We are upgrading the DLA Learning Management System (LMS) to take advantage of improvements in this “best in class” training software. These job aids will acquaint you with new features and terminology as well as provide you step-by-step instructions for performing the most commonly performed tasks in the LMS.

Click on the subject link below to go to the specific task.

Introduction to Learning Needs Management

Description

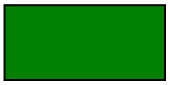
The purpose of this job aid is to provide an overview of the core terms and concepts that make up the DLA LMS Learning model.

Tasks

- Define DLA LMS Terminology
- Identify and Use System Glossary
- Overview of DLA LMS Learning Model

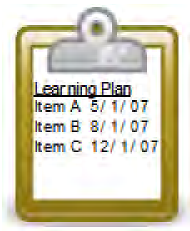
Define DLA LMS Terminology

User: Any person for whom a record has been created in the users section of the user management area for whom you wish to keep learning records and to register for courses. A user is anyone, with administrative access to the application, whose information has been recorded in the system. The system uses the user's information to restrict his/her access to the application. A user's privilege is comprised of one or more roles.



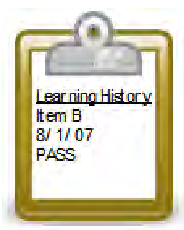
Item: Referred to as learning item, this is an assignable unit for which completion can be tracked and recorded. Items are usually learning-related such as a required course or training activity. Items can be web-based, instructor-led, or identified as required reading materials or videos.

Curriculum: A grouping of items and/or sub-curricula that allows you to more easily assign a given set of learning items to a user, and to track the completion and maintenance of required learning.

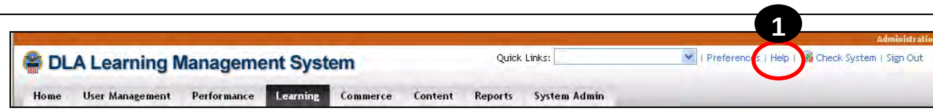


Learning Plan: The Learning Plan is a list of items that a user must complete, with respective target or deadline completion dates for each. To view the Learning Plan for any user, bring the user's information into view in the user's section, and click the To-Do List tab.

Learning Event: A user's completion or attempted completion of a Learning Item. For example, when users' attendance or participation in a Learning Item is recorded, a corresponding Learning Event is added to each user's learning history/Completed Work. Although most Learning Events relate to a specific Item, Learning Events can also be created for learning that does not relate to a Learning Item (External Events).



Learning History: A detailed list of all of the recorded Learning Events for auser.

Identify and Use Glossary		
1	The Glossary can be accessed by clicking the **Help** link on the top of the menu bar.	
2 3 4	Once in the help files, click **Glossary**. A list of terms displays. Click a term. The term definition displays.	

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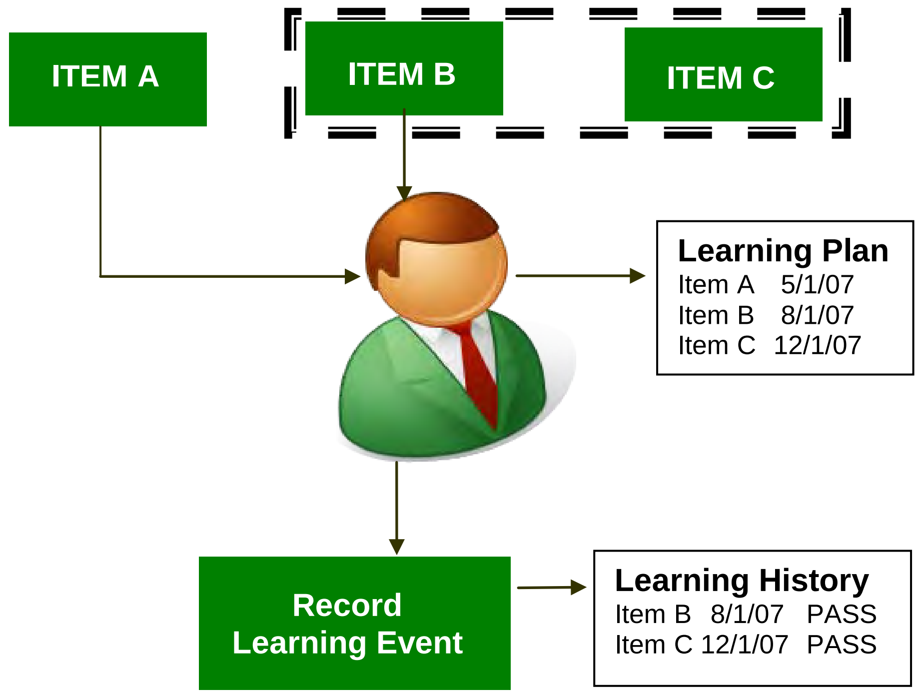
<table>
<tr><th colspan="3">Overview of the DLA LMS Learning Model</th></tr>
<tr><td></td><td>The Learning Needs Management Model is the foundation of the DLA LMS.</td><td>
</td></tr>
</table>

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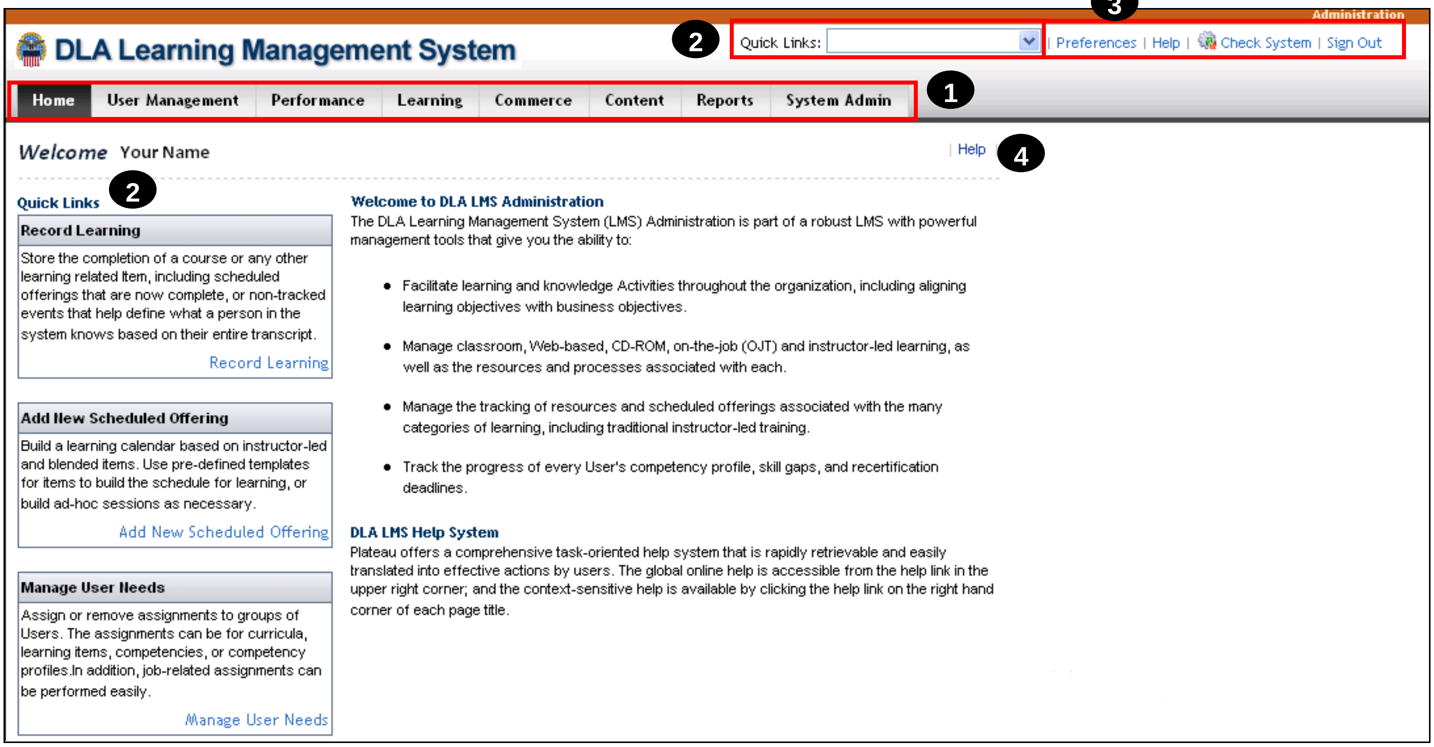
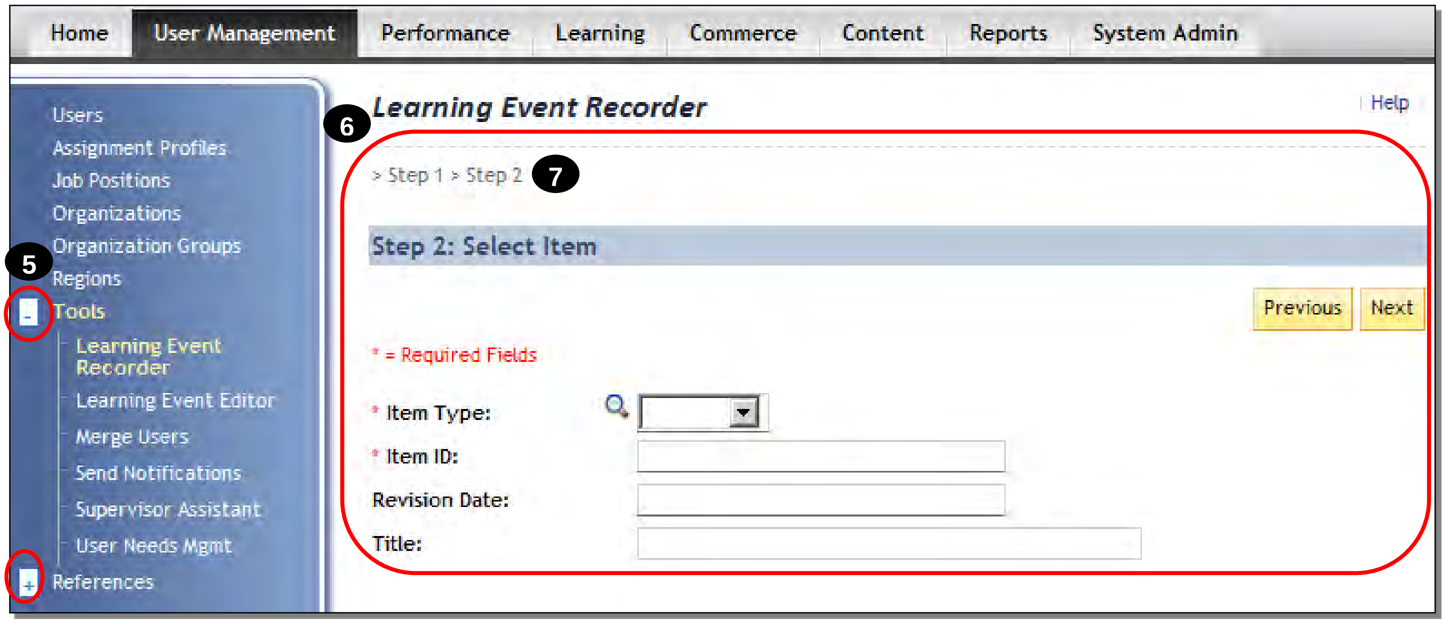
Identify Areas of the DLA LMS Interface



1	The top menu frame (main menu) contains links to the main functional areas in the administrator interface. When a top menu option is clicked, a left menu displays.
2	Quick Links provides quick access to commonly used functions in the DLA LMS. These same functions can be found on the first page of the DLA LMS upon logging in.
3	Preferences allows the admin to change his/her locale (language, date/time format, etc.) and time zone settings. Help opens the Online Help System with access to contents, index, and search. Note: Plateau is the vendor that provides the DLA LMS software. Check System is a tool in the interface that checks users' browsers for compatibility with the DLA LMS. It is called software check, and is available for both the individual DLA LMS user and administrator. Sign Out ends the current session.
4	Click the Help link to display context-sensitive help for the specific section currently open. This link differs from the Help link in the top menu frame, which launches the general help for the Online Help System.

Identify Areas of the DLA LMS Interface, Continued



5	Based on the top menu option selected a related set of menu options displays in the left menu. If a menu item has subsections within it a plus [+] is displayed next to the link. Clicking the [+] expands that menu option. The [+] will change to a minus [-]. Only one menu item can be expanded at a time.
6	When a left menu option is selected, the corresponding screen displays in the content frame. This is the working area where searches are conducted to retrieve, view, and edit records.
7	Breadcrumbs display at the top-left corner of the content frame and identify the area, section, subsection (if applicable), tab, and mode currently open. Breadcrumbs may contain active links that facilitate navigation to previous screens.

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Identify Commonly Used Navigation Icons	
Icon	**Description**
Search | Add New | Help	The **Add New** link can always be found in the top right corner of the content frame. This link allows the admin to create a new record.
More Options / Catalogs / Subject Areas Standard Options / Subject Areas / Evaluations	**Tabs** are used to access the labeled information. The **More Options** link displays all available tabs. Once clicked, the link changes to **Standard Options**.
Apply Changes	Click **Apply Changes** to save new or edited information in an existing database record.
Add	Click **Add** to save a new record into the database once an admin has completed all necessary fields.
Copy...	Once an admin has accessed a record in edit mode, click **Copy** to copy the existing record to a new unique ID.
Delete	Once an admin has accessed a record in edit mode, click **Delete** to delete the record from the DLA LMS.
add one or more from list	The **add one or more from list** link opens a search window; one or more search criteria can be entered to locate and retrieve the desired information.
Search | Add New | Help	The **Search** link opens a search page (more on how to use the search pages below).
Records per Page 25 Page: 1 2 3 4 5 «Previous Next» User ID / User Name HAARON / Aaron, Henry LYEABEL / Abel, Lyndsey E 5 / 10 / 25 / 50 / 500	The **Records per Page** list allows admins to set the number of search result records displayed on the screen at one time. This setting holds until the admin logs out of the session. This setting reverts to the system default upon next login.
Page 1 of 123. Go	An admin can navigate through search results using the **Page** feature. They can scroll through the search results page-by-page or jump to a specific results page.
Select All / Deselect All	On a search results page, an admin can use the **Select All / Deselect All** links to select all, or deselect all, results.
Show All	The **Show All** link displays all result records for the current search on one page.
	The **View Record** button accesses a record as read-only.
	The **Edit Record** button accesses a record and allows an admin to make updates.

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Searching

Description

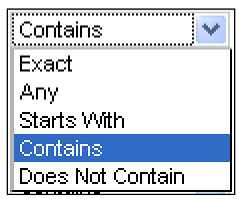
The purpose of this job aid is to guide you, the administrators, through the step-by-step process of performing simple and advanced searches for multiple record types within the DLA LMS.

Tasks

- Search Basics
- Create/Delete Search Filter
- Add/Remove Criterion from Search Filter
- Select from a List
- Save Your Individual Search
- Adjust Display of Search Results
- Sort Search Results

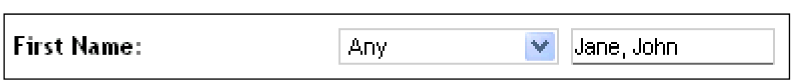
Search Basics

On each search page, you will most likely see the following terms in the drop-down menu associated with most entities.

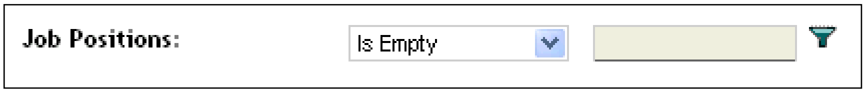


Exact: If you know the precise ID of the record, select **Exact** from the drop-down menu and click **Search**.

Any: Using the precise ID or description of the record, enter one or more criterion separated by a comma and click **Search**. For example, if searching for all user records containing the first name John or Jane, enter the exact first names separated by a comma, select **Any** from the drop-down menu and click **Search**.



Starts With: If you know the first part of an ID or description, select **Starts With** from the drop-down menu and type the first few letters or numbers of the record. The matching records display.

Search Basics, Continued		
	Contains: If you know any part of the record, select **Contains** from the drop-down menu to display the matching records.	
	Is Empty: Some entities will contain the term **Is Empty** in the drop-down menu. This selection returns all records where the specified field is empty. For example, if searching for all users without a job position, select **Is Empty** from the drop-down menu for the job positions criteria and click **Search**. 	
	You can also choose whether or not you want your search to be case sensitive by using the *Case Sensitive Search* option. The **Yes** button is selected by default which means that the system search is case sensitive. A non-case-sensitive search may take a little longer.	

Commonly Used Search Icons

Icon	Description
	The **Calendar** picker is associated with the date field. Use it to select and populate the corresponding date field.
	Click the **Create Filter** button to find and select a corresponding entity to include in your search filter.
	Click the **Clear Filter** button to clear the content of your corresponding search filter.
	Click the **Select from List** button to find and select a corresponding entity to include in your search criteria.
	Click the **Clear List** button to clear the list of filters of selected entities in your search filter.
	Click the **Search** button to select from a list or find and select the corresponding entity using a filter.

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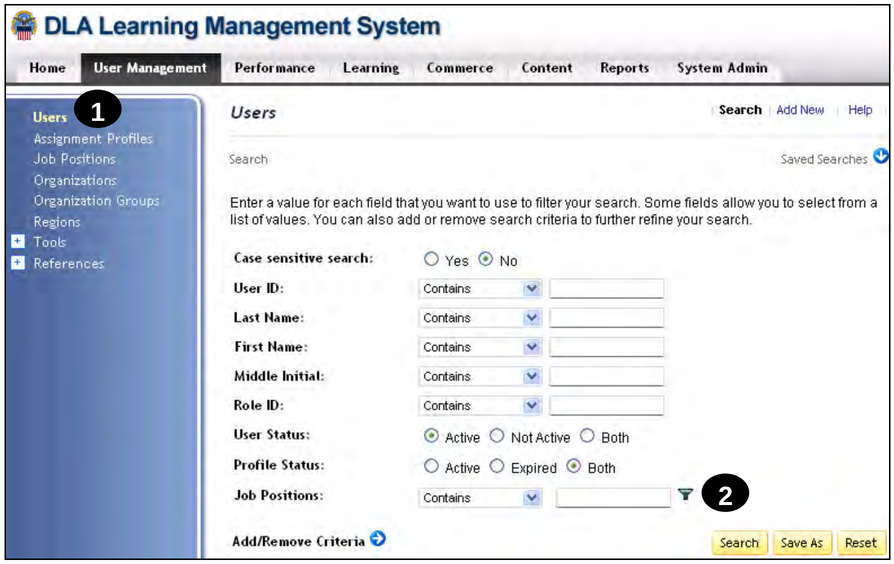
Create/Delete Search Filters

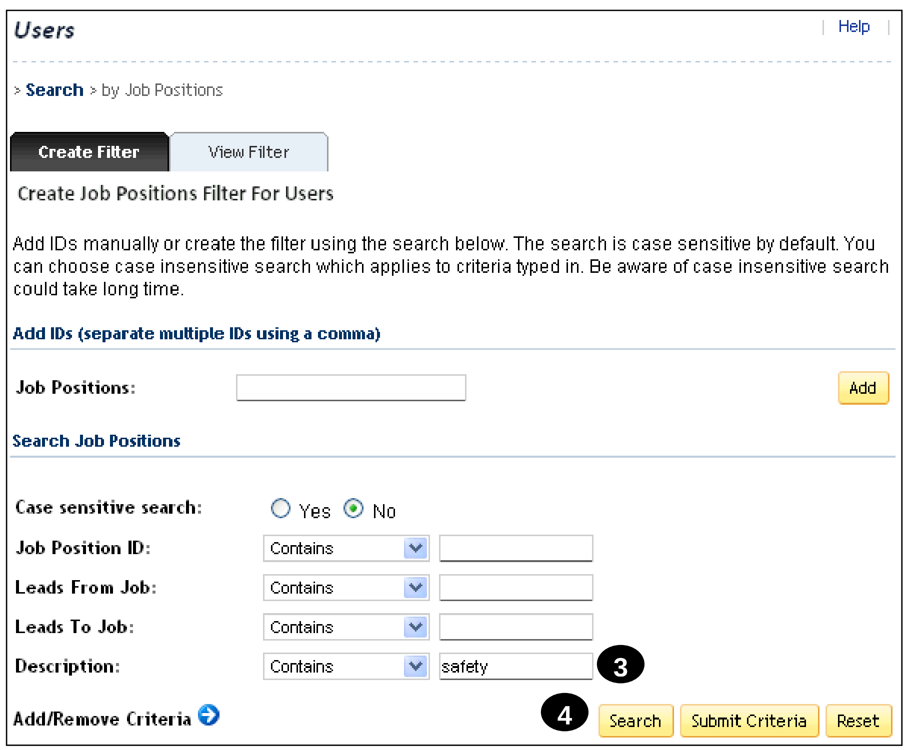
The search filter determines the contents of your result by listing only entities that satisfy all the criteria specified by your filter. For example, you may want to list only users that have a particular job position assigned. You need to specify the job position in a filter and apply that filter to search criteria to see only those users that relate to the selected job position.

1. Navigate to **User Management > Users**.
2. To create the filter, click the **Create Filter** icon for job positions.



3. If you don't know the job position ID exactly, search for it by entering criteria. In this example, let's search for job positions that contain the word *Safety* in the description.
4. Click **Search**.

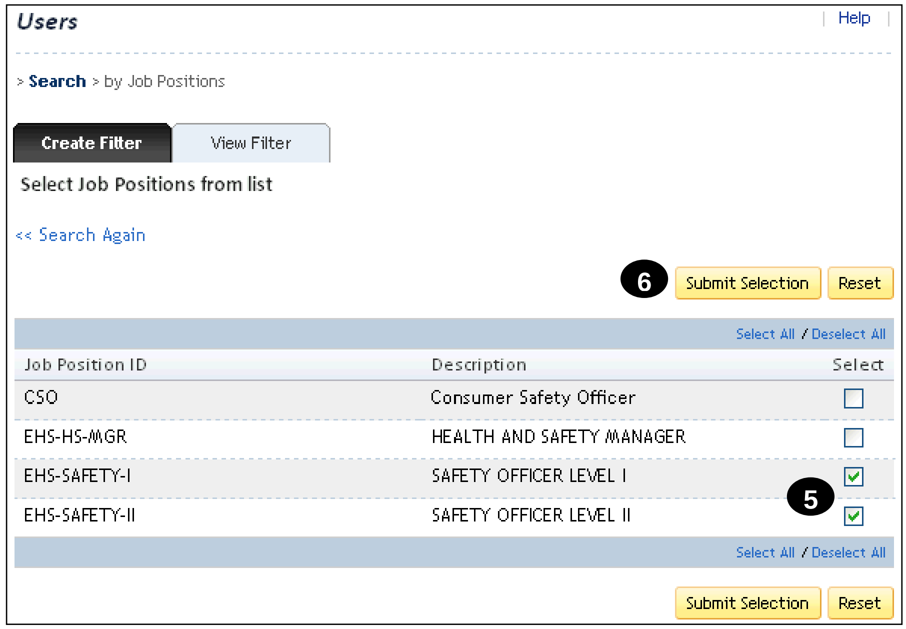
Note: Breadcrumbs appear in the top left corner indicating where you are in the search process.



Create/Delete Search Filters, Continued

5 Select one or more job position check boxes.

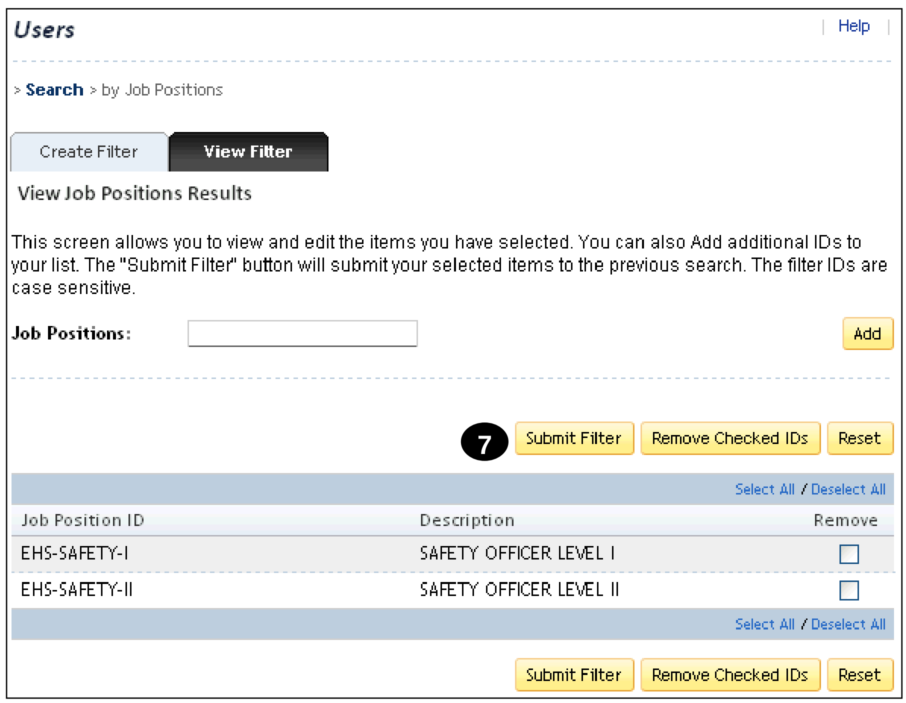
6 Click **Submit Selection**.



You are returned to the filter screen to view the filter just created.

Confirm your selection(s) are correct.

7 Click **Submit Filter**.



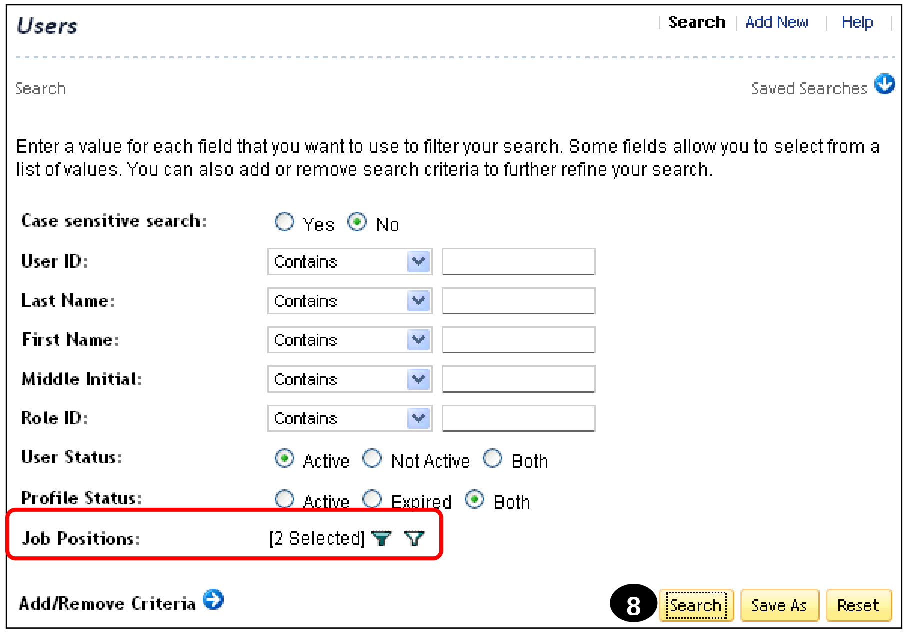
Create/Delete Search Filters, Continued

Once you have submitted your filter, you are returned to your original search screen.

You now see that the job position attribute has two (2) criteria selected for this filter.

You can modify this filter by clicking the **Filter by Criteria** icon, or you can clear the filter by clicking the **Clear Filter** icon.

8 Click **Search** to view results.



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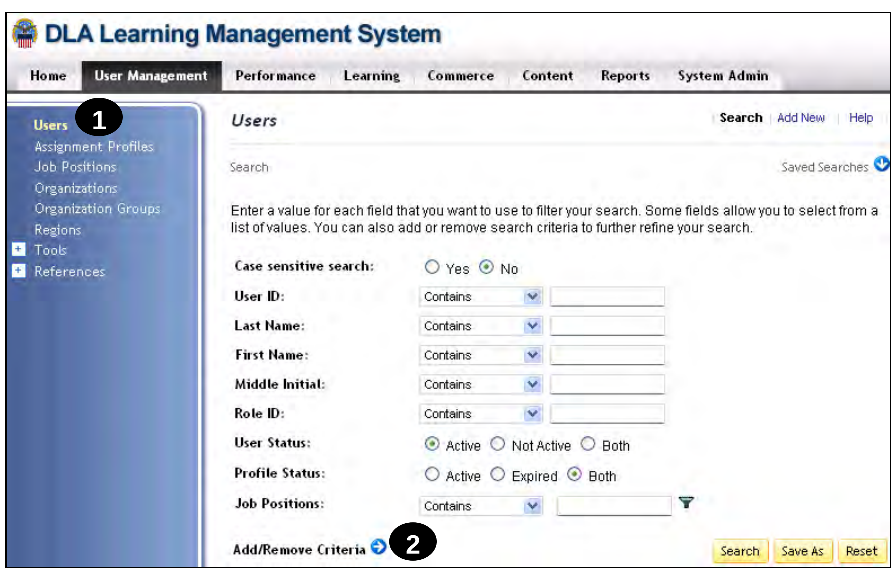
Add/Remove Criterion from Search Filter

Each entity in the DLA LMS has multiple attributes and you may find that some of the attributes are more useful than others in conducting searches. The DLA LMS gives you the choice to determine the attributes of the entity that you would like to use as criteria for your search.

Let's now search for all users within a specific organization.

1 Navigate to **User Management > Users**.

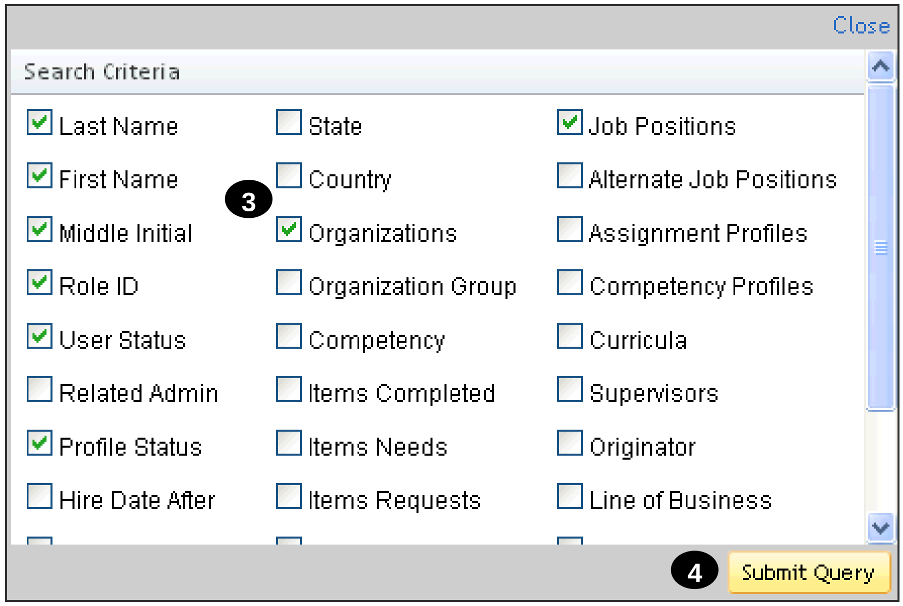
2 Click the **Add/Remove Criteria** icon.



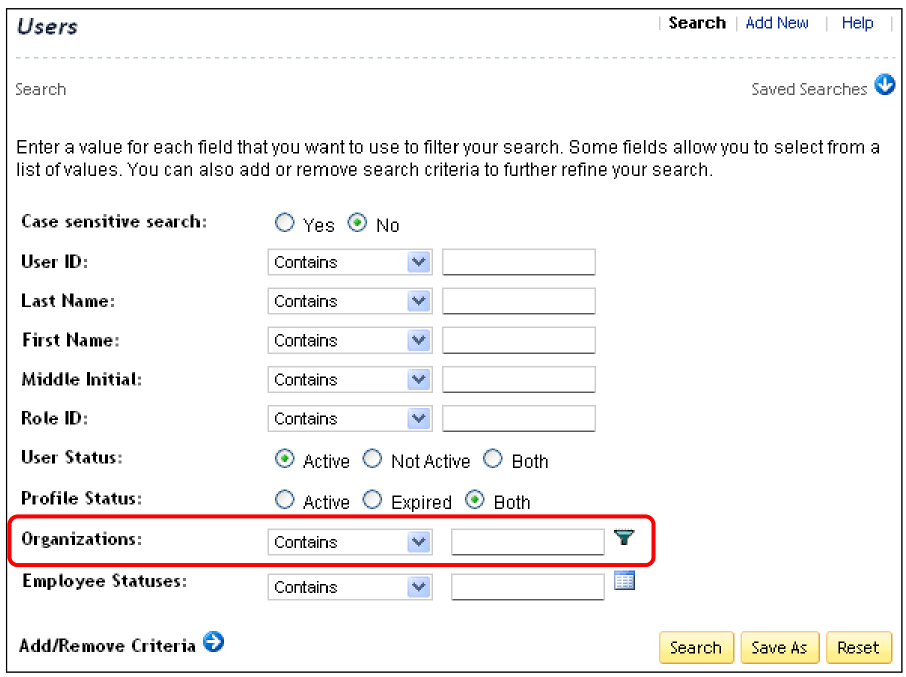
Add/Remove Criterion from Search Filter, Continued

3 Select the criteria check boxes to add to the search screen.

4 Click **Submit Query**.



The new criteria appear on the search screen.



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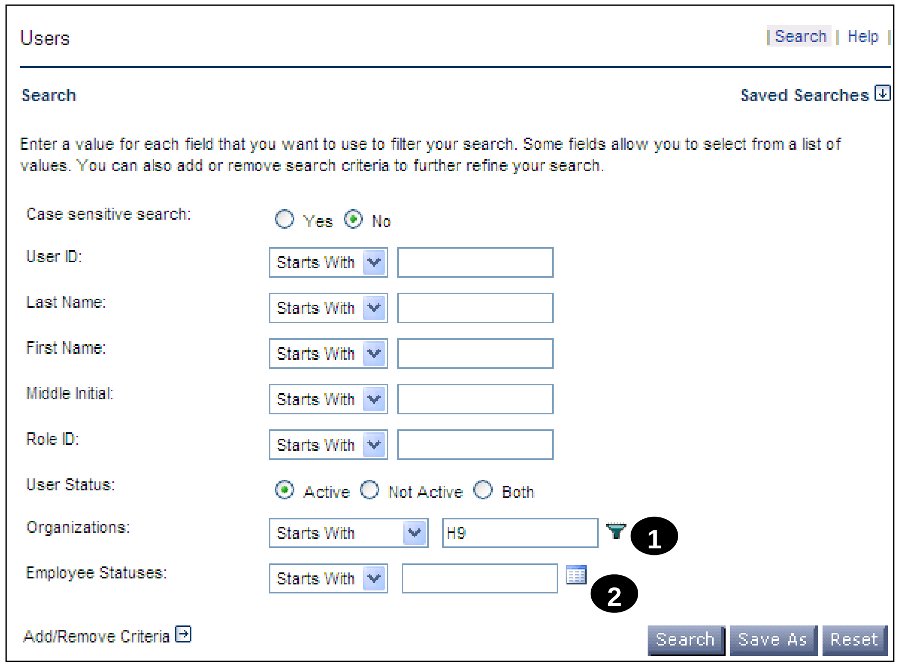
Select from a List

The DLA LMS has a number of reference lists that you can select from without creating and submitting a filter. Review the list, and check the objects you want to use in your search filter.

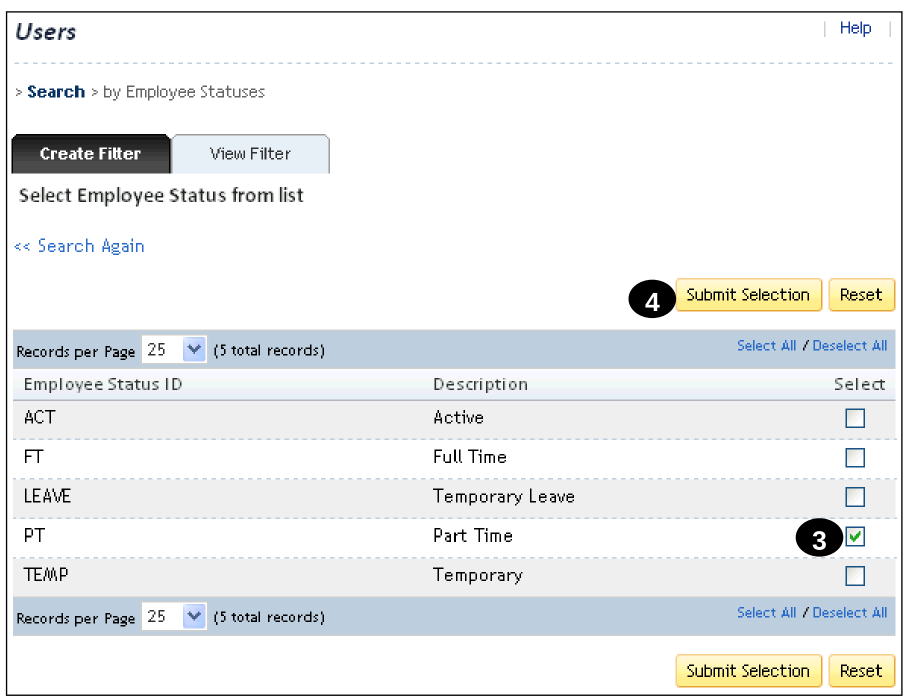
Let's continue to use our example of searching for users. We now want to search for users within the H9 organization, or an organization you have access to, who have an employee status of Exempt.

1. In the Organizations textbox, type **H9 or an organization you have access to.**
2. Next to the Employee Statuses field, click the **Select from List** icon.



You see a list from which you can select one or more objects to populate the related field.

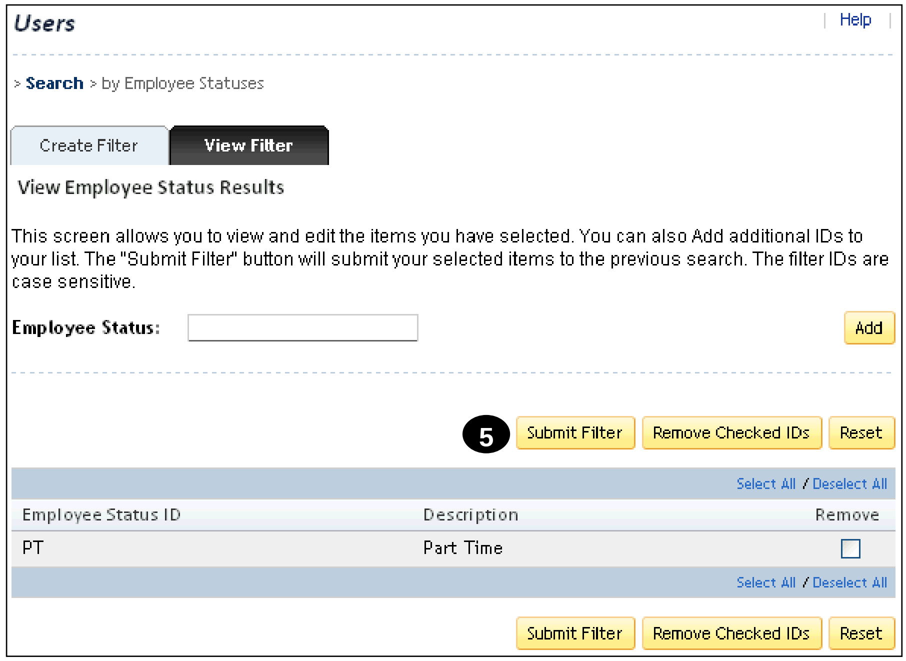
3. Select the check box(es) for the record(s) to be selected.
4. Click **Submit Selection**.



Select from a List, Continued

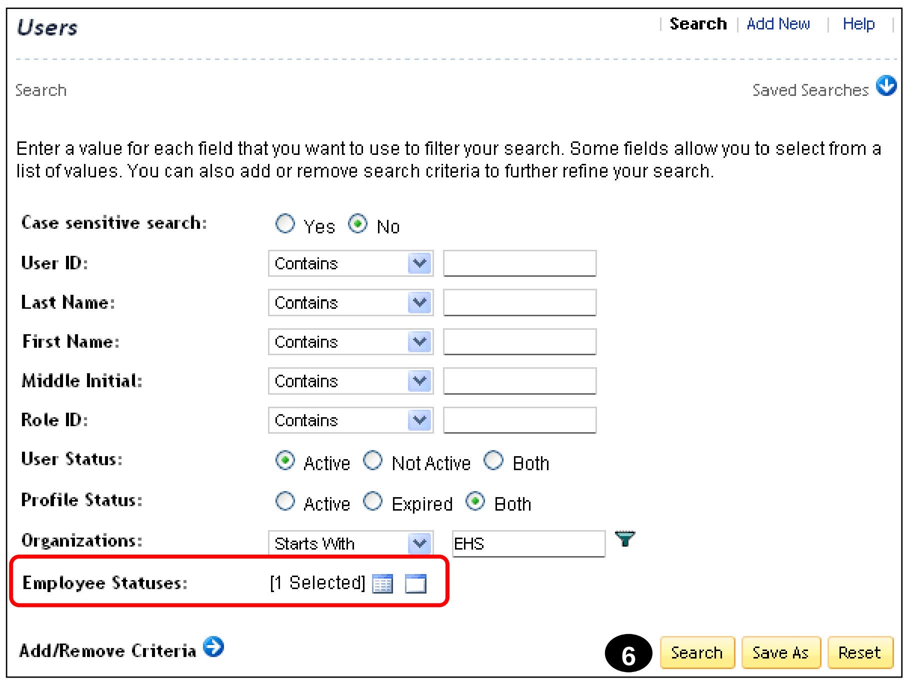
The selection has been added to the search filter. Review the filter for accuracy.

5 Click **Submit Filter** to continue.



6 Now that a criterion is selected, click **Search** to view results.

Note: To clear the list of selected entities, click the **Clear List** icon .



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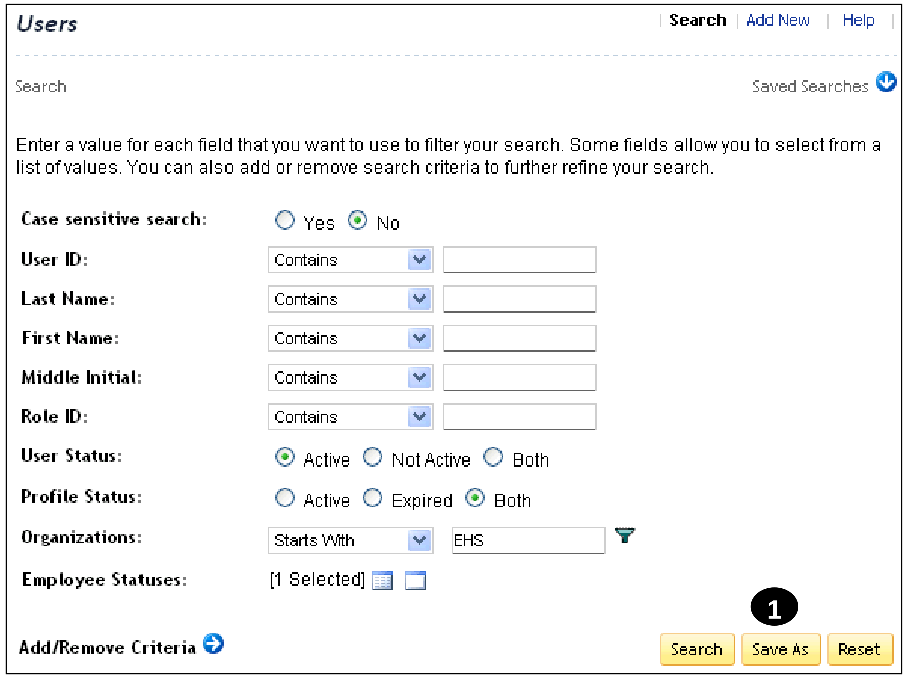
Save Your Individual Search

You can save a search filter and reuse the criteria specified in the search later. The search filter is individual-based and available only to your login.

1 Click **Save As** once the search criteria have been defined.

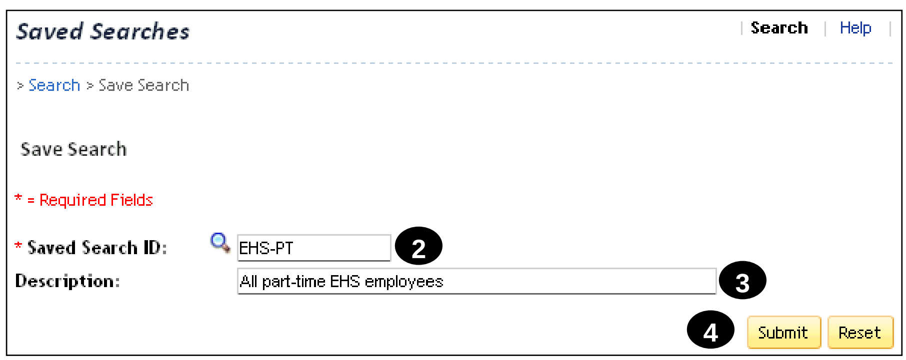


The system prompts you for an ID for your saved search and a brief description of the search.

2 Enter an ID in the Saved Search ID textbox.

3 Enter an intuitive description in the Description textbox.

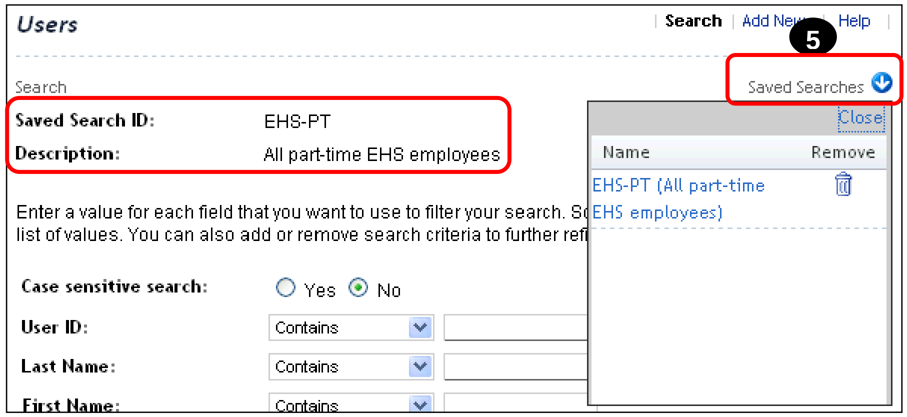
4 Click **Submit**.



Save Your Individual Search, Continued

5 Next time you want to use this exact search, click the **Saved Searches** icon on the search page and select the search name you wish to conduct.

Note: If you select a saved search, the search ID and description appear at the top of the page.



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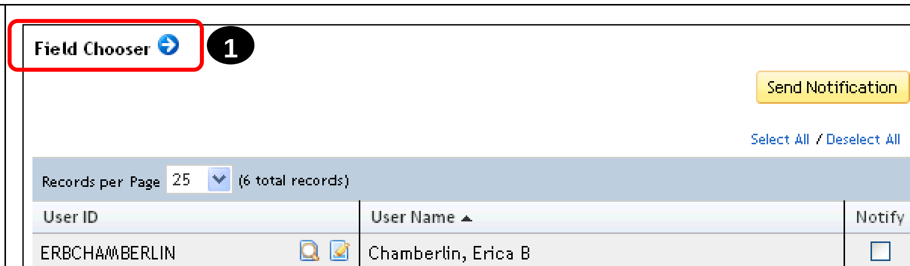
Adjust the Display of Search Results

Your search result is the set of related entities that fit the search criteria you specified. You may, however, choose to review the results by specific fields not based on all of the attributes of the search result.

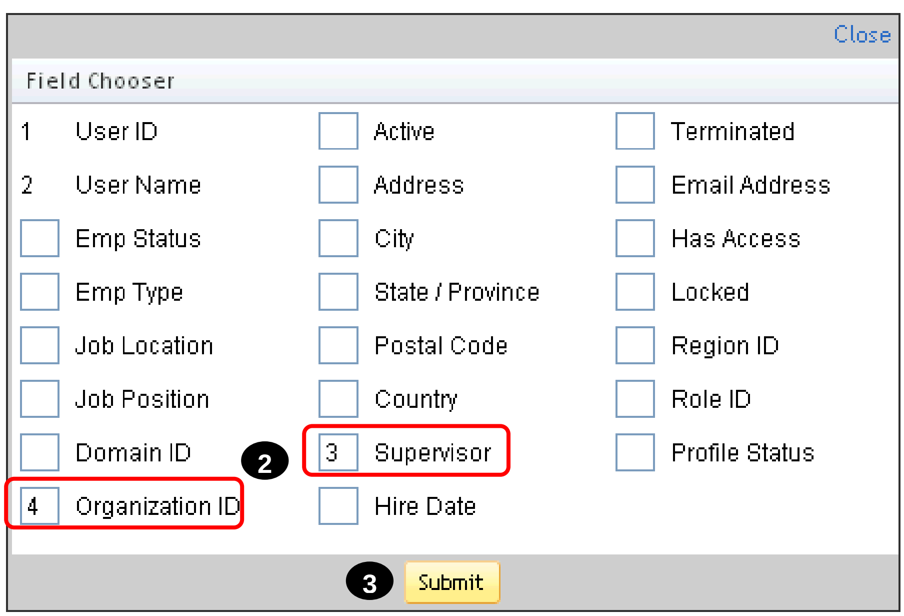
1 Click the **Field Chooser** icon above the search results list to determine which attributes of the listed entities that you want and in which column.



2 Select the attribute(s) that you want to display. In this example, let's show the supervisor in the third column and the organization ID field in the fourth column.

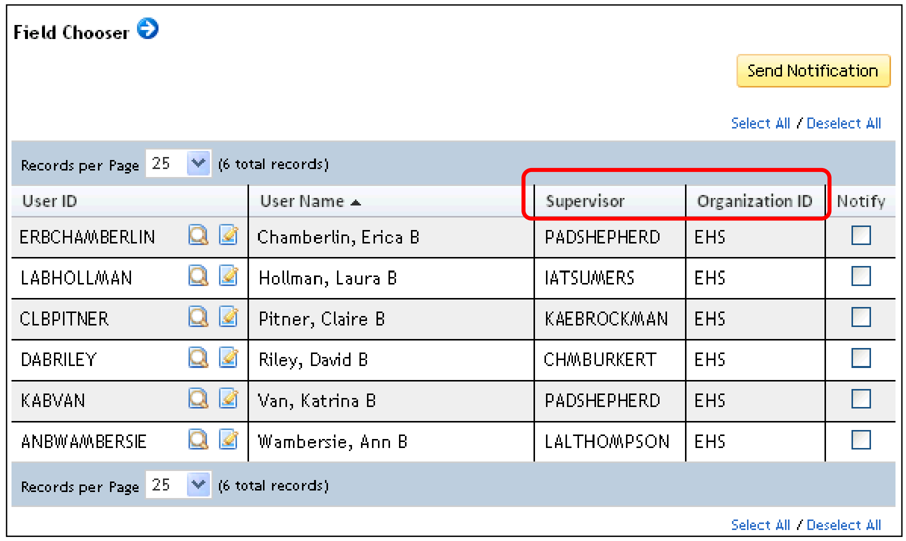
3 Click **Submit**.

Note: The column number is sequential (i.e., 1, 2, 3).



Adjust the Display of Search Results, Continued

View the new fields added to the search results.



Field Chooser

Send Notification

Select All / Deselect All

Records per Page 25 (6 total records)

User ID	User Name ▲	Supervisor	Organization ID	Notify
ERBCHAMBERLIN	Chamberlin, Erica B	PADSHEPHERD	EHS	☐
LABHOLLMAN	Hollman, Laura B	IATSUMERS	EHS	☐
CLBPITNER	Pitner, Claire B	KAEBROCKMAN	EHS	☐
DABRILEY	Riley, David B	CHMBURKERT	EHS	☐
KABVAN	Van, Katrina B	PADSHEPHERD	EHS	☐
ANBWAMBERSIE	Wambersie, Ann B	LALTHOMPSON	EHS	☐

Records per Page 25 (6 total records)

Select All / Deselect All

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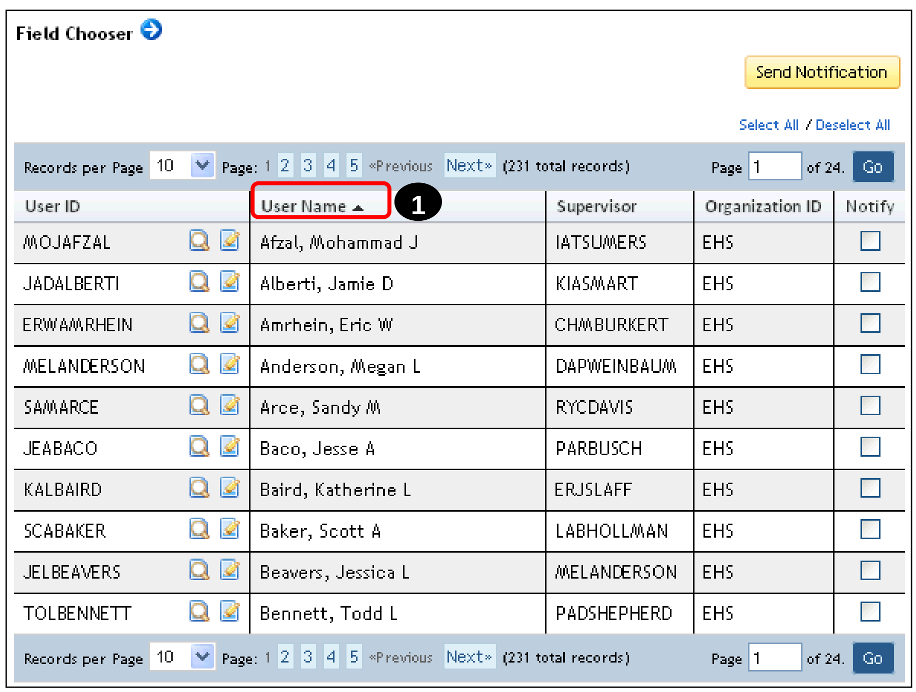
Sort Search Results

Once you have the results you are looking for, you can sort it based on key columns on your list (except the Description column/field).

1 To sort the list by an entity, simply find the column and click the header: an up arrow head indicates ascending order, A > Z; and a down arrow head indicates descending order, Z > A.



Field Chooser

Send Notification

Select All / Deselect All

Records per Page 10 Page: 1 2 3 4 5 «Previous Next» (231 total records) Page 1 of 24. Go

User ID	User Name ▲	Supervisor	Organization ID	Notify
MOJAFZAL	Afzal, Mohammad J	IATSUMERS	EHS	☐
JADALBERTI	Alberti, Jamie D	KIASMART	EHS	☐
ERWAMRHEIN	Amrhein, Eric W	CHMBURKERT	EHS	☐
MELANDERSON	Anderson, Megan L	DAPWEINBAUM	EHS	☐
SAMARCE	Arce, Sandy M	RYCDAVIS	EHS	☐
JEABACO	Baco, Jesse A	PARBUSCH	EHS	☐
KALBAIRD	Baird, Katherine L	ERJSLAFF	EHS	☐
SCABAKER	Baker, Scott A	LABHOLLMAN	EHS	☐
JELBEAVERS	Beavers, Jessica L	MELANDERSON	EHS	☐
TOLBENNETT	Bennett, Todd L	PADSHEPHERD	EHS	☐

Records per Page 10 Page: 1 2 3 4 5 «Previous Next» (231 total records) Page 1 of 24. Go

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Run Reports: Basic Tasks

Description

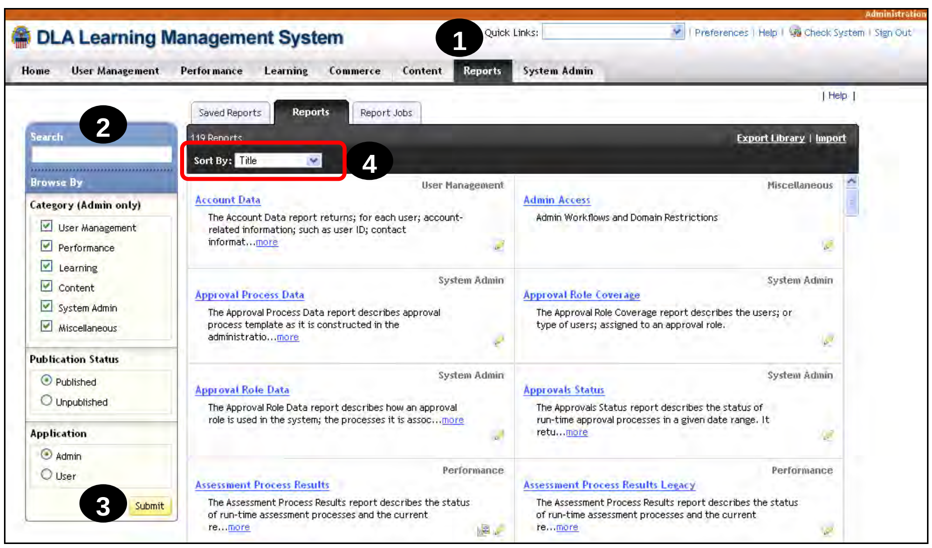
The purpose of this job aid is to guide administrators through the step-by-step process of using the basic tasks to work with reports in the DLA LMS.

Tasks

- Access and Search for Reports
- Run a Report
- Schedule a Report
- Save a Report

Access and Search for Reports

1. Navigate to **Reports**.
2. Use the Search and Browse By features to filter the reports list.
3. Click **Submit**.
4. Click **Sort By** to sort the reports list by Title or by Category.



Access and Search for Reports, Continued

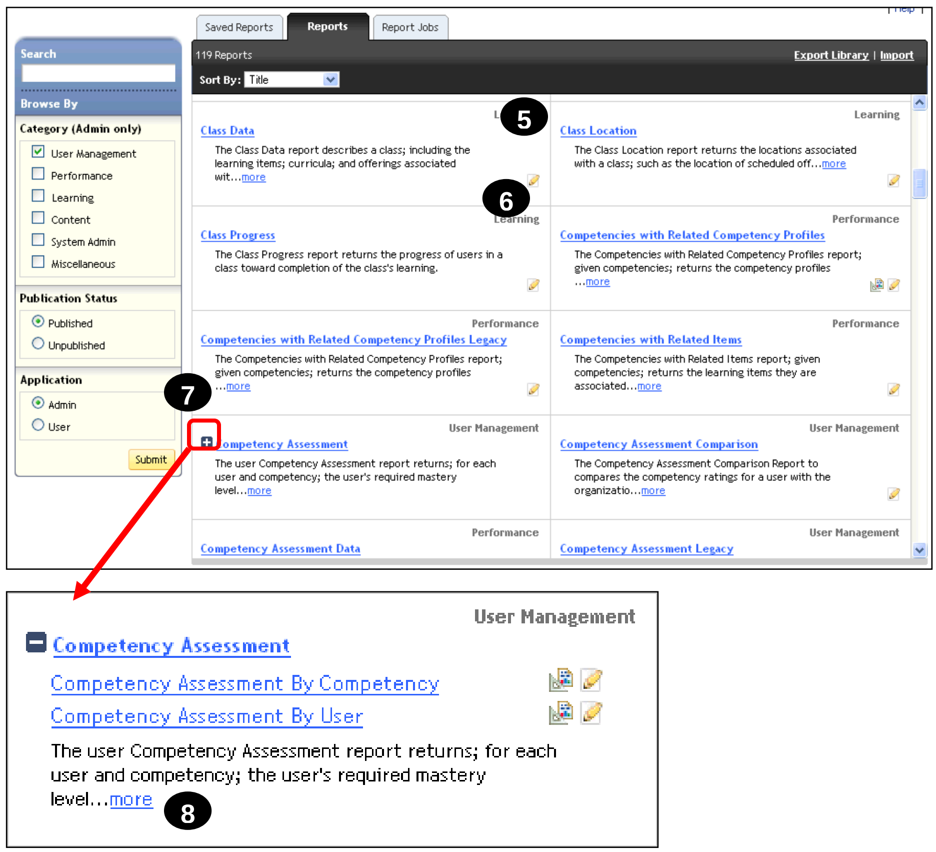
Click:

5 • : **Edit icon** to edit the report details, i.e., description, comments, domain.

6 • : **Export icon** to export the report as a zip file.

7 • : **Expand icon** to expand the list of available reports in the report group.

8 Click **more** to see additional report description.



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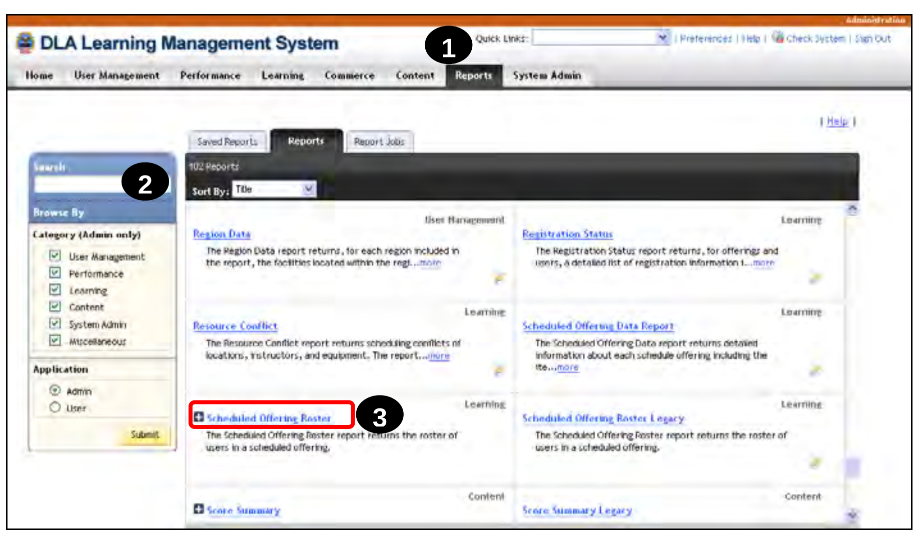
Run a Report

1 Navigate to **Reports**.

2 Use the Search and Browse By features to filter the reports list.

Locate the report you want to run. In this case, let's run the **Scheduled Offering Roster** report.

3 Click the report title link.



Run a Report, Continued

4 Modify the report title if necessary.

5 Enter a report header and footer to add to the report.

6 Select a report destination from the drop-down menu.

7 Select a report format from the drop-down menu.

8 Click the **filter icon** to search for and select the scheduled offering to run this report.

9 Click to mask or unmask user IDs on the report.

10 Click:

- **Run Report** to run the report immediately.
- **Schedule Job** to schedule the report to run as a background job, once at a future date, or on a recurring basis.

Note: Only published reports display the **Schedule Job** button.

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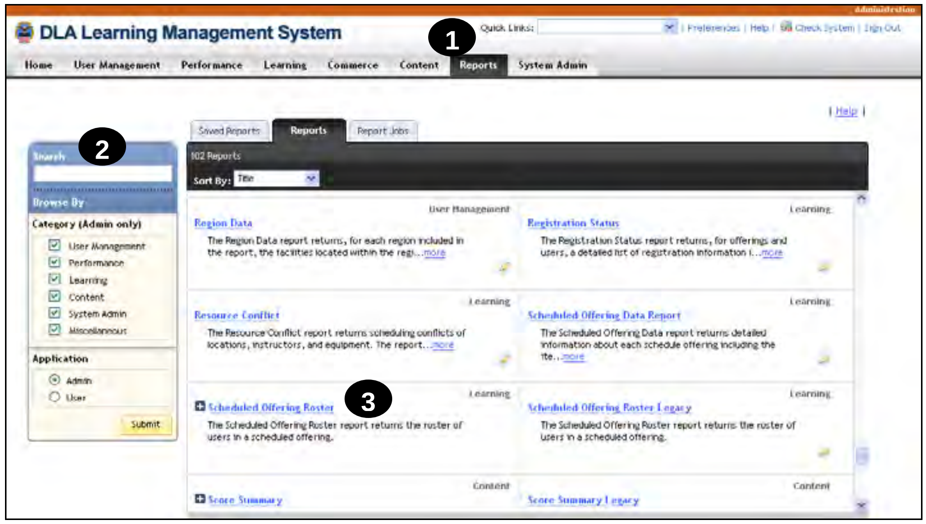
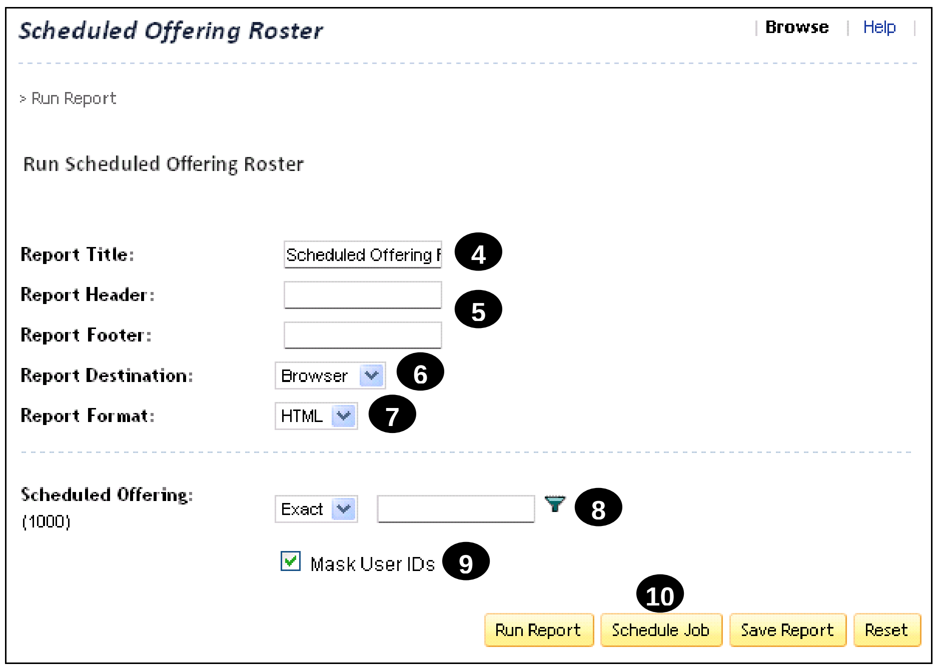
Schedule a Report

1	Navigate to **Reports**.	
2	Use the Search and Browse By features to filter the reports list. Locate the report you want to schedule. In this case, let's schedule the **Scheduled Offering Roster** report.	
3	Click the report title link.	
4	Modify the report title if necessary.	
5	Enter a report header and footer to add to the report.	
6	Select a report destination from the drop-down menu.	
7	Select a report format from the drop-down menu.	
8	Click the **filter icon** to search for and select the scheduled offering to run this report.	
9	Click to mask or unmask user IDs on the report.	
10	Click **Schedule Job**.	

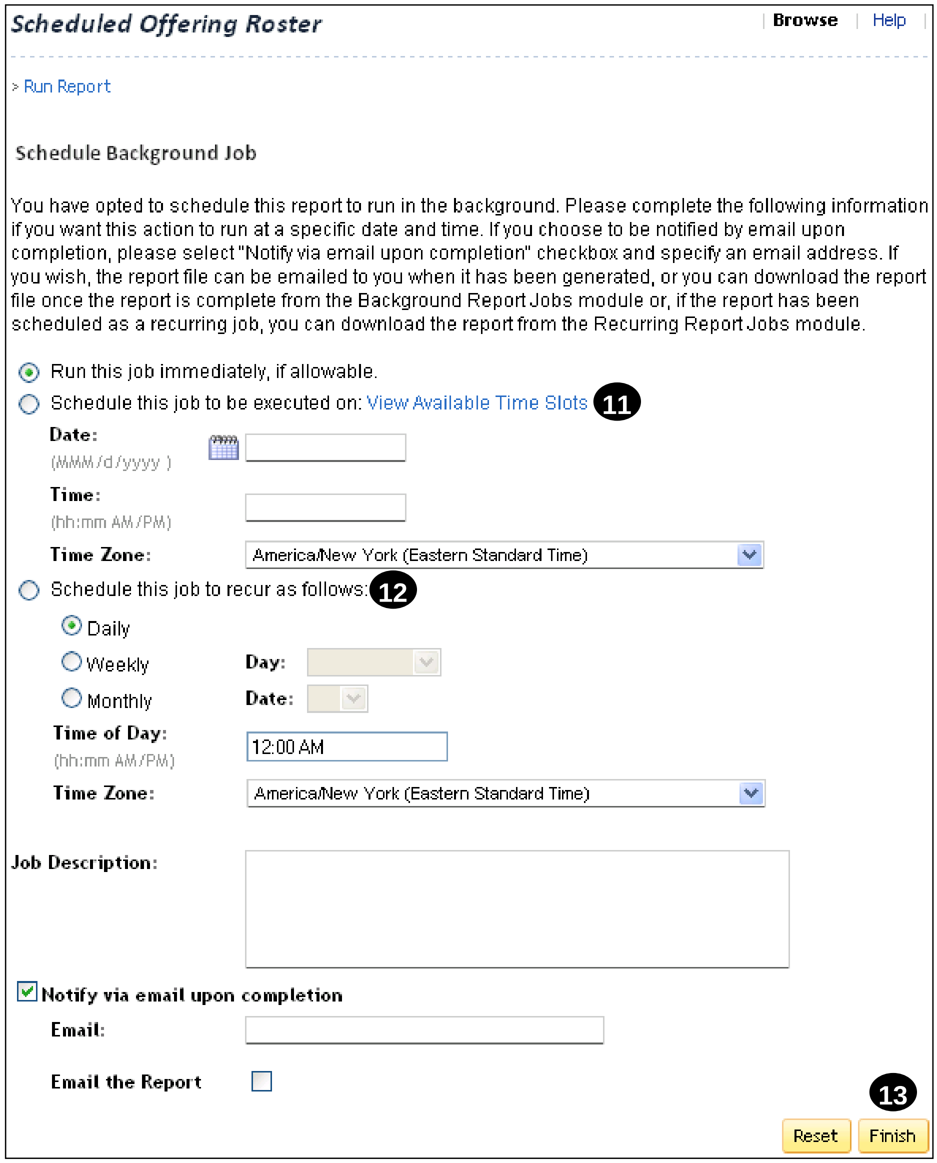
Schedule a Report, Continued

11 Click the **Schedule this job to be executed on** radio button to schedule the report to run on a specific date and time.

Note: Click **View Available Time Slots** to see a list of times you are allowed to run the report.

12 Click the **Schedule this job to recur as follows** radio button to schedule the report to run at the specified recurring basis.

13 Click **Finish**.



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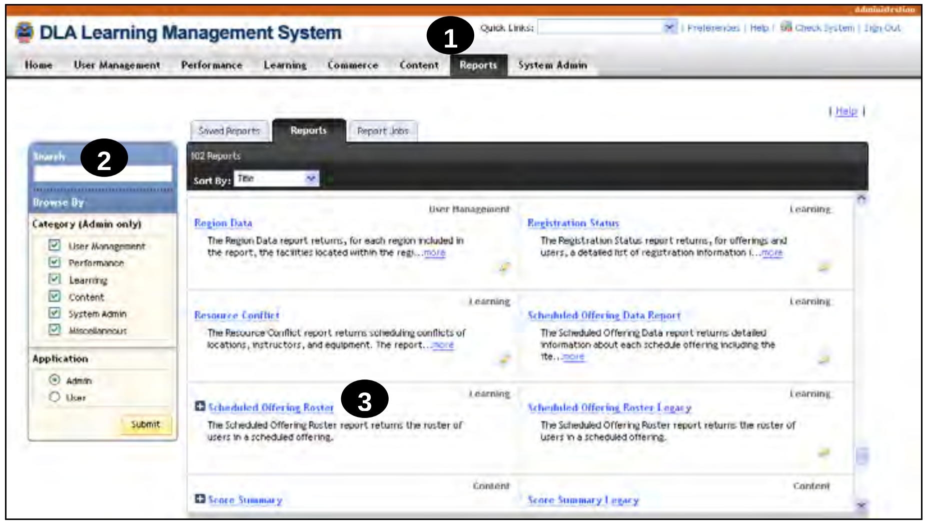
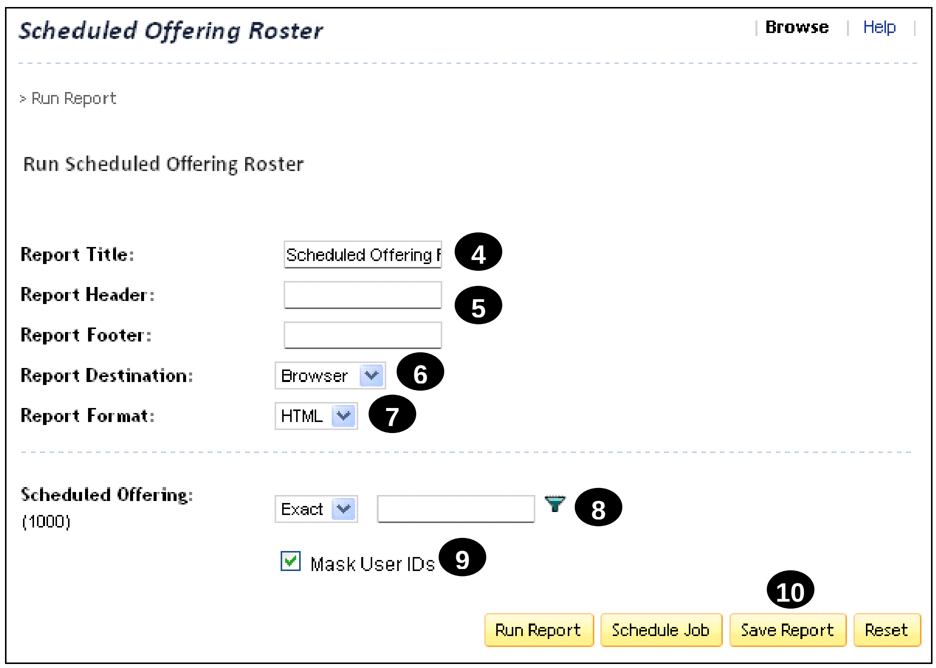
Save a Report

1. Navigate to **Reports**.
2. Use the Search and Browse By features to filter the reports list.

   Locate the report you want to save. In this case, let's save **Scheduled Offering Roster** report.
3. Click the report title link.



4. Modify the report title if necessary.
5. Enter a report header and footer to add to the report.
6. Select a report destination from the drop-down menu.
7. Select a report format from the drop-down menu.
8. Click the **filter icon** to search for and select the scheduled offering to run this report.
9. Click to mask or unmask user IDs on the report.
10. Click **Save Report**.

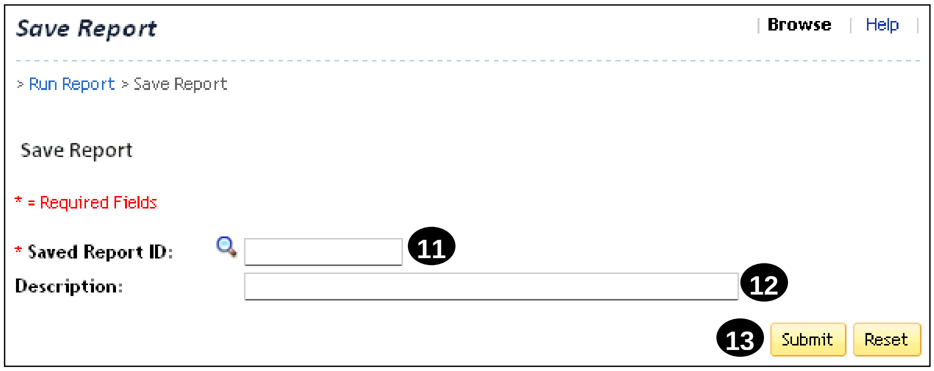


<table>
<tr><th colspan="3">Save a Report, Continued</th></tr>
<tr>
<td>11

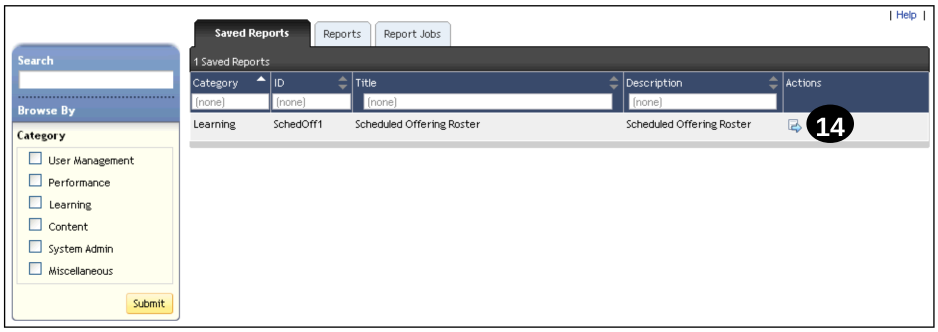
12

13</td>
<td>Enter an ID for the saved report.

Enter a description of the saved report.

Click Submit.</td>
<td>
</td>
</tr>
<tr>
<td>

14</td>
<td>The saved report displays on the Saved Reports tab.

To run a saved report, click the Run icon in the Actions column.</td>
<td>
</td>
</tr>
</table>

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Create Scheduled Offering

Description

The purpose of this job aid is to guide DLA LMS administrators through the step-by-step process of creating and editing a scheduled offering. Related terminology is provided.

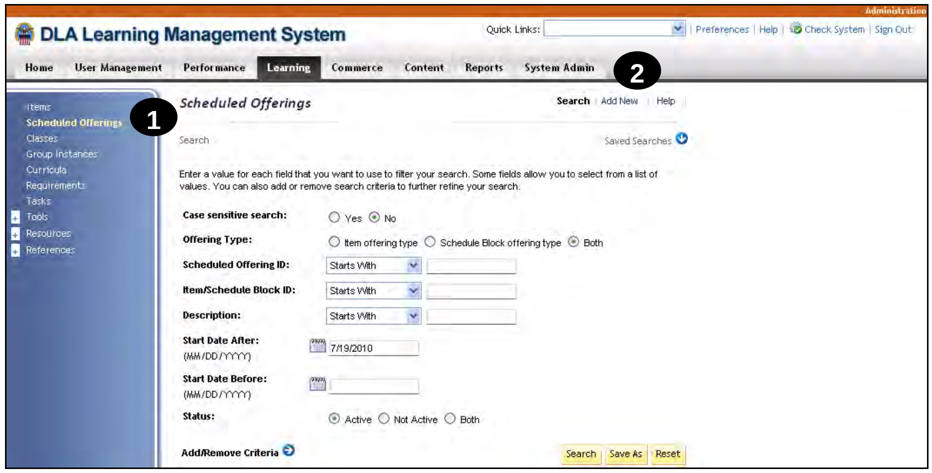
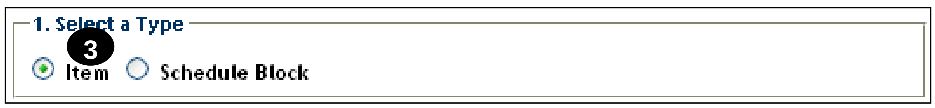
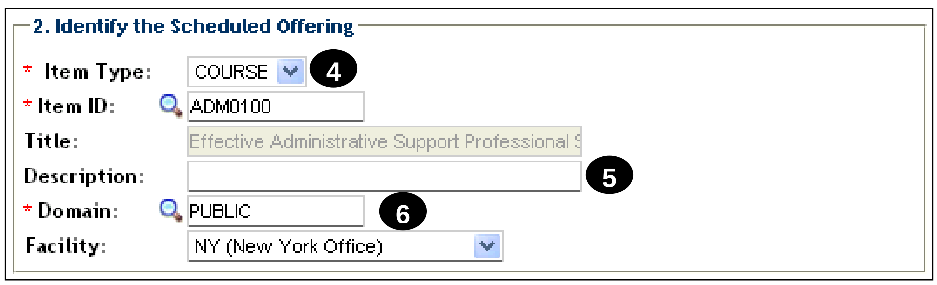
Tasks

- Create Scheduled Offering
- Add Additional Segments
- Add Additional Resources
- Copy Scheduled Offering
- Edit Scheduled Offering Notifications

Terminology:

Scheduled Offering: A scheduled offering is an item or activity scheduled for delivery on a specific date and time.

Segment: Unit of division of an item offering based on duration that facilitates variable resource scheduling.

Create Scheduled Offering		
1	Navigate to **Learning > Scheduled Offerings**.	
2	Click the **Add New** link. The Scheduled Offering wizard displays.	
3	Select the **Item** type option.	
4	Use the **search icon** to search for and select an item (by default the **Item Type** and **Item Title** fields will be populated once an item is selected).	
5	Enter a description of the scheduled offering.	
6	Specify the appropriate **Domain** and **Facility**.	

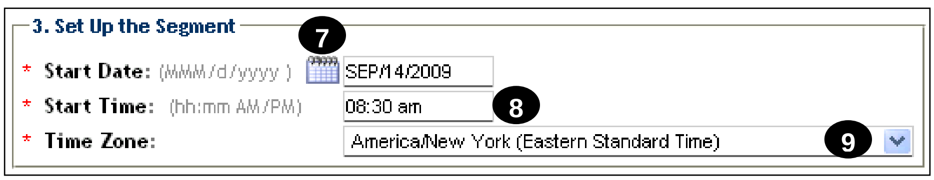
Create Scheduled Offering, Continued

View the calendar. The facility's holidays and non-working days are blocked out.

7 Click the **calendar icon** to select a start date.

8 Enter a start time.

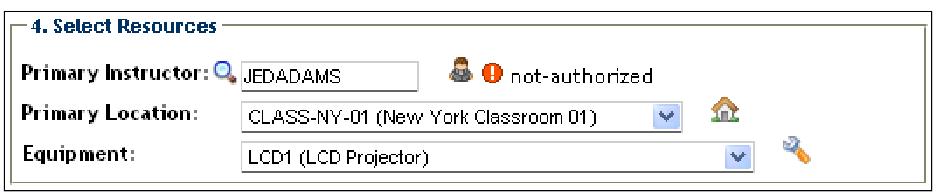
9 Change the time zone of delivery, if necessary.



Note: Enter the start time in the format displayed (i.e., hh:mm AM/PM) on your specific system.

Select **Resources**, including instructor, location, and equipment.

Note: If the scheduled offering is delivered via VLS, select the VLS server and enter the password.

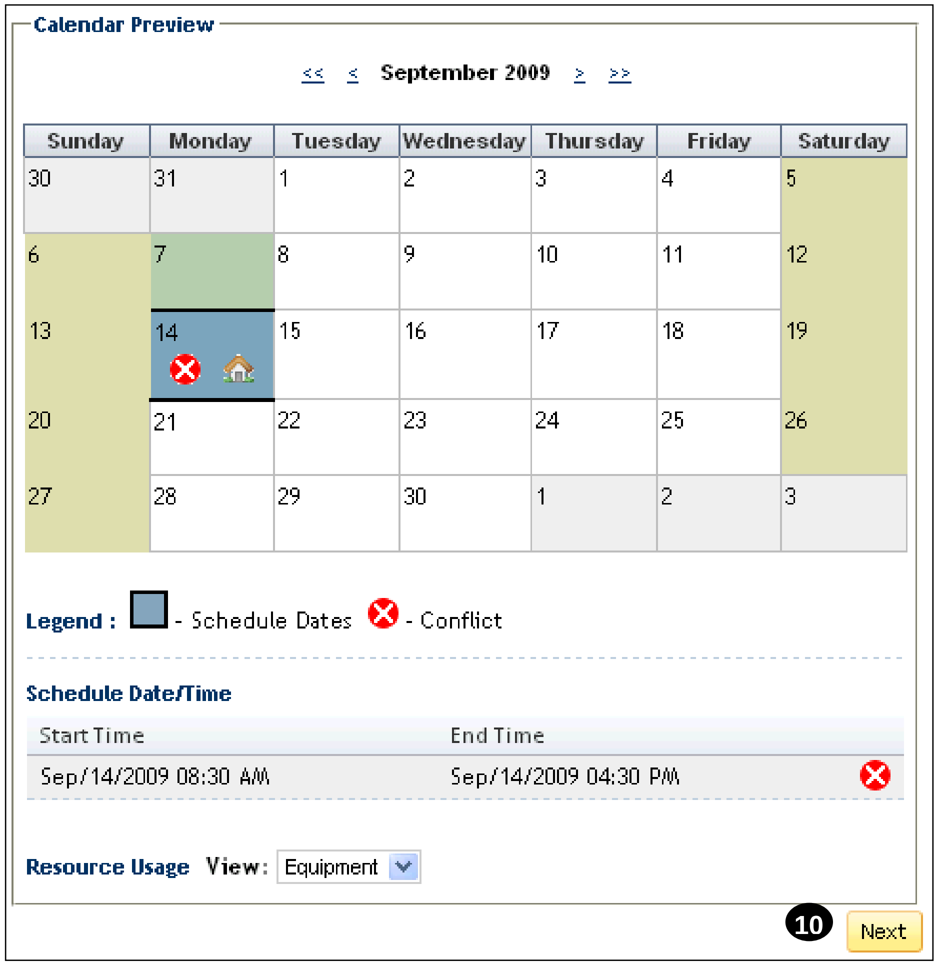


Create Scheduled Offering, Continued

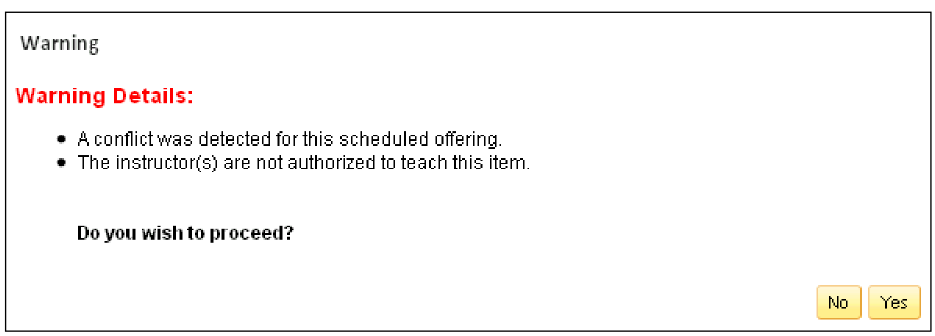
View the calendar again. The facility's holidays and non-working days are blocked out.

Note: Resource icons illustrate other dates when resources are already allocated. Conflicts are denoted with a conflict icon.

10 Click **Next**.



If there are conflicts, a warning message displays. Click **No** to go back to resolve the issue, or click **Yes** to continue.

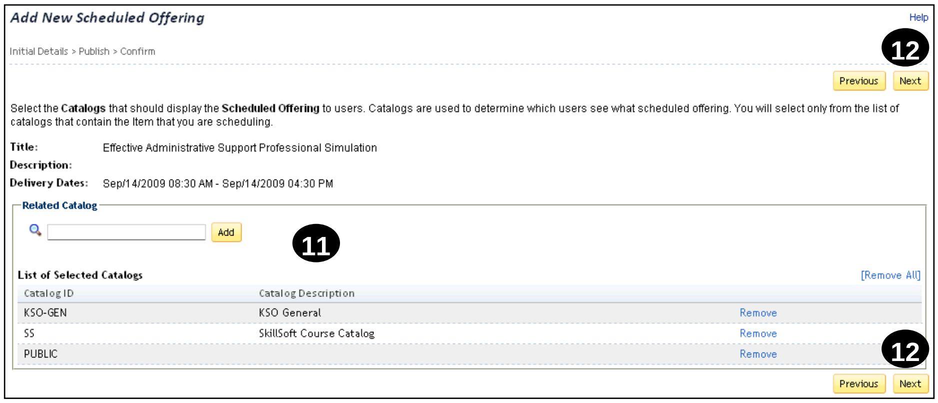


Create Scheduled Offering, Continued

11 Add the scheduled offering to a related catalog by clicking the **search icon** to search and select a catalog.

If the item resides in a catalog, it will already be listed.

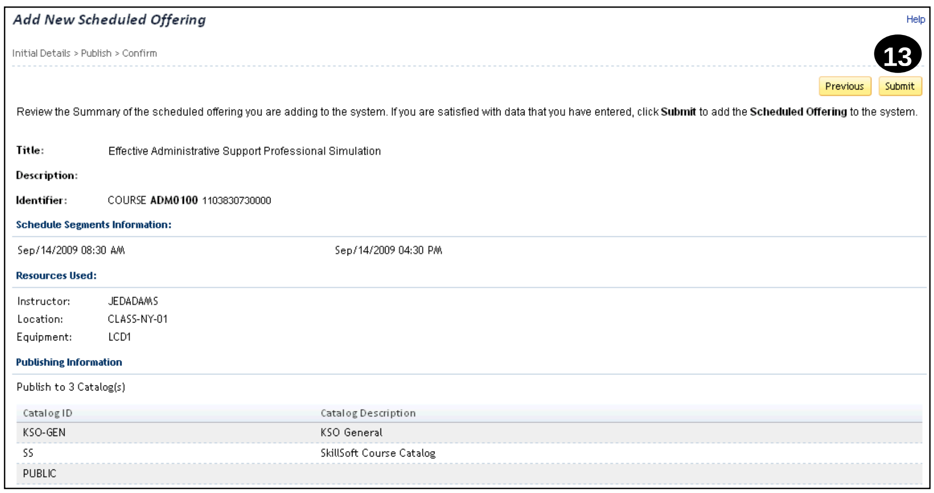
12 Click **Next**.



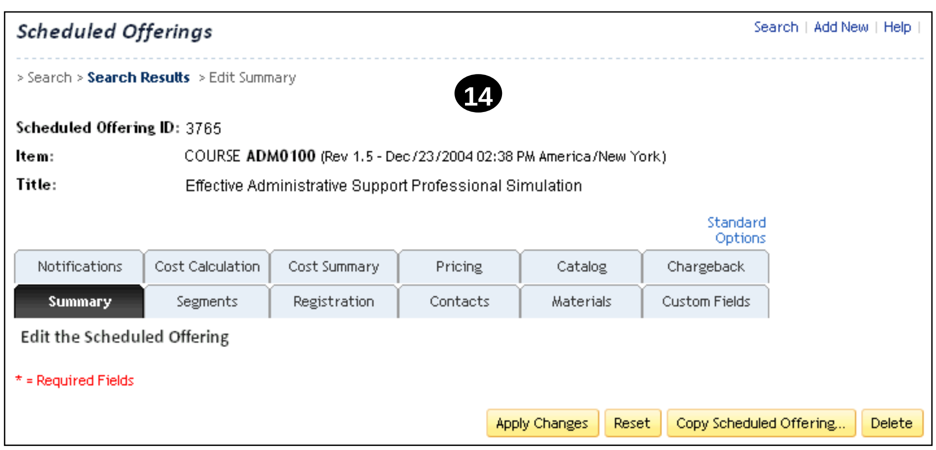
Note: If enabling self registration, the scheduled offering must reside in a catalog the intended users can view.

13 Confirm results.

Click **Submit**.



14 View the scheduled offering record.



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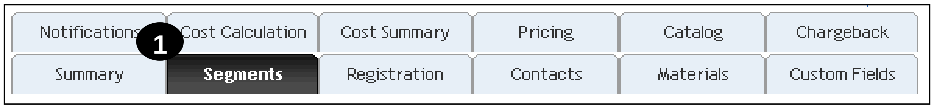
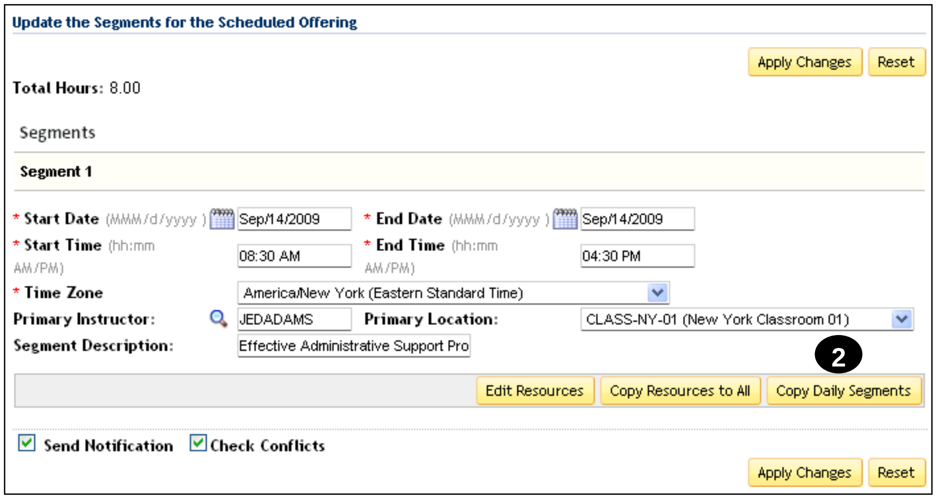
Add Additional Segments

1 Click the scheduled offering **Segments** tab.



Scroll down to view the existing segment(s).

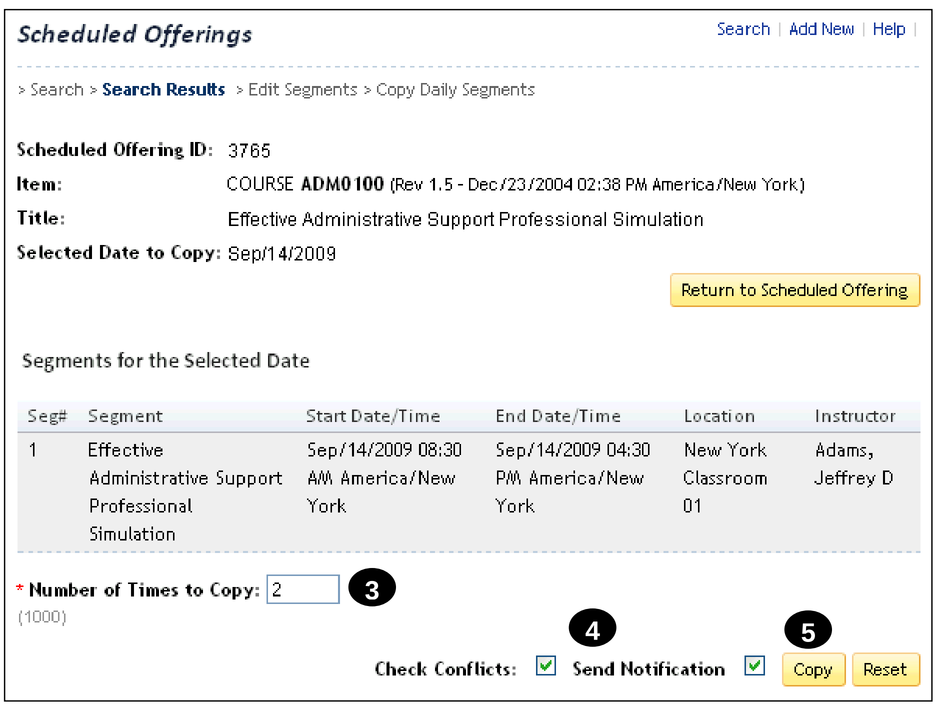
2 Choose a segment to copy and click **Copy Daily Segments**.



3 Enter a number of times to copy.

4 Select the **Check Conflicts** and/or **Send Notification** checkboxes.

5 Click **Copy**.



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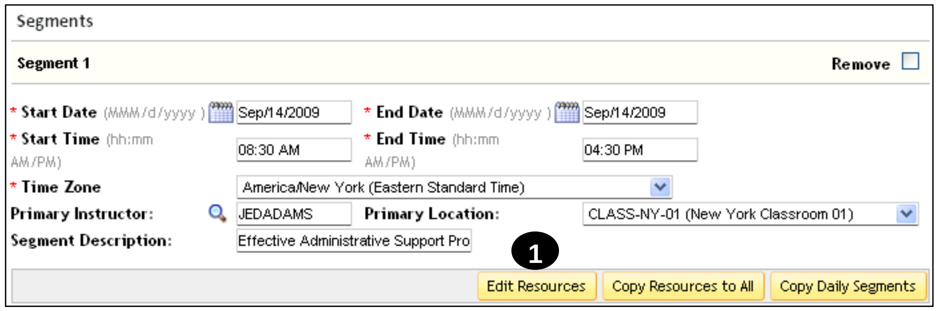
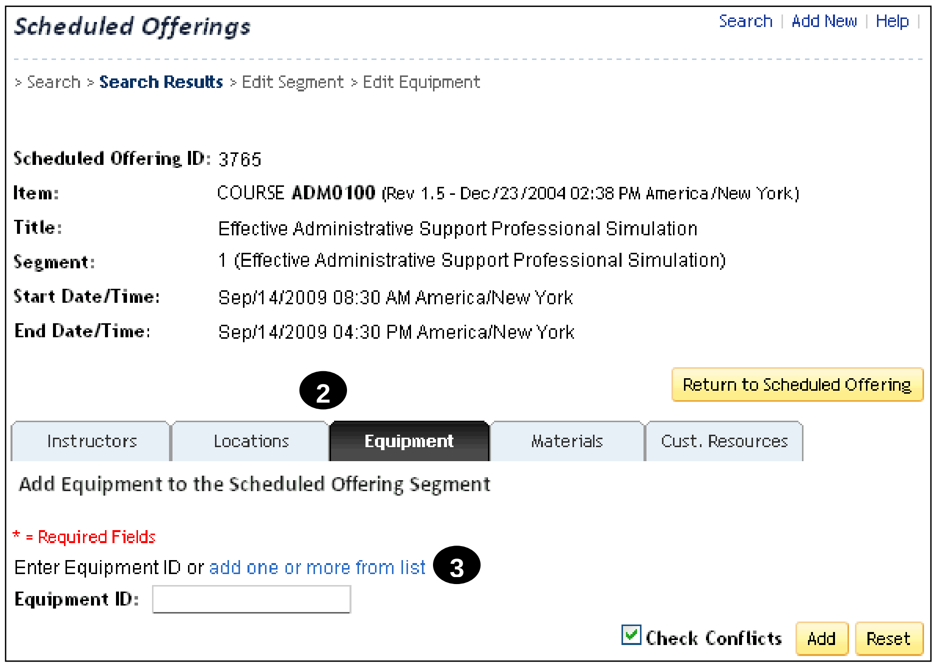
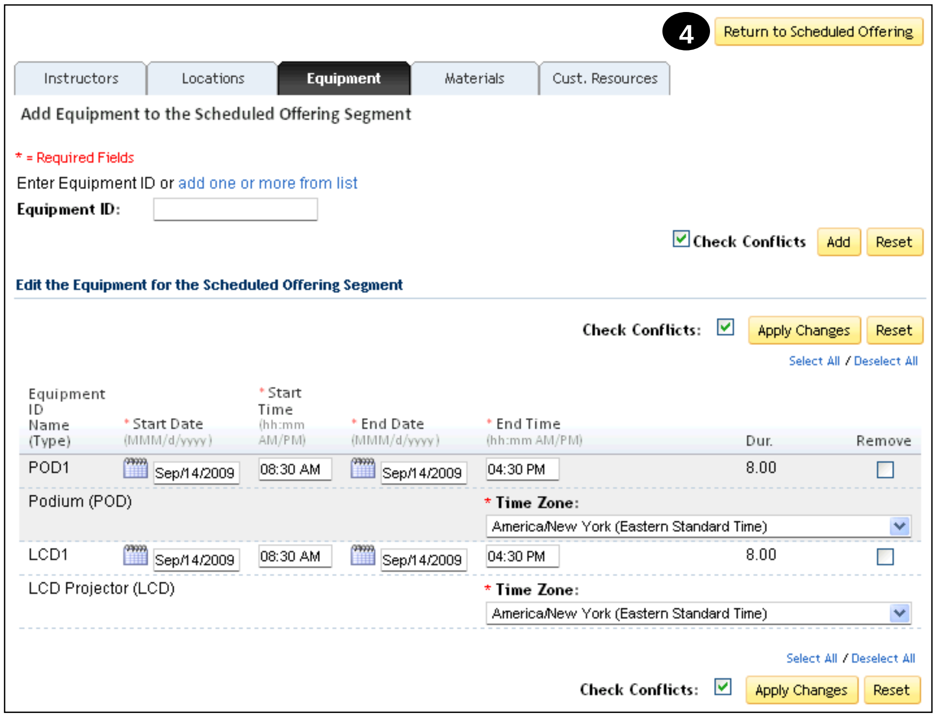
<table>
<tr><th colspan="3">Add Additional Resources</th></tr>
<tr>
<td>1</td>
<td>For the segment you wish to add resources, click Edit Resources.</td>
<td>
</td>
</tr>
<tr>
<td>2

3</td>
<td>Select the tab corresponding to the type of resource you wish to add.

Click the add one or more from list link to search for and add additional resources.</td>
<td>
</td>
</tr>
</table>

Add Additional Resources, Continued

4	When finished adding resources, click **Return to Scheduled Offering**. Note: Click **Copy Resources to All** at the segment level to copy the new resources to all segments of the scheduled offering.	

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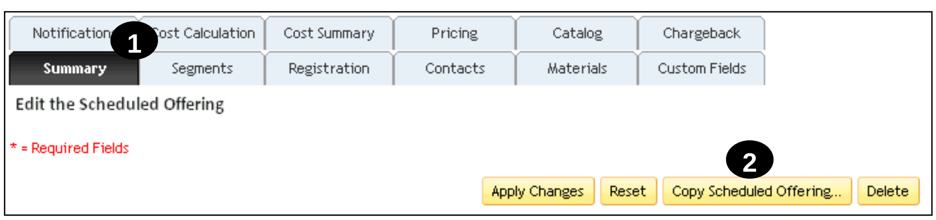
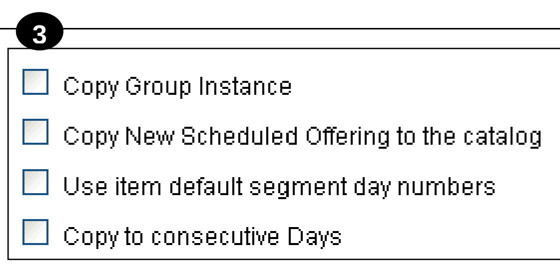
Copy Scheduled Offering

1	Select the **Summary** tab of the scheduled offering.	
2	Click **Copy Scheduled Offering...**	
3	Set copy preferences by checking associated boxes. Note: Click **Help** for additional information on each option.	

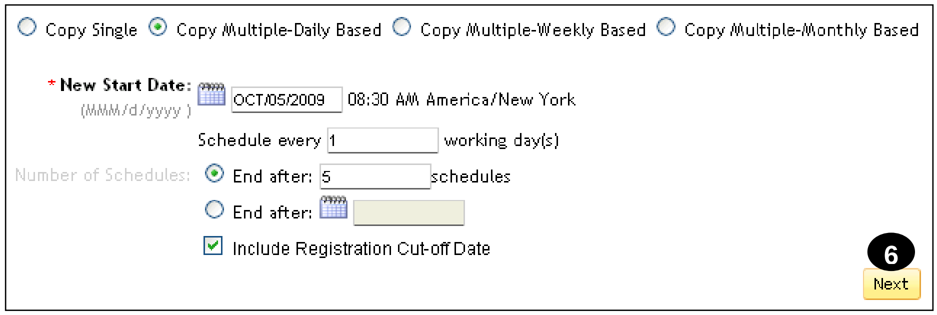
Copy Scheduled Offering, Continued

4 Select a copy frequency.

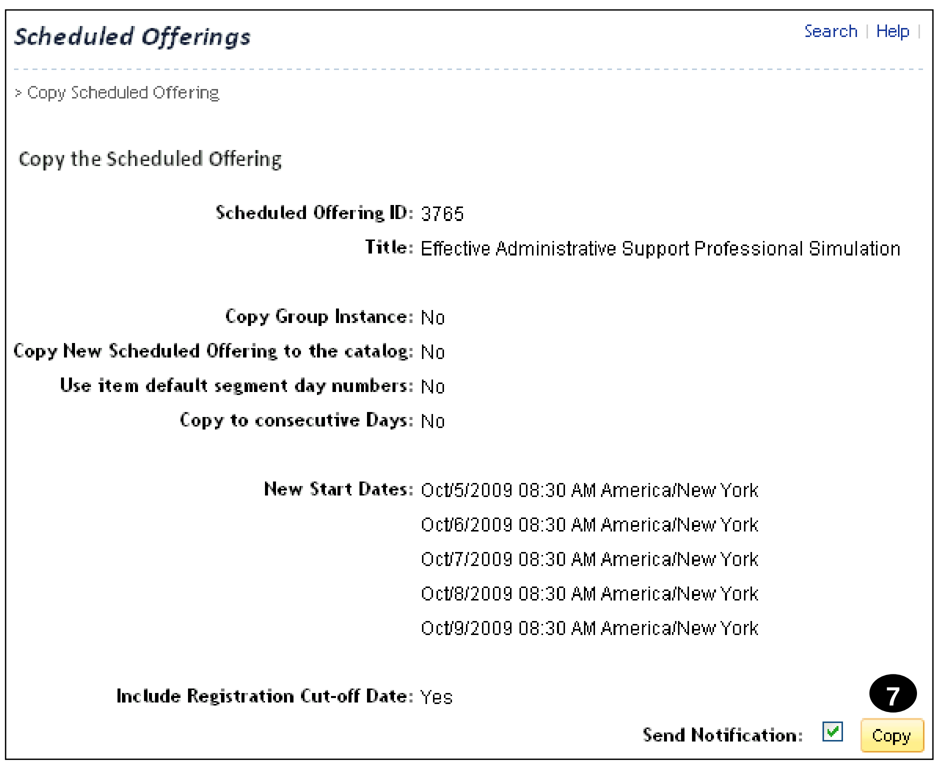
5 Select the first scheduled offering copy start date.

6 Click **Next**.

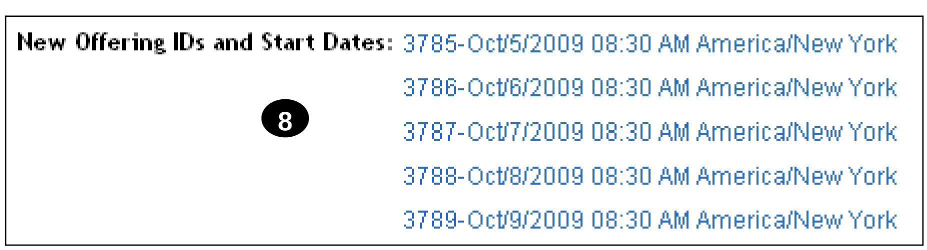
Note: If you choose an option other than Copy Single, enter a scheduling frequency as seen below. This determines how many new offerings are created and how frequently they are scheduled.



7 Confirm copy results. Click **Copy**.



8 Once the copies are created, you can access them with the links on the final screen.



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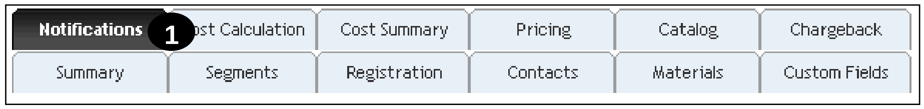
Edit Scheduled Offering Notifications

1 Select the **Notifications** tab of the scheduled offering.

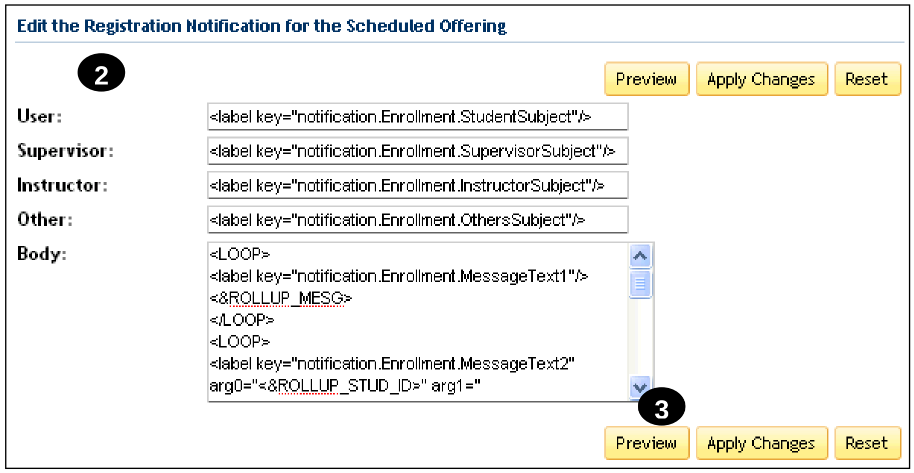


2 Scroll down to view the notification you wish to edit.

Note: You may edit the notifications sent by the following triggers:

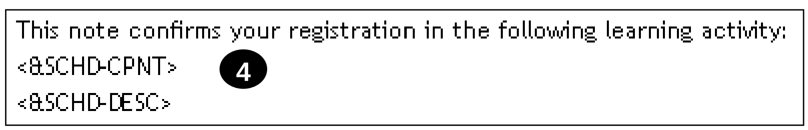
- Offering Cancellation
- User Registration
- User Withdraw
- User Waitlist
- User Waitlist Removal
- User Pending Status

Click **Preview** to view the notification.



3 In the notification body, you will see syntax tags.

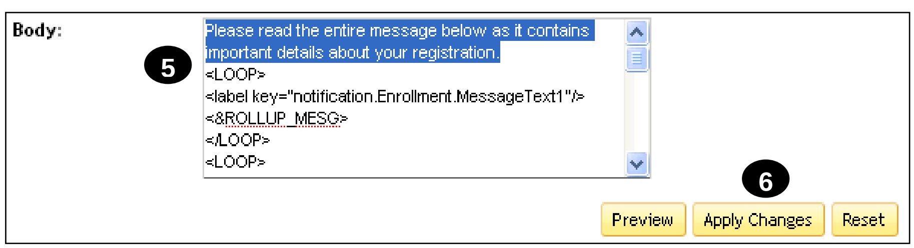
4 These indicate a database value that is included in the emails.



5 To modify the body of the notification, locate the body section and add text.

You may remove existing labels and tags, or add text around them.

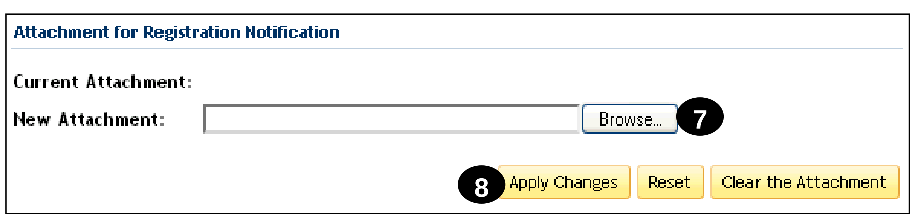
6 Click **Apply Changes**.



Note: Click Help for more information on syntax tags and how to use them in notifications.

7 To attach a document to the notification, click **Browse** to search for and select the document.

8 Click **Apply Changes**.



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Create Scheduled Offering Using the Quick Link

Description

The purpose of this job aid is to guide you through the step-by-step process of scheduling an item using the Add New Scheduled Offering Quick Link.

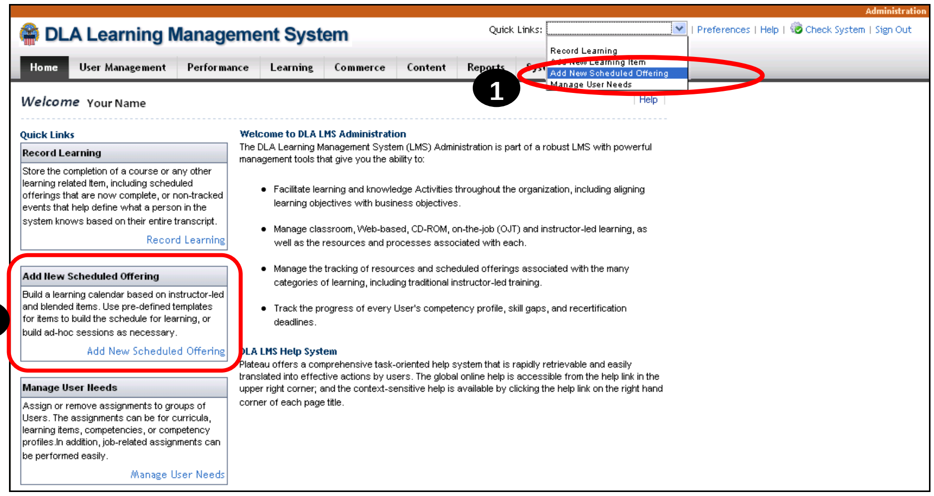
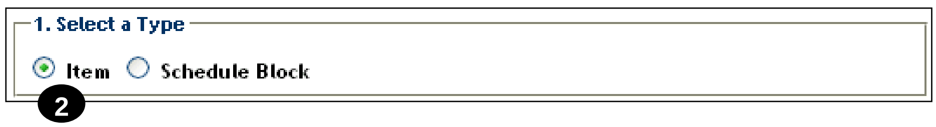
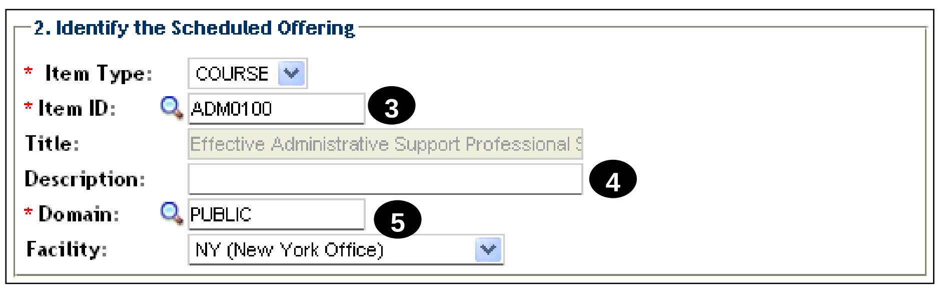
Tasks

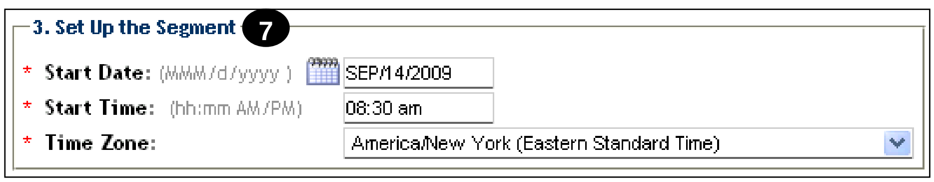
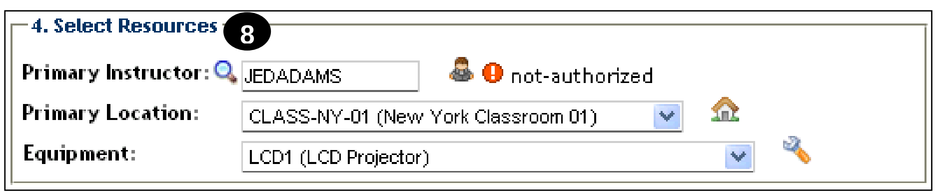
- Create Scheduled Offering
- Add Additional Segments
- Add Additional Resources
- Copy Scheduled Offering
- Edit Scheduled Offering Notifications

Terminology:

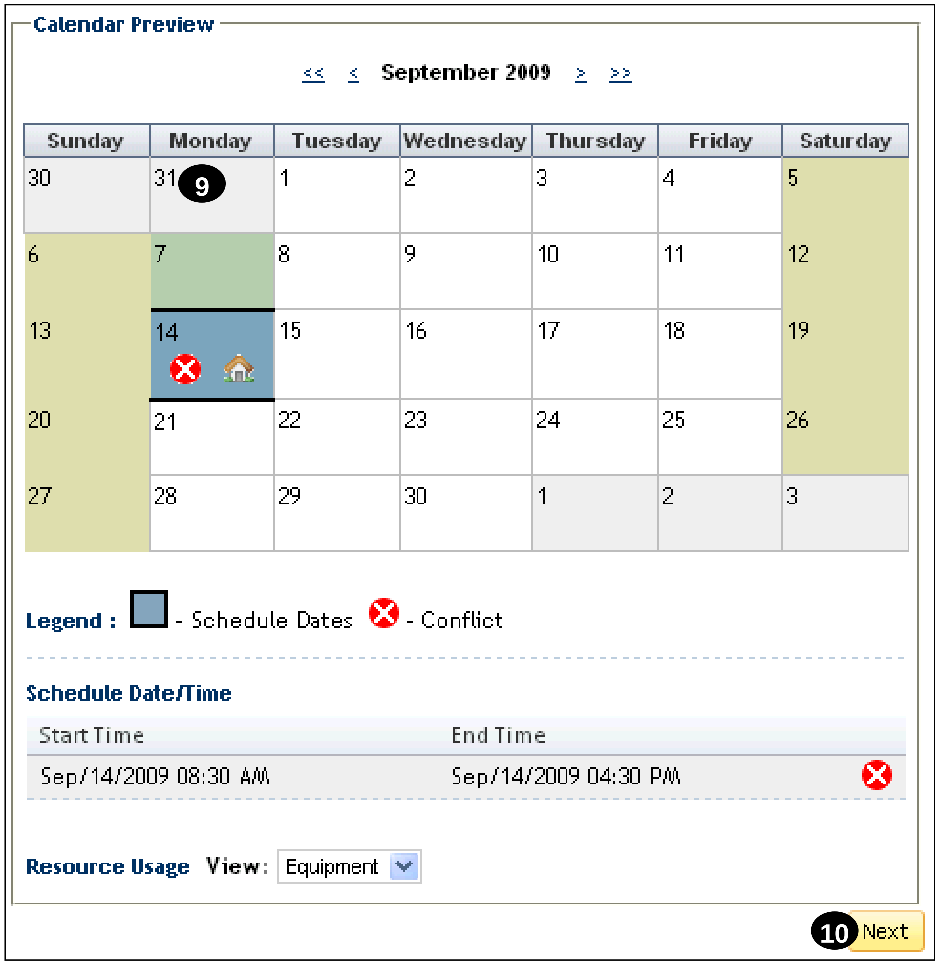
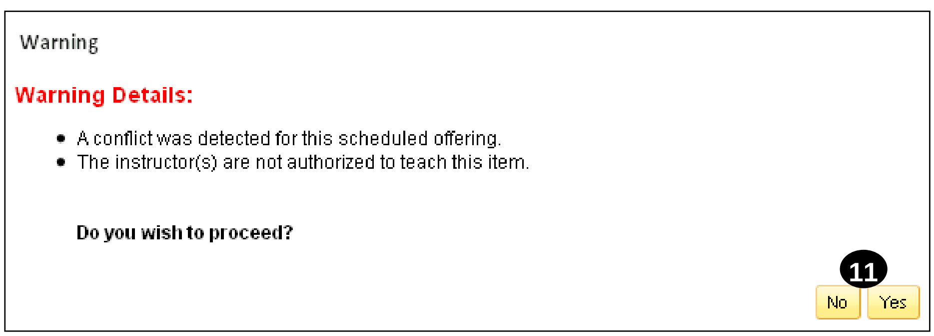
Scheduled Offering: A scheduled offering is an item or activity scheduled for delivery on a specific date and time.

Segment: Unit of division of an item offering based on duration that facilitates variable resource scheduling.

Create Scheduled Offering Using Quick Link		
1	Select **Add New Scheduled Offering** from the Quick Links drop-down menu or from the Home Page Quick Links.	
2	*Step 1: Initial Details* Select the **Item** radio button.	
3 4 5	Use the **search icon** to search for and select an item (by default the **Item Type** and **Item Title** fields will be populated once an item is selected). Enter a description of the scheduled offering. Specify the appropriate **Domain** and **Facility**.	

Create Scheduled Offering Using Quick Link, Continued		
6	View the calendar. The facility's holidays and non-working days are blocked out.	
7	Click the **calendar icon** to select a start date. Enter a start time and change the time zone of delivery, if necessary.	
8	Select **Resources**. Note: If the scheduled offering is delivered via VLS, select the VLS server and enter the password.	

Create Scheduled Offering Using Quick Link, Continued

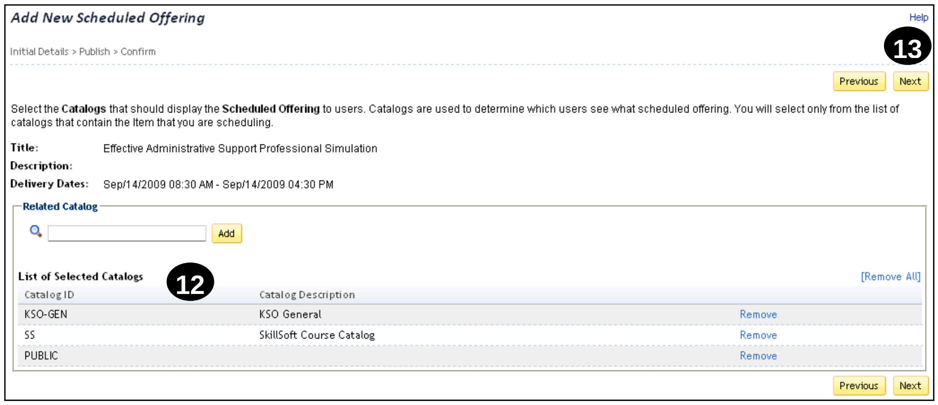
9	View the calendar again. The facility's holidays and non-working days are blocked out. Note: Resource icons illustrate other dates when resources are already allocated. Conflicts are denoted with .	
10	Click **Next**.	
11	If there are conflicts, a warning message displays. Click **No** to go back to resolve the issue, or click **Yes** to continue.	

Create Scheduled Offering Using Quick Link, Continued

12 If the item resides in a catalog, it will be listed.

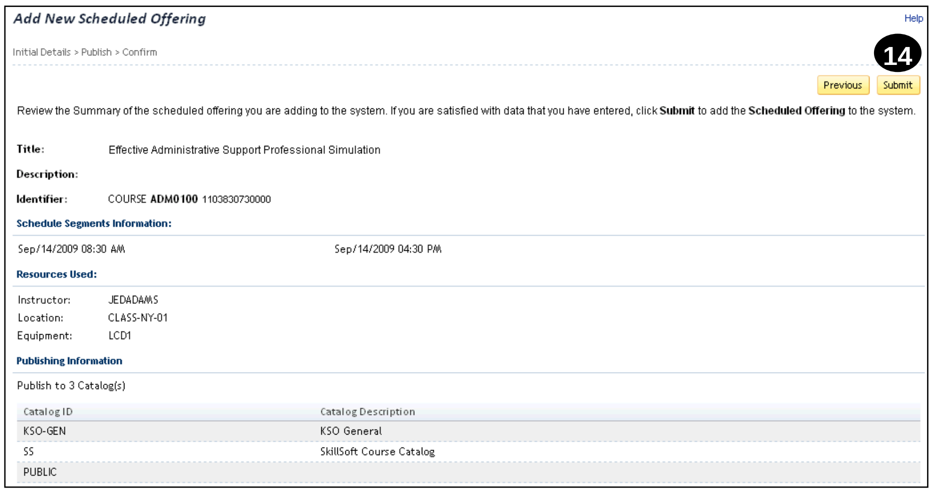
<u>Note</u>: If enabling self registration, the scheduled offering must reside in a catalog the intended users can view.

13 Click **Next**.

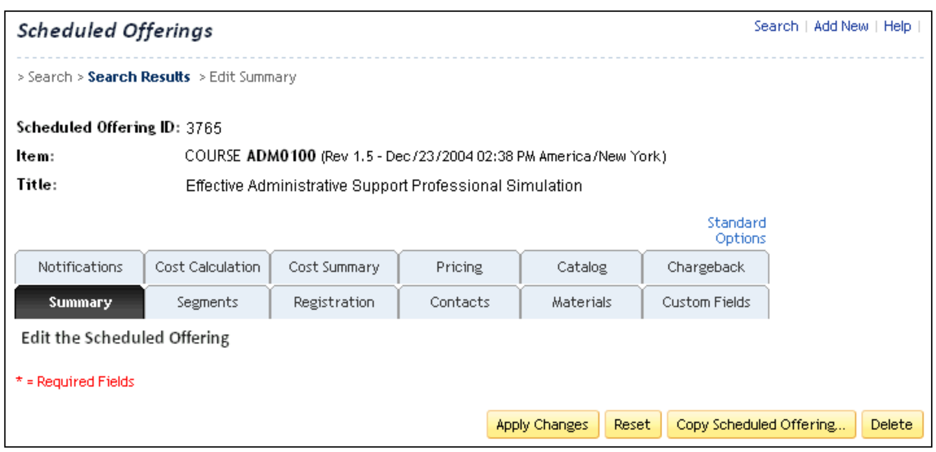


Confirm results.

14 Click **Submit**.



View the scheduled offering record.



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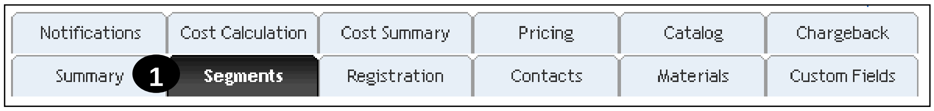
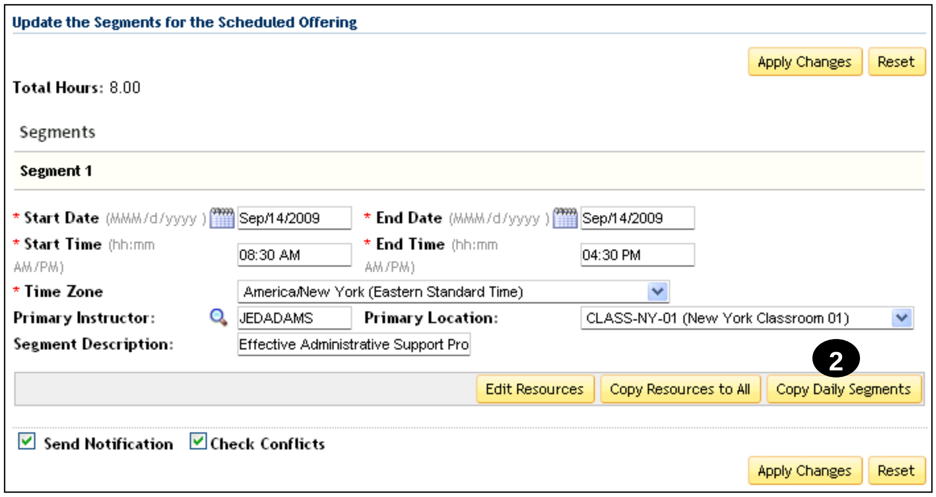
<table>
<tr><th colspan="3">Add Additional Segments</th></tr>
<tr><td>1</td><td>Select the Scheduled Offering Segments tab.</td><td>
</td></tr>
<tr><td>2</td><td>Scroll down to view the existing segment(s).

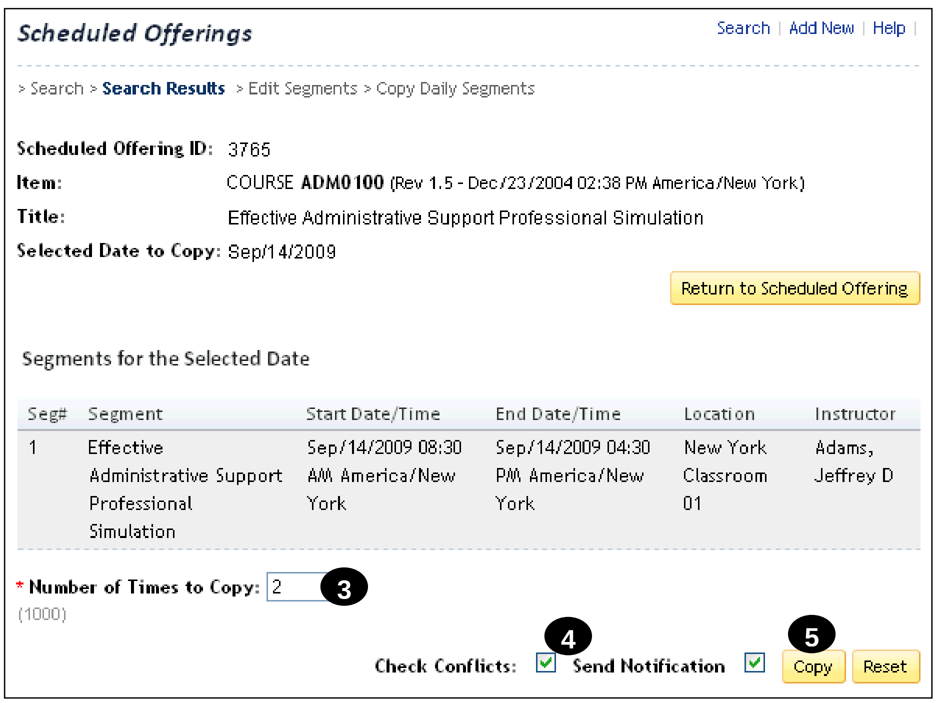
Choose a segment to copy.

Click Copy Daily Segments.</td><td>
</td></tr>
<tr><td>3

4

5</td><td>Enter a number of times to copy.

Select to Check Conflicts and/or Send Notification.

Click Copy.</td><td>
</td></tr>
</table>

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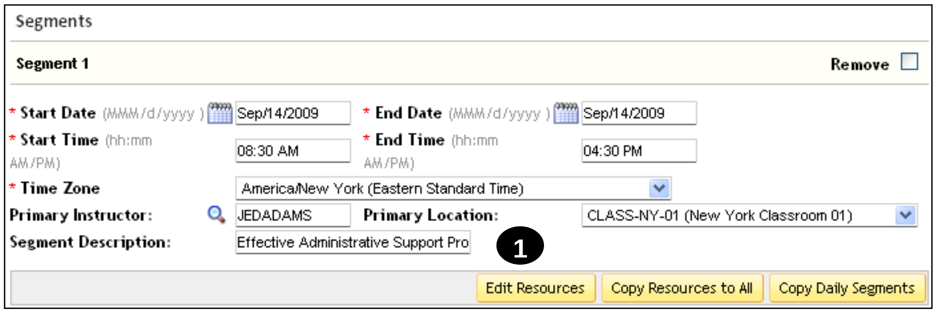
Add Additional Resources

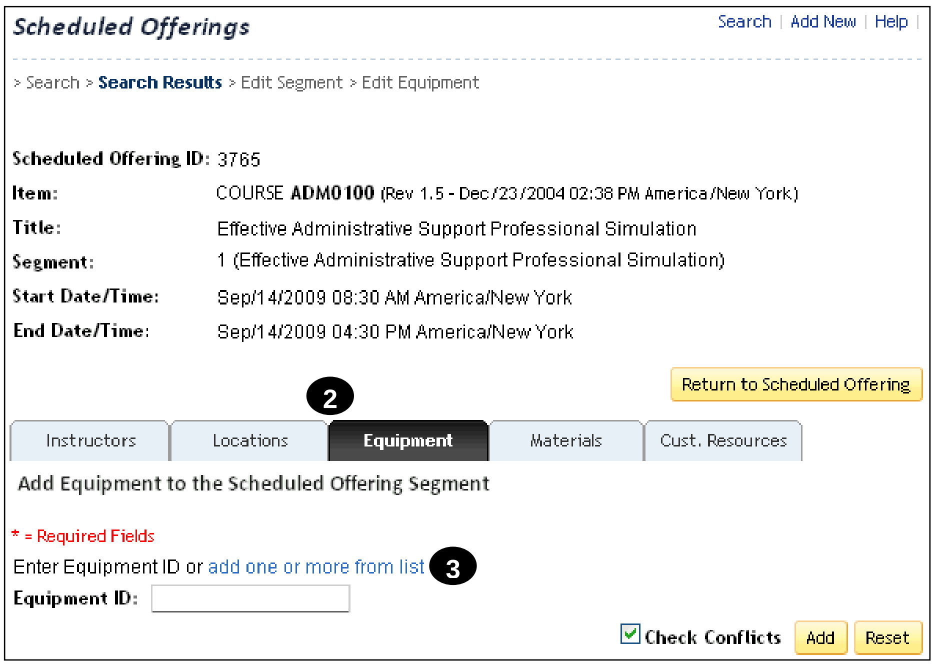
1 For the segment you wish to add resources, click the **Edit Resources** button.

Note: Click the **Copy Resources to All** button at the segment level to copy the new resources to all segments of the scheduled offering.

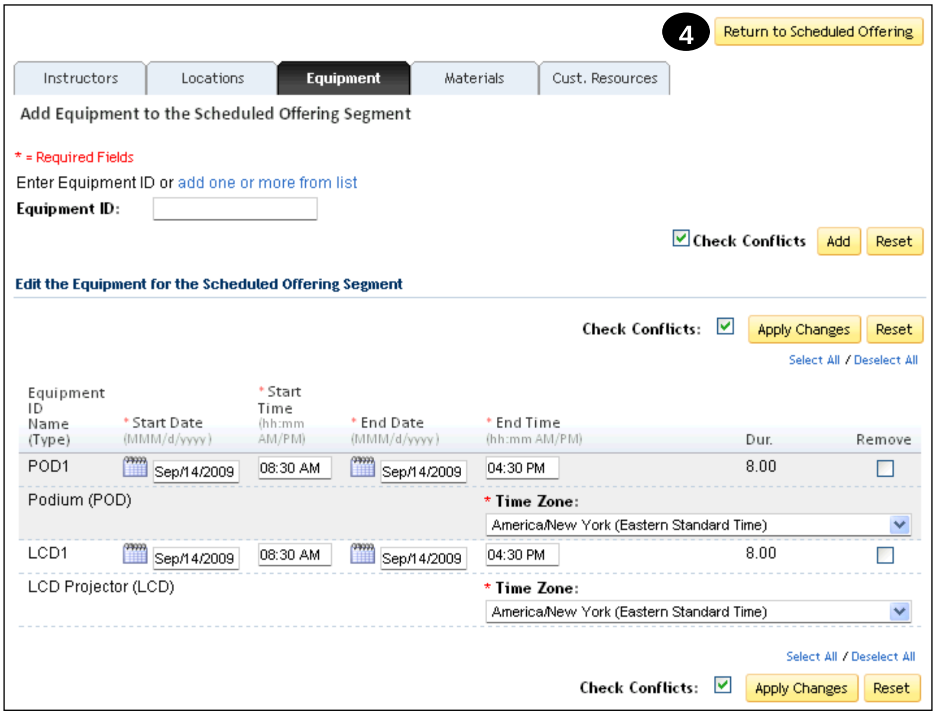


2 Select the tab for the type of resource you wish to add.

3 Click the **add one or more from list** link to search for and add additional resources.



Add Additional Resources, Continued

4	When finished adding resources, click the **Return to Scheduled Offering** button.	

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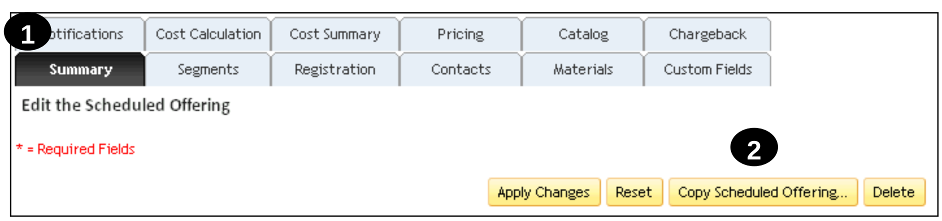
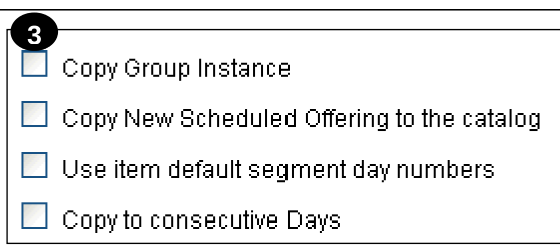
Copy Scheduled Offering

1	Select the **Summary** tab of the scheduled offering.	
2	Click **Copy Scheduled Offering**.	
3	Set copy preferences by checking associated boxes.	

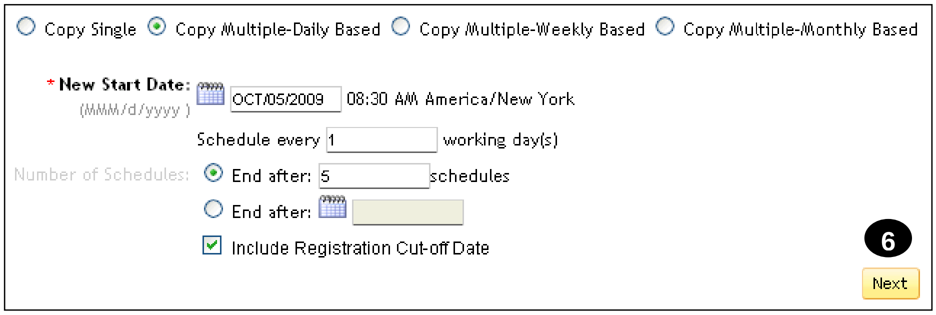
Copy Scheduled Offering, Continued

4 Click the radio button to select the copy frequency.

5 Select the first scheduled offering copy start date.

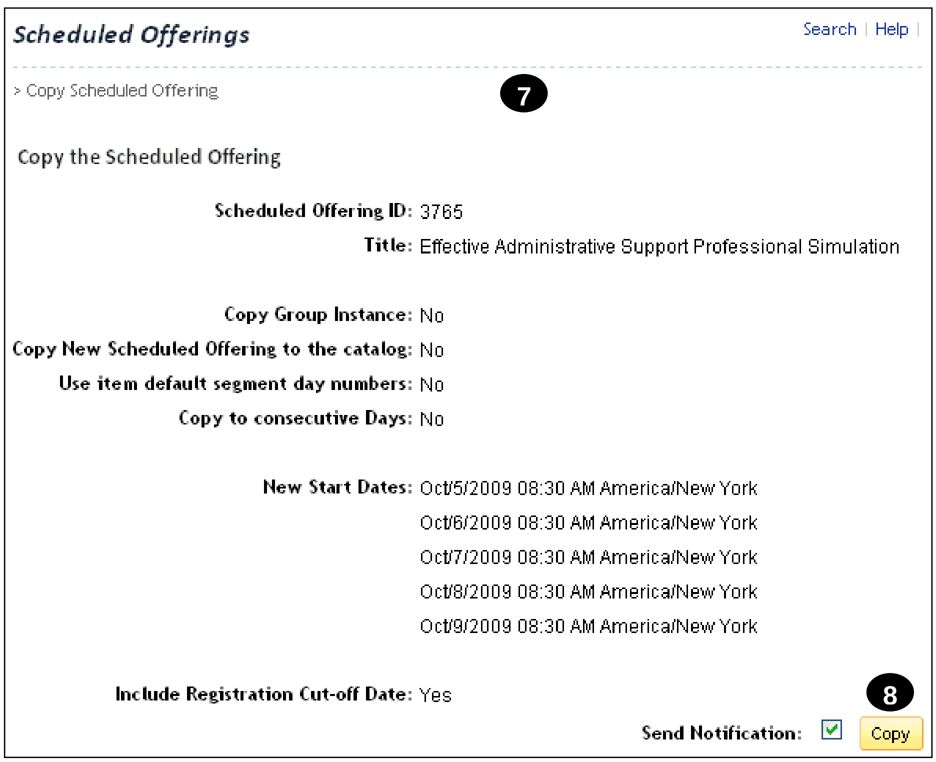
Note: If you choose an option other than Copy Single, enter a scheduling frequency. This determines how many new offerings are created and how frequently they are scheduled.

6 Click **Next**.



7 Confirm copy results.

8 Click **Copy**.



Copy Scheduled Offering, Continued		
	Note: Once the copies are created, you can access them using the links on the final screen.	**New Offering IDs and Start Dates:** 3785-Oct/5/2009 08:30 AM America/New York 3786-Oct/6/2009 08:30 AM America/New York 3787-Oct/7/2009 08:30 AM America/New York 3788-Oct/8/2009 08:30 AM America/New York 3789-Oct/9/2009 08:30 AM America/New York

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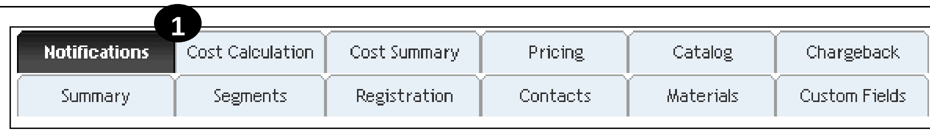
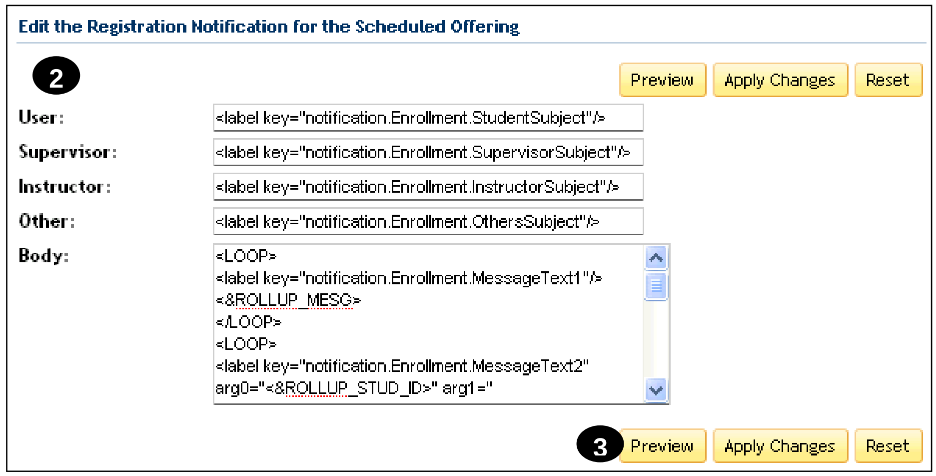
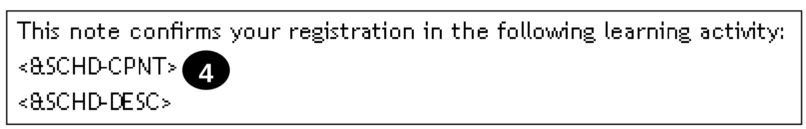
<table>
<tr><th colspan="3">Edit Scheduled Offering Notifications</th></tr>
<tr><td>1</td><td>Select the Notifications tab of the scheduled offering.</td><td>
</td></tr>
<tr><td>2

3</td><td>Scroll down to view the notification you wish to edit.

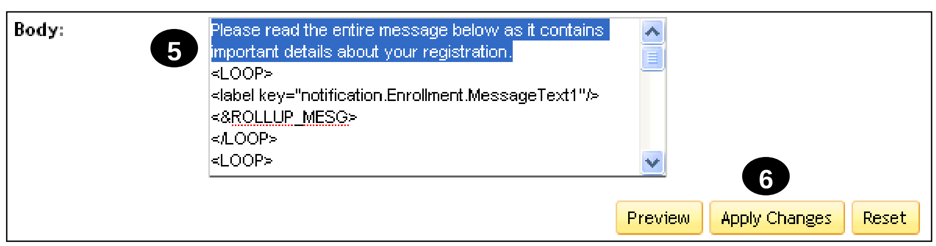
<u>Note</u>: You may edit the notifications sent by the following triggers:

- Offering Cancellation
- User Registration
- User Withdraw
- User Waitlist
- User Waitlist Removal
- User Pending Status

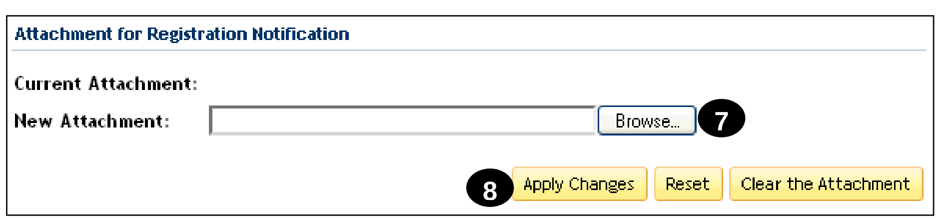
Click Preview to view the notification.</td><td>
</td></tr>
<tr><td>4</td><td><u>Note</u>: In the notification preview, you will see syntax tags. These indicate a database value that is included in the emails.</td><td>
</td></tr>
<tr><td>5

6</td><td>To modify the body of the notification, locate the body section and add text.

<u>Note</u>: You may remove existing labels and tags, or add text around them.

Click Apply Changes.</td><td>
</td></tr>
<tr><td>7

8</td><td>To attach a document to the notification, click the Browse button to search for and select it.

Click Apply Changes.</td><td>
</td></tr>
</table>

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Registration Management

Description

The purpose of this job aid is to guide administrators through the step-by-step process of configuring registration parameters, and registering users.

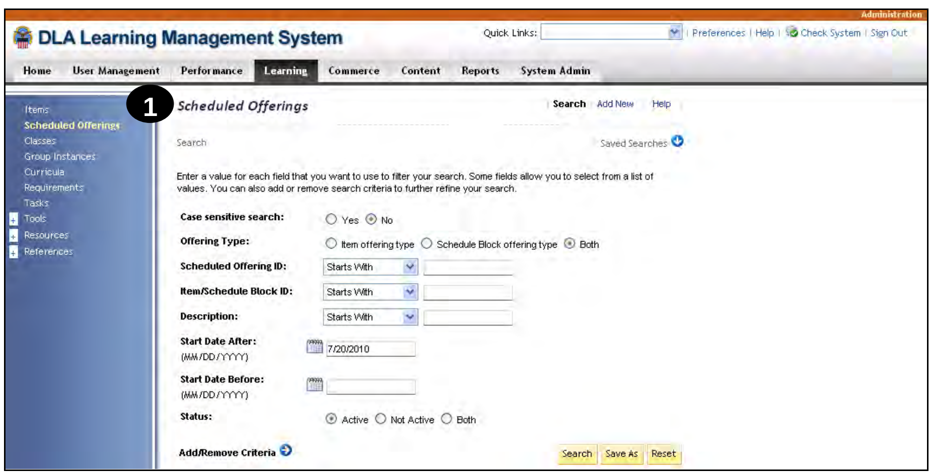
Tasks

- Set Self-Registration Parameters
- Set Registration Approval Process
- Register Users in an Offering
- Register Users in an Offering – from request list
- Add Slots to an Offering
- Reserve Slots in an Offering
- Change Registration Status of User

Set Self Registration Parameters

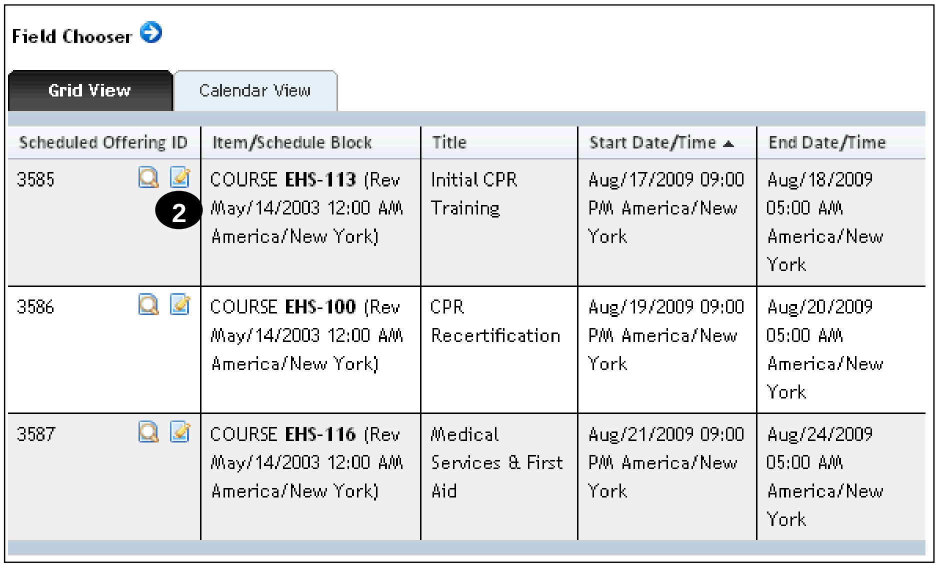
1. Navigate to **Learning > Scheduled Offerings**.

   Enter criteria to search for a scheduled offering.



Set Self Registration Parameters, Continued

2 Click the **edit icon** for the scheduled offering.



3 Select the **Summary** tab of the scheduled offering.

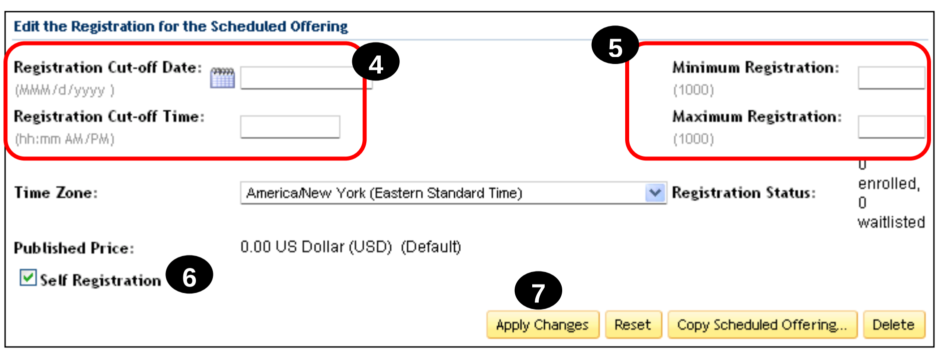
Scroll down to the *Edit Registration* section of the screen.

4 Enter a registration cut-off date and time.

5 Set the minimum and maximum registration.

6 Click to check the **Self Registration** checkbox.

7 Click **Apply Changes**.



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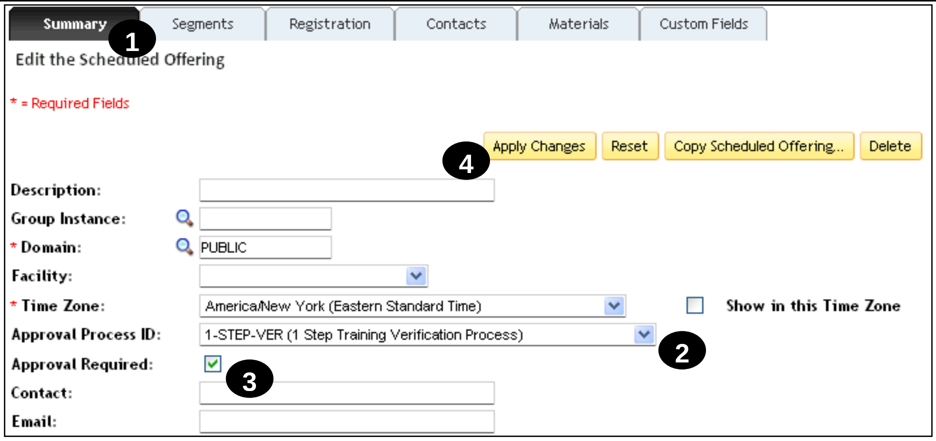
Set Registration Approval Process

1. Select the **Summary** tab of the scheduled offering.
2. Select the approval process from the drop-down menu.
3. Check the **Approval Required** checkbox.
4. Click **Apply Changes**.



Note: Steps and users associated with approval processes are configured in the System Admin menu.

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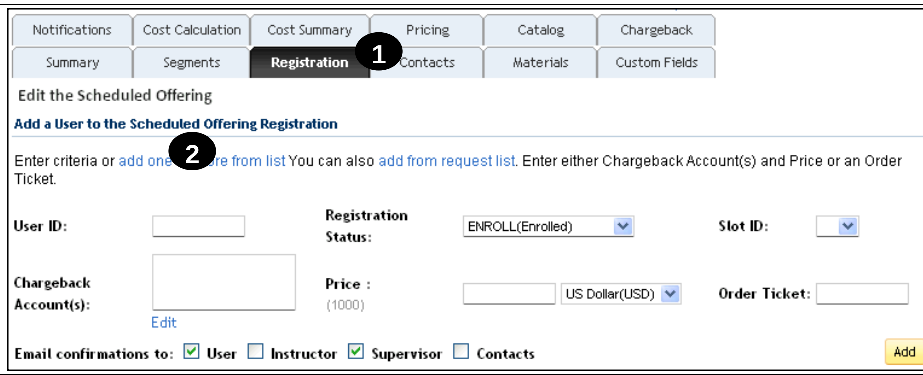
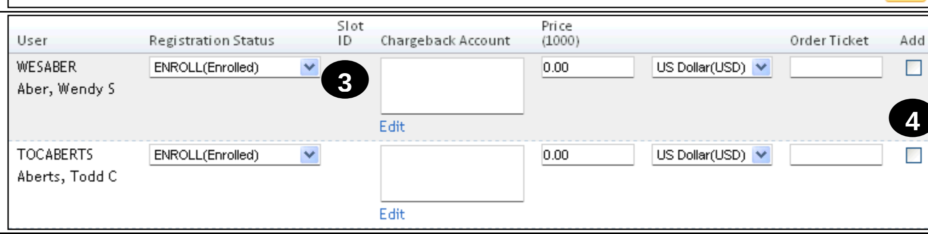
Register Users in an Offering

1. Select the **Registration** tab of the scheduled offering.
2. Click the **add one or more from list** link to search for and select users to register.



3. Select the user Registration Status.
4. Check the **Add** checkbox.



5. Select notification preferences.
6. Click **Add**.

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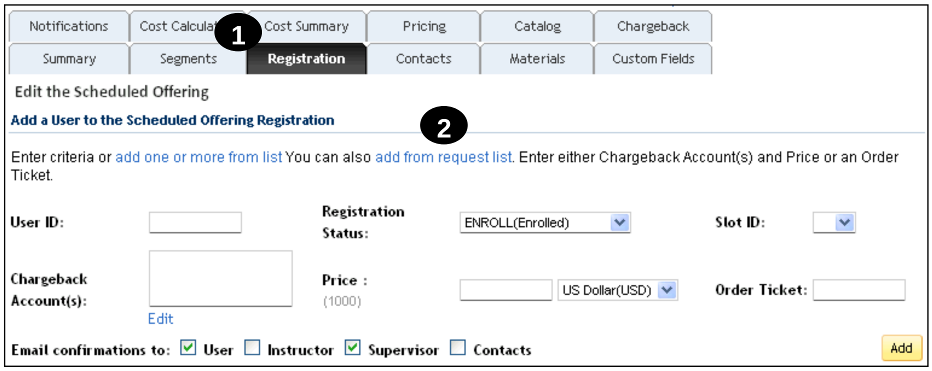
Register Users in an Offering – from request list

1. Select the **Registration** tab of the scheduled offering.

2. Click the **add from request list** link to search for and select users to register.

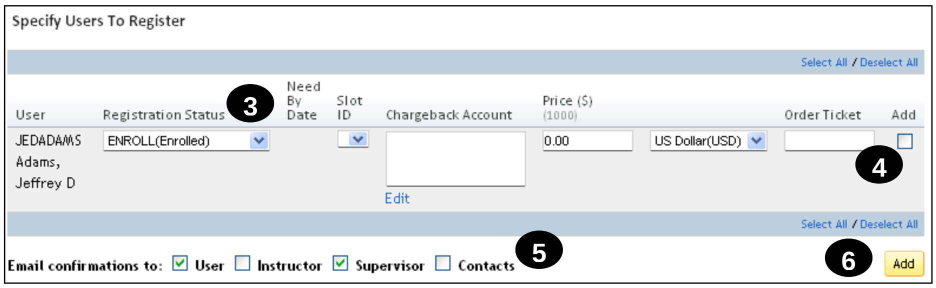


3. Select the user Registration Status.

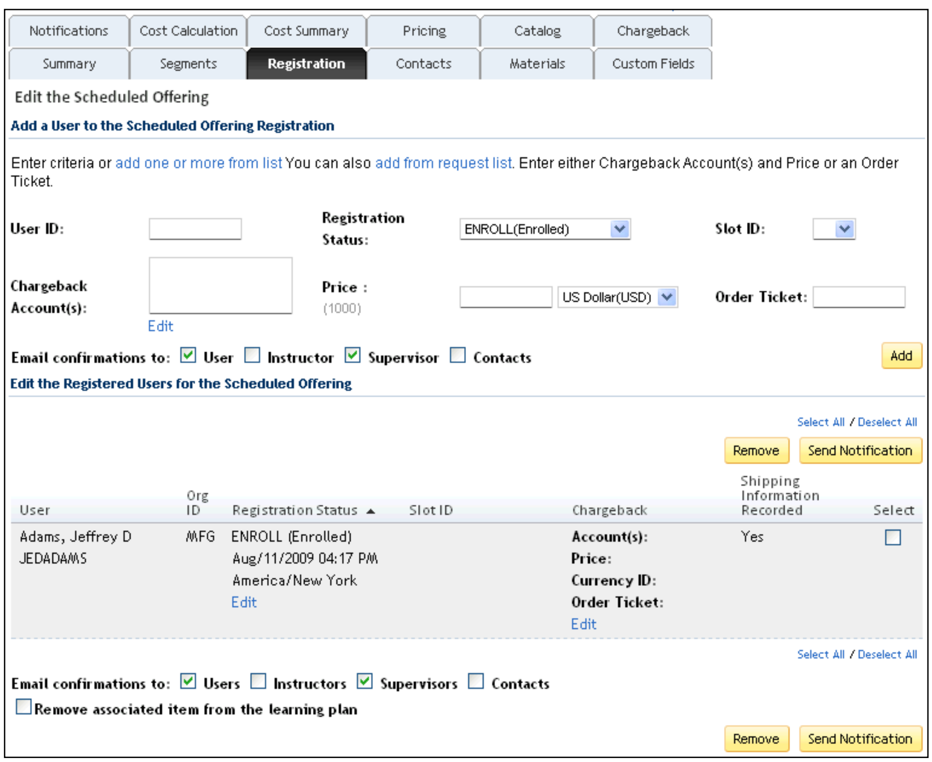
4. Check the **Add** checkbox.

5. Check notification preferences.

6. Click **Add**.



The user who requested this schedule is now enrolled.



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Add Slots to an Offering

1. Select the **Registration** tab of the scheduled offering.

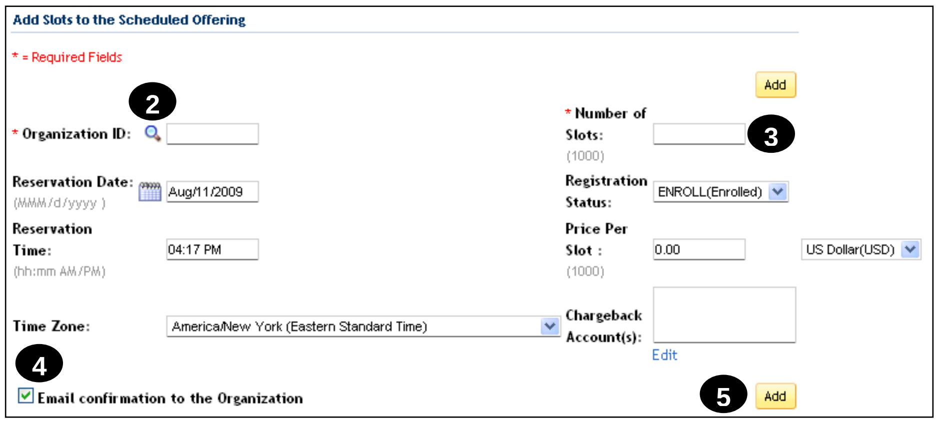
Scroll down to the *Add Slots to the Scheduled Offering* section of the screen.

2. Click the **search icon** to search for and select the organization reserving slots.

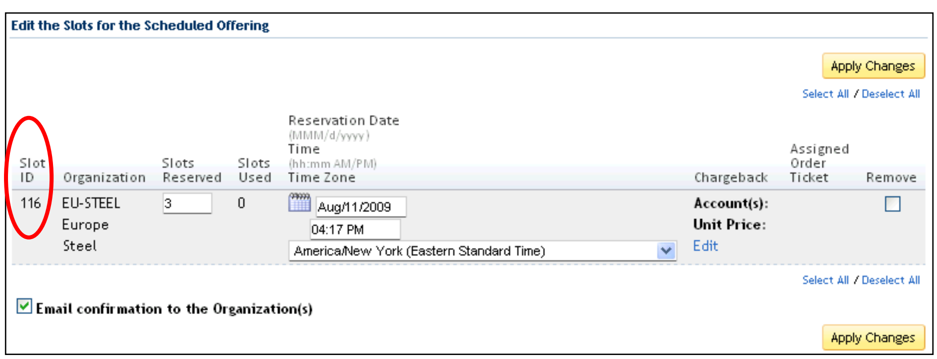
3. Enter a number of slot reservations.

4. Check the email confirmation checkbox, if desired.

5. Click **Add**.



Slots have been reserved for this organization. Note the Slot ID.



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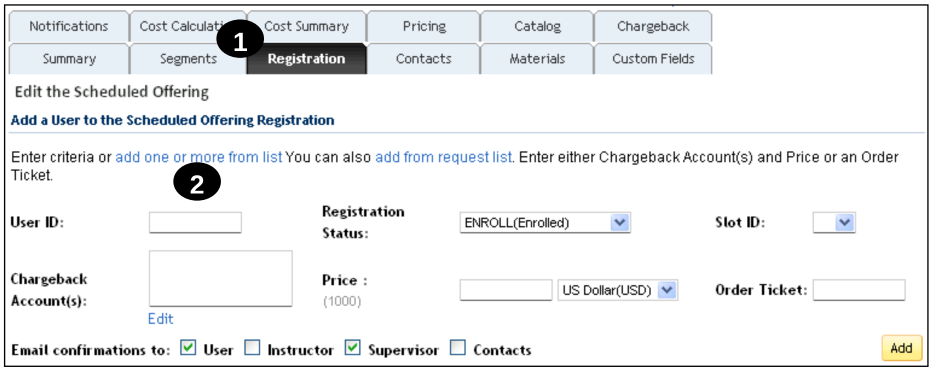
Reserve Slots in an Offering

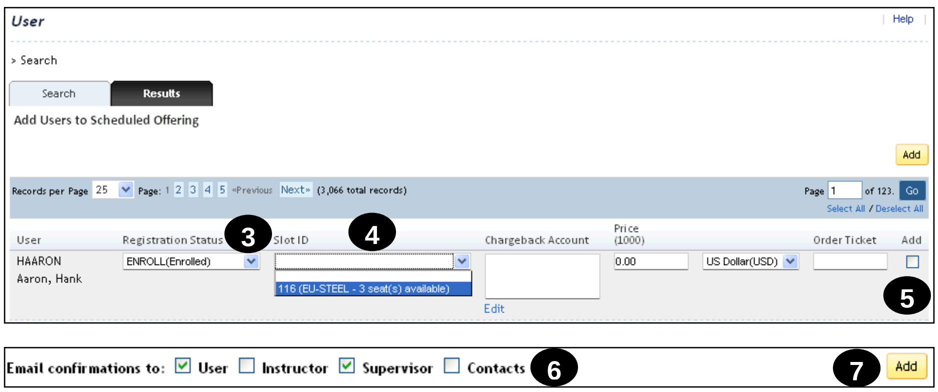
1. Select the **Registration** tab of the scheduled offering.

   Scroll down to the *Add a User* section.

2. Click the **add one or more from list** link to search for and select users to register.



3. Select the user Registration Status.
4. Select Slot ID to use.
5. Check the **Add** checkbox.
6. Select notification preferences.
7. Click **Add**.



The user has been registered in the scheduled offering, using one slot.

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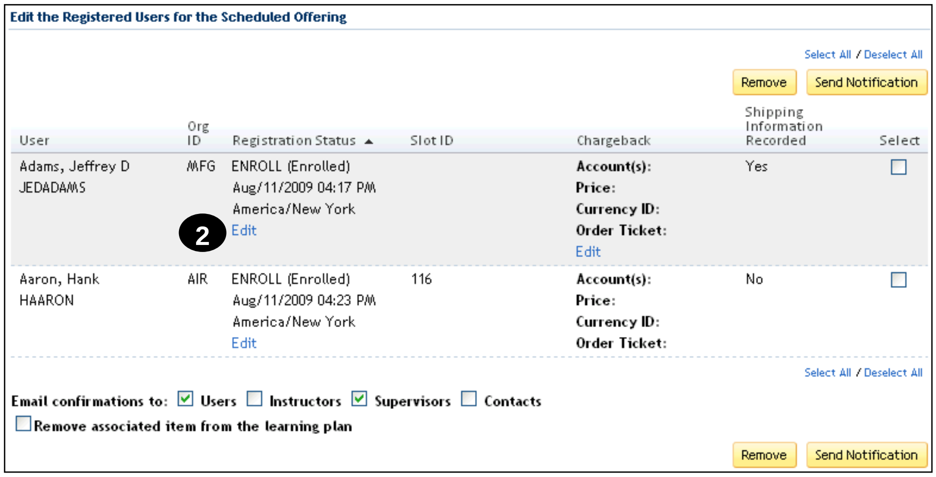
Change Registration Status of User

1 Select the **Registration** tab of the scheduled offering.

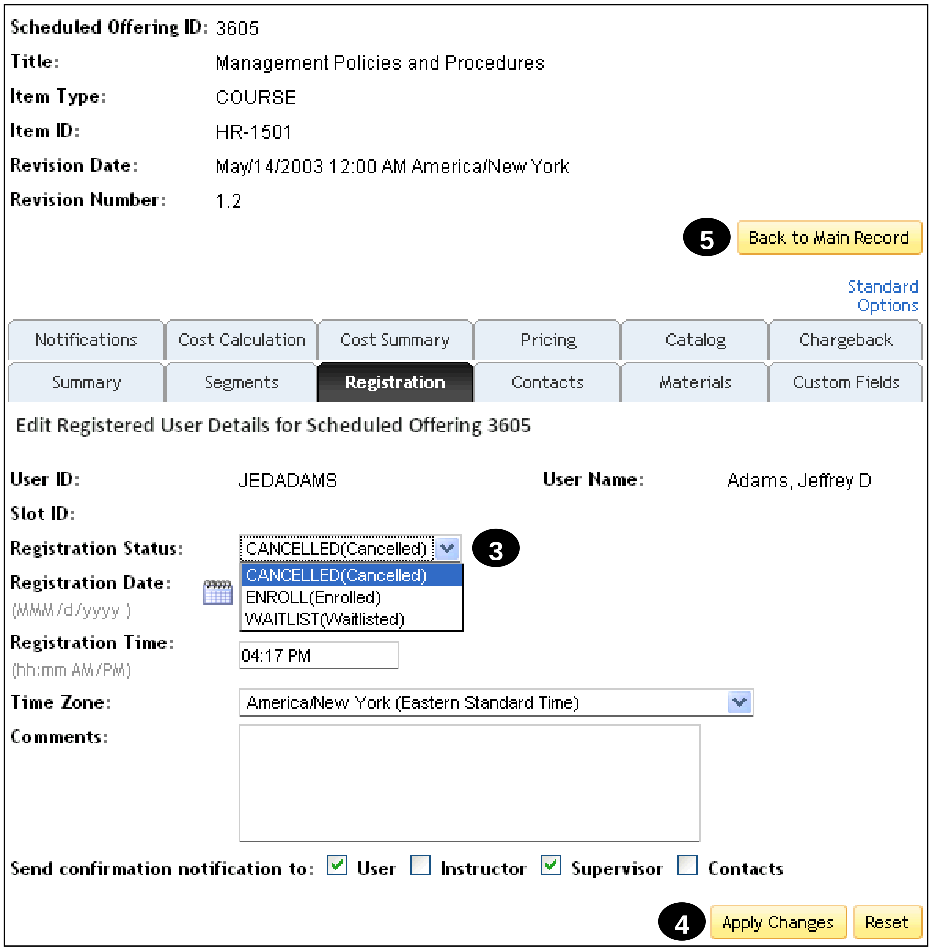
Scroll down to the Edit the Registered Users for the Scheduled Offering section of the screen.

2 Click the **Edit** link for the user whose registration status you wish to change.

<u>Note</u>: Only "Remove" a user from a Scheduled Offering if the registration was an admin error, otherwise use the "Cancelled" Registration Status.

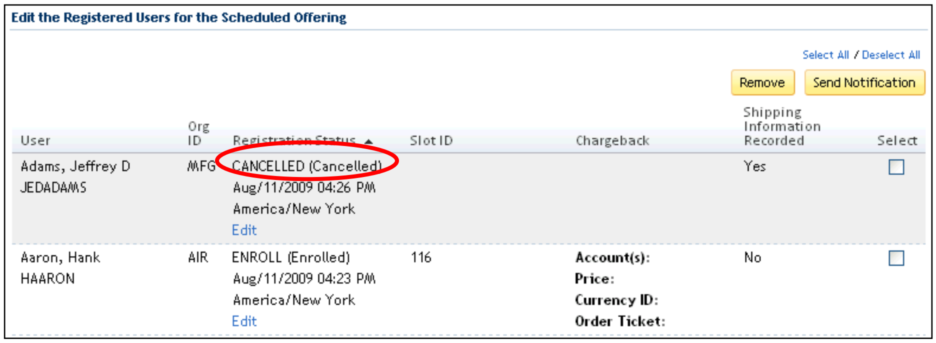


Change Registration Status of User, Continued

3	Change the user Registration Status. Change any other registration data, add comments, or select notification options.	
4	Click **Apply Changes**.	
5	Click **Back to Main Record**. <u>Note</u>: If you withdraw a user from an offering, you will see a warning if this item is a prerequisite for another enrollment. You then have the option to withdraw or cancel the user from the dependent offering.	

Change Registration Status of User, Continued

The user's registration status has been changed.



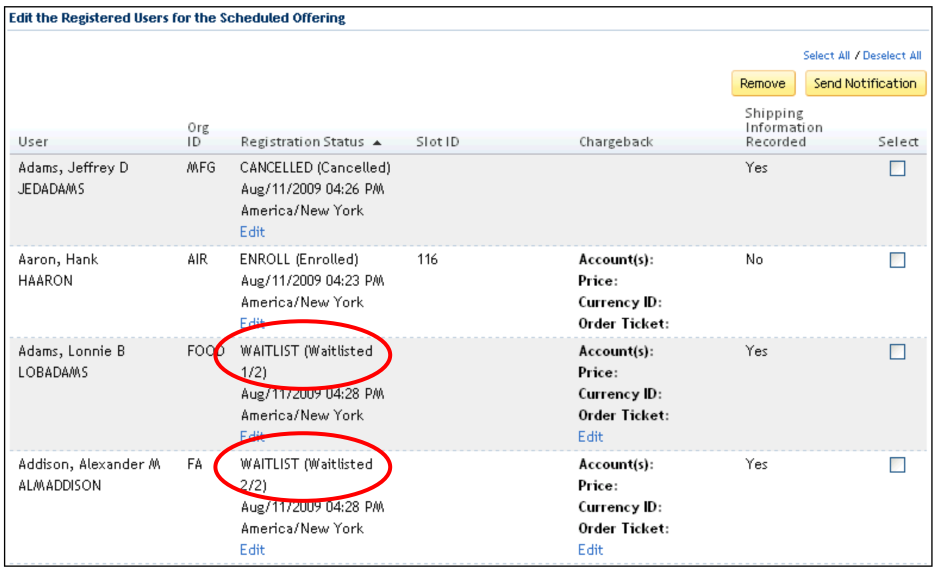
Edit the Registered Users for the Scheduled Offering

Select All / Deselect All

Remove | Send Notification

User	Org ID	Registration Status ▲	Slot ID	Chargeback	Shipping Information Recorded	Select
Adams, Jeffrey D JEDADAMS	MFG	CANCELLED (Cancelled) Aug/11/2009 04:26 PM America/New York Edit			Yes	☐
Aaron, Hank HAARON	AIR	ENROLL (Enrolled) Aug/11/2009 04:23 PM America/New York Edit	116	**Account(s):** **Price:** **Currency ID:** **Order Ticket:**	No	☐

If a user's status is Waitlist, the place on the waitlist will be indicated (for example, 1 of 5).



Edit the Registered Users for the Scheduled Offering

Select All / Deselect All

Remove | Send Notification

User	Org ID	Registration Status ▲	Slot ID	Chargeback	Shipping Information Recorded	Select
Adams, Jeffrey D JEDADAMS	MFG	CANCELLED (Cancelled) Aug/11/2009 04:26 PM America/New York Edit			Yes	☐
Aaron, Hank HAARON	AIR	ENROLL (Enrolled) Aug/11/2009 04:23 PM America/New York Edit	116	**Account(s):** **Price:** **Currency ID:** **Order Ticket:**	No	☐
Adams, Lonnie B LOBADAMS	FOOD	WAITLIST (Waitlisted 1/2) Aug/11/2009 04:28 PM America/New York Edit		**Account(s):** **Price:** **Currency ID:** **Order Ticket:** Edit	Yes	☐
Addison, Alexander M ALMADDISON	FA	WAITLIST (Waitlisted 2/2) Aug/11/2009 04:28 PM America/New York Edit		**Account(s):** **Price:** **Currency ID:** **Order Ticket:** Edit	Yes	☐

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Registration Assistant Tool

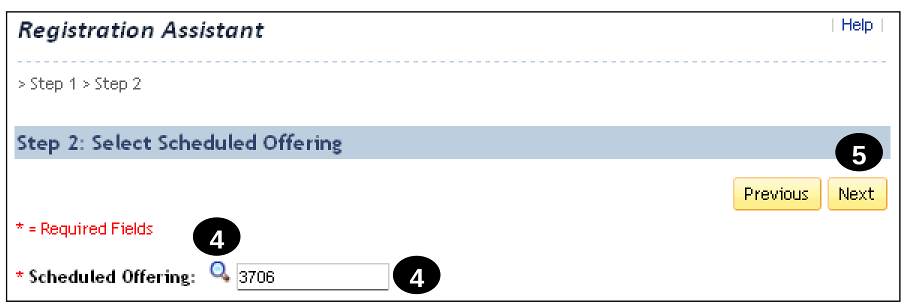
Description

The purpose of this job aid is to guide administrators through the step-by-step process of using the Registration Assistant tool.

Tasks

- Use Registration Assistant to Register Users in a Scheduled Offering
- Use Registration Assistant to Withdraw Users from a Scheduled Offering
- Use Registration Assistant to Add Slots to a Scheduled Offering

Use Registration Assistant to Register Users in a Scheduled Offering

1	Navigate to **Learning > Tools > Registration Assistant**. *Step 1: Select Action* of the Registration Assistant displays.	
2	Select **Register Users**.	
3	Click **Next**.	
	Step 2: Select Scheduled Offering of the Registration Assistant displays.	
4	Enter scheduled offering ID. or	
4	Select the search icon to search for and select a scheduled offering.	
5	Click **Next**.	

Use Registration Assistant to Register Users in a Scheduled Offering, Continued

Step 3: Add Users of the Registration Assistant displays.

6 Enter User ID.

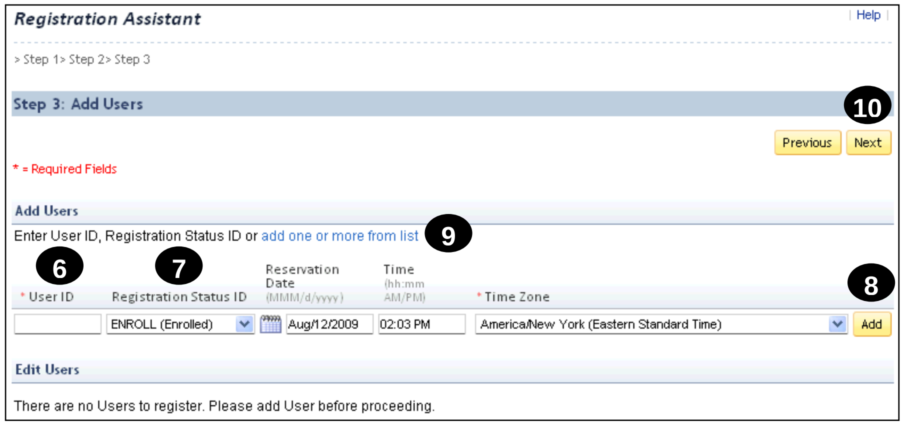
7 Select **Registration Status ID** from drop-down menu.

8 Click **Add**.

or

9 Click the **add one or more from list** link to search and select user(s) to add.

10 Click **Next**.

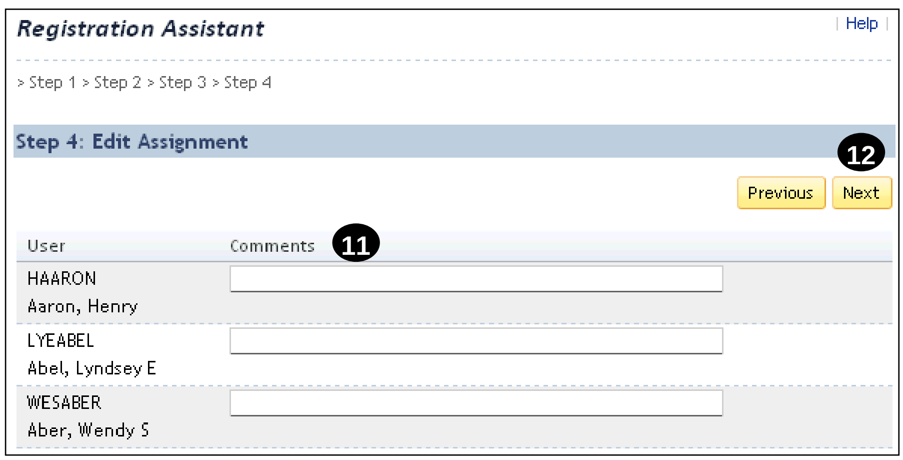


Note: Reservation Date and Time will default to current date and time; and Time Zone will default to your administrator time zone setting.

Step 4: Edit Assignment of the Registration Assistant displays.

11 Enter any comments as necessary.

12 Click **Next**.



Use Registration Assistant to Register Users in a Scheduled Offering, Continued

Step 5: Edit Financial Data of the Registration Assistant displays. Skip to Step 14 if no financial data is necessary.

13 If applicable, select Slot ID from the drop-down menu.

or

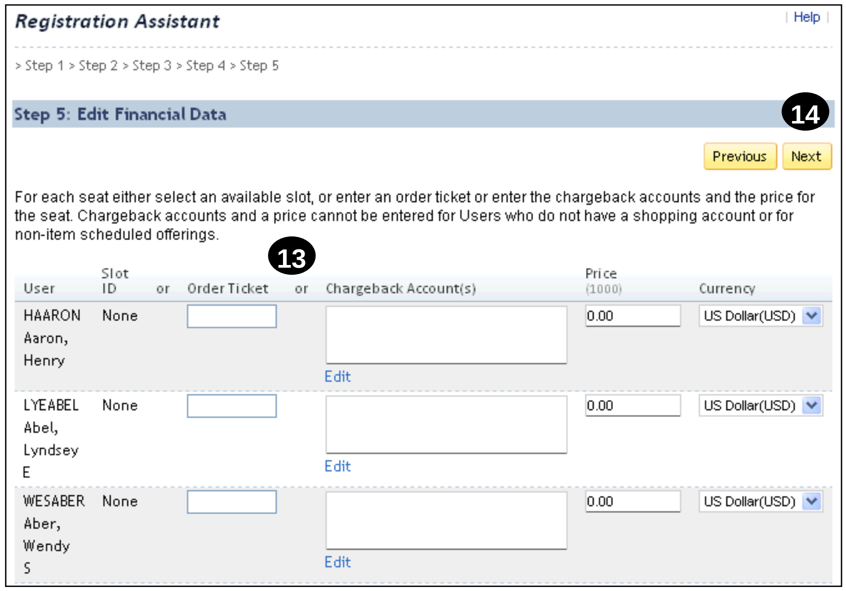
13 Enter an Order Ticket number.

or

13 Enter Chargeback Account.

Note: If there is a Chargeback Account, you must have a Price. If no financial data is necessary, clear both of these fields before selecting Next.

14 Click **Next**.

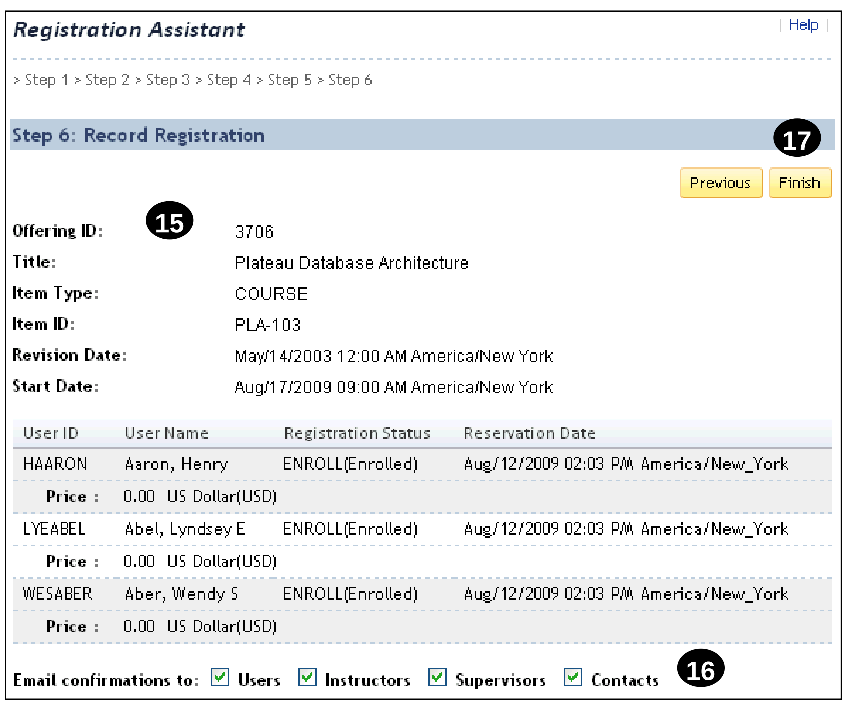


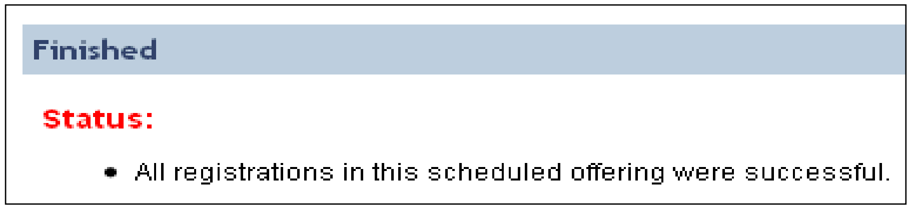
Step 6: Record Registration of the Registration Assistant displays.

15 Review information.

16 Select applicable email confirmation options.

17 Click **Finish**.



Use Registration Assistant to Register Users in a Scheduled Offering, Continued		
	A confirmation status notification displays.	

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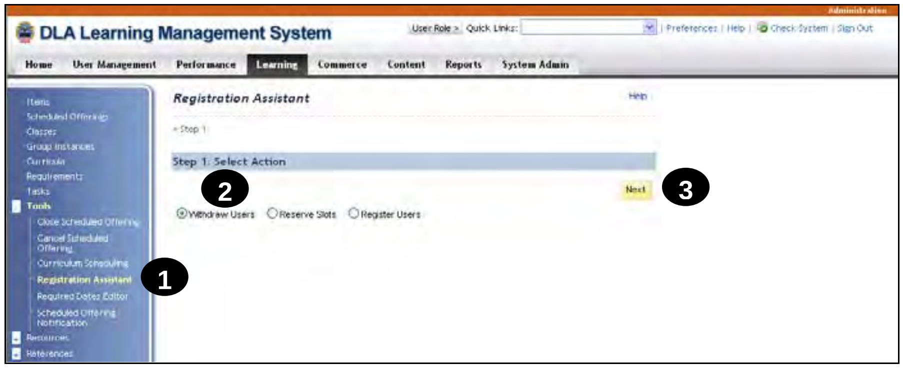
Use Registration Assistant to Withdraw Users from a Scheduled Offering

1 Navigate to **Learning > Tools > Registration Assistant**.

Step 1: Select Action of the Registration Assistant displays.

2 Select **Withdraw Users**.

3 Click **Next**.



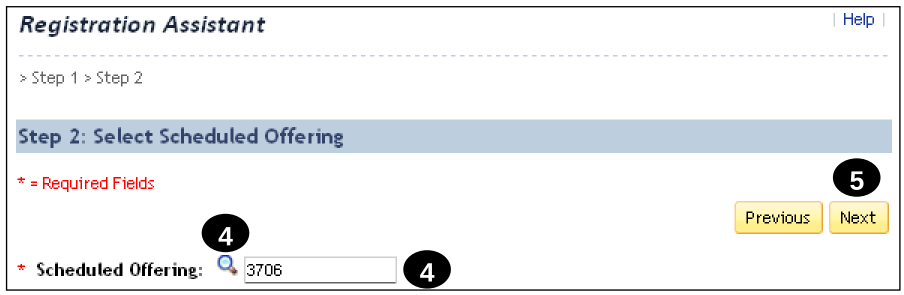
Step 2: Select Scheduled Offering of the Registration Assistant displays.

4 Enter scheduled offering ID.

or

4 Select the **search icon** to search for and select a scheduled offering.

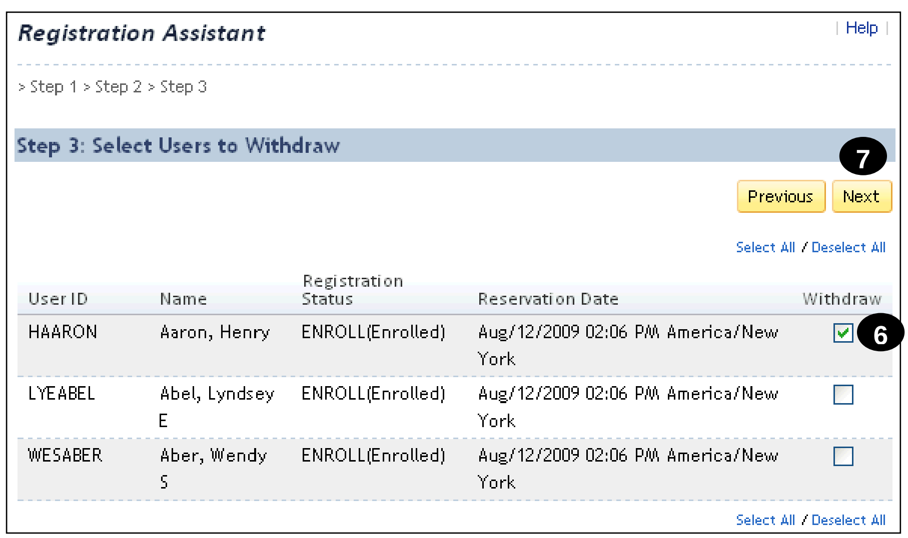
5 Click **Next**.



Step 3: Select Users to Withdraw of the Registration Assistant displays.

6 Click **Withdraw** checkbox for users you wish to withdraw from scheduled offering.

7 Click **Next**.

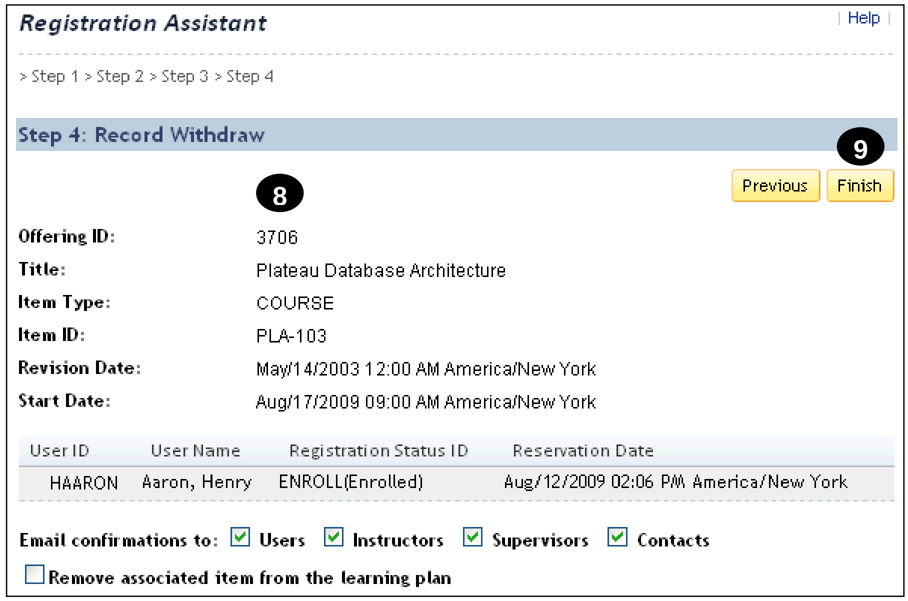


Use Registration Assistant to Withdraw Users from a Scheduled Offering, Continued

Step 4: Record Withdraw of the Registration Assistant displays.

8 Review information on user to be withdrawn.

9 Click **Finish**.



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Use Registration Assistant to Add Slots in a Scheduled Offering

1 Navigate to **Learning > Tools > Registration Assistant**.

2 Select **Reserve Slots**.

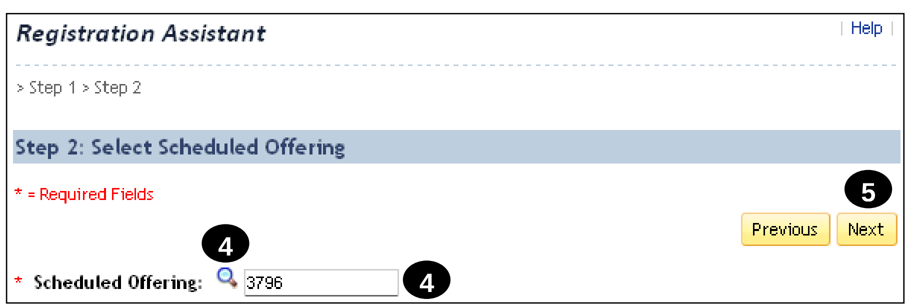
3 Click **Next**.

4 Enter scheduled offering ID.

or

4 Select the **search icon** to search for and select a scheduled offering.

5 Click **Next**.



Use Registration Assistant to Add Slots in a Scheduled Offering, Continued

6 Enter Organization ID for whom the slots are being reserved.

or

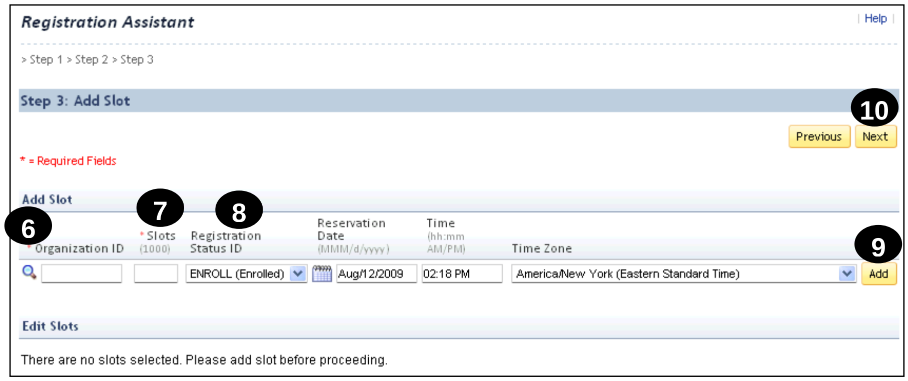
6 Select the **search icon** to search for and select an Organization ID.

7 Enter number of slots.

8 Select **Registration Status ID** from drop-down menu.

9 Click **Add**.

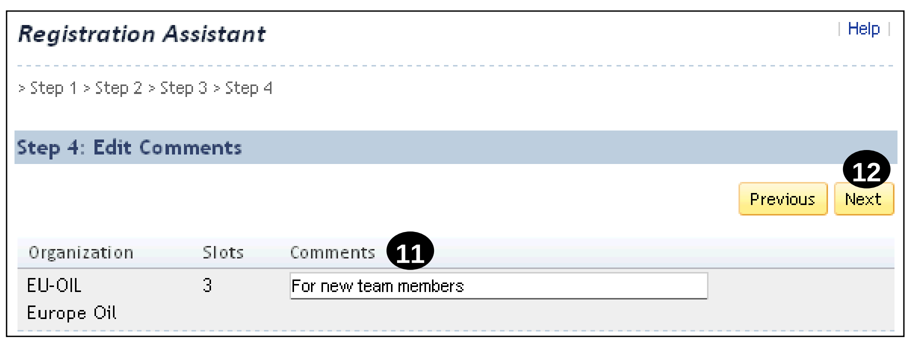
10 Click **Next**.



Note: Reservation Date and Time will default to current date and time; and Time Zone will default to your administrator time zone setting.

11 Enter any comments as necessary.

12 Click **Next**.



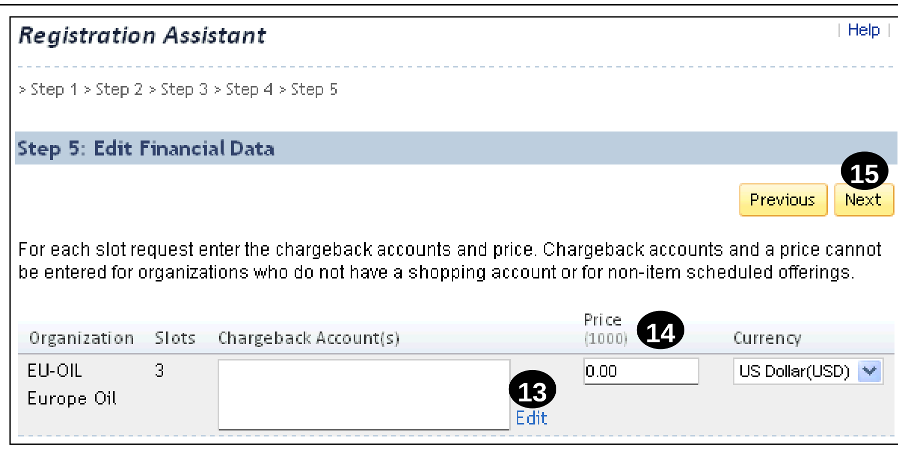
Skip to Step 15 if no financial data is necessary.

13 Click the **Edit** link to select and enter one or more Chargeback Account.

14 Enter price.

15 Click **Next**.

Note: No financial data is tied to organizations in the LMS at this time, so no data entry is required.

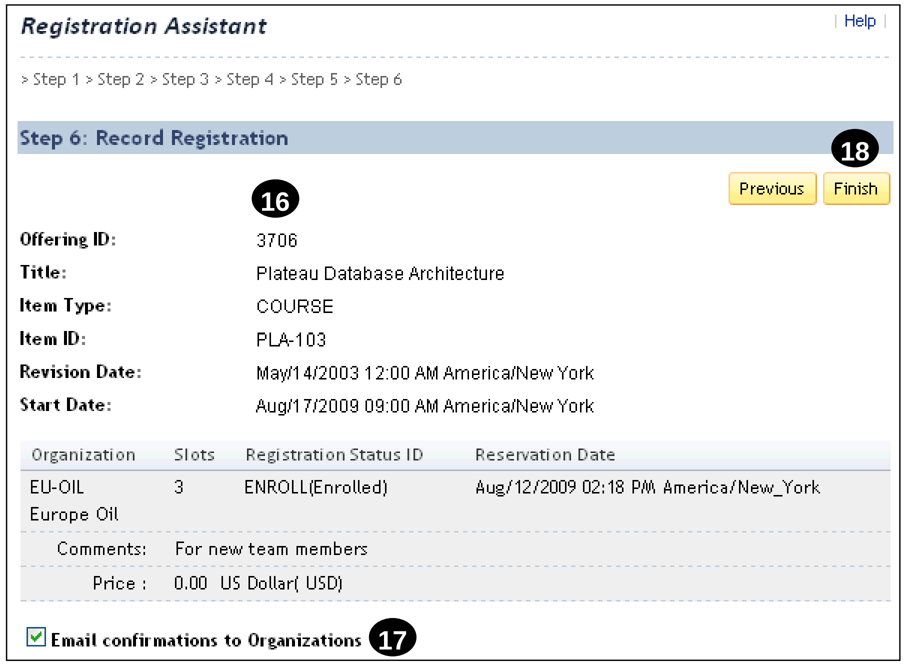


Use Registration Assistant to Add Slots in a Scheduled Offering, Continued

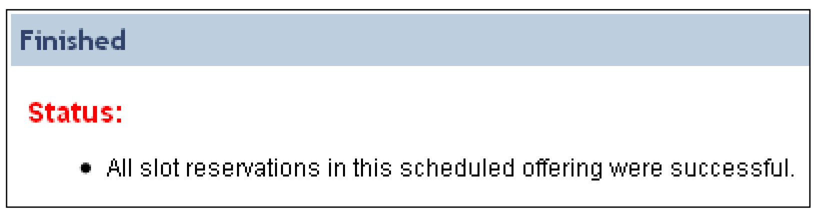
16 Review information.

17 Select email confirmation option.

18 Click **Finish**.



A confirmation status notification displays.



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Record Learning

Description

The purpose of this job aid is to guide administrators through the step-by-step process of using the Learning Event Recorder. Related terminology is provided.

Tasks

- Use Learning Event Recorder to Record Completion of Item
- Use Learning Event Recorder to Record Completion of Scheduled Offering
- View User Learning History tab

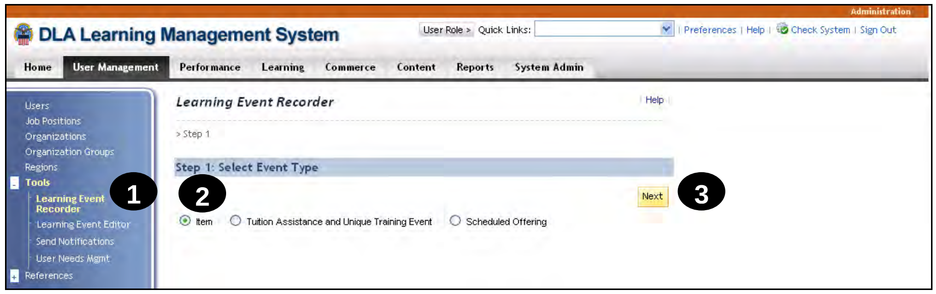
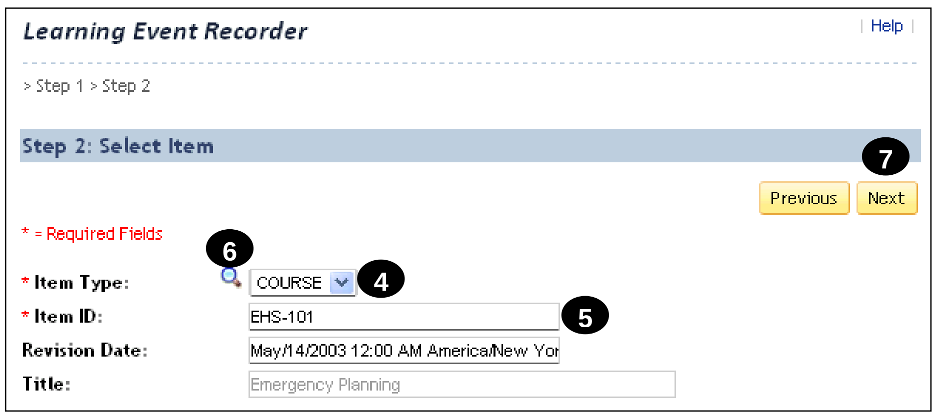
Terminology:

Learning Event: A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- A record of the attendance or completion of any external event that is considered important enough to document but not related directly to learning needs

Types of Learning

- **Item Based Events:** Items are the primary events found in the list of learning events for users. Learning events for items include those created as scheduled offerings and those with online content where the system records the learning event when the user completes the content. All items may have a learning event recorded against them for any user, even if the item was not a part of his/her Learning Plan.
- **Tuition Assistance and Unique Training Requests:** These training events are not recorded by administrators and therefore not described in this document.
- **Scheduled Offering:** An item or learning event with a scheduled date and time.

Use Learning Event Recorder to Record Completion of Item		
1	Navigate to **User Management > Tools > Learning Event Recorder**. *Step 1: Select Event Type* of the Learning Event Recorder wizard displays.	 Note: This option is usually used when an item has not been scheduled or is classified as "Other."
2	Select the **Item** option.	
3	Click **Next**.	
	Step 2: Select Item of the Learning Event Recorder wizard displays.	 Note: By selecting to search for an item, all relevant information will be auto-populated into the fields.
4	Select the item type from the drop-down menu.	
5	Enter the Item ID in the textbox exactly. or	
6	Click the **select icon** to search for an item.	
7	Click **Next**.	

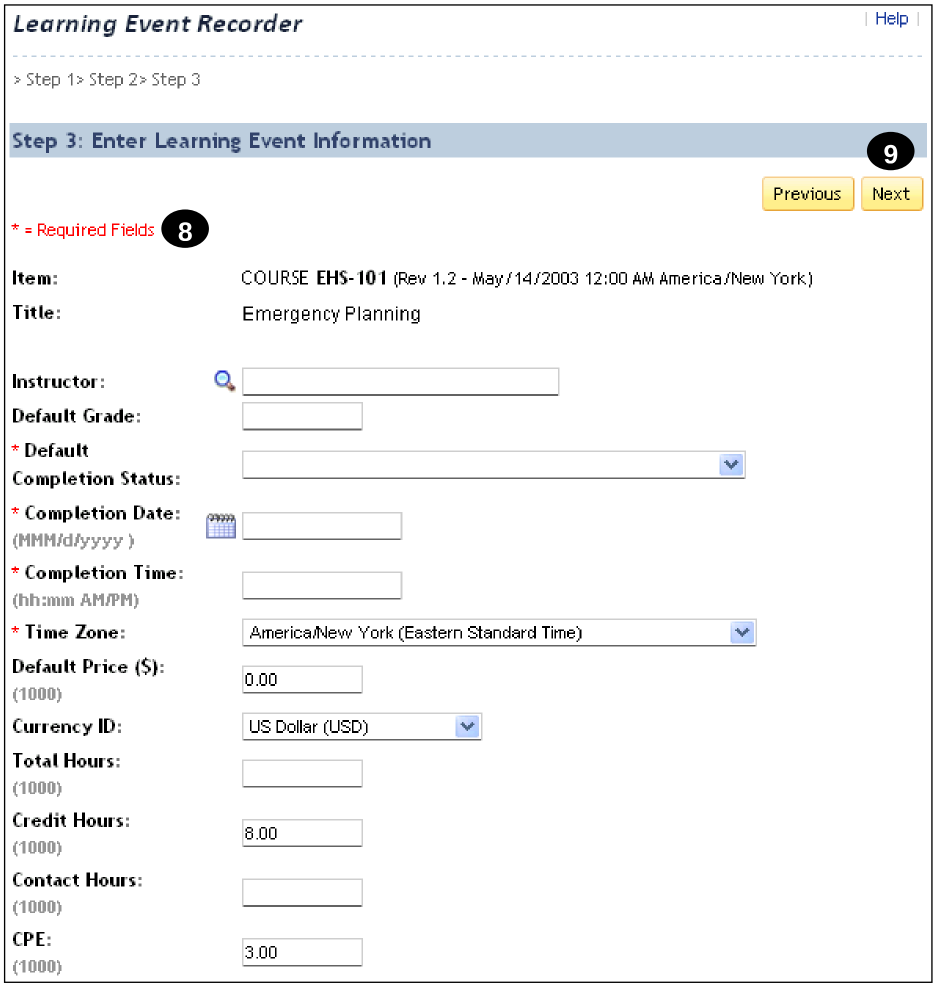
Use Learning Event Recorder to Record Completion of Item, Continued

Step 3: Enter Learning Event Information of the Learning Event Recorder wizard displays.

8 Complete all required data fields (*) within the system.

9 Click **Next**.

Note: Search for and select the instructor or type in the instructor's name in the Instructor field to insert the instructor's name on the user's completion certificate.



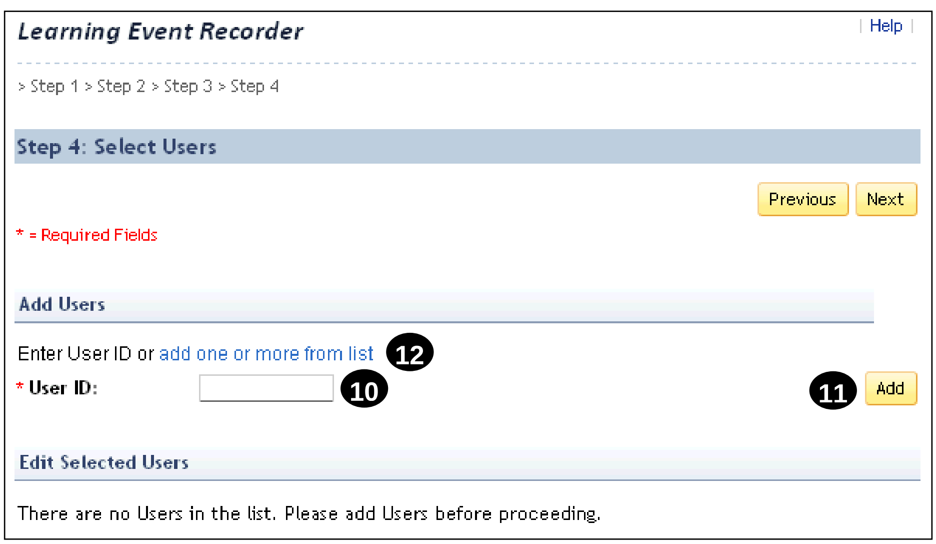
Step 4: Select Users of the Learning Event Recorder wizard displays.

10 Enter a User ID exactly.

11 Click **Add**.

or

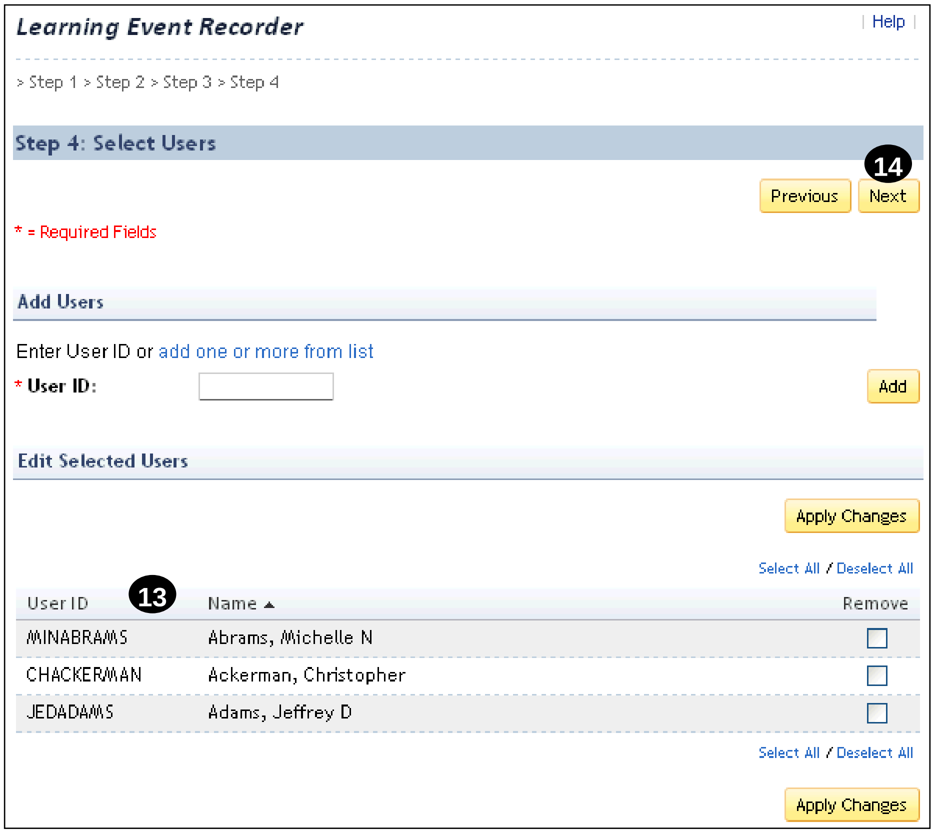
12 Click the **add one or more from list** link to search for and select one or more users.



Use Learning Event Recorder to Record Completion of Item, Continued

13 Once all users have been added, confirm list.

14 Click **Next.**



Step 5: Edit User Event Information of the Learning Event Recorder wizard displays.

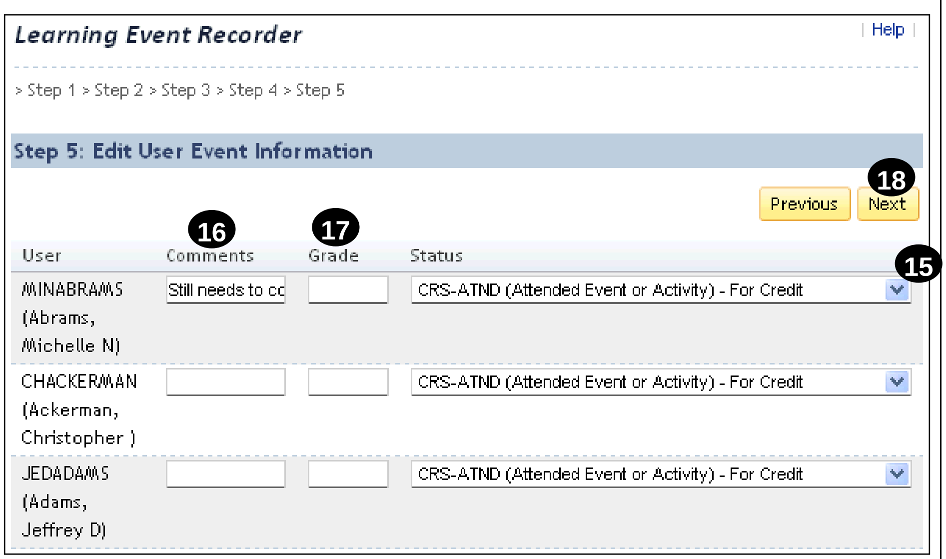
The status and grade selected at *Step 3: Enter Learning Event Information* are applied to all users.

15 Select an option in the drop-down menu to adjust a user's status.

16 Enter comments (optional).

17 Enter or adjust grade (optional).

18 Click **Next.**



Note: Any comments entered will appear on a Learning History report.

Use Learning Event Recorder to Record Completion of Item, Continued

Step 6: Edit User Event Financial Information of the Learning Event Recorder wizard displays.

19 Enter any relevant financial information about the learning event.

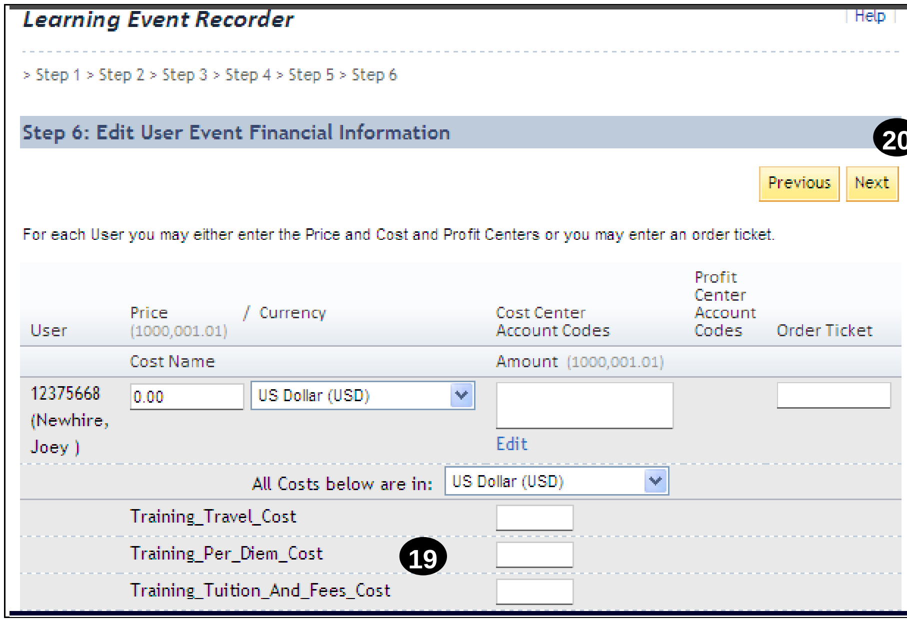
Note: If there is no financial information to enter click **Next** to proceed.

20 Click **Next**.

Note: If you enter a price, you must also enter a cost center account code in order to proceed. In most instances, clear the price from the Price column and clear the account code from the Account Code column.

Record any financial data in the

- Training_ Travel_Cost,
- Training_Per_Diem_ Cost, and
- Training _Tuition _And_Fees_Cost fields.



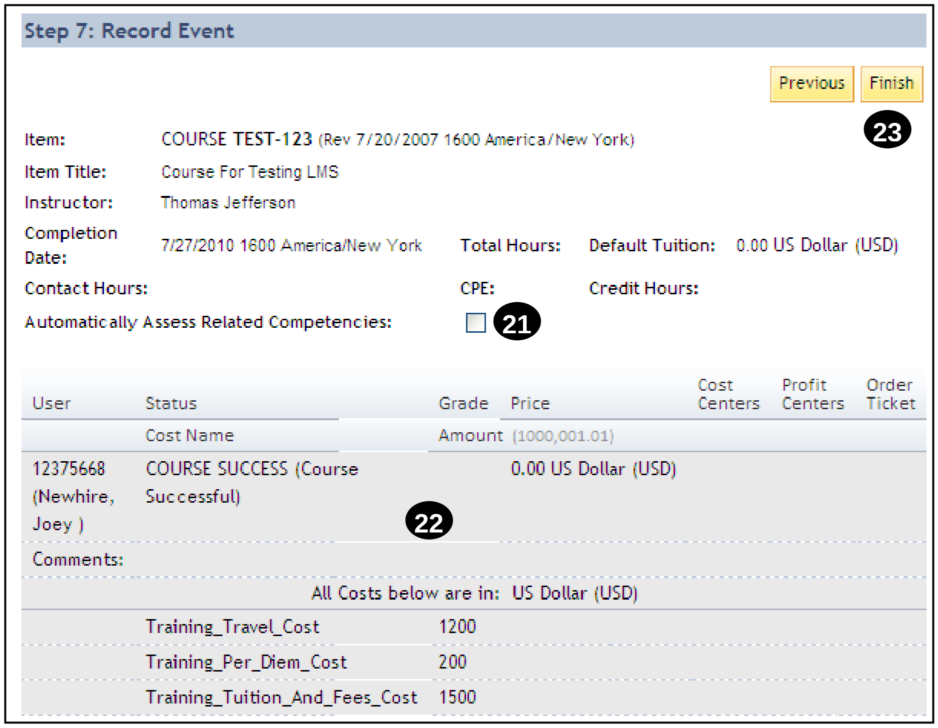
Use Learning Event Recorder to Record Completion of Item, Continued

Step 7: Record Event of the Learning Event Recorder wizard displays.

21 If competencies need to be assessed as a result of recording the learning event, select the **Automatically Assess Related Competencies** checkbox.

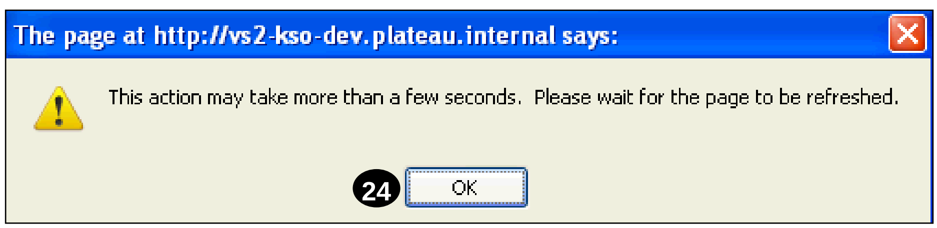
22 Review learning event information.

23 Click **Finish**.



A pop-up may appear requesting that the page refresh before you proceed.

24 Click **OK**.



Use Learning Event Recorder to Record Completion of Item, Continued

	The application provides a status to let you know that the learning event has been recorded successfully.	 Note: The user whose status was changed to 'No Credit' does not appear in the list of users to generate completion certificates.
25	Click **Print** to print a completion certificate report for each user listed.	
26	Click **Email...** to email a completion certificate report to each user listed.	
27	Click **Start Over...** to begin the Learning Event Recorder process again. This retains all users previously selected.	

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Use Learning Event Recorder to Record Completion of Scheduled Offering

1	Navigate to **User Management > Tools > Learning Event Recorder**. *Step 1: Select Event Type* of the Learning Event Recorder wizard displays.	 Note: This option is usually used to record completion or attendance for scheduled event.
2	Select the **Scheduled Offering** option.	
3	Click **Next**.	

<table>
<tr><th colspan="3">Use Learning Event Recorder to Record Completion of Scheduled Offering</th></tr>
<tr>
<td>

4

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6</td>
<td>

Step 2: Select Scheduled Offering of the Learning Event Recorder wizard displays.

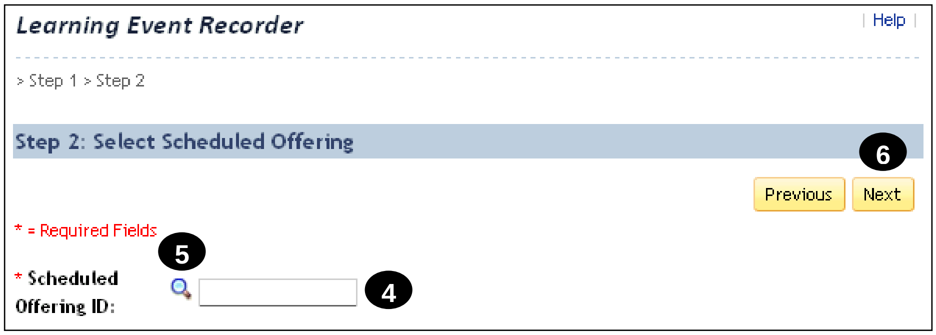
Enter the Scheduled Offering ID in the textbox exactly.

or

Click the **select icon** to search for scheduled offering.

Click **Next**.

</td>
<td>



Note: If you search for a scheduled offering, the search screen defaults to search for all offerings prior to today's date.

</td>
</tr>
<tr>
<td>

7

8</td>
<td>

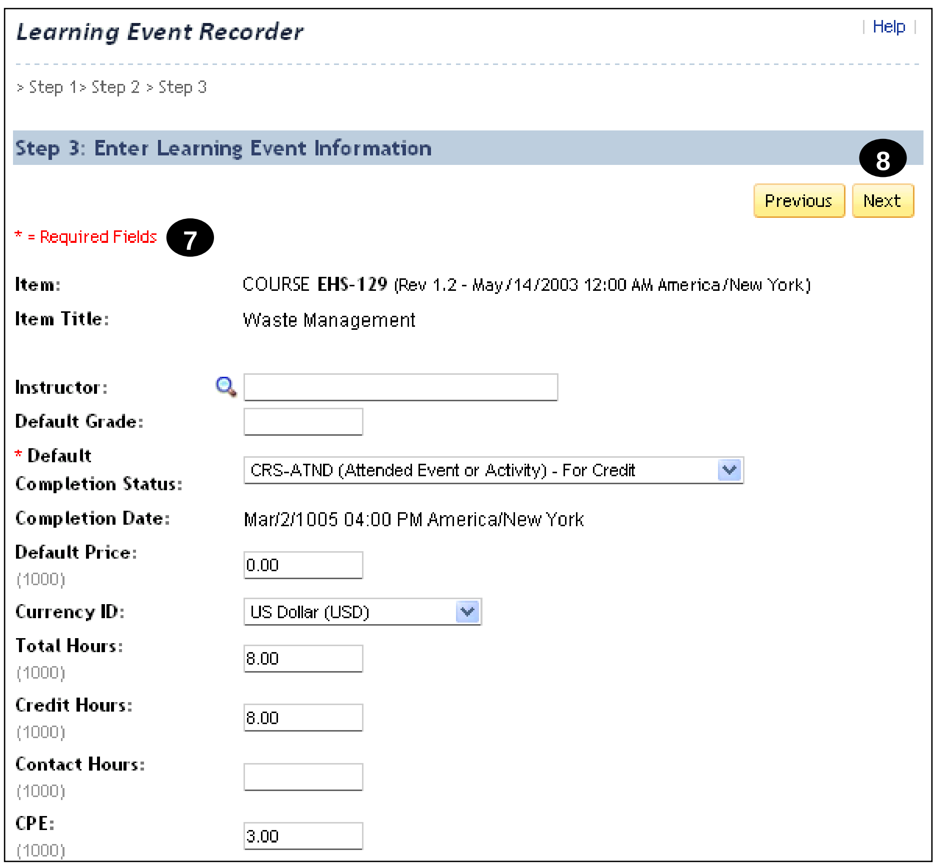
Step 3: Enter Learning Event Information of the Learning Event Recorder wizard displays.

Complete required data fields (*). Additional information such as total hours, or credit hours, can be entered as well.

Click **Next**.

Note: Search for and select the instructor or type in the instructor's name in the Instructor field to insert the instructor's name on the user's completion certificate.

</td>
<td>



</td>
</tr>
</table>

Use Learning Event Recorder to Record Completion of Scheduled Offering, Continued

9 Review list of selected users (all users already registered into the offering). Remove/add users from this list.

10 To remove a user, check the **Remove** checkbox.

11 Click **Apply Changes**.

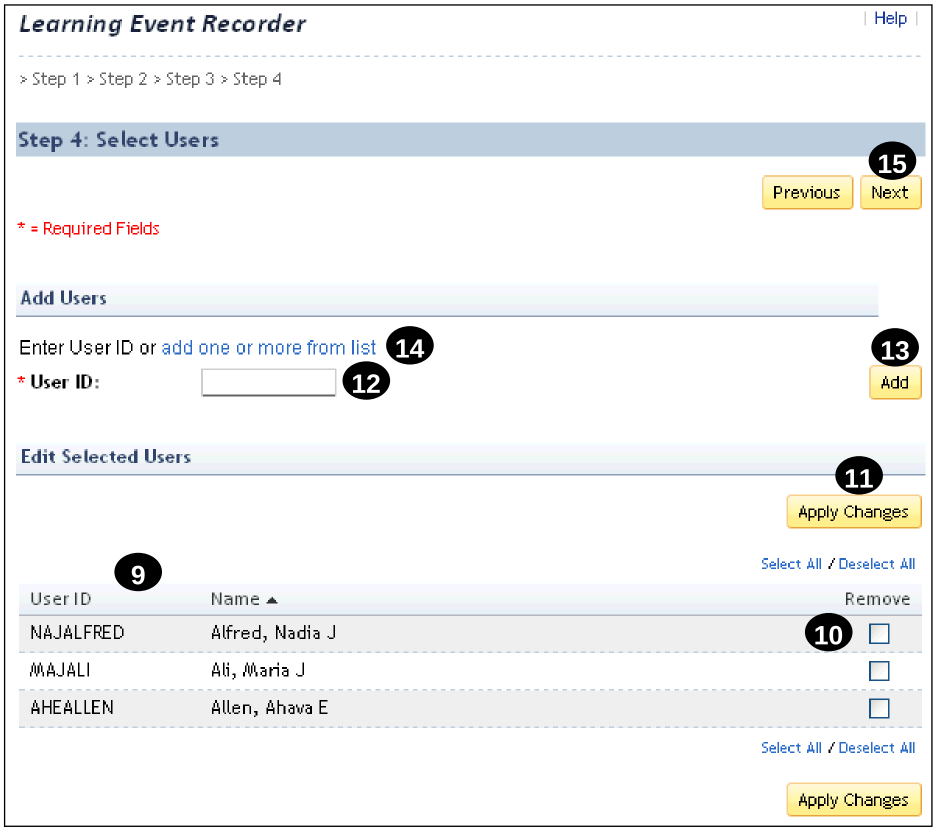
12 To add users, enter a User ID exactly.

13 Click **Add**.

or

14 Click **add one or more from list** to search for and select users.

15 Click **Next.**



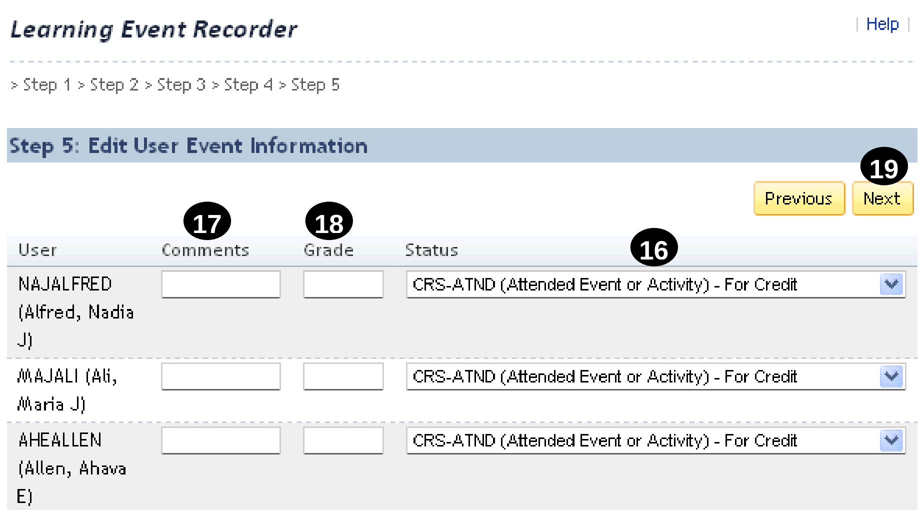
Step 5: Edit User Event Information of the Learning Event Recorder wizard displays.

16 Select an option in the drop-down menu to adjust a user's status.

17 Enter comments (optional).

18 Enter or adjust grade (optional).

19 Click **Next**.



Note: Any comments entered will appear on a Learning History report.

Use Learning Event Recorder to Record Completion of Scheduled Offering, Continued

Step 6: Edit User Event Financial Information of the Learning Event Recorder wizard displays.

20 Enter any relevant financial information about the learning event.

Note: If there is no financial information to enter click **Next** to proceed.

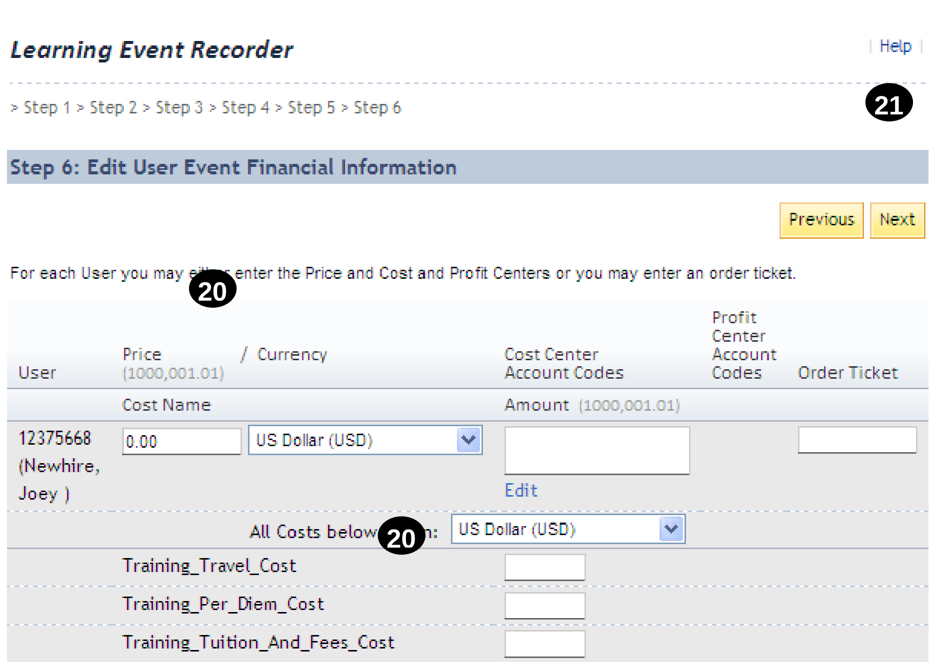
21 Click **Next**.

Note: If you enter a price, you must also enter a cost center account code in order to proceed.

In most instances, clear the price from the Price column and clear the account code from the Account Code column.

Record any financial data in the

- Training_ Travel_Cost
- Training_Per_Diem_ Cost, and
- Training _Tuition _And_Fees_Cost fields.



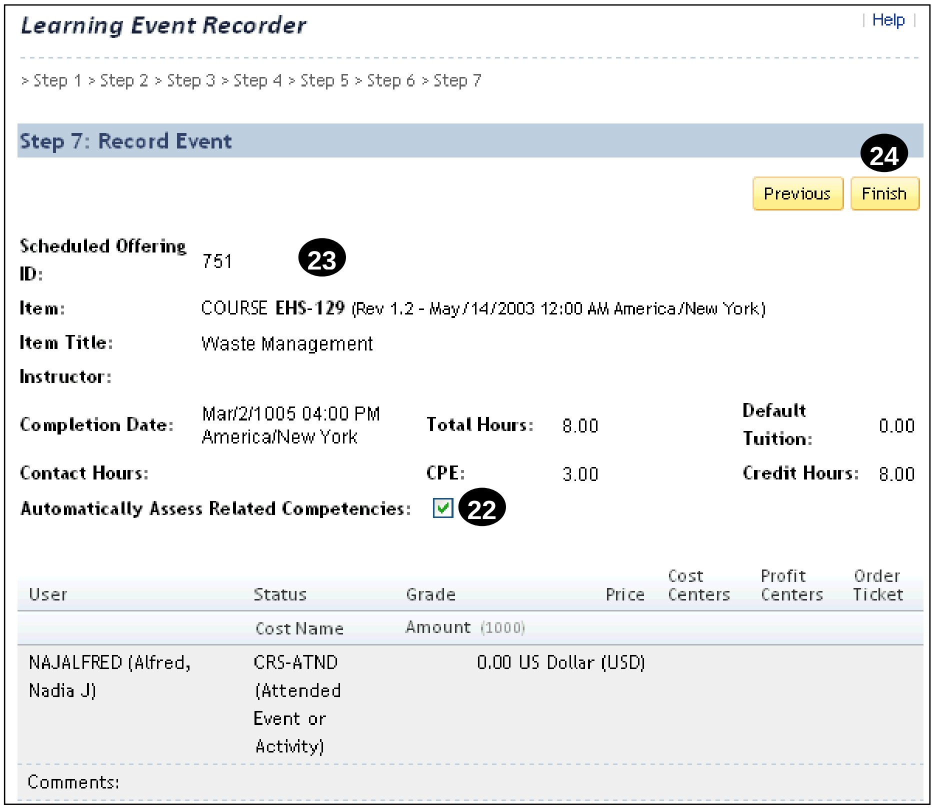
Use Learning Event Recorder to Record Completion of Scheduled Offering, Continued

Step 7: Record Event of the Learning Event Recorder wizard displays.

22 If competencies need to be assessed as a result of recording the learning event, select the **Automatically Assess Related Competencies** checkbox.

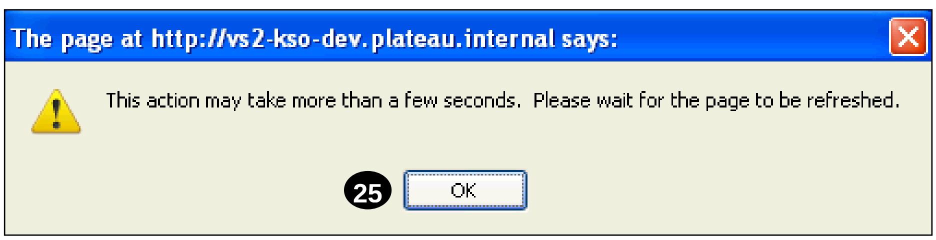
23 Review learning event information.

24 Click **Finish**.



A pop-up may appear requesting that the page refresh before you proceed.

25 Click **OK**.



Use Learning Event Recorder to Record Completion of Scheduled Offering, Continued

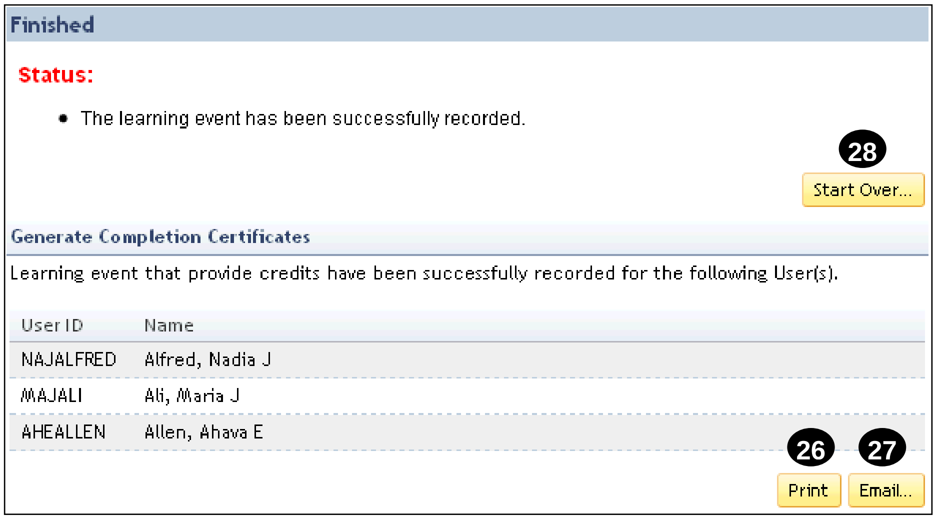
The status is displayed.

26 Click **Print** to print a completion certificate report for each user listed.

27 Click **Email...** to email a completion certificate report to each user listed.

28 Click **Start Over...** to begin the Learning Event Recorder process again. This retains all users previously selected.

Note: Inactivate the Scheduled Offering after you record the completion.



Note: The user whose status was changed to ‘No Credit’ does not appear in the list of users to generate completion certificates.

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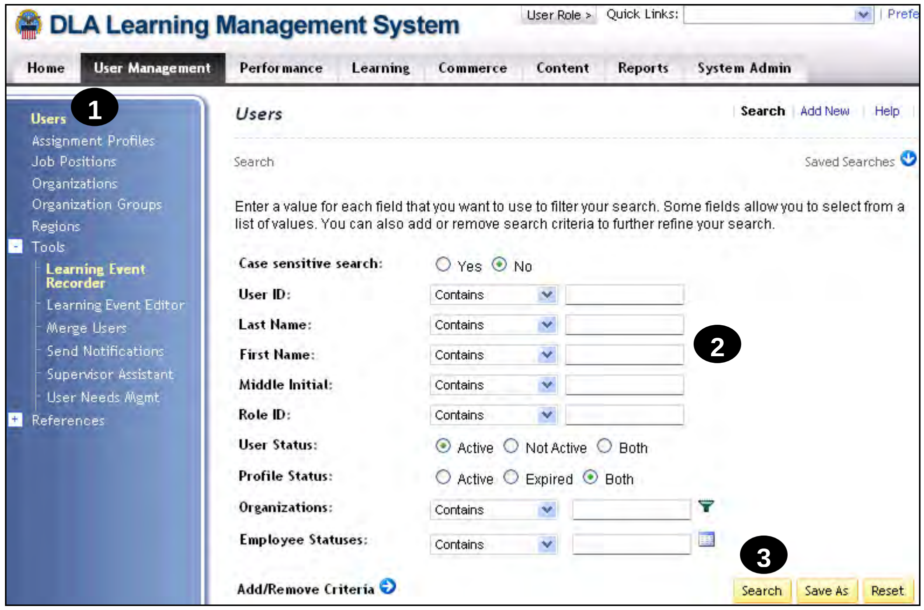
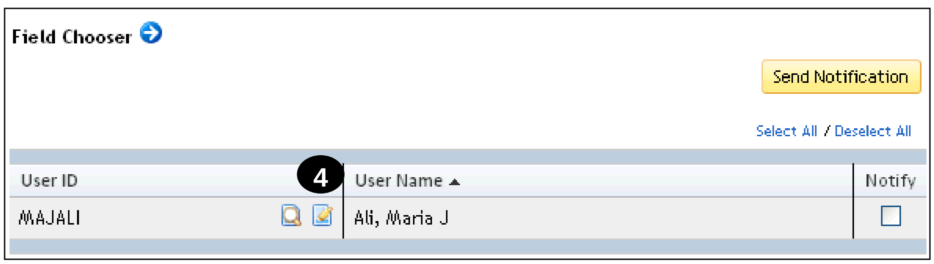
View User Learning History tab

1. Navigate to **User Management > Users**.
2. Enter search criteria to find one of the users for whom you just recorded a completion.
3. Click **Search**.



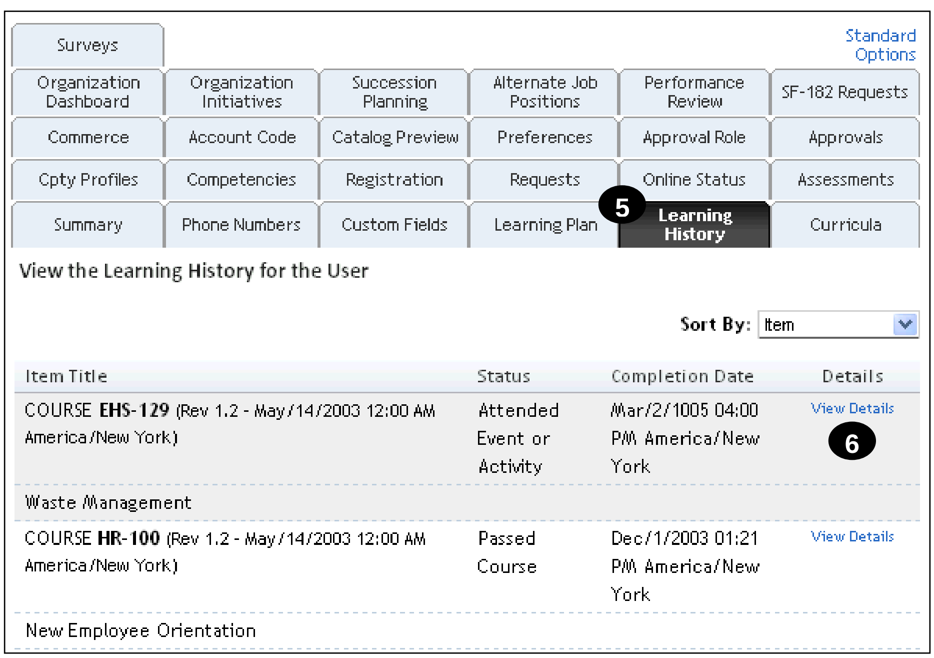
4. Click the **edit icon** to select the user record.



5. Click the **Learning History** tab.

   View learning history.

6. Click the **View Details** link for additional information on the learning event. A separate pop-up window appears.



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Record Learning using Quick Link

Description

The purpose of this job aid is to guide administrators through the step-by-step process of using the Learning Event Recorder Quick Link. Related terminology is provided.
Note: Financial data can't be entered in the system when using Quick Links to record learning.

Tasks

- Use Record Learning Quick Link to Record Completion of Item
- Use Record Learning Quick Link to Record Completion of Scheduled Offering
- View User Learning History Tab

Terminology:

Learning Event: A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- A record of the attendance or completion of any external event that is considered important enough to document but not related directly to learning needs

Types of Learning:

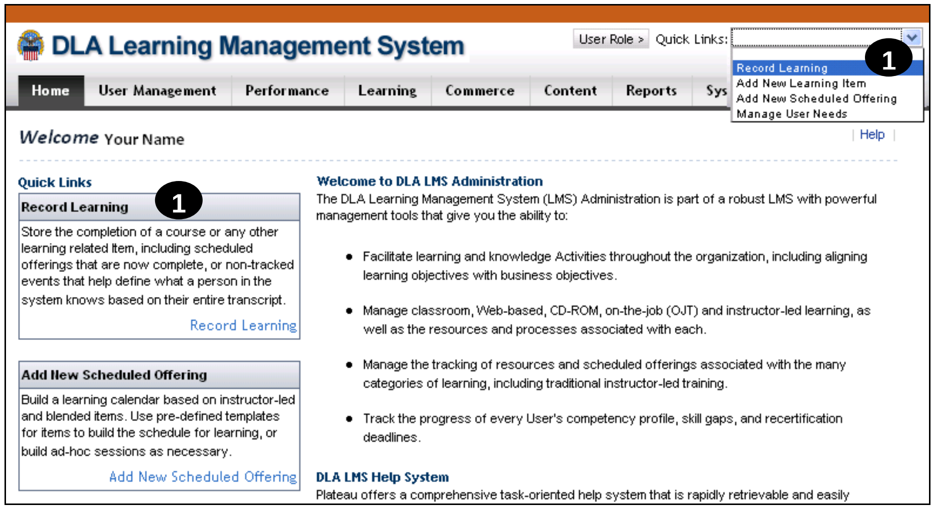
- **Item Based Events:** Items are the primary events found in the list of learning events for users. Learning events for items include those created as scheduled offerings and those with online content where the system records the learning event when the user completes the content. All items may have a learning event recorded against them for any user, even if the item was not a part of his/her Learning Plan.
- **External Events:** A learning activity outside of the organization, such as a college course or a seminar, for which there is no Item record in the DLA LMS, may be recorded in a user's Learning History. This external event allows for a description and comment field to further identify the nature of the training.
- **Scheduled Offering:** An item or learning event with a scheduled date and time.

Use Record Learning Quick Link to Record Completion of Item

1 From the Home page, select Record Learning from the **Quick Links** drop-down menu.

or

1 From the Home page, click the **Record Learning** link.



The *Initial Information* page of the Record Learning wizard displays.

2 Select the **Item** option.

3 Click the **search icon** to search for and add one or more items.

4 Click the **search icon** to search for and add one or more users.

5 Click **Next**.

Note: This option is usually used when an item has not been scheduled or is classified as “Other.”

Use Record Learning Quick Link to Record Completion of Item, Continued

The *Edit Details* page of the Record Learning wizard displays.

6 Enter completion date, time, time zone, and grade / completion status for each item (to be applied to all users).

Note: Total hours, credit hours, contact hours, and CPE hours may also be entered.

7 Click **Apply Changes**.

8 To modify individual user records, click the **expand icon** ⊞ next to the item ID to view all users.

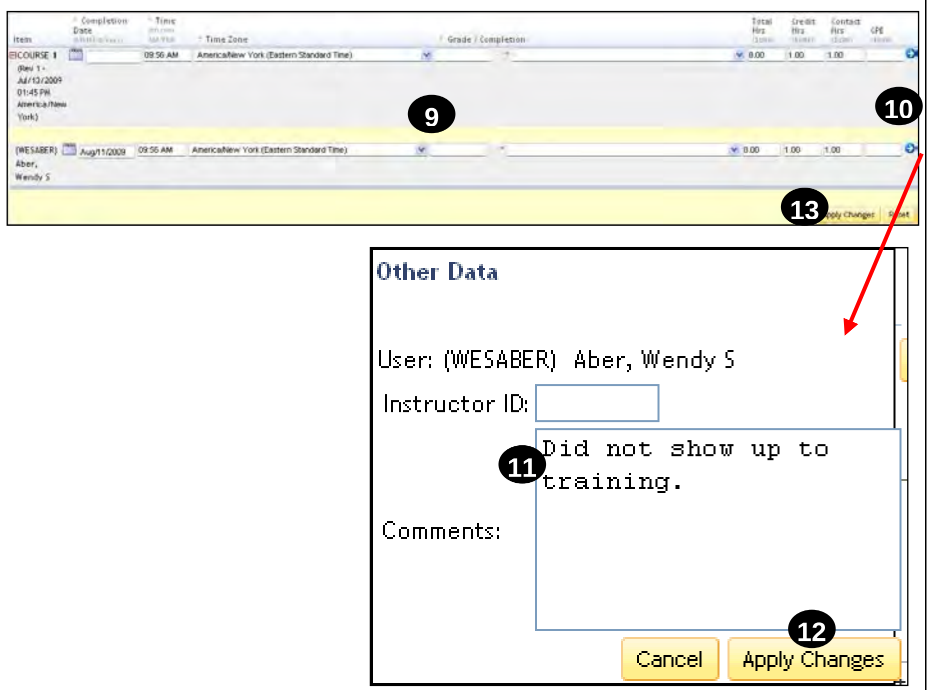
9 Modify individual user records by selecting options from the drop-down menus, or modifying hour fields.

10 Click the **More Options icon** to enter additional information for each user, such as comments.

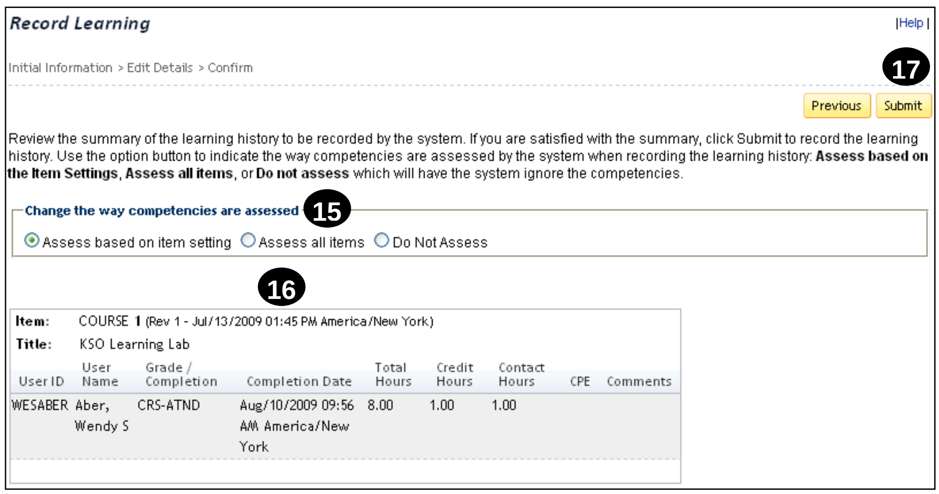
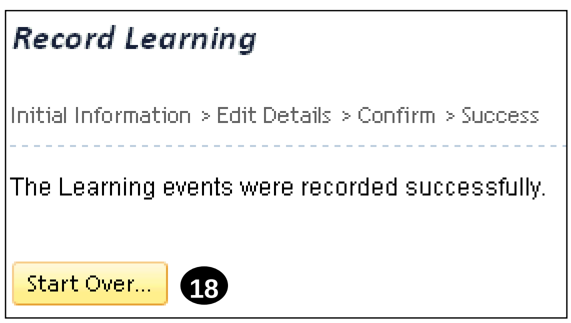
11 Enter comments if appropriate.

12 Click **Apply Changes** to close the Other Data pop-up box.

13 Click **Apply Changes** in the expanded view to save individual record changes.



Note: Any comments entered here displays on a Learning History report.

Use Record Learning Quick Link to Record Completion of Item, Continued		
14	Click **Next**.	
	The *Confirm* page of the Record Learning wizard displays.	
15	If applicable, select an option for competency assessment.	
16	Review list of items and users effected.	
17	Click **Submit**.	
	Confirmation/success status is displayed.	
18	Click **Start Over...** to record additional learning events. Note: Clicking **Start Over...** initiates the record learning process again using the same users selected in the previous process.	

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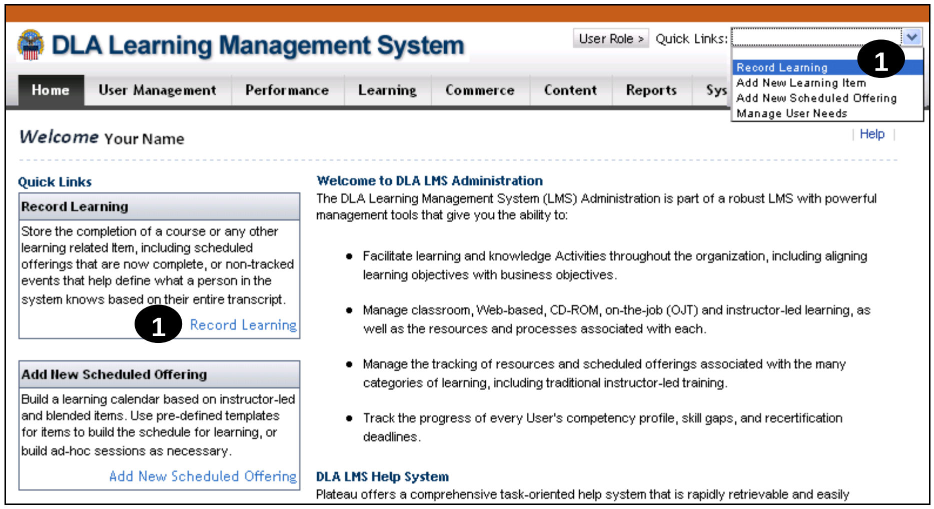
Use Record Learning Quick Link to Record Completion of Scheduled Offering

1 From the **Home** page, select **Record Learning** from the **Quick Links** drop-down menu.

or

1 From the **Home** page, click the **Record Learning** link.



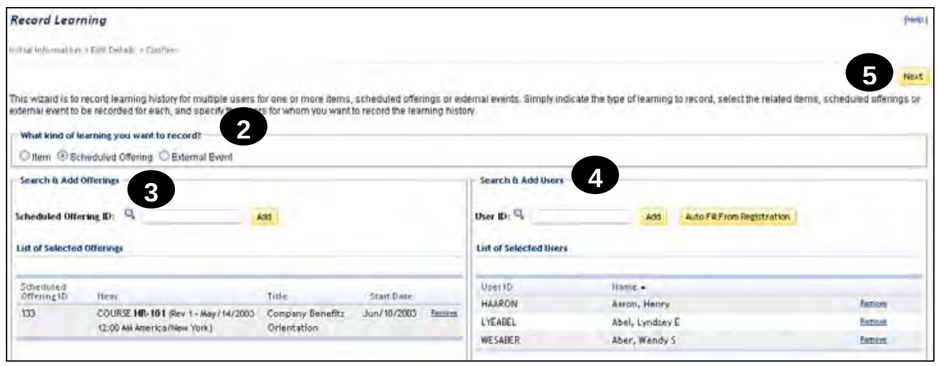
The *Initial Information* page of the Record Learning wizard displays.

2 Select the **Scheduled Offering** option.

3 Click the **search icon** to search for and add one or more scheduled offerings.

4 Click the **search icon** to search for and add one or more users.

5 Click **Next**.



Note: This option is usually used to record completion or attendance for scheduled event.

Use Record Learning Quick Link to Record Completion of Scheduled Offering

The *Edit Details* page of the Record Learning wizard displays.

6 Enter completion status/grade for each scheduled offering (to be applied to all users).

Note: Total hours, credit hours, contact hours, and CPE hours may also be entered.

7 Click **Apply Changes**.

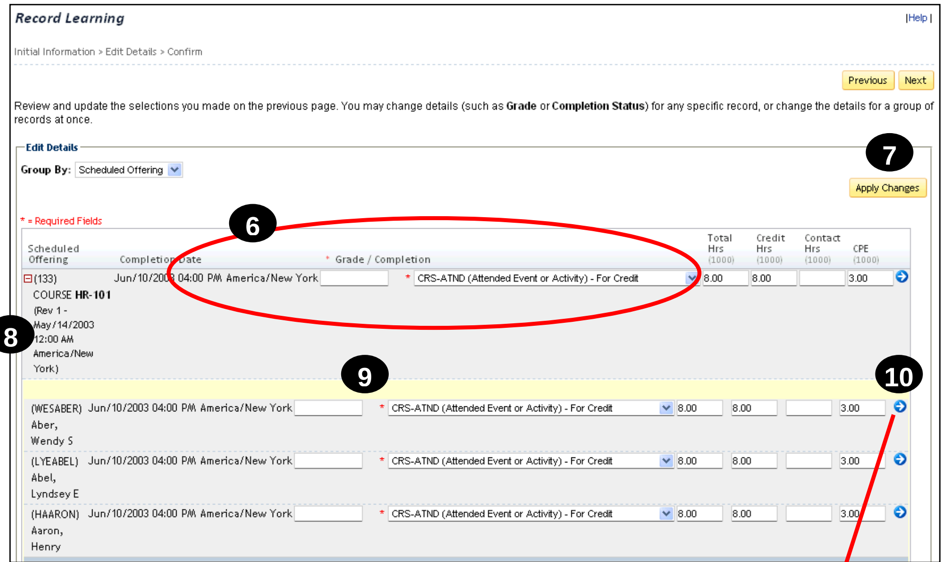
8 To modify individual user records, click the **expand icon** ⊞ next to the item ID to view all users.

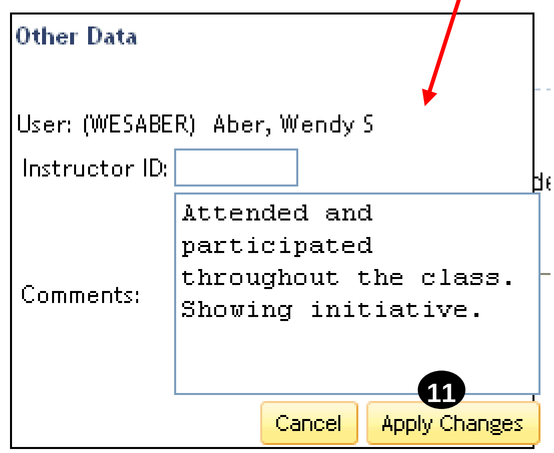
9 Modify individual user records by selecting options from the drop-down menus, or modifying hour fields.

10 Click the **More Options icon** to enter additional information for each user, such as comments.

11 Click **Apply Changes** to close the Other Data pop-up box.

Click **Apply Changes** (as in Step 7) in the expanded view to save individual record changes.





Note: Any comments entered displays on a Learning History report.

Use Record Learning Quick Link to Record Completion of Scheduled Offering, Continued

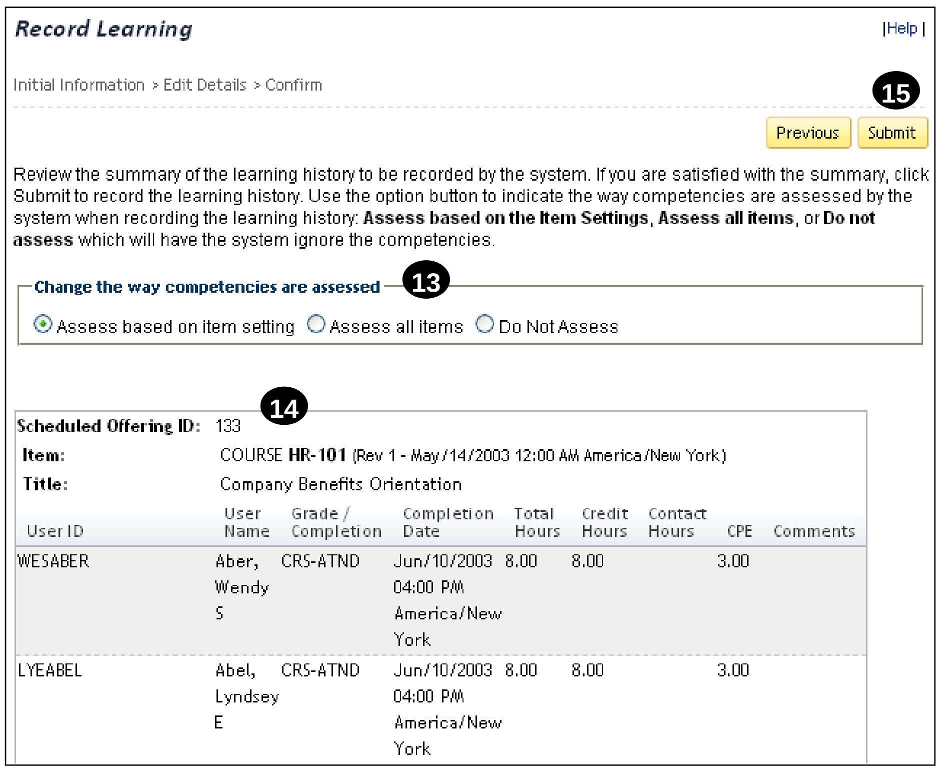
12 Click **Next**.

The *Confirm* page of the Record Learning wizard displays.

13 If applicable, select an option for competency assessment.

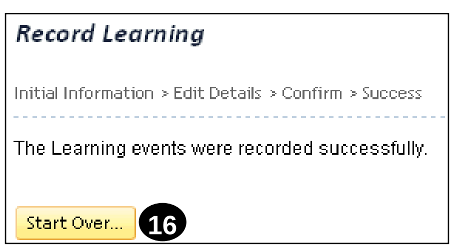
14 Review list of scheduled offerings and users effected.

15 Click **Submit**.



Confirmation/success status is displayed.

16 Click **Start Over…** to record additional learning events.



Note: Clicking **Start Over…** initiates the record learning process again using the same users selected in the previous process.

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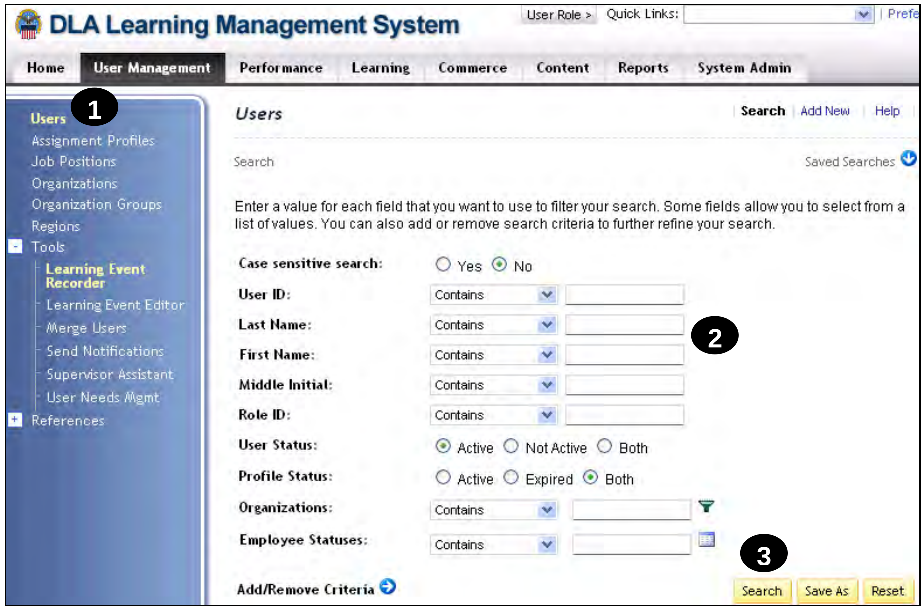
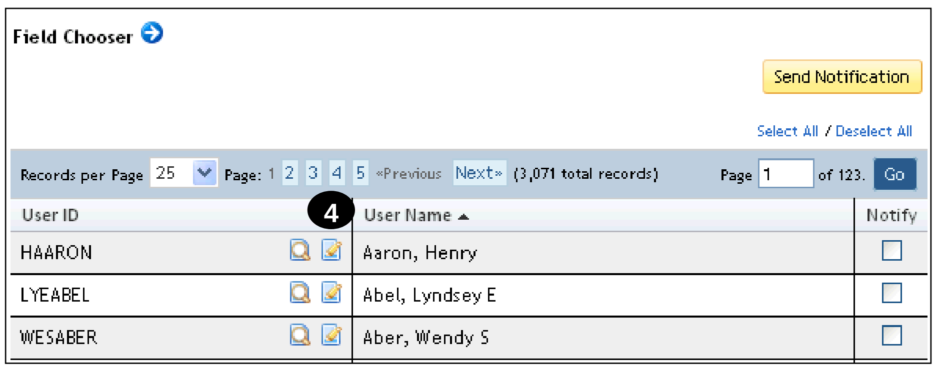
View User Learning History tab

1. Navigate to **User Management > Users**.
2. Enter search criteria to find one of the users for whom you just recorded a completion.
3. Click **Search**.



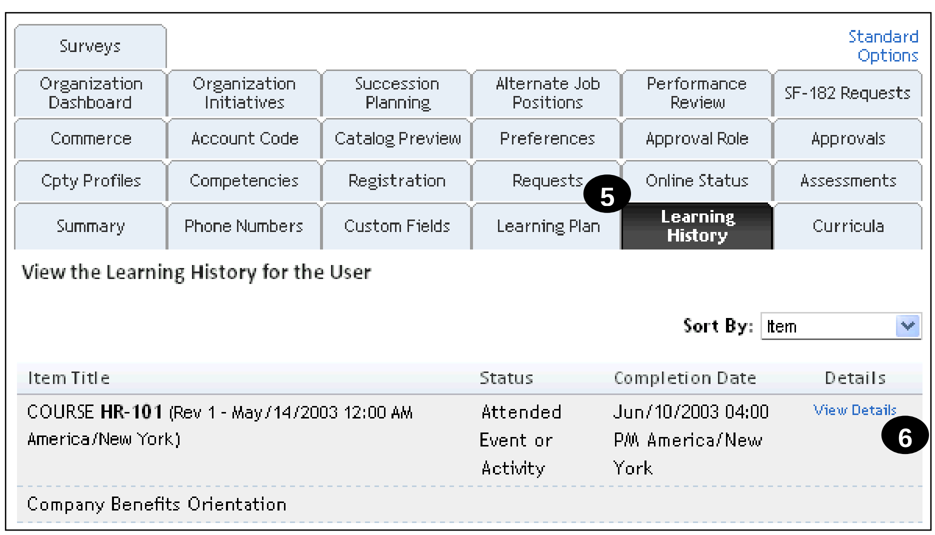
4. Click the **edit icon** to select the user record.



5. Click the **Learning History** tab.

   View learning history.

6. Click the **View Details** link to view additional information on the learning event in a separate pop-up window.



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Send Notifications

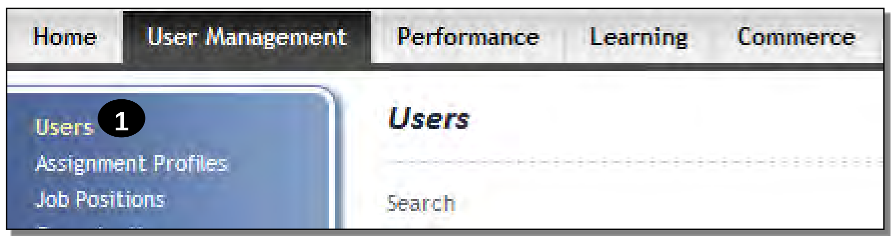
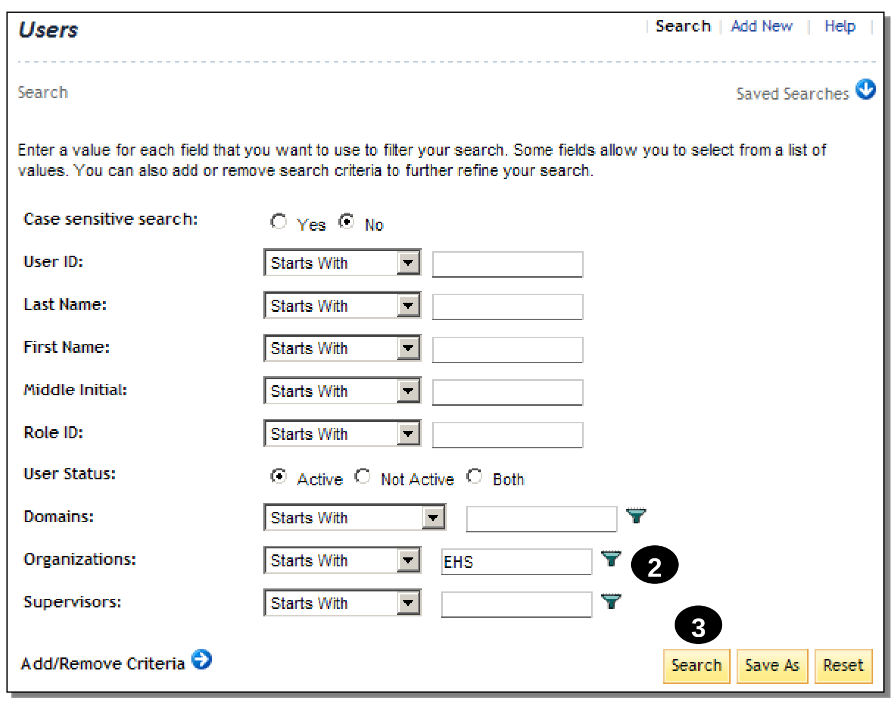
Description

The purpose of this job aid is to guide administrators through the step-by-step process of creating and sending notifications.

Tasks

- Create and Send Ad-hoc Notifications from User Search Results
- Create and Send Notifications Using Send Notifications Tool

Create and Send Ad-hoc Notifications from User Search Results

1	Navigate to **User Management > Users**.	
	Search for a user by entering criteria for one or more fields. For this example, let's search for all users within a specific organization.	
2	Enter the organization ID in the Organizations field.	
3	Click **Search**.	

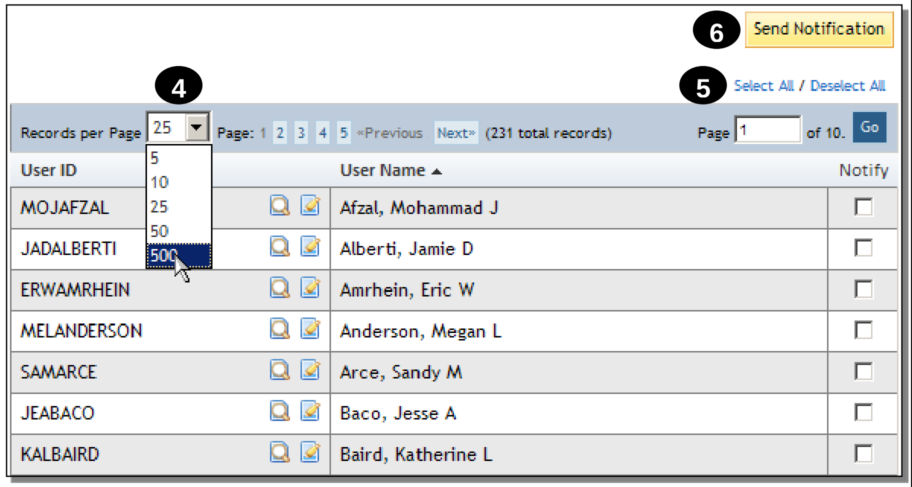
Create and Send Ad-hoc Notifications from User Search Results, Continued

The results display all the records that meet the entered criteria.

4 If you want to send a notification to all members of this organization, change the view per page to **500** or **All**.

5 Click the **Select All** link to select all users.

6 Click **Send Notification**.



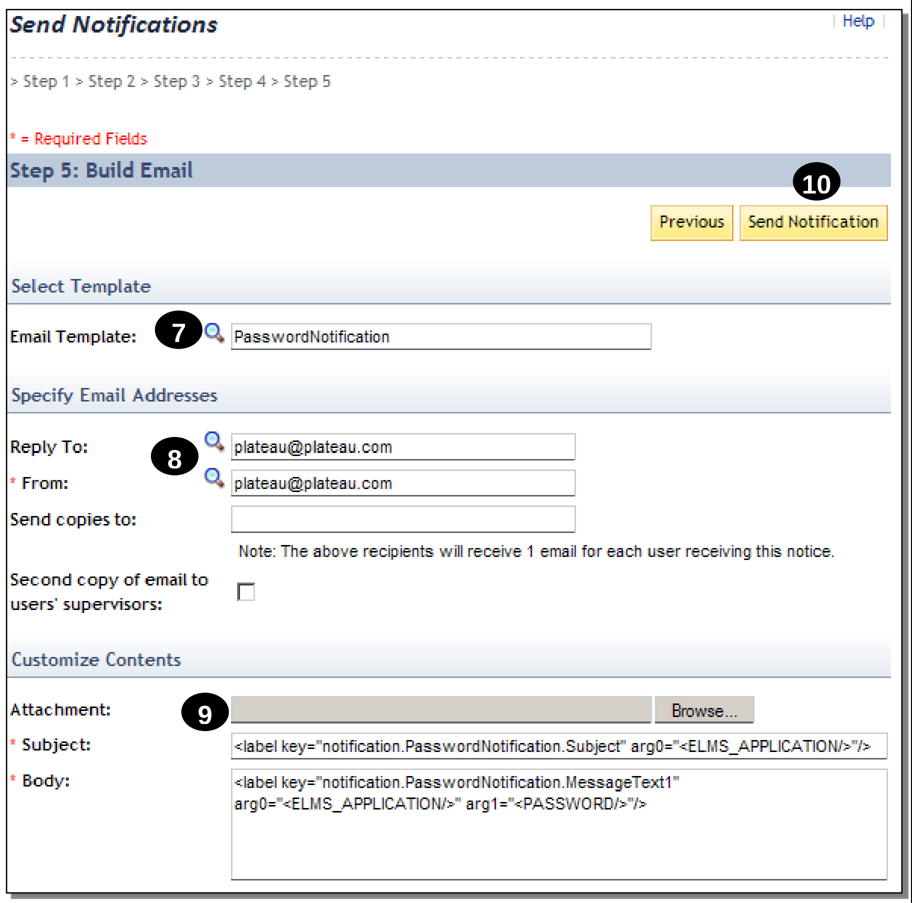
Step 5: Build Email of the Send Notifications wizard displays.

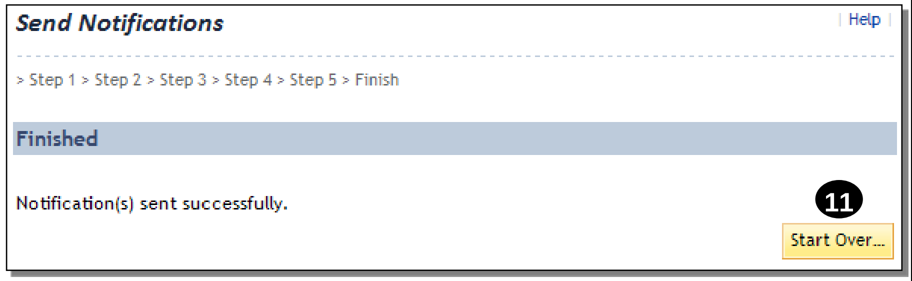
7 Click the **select icon** to select an email template.

8 Select a Reply To and From email address.

9 Contents of the message can be customized by making any necessary edits to the subject and body of the message as well as adding an attachment.

10 Click **Send Notification**.



Create and Send Ad-hoc Notifications from User Search Results, Continued		
	You have successfully sent a notification to all selected users.	
11	Click the **Start Over…** button to send additional notifications to a user population based on scheduled offering, item, curriculum, or class.	

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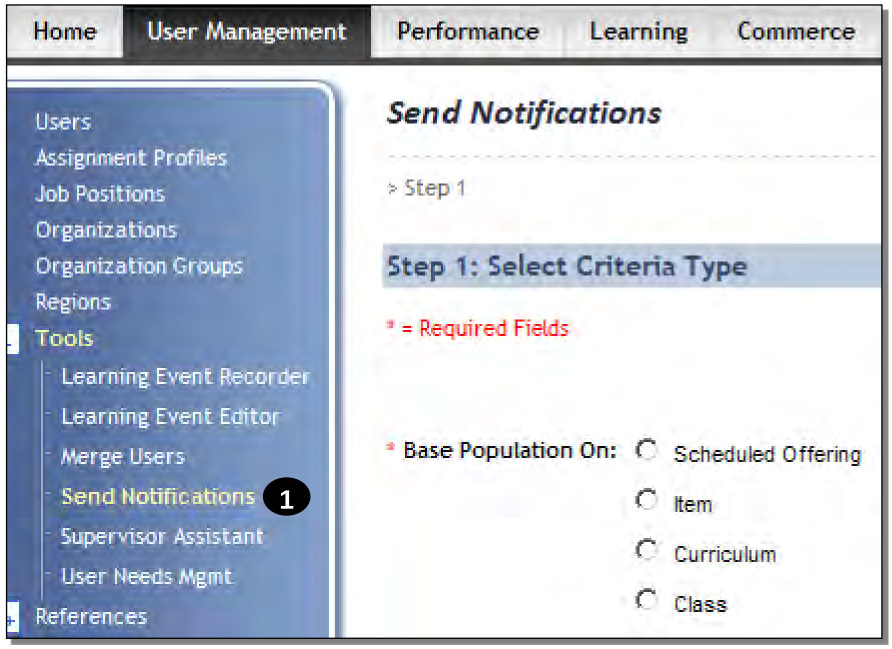
<table>
<tr><th colspan="3">Create and Send Notifications Using Send Notifications Tool</th></tr>
<tr><td>1</td><td>Navigate to User Management > Tools > Send Notifications.</td><td>


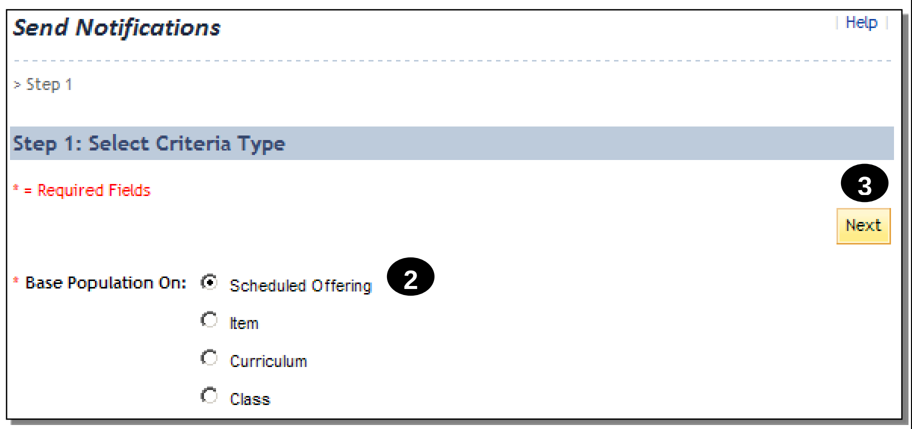
</td></tr>
<tr><td>

2

3</td><td>Step 1: Select Criteria Type of the Send Notifications wizard displays.

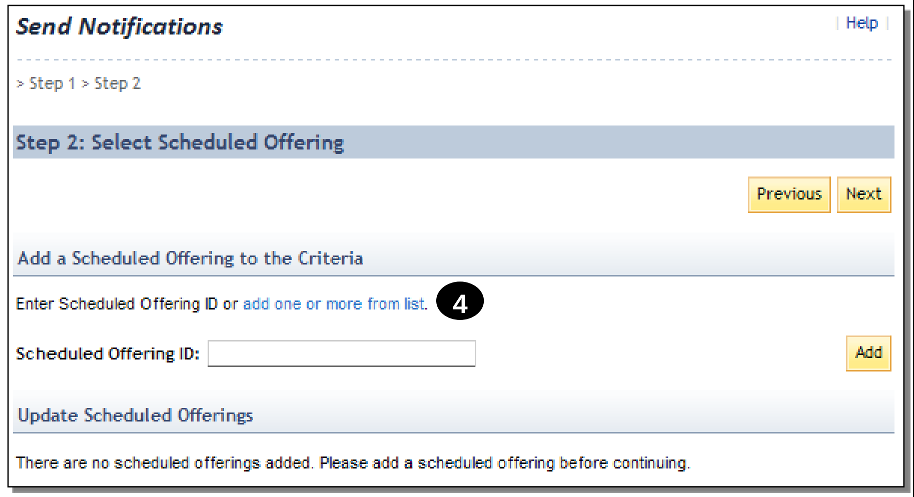
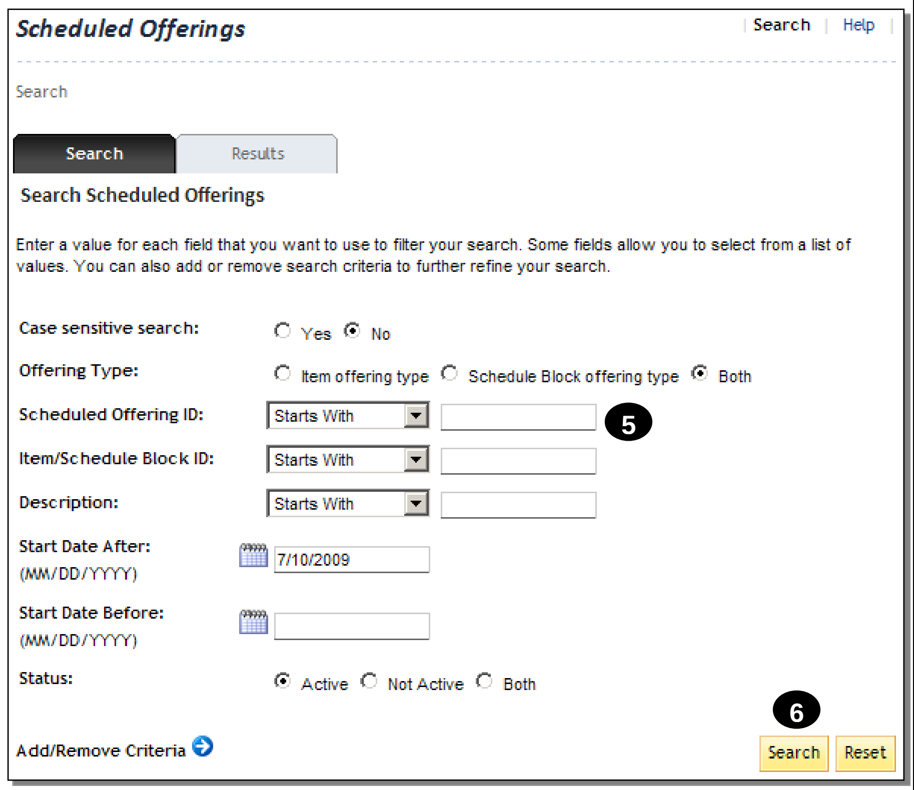
Select the criteria type on which the user population is based.

For this example, let's search for all users within a specific scheduled offering.

Click Next.</td><td>


</td></tr>
</table>

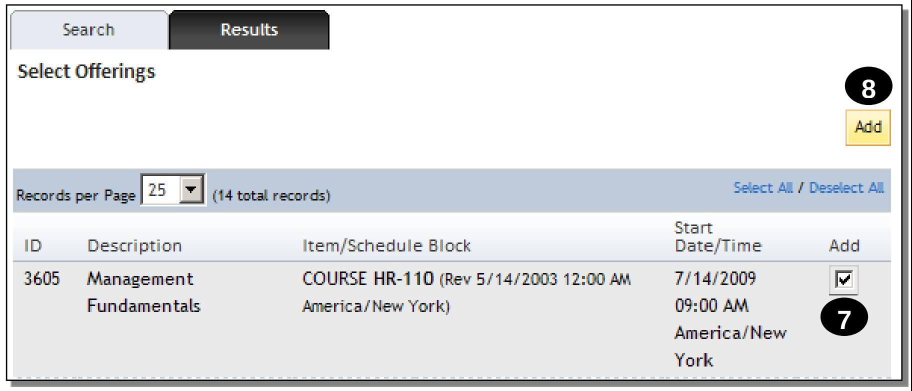
Create and Send Notifications Using Send Notifications Tool, Continued

	Step 2: Select Scheduled Offering of the Send Notifications wizard displays.	
4	Add a scheduled offering to the criteria by clicking the **add one or more from list** link to search for the offering.	
5	Search for a scheduled offering by entering criteria.	
6	Click **Search**.	

Create and Send Notifications Using Send Notifications Tool, Continued

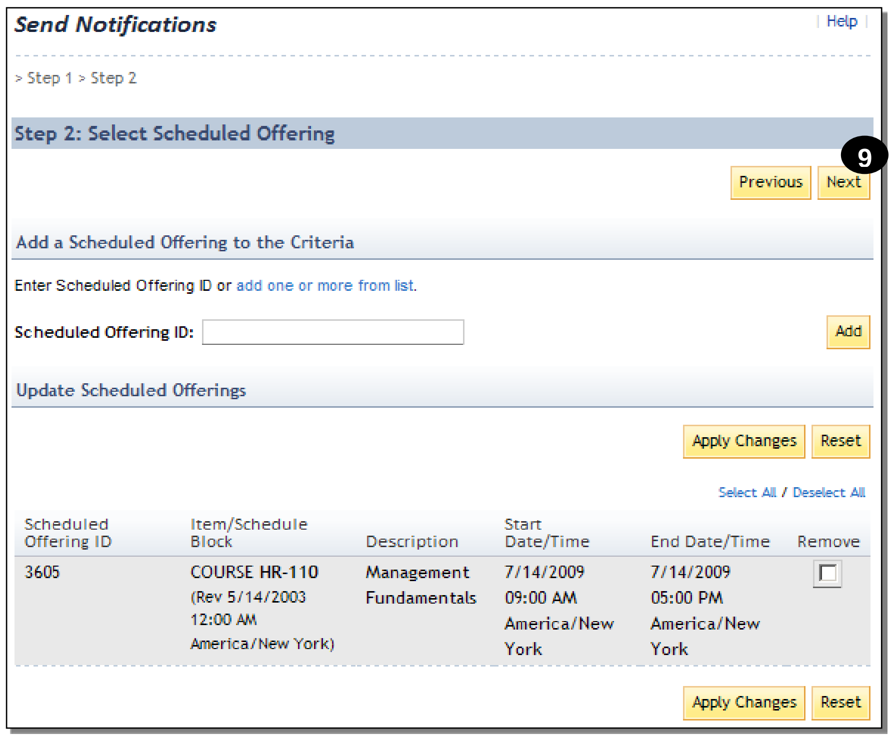
7 Select the scheduled offering by clicking the **Add** checkbox.

8 Click **Add** to continue.



This returns you to Step 2 of the Send Notifications wizard.

9 Click **Next**.



Step 3: Refine Population of the Send Notifications wizard displays.

10 Select a registration status for the scheduled offering. In this example, let's select all users currently enrolled.

11 Click **Next**.

Create and Send Notifications Using Send Notifications Tool, Continued

Step 4: Add/Remove Users of the Send Notifications wizard displays.

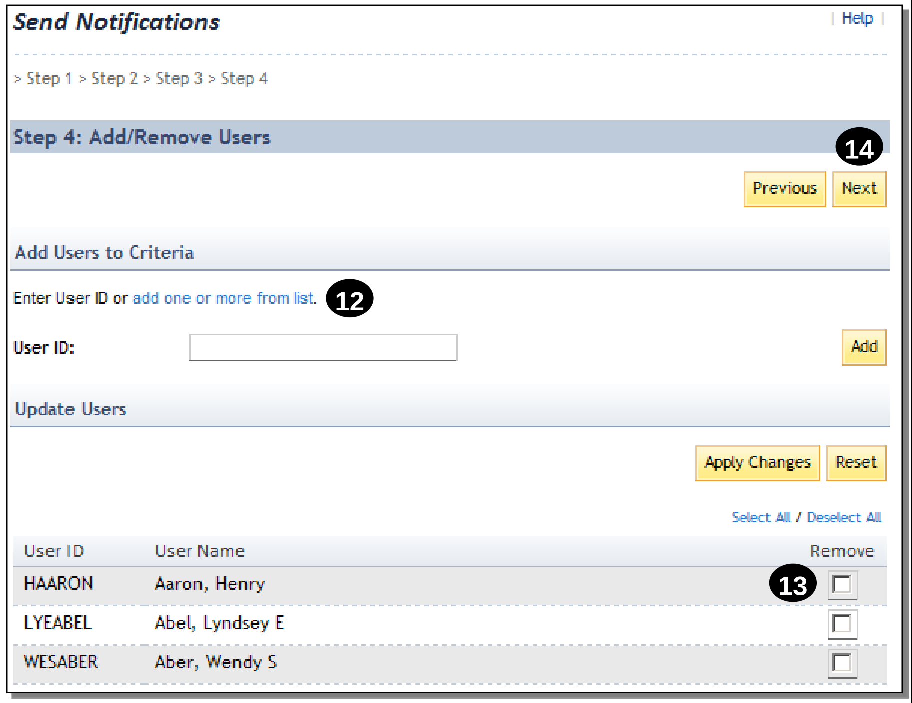
Review the list of enrolled users.

12 Click the **add one or more from list** link to add more users.

and/or

13 Click the **Remove** checkbox for users you wish to remove from the list., and click **Apply Changes**.

14 Click **Next**.



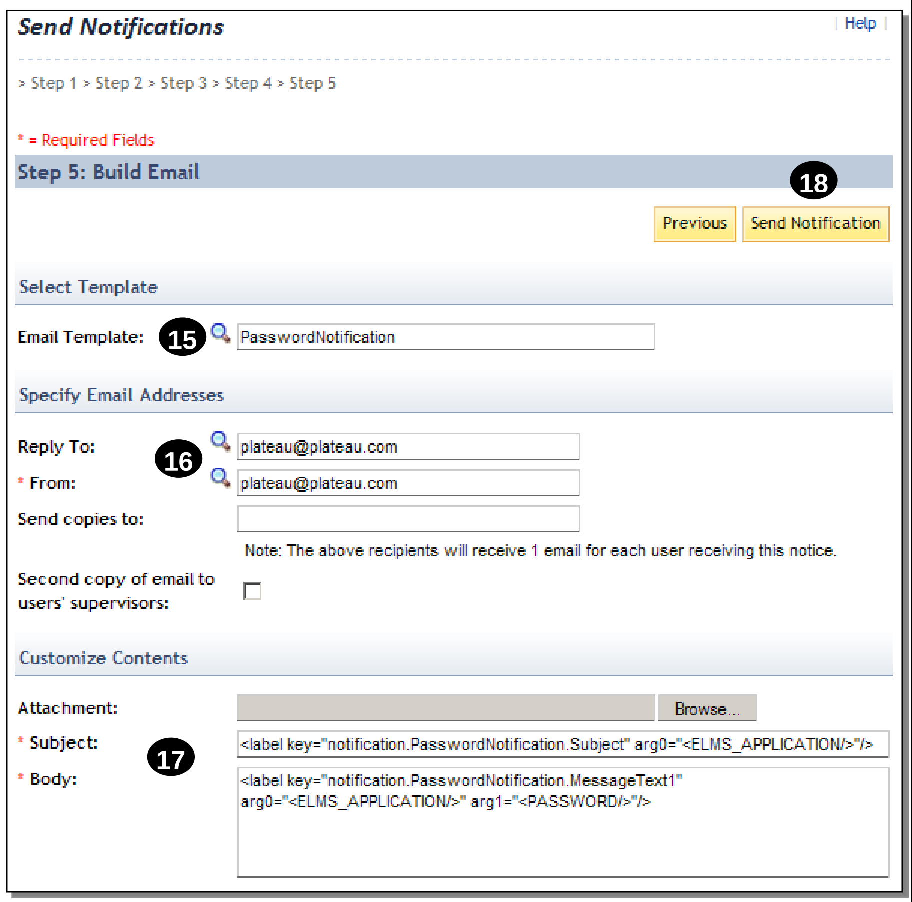
Step 5: Build Email of the Send Notifications wizard displays.

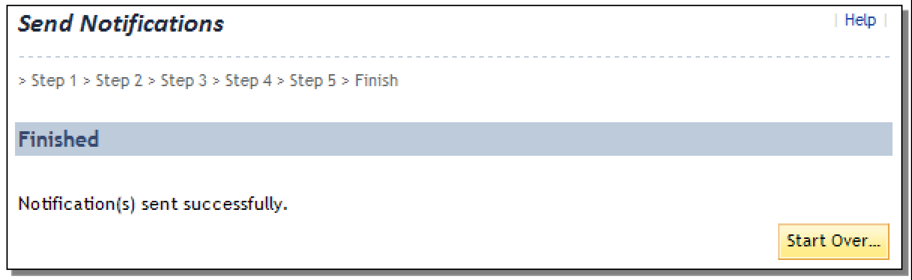
15 Click the **select icon** select an email template.

16 Select a Reply To and From email address.

17 Contents of the message can be customized by making any necessary edits to the subject and body of the message as well as adding an attachment.

18 Click **Send Notification**.



Create and Send Notifications Using Send Notifications Tool, Continued		
	You have successfully sent a notification to all selected users. Click the **Start Over…** button to send additional notifications to a user population based on scheduled offering, item, curriculum, or class.	

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Use the Required Dates Editor Tool

Description

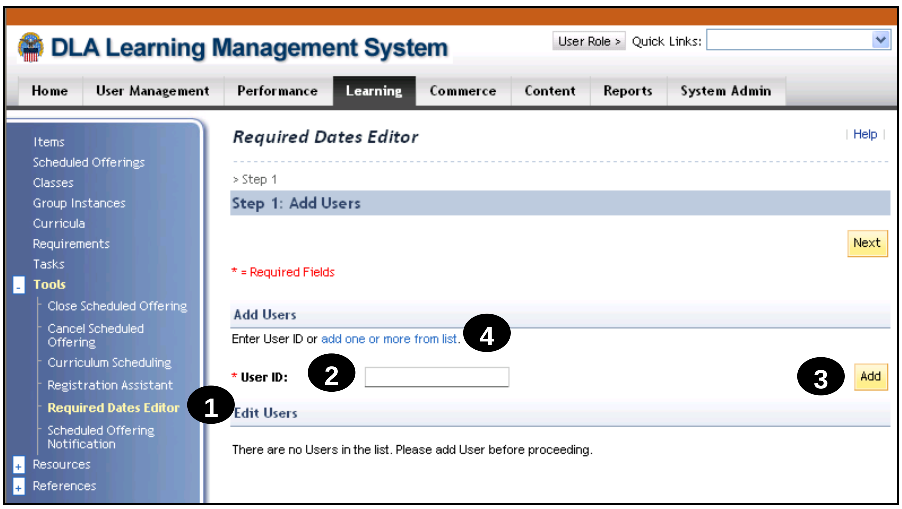
The purpose of this job aid is to guide administrators through the step-by-step process of using the Required Dates Editor tool.

Tasks

- Use the Required Dates Editor Tool to Adjust Due Dates

Use the Required Dates Editor Tool to Adjust Due Dates

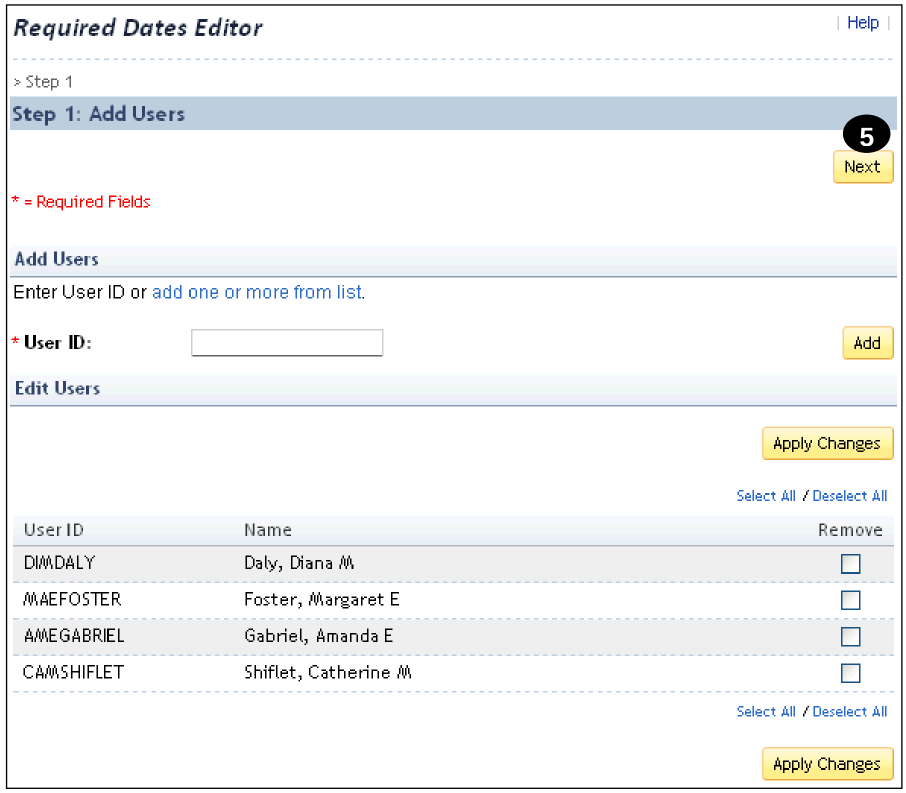
1	Navigate to **Learning > Tools > Required Dates Editor**. *Step 1: Add Users* of the Required Dates Editor wizard displays.
2	To add a user, enter the exact user ID in the User ID textbox.
3	Click **Add**.
	or
4	Click the **add one or more from list** link to search for and select users.



Use the Required Dates Editor Tool to Adjust Due Dates, Continued

For this example, we searched and selected all users who report to the same supervisor.
Now that we have a list of users, we can continue with the tool.

5 Click **Next**.



Step 2: Add Curricula of the Required Dates Editor wizard displays.

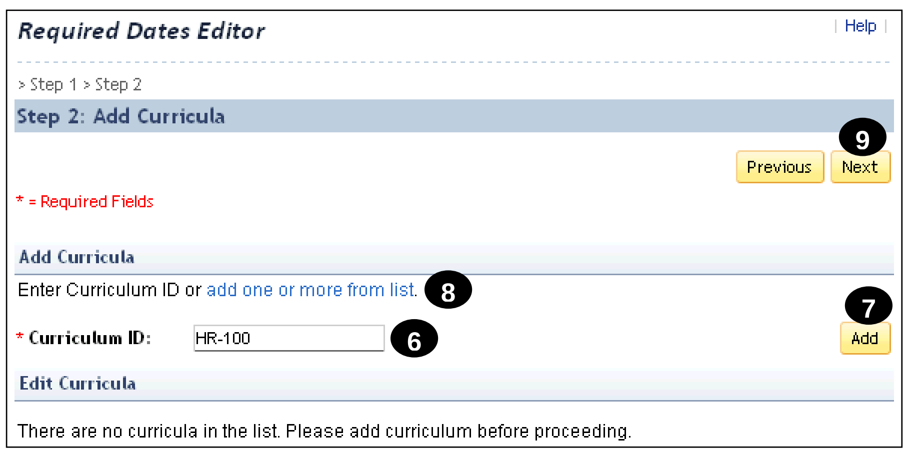
6 To add a curriculum, enter the exact curriculum ID in the Curriculum ID textbox.

7 Click **Add**.

or

8 Click the **add one or more from list** link to search for and select one or more curricula.

9 Click **Next** to continue.



Note: At least one item should be selected. An item could be selected either by choosing a curriculum or free-floating items. Step 2 of the Required Dates Editor adds curricula; Step 3 adds free-floating items.
If you want to add free-floating items only, skip to Step 9.

Use the Required Dates Editor Tool to Adjust Due Dates, Continued

Step 3: Add Free-floating Items of the Required Dates Editor wizard displays.

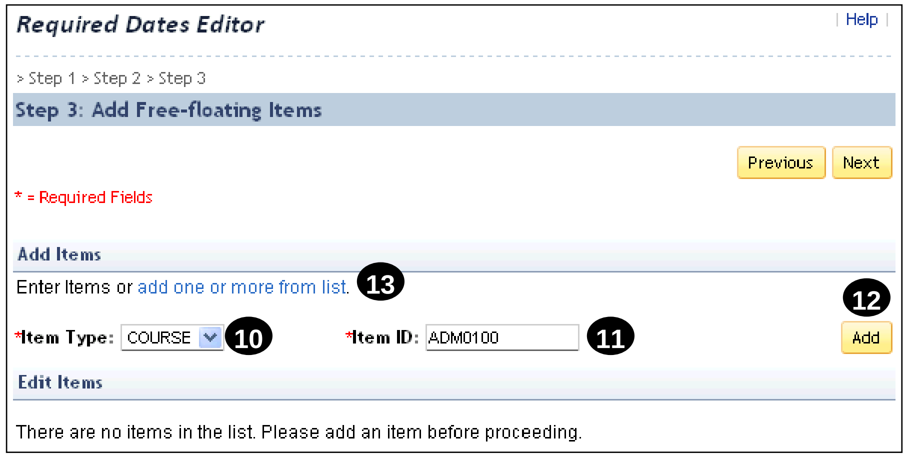
10 To add items, select the item type from the drop-down menu.

11 Enter the exact item ID.

12 Click **Add**.

or

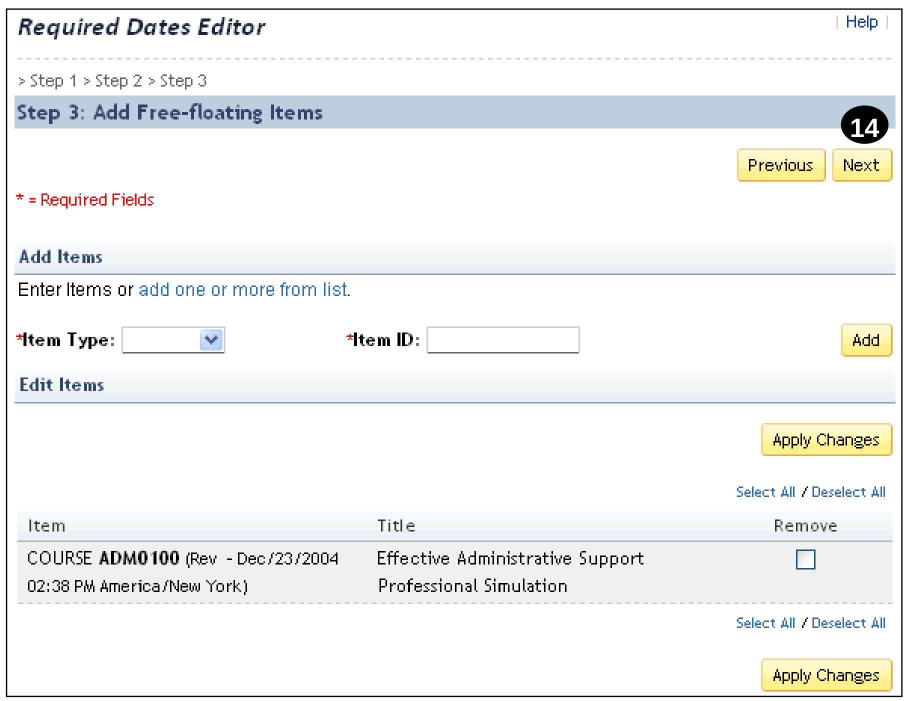
13 Click the **add one or more from list** link to search and select one or more items.



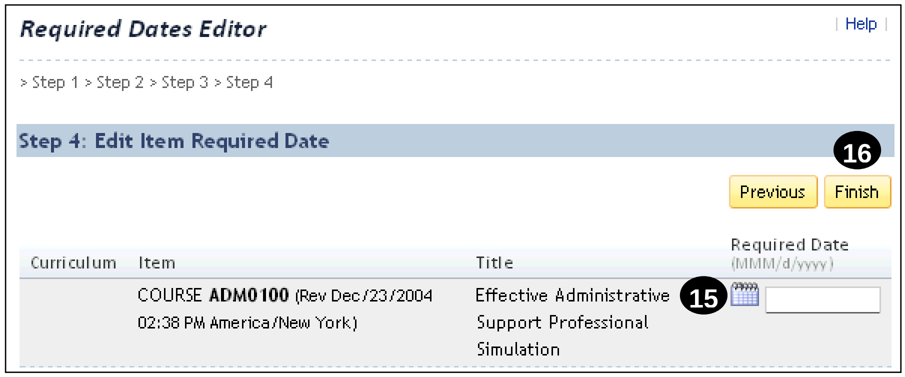
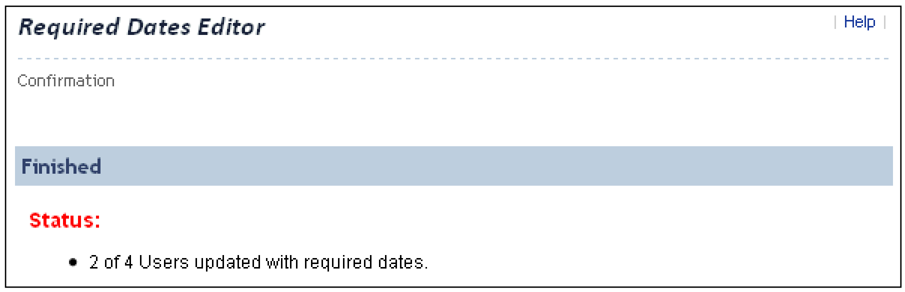
For this example, we added the course *Accident Review Panels*. One or more items can be added.

Now that we have an item, we can continue with the tool.

14 Click **Next**.



Use the Required Dates Editor Tool to Adjust Due Dates, Continued

	Step 4: Edit Item Required Date of the Required Dates Editor wizard displays.	
15	Click the **calendar icon** to select a required date for the item listed.	
16	Click **Finish**.	
	The users' learning plans were successfully updated.	

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