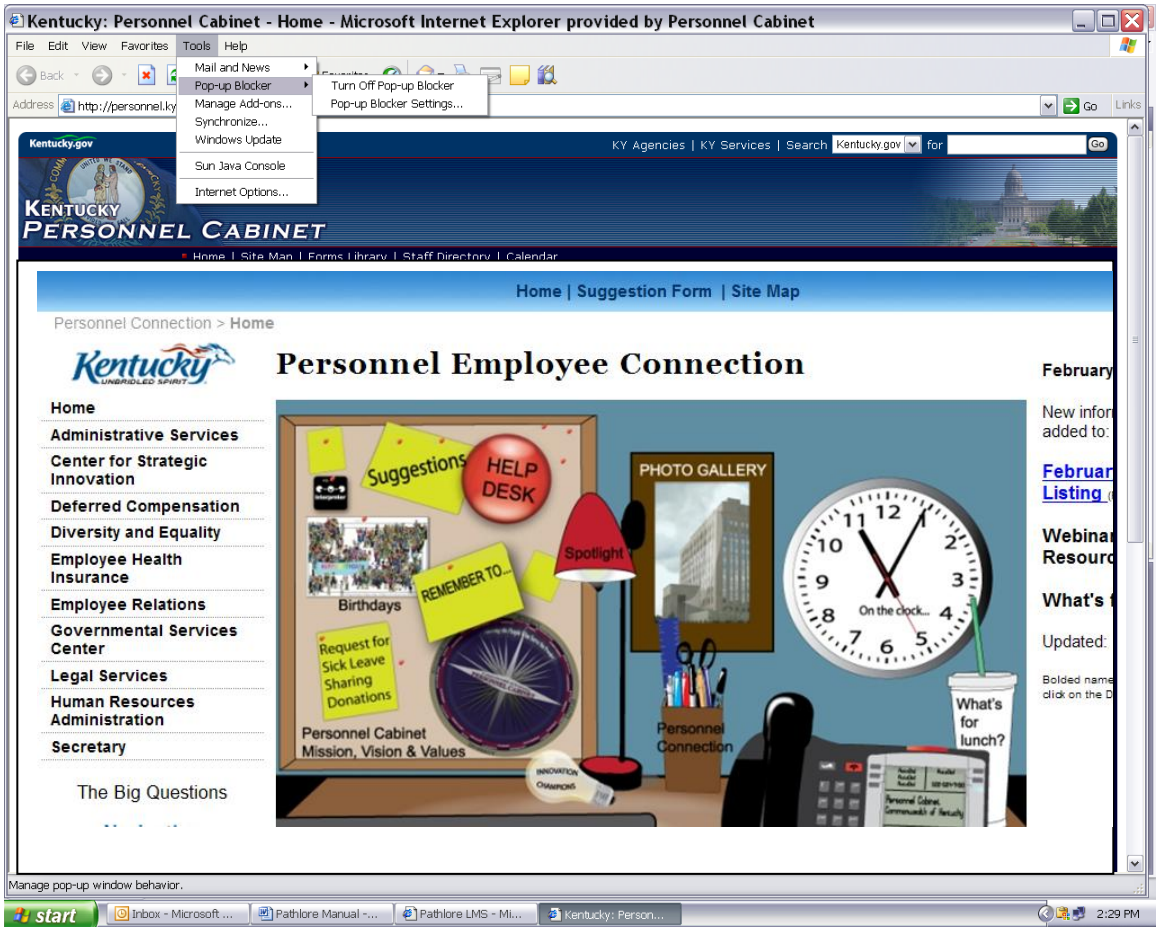
Current Web Address for Pathlore

The current web address for the Pathlore system is:
https://pers106.personnel.ky.gov/LMS/

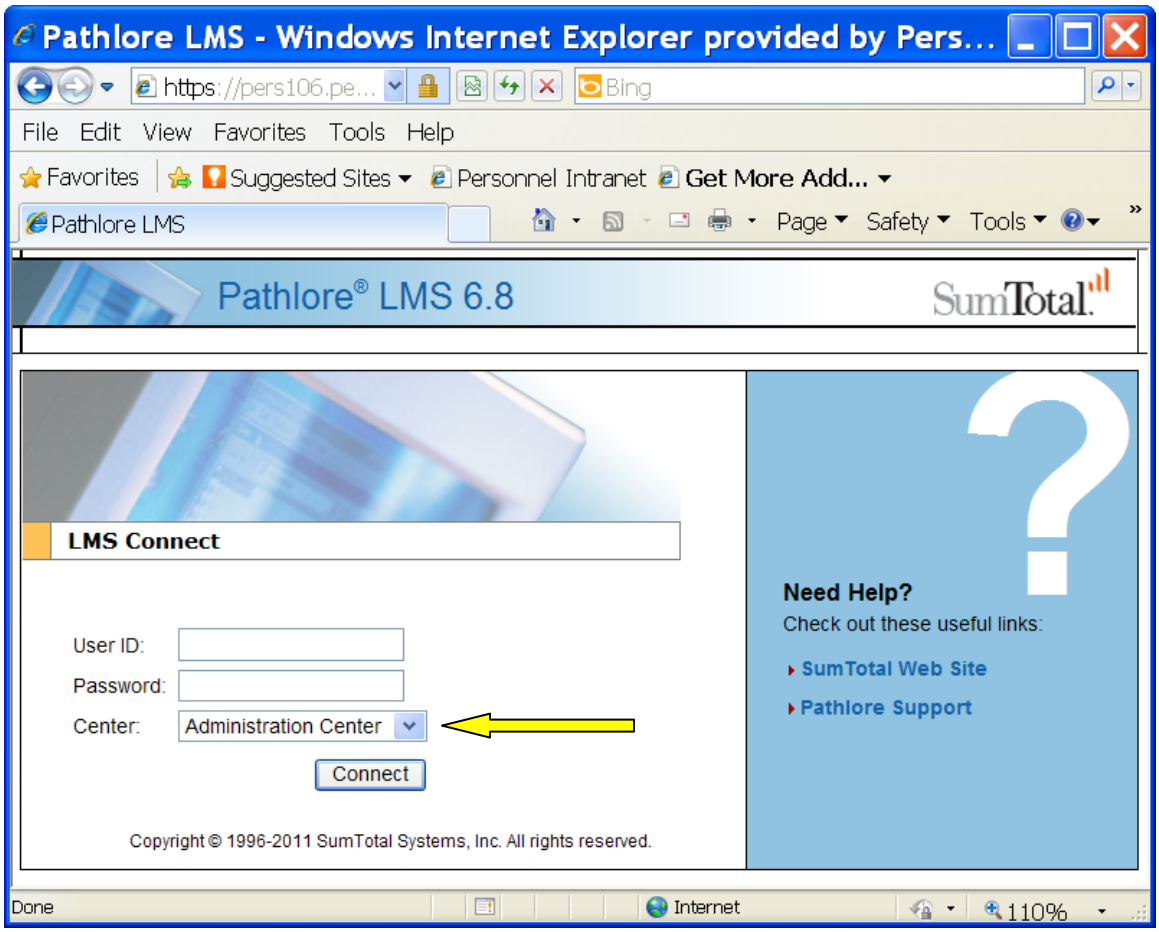
Please contact Kathy Hutcherson for password resets at
kathy.hutcherson@ky.gov

Pop Up Blocker

*POP UP BLOCKER – Pathlore LMS uses pop-up windows, so you need to make sure your **pop-up blocker is turned OFF** or you have set the Pop-up Blocker Setting to allow pop-ups from this site.

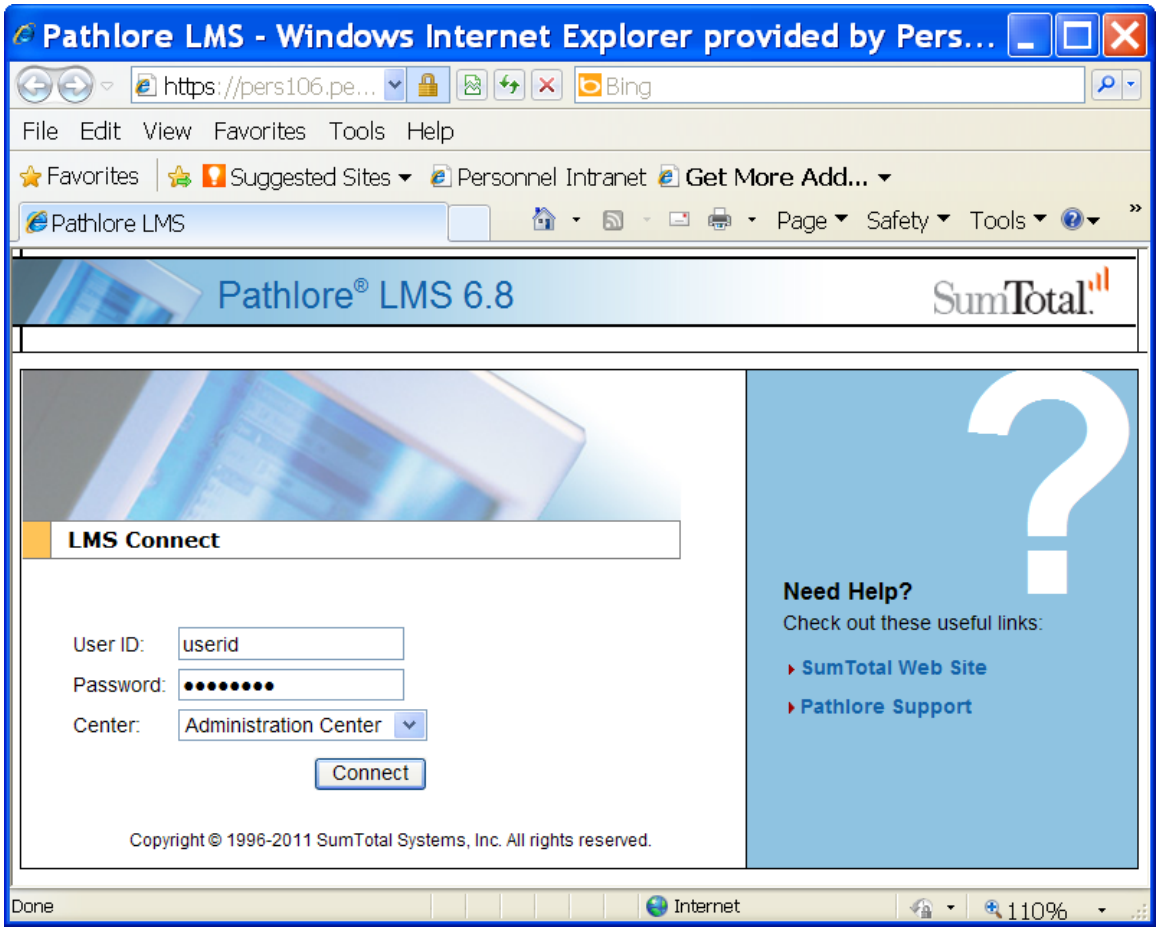


How to Log into Pathlore LMS



Make sure **Administration Center** is selected from the Center drop down list. The Administration Center is where you will work with person, class and registrations.

This is a onetime selection and will become the default for future logons.



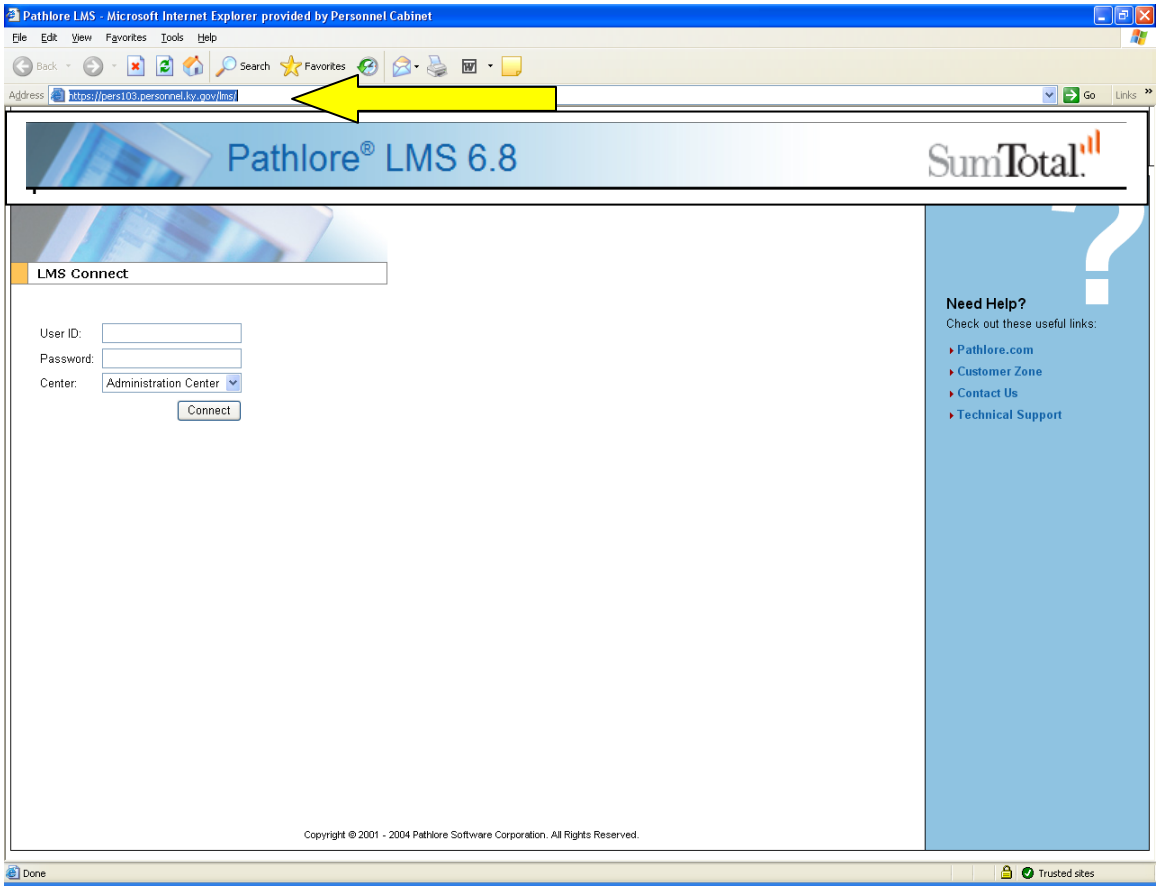
Key in your **user id and password**
Click Connect or hit Enter.

Note: Your password will expire every 31 days. Your password must meet the following requirements:

- Minimum of 8 characters
- Contain both upper and lower case alpha characters
- Contain at least one number
- Contain at least one special character

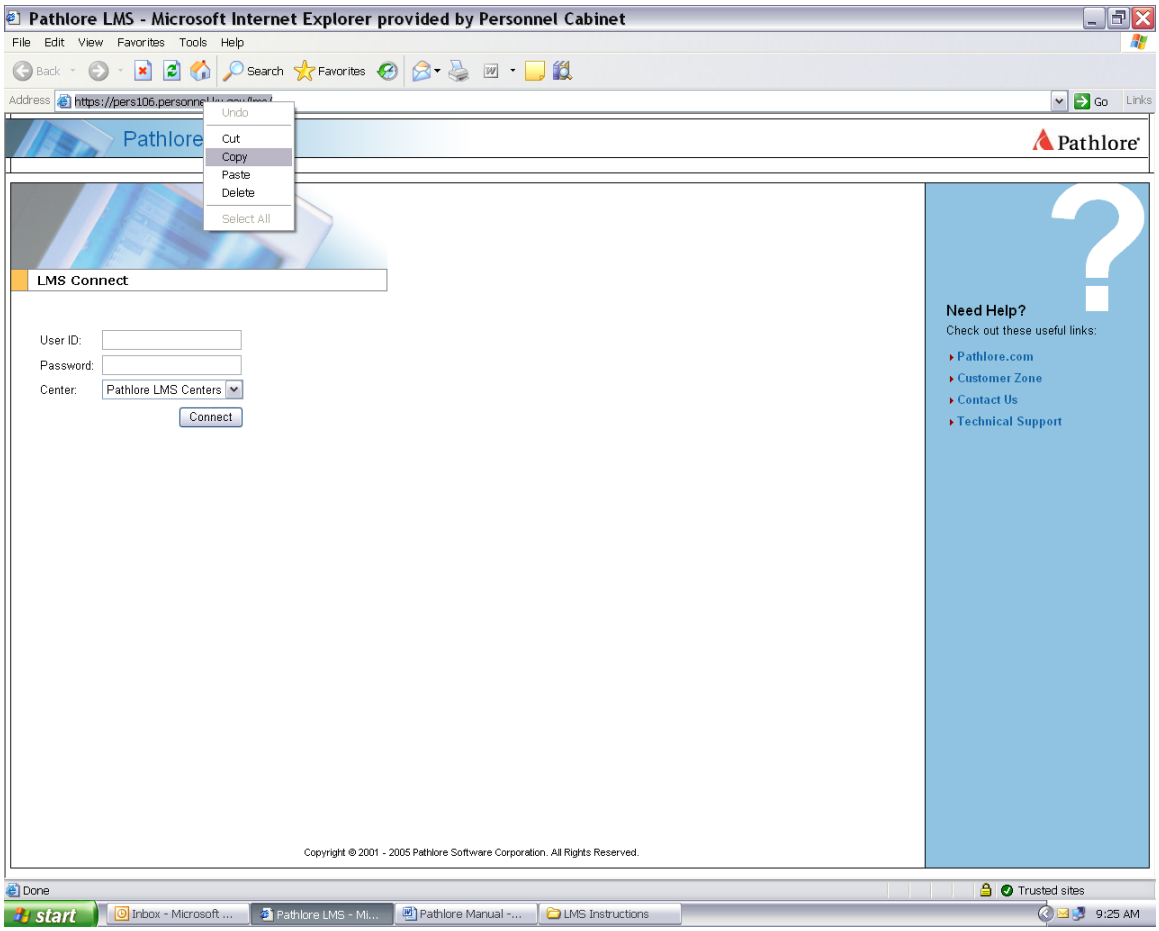
If you need to have your password reset, contact Kathy Hutcherson at 502-564-8170 ext 247.

To Create A Shortcut To Pathlore LMS On Desktop



Go to the Pathlore LMS log on screen
Highlight the Internet Address in the Toolbar.

Right click on the highlighted address and **select** Copy



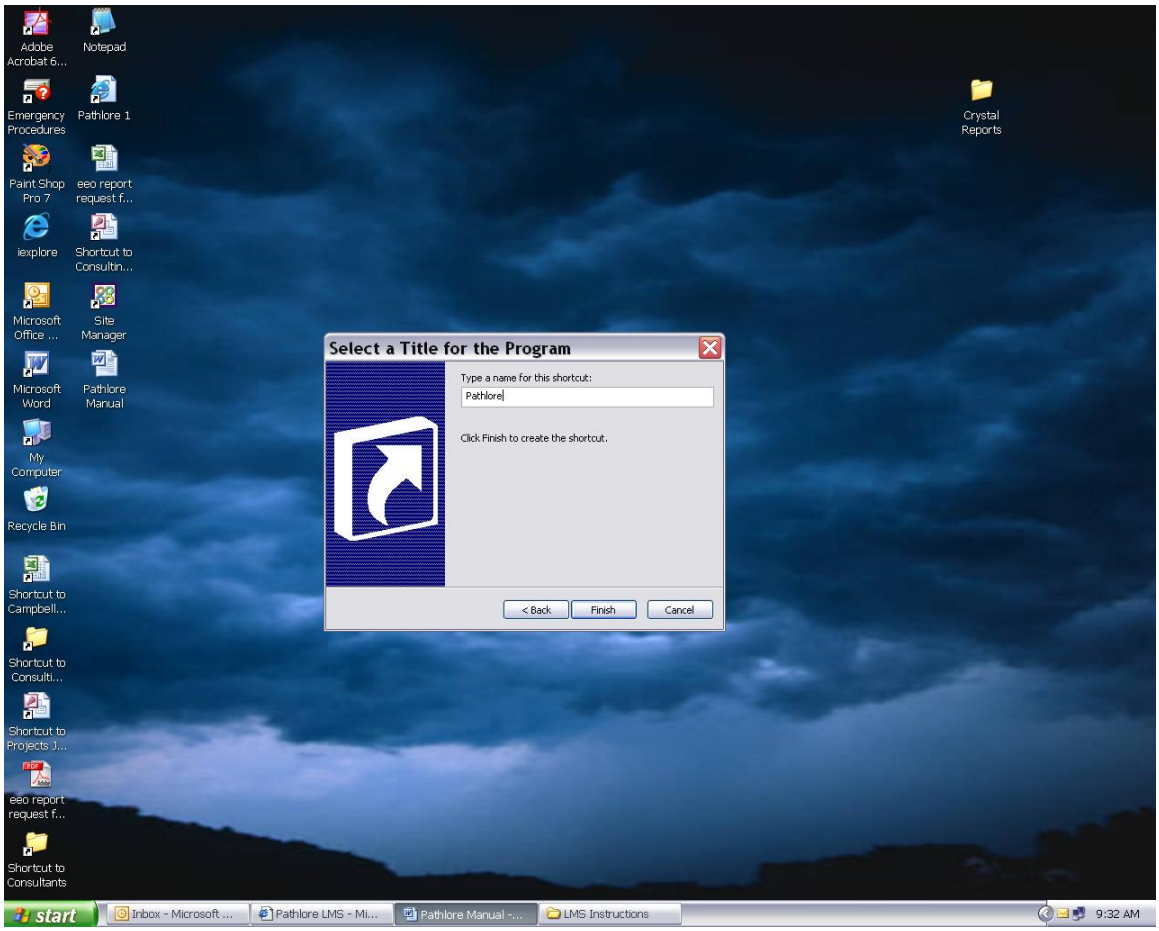
Minimize all of your open screens until you are looking at only your Desktop.

Right click on any blank space on your desktop and **select** New and then Shortcut.

Once the Create Shortcut box pops up, **paste** the Pathlore LMS website into the box or you can just type in the address: https://pers106.personnel.ky.gov/lms

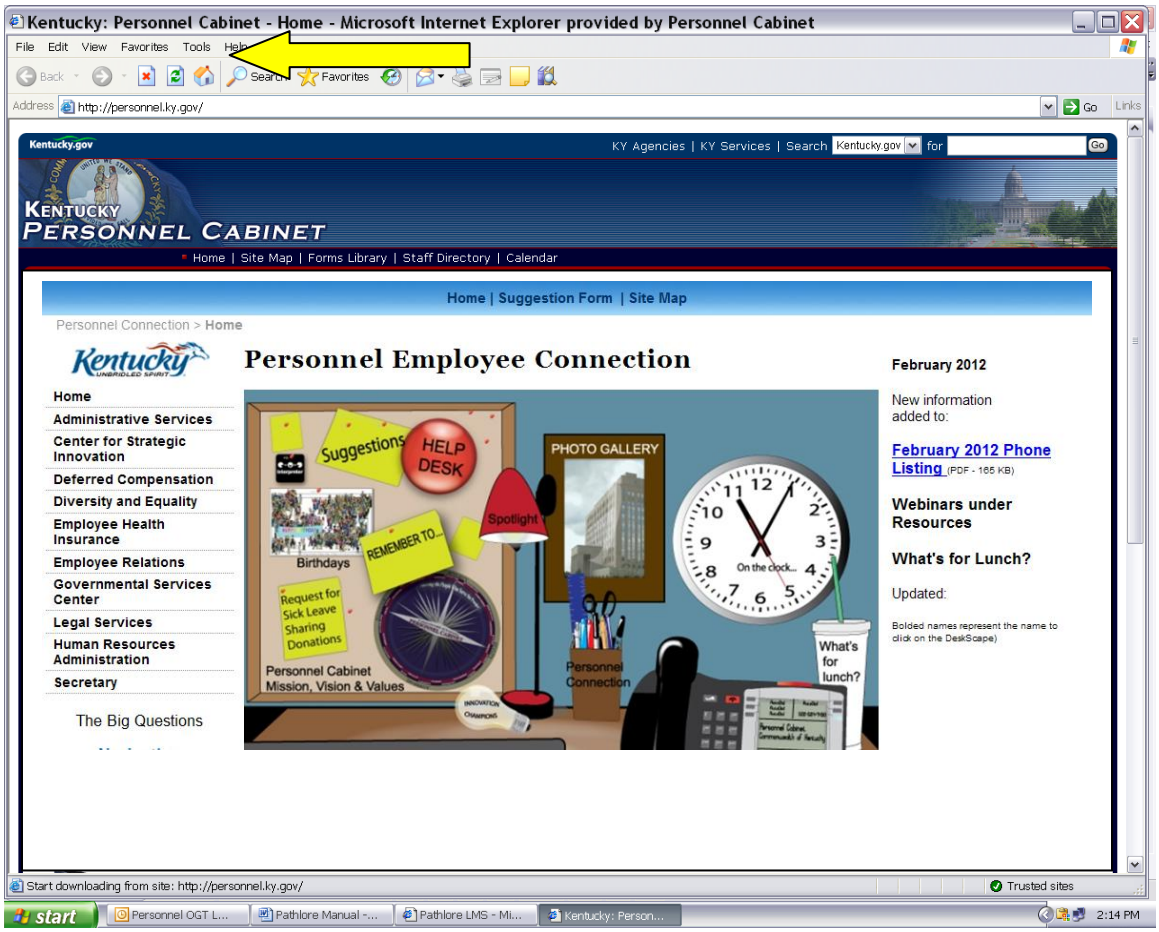
Hit the Next Button

Type in the name that you would like your shortcut to have

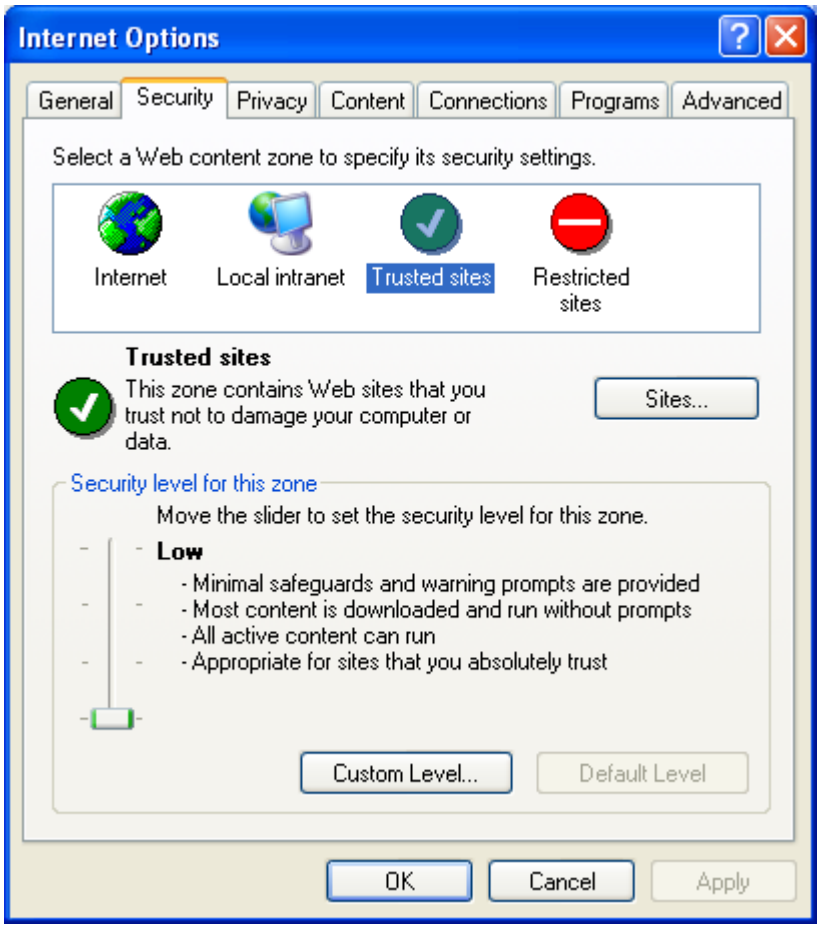


Hit the **Finish** button and the shortcut you just created will now appear on your desktop.

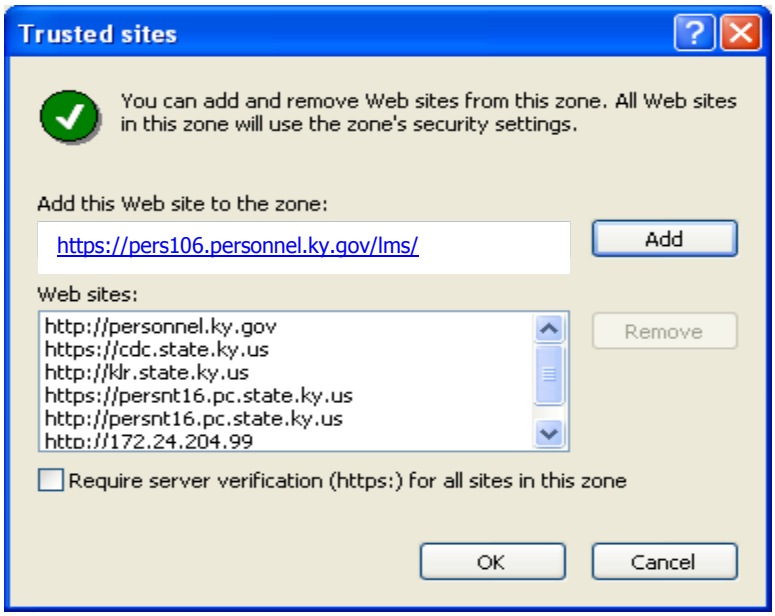
To Make Pathlore LMS a Trusted Site



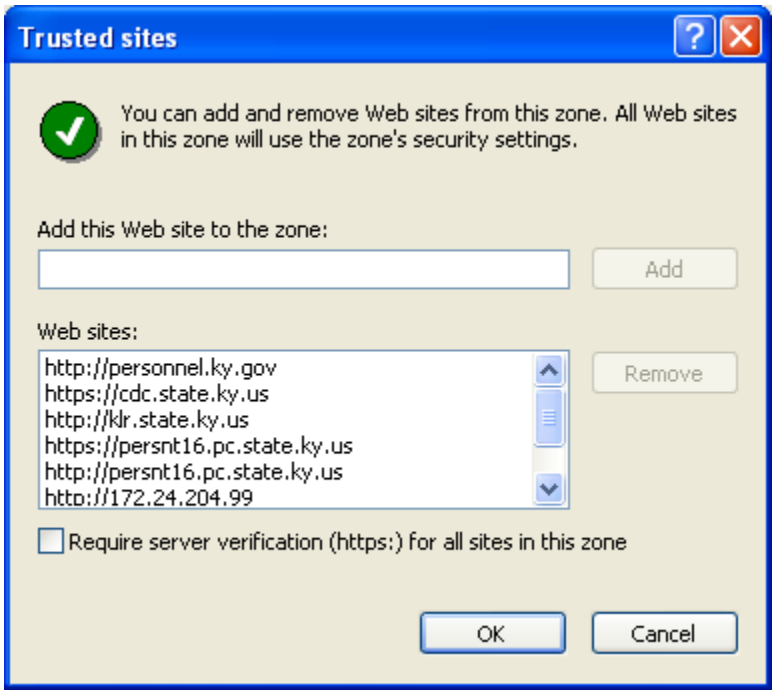
Choose Tools-Internet options



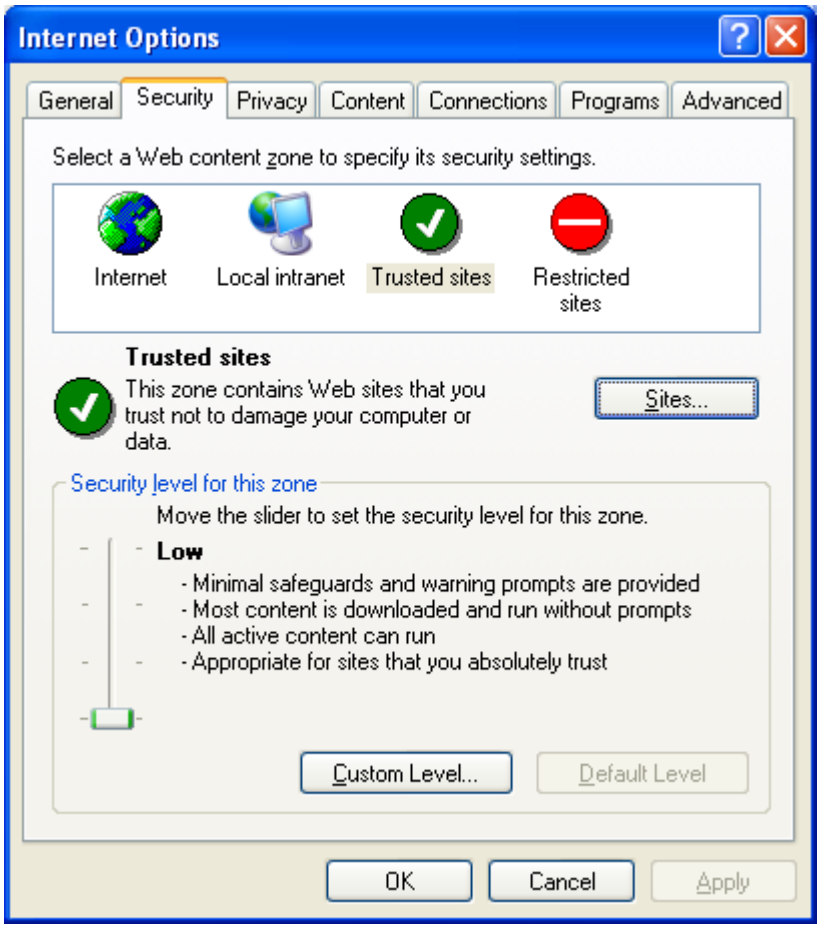
Choose the Security Tab and click on sites



Key https://pers106.personnel.ky.gov/lms/ into *Add this Web site to the zone*: **Click Add**



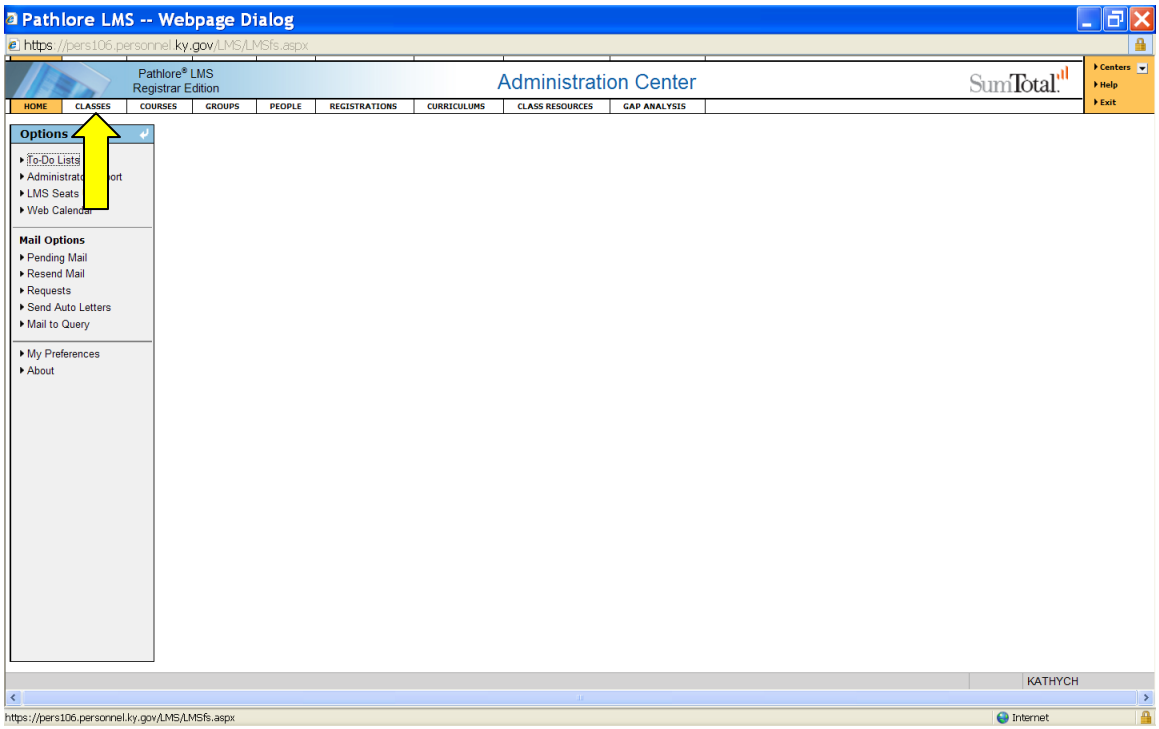
Click OK



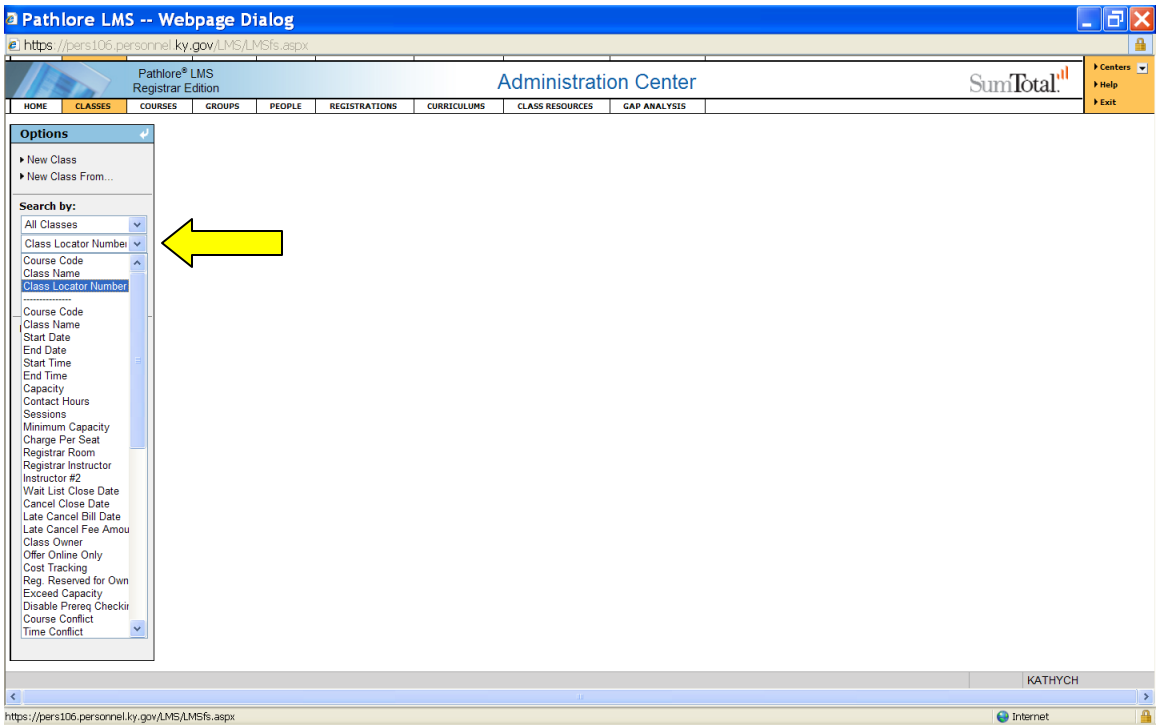
Click OK

Class Information

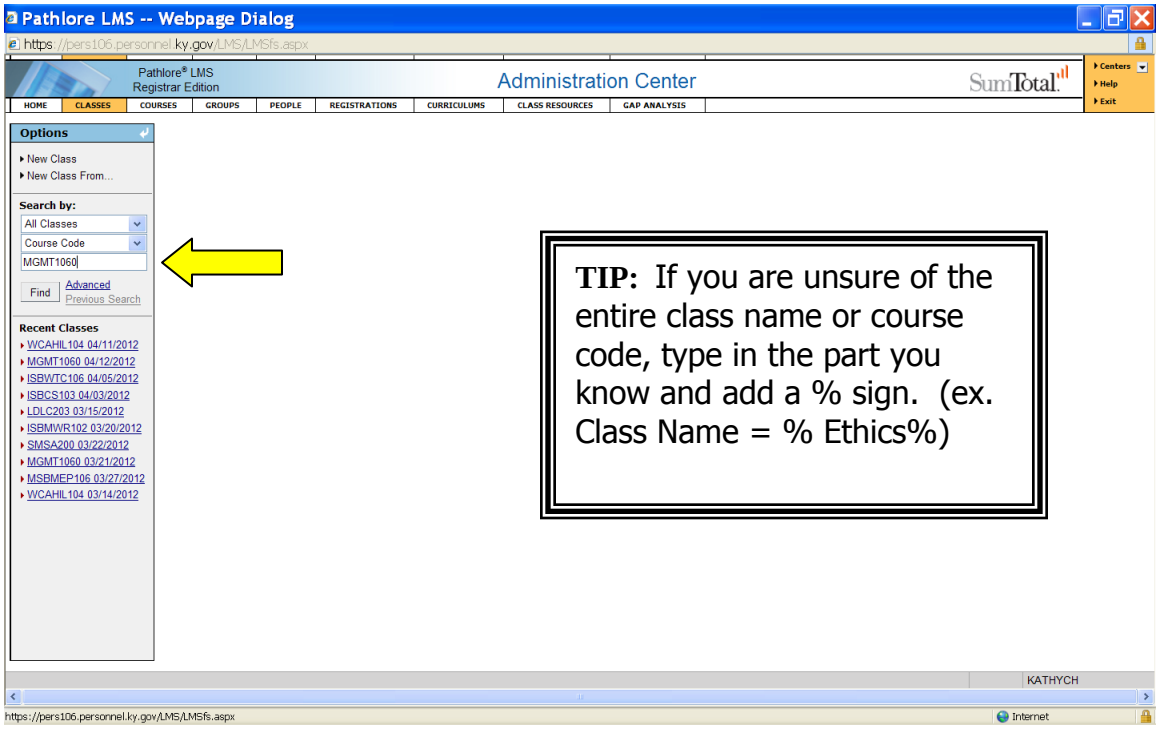
To access class information



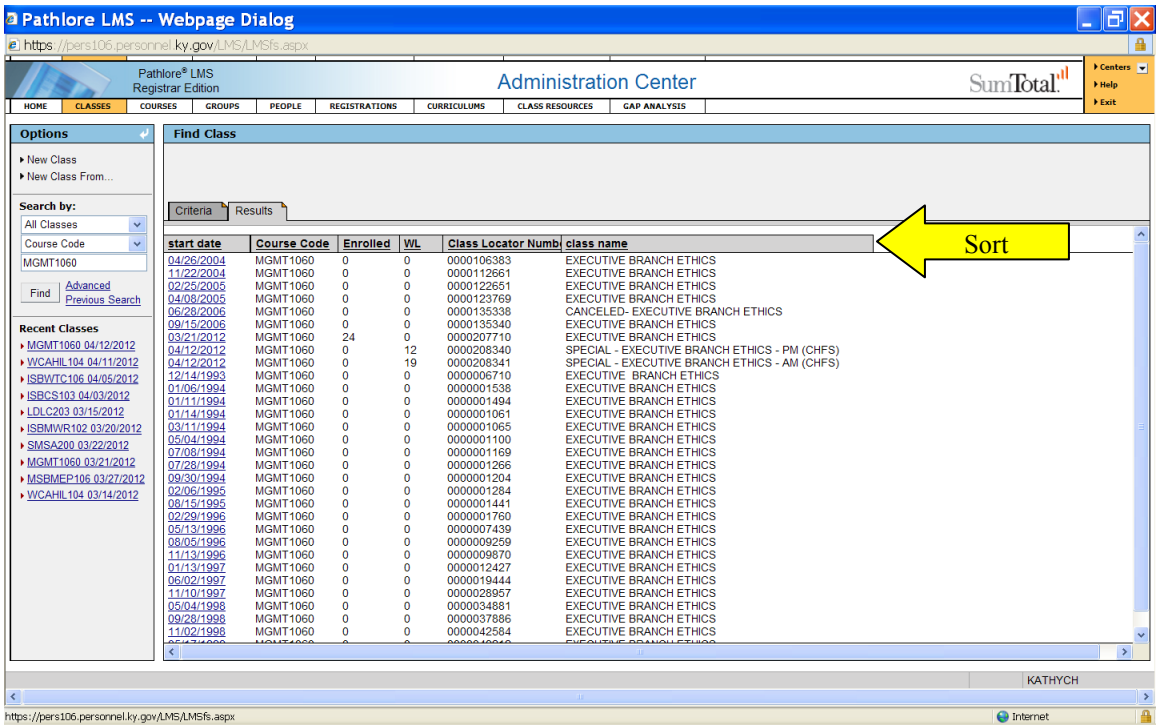
To access class information **click** on the class link



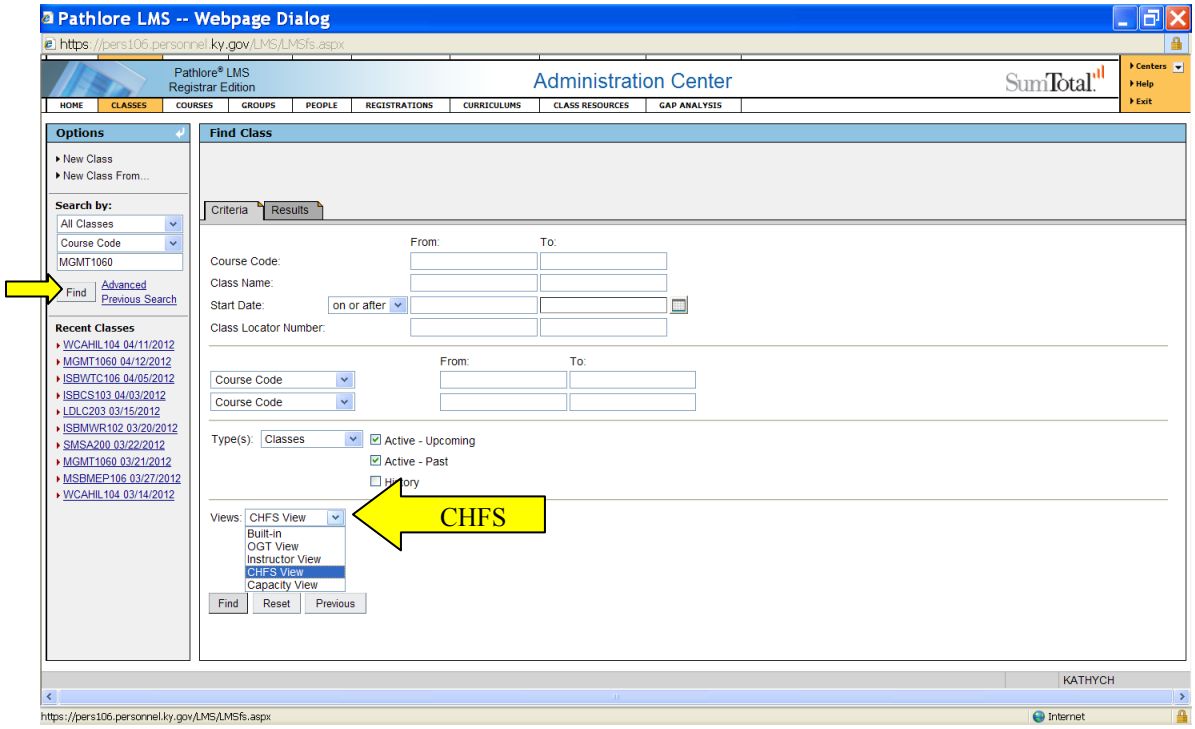
You can **search** for classes by name, course code or class locator number using the Search By drop down list.



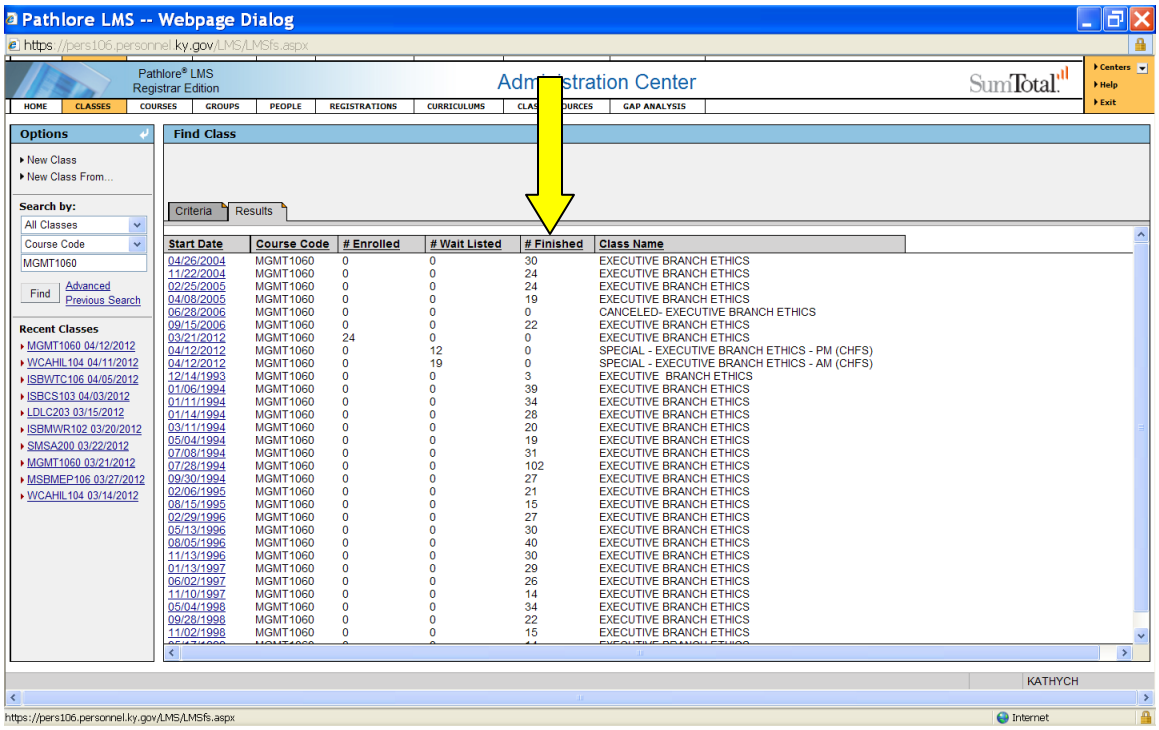
Key in course code or class name and **click** on the Find button



Click on the **Start Date** link to look at class information.
The Start Date, Course Code and Class Name links can be used to sort the columns.



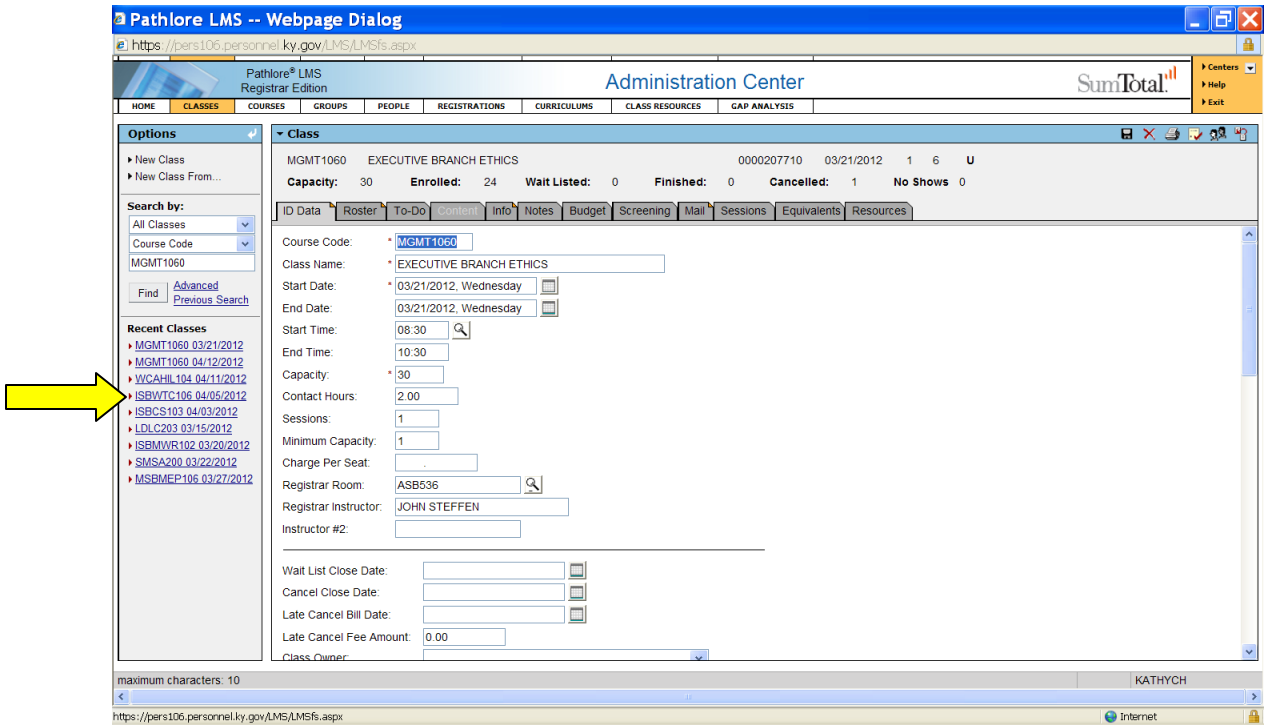
Click on the **Criteria Tab** and change your View to CHFS View. This view will allow you to see the numbers Enrolled/Wait Listed/Finished.
Click on Find to view the new results.



Click on the **# Finished header** and the data is sorted by # Finished.

Click on the **Start Date** link to view class information by start date.

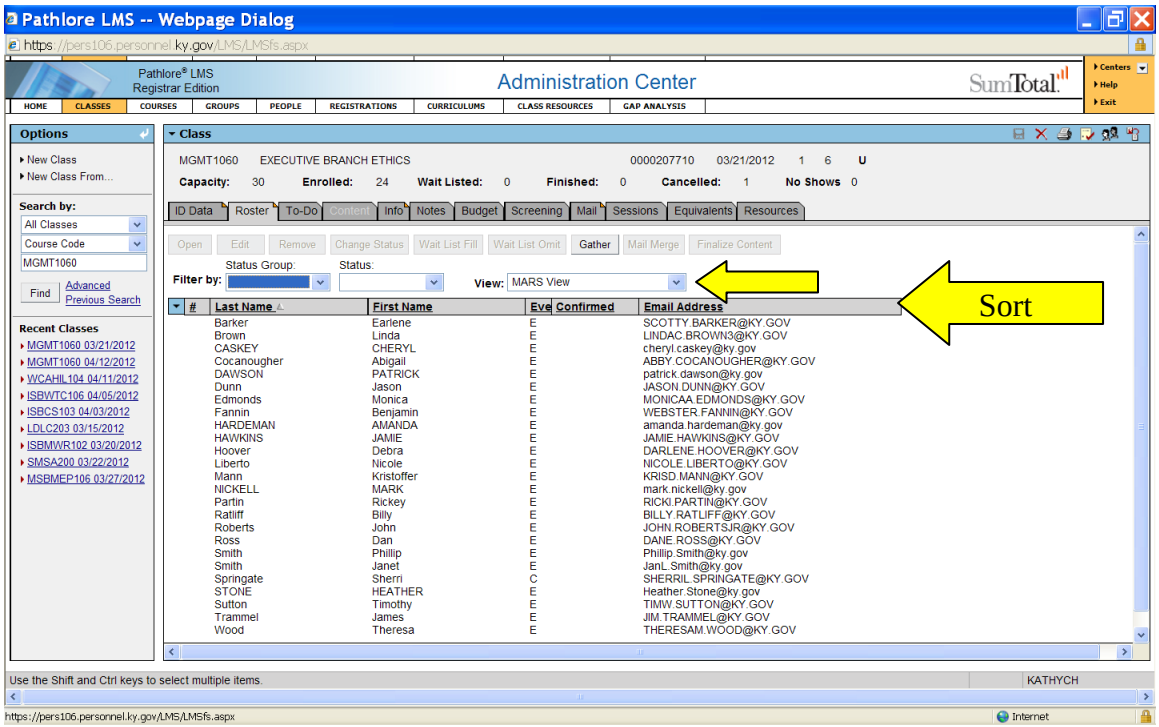
Click on the class dated **03/21/2012** to open the class file.



Class ID Data Tab

This is where you will find all the information related directly to the class. (date, location, instructor name etc.)

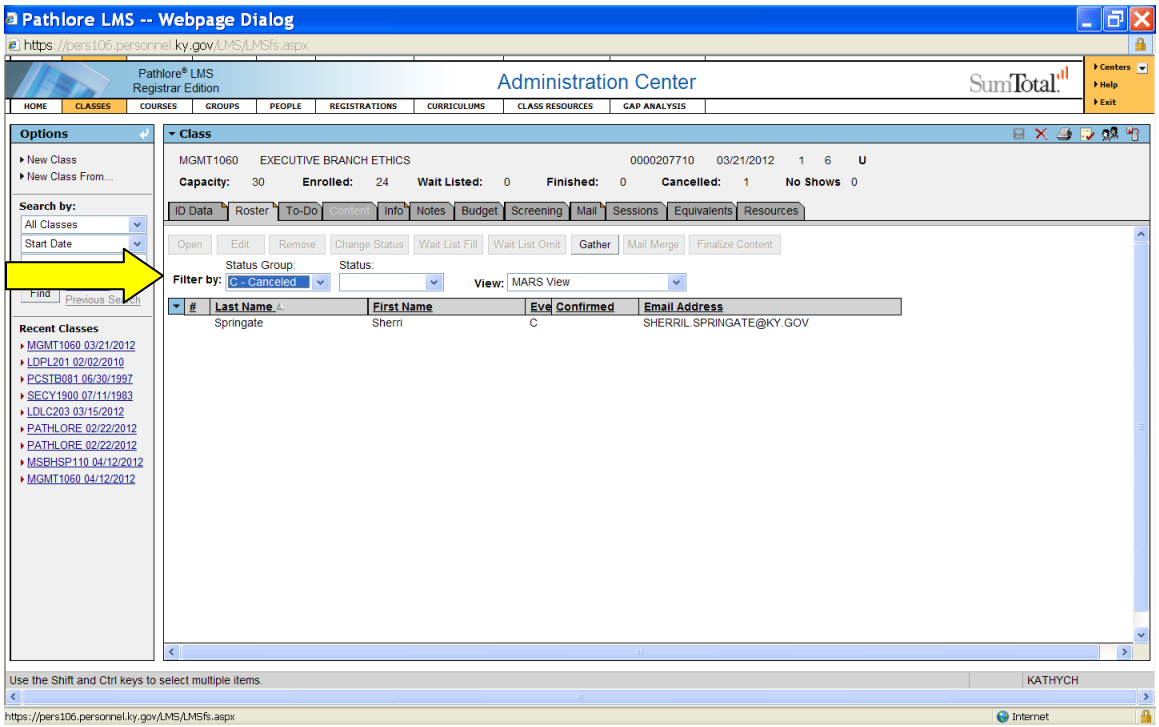
TIP: Notice Recent Class list on the left. **Click** on any link to access classes.



Class Roster Tab

Click on the Class Roster Tab.
This is where you will find a list of everyone who has an event status with the class. (Enrolled, Wait Listed, Cancelled, No Show, Incomplete or Finished). The Class Roster **can be sorted** by header names in bold.

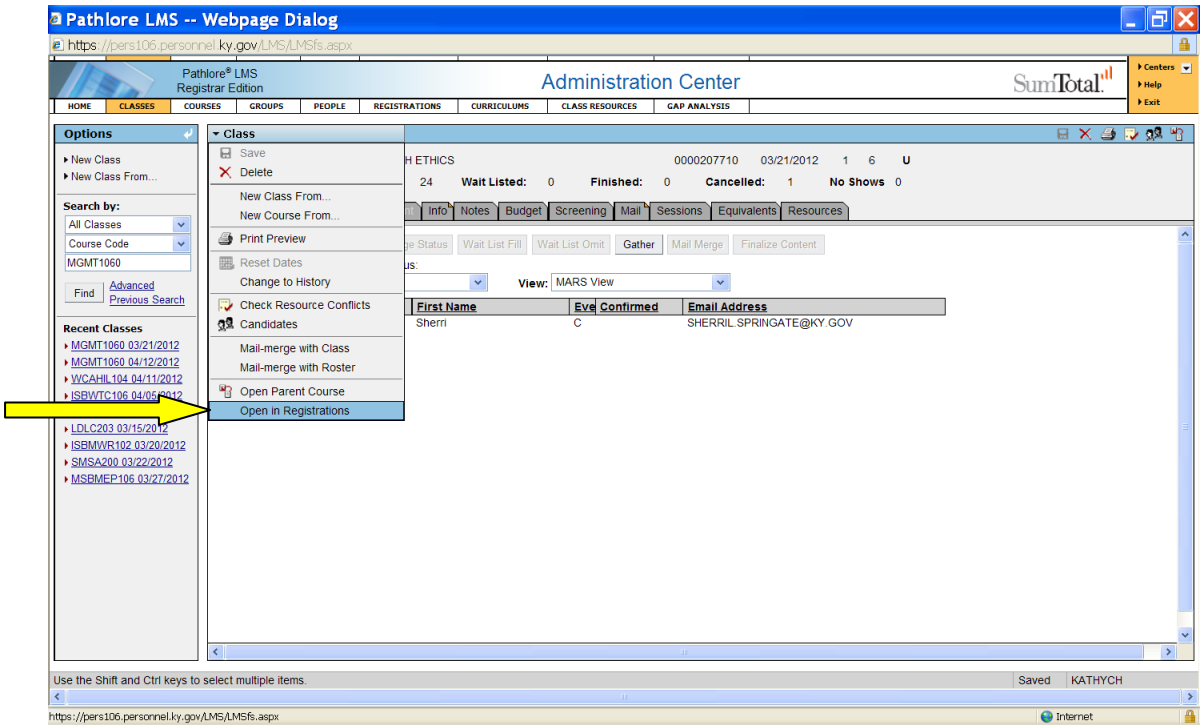
Click on the **View Dropdown** and change your View to **MARS View**.
This view will allow you to see the Confirmed field and email field. As soon as you select this drop down, the system will reveal the new view within seconds.



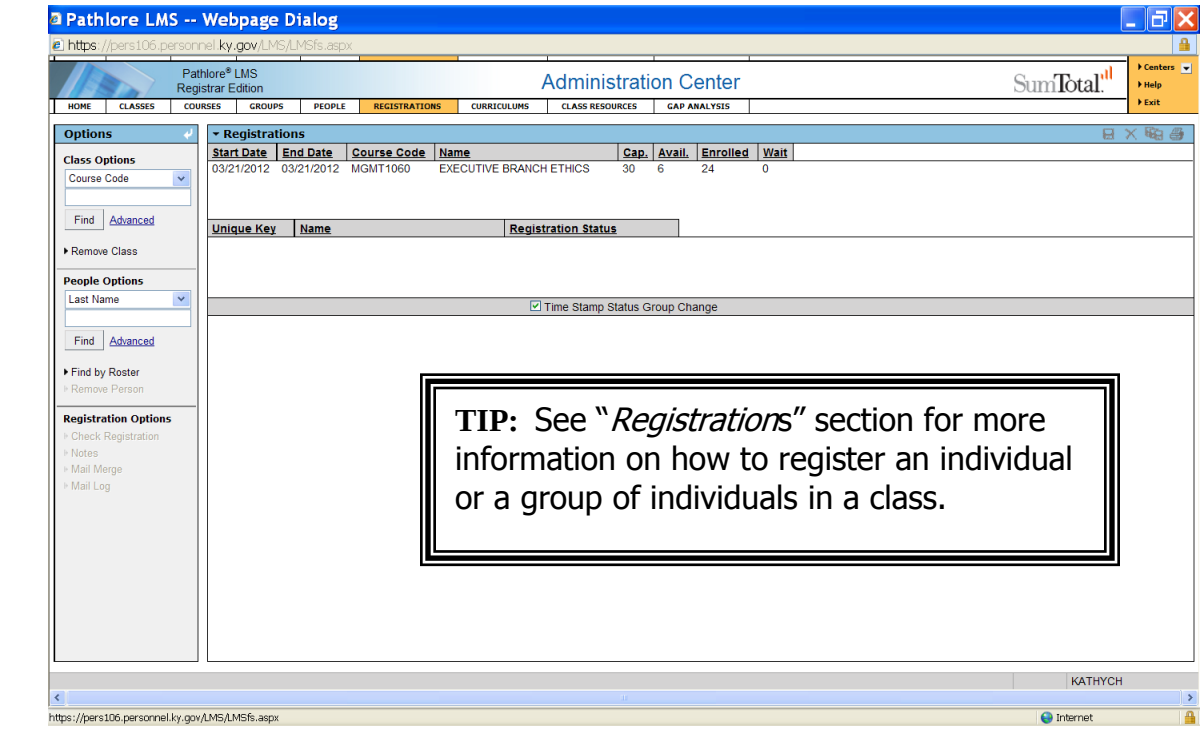
Filtering

Names can also be filtered using the Filter by drop down list.

Select C from the drop down list to view the results of those who have cancelled.



A class can be opened in the *Registrations* screen by using the **class drop down list.**



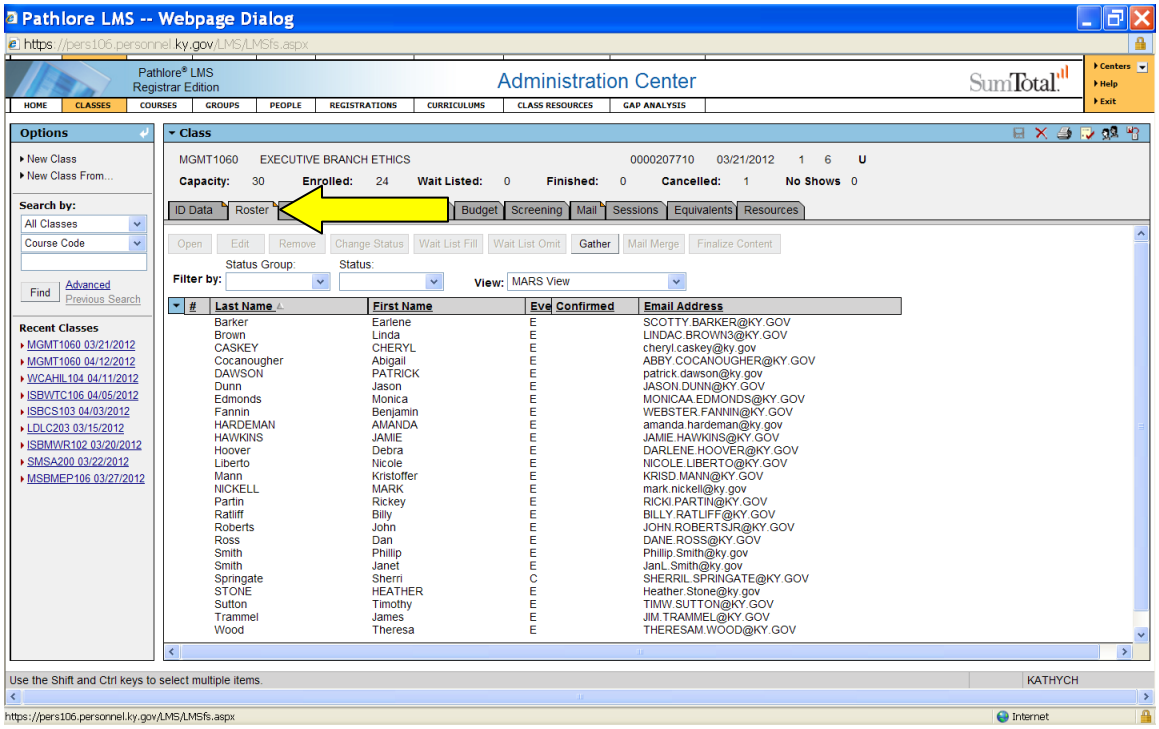
TIP: See "*Registrations*" section for more information on how to register an individual or a group of individuals in a class.

Class opened in Registrations screen.

To Change The Status of An Individual In A Class

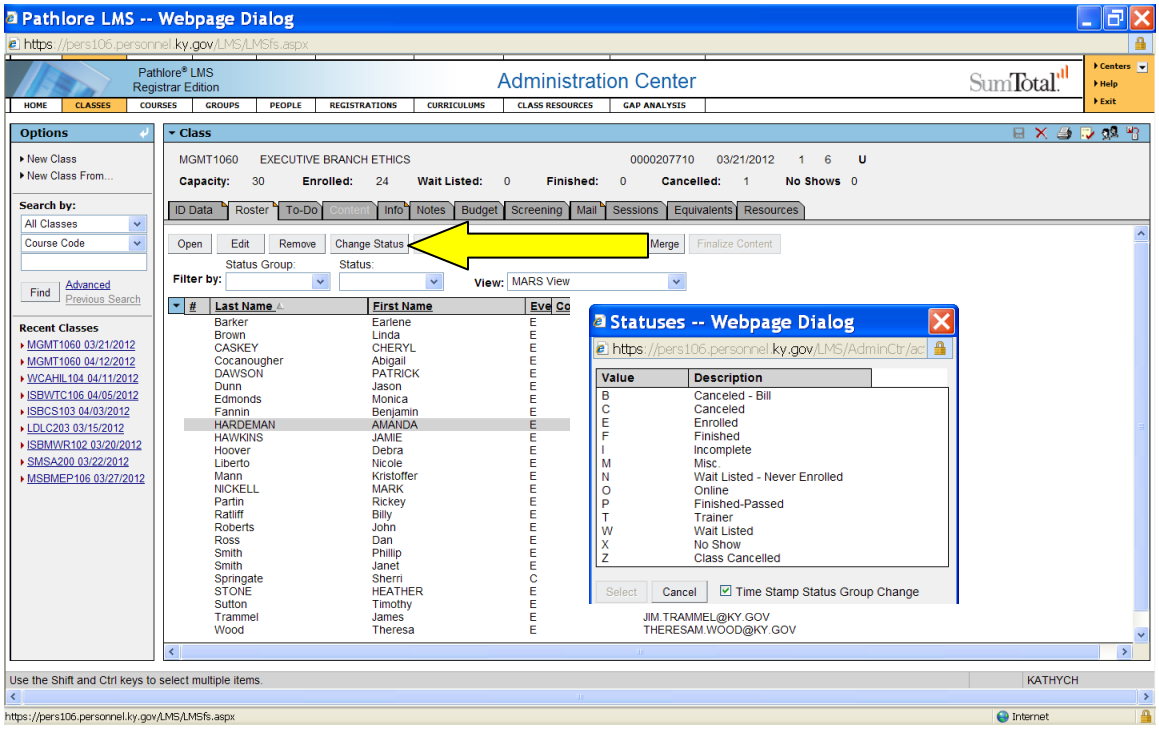
Locate the appropriate class using the class search information previously provided.

Click on the **Roster tab** of the class.



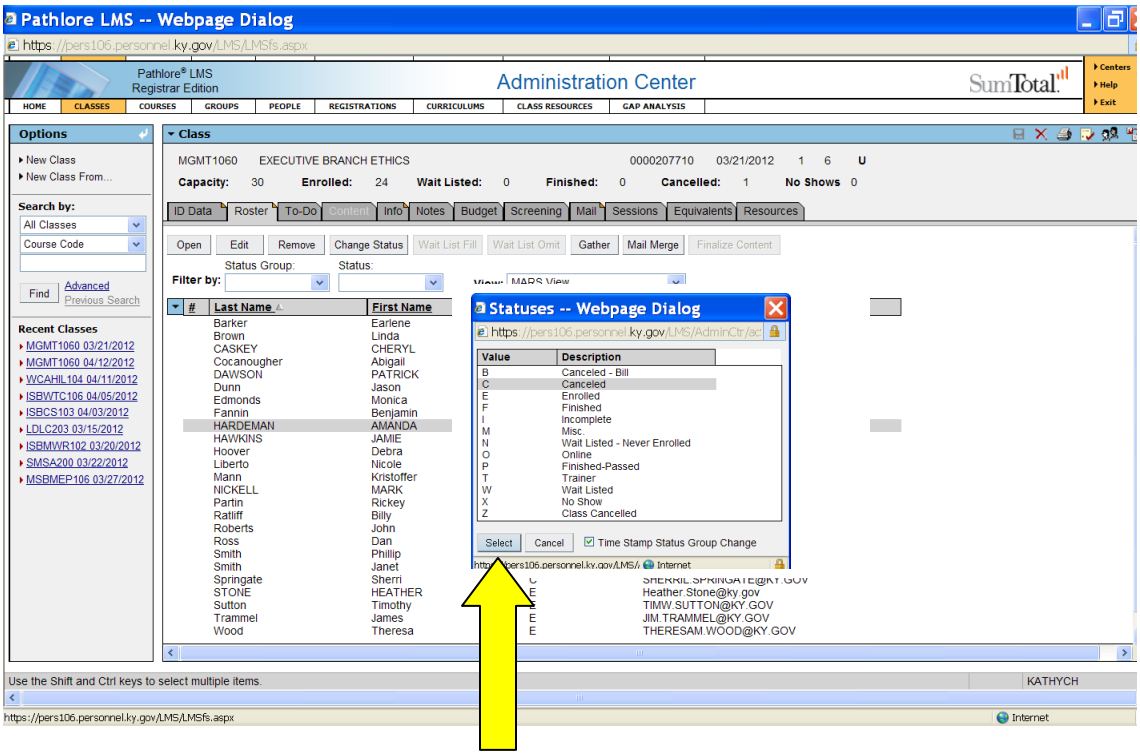
Highlight the person or people whose status you would like to change.

Once you have the name(s) highlighted, **click Change Status**.



TIP: If you are going to change the status of all the people listed, you can highlight the first name in the list, hold down the Shift button and click the last name in the list and this will automatically highlight everyone in between. To pick and choose which names to highlight, you can use the Ctrl (Control) button. Holding the Ctrl button down, use your mouse to click on the names you want to highlight.

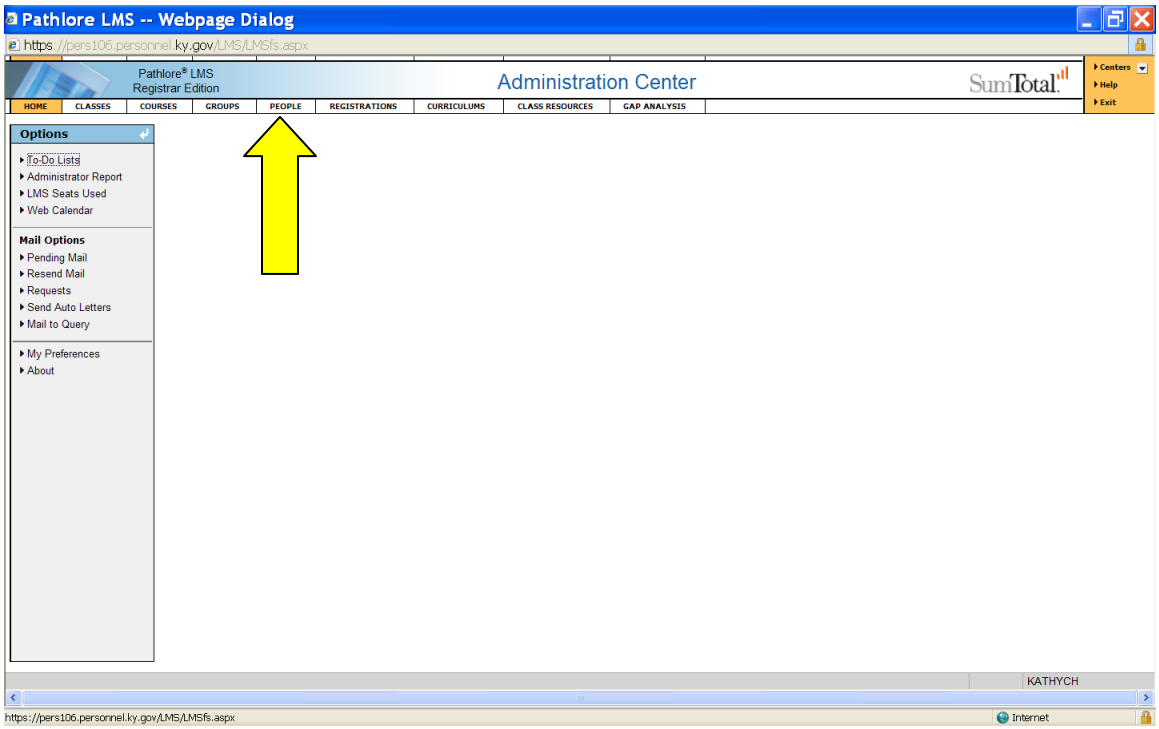
Highlight the **status** you want to change the participant(s) to and **hit select**



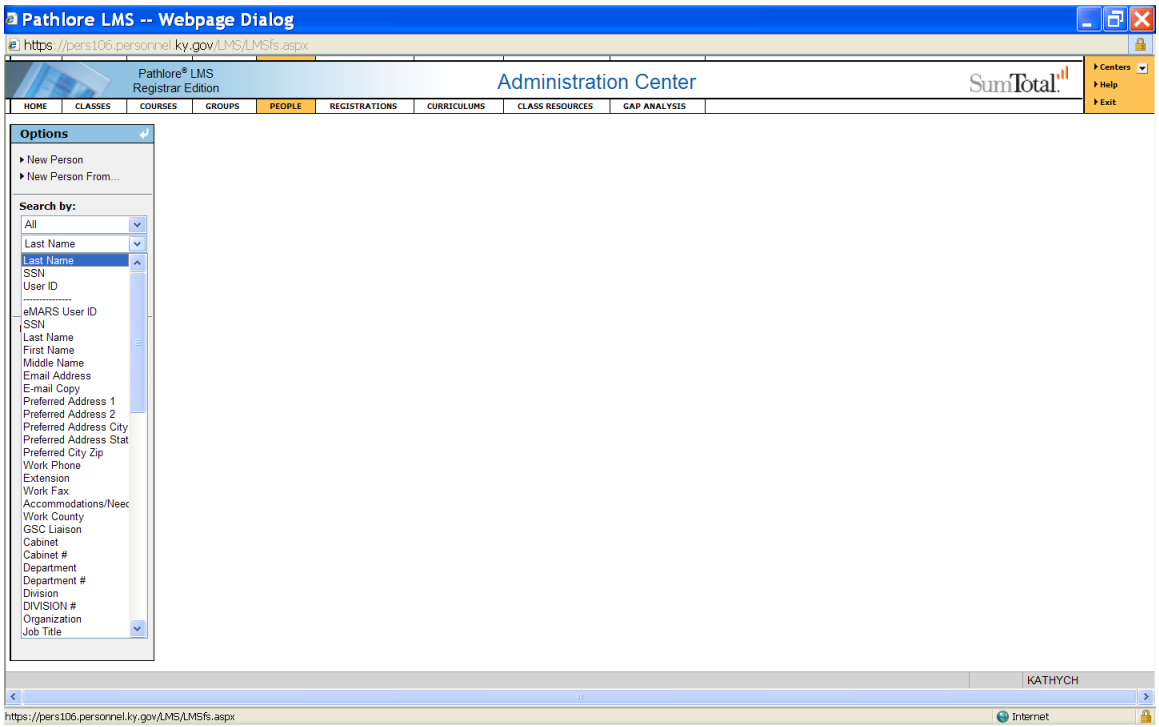
This will automatically change the status of the selected participant(s) and save the record.

People Information

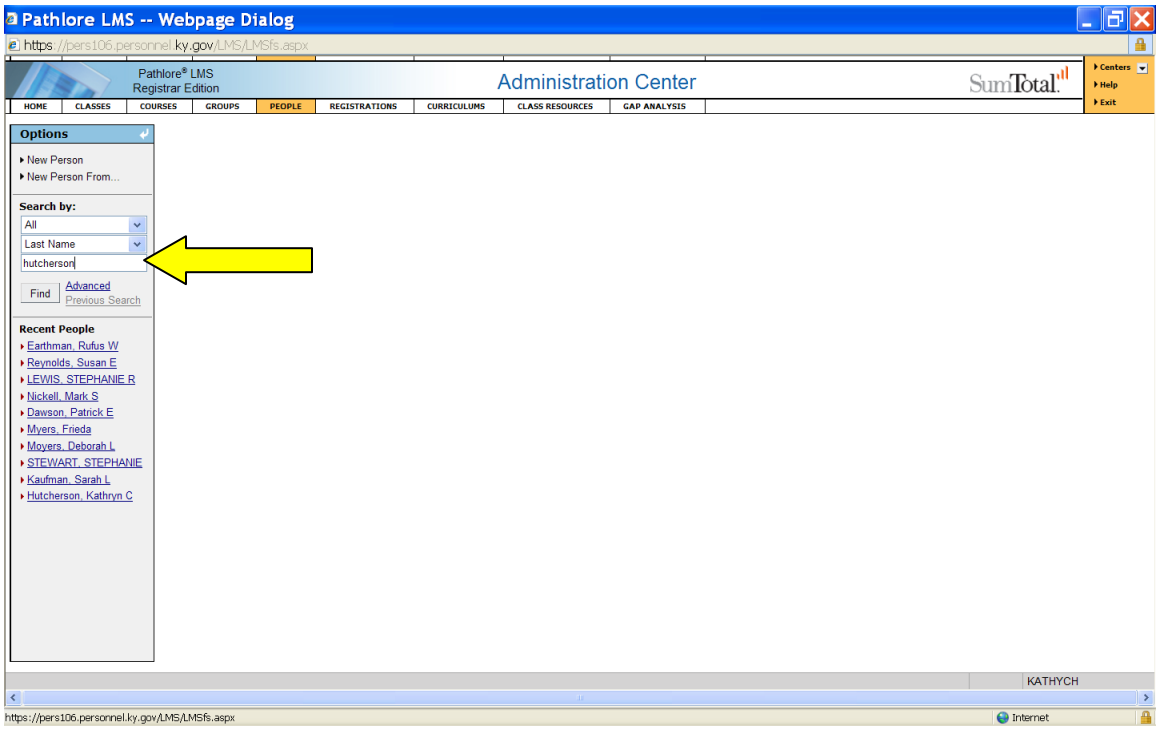
To Access Person Records



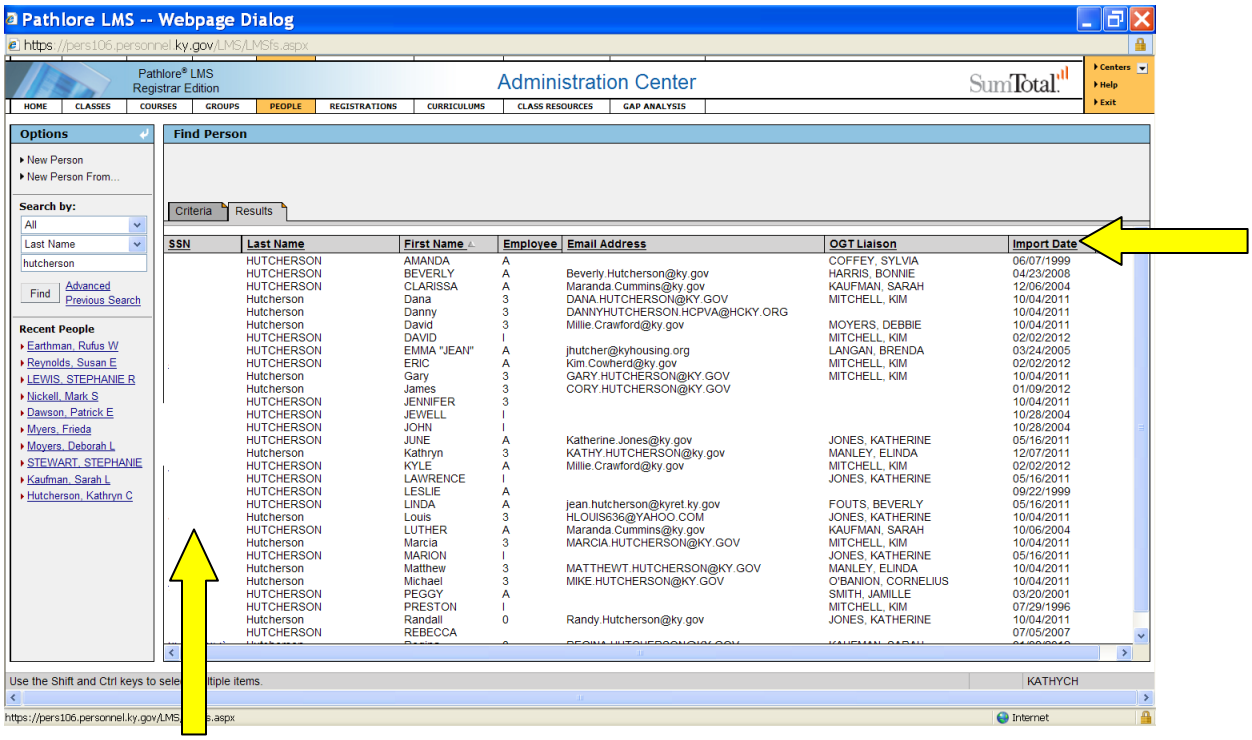
Click on the People link.



You can search for Person information by using the Search by drop down list. Searches can be performed by last name, SSN, email or many other options.



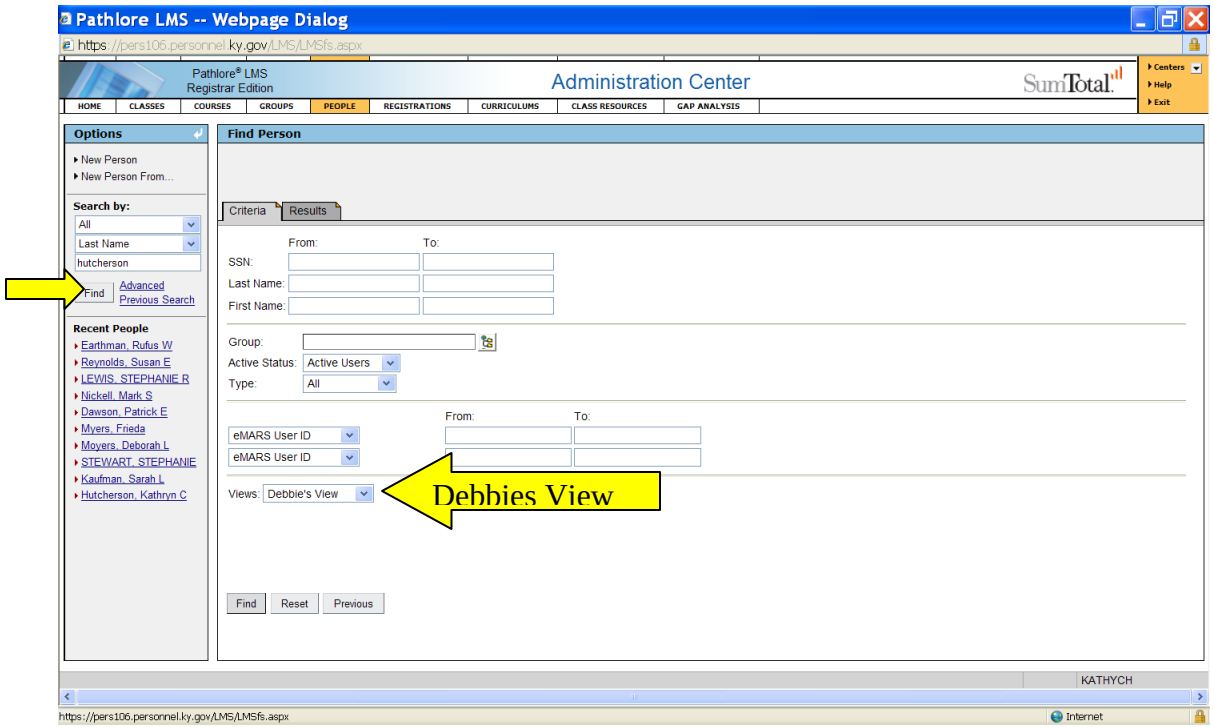
Key in Last Name of a person and **click Find**. You can always locate a person by their SSN. Just change the drop down menu from Last Name to SSN and type in the person's SSN. **<u>Do not use dashes when keying in the SSN.</u>**



Choose person by clicking on SSN link to left (socials have been obscured for security). You will only see the SSN of the individuals for whom you have access. All other individuals will be grayed out and you will not be able to select them.

You can sort this list by clicking on the SSN, Last Name, First Name, Middle Name or any other column header.

> **TIP:** If you need to access one of your employee records that is grayed out, please contact Kathy Hutcherson at 564-8170 or via email.

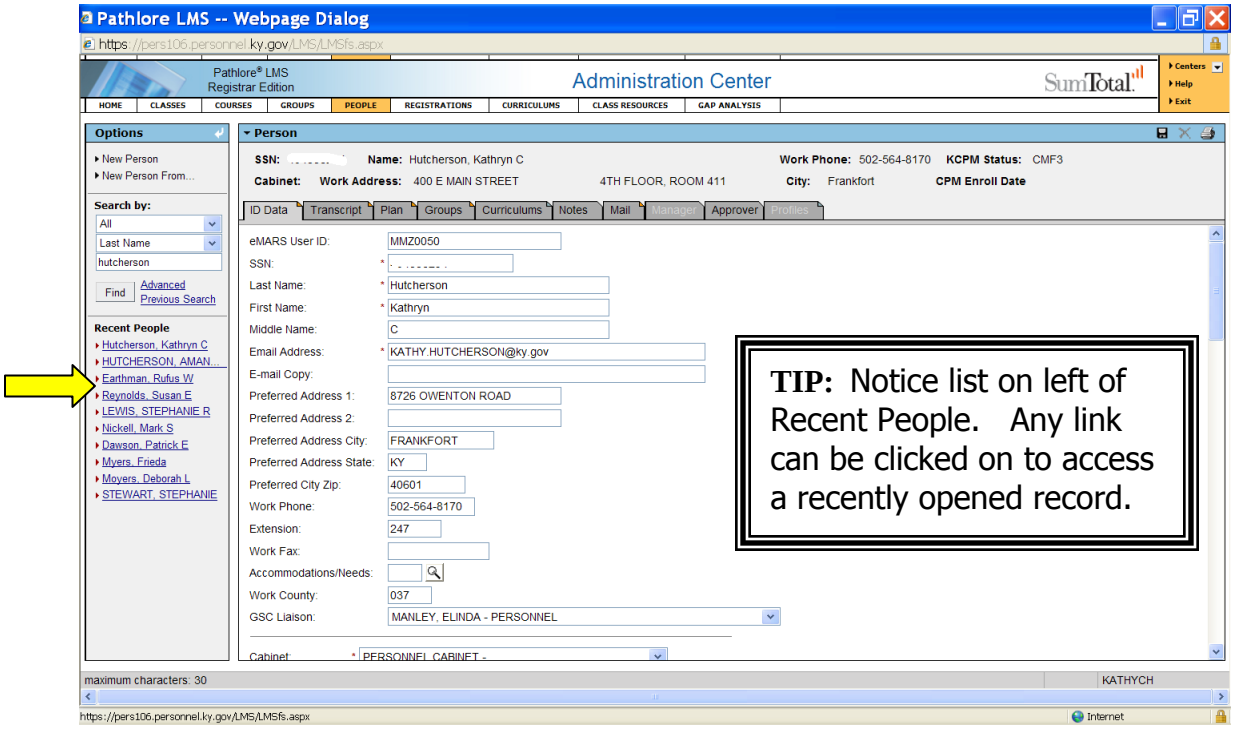


Click on the Criteria Tab and change your View to Debbie's View. This view will allow you to see a lot more information about the individual you are searching for.

Click on Find to view the new results.

Click to select the individual person record you would like to view. For Training purposes, select your own name.

Once you click on the link, this is the screen that will appear.



Person ID Data Tab:

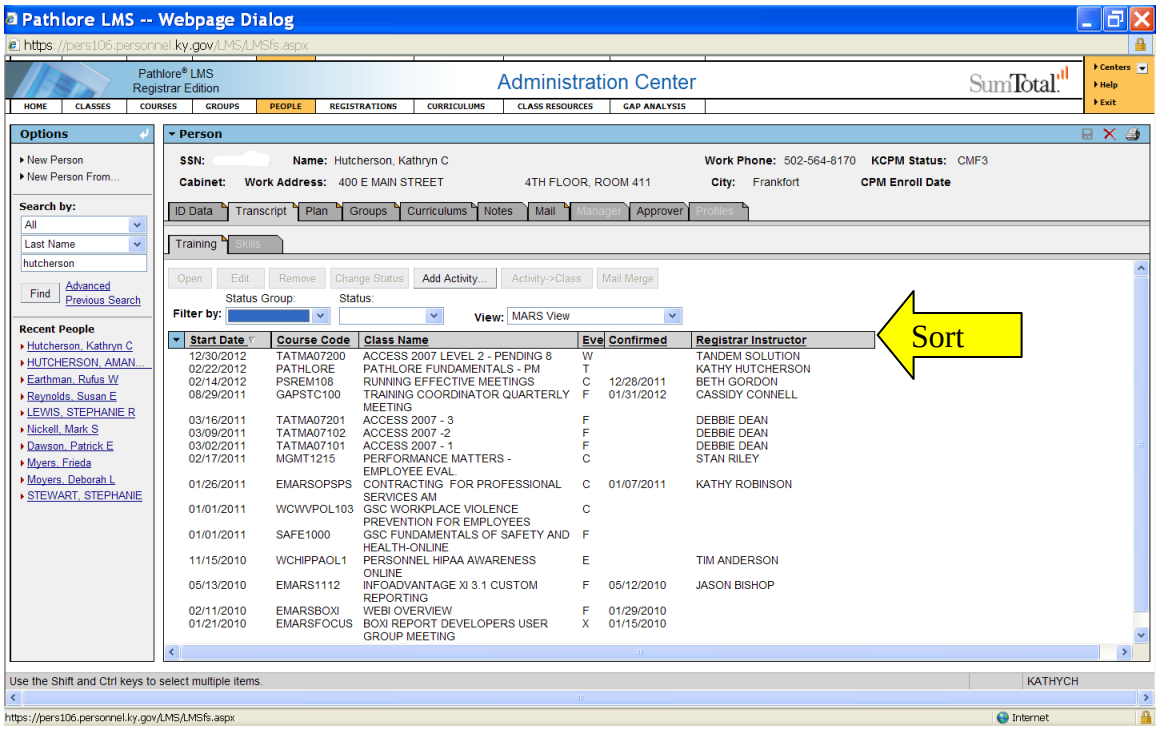
This is where you will find all the information available about the person.

Important: Please verify that the individual's email address is entered correctly. Class participants receive class information via email. If the email address is entered incorrectly they will not receive the class information. If the email address is incorrect, please go in and correct it, then hit the save button (small diskette symbol on the top right side of the blue toolbar).

Other important information:

GSC Liaison
Cabinet/Department Names & Numbers

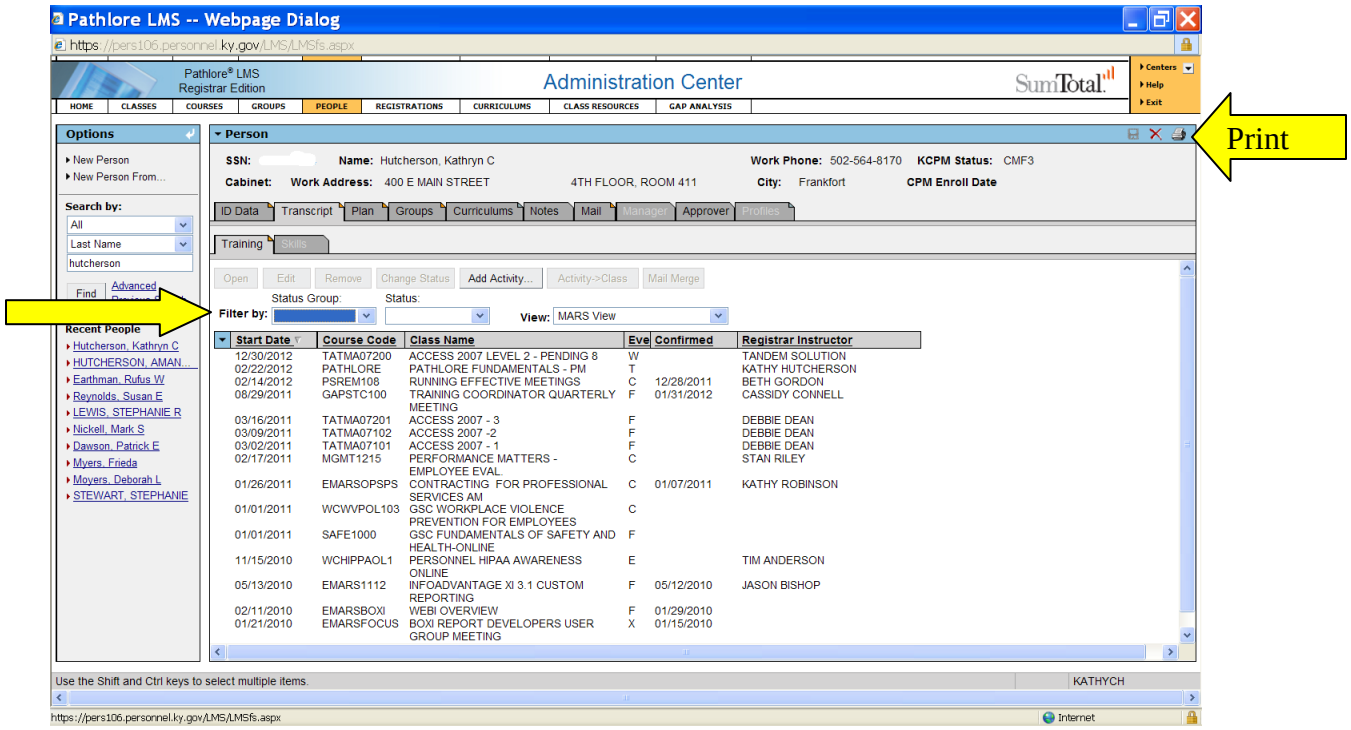
TIP: Employee names in the system are "given names". This would be the name that was placed on their state application when they were hired. So if you are looking for someone who's first name you know as Kathy you might find her listed as Kathryn.



Person Transcript Tab

Click on the Transcript tab to see a list of all the classes tied to the person record. Notice the event statuses.

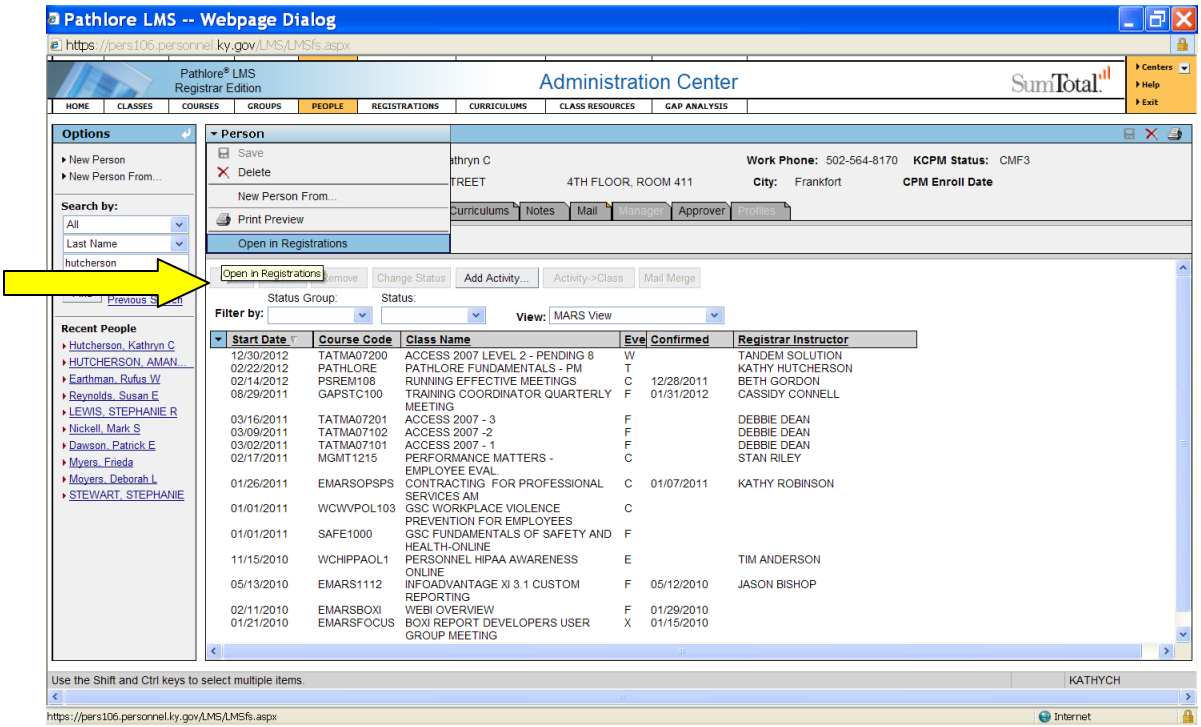
This list can be sorted by any column header.



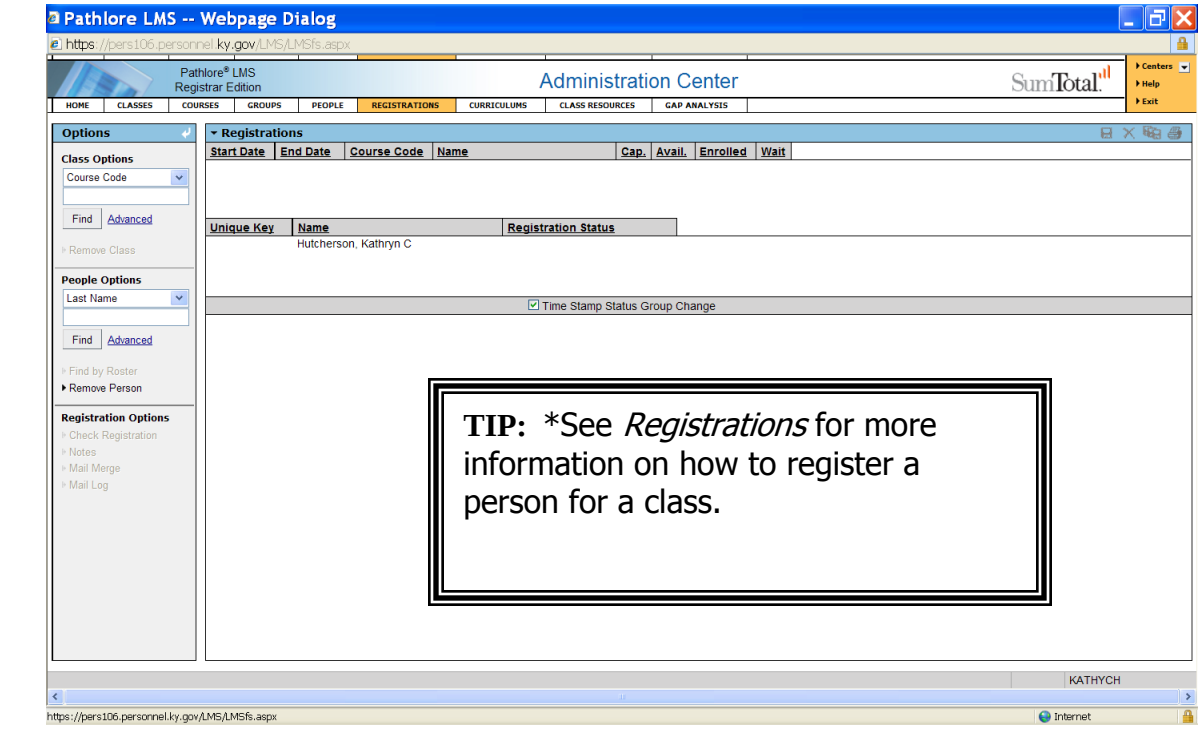
The transcript can be filtered by using the Filter by drop down lists.

Enter a **C** in the Filter by box to view the results of any Cancellations.

> **TIP:** To print a person's transcript, click the printer in the top right hand corner of the screen.

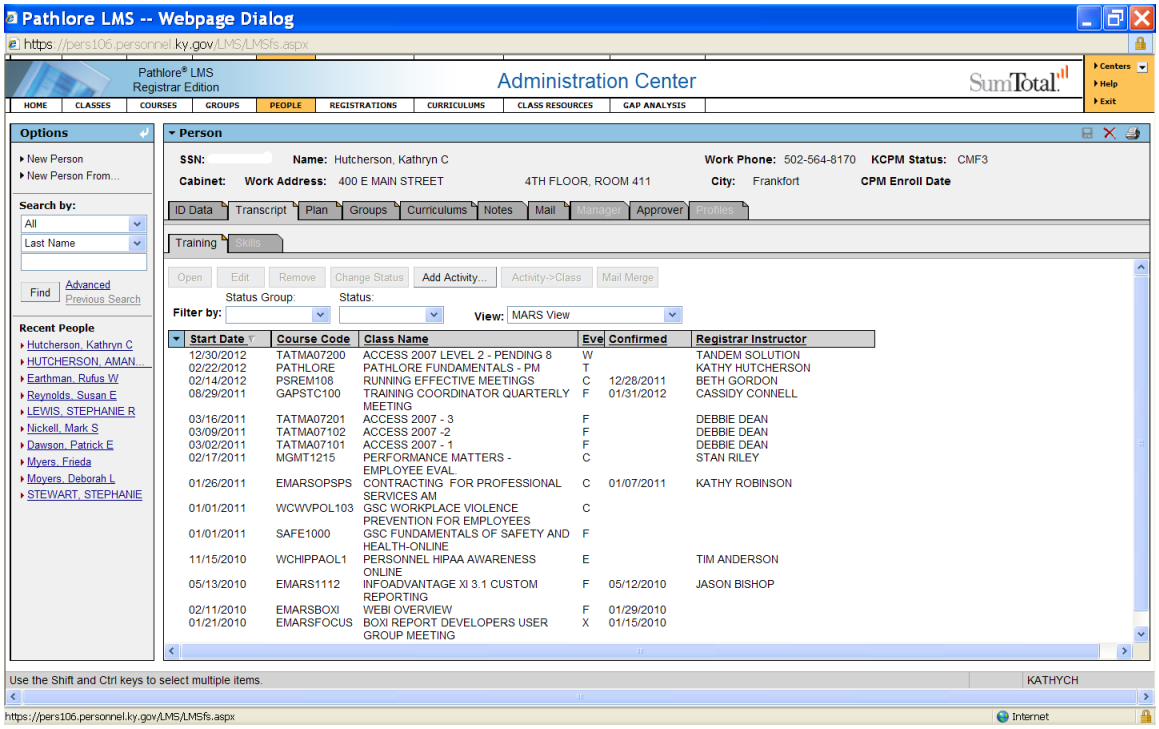


A person record can be opened in Registrations by choosing the Person drop down menu.



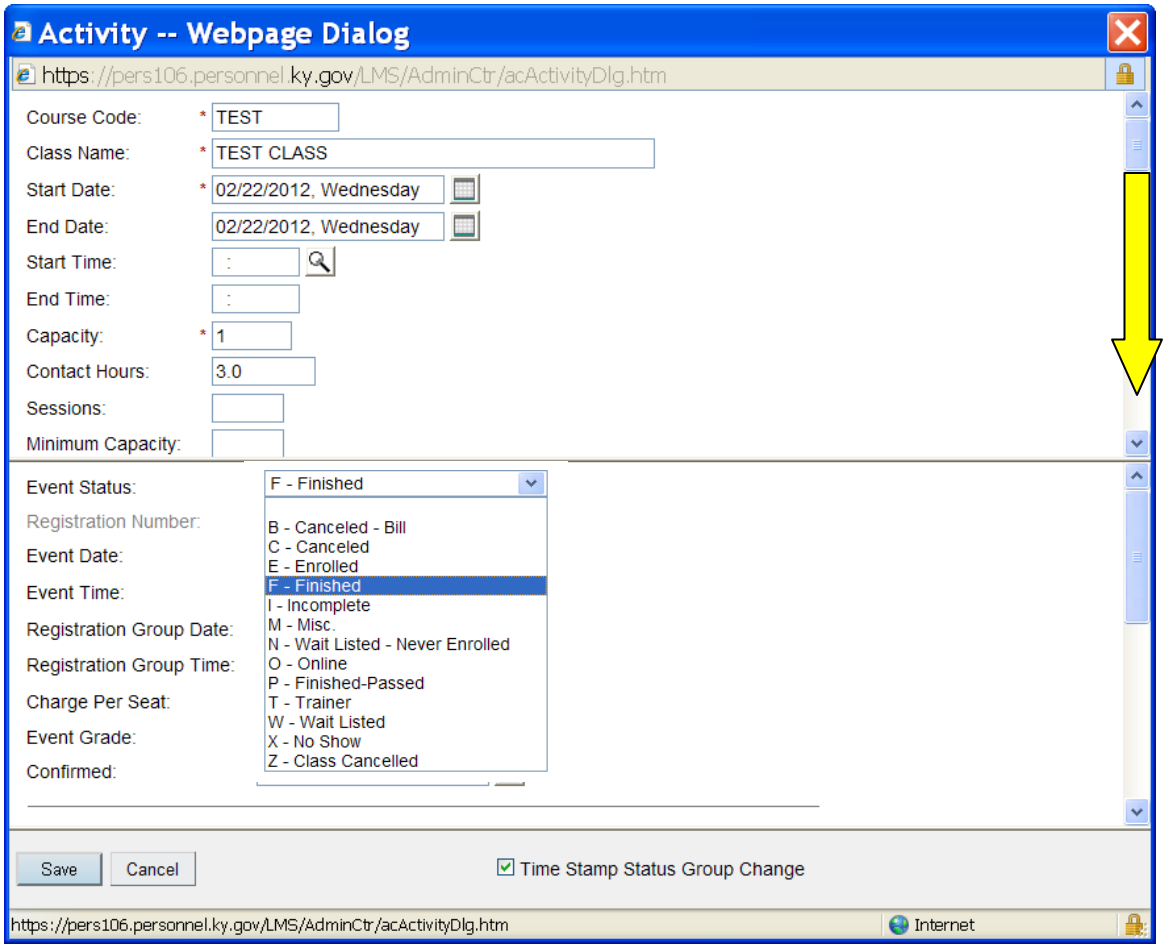
Person record open in Registration screen

To Add Activity To Person's Transcript

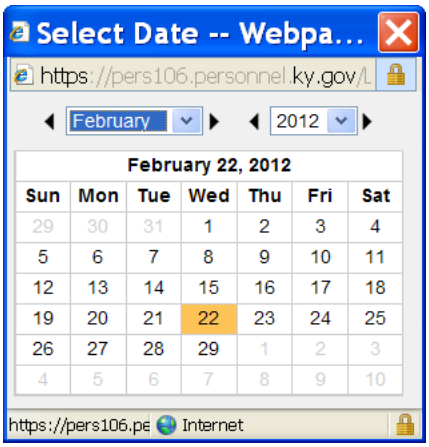


Choose desired person record.
Click on the transcript tab.
Click on the Add Activity button.

A screen that will pop-up when over the person's transcript when you go to Add Activity.



Key in information for the required fields (*)



The only required fields are:

- Course Code
- Class Name
- Start Date
- Capacity
- Contact Hours
- CEU's (if applicable)
- Event Status

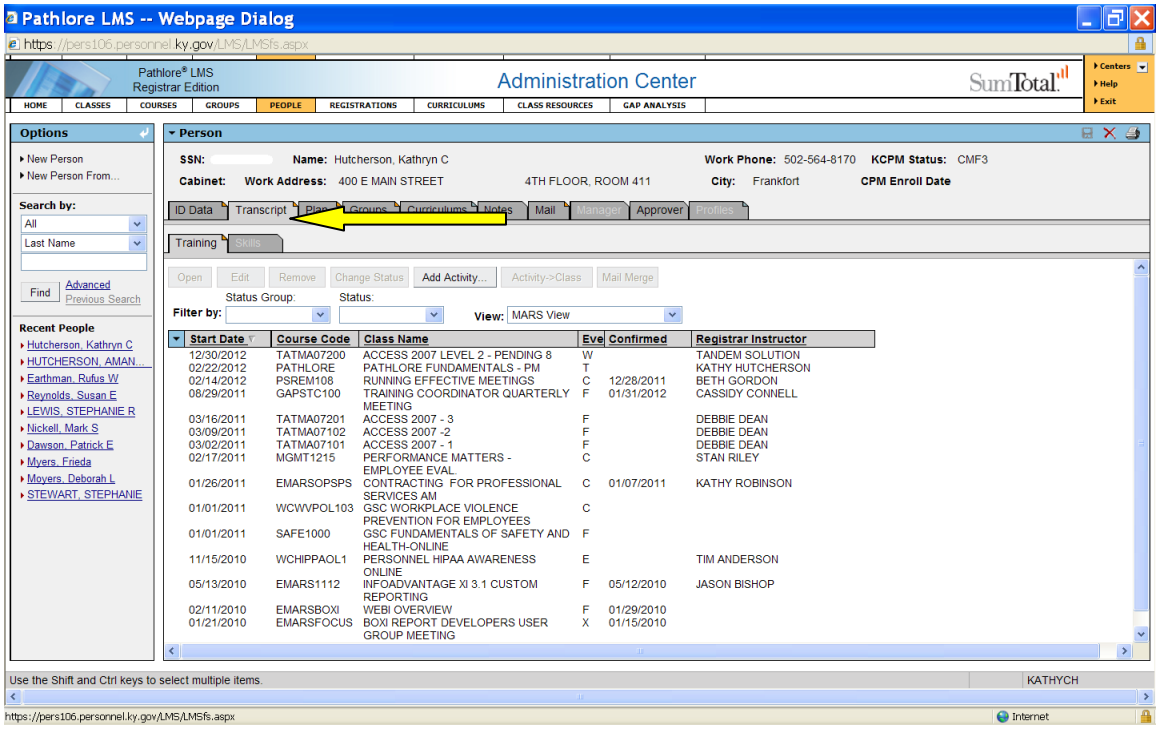
Using the Start Date and End Date calendars **choose** the start and end dates for Activity.

Notice the screen is split into two (2) sections. Key in start time, sessions etc and scroll down the first section enter the contact hours and CEU credits as applicable.

Hit Save

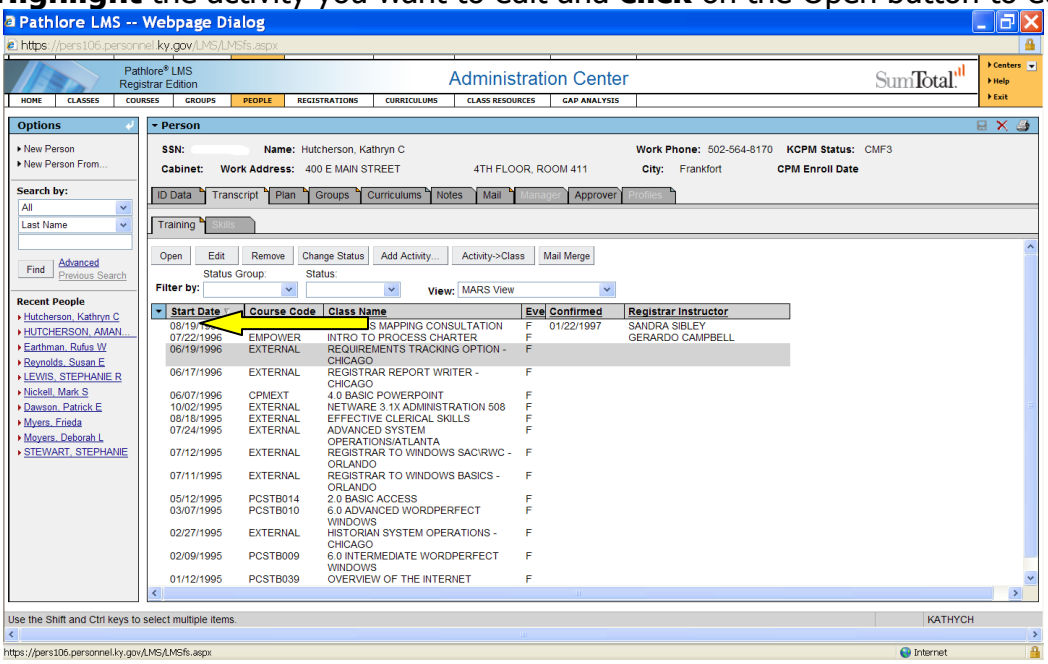
To Edit An Activity On A Person's Transcript

Locate the person's record using the People search discussed earlier.

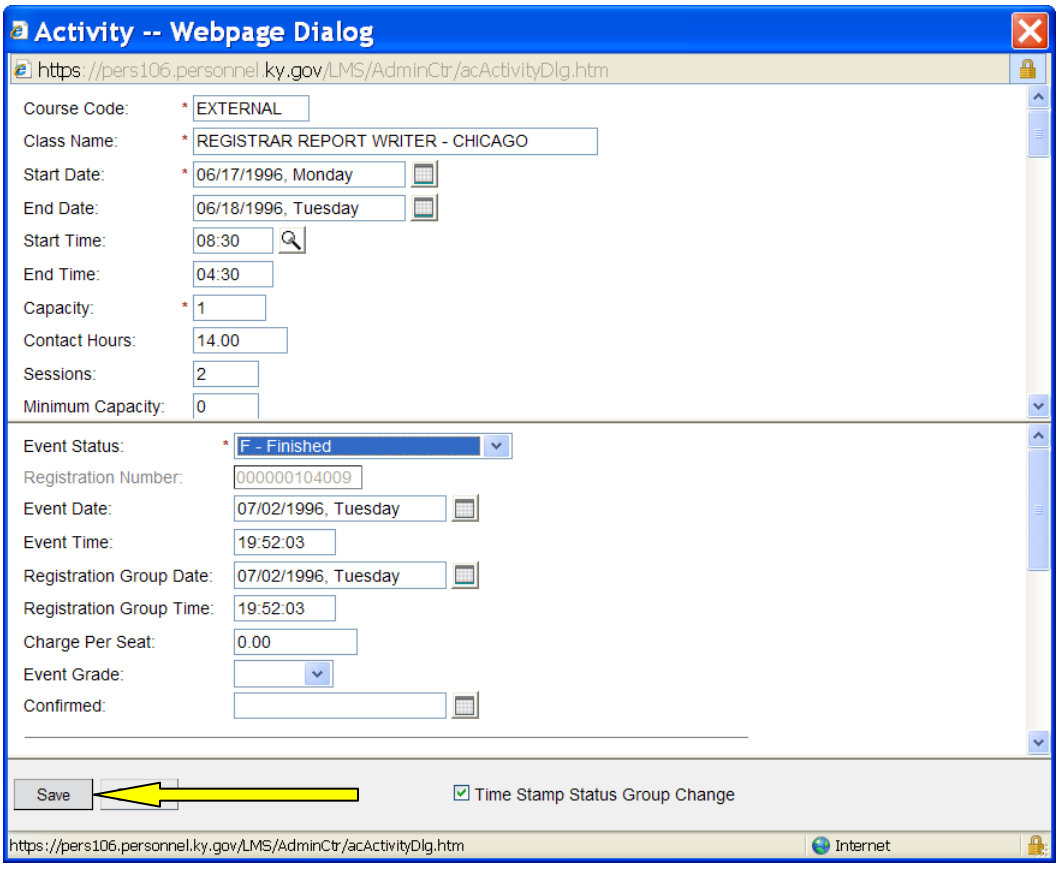


Click on the Transcript tab to access the person's transcript.

Highlight the activity you want to edit and **click** on the Open button to edit.



The following pop-up screen will appear:

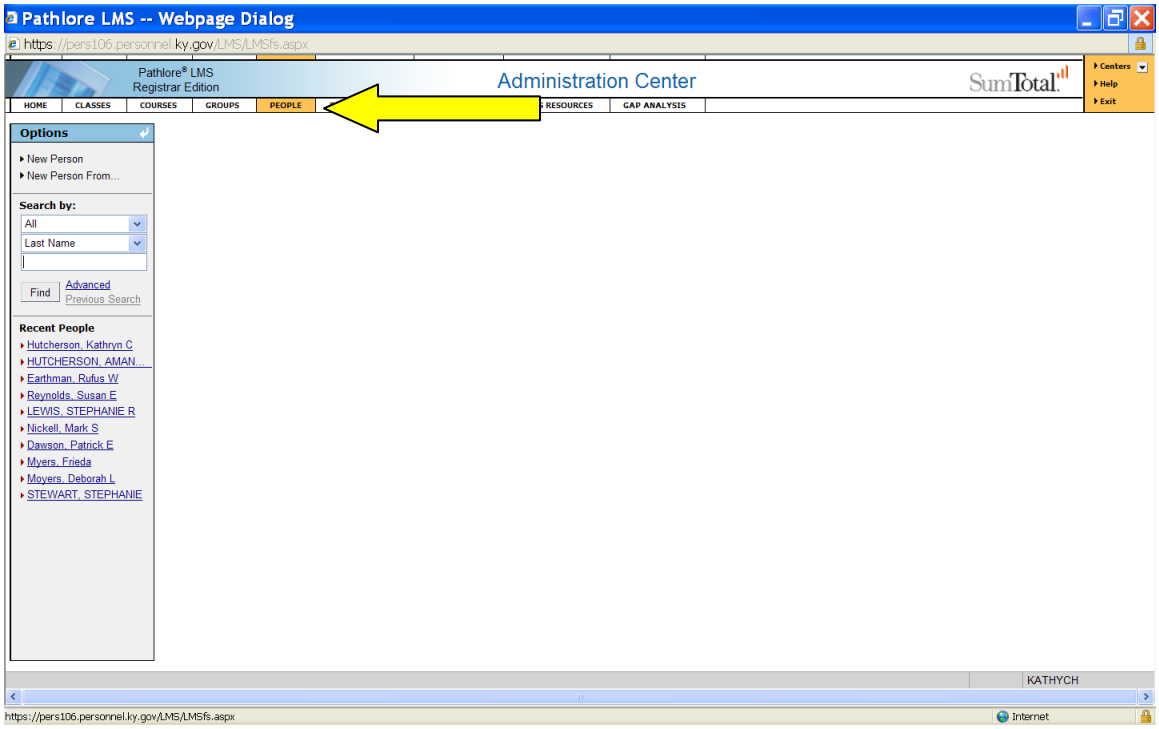


Make all of the necessary changes and click the **Save** button.

To Create A Record For A Contract Employee

Some state agencies use contract employees and need to track those employees training information. Since contract employees are not actually state employees, their information is not in Pathlore by default. You will have to create a record for those particular employees.

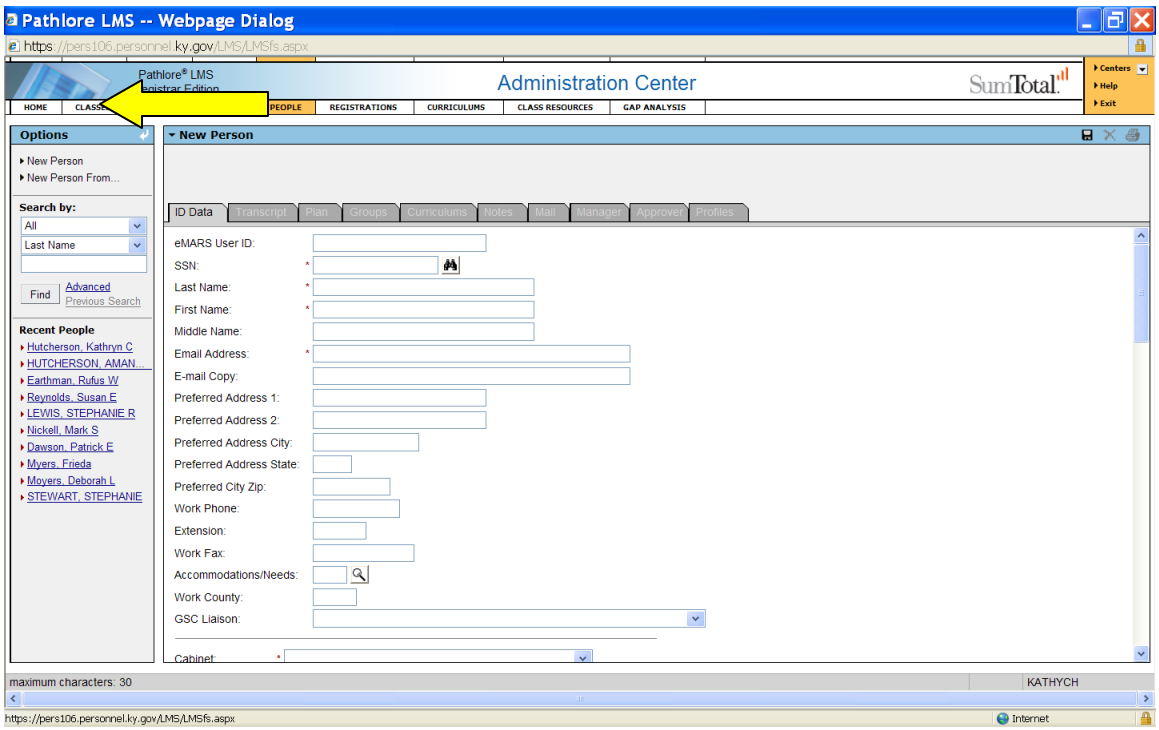
Note: Do NOT add state employees. GSC will add / update state employee records monthly.



Click on People on the top toolbar.

Click on "New Person" on the left-hand side.

This screen will provide you with a blank person form to fill in the appropriate information**.**

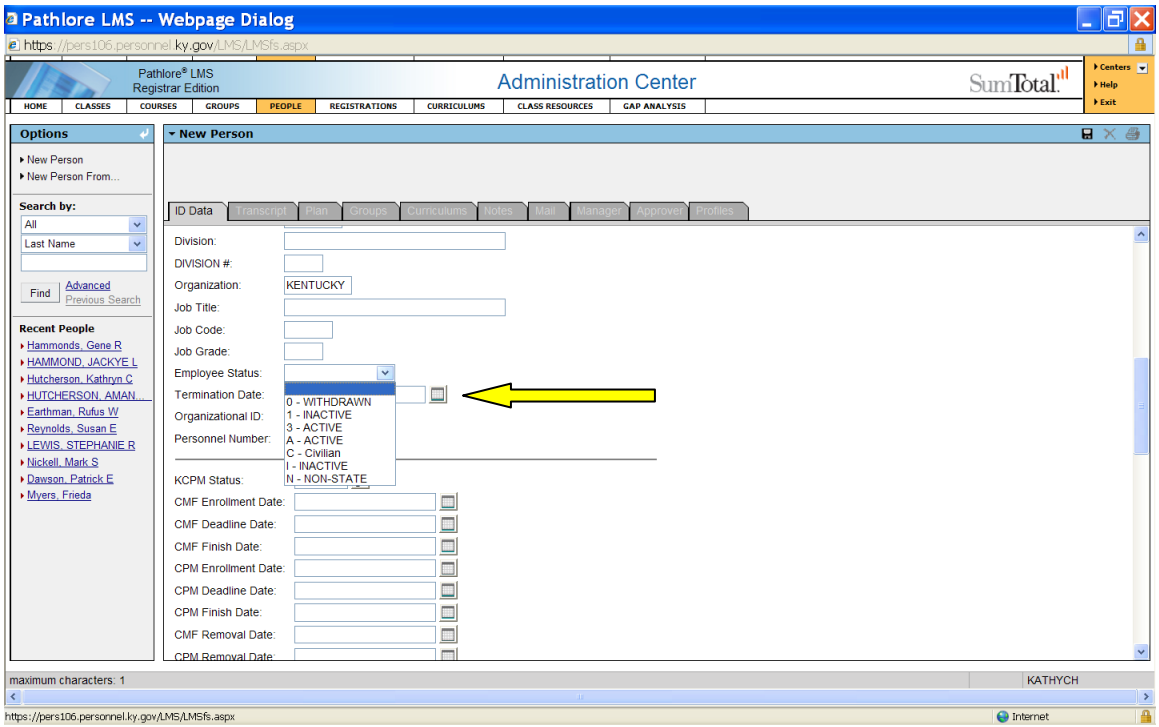


The following are required fields; however you need to fill out all of the information to the best of your ability:

- SSN – Social Security Number
- Last Name
- First Name
- Email Address
- GSC Liaison
- Cabinet
- Cabinet Number
- Race and Sex if known
- eMARS TTL

TIP: Without the SSN, a person record cannot be entered into Pathlore. If you absolutely cannot obtain the SSN of the contract employee, you will need to create a number for this individual. Please follow this method:

First 2 Digits of the Number: Birth Month
Second 2 Digits: Birth Day
Last 4 Digits: Last 4 digits of the SSN

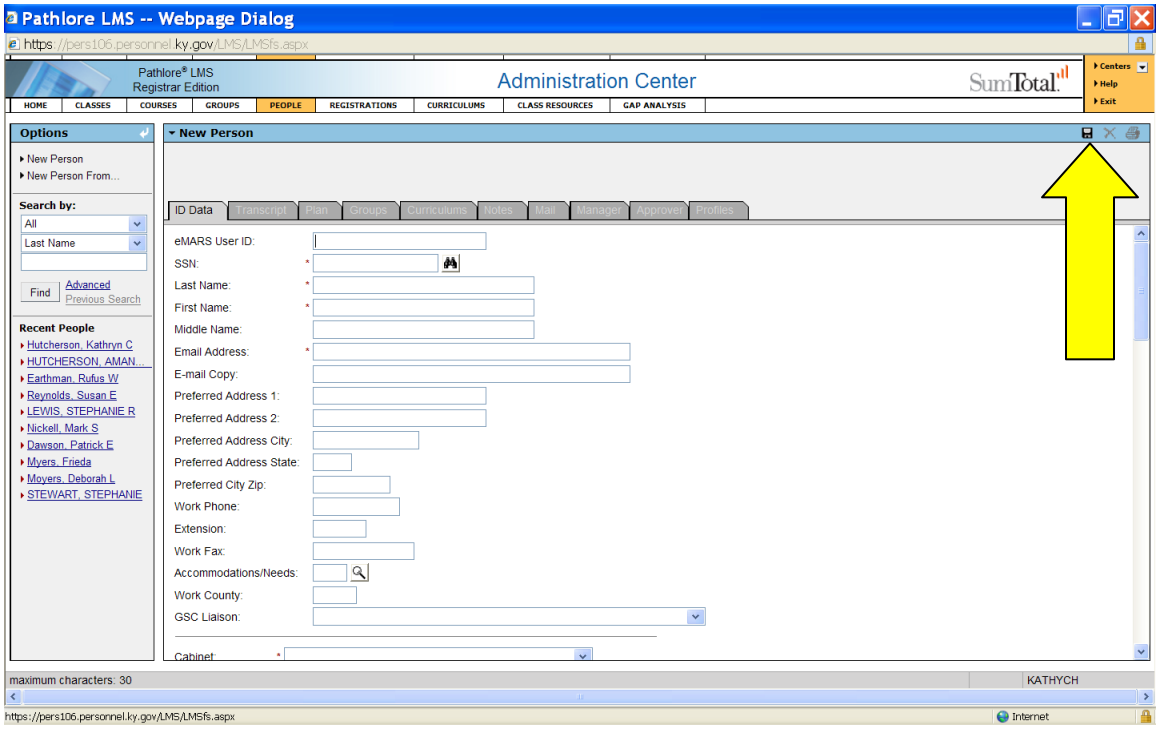


You should also fill out the employee status.

Employee Status should be marked N – Non-State for all contract employees. This is the ONLY status you should ever use. Do NOT change the statuses of any other employees.

You should also fill out work and home address information if you know it. Fill out all information to the best of your ability.

Once all information has been entered, **click** the **Save** ( ) button and the new record has been created. If the person already exists in Pathlore, the system will let you know.

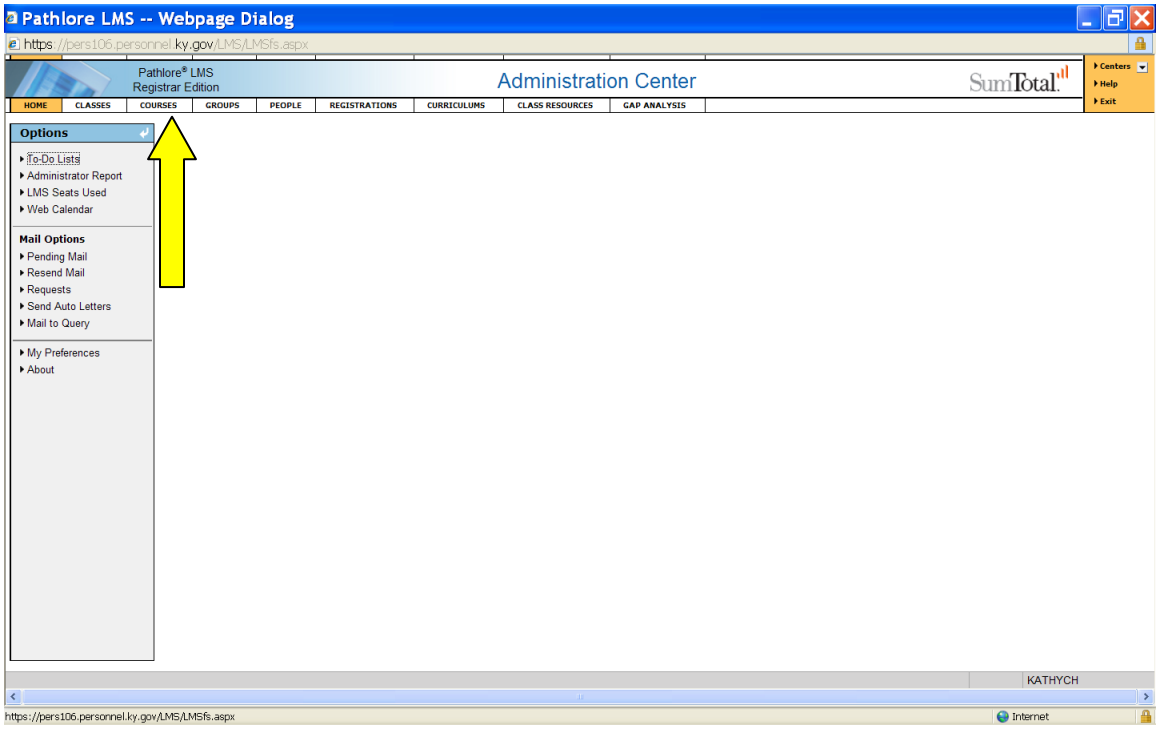


The new record is now available in Pathlore.

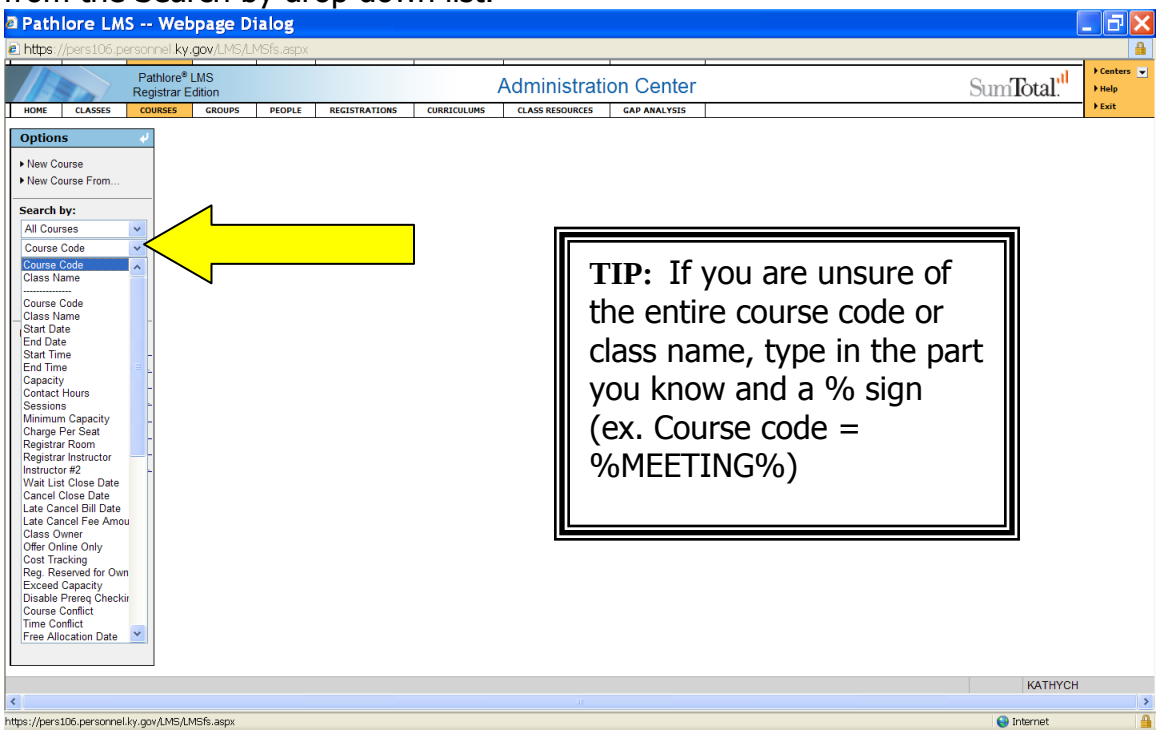
Course Information

Course Search

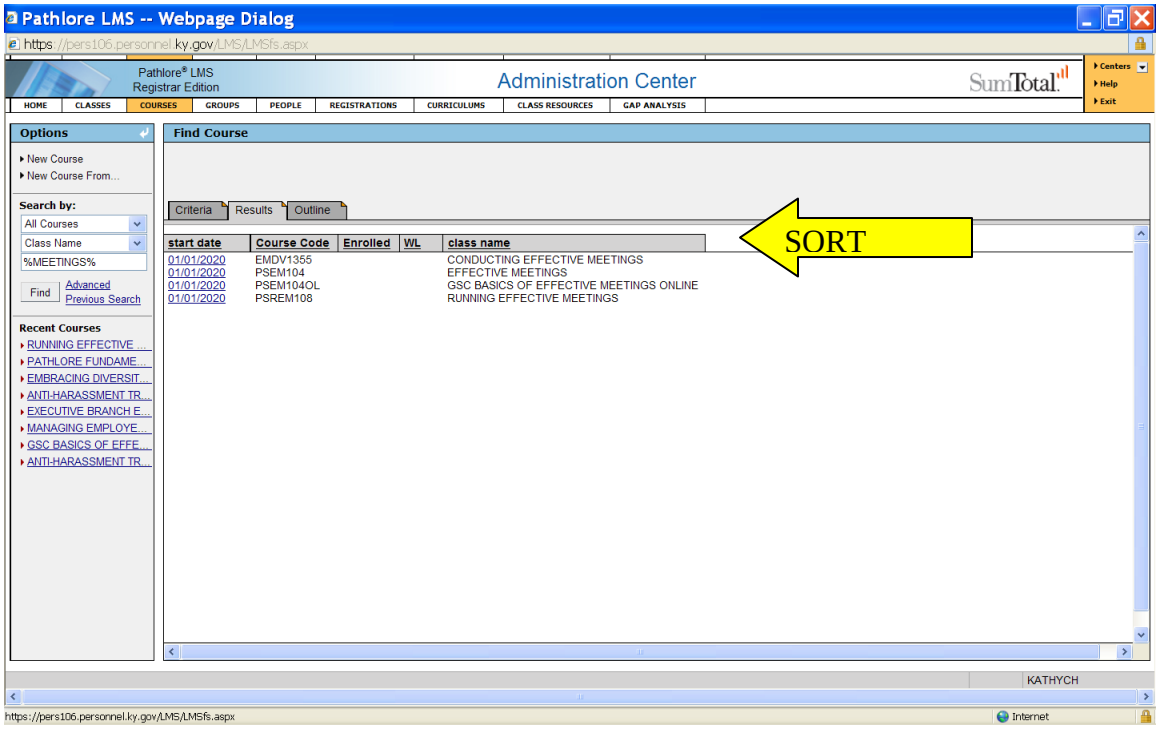
To **search** for a particular course, **click** on the Course button



You can search for a course by Course Code, Class Name or other search options from the Search by drop down list.

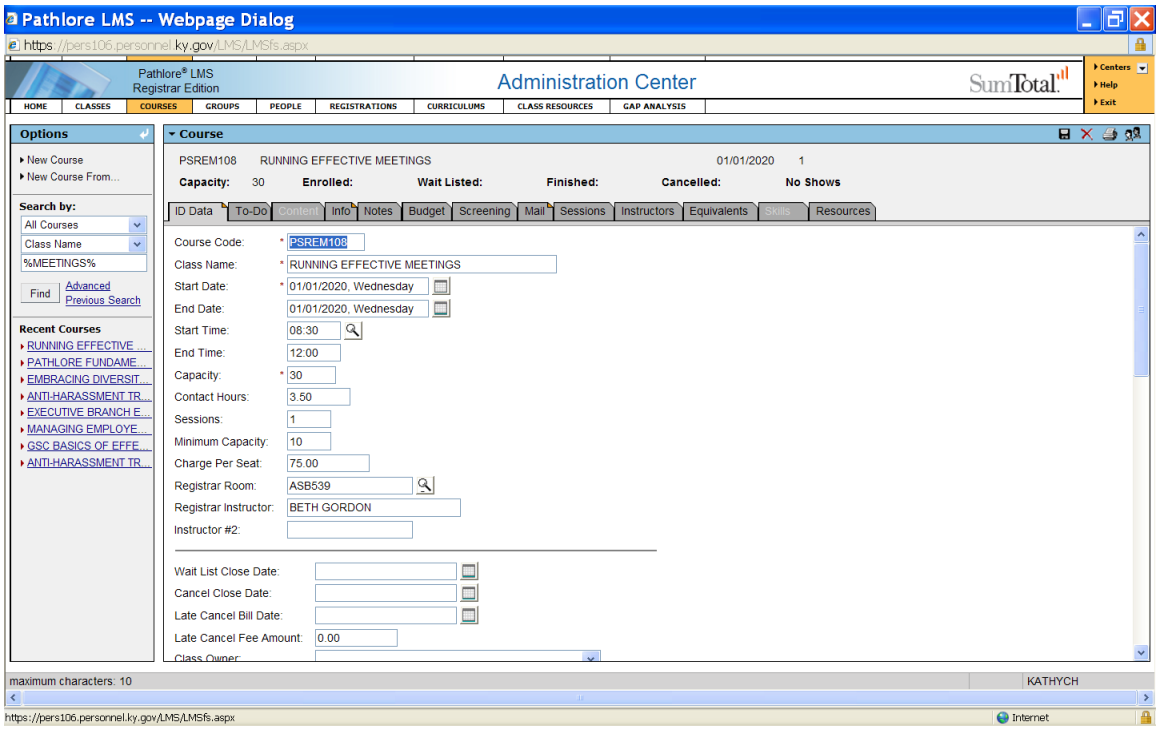


Key in the course code or class name and click on the Find button or hit Enter.



Highlight the Start date of the course you would like to view.

Once you have selected the course you would like to view, the following screen appears with all of the course information located on it.



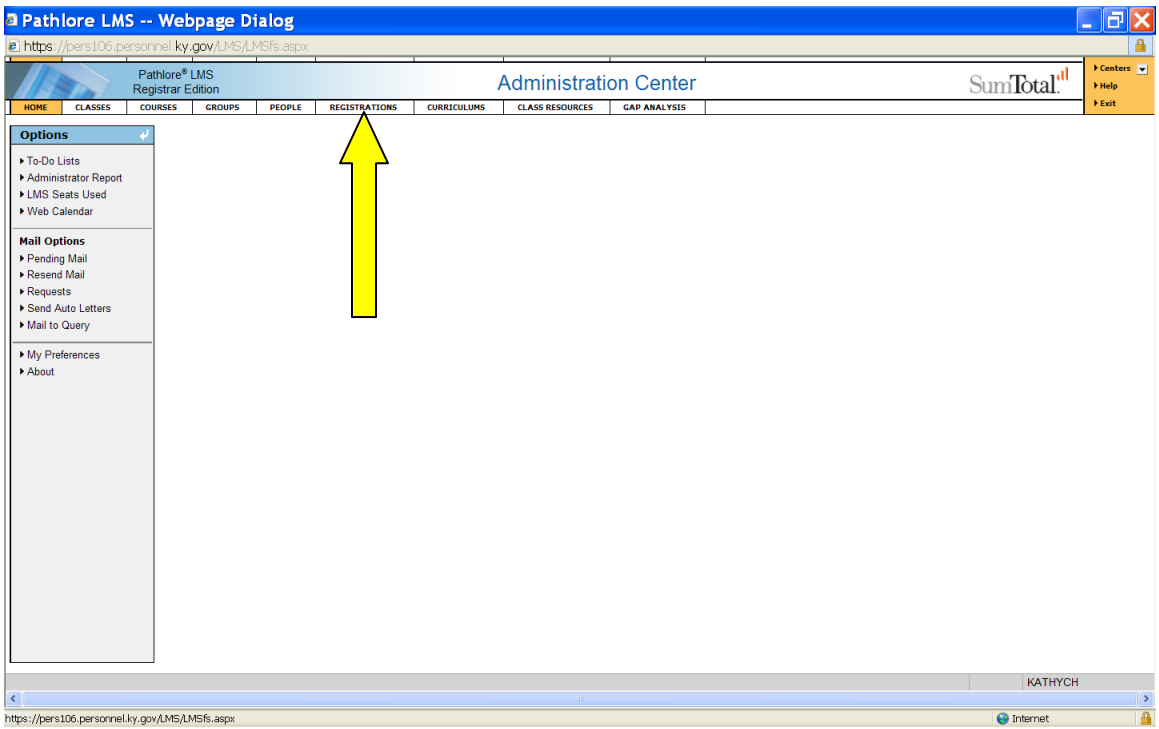
You may or may not have access to modify the course information. If the course was set up by you, you should be able to modify any necessary information and **click** the **Save** ( ) button to save your changes.

REGISTRATIONS

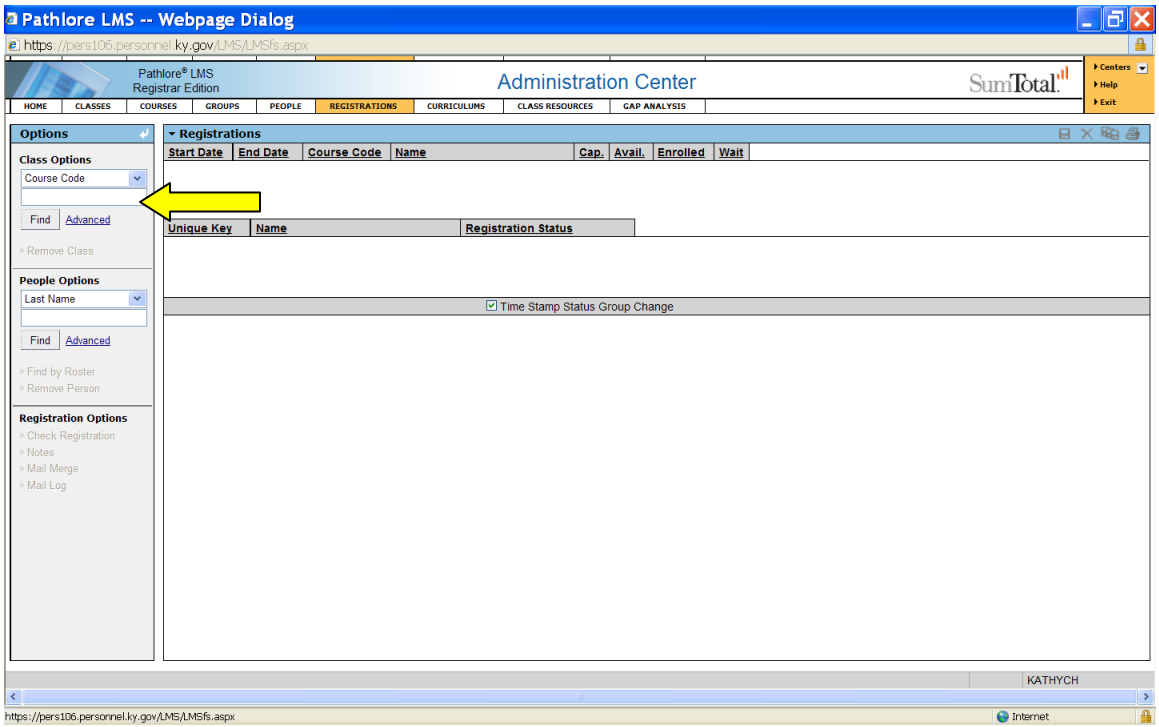
Register Individuals For Workshops

Registration can be handled in multiple ways. You can register from a person record or from with a class record.

This demonstration will show you how to register via the Registration Button.



Go to the Registrations Link

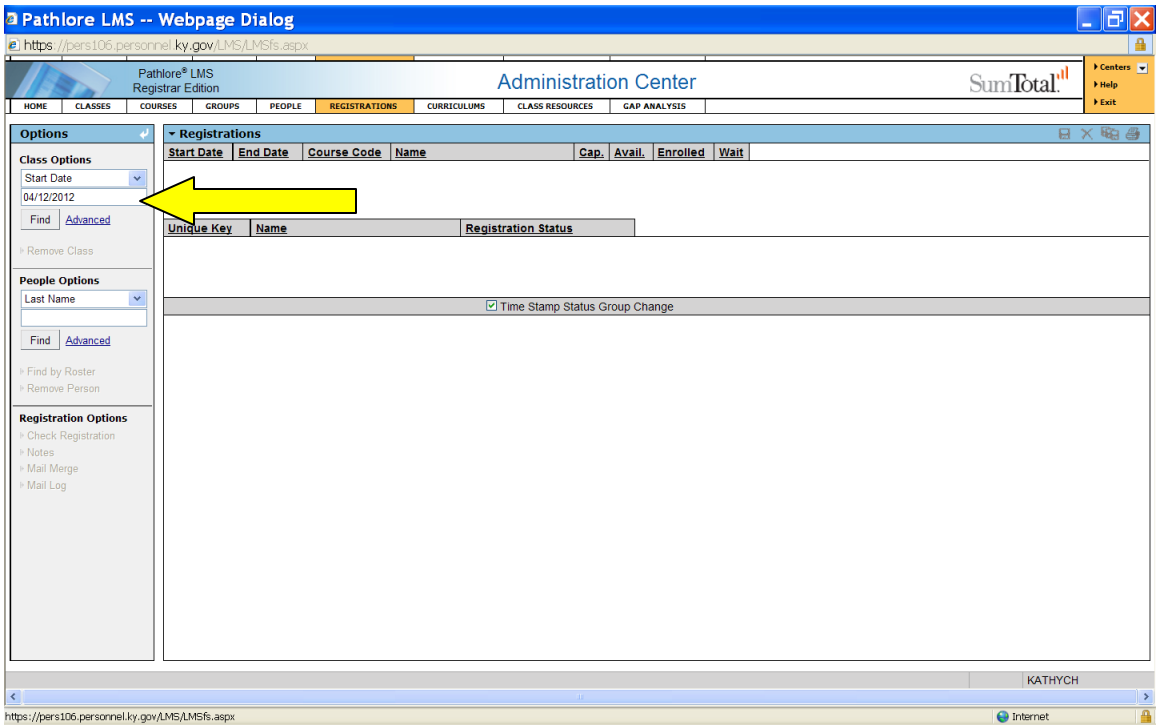


The class and people searches work the same way they do on the People and Classes links.

If you opened up Registrations from a class, the class will already appear at the top displaying the start date, course code, name, capacity, available, enrolled, and wait listed.

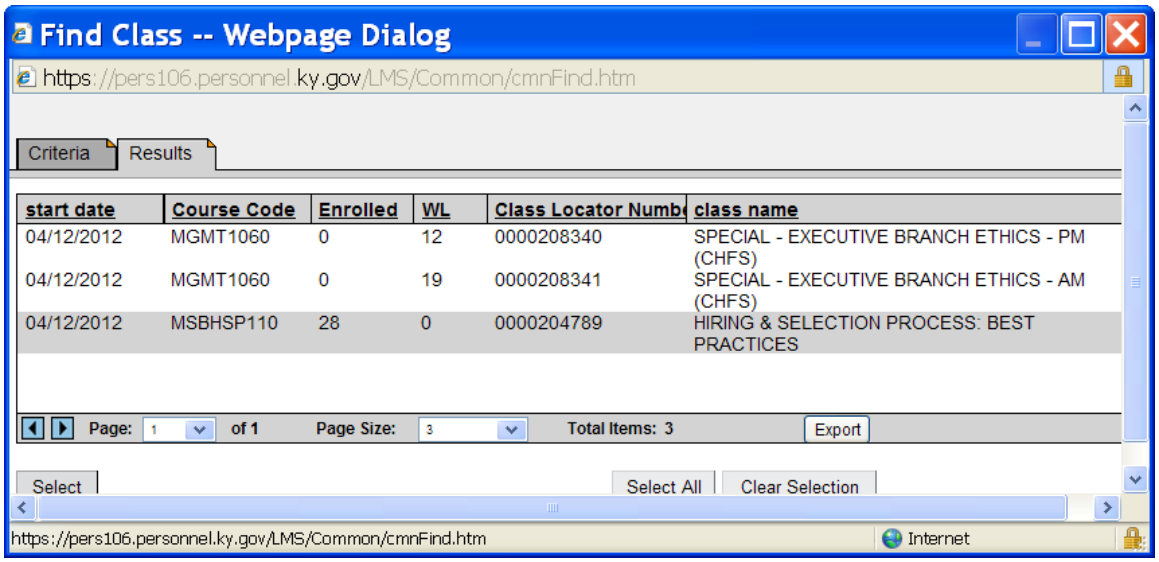
If you did not open Registrations from a class, you can search for the class you want by start date

> **TIP:** The Class Locator Number (if you have it) is always the best search option. It will take you directly to the class you are searching for.



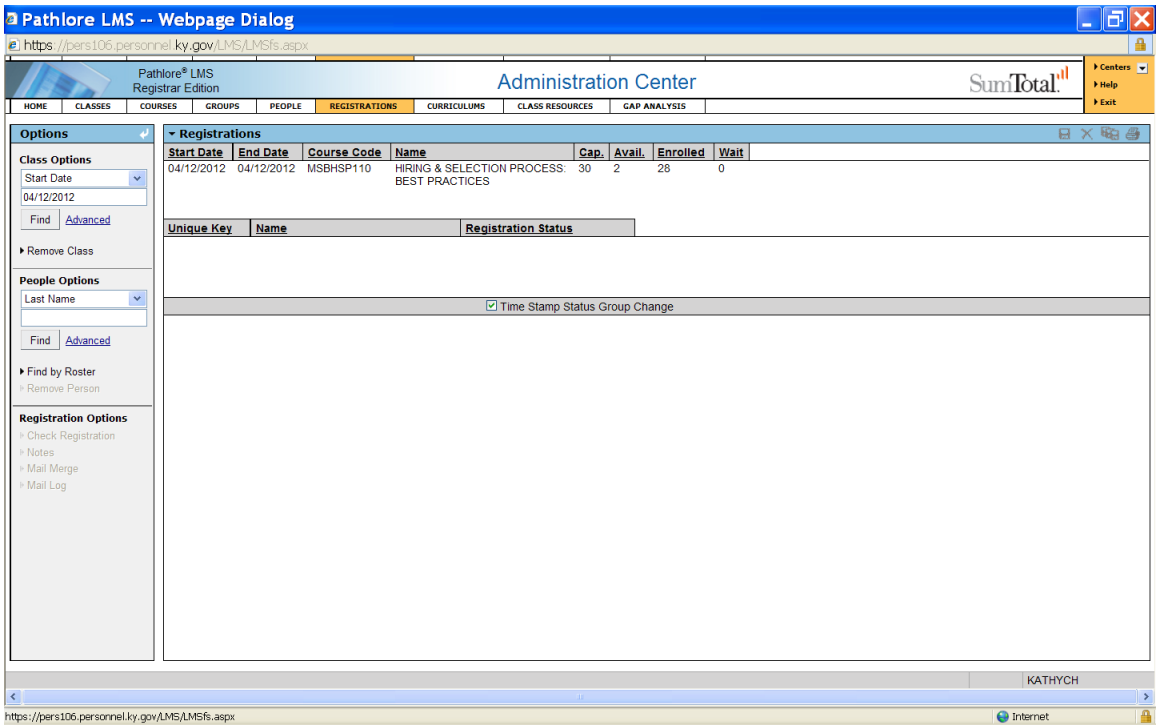
Search by class start date.

Click Find.



Highlight desired class.

Click the Select Button.



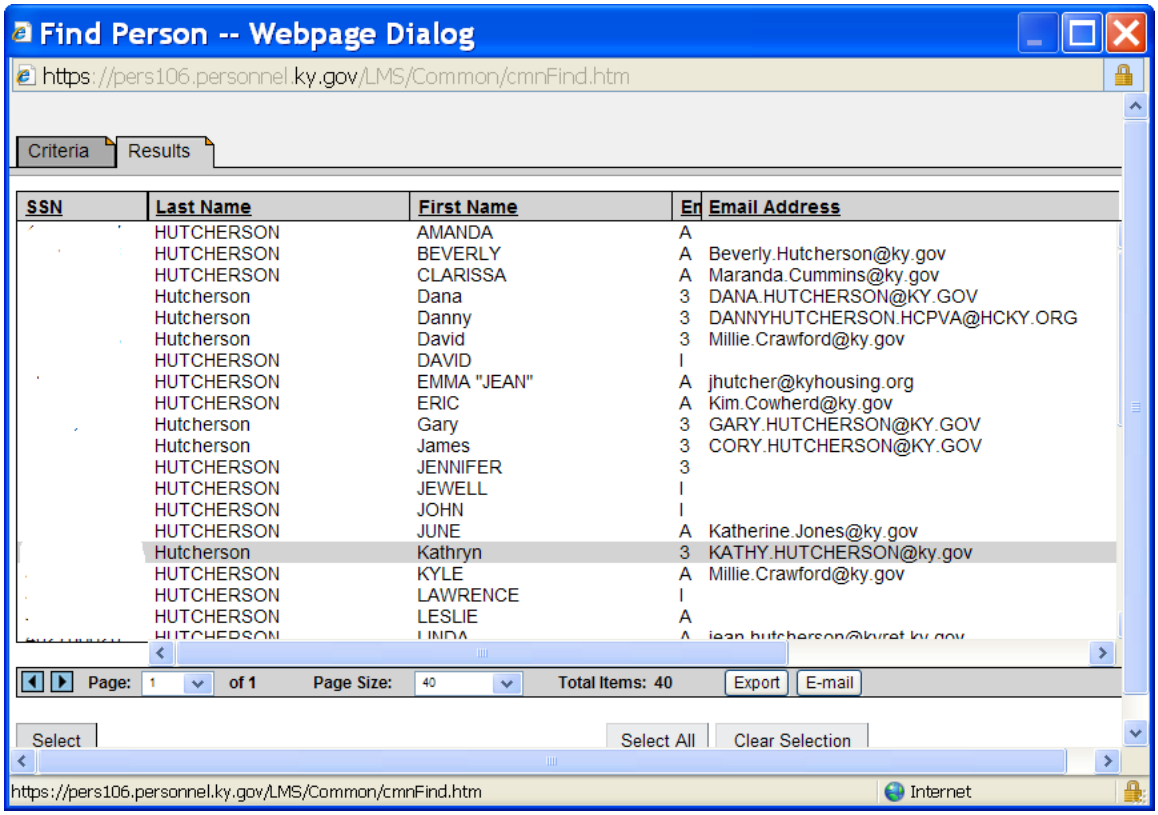
The class information is displayed in the upper section.

Notice the following field under class information:

Class capacity (Cap.) – total number of people that can be enrolled in the class
Available (Avail.) – total number of available slots left in class
Enrolled (Enrolled) – total number of participants currently enrolled in the class
Wait Listed (Wait) – total number of participants wait listed for the class

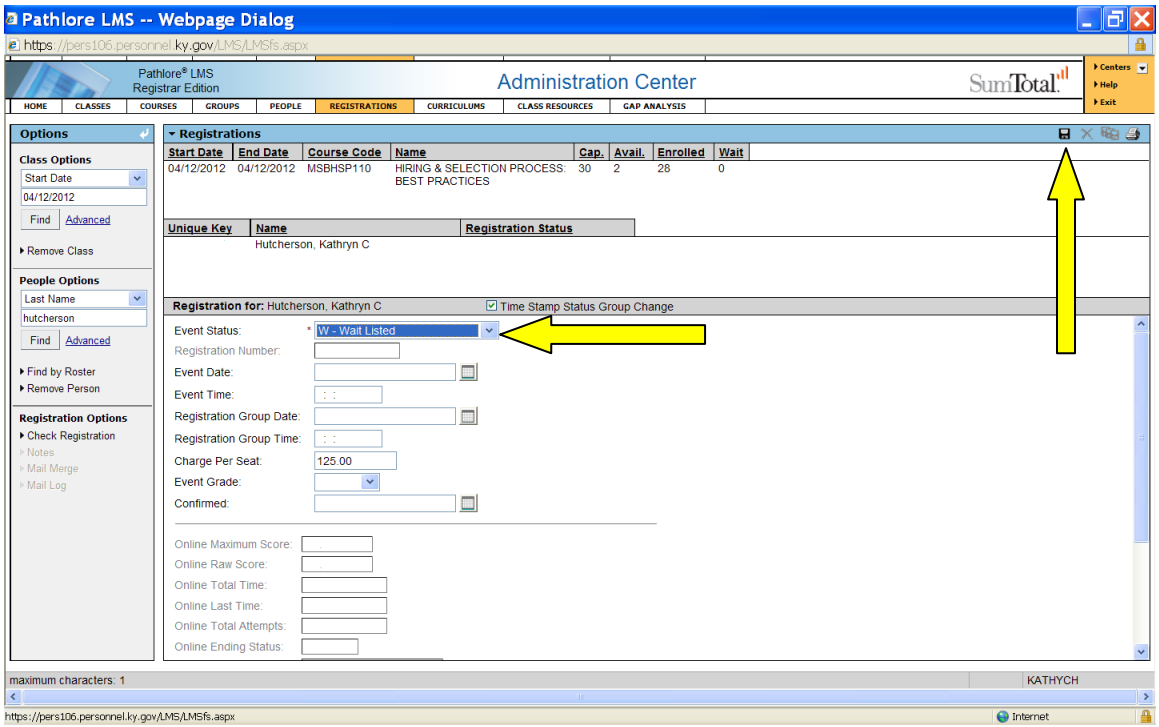
To **choose** a person to wait list/enroll key the last name in the people options box and **click** on the **Find** button.

> **TIP:** The Person SSN (if you have it) is always the best search option. It will take you directly to the person you are searching for.



Highlight the desired record.

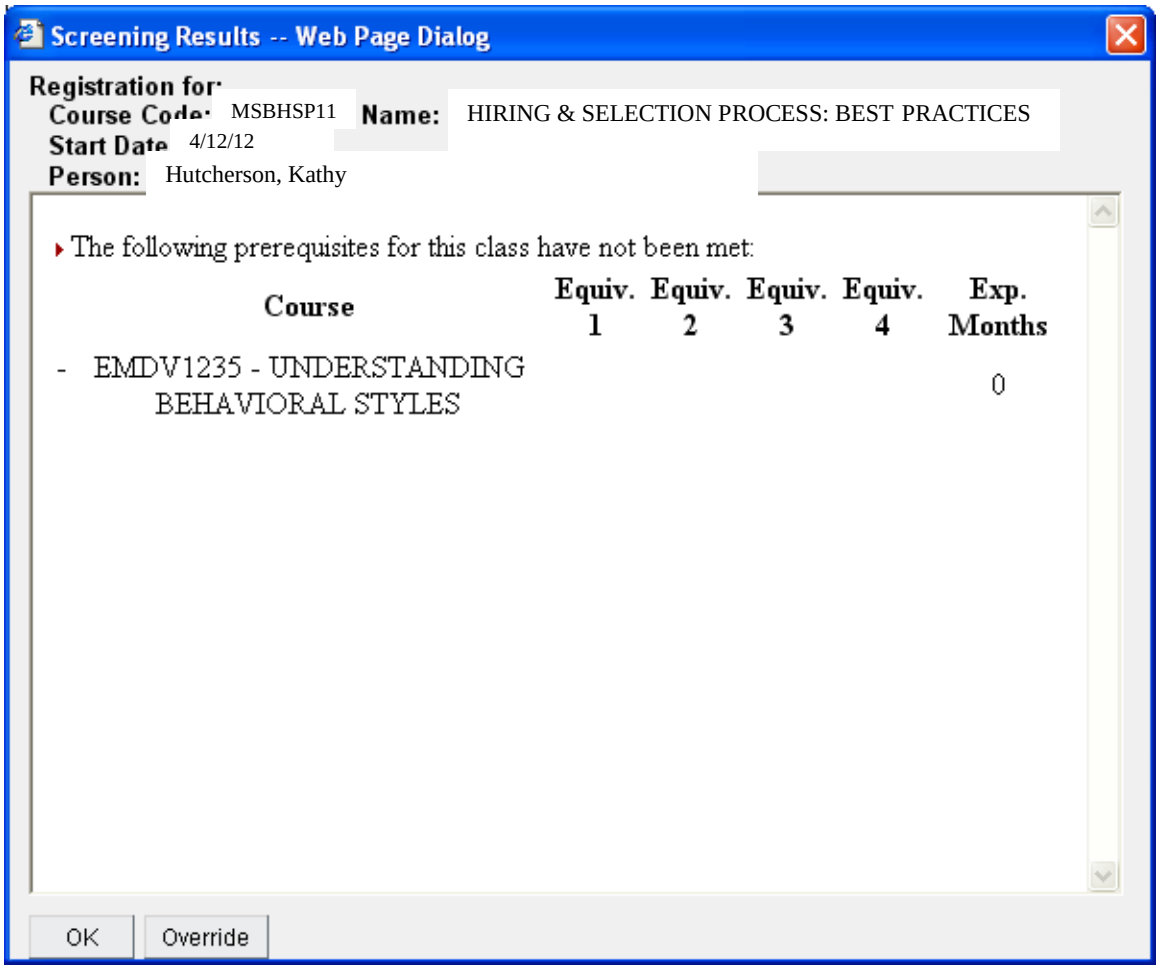
Click on the Select button



The person's name is displayed in the middle section.

Choose the appropriate Event Status –
If it is a class that was setup by your department, you can Enroll participants. If your department is not conducting the training, you **Wait List** participants.

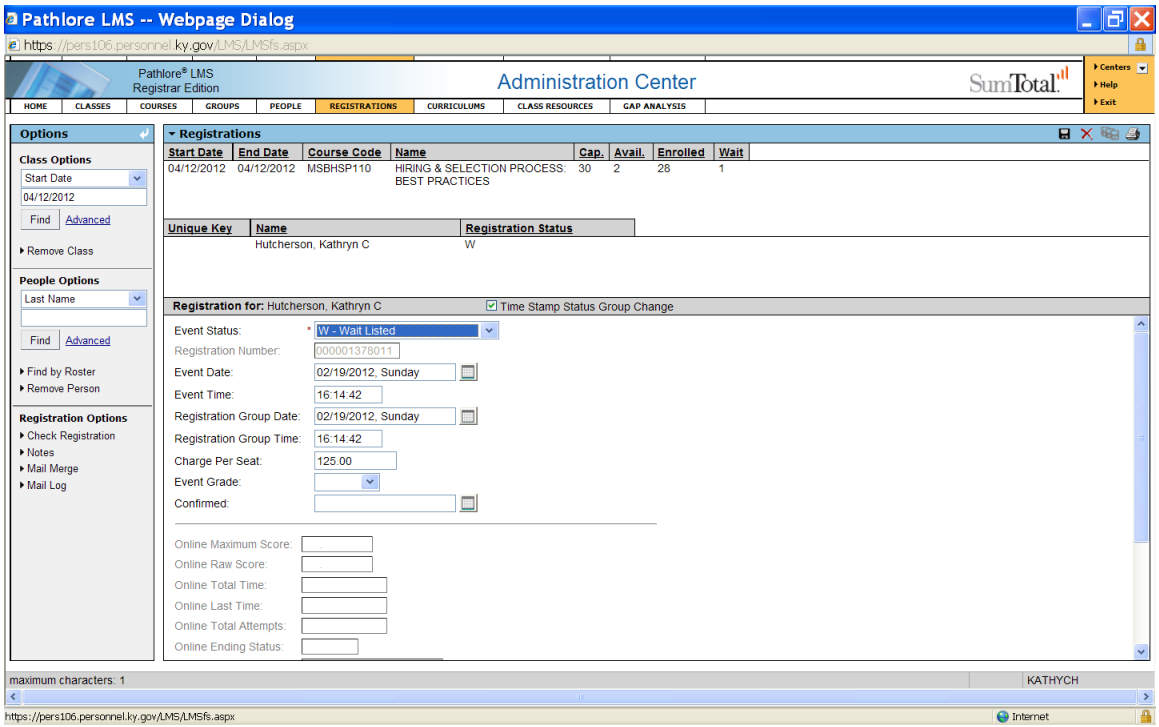
Click on the Save ( ) button in the upper right.



A screening box may pop up. You may or may not have the rights to override a screening.

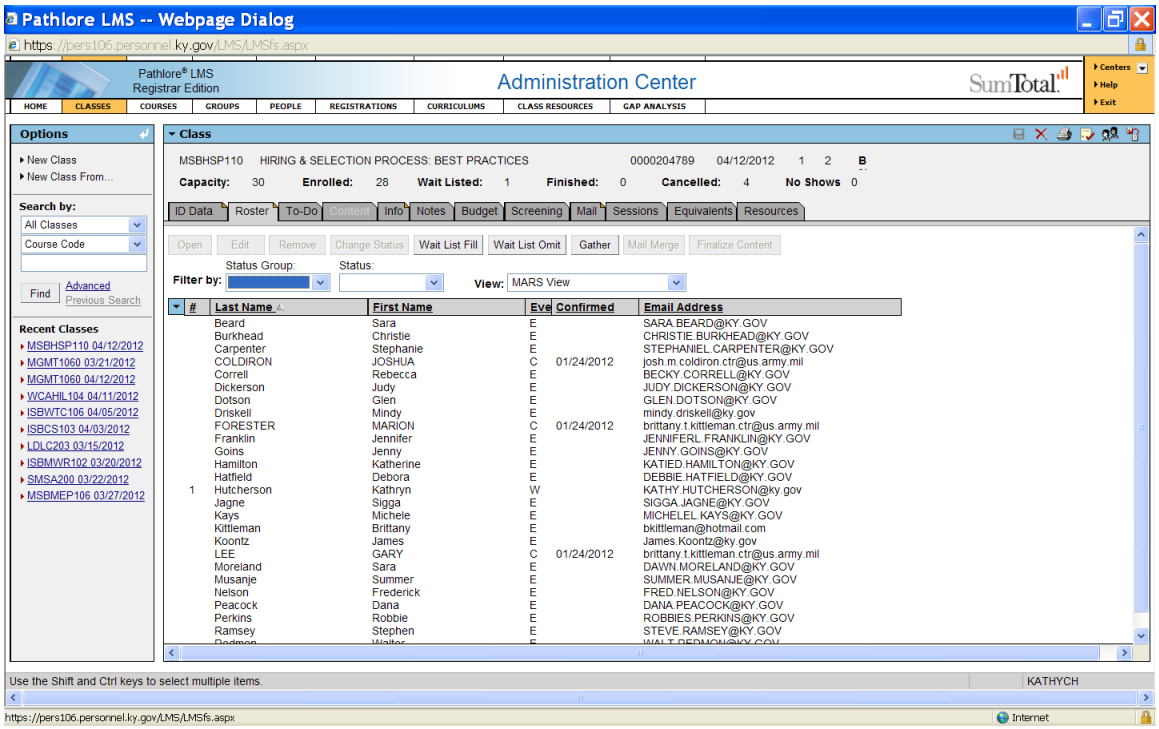
Override means that Pathlore will go ahead and enroll the person in the class. If you click OK, the person will not be enrolled.

Note: This box provides information regarding the registration of a particular participant. If there are perquisites for a class that have not been fulfilled you will receive this box. If a participant is scheduled for another class on the same day, you will receive this box. If a participant has already had this class, you will receive this box. **Choose** the appropriate response.

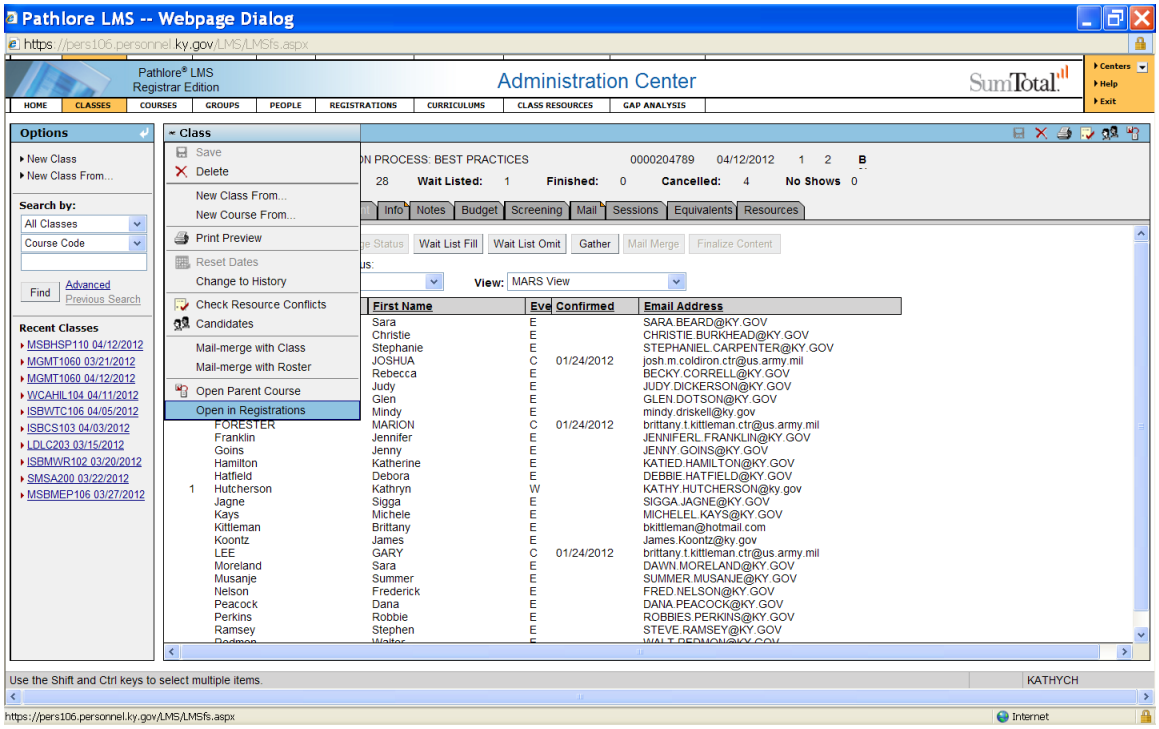


If you can override, the record will be saved.

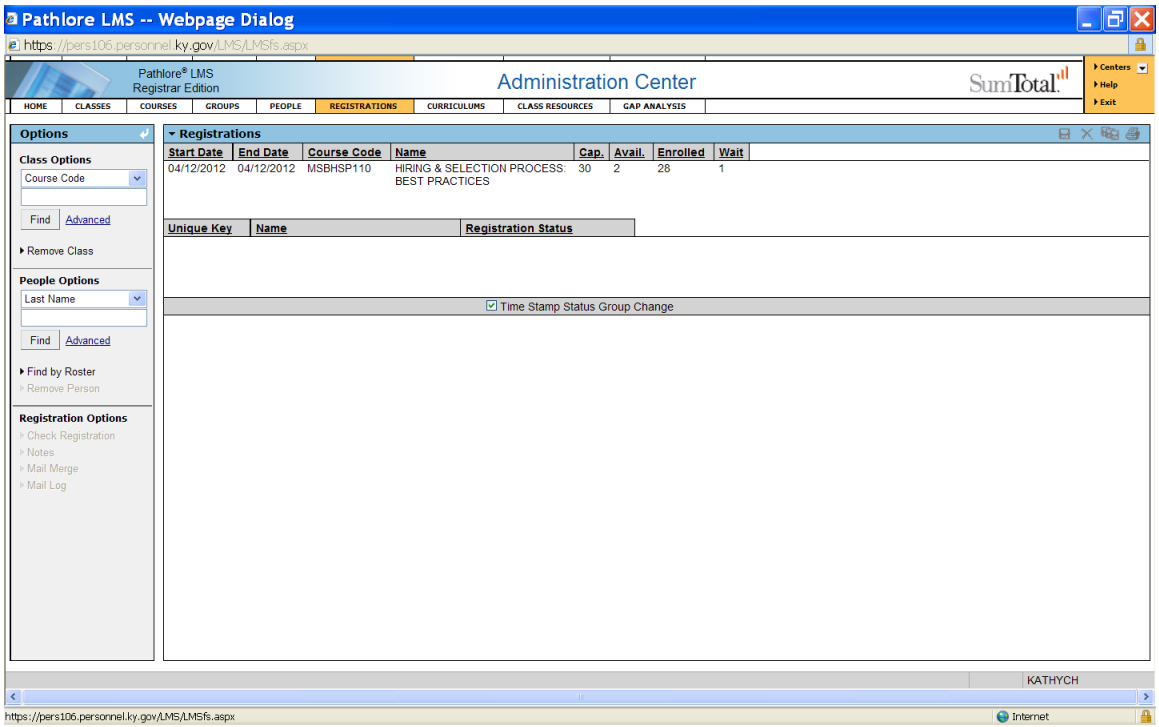
To Add A Person To A Class Roster



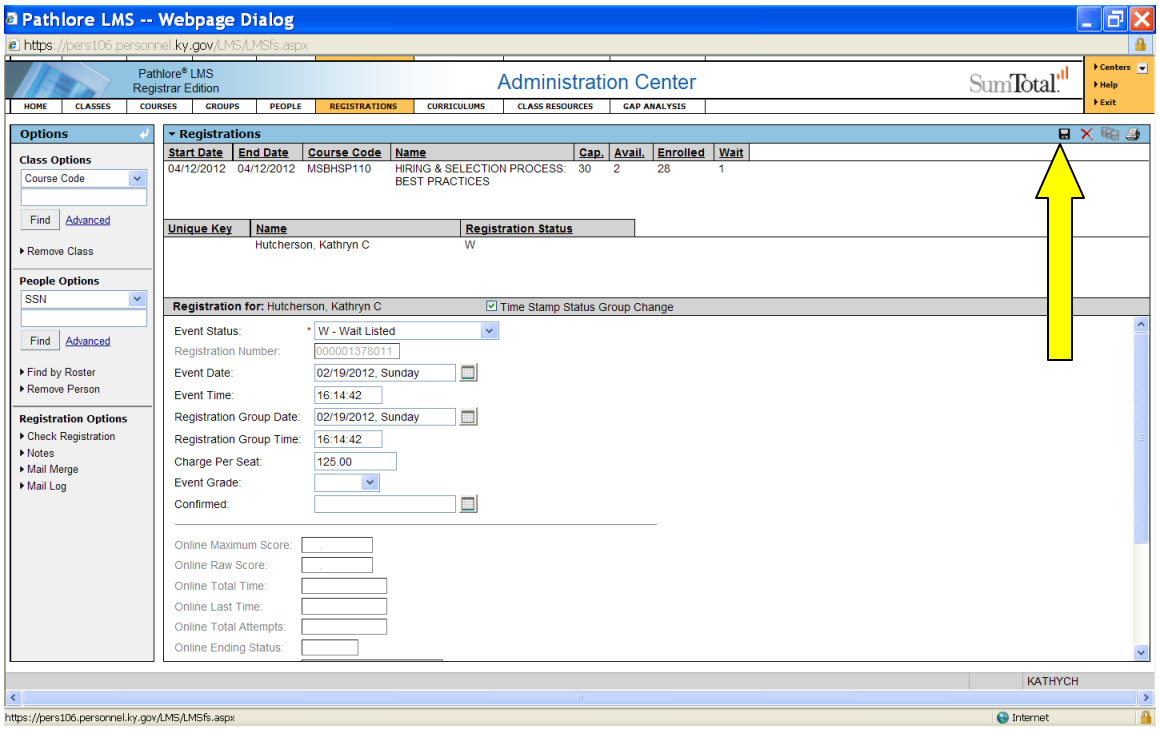
Open the desired class and go to the roster.



From the class drop down list **choose** Open in Registrations



Using SSN or Last Name, **find** the person to be added to the roster

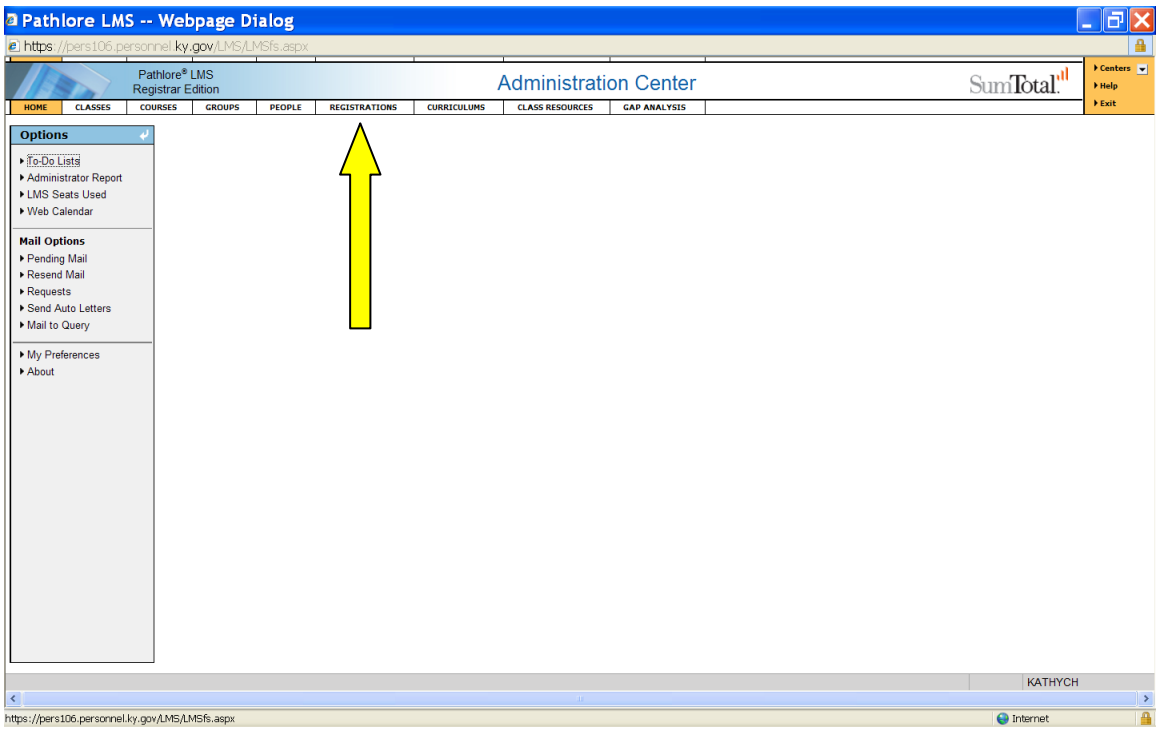


From the drop down list **choose** the desired Event Status

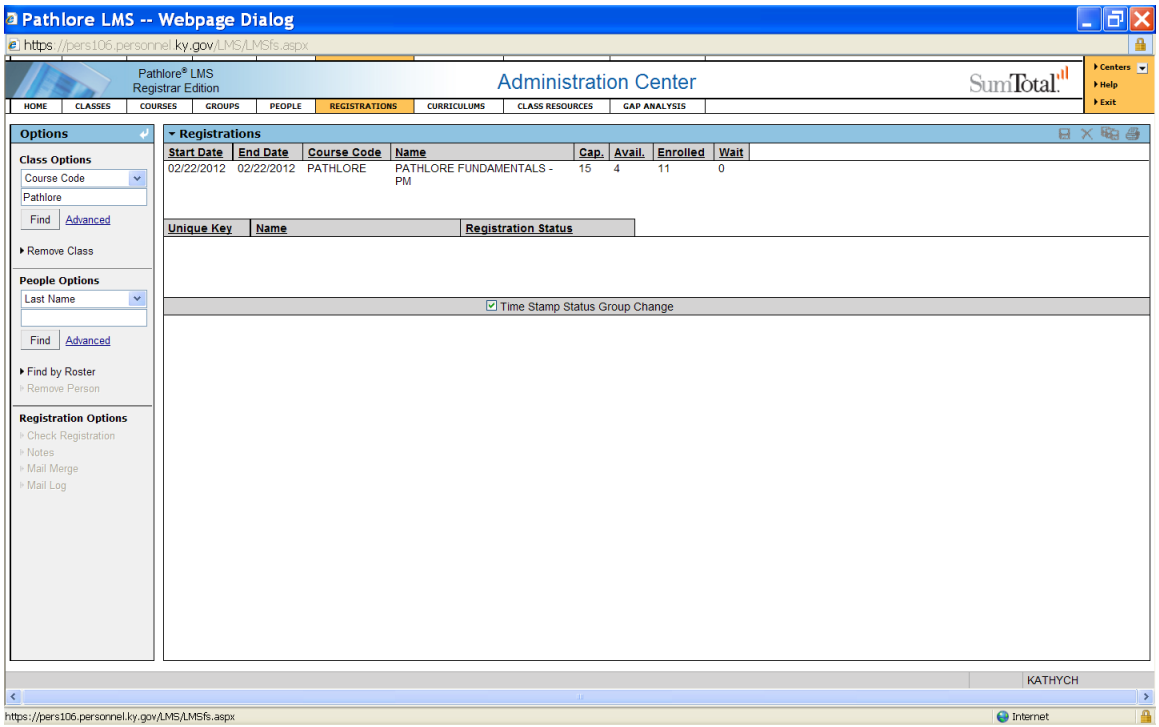
If it is a class that was setup by your agency, you might have the ability to Enroll a participant. If it is an GSC or eMARS class, you MUST Wait List the person.

Click on Save (🖫)

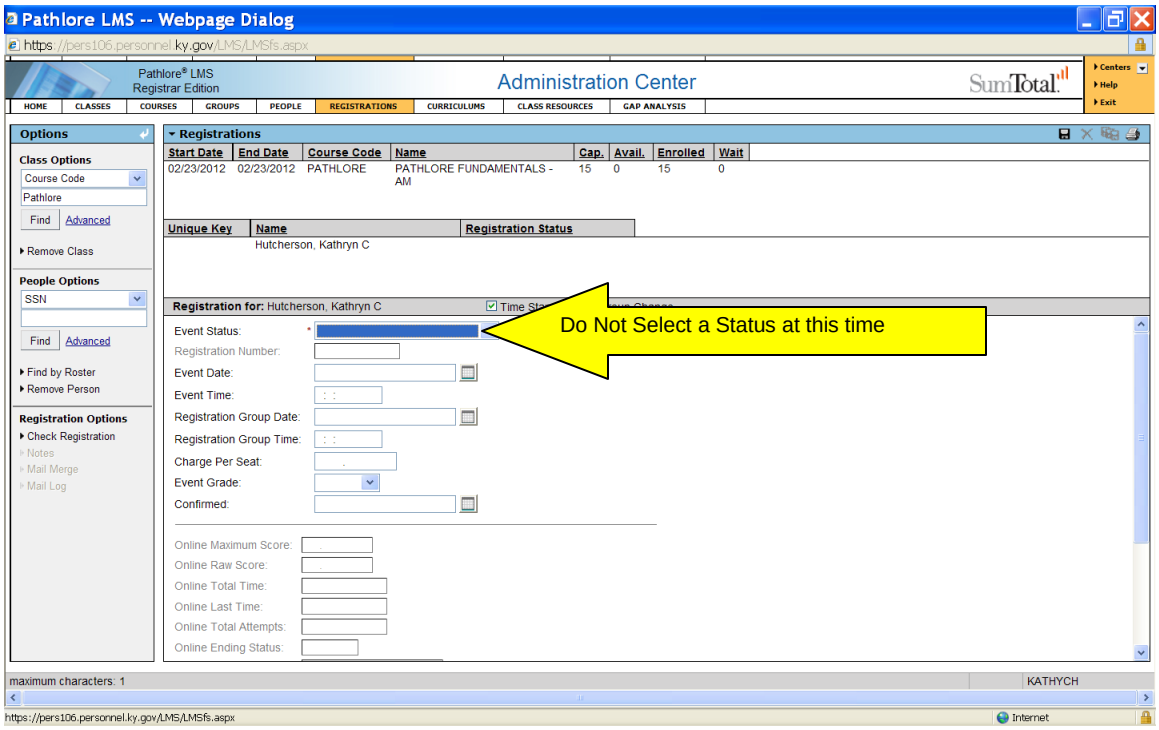
Wait Listing/Enrolling Multiple People For A Workshop (Batch Enrollment)



Click on the Registrations tab



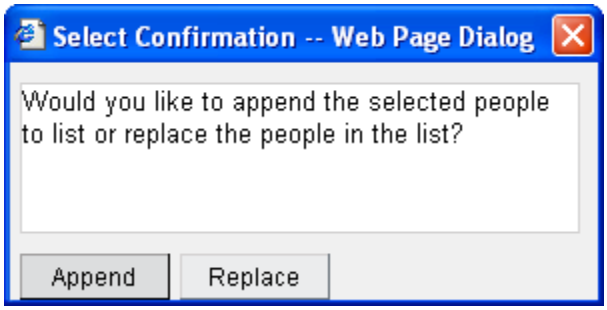
Search for a class.



Choose a person.

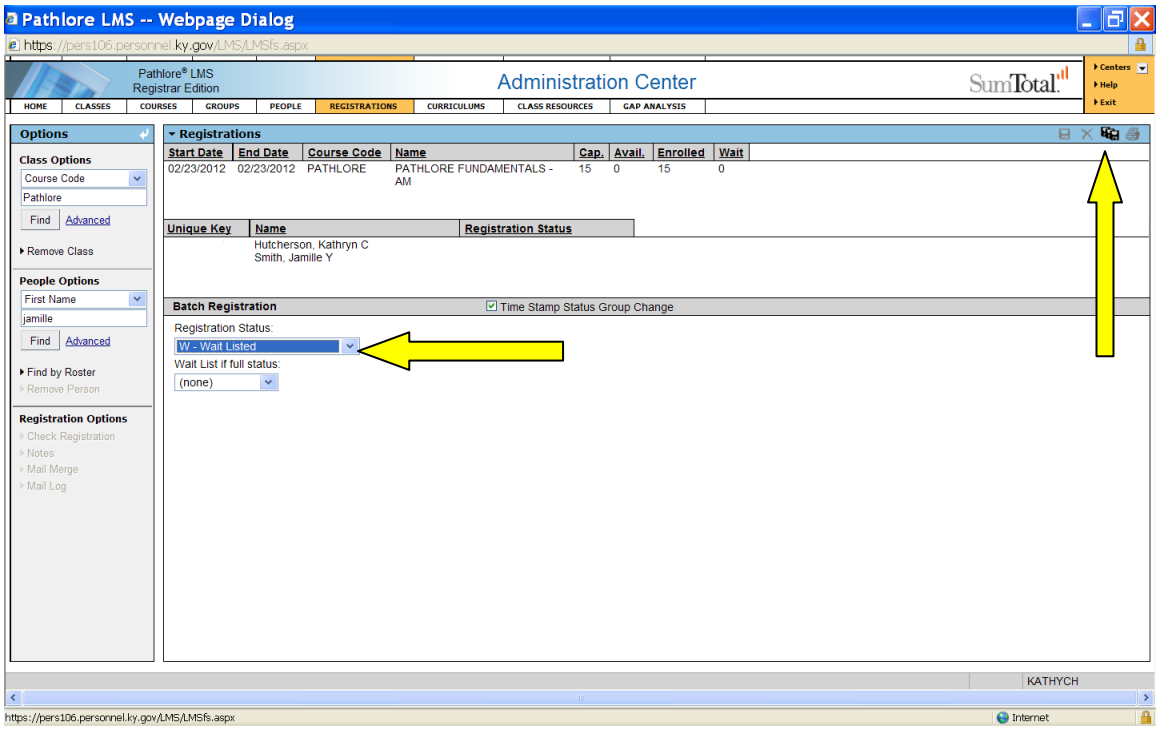
<u>IMPORTANT:</u> At this time, <u>do not</u> select an Event Status, just type in the last name or SSN of the next person you want to wait list/enroll.

You will receive a *Select Confirmation* box show on the next page.

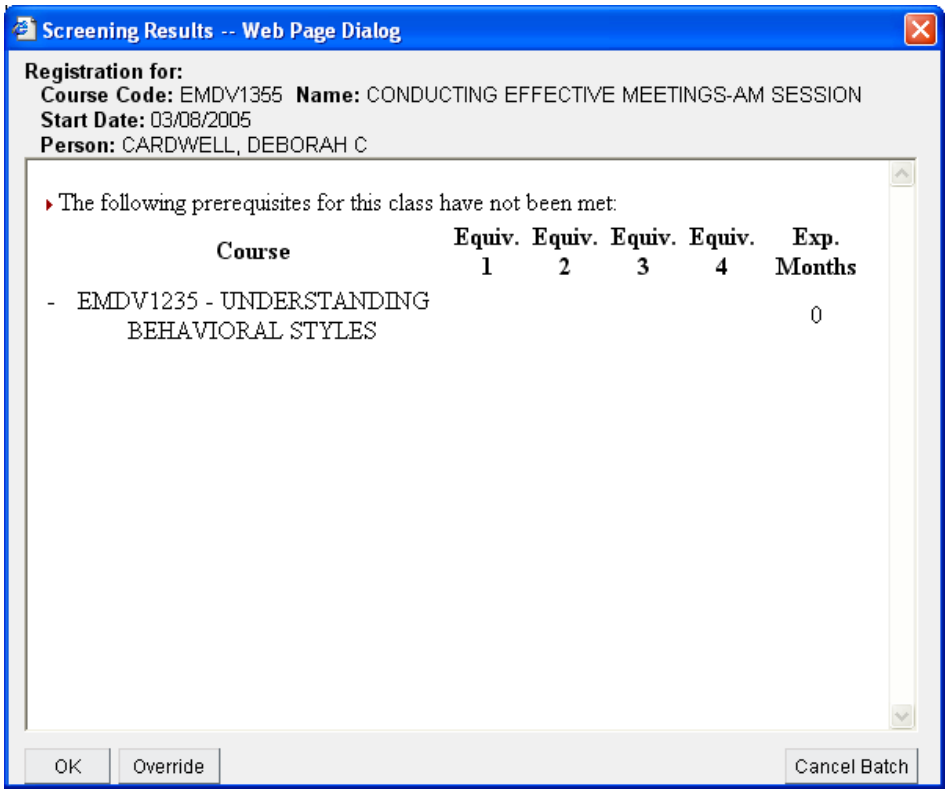


Choose Append when the Select Confirmation box pops up.

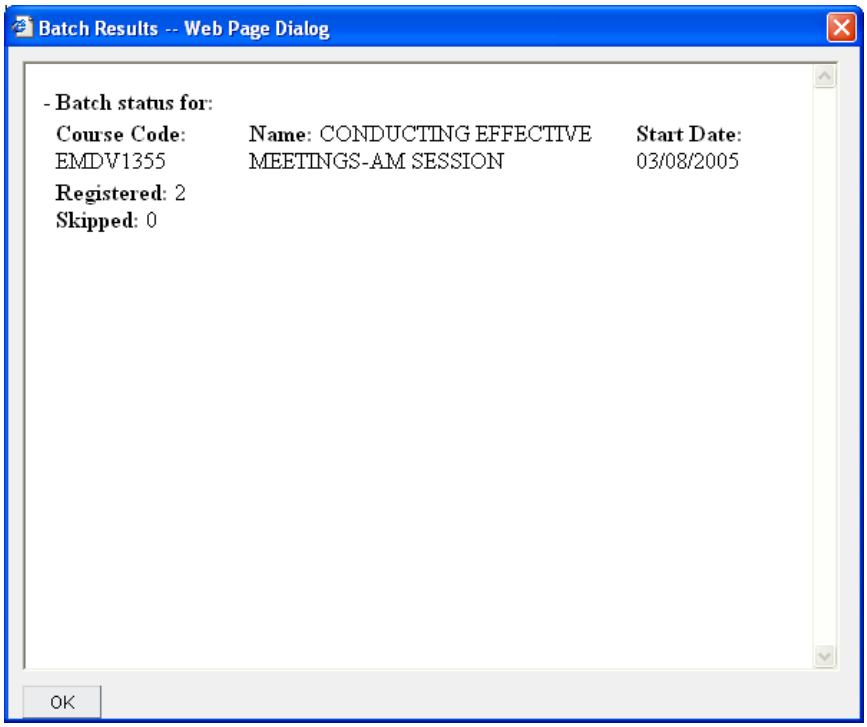
Continue to do this for each person you want to enroll/wait list.



Choose the appropriate status for the people you have sl from the Registration Status drop down and **choose** the Batch Add save button.



A screening results box could pop up. You may or may not have rights to override a screening.

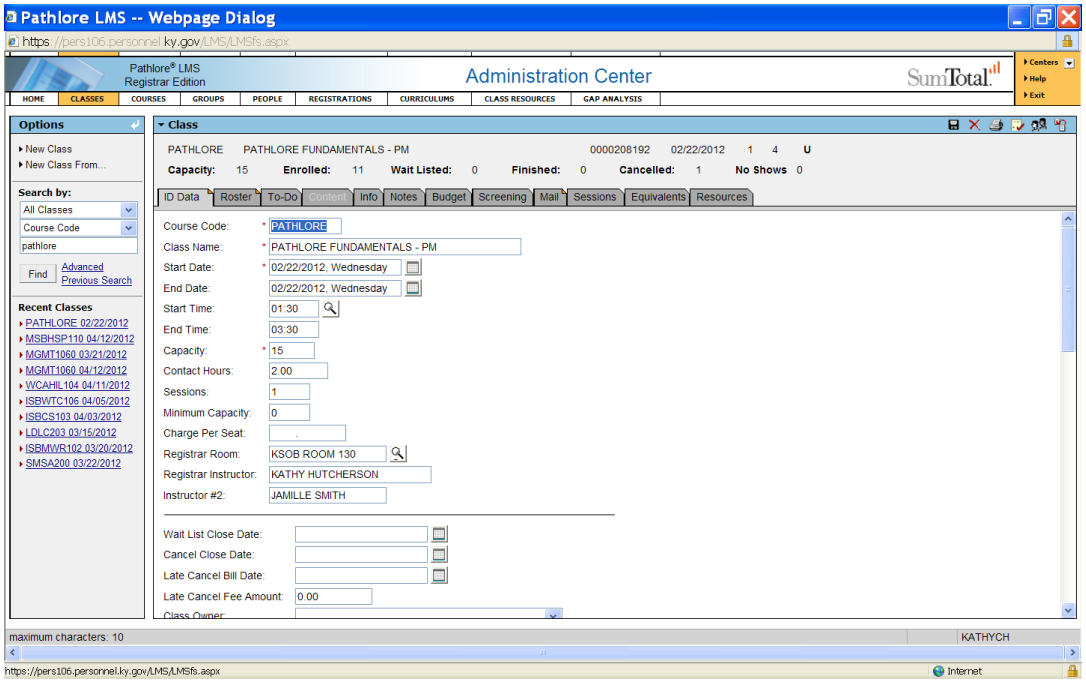


Click OK.

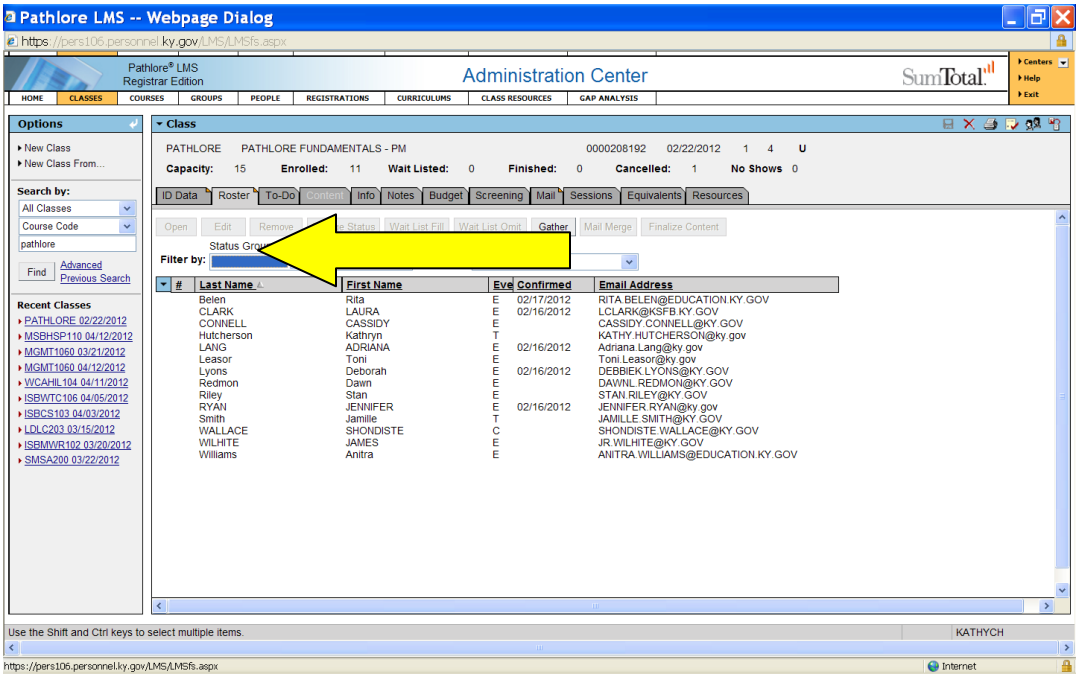
Copying And Pasting Registrations

You can copy and paste the registrations from one class to another if you have the same people in different classes.

Go into the class where the people are already on the roster.



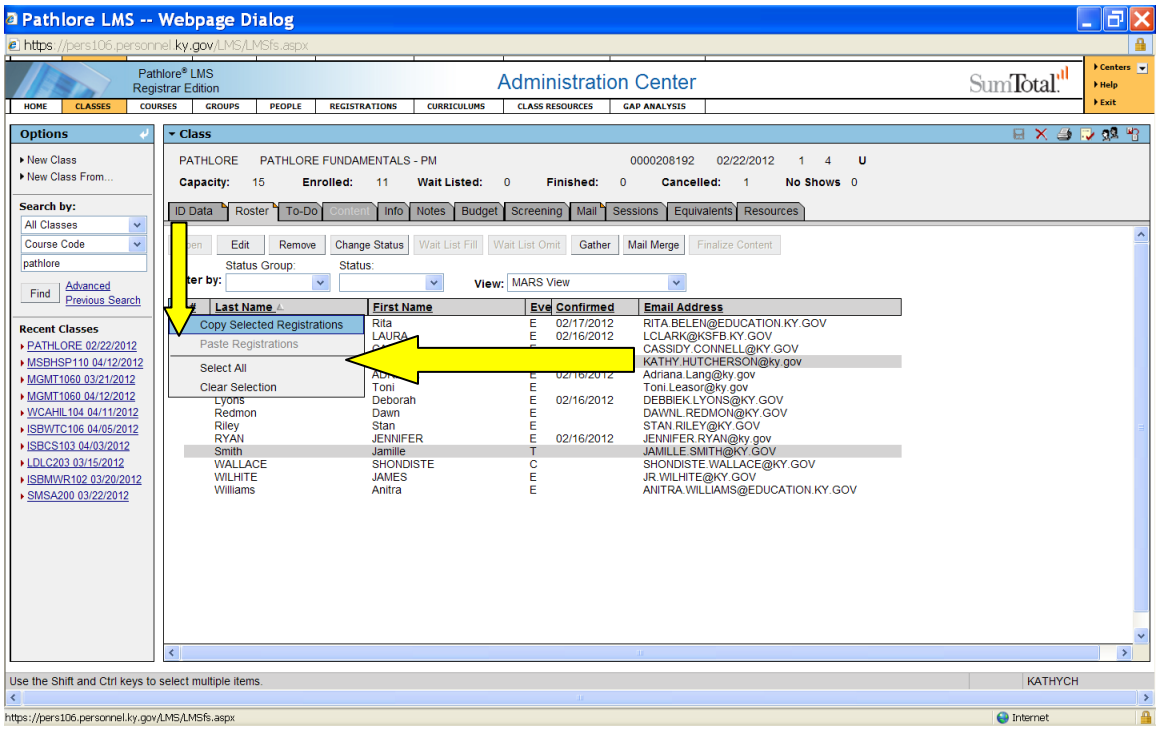
Click on the Roster Tab



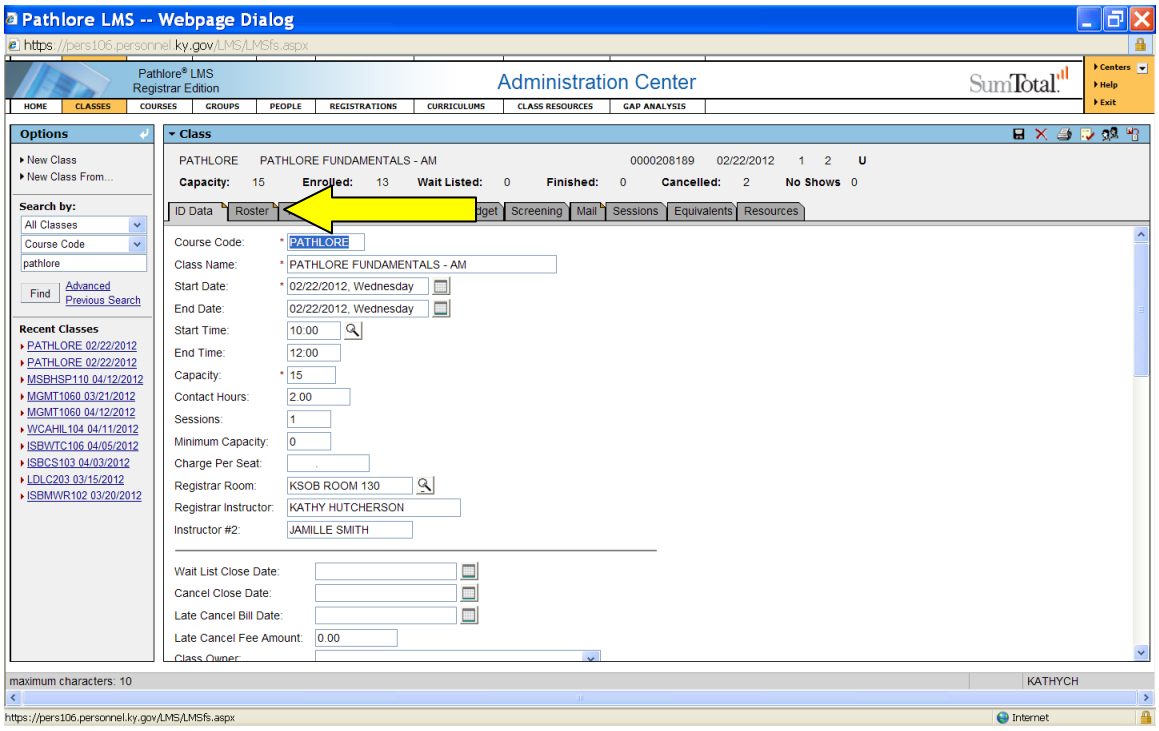
Select the names you wish to copy. (hold down the Ctrl key when selecting more than one name)

Click on the little blue arrow to the left of the people's names.

Click on copy Selected Registrations (these registrations are now copied to a clip board)

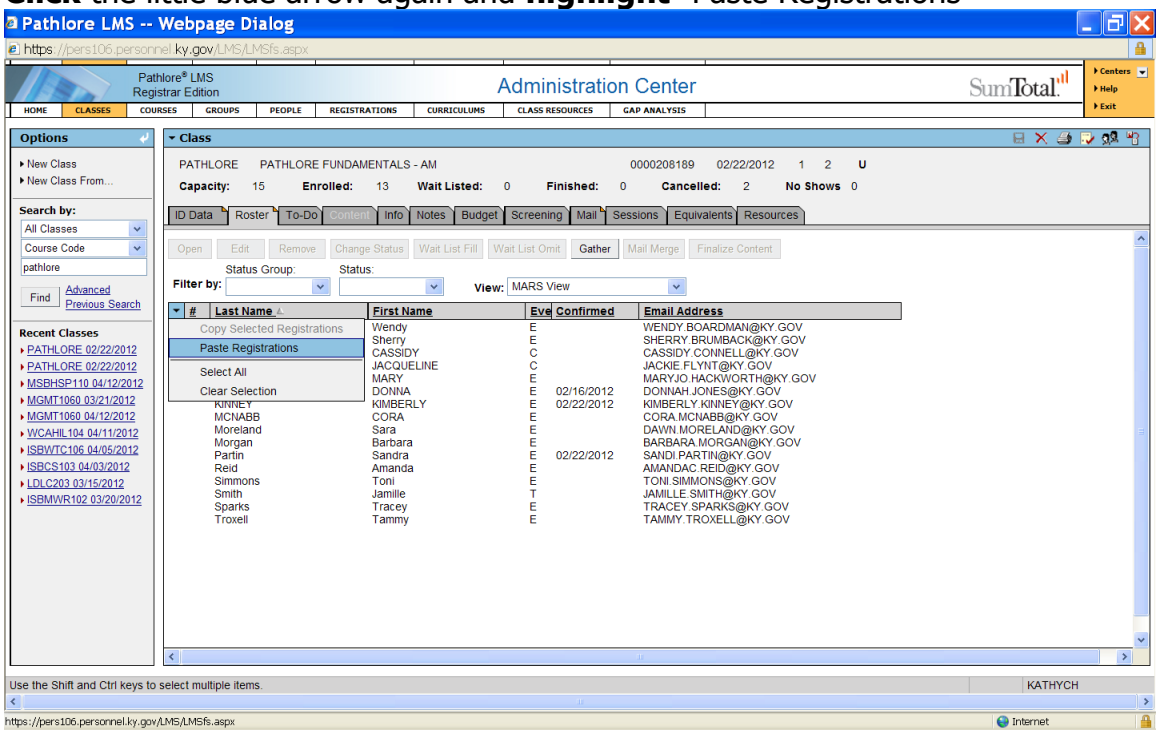


Locate the class you would like to copy the registrations into:

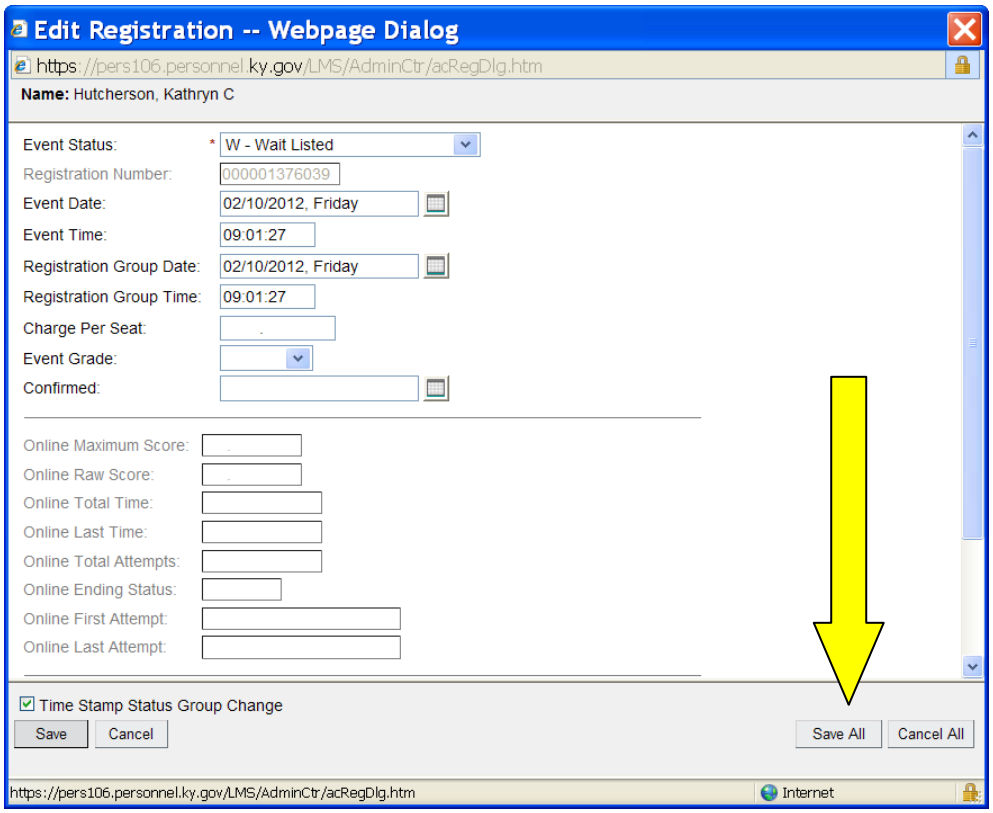


Click on the "Roster" tab of this class.

Click the little blue arrow again and **highlight** "Paste Registrations"

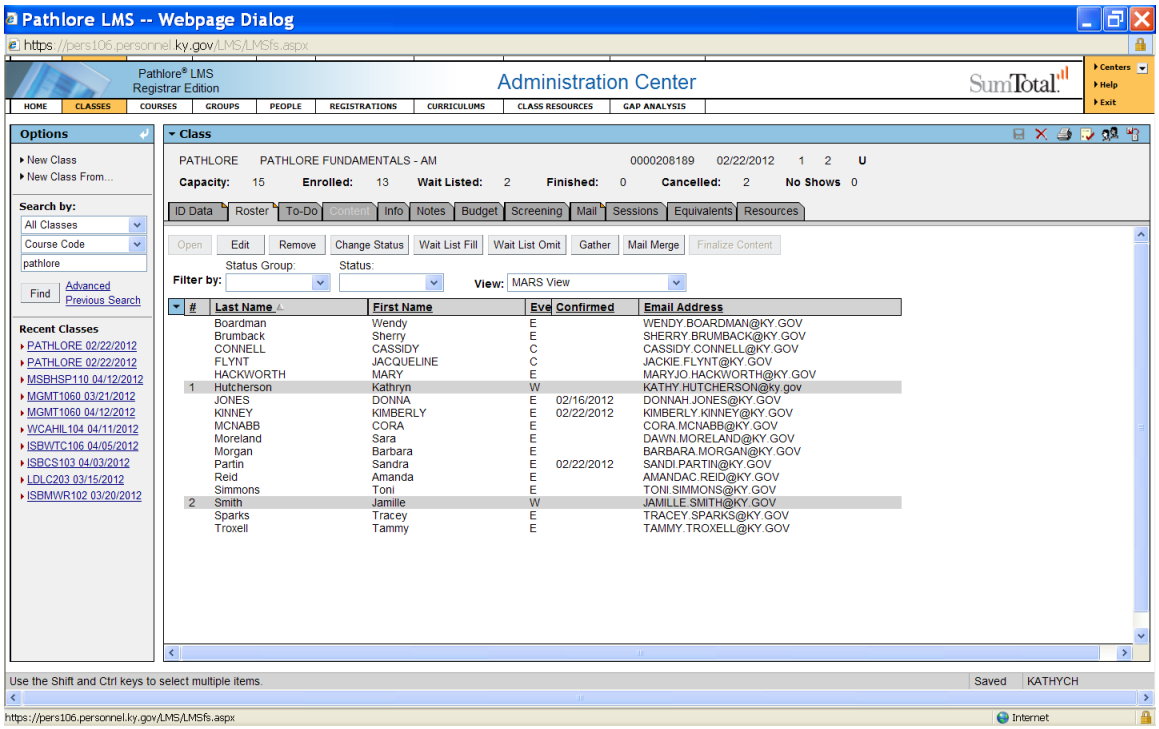


You will receive a pop-up box that allows you to select the appropriate event status for the class.



Pick the event status you want and **click** "Save All" to save all the participants you copied to the same status.

The participants now appear on the Roster tab for this class in the status you selected.



Pathlore Report Requests

To make a request for a report, please complete the following form that can be found on our website at http://personnel.ky.gov/GSC/empdev/register/ at the bottom of the page under Pathlore Report Requests.

The completed form should be emailed to Kathy Hutcherson at Kathy.Hutcherson@ky.gov or faxed to (502) 564-8170 X 247.

You should allow a minimum of five (5) working days for GSC to complete the request.

You must also fill out the request in its entirety and be as specific as possible. Let us know exactly what information you would like to appear on the report and what format you would like the report sent to you in. The report can either be sent in Excel or PDF.

The following page shows a completed Crystal Report Request Form.

PATHLORE CRYSTAL REPORT REQUEST FORM

Requested By: Wendy Campbell

Phone #: 502/564-7455 ext 235

Email Address: wendyl.campbell@ky.gov

Fax #: 502/564-8056

Date Needed (Allow a minimum of 5 working days to process requests): 04/15/2006

Mailing Address:
OEOD
KSU ASB 4-W, 400 East Main Street
Frankfort, KY 40601

Report Information Needed:

Cabinet (Required Field) Personnel

Cabinet # (Required Field) 55

Department # (Only required if you want department specific information) 790

Division # (Only Required if you want division specific information) 5

Description of Information Needed:
(Please explain in detail the report that you need)

All training taken by OEOD employees between 1/1/05 and 12/31/05 - sorted alphabetically

Please mark the appropriate boxes to indicate which fields you need to have shown on the report

☐ SSN ■ Last Name ■ First Name ☐ Course Code ■ Class Name ■ Start Date

■ Event Status ☐ Event Grade

☐ Other (Please Explain) Only show Active Employees

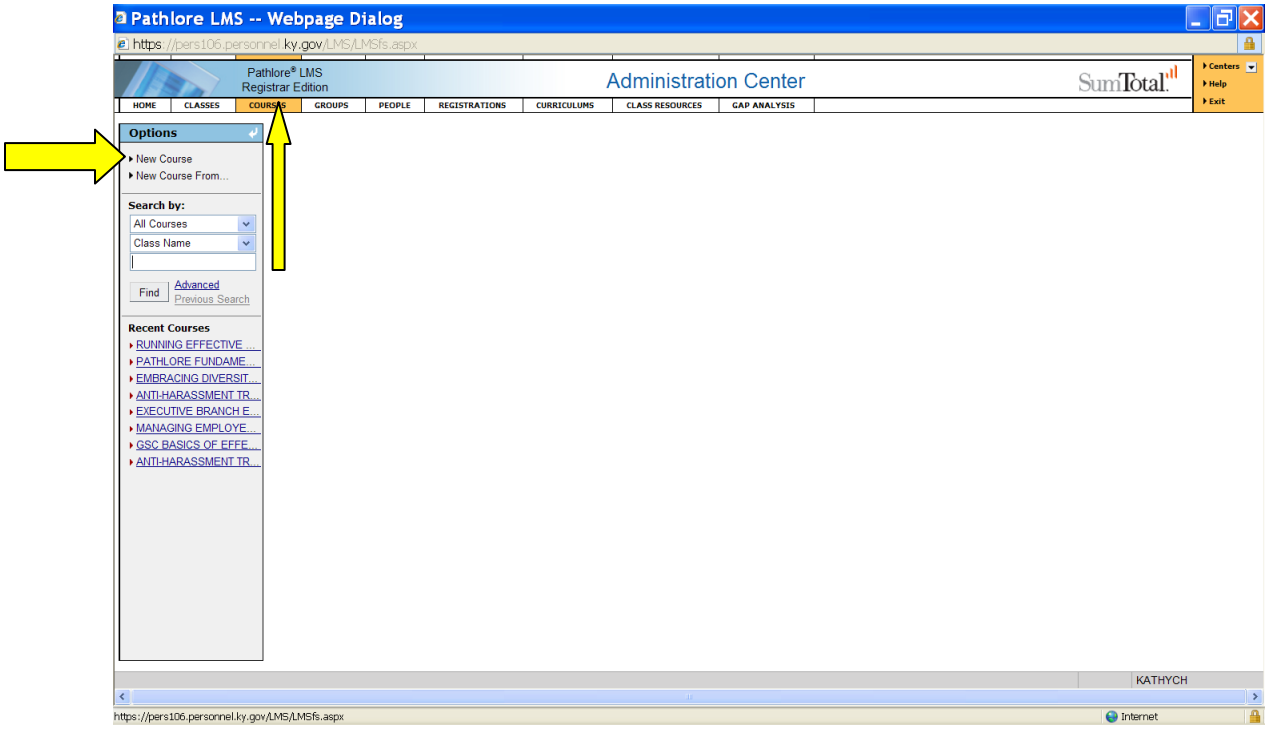
Please indicate how you would like your report returned:

■ Email ☐ PDF

☐ Fax ■ Excel

Send Completed Form to Wendy Campbell at wendyl.campbell@ky.gov or Fax to (502) 564-8056

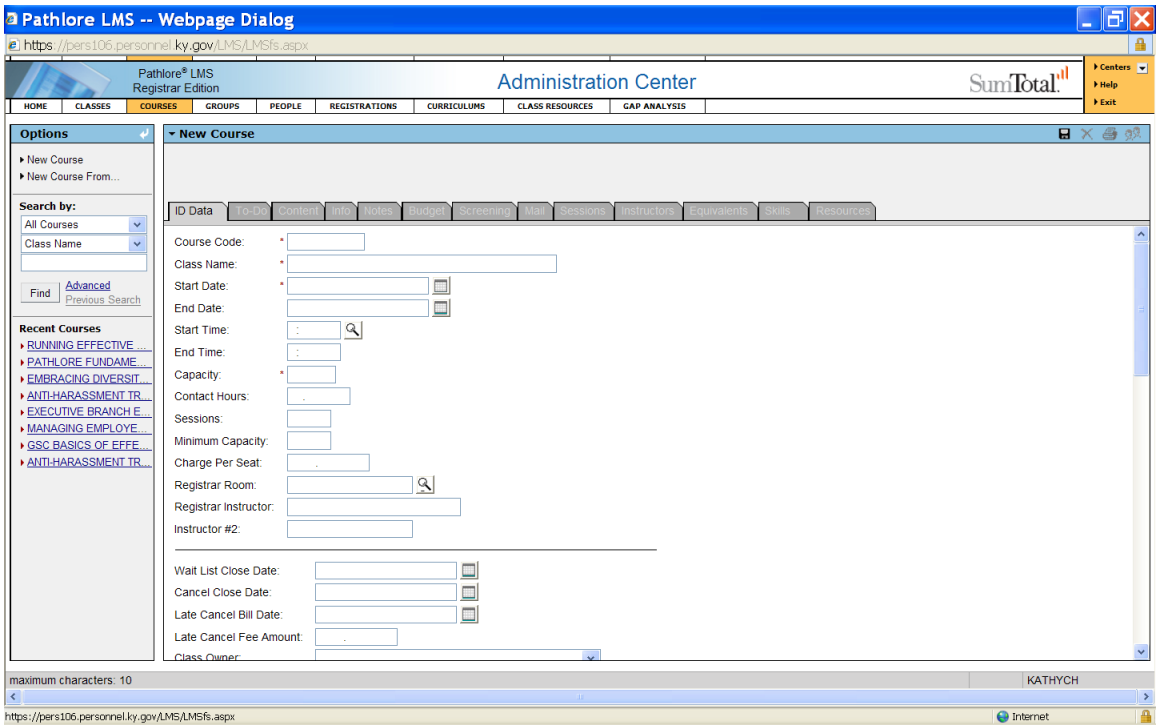
Create a Course



Click on the Courses tab on the toolbar

Hit the New Course link on the top left side

> **Note:** You want to create a course when you will have multiple classes that are the same and you can use the course as the template for the classes. If you have any questions, please contact GSC.



This will provide you with a blank course listing.

Please see the next page for all required information to set up a course.

The following information is required:

Course Code – Course code is alpha/numeric and should be 6-10 digits. The following is a suggestion for establishing course codes as provided by EPPC:

- The first three characters would be ***EPP*** for the Environmental and Public Protection Cabinet. All courses used by EPPC cabinet would have EPP as the first three characters
- The next three characters would be for departments within our cabinet, ***OOS*** for Office of the Secretary, ***DPP*** for Department of Public Protection, ***DEP*** for Department for Environmental Protection, ***DNR*** for Department for Natural Resources, and ***DOL*** for Department of Labor. This would vary according to the departments.
- The last four characters would signify the type of training. ***GSC*** for Governmental Services Center, ***CPMP*** for Certified Public Manager Program, ***eMAR*** for enhanced Management and Administrative Reporting System Training, ***COMP*** for EPPC Desktop Computer Training, ***OSVT*** for Outside Vendor Training, ***INHT*** for In-House Training, ***OSTR*** for Meeting: Organized Structured Training, and ***CFWS*** for Conference/Workshop ***.*** This would vary according to the type of training the employee is receiving.
- A complete course code would look like this: EPPDPPGSC

Class Name – Title the class

Start Date – Put in a fictional future date if you would like the course to be available for an extended amount of time (ex. 1/1/2020)

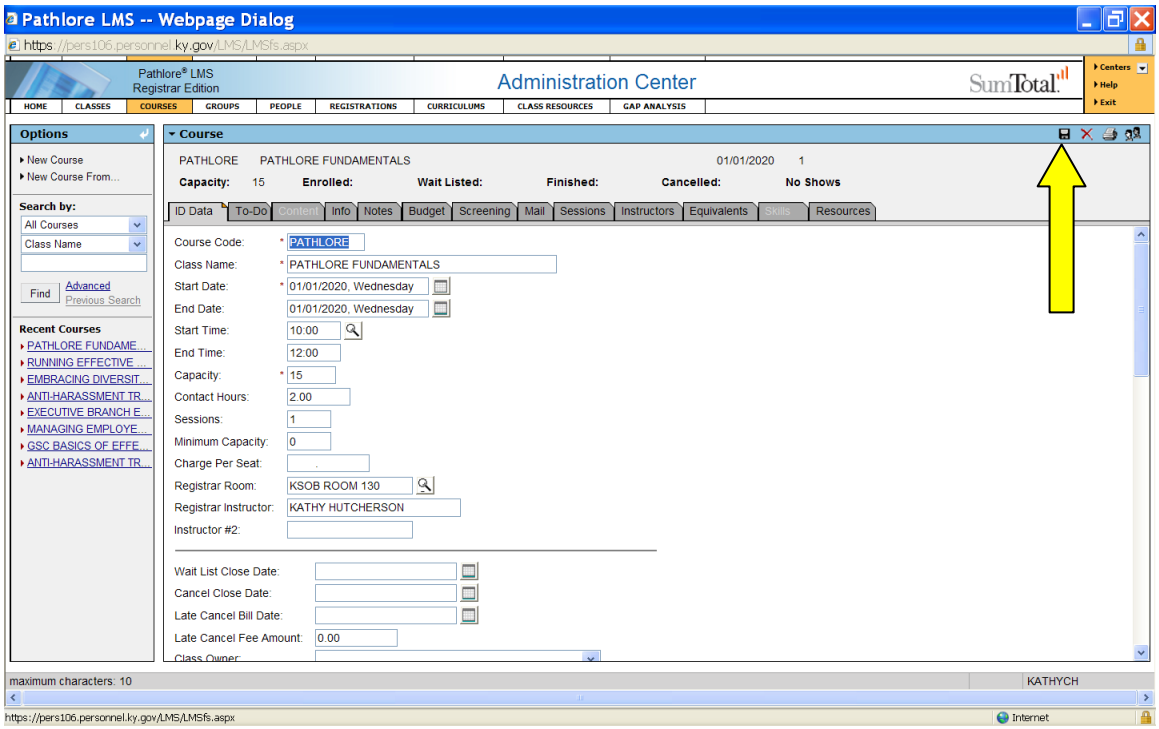
End Date – If the course is one day put the same day as the start date, a day later for two day classes and so on (ex. 1/2/2020). This will allow your end date to be automatically calculated when you use this course to create a class,

Capacity – This is maximum number of students that will be in the class. (This number may be modified for a particular class when you use this course to create a class)

Class Owner – This specifies which agency will use this course code

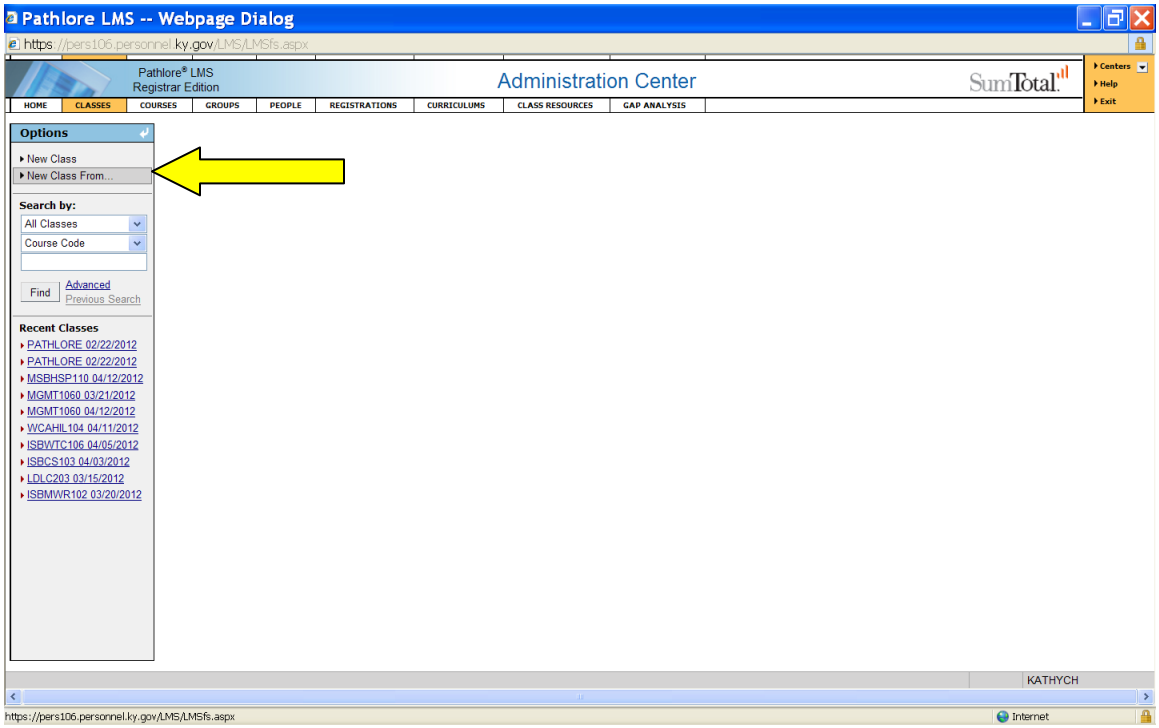
All other field information is not required, however we suggest you put in as much information as you can, because this will save you time later when you are setting up your classes.

After all information has been entered, **hit** the Save ( ) and the course will be saved.

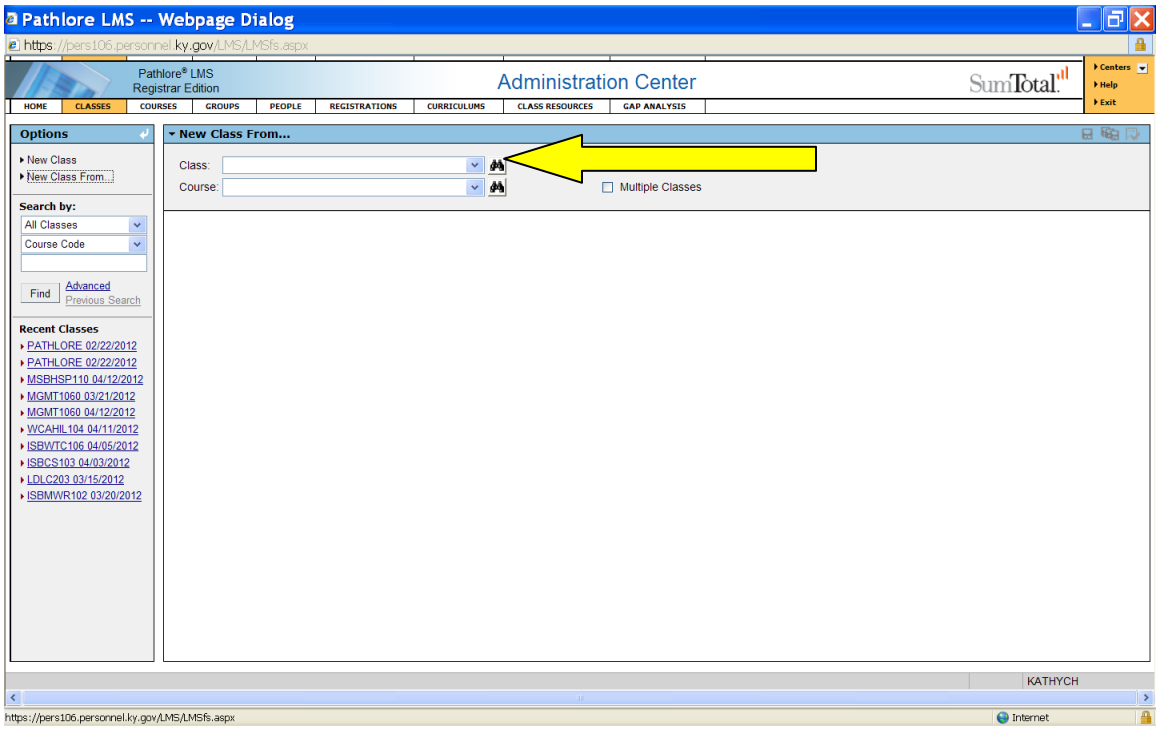


Create a Class from an Existing Course

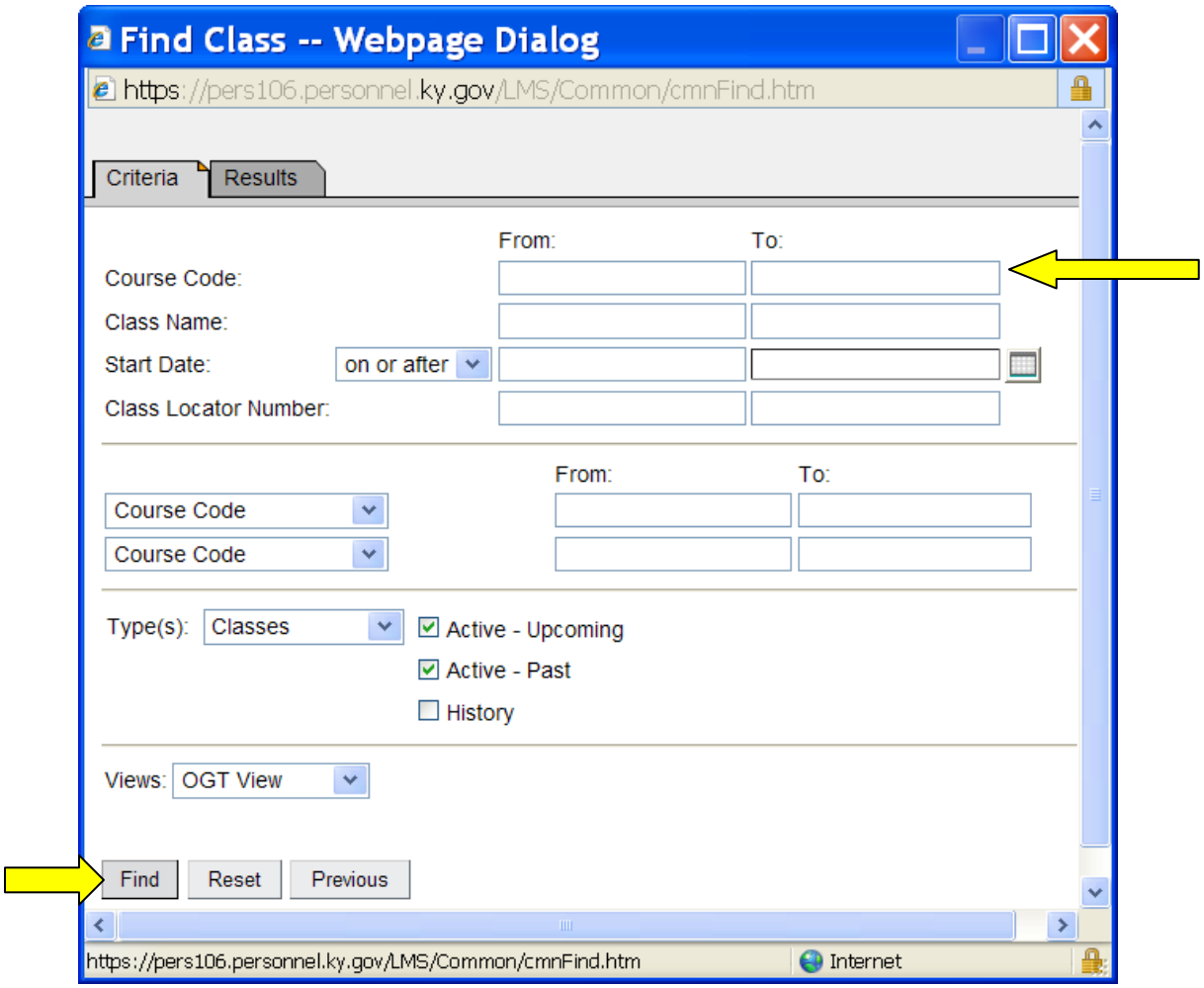
From Classes Tab, **highlight** New Class From



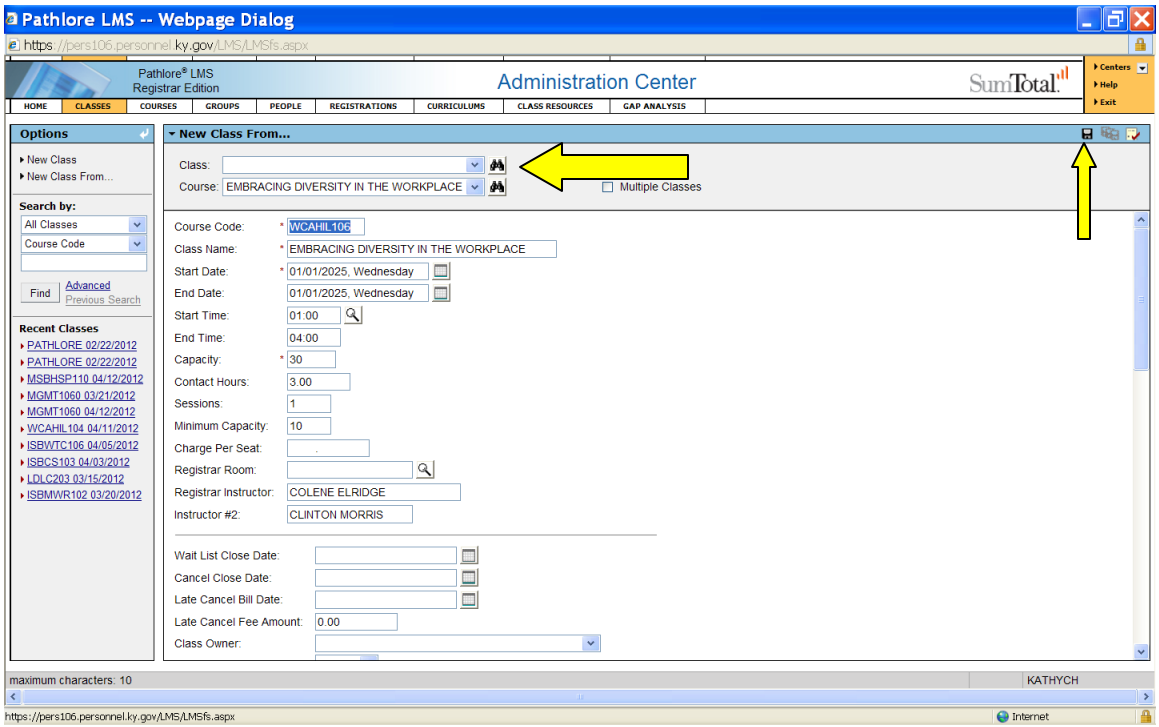
Enter the course code or class name that you are looking for, **or search** for the course code or class name by hitting the binoculars



If you hit the binoculars, you will get a screen that looks like this:



Type in the course code/class name you are looking for and **hit** the Find button. You can also search for the course code/class name by using part of the code/name and % as explained earlier in the manual.



After you have selected the correct course/class it will show the default on the screen.

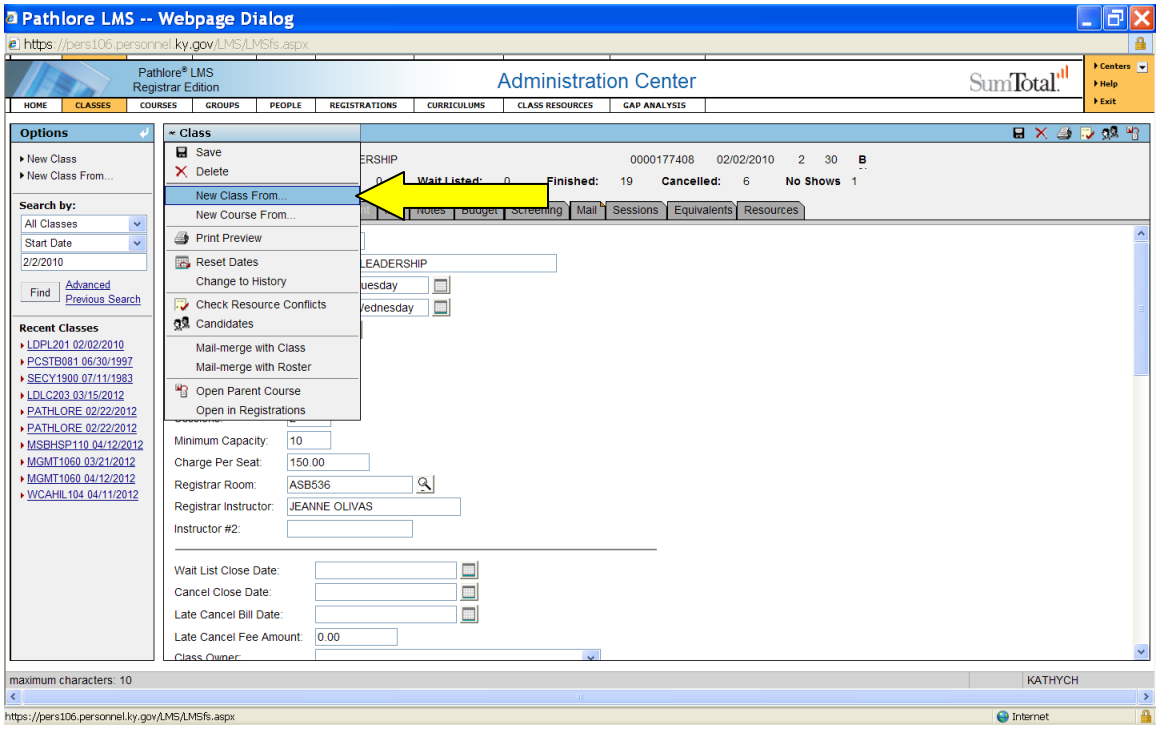
You will then go in and **change** the dates to reflect the dates that you want. You must then **mark the box** Reset Dates and hit the Save button.

Then go in and **add/change** any information necessary and **hit** the Save ( ) button again.

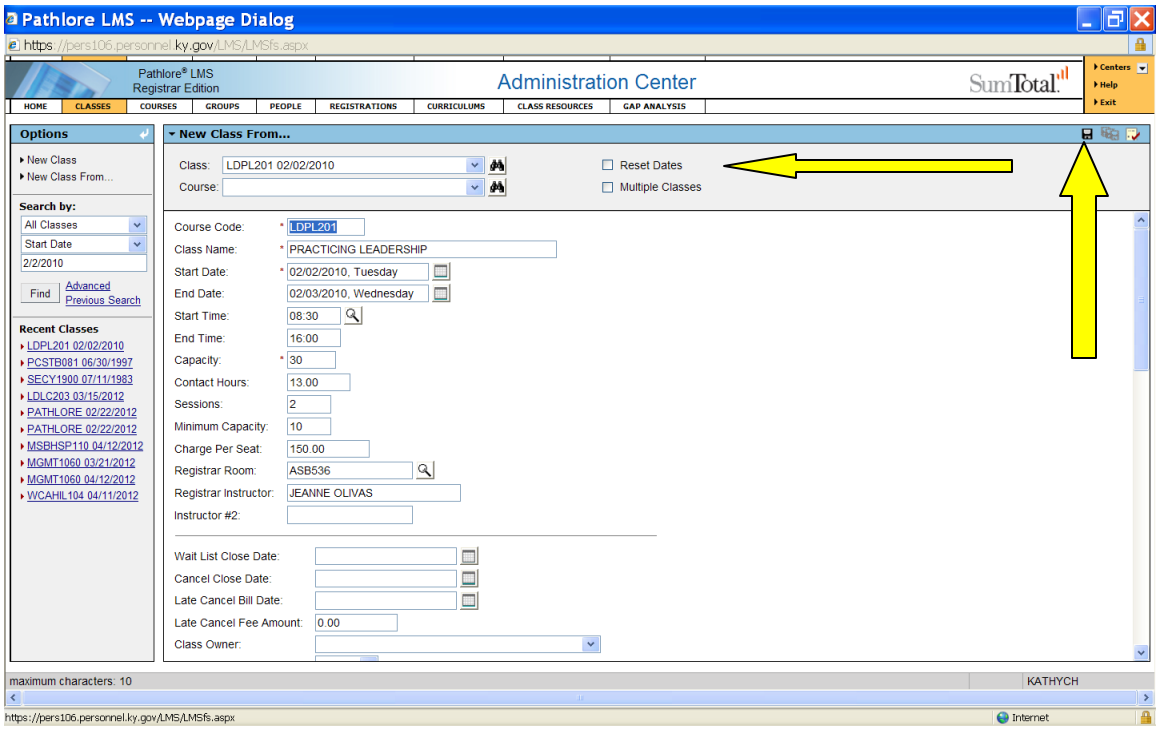
Your class should now be set up.

Create a Class from an Existing Class

From Class tab, **highlight** New Class From



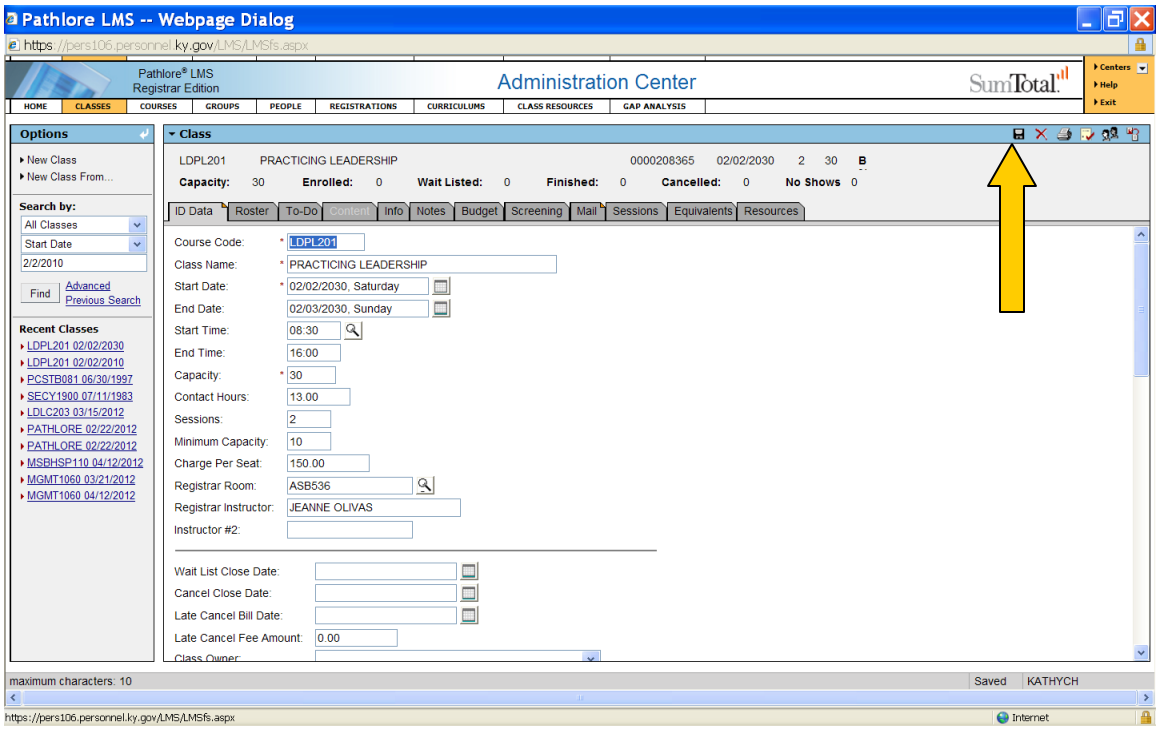
You will get the following screen, which is an exact replica of the class you were just on.



You will need to **reset** the dates of the class to create another class, otherwise you will just replicate the class that already existed. Just **enter** your new class dates and check the 'Reset Dates" box.

After you have changed the dates, **click** the Save (🖫) button.

Once you have **clicked** the Save button, you will just get the regular class screen.



Edit any other necessary information and **click** the Save (🖫) button again.

Your new class is now set up.

Frequently Asked Questions

Q. How do I enroll or wait list a participant for a class?
A. See *Registrations* section on page 54 of this manual.

Q. How do I obtain a person's transcript?
A. See "Obtaining transcripts" on page 44 of this manual.

Q. How do I email a person's transcript to them?
A. You cannot email a person's transcript to them, however you may print it out and send it to them (see section), or you may request a Crystal Report and have transcript emailed (see *Crystal Report Requests* section (p. 90) for more information).

Q. How do I remove a person from a class?
A. You probably do not have the ability to remove a person from a class, you should however be able to cancel them out of the class (it will still show on that person's transcript) or contact GSC to have them removed.

Q. Who do I contact with questions about how to use Pathlore?
A. Please contact Kathy Hutcherson at (502) 564-564-8170 ext. 247, kathy.hutcherson@ky.gov, or Jamille Smith at (502) 564-8170 ext. 238, Jamille.Smith@ky.gov for assistance with Pathlore LMS.

Q. How do I search for a class?
A. Please see the *Class Information* on page 14 of this manual.

Q. When I log on, I cannot see the Administration Center, the screen is just blank?
A. Make sure that your pop-up blocker is turned off or allow pop-ups from this site, because Pathlore LMS does use pop-up screens and will not function correctly if pop-up blocker is enabled. If you still experiencing problems, contact GSC for assistance.

Q. I don't have access to current employee(s) in my Cabinet or the employee(s) isn't listed in Pathlore?
A. If the employee is brand new to state government, they may not be in the Pathlore system yet. Imports are run at the end of each month in order to update Pathlore Information. If the employee is a contract employee, please see *"How to create a record for a contract employee"* on page 52 of this manual. The only time you should create a record for an employee is if they are a contract employee. All state employees will be updated/entered automatically on a monthly basis. If the person has just moved to your Cabinet from another

Cabinet, contact Jamille Smith or Kathy Hutcherson at GSC and they can change the Cabinet information to give you access. Please contact GSC if you have any questions.

Q. What is the difference between a class and a course?
A. A class is usually set up from a course. You will want to develop a course if you are going to have the same class over and over again. Setting up a course will save you time when go into set up a new class because the default information will be stored and you will only have to modify things like the date, or make any other class specific changes.

Q. What do I do if the liaison listing for my Cabinet has changed or needs to be updated?
A. Please contact Kathy Hutcherson at GSC at (502) 564-8170 ext. 247 or email updates/changes to kathy.hutcherson@ky.gov She will update your liaison information on the GSC website. All liaison changes in Pathlore will be made on a monthly basis. In order to change liaison information, GSC must have exclusive rights to the Pathlore LMS system. If you have any questions, please contact GSC.

Q. My people say they are not receiving confirmations for classes they are supposed to attend at GSC.
A. Please check to make sure the employee's email address is listed correctly in Pathlore. Pathlore uses the email listed to send email confirmations for class enrollment. If the email address listed is incorrect, please correct the information and save the record. If the employee still needs the email confirmation, please notify GSC and we can resend the confirmation.

Training Liaison Listing

The training liaison listing is maintained on the GSC website at the following link: http://personnel.ky.gov/NR/rdonlyres/BA584F31-0EF1-40C6-AA66-4411707DBC49/0/GSCTrainingLiaisons.pdf

In the event that information needs to be updated or corrected, please contact Kathy Hutcherson at (502) 564-8170 ext. 247 or by email at kathy.hutcherson@ky.gov

Contact Information

If you need additional assistance, or have Pathlore LMS questions, please contact either

Jamille Smith at Jamille.Smith@ky.gov
(502) 564-7455 ext. 238

or

Kathy Hutcherson at Kathy.Hutcherson@ky.gov
(502) 564-8170 ext. 247

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