Revised January 23, 2011

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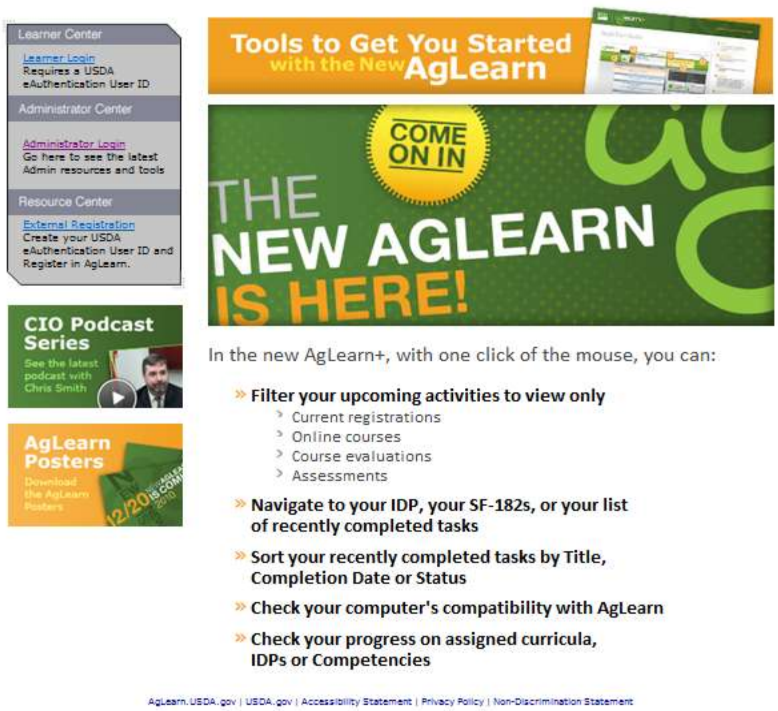
The Administration Environment

Notes:

The Administration environment of AgLearn provides administrators with the ability to track the range of information needed to manage USDA learning programs effectively. This section provides an overview of the Administration environment, examples of common screen types, and job aids for referencing menu options and universal controls (i.e., common buttons, links, and icons) descriptions.

Go to **http://www.aglearn.usda.gov** and follow these steps to login as an Administrator to AgLearn:

- On the Learner Welcome page, click **Administrator Login** to reach the Administrator Welcome Page.
- On the Administrator Welcome Page, click **Administrator Login**.
- Click **Continue** to accept the security admonition.
- Enter your e-Authentication credentials.



Notes:

Note: Your view of the Administrator Home Page will depend on the specific role you've been assigned.

Administrator's Home Page

The **Administrator's Home Page** is the first screen that displays after logging in to the Administration environment of AgLearn. There are eight different views in the Administration environment:

- Home Page
- User Management
- Performance
- Learning
- Commerce
- Content
- Reports
- System Admin

The menu displays and options are restricted according to the permissions directly associated with AgLearn administration role of the person logged in. Areas in which an administrator does not have permission to work will not display.

Notes:

Administration Environment Interface

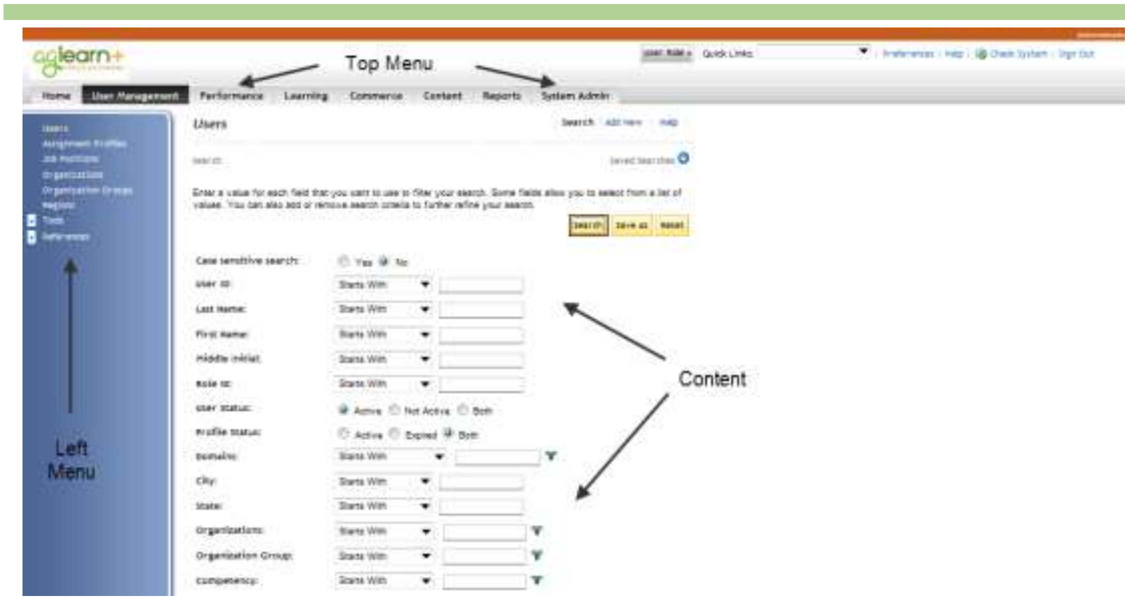
The interface for the Administration environment of AgLearn is comprised of three frames:

- Top Menu
- Left Menu
- Content

The **Top Menu** frame contains three buttons (universal controls) in the upper right corner and nine menu options spanning across the frame. Privileges assigned to each role determine which menu options are visible and accessible to the person logged in to AgLearn.

As **Top Menu** frame options are selected, corresponding sub-menu options are displayed in the **Left Menu** frame.

Note: See the **Menu Options** and **Menu Descriptions** tables for detailed information pertaining to the **Top Menu** frame. Also see the **Universal Controls** table for detailed information pertaining to buttons, fields, links, and tabs available throughout AgLearn.



Notes:

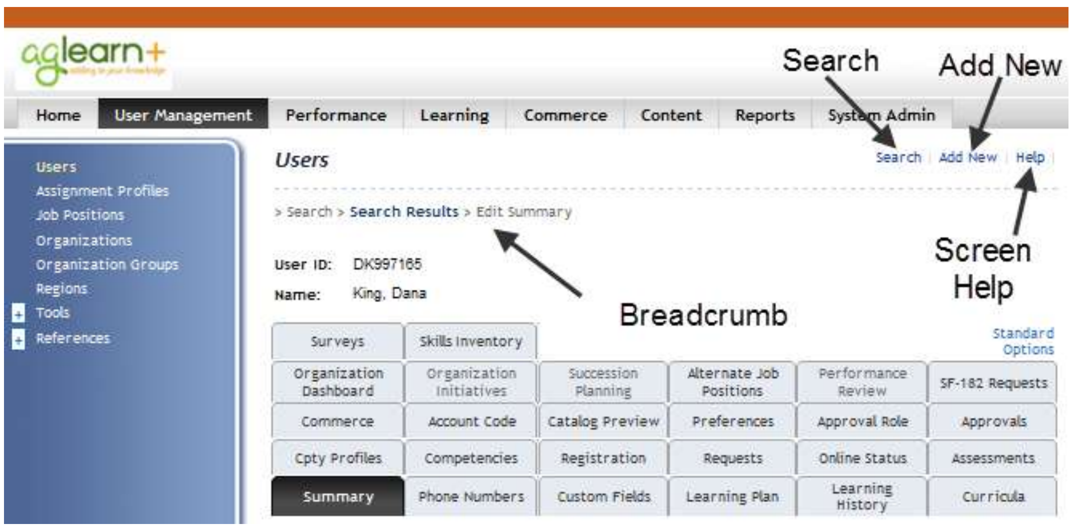
Administration Environment Interface, continued

The **Content** frame is the "working area," where searches are conducted and data/information is edited and viewed. There are several features which appear on the majority of screens in the **Content** frame:

- A "breadcrumb," or path, appears in the upper left corner of each **Content** frame and identifies a person's current location within AgLearn. (In this example, the "breadcrumb" indicates the person is at the **> Edit Summary** screen.)
- The context-sensitive **Help** link is located in the upper right corner of the **Content** frame and provides access to context-sensitive help.
- **Simple** and **Advanced Search** links are located in the upper right corner of the **Content** frame and provide the ability to conduct simple and advanced context-sensitive searches.

Universal controls appear throughout AgLearn and provide the functionality for managing information.

Note: See the **Universal Controls** table at the end of this section for detailed information pertaining to them.



Notes:

Screen Types

There are several types of screens comprising the **Content** frame. Below is a partial list of common screens types appearing throughout AgLearn:

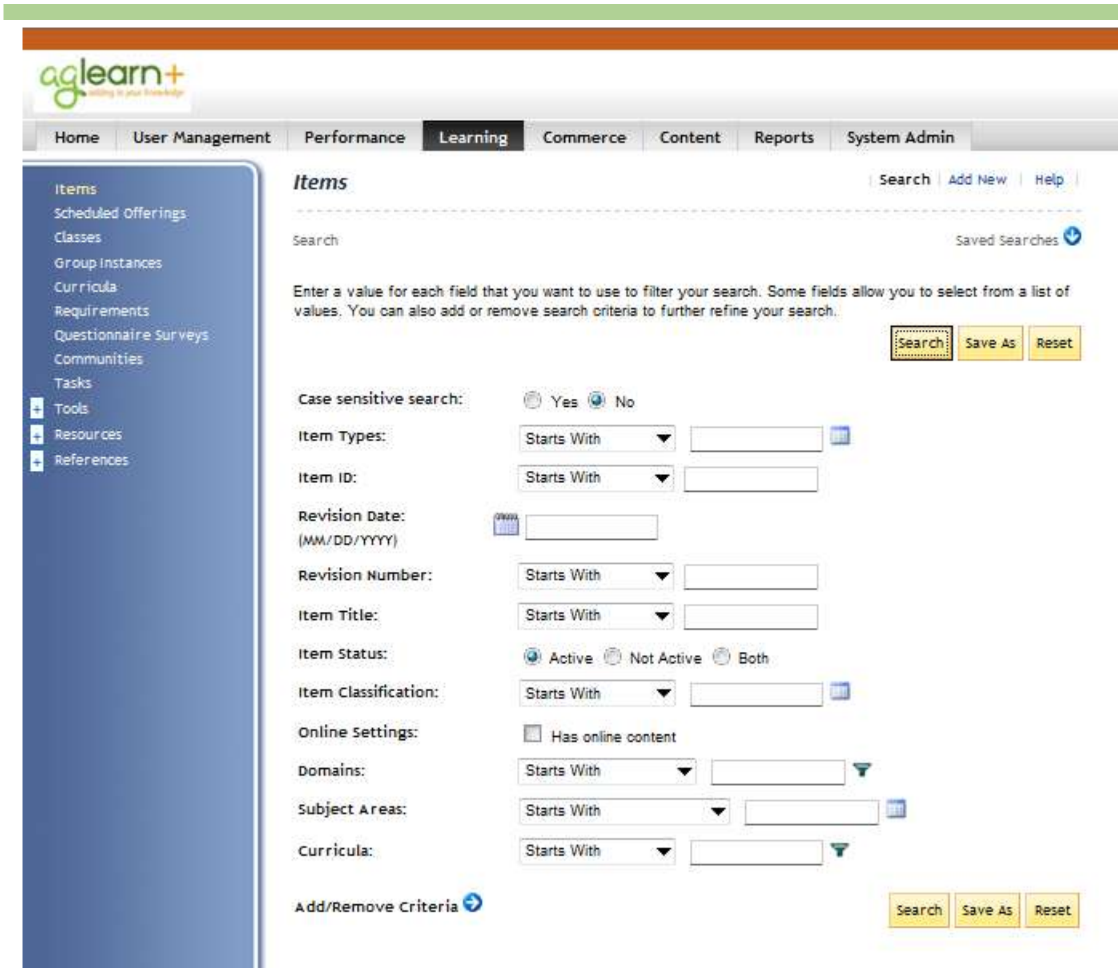
Search
Results Tab
Screens with Tabs
Screens with Sections
Reports
Assistants

Notes:

Screen Types/Search

The **Search** screen is typically the default screen appearing when an option from the **Top Menu** frame is selected. This screen provides the ability to define criteria for narrowing a search.

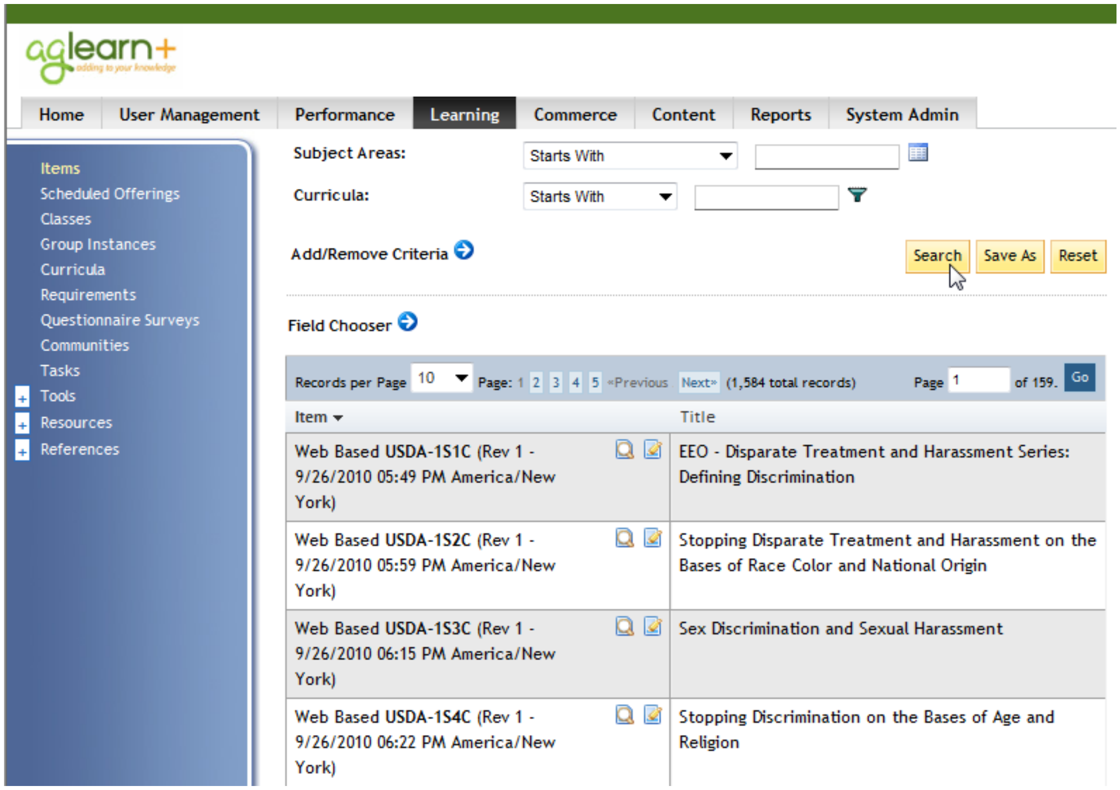
Note: See the **Universal Controls** table at the end of this section for detailed information pertaining to each control.



Notes:

Screen Types/Results

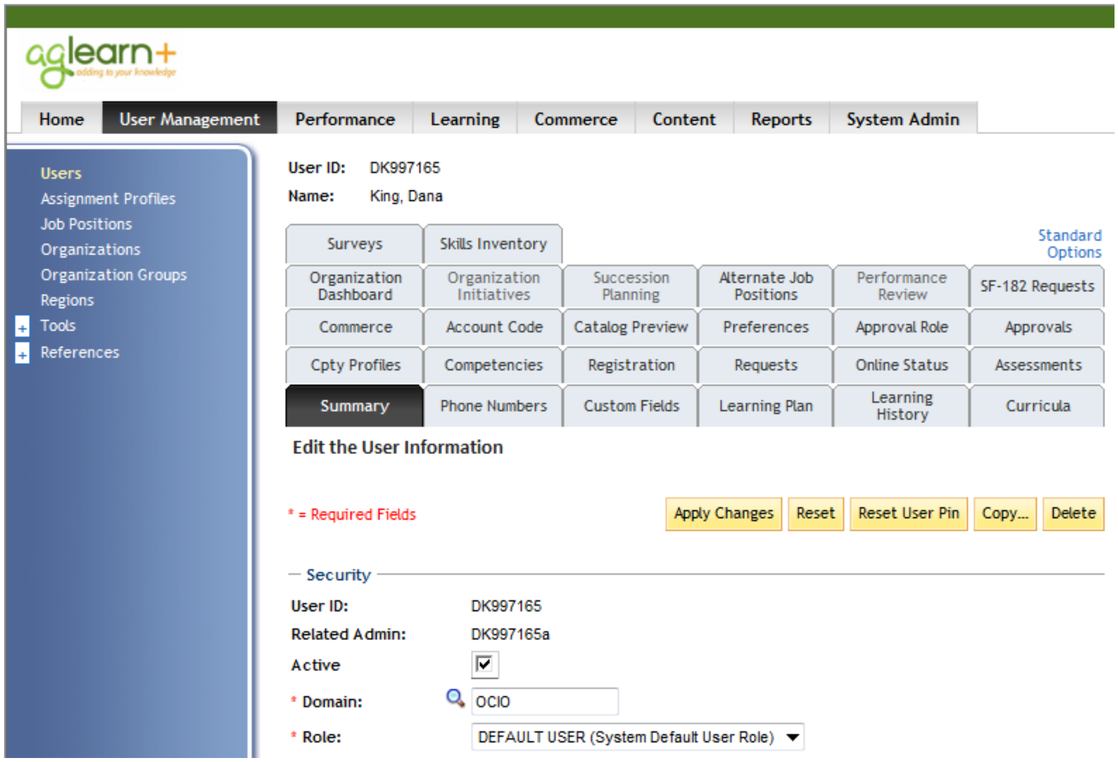
When criteria are entered on a **Search** screen and the **Search** button is clicked, the **Results** display at the bottom of the **Search** screen. Clicking the appropriate icon next to a result allows the administrator to view or edit that result based upon the permissions/role of the person logged into AgLearn.



Notes:

Screen Types/Tabs

Screens containing a great deal of data use tabs to present the information in a categorized fashion rather than displaying all of the information on one very long screen. The currently selected, or **active** tab, appears in dark blue. Clicking a tab provides the opportunity to view/edit the information on that tab. If edits are made to information on a tab, **Apply Changes** must be clicked prior to clicking a different tab (or information will be lost).

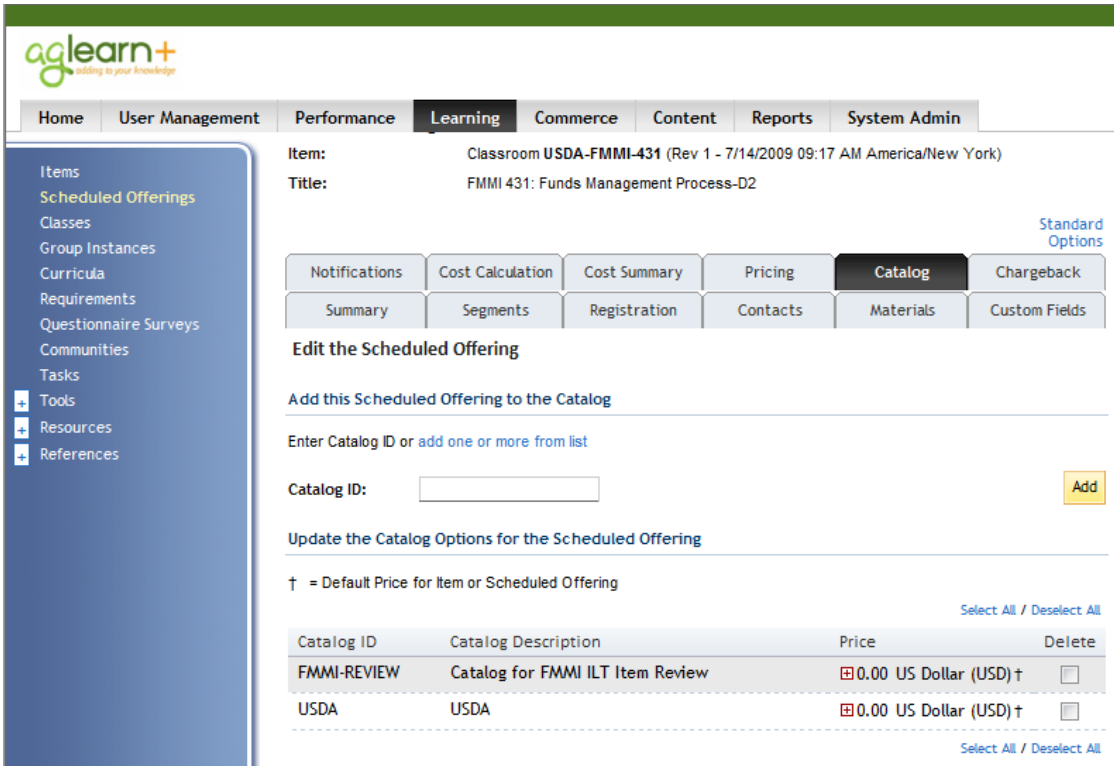


Notes:

Screen Types/Screens with Sections

Many screens are divided into different sections to group similar information or provide the ability to perform several tasks on one screen. Sections are separated from one another by section headers.

This screen illustrates two different sections – the Add this Scheduled Offering to the Catalog section and the Update the Catalog Prices for the Scheduled Offering section.

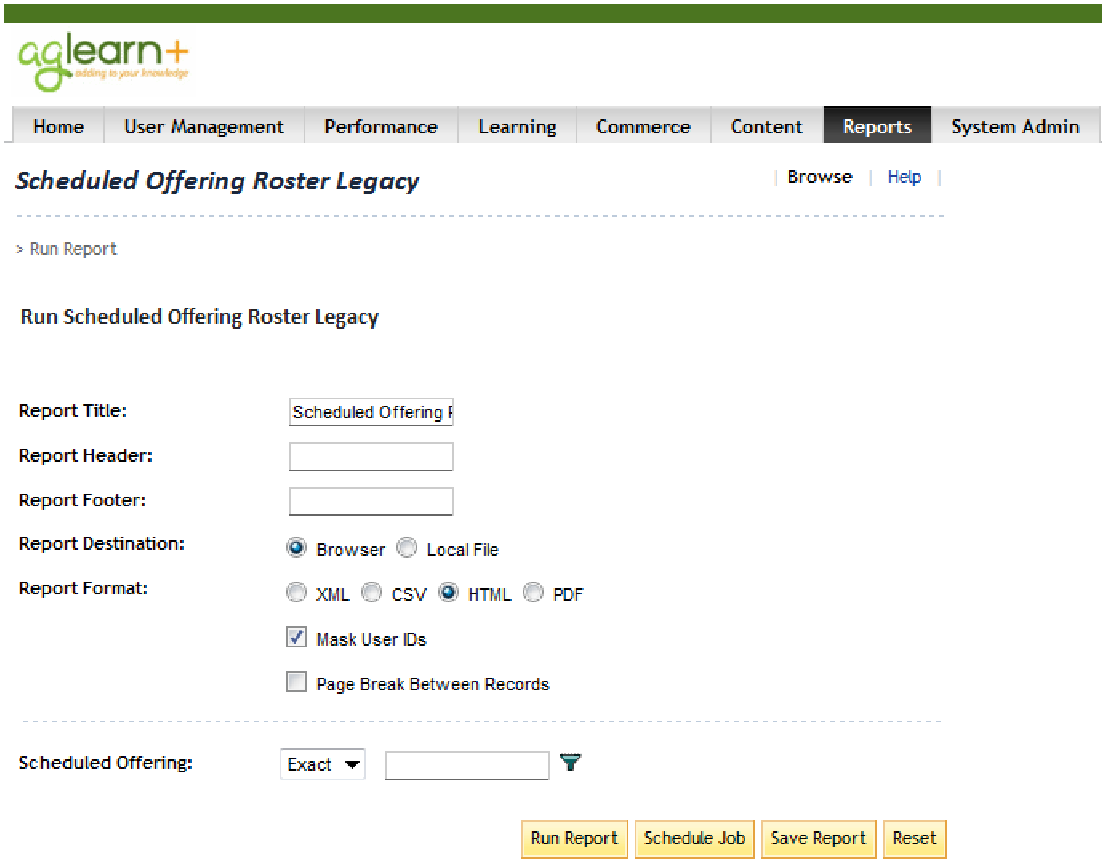


Notes:

Screen Types/Reports

Reports are used to display and print AgLearn data. AgLearn report screens provide the ability to run a report immediately upon identifying the appropriate criteria, or to schedule the report to run at a later time.

Note: See the **Menu Options** table to view a complete list of reports available in AgLearn.



Notes:

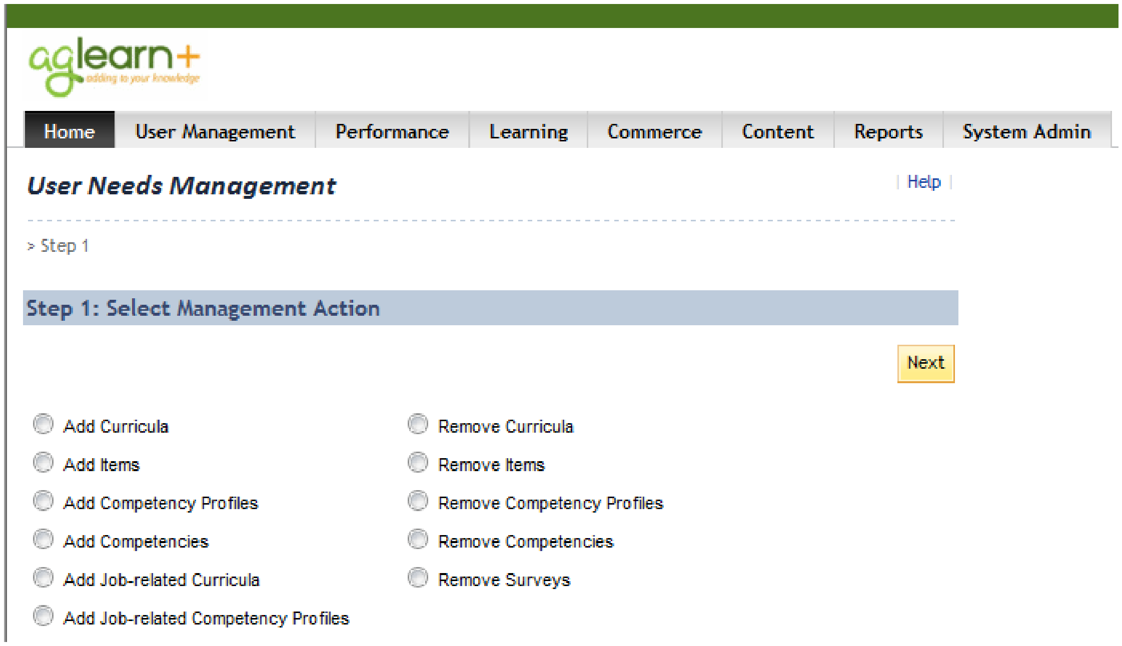
Screen Types/Assistants

Assistants are time saving “wizards,” used to perform certain tasks in a sequential, step-by-step, fashion. When working with an assistant, provide the information requested on a screen, then click **Next** to proceed to the following screen in the sequence (or the next step).

Note: See the **Menu Options** table to view a partial list of assistants available in AgLearn.

Notes:

Screen Types/Assistants



Menu Tab Descriptions

The table below lists the eight “tab” or menu options, with their corresponding descriptions, available to the AgLearn administrator.

Menu Option	Example	Description
Home	Home	The **Home** tab is a Welcome Page, with links to the most commonly performed tasks for your assigned role and a link to the Plateau Help System.
User Management	User Management	The **User Management** menu option provides access to those system functions used to manage general User information, User competency assessments, and User learning events.
Performance	Performance	The **Performance** menu option allows the administrator to manage competencies, performance evaluations, and succession planning.
Learning	Learning	The **Learning** menu option provides access to those system functions used to manage competencies, learning items (including online items), content objects, exam and survey objects, objectives, competency profiles, curricula, and questions.
Commerce	Commerce	The **Commerce** menu option provides access to those system functions used to track and update commercial transactions of Users and/or organizations defined in AgLearn.
Content	Content	The **Content** menu option provides access to those system functions used to manage online content, such as content objects (courseware), surveys, questions, and exam objects.
Reports	Reports	The **Reports** menu option provides access to those system functions used to generate any available AgLearn reports.
System Admin	System Admin	The **System Admin** menu option provides access to those system functions used to manage AgLearn application variables and settings, security and data domain privileges, custom columns, default notification messages, custom reports, and administrator information.

Menu Options

The table below lists the seven menu options, with their corresponding sub-menu options, available to the AgLearn administrator.

User Management	Performance	Learning	Commerce	Content	Reports	System Admin
Users	Competencies	Items	Catalogs	Content Objects	User Management	+ Application Admin
Assignment Profiles	Competency Profiles	Scheduled Offerings	Master Inventory	Content Packages	Performance	+ Security
Job Positions	Succession Planning	Classes	Account codes	Questions	Learning	+ Automatic Processes
Organizations	Skill Search	Group Instances	Order Management	Exam Objects	Content	+ Configuration
Regions	+ Tools	Curricula	Unused order Tickets	Objectives	System Admin	+ Custom Columns
+ Tools	+ References	Requirements	Financial Transaction Approval	Documents	Miscellaneous	+ Tools
+ References		Communities	+ Tools	+ Tools		+ References
		Tasks	+ References			
		+ Tools				
		+ Resources				
		+ References				

Universal Controls

The table below lists common examples of universal controls, with their corresponding descriptions, available throughout AgLearn.

Menu Option	Example	Description
User/Admin Toggle	User Role > Administrator Role >	The **User/Admin Toggle** button allows the administrator to toggle back and forth between the user and administrator interface.
Tabs	Cpty Profiles / Competencies / Summary / Phone Numbers	**Tabs** contain information relevant to the selected record. Selecting a tab provides the opportunity to view and edit the information appearing on the tab.
Apply Changes	Apply Changes	The **Apply Changes** button saves changes made to information appearing in the corresponding section of a screen. **Important**: Changes made to **any** record will **not** be saved unless the **Apply Changes** button is clicked **before** moving to another screen.
Reset	Reset	The **Reset** button resets all fields on the corresponding screen to their original values.
Add	Add	The **Add** button creates a new record corresponding to the selected submenu option (e.g., if **Learning/Items** is selected, clicking the **Add** button provides the opportunity to create a new Item record).
View		The **View** button appears on a **Results** screen and displays the corresponding record.
Edit		The **Edit** button appears on a **Results** screen and opens the corresponding record in Edit mode.
Delete	Delete	The **Delete** button appears on a **Summary** tab and deletes the corresponding record. (You will be asked if you are sure before the record is deleted. There is no “Undo” key in AgLearn.)
Records per Page	Records per Page 10	The **Records per Page** field indicates the number of records to be shown on each screen
Search	Search	The **Search** button performs a search based on the criteria selected on the **Search** screen.
Expand Tree		The **Expand Tree Icon** indicates the data displayed is the parent of several other nested components. Click the icon to display the entire hierarchy.
Collapse Tree		The **Collapse Tree Icon** folds all child components under the parent.
Filter		The **Filter** icon opens a separate window to define search parameters.
Expand		The **Expand** icon will open a pop-up window with additional options for the parameter with which it is associated.
More Options		The **More Options** icon will open a pop-up window with additional options for the parameter with which it is associated.
Search		The **Search** icon performs a search based on the criteria selected on the **Search** screen.
Add one or more from list	add one or more from list	The **Add one or more from list** link displays a search screen from which a search is conducted.
Calendar		The **Calendar** icon opens a separate window to select and enter a date in its corresponding field.
Next	Next	The **Next** button displays the next screen in a sequence when using one of the Assistants.
Previous	Previous	The **Previous** button displays the previous screen in a sequence when using one of the Assistants.
Submit	Submit	The **Submit** button submits the information entered on previous screens and completes the process when using an Assistant.

Menu Option	Example	Description
Add New	Add New	The **Add New** link, located in the upper right corner of the **Content** frame, is available from the **Search** screen and provides the ability to add a new record (e.g., to add a new User, click **Add New** on the Users search screen).
Context-Sensitive Help	Help	**Context-Sensitive Help**, which is located in the upper right corner of the **Content** frame, displays in a new window the help screens relevant to the corresponding sub-menu option.
Help	Help	The **Help** button, which is located in the upper right corner of the **Top Menu** frame, opens the entire AgLearn Online Help System.
Home	Home	The **Home** button, which is located in the upper right corner of the **Top Menu** frame, displays the **Administration Main Menu** screen.
Logout	Logout	The **Logout** button, which is located in the upper right corner of the **Top Menu** frame, ends the current AgLearn session.

Managing Data Entry and Searches

A number of search screens in AgLearn make it easy to find data by applying a search filter. Search filters can be created to suit any eventuality by adding or removing search criteria at will. Most administrators will find a regular set of search criteria that meets their most common needs, and will make only occasional changes for special circumstances.

Search-specific tasks include the following: **Personalize a Search**, **Perform a Search**, **Personalize Search Results**, **Save a Search**, **Execute a Saved Search**, **Perform a Select or Add From List Search**, **Select and Enter a Date via the Calendar Icon** and **Perform a Selection via the Selection Icon**.

A Day-in-the-Life Scenario

You need to be able to find all users whose last names begin with the letter "S." You also need to know how many user records have blank email address fields..

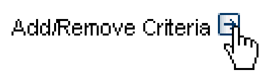
Adding/Removing Search Criteria

The search screen is available on many menus. The User Management menu is being used for illustration purposes.

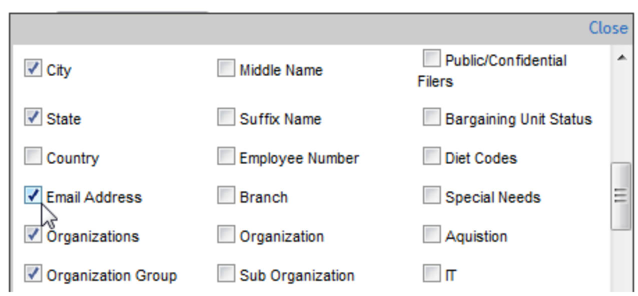
Step | **Activity** | **View**

1. Select the **User Management** menu.

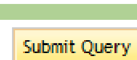
2. Click the **Expand** icon next to **Add/Remove Criteria**



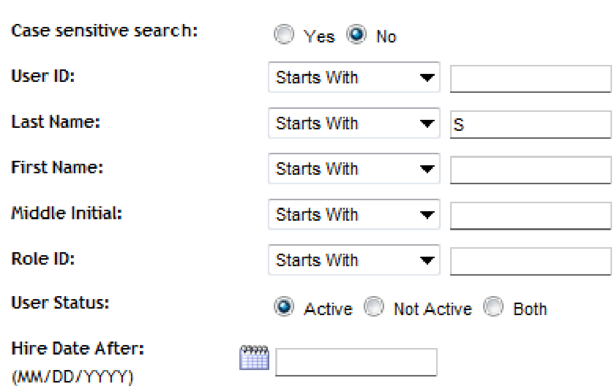
3. Check (or uncheck) the boxes for the criteria you want to use.



4. Click **Submit Query.**



5. The criteria you selected will appear for subsequent searches.



Notes

The **Simple Search** screen opens when some left hand menu items are selected.

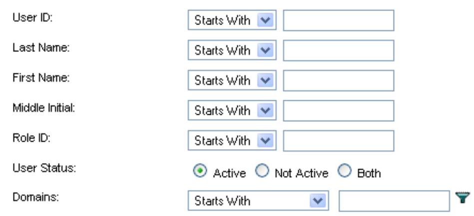
Performing a Search

Step | **Activity** | **View**

1. Select the **User Management** menu.

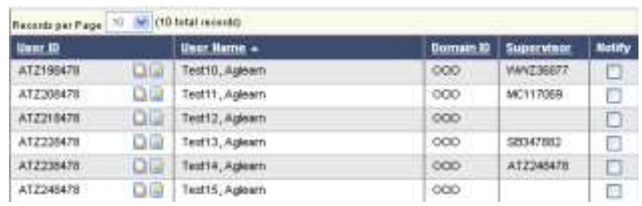
2. Enter and/or select the basic search criteria as appropriate.

Note: The data fields may be left blank to select from an entire list.



3. Click **Search**.

4. Review search results.

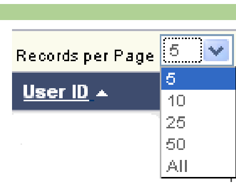


To go to a specific page number, enter the desired number in the Page field and then click **Go**.

5. If necessary, select the **Next Page** link to go to the next page of results.

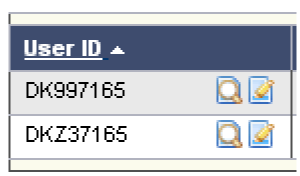
Be careful when selecting **All**, as it may take some time for the screen to display results. You may want to select the new **500** option instead of **All**.

6. Select **All** from the **Records per Page** drop-down list to display every record in the results.



Not all action icons associated with records in a search results screen may be displayed. The displayed actions are determined by the permissions given to the assigned role.

7. Select the **View**, or **Edit**, icon to perform the desired action.

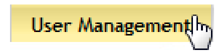
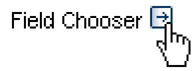
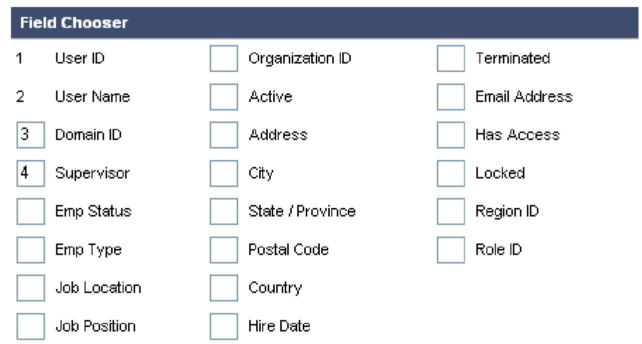


Notes

The search screen is available on many menus. The User Management menu is being used for illustration purposes.

Customizing Search Results

Once search results are displayed, you can add additional fields to be displayed on the search results screen.

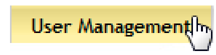
Step	Activity	View
1.	Select the **User Management** menu.	
2.	Click the **Expand** icon next to **Add/Remove Criteria**.	
3.	Add numbers to the checkboxes to identify the criteria and the order of the fields you would like to see displayed for your subsequent search results.	
4.	Click **Submit** to see the search results with the additional fields.	

The search screen is available on many menus. The User Management menu is being used for illustration purposes.

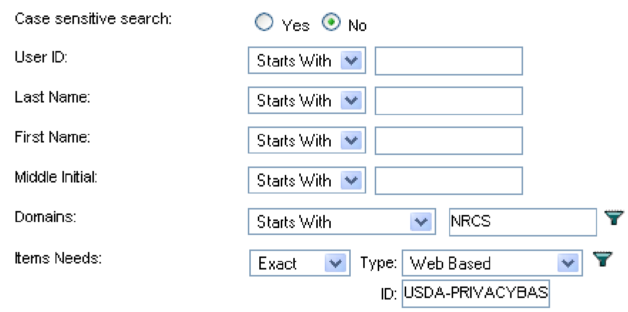
Saving a Search

Step	Activity	View

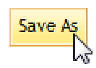
1. Select the **User Management** menu.



2. Fill in your search parameters.



3. Click **Save As**.

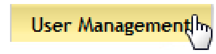
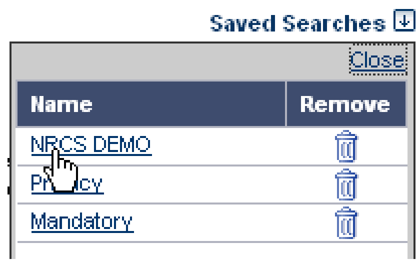
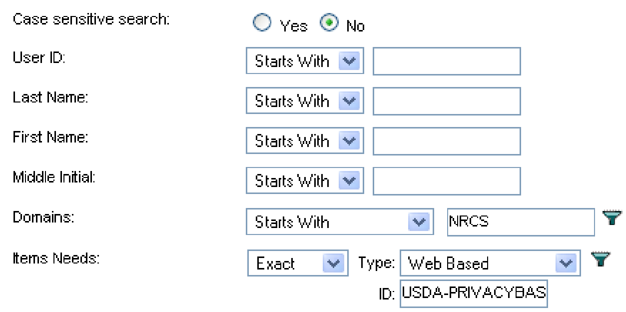
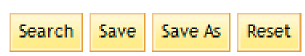


4. Enter a **Saved Search ID** and description.

5. Click **Submit**.

The search screen is available on many menus. The User Management menu is being used for illustration purposes.

Executing a Saved Search

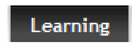
Step	Activity	View
1.	Select the **User Management** menu.	
2.	Click the **More Options** icon next to **Saved Searches**.	
3.	Select the saved Search you want to open.	
4.	The **Search** form appears, with the saved parameters already filled in. Edit as needed. **Note:** Clicking **Reset** at this point will not clear all fields, but will return the fields to the saved search pre-set values.	
5.	If you want to save any edits for future searches, click **Save**, or click **Save As** to save them under a different name.	
6.	Click **Search**.	

Performing a Select from List Search

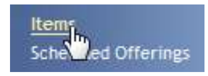
Notes

Step | **Activity** | **View**

1. Select the **Learning** menu.

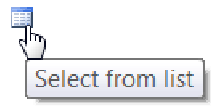


2. Select **Items**.



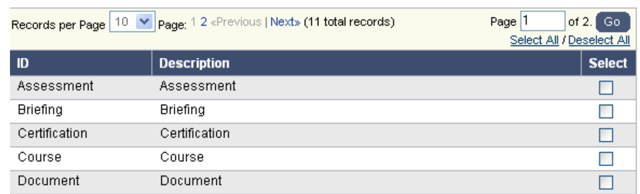
The **List** link enables you to add criteria to the search filter.

3. Select the **Select from List** icon, or search for the **Item Type**.

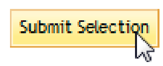


The **select from list** link allows the user to select more than one result. The **selection** icon presents a list from which only one result may be selected.

4. Select the **Select** or **Add** check box next to the record(s) requested.



5. Click **Submit Selection**.



At this point you can remove filter records if you wish by selecting the **Remove** check box.

6. Verify the selection and click **Submit Filter**.

Notes

The Calendar icon is available on many screens. The Scheduled Offerings screen is being used for illustration purposes.

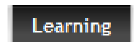
Using the **Calendar** icon prevents date formatting errors.

You can also click on the **>** and **>>** symbols to change the month and year.

Selecting and Entering a Date via the Calendar Icon

Step | **Activity** | **View**

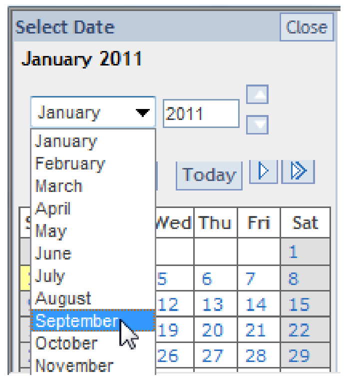
1. Select the **Learning** menu.



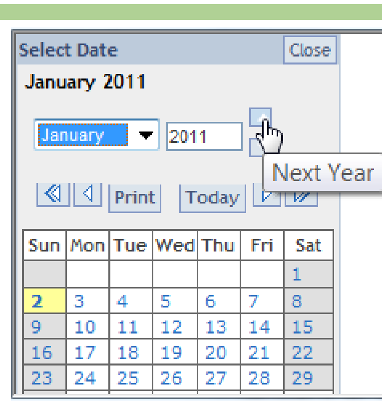
2. Select **Scheduled Offerings**.

3. Click the **Calendar** icon next to the desired field.

4. Select the month from the drop-down list.

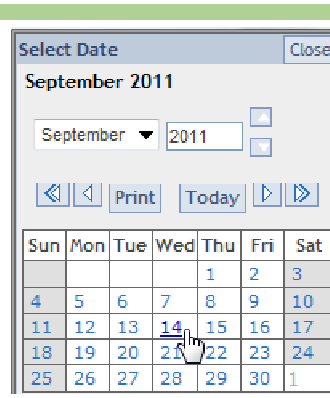


5. Click the increase or decrease buttons to change the year's display forward or backward.

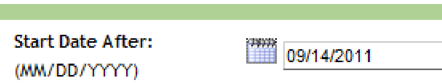


6. Select the desired date to enter the date and close the **Select Date** window.

Tip: Select the **Today** link to set the date to the current day.



7. Verify that the selected date appears in the **Date** field.



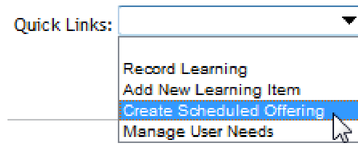
Notes

Performing a Selection When Only One Option May be Chosen

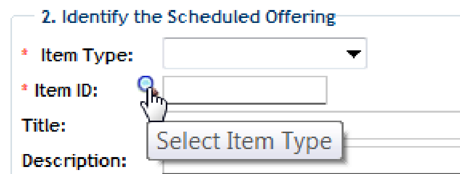
Step | **Activity** | **View**

1. From the Quick Links drop down list, select **Create Scheduled Offering**.

The Selection icon is available on many screens. The Add New Learning Item screen is being used for illustration purposes.

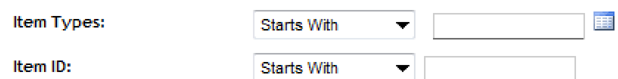


2. Click the **Item ID** search icon to open an Item search window.



3. Enter or select the search criteria as appropriate.

Leave any search fields blank to select from the entire list.



4. Click **Search**.

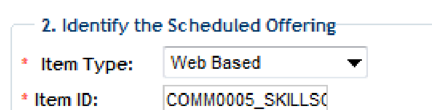
5. Review search results.

Click **Next** to move to additional pages of results or select **All** from the Results per Page drop down list to display all the results on the screen.

6. Select the **Select** link of the record to be used for data entry.

When the link is selected, the results window closes and the data is automatically entered into the field.

7. Verify that the selected data has been placed in the field.



Managing Users

Most of the personal User data in AgLearn is automatically populated through regular data feeds (Domain, address, Job Position, Pay Grade, etc.) or is entered manually by the Users themselves (supervisor, e-mail address, phone numbers). There are some personnel-related functions that Users cannot take care of, as they are associated with multiple accounts, or are designed to provide information to, or take action on behalf of, the User.

The **Merge Users** functionality is useful when multiple accounts have been created for the same User. **Supervisor Assistant** allows the administrator to quickly update AgLearn when a supervisor change is made, instead of waiting for all of the affected Users to do it individually.

Administrators can add or remove training directly from the User’s To-Do Lists, as well as modify the ‘Required By’ dates for training that has already been assigned.

Ad Hoc Notifications allow the administrator to directly communicate via e-mail with a subset of Users that may be created just for that communication. (All those who have not completed a specific Item, for instance.) **Direct Linking** allows a User to go directly to a specified AgLearn page by clicking a URL embedded in an e-mail, possibly one generated by an ad hoc notification.

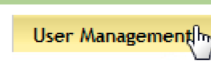
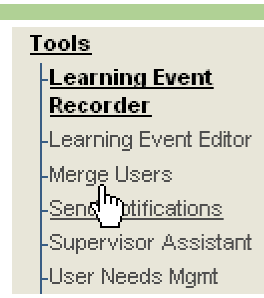
SF-182 forms used as requests for external training can be created, modified, approved, and verified by administrators with the necessary workflows.

Assignment Profiles are powerful compilations of attributes that may be used for catalog access, Item or curriculum assignment, or any function that involves potentially large numbers of Users with specific similarities.

A Day-in-the-Life Scenario

- Due to well-intentioned, yet misguided, efforts, a User has multiple accounts in AgLearn. Other Users have changed supervisors. These conditions must be corrected, and notifications should be sent informing the affected Users.

Merging Users

Step	Activity	View
6.	Select the **User Management** menu.	
7.	Select **Tools**.	
8.	Select **Merge Users**.	

Merging Users

Step | **Activity** | **View**

9. Use the search page to filter the list of Users. *Be sure that your search criteria will result in both User records appearing.*

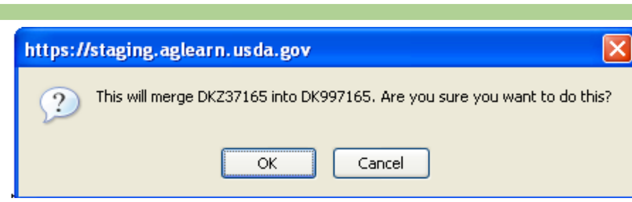
Click **Search**.

10. Find the User whose records you wish to use as the secondary User. Click the corresponding **Merge from User ID** radio button.

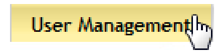
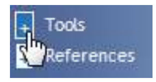
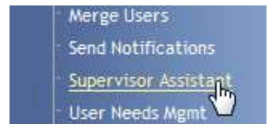
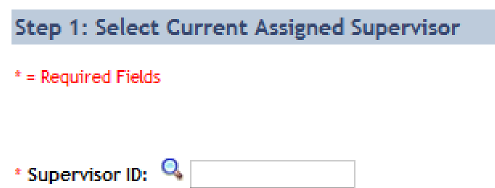
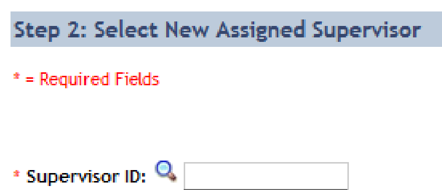
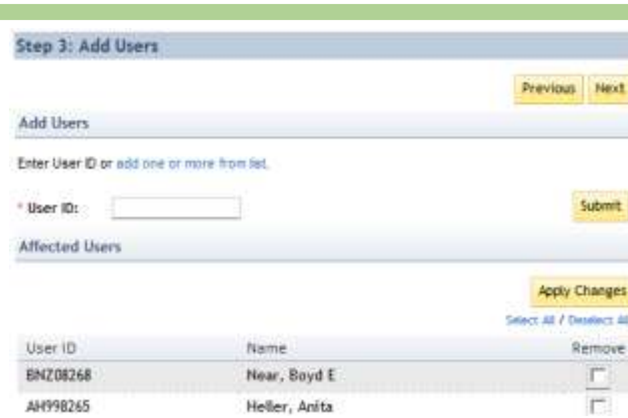
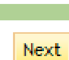
11. Find the primary User into whom you want to merge the records. Click the corresponding **Merge Into User ID** radio button.

12. Click **Merge**.

13. Click **OK**.



Supervisor Assistant

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Select the User Management menu.</td><td>
</td></tr>
<tr><td>2.</td><td>Expand the Tools menu.</td><td>
</td></tr>
<tr><td>3.</td><td>Select Supervisor Assistant.</td><td>
</td></tr>
<tr><td>4.</td><td>In the Supervisor ID text box, type the ID of the current supervisor, or click the Search icon to find and select one.</td><td>
</td></tr>
<tr><td>5.</td><td>Click Next.</td><td>
</td></tr>
<tr><td>6.</td><td>In the Supervisor ID text box, type the ID of the new supervisor, or click the Search icon to find and select one.</td><td>
</td></tr>
<tr><td>7.</td><td>Click Next.</td><td>
</td></tr>
<tr><td>8.</td><td>All Users under the Current Supervisor are displayed. To add a User to the list, type the User ID in the User ID text box, or click the Add one or more from list link to use a search page and select multiple Users.</td><td>
</td></tr>
<tr><td>9.</td><td>When you are satisfied the list is complete, click Next.</td><td>
</td></tr>
</table>

You can also remove Users from the supervisor's list by clicking **Remove** on the appropriate line(s).

Supervisor Assistant

Step	Activity	View
10.	Review the information. The User records displayed should reflect the new supervisor. If satisfied, click **Finish**. If not satisfied, click **Previous** to return to Step 8.	

Notes

Assigning an Item to a User's To-Do List can also be accomplished by using the User Needs Management Assistant. See **Adding Items to User Record(s) with the UNM Assistant** for detailed information.

If the Learner is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

The tabs displayed after clicking edit depends on your assigned role.

Assign an Item to a To-Do List Record

Step | Activity | View

1. Select the **User Management** menu.

2. Select **Users**.

3. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.

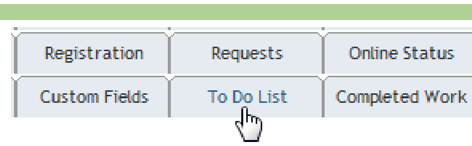
4. Click **Search**.

5. Locate the desired User record.

Tip: Use the **Ctrl+F** function to quickly find a User record on the screen.

6. Select the User's corresponding **Edit** link.

7. If it is not already displayed, select the **To-Do List** tab.



8. In the **Assign User Needs** section, select the **Add one or more from list** link.

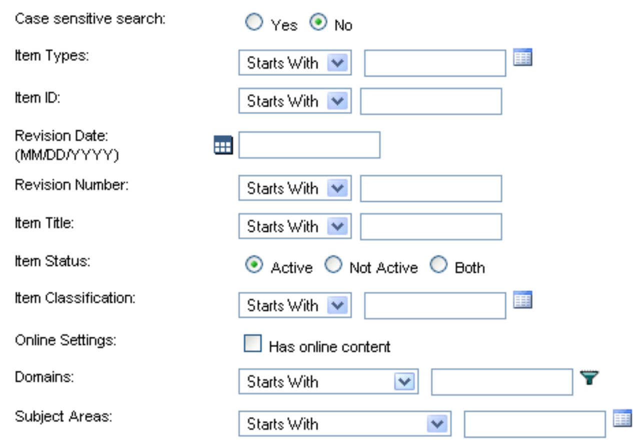
Notes

Assign an Item to a To-Do List Record

Step **Activity** **View**

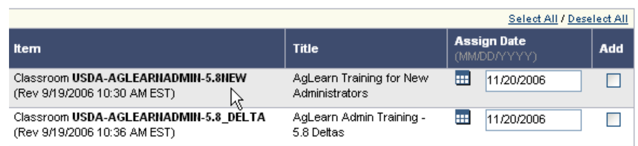
9. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



10. Click **Search**.

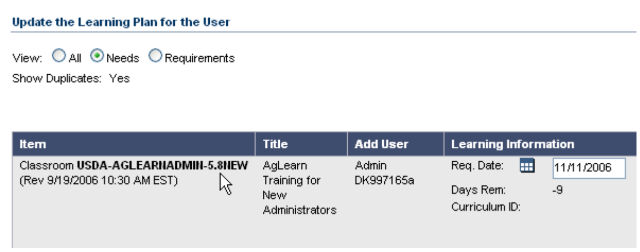
11. On the **Results** tab, locate the Item to be added to the To-Do List.



12. If the assign date is not the current (default) date, select the **Assign Date** calendar icon to select and enter the actual assign date.

13. Click **Add** to add the Item and return to the To-Do List tab.

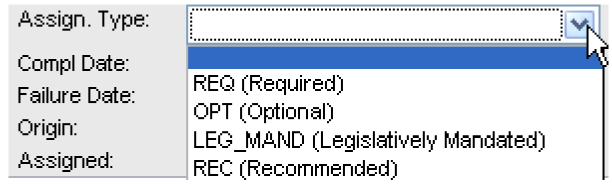
14. In the **Update the Learning Plan for the User** section, locate the Item recently added.



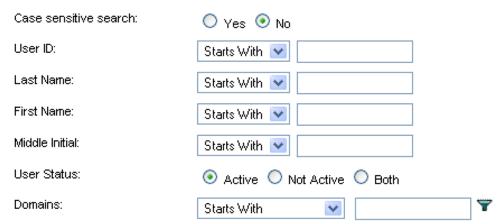
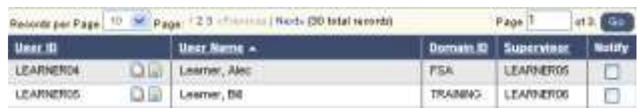
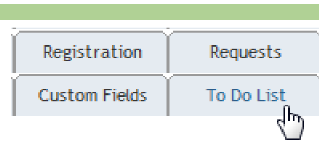
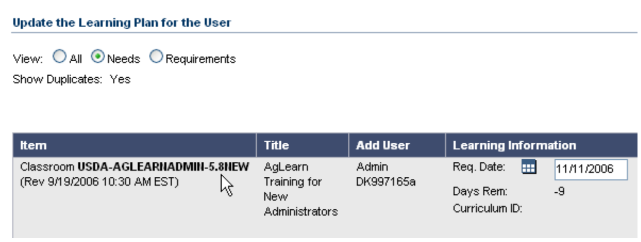
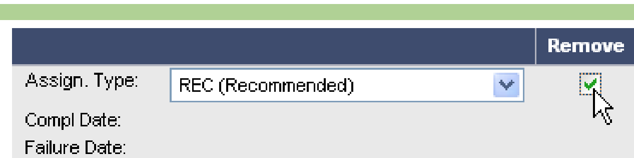
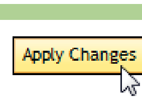
15. Select the corresponding **Req. Date** calendar icon to enter the date by which the User must complete the Item.

Notes

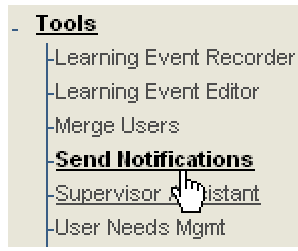
Assign an Item to a To-Do List Record

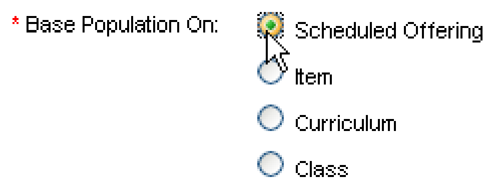
<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>16.</td><td>Select the corresponding assignment type from the Assign. Type drop-down list.</td><td>
</td></tr>
<tr><td>17.</td><td>Click Apply Changes.
Caution: Do not select a different tab prior to clicking Apply Changes or all changes and modifications will be lost.</td><td>
</td></tr>
</table>

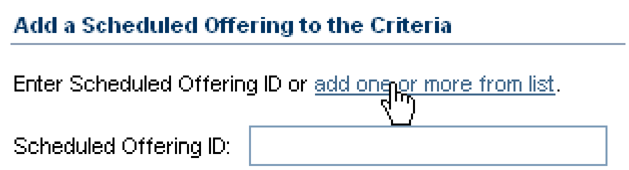
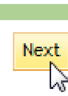
Remove an Item from a To-Do List Record

Notes	Step	Activity	View
Removing an Item from a User's To-Do List can also be accomplished by using the User Needs Management Assistant. See **Removing Items from User Record(s) with the UNM Assistant** for detailed information.	**1.**	Select the **User Management** menu.	
	2.	Select **Users**.	
	3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	4.	Click **Search**.	
Use the Ctrl+F function to quickly find a User record on the screen.	**5.**	On the **Results** tab, locate the desired User record.	
	6.	Select the corresponding **Edit** icon.	
	7.	Select the **To-Do List** tab.	
	8.	In the **Update the Learning Plan for the User** section, locate the Item to be unassigned.	
	9.	Select the **Remove** check box to mark the Item for removal from the Learning Plan (To-Do List).	
Caution: Do not select a different tab prior to clicking Apply Changes or all changes and modifications will be lost.	**10.**	Click **Apply Changes**.	

Ad Hoc Notifications

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Select the User Management menu.</td><td>
</td></tr>
<tr><td>2.</td><td>Select Tools.</td><td>
</td></tr>
<tr><td>3.</td><td>Select Send Notifications.</td><td>
</td></tr>
<tr><td>4.</td><td>Select the criterion on which your recipients will be selected.

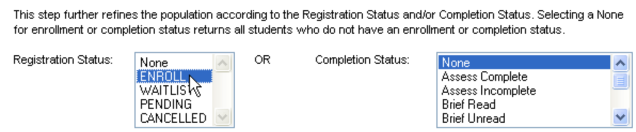
For the purposes of demonstration, this example will use the screens that flow from selecting Scheduled Offering. The others are similar.</td><td>
</td></tr>
<tr><td>5.</td><td>Click Next.</td><td>
</td></tr>
<tr><td>6.</td><td>If you know the scheduled offering ID number, enter it in the Scheduled Offering ID box, and click the Add button.

If you don’t know the scheduled offering ID, search for it by clicking the Add one or more from list link.</td><td>
</td></tr>
<tr><td>7.</td><td>Multiple offerings may be added. When you have all the offerings you want, click Next.</td><td>
</td></tr>
</table>

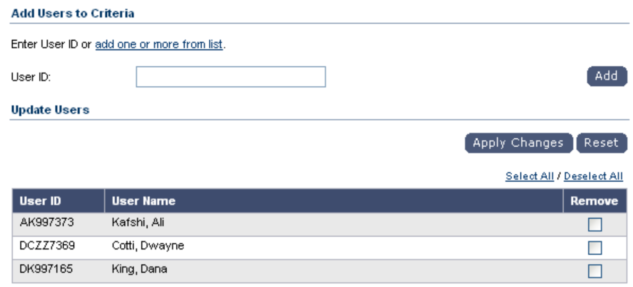
Ad Hoc Notifications

Step	Activity	View

8. Select a **Registration Status** or a **Completion Status** for the Users you want to notify.



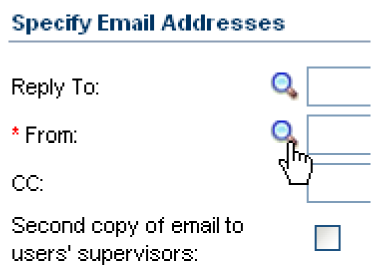
9. Add or remove Users as necessary to compile the precise list to receive the notification.



10. Click **Next**.

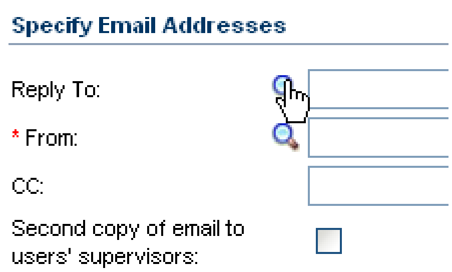
11. Search for an e-mail template you'd like to use by clicking the **Search** icon next to **Email Template**.

12. The **From** field defaults to your e-mail address if it is recorded in AgLearn. You may change this by typing in another address, or by searching for another address by clicking the **Search** icon.



13. Enter the e-mail address to which any replies should be directed in the **Reply To** field. The e-mail address you enter in the **From** box in Step 3 will appear here by default, if it is recorded in AgLearn.

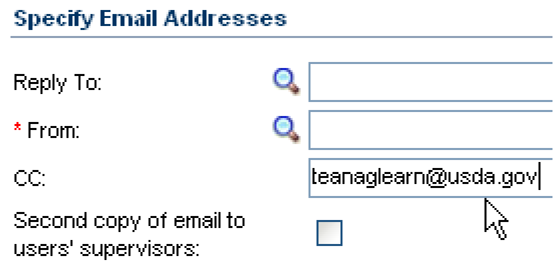
If you wish to use a different address, type it into the **Reply To** box manually, or search by clicking the **Search** icon.



Ad Hoc Notifications

Step **Activity** **View**

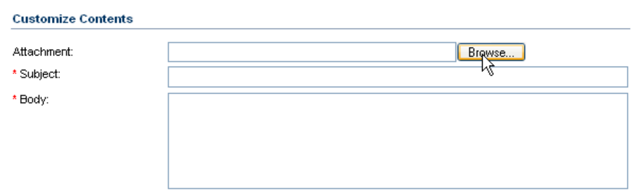
14. Type in the addresses of any others who should receive this e-mail in the **CC** field. The addresses must be typed out in full and separated by commas.



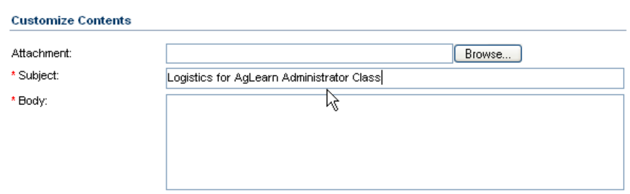
The supervisor will receive an email for every subordinate who receives a notification.

15. Check the **Second copy of email to users' supervisors** box if you would like the e-mail to also be sent to the supervisor of each User listed.

16. One file may be attached to the notification. Click the **Browse** button to search for the file name and location.



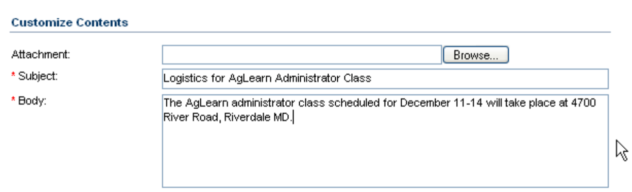
17. Type a subject or title for the notification in the **Subject** box.



18. The **Body** block will be automatically filled in if you selected an e-mail template in Step 1. You may edit it to include the text you wish.

If no template is chosen, type in the message you want to deliver and it will appear in plain text, with no formatting.

A Direct Link may be included in the body of an ad hoc notification.



Ad Hoc Notifications

Step	Activity	View
19.	Click **Send Notification**.	
20.	The **Finished** page confirms that the notification message has been sent to the e-mail server. Click the **Start Over** button to re-start the wizard for another notification.	

Direct Linking

AgLearn has the capability of providing HTML hyperlinks to specific pages in AgLearn so Users can directly access the pages. These links can be embedded in any environment that can accept HTML URLs, including e-mail notifications, Web pages, and documents. The User is taken directly to the appropriate page when the link is clicked, after providing login information if he or she is not already logged in.

The use of direct links does not compromise security. Users will have access only to those sections of the application that their assigned workflow restrictions allow.

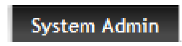
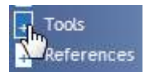
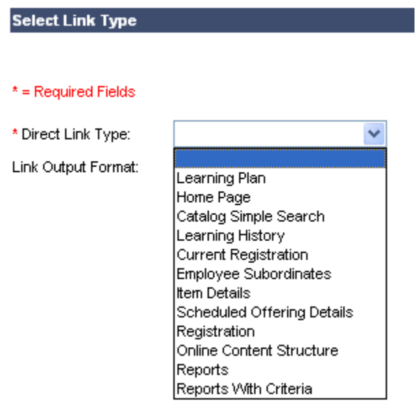
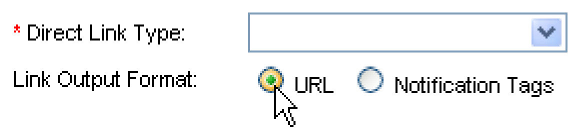
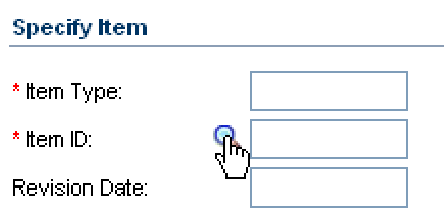
The Direct Linking Wizard is used to create the link after you have chosen the page. You can copy it into an e-mail or automatic notification so that the User can click the link or copy and paste it to reveal the exact page you want them to see.

Direct Links can be created to point Users to any of the following pages in AgLearn:

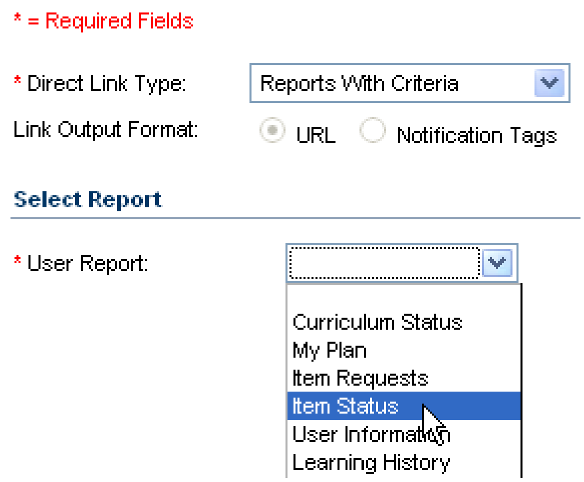
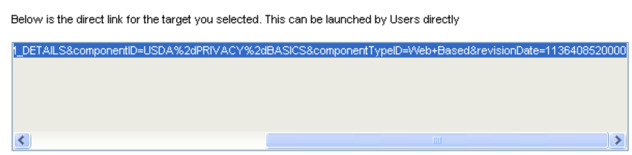
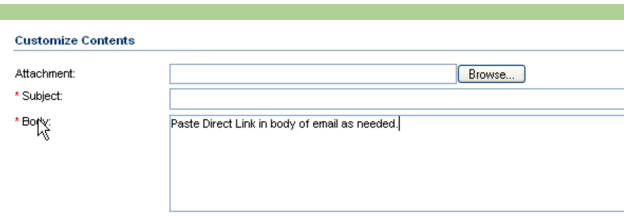
- All AgLearn learning pages – Including To-Do List, Home page, Catalog Simple Search page, Completed Work page, Current Registration page, and the Employee Subordinates page. URL is the only output option available for these pages. You cannot choose to insert the link into notification tags.
- Item Details – The User will be directed to the specified Item's Details page.
- Scheduled Offering Details – The User will be directed to the specified scheduled offering's Details page.
- Registration – Directs the User to the Registration page of the specified scheduled offering.
- Online Content Structure – Directs the User to the Online Content Structure page for the Item specified.
- Report – Creates a link to the specified User Report. (**Note**: Administrator reports are not available.)
- Reports with Criteria - Creates a link to the specified User Report, and allows you to specify the criteria for the report before creating the link.

Once the link has been created, it can be copied and pasted in an e-mail, document, or notification.

Using the Direct Link Wizard to Create a URL Direct Link

Step	Activity	View
1.	Select the **System Admin** menu.	
2.	Expand the **Tools** menu.	
3.	Select **Direct Link**.	
4.	Pull down the menu and select the **Direct Link Type**.	
5.	Choose **URL** as the **Link Output Format**.	
6.	Depending on the link type chosen in Step 4, you may be prompted for additional information. For **Item Details** or **Online Content Structure**, click the **Search** icon next to **Item ID** to search for the Item. The Item Type and Revision Date fields will be filled in automatically.	

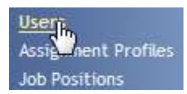
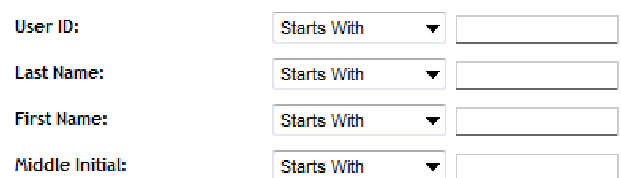
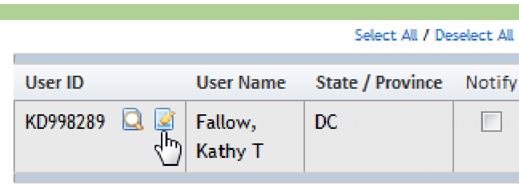
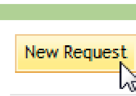
Using the Direct Link Wizard to Create a URL Direct Link

Step	Activity	View
7.	For **Scheduled Offerings** or **Registrations**, click the **Search** icon to search for the **Scheduled Offering ID**. You may also type it in directly, if you know it.	
8.	For **Reports** or **Reports with Criteria**, enter the report you wish to have run. If choosing **Reports with Criteria**, you will have a chance to specify the criteria after you have chosen which report is to be run.	
9.	Click **Display Link**.	
10.	Copy the link.	
11.	The link can now be pasted directly into any e-mail, including those sent as ad hoc notifications.	

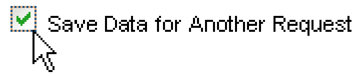
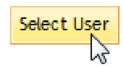
External Training Requests

Administrators are now able to create SF-182 requests on behalf of employees, view and edit requests that are already in the pipeline, and make approvals as necessary. Requests can be submitted as pre-approved, and can be back-dated to accommodate training that has already taken place.

Creating an External Training Request on Form SF-182

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Users** from the left menu.	
3.	Search for the User for whom you wish to create the external request. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Select the **Edit** icon for the appropriate User.	
5.	In the User's record, click the **SF-182 Requests** tab.	
6.	Click the **New Request** button.	
7.	Part of the form will be automatically populated with data from the User's record. Complete as much of the form as necessary.	
8.	To submit the request as already approved and bypass the normal approval process, check **Submit Request as Approved**.	

Creating an External Training Request on Form SF-182

	Step	Activity	View
You must click **Submit** after checking this box for the request to be submitted for this User.	**9.**	To save the non-personal data so it can be used for another User, check **Save Data for Another Request**.	
You must click **Submit** before **Select User** for the request to be submitted for the current User.	**10.**	To choose another User's record to apply the data saved in Step 7, click **Select User**.	
	11.	To submit the completed form for approval, click **Submit**.	
	12.	To clear any changes made to the form, click **Reset**.	

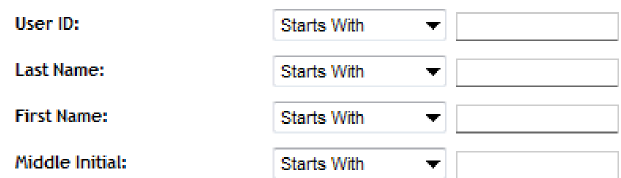
Editing an SF-182 Form

Step | **Activity** | **View**

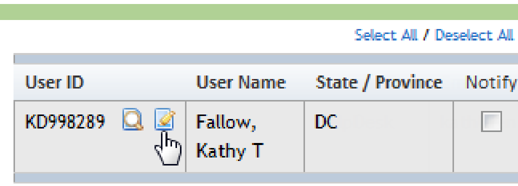
13. Select **User Management** from the top menu.

14. Select **Users** from the left menu.

15. Search for the User for whom you wish to create the external request.

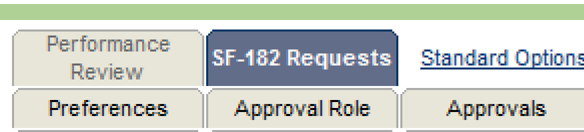


16. Select the **Edit** icon for the appropriate User.



Some administrators may see an **Edit Approved Request** as well here. This is new functionality in version 6.1.

17. In the User's record, click the **SF-182 Requests** tab.

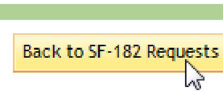


18. Click the **Edit Request** link for the request to be edited.

19. The SF-182 pops up in a new window. Make the necessary changes.

20. Click **Apply Changes** to save the changes.

21. When finished, click the **Back to SF-182 Requests** button.



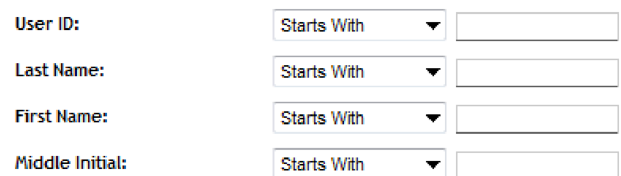
Approving an SF-182 Form

Step | Activity | View

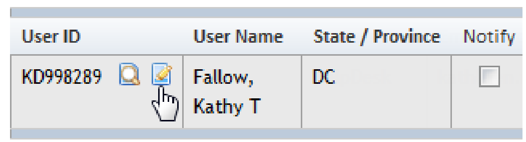
1. Select the **User Management** menu.

2. Select **Users** from the left menu.

3. Search for the User for whom you wish to approve the external request.

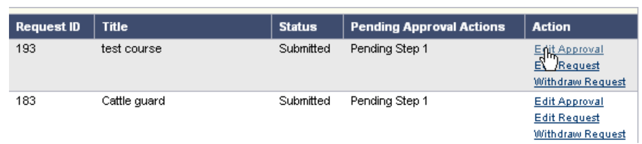


4. Select the **Edit** icon for the appropriate User.



5. In the User's record, click the **SF-182 Requests** tab.

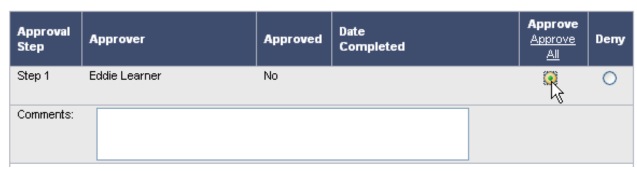
6. Click the **Edit Approval** link for the request to be edited.



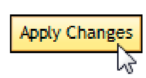
7. Click the option button for **Approve** or **Deny**.

Note: It is useful to include comments as to why you are performing this action and to cite your authorization for doing so.

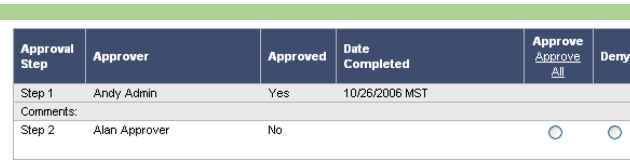
You also have the option to click the **Approve All** link to complete the approval process with one action.



8. Click **Apply Changes**.

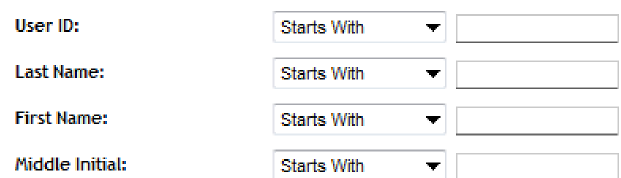
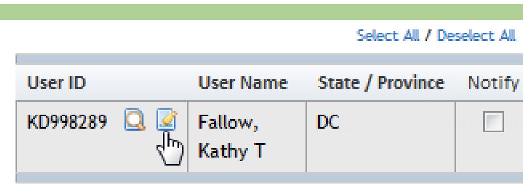
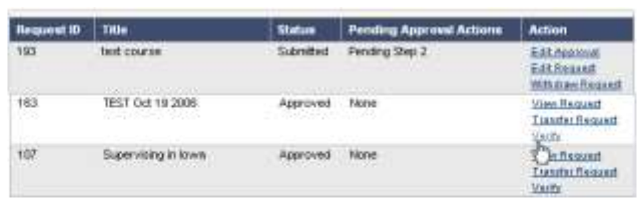


9. The screen will refresh, with the approval or denial noted.



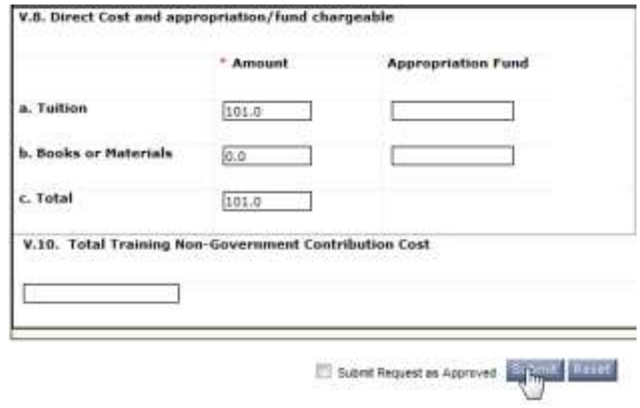
10. Click the **Back** button on the AgLearn screen.

Verifying External Training Requested via Form SF-182

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Users** from the left menu.	
3.	Search for the User for whom you wish to verify the external event.	
4.	Select the **Edit** icon for the appropriate User.	
5.	In the User's record, click the **SF-182 Requests** tab.	
6.	Click the **Verify** link for the request to be verified.	
7.	Complete the form.	

See **Managing Data Entry and Searches** for more detailed information on searching.

Verifying External Training Requested via Form SF-182

Step	Activity	View
8.	Click **Submit** to send the form to the User's supervisor for approval. This allows the event to move into Learning History. **Note**: If you are also approving the verification to move into Learning History, check the **Submit Request as Approved** box before clicking **Submit**.	
9.	If the verification was not submitted as "Approved," confirm the supervisor's name and click **Submit**.	

Managing Items

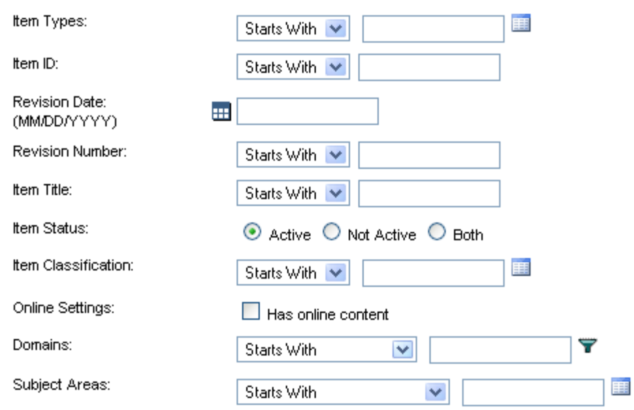
An Item is a learning requirement that can be learning content, an exam, a survey, OJT, or an external certification. Items can also be developed for online usage.

A Day-in-the-Life Scenario

A new Web-based course must be added to AgLearn. The course will replace current department training on the prevention of sexual harassment. The following activities must be accomplished:

- The Item must be available to all employees in the Training domain.
- The Item must be made available online and should be marked Complete when all objects are complete.
- Learners can re-enter the course after completion for refresher training.

Viewing an Item Record

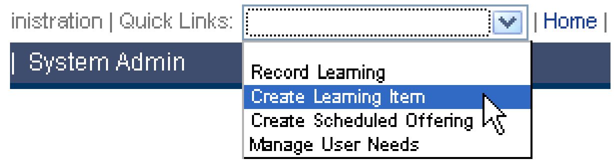
Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Items**.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Results** display, locate the desired Item.	
6.	Select the corresponding **View** icon to view the Item's Summary tab.	
7.	Click the Item's other data tabs to view additional information.	

Use Ctrl+F to quickly find an Item on the screen.

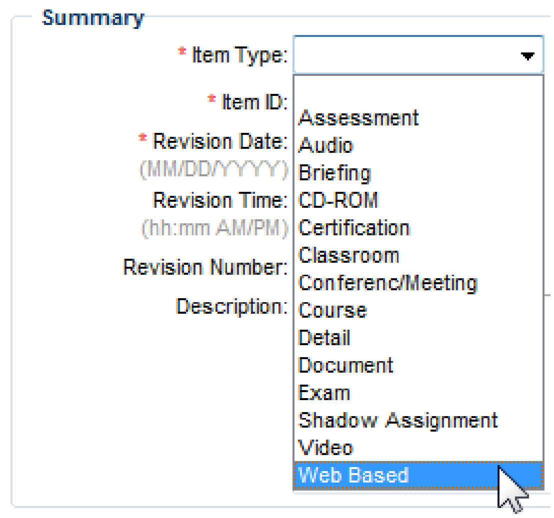
Adding an Item Record

Step | **Activity** | **View**

1. In the **Quick Links** pull-down menu, select **Create Learning Item.**



2. In the **Summary** box, pull down the **Item Type** menu and select the type of Item you want to create.



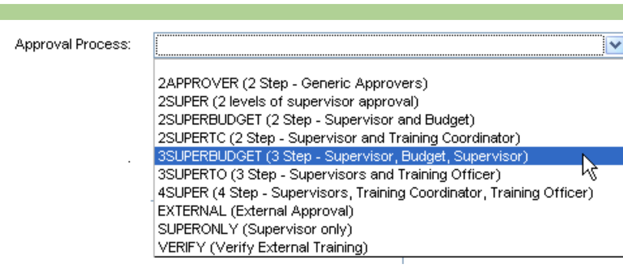
The Item ID should always begin with your Agency acronym. Consult with your AgLearn Agency Lead as to the established naming conventions for Items.

3. Enter an **Item ID**.

4. Enter a **Title**.

5. Enter your domain in the **Domain ID** box, or click the Search icon to find it.

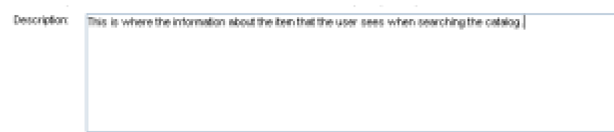
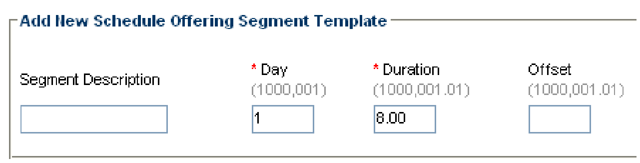
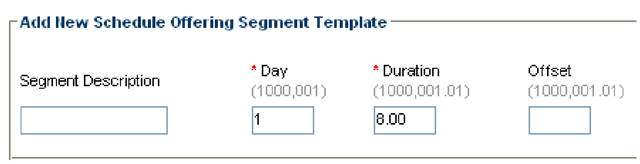
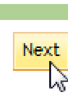
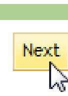
6. If approval is required, pull down the **Approval Process** menu and select the proper process.



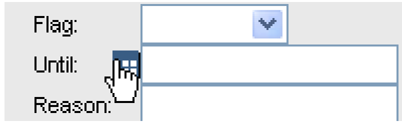
7. If an **Approval Process** was selected in Step 6, check the **Approval Required** box.

The description you enter here will appear when the user views the Item Details in the catalog.

Adding an Item Record

Step	Activity	View
8.	Enter a **description** for the new Item.	
9.	In the **Related Subject Areas** box, click the Search icon and select the proper subject area(s) associated with the new Item.	
10.	Click **Next**.	
11.	If the Item is Instructor-Led, fill in the default **Segment Description**, **Day**, and **Offset** (if any).	
12.	Click **Add**.	
13.	Repeat Steps 11 and 12 as needed, to create more default segments.	
14.	When you have all the segments you need, click **Next**.	
15.	Team AgLearn takes care of all content object-related data for online Items; click **Next**.	
16.	Enter the **Catalog** name and click **Add**; OR Click the Search icon and search for the catalog(s) you want.	

Adding an Item Record

Step	Activity	View
17.	Select a **Flag**, if necessary.	
18.	Indicate the last day of the flag's appearance.	
19.	Enter text in the **Reason** box that will appear to the User when the cursor is passed over this Item in the catalog.	
20.	Enter an expiration date for the Item in the **Expires** field, if necessary.	
21.	Click **Next**.	
22.	If you want to continue on and create a Scheduled Offering for this Item, check the **Schedule an offering of this item now** box in the lower left corner of the screen.	
23.	Verify your information. If you are satisfied, click **Submit** to complete, or to launch the Create Scheduled offering Wizard.	

Editing an Item Record

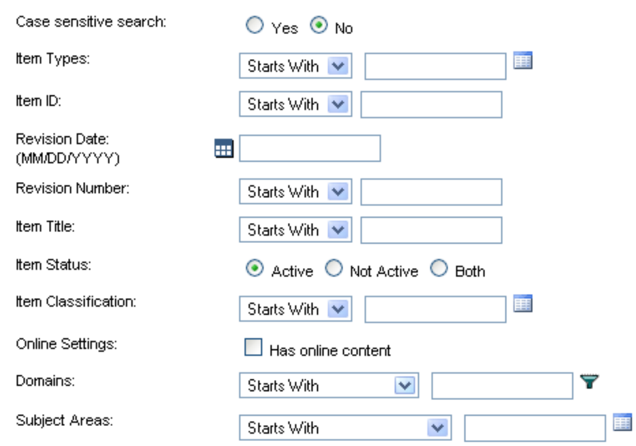
Step | **Activity** | **View**

1. Select the **Learning** menu.

2. Select **Items**.

3. On the **> Search** screen, enter the appropriate search criteria.

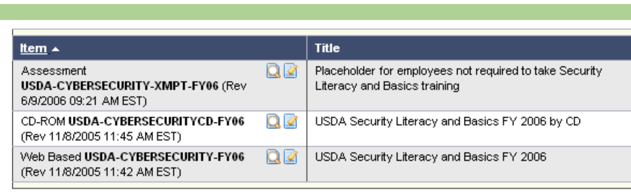
Note: See **Managing Data Entry and Searches** for more detailed information on searching.



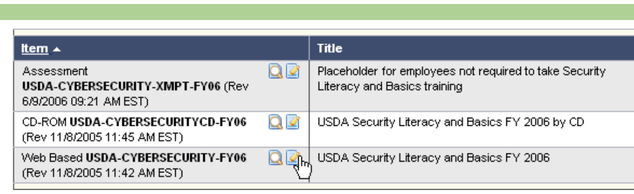
4. Click **Search**.

5. On the **Results** display, locate the desired Item.

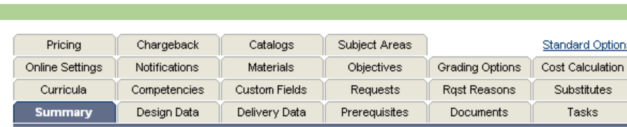
Tip: Use **Ctrl+F** to quickly find an Item on the screen.



6. Select the corresponding **Edit** icon to view the Item's Summary tab information.



7. Click the appropriate tab to edit data.

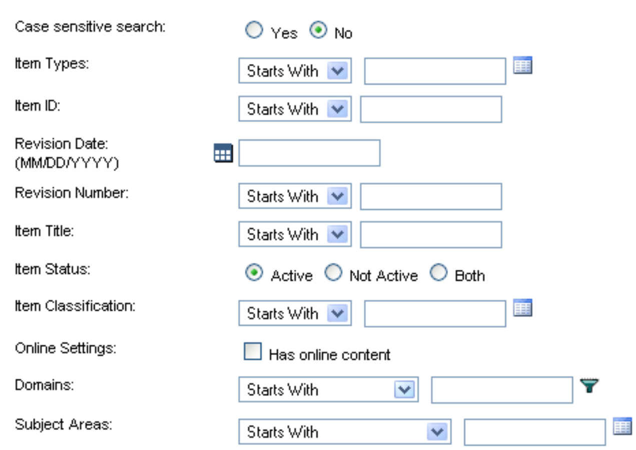
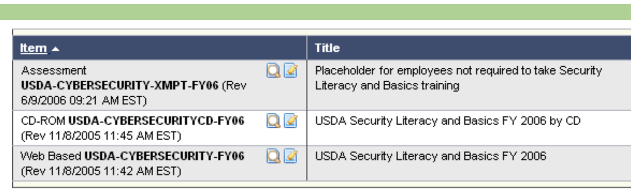
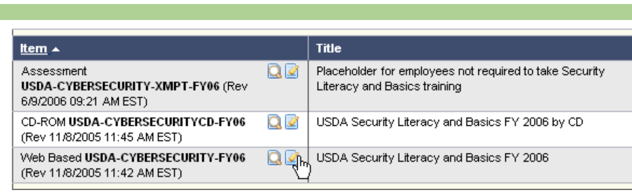


Caution: Do not select a different tab prior to clicking **Apply Changes** or all changes will be lost.

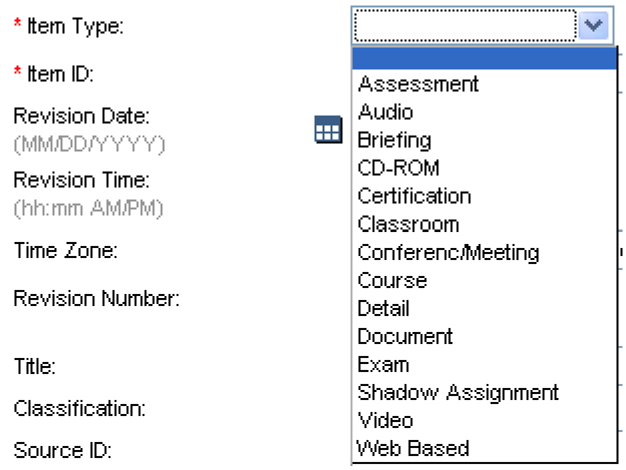
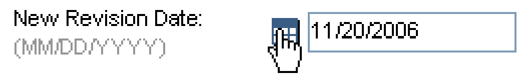
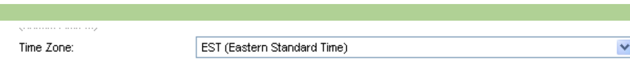
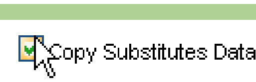
8. Make the appropriate changes and click **Apply Changes**.

Tip: If an Item can not be located, search for the Item in other domains. During data entry, the Item may have been mistakenly placed in an incorrect domain.

Copying an Item Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Items**.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Results** tab, locate the desired Item. **Tip**: Use **Ctrl+F** to quickly find an Item on the screen.	
6.	Select the corresponding **Edit** icon to view the Item's Summary tab information.	
7.	Click **Copy Item…**.	

Copying an Item Record

Step	Activity	View
8.	Select the **Item Type** from the drop-down list.	
9.	Complete the **New Item ID** field. (Check current AgLearn naming standards.)	
10.	Click the **New Revision Date** Calendar icon and select a new revision date for the Item.	
11.	Enter a **Revision Time**.	
12.	Select the correct **Time Zone** from the Time Zone drop-down list..	
13.	Select **Copy Authorized to Instruct Data** to copy this data to the new Item.	
14.	Select **Copy Substitutes Data** to copy this data to the new Item.	
15.	Select **Copy Related Competency Data** to copy this data to the new Item.	
16.	Select **Copy Related Document Data** to copy this data to the new Item.	

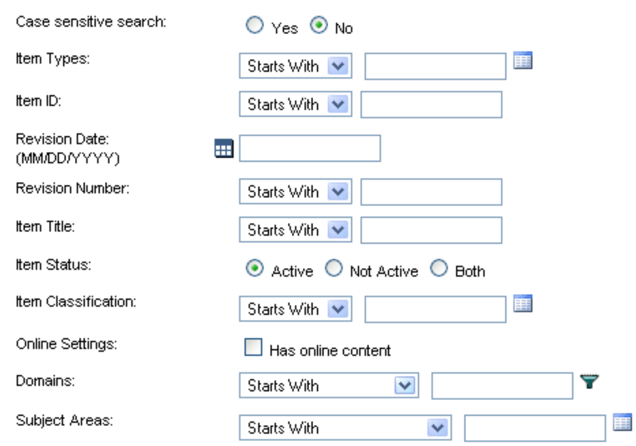
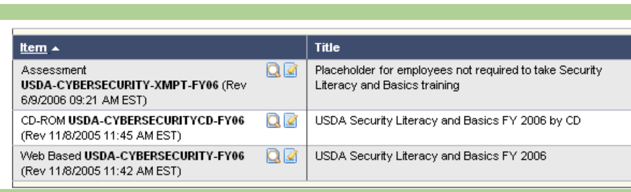
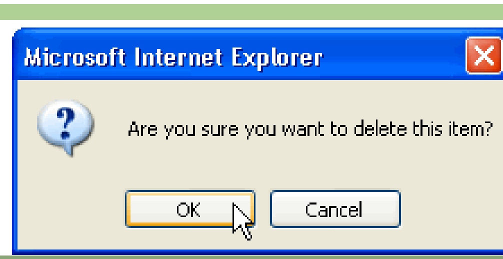
Copying an Item Record

Step	Activity	View
17.	Select **Copy Related Task Data** to copy this data to the new Item.	
18.	Select **Copy Prerequisite Data** to copy this data to the new Item.	
19.	Select **Copy Request Data** to copy this data to the new Item.	
20.	Select **Copy Online Settings** to copy this data to the new Item.	
21.	Select **Copy Instructor Costs** to copy this data to the new Item.	
22.	Select **Add the new Item to the catalog** to add the item to the catalog.	
23.	Click **Copy**. **Note**: If the record is not associated with any other element in the application, there will be a **Delete old record after copy** check box. Select the checkbox to delete the old record after making a copy.	

Tip: To avoid data formatting errors when entering dates, use the Calendar Icon Assistant.

Note: See **Using the Selection Icon Assistant** for more detailed information pertaining to the Selection icon. See **Using the Calendar Icon Assistant** for more detailed information pertaining to the Calendar icon.

Deleting an Item Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Items**.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Results** display, locate the desired Item. **Tip**: Use **Ctrl+F** to quickly find an Item on the screen.	
6.	Select the corresponding **Edit** icon to view the Item's Summary tab information.	
7.	Click **Delete**.	
8.	Click **OK** in the **Confirmation** box. **Caution**: Be certain that the Item selected should be deleted. If unsure, click **Cancel**.	

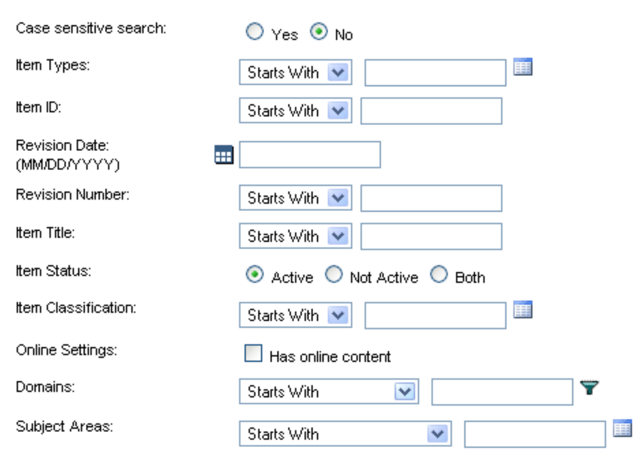
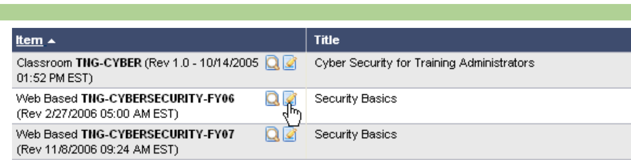
Note: Items cannot be deleted once they have been associated with a catalog or assigned to a user.

The Item Revision Assistant

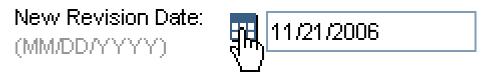
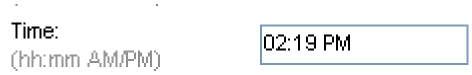
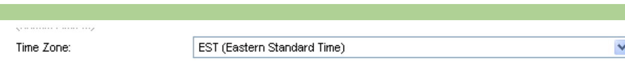
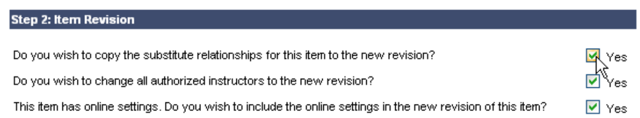
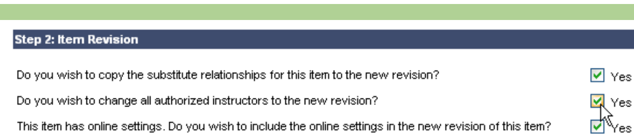
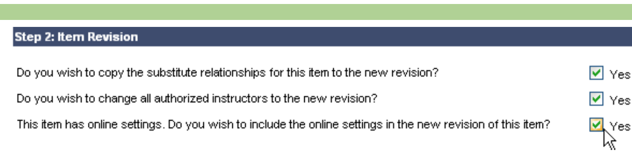
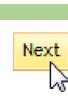
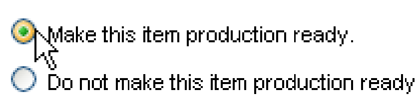
When editing an Item to create a new version (a revision) of that Item, the **Item Revision Assistant** provides on-screen instructions for each step of the revision process.

The **Item Revision Assistant** steps include: **Step 1: Item Revision** (Revision # and Date); **Step 2: Item Revision** (Relationships and Instructors); **Step 3: Item Revision** (Making Item Production Ready); **Step 4: Item Revision** (Update Curricula and To-Do Lists)**;** and the **Final Step: Complete**, which displays all of the choices made in previous steps.

The Item Revision Assistant

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Items**.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Results** display, locate the desired Item. **Tip**: Use **Ctrl+F** to quickly find an Item on the screen.	
6.	Select the corresponding **Edit** icon to view the Item's Summary tab information.	
7.	Click the **Revise…** button to start the **Item Revision Assistant**.	

The Item Revision Assistant

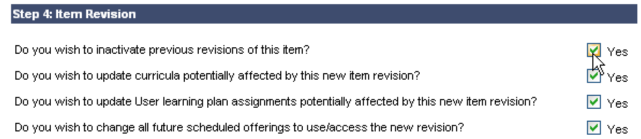
Step	Activity	View
8.	Click the **Revision Date** calendar icon to select and enter a revision date.	
9.	Enter a revision time in the **Time** field.	
10.	Click the **Time Zone** selection icon to search for and enter a Time Zone.	
11.	Enter a **Revision Number**.	
12.	Enter a revised **Title**, if applicable.	
13.	Click **Next** to move to Step 2.	
14.	Select the **Yes** check box to copy the substitute relationships for this Item to the new revision.	
15.	Select the **Yes** check box to allow all authorized instructors to be authorized to teach the new, revised Item.	
16.	Select the **Yes** check box to include the online settings in the new revised Item. **Note**: This check box only appears when an online Item is being revised.	
17.	Click **Next** to move to Step 3.	
18.	Click one of the option buttons to indicate whether or not to make the new revision of this Item production ready.	

The Item Revision Assistant

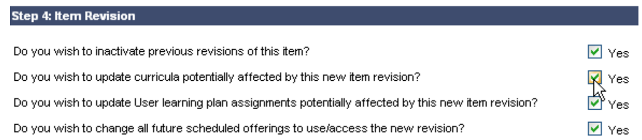
Step | **Activity** | **View**

19. Click **Next** to move to Step 4.

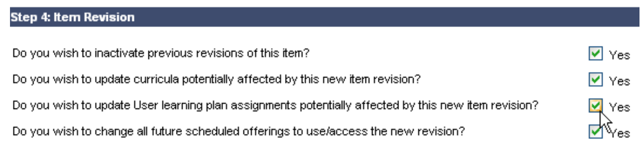
20. Select the **Yes** check box to inactivate previous revisions of this Item.



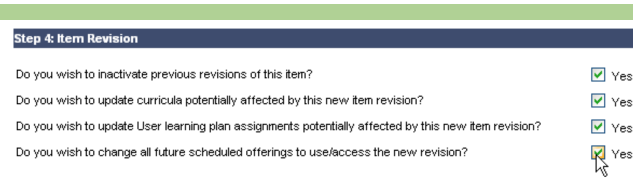
21. Select the **Yes** check box to update all curriculums potentially affected by the new revision.



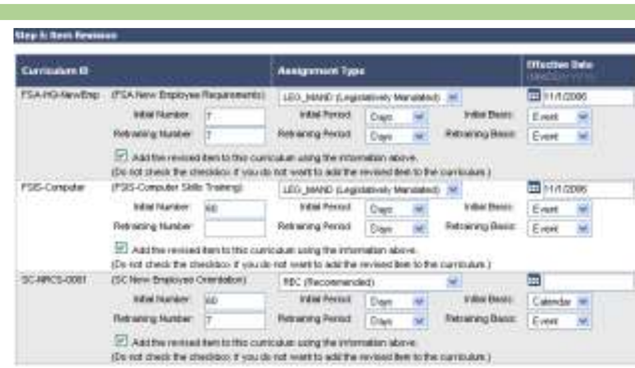
22. Select the **Yes** check box to update To-Do List assignments potentially affected by the new revision.



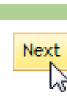
23. Select the **Yes** check box to change all future scheduled offerings to use/access the new revision.



24. Make any curriculum-related edits that are necessary.

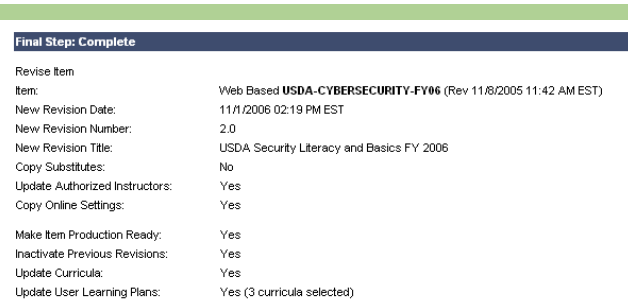


25. Click **Next** to move to the Final Step.



26. Review the display of selections made and data entered in the previous steps.

Tip: Click the **Previous** button to move to previous screens to revise any data entered.



The Item Revision Assistant

Step	Activity	View
27.	Click **Run Job Now** or **Schedule Job** to have AgLearn complete the assignment to User record(s). **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
28.	Review and revise any of the other Item data as required. **Caution**: If a Validation Error appears, you must correct the errors before the Assistant can be completed and the job scheduled. **Note**: See **Edit an Item Record** for more information on editing Items.	

Caution: Do not use the browser's **Back** button when using AgLearn – use the menus, links, and breadcrumbs to navigate.

Tip: To avoid data formatting errors when entering dates, use the Calendar Icon Assistant.

Managing Documents

A document is any media item (book, videotape, procedure, manual, audiotape, regulation, etc.) for which a record has been created, enabling it to be tracked. Documents are associated with Items, Curricula and/or Tasks.

Document management tasks are accessible from the **References > Documents** menu.

Managing Document subtasks include: **View a Document Record**, **Add a Document Record**, **Edit a Document Record**, and **Delete a Document Record**.

A Day-in-the-Life Scenario

The current version of the Intro to Microsoft Excel (TRN-DOCUMENT1) job aid must be verified. Find the document and verify that the current version has been reviewed for its applicability to the course material.

Notes

Viewing a Document Record

Step | **Activity** | **View**

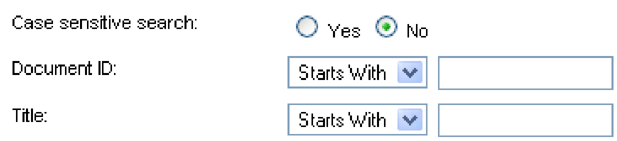
1. Select the **Content** menu.

2. Select **Documents**.

You can perform either a Simple or Advanced Search depending upon the level of detail you need for your search.

3. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.

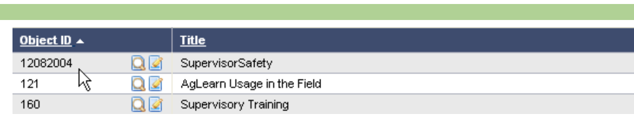


4. Click **Search**.

If the document is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain.

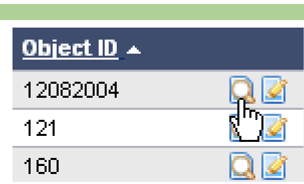
5. Locate the desired document.

Tip: Use Ctrl+F to quickly find an Item on the screen.



After selecting the **View** link, the **> Search > Search Results > View Summary** screen appears.

6. Select the corresponding **View** icon to view more information.



Notes

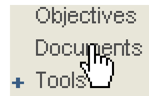
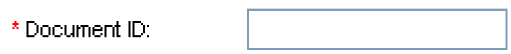
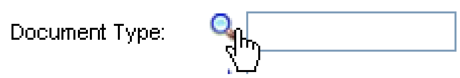
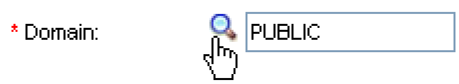
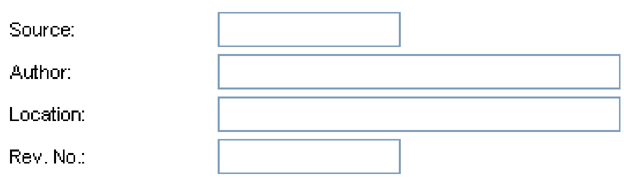
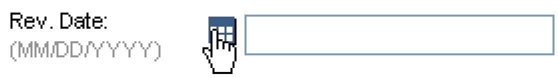
The purpose of creating a document record is to associate the document with an Item or Curricula. There is a **Document** tab in the Item and in the Curricula record that is used to create the association. See **Edit an Item** for additional information.

Once a Document record is in AgLearn, it is assigned to Items and Curricula through the Items and Curricula menus.

Type the electronic address of the document in the **Location** field to create the link from the Document in the Item with the actual Document.

Caution: A **Validation Error** field will appear if all required fields are not complete.

Adding a Document Record

Step	Activity	View
1.	Select the **Content** menu.	
2.	Select **Documents**.	
3.	Select the **Add New** link.	
4.	Enter a document ID in the **Document ID** field.	
5.	Enter a document title in the **Title** field.	
6.	Select the **Active** check box if the document is active.	
7.	Click the **Document Type** search icon to search for and enter a document type.	
8.	Click the **Domain** search icon and select the domain.	
9.	Enter the **Source**, **Author**, **Location** and **Rev**. **No**. (revision number) for the document.	
10.	Click the **Revision Date** calendar icon to select and enter a revision date.	
11.	Enter the **Reviser**, **Approver**, and **Comments** for the document in their respective fields.	
12.	Click **Add**.	

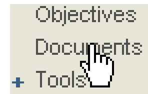
Notes

Editing a Document Record

Step | **Activity** | **View**

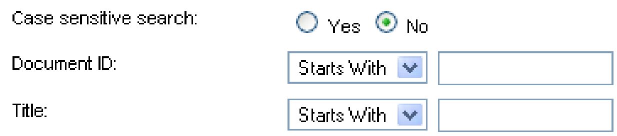
1. Select the **Content** menu.

2. Select **Documents**.



3. On the **> Search** screen, enter the appropriate search criteria.

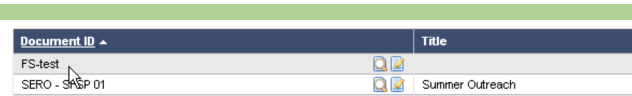
Note: See **Managing Data Entry and Searches** for more detailed information on searching.



If the document is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

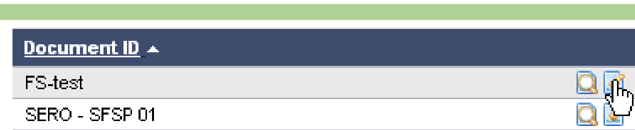
4. Click **Search**.

5. Locate the desired document.



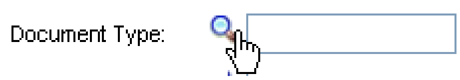
Use Ctrl+F to quickly find an Item on the screen.

6. Select the corresponding **Edit** icon to review the document information.



7. Select the **Active** check box to indicate the document is active.

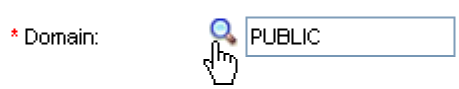
8. Click the **Document Type** search icon to select a document type.



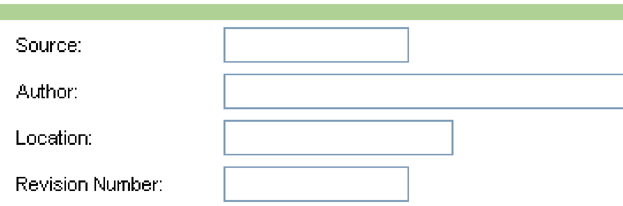
Required fields are identified by a red asterisk. Although remaining fields are not required, you should complete as many as you feel necessary.

9. Click the **Domain** search icon and enter a different domain, if appropriate.

Caution: **Domain** is a Required Field.

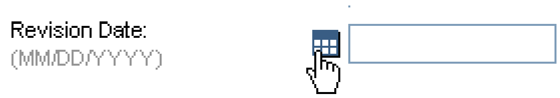
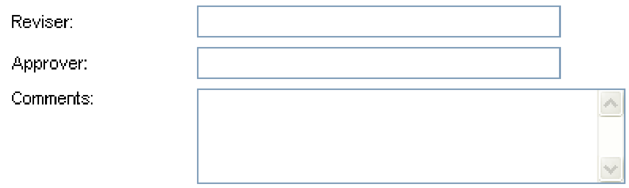
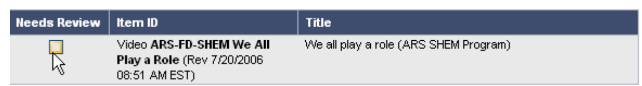
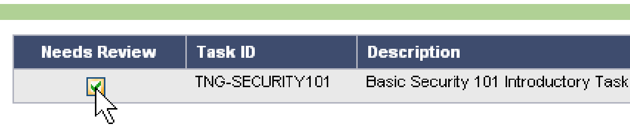
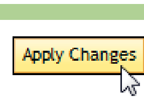


10. Enter the **Source**, **Author**, **Location** and **Revision Number** for the document in their respective fields if this information has changed.



Notes

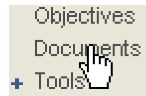
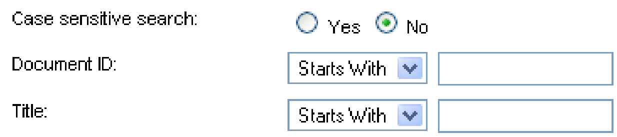
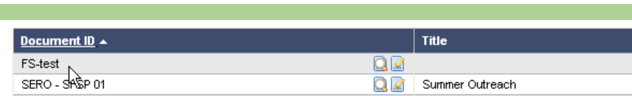
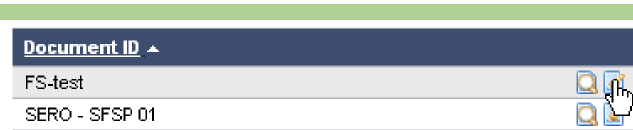
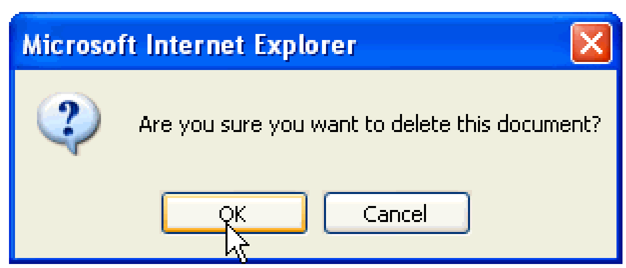
Editing a Document Record

Step	Activity	View
11.	Click the **Revision Date** calendar icon to select and enter a revision date.	
12.	Enter the **Reviser**, **Approver**, and **Comments** for the document in their respective fields if this information has changed.	
13.	Click on the **Item** tab to review the Items to which the document is linked.	
14.	Select the **Needs Review** check box where appropriate. **Note**: The **Needs Review** check box will be automatically checked when the revision numbers of the Document and/or Item are changed.	
15.	Click on the **Curricula** tab to review the Curricula to which the document is linked.	
16.	Select the **Needs Review** check box where appropriate.	
17.	Click on the **Tasks** tab to review the Tasks to which the document is linked.	
18.	Select the **Needs Review** check box where appropriate.	
19.	Click **Apply Changes**.	

The Needs Review check box will be automatically checked when the revision numbers of the Documents and/or Curricula are changed.

Notes

Deleting a Document Record

Step	Activity	View
20.	Select the **References** menu.	
21.	Select **Documents**.	
22.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
23.	Click **Search**.	
24.	Locate the desired document. **Tip**: Use **Ctrl+F** to quickly find a document on the screen.	
25.	Select the corresponding **Edit** icon to delete the document record.	
26.	Click **Delete**.	
27.	Click **OK** in the Confirmation box.	

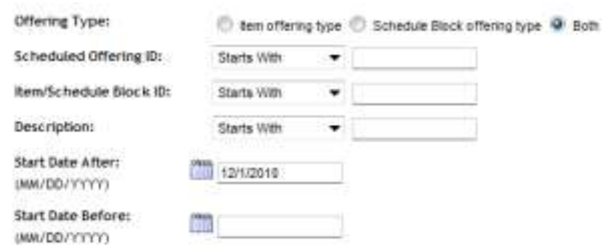
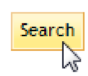
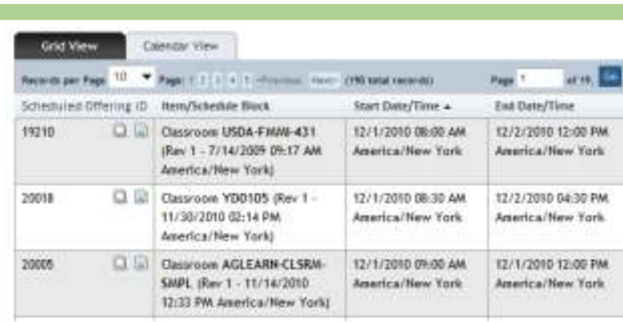
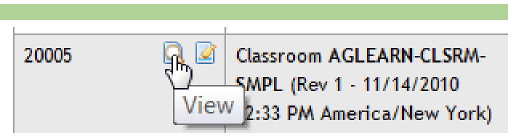
If the document is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

Managing Scheduled Offerings

The Create Scheduled Offering screens are used to create a scheduled offering, assign it resources, and break it up into segments with the appropriate resources. You can enter the vital information and then edit it later on. You will associate an item, set up the segment, and select resources. The system will alert you to any scheduling conflicts right away so that you are aware of them and can make the necessary adjustments. The Calendar Preview gives you a graphic view of your new offering and any conflicts. Subtasks pertaining to Scheduled Offerings are accessible via the Learning menu. Scheduled Offering-specific subtasks include the following: **View**, **Add**, **Edit**, **Copy**, **Cancel**, **Close**, and **Delete a Scheduled Offering Record**, and **Use the Scheduled Offering Notification Assistant Tool**.

Notes

Viewing a Scheduled Offering Record

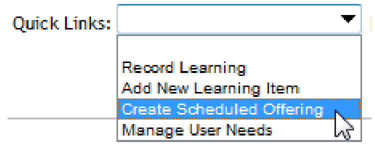
<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Select the Learning menu.</td><td>
</td></tr>
<tr><td>2.</td><td>Select Scheduled Offerings.</td><td>
</td></tr>
<tr><td>3.</td><td>On the > Search screen, enter the appropriate search criteria.</td><td>
</td></tr>
<tr><td>4.</td><td>Click Search.</td><td>
</td></tr>
<tr><td>5.</td><td>In the Grid View, locate the desired Scheduled Offering.
Tip: Use the Ctrl+F function to quickly find a Scheduled Offering on the screen.</td><td></td></tr>
<tr><td>6.</td><td>Select the corresponding View icon to view more information.</td><td>
</td></tr>
</table>

A Scheduled Offering is also viewable by clicking the **Calendar View** tab on the > Search results screen and then the desired Offering ID link to open the corresponding record.

Add a New Scheduled Offering Record

Step	Activity	View

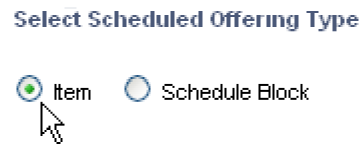
1. Select **Add New Scheduled Offering** from the Quick Links menu.



Notes: A new scheduled offering can also be created by clicking the **Schedule** button on the Item Summary Tab, or by clicking **Add New** from the Scheduled Offering search screen

2. Click the **Item** option button.

Note: **Item** is the default selection.



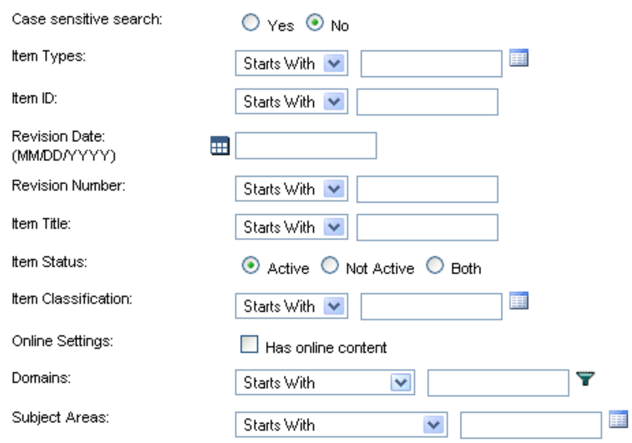
3. In the **Identify the Scheduled Offering** box, click the **Item ID** Search icon to find the item for which you'll create the offering.

Note: Selecting the item in this manner will automatically fill in the **Item Type** and **Title** fields.

Required fields are identified by a red asterisk. Although remaining fields are not required, you should complete as many as you feel are necessary.

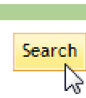
4. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



.

5. Click **Search**.



6. Locate the desired Item and select the corresponding **Select** link.

By using the selection icon, the Item ID and Title automatically appear in their respective fields

7. Enter a description if you wish to distinguish this offering from others that may be created.

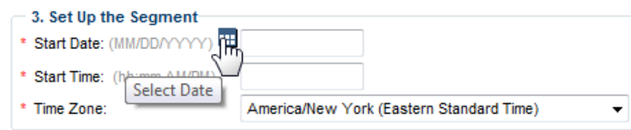
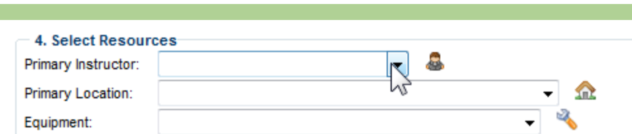
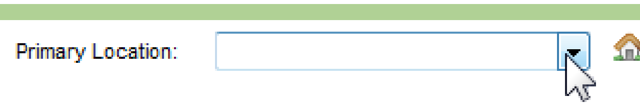
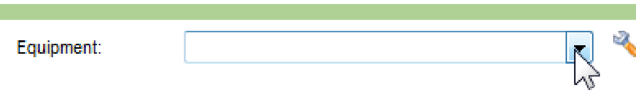
The description field is new in version 6.1. While the Title field refers to the Item, the description field is specific to the scheduled offering.

Notes

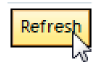
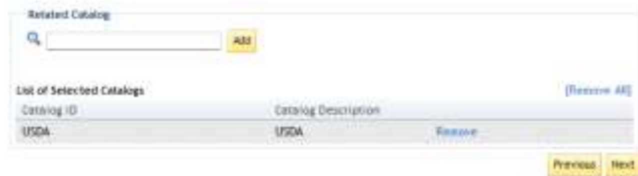
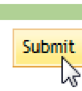
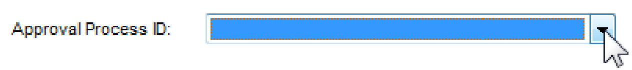
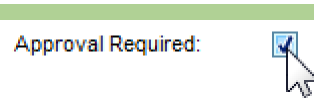
A segment is a unit of time within a Scheduled Offering. Segments enable these units to be associated with resources, such as a location, instructors and equipment.

The Time Zone field defaults to the time zone in which the Scheduled Offering will occur.

Add a New Scheduled Offering Record

Step	Activity	View
8.	Click the **Domain** selection icon to search for and enter a domain.	
9.	From the Facility drop-down list, select the facility where the scheduled offering will take place.	
10.	Click the **Segment Start Date** calendar icon to select and enter a start date. **Note**: A Scheduled Offering must have at least one segment.	
11.	Enter a start time in the **Segment Start Time** field. **Note**: Use the following time convention: hh:mm AM/PM.	
12.	Click the **Time Zone** drop-down list to search for and enter the correct time zone.	
13.	In the Select Resources section, click the Primary Instructor drop-down list to search for and select an instructor authorized to teach the Scheduled Offering.	
14.	Click the Primary Location drop-down list to search for and select the primary location for the scheduled offering.	
15.	Click the Equipment drop-down list to search for and select equipment to be reserved for the scheduled offering.	

Add a New Scheduled Offering Record

Notes	Step	Activity	View
	16.	Click **Refresh**.	
	17.	Click **Next**.	
	18.	The catalog(s) associated with the item will appear. You do not need to click the search icon unless you remove a catalog and then decide include the catalog in the Scheduled Offering.	
	19.	Click **Next**.	
	20.	Review the summary screen to confirm that the data for the scheduled offering is correct. If necessary, click **Previous** to return to earlier screens to modify data.	
As soon as the admin clicks the **Submit** button, the Scheduled Offering is created and the record's Summary tab displayed.	21.	When you are sure all data is correct, click **Submit** to create the record and display the Summary tab.	
	22.	Click the **Approval Process ID** drop down list to select the approval process associated with the scheduled offering.	
Users will be able to register, but will be placed in a Pending status until the supervisor approves the training request.	23.	Select the **Approval Required** checkbox if approval is required for users to enroll in the scheduled offering	
This is the person who can best answer questions about this scheduled offering.	24.	Enter the name of the point of contact for the scheduled offering.	

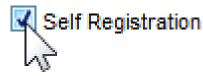
Add a New Scheduled Offering Record

Notes	Step	Activity	View
	25.	Enter the point of contact's e-mail address in the **Email** field.	Email:
	26.	Enter the point of contact's **Phone** and **Fax** numbers (if available) in their respective fields.	Phone: Fax:
	27.	Select or deselect the **Active** check box to affect the Scheduled Offering's availability. **Note**: The default setting for the **Active** check box is active.	Active:
	28.	Check the **Auto Fill Registration** checkbox, if you wish to automatically replace users who withdraw from the scheduled offering with users on the waitlist.	Auto Fill Registration:
	29.	Enter Comments to describe the scheduled offering to other administrators.	Comments:
	30.	In the **Edit the Registration for the Scheduled Offering** section, click the **Calendar** icon to set the Registration Cut-off Date.	Registration Cut-off Date: (MM/DD/YYYY)
This is the last date when enrollments to the offering should be allowed. Users are prevented from enrollments after this date, although admins can override.	31.	Enter the Registration Cut-off Time.	Registration Cut-off Time: (hh:mm AM/PM)
	32.	Enter the minimum registration needed to conduct the offering, and the maximum registration capacity.	Minimum Registration: (1000,001) Maximum Registration: (1000,001)

Notes

If you attempt to register more users than the maximum capacity, you will be warned but not prevented from recording the enrollments

Add a New Scheduled Offering Record

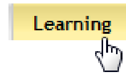
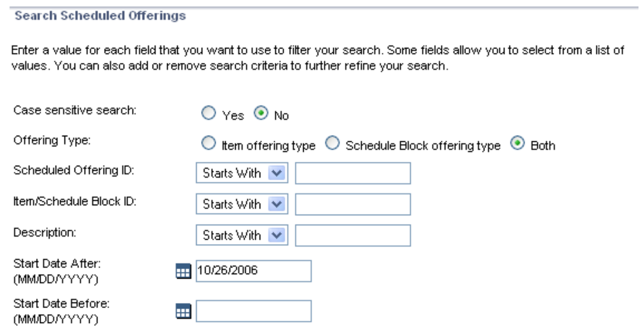
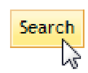
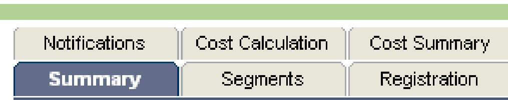
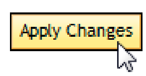
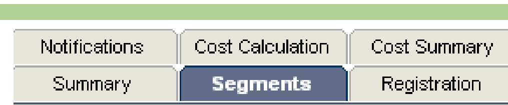
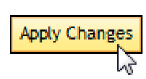
Step	Activity	View
33.	Check **the Self Registration** checkbox if users should be allowed to register themselves in this offering from their To-Do List.	
34.	Click **Apply Changes**.	

Notes

When you create a scheduled offering, it’s a good idea to jot down the Scheduled Offering ID so that you’ll be able to quickly find the record in a search.

Use Ctrl+F to quickly find a Scheduled Offering.

Edit a Scheduled Offering Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Scheduled Offerings**.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	Locate the desired Scheduled Offering and click the corresponding **Edit** icon to edit the Scheduled Offering.	
6.	Make the appropriate changes to information on the **Summary** tab.	
7.	Click **Apply Changes**.	
8.	Click the **Segments** tab and make the appropriate changes.	
9.	Click **Apply Changes**.	

Notes

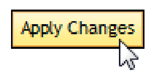
Edit a Scheduled Offering Record

Step | **Activity** | **View**

10. Click the **Registration** tab and make the appropriate changes.

Note: To learn more about adding Users to a Scheduled Offering, see **Managing Scheduled Offering Registrations**. To learn more about adding slots to a Scheduled Offering, see **Managing Scheduled Offering Slots**.

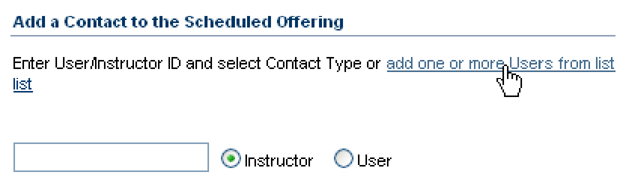
11. Click **Apply Changes**.



12. Click the **Contacts** tab.

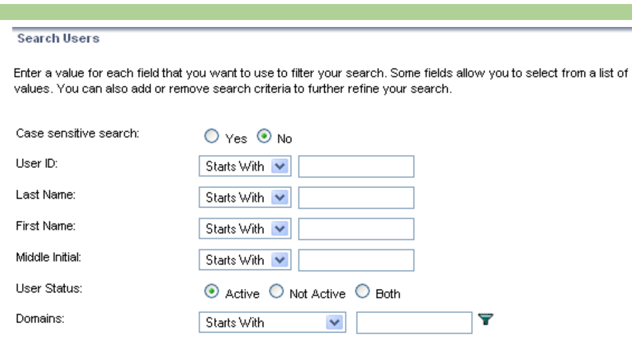
If you know the Learner/Instructor ID, you can enter it directly in the **Learner/Instructor ID** field, select the appropriate option button, and click **Add**.

13. Select **Add one or more Users (instructors) from list** to select and enter a contact.

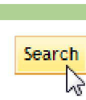


14. On the **> Search** screen, enter the appropriate search criteria.

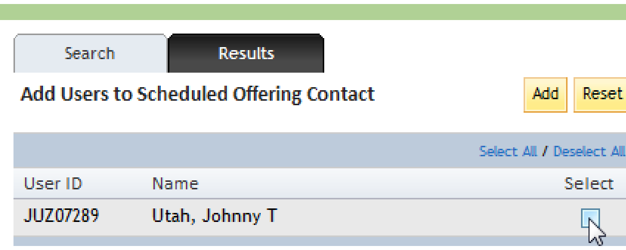
Note: See **Managing Data Entry and Searches** for more detailed information.



15. Click **Search**.



16. On the **Results** display, select the **Select** check box for each User to be added as a contact.



Notes

Edit a Scheduled Offering Record

Step	Activity	View
17.	Click **Add** to return to the **Contacts** tab. **Note**: Repeat the last 4 steps to add additional contacts on this tab.	
18.	Click **Apply Changes**.	

Tip: If a Scheduled Offering cannot be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

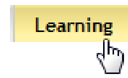
Notes

Copy a Scheduled Offering Record

Step | **Activity** | **View**

Rather than create a new Scheduled Offering, you may want to copy a similar one, and then edit the record to customize.

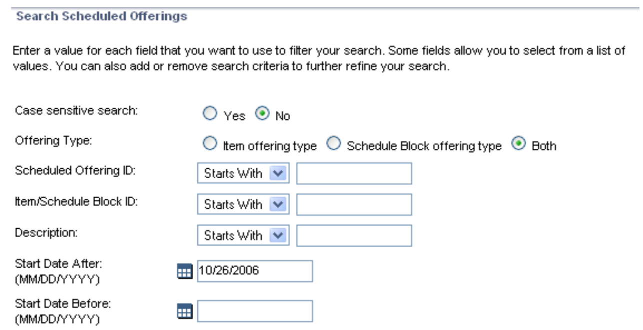
1. Select the **Learning** menu.



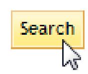
2. Select **Scheduled Offerings**.

3. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



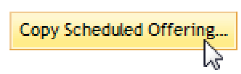
4. Click **Search**.



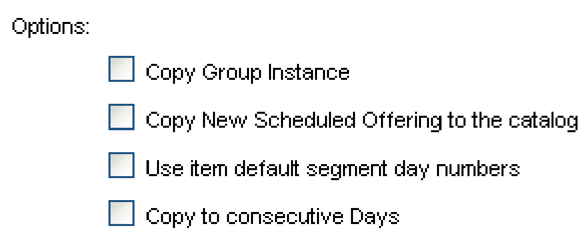
Use the Ctrl+F function to quickly find a Scheduled Offering on the screen.

5. Locate the desired Scheduled Offering and click the corresponding Edit icon to edit the Scheduled Offering.

6. Select the corresponding **Copy Scheduled Offering** button.

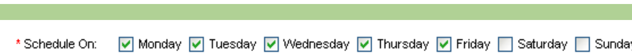


7. Select the check box(es) corresponding to the element(s) of the existing record that should remain the same.



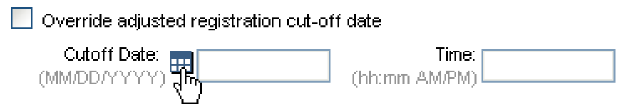
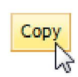
8. Click the **New Start Date** calendar icon to select and enter a different start date.

9. Select the appropriate **Schedule On** check box(es).



Notes

Copy a Scheduled Offering Record

Step	Activity	View
10.	If the original Scheduled Offering had a registration cut-off date, the new offering will cut off registrations the same number of days before the offering. If you change this date, use the **Cutoff Date** calendar icon to enter a new cutoff date and the **Time Zone** selection icon to change the time zone.	
11.	Click **Next**.	
12.	Select or deselect the **Notification** check box (whichever is appropriate) to have AgLearn send e-mail notifications to those persons who will be affected by the changes to this Scheduled Offering.	
13.	Click **Copy**.	

The default setting for the Notification check box is active.

Tip: To avoid data formatting errors, use the **Calendar** icon assistant.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Calendar** icon.

Notes

Scheduled Offerings that have enrollees can only be deleted once they are cancelled. The **Cancel A Scheduled Offering Assistant** provides an opportunity to notify enrollees and those waitlisted and move them to a request list for the Item.

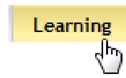
The default date for the cancellation is the current date. A Scheduled Offering can only be cancelled on a future date, not a past.

For the purposes of this toolkit, cost is not being addressed, and as such you should not make any changes to the **> Step 1 > Step 2** screen.

Cancel a Scheduled Offering

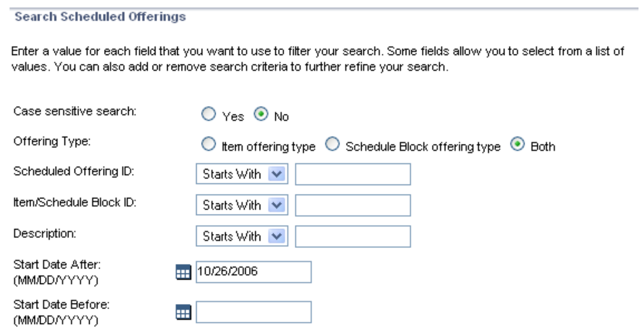
Step | **Activity** | **View**

1. Select the **Learning** menu.



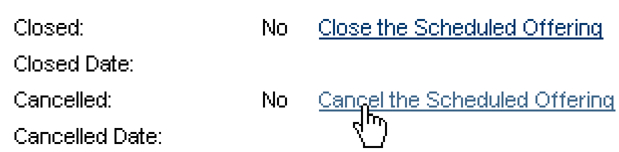
2. Select **Scheduled Offerings**.

3. Search for the **Scheduled Offering** to be canceled.

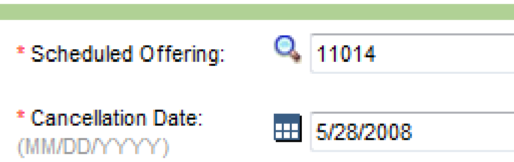


4. Find the Scheduled Offering to be canceled and click the **Edit** icon.

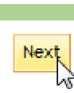
5. On the **Summary** screen, click **Cancel the Scheduled Offering**.



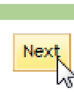
6. Verify the **Scheduled Offering** and **Cancellation Date**. Modify either as necessary.



7. Click **Next**.



8. Click **Next** to skip the **Edit Realized Costs** screen.



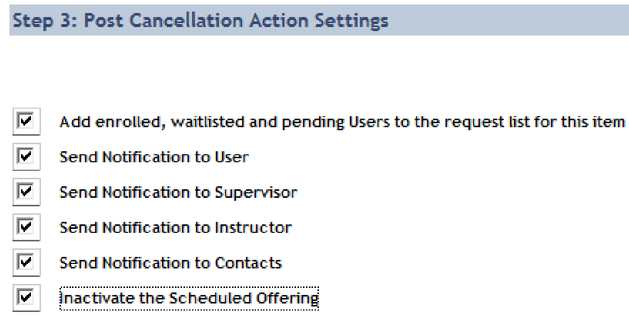
9. Select the **Add enrolled, waitlisted and pending Users to the request list for this item** check box if it is applicable to this Scheduled Offering.

Notes

Cancel a Scheduled Offering

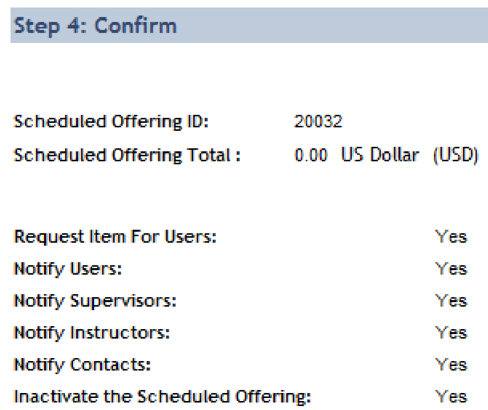
Step | **Activity** | **View**

10. Select the **Send Notification to User**, **Supervisor**, **Instructor**, or **Others**, and **Inactivate the Scheduled Offering** check boxes if applicable.



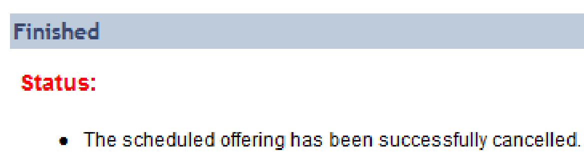
11. Click **Next**.

12. Review the summary of cancellation changes.



13. Click **Finish**.

14. On the **Finished** screen, review the Scheduled Offering's status.

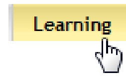


Notes

Close a Scheduled Offering

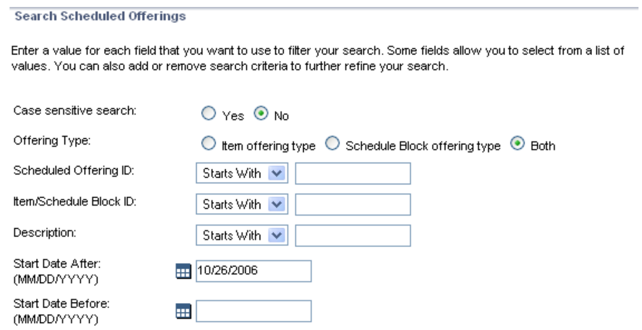
Step | **Activity** | **View**

1. Select the **Learning** menu.



2. Select **Scheduled Offerings**.

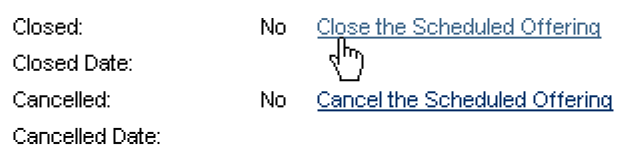
3. Search for the **Scheduled Offering** to be closed.



4. Find the Scheduled Offering to be closed and click the **Edit** icon.

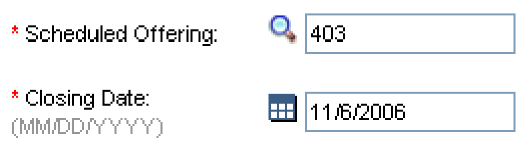
5. Click the **Close the Scheduled Offering** link.

Closing a Scheduled Offering is used for resource and cost verification purposes and may only be completed after the final segment of the scheduled offering has concluded.

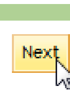


6. Verify the **Scheduled Offering** and **Closing Date**. Modify either as necessary.

Note: The closing date defaults to the current date.

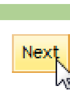


7. Click **Next**.

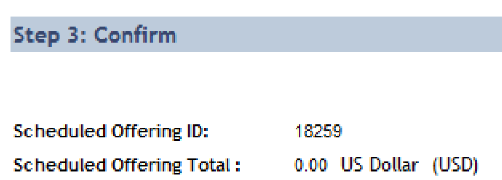


8. Click **Next**.

Note: This training is not addressing cost at this time.

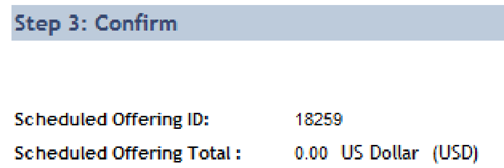
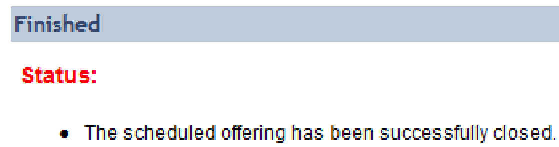


9. On the **Step 3**: **Confirm** screen, review the confirmation.



Notes

Close a Scheduled Offering

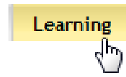
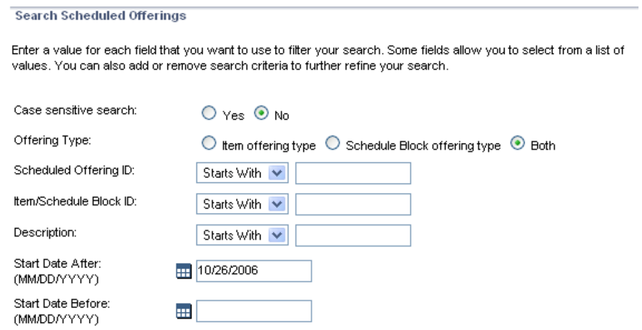
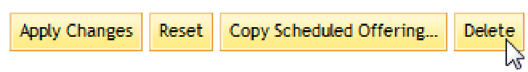
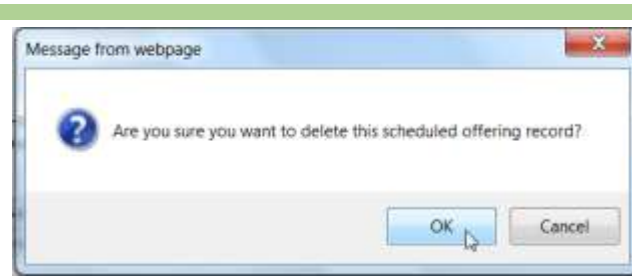
Step	Activity	View
10.	Click **Finish**. **Note**: Closing a Scheduled Offering removes it from the calendar.	
11.	On the **Finished** screen, review the Scheduled Offering's status.	

Tip: To avoid data formatting errors when entering dates and making selections, use the **Calendar** and **Selection** icons.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

Notes

Delete a Scheduled Offering Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Scheduled Offerings**.	
3.	Search for the **Scheduled Offering** to be deleted.	
4.	Find the Scheduled Offering to be closed and click the **Edit** icon.	
5.	Click the **Delete** button.	
6.	Click **OK** in the **Confirmation** box.	

If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

You can delete a Scheduled Offering only if it did not occur, there are no enrollees, and no persons waitlisted.

Managing Segments

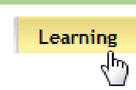
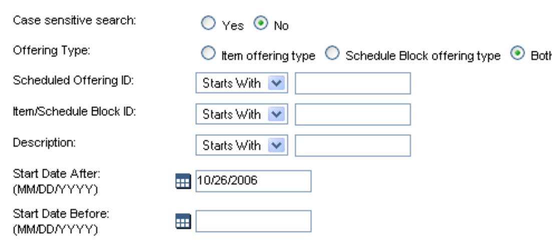
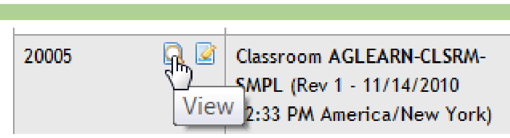
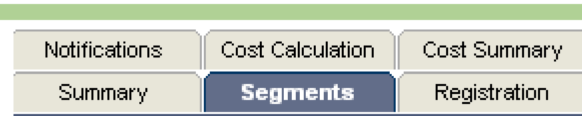
A Segment is a unit of division of a Scheduled Offering that facilitates variable resource scheduling. **Managing Segments** involves adding a new Scheduled Offering to the calendar and making corresponding resource assignments. Subtasks pertaining to Segments are accessible via the **Scheduling** menu. Segment-specific subtasks include the following: **View**, **Add**, **Edit a Scheduled Offering Segment**, **Copy Resources to Other Scheduled Offering Segments**, **Copy a Scheduled Offering's Daily Segments** and **Delete a Scheduled Offering Segment**.

A Day-in-the-Life Scenario

A new employee orientation course will need to begin with a one-hour introduction session in Building 57's auditorium, followed by a one-hour hands-on session in the computer lab on the following day.

Notes

View a Scheduled Offering Segment

Step	Activity	View
1.	Select the **Learning** menu.	
2.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
3.	Click **Search**.	
4.	Locate the desired Scheduled Offering. Select the **View** icon.	
5.	Click the **Segments** tab.	
6.	Locate the desired Segment and select **View**.	

Use Ctrl+F to quickly find a Scheduled Offering on the screen.

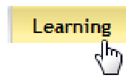
This provides the opportunity to view Segment details pertaining to instructors, locations, equipment, materials, and custom resources.

Notes

Add a Scheduled Offering Segment

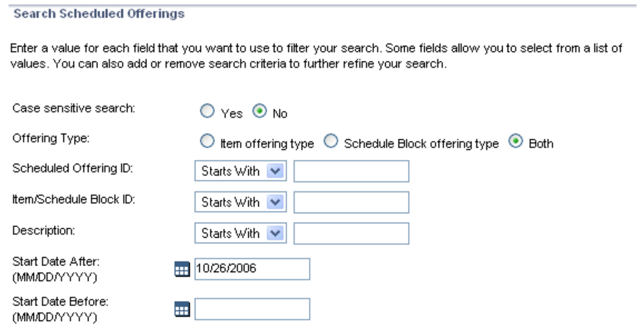
Step | **Activity** | **View**

1. Select the **Learning** menu.



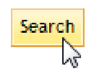
2. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

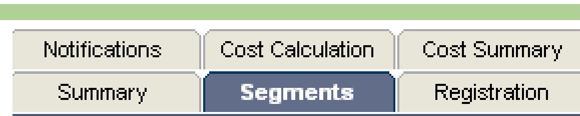
3. Click **Search**.



4. Locate the desired Scheduled Offering and click the **Edit** icon.

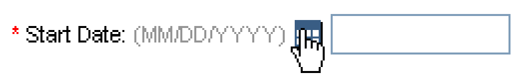
Tip: Use the **Ctrl+F** function to quickly find a Scheduled Offering on the screen.

5. Click the **Segments** tab.

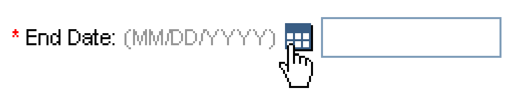


6. Scroll down to the **Add a Segment to the Scheduled Offering** section.

7. Click the **Start Date** calendar icon to select and enter a start date.

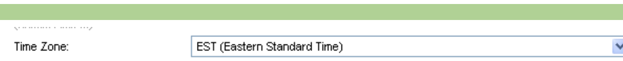


8. Click the **End Date** calendar icon to select and enter an end date.



The Time Zone field defaults to the time zone in which the Scheduled Offering occurs.

9. Click the **Time Zone** selection icon to search for and enter a time zone.



Notes

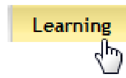
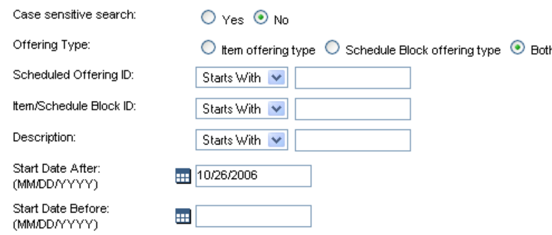
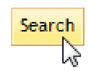
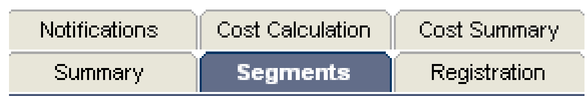
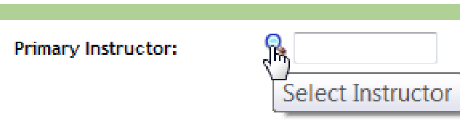
Add a Scheduled Offering Segment

Notes	Step	Activity	View
	10.	Enter a Segment start time in the **Start Time** field.	
	11.	Enter a Segment end time in the **End Time** field.	
	12.	Click the **Primary Instructor** selection icon to select the primary instructor.	
	13.	Enter a brief description in the **Segment Description** field.	
If the Location is already booked, it will not appear on the list.	14.	Click the **Primary Location** selection icon to search for and enter the primary location.	
	15.	Select the **Send Notification** check box to send e-mail notifications to those who will be affected by the changes.	
If a conflict(s) exists a message will appear providing the opportunity to view the conflict(s) by clicking **View**.	16.	Select the **Check Conflicts** check box to check for scheduling conflicts created by adding the Segment.	
	17.	Click **Add**.	

Tip: To avoid data formatting errors use the Calendar and Selection icon assistants.

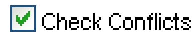
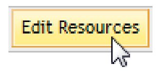
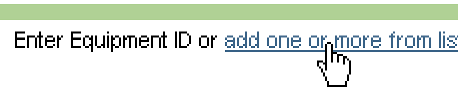
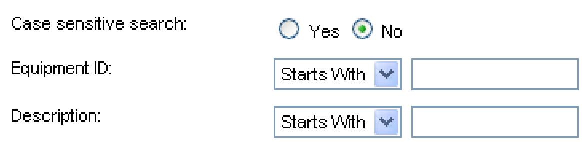
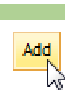
Notes

Edit a Scheduled Offering Segment

Step	Activity	View
1.	Select the **Learning** menu.	
2.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
3.	Click **Search**.	
4.	Locate the desired Scheduled Offering and click the **Edit** icon.	
5.	Click the **Segments** tab.	
6.	Scroll down to the **Update the Segments for the Scheduled Offering** section.	
7.	Locate the desired Segment.	
8.	Click the **Primary Instructor** selection icon to select and add an instructor to the Segment.	
9.	Click the **Primary Location** selection icon to select and add a location to the Segment.	
10.	Select the **Send Notification** check box to notify interested parties of the changes.	

Use Ctrl+F to quickly find a Scheduled Offering on the screen. (Note for step 4)

Edit a Scheduled Offering Segment

Notes	Step	Activity	View
	11.	Select the **Check Conflicts** check box to see if there are any conflicts scheduling the location.	
	12.	Click **Apply Changes**.	
	13.	To add an **Instructor** or **Location** not on the pull-down lists, or to add **Equipment** or **Materials**, click **Edit Resources**.	
Equipment is being used as an example. Any resources for the segment may be edited in this manner.	14.	Click the **Equipment** tab.	
	15.	Select the **Add one or more from list** link to add equipment to the Segment.	
	16.	On the **> Search** screen, enter the appropriate search criteria.	
	17.	Click **Search**.	
	18.	On the **Results** tab, select the check box corresponding to the equipment to be added.	
	19.	Click **Add** to add the equipment and return to the **Edit Equipment** screen.	
Changes can only be made to equipment added to the segment, not to equipment listed that is assigned to the location.	20.	Make the appropriate changes to the Segment's equipment.	
	21.	Click **Apply Changes**.	

Notes

Edit a Scheduled Offering Segment

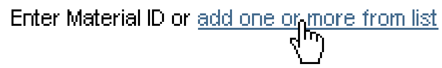
Step **Activity** **View**

> An example of this might be:
> The entire Scheduled Offering (all Segments) may need three-ring binders, but Segment two may be the only Segment requiring a specific handout. So the binders would be assigned to the Scheduled Offering and the handout to Segment two.

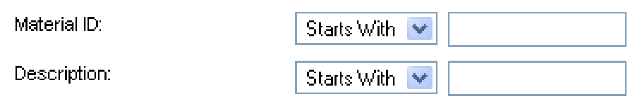
22. Click the **Materials** tab.

Note: Select materials specific to this Segment. Select materials applicable to the Scheduled Offering via the **Segments** tab of the corresponding Scheduled Offering.

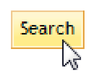
23. Select the **Add one or more from list** link to add materials to the Segment.



24. On the **> Search** screen, enter the appropriate search criteria.

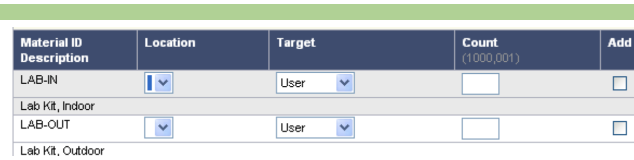


25. Click **Search**.



> Select the Location and Target from their respective drop-down lists and enter the number of each material in the Count field.

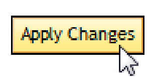
26. On the **Results** tab, select the check box corresponding to the materials to be added.



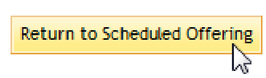
27. Click **Add** to add the materials and return to the **Edit Materials** screen.

28. Make the appropriate changes to the Segment's materials.

29. Click **Apply Changes**.



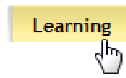
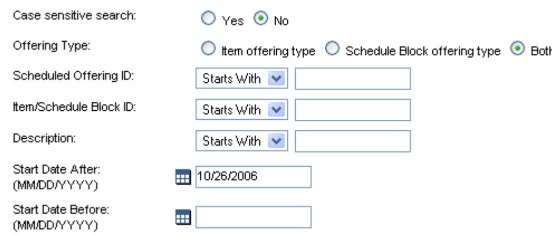
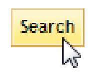
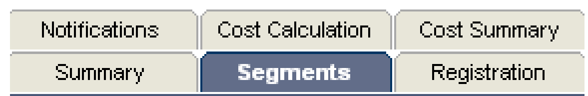
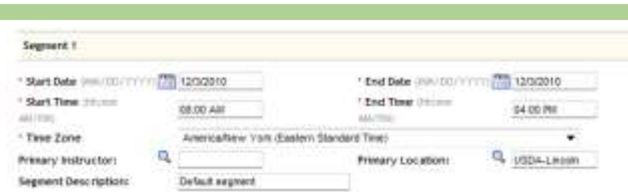
30. Click **Return to Scheduled Offering** to view all Segments.



Notes

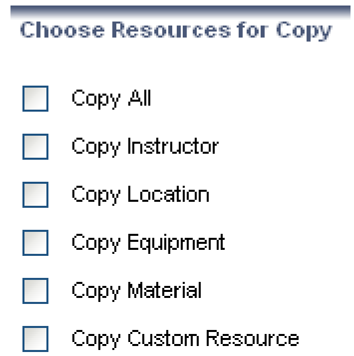
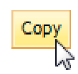
If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

Copy Resources to Other Scheduled Offering Segments

Step	Activity	View
1.	Select the **Learning** menu.	
2.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
3.	Click **Search**.	
4.	Locate the desired Scheduled Offering and click the **Edit** icon.	
5.	Click the **Segments** tab.	
6.	Scroll down to the **Update the Segments for the Scheduled Offering** section.	
7.	Locate the Segment containing resources to copy. **Note**: **Resources** refers to instructor, location, equipment, material types, and costs.	
8.	Select **Copy Resources to All**.	

Notes

Copy Resources to Other Scheduled Offering Segments

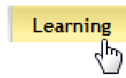
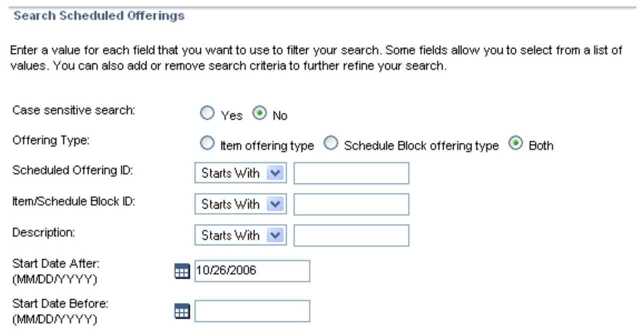
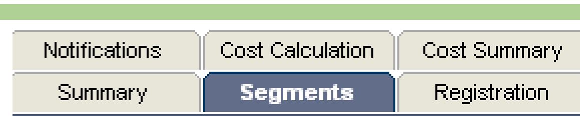
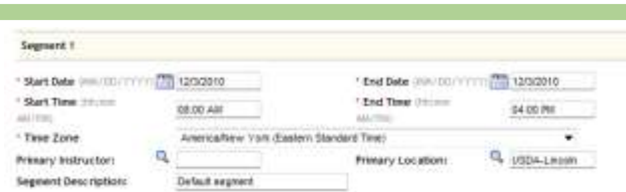
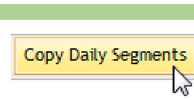
Step	Activity	View
9.	Select each check box corresponding to the individual resources to copy. **Note**: Select the **Copy All** check box to copy all Segment resources to the other Segments in this Scheduled Offering.	
10.	Select the **Check Conflicts** check box.	
11.	Click **Copy**.	

Tip: For an Item/course that requires several days to train, copy all the segments for an entire day and edit the segments rather than add or copy individual segments. See the next subtask, **Copy Daily Segments of a Scheduled Offering**.

Notes

For an Item/course that requires several days to train, it may be useful to copy all the segments for an entire day and edit the segments rather than add or copy individual segments.

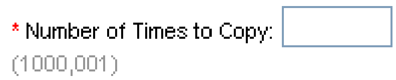
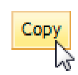
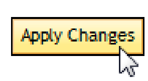
Copy Daily Segments of a Scheduled Offering

Step	Activity	View
1.	Select the **Learning** menu.	
2.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
3.	Click **Search**.	
4.	Locate the desired Scheduled Offering and click the **Edit** icon. **Tip**: Use **Ctrl+F** to quickly find a Scheduled Offering on the screen.	
5.	Click the **Segments** tab.	
6.	Scroll down to the **Update the Segments for the Scheduled Offering** section.	
7.	Locate the Segment comprising the date to copy.	
8.	Select the corresponding **Copy Daily Segments** button.	

Notes

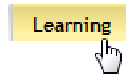
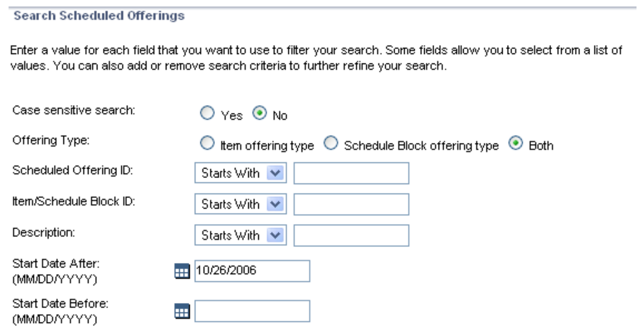
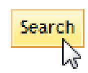
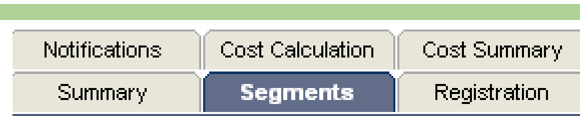
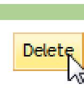
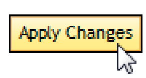
Inform students that this is a helpful feature for when there are items requiring several days to complete. Instead of creating new Segments to extend the schedule, simply duplicate a day and edit the date and time information as necessary while maintaining the resources.

Copy Daily Segments of a Scheduled Offering

Step	Activity	View
9.	On the **> Search > Search Results > Edit Segments > Copy Daily Segments** screen, enter the desired number of Segment duplications in the **Number of Times to Copy** field.	
10.	Select the **Check Conflicts** check box. **Note**: The default setting is to check for conflicts.	
11.	Select the **Send Notification** check box. **Note**: The default setting is to send notifications.	
12.	Click **Copy**.	
13.	Scroll down to the **Update the Segments for the Scheduled Offering** section.	
14.	Make the appropriate changes to the new Segments. **Note**: The start and end dates for are automatically set to the next day.	
15.	Click **Apply Changes**.	

Notes

Delete a Scheduled Offering Segment

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Select the Learning menu.</td><td>
</td></tr>
<tr><td>2.</td><td>On the > Search screen, enter the appropriate search criteria.
Note: See Managing Data Entry and Searches for more detailed information on searching.</td><td>
</td></tr>
<tr><td>3.</td><td>Click Search.</td><td>
</td></tr>
<tr><td>4.</td><td>Locate the desired Scheduled Offering and select the Edit icon.
Tip: Use Ctrl+F to quickly find a Scheduled Offering on the screen.</td><td>
</td></tr>
<tr><td>5.</td><td>Click the Segments tab.</td><td>
</td></tr>
<tr><td>6.</td><td>Scroll down to the Update the Segments for the Scheduled Offering section.</td><td>Update the Segments for the Scheduled Offering</td></tr>
<tr><td>7.</td><td>Select the Delete button for the segment to be removed.</td><td>
</td></tr>
<tr><td>8.</td><td>Click Apply Changes.</td><td>
</td></tr>
</table>

After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing Requests

A Request is a notification specifying that a User wants or needs to complete a specific Item. Usually the request is generated because a Scheduled Offering does not currently exist to accommodate the User's timeframe. A Request does not place a User in active registration or on the Waitlist for any specific Scheduled Offering. Current Item requests can also be viewed using the **Item Requests Report**. Subtasks pertaining to **Managing Requests** are accessible from the **Learning** menu. Request-specific subtasks include the following: **View**, **Add**, and **Edit a User Item Request**.

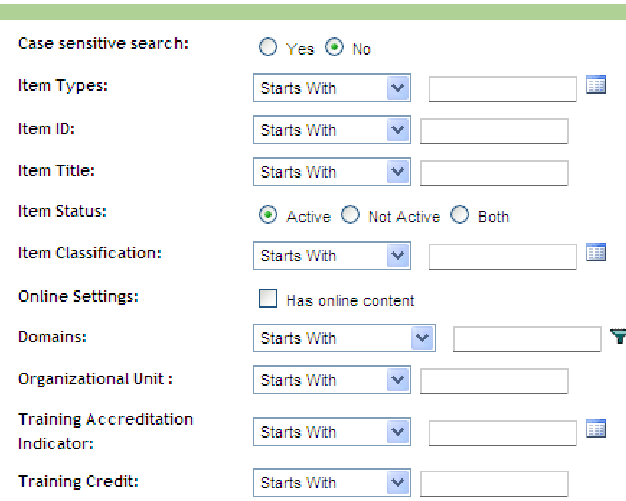
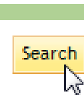
A Day-in-the-Life Scenario

You are planning to create an additional Scheduled Offering for the Item Internet Policies when there is sufficient need for it.

Notes

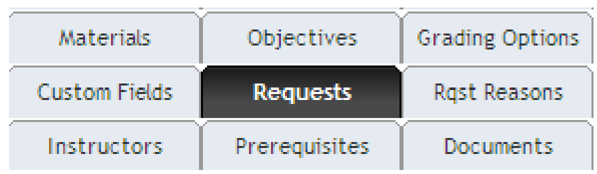
Remind students that complete definitions of terms are included in the glossary.

View a User Item Request

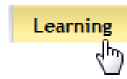
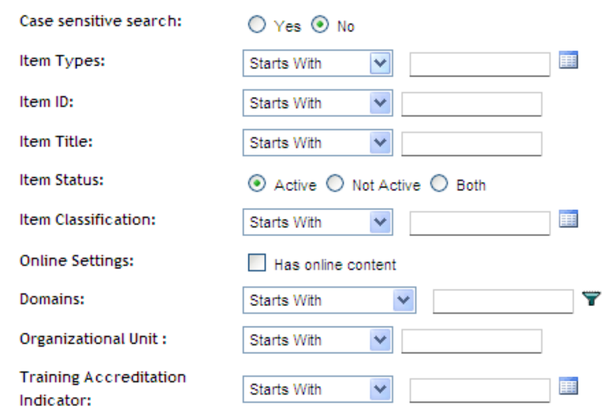
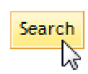
Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Items**.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	Locate the desired Item. **Tip**: Use **Ctrl+F** to quickly find a Learning Event.	

Notes

View a User Item Request

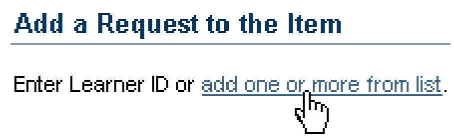
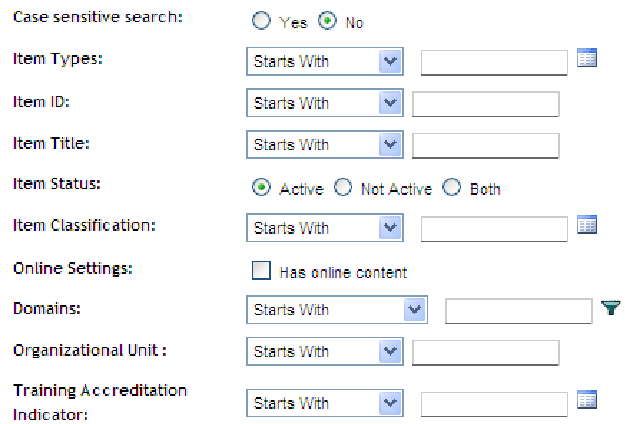
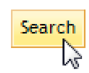
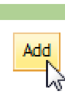
Step	Activity	View
6.	Select the **View** icon corresponding to the desired Item.	
7.	Click the **Requests** tab to view Users who have requested the Item.	

Add a User Item Request

Notes	Step	Activity	View
	1.	Select the **Learning** menu.	
	2.	Select **Items**.	
Remind students that complete definitions of terms are included in the glossary.	3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	4.	Click **Search**.	
	5.	Locate the desired Item. **Tip**: Use **Ctrl+F** to quickly find a Learning Event.	
	6.	Select the **Edit** icon corresponding to the desired Item.	
	7.	Click the **Requests** tab to view the list of Users requesting the Item.	

Notes

Add a User Item Request

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>8.</td><td>Select the Add one or more from list link to search for and enter a User.</td><td>
</td></tr>
<tr><td>9.</td><td>On the > Search screen, enter the appropriate search criteria.</td><td>
</td></tr>
<tr><td>10.</td><td>Click Search.</td><td>
</td></tr>
<tr><td>11.</td><td>On the Results tab, select the Add check box corresponding to each User to be added to the Item’s request list.
Note: Use the Request and Required Date calendar icons accordingly to make changes to the Requests.</td><td>
</td></tr>
<tr><td>12.</td><td>Click Add to add the selected User requests and return to the Requests tab.</td><td>
</td></tr>
</table>

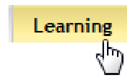
Note: Requests are usually entered here, but AgLearn can generate requests on its own. When a Scheduled Offering is cancelled, AgLearn will ask the administrator whether requests should be generated for Users that were registered or waitlisted for that Scheduled Offering. The second circumstance occurs when a Scheduled Offering with a Waitlist takes place. Requests can be generated for each User on the Waitlist via the Waitlist to Request automatic process.

Notes

Edit a User Item Request

Step | **Activity** | **View**

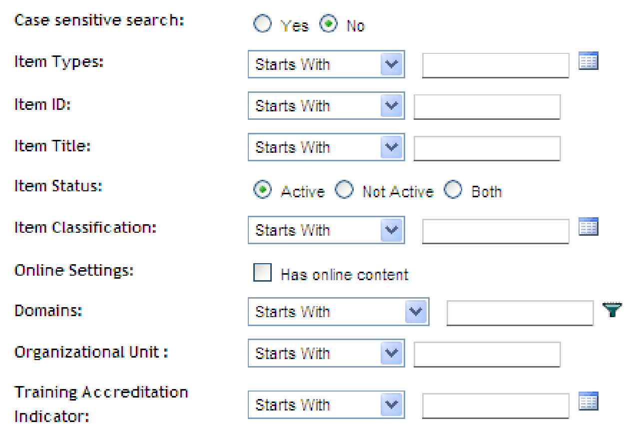
1. Select the **Learning** menu.



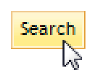
2. Select **Items**.

3. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



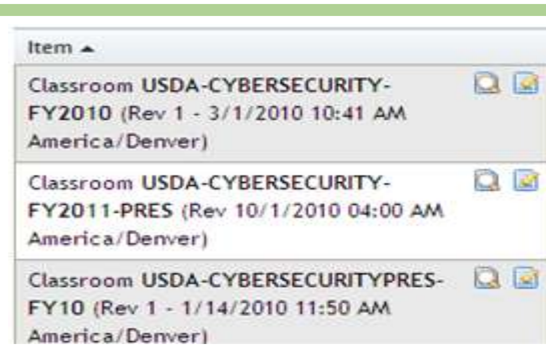
4. Click **Search**.



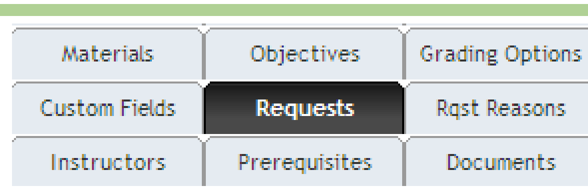
5. Locate the desired Item.

Tip: Use **Ctrl+F** to quickly find a Learning Event.

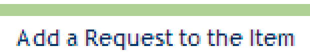
6. Select the **Edit** icon corresponding to the desired Item.



7. Click the **Requests** tab to view the list of Users requesting the Item.



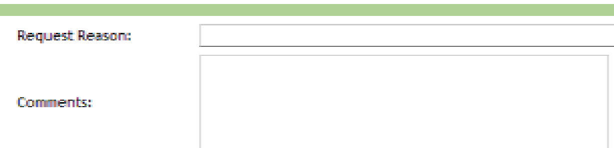
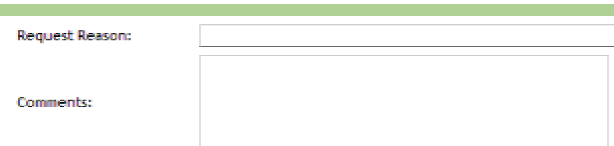
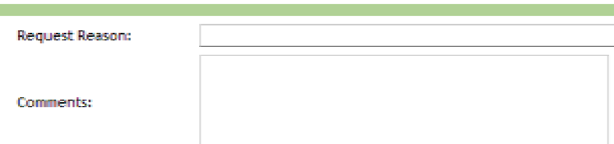
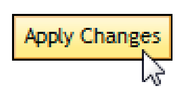
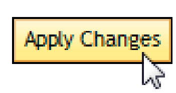
8. Scroll down to the **Add a Requests to the Item** section.



Notes

A comment can be entered by the User originating the Request, or by the administrator accessing it.

Edit a User Item Request

Step	Activity	View
9.	Click a User's **Request Date** calendar icon to change the existing request date.	
10.	Click a User's **Required Date** calendar icon to enter/change the existing required date.	
11.	Select the **Comments/Reason** link to edit or enter a comment or reason regarding the Request.	
12.	On the **> Search > Search Results > Edit Requests** screen, enter comments in the **Comments** field.	
13.	Enter or modify the reason for the User's request in the **Request Reason** field.	
14.	Click **Apply Changes**.	
15.	Select the **Remove** check box next to each User Request to be removed.	
16.	Click **Apply Changes**.	

Managing Slots

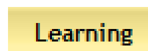
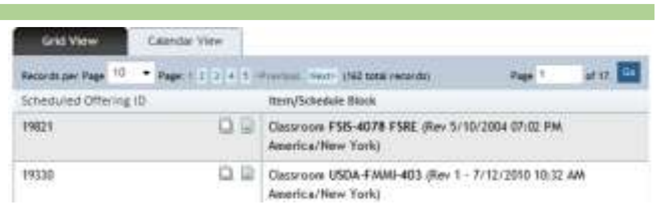
A Slot is a reservation made by an Organization for enrollments in a Scheduled Offering. Names of specific Users may not be available when an Organization acquires the Slots, but seats on the Scheduled Offering are reserved for that organization until the specific Users are identified. Slots are filled using the **Registration** tab within **Scheduled Offerings**. Subtasks pertaining to Slots are accessible via the **Scheduling** menu. Slot-specific subtasks include the following: **View**, **Add**, **Edit**, **Delete**, and **Fill a Slot**.

A Day-in-the-Life Scenario

AgLearn announced an additional Scheduled Offering for the Sexual Harassment Prevention course that must be completed by all employees hired after December 31st, 2010. The Scheduled Offering will occur in the Fall of 2011. A supervisor knows that he will be hiring 5 new employees.

Notes

View Scheduled Offering Slots

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Scheduled Offerings** from the left menu.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search.**	
5.	In the **Grid View**, locate the desired Scheduled Offering.	

Complete definitions of terms are included in the glossary.

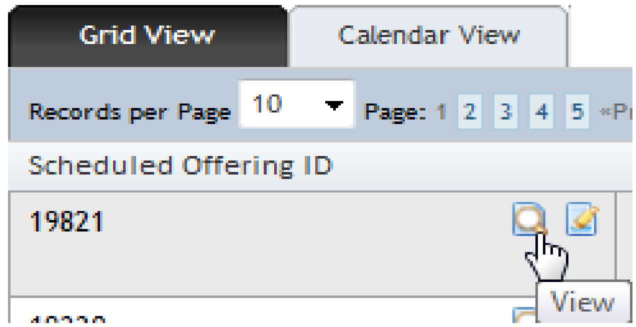
Notes

View Scheduled Offering Slots

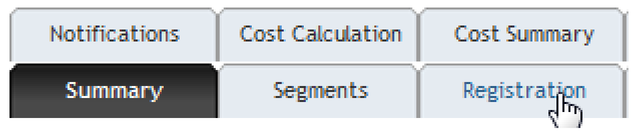
Step | **Activity** | **View**

6. Select the corresponding **View** icon to view more information.

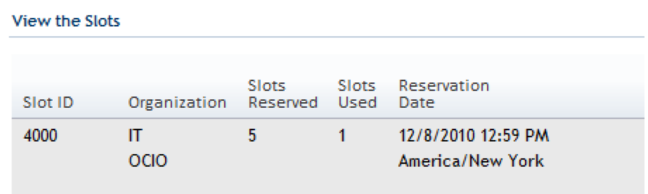
Note: A Scheduled Offering is also viewable by clicking the **Calendar View** tab on the **> Search** screen and then the desired **Offering ID** link to open the corresponding record.



7. Click the **Registration** tab.



8. Scroll down to the **View the Slots** section to view the Slots.

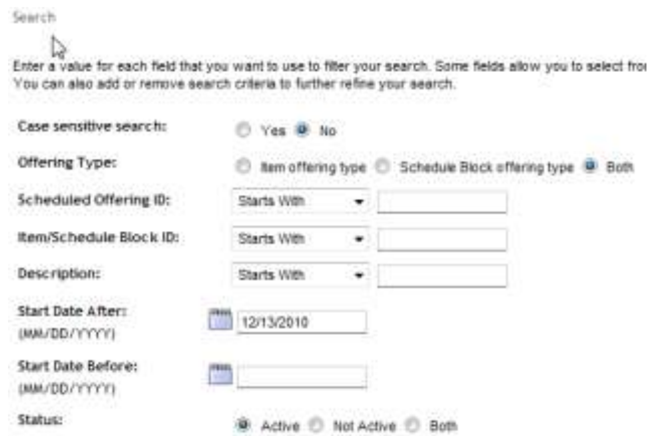
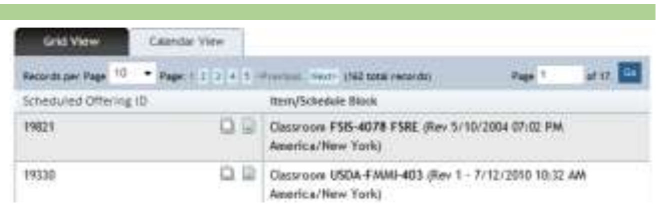
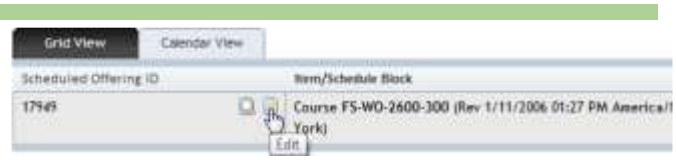
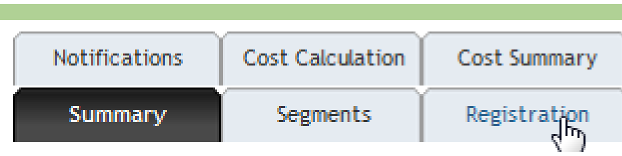


Tip: If a Scheduled Offering cannot be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

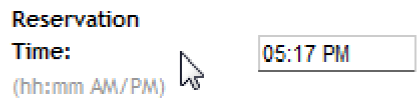
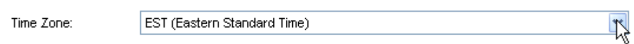
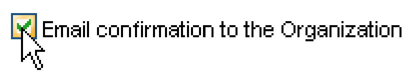
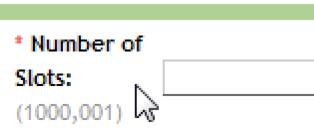
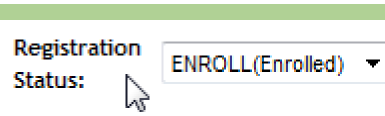
Notes

Inform students that they will be adding Slots to the newly created Scheduled Offering.

Add Slots to a Scheduled Offering

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Scheduled Offerings** from the left menu.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Search Results** screen, locate the desired Scheduled Offering. **Tip**: Use **Ctrl+F** to quickly find a Scheduled Offering.	
6.	Click the **Edit** icon corresponding to the desired Scheduled Offering.	
7.	Click the **Registration** tab.	
8.	Scroll down to the **Add Slots to the Scheduled Offering** section.	

Add Slots to a Scheduled Offering

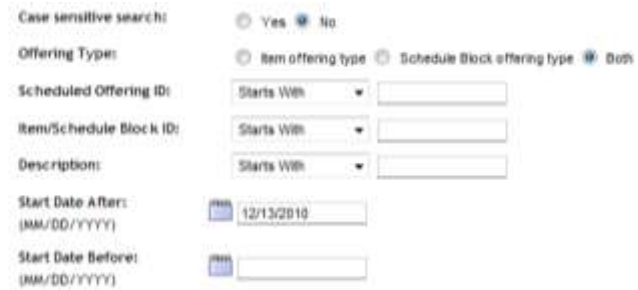
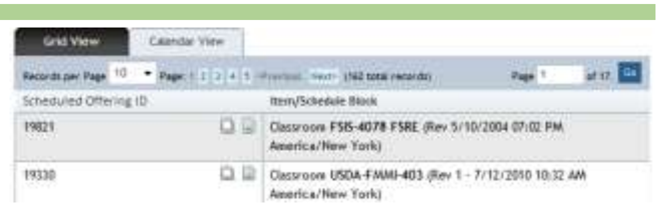
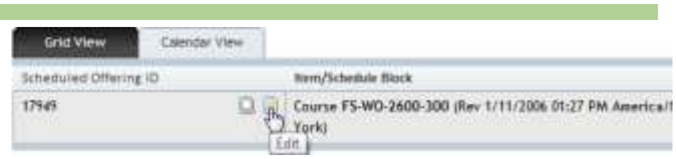
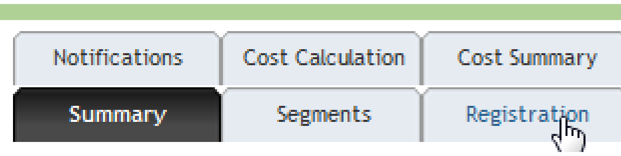
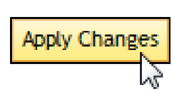
Step	Activity	View
9.	Click the **Organization ID** search icon to search for the Organization ID that will reserve Slots.	
10.	Click the **Reservation Date** calendar icon to select and enter a reservation date. **Note**: The Reservation Date field defaults to the current date.	
11.	Enter a reservation time in the **Reservation Time** field. **Note**: The **Reservation Time** field defaults to the current time.	
12.	Click the **Time Zone** selection icon to search for and enter a time zone. **Note**: The **Time Zone** field defaults to the time zone in which the Scheduled Offering occurs.	
13.	Select the **Email confirmation to the Organization** check box to send the Organization a confirmation message.	
14.	Enter the number of Slots reserved by the Organization in the **Number of Slots** field.	
15.	Select a registration status from the **Registration Status** drop-down list.	
16.	Click **Add**.	

Notes

Complete definitions of terms are included in the glossary.

Use Edit to change the number of reserved Slots.

Edit Scheduled Offering Slots

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Scheduled Offerings** from the left menu.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search.**	
5.	On the **Search Results** screen, locate the desired Scheduled Offering. **Tip**: Use **Ctrl+F** to quickly find a User.	
6.	Select **Edit** corresponding to the desired Scheduled Offering.	
7.	Click the **Registration** tab.	
8.	Scroll down to **Edit the Registered Users for the Scheduled Offering**.	Edit the Registered Users for the Scheduled Offering
9.	Make the appropriate changes.	
10.	Click **Apply Changes.**	

Notes

Complete definitions of terms are included in the glossary.

Delete Scheduled Offering Slots

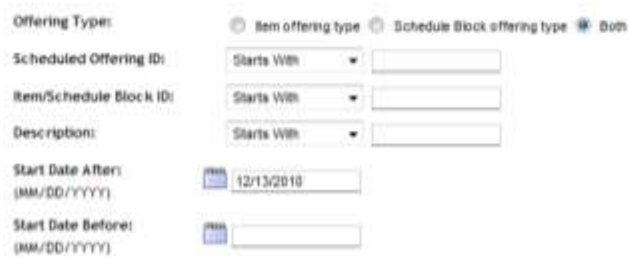
Step | **Activity** | **View**

1. Select the **Learning** menu.

2. Select **Scheduled Offerings** from the left menu.

3. On the **> Search** screen, enter the appropriate search criteria.

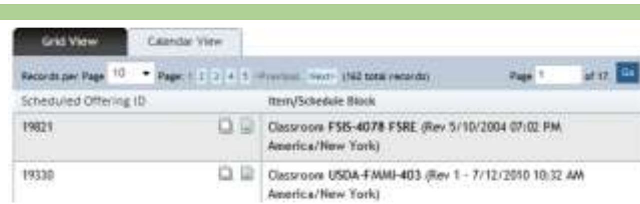
Note: See **Managing Data Entry and Searches** for more detailed information on searching.



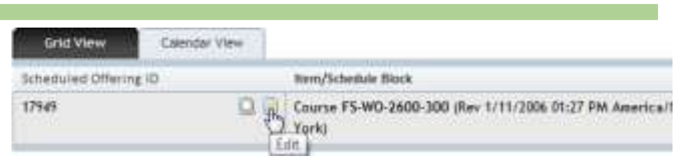
4. Click **Search**.

5. On the **Search Results** screen, locate the desired Scheduled Offering.

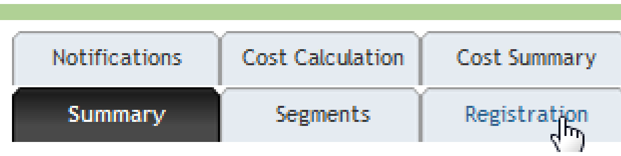
Tip: Use the **Ctrl+F** function to quickly find a User.



6. Click the **Edit** icon corresponding to the desired Scheduled Offering.



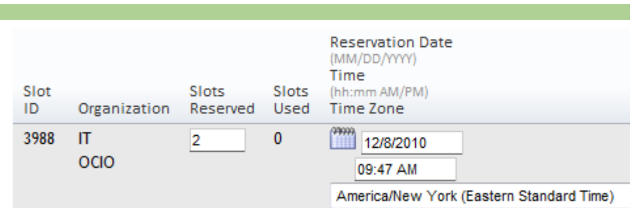
7. Click the **Registration** tab.



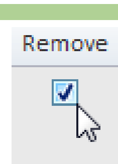
8. Scroll down to the **Edit the Slots for the Scheduled Offering** section.

Edit the Registered Users for the Scheduled Offering

9. Locate the desired **Slot**.



10. Select the **Remove** check box next to the desired Slot.



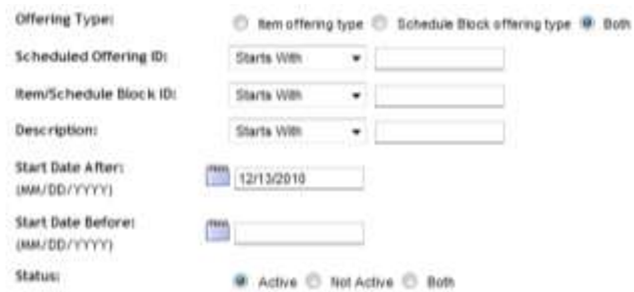
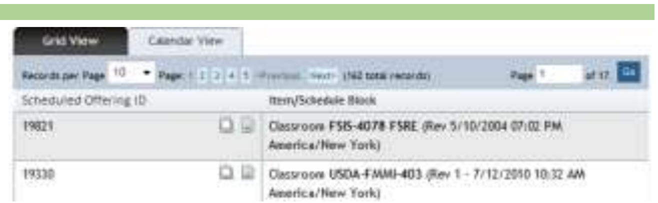
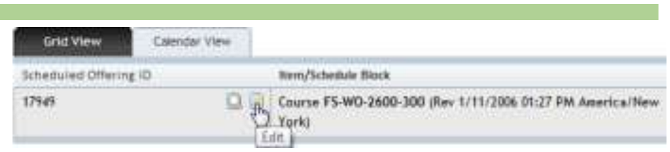
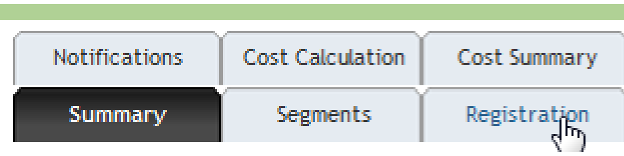
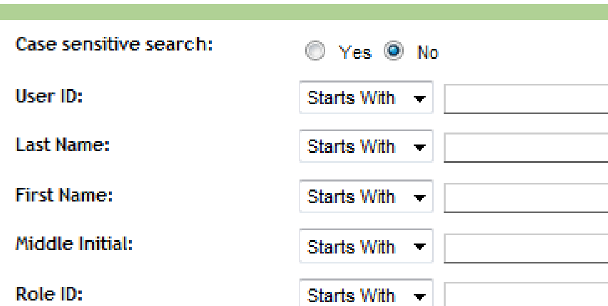
Notes

Delete Scheduled Offering Slots

Step	Activity	View
11.	Click **Apply Changes**.	

Notes

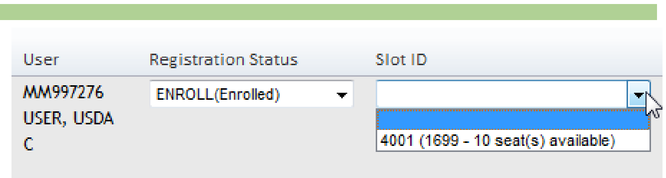
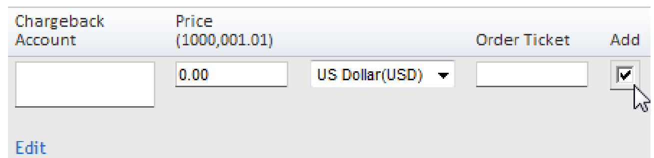
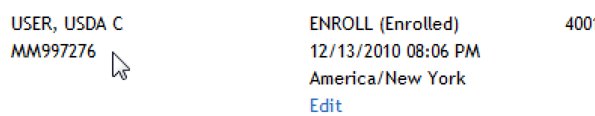
Fill a Slot

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Scheduled Offerings** from the left menu.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Search Results** screen, locate the desired Scheduled Offering. **Tip**: Use the **Ctrl+F** function to quickly find a Scheduled Offering.	
6.	Select the Scheduled Offering **Edit** link.	
7.	Click the **Registration** tab.	
8.	Select the **Add one or more from list** link to select a User.	
9.	On the **> Search** screen, enter the appropriate search criteria.	

Tell students they may need to scroll down to the section titled "Scheduled Offering Registration."

Notes

Fill a Slot

Step	Activity	View
10.	Click **Search**.	
11.	On the **Results** screen, locate the desired User(s).	
12.	Select a Slot to assign the User from the **Slot ID** drop-down list.	
13.	Select the User's corresponding **Add** check box.	
14.	Click **Add**.	
15.	On the **Registration** tab, scroll down to the **Edit the Registered Learners for the Scheduled Offering** section.	
16.	Locate the User(s) that were added to verify the Slot ID assignment.	

Managing Scheduled Offering Registrations

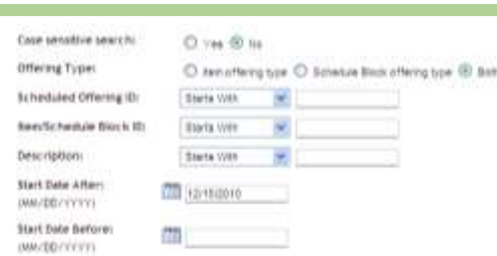
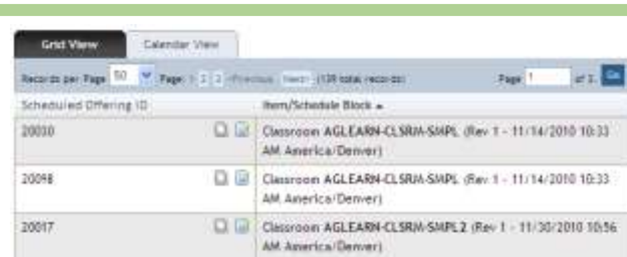
Registration is the act of placing a User's name on the planned list of participants in a specific Scheduled Offering. Subtasks pertaining to **Managing Scheduled Offering Registrations** are accessible from the **Scheduling** menu. Registration-specific subtasks include the following: **Register/Withdraw a User**, **View a Scheduled Offering Registration**, **Edit Registered Users for a Scheduled Offering**, **Create a Class Roster Registration Report**, and **Use the Registration Assistant Tool** to **Register a User for a Scheduled Offering**, and **Reserve Slots for a Scheduled Offering**.

A Day-in-the-Life Scenario

You are asked to determine which User is Waitlisted for a particular Scheduled Offering. Additionally, you must identify all Users who are Waitlisted for all Scheduled Offerings of a certain Item.

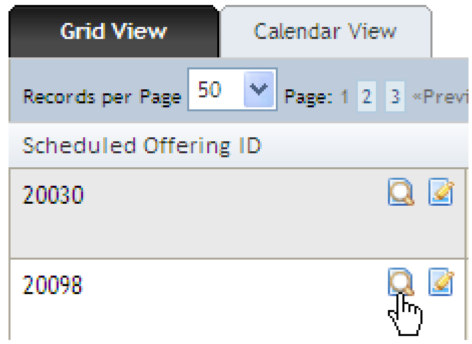
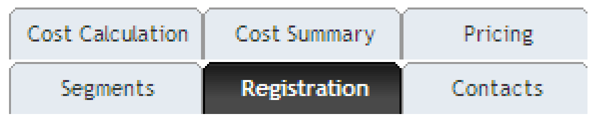
Notes

View a Scheduled Offering Registration

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Scheduled Offerings** from the left menu.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Grid View** screen, locate the desired Scheduled Offering. **Tip**: Use the **Ctrl+F** function to quickly find an Offering ID.	

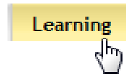
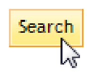
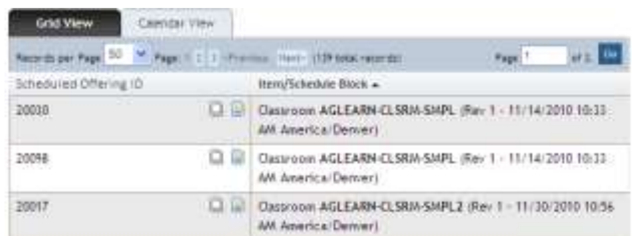
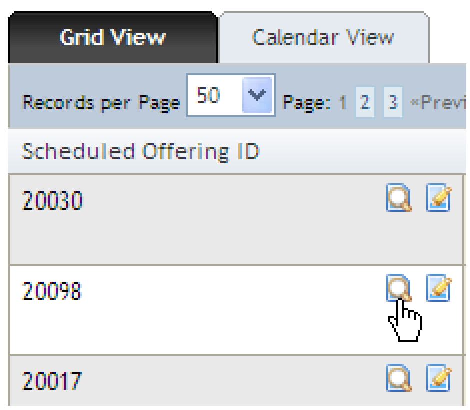
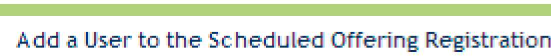
Notes

View a Scheduled Offering Registration

Step	Activity	View
6.	Click the **View** icon corresponding to the desired Scheduled Offering. **Note**: A User's registration is also viewable via **User Management > Users > Registration**.	
7.	Click the **Registration** tab.	
8.	Scroll down to the **Registered Users** section to verify/view the current student User registrations.	

Notes

Register a User in a Scheduled Offering

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Scheduled Offerings** from the left menu.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Grid View** screen, locate the desired **Scheduled Offering**. **Tip**: Use the **Ctrl+F** function to quickly find a User.	
6.	Click the **Edit** icon corresponding to the desired Scheduled Offering.	
7.	Click the **Registration** tab.	
8.	Scroll down to the **Add a User to the Scheduled Offering Registration** section.	

If the Offering is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain.

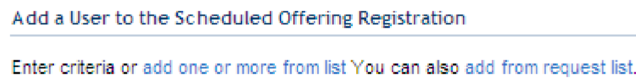
Notes

Register a User in a Scheduled Offering

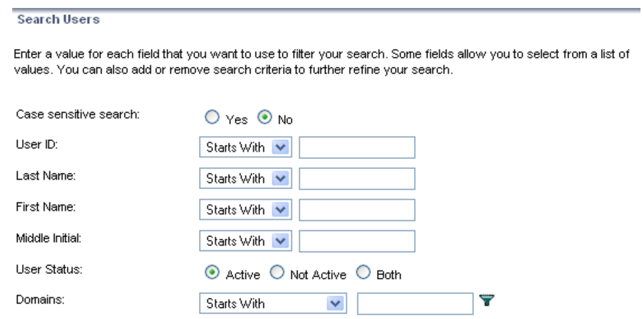
Step	Activity	View

9. Select the **Add one or more from list** link or the **Add from request list** link to search for and enter Users.

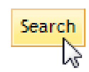
Notes: A request list is a list of Users who have requested to attend the Scheduled Offering.



10. On the **> Search** screen, enter the appropriate search criteria.

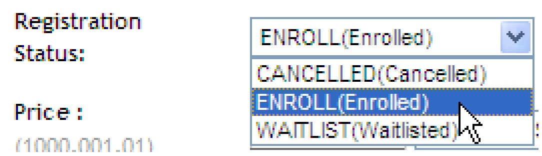


11. Click **Search**.

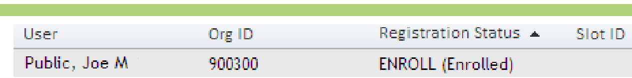


12. On the **Results** tab, select a registration status from the **Registration Status** drop-down list.

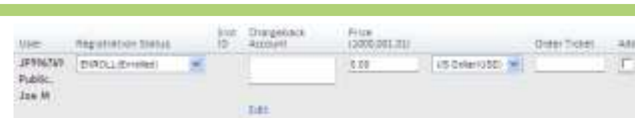
Notes: Mention to students that this is where they can assign a Learner to a Waitlist.



13. Select a slot, if appropriate, from the **Slot ID** drop-down list.



14. Select the **Add** check box for each User to be registered to the Scheduled Offering.



15. Select the applicable **Email confirmation to User**, **Instructor**, **Supervisor**, and/or **Contacts** check boxes at the bottom of the User list.

Notes: Inform students that after clicking the **Add** button it is unnecessary to click **the Apply Changes** button in the **Edit the Registered Learners for the Scheduled Offering** section of the **Registration** tab. At this point they should validate the registered Learners.

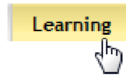
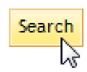
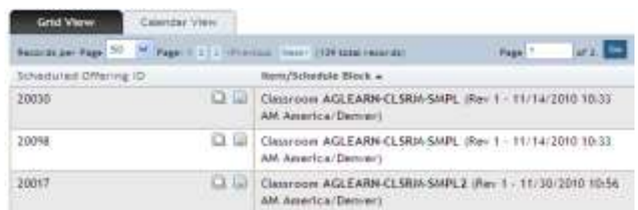
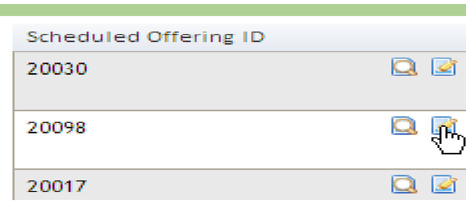
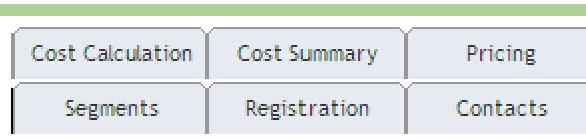
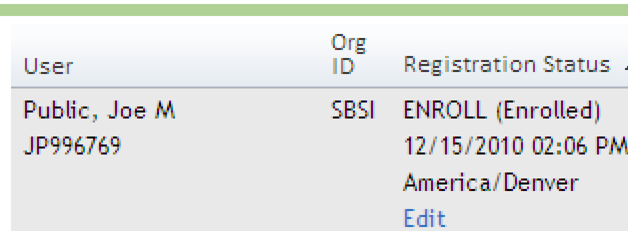
16. Click **Add**.

Note: Be sure to scroll down to the bottom of the screen to verify the addition.

Notes

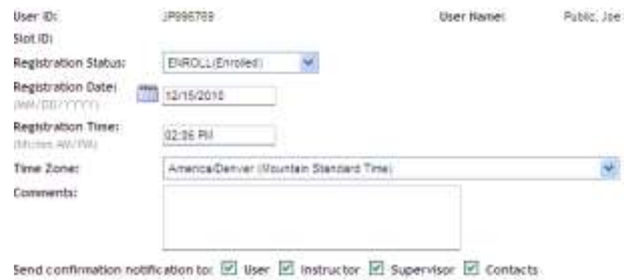
If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain.

Edit Registered Users for a Scheduled Offering

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Scheduled Offerings** from the left menu.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Grid View** screen, locate the desired Scheduled Offering. **Tip**: Use the **Ctrl+F** function to quickly find a User.	
6.	Click the **Edit** icon corresponding to the desired Scheduled Offering.	
7.	Click the **Registration** tab.	
8.	Scroll down to the **Edit the Registered Users for the Scheduled Offering** section.	
9.	Select a User's corresponding **Edit** link to make edits to the User's registration information. **Note**: Edits can only be made to one User's registration at a time.	

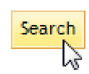
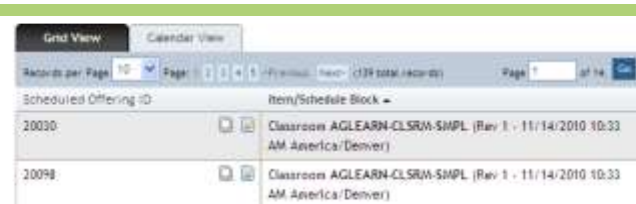
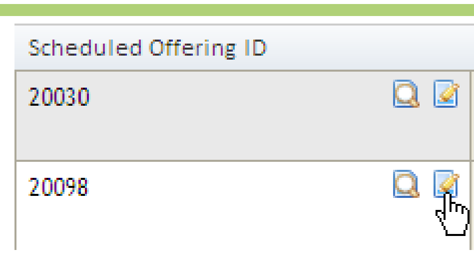
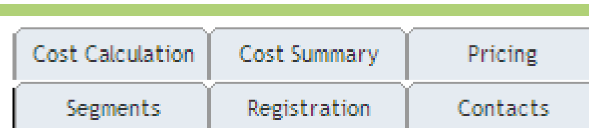
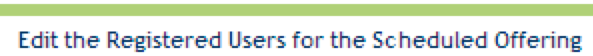
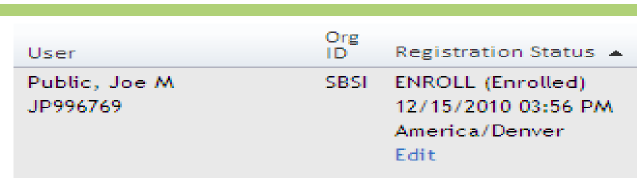
Notes

Edit Registered Users for a Scheduled Offering

Step	Activity	View
10.	Make the appropriate changes to the User's registration information for the Scheduled Offering.	
11.	Select the **Send Confirmation Notification to User** check box to provide Users with a confirmation. **Note**: Select the **Instructors**, **Supervisors**, and **Contacts** check boxes accordingly to provide them with confirmations.	
12.	Click **Apply Changes**.	

Notes

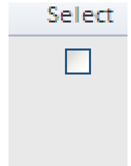
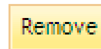
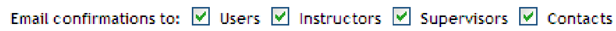
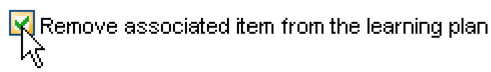
Withdraw a User from a Scheduled Offering

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Scheduled Offerings** from the left menu.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Results** screen, locate the desired Scheduled Offering. **Tip**: Use the **Ctrl+F** function to quickly find a Scheduled Offering.	
6.	Click the **Edit** icon corresponding to the desired Scheduled Offering.	
7.	Click the **Registration** tab.	
8.	Scroll down to the **Edit the Registered Users for the Scheduled Offering** section.	
9.	Locate the User to be removed (Withdrawn).	

If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain.

Notes

Withdraw a User from a Scheduled Offering

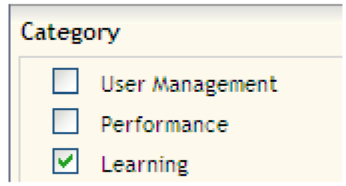
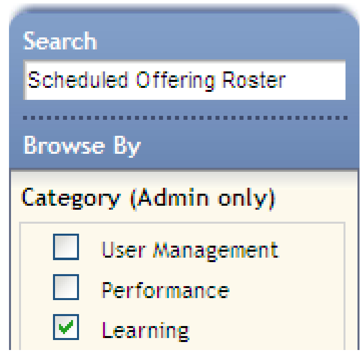
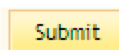
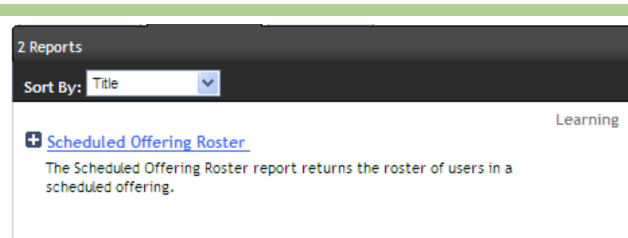
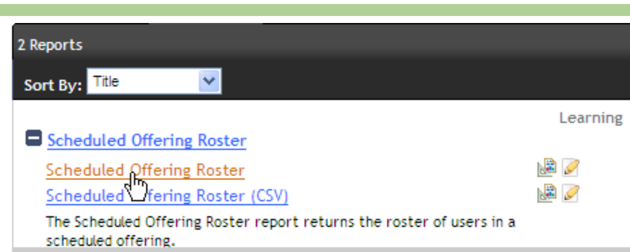
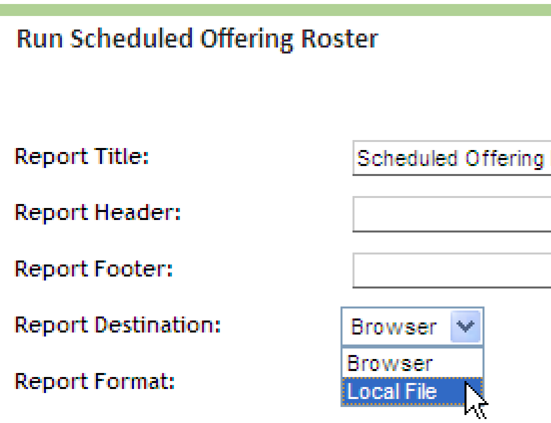
Step	Activity	View
10.	Select the **Select** check box next to the User to be removed (withdrawn) from the Scheduled Offering.	
11.	Click **Remove**.	
12.	Select the **Send Confirmation Notification to User** check box to provide Users with a confirmation. **Note**: Scroll down to the bottom of the list of names to select the **Instructors**, **Supervisors**, and **Contacts** you wish to also receive confirmations.	
13.	Select the **Remove associated item from the Learning Plan (To-Do List)** check box to remove the Item from the To-Do List.	
14.	Click **Apply Changes**.	

Notes

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

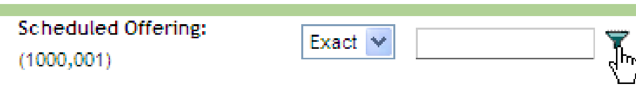
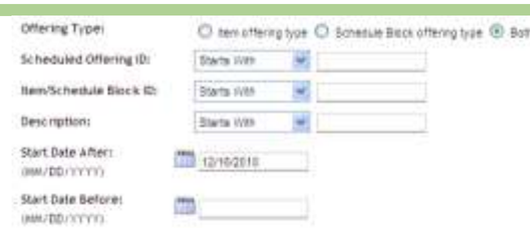
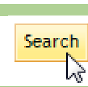
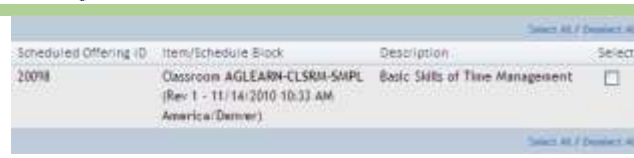
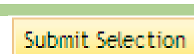
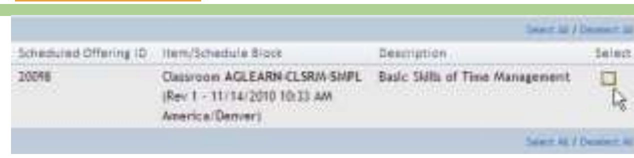
The Class Roster report displays each selected Scheduled Offering to include in the report and the instructor and Learners who have been scheduled for it.

Create a Scheduled Offering Registration Report

Step	Activity	View
1.	Select the **Reports** menu.	
2.	Select **Learning** from the left menu.	
3.	Enter the title of the report in the **Search** field.	
4.	Click **Submit**	
5.	Click the **+** icon to expand the list of available reports.	
6.	Select the report you wish to run. **Note:** The first report selection provides HTML or PDF output. The second selection provides CSV output only.	
7.	Select either the **Browser** or **Local File** option for your report destination. **Note**: **Browser** is the default selection; when selected, it displays the report within the browser. Selecting **Local File** saves the report to your hard drive to be opened at your convenience.	

Notes

Create a Scheduled Offering Registration Report

Step	Activity	View
8.	Select the **HTML** or **PDF** Report Format. Enter the Scheduled Offering number **Note**: The default format is HTML.	
9.	Enter the Scheduled Offering ID.	
10.	Select the **Mask User IDs** check box to mask a User's ID. **Note**: The default setting is for this check box to be selected so User IDs cannot be viewed on the report.	
11.	Select the **Filter** icon. The Scheduled Offering ID may be typed directly into the box, if known	
12.	Search for desired Scheduled Offering.	
13.	Click **Search**.	
14.	Click the **Select** check box corresponding to each Scheduled Offering for which a roster will be printed.	
15.	Click **Submit Selection**.	
16.	On the **View Filter** tab, select the **Remove** check box corresponding to any Scheduled Offering to be removed from the filter. Note: To add a Scheduled Offering to the filter on this tab, enter the Scheduled Offering ID in the Scheduled Offerings field and click Add.	

If students know the Scheduled Offering ID for which they want a roster, they can enter it directly into the **Scheduled Offerings** field. Multiple IDs should be separated with a comma.

Notes

Inform students they can click **Schedule Job** to specify a date and time to run the report as a background job or to click **Reset** to revert to system default.

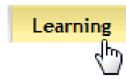
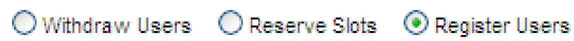
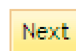
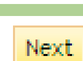
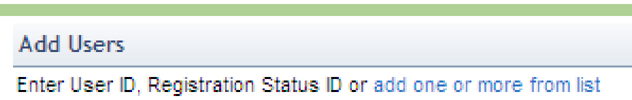
Create a Scheduled Offering Registration Report

Step	Activity	View
17.	Click **Submit Filter**.	
18.	Click **Run Report**.	

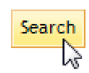
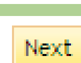
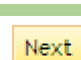
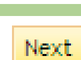
Notes

Inform students that the Registration Assistant tool is helpful for situations in which more than one Learner must be registered or unregistered.

Use the Registration Assistant Tool to Register a User for a Scheduled Offering

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Tools** from the left menu, then click the **+** sign to expand the menu.	
3.	Select **Registration Assistant**.	
4.	Select the **Register Users** option button. **Note**: This is the default selection.	
5.	Click **Next**.	
6.	Click the **Scheduled Offering** Search icon.	
7.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
8.	Click **Search**.	
9.	On the **Results** tab, select the **Select** link for the Scheduled Offering to be added and return to the **Step 2**: **Select Scheduled Offering** screen.	
10.	Click **Next**.	
11.	Select the **Add one or more from list** link to search for and enter Users.	

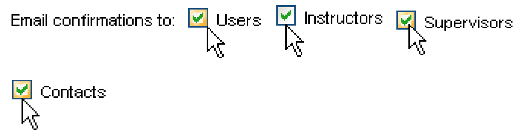
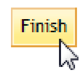
Use the Registration Assistant Tool to Register a User for a Scheduled Offering

Notes	Step	Activity	View
	12.	On the **> Search** screen, enter the appropriate search criteria.	
	13.	Click **Search**.	
The step is highlighted in yellow because the software screen does not display properly. The check box is misplaced.	14.	On the **Results** tab, select the **Add** check box next to each User to be added.	
	15.	Click **Add**.	
	16.	Scroll down to the **Edit Users** section.	
	17.	Remove Users as necessary by checking the appropriate **Remove** box.	
	18.	Click **Apply Changes**.	
	19.	Click **Next**.	
	20.	Enter additional comments/information pertaining to each User in the corresponding **Comments** field.	
	21.	Click **Next**.	
Inform students that for the purposes of this training cost is not being addressed and as such	22.	Click **Next** to skip the **Step 5**: **Edit Financial Data** screen.	

Notes

they should not make any changes to the **Step 5: Edit Financial Data** screen.

Use the Registration Assistant Tool to Register a User for a Scheduled Offering

Step	Activity	View
23.	Select the **Email confirmations to Users**, **Instructors**, **Supervisors**, and/or **Contacts** check boxes if it is applicable.	
24.	Click **Finish**.	
25.	Review the Scheduled Offering's registration status on the **Finish** screen.	

Tip: When using the Registration Assistant tool to withdraw a student, steps are similar to those above, with the exception of two elements:

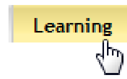
1. Select the **Withdraw** check box for those students to be withdrawn.
2. On the final step, select the **Remove associated item from the learning plan** check box to remove the Item from the User's To-Do List.

Notes

Use the Registration Assistant Tool to Reserve Slots for a Scheduled Offering

Step | Activity | View

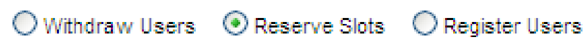
1. Select the **Learning** menu.



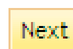
2. Select **Tools** from the left menu.

3. Select **Registration Assistant**.

4. Select the **Reserve Slots** option button.



5. Click **Next**.



6. Click the **Scheduled Offering** Search icon.

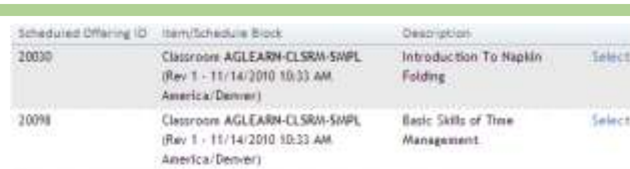
7. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.

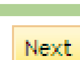
If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain.

8. Click **Search**.

9. On the **Results** screen, select the **Select** link for the Scheduled Offering to be added and return to the **Step 2**: **Select Scheduled Offering** screen.

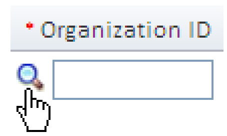
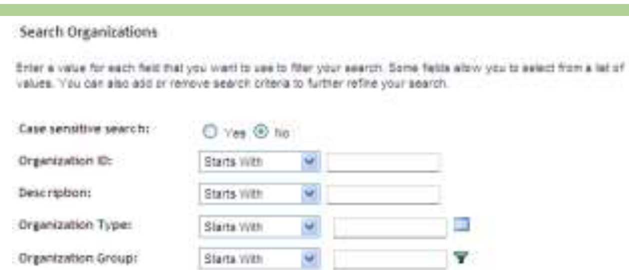
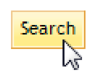
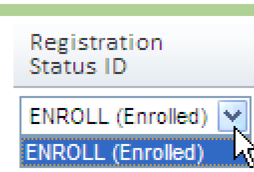
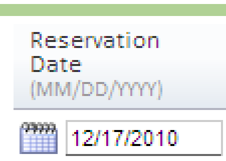
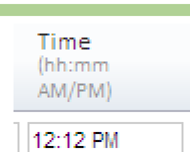
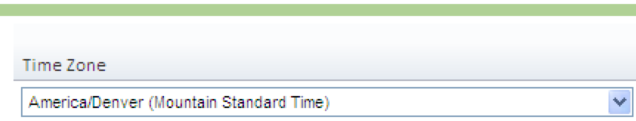


10. Click **Next**.



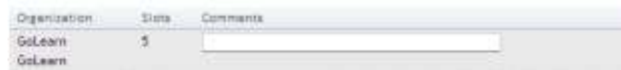
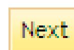
Notes

Use the Registration Assistant Tool to Reserve Slots for a Scheduled Offering

Notes	Step	Activity	View
	11.	Click the **Organization ID** Search icon to select and enter an Organization ID.	
	12.	On the **> Search** screen, enter the appropriate search criteria.	
	13.	Click **Search**.	
	14.	Select the **Select** link next to the Organization to be added.	
	15.	Enter the required number of slots in the **Slots** field.	
Remind students that they do not need to change the fields if the default field is accurate.	**16.**	Select a status from the **Registration Status** drop-down list. **Note**: The default is set to **Enrolled**.	
	17.	Click the **Calendar** icon to select and enter a Reservation date. **Note**: The default is set to the current date.	
Remind students that they do not need to change the fields if the default field is accurate	**18.**	Enter the reservation time in the **Time** field.	
	19.	Click the **Time Zone** Selection icon to select and enter a Time Zone.	

Notes

Use the Registration Assistant Tool to Reserve Slots for a Scheduled Offering

Step	Activity	View
20.	Click **Add**.	
21.	Click **Next**.	
22.	Enter additional comments/information about the Organization in the **Comments** field.	
23.	Click **Next**.	
24.	Click **Next** to skip the **Step 5**: **Edit Financial Data** screen.	
25.	Select the **Email confirmations to Organizations** check box if it is applicable to this Scheduled Offering registration.	
26.	Click **Finish**.	
27.	Review the Scheduled Offering's registration status on the **Finish** screen.	

Tip: To avoid data formatting errors use the Calendar and Selection icon assistants.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

Managing Curricula Records

A Curriculum is a grouping of learning. The Requirements, Subcurricula, Items, and Documents are grouped to make them easier to assign, track, and maintain.

Curricula management tasks are accessible from the **Learning > Curricula** menu.

Managing Curricula tasks include: **Creating Requirements**, **View**, **Add**, **Edit**, **Copy**, and **Delete a Curriculum Record**.

A Day-in-the-Life Scenario

> All new employees are required to take a series of learning events, including an orientation class, privacy basics, security literacy, and ethics and civil rights training. The easiest way to assign and track this is to create a curriculum containing all of the required Items and verify its completion.

Requirements

Requirements are intended to give the administrator, and the User, more flexibility. Now the User can choose several Items from a larger pool, or complete any number of Items from the pool, so long as a minimum number of contact hours (or credits) is met. The original parameters are set by the administrator; the User then makes specific choices to best suit his/her needs and preferences.

Requirements are assigned to Users through curricula. The administrator associates a requirement with a curriculum, and then assigns the curriculum to a User, thus providing an easy-to-use mechanism for the User to complete the requirement. Requirements can use period-based assignments, just as curricula could before, so that mandatory retraining intervals can be enforced.

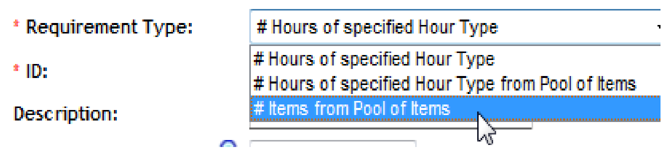
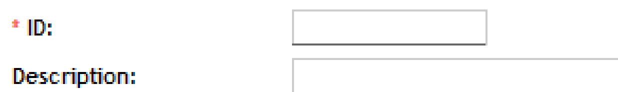
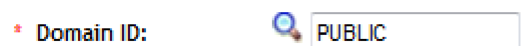
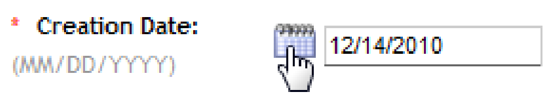
Space and time restrictions prohibit a comprehensive discussion of all the permutations possible with requirements. The fundamentals will be discussed here; more detailed information will be available in the online AgLearn Administrators' Reference.

There are three basic types of requirements. You may specify a number of Items from a pool, a number of hours or credits from a pool of Items, or just a number of hours or credits. Examples of each:

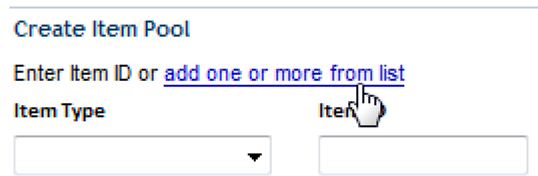
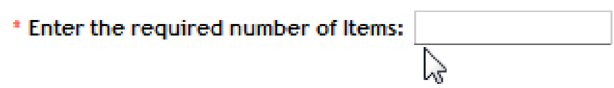
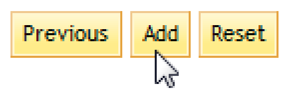
- Items from a pool of Items – The requirement may be for the User to complete any three from a pool of five Items (two from a pool of three, four of six, etc.). Ethics training, for example, requires the User to take three Items each year, from a pool of seventeen.
- Hours (or credits) from a pool of Items – The requirement may be to complete fifteen hours from a pool of Items; credits, or Continuing Professional Education units (CPE) may also be used. Some certifications require Users to attain a specified number of CPE units in their field each year to retain their certification.
- Hours (or credits) from any Items – An agency or organization may require any or all of its employees to complete forty hours a year of training, regardless of the discipline or subject.

Like many things in AgLearn, creating requirements is not difficult, but it has to be done correctly. Below are the steps required to create each of the three major requirements.

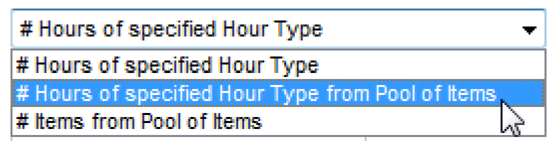
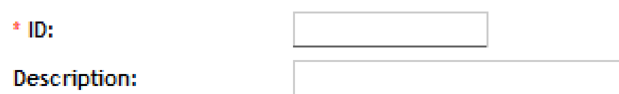
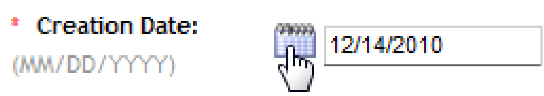
Creating a New Requirement: Items from a Pool of Items

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Requirements**.	
3.	Select **Add New**.	
4.	In the **Add New Requirement** module, go to the **Requirement Type** drop-down list and choose **# Items from Pool of Items**.	
5.	Type an **ID** and **Description** for the requirement.	
6.	Type a **Domain ID** or search for one by clicking the Search icon.	
7.	Accept the default **Creation Date**, type a different date, or click the Calendar icon to select a date.	
8.	Uncheck the **Active** checkbox if you wish to make the requirement inactive. (Requirements are active upon creation by default.)	
9.	Type **Comments** if you wish.	
10.	Click **Next**.	

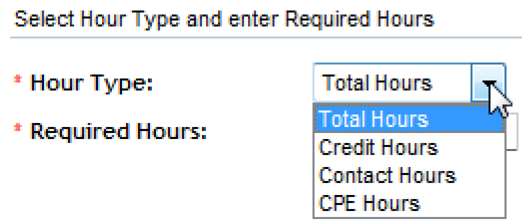
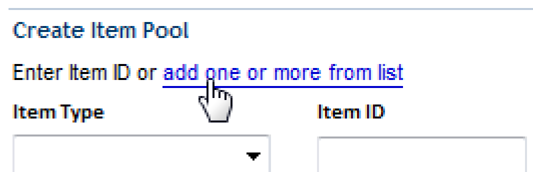
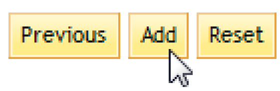
Creating a New Requirement: Items from a Pool of Items

Step	Activity	View
11.	Add Items to the **Item Pool** by clicking the **Add one or more from list** link. **Note**: The number of Items must be equal to or greater than the number entered into the **Required Number of Items** field in Step 12.	
12.	Click **Add** after each Item selected until you have all the Items needed for the pool.	
13.	Type the **Required Number of Items**. **Note**: The required number of Items must be equal to or greater than the number of Items in the pool.	
14.	Click the **Add** button nearest the top of the page.	

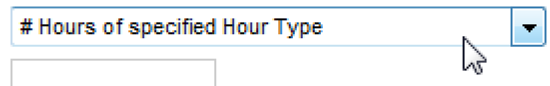
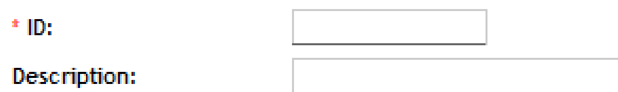
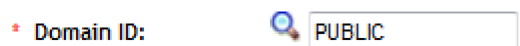
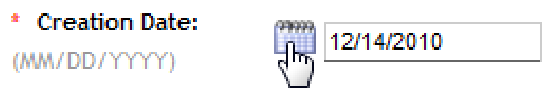
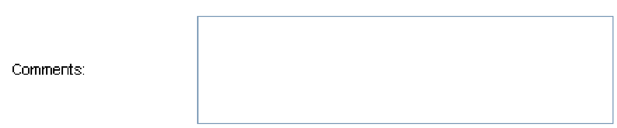
Creating a New Requirement: Hours of a Specified Type from a Pool of Items

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Requirements**.	
3.	Select **Add New**.	
4.	In the **Add New Requirement** module, go to the **Requirement Type** drop-down list and choose **# Hours of specified Hour Type from Pool of Items**.	
5.	Type an **ID** and **Description** for the requirement.	
6.	Type a **Domain ID** or search for one by clicking the Search icon .	
7.	Accept the default **Creation Date**, type a different date, or click the Calendar icon to select a date.	
8.	Uncheck the **Active** checkbox if you wish to make the requirement inactive. (Requirements are active upon creation by default.)	
9.	Type **Comments** if you wish.	
10.	Click **Next**.	

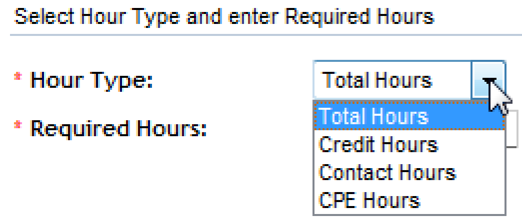
Creating a New Requirement: Hours of a Specified Type from a Pool of Items

Step	Activity	View
11.	Select the **Hour Type** from the drop-down list.	
12.	Enter the **Required Hours** (i.e., hours of the required type needed to fulfill the requirement).	
13.	Add at least one Item to the **Item Pool** by clicking the **Add one or more from list** link in the **Create Item Pool** module.	
14.	Click **Add** after each addition until you have the complete pool.	
15.	When all Items have been added, click the **Add** button nearest the top of the page.	

Creating a New Requirement: Hours of a Specified Hour Type

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Requirements**.	
3.	Select **Add New**.	
4.	In the **Add New Requirement** module, go to the **Requirement Type** drop-down list and choose **# Hours of specified Hour Type**.	
5.	Type an **ID** and **Description** for the requirement.	
6.	Type a **Domain ID** or search for one by clicking the Search icon .	
7.	Accept the default **Creation Date**, type a different date, or click the Calendar icon to select a date.	
8.	Uncheck the **Active** checkbox if you wish to make the requirement inactive. (Requirements are active upon creation by default.)	
9.	Type **Comments**, if you wish.	
10.	Click **Next**.	

Creating a New Requirement: Hours of a Specified Hour Type

Step	Activity	View
11.	Select the **Hour Type** from the drop-down list.	
12.	Enter the **Required Hours** (i.e., hours of the required type needed to fulfill the requirement).	
13.	Click the **Add** button.	

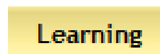
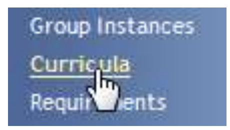
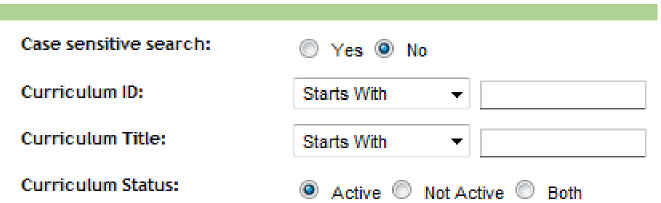
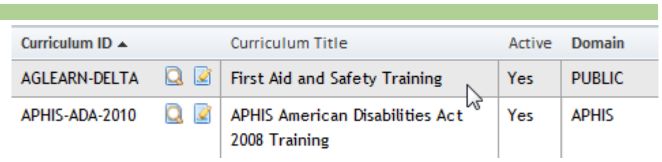
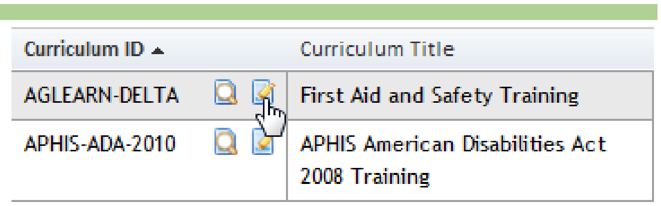
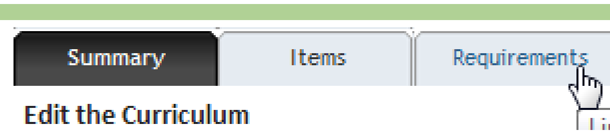
Requirement Grouping

Requirements can be assigned to a curriculum individually, in multiples, or in groups. When assigned individually, the requirement must be fulfilled for the curriculum to be considered complete. When multiple requirements are assigned to a curriculum, **all** requirements must be fulfilled for the curriculum to be considered complete.

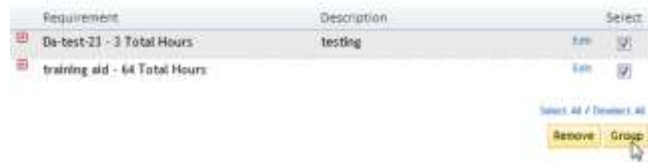
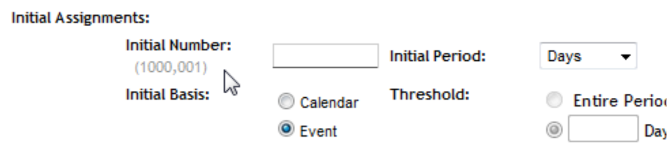
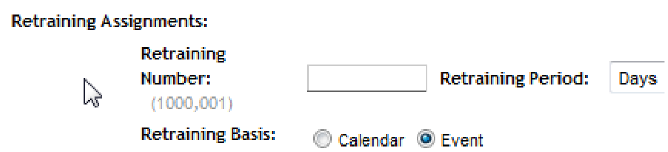
Requirement Groups allow administrators to assign multiple requirements to a curriculum, and leave it to the User to decide which requirement to fulfill to complete the curriculum.

For example, if a curriculum has two standalone requirements, A and B, the User must fulfill Requirement A *and* Requirement B for the curriculum to be completed. If Requirements A and B are grouped together, the User may fulfill either Requirement A *or* Requirement B to complete the curriculum.

Creating a Requirement Group

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Curricula**.	
3.	On the **> Search** screen, enter the appropriate search criteria.	
4.	Click **Search**.	
5.	On the **Results** tab, locate the desired Curriculum record. **Tip**: Use the **Ctrl+F** function to quickly find a Curriculum on the screen.	
6.	Click the **Edit** icon for the Curriculum.	
7.	Click the **Requirements** tab.	

Creating a Requirement Group

Step	Activity	View
8.	Find the requirements that you wish to group together and click the corresponding **Select** checkboxes.	
9.	Click the **Group** button.	
10.	Enter a **Group Description**.	
11.	(Optional) Enter an **Initial Number**, select an **Initial Period** from the drop-down list, and choose the **Initial Basis** (either Calendar or Event).	
12.	(Optional) Enter the **Retraining Number**, select a **Retraining Period** from the drop-down list, and choose the **Retraining Basis** (either Calendar or Event).	
13.	Click the Calendar icon to select an **Effective Date**.	
14.	Click **Create Group**.	
15.	The Group will appear in the **Update the Requirements for the Curriculum** section. Click the Expand icon to review the data and the Edit link to update it.	

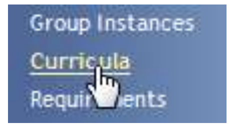
Notes

View a Curriculum Record

Step | **Activity** | **View**

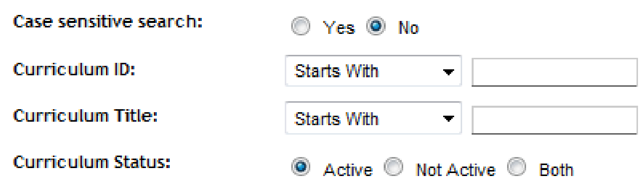
1. Select the **Learning** menu.

2. Select **Curricula**.



3. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.

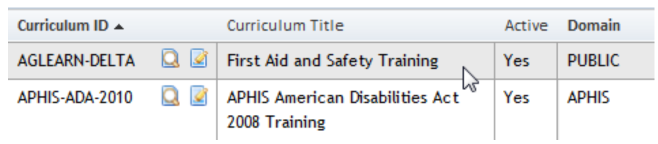


4. Click **Search**.

If the Curriculum is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain.

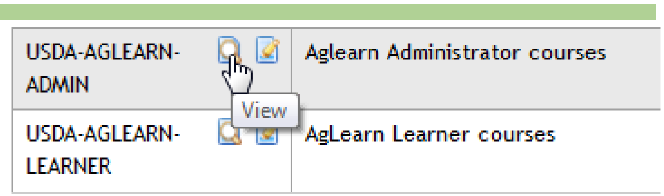
5. On the **Results** tab, locate the desired Curriculum record.

Tip: Use the **Ctrl+F** function to quickly find a Curriculum on the screen.



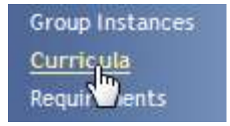
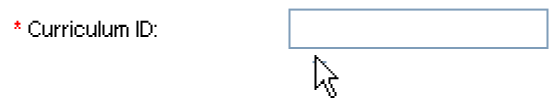
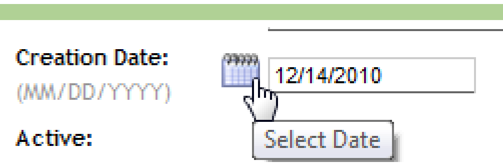
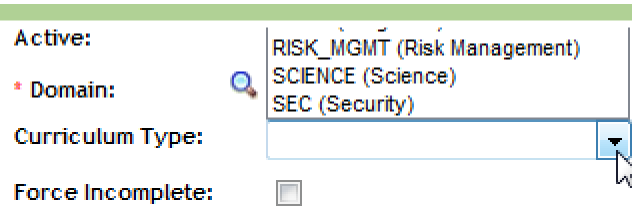
After selecting the **View** link, the **> Search > Search Results > View Summary** screen appears.

6. Select the corresponding **View** icon to view more information.



Notes

Add a New Curriculum

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Curricula**.	
3.	Select the **Add New** link.	
4.	Enter the curriculum ID in the **Curriculum ID** field. **Note**: Check with your agency lead for the proper AgLearn naming convention.	
5.	Enter a title for the new curriculum in the **Title** field.	
6.	Click the **Creation Date** Calendar icon to select and enter a creation date.	
7.	Select the **Active** check box if the Curriculum is active.	
8.	Click the **Domain** Search icon to search for and enter a domain. **Note**: **Domain** is a required field.	
9.	Click the **Curriculum Type** selection icon to search for and enter a curriculum type.	

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

Notes

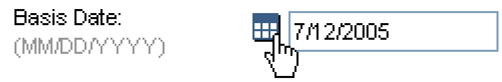
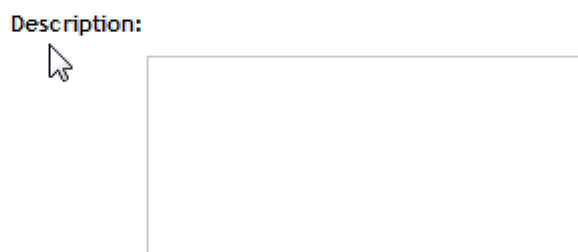
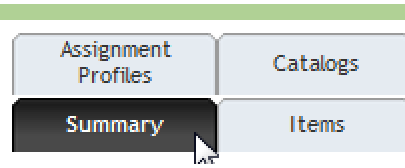
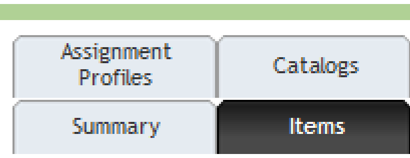
Inform students they can select the Help link to locate context sensitive help regarding field definitions on each screen.

If the User's latest attempt is incomplete, the system will calculate the expiration and required dates based on the date/time of the last unsuccessful attempt.

Caution: A Validation Error message will appear if all required fields are not complete.

After clicking the **Add** button, the **> Search > Search Results > Edit Summary** screen appears.

Add a New Curriculum

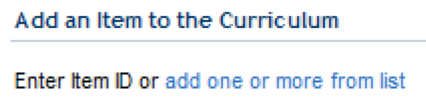
Step	Activity	View
10.	Click the Basis Date Calendar icon to select and enter a basis date. **Note**: The **Basis Date** defines the beginning point of the time periods which are built using the initial assignment information or the retraining assignment information.	
11.	Select the **Force Incomplete** check box to have the system calculate the Item's completion status based on the User's latest attempt at completing the Item.	
12.	Enter a curriculum description in the **Description** field.	
13.	Click **Add**.	
14.	Review and edit the information displayed on the **Summary** tab.	
15.	Click **Apply Changes**. **Caution**: Do not select a different tab prior to clicking **Apply Changes** or all changes and modifications will be lost.	
16.	Click the **Items** tab.	

Notes

Add a New Curriculum

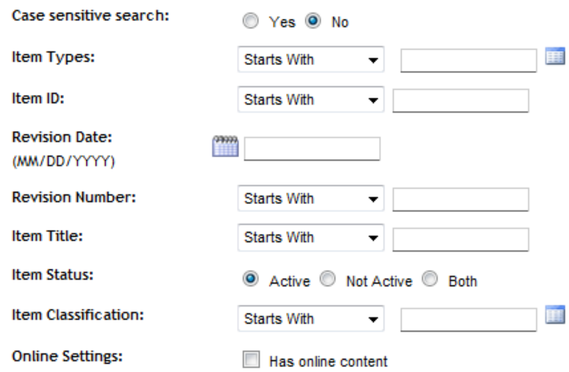
Step **Activity** **View**

17. Select the **Add one or more from list** link to search for and enter Items to the Curriculum.



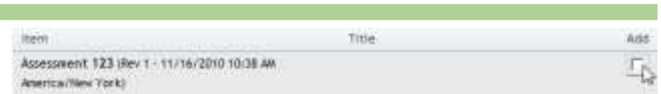
18. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



19. Click **Search**.

20. Select the corresponding **Add** check box for each Item to be added to the Curriculum.

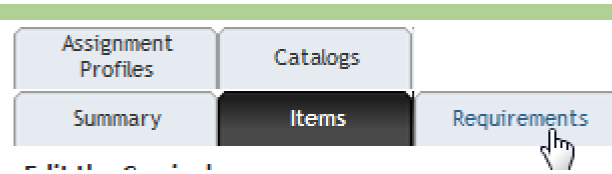


21. Click **Add**.

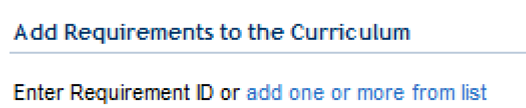
22. Review the added Items in the **Update the Items for the Curriculum** section.

Tip: To remove an Item from the Curriculum, select the corresponding **Remove** check box and click **Apply Changes**.

23. Select the **Requirements** tab.



24. Select the **Add one or more from list** link to search for and enter Requirements to the Curriculum.



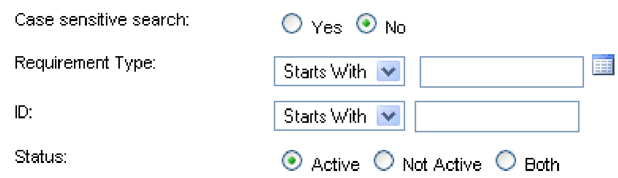
Notes

Add a New Curriculum

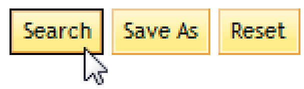
Step | **Activity** | **View**

25. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



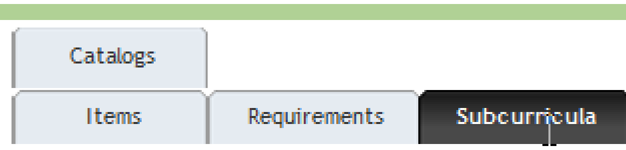
26. Click **Search**.



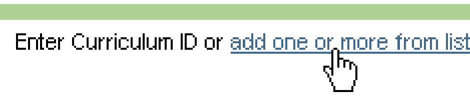
27. Select the corresponding **Add** check box for each Requirement to be added to the Curriculum.

28. Click **Add**.

29. Select the **Subcurricula** tab.



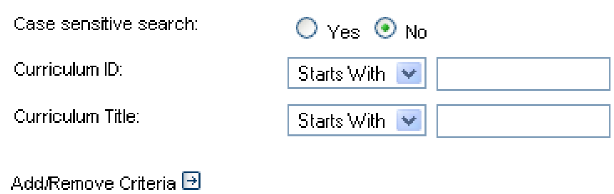
30. Select the **Add one or more from list** link to search for and enter Subcurricula into the Curriculum.



Curricula can stand alone or be part of another Curriculum as well. For example, CPR Training can be a stand-alone Curriculum or a Subcurriculum of other Curricula.

31. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



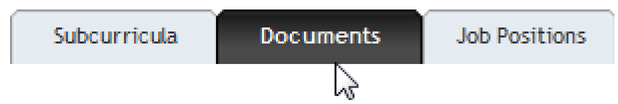
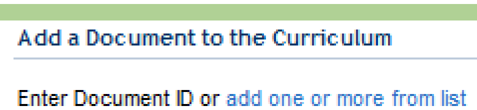
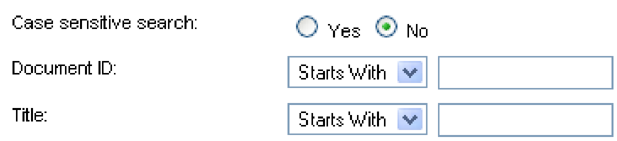
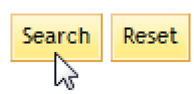
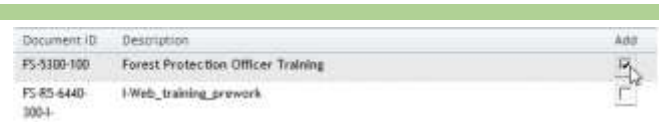
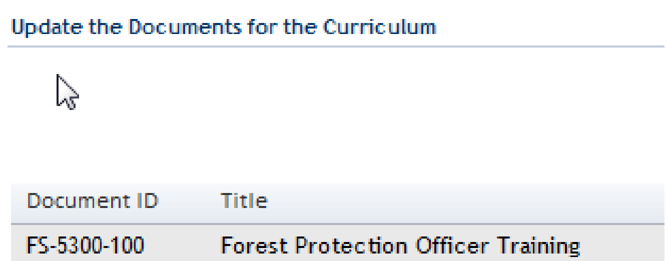
32. Click **Search**.

33. Select the corresponding **Add** check box for each Sub-curriculum to be added to the Curriculum.

34. Click **Add**.

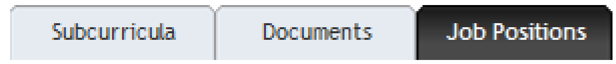
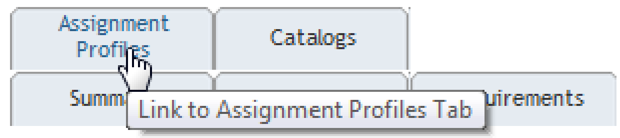
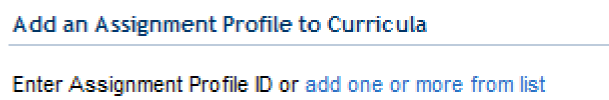
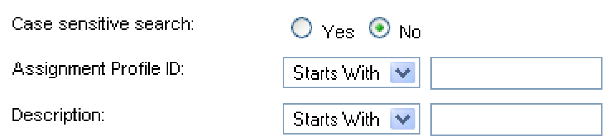
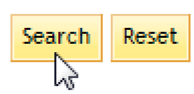
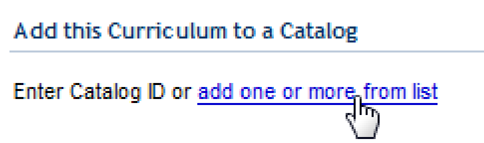
Notes

Add a New Curriculum

Step	Activity	View
35.	Scroll down to the **Update the Subcurricula for the Curriculum** section to review the add Curriculum. **Tip**: To remove a Subcurriculum from the Curriculum, select the corresponding **Remove** check box and click **Apply Changes**.	
36.	Select the **Documents** tab.	
37.	Select the **Add one or more from list** link to search for and enter documents into the **Document ID** field.	
38.	On the **> Search** screen, enter the appropriate search criteria. Note: See Managing Data Entry and Searches for more detailed information on searching.	
39.	Click **Search**.	
40.	Select the corresponding **Add** check box for each Document to be added to the Curriculum.	
41.	Click **Add**.	
42.	Review the added Documents in the **Update the Documents for the Curriculum** section. **Tip**: To remove a Document from the curriculum, select the corresponding **Remove** check box.	

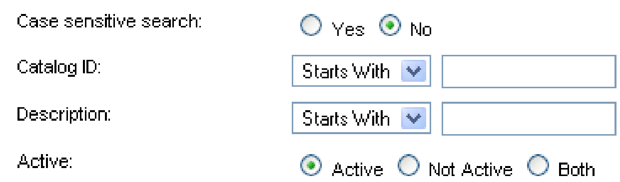
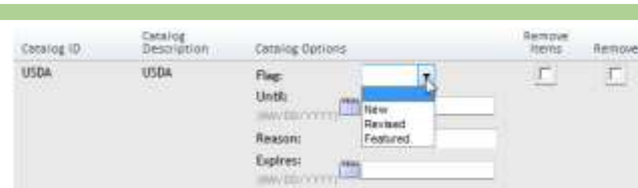
Notes

Add a New Curriculum

Step	Activity	View
43.	Select the **Job Positions** tab to view the Job Positions associated with a Curriculum record.	
44.	Select the **Assignment Profiles** tab.	
45.	Select the **Add one or more from list** link to search for and enter Assignment Profiles associated with the Curriculum.	
46.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
47.	Click **Search**.	
48.	Select the corresponding **Add** check box for each Assignment Profile to be added to the Curriculum.	
49.	Click **Add**.	
50.	Select the **Catalogs** tab.	
51.	Select the **Add one or more from list** link to search for and enter the Catalogs in which you would like for this Curriculum to appear.	

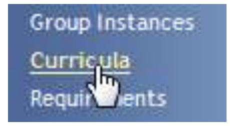
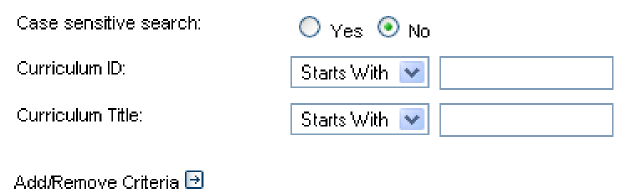
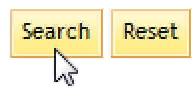
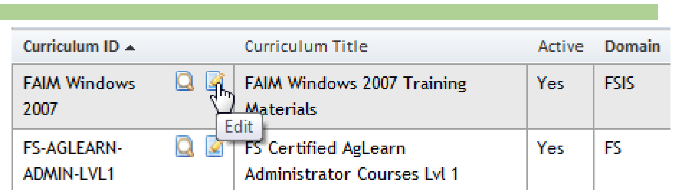
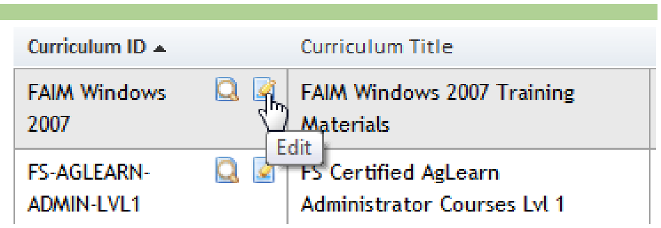
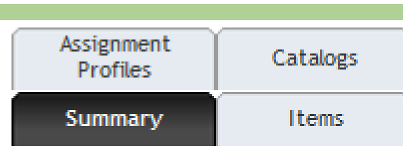
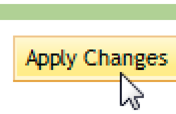
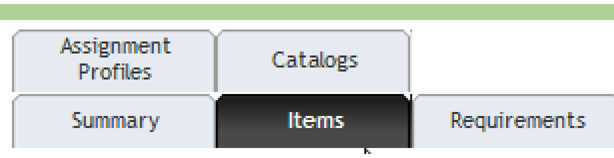
Notes

Add a New Curriculum

Step	Activity	View
52.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
53.	Click **Search**.	
54.	Select the corresponding **Add** check box for each Catalog to which the Curriculum should be added.	
55.	Click **Add**.	
56.	Designate **Flag** information, and enter an **Expiration Date**, if needed.	

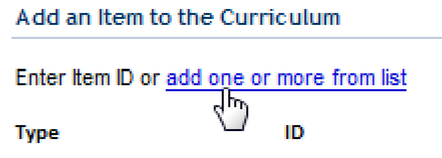
Notes

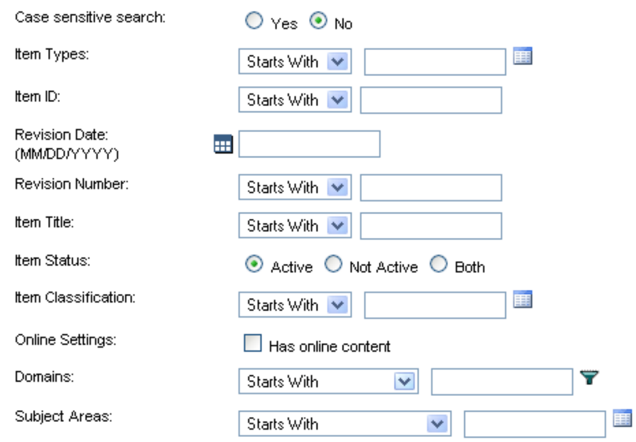
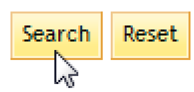
Edit a Curriculum Record

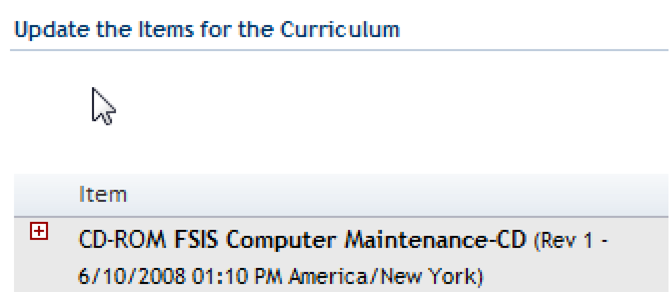
Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Curricula**.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Search Results** screen, locate the desired Curriculum Record. **Tip**: Use the **Ctrl+F** function to quickly find a Curriculum on the screen.	
6.	Select the corresponding **Edit** icon.	
7.	Make the appropriate changes to the information on the **Summary** tab. **Caution**: Do not select a different tab prior to clicking **Apply Changes** or all changes and modifications will be lost.	
8.	Click **Apply Changes**.	
9.	Select the **Items** tab.	

Notes

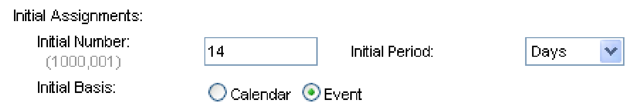
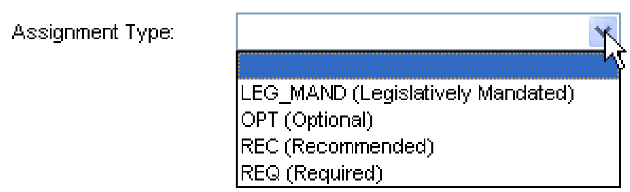
Edit a Curriculum Record

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>10.</td><td>Select the Add one or more from list link to search for and enter Items into the Curriculum record.</td><td>
</td></tr>
<tr><td>11.</td><td>On the > Search screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching.</td><td>
</td></tr>
<tr><td>12.</td><td>Click Search.</td><td>
</td></tr>
<tr><td>13.</td><td>On the Results screen, select the corresponding Add check box for each Item to be added to the Curriculum.</td><td>
</td></tr>
<tr><td>14.</td><td>Click Add.</td><td>
</td></tr>
<tr><td>15.</td><td>Review the added Items in the Update the Items for the Curriculum section.

Tip: To remove an Item from the curriculum, select the corresponding Remove check box.</td><td>
</td></tr>
<tr><td>16.</td><td>Select the Edit link of the Item to be edited.</td><td>
</td></tr>
</table>

Edit a Curriculum Record

Notes	Step	Activity	View
For example, if you want the learners to complete the item within 30 days, select Days from the Initial Period drop-down list and type 30 in the Initial Number text box.	**17.**	Enter the **Initial Assignments** data. **Note**: The values in these fields indicate how long, in days, weeks, etc., the Users has to complete this Item once it has been assigned.	
For example, if you want learners to retrain on the item within 2 months, select Months from the Initial Period drop-down list and type 2 in the Initial Number text box.	**18.**	Enter the **Retraining Assignments** data. **Note**: The values in these fields indicate how frequently, in days, weeks, etc., the User must be retrained on this Item.	
Tell students that when they create an Item, the default date is the current date; but they may decide to set it to a future date since the curriculum status of any Learner who is assigned the curricula to which they are adding this new Item would become “incomplete” as soon as the Item is Added. By making the effective date a future date, they are defining a “grace period” to allow Learners to complete the new Item in the time allotted, without losing their curriculum.	**19.**	Click the **Effective Date** Calendar icon to select and enter an effective date. **Note**: The effective date is the date when a new or revised Item will be used for the calculation of Item completion statuses and curriculum statuses.	
	20.	Click the **Assignment Type** Selection icon to search for and enter an assignment type.	
Tell students that for online Items the system will not prevent a Learner from taking the Items out of the scheduled order (i.e., the Learner can take the Items in any order).	**21.**	Enter a sequence number in the **Sequence Number** field. **Note**: A sequence number indicates the order in which the Items in the curriculum will be scheduled by the system. It is the order the User is expected to take the assigned Items in the curriculum.	

Notes

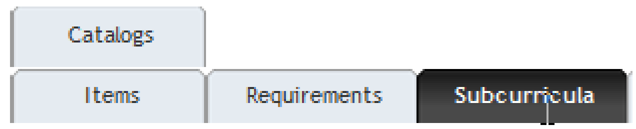
Edit a Curriculum Record

Step | **Activity** | **View**

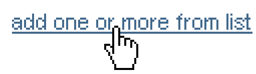
22. Click **Apply Changes**.

Caution: Do not select a different tab prior to clicking **Apply Changes** or all changes and modifications will be lost.

23. Select the **Subcurricula** tab.

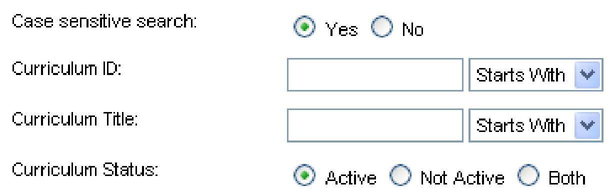


24. Select the **Add one or more from list** link to search for and enter Subcurricula into the Curriculum record.

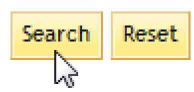


25. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



26. Click **Search**.



If a Subcurriculum is in an incorrect domain, a person with the right permissions will need to move it to the correct domain.

27. On the **Results** tab, select the corresponding **Add** check box for each Subcurriculum to be added to the Curriculum.

28. Click **Add**.

29. Review the added Subcurricula in the **Update the Subcurricula for the Curriculum** section.

Tip: To remove a Subcurriculum from the curriculum, select the corresponding **Remove** check box.

Notes

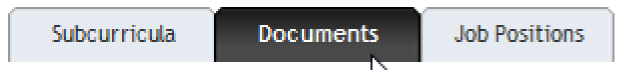
Edit a Curriculum Record

Step | **Activity** | **View**

30. Click **Apply Changes**.

Caution: Do not select a different tab prior to clicking **Apply Changes** or all changes and modifications will be lost.

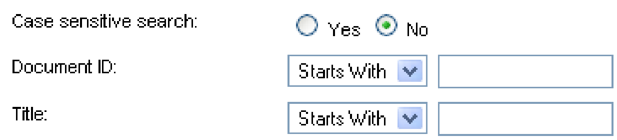
31. Select the **Documents** tab.



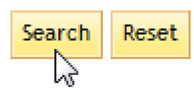
32. Select the **Add one or more from list** link to search for and enter Documents into the Curriculum record.

33. On the **> Search** screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching.

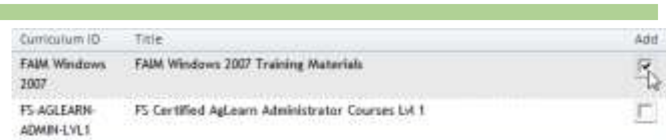


34. Click **Search**.



If a Document is in an incorrect domain, someone with the right permissions will need to move it to the correct domain.

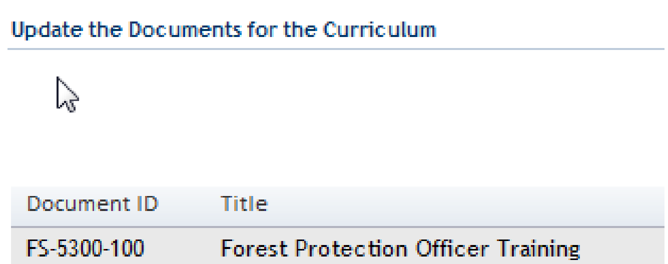
35. Select the corresponding **Add** check box for each Document to be added to the Curriculum.



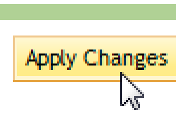
36. Click **Add**.

37. Review the added Documents in the **Update the Subcurricula for the Curriculum** section.

Tip: To remove a Document from the curriculum, select the corresponding **Remove** check box.



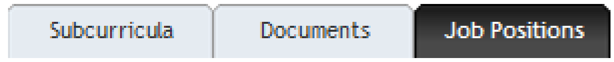
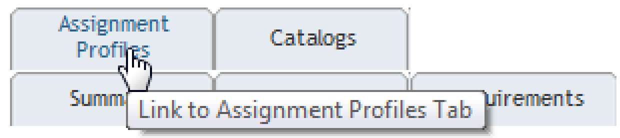
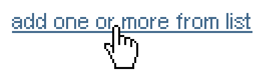
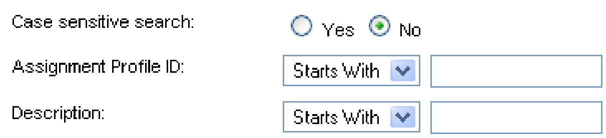
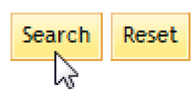
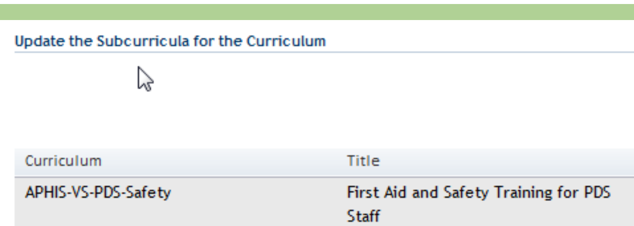
38. Click **Apply Changes**.



Notes

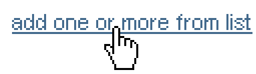
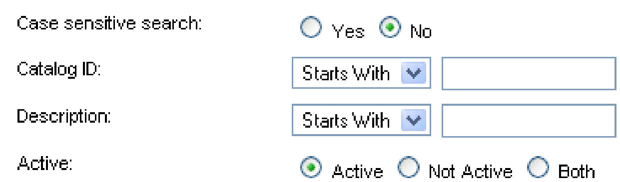
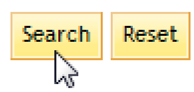
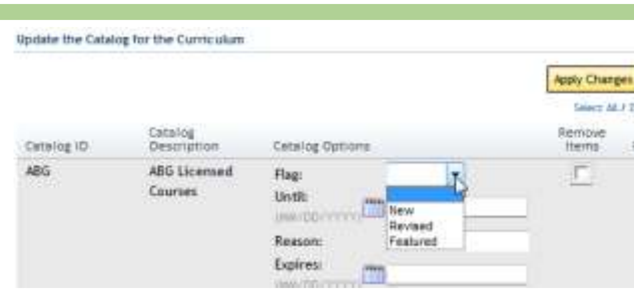
After selecting the Job Positions tab, the > Search > Search Results >View Job Positions screen appears.

Edit a Curriculum Record

Step	Activity	View
39.	Select the **Job Positions** tab to view the Job Positions associated with a Curriculum record. **Note**: Relationships between Curricula and Job Positions are managed in **References > Job Positions** menu on the Curricula tab.	
40.	Select the **Assignment Profiles** tab.	
41.	Select **Add one or more from list** to search for and enter Documents into the Curriculum record.	
42.	On the **> Search** screen, enter the appropriate search criteria.	
43.	Click **Search**.	
44.	Select the **Add** check box for each Assignment Profile to be added to the Curriculum.	
45.	Click **Add**.	
46.	Review the added Assignment Profiles in the **Update the Subcurricula for the Curriculum** section. **Tip**: To remove an Assignment Profile from the curriculum, select the **Remove** check box.	

Notes

Edit a Curriculum Record

Step	Activity	View
47.	Click **Apply Changes**. Caution: Do not select a different tab prior to clicking Apply Changes or all changes and modifications will be lost.	
48.	Select the **Catalogs** tab.	
49.	Select **Add one or more from list** to search for and enter the Catalogs in which you would like for this Curriculum to appear.	
50.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
51.	Click **Search**.	
52.	Select the **Add** check box for each Catalog to which the Curriculum should be added.	
53.	Click **Add**.	
54.	Designate **Flag** information and enter an **Expiration Date**, if needed.	

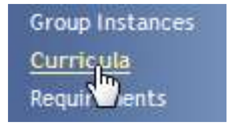
Notes

Copy a Curriculum Record

Step **Activity** **View**

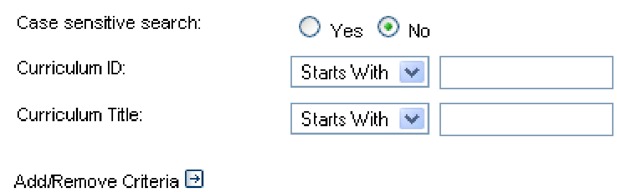
1. Select the **Learning** menu.

2. Select **Curricula**.

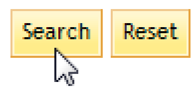


3. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.

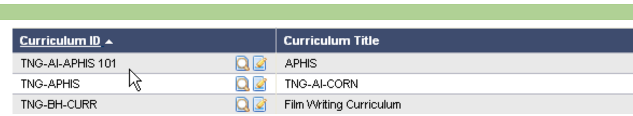


4. Click **Search**.

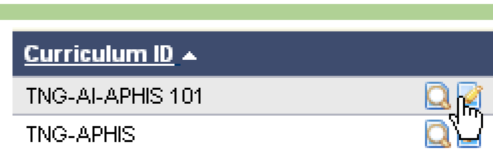


5. On the **Results** tab, locate the desired Curriculum record.

Tip: Use the **Ctrl+F** function to quickly find a Curricula on the screen.

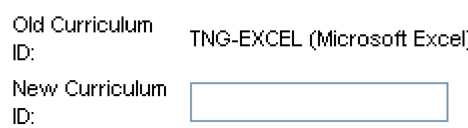


6. Click the **Edit** icon for the Curriculum to be copied.



7. Click **Copy Curriculum…**.

8. Enter a new curriculum ID in the **New Curriculum ID** field.



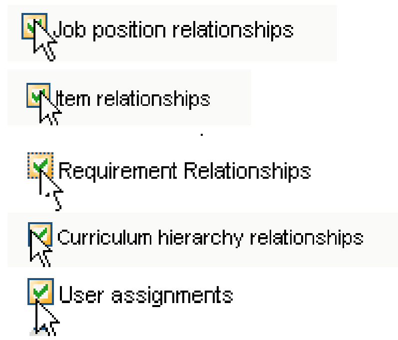
9. Select the **Document info** check box to copy the Document information to the new Curriculum.

Notes

Copy a Curriculum Record

Step | **Activity** | **View**

10. Select the **Job position relationships**, **Item relationships**, **Requirement relationships**, **Curriculum hierarchy relationships**, and/or **User assignments** check boxes to copy these items to the new Curriculum.



11. Click **Copy**.

12. On the **Results** tab, click the new Curriculum's **Edit** icon.

Notes: After clicking the **Copy** button, the **>Search** screen appears, including the copied/new Curriculum.

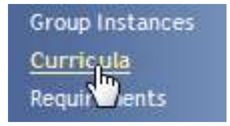
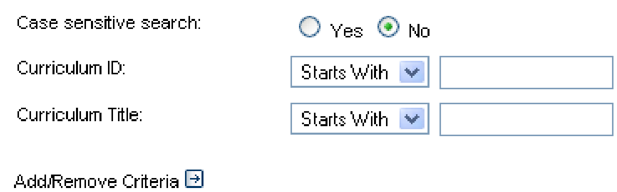
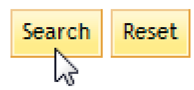
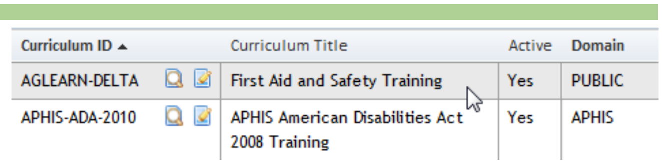
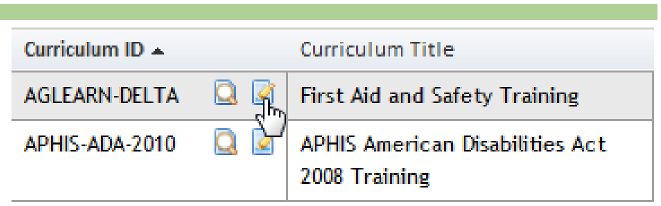
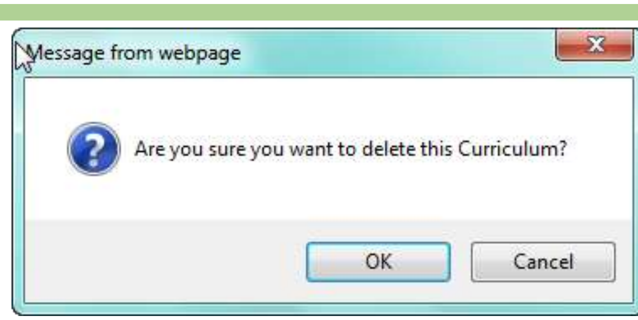
13. Review the new Curriculum record's data. Edit data as appropriate.

Note: See **Edit a Curriculum Record** for deletion, substitution, and re-ordering steps.

Notes: Inform students that at this point, the only difference between the original and copied Curriculum is the ID; appropriate edits are required.

Notes

Delete a Curriculum Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Curricula**.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Results** tab, locate the desired Curriculum record. **Tip**: Use the **Ctrl+F** function to quickly find a Curriculum on the screen.	
6.	Click the **Edit** icon for the Curriculum to be deleted.	
7.	Click **Delete**.	
8.	Click **OK** in the **Confirmation** box.	

Managing Curriculum Assignments

A Curriculum is a grouping of learning Items. Subcurricula, Items, and Documents are grouped in a Curriculum to make them easier to assign, track, and maintain.

Curriculum assignments are managed by editing the Curricula tab of the User record. To assign curricula to multiple Users, see the **User Needs Management Assistant** (User Management menu).

Managing Curriculum Assignment tasks include: **Assign a Curriculum** and **Unassign a Curriculum to a User Record**.

A Day-in-the-Life Scenario

You are asked to:

- Add a Curriculum to a User's record, with a Required Completion date of 90 days from today
- Delete a Curriculum from a User's record

Notes

Assign a Curriculum to a User Record

Step | **Activity** | **View**

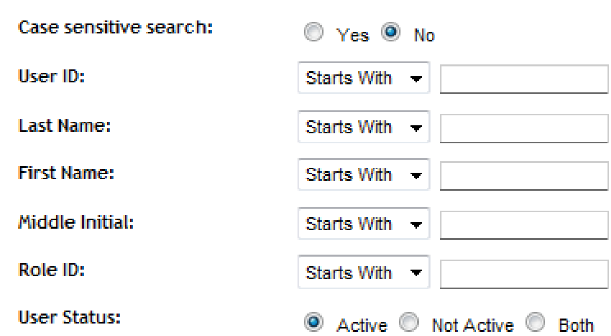
1. Select the **User Management** menu.

2. Select **Users**.

You can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

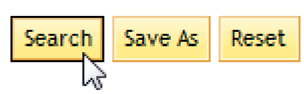
3. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



To assign curricula to multiple learners, see the Learner Needs Management Assistant (Learner Management menu).

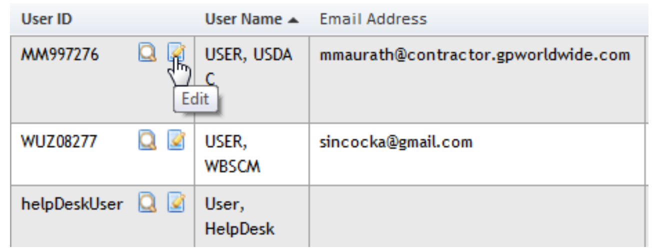
4. Click **Search**.



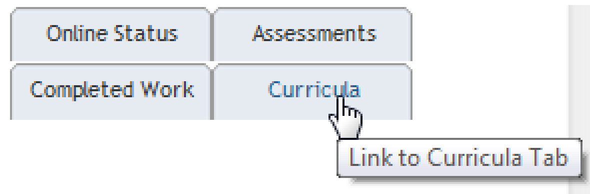
5. On the **Results** screen, locate the desired User record.

Tip: Use the **Ctrl+F** function to quickly find a User record on the screen.

6. Click the corresponding **Edit** icon.

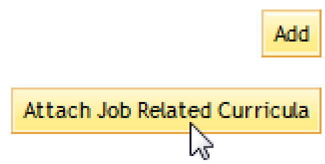


7. Click the **Curricula** tab.

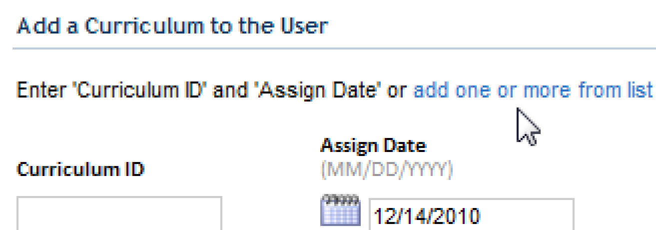


Curricula will appear only if they have previously been associated with a job position.

8. Click **Attach Job Related Curricula** to assign all the Curricula which are associated with the selected User's job position.

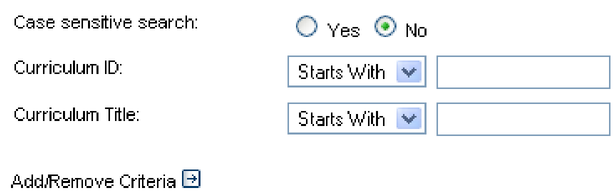


9. Select the **Add one or more from list** link to search for and enter a curriculum ID and assign date.

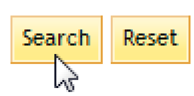


10. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



11. Click **Search**.

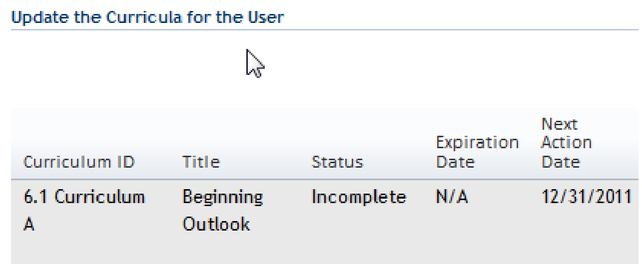


12. Select the desired curriculum's corresponding **Add** check box.

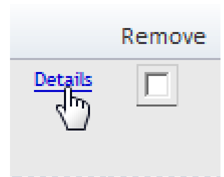
13. Click **Add**.

If the Curriculum has associated subcurricula, a Plus sign (**+**) will precede the name of the Curriculum.

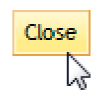
14. Scroll down to the **Update the Curricula for the User** section to view the newly assigned curriculum.



15. Click the **Details** link to view the Items for the Curriculum.

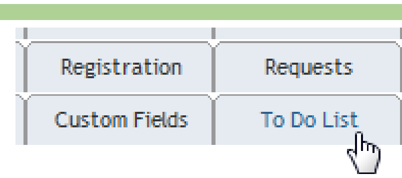


16. Click **Close** to close the Curricula Items window.



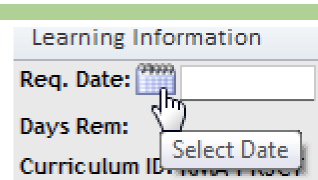
Curricula Items can be modified by clicking the **To-Do List** tab.

17. Click the **To-Do List** tab to enter the required dates for the curricula and sub-curricula.



18. Scroll down to the **Update the Learning Plan for the User** section.

19. Click the **Req**. **Date** Calendar icon to select and enter the date by which that User must complete the Item. Repeat for all Items listed.

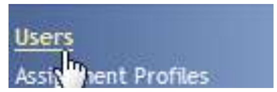
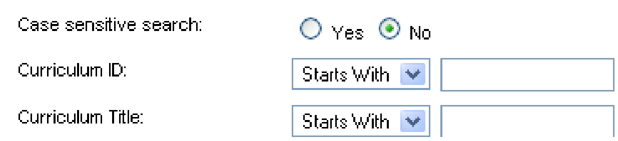
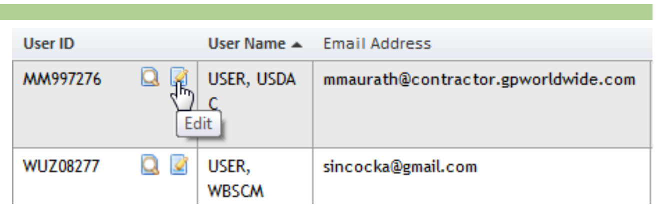
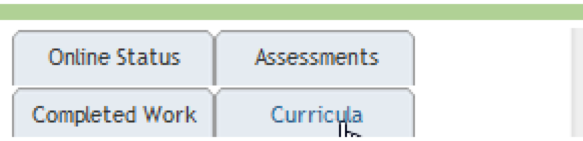
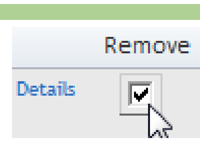
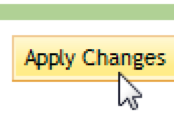


20. Click **Apply Changes**.

Caution: Do not click a different tab prior to clicking **Apply Changes** or all changes and modifications will be lost.

Notes

Remove a Curriculum from a User Record

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Users**.	
3.	On the **> Search** screen, enter the appropriate search criteria.	
4.	Click **Search**.	
5.	On the **> Search Results** screen, locate the desired User record.	
6.	Select the corresponding **Edit** icon.	
7.	Click the **Curricula** tab.	
8.	Scroll down to the **Update the Curricula for the User** section of the screen.	
9.	Select the corresponding **Remove** check box of the Curriculum to be unassigned.	
10.	Click **Apply Changes**.	

Managing Classes

A Class is a group of Users who are assigned the same items and attend and complete the same set of Scheduled Offerings as a group. Each Class has a specific start and end date. Subtasks pertaining to **Managing Classes** are accessible from the **Scheduling** menu. Class specific subtasks include the following: **View**, **Add**, **Edit**, and **Delete a Class Record**. Several reasons for editing a Class record include the following: adding/deleting Users, auto registering Users, and adding a Scheduled Offering.

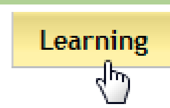
A Day-in-the-Life Scenario

You have received notification that a group of 5 new employees are starting their jobs next week. They have already been added to AgLearn; it is now your responsibility to assign them to the standard Items that all new hires must complete within their first 3 months on the job.

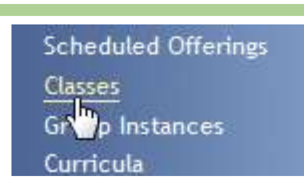
View a Class Record

Step | Activity | View

1. Select the **Learning** menu.

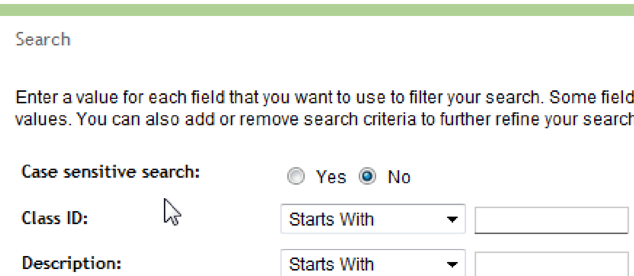


2. Select **Classes**.

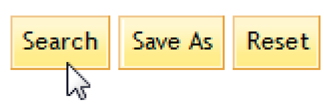


3. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.

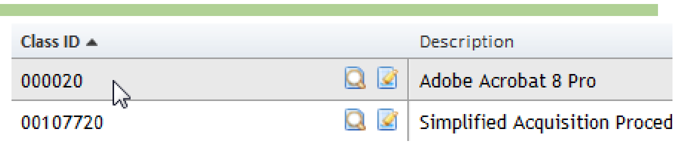


4. Click **Search**.

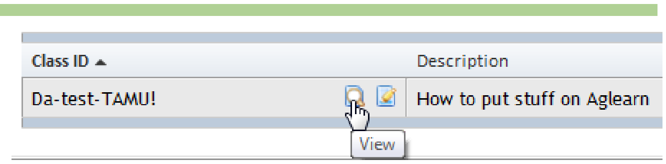


5. On the **Results** screen, locate the desired Class.

Tip: Use **Ctrl+F** to quickly find a Class.



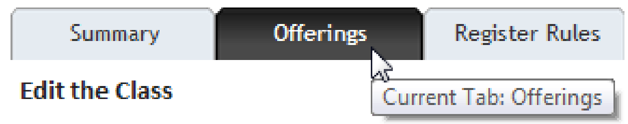
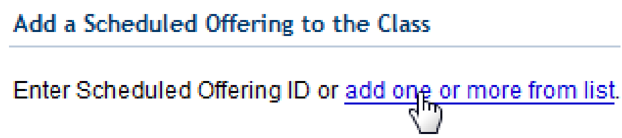
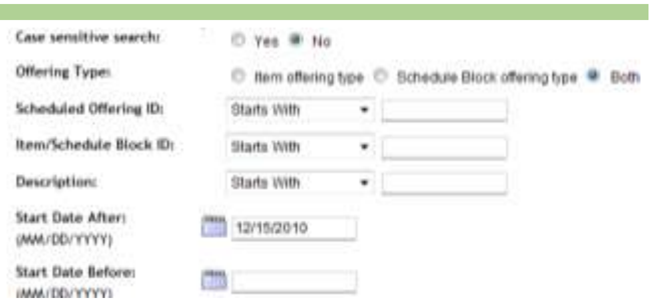
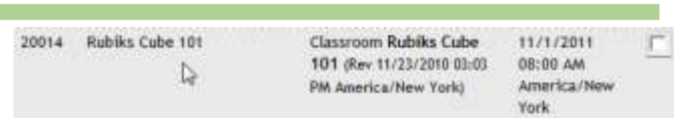
6. Click the corresponding **View** link to view the Class.



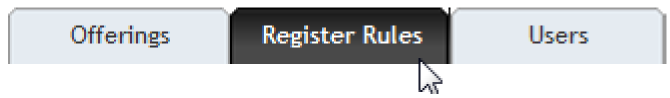
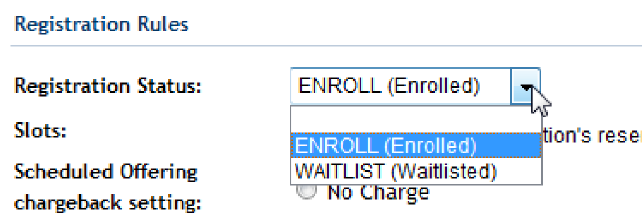
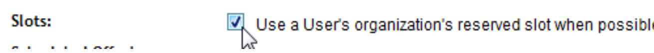
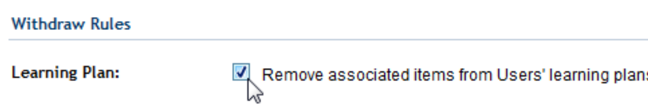
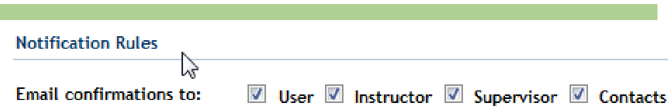
Add a New Class Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Classes**.	
3.	Select the **Add New** link.	
4.	Enter a Class ID in the **Class ID** field.	
5.	Enter a Class description in the **Description** field.	
6.	Click the **Domain** selection icon to search for and enter a Domain.	
7.	Click the **Curriculum** selection icon to search for and enter a curriculum (if applicable). **Note**: If a User is removed from the Class, the curriculum is unassigned.	
8.	Enter the maximum number of Users allowed in the Class in the **Max Size** field.	
9.	Click the **Start Date** calendar icon to select and enter a start date.	
10.	Click the **End Date** calendar icon to select and enter an end date.	

Add a New Class Record

Step	Activity	View
11.	Click **Add**. **Caution**: A Validation Error message will appear if all required fields are not complete.	
12.	Click the **Offerings** tab.	
13.	Select the **Add one or more from list** link to add a Scheduled Offering(s).	
14.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
15.	Click **Search**.	
16.	On the **Results** screen, locate the desired Scheduled Offering. **Tip**: Use **Ctrl+F** to quickly find a Class.	
17.	Select the **Auto Register** check box next to each Scheduled Offering to be registered. **Note**: A User can not be added without selecting **Auto Register**. Conversely, a User can not be auto registered without selecting **Add**.	

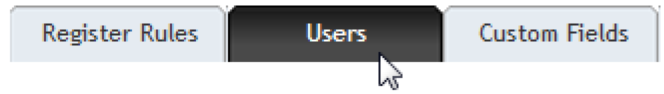
Add a New Class Record

Step	Activity	View
18.	Select the **Add** check box next to each Scheduled Offering to be added.	
19.	Click **Add**. **Caution**: A Warning Details message will appear if the selected Scheduled Offering falls outside the Class start or end dates.	
20.	Click the **Register Rules** tab.	
21.	Select a registration status for the Class from the **Registration Status** drop-down list.	
22.	Select the **Slots** check box to use the Slots reserved by organizations that have Users assigned to the Class.	
23.	Scroll down to the **Withdraw Rules** section to select the **Learning Plan** check box to remove associated items from To-Do Lists.	
24.	Scroll down to the **Notification Rules** section to select the **Notification** check box for each person requiring a confirmation e-mail.	
25.	Click **Apply Changes**. **Caution**: Do not select a different tab prior to clicking **Apply Changes** or else all changes and modifications will be lost.	

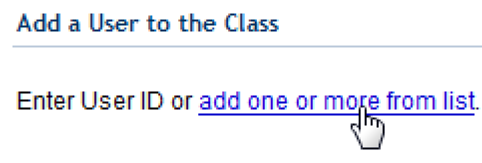
Add a New Class Record

Step | **Activity** | **View**

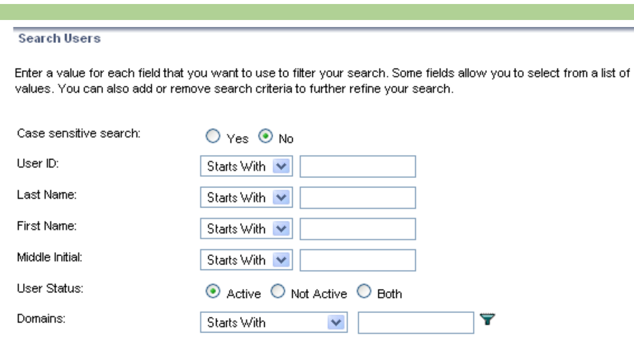
26. Click the **Users** tab.



27. Select the **Add one or more from list** link to add a User(s).

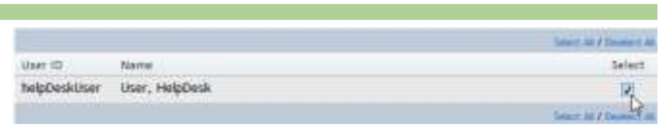


28. On the **> Search** screen, enter the appropriate search criteria.

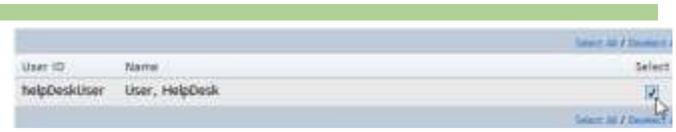


29. Click **Search**.

30. On the **Results** tab, locate the desired User.



31. Select the **Select** check box next to each User to be added.



32. Click **Add**.

Tip: Use the Calendar and Selection icon assistants to avoid data formatting errors.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

Edit a Class Record

Step | **Activity** | **View**

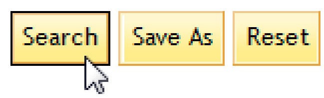
1. Select the **Learning** menu.

2. Select **Classes**.

3. On the **> Search** screen, enter the appropriate search criteria.

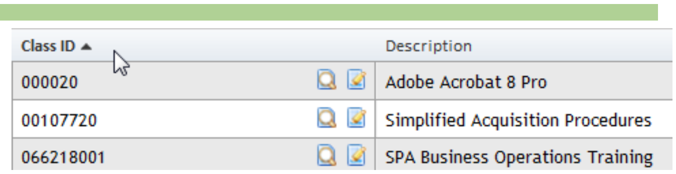
Note: See **Managing Data Entry and Searches** for more detailed information on searching.

4. Click **Search**.

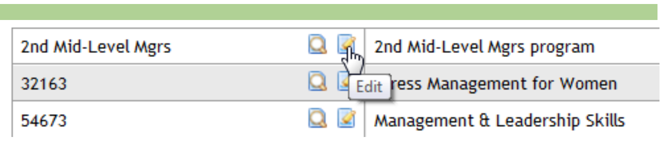


5. On the **Results** screen, locate the desired Class.

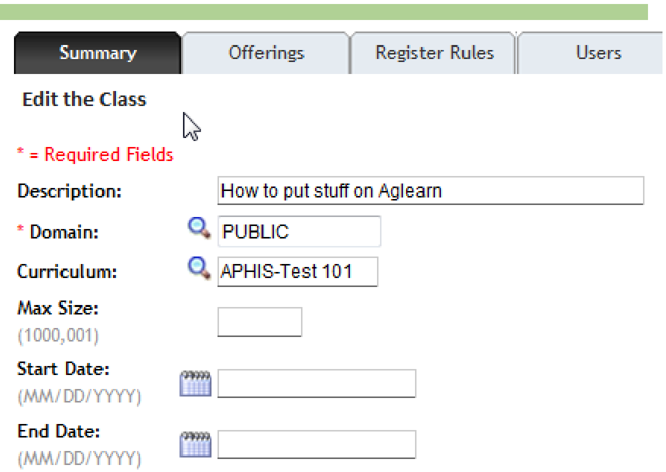
Tip: Use **Ctrl+F** to quickly find a Class.



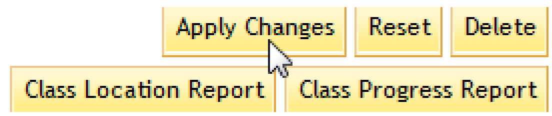
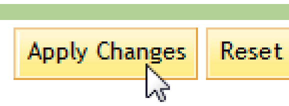
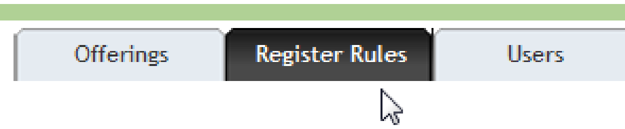
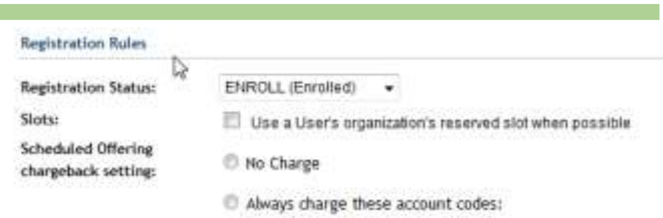
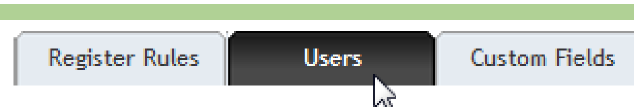
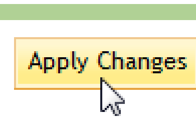
6. Click the corresponding **Edit** icon to edit Class information.



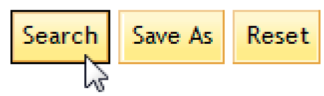
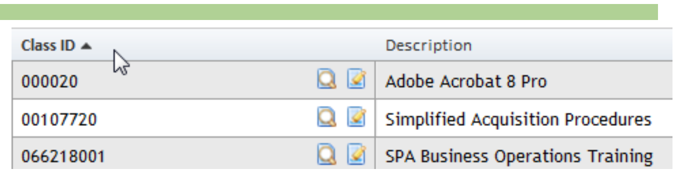
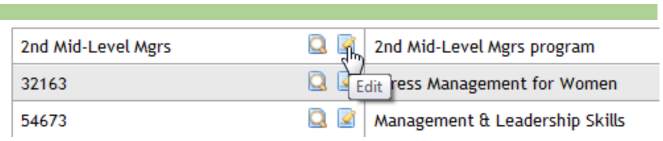
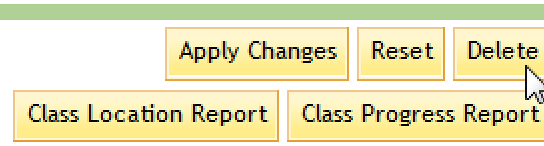
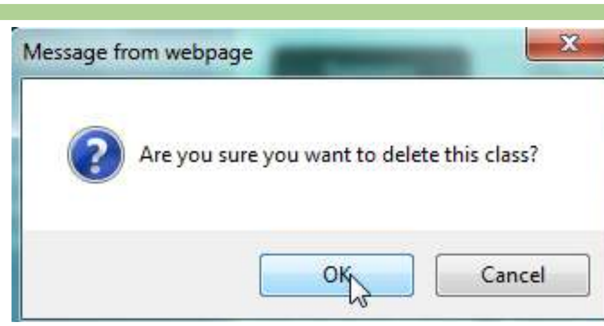
7. Make the appropriate changes to the information on the **Summary** tab.



Edit a Class Record

Step	Activity	View
8.	Click **Apply Changes**. **Caution**: Do not select a different tab prior to clicking **Apply Changes** or else all changes and modifications will be lost.	
9.	Click the **Offerings** tab.	
10.	Make the appropriate changes. **Note**: On this screen, Scheduled Offerings are added and removed and auto registration is set up.	
11.	Click **Apply Changes**.	
12.	Click the **Register Rules** tab.	
13.	Make the appropriate changes.	
14.	Click **Apply Changes**.	
15.	Click the **Users** tab.	
16.	Make the appropriate changes. **Note**: Here Users can be added, removed, moved to another Class, and have their Class status changed.	
17.	Click **Apply Changes**.	

Delete a Class Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Classes**.	
3.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
4.	Click **Search**.	
5.	On the **Results** tab, locate the desired Class. **Tip**: Use **Ctrl+F** to quickly find a Class.	
6.	Click the corresponding **Edit** icon.	
7.	Click **Delete**.	
8.	Click **OK** in the **Confirmation** box.	

User Needs Management

The User Needs Management (UNM) Assistant provides onscreen instructions for each step of the process of adding to, or removing elements from, a User record or group of User records.

The User Needs Management Assistant is available from the **User Management** menu.

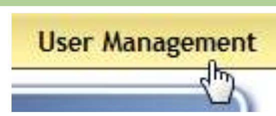
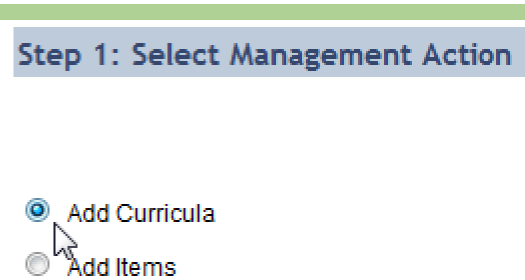
User Needs Management Assistant tasks include **Add Curricula**, **Add Items**, **Add Competency Profiles**, **Add Competencies**, **Add Job-related Curricula**, **Add Job-related Competency Profiles**, **Remove Curricula**, **Remove Items**, **Remove Competency Profiles**, and **Remove Competencies to/from User record(s) with the UNM (User Needs Management) Assistant**.

A Day-in-the-Life Scenario:

It has been decided to assign First Aid and CPR training Items to several AgLearn Security Guards involved in a special AgLearn-hosted event.

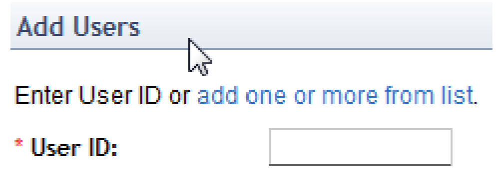
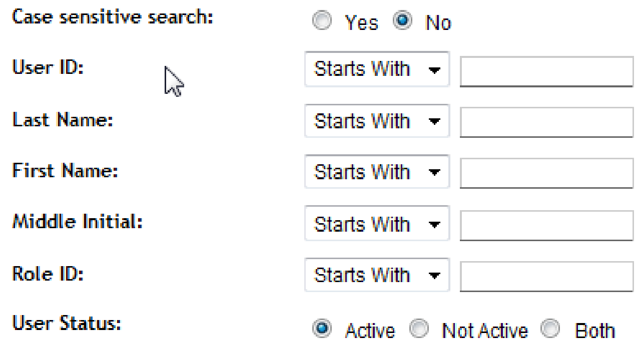
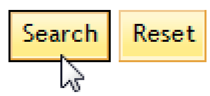
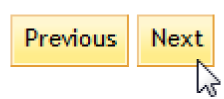
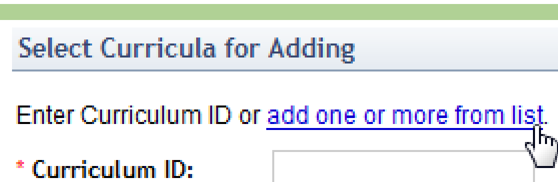
Notes

Add Curricula to User Record(s) with the UNM Assistant

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Tools** from the left menu.	
3.	Select **User Needs Mgmt**.	
4.	Click the **Add Curricula** option button.	
5.	Click **Next** to move to Step 2.	

Notes

Add Curricula to User Record(s) with the UNM Assistant

Step	Activity	View
6.	Select the **Add one or more from list** link to search for and enter Users into the UNM Assistant.	
7.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
8.	Click **Search**.	
9.	On the **Results** tab, select the corresponding **Add** check box for each User to be added.	
10.	Click **Add**.	
11.	Review the Users in the **Edit Users** section. **Tip**: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.	
12.	Click **Next** to move to Step 3.	
13.	Select the **Add one or more from list** link to search for and enter Curricula into the UNM Assistant.	

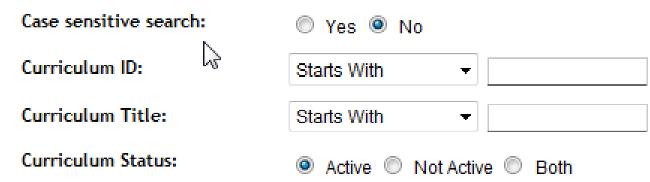
Notes

Add Curricula to User Record(s) with the UNM Assistant

Step | **Activity** | **View**

14. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



15. Click **Search**.

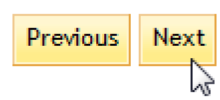
16. On the **Results** tab, select the corresponding **Add** check box for each curriculum to be added.

17. Click **Add**.

18. Review the curricula in the **Edit the List of Curricula for Adding** section.

Tip: To remove curricula, select the corresponding **Remove** check box and click **Apply Changes**.

19. Click **Next** to move to Step 4.

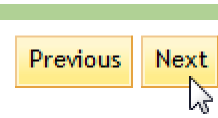


Assign dates can be set in the past, but not in the future.

20. For each curriculum listed, click the corresponding **Assign Date** Calendar icon to select and enter an assign date for that curriculum.

Note: The current date is the default date.

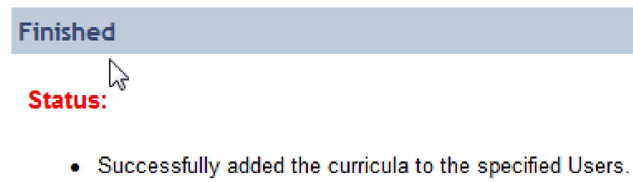
21. Click **Next** to move to Step 5.



Notes

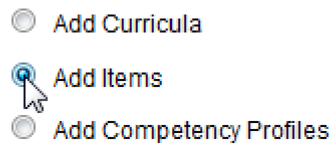
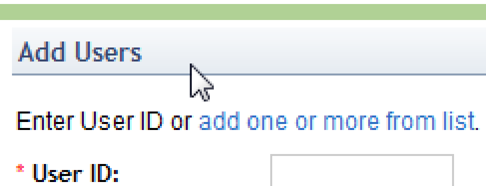
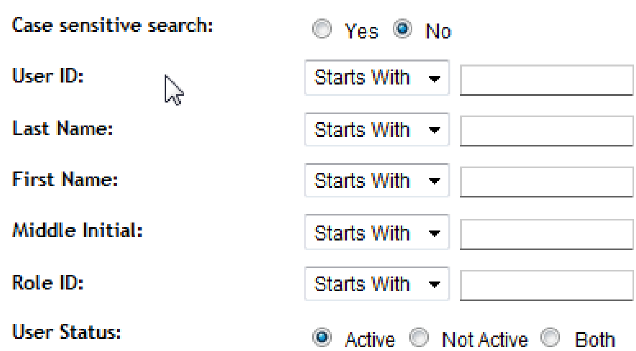
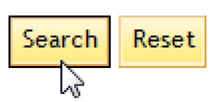
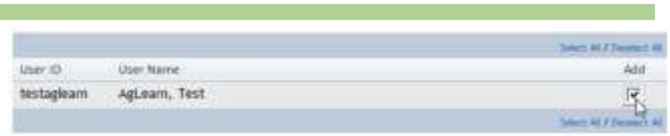
Jobs that will add multiple curricula to many Learners can place a strain on system resources. Schedule large jobs (>2000 records) for times when most users are off the system.

Add Curricula to User Record(s) with the UNM Assistant

Step	Activity	View
22.	Click **Run Job Now** to have AgLearn complete the assignment to User record(s). **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
23.	Review the Status message(s) on the **Finished** screen.	

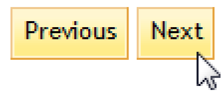
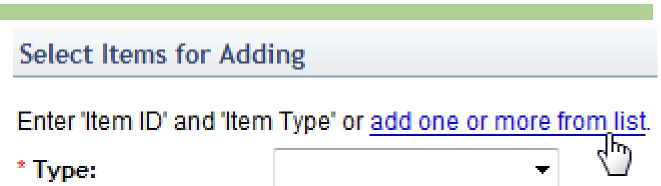
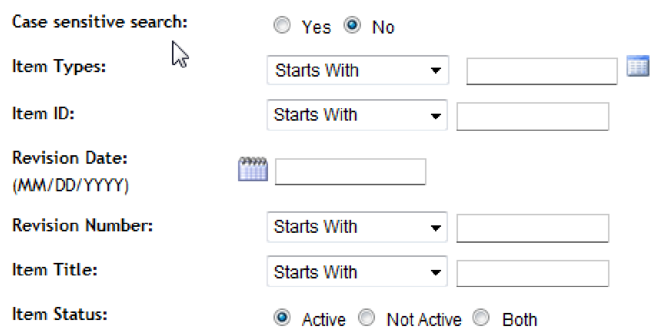
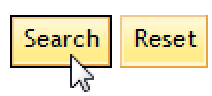
Notes

Adding Items to User Record(s) with the UNM Assistant

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Tools** from the left menu.	
3.	Select **User Needs Mgmt**.	
4.	Click the **Add Items** option button.	
5.	Click **Next** to move to Step 2.	
6.	Select the **Add one or more from list** link to search for and enter Users into the UNM Assistant.	
7.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
8.	Click **Search**.	
9.	On the **Results** tab, select the corresponding **Add** check box for each User to be added.	

Notes

Adding Items to User Record(s) with the UNM Assistant

Step	Activity	View
10.	Click **Add**.	
11.	Review the Users in the **Edit Users** section. **Tip**: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.	
12.	Click **Next** to move to Step 3.	
13.	Select the **Add one or more from list** link to search for and enter Items into the UNM Assistant.	
14.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
15.	Click **Search**.	
16.	On the **Results** tab select the corresponding **Add** check box for each Item to be added.	
17.	Click **Add**.	

Notes

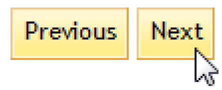
Adding Items to User Record(s) with the UNM Assistant

Step | **Activity** | **View**

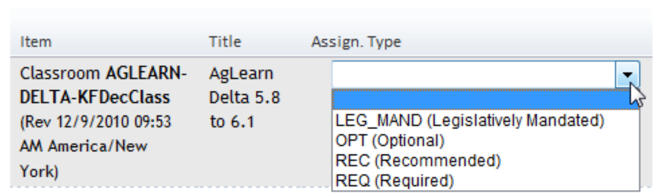
18. Review the Items in the **Edit the List of Items for Adding** section.

Tip: To remove Items, select the corresponding **Remove** check box and click **Apply Changes**.

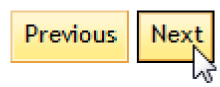
19. Click **Next** to move to Step 4.



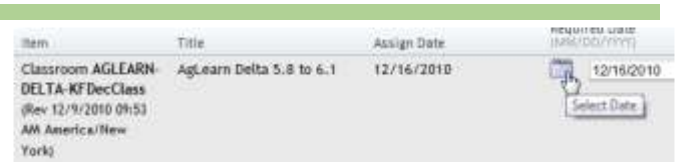
20. For each Item listed, click the corresponding **Assign Type** to select an assignment type for that Item.



21. Click **Next** to move to Step 5.



22. For each Item listed, click the corresponding **Required Date** Calendar icon to select and enter the date by which the User must complete that Item.

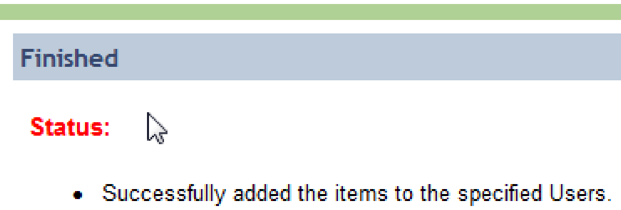


Jobs that will add multiple items to many Learners can place a strain on system resources. Schedule large jobs (>2000 records) for times when most users are off the system.

23. Click **Run Job Now** to have AgLearn complete the assignment to User record(s).

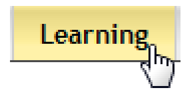
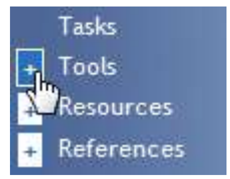
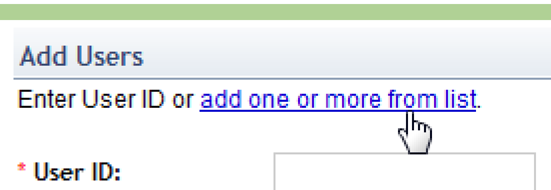
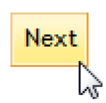
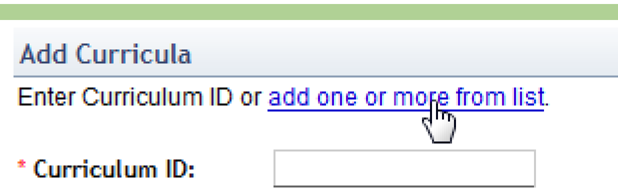
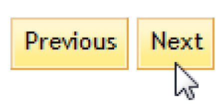
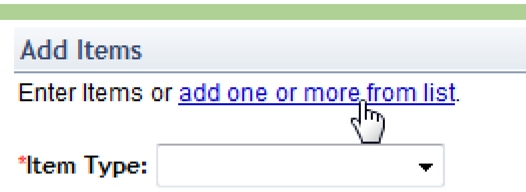
Note: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.

24. Review the Status message(s) on the **Finished** screen.

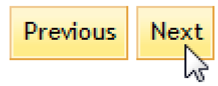
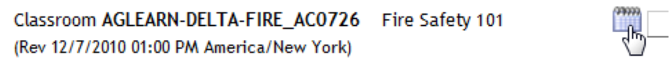
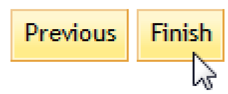


Caution: Do not use the browser's **Back** button when using the UNM Assistant. Use the **Previous** button to move back to previous step(s).

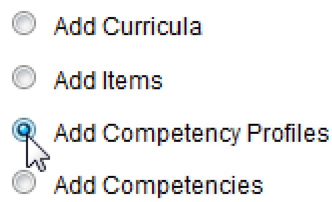
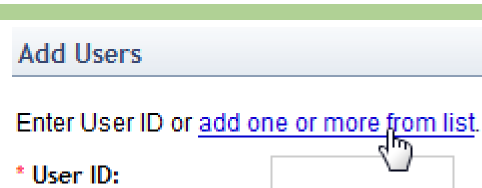
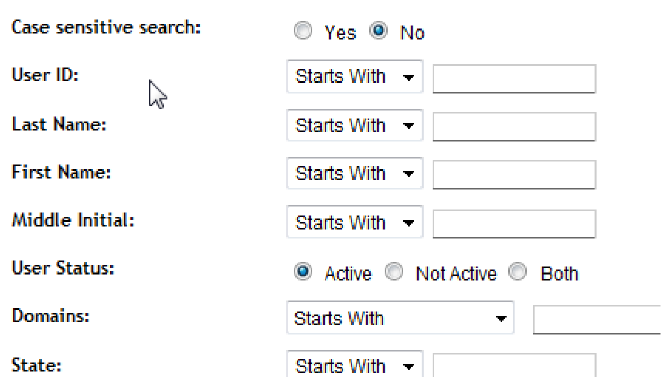
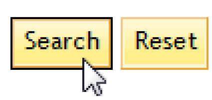
Editing a "Required By" Date by Using the Required Dates Editor

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Tools**.	
3.	Select **Required Dates Editor**.	
4.	Select the **Add one or more from list** link to search for and enter Users into the Required Dates Editor.	
5.	When the list is complete, click **Next**.	
6.	Select the **Add one or more from list** link to search for and enter Curricula into the Required Dates Editor. **Note**: For more information on searches, see **Managing Data Entry and Searches** earlier in this manual.	
7.	When the list is complete, click **Next**.	
8.	Select the **Add one or more from list** link to search for and enter Items into the Required Dates Editor. **Note**: For more information on searches, see **Managing Data Entry and Searches** earlier in this manual.	

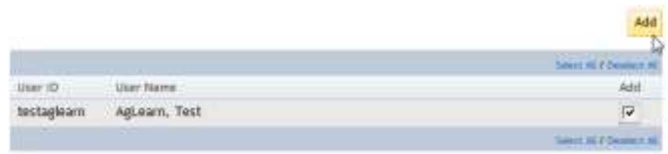
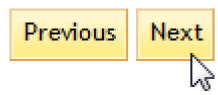
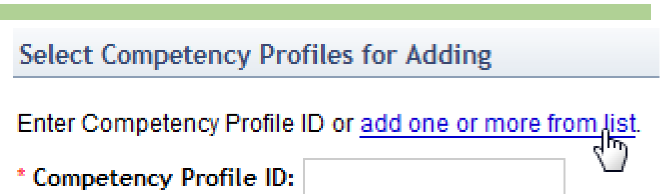
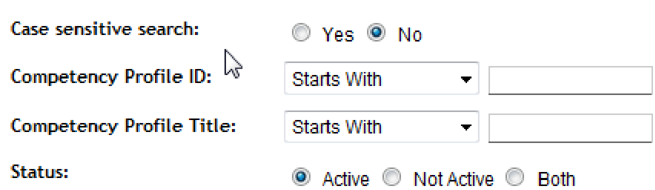
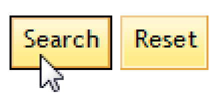
Editing a “Required By” Date by Using the Required Dates Editor

Step	Activity	View
9.	When the list is complete, click **Next**.	
10.	In the **Required Date** text box, edit the required dates for the selected Items to indicate the new required date for each Item.	
11.	Click **Finish**.	

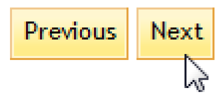
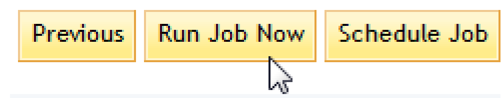
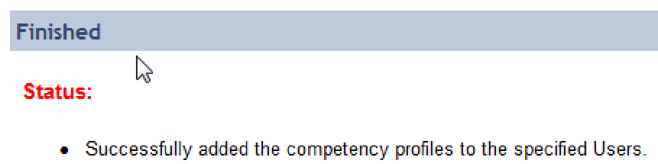
Add Competency Profiles to User Record(s) with the UNM Assistant

Notes	Step	Activity	View
	1.	Select the **User Management** menu.	
	2.	Select **Tools** from the left menu.	
	3.	Select **User Needs Mgmt**.	
	4.	Click the **Add Competency Profiles** option button.	
After clicking **Next**, the **Step 2: Select Learners** screen appears.	5.	Click **Next** to move to Step 2.	
Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel necessary.	6.	Select the **Add one or more from list** link to search for and enter Users into the UNM Assistant.	
After selecting the **add one or more from list** link, the **> Search** screen appears.	7.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	8.	Click **Search**.	

Add Competency Profiles to User Record(s) with the UNM Assistant

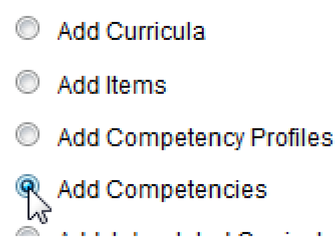
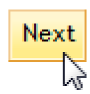
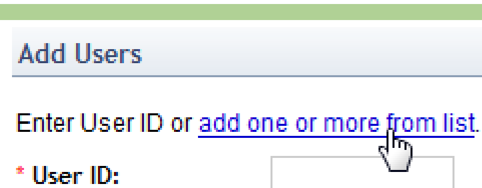
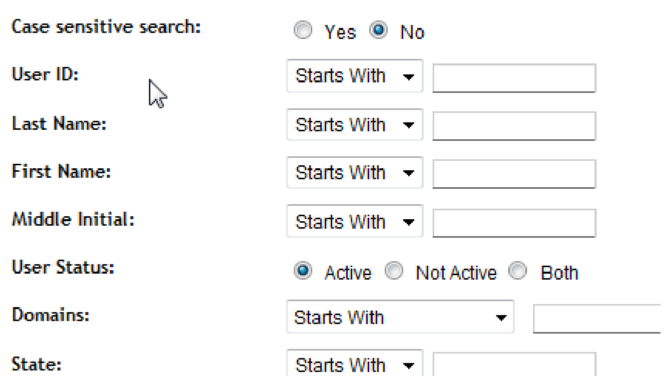
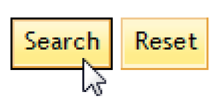
Notes	Step	Activity	View
After clicking Search, the **Results** tab appears.	**9.**	On the **Results** screen select the corresponding **Add** check box for each User to be added.	
	10.	Click **Add**.	
After clicking **Add**, the **Step 2: Select Learners** screen appears.	**11.**	Review the Users in the **Edit Users** section. **Tip**: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.	
	12.	Click **Next** to move to Step 3.	
After clicking Next, the Step 3: Adding Competency Profiles screen appears.	**13.**	Select the **Add one or more from list** link to search for and enter competency profiles into the UNM Assistant.	
After selecting the **add one or more from list** link, the **> Search** screen appears.	**14.**	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	15.	Click **Search**.	
After clicking Search, the **Results** tab appears.	**16.**	On the **Results** tab select the corresponding **Add** check box for each competency profile to be added.	
	17.	Click **Add**.	

Add Competency Profiles to User Record(s) with the UNM Assistant

Notes	Step	Activity	View
After clicking Add, the Step 3: Adding Competency Profiles screen appears.	**18.**	Review the competency profiles in the **Edit the List of Competency Profiles for Adding** section. **Tip**: To remove a competency profile, select the corresponding **Remove** check box and click **Apply Changes**.	
	19.	Click **Next** to move to Step 4.	
Tell students that jobs that will add multiple items or curricula to many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.	**20.**	Click **Run Job Now** to have AgLearn complete the assignment to User record(s). **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears.	**21.**	Review the Status message(s) on the **Finished** screen.	

Notes

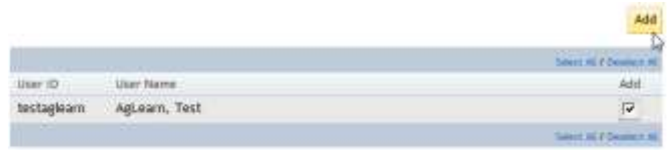
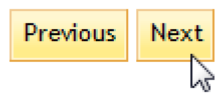
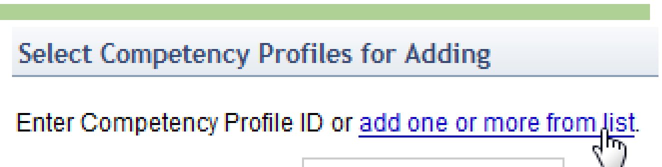
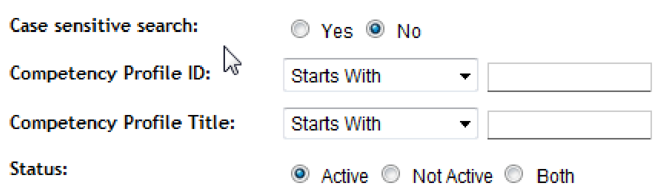
Add Competencies to User Record(s) with the UNM Assistant

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Tools** from the left menu.	
3.	Select **User Needs Mgmt**.	
4.	Click the **Add Competencies** option button.	
5.	Click **Next** to move to Step 2.	
6.	Select the **Add one or more from list** link to search for and enter Users into the UNM Assistant.	
7.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
8.	Click **Search**.	

After clicking **Next**, the **Step 2: Select Learners** screen appears.

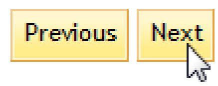
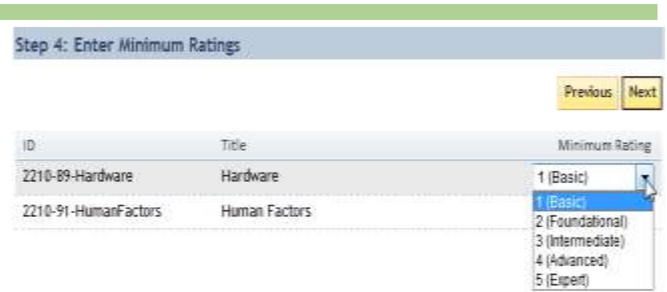
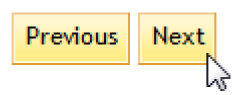
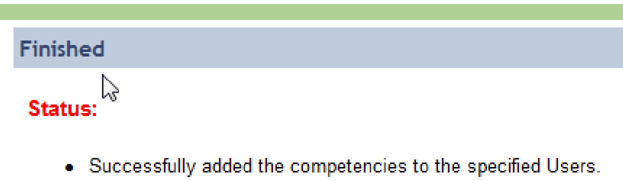
After selecting the **add one or more from list** link, the **> Search** screen appears.

Add Competencies to User Record(s) with the UNM Assistant

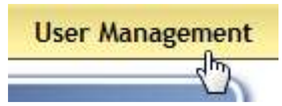
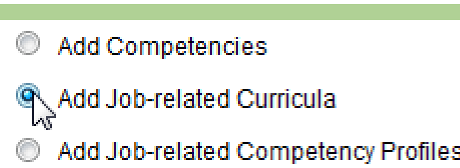
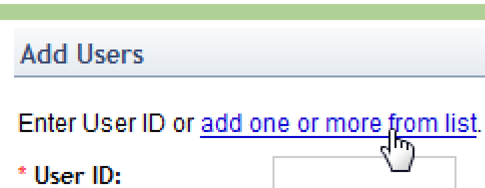
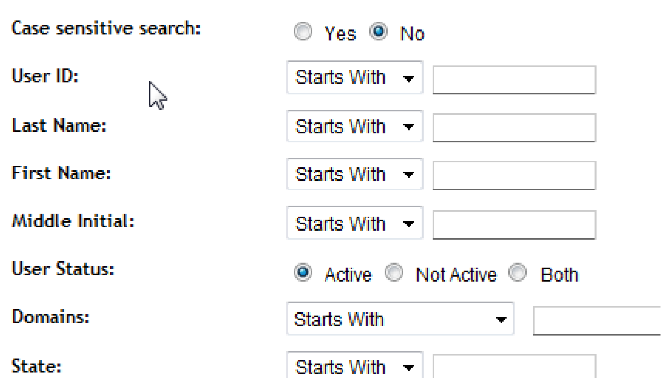
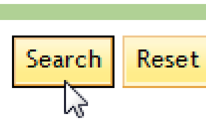
Notes	Step	Activity	View
After clicking Search, the **Results** tab appears.	9.	On the **Results** tab select the corresponding **Add** check box for each User to be added.	
	10.	Click **Add**.	
After clicking **Add**, the **Step 2: Select Learners** screen appears.	11.	Review the Users in the **Edit Users** section. **Tip**: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.	
	12.	Click **Next** to move to Step 3.	
After clicking **Next**, the **Step 3: Adding Competencies** screen appears.	13.	Select the **Add one or more from list** link to search for and enter competencies into the UNM Assistant.	
After selecting the **add one or more from list** link, the **> Search** screen appears.	14.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	15.	Click **Search**.	
After clicking Search, the **Results** tab appears.	16.	On the **Results** tab select the corresponding **Add** check box for each competency to be added.	
	17.	Click **Add**.	

Notes

Add Competencies to User Record(s) with the UNM Assistant

Notes	Step	Activity	View
After clicking **Add**, the **Step 3: Adding Competencies** screen appears.	**18.**	Review the competencies in the **Edit the List of Competencies for Adding** section. **Tip**: To remove a competency, select the corresponding **Remove** check box and click **Apply Changes**.	
After clicking **Next,** the **Step 4: Enter Minimum Ratings** screen appears.	**19.**	Click **Next** to move to Step 4.	
Discuss Required Level/mastery level by using an example like Public Speaking – different levels of mastery are required for Programmers than Public Information Officers.	**20.**	For each competency, select the required mastery level for that User or group of Users. Repeat for each Competency from the **Minimum Rating** drop-down list.	
	21.	Click **Next** to move to Step 5.	
Tell students that jobs that will add multiple items to many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.	**22.**	Click **Run Job Now** to have AgLearn complete the assignment to User record(s). **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears.	**23.**	Review the Status message(s) on the **Finished** screen.	

Add Job-related Curricula to User Record(s) with the UNM Assistant

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Tools** from the left menu.	
3.	Select **User Needs Mgmt**.	
4.	Select the **Add Job-related Curricula** option button.	
5.	Click **Next** to move to Step 2.	
6.	Select the **Add one or more from list** link to search for and enter Users into the UNM Assistant.	
7.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
8.	Click **Search**.	

Notes

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as necessary.

After clicking **Next**, the **Step 2: Select Learners** screen appears.

After selecting the **add one or more from list** link, the **> Search** screen appears.

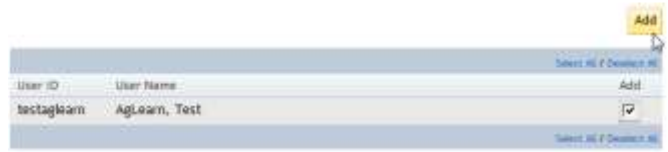
Notes

Add Job-related Curricula to User Record(s) with the UNM Assistant

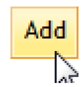
Step | **Activity** | **View**

After clicking Search, the **Results** tab appears.

9. On the **Results** screen select the corresponding **Add** check box for each User to be added.



10. Click **Add**.

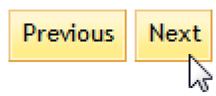


After clicking **Add**, the **Step 2: Select Learners** screen appears.

11. Review the Users in the **Edit Users** section.

Tip: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.

12. Click **Next** to move to Step 3.



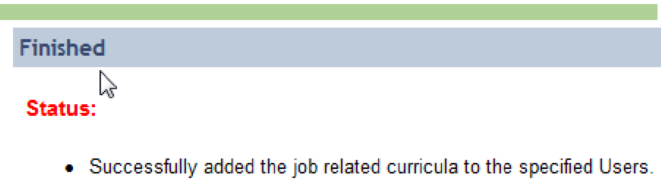
Tell students that jobs that will add multiple items to many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.

13. Click **Run Job Now** to have AgLearn complete the assignment of job-related curricula to the listed User record(s).

Note: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.

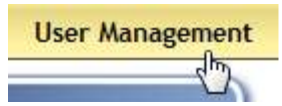
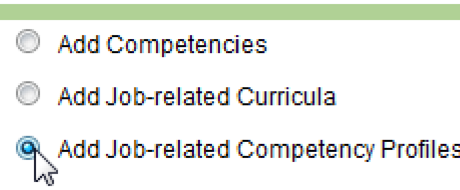
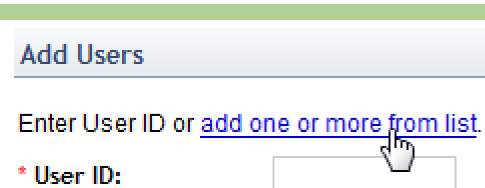
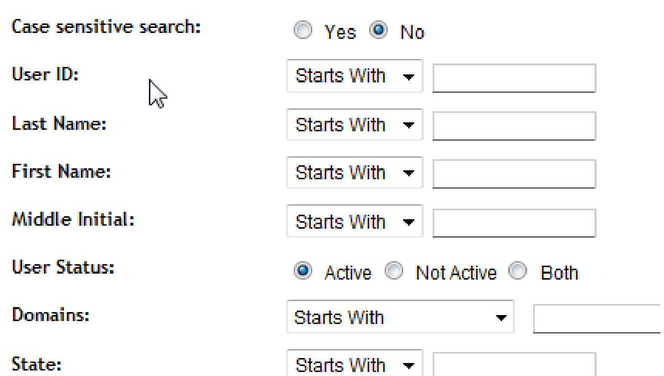
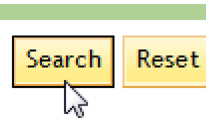
After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears.

14. Review the Status message on the **Finished** screen.



Notes

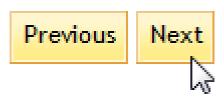
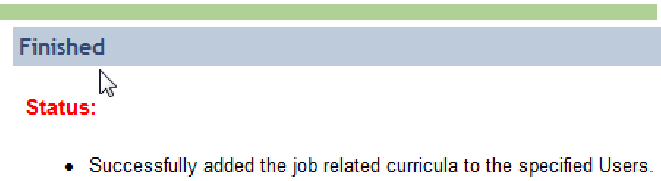
Add Job-related Competency Profiles to User Record(s) with the UNM Assistant

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Select the User Management menu.</td><td>
</td></tr>
<tr><td>2.</td><td>Select Tools from the left menu.</td><td>
</td></tr>
<tr><td>3.</td><td>Select User Needs Mgmt.</td><td>
</td></tr>
<tr><td>4.</td><td>Click the Job-related Competency Profiles option button.</td><td>
</td></tr>
<tr><td>5.</td><td>Click Next to move to Step 2.</td><td>
</td></tr>
<tr><td>6.</td><td>Select the Add one or more from list link to search for and enter Users into the UNM Assistant.</td><td>
</td></tr>
<tr><td>7.</td><td>On the > Search screen, enter the appropriate search criteria.
Note: See Managing Data Entry and Searches for more detailed information on searching.</td><td>
</td></tr>
<tr><td>8.</td><td>Click Search.</td><td>
</td></tr>
</table>

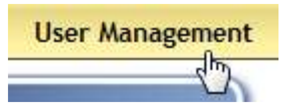
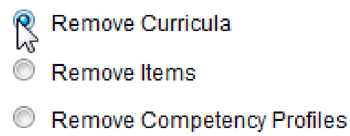
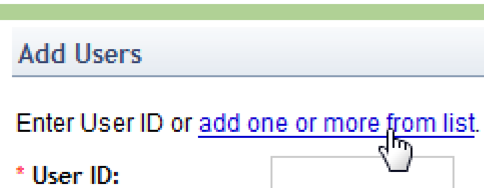
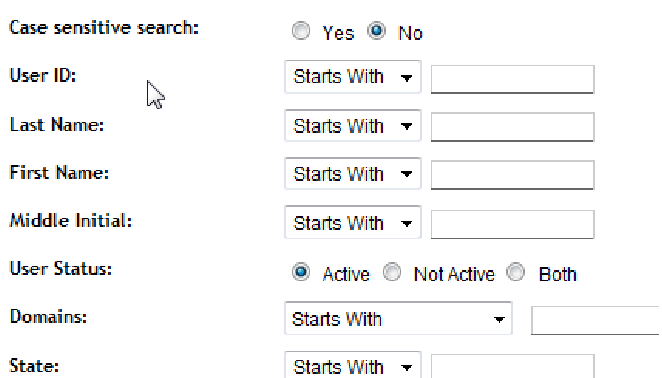
After clicking **Next**, the **Step 2: Select Learners** screen appears.

After selecting the **add one or more from list** link, the **> Search** screen appears.

Add Job-related Competency Profiles to User Record(s) with the UNM Assistant

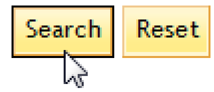
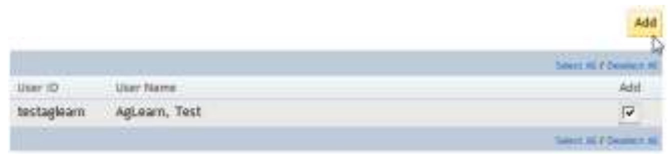
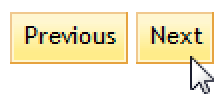
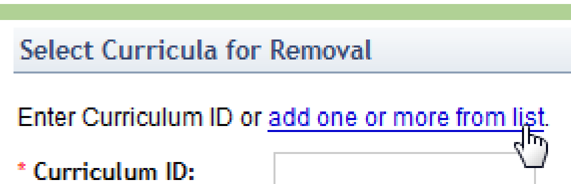
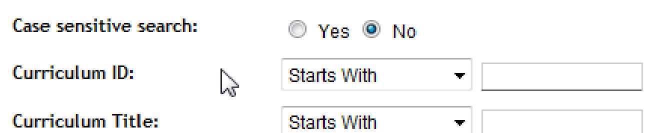
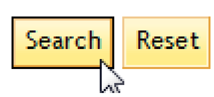
Notes	Step	Activity	View
After clicking Search, the **Results** tab appears.	**9.**	Locate the User(s) on the **Results** screen. Select the corresponding **Add** check box for each User to be added.	
	10.	Click **Add**.	
After clicking **Add**, the **Step 2: Select Learners** screen appears.	**11.**	Review the Users in the **Edit Users** section. **Tip**: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.	
	12.	Click **Next** to move to Step 3.	
Tell students that jobs that will add multiple items to many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system. After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears.	**13.**	Click **Run Job Now** to have AgLearn complete the assignment of job-related curricula to the listed User record(s). **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
	14.	Review the Status message on the **Finished** screen.	

Remove Curricula from User Record(s) with the UNM Assistant

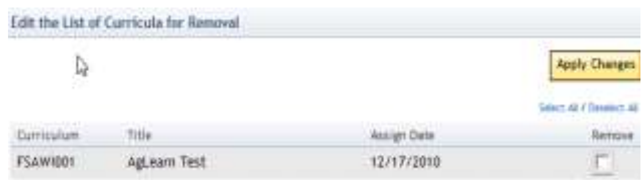
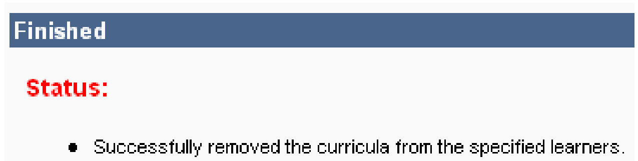
Notes	Step	Activity	View
	1.	Select the **User Management** menu.	
	2.	Select **Tools** from the left menu.	
	3.	Select **User Needs Mgmt**.	
	4.	Click the **Remove Curricula** option button.	
	5.	Click **Next** to move to Step 2.	
Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel necessary. After clicking **Next**, the **Step 2: Select Learners** screen appears.	6.	Select the **Add one or more from list** link to search for and enter Users into the UNM Assistant.	
After selecting the **add one or more from list** link, the **> Search** screen appears.	7.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	

Notes

Remove Curricula from User Record(s) with the UNM Assistant

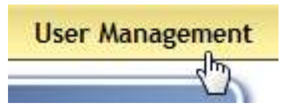
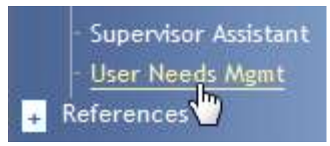
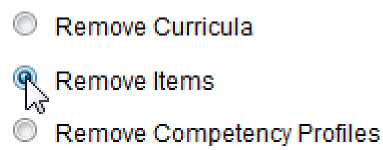
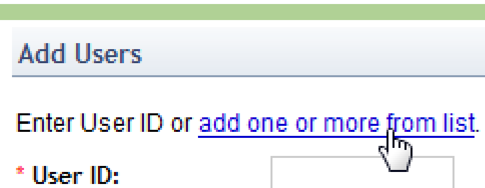
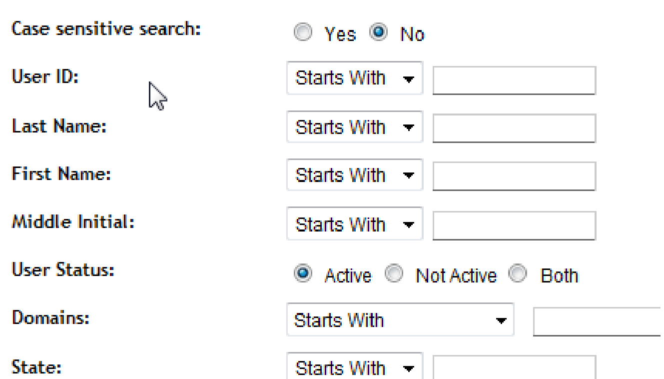
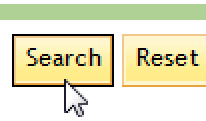
Notes	Step	Activity	View
	8.	Click **Search**.	
After clicking Search, the **Results** tab appears.	9.	Locate the User(s) on the **Results** tab. Select the corresponding **Add** check box for each User to be added.	
	10.	Click **Add**.	
After clicking **Add**, the **Step 2: Select Learners** screen appears.	11.	Review the Users in the **Edit Users** section. **Tip**: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.	
	12.	Click **Next** to move to Step 3.	
After clicking **Next**, the **Step 3: Removing Curricula** screen appears.	13.	Select the **Add one or more from list** link to search for and enter curricula into the list of curricula for removal.	
After selecting the **add one or more from list** link, the **> Search** screen appears.	14.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	15.	Click **Search**.	

Remove Curricula from User Record(s) with the UNM Assistant

Notes	Step	Activity	View
After clicking Search, the **Results** tab appears. Clarify that students are building a list of curriculum to be removed.	**16.**	On the **Results** tab, select the corresponding **Add** check box for each curriculum to be added to the list of curricula for removal.	
	17.	Click **Add**.	
Clarify that if a curriculum was mistakenly added to the Removal list, this action provides a means to correct the error.	**18.**	Review the curricula in the **Edit the List of Curricula for Removal** section. **Tip**: To remove a Curriculum from the **List of Curricula for Removal**, select the corresponding **Remove** check box.	
Inform students that jobs that will remove multiple items from many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.	**19.**	Click **Run Job Now** to have AgLearn complete the un-assignment to User record(s). **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears.	**20.**	Review the Status message on the **Finished** screen.	

Notes

Removing Items from User Record(s) with the UNM Assistant

Notes	Step	Activity	View
	1.	Select the **User Management** menu.	
	2.	Select **Tools** from the left menu.	
	3.	Select **User Needs Mgmt**.	
	4.	Click the **Remove Items** option button.	
After clicking **Next**, the **Step 2: Select Learners** screen appears.	**5.**	Click **Next** to move to Step 2.	
	6.	Select the **Add one or more from list** link to search for and enter Users into the UNM Assistant.	
After selecting the **add one or more from list** link, the **> Search** screen appears.	**7.**	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	8.	Click **Search**.	

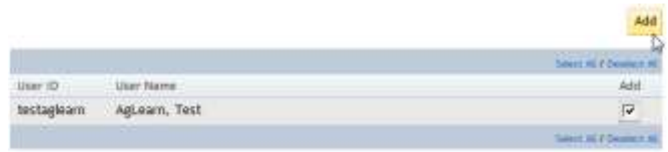
Notes

Removing Items from User Record(s) with the UNM Assistant

Step | Activity | View

After clicking Search, the **Results** tab appears.

9. On the **Results** screen select the corresponding **Add** check box for each User to be added.



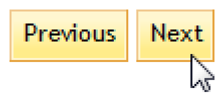
10. Click **Add**.

After clicking **Add**, the **Step 2: Select Learners** screen appears.

11. Review the Users in the **Edit Users** section.

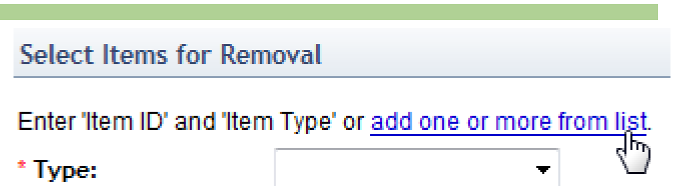
Tip: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.

12. Click **Next** to move to Step 3.



After clicking **Next**, the **Step 3: Removing Items** screen appears.

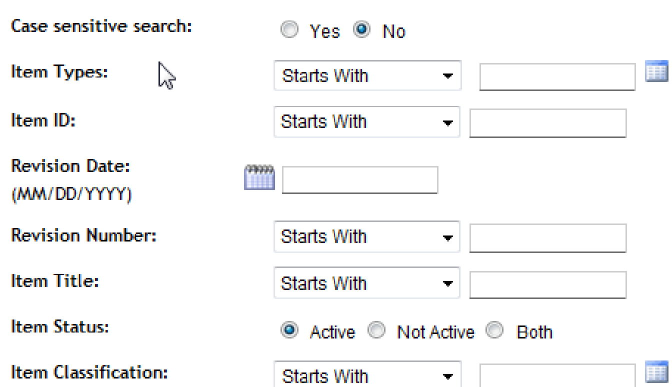
13. Select the **Add one or more from list** link to search for and enter Items into the list of Items for removal.



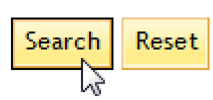
After selecting the **add one or more from list** link, the **> Search** screen appears.

14. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



15. Click **Search**.



Notes

Removing Items from User Record(s) with the UNM Assistant

Step | Activity | View

After clicking Search, the **Results** tab appears.

Clarify that students are building a list of Items to be removed.

16. On the **Results** tab select the corresponding **Add** check box for each Item to be added to the list of Items for removal.

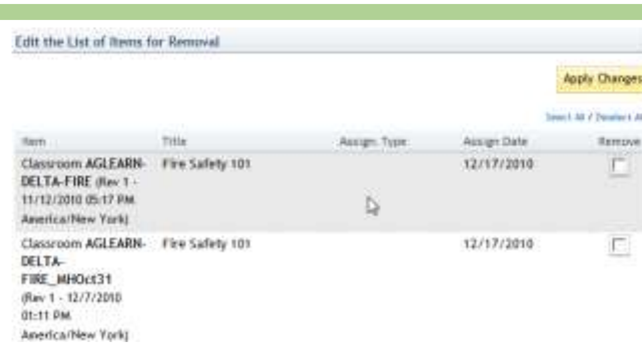
After clicking **Add**, the **Step 3: Removing Items** screen appears.

17. Click **Add**.

Clarify that if an Item was mistakenly added to the Removal list, this action provides a means to correct the error.

18. Review the Items in the **Edit the List of Items for Removal** section.

Tip: To remove an Item from the **List of Items for Removal**, select the corresponding **Remove** check box.



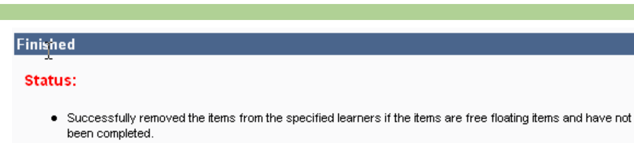
Jobs that will remove multiple items from many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.

19. Click **Run Job Now** to have AgLearn complete the un-assignment to User record(s).

Note: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.

After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears.

20. Review the Status message(s) on the **Finished** screen.

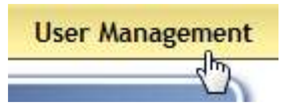


Notes

Remove Competency Profiles from User Record(s) with the UNM Assistant

Step | Activity | View

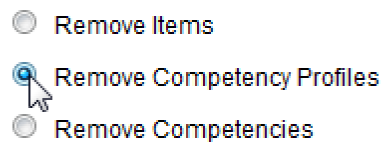
1. Select the **User Management** menu.



2. Select **Tools** from the left menu.

3. Select **User Needs Mgmt**.

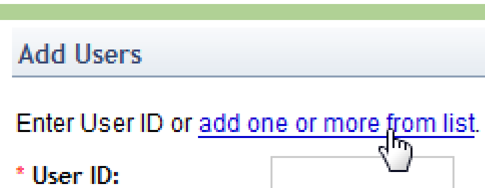
4. Click the **Remove Competency Profiles** option button.



5. Click **Next** to move to Step 2.

Notes: After clicking **Next**, the **Step 2: Select Learners** screen appears.

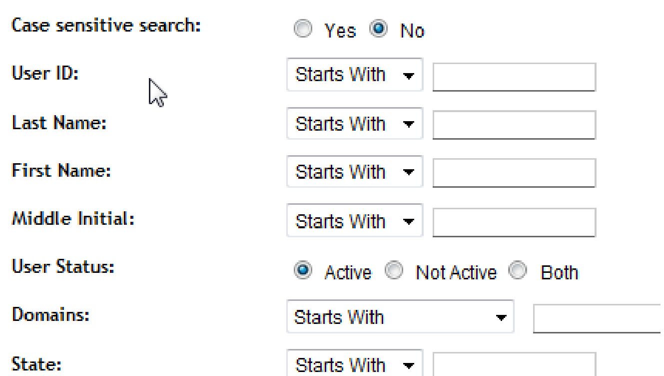
6. Select the **Add one or more from list** link to search for and enter Users into the UNM Assistant.



Notes: Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel necessary.

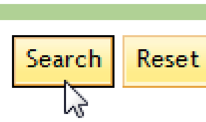
7. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



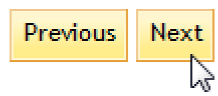
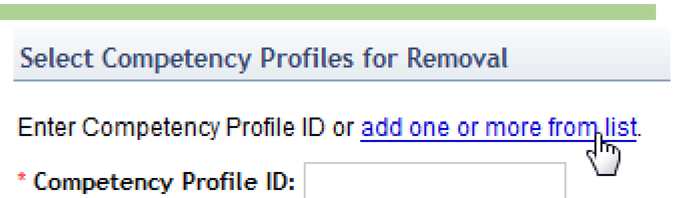
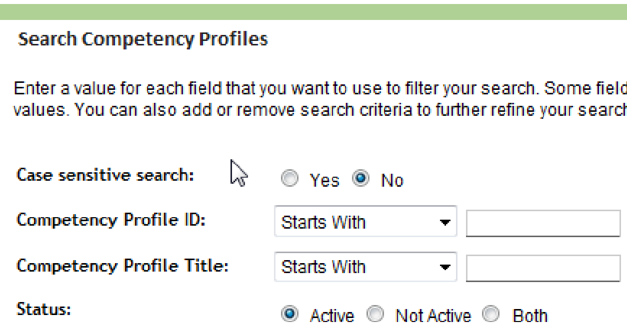
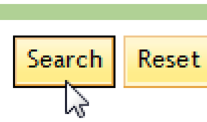
Notes: After selecting the **add one or more from list** link, the **> Search** screen appears.

8. Click **Search**.

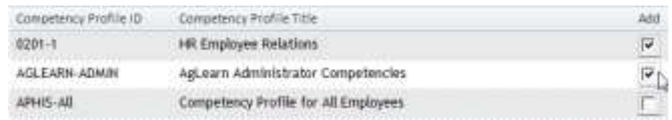
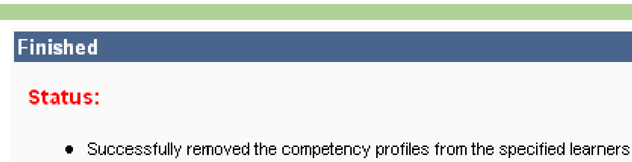


Notes

Remove Competency Profiles from User Record(s) with the UNM Assistant

Notes	Step	Activity	View
After clicking Search, the **Results** tab appears.	9.	On the **Results** tab, select the corresponding **Add** check box for each User to be added.	
	10.	Click **Add**.	
After clicking **Add**, the **Step 2: Select Learners** screen appears.	11.	Review the added Users in the **Edit Users** section. **Tip**: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.	
	12.	Click **Next** to move to Step 3.	
After clicking Next, the Step 3: Removing Competency Profiles screen appears.	13.	Select the **Add one or more from list** link to search for and enter competency profiles into the list of competency profiles for removal.	
After selecting the **add one or more from list** link, the **> Search** screen appears.	14.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	15.	Click **Search**.	

Remove Competency Profiles from User Record(s) with the UNM Assistant

Notes	Step	Activity	View
After clicking Search, the **Results** tab appears. Clarify that students are building a list of profiles to be removed.	**16.**	On the **Results** tab, select the corresponding **Add** check box for each competency profile to be added to the list of competency profiles for removal.	
After clicking Add, the Step 3: Removing Competency Profiles screen appears.	**17.**	Click **Add**.	
Clarify that if a profile was mistakenly added to the Removal list, this action provides a means to correct the error.	**18.**	Review the Competency Profiles in the **Edit the List of Competency Profiles for Removal** section. **Tip**: To remove a Competency Profile from the **List of Competency Profiles for Removal**, select the corresponding **Remove** check box.	
Tell students that jobs that will remove multiple items from many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.	**19.**	Click **Run Job Now** to have AgLearn complete the un-assignment to User record(s). **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears.	**20.**	Review the **Status** message on the **Finished** screen.	

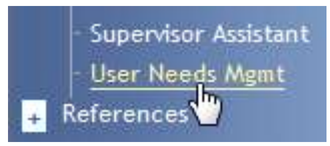
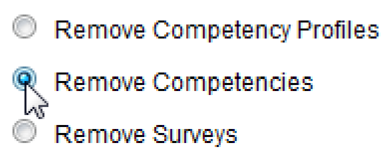
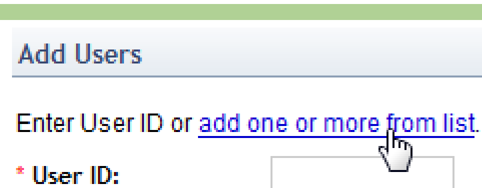
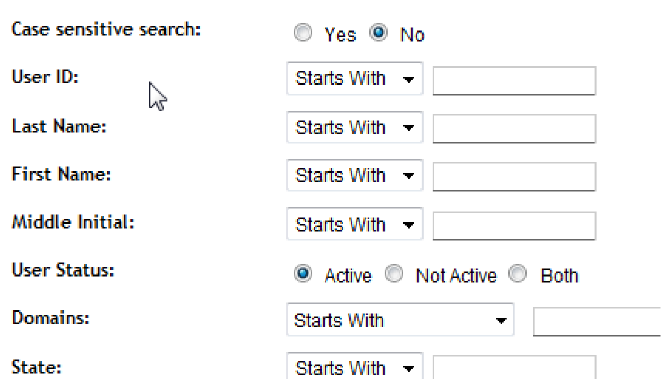
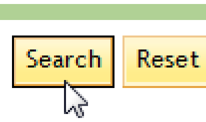
Notes

After clicking **Next**, the **Step 2: Select Learners** screen appears.

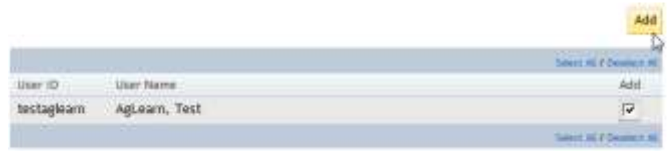
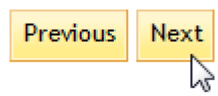
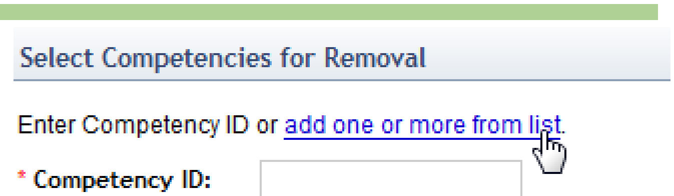
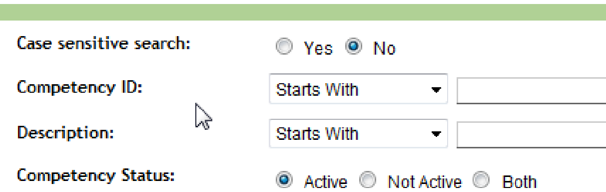
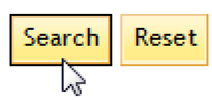
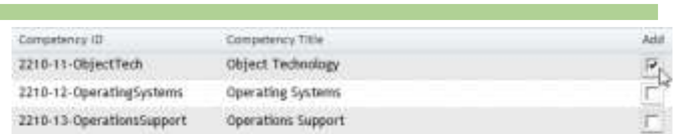
Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel necessary.

After selecting the **add one or more from list** link, the **> Search** screen appears.

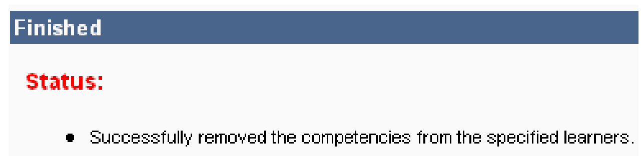
Remove Competencies from User Record(s) with the UNM Assistant

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Tools** from the left menu.	
3.	Select **User Needs Mgmt**.	
4.	Click the **Remove Competencies** option button.	
5.	Click **Next** to move to Step 2.	
6.	Select the **Add one or more from list** link to search for and enter Users into the UNM Assistant.	
7.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
8.	Click **Search**.	

Remove Competencies from User Record(s) with the UNM Assistant

Notes	Step	Activity	View
After clicking Search, the **Results** tab appears.	**9.**	On the **Results** tab select the corresponding **Add** check box for each User to be added.	
	10.	Click **Add**.	
After clicking **Add**, the **Step 2: Select Learners** screen appears.	**11.**	Review the added Users in the **Edit Users** section. **Tip**: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.	
	12.	Click **Next** to move to Step 3.	
After clicking **Next**, the **Step 3: Removing Competencies** screen appears.	**13.**	Select the **Add one or more from list** link to search for and enter competencies into the list of competencies for removal.	
After selecting the **add one or more from list** link, the **> Search** screen appears.	**14.**	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
After clicking Search, the **Results** tab appears.	**15.**	Click **Search**.	
Clarify that students are building a list of competencies to be removed.	**16.**	On the **Results** tab, select the corresponding **Add** check box for each competency to be added to the list of competencies for removal.	
After clicking **Add**, the **Step 3: Removing Competencies** screen appears.	**17.**	Click **Add**.	

Remove Competencies from User Record(s) with the UNM Assistant

Notes	Step	Activity	View
Clarify that if a competency was mistakenly added to the Removal list, this action provides a means to correct the error.	18.	Review the Competencies in the **Edit the List of Competencies for Removal** section. **Tip**: To remove a competency from the **List of Competencies for Removal**, select the corresponding **Remove** check box.	
Tell students that jobs that will remove multiple items from many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.	19.	Click **Run Job Now** to have AgLearn complete the un-assignment to User record(s). **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears.	20.	Review the Status message on the **Finished** screen.	

After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing Learning Events

A learning event refers to a User's completion of an Item, or attempt at completion. Subtasks pertaining to **Managing Learning Events** are accessible from the **User Management** menu. User-specific subtasks include the following: **View**, **Edit**, and **Delete a Learning Event**, and **Record a Learning Event for an Item**, **an External Event**, and a **Scheduled Offering**.

A Day-in-the-Life Scenario

A group of Users just completed their required prerequisite reading for a course.

Notes

View a Learning Event

Step | **Activity** | **View**

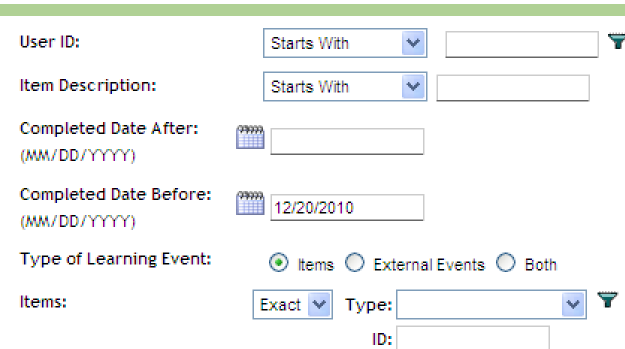
1. Select the **User Management** menu.

2. Select **Tools** from the left menu.

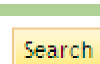
3. Select **Learning Event Editor**.

4. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.



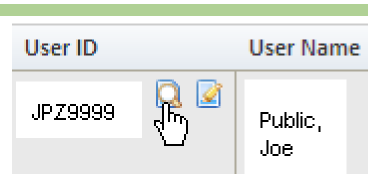
5. Click **Search**.



6. Locate the desired event on the **Results** screen.

Tip: Use **Ctrl+F** to quickly find an event.

7. Click the **View** icon corresponding to the desired event.



Notes

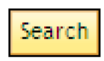
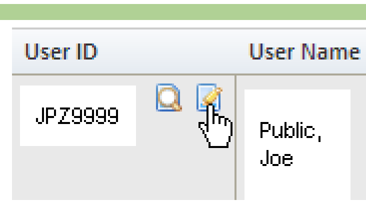
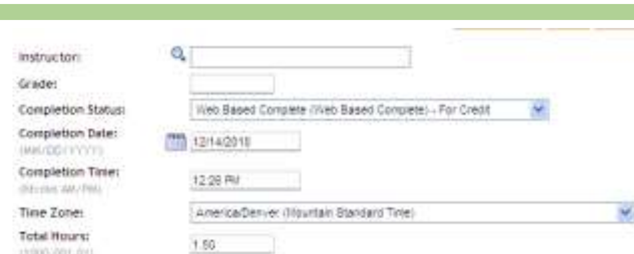
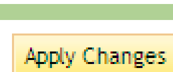
Complete definitions of terms are included in the glossary.

Have students skip to the Record a Learning Event for an Item task in order to have a Learning Event to edit.

Inform students that for the purposes of this training cost is not being addressed and as such they should not enter/change any information on the **Financial** tab.

Inform students that any information they enter in the **Comments** field is viewable by many. Advise them to use caution when entering any comments.

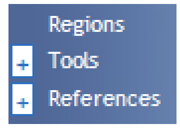
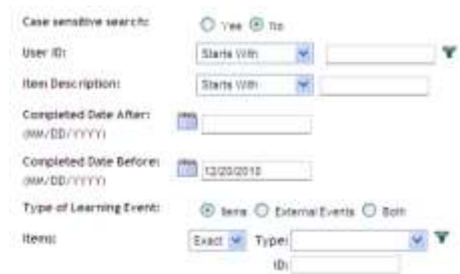
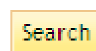
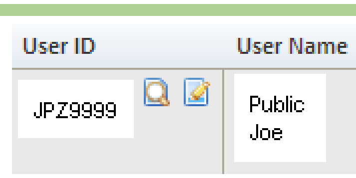
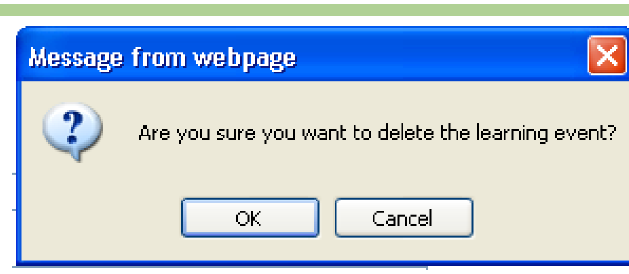
Edit a Learning Event

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Tools** from the left menu.	
3.	Select **Learning Event Editor**.	
4.	On the **> Search** screen, enter the appropriate search criteria.	
5.	Click **Search**.	
6.	Locate the desired event on the **Results** tab. **Tip**: Use the **Ctrl+F** function to quickly find an event.	
7.	Click the **Edit** icon corresponding to the desired Learning Event.	
8.	On the **Summary** tab, make the appropriate changes.	
9.	Click **Apply Changes**.	

Notes

Complete definitions of terms are included in the glossary.

Delete a Learning Event

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Tools** from the left menu.	
3.	Select **Learning Event Editor**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	Locate the desired event on the **Results** tab. **Tip**: Use **Ctrl+F** to quickly find an event.	
7.	Click the **Edit** icon corresponding to the desired Learning Event.	
8.	Click **Delete**.	
9.	Click **OK** in the **Confirmation** box.	

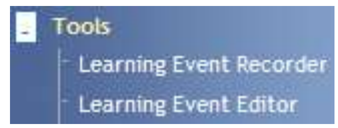
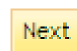
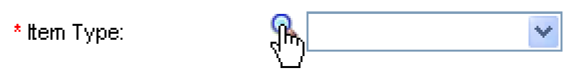
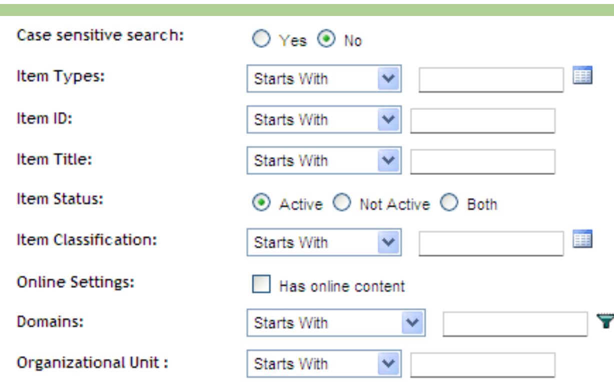
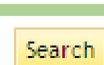
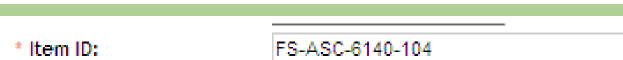
Notes

You can also add a Learning Event by clicking the **Add New** link on the **Learning Event Editor** search screen which will automatically display the **Learning Event Recorder**.

Examples of Items that would not be Scheduled Offerings include On the Job Training (OJT), an interview, or an article.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

Record a Learning Event for an Item

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Tools** from the left menu.	
3.	Select **Learning Event Recorder**.	
4.	Select the **Item** option. **Note**: This is the default selection.	
5.	Click **Next**.	
6.	Click the **Item Type** Search icon to search for and enter an Item for the Learning Event.	
7.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
8.	Click **Search**.	
9.	On the **Results** screen, select the desired Item's corresponding **Select** link to add the Item.	
10.	Verify that the associated Item ID appears in the **Item ID** field. **Note**: The **Revision Date** and **Title** fields will fill in automatically when the **Item Type** selection icon is used to select an Item.	

Notes

Record a Learning Event for an Item

Step	Activity	View
11.	Verify the Item's revision date appears in the **Revision Date** field. **Note**: If a revision date is not specified, the latest revision of the Item will be assumed.	Revision Date: 9/4/2008 10:47 AM America/Denver
12.	Verify an Item title appears in the **Title** field.	Title: Excel Fundamentals
13.	Click **Next**.	Next
14.	Open the **Instructor** Search icon to choose an Instructor.	Instructor ID FSIS-ACKERMAN.DON PDC-ALFRED
15.	Enter the default grade in the **Default Grade** field. **Note**: The default grade can be numeric or ratings-based.	Default Grade:
16.	Select the default completion status for the User from the **Default Completion Status** drop-down list.	* Default Completion Status: Class Completed (Class Completed) - For Credit Class Incomplete (Class Incomplete) - Not For Credit Class Attend (Class Attend) - For Credit Class Waived (Class Waived) - For Credit Class NoShow (Class NoShow) - Not For Credit
17.	Click the **Completion Date** selection icon to select and enter a completion date. **Note**: The default entry for this field is the date on which the event is recorded.	* Completion Date: (MM/DD/YYYY)
18.	Enter the completion time in the **Completion Time** field. **Note**: The default entry for this field is the time at which the event is recorded.	* Completion Time: (hh:mm AM/PM) 10:57 AM
19.	Click the **Time Zone** selection icon to search for and enter a time zone. **Note**: The default entry for this field is obtained from the Item record.	Time Zone: America/Denver (Mountain Standard Time)

Tell students to only change the time zone if necessary. They can skip the step if they will use the default entry.

Notes

Record a Learning Event for an Item

Step **Activity** **View**

20. Enter the default price in the **Default Price** field, if applicable.

21. Enter the number of hours in the **Total Hours** field.

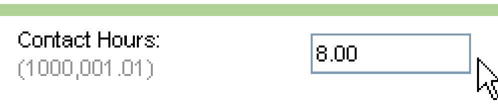
Note: **Total Hours** is the total number of hours during which the resources for the Item were in use.

22. Enter the total number of credit hours that the Users will receive for completing this Item in the **Credit Hours** field.

Note: **Credit Hours** indicates the number of unit hours printed on a Certificate (i.e., number of CEUs, CMEs, etc.).

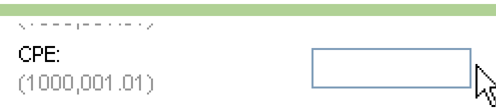
23. Enter the number of contact hours for the Item in the **Contact Hours** field.

Note: **Contact Hours** indicates the total number of hours that the Users actually spent on this Item.

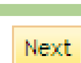


24. Enter the CPE credits in the **CPE** field.

Note: **CPE** shows the total number of credits for professional education hours that the Users will receive for completing this Item.



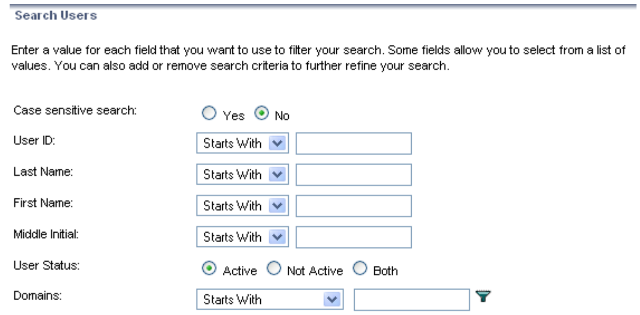
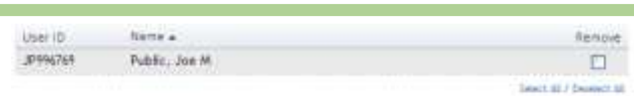
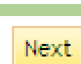
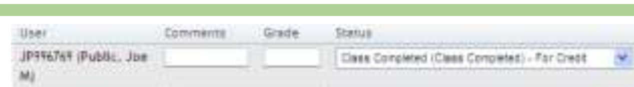
25. Click **Next**.



26. Select the **Add one or more from list** link to search for and enter Users.

Notes

Record a Learning Event for an Item

Step	Activity	View	Notes
27.	On the **> Search** screen, enter the appropriate search criteria.		
28.	On the **Results** tab, select the **Add** check box next to each User to be added to the Learning Event.		
29.	Click **Add**.		
30.	Scroll down to the **Edit Selected Users** section.		
31.	Select the **Remove** check box next to each User to be removed from the list of Users who will have learning events recorded.		The Remove check box is a way to modify the selected list of learners identified on the previous screen. Skip the step if no changes need to be made.
32.	Click **Apply Changes**.		
33.	Click **Next**.		
34.	Enter comments or grades for each User in the appropriate fields and select the appropriate status for each User from the corresponding **Status** drop-down list.		
35.	Click **Next**.		
36.	Click **Next** to skip the **Step 6**: **Edit User Event Financial Information** screen.		

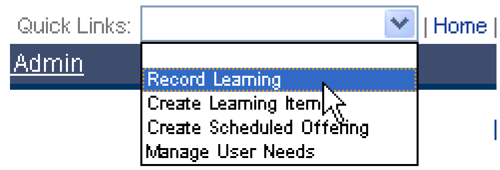
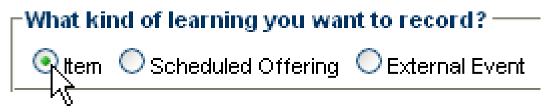
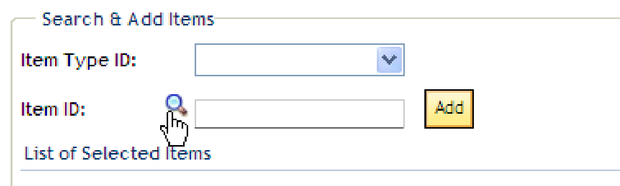
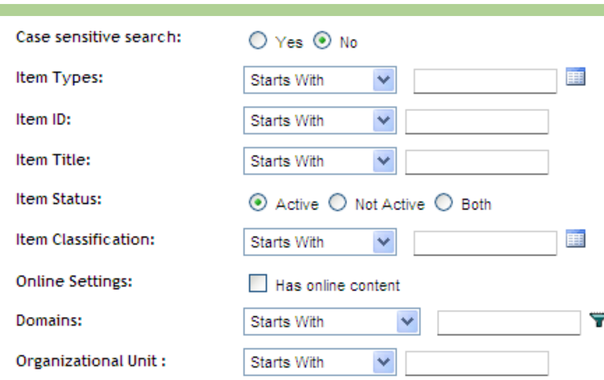
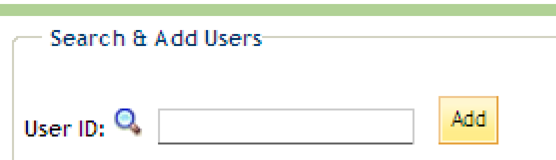
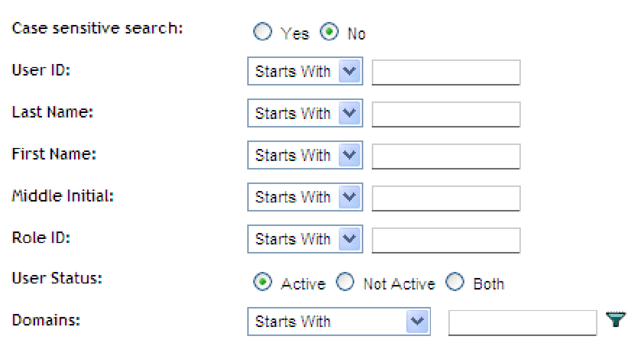
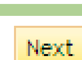
Record a Learning Event for an Item

Notes	Step	Activity	View
	37.	Review the **Step 7**: **Record Event** screen.	
Tell students that this now appears on the "Learner's" Student Transcript.	**38.**	Click **Finish**.	
Direct students to **Edit a Learning Event** to verify that the event was recorded, make edits, and apply the changes.	**39.**	Review the **Finished** screen. **Tip**: Click **Start Over…** to begin recording another Learning Event with the same list of Users.	

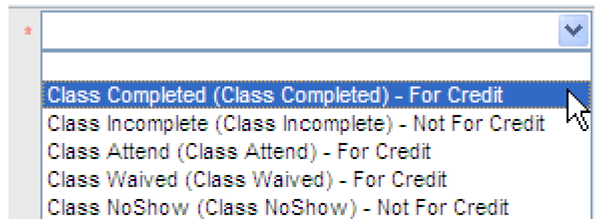
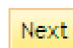
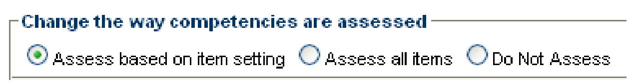
Tip: To avoid data formatting errors, use the Calendar and Selection icon assistants.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

Record a Learning Event for an Item via the Quick Links Wizard

Step	Activity	View
1.	Select **Record Learning** from the Quick Links menu at the top of the screen.	
2.	Select **Item** in **What kind of learning do you want to record?**	
3.	In the **Search & Add Items Box**, click the **Search** icon next to **Item ID**.	
4.	Search for and add the Item(s) you wish to give credit for in the resulting pop-up box.	
5.	In the **Search & Add Users** box, click the **Search** icon next to **User ID**.	
6.	Search for and add the User(s) to whom you wish to give credit in the resulting pop-up box.	
7.	Click **Next**.	

The screen is misaligned here and seems to indicate that a Grade is required. Only the Completions Status is required here, the Grade is not.

<table>
<tr><th colspan="3">Record a Learning Event for an Item via the Quick Links Wizard</th></tr>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>8.</td><td>Edit the Completion Date, if necessary.</td><td>
</td></tr>
<tr><td>9.</td><td>Complete the Grade/Completion box and edit any of the other fields, as necessary.
(The example shown is for a classroom Item; the pull-down choices will vary.)</td><td>
</td></tr>
<tr><td>10.</td><td>Click Apply Changes. (You may have to scroll to the right to see it.)</td><td>
</td></tr>
<tr><td>11.</td><td>Click Next.</td><td>
</td></tr>
<tr><td>12.</td><td>Choose whether you want AgLearn to assess competencies based on each Item's individual settings, assess all Items, or not to assess any competencies.</td><td>
</td></tr>
<tr><td>13.</td><td>Verify the accuracy of the data.</td><td>
</td></tr>
<tr><td>14.</td><td>Click Submit.</td><td>
</td></tr>
</table>

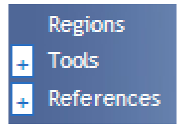
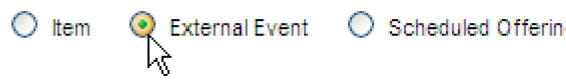
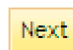
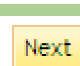
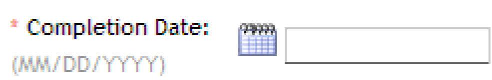
Notes

Complete definitions of terms are included in the glossary.

You can also add a Learning Event by clicking the **Add New** link on the **Learning Event Editor** search screen which will automatically display the **Learning Event Recorder**.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

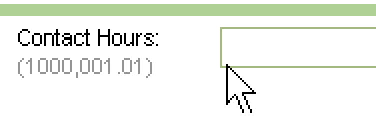
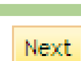
Record a Learning Event for an External Event

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Tools** from the left menu.	
3.	Select **Learning Event Recorder**.	
4.	Select the **External Event** option.	
5.	Click **Next**.	
6.	Enter a description of the event in the **Description** field.	
7.	Click **Next**.	
8.	Type in the **Instructor's** name, if known.	
9.	Enter the default grade in the **Default Grade** field. **Note**: The default grade can be numeric or ratings-based.	
10.	Click the **Completion Date** selection icon to select and enter a completion date. **Note**: The default entry for this field is the date on which the event is recorded.	
11.	Enter the completion time in the **Completion Time** field. **Note**: The default entry for this field is time at which the event is recorded.	

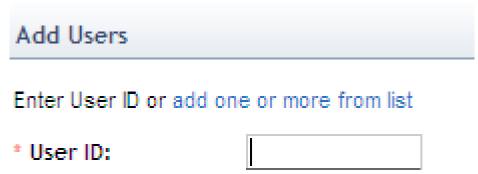
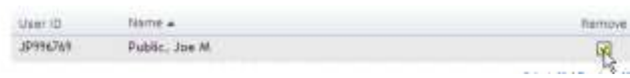
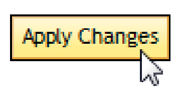
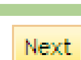
Notes

Inform students that for the purposes of this training cost is not being addressed and as such they should not enter any information in the **Default Price ($)** field.

Record a Learning Event for an External Event

Step	Activity	View
12.	Click the **Time Zone** selection icon to search for and enter a time zone. **Note**: The default entry for this field is obtained from the Item record.	
13.	Enter the Default Price in the **Default Price** field, if applicable.	
14.	Enter the number of hours in the **Total Hours** field. **Note**: **Total Hours** is the total number of hours that the resources for the Item were in use.	
15.	Enter the total number of credit hours that the Users will receive for completing this Item in the **Credit Hours** field. **Note**: **Credit Hours** indicates the number of unit hours printed on a Certificate (i.e., number of CEUs, CMEs, etc.).	
16.	Enter the number of contact hours for the Item in the **Contact Hours** field. **Note**: **Contact Hours** are the total number of hours that the Users actually spent on this Item.	
17.	Enter the CPE credits in the **CPE** field. **Note**: **CPE** shows the total number of credits for professional education hours that the Users will receive for completing this Item.	
18.	Click **Next**.	

Record a Learning Event for an External Event

Notes	Step	Activity	View
	19.	Select the **Add one or more from list** link to search for and enter Users.	
	20.	On the **> Search** screen, enter the appropriate search criteria.	
	21.	On the **Results** tab, select the **Add** check box next to each User to be added to the Learning Event.	
	22.	Click **Add**.	
	23.	Scroll down to the **Edit Selected Users** section.	
	24.	Select the **Remove** check box corresponding to those Users that need to be removed.	
	25.	Click **Apply Changes**.	
The Remove check box is a way to modify the selected list of learners identified on the previous screen. Skip the step if no changes need to be made.	**26.**	Click **Next**.	
	27.	Enter grades and comments, where appropriate.	
	28.	Click **Next**.	

Notes

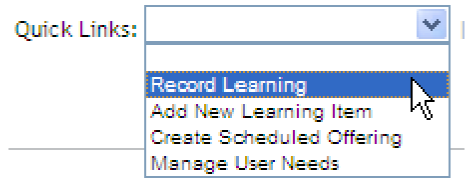
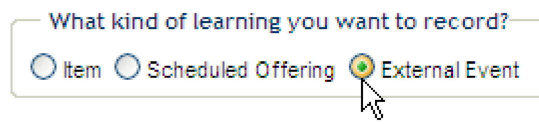
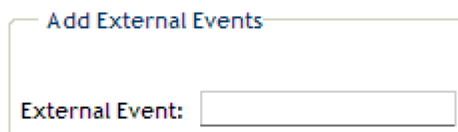
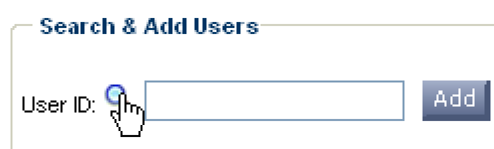
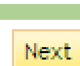
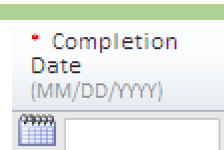
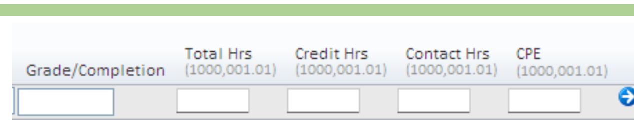
Record a Learning Event for an External Event

Notes	Step	Activity	View
	29.	Click **Next** to skip the **Step 6**: **Edit User Event Financial Information** screen.	
	30.	Review the **Step 7**: **Record Event** screen.	
	31.	Click **Finish**.	
The Item now appears in the User's Completed Work	**32.**	Review the **Finished** screen. **Tip**: Click **Start Over…** to begin recording another Learning Event using the same list of Users.	

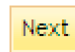
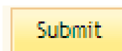
Tip: To avoid data formatting errors, use the Calendar and Selection icon assistants.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

Record an External Learning Event via the Quick Links Wizard

Step	Activity	View
1.	Select **Record Learning** from the Quick Links menu at the top of the screen.	
2.	Select **External Event** in **What kind of learning do you want to record?**	
3.	Type a description of the external event.	
4.	Click **Add**. Repeat Steps 3 and 4 as necessary.	
5.	In the **Search & Add Users** box, click the **Search** icon next to **User ID**.	
6.	Search for and add the User(s) you wish to give credit to in the resulting pop-up box.	
7.	Click **Next**.	
8.	Edit the **Completion Date**, if different.	
9.	Complete the **Grade/Completion** box and edit any of the other fields, as necessary.	

Record an External Learning Event via the Quick Links Wizard

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>10.</td><td>Click Apply Changes. (You may have to scroll to the right to see it.)</td><td>
</td></tr>
<tr><td>11.</td><td>Click Next.</td><td>
</td></tr>
<tr><td>12.</td><td>Verify the accuracy of the data.</td><td>
</td></tr>
<tr><td>13.</td><td>Click Submit.</td><td>
</td></tr>
</table>

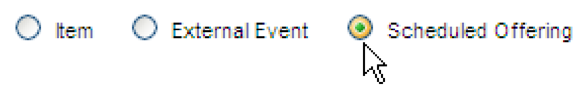
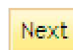
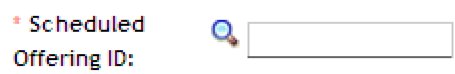
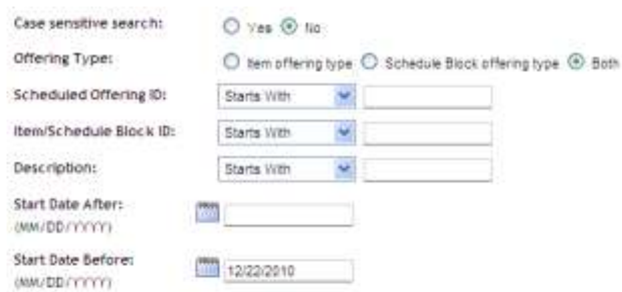
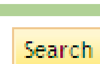
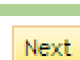
Notes

Complete definitions of terms are included in the glossary.

Inform students that they can also add a Learning Event by clicking the **Add New** link on the **Learning Event Editor** search screen which will automatically display the **Learning Event Recorder**.

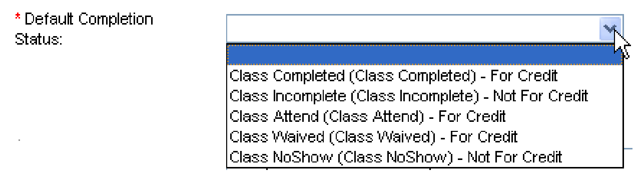
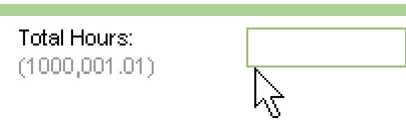
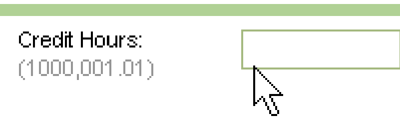
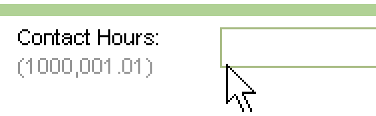
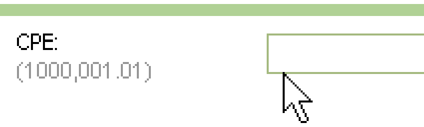
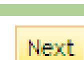
Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

Record a Learning Event for a Scheduled Offering

Step	Activity	View
1.	Select the **User Management** menu.	
2.	Select **Tools** from the left menu.	
3.	Select **Learning Event Recorder**.	
4.	Select the **Scheduled Offering** option.	
5.	Click **Next**.	
6.	Click the **Scheduled Offering** Search icon to search for and enter a Scheduled Offering.	
7.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
8.	Click **Search**.	
9.	On the **Results** tab, select the desired Scheduled Offering's corresponding **Select** link to add the Scheduled Offering.	
10.	Click **Next**.	
11.	Enter the name of the instructor in the **Instructor** field or use the Search icon to search for and enter the name of the instructor.	

Notes

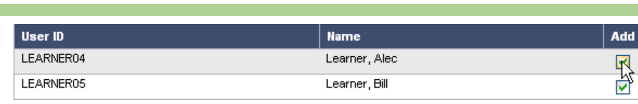
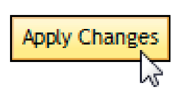
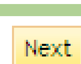
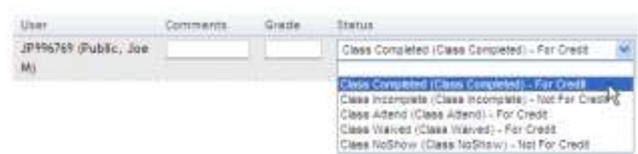
Record a Learning Event for a Scheduled Offering

Step	Activity	View
12.	Enter the default grade in the **Default Grade** field. **Note**: The default grade should be a percentage.	
13.	Select the default completion status from the **Default Completion Status** drop-down list.	
14.	Enter the number of hours in the **Total Hours** field. **Note**: **Total Hours** is the total number of hours that the resources for the Item were in use.	
15.	Enter the total number of credit hours that the Users will receive for completing this Item in the **Credit Hours** field. **Note**: **Credit Hours** is the number of unit hours printed on a Certificate (i.e., number of CEUs, CMEs, etc.).	
16.	Enter the number of contact hours for the Item in the **Contact Hours** field. **Note**: **Contact Hours** is the total number of hours that the Users actually spent on this Item.	
17.	Enter the CPE credits in the **CPE** field. **Note**: **CPE** is the total number of credits for professional education hours that the Users will receive for completing this Item.	
18.	Click **Next**.	

Tell students that for the purposes of this training cost is not being addressed and as such they should not enter any information in the **Default Price ($)** field.

Notes

Record a Learning Event for a Scheduled Offering

Step	Activity	View
19.	Select the **Add one or more from list** link to search for and enter Users.	
20.	On the **> Search** screen, enter the appropriate search criteria.	
21.	On the **Results** screen, select the **Add** check box next to each User to be added to the Learning Event.	
22.	Click **Add**.	
23.	Scroll down to the **Edit Selected Users** section.	
24.	Select the **Remove** check box next to each User to remove the User from the Learning Event.	
25.	Click **Apply Changes**.	
26.	Click **Next**.	
27.	Enter grades and comments for each User and select the appropriate status for each User from the corresponding **Status** drop-down list.	
28.	Click **Next**.	

Notes

Record a Learning Event for a Scheduled Offering

Step	Activity	View
29.	Click **Next** to skip the **Step 6**: **Edit User Event Financial Information** screen.	
30.	Review the **Step 7**: **Record Event** screen.	
31.	Click **Finish**.	
32.	Review the **Finished** screen. **Tip**: Click **Start Over…** to begin recording another Learning Event with the same list of Users. **Tip**: Click **Print** to print the completion certificates for each User in the list. **Tip**: Click **Email…** to Email the completion certificates to each User on the list.	

Tell students that this now appears on the "Learner's" Student Transcript.

Tip: To avoid data formatting errors, use the Calendar and Selection icon assistants.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

Record a Learning Event for a Scheduled Offering via the Quick Links Wizard

<table>
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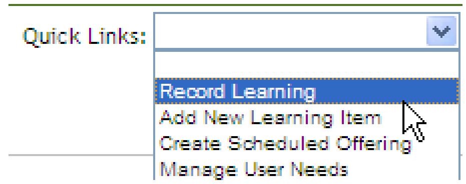
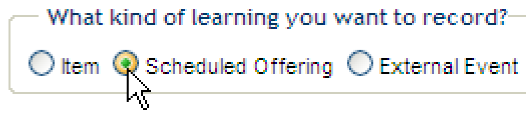
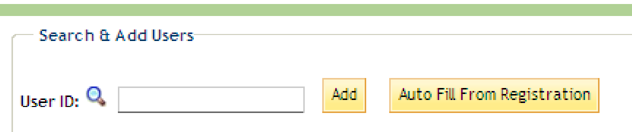
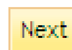
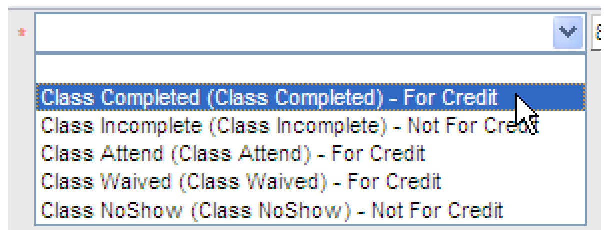
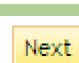
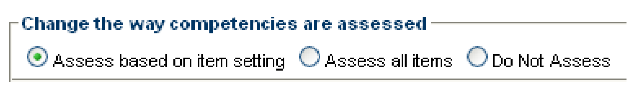
<tr><td>1.</td><td>Select Record Learning from the Quick Links menu at the top of the screen.</td><td>
</td></tr>
<tr><td>2.</td><td>Select Scheduled Offering in What kind of learning do you want to record?</td><td>
</td></tr>
<tr><td>3.</td><td>In the Search & Add Offerings Box, click the Search icon next to Scheduled Offering ID.
(If you know the numeric ID of the Scheduled Offering, you may type it directly in the box, and click Add.)</td><td>
</td></tr>
<tr><td>4.</td><td>Search for and add the scheduled offering(s) for which you wish to give credit in the resulting pop-up box.</td><td>
</td></tr>
<tr><td>5.</td><td>In the Search & Add Users box, click the Search icon next to User ID.
(If you want AgLearn to automatically populate the class roster for you to edit as needed, click Auto Fill From Registration.)</td><td>
</td></tr>
</table>

Record a Learning Event for a Scheduled Offering via the Quick Links Wizard

Step	Activity	View
6.	Search for and add the User(s) to whom you wish to give credit in the resulting pop-up box.	
7.	Click **Next**.	
8.	Complete the **Grade/Completion** box and edit any of the other fields, as necessary.	
9.	Click **Apply Changes**. (You may have to scroll to the right to see it.)	
10.	Click **Next**.	
11.	Choose whether you want AgLearn to assess competencies based on each Item's individual settings, assess all Items, or not to assess any competencies.	
12.	Verify the accuracy of the data.	
13.	Click **Submit**.	

Reports

After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

AgLearn data can be displayed and printed by running a report. AgLearn provides many different report options, each of which offers various grouping, sorting, format and print options.

Reports are accessed in a very different fashion from previous versions of AgLearn. The Reports menu has been enhanced with new browse and search functionality. A search window allows admins to search across all the report categories to find the desired report. They can also search for reports on the admin side or the user side, or both. Saved Reports are easily available on the Saved Reports tab and scheduled report jobs can be accessed via the Report Jobs tab.

The report subtasks chosen to illustrate typical report activity steps are the **Run a Class Roster Report**, **Run a Certificate of Completion Report**, **Run a Compliance Report**, and **Run a Deficiency Report**.

A Day-in-the-Life Scenario

A mandatory Workplace Violence Workshop is being offered tomorrow. You have been asked to provide the instructor with a roster of all registrants. Once the workshop is completed, you will need to print a certificate of completion for each attendee. Next week, you will need to generate a compliance report that identifies the percentage of employees who have completed this mandatory workshop.

Notes

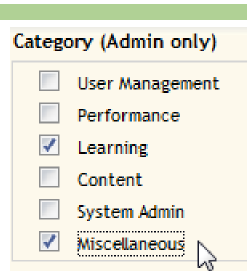
Run a Scheduled Offering Roster Report

Step | **Activity** | **View**

Complete definitions of terms are included in the glossary.

1. Select the **Reports** menu tab.

2. Select the Learning and Miscellaneous report categories.



3. Enter **Roster** in the Report Search Window.

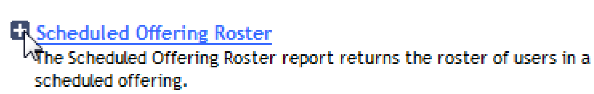
Remind students that not all reports are accessible by all roles.

4. Click **Submit**.

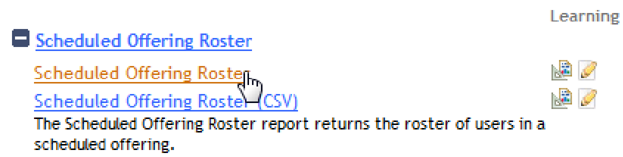
There are also a number of custom reports available for rosters.

5. Scroll through the list of reports to find the **Scheduled Offering Roster** report.

6. Expand the group of reports available.



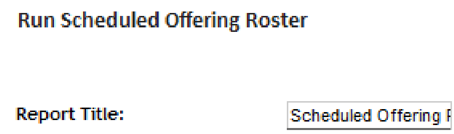
7. Select the report format you wish to run.



Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

8. Enter a report title in the **Report Title** field.

Note: The **Report Title** default is set to display the name of the actual report.

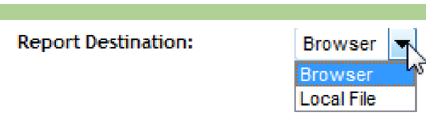


9. Enter a header and footer for the report in their respective fields.

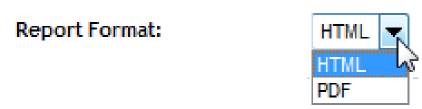
Note: **Report Header** and **Footer** do not have a default setting.

Browser is the default selection, and when selected, it displays the report within the browser. **Local File** saves the report to your computer.

10. Select either the **Browser** or **Local File** view option to select a report destination.

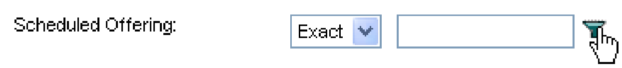


11. Select either HTML or PDF as the **Report Format**.

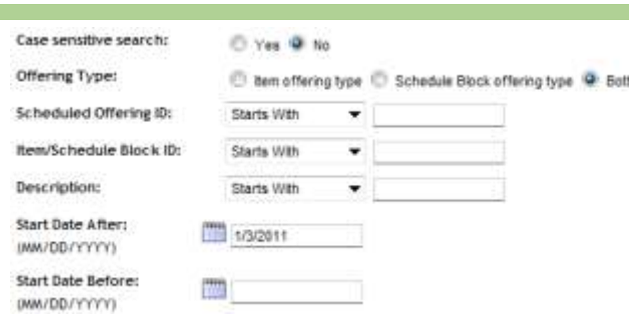


If known, scheduled offering IDs can be entered directly into the appropriate field.

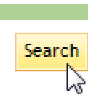
12. Click the **Filter** icon to search for and select a Scheduled Offering.



13. On the **Create** Filter tab, enter the appropriate criteria for filtering the Scheduled Offering request.

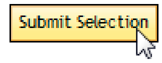


14. Click **Search**.



15. Click the **Select** check box corresponding to the appropriate Scheduled Offering(s).

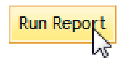
16. Click **Submit Selection**.



17. Verify that you've selected the desired offering, and then click **Submit Filter**.

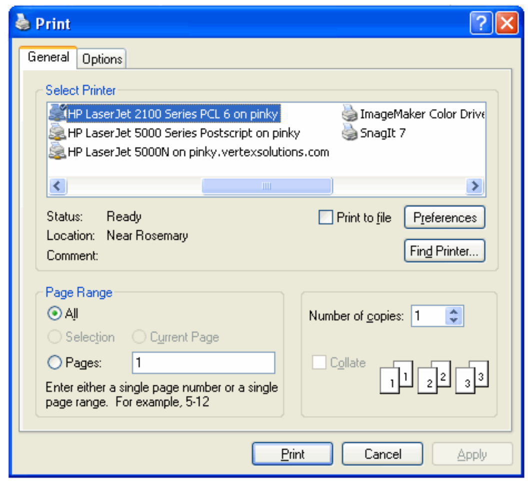
If the number of records in the report exceeds the predefined threshold, you'll be directed to a **Schedule Job** screen in order to specify a date and time to run the report as a background job.

18. On the **Scheduled Offering Roster** screen, click **Run Report** to display the report.



19. To Print the report, press **Ctrl+P**, then **Print** for HTML formats.

Note: For PDF formats, simply click the Print icon.



Note: For additional information about scheduling a background job, see **Scheduling a Background Job**.

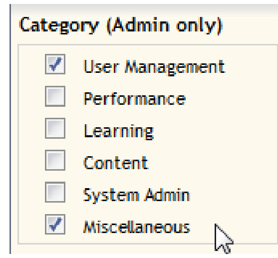
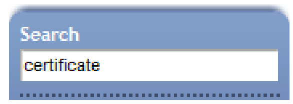
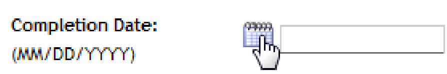
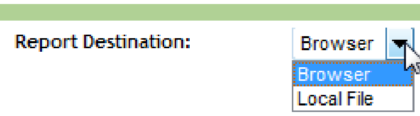
Notes

Complete definitions of terms are included in the glossary.

By selecting the Miscellaneous category, you will always see any custom reports that may have been developed with a similar title.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

Run a Certificate of Completion for Offerings Report

Step	Activity	View
20.	Select the **Reports** menu tab.	
21.	Select **User Management** and **Miscellaneous** from the Category menu.	
22.	Enter **Certificate** in the Report Search Window.	
23.	Click **Submit**.	
24.	Scroll through the list of reports to find the **Certificate of Completion for Offerings** report.	
25.	Select the report title.	
26.	Enter a report title in the **Report Title** field. **Note**: The **Report Title** default is set to display the name of the actual report.	
27.	Enter the name of the instructor in the **Signature Text** field.	
28.	Click the Calendar icon to enter the completion date.	
29.	Select either the **Browser** or **Local File** view option to select a report destination.	

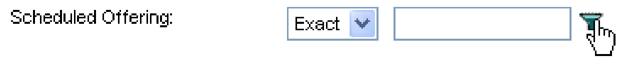
Notes

Run a Certificate of Completion for Offerings Report

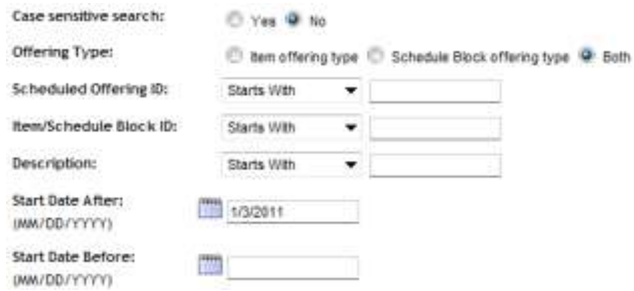
Step | **Activity** | **View**

30. Select either HTML or PDF as the **Report Format**.

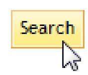
31. Click the **Filter** icon to search for and select a Scheduled Offering.



32. On the **Create Filter** tab, enter the appropriate criteria for filtering the Scheduled Offering request.

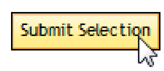


33. Click **Search**.



34. Select the **Select** check box corresponding to the appropriate Scheduled Offering(s).

35. Click **Submit Selection**.



36. Verify that you've selected the desired offering, and then click **Submit Filter**.

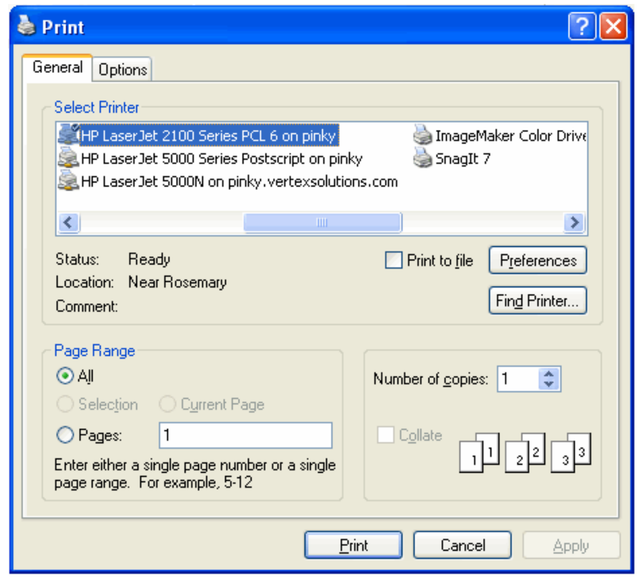
37. On the **Run Certificate of Completion** screen, click **Run Report** to display the report.

if the number of records in the report exceeds the predefined threshold, they will be directed to a **Schedule Job** screen in

Notes

order to specify a date and time to run the report as a background job.

Run a Certificate of Completion for Offerings Report

Step	Activity	View
38.	To Print the report, press **Ctrl+P**, then **Print** for HTML formats. **Note:** For PDF formats, simply click the Print icon.	
39.	Click **Print** to print the report.	

Note: For additional information about scheduling a background job, see **Scheduling a Background Job**.

Notes

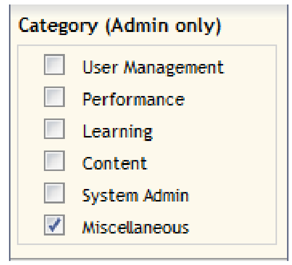
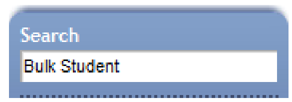
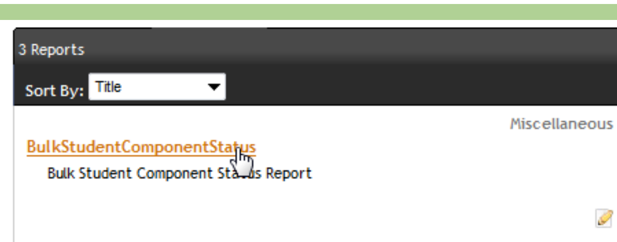
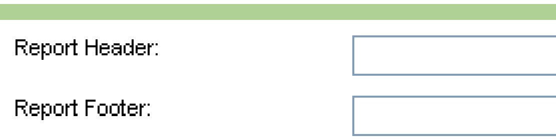
Complete definitions of terms are included in the glossary.

By selecting the Miscellaneous category, you will always see any custom reports that may have been developed with a similar title.

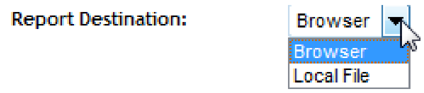
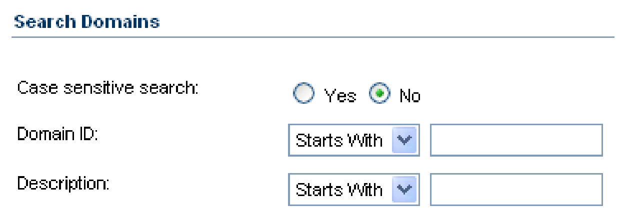
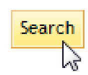
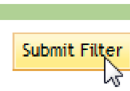
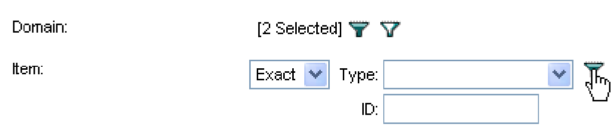
Remind students that not all reports are accessible by all roles.

Remind students that the number and type of reports a user is allowed to access will vary depending upon the user's permissions within the LMS.

Run a Bulk Student Component Status Report

Step	Activity	View
40.	Select the **Reports** menu.	
41.	Select **Miscellaneous** from the Category menu.	
42.	Enter **Bulk Student** in the Report Search Window.	
43.	Click **Submit**.	
44.	Scroll through the list of reports to find the **Bulk Student Component Status** report.	
45.	Select the Report title.	
46.	Enter a report title in the **Report Title** field. **Note**: The Report Title default is set to display Student Component Status Report.	
47.	Enter a header and footer for the report in their respective fields. **Note**: The **Report Header** and **Footer** do not have a default setting.	

Run a Bulk Student Component Status Report

Notes	Step	Activity	View
Browser is the default selection and when selected, it displays the report within the browser. Local File saves the report to your computer.	48.	Click either the **Browser** or **Local File** report destination from the drop-down list.	
	49.	Select either **HTML** or **PDF** as the Report Format.	
	50.	Select the **Filter** icon to search for a Domain.	
	51.	On the **Create Filter** tab, enter the appropriate criteria for filtering the User request.	
	52.	Click **Search**.	
	53.	Select the **Select** check box corresponding to the appropriate domain(s).	
	54.	Click **Add to Filter**.	
You can select the **Remove** check box corresponding to any Domain to be removed from the filter.	55.	On the **Edit Domain Results** screen, verify that you have selected the proper domains.	
	56.	Click **Submit Filter**.	
	57.	Select the **Filter** icon to search for an Item. **Note**: The Domain **Select from list** link indicates you have already selected a number of domains in this filter.	

Notes

Run a Bulk Student Component Status Report

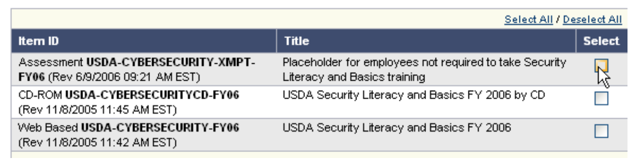
Step | **Activity** | **View**

58. Follow standard search procedures to select the Item(s) of your choice.

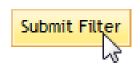
Note: See **Managing Data Entry and Searches** for more detailed information.

59. Click **Search**.

60. Click the **Select** check box corresponding to the appropriate Item(s).

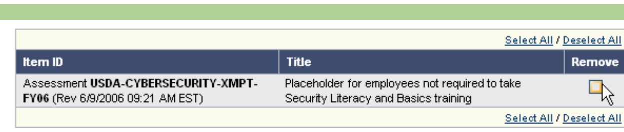


61. Click **Submit Filter**.



62. On the **View Item Results** screen, verify that you have selected the proper Items.

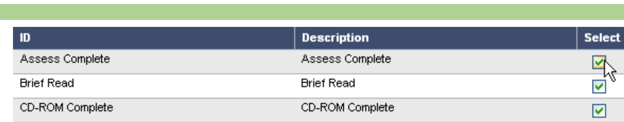
You can select the **Remove** check box corresponding to any Item to be removed from the filter.



63. Click **Submit Filter**.

64. Select the **Select from list** icon to search for a Completion Status.

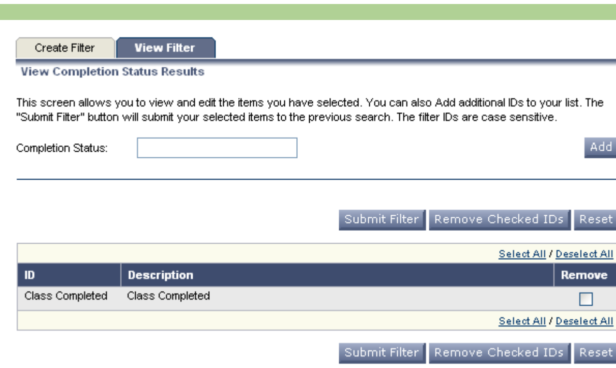
65. On the **Create Filter** tab, click the **Select** check box corresponding to the appropriate completion status.



66. Click **Submit Selection**.

67. On the **View Filter** tab, select the **Remove** check box corresponding to any completions status to be removed from the filter.

Note: This step is performed only if you want to remove a compliance status from the filter.



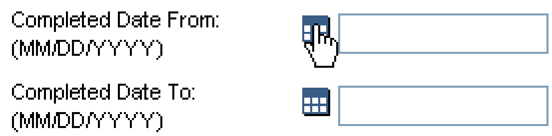
Notes

Run a Bulk Student Component Status Report

Step | **Activity** | **View**

68. Click **Submit Filter**.

69. Click the Completed Date **Calendar** icons to select and enter the dates between which you want training compliance information on your report.

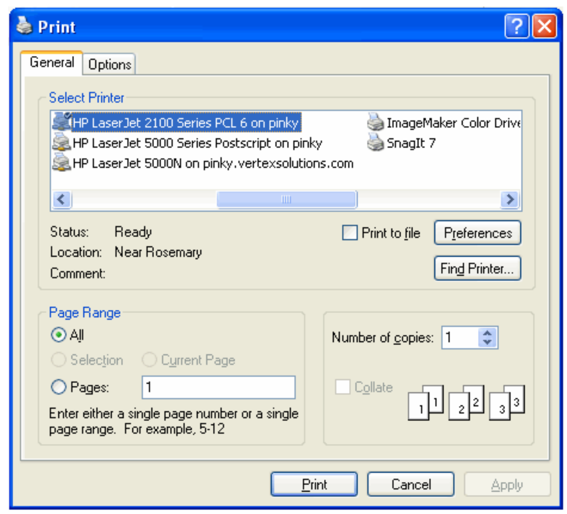


The report may take a few minutes to run. If the report does not display, try running the report again or see your AgLearn Lead.

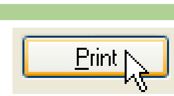
70. On the **Run User Item Status Report** screen, click **Run Report** to display the report.

Inform students that the LMS-Glossary includes complete definitions of LMS terms.

71. Use **Ctrl+P** to open the **Print Dialog** box.



72. Click **Print** to print the report.



Note: For additional information about scheduling a background job, see **Scheduling a Background Job**.

Notes

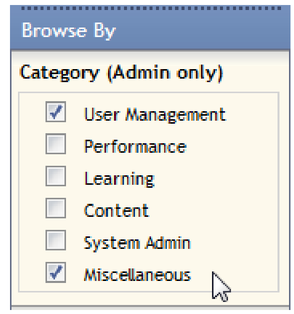
Run a Completed Work Report

Step | **Activity** | **View**

Complete definitions of terms are included in the glossary.

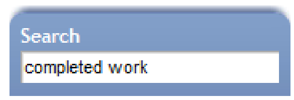
73. Select the **Reports** menu.

74. Select both the **User Management** and Miscellaneous category from the Category menu.



Remind students that not all reports are accessible by all roles.

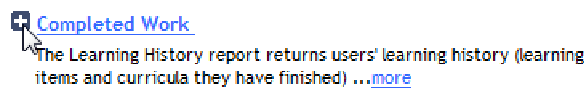
75. Enter **Completed Work** in the Report Search Window.



76. Click **Submit**.

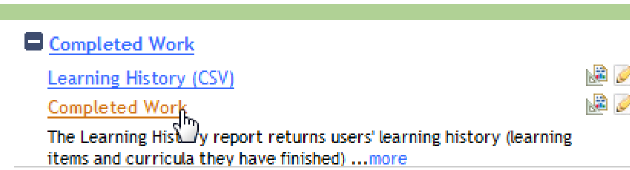
Your search will also produce the Completed Work Legacy report. This report will eventually be removed from the available listings.

77. Click the **+** to expand the options for the **Completed Work** report.



The CSV option will produce date in a CSV format, which can be used with Excel to further analyze data. The other option produces results in browser or PDF format.

78. Select the type of report you wish to run.



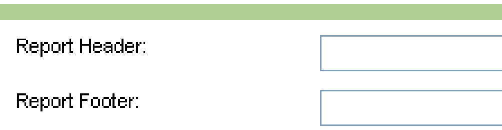
The title of this report retains the legacy title of Learning History. You may want to change the title to Completed Work.

79. Enter a report title in the **Report Title** field.

Note: The **Report Title** default is set to display the name of the legacy report.

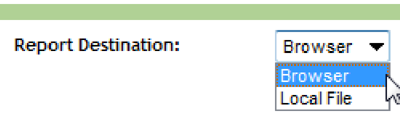
Note: Report Header and Footer do not have a default setting.

80. Enter a header and footer for the report in their respective fields.



Browser is the default selection and displays the report within the browser. Local File saves the report as a file on your computer.

81. Select either the **Browser** or **Local File** option for your report destination.



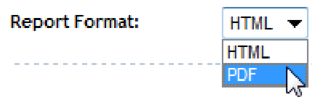
Notes

Run a Completed Work Report

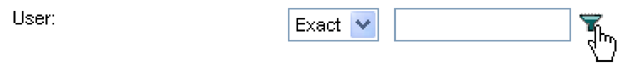
Step	Activity	View

The Report Format default is set to HTML with the Mask User IDs check box selected and the Page Break Between Records checkbox unselected.

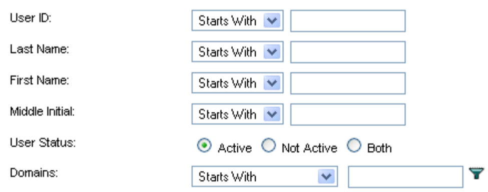
82. Select a **Report Format** option to change the report format.



83. Select the **Filter** icon to search for a User.

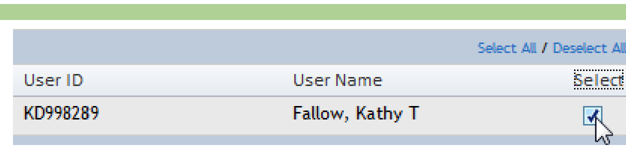


84. On the **Create Filter** tab, enter the appropriate criteria for filtering the User request.



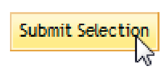
85. Click **Search**.

86. Click the **Select** check box corresponding to the appropriate User(s).



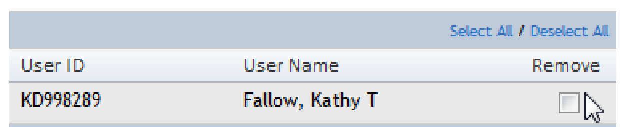
Learner IDs can be entered directly into the appropriate field. However, it may be easier to select the scheduled offering(s) from a list, since the IDs may be difficult to memorize.

87. Click **Submit Selection**.



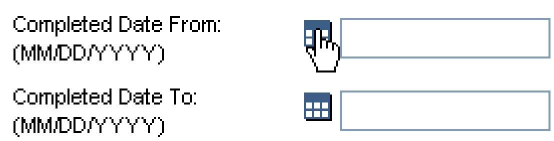
88. On the **View Filter** tab, select the **Remove** check box corresponding to any User to be removed from the filter.

Note: This step is performed **only** if you want to remove some of the Users in the filter.



89. Click **Submit Filter**.

90. Click the Completed Date **Calendar** icons to select and enter the dates between which you want training deficiency information on your report.



Notes

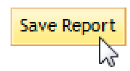
Run a Completed Work Report

Step | **Activity** | **View**

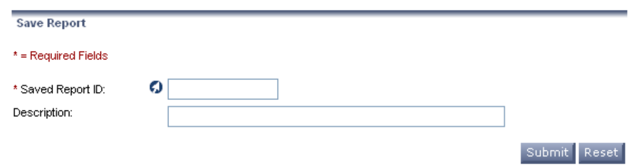
91. Click the **Detail** radio button if a detailed report is desired.

Note: The Summary button is checked by default.

92. If this is a frequently-run report, click **Save Report**.



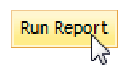
93. Fill in a **Saved Report ID** and **Description**.



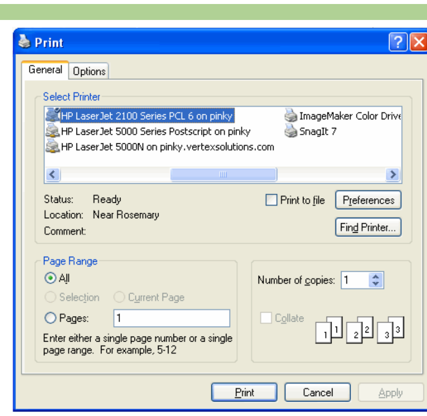
94. Click **Submit**.

Note: The report may take a few minutes to run. If the report does not display, try running the report again or see your Supervisor.

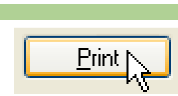
95. Click **Run Report** to display the report.



96. Use **Ctrl+P** to open the **Print Dialog** box.



97. Click **Print** to print the report.



Note: For additional information about scheduling a background job, see **Scheduling a Background Job**.

Scheduling Background Jobs

After introducing the task via the Overview, highlight the roles assigned to perform each task.

Reinforce the notion that based on the student's role, the tasks available for scheduling as background jobs vary.

The Learner Needs Management Assistant is available through the Learner Management menu.

The **Item Revision Assistant** is accessed by selecting **Revise…** when editing an Item.

Tasks that can be time-consuming, include too many records, or dramatically affect system performance should be run as background jobs. **Background jobs** are tasks that are scheduled to run at off-peak work hours, where they can be performed without overloading the system.

Background jobs are scheduled for the tasks available through the **User Needs Management Wizard**, the **Item Revision Wizard**, and for system **Reports**.

Background job scheduling tasks include **View** and **Schedule a Background Job.**

Note: Scheduling a background job is performed during the final step of specific tasks, when both the **Run Job Now** and **Schedule Job** buttons appear.

The tasks available for scheduling as background jobs through the **User Needs Management Assistant** can include: **Add and Remove Curricula**, **Add and Remove Items**, **Add and Remove Competency Profiles**, **Add and Remove Competencies**, **Add Job-related Curricula**, and **Add Job-related Competency Profiles**. See **User Needs Management Assistant** for more detailed information on performing these tasks.

Background jobs can also be scheduled for revising Items, through the **Item Revision Assistant**. See **Managing Items** for more detailed information on using the Item Revision Assistant.

The reports available through the **Reports** menu may be scheduled as background jobs. See **Reports** for more detailed information on running reports.

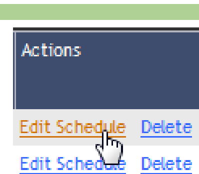
A Day-in-the-Life Scenario

Your supervisor has requested to see an Instructor Data report of all active instructors currently assigned to teach Items through AgLearn. He has asked for a printed copy by next Thursday, aware that running the report would be a burden on the system during peak work hours.

Notes

Background jobs viewed via this procedure are jobs that are still in queue, they have not yet been run.

View a Background Report Job

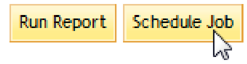
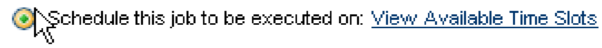
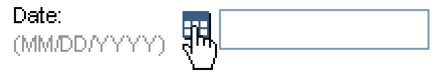
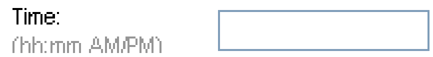
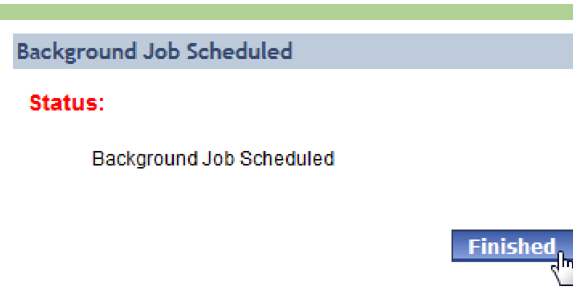
Step	Activity	View
1.	Select the **Reports** menu tab.	
2.	Select the **Report Jobs** tab.	
3.	Locate the desired background report job.	
4.	Select the corresponding **Edit Schedule** link to view more information.	

Notes

Background Jobs must be scheduled to run between Midnight and 5 AM during the week or any time on a Saturday or Sunday. To see all of the available time slots, click the View Available Time Slots corresponding link shown in Step 2.

Email the Report check box only applies to background jobs for reports that have a Report Destination of **Local File** and a Report Format of **CSV** or **PDF**

Schedule a Report to run as a Background Job

Step	Activity	View
1.	When creating a report, click **Schedule Job**.	
2.	Select the **Schedule this job to be executed on** option button.	
3.	Click the **Date** Calendar icon to select and enter the date the background job will run.	
4.	Enter a **Time** for the background job to run.	
5.	Enter a brief description of the job in the **Job Description** field.	
6.	Select the **Notify via email upon completion** check box to send a notification e-mail.	
7.	Enter the recipient's e-mail address.	
8.	Select **Email the Report** to receive a copy of the report with the notification e-mail. **Note**: Your report should be a CSV or PDF format with a destination of Local File.	
9.	Click **Finish**.	
10.	Verify that the background job has been scheduled on the status screen, then click **Finished**. (See **View a Background Report Job**) to check your job's status.	

Managing Instructors

After introducing the task via the Overview, highlight the roles assigned to perform each task.

An instructor is any person who delivers learning. AgLearn tracks Instructors not only by name, location, and availability, but can keep records about which Items an instructor is authorized to teach. Subtasks pertaining to **Managing Instructors** are accessible from the **Instructors** menu. **Managing Instructors** tasks include: **View**, **Add**, **Edit**, **Delete**, and **Add Authorized Items to Instructors**, and **Remove Authorized Items from Instructors**.

A Day-in-the-Life Scenario

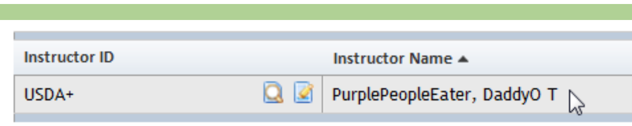
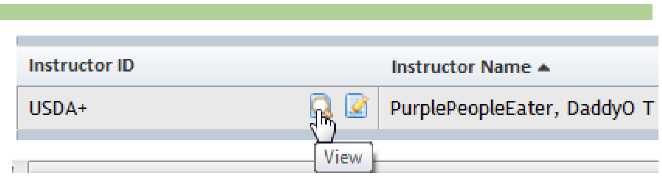
A new instructor has been hired. You need to:

- Add the instructor to AgLearn
- Add two (2) Items that the instructor has been authorized to teach

Notes

View an Instructor Record

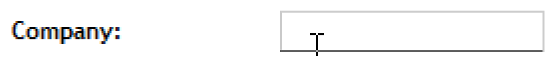
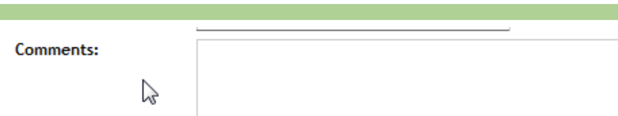
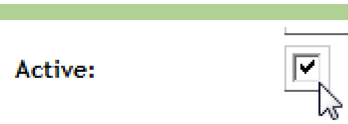
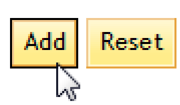
Complete definitions of terms are included in the glossary.

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Instructors**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** screen, locate the desired instructor.	
7.	Click the **View** link to view more information.	

Notes

Complete definitions of terms are included in the glossary.

Add an Instructor Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Instructors**.	
4.	Select the **Add New** link.	
5.	Enter the **Instructor ID**	
6.	Enter the instructor name.	
7.	Enter the instructor company, if known.	
8.	Click the **Domain** Selection icon to search for and enter a domain.	
9.	Click the **Organization** Selection icon to search for and enter an organization.	
10.	Enter an e-mail address.	
11.	Enter any comments in the **Comments** field.	
12.	Select the **Active** check box if the instructor has been designated as active.	
13.	Click **Add**.	

Notes

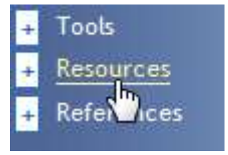
Edit an Instructor Record

Step | **Activity** | **View**

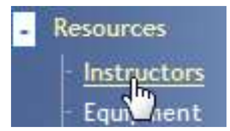
Complete definitions of terms are included in the glossary.

1. Select the **Learning** menu.

2. Select **Resources** from the left menu.



3. Select **Instructors**.

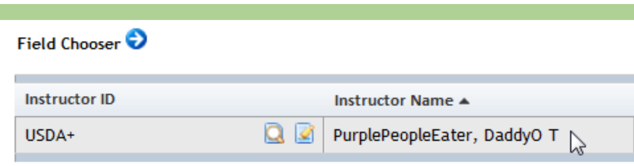


4. On the **> Search** screen, enter the appropriate search criteria.

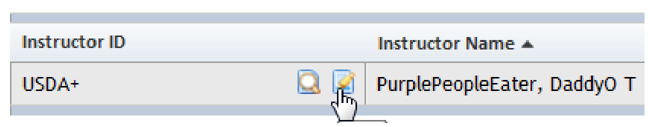
Note: See **Managing Data Entry and Searches** for more detailed information on searching.

5. Click **Search**.

6. On the **Results** tab, locate the desired instructor.



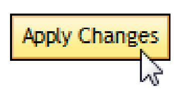
7. Click the corresponding **Edit** icon to edit the instructor information.



Inform students to make all necessary changes using the tabs available. However, caution them to click **Apply Changes** before selecting a different tab. Otherwise they will lose all their changes and modifications.

8. Make the appropriate changes and click **Apply Changes**.

Caution: Do not select a different tab prior to clicking **Apply Changes** or all changes and modifications will be lost.



Notes

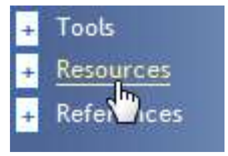
Instructors currently scheduled for any offering cannot be deleted. Remove any offerings the selected instructor is currently scheduled to teach before deleting the instructor record.

Delete an Instructor Record

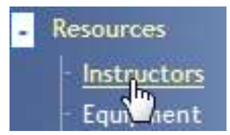
Step | **Activity** | **View**

1. Select the **Learning** menu.

2. Select **Resources** from the left menu.



3. Select **Instructors**.

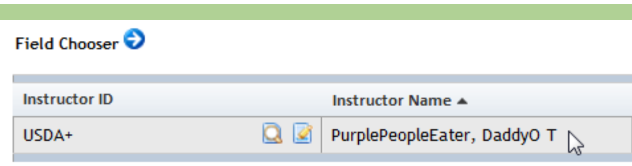


4. On the **> Search** screen, enter the appropriate search criteria.

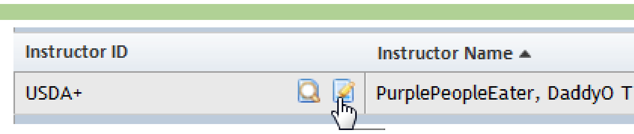
Note: See **Managing Data Entry and Searches** for more detailed information on searching.

5. Click **Search**.

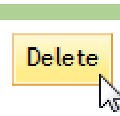
6. On the **Results** tab, locate the desired instructor.



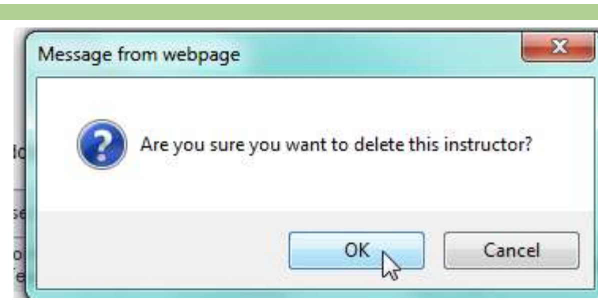
7. Click the **Edit** icon to edit the instructor information.



8. Click **Delete**.



9. Click **OK** in the **Confirmation** box.

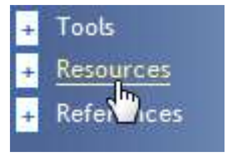
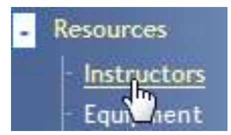
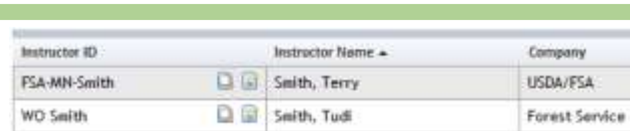
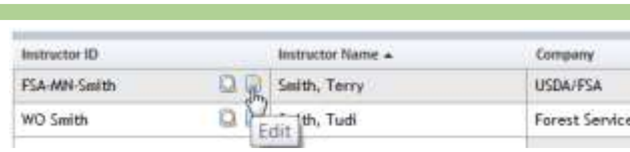
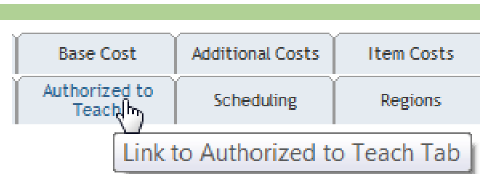
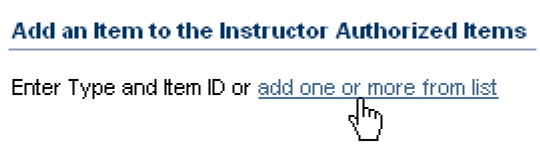


Notes

When adding a new instructor, the method presented here would be the most efficient way to identify all the Items the instructors is authorized to teach.
Existing instructors can also be added directly to the Item Record by selecting the Instructor tab and adding the authorized instructor by using the **Select from List** link.

You are not prevented from scheduling an instructor for an offering of an Item even if the instructor is not authorized to teach that Item.

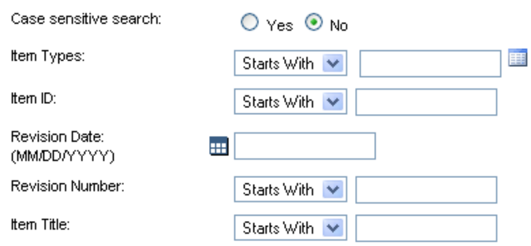
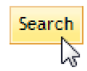
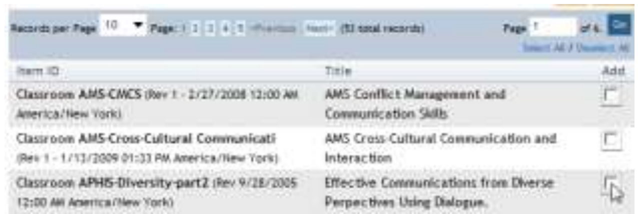
Add Authorized Items to Instructors

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Instructors**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** tab, locate the desired instructor.	
7.	Click the corresponding **Edit** icon to edit the instructor information.	
8.	Click the **Authorized to Teach** tab.	
9.	Select the **Add one or more from list** link, from the **Add an Item to the Instructor Authorized Items** section. **Caution**: Instructors can be scheduled to teach an Item even if they are not authorized to teach that Item.	

Notes

After selecting the add one or more from list link, the Item **> Search** screen appears.

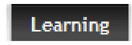
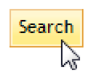
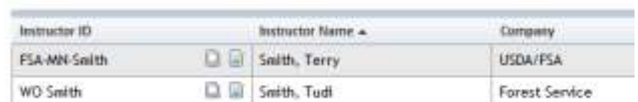
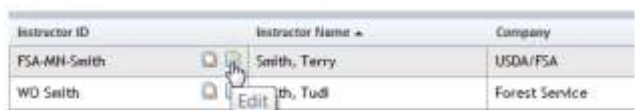
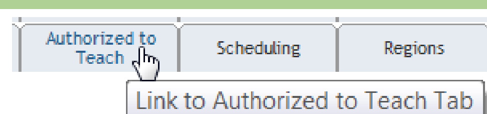
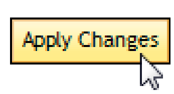
Add Authorized Items to Instructors

Step	Activity	View
10.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
11.	Click **Search**.	
12.	On the **Results** tab, locate the desired Item to add to the instructor.	
13.	Select the corresponding **Add** check box.	
14.	Click **Add**.	

Notes

Complete definitions of terms are included in the glossary.

Remove Authorized Items from Instructors

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Expand the **Resources** menu.	
3.	Select **Instructors**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** tab, locate the desired instructor.	
7.	Click the **Edit** icon to edit the instructor information.	
8.	Click the **Authorized to Teach** tab.	
9.	From the **Update the Authorized Items for the Instructor** section, locate the Item to be removed.	
10.	Select the corresponding **Remove** check box.	
11.	Click **Apply Changes**.	

Inform students that after selecting the **Authorized** tab, the **> Search > Search Results > Edit Authorized to Teach** screen appears.

After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing a Material Record

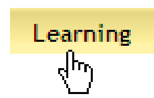
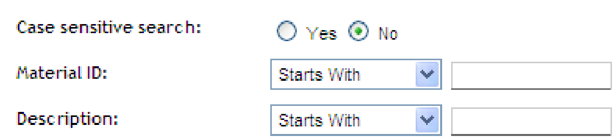
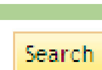
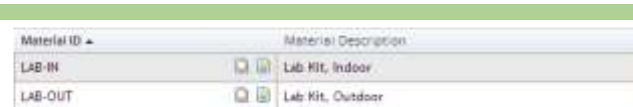
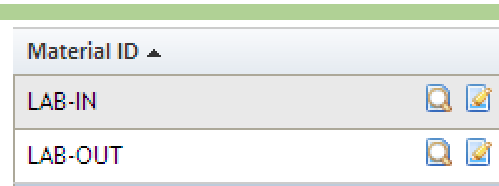
Materials are consumable supply Items used during learning (e.g., pens, handouts, giveaways, etc.). Subtasks pertaining to **Managing Materials** are accessible from the **Materials** menu. User-specific subtasks include the following: **View**, **Add**, **Edit**, **Copy**, and **Delete a Material Record**.

A Day-in-the-Life Scenario
As the week begins, you note the following:
Three classes were held last week. Total student enrollment in these classes was 78.
A box of supplies that includes 300 three-ring binders has just arrived.

Notes

View a Material Record

Complete definitions of terms are included in the glossary.

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Materials**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note:** See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** tab, locate the desired material.	
7.	Click the corresponding **View** link to view more information.	

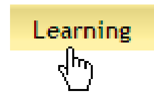
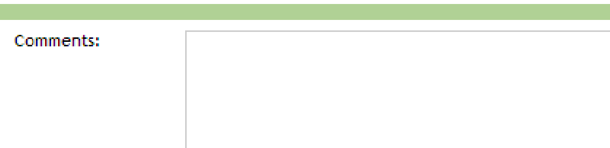
Inform students that they can also view information about material inventory, base cost, additional costs, and pricing from this screen.

Notes

Complete definitions of terms are included in the glossary.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

Add a New Material Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Materials**..	
4.	Select the **Add New** link.	
5.	Enter the **Material ID**.	
6.	Enter a material description in the **Description** field.	
7.	Click the **Domain** Search icon to search for and enter a domain.	
8.	Enter the revision number in the **Revision Number** field.	
9.	If applicable, enter comments in the **Comments** field.	
10.	Click **Add**. **Caution**: A **Validation Error** message will appear if all required fields are not complete.	

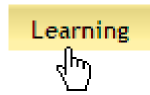
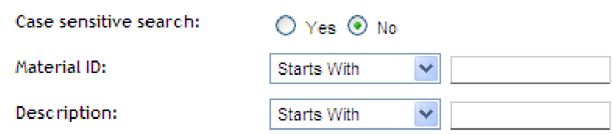
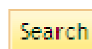
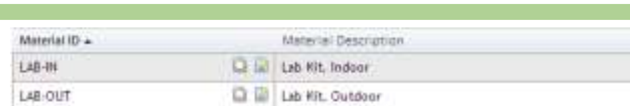
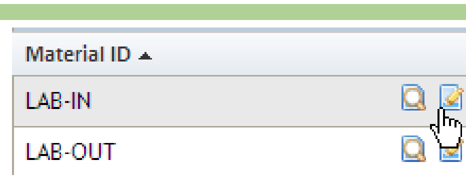
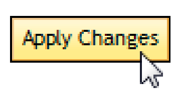
Note: For additional information about managing materials, see **Managing a Facility Record**, **Managing a Location Record**, **Managing Scheduled Offerings**, and **Managing Segments**.

Notes

Complete definitions of terms are included in the glossary.

Materials associated with a facility appear in the **Update the Inventory for the Materials** section.

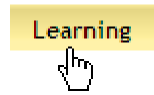
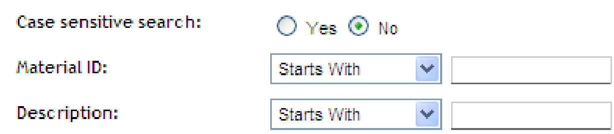
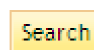
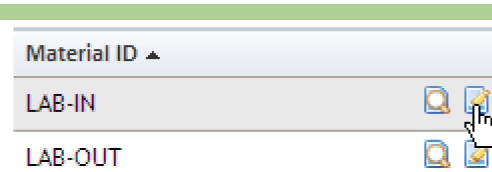
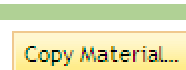
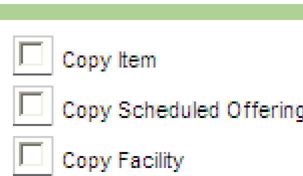
Edit a Material Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Materials**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** tab, locate the desired material.	
7.	Click the corresponding **Edit** icon to edit material information.	
8.	Make the appropriate changes and click **Apply Changes**.	
9.	Click the **Inventory** tab.	
10.	Make the appropriate changes and click **Apply Changes**.	

Notes

Complete definitions of terms are included in the glossary.

Copy a Material Record

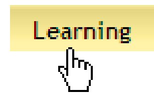
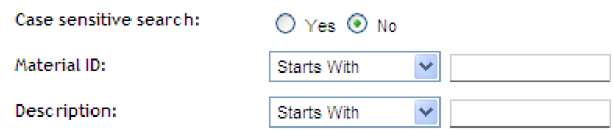
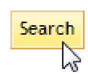
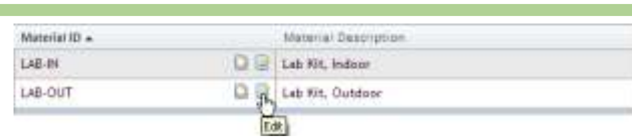
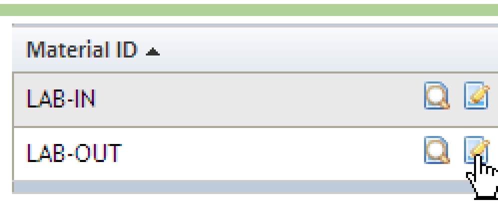
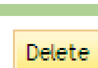
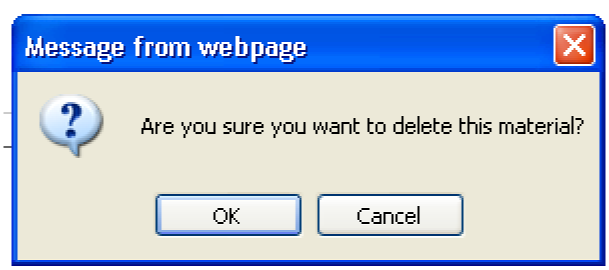
Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Materials**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** tab, locate the desired material.	
7.	Select the corresponding **Edit** icon.	
8.	Click **Copy Material**.	
9.	Enter the material ID of the newly copied material record in the **New Material ID** field.	
10.	Select the check boxes of the material record elements you want to copy.	
11.	Click **Copy**.	

Notes

Complete definitions of terms are included in the glossary.

f

Delete a Material Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Materials**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** screen, locate the desired material.	
7.	Click the corresponding **Edit** icon.	
8.	Click **Delete**.	
9.	Click **OK** in the **Confirmation** box. **Caution**: Be certain that the material selected should be deleted. If unsure, click **Cancel**.	

After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing Equipment

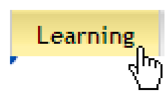
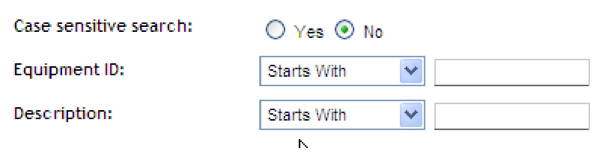
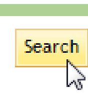
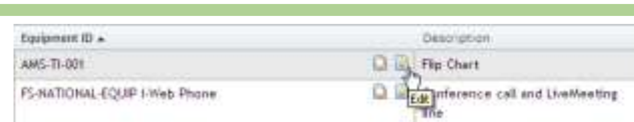
AgLearn defines Equipment as a reusable physical resource needed for the delivery of training (e.g., overhead projectors, television monitors, VCR players, etc.). Subtasks pertaining to Managing Equipment are accessible from the Equipment menu. User-specific subtasks include the following: View, Add, Edit, Copy, and Delete an Equipment Record.

A Day-in-the-Life Scenario
Equipment Records at your facility need to be updated. You need to:
Add a new VCR
Delete an Overhead Projector
Indicate that the 25-inch Video Monitor is unavailable due to maintenance

Notes

View an Equipment Record

Complete definitions of terms are included in the glossary.

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Equipment**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** tab, locate the desired equipment.	
7.	Click the corresponding **View** link to view more information.	

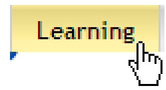
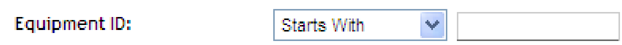
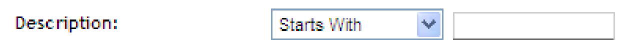
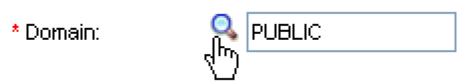
Inform students that they can also view scheduled offerings for the equipment from the **Offerings** tab on this screen.

Notes

Complete definitions of terms are included in the glossary.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

Add a New Equipment Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Equipment**.	
4.	Select the **Add New** link.	
5.	Enter the **Equipment ID**.	
6.	Enter an equipment description in the **Description** field.	
7.	Click the **Domain** Search icon to search for and enter a domain.	
8.	Enter a serial number in the **Serial Number** field.	
9.	Click the **Equipment Type** Selection icon to search for and enter an equipment type.	
10.	Click the **Equipment Status** Selection icon to search for and enter an equipment status.	
11.	Click the **Assigned Location** Selection icon to search for and enter an assigned location.	
12.	Click the **Facility** Selection icon to search for and enter a facility.	

Notes

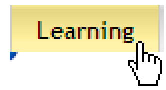
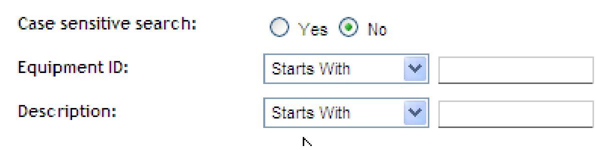
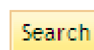
Inform students they can use this field to enter free-form comments.

Add a New Equipment Record

Step	Activity	View
13.	Enter a contact name in the **Contact** field.	
14.	If applicable, enter comments in the **Comments** field.	
15.	Click **Add**. **Caution**: A Validation Error message will appear if all required fields are not complete.	

Note: For additional information about managing equipment, see **Managing a Facility Record**, **Managing a Location Record**, **Managing Scheduled Offerings**, and **Managing Segments**.

Edit an Equipment Record

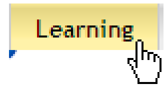
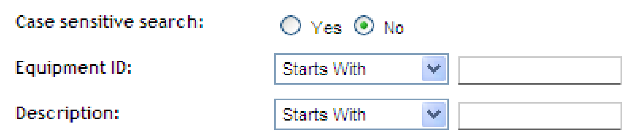
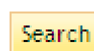
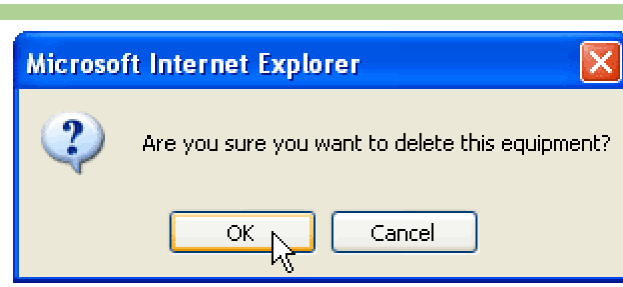
Notes	Step	Activity	View
Complete definitions of terms are included in the glossary.	1.	Select the **Learning** menu.	
	2.	Select **Resources** from the left menu.	
	3.	Select **Equipment**.	
	4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	5.	Click **Search**.	
	6.	On the **Results** screen, locate the desired equipment.	
	7.	Click the corresponding **Edit** icon to edit equipment information.	
Inform students to make all necessary changes using the tabs available. However, caution them to click **Apply Changes** before selecting a different tab. Otherwise they will lose all their changes and modifications.	8.	Make the appropriate changes and click **Apply Changes**. **Caution**: Do not select a different tab prior to clicking **Apply Changes** or else all changes and modifications will be lost.	
	9.	Click the **Offerings** tab to view the Scheduled Offerings for the equipment.	

Note: For additional information about editing equipment associated with a Scheduled Offering, see **Managing Scheduled Offerings** and **Managing Segments**.

Notes

Complete definitions of terms are included in the glossary.

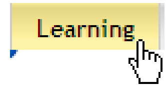
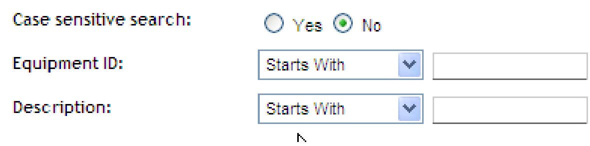
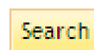
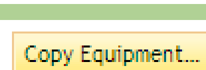
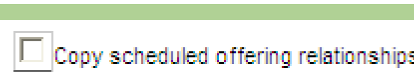
Delete an Equipment Record

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Select the Learning menu.</td><td>
</td></tr>
<tr><td>2.</td><td>Select Resources from the left menu.</td><td>
</td></tr>
<tr><td>3.</td><td>Select Equipment.</td><td>
</td></tr>
<tr><td>4.</td><td>On the > Search screen, enter the appropriate search criteria.
Note: See Managing Data Entry and Searches for more detailed information on searching.</td><td>
</td></tr>
<tr><td>5.</td><td>Click Search.</td><td>
</td></tr>
<tr><td>6.</td><td>On the Results tab, locate the desired equipment.</td><td>
</td></tr>
<tr><td>7.</td><td>Click the corresponding Edit icon.</td><td>
</td></tr>
<tr><td>8.</td><td>Click Delete.</td><td>
</td></tr>
<tr><td>9.</td><td>Click OK in the Confirmation box.
Caution: Be certain that the equipment selected should be deleted. If unsure, click Cancel.</td><td>
</td></tr>
</table>

Notes

Complete definitions of terms are included in the glossary.

Copy an Equipment Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Equipment**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** screen, locate the desired equipment.	
7.	Select the corresponding **Edit** icon.	
8.	Click **Copy Equipment…**.	
9.	Enter the new **Equipment ID**.	
10.	If applicable, select the **Copy scheduled offering relationships** check box.	
11.	Click **Copy**.	

Managing a Location Record

After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

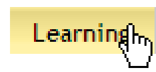
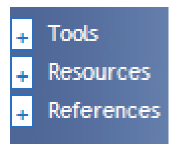
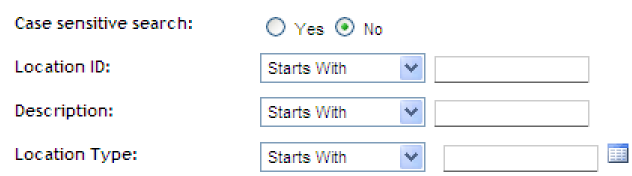
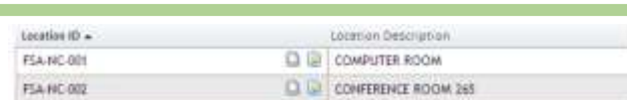
A location is a specific place within a facility where an offering (or a segment within an offering) is delivered. Locations can be anything from classrooms and simulators to barns and fields. Subtasks pertaining to **Managing Locations** are accessible from the **Locations** menu. User-specific subtasks include the following: **View**, **Add**, **Edit**, **Copy**, and **Delete a Location Record**.

A Day-in-the-Life Scenario
Two small classrooms at your facility have recently been renovated to create one large conference room that can hold up to 50 people.

Notes

View a Location Record

Complete definitions of terms are included in the glossary.

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Click **Locations**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry** and **Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** tab, find the desired location.	
7.	Click the corresponding **View** icon to view more information.	

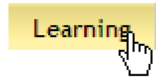
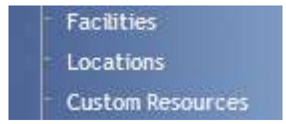
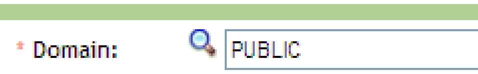
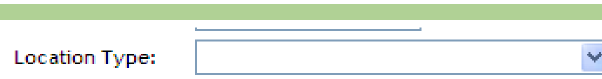
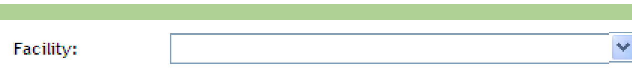
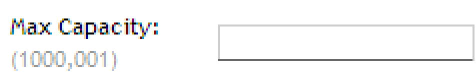
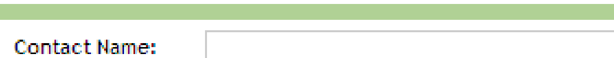
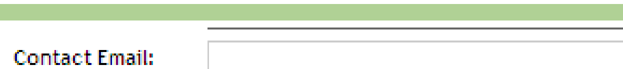
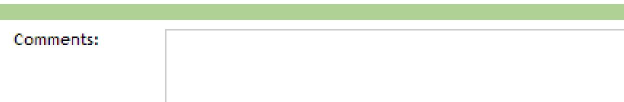
Notes

Scheduling an Activity for a location resource, reserves the resource even if the activity is not training related.

Complete definitions of terms are included in the glossary.

The contact name should be the name of the person responsible for this location. It may be the same name as the facility,

Add a New Location Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Locations**.	
4.	Select the **Add New** link.	
5.	Enter the **Location ID**. **Note**: Check with your agency lead for the naming standard.	
6.	Enter a location description in the **Description** field.	
7.	Click the **Domain** Selection icon to search for and enter a domain.	
8.	Select the **Location Type** from the drop-down list.	
9.	Select the **Facility** from the drop-down list.	
10.	Enter the maximum capacity for registration in the **Max Capacity** field.	
11.	Enter a contact name in the **Contact Name** field.	
12.	Enter the contact's e-mail address in the **Contact Email** field.	
13.	Enter comments as appropriate.	

Notes

An association between facility and location can be made using the **Add from List** link in the **Add Facility** section. An association can also be made in the location record.

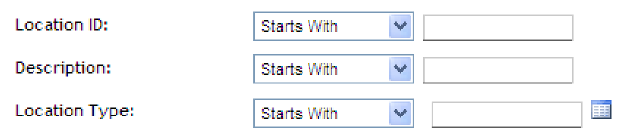
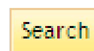
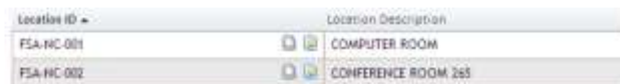
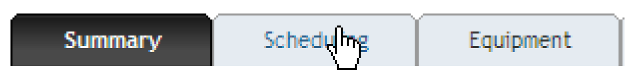
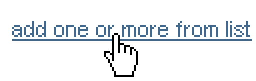
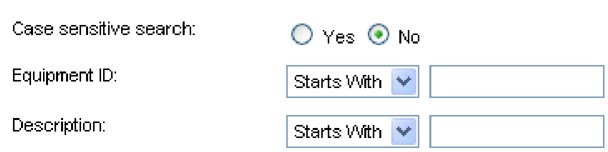
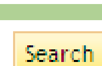
Add a New Location Record

Step	Activity	View
14.	Click **Add**. **Caution**: A **Validation Error** message will appear if all required fields are not complete.	

Notes

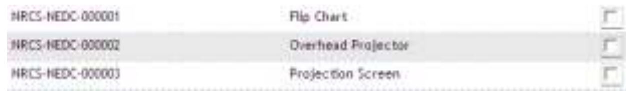
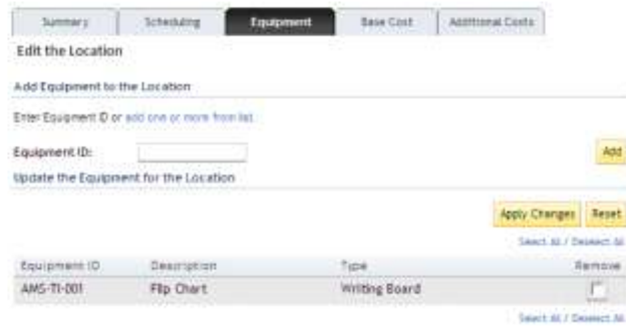
Complete definitions of terms are included in the glossary.

Edit a Location Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Click **Locations**.	
4.	On the **> Search** screen, enter the appropriate search criteria.	
5.	Click **Search**.	
6.	On the **Results** screen, find the desired location.	
7.	Click the corresponding **Edit** icon to edit location information.	
8.	Make the appropriate changes and click **Apply Changes**.	
9.	Click the **Scheduling** tab to view the list of Scheduled Offerings for a location.	
10.	Click **Equipment** tab.	
11.	Select the **Add one or more from list** link to add equipment to the location.	
12.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
13.	Click **Search**.	

Notes

Edit a Location Record

Step	Activity	View
14.	On the **Results** tab, find the equipment and select the corresponding **Add** check box.	
15.	Click **Add**.	
16.	On the **Equipment** tab, make any additional equipment changes. **Note**: Click the **Remove** check box to remove assigned equipment or click the **Select All** link to select and remove all equipment.	
17.	Click **Apply Changes**.	

Notes

Complete definitions of terms are included in the glossary.

Copy a Location Record

Step	Activity	View
1.	Select the **Learning** menu.	Learning
2.	Select **Resources** from the left menu.	Tools Resources References
3.	Select **Locations**.	Facilities Locations Custom Resources
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	Case sensitive search: Yes No Location ID: Starts With Description: Starts With Location Type: Starts With
5.	Click **Search**.	Search
6.	On the **Results** screen, locate the desired location.	Location ID / Location Description FSA-NC-001 COMPUTER ROOM FSA-NC-002 CONFERENCE ROOM 265
7.	Select the corresponding **Edit** icon.	Location ID FSA-NC-001 FSA-NC-002
8.	Click **Copy Location**.	Copy Location...
9.	Enter the new location ID of the newly copied record in the **New Location ID** field.	New Location ID:
10.	Select the check boxes of the location record elements to be copied.	Move fixed equipment from old location to new. Change scheduled offering segments where old location is scheduled to new location.
11.	Click **Copy**.	Copy

Notes

Complete definitions of terms are included in the glossary.

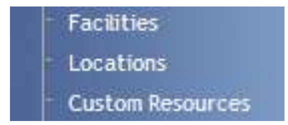
Delete a Location Record

Step | **Activity** | **View**

1. Select the **Learning** menu.

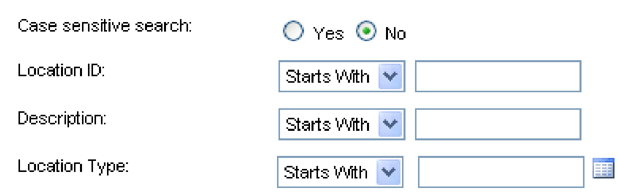
2. Select **Resources** from the left menu.

3. Click **Locations**.

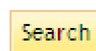


4. On the **> Search** screen, enter the appropriate search criteria.

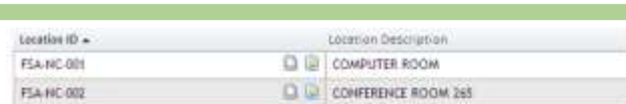
Note: See **Managing Data Entry and Searches** for more detailed information on searching.



5. Click **Search**.

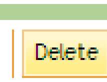


6. On the **Results** tab, find the desired location.



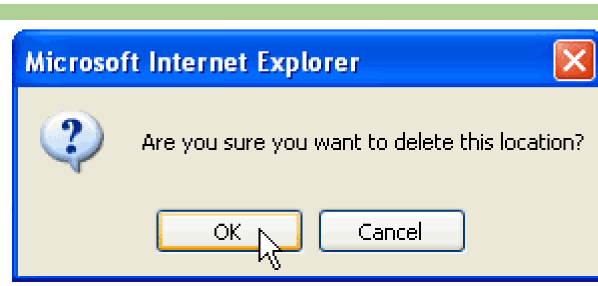
7. Select the corresponding **Edit** icon.

8. Click **Delete**.



9. Click **OK** in the **Confirmation** box.

Caution: Be certain that the location selected should be deleted. If unsure, click **Cancel**.



Managing a Facility Record

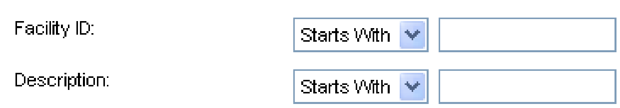
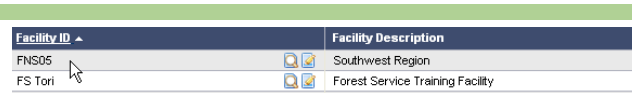
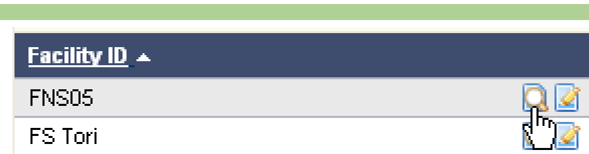
A facility can be a building (Whitten) or a complex (BARC); its purpose is to provide a logical grouping of “locations” where training takes place. (Locations were discussed above.) Subtasks pertaining to **Managing Facilities** are accessible from the **Resources** menu. Facility-specific subtasks include the following: **View**, **Add**, **Edit**, **Copy**, and **Delete a Facility Record**.

A Day-in-the-Life Scenario

A new training facility has recently become available for use by your agency. The facility is located approximately 2 blocks from the South Building, and includes six classrooms. Although no equipment is currently located in the new classrooms, you have been authorized to transfer a portion of the equipment that is assigned to your current facility.

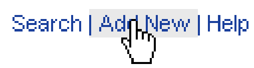
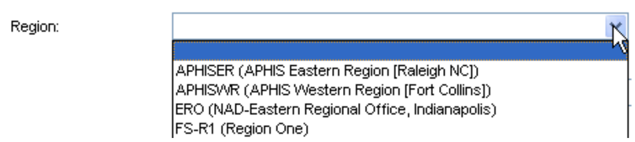
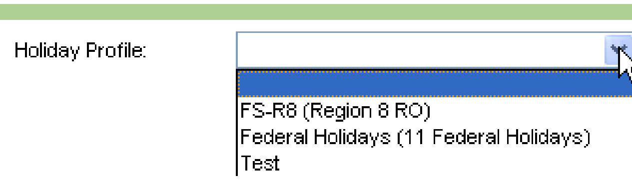
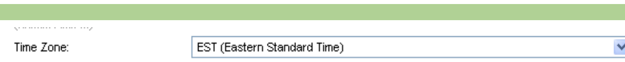
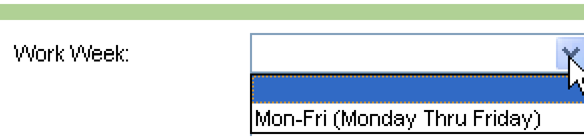
Notes

View a Facility Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Facilities**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** screen, locate the desired facility.	
7.	Select the corresponding **View** icon to view more information.	

Notes

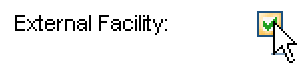
Add a New Facility Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Facilities**.	
4.	Select the **Add New** link.	
5.	Enter the **Facility ID**.	
6.	Enter a facility description in the **Description** field. **Tip**: Enter an easily recognizable name for the facility in the **Description** field.	
7.	Click the **Domain** Search icon to search for and enter a domain.	
8.	Click the **Region** Selection icon to search for and enter a region.	
9.	Click the **Holiday Profile** Selection icon to search for and enter a holiday profile.	
10.	Click the **Time Zone** Selection icon to search for and enter a time zone.	
11.	Click the **Work Week** Selection icon to search for and enter a work week profile.	

Notes

Add a New Facility Record

12. If applicable, select the **External Facility** check box.



13. If applicable, enter comments in the **Comments** field.

Once a new record is submitted, the **Search Results > Edit Summary** screen appears. From this screen, students can add contacts, locations, equipment, and materials to a facility.

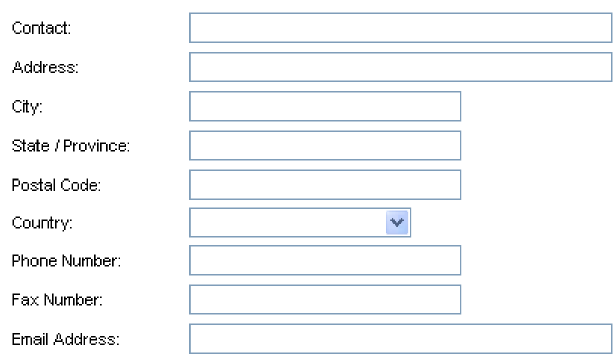
14. Click **Add**.

Caution: A **Validation Error** message will appear if all required fields are not complete.

Remind students that it is important to enter POC information for a facility.

15. Click the **Contact** tab.

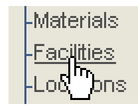
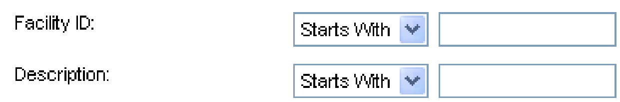
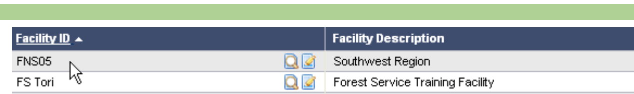
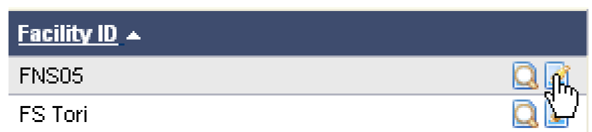
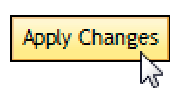
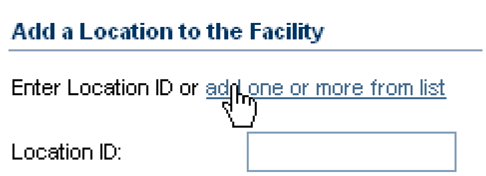
16. Enter information about the facility's contact person in the appropriate fields.



17. Select **Apply Changes**.

Note: See **Edit a Facility Record** to view information on adding locations, equipment, and materials to a facility.

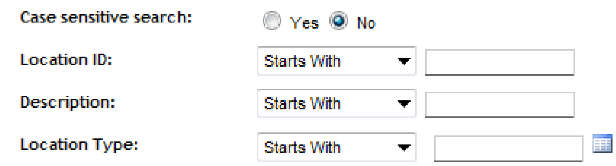
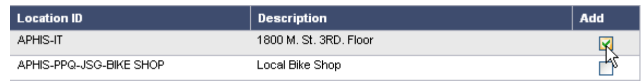
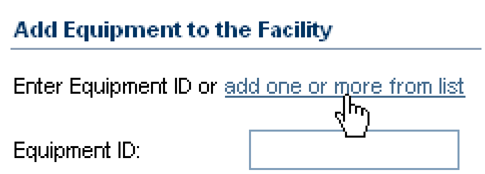
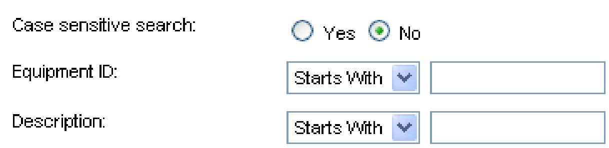
Edit a Facility Record

Notes	Step	Activity	View
Complete definitions of terms are included in the glossary.	1.	Select the **Learning** menu.	
	2.	Select **Resources** from the left menu.	
	3.	Select **Facilities**.	
	4.	On the **> Search** screen, enter the appropriate search criteria.	
	5.	Click **Search**.	
	6.	On the **Results** screen, locate the desired facility.	
	7.	Select the corresponding **Edit** icon to edit facility information.	
Make all necessary changes using the tabs available. However, click **Apply Changes** before selecting a different tab or you will lose all changes and modifications.	8.	Make the appropriate changes and click **Apply Changes**. **Caution**: Do not select a different tab prior to clicking **Apply Changes** or all changes and modifications will be lost.	
	9.	Click the **Contact** tab.	
	10.	Make the appropriate changes and click **Apply Changes**.	
	11.	Click the **Locations** tab.	
If the Location ID is known, you can enter it directly and click **Add**.	12.	Select the **Add one or more from list** link to add a new location to the facility.	

Notes

If the Equipment ID is known, students can enter it directly and click **Add**. (It is an extra step to select it from the list, but possibly easier, since the Equipment ID may be difficult to memorize.) Inform students that Equipment IDs are auto-generated.

Edit a Facility Record

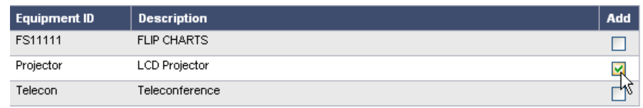
Step	Activity	View
13.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
14.	Click **Search**.	
15.	Find the location and select the corresponding **Add** check box.	
16.	Click **Add** to return to the **Edit Locations** screen. **Note**: Once added, the location will appear in the **Update the Locations for the Facility** section. **Tip**: Click the corresponding **Remove** check box to remove a location from the facility.	
17.	Click the **Equipment** tab.	
18.	Select the **Add one or more from list** link to add equipment to a facility.	
19.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
20.	Click **Search**.	

Notes

Edit a Facility Record

Step **Activity** **View**

21. Find the equipment and select the corresponding **Add** check box.



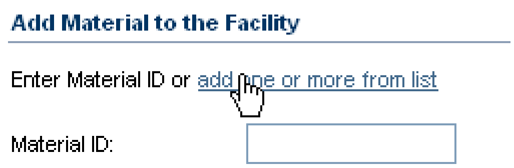
22. Click **Add** to return to the **Edit Equipment** screen.

Note: Once added, the equipment will appear in the **Update the Equipment for the Facility** section.

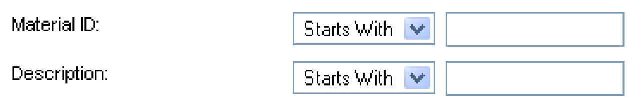
Inform students that materials refer to consumable supply items that are used during learning, such as pens, handouts, giveaways, etc.

23. Click the **Materials** tab.

24. Select the **Add one or more from list** link to add materials to a facility.

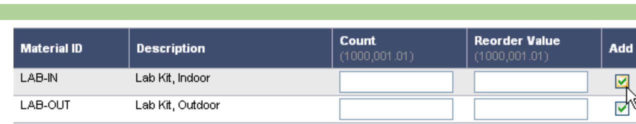


25. On the **> Search** screen, enter the appropriate search criteria.

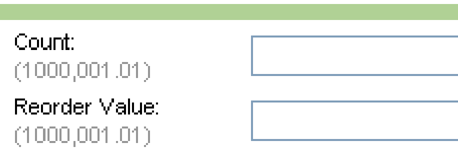


26. Click **Search**.

27. Find the material and select the corresponding **Add** check box.



28. Enter appropriate information in **Count** and **Reorder Value** fields .



Once added, the material will appear in the **Update the Materials for the Facility** section.

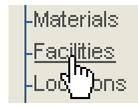
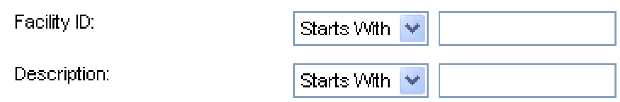
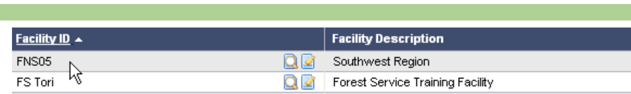
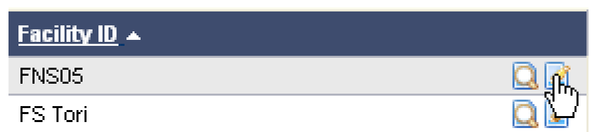
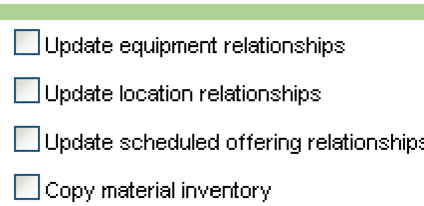
29. Click **Add** to return to the **Edit Facility** screen.

Tip: Click the corresponding **Remove** check box to remove material from the facility.

Notes

Complete definitions of terms are included in the glossary.

Copy a Facility Record

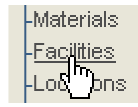
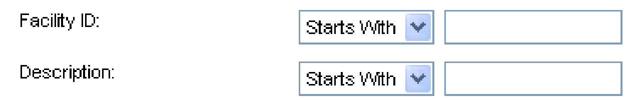
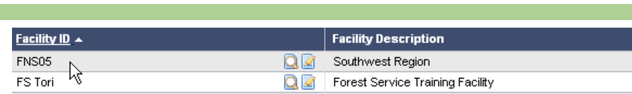
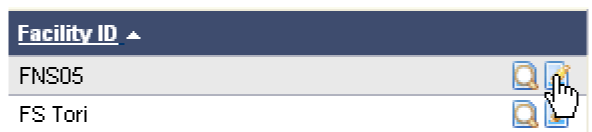
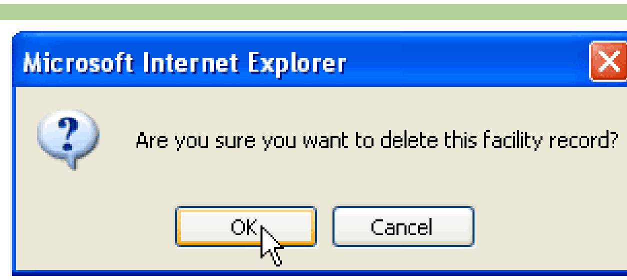
Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Facilities**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** screen, locate the desired facility.	
7.	Select the corresponding **Edit** icon.	
8.	Click **Copy Facility…**.	
9.	Enter the facility ID of the newly copied record in the **New Facility ID** field.	
10.	Select the check boxes of the facility record elements you want to copy.	
11.	Click **Copy**.	

Inform students that they can copy equipment, location, and scheduled offering relationships as well as material inventories.

Notes

Complete definitions of terms are included in the glossary.

Delete a Facility Record

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Resources** from the left menu.	
3.	Select **Facilities**.	
4.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
5.	Click **Search**.	
6.	On the **Results** screen, locate the desired facility.	
7.	Select the corresponding **Edit** icon.	
8.	Click **Delete**.	
9.	Click **OK** in the Confirmation box. **Caution**: Be certain that the facility record selected should be deleted. If unsure, click **Cancel**.	

Managing Training Approval Processes

AgLearn has the ability to manage multiple multi-level training approval processes. The creation of additional approval mechanisms and roles will be handled at a higher level; agency administrators will assign Users to approval roles and associate specific Approval Processes with Items and Scheduled offerings.

An approval process may have as many as six steps, though six-step approvals will be rare. A User's two immediate supervisors are automatically set up in the system to fill two default approval roles; many Items may only require a supervisor approval.

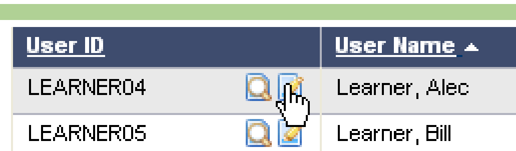
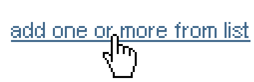
For more complicated processes, seven other roles have been created. This grants each agency the flexibility to use the processes best suited to their needs, and appropriate for each Item. Approval Roles such as Budget, Training Coordinator, and Training Officer can be mapped to specific individuals if those titles exist in your agency. More generic roles (Approver 1, Approver 2, Reviewer, and Final Approver) have been created for processes that need more flexibility in the selection of personnel to fill each role.

A Day-in-the-Life Scenario

It has been decided that Users should get their supervisor and Budget Officer to approve a specific Item before registration is permitted. You must assign a User to the role of Budget Officer and modify the Item record to reflect this new policy.

Notes

Assign an Approval Role to a User

Step	Activity	View
1.	Select the **User Management** menu.	
2.	**Search** for the User for whom you wish to add or change an Approval Role.	
3.	Locate the User on the **Results** screen.	
4.	Click the corresponding **Edit** icon.	
5.	Click the **Approval Role** tab.	
6.	Click **Add one or more from list**.	
7.	Click **Search** to look for the role to be added.	

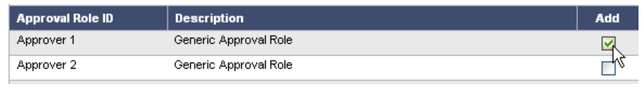
Remind students to tab between the name fields

Notes

Assign an Approval Role to a User

Step | **Activity** | **View**

8. Click the checkbox in the **Add** column on the proper line.



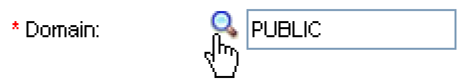
9. Click **Add**.

The new Role won't be added to the database until this step is done.

10. Click the link for **Control Domain**.

11. Click **Add one or more from list**.

12. Click the **Search** icon to find the domain to be added.

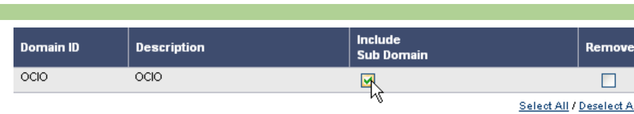


13. Click the checkbox in the **Add** column on the proper line.

Note: You must click both boxes on the line if you want all sub-domains to be included.

14. Click **Add**.

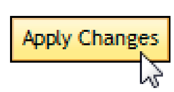
15. Check the boxes to verify if the role is being granted to just that Domain, or to all sub-Domains under it.



16. Click **Submit**.

17. Click **Return to Approval Role**.

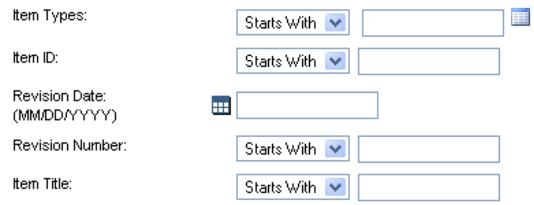
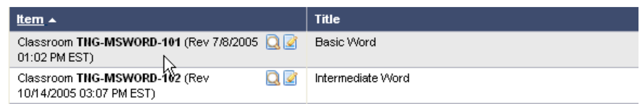
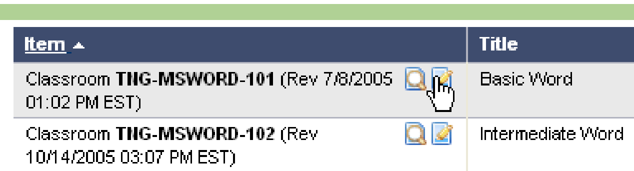
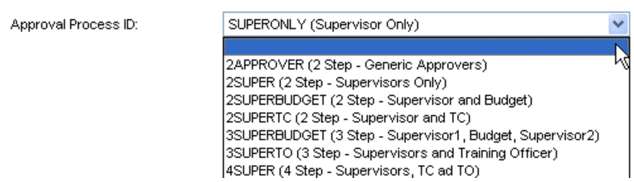
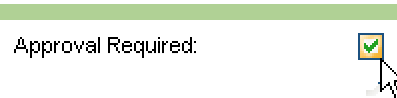
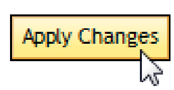
18. Click **Apply Changes**.



Notes

See Managing Data Entry and Searches for more detailed information on searching.

Add a Training Approval Process to an Existing Item

Step	Activity	View
1.	Select the **Learning** Menu.	
2.	On the **> Search** screen, enter the appropriate search criteria.	
3.	Click **Search**.	
4.	On the **Results** screen, locate the desired Item. **Tip**: Use **Ctrl+F** to quickly find an Item on the screen.	
5.	Select the corresponding **Edit** icon to view the Item's Summary tab information.	
6.	Pull down **Approval Process ID** menu to select an Approval Process ID.	
7.	Select the **Approval Required** check box.	
8.	Click **Apply Changes**.	

Managing Communities

AgLearn enables you to conduct asynchronous, threaded discussions through online communities. Each Community contains one or more topics; the individual topics are composed of multiple messages. Users are then free to read or post messages at their convenience.

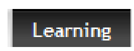
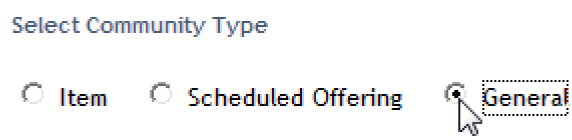
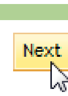
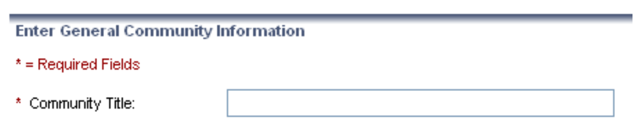
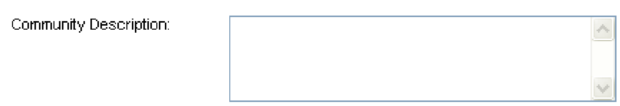
Communities in AgLearn are created by administrators and managed by moderators. The administrator functions, including assigning a moderator to the community, are performed from AgLearn Administration. The moderator - who is a User - performs his or her community functions through the User Interface.

A Day-in-the-Life Scenario

A General Community is to be created for AgLearn administrators to exchange ideas. Moderators must be assigned to manage this community.

Notes

Create a General Community

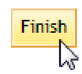
Notes	Step	Activity	View
	1.	Select the **Learning** menu.	
	2.	Select **Communities**.	
	3.	Click **Add New**.	
Remind students to tab between the name fields	**4.**	Select the Community Type: **General**.	
	5.	Click **Next**.	
	6.	Enter a **Community Title**. **Note**: This is a required field.	
	7.	Enter a **Community Description**.	
Note: The default is PUBLIC. Change this unless you want any administrator to be able to make changes.	**8.**	Enter the **Domain** from which the Community will be managed.	

Notes

Note: Locking the Community prevents new additions or replies. It does not delete the Community, nor does it prevent existing posts from being read.

Note: Subscribing to a Community allows easy access when logged in as a User without having to search for it.

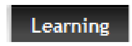
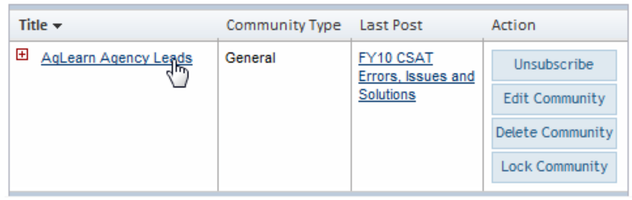
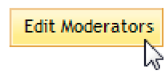
Create a General Community

Step	Activity	View
9.	To lock the community, check the **Lock Community** checkbox.	
10.	To subscribe to the newly created community, click the Subscribe checkbox.	
11.	Click Finish. **Note**: Click **Back** if you wish to change the type of Community being created.	

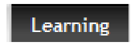
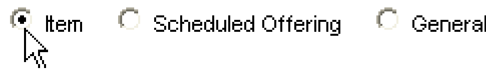
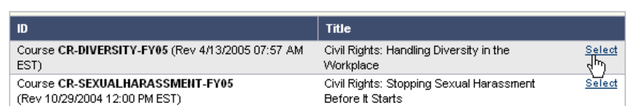
Notes

Remind students to tab between the name fields

Designate Moderators for a Community

Step	Activity	View
1.	Select the **Learning** menu.	
2.	Select **Communities**.	
3.	Click the **Title** of the community to which you want to add a Moderator.	
4.	Click the **Edit Moderators** button.	
5.	Click the **Users** link to select one or more Users from a list. **Note**: You may enter the User's ID directly into the **User ID** box if you know it.	
6.	Enter any **Comments**.	
7.	Click **Add**.	

Add a Community to an Existing Item

Notes	Step	Activity	View
	1.	Select the **Learning** menu.	
	2.	Select **Communities**.	
	3.	Click **Add New**.	
	4.	Select the Community Type: **Item**.	
	5.	Click **Next**.	
	6.	Click the **Search** icon to search for an Item.	
	7.	Enter **Search** parameters for the Item.	
	8.	Click **Search**.	
Note: The Item Type, Item ID, and Item Title fields will be automatically populated.	9.	Click the Item's corresponding **Select** link to add the community.	
Locking prevents additions or replies	10.	To lock the community, check the **Lock Community** checkbox.	
Subscribing allows easy access when logged in as a User.	11.	To subscribe to the newly created community, click the **Subscribe** checkbox.	
	12.	Click **Finish**.	

Note: Communities may be added to an existing Scheduled Offering. The process is essentially the same as above; substitute "**Scheduled Offering**" for "**Item**" in the instructions, and be prepared for screen that will look slightly different. It is a good idea to have the ID number of the Scheduled Offering handy before starting the process.

Glossary

A

Accomplishment: Part of the performance module, Accomplishments are achievements that are not directly related to the User's employment or job satisfaction.

Account Code: The unique code used to track the charge-back information of a transaction.

Active: An active record is available to be updated, fully functional, and will appear on reports. To change the status of an Item or to view, edit, and report on an inactive record, the system administrator must grant the AgLearn Administrator a security privilege to do so.

Active Locale: Locale is the term used to describe a specific language with a given cultural, geographical, and political region (i.e., a local market). Think of an active locale as a specific language with related information such as numbers, date, and time currency for a specific local market.

Activity: A Learning Event associated with an initiative. Activities are automatically assigned to goals when Users align their goals with an initiative. Users can also assign their own activities to goals. When an activity is assigned to a goal, Users can request a schedule of the related learning, or add the learning event to their To-Do Lists.

Admin User ID: A system ID that appears when AgLearn takes any automatic action, such as moving a User from the Waitlist to Enrolled status when someone withdraws from a Scheduled Offering, or when a training request is denied because the necessary approvals have not been granted before the start date of the learning event.

AICC: Airline Industry CBT Committee. A standard for online courseware that guarantees interchangeability and data exchange capability between online learning development packages and players.

Align an Initiative: To an initiative at the subordinate level in support of initiatives posted at a higher level. See also *Adopt an Initiative.*

Assessed Level: The mastery level earned by the selected User for the associated competency.

Assessment: The assessment/rating of a User's demonstrated Competencies, based on a previously established rating scale. Users can assess themselves or their peers through Assessment Surveys. Administrators can record assessments using the Competency Assessment Recorder. Completed Assessments are displayed in the User's Assessment History.

Assessment Date: The date on which an assessment is completed in AgLearn.

Assessment Process: The procedure by which individual User(s) are assessed on one or more competencies.

Assessment Rating: The relationship between a User's assessed mastery of a competency and the mastery rating expected of the competency.

Assessment Survey: A collection of competencies and rating criteria used to assess one or more Users.

Assignment Profile: Used to automatically assign Curricula, Catalogs, and Competency Profiles based on multiple User attributes, including (but not limited to) Domain ID, Country, Job Position, Job Location, Organization, Employment Type, or State. Users whose attributes match those of the Assignment Profile are automatically assigned the appropriate Curricula, Catalog, or Competency Profile.

Assignment Type: Categories used to help to prioritize a User's learning needs by distinguishing between need-to-have and nice-to-have Items. Typical examples of assignment types in AgLearn are Optional, Recommended, Required, and Legislatively Mandated. Default Assignment Types can be assigned at the Item level, but may be edited to suit the situation of each subsequent assignment.

Associated Costs: Any cost of conducting a segment of a Scheduled Offering that is not otherwise defined. Examples might include food, clean-up, or travel; and any cost of instructors, material, equipment, or location, in addition to those already defined in AgLearn.

Attainment Level: An informal indication of how well a User is progressing toward assigned goals. There are three qualitative statuses for the selected initiative: On Target, Behind Plan, and Ahead of Plan.

Auto Fill Registration Flag: When enabled, moves the next waitlisted User into an enrolled status when a previously enrolled User withdraws from an offering.

Automatic Processes Module (APM): Processes pre-configured to run periodically without human intervention. APMs typically perform housekeeping and notification tasks at scheduled intervals.

B

Background Jobs: Jobs (such as large-scale assignments or reports) that would be too time/processor-intensive to run during normal working hours, and are configured to run during a specific off-hours time period. The number of records defined in the selected job MUST exceed the predefined threshold (Maximum Record Count for Online Operation) set for running background jobs.

Basis Date (curriculum): The basis date defines the beginning point of a curriculum's associated time-periods. The time-periods themselves are built using either the initial assignment information, or the retraining assignment information. Once complete, the Item is not due again until the end of the next designated period. This allows assigned learning that is due once a quarter, or once a year, to be completed at any time during the quarter or year.

Blended Item: A Learning Item type with elements of both Instructor-Led and Online Learning Items.

C

Cancellation Policy: A set of rules used to calculate what the User is charged when withdrawing from a Scheduled Offering.

Cascading Initiatives: Initiatives created in a parent organizational unit that are then made effective in subordinate units. There are ways to push initiatives to subordinate organizations: Forcing requires the sub-organizations to adopt the initiative as is; Require Alignment means the sub-organizations must align one or more of their initiatives to the parent initiative; Make Available gives the sub-organizations the option to align one or more of their initiatives to the parent initiative.

Catalog: A collection of Items, Curricula and Scheduled Offerings made accessible to Users via Assignment Profiles. Users can only view training that is included in catalogs made visible to them. Items and Scheduled Offerings can be part of more than one catalog.

Chargeback: A financial transaction that occurs internally, between organizations, with one being debited for costs accrued and the other being credited for the price of services delivered. The transaction is systemic only; no invoices or checks actually change hands.

Chargeback Adjustment: A wizard used to reconcile chargeback transactions after closing a Scheduled Offering, debiting the related cost centers, and crediting profit centers of the selected Scheduled Offering. Note: A Scheduled Offering cannot be closed with an open segment.

Circular supervisor relationship: A circular relationship exists when a User is designated as his own supervisor, no matter how many levels removed. AgLearn will not permit such an arrangement and will return a Validation Error to reject any change that would create such a circumstance.

Class: An entity in AgLearn that associates a group of Users with a set of Scheduled Offerings, used to help administrators keep the Users together through a series of Scheduled Offerings. Roughly analogous to school classes, such as freshman class, sophomore class, etc.

Classification: There are four Item classifications: Instructor-Led, Online, Blended, and Other (for physical goods).

Coach: A coach is a User who may view, update, or add comments to a User's Individual Development Plan (IDP), designated by the User or supervisor. The coach has no role in the approval process of the IDP.

Company: The company by whom an Instructor is employed. This is a non-referenced text entry field associated with an Instructor record.

Competency: Competencies are measurable capabilities that are required or recommended for effective performance. Assigning a competency to an Item indicates the User will be considered to have reached the indicated proficiency level upon successful completion of the Item. *See also: Competency Type.*

Competency Assessment: The assessment/rating of a User's demonstrated Competency, based on a rating scale. Users can record assessments for themselves or their peers using the Assessment Recorder, or an Assessment Survey may be used. Administrators can record assessments using the Competency Assessment Recorder. Completed Assessments are displayed in the User's Assessment History.

Competency Assessment Level: Rating given to a User that indicates his or her command of a specific competency. The rating scale is established in the Competency Assessment subsection of the Application Admin section (System Admin area).

Competency Category: A text label (e.g., Teamwork) used to group similar competencies when displayed in a view, assessment survey, or report.

Competency Profile: A grouping of competencies that can be associated with a job position or a function to help manage the skill sets required of Users with similar responsibilities. Competency Profiles can include minimum required mastery levels as aids to identifying gaps in a User's training.

Competency Type: There are four types of competencies: Skill - Physical or mental activities that support the performance of job-related activities. Knowledge - Facts and information needed to comprehend, recognize, and/or recall terms, rules, concepts, and symbols related to the performance of job-related activities. Ability - Capacity to meet physical and/or psychomotor requirements for job-related activities (usually an innate physical attribute). Attitude - Behavior required to perform job-related activities. *See also, Competency.*

Completed Work: A detailed listing of a User’s recorded Learning Events.

Completion Status: Indicates the current status of an Item (or Scheduled Offering), relative to a User. The completion status appears with each Item in Completed Work (if complete) or the To-Do List (if incomplete).

Contact Hours: The actual number of hours of instruction received during a Scheduled Offering. For example, an Item that begins at 8 AM and ends at 5 PM is nine hours in duration, but may only count as eight contact hours due to a one-hour lunch break. The delineation between contact hours and total hours allows accurate recording of actual training time compared to the total hours of resource usage.

Content Object: A database record indicating content that can be launched by Users, such as Web-based training, online documents, and executable files.

Content Package: A Content Package is any grouping of Content Objects, Exam Objects, and/or Objectives. Content Objects may belong to more than one Content Package.

Content Player: Any software application used by a workstation to open and/or play an online Content Object.

Copy Daily Segments: Duplicates an entire day full of segments within a Scheduled Offering, including all related data. The duplicate segments can then be edited to suit schedule needs.

Cost Center: The account code being debited in a financial transaction. If multiple cost centers are debited in a single transaction, the total percentage distribution MUST equal 100.

Cost Formula: The mathematical expression used by the AgLearn to calculate the cost of a selected event or transaction.

Cost Name: User-defined name for a cost with associated formula. The formula can be numeric, and/or another cost name with any combination of the following valid mathematical operators. Cost names are used in association with both Items and Scheduled Offerings. An example of a Cost Name: FOOD, with the Formula: Drinks+Lunch+Dinner.

CPE: Credit for Professional Education. Assigned by professional organizations as a way of tracking the volume and currency of specific, profession-related training.

Credit Hours: A method of tracking the successful completion of Items by weighting the relative value of each Item. Any number of credit hours can be associated with each Learning Item, to be awarded upon completion of the Item.

Critical Needs: Learning needs that have expired, are overdue, or will expire within the curriculum expiration notification threshold set by the system administrator.

Currency Pattern: Indicates the default format for currencies used in the selected Active Locale.

Curricula Requirement: A rule used to determine completion of a curriculum, such as “any three Items from a pool of five”, or “9 credit hours from a pool of four Items”.

Curriculum: A grouping of Items and/or sub-curricula that facilitates the assignment of related Items to a User. Curricula are also convenient for the assignment and tracking of mandatory retraining intervals.

Custom Report: A report created to return data on USDA-specific events not readily available in the standard reports that ship with AgLearn. Examples are Bulk Reports, and Incompletion Reports.

Custom Resource: A resource used in a Scheduled Offering that is not an instructor, material, equipment, or location.

D

Days Remaining: Number of days remaining before an Item on a User's To-Do List will be overdue.

Decimal Pattern: Indicates the default format of integers and specified decimal places in the selected active locale.

Delivery Method: The instructional method used to deliver learning. Examples might include Instructor-Led Training, Computer-Based Training, On-the-Job Training, and Self-Study. Delivery methods should be designed with reporting and information tracking needs in mind.

Delivery Offset Days: The number of days prior to the scheduled delivery date of the selected Item.

Direct Link: A link, created by an administrator in AgLearn, that guides the recipient directly to a specific page in AgLearn. Direct Links can be inserted into either e-mails or notifications.

Document: Any media (book, videotape, procedure, manual, audiotape, regulation, etc.) for which a record has been created in AgLearn. Documents may be associated with Items, curricula, tasks, or may stand alone.

Document Type: A category used to differentiate among training documents. Examples may include Vendor Manual, Regulation, Corporate Policy, Job Aid, etc. Reporting and information tracking needs should be kept in mind when creating document types.

Domain: An administrative unit in AgLearn, derived from USDA Organization Codes. AgLearn's domain structure is roughly equivalent to USDA's hierarchy. Domains determine which administrators can create and edit the objects contained within them. See also *Domain Restrictions.*

Domain Restriction: Defines the domains in which an administrator has authority. Domain restrictions may be assigned at the entity, function, and workflow levels for any role. See *Workflow*.

Domain Type: Used to determine which types of records may be assigned to a domain. For example, if a domain includes the Organization domain type then organization records can be assigned that domain. The domain types are: Users, Items, Curricula, Competencies, Competency Profiles, Scheduled Offerings, Facilities, Locations, Equipment, Instructors, Tasks, Documents, and Organizations.

Dynamic Survey: A survey used to assess a User's assigned competencies and job positions.

E

E-Signature Meaning Code: Used by Administrators to provide reasons and meaning for changing data that require electronic signatures. The Meaning Code enhances compliance with FDA 21 CFR Part 11 requirements ensuring the authenticity, integrity, and confidentiality of electronic records.

Effective Date: The date when a new or revised Item will be in effect for the calculation of Item completion statuses and curriculum statuses. By default, new Items have the current date as the effective date. Be aware that accepting the current date will make any curricula containing the Item incomplete, as Users will not have had time to complete the new or revised Item.

Employee Status: Indicates the User's employment status (e.g., full-time, part time, temporary, seasonal, etc.).

Employee Type: Used to designate whether a User is a contractor, consultant, partner, etc.

Equipment: Reusable resources used in the delivery of Scheduled Offerings. Examples include overhead projectors, television monitors, and VCR players.

Equipment Status: The current status of a given piece of equipment, as defined in AgLearn, such as Operational, On Loan, Inoperative, Undergoing Maintenance, etc. Depending on the definition of an equipment status, equipment may not be available for scheduling.

Equipment Type: Categories by which different types of equipment may be grouped, such as Overhead Projector, VHS VCR, Video Monitor, etc.

Exam/Survey Object: A database record containing all details of an online examination or survey, including questions and objectives, percentage grade required for passing, electronic proctoring requirements, messages displayed to Users before and after the exam, the exam's launch method, information about usage, and other software behaviors.

External Event: A Learning Event for which there is no corresponding AgLearn Item. An example might include a college course, or a one-time seminar.

External Exam: Any exam created with a tool other than Plateau Question Editor.

External Reports: Reports generated using third party tools, then run in AgLearn.

F

Facility: A grouping of training locations. Facilities may be buildings, plants, branch locations, or any other logical way to group locations. The locations within a facility can share the facility's work week profile, holiday profile, equipment inventory (for equipment assigned to a specific facility, but not to a specific location within the facility), and material inventory.

Field Chooser: Describes the ability to add or remove columns in Search Results tables.

Force Incomplete: When checked for a curriculum, this check box requires AgLearn to calculate whether the status should be Complete or Incomplete based on the User's latest attempt at completing the Item. If the User's latest attempt is incomplete, the system will calculate the expiration and required dates based on the date/time of the last unsuccessful attempt, whether or not the initial retraining period has expired.

Free-floating competency: A competency assigned to a User independent of any competency profiles or job position.

Free-floating Item: An Item assigned to a User, independent of any curriculum.

G

Gap: The difference between a required level and the User's current level for a specific competency that is included in the User's competency profile. A negative gap indicates a learning need (e.g., the required mastery level is 4 and the User is assessed at a level of 3; the gap is -1 and a learning need exists).

Goal: A grouping of objectives in a development plan. A goal represents a high-level development milestone toward which a User may strive. Goals need not be realistically attainable (e.g., to become the perfect basketball player). A goal is supported by one or more objectives, each of which should be related to achieving the goal.

Grade: A value to indicate a User's examination score for a specific learning event. Grades may be numeric or ratings-based.

Group Instance: A collection of existing Scheduled Offerings. Group instances can be used as search criteria to help keep groups of Users together by enrolling them in the same Scheduled Offerings as a unit. For example, an Item has training sessions occurring simultaneously for the same Item. Each session has 2 Scheduled Offerings, but one session is in California and one is in New York. By adding a Group Instance for each location, Users cannot be inadvertently enrolled in one Scheduled Offering in New York, and another in California.

Grouping: A mechanism by which administrators can define how report output is displayed. For example, a User Item Completion Report may display By User, with each completed Item appearing under headings of User names; or By Item, with User names displayed under headings for each Item. Many standard reports grant the option to start each group on a new page.

H

Holiday: Calendar dates defined in AgLearn when training should not be scheduled at a learning facility. When you schedule an offering, AgLearn will not allow you to schedule the offering at a facility on a date that has been defined as a holiday, unless you override the default. When you schedule an offering lasting two or more days, AgLearn will skip over any holidays unless you override the default.

I

Individual Development Plan (IDP): A collection of goals, objectives, and activities for a specific User. An IDP is a defined career and professional development plan, generally developed collaboratively between a User and his/her Supervisor. It reflects the current and future development needs for the User (employee), including both the employee's current position as well as desired future positions. It may include personal and professional goals. An approved IDP is related to the User's To-Do List, but is broader, as it may include non-learning related activities as well.

Individual Development Plan (IDP) Template: A collection of IDP sections that may be established unique to each agency.

Initial Period: The number of days between the assignment of a learning requirement and its required completion. Each Item can have a default initial period that may be overridden on assignment.

Initiative: Allows executives and managers to define the goals for the Department or their respective agencies as a way of providing employees with guidance in the creation of Individual Development Plans.

Initiative Alignment: Describes the relationship of goals among different levels in the same agency hierarchy. For example, how the goals for APHIS-VS relate to the goals for all of APHIS.

Instructor: A human resource, defined in AgLearn, that is used to deliver learning.

Integer Pattern: Describes the default format of whole integers in an active locale.

Internationalization (I18N): The process of developing and implementing the application so it is easily adaptable to a specific local language or set of standards.

Inventory Type: All inventory tracked in AgLearn is defined as either a Material or an Item (distinct from Learning Item, as described below).

Item: Also referred to as Learning Item. An assignable unit of learning for which completion can be tracked and recorded. Items can be Web-based, Instructor-Led, blended, written materials, videos, etc.

Item Pool: A selected group of Items that make up a curriculum requirement.

Item Source: Typically identifies an Item's origin, such as developer or author, agency of ownership, etc.

Item Type: Logical groupings of learning activities useful to differentiate among potentially similar Items. Typical Item types include course, class, certification, OJT, interview, etc. Types should be defined with reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization.

Iteration (online exam): An attempt by a User to complete an exam. For exams and surveys created in the Exam Definitions section, iterations can be limited to one by specifying, on the Summary tab, that the maximum number of allowable attempts for the exam is one. Instructor or administrator intervention can be made necessary before subsequent iterations by setting the Lock exam flags.

J

Job Location: The physical location where a User works.

Job Position: A definition or title of the employment position held by a User.

L

L10N (Localization): The process of adapting the application to a particular language (within a specific geographic and political region), and desired local standards like date, time, currency, etc. AgLearn is an internationalized application, developed so that localization is relatively easy to achieve.

Label: The displayed value that describes a specific entry on the interface of the application.

Label Links: A link adjacent to a data entry field that names the field and acts as a tool to find the relevant data. Clicking a label button opens a page through which the administrator may search for allowable values.

Launch Method: Specify the file path (location) for online content and command line parameters (as needed) that are used when a User launches the Content Object. There are five different launch methods: Content Player, Document Type, AICC, Browser, and SCORM.

Learning Event: A User's completion, or attempted completion, of a Learning Item. For example, when attendance or participation in a Learning Item is recorded, a corresponding Learning Event is added to the User's Completed Work. Learning Events can be either internal (based on an AgLearn Item) or external.

Learning History: (See Completed Work)

Learning Needs: Learning Items assigned to a User's To-Do List.

Learning Plan: (See To-Do List)

Locale: The amalgamation of a specific language's unique syntax and patterns for numbers, date, and time specifications, and standards for labels as well. See also *Active Locale*.

Localization (L10N): The process of adapting the application to a particular language (within a specific geographic and political region), and desired local standards like date, time, currency, etc. AgLearn is an internationalized application, developed so localization is relatively easy to achieve.

Location: A specific place within a facility where a Scheduled Offering or Segment is delivered. Locations could be classrooms, simulators, or conference rooms. See also *Location Types*.

Location Type: A logical grouping of locations. Typical examples might include Classroom, In- Plant Location, Simulator, or Auditorium. Location type data is used by AgLearn to provide a list of suitable locations when creating a Scheduled Offering. By default, AgLearn displays only locations of the type(s) indicated as suitable, but the default can be overridden, if necessary.

M

Master Inventory: A list of all Items and Scheduled Offerings available in your system. Catalogs are populated from the Master Inventory.

Materials: Supplies that are used up during learning, such as pens, handouts, giveaways, etc. Commonly known as consumables.

Maximum Assessment Rating: This field contains the maximum rating to use for competency assessments.

Maximum Registration: This indicates the maximum capacity for a Scheduled Offering.

Minimum Registration: The minimum number of enrollments required for a specific Scheduled Offering to occur. This field is strictly informational and will not impact the Scheduled Offering.

N

Next Action Date: See *Required Date*.

Nominator: The person authorized to propose rater(s) to assess a User.

Notification Database Tag: A variable used in the notification templates and syntaxes, replaced at run time by context-based data.

Notification Syntax: The notification tag definition used to perform looping. See also *Notification Database Tag.*

Notification Template: A pre-parsed message format that includes database tags to be populated at run time within a defined context. The templates may have multiple syntaxes.

Numeric Grading: Allows the creation of multiple score ranges, associating each range with a completion status. Users are assigned a completion status corresponding with their score for the Item in question. See also, *Ratings-based Grading.*

O

Objective Grade Value: The percentage of correct answers required for a User to have mastered (or passed) an Objective.

Objectives: A statement that specifies the skills acquired by the successful completion of the learning session. Effective objectives describe what Users must accomplish, focus their attention on critical components, guide trainers in the development of instructional materials, and specify the knowledge and skills on which the Users are to be evaluated.

Offering: See *Scheduled Offering.*

Offset: The time between the end of one segment and the beginning of the next for the same Scheduled Offering. For example, if a one-hour lunch break is to be inserted between the morning and afternoon segments of an offering, an offset of one hour can be indicated. AgLearn will automatically calculate the appropriate start and end time, leaving the one-hour gap for lunch.

Online Item: Any Item that is available for Users via the Internet.

Online Settings: The parameters and settings for the delivery of online content.

Organization: Any virtual entity to which a User belongs, created solely for AgLearn administrative purposes. An Organization need not have any relationship to any actual USDA entity. The Organization entity can be used to reserve Slots, make purchases, grant User permission to use Account Codes, and control User access to Catalogs.

Organizational Group: A grouping of organizations.

P

Pattern: A format that describes the manner in which dates, time, and numbers are displayed throughout the application.

Pattern Type: The categories into which Patterns are grouped. The four Pattern Types in AgLearn are Integer, Decimal, Currency, and Percentage. See also *Pattern.*

Peer: In evaluations, a User or external person other than the User being evaluated, that User's supervisor, or one of that User's subordinates.

Pending List: A virtual listing of all Users with approvals currently pending.

Percentage Pattern: Used to indicate the default format of percentages in the selected active locale. See also *Pattern*.

Performance Review: Used to appraise, measure, and report on an individual employee's performance during a specified time period, such as a calendar or fiscal year.

Performance Review Process: The definition of how and when performance reviews are created and scheduled for employees.

Performance Review Template: The definition of the format and steps involved in a performance review, and the options available to the individuals involved.

Pool of Items: A defined group of Learning Items from which a User must select in order to satisfy a requirement.

Post-work materials: Consumables that must be sent to students and/or instructors after the completion of a Scheduled Offering. Examples might include surveys, follow-up reading material, etc.

Pre-work materials: Consumables that must be sent to Users and/or instructors in advance of a Scheduled Offering. Examples might include prerequisite reading material, pre-class assessment, etc.

Prerequisites: Items that must be completed before the current Item can be attempted.

Pricing Rule: The ID, description, and discount rate (percentage) for pricing Items in the Master Inventory and catalogs.

Proctor: An instructor who has been designated as an online examination monitor. Proctors are assigned proctor codes that enable them to unlock User machines in the event of certain events or conditions, such as a failing grade on an exam.

Profit Center: Refers to the entity/account that is being credited in a commercial transaction.

Published Price: The price published for a selected Item.

Q

Question: A single page that appears in an exam or survey, giving Users an opportunity to demonstrate their ability to distinguish the correct answer from among a choice of possible answers.

R

Rater: A User, supervisor, subordinate, or peer tasked with evaluating a User in AgLearn.

Rater Approver: The person designated to approve the proposed rater(s) for a User.

Rating Criteria: Text descriptions for each rating label in a rating scale.

Rating Label: Text labels that describe the meaning of each integer value of a particular rating scale.

Rating Scale: A range of continuous integer values (1..n). Multiple rating scales can be defined, each with different values for “n”. A rating scale can be associated with more than one competency.

Ratings-based Grading: Allows multiple values to be used for grading, each of which may be associated with a completion status. Completion statuses may then be assigned based on where the User’s examination score falls in a range. See also, *Numeric Grading.*

Region: An entity that describes the location of assets and Users. Regions do not need to be geographically based. If a facility is assigned to a region, the locations, equipment, and materials associated with the facility are also placed in that region.

Register: To place a User's name on the planned list of participants in a specific course offering.

Registration: To place a User's name on the planned list of participants in a specific Scheduled Offering.

Registration Status: The status of a User's registration. Types include: Enrolled, Waitlist, Pending, and Cancelled.

Report: Data generated in HTM, CSV, XML, or PDF from a specific query.

Request: A notification generated by a User to inform AgLearn of the User’s need or desire for specific training. A request does not place a User in active registration or on the Waitlist for any specific instance. AgLearn may automatically create Requests when an Item is canceled or when a Scheduled Offering is delivered with Users still on the Waitlist who could not be accommodated.

Required Date: The date by which an Item or a selected curriculum MUST be completed.

Requirement: An entity that allows Users to exercise flexibility when determining which training to complete to receive credit for a curriculum, essentially creating “electives”. Examples of Requirements would be “any three Items from a pool of five” or “twelve credit hours from a pool of six Items”. Requirements may be combined with mandatory Items and sub-curricula in the same curriculum. See also *Requirement Type.*

Requirement Type: A means of categorizing Requirements. There are three Requirement Types: Number of Hours of a Specific Credit Type, Number of Hours of a Specified Hour Type from a Pool of Items, and Number of Items from a Pool of Items. See also *Requirement*.

Requirements-based Curriculum: A curriculum for which the completion status is determined by Requirements, instead of a listing of mandatory Items. See also *Requirements.*

Resource: Assets needed to execute a Scheduled Offering, such as instructors, locations, equipment, etc.

Retraining Interval: The number of units of time that may pass between the time a User completes an Item in a Curriculum and when the Item must be completed again. This applies only to Items that require recurring training. If a retraining interval has been passed without completion, the Curriculum will become incomplete.

Retraining Period: Refers to the number of units of time between the last time a User completed an Item and when he or she must complete it again.

Review Flag: A system-generated flag automatically created when a document is revised. The flag indicates that an Item or curriculum related to the document has not been checked for any potential conflicts between the current information and information that may have been added, deleted, or changed by the revision.

Revision Date: The date of an Item’s most recent revision. A new Item’s Revision Date will be the date of origination.

Role: A combination of one or more workflows assigned to an administrator. See also *Workflows*.

Rule: Comprised of a Delivery Offset (Days) with a corresponding reimbursement price adjustment for the selected Item or material.

Rule-Level Retraining Period: Provides a mechanism to specify a retraining period separate from the Item retraining period. Selecting a rule-level retraining period overrides the Item level retraining periods for all Items associated with the selected requirement.

Rule Template: Provides “out-of-the-box” rule templates that may be used to quickly build curriculum requirements. The templates contain all the entities needed to create a valid requirement.

S

Schedule Block: Used to describe offerings that are not Item-based, do not appear in Catalogs, and do not have User events recorded against them. Schedule Blocks are often used to make Users and resources unavailable on the learning calendar, such as when equipment is undergoing maintenance, or a User is out of the office for an extended period of time, etc.

Scheduled Offering: An Item or learning event with a scheduled date and time.

SCORM: Sharable Content Object Reference Model (SCORM). Defines a Web-based Learning Content Aggregation Model and Run-Time Environment for learning objects. The SCORM is a collection of specifications adapted from multiple sources to provide a comprehensive suite of e-Learning capabilities that enable interoperability, accessibility, and reusability of Web-based learning content.

Search Page Selector Icon: A control that opens a search page where you can select an element from the database. The element you select will fill in the corresponding field to the right of the icon.

Security Profile: Pre-defined sets of security permissions (e.g., View, Create, Modify, etc.), called security functions, assigned to each AgLearn Administrator. Security profiles and domain privileges work together to define an administrator’s permissions in the system.

Segment: Unit of division of an Item offering, based on duration, that facilitates variable resource scheduling. For example, a 40-hour course can be divided into five 8-hour segments, scheduled one segment per day for five days; divided into ten 4-hour segments, scheduled two segments per day for five days; into four 10-hour segments, scheduled one per day for four days, etc.

Sequence Number: Indicates the order in which the User is expected to complete the Items in the curriculum. Sequence Numbers do not apply to online Items.

Shopping Account ID: A unique ID created for individual Users and organizations to track their commercial transactions.

Site: A server site for the system. Sites have different URLs and allow different User populations to use the system.

SKU: Stock Keeping Unit (SKU). An inventory mapping mechanism used in catalogs.

Slot: A space reserved for a specified Organization in a Scheduled Offering. Slots are considered to be filled seats, even though the name of the User filling the seat may not yet be known.

Sorting: In a Report, allows for output to be displayed in various formats, allowing the administrator to choose which display best suits the needs of the specific report.

Subject Area: Categories for Items and competencies used to facilitate User searches for Items in the Catalog. Subject Areas group Items and Curricula with similar topics and/or interest groups.

Subject Area Pools: In rule-based curricula, provides the ability for a User to specify a select group of Items in a specific subject area that are associated with a curriculum requirement.

Subordinate: All Users who have the target User as a supervisor (either immediate or indirect– e.g., supervisor of supervisor).

Substitute: An Item that is credited as a similar Item in AgLearn. For example, if a Curriculum requires the completion of an Instructor-Led Basic Word Item, the Web-based version may be designated as a Substitute, allowing a User to pass the Web-based version and receive credit for the Instructor-Led Item.

Succession Planning: Used by supervisors to evaluate an employee’s competencies against the competencies of a job position’s incumbent, and to assign Items to help the employee achieve mastery of the competencies. It can also be used to evaluate a group of employees to determine which employee is most qualified to replace an incumbent.

Supervisor: A User designated to oversee another User’s learning. A supervisor has the ability to log in to AgLearn Learning on behalf of their subordinates, view subordinates’ learning information, and assign learning to them. If granted permission by the system administrator, supervisors can also record learning events for their subordinates.

System Reports: Standard reports that come with AgLearn.

T

Target: Indicates whether the student or instructor should receive the material.

Task: A task is a discrete unit of work with a definite beginning and end, which can be performed in a relatively short period of time, and which results in a finished product, a completed service, or a change in the work environment.

To-Do List: A list of Items a User must complete, with target completion dates for each.

Total Hours: The number of hours of training contained in a Scheduled Offering, including non-instructional time. For example, an Item that meets from 8am to 5pm may have eight hours spent in training (contact hours), but nine total hours, indicating the number of hours the resources are in use; the extra hour takes into account the lunch hour.

Training Administrator: The User who creates assessment surveys and initiates the assessment processes.

U

User: Any person for whom a record has been created in the Users section of the User Management area, including employees, contractors, and others for whom you wish to keep learning records and to register for courses.

User Hours: The length of a Scheduled Offering (the sum of the segment durations).

V

V-Calendar: A file that can be sent as an e-mail attachment to automatically enter appointment information on the recipient's calendar. The recipient must use a VCalendar-compliant calendar program such as Microsoft Outlook, Netscape Calendar, or others.

vCalendar: The vCalendar specification defines a format for exchanging scheduling information in AgLearn. The vCalendar holds information about events that are normally used by group schedulers.

VLS: A file that can be sent to a person as an e-mail attachment that can automatically enter appointment information on the recipient's calendar. The recipient must use a VCalendar-compliant calendar program such as Microsoft Outlook, Netscape Calendar, or others.

W

Waitlist: A list of Users trying to register for a Scheduled Offering that has already reached a maximum capacity.

Work weeks: The days of the week during which training may be scheduled at a facility.

Workflow: A combination of a function applied to an entity. An example of a workflow is "View Users" (i.e., the function "VIEW" and the entity "USERS". A domain restriction is applied to each workflow to restrict access to certain data). See *Domain Restriction*.