

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.

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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



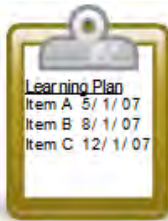
User: Any person for whom a record has been created in the users section of the user management area for whom you wish to keep learning records and to register for courses. A user is anyone, with administrative access to the application, whose information has been recorded in the system. The system uses 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.



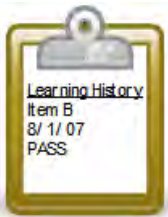
Curriculum: A grouping of items and/or sub-curricula that allows you to more easily assign a given set of learning items to a user, and to track the completion and maintenance of required learning.



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).



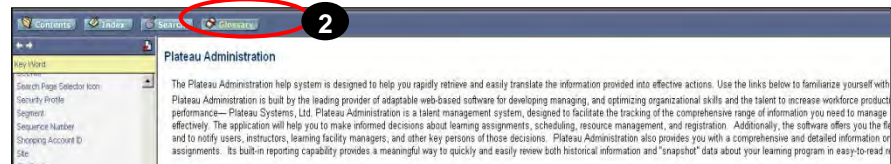
Learning History: A detailed list of all of the recorded Learning Events for a user.

Identify and Use Glossary

1 The Glossary can be accessed by clicking the **Help** link on the top of the menu bar.



2 Once in the help files, click **Glossary**. A list of terms displays.



3 Click a term.

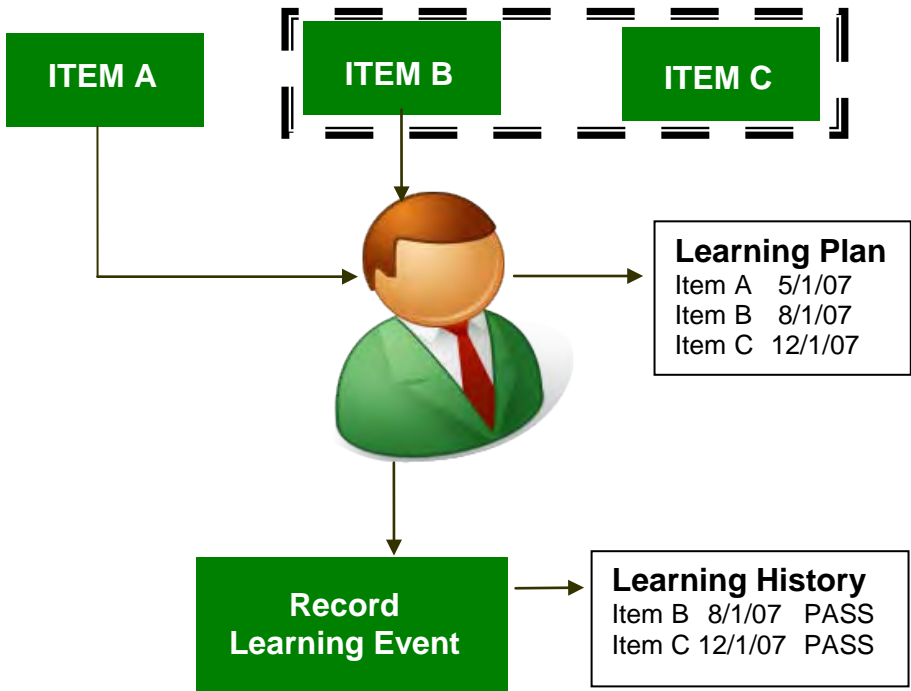
4 The term definition displays.



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Overview of the DLA LMS Learning Model

The Learning Needs Management Model is the foundation of the DLA LMS.



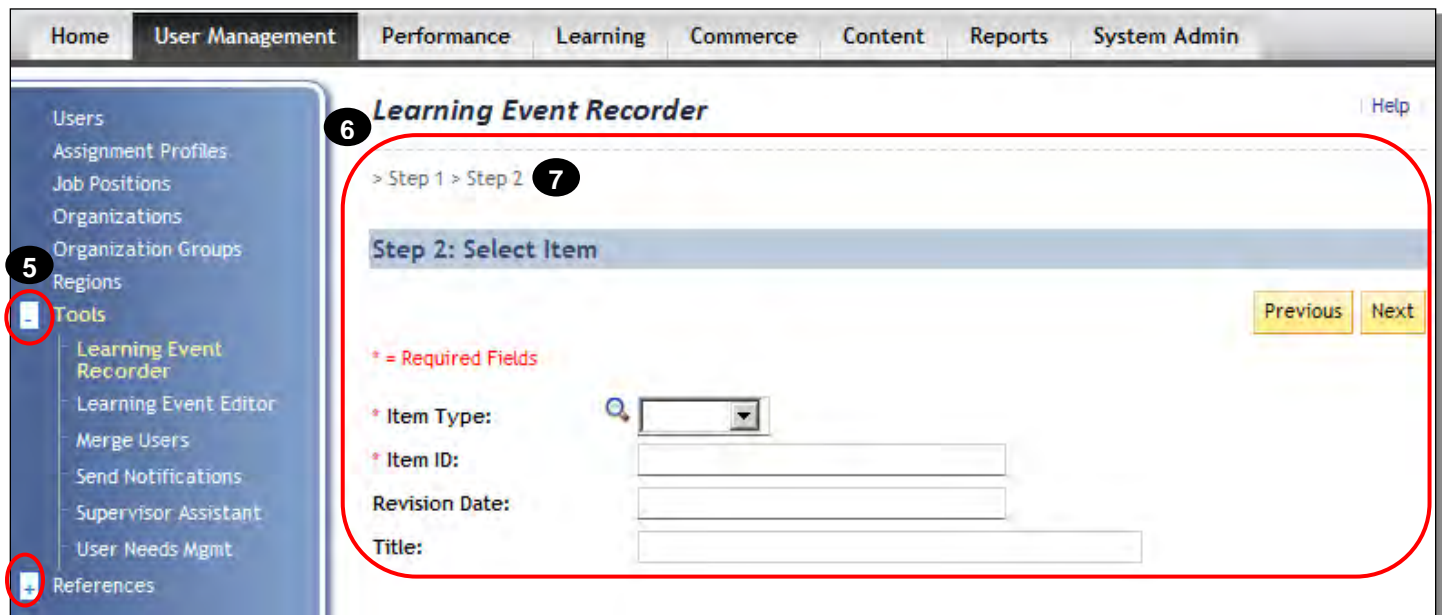
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Identify Areas of the DLA LMS Interface

The screenshot shows the DLA Learning Management System interface. At the top, there is a navigation bar with a logo and the title "DLA Learning Management System". To the right of the logo is a search box labeled "Quick Links:" and a "Help" link. Further right are links for "Preferences", "Check System", and "Sign Out". Below the navigation bar is a main menu with tabs: "Home", "User Management", "Performance", "Learning", "Commerce", "Content", "Reports", and "System Admin". The main content area is titled "Welcome Your Name" and includes a "Quick Links" section with three items: "Record Learning", "Add New Scheduled Offering", and "Manage User Needs". To the right of the Quick Links is a "Welcome to DLA LMS Administration" section with a list of bullet points. Below that is a "DLA LMS Help System" section with a paragraph of text. A "Help" link is located in the top right corner of the main content area.


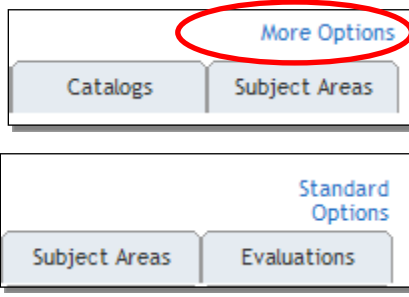
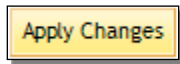





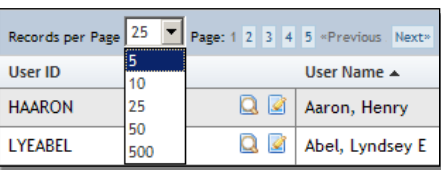
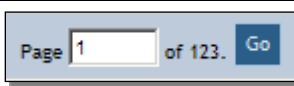




- 1 The top menu frame (main menu) contains links to the main functional areas in the administrator interface. When a top menu option is clicked, a left menu displays.
- 2 Quick Links provides quick access to commonly used functions in the DLA LMS. These same functions can be found on the first page 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
	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.
	Tabs are used to access the labeled information. The More Options link displays all available tabs. Once clicked, the link changes to Standard Options .
	Click Apply Changes to save new or edited information in an existing database record.
	Click Add to save a new record into the database once an admin has completed all necessary fields.
	Once an admin has accessed a record in edit mode, click Copy to copy the existing record to a new unique ID.
	Once an admin has accessed a record in edit mode, click Delete to delete the record from the DLA LMS.
	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.
	The Search link opens a search page (more on how to use the search pages below).
	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.
	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.
	On a search results page, an admin can use the Select All / Deselect All links to select all, or deselect all, results.
	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

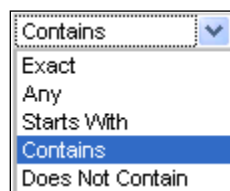
The purpose of this job aid is to guide you, the administrators, through the step-by-step process of performing simple and advanced searches for multiple record types within the DLA LMS.

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.
	<p>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.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> Job Positions: <input type="text" value="Is Empty"/> ▼ <input type="text" value=""/>  </div>
<p>You can also choose whether or not you want your search to be case sensitive by using the <i>Case Sensitive Search</i> 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.</p>	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No </div>


Commonly Used Search Icons

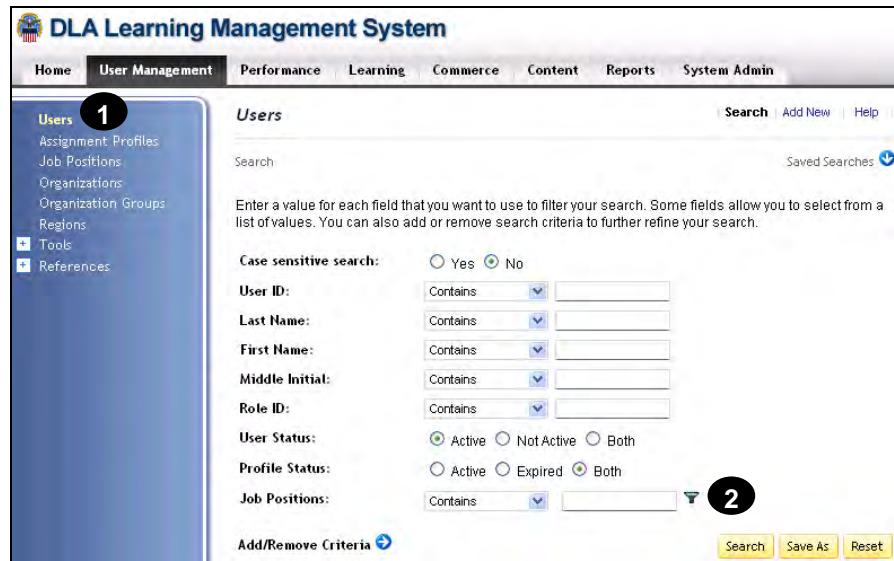
Icon	Description
	The Calendar picker is associated with the date field. Use it to select and populate the corresponding date field.
	Click the Create Filter button to find and select a corresponding entity to include in your search filter.
	Click the Clear Filter button to clear the content of your 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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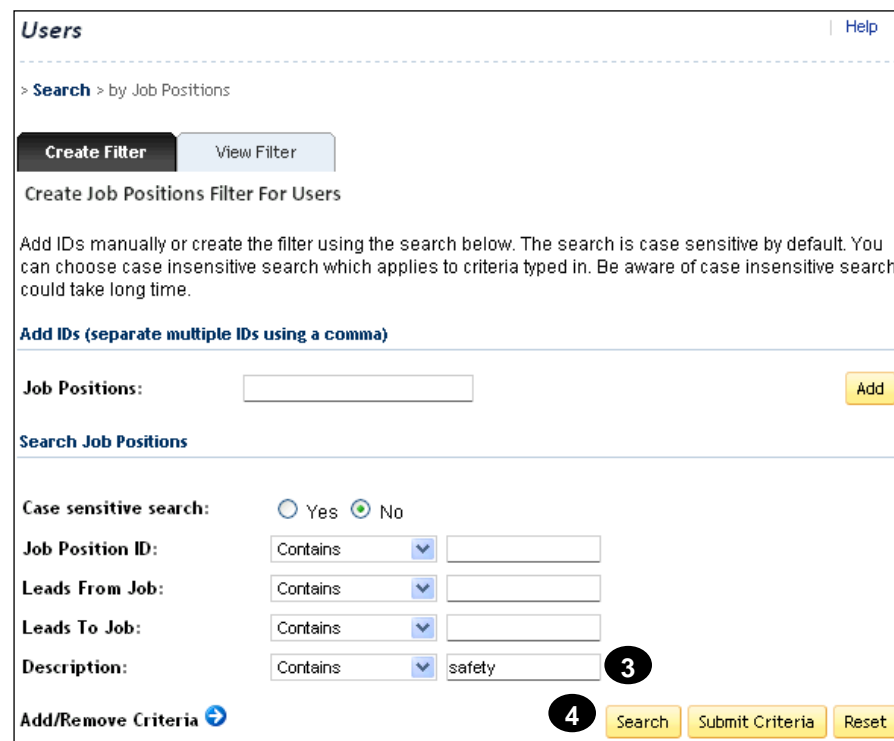
Create/Delete Search Filters

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.

Users | Help

> Search > by Job Positions

Create Filter View Filter

Select Job Positions from list

<< Search Again

Submit Selection Reset

Job Position ID	Description	Select
CSO	Consumer Safety Officer	<input type="checkbox"/>
EHS-HS-MGR	HEALTH AND SAFETY MANAGER	<input type="checkbox"/>
EHS-SAFETY-I	SAFETY OFFICER LEVEL I	<input checked="" type="checkbox"/>
EHS-SAFETY-II	SAFETY OFFICER LEVEL II	<input checked="" type="checkbox"/>

Submit Selection Reset

- You are returned to the filter screen to view the filter just created.
- Confirm your selection(s) are correct.
- 7 Click Submit Filter.

Users | Help

> Search > by Job Positions

Create Filter View Filter

View Job Positions Results

This screen allows you to view and edit the items you have selected. You can also Add additional IDs to your list. The "Submit Filter" button will submit your selected items to the previous search. The filter IDs are case sensitive.

Job Positions: Add

Submit Filter Remove Checked IDs Reset



Job Position ID	Description	Remove
EHS-SAFETY-I	SAFETY OFFICER LEVEL I	<input type="checkbox"/>
EHS-SAFETY-II	SAFETY OFFICER LEVEL II	<input type="checkbox"/>

Submit Filter Remove Checked IDs Reset

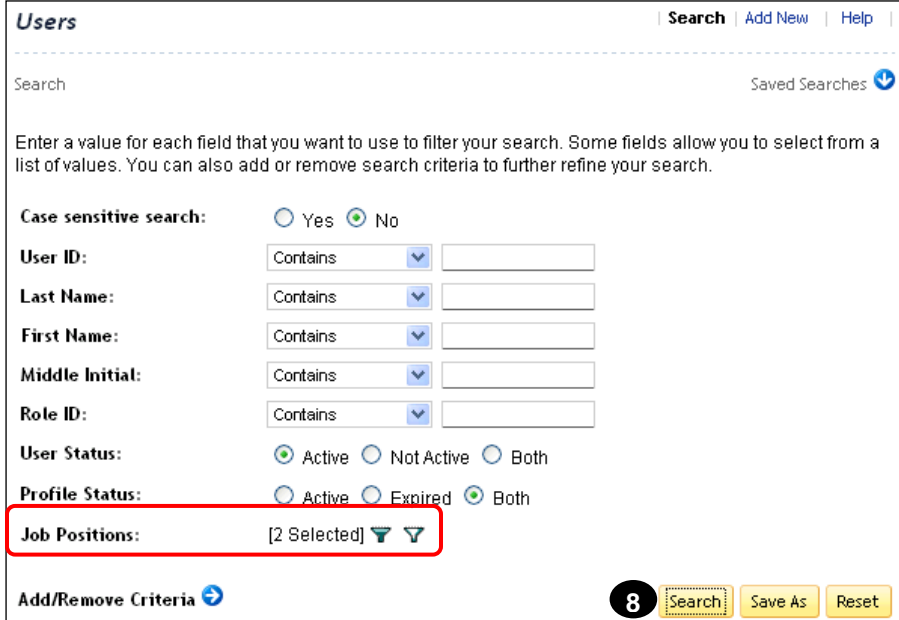
Create/Delete Search Filters, Continued

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.



Users | Search | Add New | Help

Search Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes No

User ID: Contains []

Last Name: Contains []


First Name: Contains []


Middle Initial: Contains []

Role ID: Contains []

User Status: Active Not Active Both

Profile Status: Active Expired Both

Job Positions: [2 Selected] 

Add/Remove Criteria 

8 Search Save As Reset


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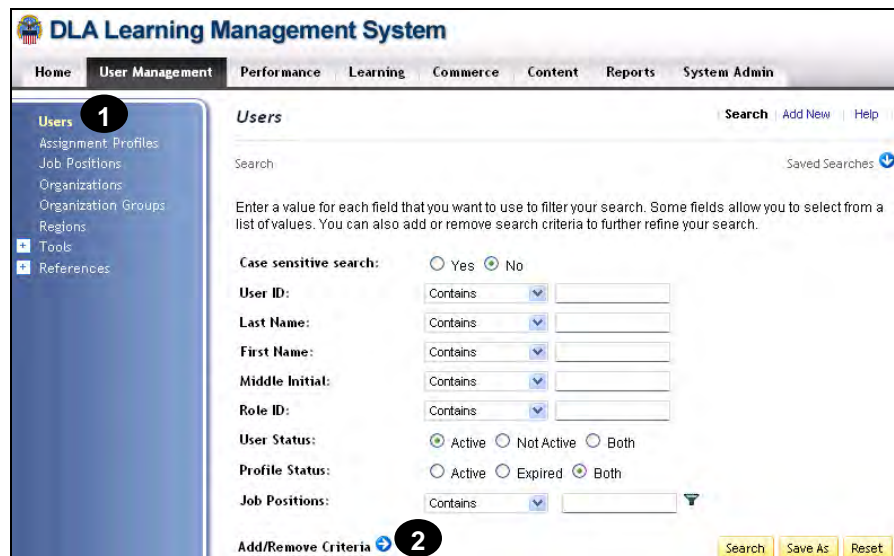
Add/Remove Criterion from Search Filter

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 .



DLA Learning Management System

Home User Management Performance Learning Commerce Content Reports System Admin

Users | Search | Add New | Help

Search Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes No

User ID: Contains []

Last Name: Contains []


First Name: Contains []


Middle Initial: Contains []

Role ID: Contains []

User Status: Active Not Active Both

Profile Status: Active Expired Both

Job Positions: Contains [] 

Add/Remove Criteria 

Search Save As Reset

Add/Remove Criterion from Search Filter, Continued

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

4 Click **Submit Query**.

Search Criteria

<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> State	<input checked="" type="checkbox"/> Job Positions
<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Country	<input type="checkbox"/> Alternate Job Positions
<input checked="" type="checkbox"/> Middle Initial	<input checked="" type="checkbox"/> Organizations	<input type="checkbox"/> Assignment Profiles
<input checked="" type="checkbox"/> Role ID	<input type="checkbox"/> Organization Group	<input type="checkbox"/> Competency Profiles
<input checked="" type="checkbox"/> User Status	<input type="checkbox"/> Competency	<input type="checkbox"/> Curricula
<input type="checkbox"/> Related Admin	<input type="checkbox"/> Items Completed	<input type="checkbox"/> Supervisors
<input checked="" type="checkbox"/> Profile Status	<input type="checkbox"/> Items Needs	<input type="checkbox"/> Originator
<input type="checkbox"/> Hire Date After	<input type="checkbox"/> Items Requests	<input type="checkbox"/> Line of Business

4 Submit Query

The new criteria appear on the search screen.

Users | Search | Add New | Help

Search Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes No

User ID: Contains [dropdown] [input]

Last Name: Contains [dropdown] [input]

First Name: Contains [dropdown] [input]

Middle Initial: Contains [dropdown] [input]

Role ID: Contains [dropdown] [input]

User Status: Active Not Active Both

Profile Status: Active Expired Both

Organizations: Contains [dropdown] [input] [filter icon]

Employee Statuses: Contains [dropdown] [input]

Add/Remove Criteria [arrow]

Search Save As Reset

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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.

Users | Search | Help |

Search Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes No

User ID:

Last Name:

First Name:

Middle Initial:

Role ID:

User Status: Active Not Active Both

Organizations: **1**

Employee Statuses: **2**

Add/Remove Criteria

- 3 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.

Users | Help |

> Search > by Employee Statuses

Select Employee Status from list

<< Search Again

4

Records per Page 25 (5 total records) Select All / Deselect All

Employee Status ID	Description	Select
ACT	Active	<input type="checkbox"/>
FT	Full Time	<input type="checkbox"/>
LEAVE	Temporary Leave	<input type="checkbox"/>
PT	Part Time	<input checked="" type="checkbox"/> 3
TEMP	Temporary	<input type="checkbox"/>


Records per Page 25 (5 total records) Select All / Deselect All

Select from a List, Continued

5

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

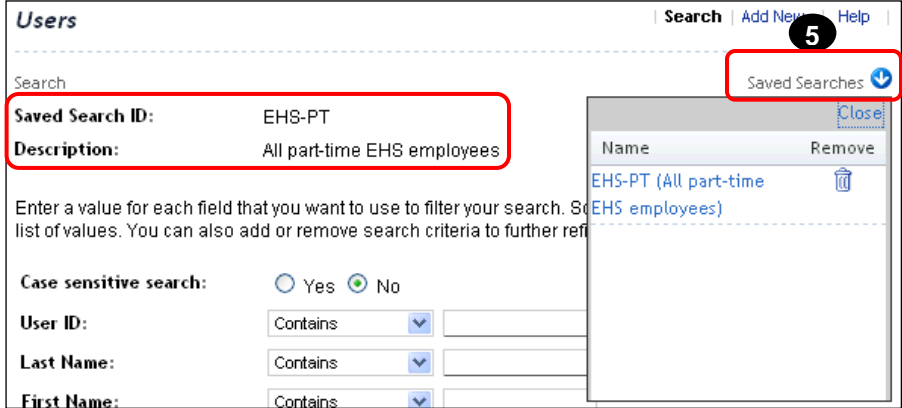
3 Enter an intuitive description in the Description textbox.

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.




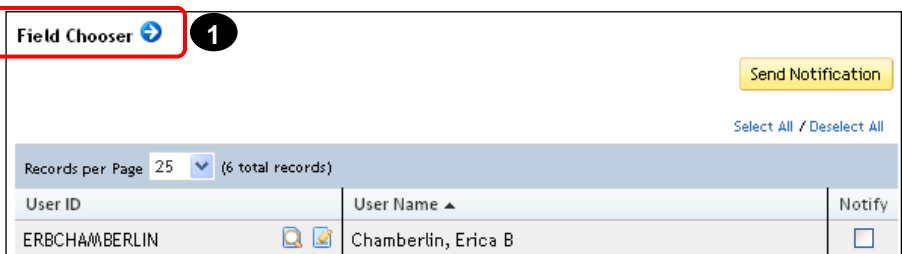
The screenshot shows the 'Users' search interface. At the top right, there are links for 'Search', 'Add New', and 'Help'. A 'Saved Searches' dropdown menu is open, showing a list with 'EHS-PT (All part-time EHS employees)'. Below this, the 'Saved Search ID' is 'EHS-PT' and the 'Description' is 'All part-time EHS employees'. There are also fields for 'Case sensitive search' (Yes/No), 'User ID', 'Last Name', and 'First Name', each with a 'Contains' dropdown and an input field.

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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.

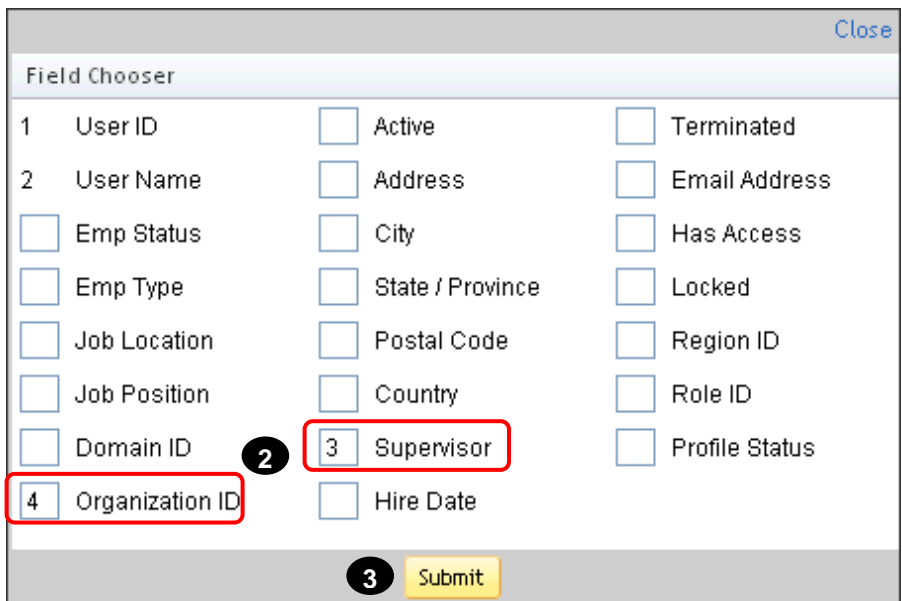


The screenshot shows the search results page. At the top left, the 'Field Chooser' icon is highlighted with a red box and a '1' in a circle. Below the icon is a 'Send Notification' button and a 'Select All / Deselect All' link. A table shows search results with columns for 'User ID', 'User Name', and 'Notify'. The first row contains 'ERBCHAMBERLIN', 'Chamberlin, Erica B', and a checkbox.

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).



The screenshot shows the 'Field Chooser' dialog box. It contains a list of attributes with checkboxes: 'User ID', 'User Name', 'Emp Status', 'Emp Type', 'Job Location', 'Job Position', 'Domain ID', 'Organization ID', 'Active', 'Address', 'City', 'State / Province', 'Postal Code', 'Country', 'Hire Date', 'Terminated', 'Email Address', 'Has Access', 'Locked', 'Region ID', 'Role ID', and 'Profile Status'. The 'Supervisor' checkbox is highlighted with a red box and a '3' in a circle. The 'Organization ID' checkbox is highlighted with a red box and a '4' in a circle. At the bottom, there is a 'Submit' button highlighted with a red box and a '3' in a circle.

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	<input type="checkbox"/>
LABHOLLMAN	Hollman, Laura B	IATSUMERS	EHS	<input type="checkbox"/>
CLBPITNER	Pitner, Claire B	KAEBROCKMAN	EHS	<input type="checkbox"/>
DABRILEY	Riley, David B	CHMBURKERT	EHS	<input type="checkbox"/>
KABVAN	Van, Katrina B	PADSHEPHERD	EHS	<input type="checkbox"/>
ANBWAMBERSIE	Wambersie, Ann B	LALTHOMPSON	EHS	<input type="checkbox"/>

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).

- 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	<input type="checkbox"/>
JADALBERTI	Alberti, Jamie D	KIASMART	EHS	<input type="checkbox"/>
ERWAMRHEIN	Amrhein, Eric W	CHMBURKERT	EHS	<input type="checkbox"/>
MELANDERSON	Anderson, Megan L	DAPWEINBAUM	EHS	<input type="checkbox"/>
SAMARCE	Arce, Sandy M	RYCDAVIS	EHS	<input type="checkbox"/>
JEABACO	Baco, Jesse A	PARBUSCH	EHS	<input type="checkbox"/>
KALBAIRD	Baird, Katherine L	ERJSLAFF	EHS	<input type="checkbox"/>
SCABAKER	Baker, Scott A	LABHOLLMAN	EHS	<input type="checkbox"/>
JELBEAVERS	Beavers, Jessica L	MELANDERSON	EHS	<input type="checkbox"/>
TOLBENNETT	Bennett, Todd L	PADSHEPHERD	EHS	<input type="checkbox"/>

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

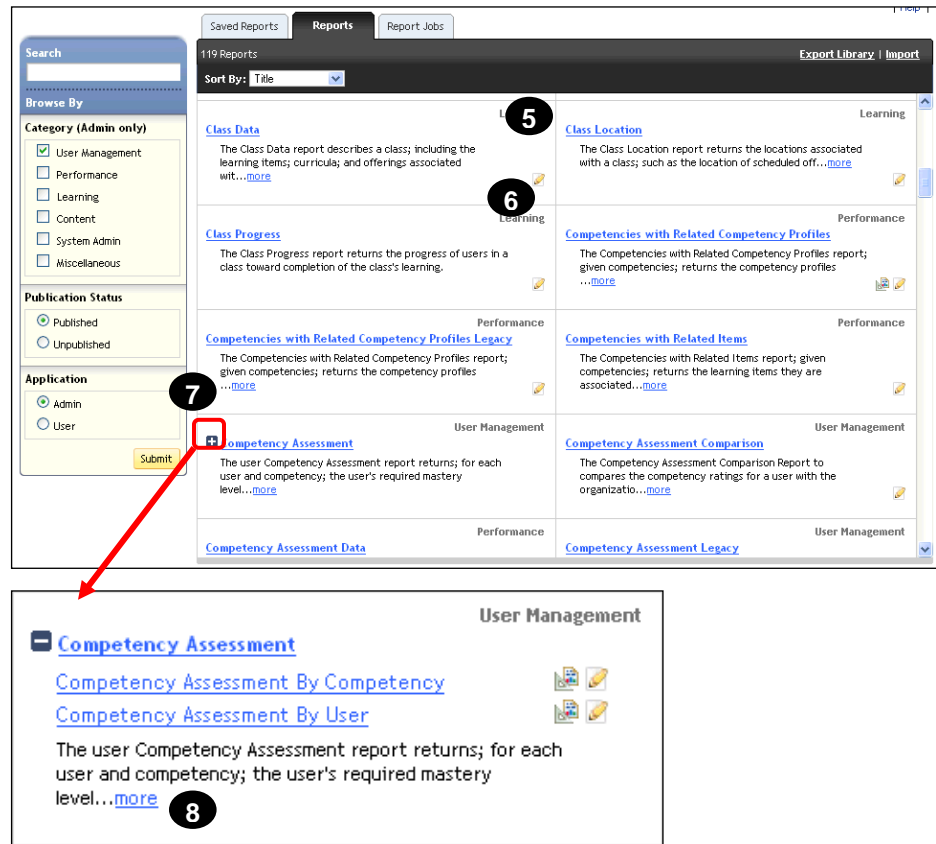
Access and Search for Reports

- 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.

The screenshot shows the DLA Learning Management System interface. The top navigation bar includes 'Home', 'User Management', 'Performance', 'Learning', 'Commerce', 'Content', 'Reports', and 'System Admin'. The 'Reports' tab is selected. On the left, there is a search and filter section with a search box (callout 2), a 'Browse By' section with checkboxes for 'Category (Admin only)' (User Management, Performance, Learning, Content, System Admin, Miscellaneous) and 'Publication Status' (Published, Unpublished), and an 'Application' section with radio buttons for 'Admin' and 'User'. A 'Submit' button is at the bottom of this section (callout 3). The main content area shows a list of reports with a 'Sort By' dropdown menu set to 'Title' (callout 4). The reports listed include 'Account Data', 'Approval Process Data', 'Approval Role Data', 'Assessment Process Results', 'Admin Access', 'Approval Role Coverage', 'Approvals Status', and 'Assessment Process Results Legacy'. Each report has a brief description and a 'more' link.

Access and Search for Reports, Continued

- 5 Click:
 - : 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.



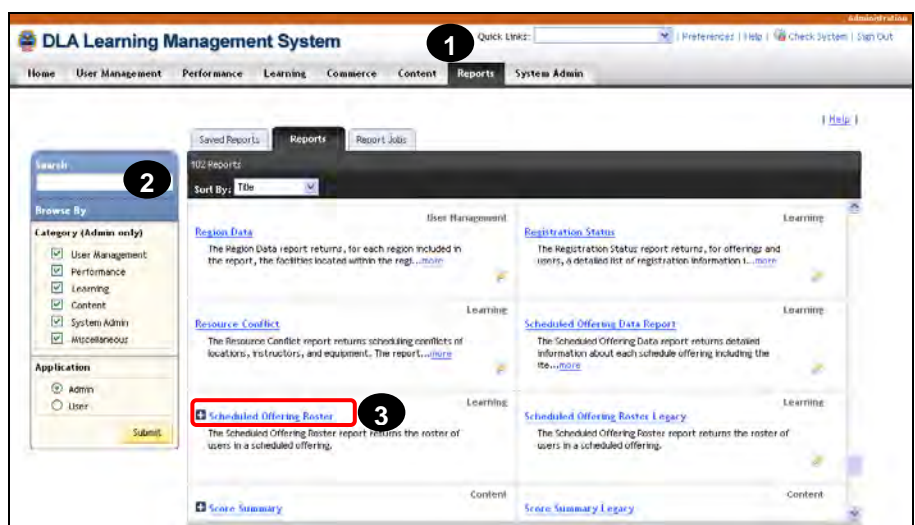
The screenshot shows the 'Reports' section of the LMS. On the left, there are filters for 'Browse By' (Category, Publication Status, Application) and a 'Submit' button. The main area displays a grid of report cards. The 'Competency Assessment' report is highlighted with a red box and a red arrow pointing to its expanded view below. The expanded view shows the report title 'Competency Assessment' under the 'User Management' category, followed by two sub-reports: 'Competency Assessment By Competency' and 'Competency Assessment By User'. A red circle with the number 8 is placed over the 'more' link in the expanded view.

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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.



The screenshot shows the 'Reports' page in the DLA Learning Management System. The 'Scheduled Offering Roster' report is highlighted with a red box and a red circle with the number 3. The page includes a search bar, filters for 'Browse By' (Category, Application), and a list of reports. The 'Scheduled Offering Roster' report is located in the 'Learning' category. The report title 'Scheduled Offering Roster' is highlighted with a red box and a red circle with the number 3.

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.

[Return to Table of Contents](#)

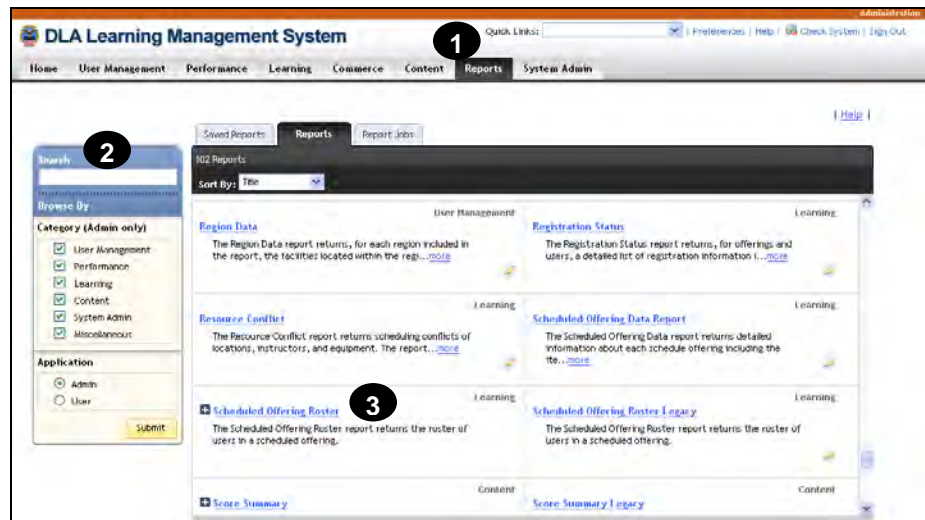
Schedule a Report

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.

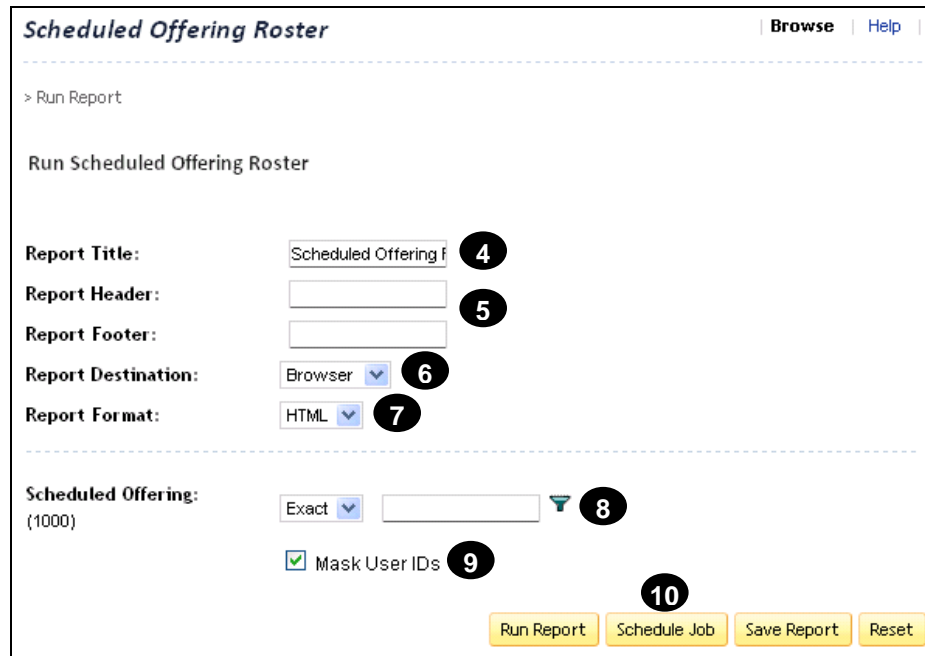
6 Select a report destination from the drop-down menu.

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**.

Scheduled Offering Roster | [Browse](#) | [Help](#) |

[> Run Report](#)

Schedule Background Job

You have opted to schedule this report to run in the background. Please complete the following information if you want this action to run at a specific date and time. If you choose to be notified by email upon completion, please select "Notify via email upon completion" checkbox and specify an email address. If you wish, the report file can be emailed to you when it has been generated, or you can download the report file once the report is complete from the Background Report Jobs module or, if the report has been scheduled as a recurring job, you can download the report from the Recurring Report Jobs module.

Run this job immediately, if allowable.
 Schedule this job to be executed on: [View Available Time Slots](#) **11**

Date: (MMM/d/yyyy)

Time: (hh:mm AM/PM)

Time Zone:

Schedule this job to recur as follows: **12**

Daily
 Weekly
 Monthly

Day:

Date:

Time of Day: (hh:mm AM/PM)

Time Zone:

Job Description:

Notify via email upon completion

Email:

Email the Report

13

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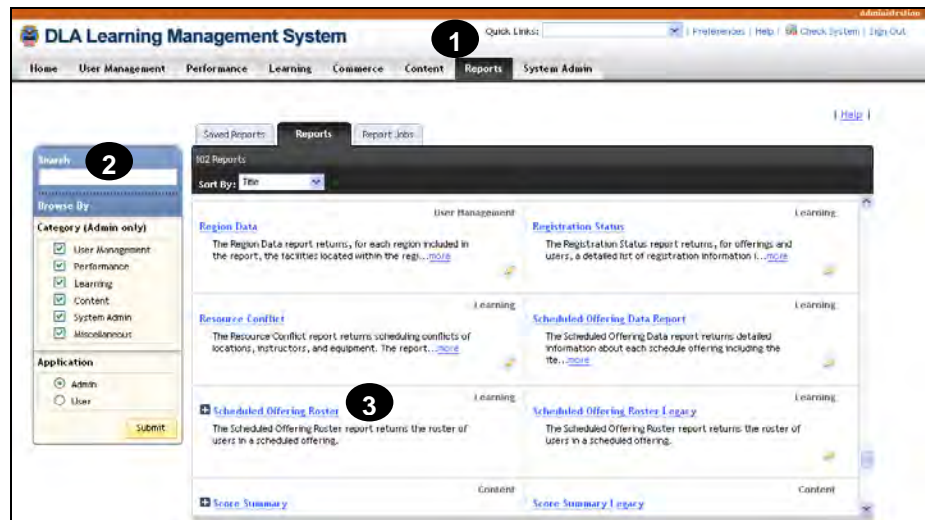
Save a Report

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.

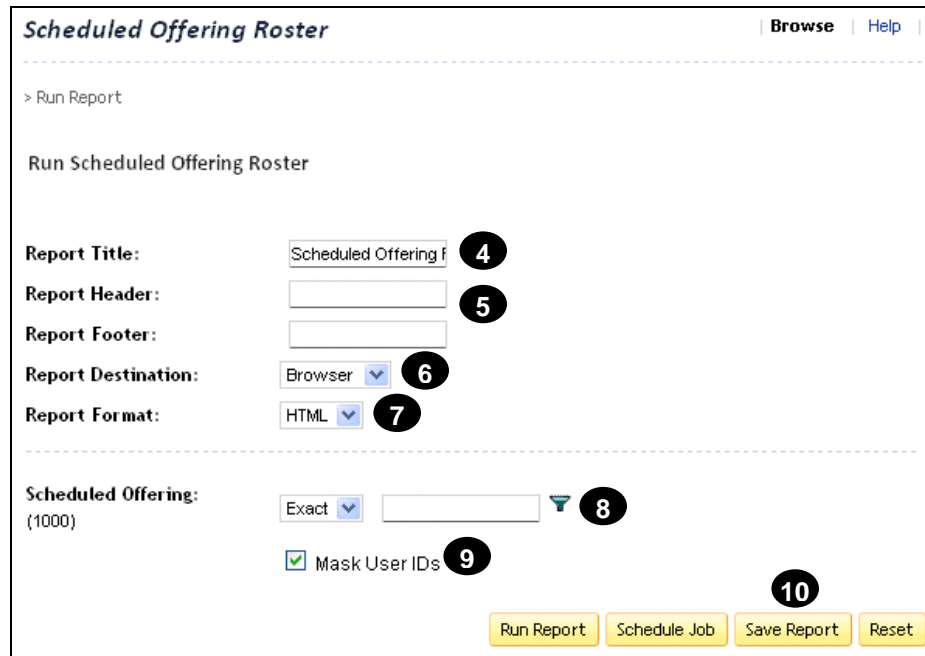
6 Select a report destination from the drop-down menu.


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.



Save a Report, Continued	
<p>11 Enter an ID for the saved report.</p> <p>12 Enter a description of the saved report.</p> <p>13 Click Submit.</p>	
<p>14 To run a saved report, click the Run icon  in the Actions column.</p>	

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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.

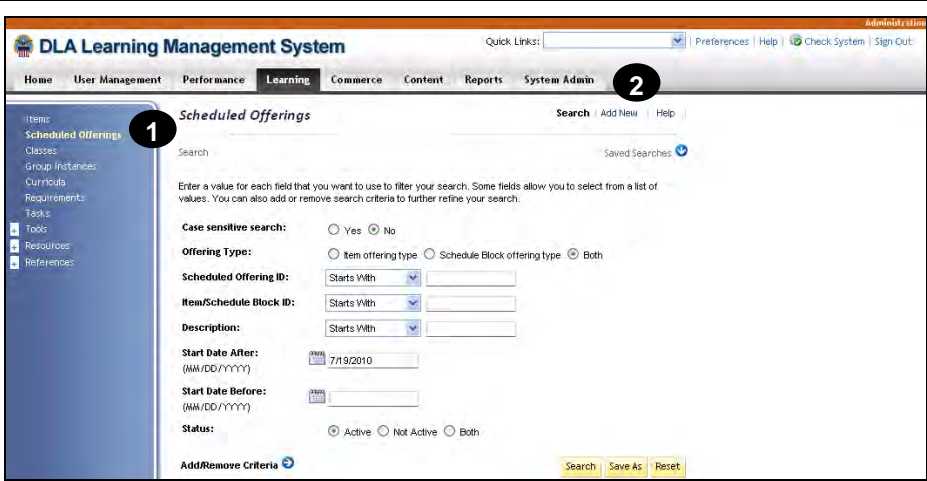

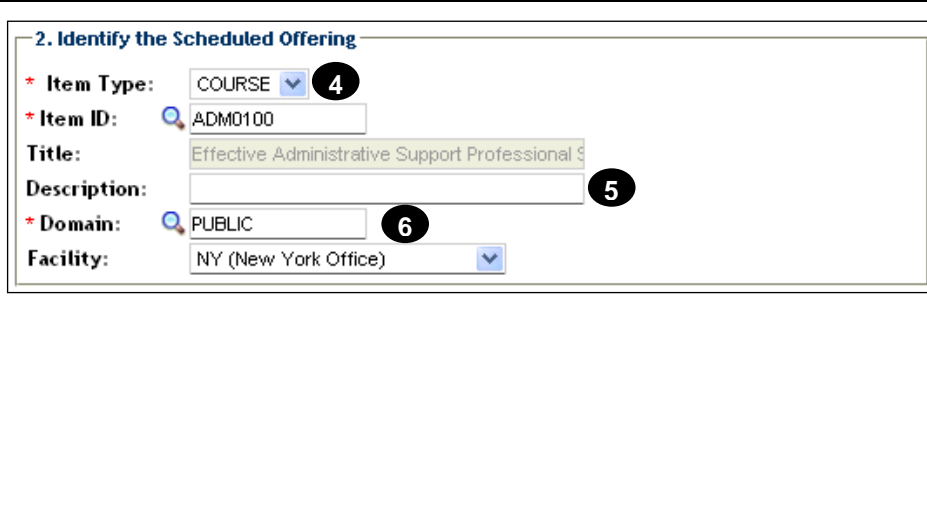
Tasks

- 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	
<p>1 Navigate to Learning > Scheduled Offerings.</p> <p>2 Click the Add New link. The Scheduled Offering wizard displays.</p>	
<p>3 Select the Item type option.</p>	
<p>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).</p> <p>5 Enter a description of the scheduled offering.</p> <p>6 Specify the appropriate Domain and Facility.</p>	

Create Scheduled Offering, Continued


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

Calendar Preview


<< ≤ **September 2009** ≥ >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3


Legend : - Schedule Dates ✘ - Conflict

- 7** Click the calendar icon  to select a start date.
- 8** Enter a start time.
- 9** Change the time zone of delivery, if necessary.

3. Set Up the Segment

* **Start Date:** (MMM/d/yyyy)  SEP/14/2009 **7**

* **Start Time:** (hh:mm AM/PM) 08:30 am **8**



* **Time Zone:** America/New York (Eastern Standard Time) **9** 



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.

4. Select Resources

Primary Instructor:   not-authorized



Primary Location:  

Equipment:  

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.

Calendar Preview

<< ≤ **September 2009** ≥ >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14  	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Legend : - Schedule Dates X - Conflict

Schedule Date/Time

Start Time	End Time
Sep/14/2009 08:30 AM	Sep/14/2009 04:30 PM X

Resource Usage View: Equipment v

10 Next

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

Warning


Warning Details:

- A conflict was detected for this scheduled offering.
- The instructor(s) are not authorized to teach this item.

Do you wish to proceed?

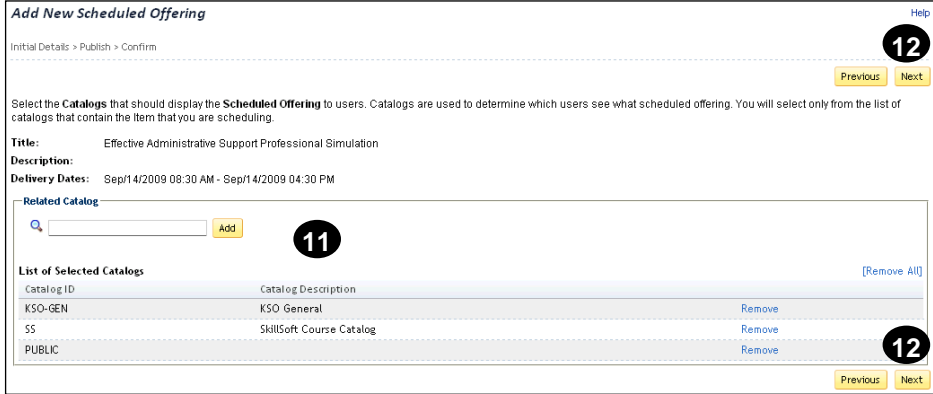
No Yes

Create Scheduled Offering, Continued

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

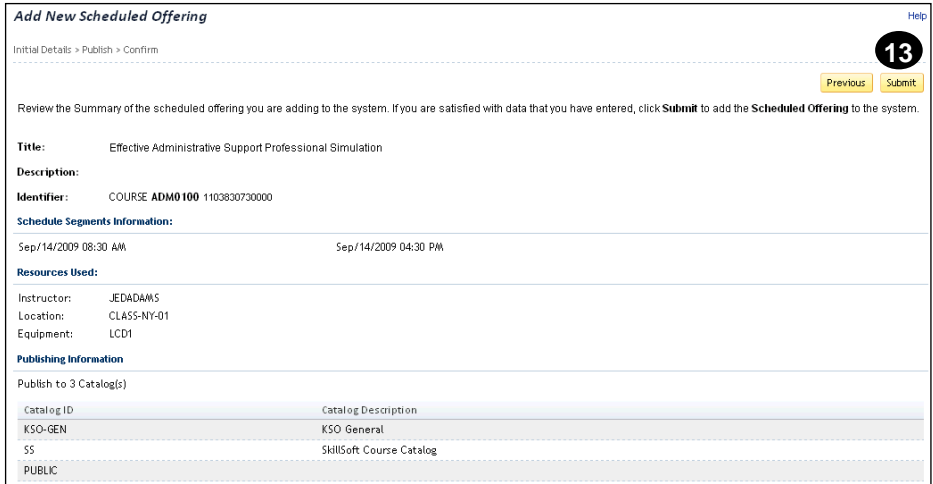
If the item resides in a catalog, it will already be listed.

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.

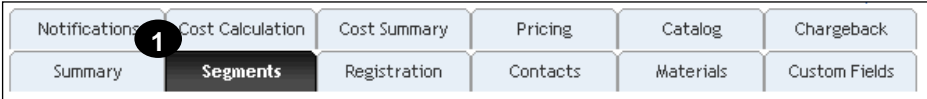
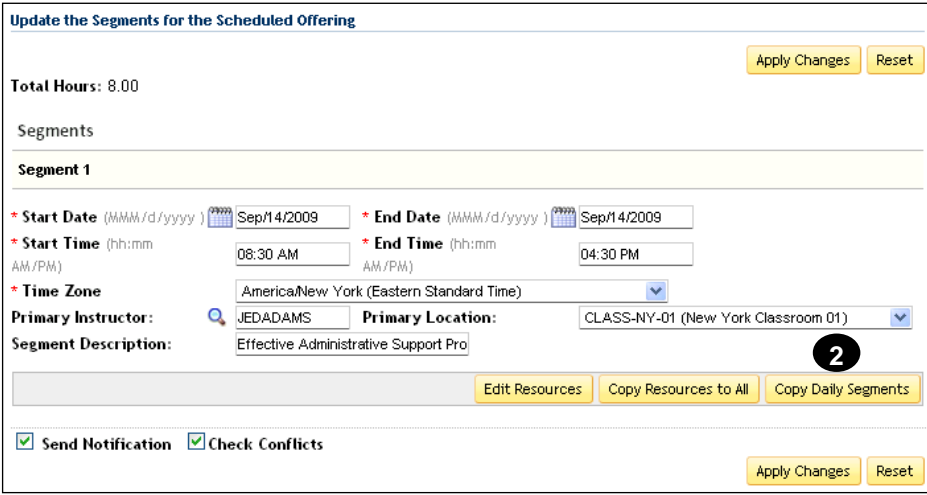
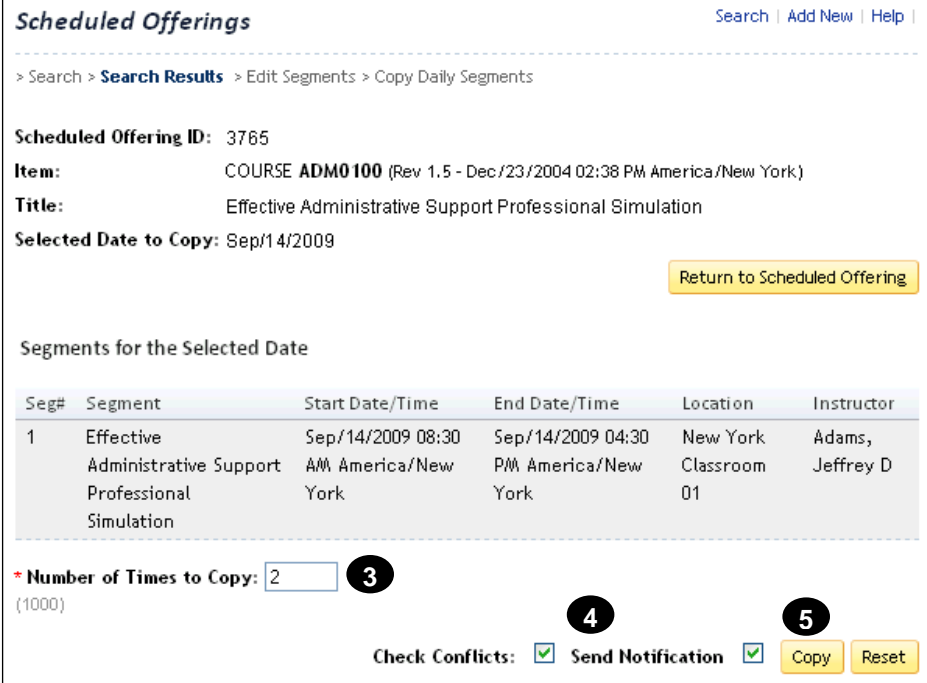


14 View the scheduled offering record.

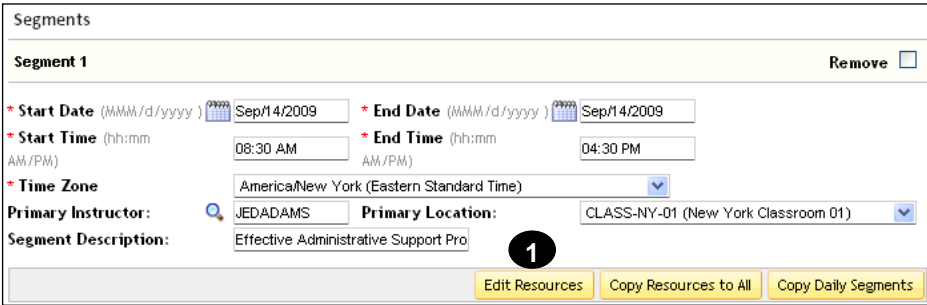
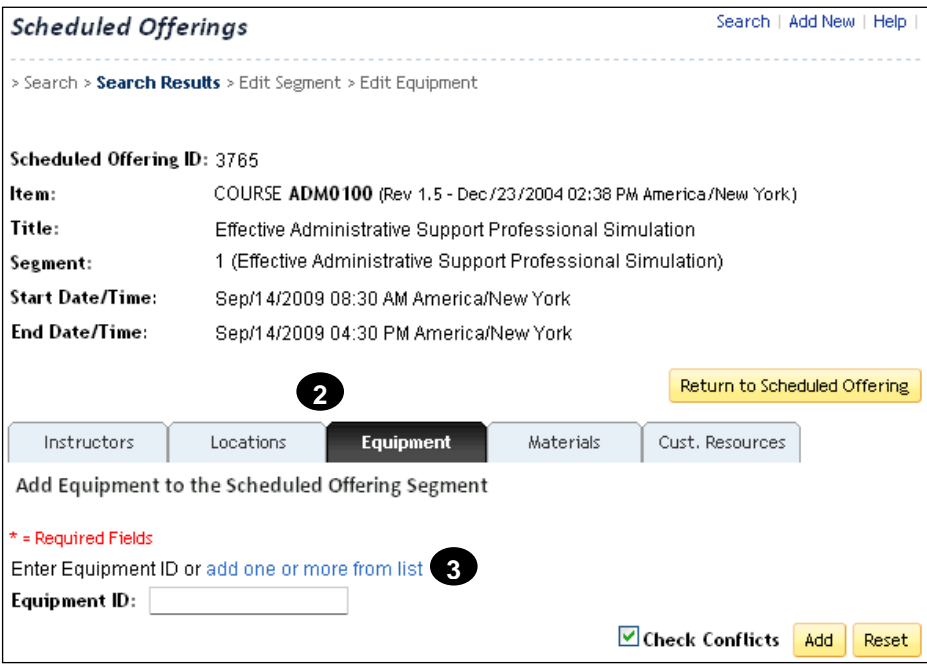


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Add Additional Segments

<p>1 Click the scheduled offering Segments tab.</p>	
<p>2 Scroll down to view the existing segment(s).</p> <p>2 Choose a segment to copy and click Copy Daily Segments.</p>	
<p>3 Enter a number of times to copy.</p> <p>4 Select the Check Conflicts and/or Send Notification checkboxes.</p> <p>5 Click Copy.</p>	

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Add Additional Resources	
<p>1 For the segment you wish to add resources, click Edit Resources.</p>	
<p>2 Select the tab corresponding to the type of resource you wish to add.</p> <p>3 Click the add one or more from list link to search for and add additional resources.</p>	

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.

4 Return to Scheduled Offering

Instructors Locations **Equipment** Materials Cust. Resources

Add Equipment to the Scheduled Offering Segment

* = Required Fields
Enter Equipment ID or add one or more from list
Equipment ID:

Check Conflicts

Edit the Equipment for the Scheduled Offering Segment

Check Conflicts:
[Select All / Deselect All](#)

Equipment ID	Name (Type)	* Start Date (MMM/d/yyyy)	* Start Time (hh:mm AM/PM)	* End Date (MMM/d/yyyy)	* End Time (hh:mm AM/PM)	Dur.	Remove
POD1	Podium (POD)	Sep/14/2009	08:30 AM	Sep/14/2009	04:30 PM	8.00	<input type="checkbox"/>
LCD1	LCD Projector (LCD)	Sep/14/2009	08:30 AM	Sep/14/2009	04:30 PM	8.00	<input type="checkbox"/>

* Time Zone: America/New York (Eastern Standard Time)

[Select All / Deselect All](#)

Check Conflicts:

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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.

Notification Cost Calculation **Cost Summary** Pricing Catalog Chargeback

Summary Segments Registration Contacts Materials Custom Fields

Edit the Scheduled Offering

* = Required Fields

2

3

- Copy Group Instance
- Copy New Scheduled Offering to the catalog
- Use item default segment day numbers
- Copy to consecutive Days

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.

Copy Single **4**
 Copy Multiple-Daily Based
 Copy Multiple-Weekly Based
 Copy Multiple-Monthly Based

* New Start Date: 08:30 AM America/New York **5**

Copy Single
 Copy Multiple-Daily Based
 Copy Multiple-Weekly Based
 Copy Multiple-Monthly Based

* New Start Date: 08:30 AM America/New York

Schedule every working day(s)

Number of Schedules:
 End after: schedules
 End after:

Include Registration Cut-off Date

6 Next

7 Confirm copy results. Click Copy.

Scheduled Offerings Search | Help |

> Copy Scheduled Offering

Copy the Scheduled Offering

Scheduled Offering ID: 3765
Title: Effective Administrative Support Professional Simulation

Copy Group Instance: No
Copy New Scheduled Offering to the catalog: No
Use item default segment day numbers: No
Copy to consecutive Days: No

New Start Dates: Oct/5/2009 08:30 AM America/New York
 Oct/6/2009 08:30 AM America/New York
 Oct/7/2009 08:30 AM America/New York
 Oct/8/2009 08:30 AM America/New York
 Oct/9/2009 08:30 AM America/New York

Include Registration Cut-off Date: Yes

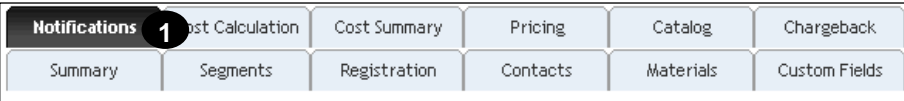
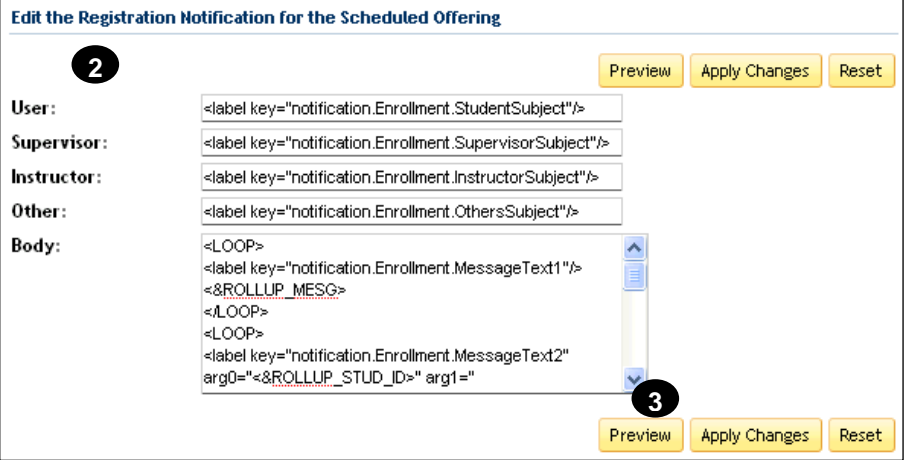
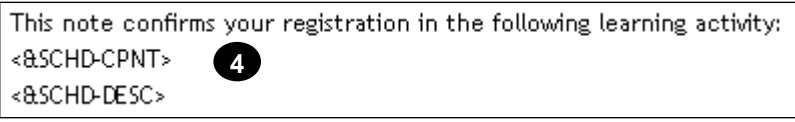
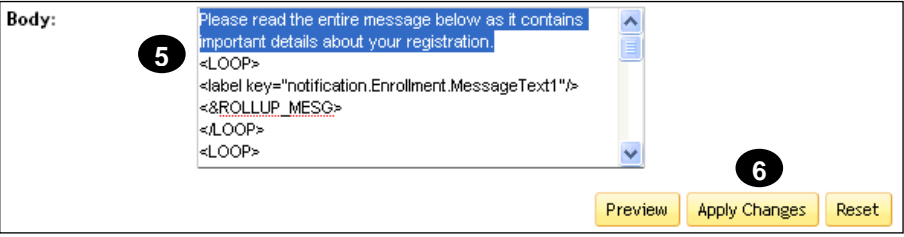
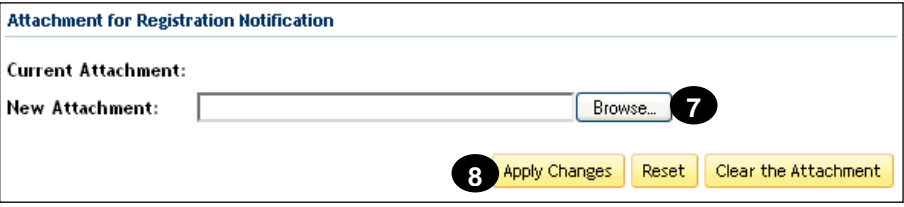
7
 Send Notification: **Copy**

8 Once the copies are created, you can access them with 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](#)

8

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Edit Scheduled Offering Notifications	
<p>1 Select the Notifications tab of the scheduled offering.</p>	
<p>2 Scroll down to view the notification you wish to edit.</p> <p>Note: You may edit the notifications sent by the following triggers:</p> <ul style="list-style-type: none"> - Offering Cancellation - User Registration - User Withdraw - User Waitlist - User Waitlist Removal - User Pending Status <p>Click Preview to view the notification.</p>	
<p>3 In the notification body, you will see syntax tags.</p> <p>4 These indicate a database value that is included in the emails.</p>	
<p>5 To modify the body of the notification, locate the body section and add text.</p> <p>You may remove existing labels and tags, or add text around them.</p> <p>6 Click Apply Changes.</p>	 <p>Note: Click Help for more information on syntax tags and how to use them in notifications.</p>
<p>7 To attach a document to the notification, click Browse to search for and select the document.</p> <p>8 Click Apply Changes.</p>	

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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

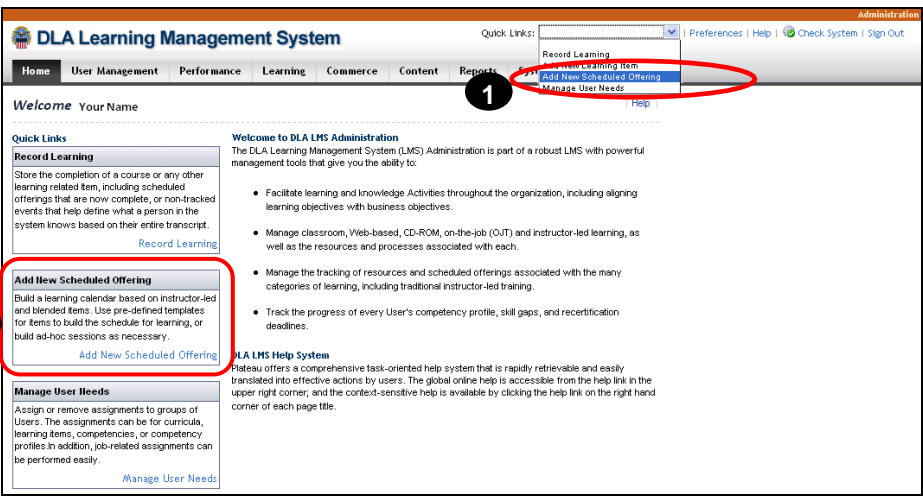
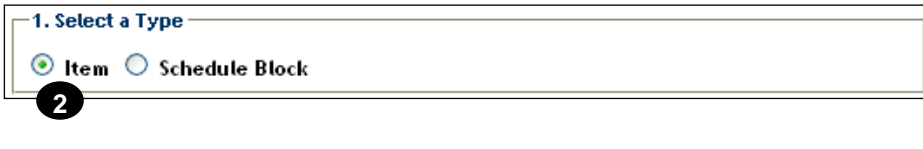
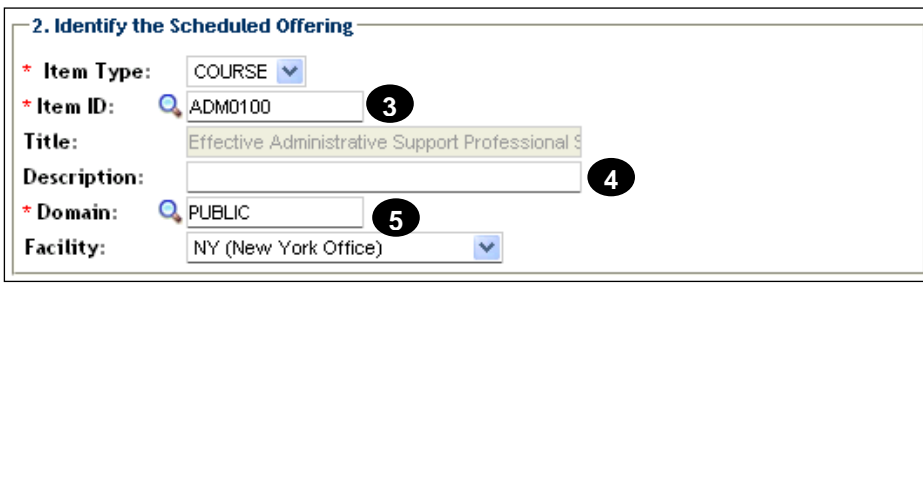
- Create Scheduled Offering
- Add Additional Segments
- Add Additional Resources
- Copy Scheduled Offering
- Edit Scheduled Offering Notifications

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

<p>1 Select Add New Scheduled Offering from the Quick Links drop-down menu or from the Home Page Quick Links.</p>	
<p>2 Select the Item radio button.</p>	
<p>3 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).</p> <p>4 Enter a description of the scheduled offering.</p> <p>5 Specify the appropriate Domain and Facility.</p>	

Create Scheduled Offering Using Quick Link, Continued


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

Calendar Preview


6 << ≤ September 2009 ≥ >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3


Legend :  - Schedule Dates  - Conflict

7 Click the calendar icon  to select a start date. Enter a start time and change the time zone of delivery, if necessary.

3. Set Up the Segment **7**

* **Start Date:** (MMM/d/yyyy)  SEP14/2009



* **Start Time:** (hh:mm AM/PM) 08:30 am



* **Time Zone:** America/New York (Eastern Standard Time) 



8 Select Resources.

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

4. Select Resources **8**


Primary Instructor:  JEDADAMS  not-authorized

Primary Location: CLASS-NY-01 (New York Classroom 01)  

Equipment: LCD1 (LCD Projector)  

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.


Calendar Preview


<< ≤ September 2009 ≥ >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31 9	1	2	3	4	5
6	7	8	9	10	11	12
13	14  	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Legend :  - Schedule Dates  - Conflict

Schedule Date/Time

Start Time	End Time
Sep/14/2009 08:30 AM	Sep/14/2009 04:30 PM 

Resource Usage View: Equipment 

10 Next

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

Warning

Warning Details:

- A conflict was detected for this scheduled offering.
- The instructor(s) are not authorized to teach this item.

Do you wish to proceed?

11
No Yes

Create Scheduled Offering Using Quick Link, Continued

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

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

13 Click Next.

Add New Scheduled Offering Help **13**

Initial Details > Publish > Confirm Previous Next

Select the **Catalogs** that should display the **Scheduled Offering** to users. Catalogs are used to determine which users see what scheduled offering. You will select only from the list of catalogs that contain the item that you are scheduling.

Title: Effective Administrative Support Professional Simulation
Description:
Delivery Dates: Sep/14/2009 08:30 AM - Sep/14/2009 04:30 PM

Related Catalog

List of Selected Catalogs **12** [Remove All]

Catalog ID	Catalog Description	
KSO-GEN	KSO General	Remove
SS	SkillsSoft Course Catalog	Remove
PUBLIC		Remove

Previous Next

Confirm results.

14 Click Submit.

Add New Scheduled Offering Help **14**

Initial Details > Publish > Confirm Previous Submit

Review the Summary of the scheduled offering you are adding to the system. If you are satisfied with data that you have entered, click **Submit** to add the **Scheduled Offering** to the system.

Title: Effective Administrative Support Professional Simulation
Description:
Identifier: COURSE ADM0100 1103830730000
Schedule Segments Information:
 Sep/14/2009 08:30 AM Sep/14/2009 04:30 PM
Resources Used:
 Instructor: JEDADAMS
 Location: CLASS-NY-01
 Equipment: LCD1
Publishing Information
 Publish to 3 Catalog(s)

Catalog ID	Catalog Description
KSO-GEN	KSO General
SS	SkillsSoft Course Catalog
PUBLIC	

View the scheduled offering record.

Scheduled Offerings Search | Add New | Help

> Search > **Search Results** > Edit Summary

Scheduled Offering ID: 3765
Item: COURSE ADM0100 (Rev 1.5 - Dec/23/2004 02:38 PM America/New York)
Title: Effective Administrative Support Professional Simulation

Standard Options

Notifications	Cost Calculation	Cost Summary	Pricing	Catalog	Chargeback
Summary	Segments	Registration	Contacts	Materials	Custom Fields

Edit the Scheduled Offering

* = Required Fields

Apply Changes Reset Copy Scheduled Offering... Delete

[Return to Table of Contents](#)

Add Additional Segments

1 Select the Scheduled Offering Segments tab.

Notifications
Cost Calculation
Cost Summary
Pricing
Catalog
Chargeback

Summary
1 Segments
Registration
Contacts
Materials
Custom Fields

2 Scroll down to view the existing segment(s).

Choose a segment to copy.

2 Click Copy Daily Segments.

[Apply Changes](#) [Reset](#)

Total Hours: 8.00

Segments

Segment 1

* **Start Date** (MMM/d/yyyy) * **End Date** (MMM/d/yyyy)

* **Start Time** (hh:mm AM/PM) * **End Time** (hh:mm AM/PM)

* **Time Zone**

Primary Instructor: **Primary Location:**

Segment Description:

2 [Edit Resources](#) [Copy Resources to All](#) [Copy Daily Segments](#)

Send Notification **Check Conflicts**

[Apply Changes](#) [Reset](#)

3 Enter a number of times to copy.

4 Select to Check Conflicts and/or Send Notification.

5 Click Copy.

[Search](#) | [Add New](#) | [Help](#)

> Search > **Search Results** > Edit Segments > Copy Daily Segments

Scheduled Offering ID: 3765

Item: COURSE **ADMO 100** (Rev 1.5 - Dec/23/2004 02:38 PM America/New York)

Title: Effective Administrative Support Professional Simulation

Selected Date to Copy: Sep/14/2009

[Return to Scheduled Offering](#)

Segments for the Selected Date

Seg#	Segment	Start Date/Time	End Date/Time	Location	Instructor
1	Effective Administrative Support Professional Simulation	Sep/14/2009 08:30 AM America/New York	Sep/14/2009 04:30 PM America/New York	New York Classroom 01	Adams, Jeffrey D

* **Number of Times to Copy:** **3**
(1000)

4 **Check Conflicts:** **Send Notification** **5** [Copy](#) [Reset](#)

[Return to Table of Contents](#)

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.

4 Return to Scheduled Offering

Instructors Locations **Equipment** Materials Cust. Resources

Add Equipment to the Scheduled Offering Segment

* = Required Fields

Enter Equipment ID or add one or more from list

Equipment ID:

Check Conflicts

Edit the Equipment for the Scheduled Offering Segment

Check Conflicts: [Select All / Deselect All](#)

Equipment ID	Name (Type)	* Start Date (MMM/d/yyyy)	* Start Time (hh:mm AM/PM)	* End Date (MMM/d/yyyy)	* End Time (hh:mm AM/PM)	Dur.	Remove
POD1	Podium (POD)	Sep/14/2009	08:30 AM	Sep/14/2009	04:30 PM	8.00	<input type="checkbox"/>
LCD1	LCD Projector (LCD)	Sep/14/2009	08:30 AM	Sep/14/2009	04:30 PM	8.00	<input type="checkbox"/>

* Time Zone: America/New York (Eastern Standard Time)

Check Conflicts [Select All / Deselect All](#)

[Return to Table of Contents](#)

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.

1 Notifications Cost Calculation Cost Summary Pricing Catalog Chargeback

Summary Segments Registration Contacts Materials Custom Fields

Edit the Scheduled Offering

* = Required Fields

2


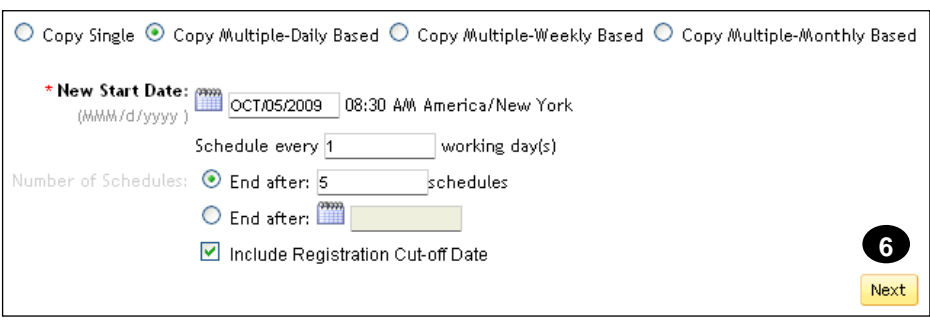
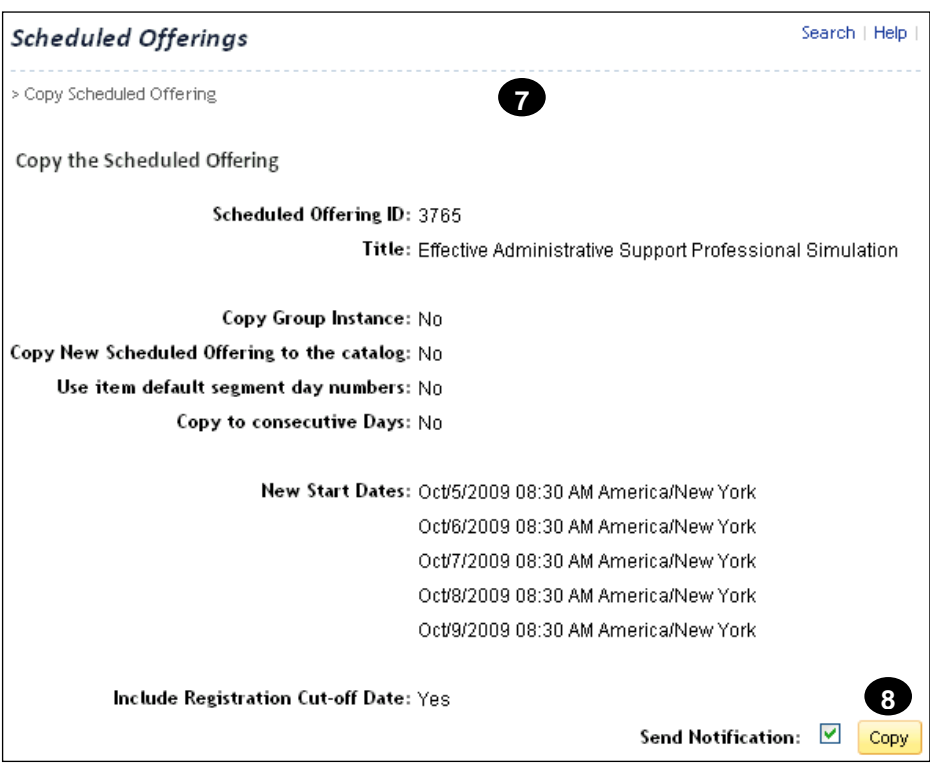
3

Copy Group Instance

Copy New Scheduled Offering to the catalog

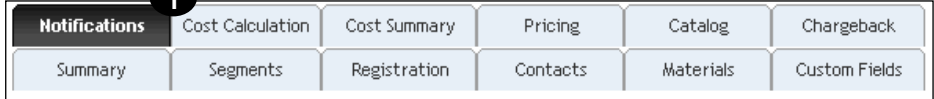
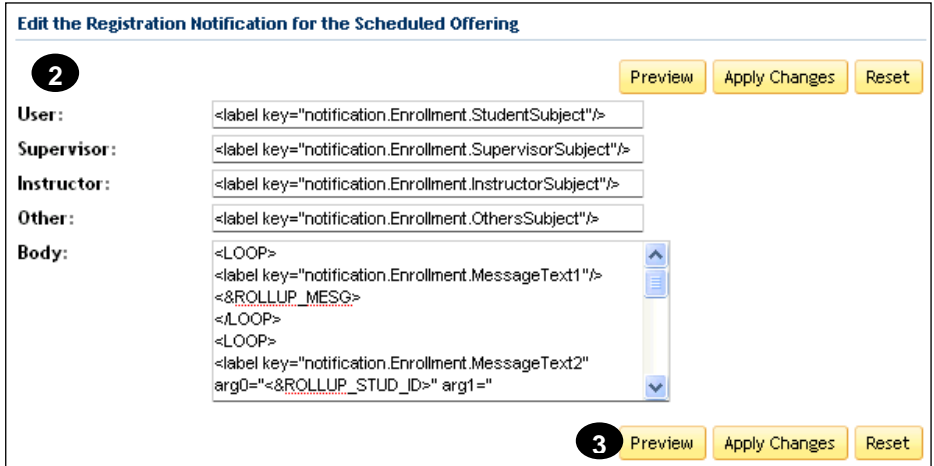
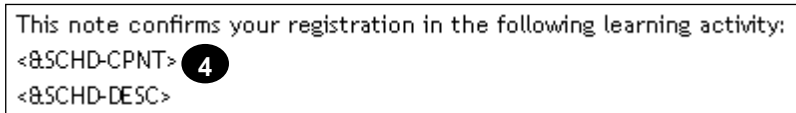
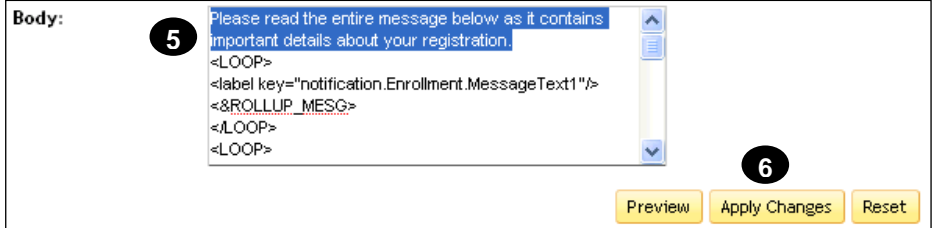
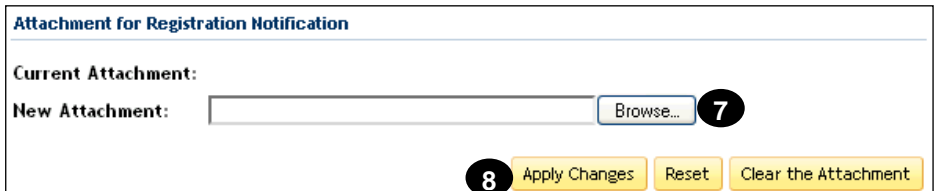
Use item default segment day numbers

Copy to consecutive Days

Copy Scheduled Offering, Continued	
<p>4 Click the radio button to select the copy frequency.</p> <p>5 Select the first scheduled offering start date.</p>	 <p>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.</p>
<p>6 Click Next.</p>	
<p>7 Confirm copy results.</p> <p>8 Click Copy.</p>	

Copy Scheduled Offering, Continued	
<p><u>Note</u>: Once the copies are created, you can access them using the links on the final screen.</p>	<p>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</p>

[Return to Table of Contents](#)

Edit Scheduled Offering Notifications	
<p>1 Select the Notifications tab of the scheduled offering.</p>	
<p>2 Scroll down to view the notification you wish to edit.</p> <p>Note: You may edit the notifications sent by the following triggers:</p> <ul style="list-style-type: none"> - Offering Cancellation - User Registration - User Withdraw - User Waitlist - User Waitlist Removal - User Pending Status <p>3 Click Preview to view the notification.</p>	
<p>4 Note: In the notification preview, you will see syntax tags. These indicate a database value that is included in the emails.</p>	
<p>5 To modify the body of the notification, locate the body section and add text.</p> <p>Note: You may remove existing labels and tags, or add text around them.</p> <p>6 Click Apply Changes.</p>	
<p>7 To attach a document to the notification, click the Browse button to search for and select it.</p> <p>8 Click Apply Changes.</p>	

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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.

The screenshot displays the 'DLA Learning Management System' interface. The top navigation bar includes 'Home', 'User Management', 'Performance', 'Learning', 'Commerce', 'Content', 'Reports', and 'System Admin'. The 'Learning' tab is selected. On the left, a sidebar menu lists various categories: Items, Scheduled Offerings, Classes, Group Instances, Curricula, Requirements, Tools, Resources, and References. The main content area is titled 'Scheduled Offerings' and contains a search form. The search form includes a search bar, a 'Saved Searches' dropdown, and several search criteria fields: 'Case sensitive search' (radio buttons for Yes/No), 'Offering Type' (radio buttons for Item offering type, Schedule Block offering type, Both), 'Scheduled Offering ID' (dropdown for Starts With and an input field), 'Item/Schedule Block ID' (dropdown for Starts With and an input field), 'Description' (dropdown for Starts With and an input field), 'Start Date After' (calendar icon and input field with '7/20/2010'), 'Start Date Before' (calendar icon and input field), and 'Status' (radio buttons for Active, Not Active, Both). At the bottom of the search form are 'Add/Remove Criteria', 'Search', 'Save As', and 'Reset' buttons.

Set Self Registration Parameters, Continued

2 Click the edit icon  for the scheduled offering.

Field Chooser 

Grid View **Calendar View**

Scheduled Offering ID	Item/Schedule Block	Title	Start Date/Time ▲	End Date/Time
3585	COURSE EHS-113 (Rev May/14/2003 12:00 AM America/New York)	Initial CPR Training	Aug/17/2009 09:00 PM America/New York	Aug/18/2009 05:00 AM America/New York
3586	COURSE EHS-100 (Rev May/14/2003 12:00 AM America/New York)	CPR Recertification	Aug/19/2009 09:00 PM America/New York	Aug/20/2009 05:00 AM America/New York
3587	COURSE EHS-116 (Rev May/14/2003 12:00 AM America/New York)	Medical Services & First Aid	Aug/21/2009 09:00 PM America/New York	Aug/24/2009 05:00 AM America/New York

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

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

Scheduled Offerings [Sea](#)

> Search > **Search Results** > Edit Summary

Scheduled Offering ID: 3587

Item: COURSE **EHS-116** (Rev 1 - May/14/2003 12:00 AM America/New York)

Title: Medical Services & First Aid

[Standard Options](#)

Notifications **3** Cost Calculation Cost Summary Pricing Catalog Chargeback

Summary Segments Registration Contacts Materials Custom Fields

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**.

Edit the Registration for the Scheduled Offering

Registration Cut-off Date: **4**
(MMM/d/yyyy)

Registration Cut-off Time:
(hh:mm AM/PM)

5 **Minimum Registration:**
(1000)

Maximum Registration:
(1000)

Time Zone: America/New York (Eastern Standard Time) **Registration Status:** enrolled, waitlisted

Published Price: 0.00 US Dollar (USD) (Default)

Self Registration **6**

7 **Apply Changes** **Reset** **Copy Scheduled Offering...** **Delete**

[Return to Table of Contents](#)

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**.

Summary Segments Registration Contacts Materials Custom Fields

Edit the Scheduled Offering

* = Required Fields

Apply Changes Reset Copy Scheduled Offering... Delete

Description:

Group Instance:

* Domain:

Facility:

* Time Zone: Show in this Time Zone

Approval Process ID:

Approval Required:

Contact:

Email:

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**.

Notifications Cost Calculation Cost Summary Pricing Catalog Chargeback

Summary Segments **Registration** Contacts Materials Custom Fields

Edit the Scheduled Offering

Add a User to the Scheduled Offering Registration

Enter criteria or **add one or more from list** You can also **add from request list**. Enter either Chargeback Account(s) and Price or an Order Ticket.

User ID: Registration Status: Slot ID:

Chargeback Account(s): Price: US Dollar(USD) Order Ticket:

Email confirmations to: User Instructor Supervisor Contacts **Add**

User	Registration Status	Slot ID	Chargeback Account	Price (1000)	Order Ticket	Add
WESABER Aber, Wendy S	<input type="text" value="ENROLL(Enrolled)"/>		<input type="text"/>	0.00	US Dollar(USD)	<input type="checkbox"/>
TOCABERTS Aberts, Todd C	<input type="text" value="ENROLL(Enrolled)"/>		<input type="text"/>	0.00	US Dollar(USD)	<input type="checkbox"/>

Email confirmations to: User Instructor Supervisor Contacts **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.

[Return to Table of Contents](#)

Add Slots to an Offering																	
<p>1 Select the Registration tab of the scheduled offering.</p>																	
<p>2 Scroll down to the <i>Add Slots to the Scheduled Offering</i> section of the screen.</p> <p>3 Click the search icon to search for and select the organization reserving slots.</p> <p>4 Enter a number of slot reservations.</p> <p>5 Check the email confirmation checkbox, if desired.</p> <p>6 Click Add.</p>																	
<p>Slots have been reserved for this organization. Note the Slot ID.</p>	<table border="1"> <thead> <tr> <th>Slot ID</th> <th>Organization</th> <th>Slots Reserved</th> <th>Slots Used</th> <th>Reservation Date (MM/dd/yyyy) Time (hh:mm AM/PM) Time Zone</th> <th>Chargeback</th> <th>Assigned Order Ticket</th> <th>Remove</th> </tr> </thead> <tbody> <tr> <td>116</td> <td>EU-STEEL Europe Steel</td> <td>3</td> <td>0</td> <td>Aug/11/2009 04:17 PM America/New York (Eastern Standard Time)</td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Slot ID	Organization	Slots Reserved	Slots Used	Reservation Date (MM/dd/yyyy) Time (hh:mm AM/PM) Time Zone	Chargeback	Assigned Order Ticket	Remove	116	EU-STEEL Europe Steel	3	0	Aug/11/2009 04:17 PM America/New York (Eastern Standard Time)			<input type="checkbox"/>
Slot ID	Organization	Slots Reserved	Slots Used	Reservation Date (MM/dd/yyyy) Time (hh:mm AM/PM) Time Zone	Chargeback	Assigned Order Ticket	Remove										
116	EU-STEEL Europe Steel	3	0	Aug/11/2009 04:17 PM America/New York (Eastern Standard Time)			<input type="checkbox"/>										

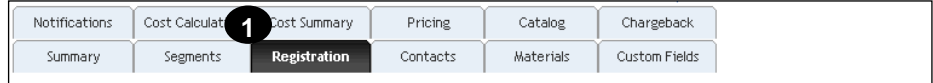
[Return to Table of Contents](#)

Reserve Slots in an Offering	
<p>1 Select the Registration tab of the scheduled offering.</p> <p>Scroll down to the <i>Add a User</i> section.</p> <p>2 Click the add one or more from list link to search for and select users to register.</p>	
<p>3 Select the user Registration Status.</p> <p>4 Select Slot ID to use.</p> <p>5 Check the Add checkbox.</p> <p>6 Select notification preferences.</p> <p>7 Click Add.</p>	
<p>The user has been registered in the scheduled offering, using one slot.</p>	

[Return to Table of Contents](#)

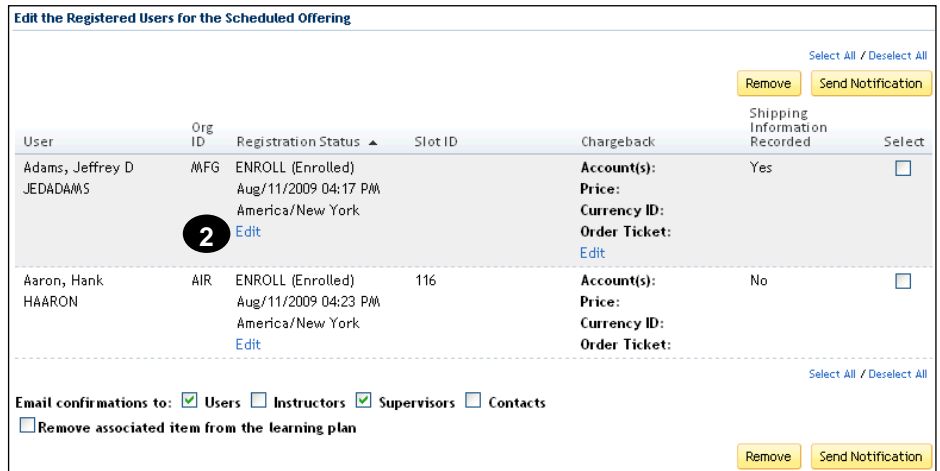
Change Registration Status of User

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.



Note: 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**.

Note: 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.

Scheduled Offering ID: 3605
Title: Management Policies and Procedures
Item Type: COURSE
Item ID: HR-1501
Revision Date: May14/2003 12:00 AM America/New York
Revision Number: 1.2

5 [Back to Main Record](#)

[Standard Options](#)

Notifications	Cost Calculation	Cost Summary	Pricing	Catalog	Chargeback
Summary	Segments	Registration	Contacts	Materials	Custom Fields

Edit Registered User Details for Scheduled Offering 3605

User ID: JEDADAMS **User Name:** Adams, Jeffrey D

Slot ID:

Registration Status: CANCELLED(Cancelled) **3**

Registration Date: CANCELLED(Cancelled)
(MMM/d/yyyy) ENROLL(Enrolled)
WAITLIST(Waitlisted)

Registration Time: 04:17 PM
(hh:mm AM/PM)

Time Zone: America/New York (Eastern Standard Time)

Comments:

Send confirmation notification to: User Instructor Supervisor Contacts

4 [Apply Changes](#) [Reset](#)

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	<input type="checkbox"/>
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	<input type="checkbox"/>

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	<input type="checkbox"/>
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	<input type="checkbox"/>
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:	Yes	<input type="checkbox"/>
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:	Yes	<input type="checkbox"/>

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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

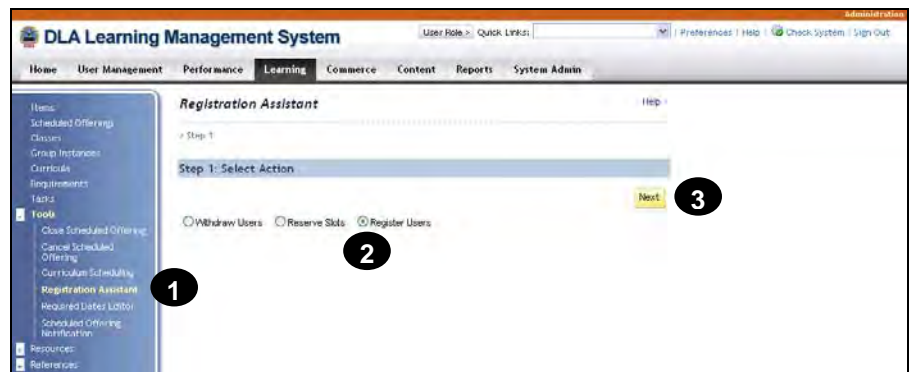
Use Registration Assistant to Register Users in a Scheduled Offering

1 Navigate to Learning > Tools > Registration Assistant.

Step 1: Select Action of the Registration Assistant displays.

2 Select Register Users.


3 Click Next.



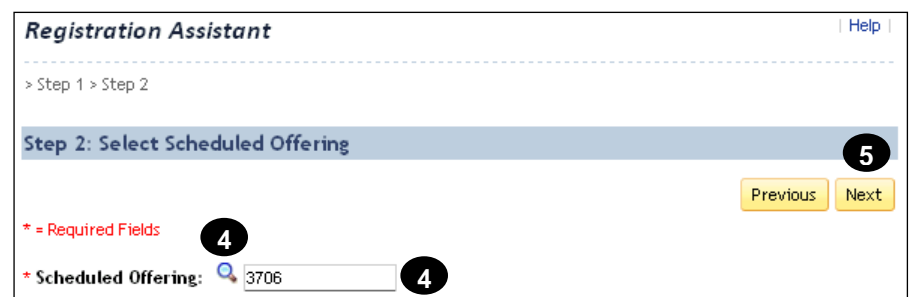
Step 2: Select Scheduled Offering of the Registration Assistant displays.

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.

Registration Assistant | Help |

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5

Step 5: Edit Financial Data **14**

Previous Next

For each seat either select an available slot, or enter an order ticket or enter the chargeback accounts and the price for the seat. Chargeback accounts and a price cannot be entered for Users who do not have a shopping account or for non-item scheduled offerings.

13

User	Slot ID	or	Order Ticket	or	Chargeback Account(s)	Price (1000)	Currency
HAARON Aaron, Henry	None		<input type="text"/>		<input type="text"/>	0.00	US Dollar(USD) ▼
Edit							
LYEABEL Abel, Lyndsey E	None		<input type="text"/>		<input type="text"/>	0.00	US Dollar(USD) ▼
Edit							
WESABER Aber, Wendy S	None		<input type="text"/>		<input type="text"/>	0.00	US Dollar(USD) ▼
Edit							

Step 6: Record Registration of the Registration Assistant displays.

15 Review information.

16 Select applicable email confirmation options.

17 Click Finish.

Registration Assistant | Help |

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6

Step 6: Record Registration **17**

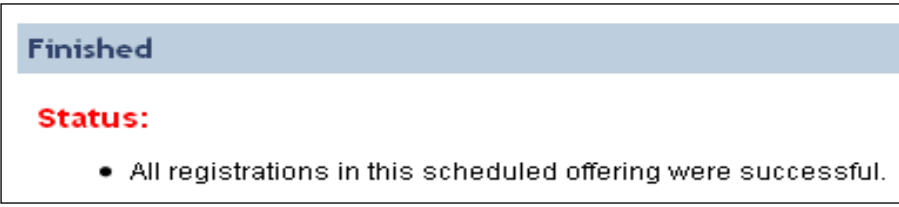
Previous Finish

15

Offering ID: 3706
Title: Plateau Database Architecture
Item Type: COURSE
Item ID: PLA-103
Revision Date: May/14/2003 12:00 AM America/New York
Start Date: Aug/17/2009 09:00 AM America/New York

User ID	User Name	Registration Status	Reservation Date
HAARON	Aaron, Henry	ENROLL(Enrolled)	Aug/12/2009 02:03 PM America/New_York
Price : 0.00 US Dollar(USD)			
LYEABEL	Abel, Lyndsey E	ENROLL(Enrolled)	Aug/12/2009 02:03 PM America/New_York
Price : 0.00 US Dollar(USD)			
WESABER	Aber, Wendy S	ENROLL(Enrolled)	Aug/12/2009 02:03 PM America/New_York
Price : 0.00 US Dollar(USD)			

Email confirmations to: Users Instructors Supervisors Contacts **16**

Use Registration Assistant to Register Users in a Scheduled Offering, Continued	
A confirmation status notification displays.	 <p>Finished</p> <p>Status:</p> <ul style="list-style-type: none">• All registrations in this scheduled offering were successful.

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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.



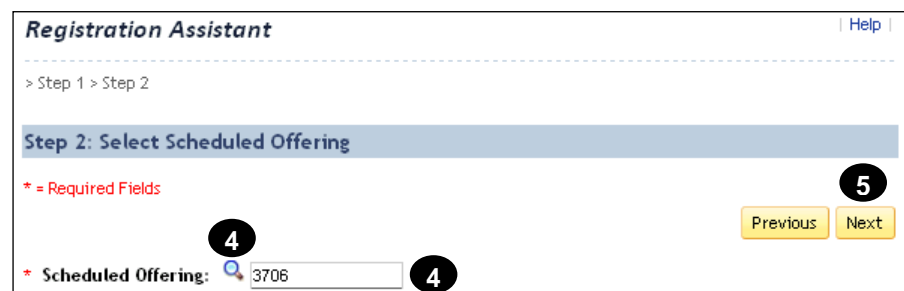
Step 2: Select Scheduled Offering of the Registration Assistant displays.

4 Enter scheduled offering ID.

or

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

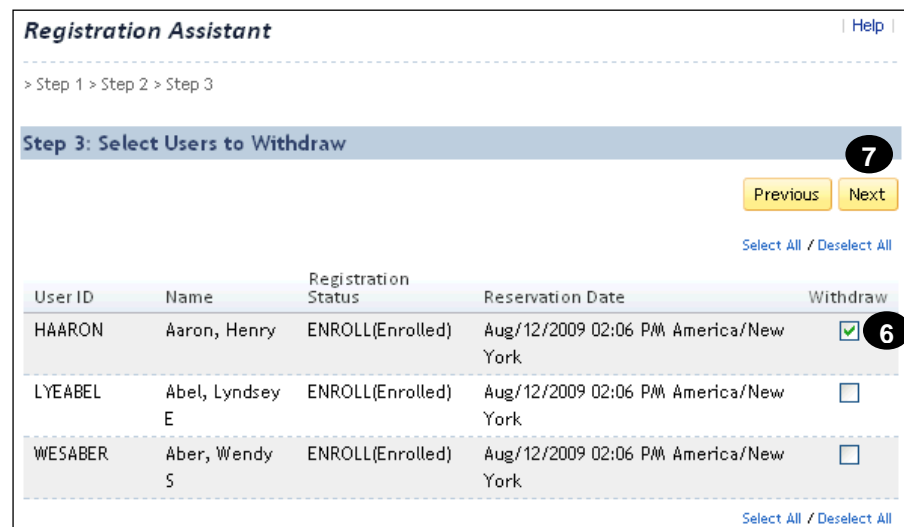
5 Click Next.



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

<p>8 Step 4: Record Withdraw of the Registration Assistant displays.</p>	
<p>8 Review information on user to be withdrawn.</p>	
<p>9 Click Finish.</p>	

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Use Registration Assistant to Add Slots in a Scheduled Offering

<p>1 Navigate to Learning > Tools > Registration Assistant.</p>	
<p>2 Select Reserve Slots.</p>	
<p>3 Click Next.</p>	
<p>4 Enter scheduled offering ID.</p>	
<p>or</p>	
<p>4 Select the search icon to search for and select a scheduled offering.</p>	
<p>5 Click Next.</p>	

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

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

or

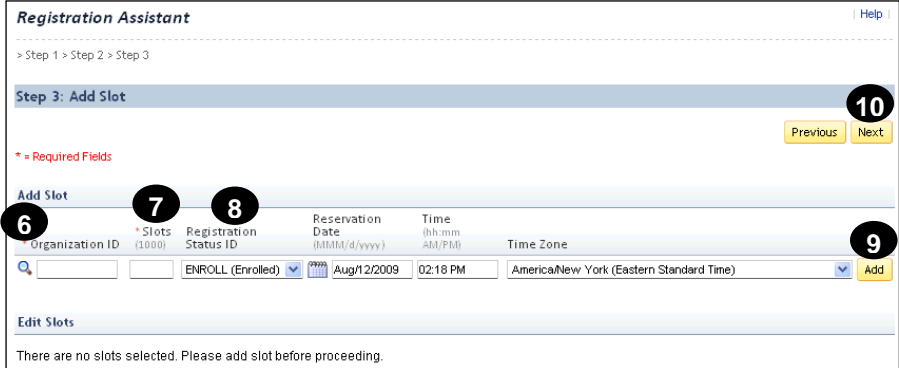
6 Select the search icon  to search for and select an Organization ID.

7 Enter number of slots.

8 Select Registration Status ID from drop-down menu.

9 Click Add.

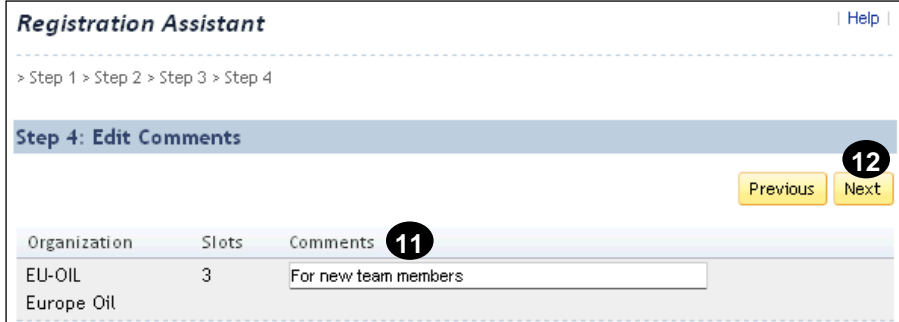
10 Click Next.



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.

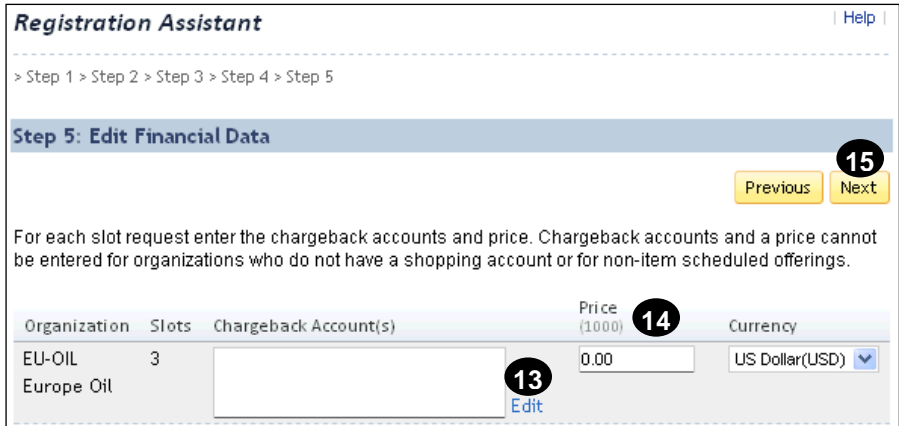


Skip to Step 15 if no financial data is necessary.

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.

Registration Assistant [Help](#)

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6

Step 6: Record Registration **18**

16 Previous Finish

Offering ID: 3706
Title: Plateau Database Architecture
Item Type: COURSE
Item ID: PLA-103
Revision Date: May/14/2003 12:00 AM America/New York
Start Date: Aug/17/2009 09:00 AM America/New York

Organization	Slots	Registration Status ID	Reservation Date
EU-OIL Europe Oil	3	ENROLL(Enrolled)	Aug/12/2009 02:18 PM America/New_York

Comments: For new team members
Price : 0.00 US Dollar(USD)

Email confirmations to Organizations **17**

A confirmation status notification displays.

Finished

Status:

- All slot reservations in this scheduled offering were successful.

[Return to Table of Contents](#)

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.

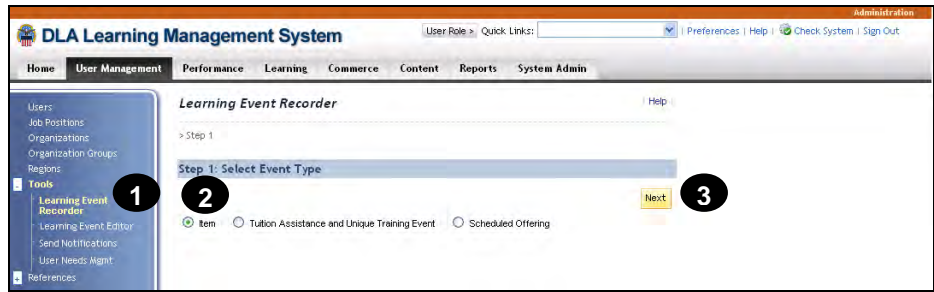
Use Learning Event Recorder to Record Completion of Item

1 Navigate to User Management > Tools > Learning Event Recorder.

Step 1: Select Event Type of the Learning Event Recorder wizard displays.

2 Select the Item option.

3 Click Next.




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

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

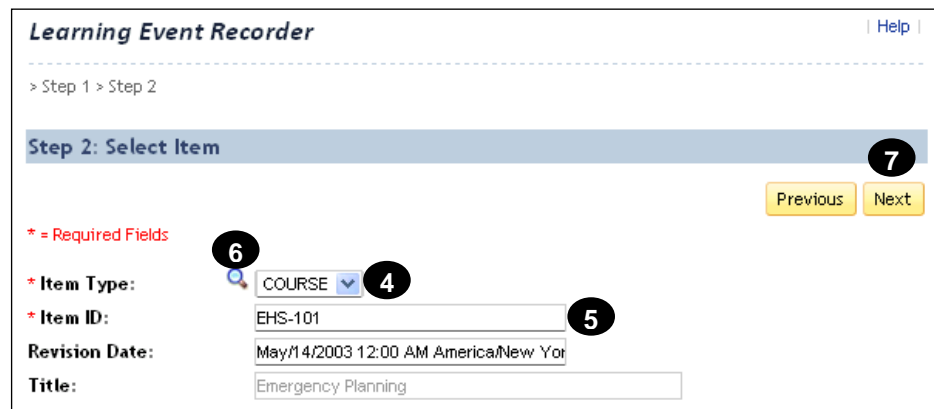
4 Select the item type from the drop-down menu.

5 Enter the Item ID in the textbox exactly.

or

6 Click the select icon  to search for an item.

7 Click Next.



Note: By selecting to search for an item, all relevant information will be auto-populated into the fields.

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.

Learning Event Recorder | [Help](#)

> Step 1 > Step 2 > Step 3

Step 3: Enter Learning Event Information **9**

*** = Required Fields** **8**

Item: COURSE **EHS-101** (Rev 1.2 - May/14/2003 12:00 AM America/New York)
Title: Emergency Planning

Instructor:

Default Grade:

*** Default Completion Status:**

*** Completion Date:** (MMM/d/yyyy)

*** Completion Time:** (hh:mm AM/PM)

*** Time Zone:** America/New York (Eastern Standard Time)

Default Price (\$): (1000)

Currency ID: US Dollar (USD)

Total Hours: (1000)

Credit Hours: (1000) 8.00

Contact Hours: (1000)

CPE: (1000) 3.00

[Previous](#) [Next](#)

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.

Learning Event Recorder | [Help](#)

> Step 1 > Step 2 > Step 3 > Step 4

Step 4: Select Users

*** = Required Fields**

Add Users

Enter User ID or **add one or more from list** **12**

*** User ID:** **10** **11** [Add](#)

Edit Selected Users

There are no Users in the list. Please add Users before proceeding.

[Previous](#) [Next](#)

Use Learning Event Recorder to Record Completion of Item, Continued

- 13 Once all users have been added, confirm list.
- 14 Click Next.

Learning Event Recorder | Help

> Step 1 > Step 2 > Step 3 > Step 4

Step 4: Select Users

Previous Next

* = Required Fields

Add Users

Enter User ID or [add one or more from list](#)

* User ID: Add

Edit Selected Users

Apply Changes

Select All / Deselect All

User ID	Name	Remove
MINABRAMS	Abrams, Michelle N	<input type="checkbox"/>
CHACKERMAN	Ackerman, Christopher	<input type="checkbox"/>
JEDADAMS	Adams, Jeffrey D	<input type="checkbox"/>

Select All / Deselect All

Apply Changes

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.

Learning Event Recorder | Help

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5

Step 5: Edit User Event Information

Previous Next

User	Comments	Grade	Status
MINABRAMS (Abrams, Michelle N)	Still needs to cc	<input type="text"/>	CRS-ATND (Attended Event or Activity) - For Credit
CHACKERMAN (Ackerman, Christopher)	<input type="text"/>	<input type="text"/>	CRS-ATND (Attended Event or Activity) - For Credit
JEDADAMS (Adams, Jeffrey D)	<input type="text"/>	<input type="text"/>	CRS-ATND (Attended Event or Activity) - For Credit

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.

Learning Event Recorder | Help

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6

Step 6: Edit User Event Financial Information 20

Previous Next

For each User you may either enter the Price and Cost and Profit Centers or you may enter an order ticket.

User	Price (1000,001.01)	Currency	Cost Center Account Codes	Profit Center Account Codes	Order Ticket
12375668 (Newhire, Joey)	0.00	US Dollar (USD)			

Edit

All Costs below are in: US Dollar (USD)

Training_Travel_Cost	
Training_Per_Diem_Cost	
Training_Tuition_And_Fees_Cost	

19

Use Learning Event Recorder to Record Completion of Item, Continued

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

Step 7: Record Event

Previous
Finish
23

Item: COURSE TEST-123 (Rev 7/20/2007 1600 America/New York)

Item Title: Course For Testing LMS

Instructor: Thomas Jefferson

Completion Date: 7/27/2010 1600 America/New York Total Hours: Default Tuition: 0.00 US Dollar (USD)

Contact Hours: CPE: Credit Hours:

Automatically Assess Related Competencies: 21

User	Status	Grade	Price	Cost Centers	Profit Centers	Order Ticket
12375668 (Newhire, Joey)		COURSE SUCCESS (Course Successful)		0.00 US Dollar (USD)		
Comments:						
All Costs below are in: US Dollar (USD)						
Training_Travel_Cost		1200				
Training_Per_Diem_Cost		200				
Training_Tuition_And_Fees_Cost		1500				


- 24 A pop-up may appear requesting that the page refresh before you proceed. Click **OK**.

The page at http://vs2-kso-dev.plateau.internal says:
✕

This action may take more than a few seconds. Please wait for the page to be refreshed.

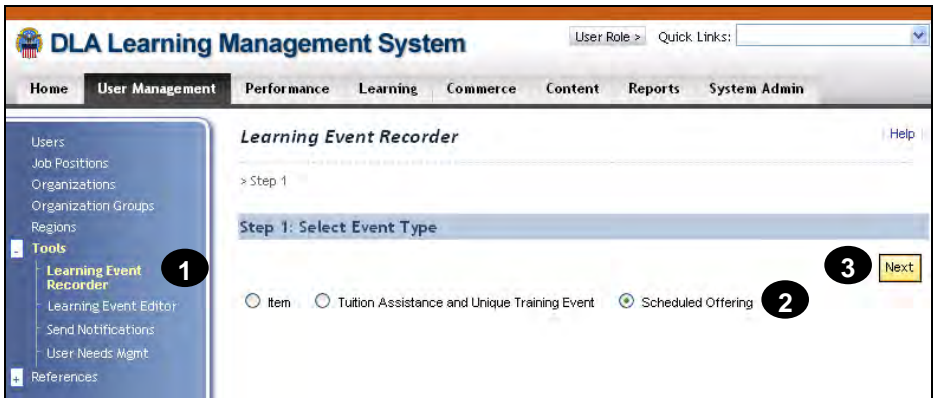
OK
24

Use Learning Event Recorder to Record Completion of Item, Continued




<p>25 Click Print to print a completion certificate report for each user listed.</p> <p>26 Click Email... to email a completion certificate report to each user listed.</p> <p>27 Click Start Over... to begin the Learning Event Recorder process again. This retains all users previously selected.</p>	 <p>Note: The user whose status was changed to 'No Credit' does not appear in the list of users to generate completion certificates.</p>
---	---

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Use Learning Event Recorder to Record Completion of Scheduled Offering

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

Use Learning Event Recorder to Record Completion of Scheduled Offering

<p>4 Enter the Scheduled Offering ID in the textbox exactly.</p> <p>or</p> <p>5 Click the select icon  to search for scheduled offering.</p> <p>6 Click Next.</p>	<div data-bbox="552 262 1469 583"> <p>Learning Event Recorder Help</p> <p>> Step 1 > Step 2</p> <p>Step 2: Select Scheduled Offering 6</p> <p>Previous Next</p> <p>* = Required Fields</p> <p>* Scheduled Offering ID:  <input type="text"/> 4</p> </div> <p>Note: If you search for a scheduled offering, the search screen defaults to search for all offerings prior to today's date.</p>
<p>7 Complete required data fields (*). Additional information such as total hours, or credit hours, can be entered as well.</p> <p>8 Click Next.</p> <p>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.</p>	<div data-bbox="552 861 1469 1705"> <p>Learning Event Recorder Help</p> <p>> Step 1 > Step 2 > Step 3</p> <p>Step 3: Enter Learning Event Information 8</p> <p>Previous Next</p> <p>* = Required Fields 7</p> <p>Item: COURSE EHS-129 (Rev 1.2 - May/14/2003 12:00 AM America/New York)</p> <p>Item Title: Waste Management</p> <p>Instructor:  <input type="text"/></p> <p>Default Grade: <input type="text"/></p> <p>* Default Completion Status: CRS-ATND (Attended Event or Activity) - For Credit</p> <p>Completion Date: Mar/2/1005 04:00 PM America/New York</p> <p>Default Price: <input type="text"/> 0.00 (1000)</p> <p>Currency ID: <input type="text"/> US Dollar (USD)</p> <p>Total Hours: <input type="text"/> 8.00 (1000)</p> <p>Credit Hours: <input type="text"/> 8.00 (1000)</p> <p>Contact Hours: <input type="text"/> (1000)</p> <p>CPE: <input type="text"/> 3.00 (1000)</p> </div>

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.

Learning Event Recorder

[Help](#)

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6

21

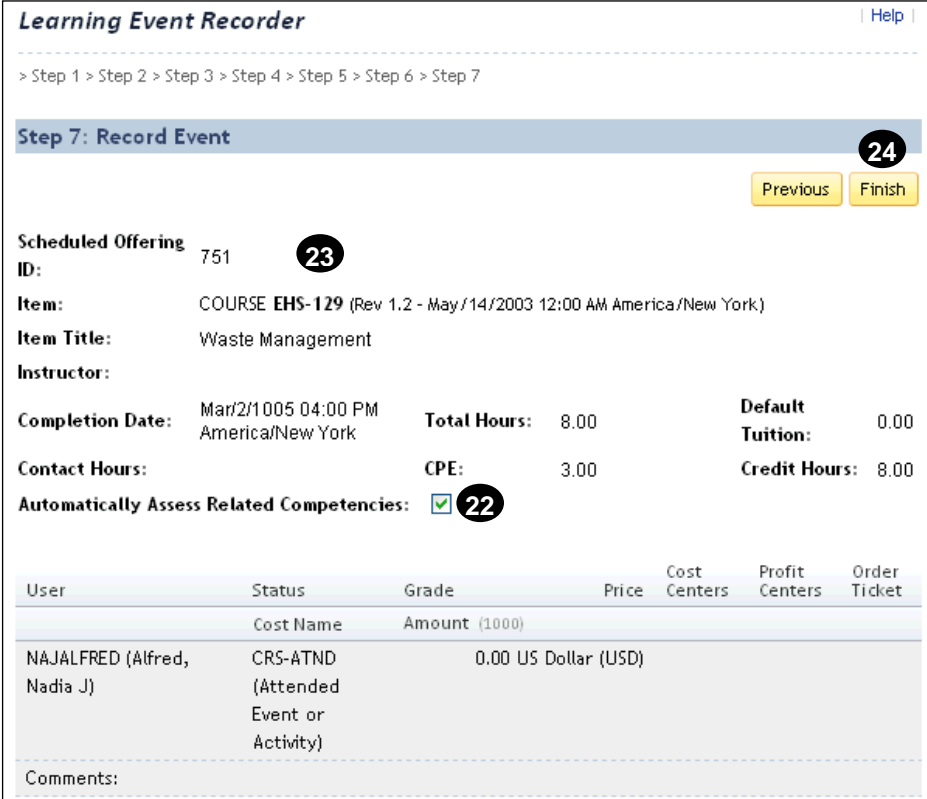
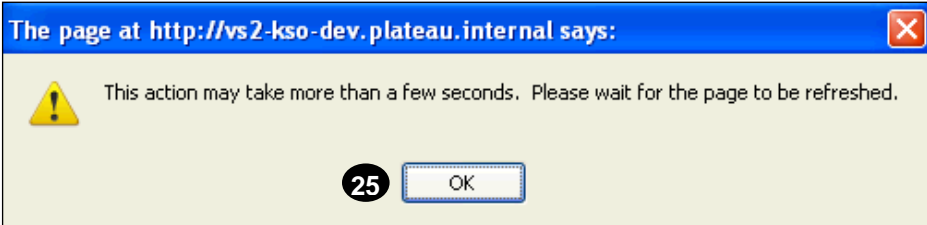
Step 6: Edit User Event Financial Information

[Previous](#) [Next](#)

For each User you may enter the Price and Cost and Profit Centers or you may enter an order ticket.

User	Price (1000,001.01)	Currency	Cost Center Account Codes	Profit Center Account Codes	Order Ticket
12375668 (Newhire, Joey)	<input type="text" value="0.00"/>	<input type="text" value="US Dollar (USD)"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		Edit			
		All Costs below 20 <input type="text" value="US Dollar (USD)"/>			
		Training_Travel_Cost		<input type="text"/>	
		Training_Per_Diem_Cost		<input type="text"/>	
		Training_Tuition_And_Fees_Cost		<input type="text"/>	

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

<p>22 Step 7: Record Event of the Learning Event Recorder wizard displays.</p> <p>23 If competencies need to be assessed as a result of recording the learning event, select the Automatically Assess Related Competencies checkbox.</p> <p>23 Review learning event information.</p> <p>24 Click Finish.</p>	
<p>25 A pop-up may appear requesting that the page refresh before you proceed.</p> <p>25 Click OK.</p>	

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

- 26 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.

Finished

Status:

- The learning event has been successfully recorded.

28
Start Over...

Generate Completion Certificates

Learning event that provide credits have been successfully recorded for the following User(s).

User ID	Name
NAJALFRED	Alfred, Nadia J
MAJALI	Ali, Maria J
AHEALLEN	Allen, Ahava E

26 27
Print **Email...**

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.

DLA Learning Management System

User Role > Quick Links: [dropdown] | Pref

Home **User Management** Performance Learning Commerce Content Reports System Admin

Users Search Add New Help

Search Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes No

User ID: Contains [dropdown] [input]

Last Name: Contains [dropdown] [input]

First Name: Contains [dropdown] [input]

Middle Initial: Contains [dropdown] [input]

Role ID: Contains [dropdown] [input]

User Status: Active Not Active Both

Profile Status: Active Expired Both

Organizations: Contains [dropdown] [input]

Employee Statuses: Contains [dropdown] [input]

Add/Remove Criteria

Search Save As Reset

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

Field Chooser

Send Notification

Select All / Deselect All

User ID	User Name	Notify
MAJALI	Ali, Maria J	<input type="checkbox"/>

- 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.

Standard Options

Surveys	Organization Dashboard	Organization Initiatives	Succession Planning	Alternate Job Positions	Performance Review	SF-182 Requests
Commerce	Account Code	Catalog Preview	Preferences	Approval Role	Approvals	
Cpty Profiles	Competencies	Registration	Requests	Online Status	Assessments	
Summary	Phone Numbers	Custom Fields	Learning Plan	Learning History	Curricula	

View the Learning History for the User

Sort By: Item

Item Title	Status	Completion Date	Details
COURSE EHS-129 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Attended Event or Activity	Mar/2/1005 04:00 PM America/New York	View Details
Waste Management			
COURSE HR-100 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Passed Course	Dec/1/2003 01:21 PM America/New York	View Details
New Employee Orientation			

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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:

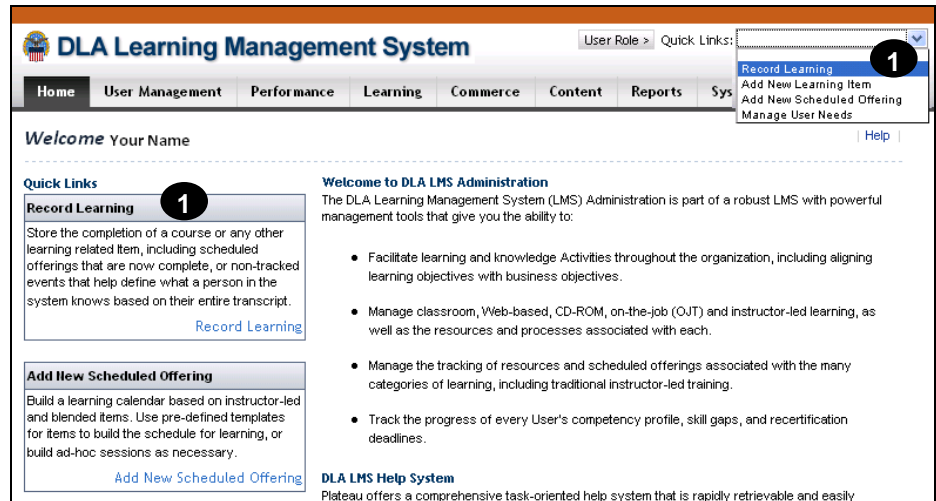
- **Item Based Events:** Items are the primary events found in the list of learning events for users. Learning events for items include those created as scheduled offerings and those with online content where the system records the learning event when the user completes the content. All items may have 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

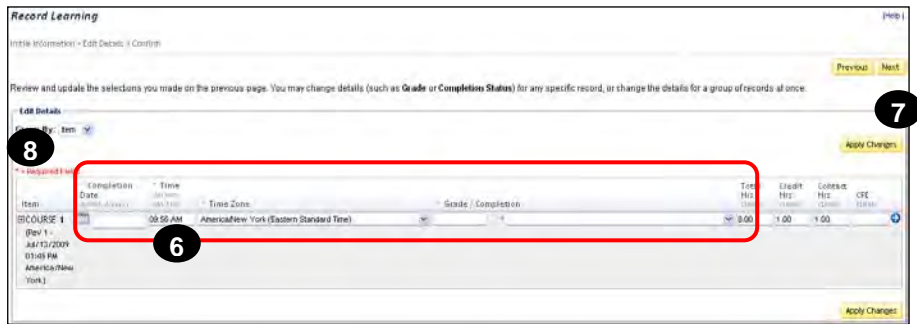
The *Edit Details* page of the Record Learning wizard displays.

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.



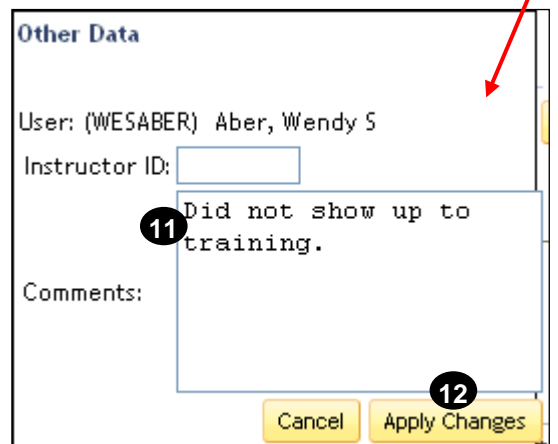
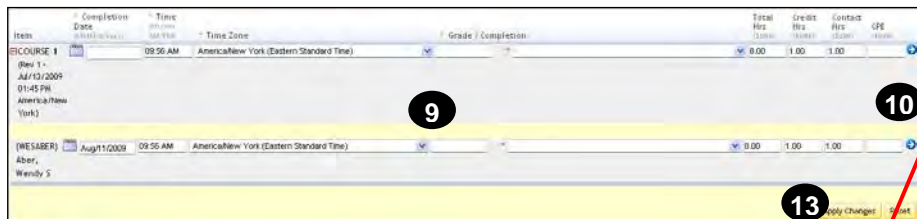
9 Modify individual user records by selecting options from the drop-down menus, or modifying hour fields.

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.

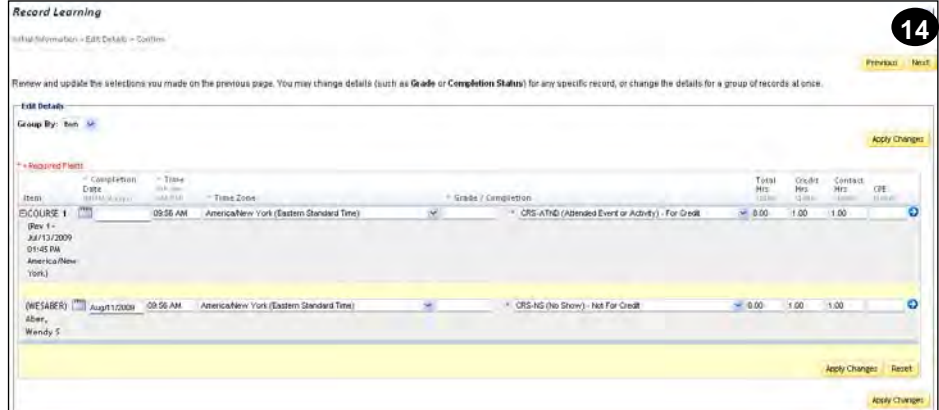
13 Click **Apply Changes** in the expanded view to save individual record changes.



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.

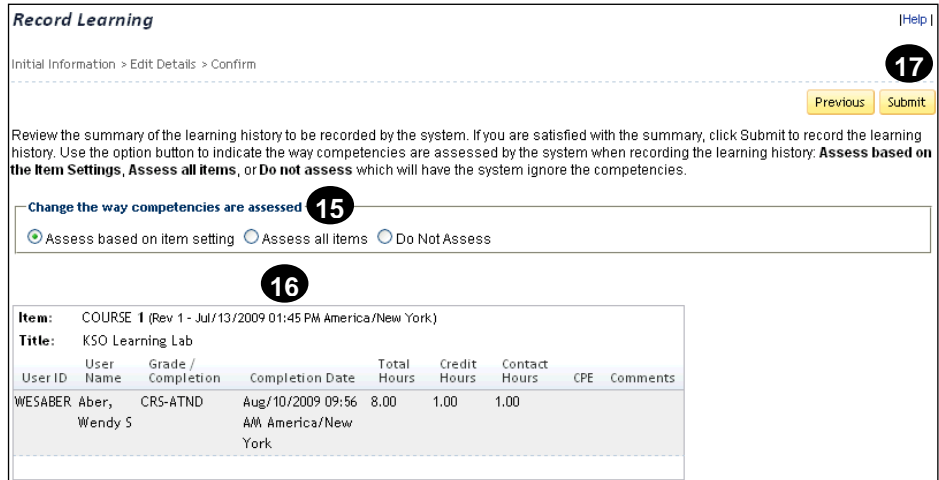


The *Confirm* page of the Record Learning wizard displays.

15 If applicable, select an option for competency assessment.

16 Review list of items and users effected.

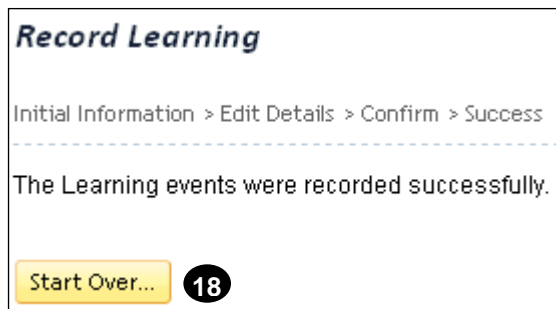
17 Click Submit.



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.



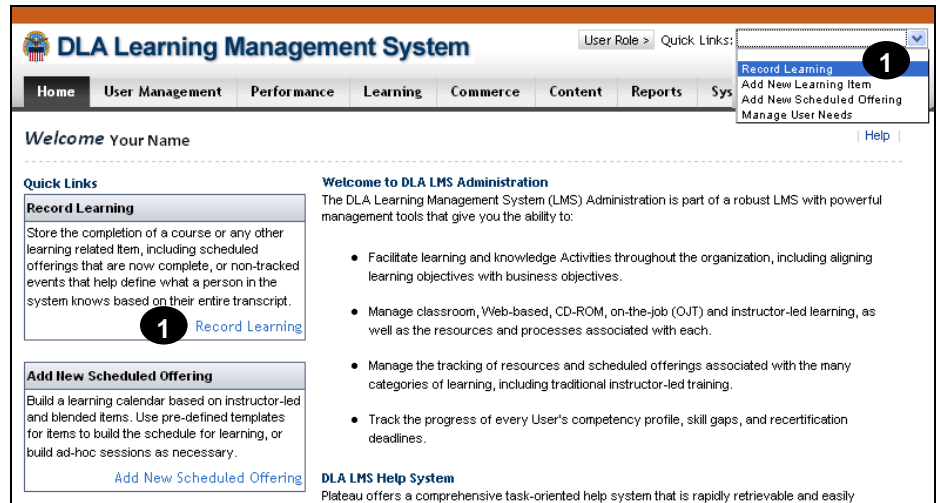
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Use Record Learning Quick Link to Record Completion of Scheduled Offering

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.



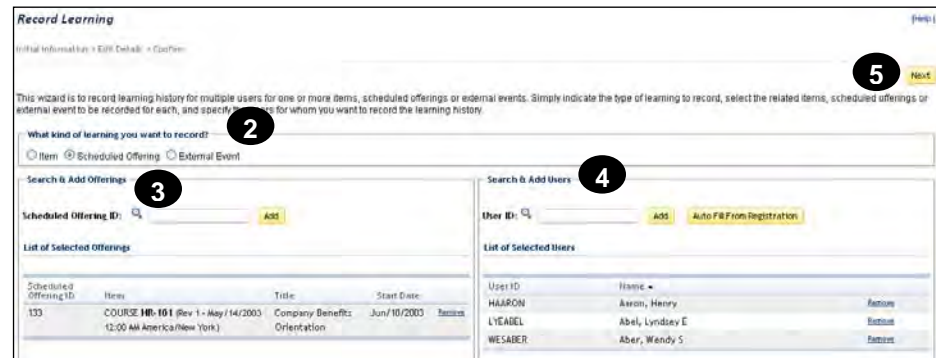
The *Initial Information* page of the Record Learning wizard displays.

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**.

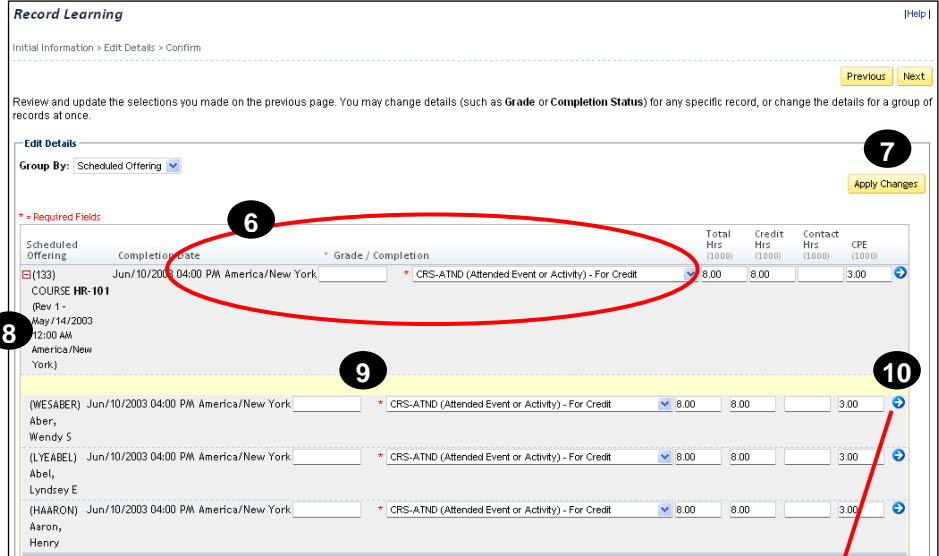
8 To modify individual user records, click the **expand icon**  next to the item ID to view all users.

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.



Record Learning [Help]

Initial Information > Edit Details > Confirm

Review and update the selections you made on the previous page. You may change details (such as **Grade** or **Completion Status**) for any specific record, or change the details for a group of records at once.

Edit Details

Group By: Scheduled Offering

* - Required Fields

Scheduled Offering	Completion Date	Grade / Completion	Total Hrs (1.000)	Credit Hrs (1.000)	Contact Hrs (1.000)	CPE (1.000)
(133) COURSE HR-101 (Rev 1 - May/14/2003 12:00 AM America/New York)	Jun/10/2003 04:00 PM America/New York	* CRS-ATND (Attended Event or Activity) - For Credit	8.00	8.00		3.00
(WESABER) Aber, Wendy S	Jun/10/2003 04:00 PM America/New York	* CRS-ATND (Attended Event or Activity) - For Credit	8.00	8.00		3.00
(LYEABEL) Abel, Lindsey E	Jun/10/2003 04:00 PM America/New York	* CRS-ATND (Attended Event or Activity) - For Credit	8.00	8.00		3.00
(HAARON) Aaron, Henry	Jun/10/2003 04:00 PM America/New York	* CRS-ATND (Attended Event or Activity) - For Credit	8.00	8.00		3.00

Other Data

User: (WESABER) Aber, Wendy S

Instructor ID:

Comments:

11 **Cancel** **Apply 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.

13 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.

DLA Learning Management System

User Role > Quick Links: [] | Pref

Home User Management Performance Learning Commerce Content Reports System Admin

1 Users

Assignment Profiles
Job Positions
Organizations
Organization Groups
Regions

Tools

Learning Event Recorder
Learning Event Editor
Merge Users
Send Notifications
Supervisor Assistant
User Needs Mgmt

References

Users Search Add New Help

Search Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes No

User ID: Contains []

Last Name: Contains [] **2**

First Name: Contains []

Middle Initial: Contains []

Role ID: Contains []

User Status: Active Not Active Both

Profile Status: Active Expired Both

Organizations: Contains []

Employee Statuses: Contains [] **3**

Add/Remove Criteria

Search Save As Reset

4 Click the edit icon to select the user record.

Field Chooser

Send Notification

Select All / Deselect All

Records per Page 25 Page: 1 2 3 4 5 «Previous Next» (3,071 total records) Page 1 of 123. Go

User ID	User Name	Notify
HAARON	Aaron, Henry	<input type="checkbox"/>
LYEABEL	Abel, Lyndsey E	<input type="checkbox"/>
WESABER	Aber, Wendy S	<input type="checkbox"/>

4

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.

Surveys Standard Options

Organization Dashboard	Organization Initiatives	Succession Planning	Alternate Job Positions	Performance Review	SF-182 Requests
Commerce	Account Code	Catalog Preview	Preferences	Approval Role	Approvals
Cpty Profiles	Competencies	Registration	Requests	Online Status	Assessments
Summary	Phone Numbers	Custom Fields	Learning Plan	5 Learning History	Curricula

View the Learning History for the User

Sort By: Item

Item Title	Status	Completion Date	Details
COURSE HR-101 (Rev 1 - May/14/2003 12:00 AM America/New York)	Attended Event or Activity	Jun/10/2003 04:00 PM America/New York	View Details 6
Company Benefits Orientation			

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Send Notifications

Description

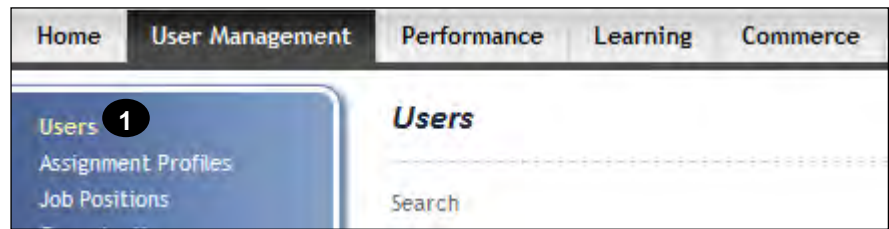
The purpose of this job aid is to guide administrators through the step-by-step process of creating and sending notifications.

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.


A screenshot of the 'Users' search page. The page title is 'Users' with links for 'Search', 'Add New', and 'Help'. Below the title is a search bar and a 'Saved Searches' dropdown. A detailed instruction reads: 'Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.' The search criteria include: 'Case sensitive search' (radio buttons for Yes/No, 'No' is selected), 'User ID', 'Last Name', 'First Name', 'Middle Initial', 'Role ID', 'User Status' (radio buttons for Active/Not Active/Both, 'Active' is selected), 'Domains', 'Organizations' (set to 'EHS'), and 'Supervisors'. At the bottom, there is an 'Add/Remove Criteria' link and three buttons: 'Search' (highlighted with a circled '3'), 'Save As', and 'Reset'.

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

- 4 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**.

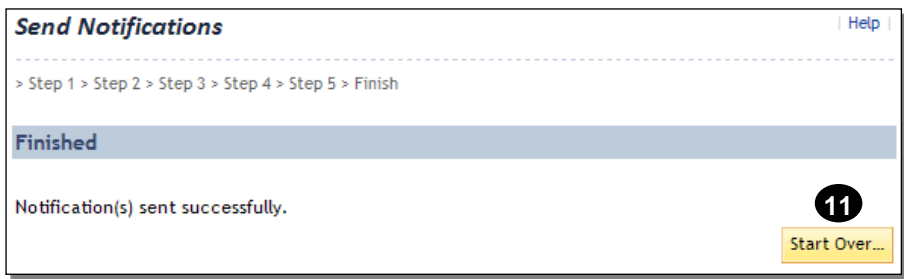
The screenshot shows a table of user search results. At the top right, there is a yellow button labeled 'Send Notification' with a circled '6' next to it. Below it is a link 'Select All / Deselect All' with a circled '5'. On the left side of the table, there is a dropdown menu for 'Records per Page' with a circled '4' above it. The dropdown menu is open, showing options 5, 10, 25, 50, and 500, with 500 selected. The table has columns for 'User ID', 'User Name', and 'Notify'. The 'Notify' column contains checkboxes for each user.

User ID	User Name	Notify
MOJAFZAL	Afzal, Mohammad J	<input type="checkbox"/>
JDALBERTI	Alberti, Jamie D	<input type="checkbox"/>
ERWAMRHEIN	Amrhein, Eric W	<input type="checkbox"/>
MELANDERSON	Anderson, Megan L	<input type="checkbox"/>
SAMARCE	Arce, Sandy M	<input type="checkbox"/>
JEABACO	Baco, Jesse A	<input type="checkbox"/>
KALBAIRD	Baird, Katherine L	<input type="checkbox"/>

- 7 *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**.

The screenshot shows the 'Send Notifications' wizard, Step 5: Build Email. At the top right, there is a 'Help' link. Below it is a breadcrumb trail: '> Step 1 > Step 2 > Step 3 > Step 4 > Step 5'. A red asterisk indicates required fields. There are two yellow buttons: 'Previous' and 'Send Notification' with a circled '10' next to it. The 'Email Template' field has a dropdown menu with 'PasswordNotification' selected and a circled '7' next to it. The 'Specify Email Addresses' section has 'Reply To:' and 'From:' fields, both with 'plateau@plateau.com' entered and a circled '8' next to the 'From:' field. There is a 'Send copies to:' field and a note: 'Note: The above recipients will receive 1 email for each user receiving this notice.' There is a checkbox for 'Second copy of email to users' supervisors:'. The 'Customize Contents' section has an 'Attachment:' field with a 'Browse...' button and a circled '9' next to it. Below it are 'Subject:' and 'Body:' fields with HTML-like placeholders.

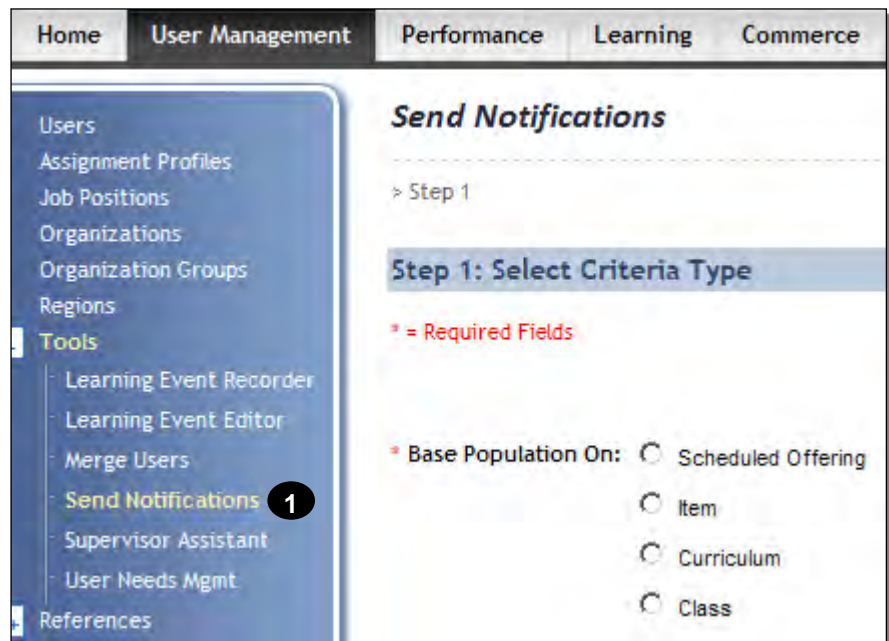
Create and Send Ad-hoc Notifications from User Search Results, Continued

<p>11 You have successfully sent a notification to all selected users.</p> <p>11 Click the Start Over... button to send additional notifications to a user population based on scheduled offering, item, curriculum, or class.</p>	 <p>The screenshot shows a confirmation window titled "Send Notifications" with a "Help" link. A breadcrumb trail reads "> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Finish". A blue bar indicates the process is "Finished". Below this, the text "Notification(s) sent successfully." is displayed. A yellow button labeled "Start Over..." is located in the bottom right corner, with a circled "11" next to it.</p>
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Create and Send Notifications Using Send Notifications Tool

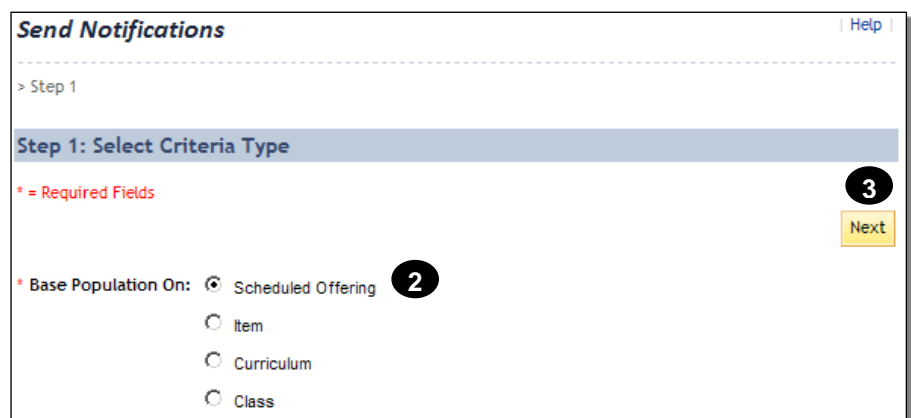
1 Navigate to User Management > Tools > Send Notifications.



Step 1: Select Criteria Type of the Send Notifications wizard displays.

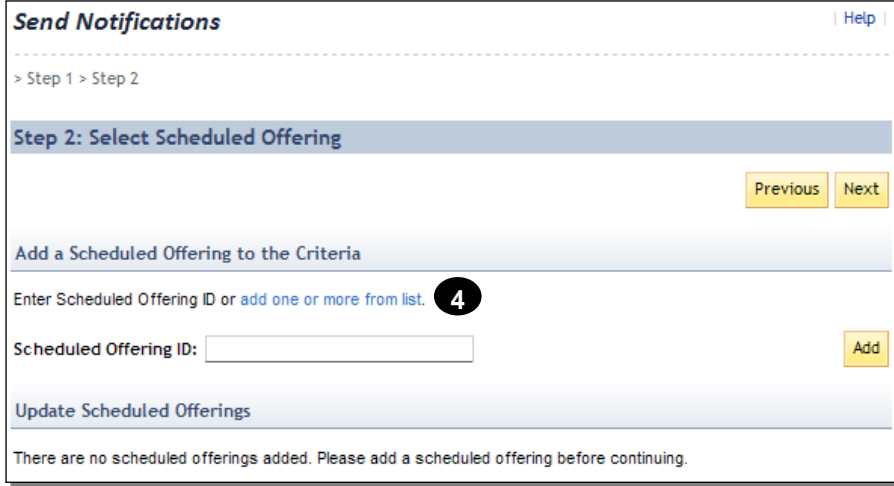
2 Select the criteria type on which the user population is based.

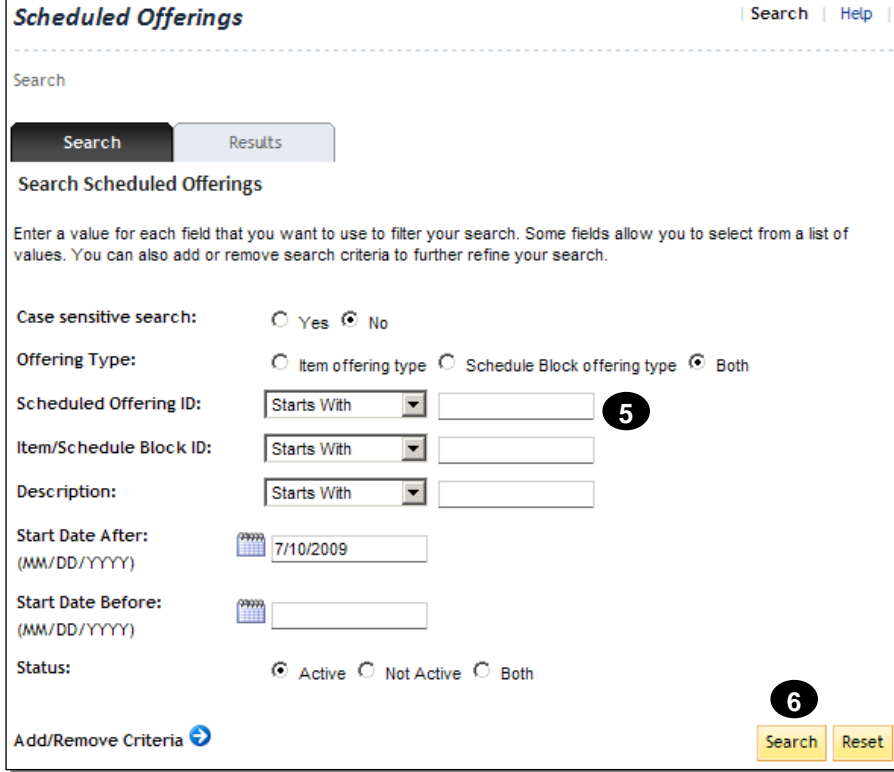
For this example, let's search for all users within a specific scheduled offering.



3 Click Next.

Create and Send Notifications Using Send Notifications Tool, Continued

<p>4 Add a scheduled offering to the criteria by clicking the add one or more from list link to search for the offering.</p>	
--	--

<p>5 Search for a scheduled offering by entering criteria.</p> <p>6 Click Search.</p>	
---	---

Create and Send Notifications Using Send Notifications Tool, Continued

7 Select the scheduled offering by clicking the Add checkbox.

8 Click Add to continue.

Search Results

Select Offerings 8

[Add](#)

Records per Page 25 (14 total records) [Select All / Deselect All](#)

ID	Description	Item/Schedule Block	Start Date/Time	Add
3605	Management Fundamentals	COURSE HR-110 (Rev 5/14/2003 12:00 AM America/New York)	7/14/2009 09:00 AM America/New York	<input checked="" type="checkbox"/> 7

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

9 Click Next.

Send Notifications [Help](#)

> Step 1 > Step 2

Step 2: Select Scheduled Offering 9

[Previous](#) [Next](#)

Add a Scheduled Offering to the Criteria

Enter Scheduled Offering ID or add one or more from list.

Scheduled Offering ID: [Add](#)

Update Scheduled Offerings

[Apply Changes](#) [Reset](#)

[Select All / Deselect All](#)

Scheduled Offering ID	Item/Schedule Block	Description	Start Date/Time	End Date/Time	Remove
3605	COURSE HR-110 (Rev 5/14/2003 12:00 AM America/New York)	Management Fundamentals	7/14/2009 09:00 AM America/New York	7/14/2009 05:00 PM America/New York	<input type="checkbox"/>

[Apply Changes](#) [Reset](#)

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.

Send Notifications [Help](#)

> Step 1 > Step 2 > Step 3

Step 3: Refine Population 11

[Previous](#) [Next](#)

This step further refines the population according to the Registration Status and/or Completion Status. Selecting a None for enrollment or completion status returns all users who do not have an enrollment or completion status.

Registration Status: All
CANCELLED
10 ENROLL
PENDING
WAITLIST

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**  to select an email template.

16 Select a Reply To and From email address.

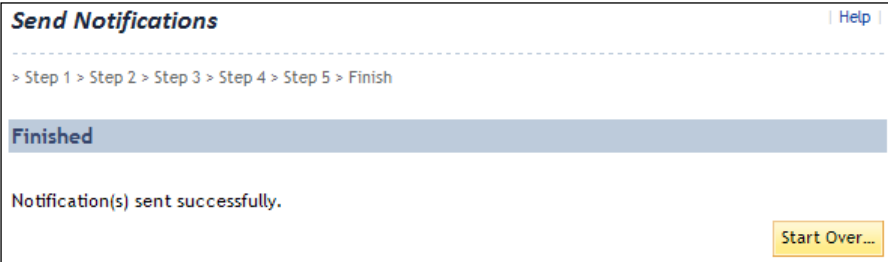
17 Contents of the message can be customized by making any necessary edits to the subject and body of the message as well as adding an attachment.

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.

The screenshot shows the 'Required Dates Editor' interface. The left sidebar contains a navigation menu with categories like 'Items', 'Tools', 'Resources', and 'References'. The 'Tools' section is expanded, and 'Required Dates Editor' is highlighted. The main content area shows the 'Step 1: Add Users' wizard. It includes a 'Next' button, a red asterisk indicating required fields, and an 'Add Users' section. The 'Add Users' section has a text input for 'User ID' (labeled 2) and a link 'add one or more from list' (labeled 4). Below the input is an 'Add' button (labeled 3). At the bottom, there is a message: 'There are no Users in the list. Please add User before proceeding.'

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.

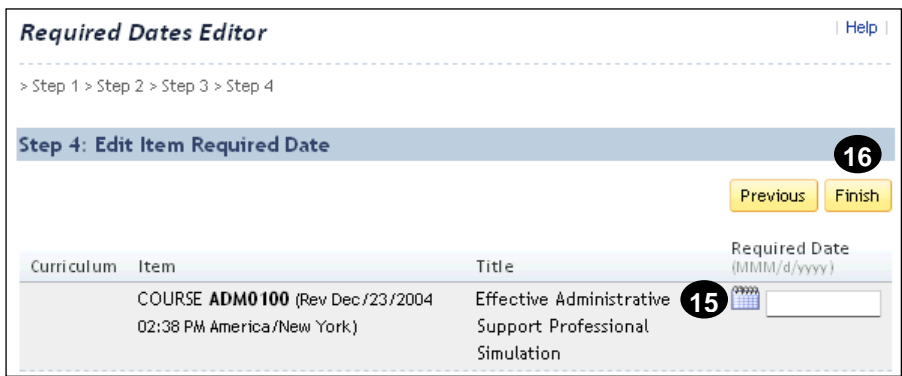
Item	Title	Remove
COURSE ADM0100 (Rev - Dec/23/2004 02:38 PM America/New York)	Effective Administrative Support Professional Simulation	<input type="checkbox"/>

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.




Required Dates Editor | Help

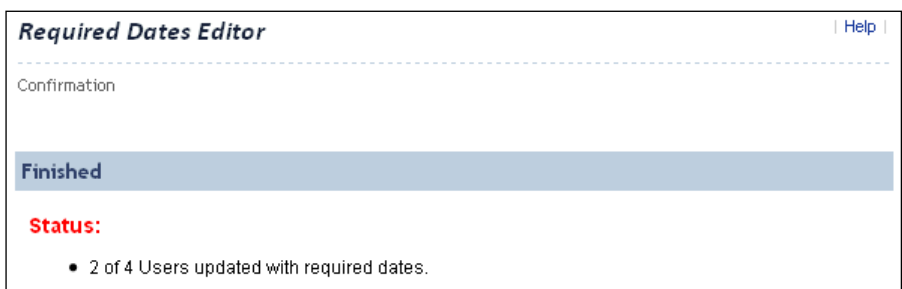
> Step 1 > Step 2 > Step 3 > Step 4

Step 4: Edit Item Required Date **16**

Previous Finish

Curriculum	Item	Title	Required Date (MMM/d/yyyy)
	COURSE ADM0100 (Rev Dec/23/2004 02:38 PM America/New York)	Effective Administrative Support Professional Simulation	15  <input type="text"/>

The users' learning plans were successfully updated.



Required Dates Editor | Help

Confirmation

Finished

Status:

- 2 of 4 Users updated with required dates.

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