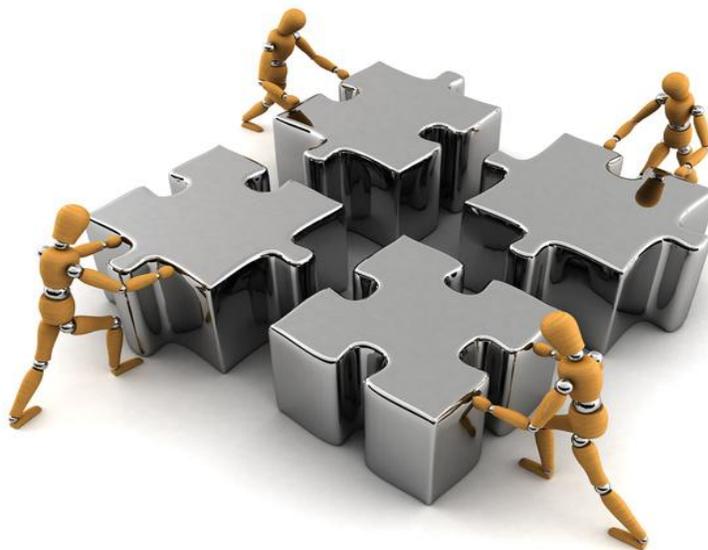


USDA/ARS

AGLEARN TRAINING FOR TRAINING DESIGNEES

Putting the Pieces Together



October 2012



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The Administration Environment

The Administration environment of AgLearn provides administrators with the ability to track the range of information needed to manage USDA learning programs effectively. This manual provides an overview of the Administration environment, and job aids for referencing day-to-day Administrator duties. To log in as an Administrator, go to <http://www.aglearn.usda.gov> and follow these steps to login as an Administrator to AgLearn:

1. Click **Login**
2. Click **Continue** to accept the security admonition.
3. Enter your e-Authentication credentials.

aglearn+
adding to your knowledge

508 Accessibility | About AgLearn | Help | Contact Us

"The many courses I have taken in AgLearn have been interesting and have helped me to do a better job as a USDA/FSIS employee. There are so many different kinds of courses in AgLearn, everyone can find something of Interest!"

---Carolyn Ash, USDA Employee

FIND A NEW COURSE TODAY

Login >

Need an Account?
Sign Up Now.

Welcome to AgLearn!
Add to your knowledge with new and exciting courses built for you.

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's
- Performance
- Learning
- Commerce
- System Admin
- References
- Reports

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. This manual will focus on three menu display options: User Management, Learning and Reports.

Welcome Walker, Lyndell A | [Check System](#) | [Sign](#)

Home Admin

Home Users Performance Learning Content Commerce System Admin References Reports

Search: [Go](#)

Welcome

Welcome to AgLearn Administration
 New to AgLearn Administration? We have provided a brief tutorial to help you learn your way around.
[Watch the Tutorial](#)

Quick Links

- Create Online Course**
 After creating an Item (course) and User, you can either assign the course [User Needs Mgt] or go straight to record completion for the User. The completi...
- Create Instructor-Led Course**
 After creating the User and the Item (course), schedule when the course will be taught (an Offering of the course). Completion can be marked based on ...
- Add Item**
 Create any assignable unit of training. These can be either an online learning, instructor-led, a blended version of both, or an ad hoc learning exercise.
- Add Scheduled Offering**
 A Scheduled Offering is an Instructor led course. It allows for registration by users. Additionally, resources can be specified for its execution such as the ...
- Record Learning - Multiple**
 Store the completion of a course or any other learning related item, including scheduled offerings
- User Needs Mgmt**
 Assign or remove assignments for groups of Users. Assignments can include Curriculum, Courses, and Competencies.

Administrator Home Page (Continued)

The screenshot shows the AgLearn Administrator Home Page. At the top, there is a navigation bar with tabs for Home, My Employees, Organization, and Admin (highlighted as the 'Admin Tab'). A 'User Tabs' callout points to the top navigation area. A 'Collapse/Expand' callout points to a small arrow icon on the right. Below the navigation bar is a 'Button Bar' with icons for Home, Users, Performance, Learning, Content, Commerce, and System Admin. A search bar is located below the button bar, with a 'Search Bar' callout. The main content area features a welcome message: 'Welcome to Kathy and Dana's Training Environment. New to AgLearn Administration? We have provided a brief tutorial to help you learn your way around. Watch the Tutorial'. A 'Bookmarks Guide Me' callout points to a play button icon. A 'Quick Links' callout points to a section titled 'Quick Links' which contains several action items: 'Create Online Course', 'Create Instructor-Led Course', 'Create AgLearn Exam', 'Add Item', 'Add Catalog', 'Add Scheduled Offering', 'Record Learning - Multiple', and 'User Needs Mgmt'. A 'Layout Help' callout points to a help icon in the top right corner.

- **User & Admin Tab:** One Interface with Multiple Tabs
- **Button Bar:** Options displayed based on your assigned role(s)
- **Collapse/Expand:** Allows more space to work with the related information. When you expand the related information, the system expands that content into the summary and actions areas so that you can view and work with more of the content.
- **Search Bar:** The new Search Bar allows for Global keyword search of data and users across the AgLearn Database & also to locate and run quick commands.
- **Bookmarks & Recent:** Bookmarks provide quick access to records you use most frequently. Recent provide quick access to records that were accessed or modified most recently.
- **Guide Me:** Guide Me provides less experienced administrators with a guided process for completing multi-step actions.
- **Layout & Help:** Change layout of Welcome screen to horizontal or vertical views. Help system covers all possible actions in AgLearn.
- **Quick Links:** Allows quick access to common functions

Menu Tab Descriptions

The table below lists the nine “links” or menu options with their corresponding descriptions, available to the AgLearn Administrator.

Menu Option	Example	Description
Home	 Home	The Home link contains the Welcome Page and Quick Links, which has links to the most commonly performed tasks for administrators and a link to the Plateau Help System.
Users	 Users	The Users link provides access to those system functions used to manage general User information, User competency assessments and User learning events.
Performance	 Performance	The Performance link allows the administrator to manage competencies, performance evaluations and succession planning.
Learning	 Learning	The Learning link provides access to those system functions used to create, manage, and schedule learning events. You can create scheduled offerings, objectives, curricula, exams and survey objects.
Content	 Content	The Content link provides access to those system functions used to manage online content, such as content objects (courseware), surveys, questions and exam objects.
Commerce	 Commerce	The Commerce link provides sets of functions and tools that allow administrators to track resource costs for the delivery of training and the tuition (pricing) charged for a user to attend or launch a training event.
System Admin	 System Admin	The System Admin link provides access to those system functions used to manage AgLearn application variables and settings, security and data domain privileges.
References	 References	The References link manages the referenced fields that you can use throughout SuccessFactors Administration such as Calendars & Time, Geography, Learning and Performance.
Reports	 Reports	The Reports link provides access to those system functions used to generate any available AgLearn Reports.

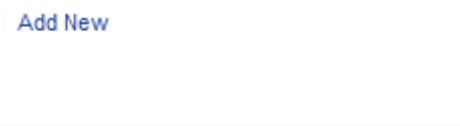
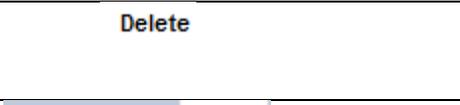
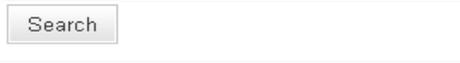
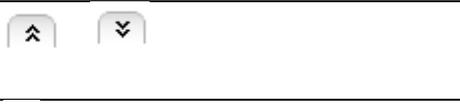
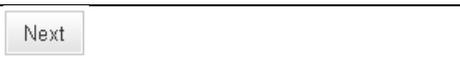
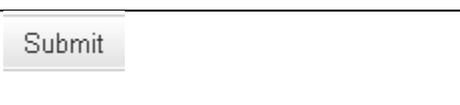
Menu Options

This table below lists the seven menu options, with their corresponding sub-menu options available to the AgLearn Administrator

Users	Performance	Learning	Content	Commerce	System Admin	Reports
Users	Competencies	Items	Questions	Master Inventory	+Application Admin	User Management
Job Codes	Competency Profiles	Scheduled Offerings	Exam Objects		+Security	Performance
Job Families	Skill Search	Classes	Objectives		+Custom Columns	Learning
Positions		Group Instances	Documents		+Tools	Content
Organizations		Catalogs	+Tools		Background Jobs	System Admin
Regions		Curricula				Miscellaneous
+Tools		Requirements				
		Surveys				
		Communities				
		Instructors				
		Task				
		+Tools				

Universal Controls

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

Menu Option	Example	Description
Home & Admin tabs		The Home & Admin tabs allow the administrator to switch back and forth between user and administrator interface.
Related Bar		This area of the record shows the additional tabs for the selected record.
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.
Add		The Add button creates a new record corresponding to the selected submenu option (e.g., if Learning/Items is selected, clicking the Add New button provides the opportunity to create a new Item record.
Delete		The Delete button appears in the Action bar 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		The Records per Page field indicates the number of records to be shown on each page.
Search		The Search button performs a search based on the criteria selected on the Search screen.
Expand/Collapse		Click the Expand button when you need more space to work with the related information. The Collapse button restores back to the original space.
Filter		The Filter icon opens a separate window to define search parameters.
More		The More link displays more tabs associated with the record.
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		The Next button displays the next screen in a sequence when using one of the Assistants.
Previous		The Previous button displays the previous screen in a sequence when using one of the Assistants.
Submit		The Submit button submits the information entered on previous screens and completes the process when using an Assistant.
Help		The Help button, which is located in the upper right hand corner of the Content frame, displays in a new window the help screens relevant to the corresponding sub-menu option
Sign Out		The Sign Out button, which is located in the upper right hand corner of the Top Menu frame, ends the current AgLearn session.
Check System		The Check System link checks if the software versions on the computer system are compatible with the AgLearn interface

The User Management Menu

The **User Management menu** allows you to search for users in the system. Once a user is located, the user's ID can be used to record learning, schedule training, remove items from a users learning plan, and create an SF-182, to name a few. The User Management menu also allows you to utilize tools such as the learning event recorder, learning event editor, and the user needs management tool. Some of these tools are discussed in this training lesson.

Home Users Performance Learning Content Commerce System Admin

Search:

Users Search | Search |

Job Codes
Organizations
Organization Groups
Tools

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

Case sensitive search: Yes No

User ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Role ID: Starts With

User Status: Active Not Active Both

Email Address: Starts With

Domains: Starts With

Items Needs: Exact **Type:**
ID:

Employee Types: Starts With

Supervisors: Starts With

Organizational Unit: Starts With

Employee Number: Starts With

Home Users Performance Learning Content Commerce System Admin

Search:

Users
Job Codes
Organizations
Organization Groups
Tools

Record Learning - Financial | Help |

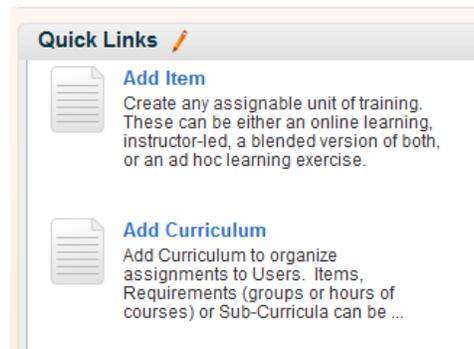
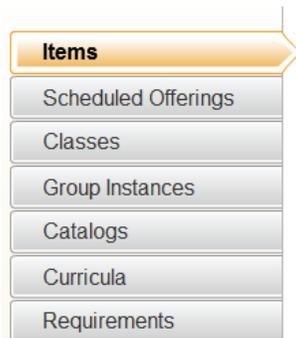
> Step 1

Step 1: Select Event Type

Item External Event Scheduled Offering

Record Learning - Financial
Record Learning - Multiple
Learning Event Editor
Merge Users
Send Notifications
Supervisor Assistant
User Needs Mgmt

The Learning Menu



The Learning menu and Quick Links are where items and curricula are created. An item is a learning activity that can be tracked by AgLearn. An example of an item is the course: Ethics training: What can be accepted from a vendor?

Items may be instructor-led, web-based, and an external training

A curriculum is a group of items combined into one unit that may, or may not, have a specified sequence for completion.

An example of curricula is: Ethics Training

- What can be accepted from a vendor
- Is it right to take my customer out to lunch?
- How much of a monetary gift can I receive?

From the Learning menu, AgLearn administrators will learn how to perform the following functions:

- Create a new item
- Edit an existing item
- Delete an item
- Create a Scheduled Offering
- Create curricula

Types of Items in AgLearn

Please select the type of item you would like to add:



Scheduled Only

This item will be scheduled at specific dates and times, with th...



Online Only

This item will have associated online content that can be launched an...



Scheduled and Online

This item will contain both **scheduled** and **online** components.



Other

This item will be neither **scheduled** nor **online**, and actions must be...

- **Scheduled Only** creates an item (for example, a classroom course) that you can schedule at specific dates and times and to which you can assign an instructor.
- **Online Only** creates an item with *only* online content (for example, a web-based tutorial) that users can launch and complete from the user interface.
- **Scheduled and Online** creates a blended item that contains both scheduled segments and online content.
- **Other** create an item that does not contain scheduled segments or online content (for example, reading a book).

Three important decisions must be made before creating a new item.

1. **Properly name the item.** It is imperative for users to adhere to naming standards when creating items in AgLearn. A naming convention ensures that ARS learning activities are identifiable in the AgLearn system. Remember, AgLearn is used by all 26 USDA agencies, which also create and record learning activities for users. Items created by ARS administrators should begin with **ARS-**.

E.g. **ARS-ADODR-01** – Web-based Training ADOs in ARS
ARS-FD-SHEM BSP – Video for Biological Safety Program

Web Based ARS-AgLearn6.4 Admin Training (Rev 1 - 8/24/2012 04:33 PM America/New York)

AgLearn 6.4 Administrator Training

Items that are courses and programs coordinated or sponsored by an ARS staff member and open to REE employees should begin with **REE-**.

E.g. **REE-STAR Web** – Classroom training for REE employees.

Web Based REE-IDP-Training (Rev 1 - 7/22/2011 09:47 AM America/New York)

REE Individual Development Plan Training - IDP

2. **Home domain must be decided.** Choosing a domain for an item restricts administrative access to that item to only those administrators with permissions in that domain, thus limiting who may alter any aspects of the item's record.

All items created by ARS administrators are placed in the **ARS domain**. This includes items created for REE employees.

E.g.

ID	Description	Levels	Top Level Only	Include Sub Domains
<input checked="" type="checkbox"/> ARS	Agricultural Research Service	3	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> ARS-AFM	Administrative & Financial Management	4	<input type="checkbox"/>	<input type="checkbox"/>
ARS-AFM-EXTERNAL	ARS-AFM-EXTERNAL	5	<input type="checkbox"/>	
<input checked="" type="checkbox"/> ARS-BA	ARS: BA 03-10-12	4	<input type="checkbox"/>	<input type="checkbox"/>
ARS-BA-EXTERNAL		5	<input type="checkbox"/>	
ARS-EXTERNAL	Contractors	4	<input type="checkbox"/>	

3. **Place in AgLearn catalog.** Again, AgLearn is shared by all 26 USDA agencies. As with any college or university, the catalog identifies the types of learning made available from that learning institution. The same is true with AgLearn. Each USDA has its own catalog. Therefore, **Items created for ARS employees, should be placed in the ARS catalog. Items made available to REE employees, should be placed in the ARS & REE catalogs.** Finally, Items to be shared by all USDA catalogs, should be placed in the Public catalog.

ARS Catalog	Flag: <input type="text"/>	Unit: <input type="text" value="MMDD/YYYY"/>	<input type="text" value="0.00 US Dollar (U..."/>
	Reason: <input type="text"/>	Expires: <input type="text" value="MMDD/YYYY"/>	

The Reports Menu

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 screenshot displays the 'Reports' menu in AgLearn. On the left, there is a search and filter sidebar. The main area shows a grid of 107 reports, sorted by title. The reports are organized into columns and rows, with each report entry including a title, a brief description, and a category label.

107 Reports		Sort By: Title	
Account Data	User Management	Approval Process Data	System Admin
The Account Data report returns; for each user; account-related information; such as user ID; contact informat... more		The Approval Process Data report describes approval process template as it is constructed in the administratio... more	
Approval Role Coverage By Domain	System Admin	Approval Role Coverage By Organization	System Admin
The Approval Role Coverage report describes the users; or type of users; assigned to an approval role.		The Approval Role Coverage report describes the users; or type of users; assigned to an approval role.	
Approval Role Data	System Admin	Approvals Status	System Admin
The Approval Role Data report describes how an approval role is used in the system; the processes it is assoc... more		The Approvals Status report describes the status of run-time approval processes in a given date range. It retu... more	
Certificate Of Completion Learning Event	User Management	Certificate Of Completion Learning Event (User)	
The Certificate of Completion report prints the certificates of completion for users from the recorded learnin... more		The Certificate of Completion report prints the certificates of completion for users from their learning histo... more	

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, and 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.**

Adding/Removing Search Criteria

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

Step Activity View

Adding/Removing Search Criteria

1. Select the **Users**



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

Add/Remove Criteria

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

And click Select

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

Case sensitive search: Yes No

User ID:

Last Name:

First Name:

Middle Initial:

Role ID:

User Status: Active Not Active Both

Performing a Search

Step Activity View

1. Select **Users**.



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

Users

3. Enter and/or select the basic search criteria as appropriate.
Note: The data fields may be left blank to select from an entire list.

Case sensitive search: Yes No

User ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Role ID: Starts With

User Status: Active Not Active Both

Domains: Starts With

4. Click **Search**.

Search

5. Review search results.

Records per Page 10 Page: 1 2 3 4 5 «Previous Next» (69 total records)

User ID	User Name ▲	Domain ID	Active	Terminated	City	State / Province
AS037278	Smith, Allen D	ARS-BA	Yes		BELTSVILLE	MD
ASZ107289	Smith, Anthony L	ARS-BA	Yes		BELTSVILLE	MD
AS037265	Smith, Antonia L	ARS-MSA	Yes		OXFORD	MS
BS207265	Smith, Barbara J	NASS	Yes		WASHINGTON	DC
BS037265	Smith, Barbara J	ARS-MSA	Yes		NEW ORLEANS	LA
BS207282	Smith, Blair L	NASS-FO-NY	Yes		ALBANY	NY
BSZ247265	Smith, Brenda S	ARS-PWA	Yes		BURNS	OR
BS037278	Smith, Brennan M	ARS-NPA	Yes		MANHATTAN	KS
BSZ377278	Smith, Bryan D	ARS-SAA	Yes		GAINESVILLE	FL
BSZ367278	Smith, Byron D	ARS-MWA	Yes		AMES	IA

Records per Page 10 Page: 1 2 3 4 5 «Previous Next» (69 total records)

6. To view all the records on 1 page, click the drop down arrow in the Records per Page

Records per Page 10 Page: 1 2 3 4 5 «Previous Next» (69 total records)

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

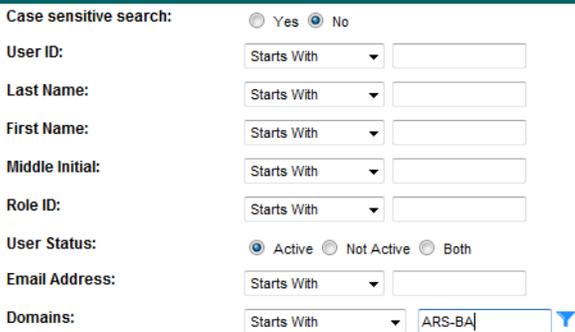
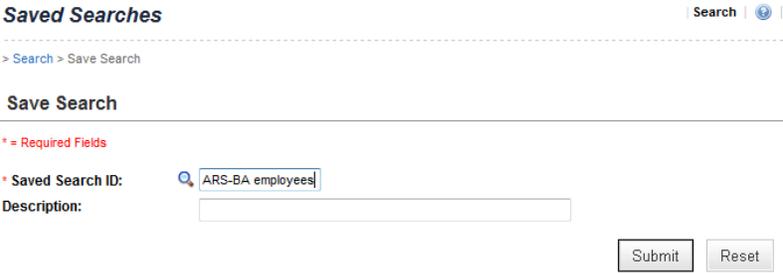
User ID	U	Domain ID	Active	Terminated	City	State / Province	Organization ID	Supervisor	Email Address	Notify
AS037278	5	n D	ARS-BA	Yes	BELTSVILLE	MD	031012	JU037872	smitha@ba.ars.usda.gov	<input type="checkbox"/>
ASZ107289	500	hony	ARS-BA	Yes	BELTSVILLE	MD	031012		anthony.smith@ars.usda.gov	<input type="checkbox"/>
AS037285	L All	Smith, Antonia	ARS-MSA	Yes	OXFORD	MS	036064	RWZ158384	antonia.smith@ars.usda.gov	<input type="checkbox"/>

8. Select the employee User ID to access the record

User ID	User Name ▲
AS037278	Smith, Allen D
ASZ107289	Smith, Anthony L

Saving a Search

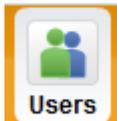
A number of search screens in AgLearn make it easy to find data by applying a search filter. Search can be created by adding or removing search criteria. Most administrators will find a regular set of search criteria to meet their common needs, and will make only occasional changes for special circumstances.

Step	Activity	View
1.	Select the User Management menu.	
2.	Select Users from the left menu	
3.	Enter and/or select the basic search criteria as appropriate. Note: The data fields may be left blank to select from an entire list.	 <p>Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>User ID: Starts With <input type="text"/></p> <p>Last Name: Starts With <input type="text"/></p> <p>First Name: Starts With <input type="text"/></p> <p>Middle Initial: Starts With <input type="text"/></p> <p>Role ID: Starts With <input type="text"/></p> <p>User Status: <input checked="" type="radio"/> Active <input type="radio"/> Not Active <input type="radio"/> Both</p> <p>Email Address: Starts With <input type="text"/></p> <p>Domains: Starts With <input type="text" value="ARS-BA"/> <input type="button" value="▼"/></p>
4.	Click Save As .	
5.	Enter a Saved Search ID and description. Click Submit	 <p>Saved Searches Search </p> <p>> Search > Save Search</p> <p>Save Search</p> <p>* = Required Fields</p> <p>* Saved Search ID: <input type="text" value="ARS-BA employees"/></p> <p>Description: <input type="text"/></p> <p style="text-align: right;"><input type="button" value="Submit"/> <input type="button" value="Reset"/></p>

Executing a Saved Search

Step	Activity	View
------	----------	------

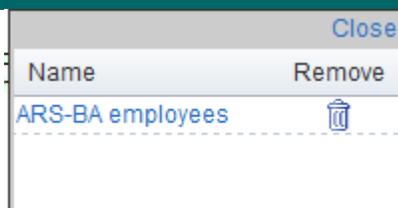
1. Select the **User Management** menu.



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

3. Click the **More Options** icon next to **Saved Searches**.

4. Select the saved Search you want to open.



5. The **Search** form appears, with the saved parameters already filled in. Edit as needed.

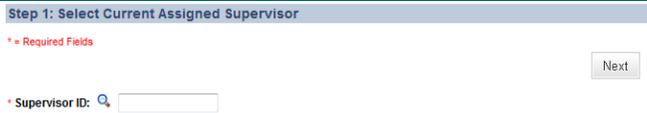
Case sensitive search:	<input type="radio"/> Yes <input checked="" type="radio"/> No
User ID:	Starts With <input type="text"/>
Last Name:	Starts With <input type="text"/>
First Name:	Starts With <input type="text"/>
Middle Initial:	Starts With <input type="text"/>
Role ID:	Starts With <input type="text"/>
User Status:	<input checked="" type="radio"/> Active <input type="radio"/> Not Active <input type="radio"/> Both
Email Address:	Starts With <input type="text"/>
Domains:	Starts With <input type="text" value="ARS-BA"/> <input type="button" value="Filter"/>

6. If you want to save any edits for future searches, click **Save**, or click **Save As** to save them under a different name.

7. Click **Search**.

Supervisor Assistant

The Supervisor assistant allows the AgLearn administrator to reassign *multiple* users from any supervisor to a new supervisor.

Step	Activity	View
1.	Select the User Management menu.	
2.	Select Tools .	
3.	Select Supervisor Assistant .	
4.	In the Supervisor ID text box, type the ID of the current supervisor, or click the Search icon to find and select one. Click Next	
5.	In the Supervisor ID text box, type the ID of the new supervisor, or click the Search icon to find and select one. Click Next	

6. All employees 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 **Add one or more from the list** link to use a search page and select multiple Users.

You can also remove user(s) from the Affected Users list by placing a checkmark in the Remove box and click Apply Changes.

Step 3: Add Users

Previous Next

* = Required Fields

Add Users

Enter User ID or add one or more from list.

* User ID:

Submit

Affected Users

Apply Changes

Select All / Deselect All

User ID	Name	Remove
RSZ88365	Spears, Rosita I	<input type="checkbox"/>
BM038265	Messer, Brenda C	<input type="checkbox"/>
CV037169	Voglesong, Christine A	<input type="checkbox"/>
MW038289	Weber, Mary M	<input type="checkbox"/>
MBZ497869	Brown, Michelle L	<input type="checkbox"/>
JS036982	Riddle, Jennifer S	<input type="checkbox"/>
CWZ168269	Walker, Catherine L	<input type="checkbox"/>
ELZ08265	Locker, Eleanora P	<input type="checkbox"/>

9. When you are satisfied the lists is complete, click **Next**.

Next

10. Review the information. The User records displayed should reflect the new supervisor. If satisfied, click **Finish**. If no satisfied, click **Previous** to return to Step 8.

Step 4: Complete

Previous Finish

Current Supervisor: VG037265 (Gramlich, Virginia C)
New Supervisor: TN037668 (Nykiel, Ted A)

Affected Users

User ID	Name
RSZ88365	Spears, Rosita I
BM038265	Messer, Brenda C
CV037169	Voglesong, Christine A
MW038289	Weber, Mary M
MBZ497869	Brown, Michelle L
JS036982	Riddle, Jennifer S
CWZ168269	Walker, Catherine L
ELZ08265	Locker, Eleanora P

Click "Finish" to complete this process and update the records.

Assign an Item to a To-Do List

Administrators can add or remove training directly from the User's To-Do List, as well as modify the 'Required By' dates for training already assigned.

Step	Activity	View
------	----------	------

1. Select **Users**.



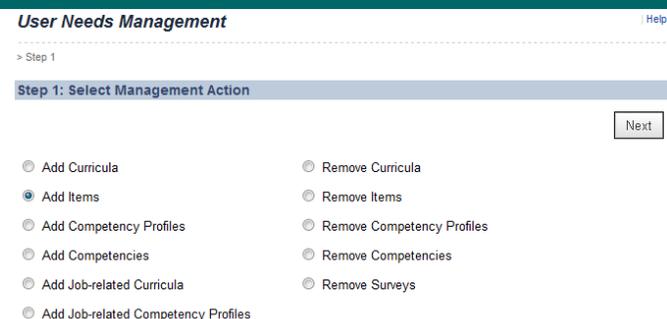
2. Select **Tools**.

Select **User Needs Mgmt**

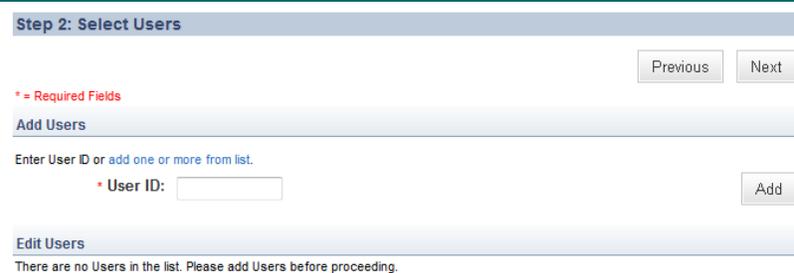


3. Select **Add Items**

Then click **Next**



4. You can manually add the User ID or click [add one or more from list](#) to do a search



5. Once the user has been located, click **Next** to continue

Step 2: Select Users

Previous Next

* = Required Fields

Add Users

Enter User ID or add one or more from list.

* User ID: Add

Edit Users

Apply Changes

Select All / Deselect All

User ID	Name	Remove
LW038276	Walker, Lyndell A	<input type="checkbox"/>

Select All / Deselect All

6. To add the item, manually type in the Item ID or click add [one or more from list](#) to do a search.

Step 3: Adding Items

Previous Next

* = Required Fields

Select Items for Adding

Enter 'Item ID' and 'Item Type' or add one or more from list.

* Type: * ID: Add

Edit the List of Items for Adding

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

7. Once the item has been located, click **Next** to continue

Step 3: Adding Items

Previous Next

* = Required Fields

Select Items for Adding

Enter 'Item ID' and 'Item Type' or add one or more from list.

* Type: * ID: Add

Edit the List of Items for Adding

Apply Changes

Select All / Deselect All

Item	Title	Assign. Type	Assign Date	Remove
Web Based MS-OFFICE2007-5425 (Rev 3/24/2009 12:00 AM America/New York)	Getting Started with Microsoft Office Excel 2007		9/25/2012	<input type="checkbox"/>

Select All / Deselect All

8. In the Edit Item Information section, you can choose the Assign Type (Mandated, Optional, Recommended, or Required)
- Click **Next** to continue

Step 4: Edit Item Information

Previous Next

Item	Title	Assign. Type	Assign Date (MM/DD/YYYY)
Web Based MS-OFFICE2007-5425 (Rev 3/24/2009 12:00 AM America/New York)	Getting Started with Microsoft Office Excel 2007	<input type="text"/>	<input type="text" value="9/25/2012"/>

- 9. Insert a Required Date to have the training completed.

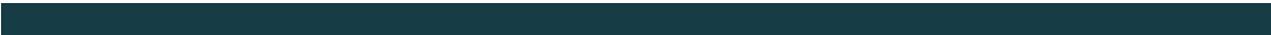
Once the information has been updated, click **Run Job Now**.

Step 5: Complete User Needs Management

Previous Run Job Now Schedule Job

User ID	Name
LW038276	Walker, Lyndell A

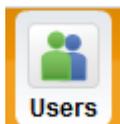
Item	Title	Assign Date	Required Date (MM/DD/YYYY)
Web Based MS-OFFICE2007-5425 (Rev 3/24/2009 12:00 AM America/New York)	Getting Started with Microsoft Office Excel 2007	9/25/2012	<input type="text"/>



Remove an Item from a To-Do List Record

Step **Activity** **View**

1. **Select Users**



2. **Select Tools.**

Select **User Needs Mgmt**



3. **Select Remove Items.**

Step 1: Select Management Action

Next

- 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
- Remove Competencies
- Remove Surveys

4. Add the User ID by either manually adding in the User ID or click [add one or more from list](#) to do a search

Step 2: Select Users

Previous

Next

* = Required Fields

Add Users

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

* User ID:

Add

Edit Users

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

5. Once the user has been located, click **Next** to continue

Step 2: Select Users

Previous

Next

* = Required Fields

Add Users

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

* User ID:

Add

Edit Users

Apply Changes

Select All / Deselect All

User ID	Name	Remove
LW038276	Walker, Lyndell A	<input type="checkbox"/>

Select All / Deselect All

- To add the item, manually type in the Item ID or click [add one or more from list](#) to do a search.

Step 3: Removing Items

Previous Run Job Now Schedule Job

* = Required Fields

Select Items for Removal

Enter 'Item ID' and 'Item Type' or [add one or more from list](#).

* Type: * ID:

Add

Edit the List of Items for Removal

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

- Click **Run Job Now** to remove the item from the To-Do List.

Step 3: Removing Items

Previous Run Job Now Schedule Job

* = Required Fields

Select Items for Removal

Enter 'Item ID' and 'Item Type' or [add one or more from list](#).

* Type: * ID:

Add

Edit the List of Items for Removal

Apply Changes

Select All / Deselect All

Item	Title	Assign. Type	Assign Date	Remove
Web Based MS-OFFICE2007-5425 (Rev 3/24/2009 12:00 AM America/New York)	Getting Started with Microsoft Office Excel 2007		9/25/2012	<input type="checkbox"/>

Managing Items

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

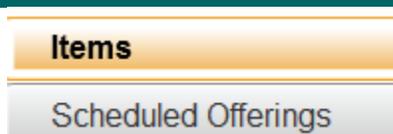
Viewing an Item Record

Step Activity View

1. Select the **Learning**.



2. Select **Items**.



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

Click **Search**

Items

Search > Search Results

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

Search

Case sensitive search: Yes No

Item Types:

Starts With

Item ID:

Starts With

Revision Date:

(MM/DD/YYYY)

Revision Number:

Starts With

Item Title:

Starts With

4. Select the Item ID to view the record

Item	Title
Classroom USDA-ISA-FY2012-LIVE (Rev 1 - 10/3/2011 10:27 AM America/New York)	FY2012 USDA Information Security Awareness Training (live session)
Classroom USDA-ISA-FY2013-LIVE (Rev 1 - 9/21/2012 12:45 PM America/New York)	FY2013 USDA Information Security Awareness Training (live session)
Document USDA-ISA-FY2012-PAPER (Rev 1 - 10/3/2011 10:29 AM America/New York)	FY2012 USDA Information Security Awareness Training (paper-based)

6. Click View All to see view the information about the item

FY2012 USDA Information Security Awareness Training (paper-based) Document USDA-ISA-FY2012-PAPER (Rev 1 - 10/3/2011...)

Description: The USDA Security Literacy and Basics Course introduces you to the basic concepts for computer security at USDA. Topics include: The Importance of Information Security, Threats and Vulnerabilities, Viruses and Malicious Code, and Roles and Responsibilities.

Source: Agency (Agency)	User can record Learning Events for thems... No
Supervisors can record Learning Events fo... No	Self Registration: Yes
Retraining Period:	Retraining Number:
Retraining Basis:	Registration Threshold Days:
Rating:	Min Registration:
Max Registration:	Item Goals: You will learn valuable safeguards in computer secu...
Initial Period:	Initial Number:

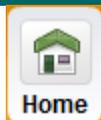
[View All](#)

Create an Item

You can use the Items section to create new and maintain existing learning items so that you can assign the items to users and track the completion status of those items by users.

Step Activity View

1. Select the **Home** button



2. Click **Add Item** from the Quick Links section

Quick Links

Add Item
Create any assignable unit of training. These can be either an online learning, instructor-led, a blended version of both, or an ad hoc learning exercise.

3. Select the item type. Then click **OK**

Please select the type of item you would like to add:

Scheduled Only
This item will be scheduled at specific dates and times, with the option to assign instructors and locations.
Example: Classroom course

Online Only
This item will have associated online content that can be launched and completed at any time.
Example: Web-based tutorial

Scheduled and Online
This item will contain both scheduled and online components.

Other
This item will be neither scheduled nor online, and actions must be taken outside of the system to complete it.
Example: Read a book

4. Fill in the required fields under Basic Information. Then click **Save & Exit**

Summary Change type of item

Enter Basic Information

*Required Fields

*Item Type:

*Item ID:

*Title:

Description:

*Domain ID:

Approval required to self-register

Approval Process:

Contact Hours:

Additional Options

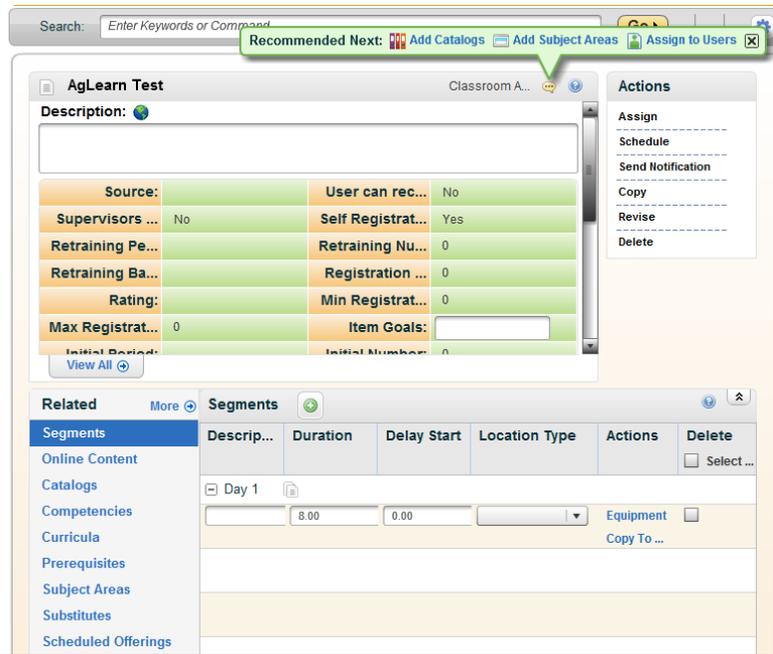
Schedule Template

Number of days:

Hours per day:

Use for more complex schedules.

5. This is the default view of the item.



6. Enter a **description** for the new item.

Description:

7. To view the elements of the item to make changes or up



8. Here you can add in the Max & Min Registration, activate the Auto Fill Registration feature, edit the length of the course and assign credit hours.

Any changes or updates must be saved by clicking the Saved button at the bottom.

Summary			
Source:		User can record Lea...	No
Supervisors can rec...	No	Self Registration:	Yes
Retraining Period:		Retraining Number:	0
Retraining Basis:		Registration Thresh...	0
Rating:		Min Registration:	0
Max Registration:	0	Item Goals:	<input type="text"/>
Initial Period:		Initial Number:	0
Initial Basis:		Include User Rating...	Yes
Enable Users to Wai...	Yes	Enable User Ratings:	No
Delivery Method:		Contact Hours:	0.00
Audience:	<input type="text"/>		
Comments:			
Active:	Yes	Auto Fill Registration:	No
Classification:	Instructor-Led	*Domain:	Agricultural Research
Approval Process:		Approval Required:	No
Assign. Type:		Contact's Email:	

9. The newest feature is the **Recommended Next**, which gives guided prompts to additions to the item.

Recommended Next: Add Catalogs Add Subject Areas Assign to Users

Classroom A... **Actions**

10. The **Actions** bar list all available actions associated with the created Item.

Actions

- Assign
- Schedule
- Send Notification
- Copy
- Revise
- Delete

11. The **Related** sections groups together aspects of the training such as the Catalog, Subject Areas and more.

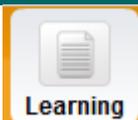
Related [More](#)

- Segments
- Online Content
- Catalogs
- Competencies
- Curricula
- Prerequisites
- Subject Areas
- Substitutes
- Scheduled Offerings

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.

Then click **Search**

Case sensitive search: Yes No

Item Types: Starts With

Item ID: Starts With

Revision Date: (MM/DD/YYYY)

Revision Number: Starts With

Item Title: Starts With AgLearn Test

4. From the Results section, click the **Item Title**.

Item	Title
Classroom ARS-AgLearn-Test (Rev 1 - 10/2/2012 11:23 AM America/New York)	AgLearn Test

5. Click **View All** to view all components of the item.

Any changes made, click **Save**.

AgLearn Test Classroom ARS-AgLearn...

Description:

Source:		User can record Learn...	No
Supervisors can recor...	No	Self Registration:	Yes
Retraining Period:		Retraining Number:	
Retraining Basis:		Registration Threshol...	
Rating:		Min Registration:	
Max Registration:		Item Goals:	

[View All](#)

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. Then click Search	<p>Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Item Types: <input type="text" value="Starts With"/> <input type="text"/> </p> <p>Item ID: <input type="text" value="Starts With"/> <input type="text"/></p> <p>Revision Date: (MM/DD/YYYY)  <input type="text"/></p> <p>Revision Number: <input type="text" value="Starts With"/> <input type="text"/></p> <p>Item Title: <input type="text" value="Starts With"/> <input type="text" value="AgLearn Test"/></p>				
4.	From the Results section, click the Item Title .	<table border="1"> <thead> <tr> <th>Item ▲</th> <th>Title</th> </tr> </thead> <tbody> <tr> <td>Classroom ARS-AgLearn-Test (Rev 1 - 10/2/2012 11:23 AM America/New York)</td> <td>AgLearn Test</td> </tr> </tbody> </table>	Item ▲	Title	Classroom ARS-AgLearn-Test (Rev 1 - 10/2/2012 11:23 AM America/New York)	AgLearn Test
Item ▲	Title					
Classroom ARS-AgLearn-Test (Rev 1 - 10/2/2012 11:23 AM America/New York)	AgLearn Test					
5.	Click Copy in the Actions section.	<div style="border: 1px solid gray; padding: 5px;"> <p>Actions</p> <p>Assign</p> <p>-----</p> <p>Schedule</p> <p>-----</p> <p>Send Notification</p> <p>-----</p> <p>Copy</p> <p>-----</p> <p>Revise</p> <p>-----</p> <p>Delete</p> </div>				

- 6. Select the new Item type and Item ID and place a checkmark in appropriate categories, Especially **Add the new item to the catalog**

Then click **Copy**

Copy Item

Old Item Type ID: Classroom
Old Item ID: ARS-AgLearn-Test
Old Revision Date: 10/2/2012 11:23 AM America/New York
New Item Type ID: Classroom
New Item ID:
New Revision Date: 10/2/2012
Revision Time: 02:02 PM
Time Zone: Eastern Standard Time (America/New York)

Copy Authorized to Instruct Data
 Copy Substitutes Data
 Copy Related Competency Data
 Copy Related Document Data
 Copy Related Task Data
 Copy Prerequisite Data
 Copy Request Data
 Copy Online Settings
 Copy Instructor Costs
 Add the new item to the catalog

Copy Reset

- 7. This is the new created Item. Follow the steps for editing an Item record to make updates to the item.

AgLearn Test 2 Classroom A...

Description:

Source:		User can rec...	No
Supervisors ...	No	Self Registrat...	Yes
Retraining Pe...		Retraining Nu...	
Retraining Ba...		Registration ...	
Rating:		Min Registrat...	
Max Registrat...		Item Goals:	<input type="text"/>
Initial Period:		Initial Number	

View All

Save Cancel

Marking an Item Record as Inactive

Step	Activity	View																				
1.	Select the Learning menu.																					
2.	Select Items .																					
3.	On the Search screen, enter the appropriate search criteria. Then click Search	<p>Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Item Types: Starts With <input type="text"/> </p> <p>Item ID: Starts With <input type="text"/></p> <p>Revision Date: (MM/DD/YYYY)  <input type="text"/></p> <p>Revision Number: Starts With <input type="text"/></p> <p>Item Title: Starts With <input type="text"/> AgLearn Test</p>																				
4.	From the Results section, click the Item Title .	<table border="1"> <thead> <tr> <th>Item </th> <th>Title</th> </tr> </thead> <tbody> <tr> <td>Classroom ARS-AgLearn-Test (Rev 1 - 10/2/2012 11:23 AM America/New York)</td> <td>AgLearn Test</td> </tr> </tbody> </table>	Item 	Title	Classroom ARS-AgLearn-Test (Rev 1 - 10/2/2012 11:23 AM America/New York)	AgLearn Test																
Item 	Title																					
Classroom ARS-AgLearn-Test (Rev 1 - 10/2/2012 11:23 AM America/New York)	AgLearn Test																					
5.	Click the drop down in the Active section and select No . Then click Save .	<table border="1"> <tbody> <tr> <td>Comments:</td> <td colspan="3"></td> </tr> <tr> <td>Active:</td> <td>Yes</td> <td>Auto Fill Regi...</td> <td>No</td> </tr> <tr> <td>Classification:</td> <td>No</td> <td>*Domain:</td> <td>Agricultural Resea</td> </tr> <tr> <td></td> <td>Yes</td> <td></td> <td></td> </tr> <tr> <td colspan="4">View All </td> </tr> </tbody> </table>	Comments:				Active:	Yes	Auto Fill Regi...	No	Classification:	No	*Domain:	Agricultural Resea		Yes			View All 			
Comments:																						
Active:	Yes	Auto Fill Regi...	No																			
Classification:	No	*Domain:	Agricultural Resea																			
	Yes																					
View All 																						

Delete an Item Record

Step	Activity	View				
1.	Select the Learning menu.					
2.	Select Items.					
3.	On the Search screen, enter the appropriate search criteria. Then click Search	<p>Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Item Types: Starts With <input type="text"/> </p> <p>Item ID: Starts With <input type="text"/></p> <p>Revision Date: (MM/DD/YYYY)  <input type="text"/></p> <p>Revision Number: Starts With <input type="text"/></p> <p>Item Title: Starts With <input type="text"/> AgLearn Test</p>				
4.	From the Results section, click the Item Title .	<table border="1"> <thead> <tr> <th>Item </th> <th>Title</th> </tr> </thead> <tbody> <tr> <td>Classroom ARS-AgLearn-Test (Rev 1 - 10/2/2012 11:23 AM America/New York)</td> <td>AgLearn Test</td> </tr> </tbody> </table>	Item 	Title	Classroom ARS-AgLearn-Test (Rev 1 - 10/2/2012 11:23 AM America/New York)	AgLearn Test
Item 	Title					
Classroom ARS-AgLearn-Test (Rev 1 - 10/2/2012 11:23 AM America/New York)	AgLearn Test					
5.	In the Actions section , click Delete	<div style="border: 1px solid gray; padding: 5px;"> <p>Actions</p> <p>Assign -----</p> <p>Schedule -----</p> <p>Send Notification -----</p> <p>Copy -----</p> <p>Revise -----</p> <p>Delete</p> </div>				
6.	Click Yes to delete the Item.	<div style="border: 1px solid gray; padding: 10px;"> <p>Delete Item</p> <p> Are you sure you want to delete this Item?</p> <p style="text-align: center;"> <input type="button" value="Yes"/> <input type="button" value="No"/> </p> </div>				

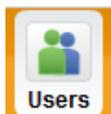
Managing Learning Events

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.**

View a Learner's Completed Work

Step Activity View

1. Select the **Users**



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



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

Then click **Search**

add or remove search criteria to further refine your search.

Search

Case sensitive search: Yes No

User ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Role ID: Starts With

4. Click the **User ID**

User ID	User Name
LW038276	Walker, Lyndell A.

5. Click **Completed Work**

Related More

- [Competencies](#)
- [Competency Profiles](#)
- [Completed Work](#)
- [Curricula](#)
- [SF-182s](#)

6. View the employees Completed Work

FY2013 USDA Information Security Awareness Training Pre-Test	Web Based Complete	10/1/2012	View Details
			Object Details
FY2013 USDA Information Security Awareness Training	Web Based Complete	10/1/2012	View Details
AgLearn+ Basic Administrator	Web Based Complete	8/16/2012	View Details
			Object Details
AgLearn July 2012 Workshop - Virtual Access	Virtual Classroom Completed	7/20/2012	View Details
Updating Your VPN Client Configuration	Web Based Complete	7/12/2012	View Details
			Object Details

Edit a Learning Event

Step Activity View

1. Select the **Users**



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



3. Select **Learning Event Editor**



4. Enter the user ID, if known. Otherwise, click the Blue filter icon to perform a search for a user.

Then click **Search**

Case sensitive search: Yes No

User ID: Starts With

Item Description: Starts With

Completed Date After: (MM/DD/YYYY)

Completed Date Before: (MM/DD/YYYY)

Type of Learning Event: Items External Events Both

Items: Exact Type:
ID:

Schedules: Starts With

[Add/Remove Criteria](#)

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

User ID	User Name	Item	Description	Completion Date	Completion Status
LW038276	Walker, Lyndell A	Web Based USDA-ISA-FY2013-PRETEST (Rev 1 - 9/24/2012 09:26 AM America/New York)	FY2013 USDA Information Security Awareness Training Pre-Test	10/1/2012 02:53 PM America/New York	Web Based Complete
LW038276	Walker, Lyndell A	Web Based USDA-ISA-FY2013 (Rev 1 - 9/21/2012 02:04 PM America/New York)	FY2013 USDA Information Security Awareness Training	10/1/2012 02:53 PM America/New York	Web Based Complete
LW038276	Walker, Lyndell A	Web Based AgLearn6.4-BasicAdmin (Rev 1 - 8/2/2012 01:28 PM America/New York)	AgLearn+ Basic Administrator	8/16/2012 10:19 AM America/New York	Web Based Complete

6. Select the **Edit** link corresponding to the desired event.

LW038276	Walker, Lyndell A	Web Based AgLearn6.4-BasicAdmin (Rev 1 - 8/2/2012 01:28 PM America/New York)	AgLearn+ Basic Administrator	8/16/2012 10:19 AM America/New York	Web Based Complete
----------	-------------------	---	------------------------------	-------------------------------------	--------------------

7. From the Edit the Learning Event screen, edit the details of the completed work.

Then click Apply Changes.

Edit the Learning Event

[File Attachments \(0\)](#)

Instructor ID:  

Instructor Name:

Grade:

Completion Status:

Completion Date:  8/16/2012
(MM/DD/YYYY)

Completion Time:
(hh:mm AM/PM)

Time Zone:

Delete a Learning Event

Step Activity View

1. Select the **Users**



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



3. Select **Learning Event Editor**



4. Enter the user ID, if known. Otherwise, click the Blue filter icon to perform a search for a user.
- Then click **Search**

Case sensitive search: Yes No

User ID: Starts With

Item Description: Starts With

Completed Date After: (MM/DD/YYYY)

Completed Date Before: (MM/DD/YYYY)

Type of Learning Event: Items External Events Both

Items: Exact Type:
ID:

Schedules: Starts With

Add/Remove Criteria

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

Click the Edit link to the corresponding event

LW038276		Walker, Lyndell A	Web Based MS-OFFICE2007-5436 (Rev 3/24/2009 12:00 AM America/New York)	Printing, Reviewing, Sharing, and Delivering a Presentation in Microsoft Office PowerPoint 2007	1/5/2010 08:17 AM America/New York	Web Based Complete
LW038276		Walker, Lyndell A	Classroom ARS New Employee Orientation (Rev 5/12/2006 11:24 AM America/New York)	New Employee Orientation	12/14/2009 04:30 PM America/New York	Class Completed

6. Select Delete

Edit the Learning Event

[File Attachments \(0\)](#)

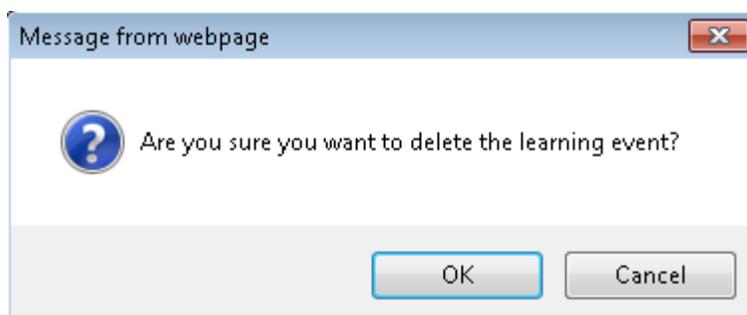
Instructor ID:

Instructor Name:

Grade:

Completion Status:

7.. Click **Delete**



8. Click **Continue**

Learning Event Removed

The learning event has been successfully removed.

Continue

Record a Learning Event for an Item

Step Activity View

1. Select the **Users**



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



3. Select **Learning Event Recorder Multiple**

Record Learning - Financial
Record Learning - Multiple
Learning Event Editor

4. Select the Item option.

What kind of learning you want to record?

Item Scheduled Offering External Event

Note: this is the default section

5. Click the **Search icon** next to Item ID to search for the item.

Search & Add Items

Item Type ID:

Item ID:

Add

6. Insert the search parameters for the Item.

Search

Keyword:

Revision Date: (MM/DD/YYYY)

Revision Number: Starts With

Item Title: Contains

Then click Search

7. Place a checkmark for each item.

Web Based **AgLearn6.4-Introduction** (Rev 9/10/2012 10:07 AM America/New York) AgLearn+ Introduction

8. Click Add

Add

9. If the User ID is known, place in the User ID section or click the Magnifying icon to search for the user(s).

Search & Add Items	Search & Add Users						
Item Type ID: <input type="text"/> Item ID: <input type="text"/> <input type="button" value="Add"/> List of Selected Items <table border="1"> <thead> <tr> <th>Item</th> <th>Title</th> <th></th> </tr> </thead> <tbody> <tr> <td>Web Based AgLearn6.4-Introduction (Rev 1 - 9/10/2012 10:07 AM America/New York)</td> <td>AgLearn+ Introduction</td> <td><input type="button" value="Remove"/></td> </tr> </tbody> </table>	Item	Title		Web Based AgLearn6.4-Introduction (Rev 1 - 9/10/2012 10:07 AM America/New York)	AgLearn+ Introduction	<input type="button" value="Remove"/>	User ID: <input type="text"/> <input type="button" value="Add"/> List of Selected Users There are no Users in the list. Please add Users before proceeding.
Item	Title						
Web Based AgLearn6.4-Introduction (Rev 1 - 9/10/2012 10:07 AM America/New York)	AgLearn+ Introduction	<input type="button" value="Remove"/>					

10. Add the employee first and/or last name in appropriate section(s).

Click **Search**.

Keyword:

Last Name: Starts With

First Name: Starts With

11. Place a checkmark in the Add box then click **Add**.

[Select All / Deselect All](#)

User ID	User Name	Add
SG038376	Gibson Brooks, Sherell A	<input checked="" type="checkbox"/>

[Select All / Deselect All](#)

12. Click **Next** to continue.

This wizard is to record Completed Work for multiple users for one or more items, scheduled offerings or external events. Simply indicate the type of learning to record, select the related items, scheduled offerings or external event to be recorded for each, and specify the users for whom you want to record the Completed Work.

What kind of learning you want to record?

Item Scheduled Offering External Event

Search & Add Items

Item Type ID:

Item ID:

List of Selected Items

Item	Title	Remove
Web Based AgLearn6.4-Introduction (Rev 1 - 9/10/2012 10:07 AM America/New York)	AgLearn+ Introduction	Remove

Search & Add Users

User ID:

List of Selected Users

User ID	Name	Remove
SG038376	Gibson Brooks, Sherell A	Remove
LW038276	Walker, Lyndell A	Remove

13. Click the calendar icon to choose a completion date for the training.

Edit Details

Group By:

* = Required Fields

Item	* Completion Date (MM/DD/YYYY)	* Time (hh:mm AM/PM)	* Time Zone
Web Based AgLearn6.4-Introduction (Rev 1 - 9/10/2012 10:07 AM America/New York)	<input type="text" value="10/3/2012"/>	<input type="text" value="10:07 AM"/>	<input type="text" value="Eastern Standard Time (America/New York)"/>

14. Choose a completion status for the training. Update credit or contact time if needed.

Then click **Apply Changes** to an updates.

Grade / Completion	Total Hrs (1000,001.01)	Credit Hrs (1000,001.01)	Contact Hrs (1000,001.01)
<input type="text" value="*"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="1.25"/>

15. Click Next to proceed to

16. Review the information on the final review screen

Change the way competencies are assessed

Assess based on item setting
 Assess all items
 Do Not Assess

Item: Web Based **AgLearn6.4-Introduction** (Rev 1 - 9/10/2012 10:07 AM America/New York)

Title: AgLearn+ Introduction

User ID	User Name	Grade / Completion	Completion Date	Total Hours	Credit Hours	Contact Hours	CPE	Comments
LW038276	Walker, Lyndell A	Web Based Complete	9/13/2012 10:07 AM America/New York			1.25		
SG038376	Gibson Brooks, Sherell A	Web Based Complete	9/13/2012 10:07 AM America/New York			1.25		

17. Once the review has been made, click **Submit**.

Previous

Submit

If any changes need to be made, click **Previous**.

26. The Item has been recorded in the employees Completed Work.

Record Learning - Multiple

Initial Information > Edit Details > Confirm > Success

The Learning events were recorded successfully.

Start Over...

Record a Learning Event for an Item via the Quick Links

Step **Activity** **View**

1. Select **Home**



2. Under the **Quick Links** section, select **Record Learning Multiple**.



Record Learning - Multiple

Store the completion of a course or any other learning related Item, including scheduled offerings

3. Select the Item option.

What kind of learning you want to record?

Item Scheduled Offering External Event

Note: this is the default section

4. Click the **Search icon** next to Item ID to search for the item.

Search & Add Items

Item Type ID:

Item ID:

5. Insert the search parameters for the Item.

Keyword:

Revision Date: (MMDD/YYYY)

Revision Number: Starts With

Item Title: Contains

Then click Search

6. Place a checkmark for each item.

Web Based AgLearn6.4-Introduction (Rev 9/10/2012 10:07 AM America/New York)	AgLearn+ Introduction	<input checked="" type="checkbox"/>
---	-----------------------	-------------------------------------

7. Click Add



8. If the User ID is known, place in the User ID section or click the Magnifying icon to search for the user(s).

<p>Search & Add Items</p> <p>Item Type ID: <input type="text"/></p> <p>Item ID: <input type="text"/> <input type="button" value="Add"/></p> <p>List of Selected Items</p> <table border="1"> <thead> <tr> <th>Item</th> <th>Title</th> <th></th> </tr> </thead> <tbody> <tr> <td>Web Based AgLearn6.4-Introduction (Rev 1 - 9/10/2012 10:07 AM America/New York)</td> <td>AgLearn+ Introduction</td> <td>Remove</td> </tr> </tbody> </table>	Item	Title		Web Based AgLearn6.4-Introduction (Rev 1 - 9/10/2012 10:07 AM America/New York)	AgLearn+ Introduction	Remove	<p>Search & Add Users</p> <p>User ID: <input type="text"/> <input type="button" value="Add"/></p> <p>List of Selected Users</p> <p>There are no Users in the list. Please add Users before proceeding.</p>
Item	Title						
Web Based AgLearn6.4-Introduction (Rev 1 - 9/10/2012 10:07 AM America/New York)	AgLearn+ Introduction	Remove					

9. Add the employee first and/or last name in appropriate section(s).

Search

Click **Search**.

Keyword:

Last Name: Starts With

First Name: Starts With

10. Place a checkmark in the Add box then click **Add**.

User ID	User Name	Add
SG038376	Gibson Brooks, Sherell A	<input checked="" type="checkbox"/>

Select All / Deselect All

Add

11. Click **Next** to continue.

Next

This wizard is to record Completed Work for multiple users for one or more items, scheduled offerings or external events. Simply indicate the type of learning to record, select the related items, scheduled offerings or external event to be recorded for each, and specify the users for whom you want to record the Completed Work.

What kind of learning you want to record?
 Item Scheduled Offering External Event

Search & Add Items
 Item Type ID:
 Item ID: Add

List of Selected Items

Item	Title	Remove
Web Based AgLearn6.4-Introduction (Rev 1 - 9/10/2012 10:07 AM America/New York)	AgLearn+ Introduction	Remove

Search & Add Users
 User ID: Add

List of Selected Users

User ID	Name	Remove
SG038376	Gibson Brooks, Sherell A	Remove
LW038276	Walker, Lyndell A	Remove

12. Click the calendar icon to choose a completion date for the training.

Edit Details
 Group By: Item

* = Required Fields

Item	* Completion Date (MM/DD/YYYY)	* Time (hh:mm AMPM)	* Time Zone
Web Based AgLearn6.4-Introduction (Rev 1 - 9/10/2012 10:07 AM America/New York)	10/3/2012	10:07 AM	Eastern Standard Time (America/New York)

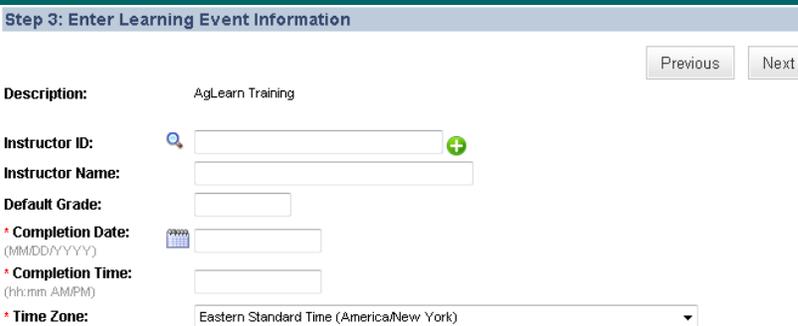
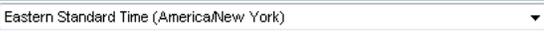
13. Choose a completion status for the training. Update credit or contact time if needed.

* Grade / Completion	Total Hrs (1000,001.01)	Credit Hrs (1000,001.01)	Contact Hrs (1000,001.01)
<input type="text"/>	<input type="text"/>	<input type="text"/>	1.25

Apply Changes

Then click **Apply Changes** to an updates.

Record a Learning Event for an External Event

Step	Activity	View
1.	Select the Users	
2.	Select Tools from the left menu	
3.	Select Learning Event Recorder Financial	
4.	Select the External Event option.	
5.	Enter the title of the event in the Description field. The click Next	 <p>Step 2: Enter External Event Description</p> <p>Previous Next</p> <p>* = Required Fields</p> <p>* Description: <input type="text"/></p>
6.	Instructor & Default Grade are rarely used. Enter Completion Date & Time .	 <p>Step 3: Enter Learning Event Information</p> <p>Previous Next</p> <p>Description: AgLearn Training</p> <p>Instructor ID: <input type="text"/>  </p> <p>Instructor Name: <input type="text"/></p> <p>Default Grade: <input type="text"/></p> <p>* Completion Date:  <input type="text"/> (MM/DD/YYYY)</p> <p>* Completion Time: <input type="text"/> (hh:mm AM/PM)</p> <p>* Time Zone: Eastern Standard Time (America/New York) </p>
7.	Click the Completion Date selection icon to select and enter a completion date.	 <p>* Completion Date: <input type="text"/> (MM/DD/YYYY)</p>
8.	Enter the completion time in the Completion Time field.	 <p>* Completion Time: <input type="text"/> (hh:mm AM/PM)</p>
9.	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.	 <p>* Time Zone: Eastern Standard Time (America/New York) </p>

10. Enter the Default Price in the **Default Price** field, if applicable.

Default Price :
(1000,001.01)

Currency ID:
(1000,001.01)

Total Hours:
(1000,001.01)

Credit Hours:
(1000,001.01)

Contact Hours:
(1000,001.01)

CPE:
(1000,001.01)

11. 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.

Total Hours:
(1000,001.01)

12. Enter the total number of credit hours that the Users will receive for completing this Item in the **Credit Hours** field.
Note: Credit Hours indicate the number of unit hours printed on a Certificate (i.e., number of CEUs, CMEs, etc.).

Credit Hours:
(1000,001.01)

13. 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.

Contact Hours:
(1000,001.01)

14. 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.

CPE:
(1000,001.01)

15. Click **Next** to continue

16. If the User ID is known, type it in the field, select the **Add one or more from list** link to search for and enter Users.

Add Users

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

*** User ID:**

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

Then click Search

Keyword:

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

18. Place a checkmark in the add box and click **Add**

Select All / Deselect All		
User ID	Name	Add
SG038376	Gibson Brooks, Sherell A	<input checked="" type="checkbox"/>

Select All / Deselect All

19. Once the users have been added, click **Next**.

* = Required Fields

Add Users

Enter User ID or add one or more from list

* User ID:

Edit Selected Users

Select All / Deselect All

User ID	Name	Remove
SG038376	Gibson Brooks, Sherell A	<input type="checkbox"/>
LW038276	Walker, Lyndell A	<input type="checkbox"/>

20. If any comments are needed, and it here at this screen.

Step 5: Edit User Event Information

User	Comments	Grade
SG038376 (Gibson Brooks, Sherell A)	<input type="text"/>	<input type="text"/>
LW038276 (Walker, Lyndell A)	<input type="text"/>	<input type="text"/>

Click **Next** to continue

21. If there was a cost for the training, enter the cost at this screen.

Step 6: Edit User Event Financial Information

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

User	Price (1000,001.01)	Currency	Cost Center Account Codes
SG038376 (Gibson Brooks, Sherell A)	<input type="text" value="0.00"/>	USD (US Dollar)	<input type="text"/>
LW038276 (Walker, Lyndell A)	<input type="text" value="0.00"/>	USD (US Dollar)	<input type="text"/>

Click **Next** to Continue.

22. Click Finish to complete the Learning Event.

External Event: AgLearn Test

Instructor:

Completion Date: 9/3/2012 03:00 PM America/New York

Contact Hours:

Total Hours: 8.00
CPE: **Credit Hours:** 8.00

User	Grade	Comments	Cost Centers	Price
SG038376 (Gibson Brooks, Sherell A)				0.00 USD (US Dollar)
LW038276 (Walker, Lyndell A)				0.00 USD (US Dollar)

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

Record an External Learning Event via the Quick Links

Step **Activity** **View**

1. Select **Home**



2. Under the **Quick Links** section, select **Record Learning - Financial**.



Record Learning - Financial

Store the completion of a course or any other learning related Item, including scheduled offerings (allows for adding

3. Select the **External Event** option.



4. Enter the title of the event in the **Description** field.

Step 2: Enter External Event Description

Previous Next

The click Next

* = Required Fields

* Description:

5. **Instructor & Default Grade** are rarely used. Enter **Completion Date & Time**.

Step 3: Enter Learning Event Information

Previous Next

Description: AgLearn Training

Instructor ID:  

Instructor Name:

Default Grade:

* Completion Date: 
(MM/DD/YYYY)

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

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

6. Click the **Completion Date** selection icon to select and enter a completion date.

* Completion Date:
(MM/DD/YYYY)



7. Enter the completion time in the **Completion Time** field.

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

8. 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:

Eastern Standard Time (America/New York) 

9. Enter the Default Price in the **Default Price** field, if applicable.

Default Price :
(1000,001.01)

Currency ID:

Total Hours:
(1000,001.01)

Credit Hours:
(1000,001.01)

Contact Hours:
(1000,001.01)

CPE:
(1000,001.01)

10. 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.

Total Hours:
(1000,001.01)

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

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

Credit Hours:
(1000,001.01)

12. 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.

Contact Hours:
(1000,001.01)

13. 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.

CPE:
(1000,001.01)

14. Click **Next** to continue

15. If the User ID is known, type it in the field, select the **Add one or more from list** link to search for and enter Users.

[Add Users](#)

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

* **User ID:**

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

Keyword:
Last Name: Starts With
First Name: Starts With
Middle Initial: Starts With

Then click Search

17. Place a checkmark in the add box and click **Add**

User ID	Name	<input type="checkbox"/>
SG038376	Gibson Brooks, Sherell A	<input checked="" type="checkbox"/>

[Select All / Deselect All](#)
[Add](#)

18. Once the users have been added, click **Next**.

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

*** = Required Fields**

Add Users

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

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

Edit Selected Users

[Apply Changes](#)

User ID	Name	<input type="checkbox"/>
SG038376	Gibson Brooks, Sherell A	<input type="checkbox"/>
LW038276	Walker, Lyndell A	<input type="checkbox"/>

[Select All / Deselect All](#)

19. If any comments are needed, and it here at this screen.

Click **Next** to continue

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

Step 5: Edit User Event Information

User	Comments	Grade
SG038376 (Gibson Brooks, Sherell A)	<input type="text"/>	<input type="text"/>
LW038276 (Walker, Lyndell A)	<input type="text"/>	<input type="text"/>

20. If there was a cost for the training, enter the cost at this screen.

Click **Next** to Continue.

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

Step 6: Edit User Event Financial Information

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

User	Price (1000,001.01)	Currency	Cost Center Account Codes
SG038376 (Gibson Brooks, Sherell A)	<input type="text" value="0.00"/>	<input type="text" value="USD (US Dollar)"/>	<input type="text"/>
LW038276 (Walker, Lyndell A)	<input type="text" value="0.00"/>	<input type="text" value="USD (US Dollar)"/>	<input type="text"/>

[Edit](#)

21. Click Finish to complete the Learning Event.

[Previous](#) [Finish](#)

Step 7: Record Event

External Event: AgLearn Test
Instructor:
Completion Date: 9/3/2012 03:00 PM America/New York
Contact Hours:

Total Hours: 8.00
CPE: **Credit Hours:** 8.00

User	Grade	Comments	Cost Centers	Price
SG038376 (Gibson Brooks, Sherell A)				0.00 USD (US Dollar)
LW038276 (Walker, Lyndell A)				0.00 USD (US Dollar)

Reports

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. Users can access the reporting tools by clicking the Reports menu on the top navigation bar, then choosing the report needed by clicking the appropriate browse and search functionality to the left of the screen.

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.

Reports can return information in a browser window, or to a local file. The formats available include, CSV (Comma-Separated Values), HTML (Hypertext Markup Language, the standard for browsers), and PDF (Portable Document Format, also known as Adobe Acrobat).

Note: The number and type of reports a user is allowed to access will vary depending upon the user's permissions within AgLearn.

The screenshot shows a search interface with the following elements:

- Search:** A text input field.
- Browse By:** A section header.
- Category (Admin only):** A list of categories with checkboxes:
 - User Management
 - Performance
 - Learning
 - Content
 - System Admin
 - Miscellaneous
- Application:** A list of applications with checkboxes:
 - Admin
 - User
- Submit:** A yellow button at the bottom right.

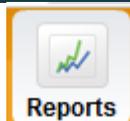
- 1) **User Management:** contains Certificate of Completion, Completed Work & Item Status reports.
- 2) **Performance:** contains competency and user To-Do list reports.
- 3) **Learning:** contains reports related to Scheduled Offering, Item and Curricula's.
- 4) **Content:** contains reports related to the exam portion of user training.
- 5) **System Admin:** contains reports related to SF-182 approvals, facilities and locations
- 6) **Miscellaneous:** contains reports related to Mandatory trainings, class roster and etc.

Run a Class Roster Report

You can run a class roster for a Scheduled Offering and use it as a sign-in sheet or roster to check to see who actually attended the class.

Step	Activity	View
------	----------	------

1. Select the **Reports** link.



2. Type "Roster" in the Search and click Submit.

3. Select **Scheduled Offering Roster** report

4. Enter the parameters for the search.

Report Destination can be Browser, Local File or Remote File.

Report Format is HTML or PDF

Run Scheduled Offering Roster

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

Scheduled Offering:

(1000,001)

Mask User IDs

5. Click the blue filter icon to search for the Scheduled Offering

Scheduled Offering:

(1000,001)

Mask User IDs

6. Enter the Scheduled Offering ID number or Item ID.

Then Click **Search**.

Search Scheduled Offerings

Case sensitive search: Yes No

Offering Type: Item offering type Schedule Block offering type

Scheduled Offering ID:

Item/Schedule Block ID:

Description:

Start Date After: (MM/DD/YYYY)

Start Date Before: (MM/DD/YYYY)

Status: Active Not Active Both

7. Place a checkmark for the Scheduled Offerings and click **Add to Filter** at the top of the page.

30306	AgLearn 6.4 Administrator Training	Web Based ARS-AgLearn6.4 Admin Training (Rev 1 - 8/24/2012 04:33 PM America/New York)	<input checked="" type="checkbox"/>
30305	AgLearn 6.4 Administrator Training	Web Based ARS-AgLearn6.4 Admin Training (Rev 1 - 8/24/2012 04:33 PM America/New York)	<input checked="" type="checkbox"/>

8. Click **Submit Filter** to return to the Reports page.

► Filter: 2 Scheduled Offeri...

9. Click **Run Report**

Run Scheduled Offering Roster

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

Scheduled Offering: (1000,001)

Mask User IDs

10. You have the option to have the report emailed to you by click **Email when Complete** or can keep this page open and the report will load when finished.

Please wait...

Report Title: Scheduled Offering Roster
Status: Waiting in Queue

Your report is in the queue and will start automatically as long as you do not close this page. (If you close the page, the report will be automatically cancelled.) If you do not wish to wait on this page for your report, you can choose one of the options below.

11. Displayed is the report.

Schedule				
Scheduled Offering ID	30305			
Title	AgLearn 6.4 Administrator Training			
Item	Web Based ARS-AgLearn6.4 Admin Training (Rev 8/24/2012 04:33 PM America/New York)			
Segment	Start Date/Time	End Date/Time	Instructor	Location
1	9/12/2012 01:00 PM America/New York	9/12/2012 03:30 PM America/New York		
User Name	Supervisor	Signature	Date	
Peterson, Caroline L	Hatfield, Jerry L	*****		
Subatch, Dona M	Deppe, Kan L	*****		
Parker, Elizabeth V	Butler, Casandra V	*****		
Lewandowski, Heather L	Oliver, Melvin J	*****		
Freestone, Jean A	Wertz, Mark A	*****		
McClintock, Janelle E	Magill, Robert H	*****		
Overton, Janet L	Lay, Donald C	*****		
Pannell, Jeffrey L	Quilantan, Joseph R	*****		

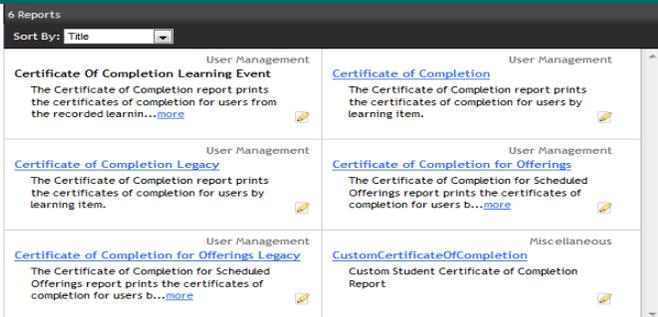
Run a Certificate of Completion Report

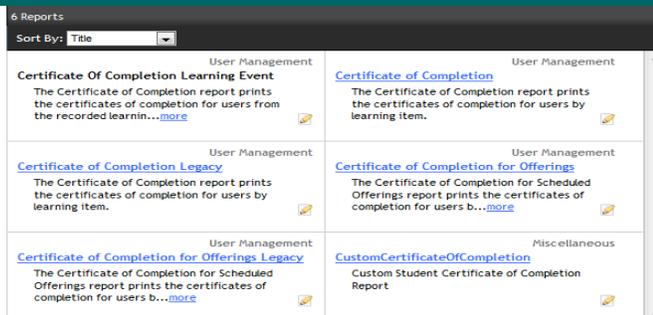
AgLearn has the capability to produce a Certificate of Completion using the Report function. Users can also print a Certificate of Completion by going to the Learning History tab, and clicking the Print Certificate button located on the right of the learning event.

Step	Activity	View
------	----------	------

- | | | |
|----|---------------------------------|---|
| 1. | Select the Reports link. |  |
|----|---------------------------------|---|



- | | | |
|----|---|--|
| 2. | Type Certificate in the Search and click Submit. Select Certificate of Completion |  |
|----|---|--|



- | | | |
|----|--|--|
| 3. | Completion Date can be left blank by default | <h3>Run Certificate of Completion</h3> <hr/> |
|----|--|--|

Report Destination can be Browser, Local File or Remote File.

Report Format is HTML or PDF

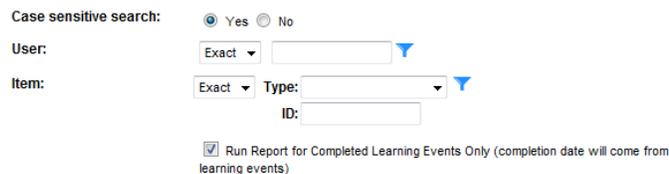
Report Title:

Signature Text:

Completion Date: (MM/DD/YYYY)

Report Destination:

Report Format:

- | | | |
|----|--|--|
| 4. | Click the blue filter icon to do a search for the employee |  |
|----|--|--|

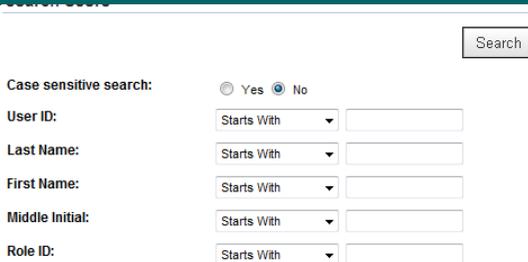
Case sensitive search: Yes No

User: Exact 

Item: Exact Type: 

ID:

Run Report for Completed Learning Events Only (completion date will come from learning events)

- | | | |
|----|---|--|
| 5. | Enter the employee information into the search. |  |
|----|---|--|

Then click Search.

Case sensitive search: Yes No

User ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Role ID: Starts With

6. Place a checkmark in the **Select** box.

Click **Add to Filter** to add the employee to the report.

Click **Submit Filter**.

Certificate of Completion

Filter: 1 Users

Select Users from list
Walker, Lyndell A(LW038276)

As you select records to include in your filter, they will appear in the Filter List. Select **Submit Filter** when ready to submit the filter and return to your base search criteria

<< Search Again

User ID	User Name	Job Location	Organization ID	Select
LW038276	Walker, Lyndell A		030103	<input checked="" type="checkbox"/>

7. If the title for the training is not known, the Item field can be left blank. This will complete a report with the employees entire completed work

Case sensitive search: Yes No

User: [1 Selected]

Item: Exact
ID:

Run Report for Completed Learning Events Only (completion date will come from learning events)

8. You have the option to have the report emailed to you by click **Email when Complete** or can keep this page open and the report will load when finished.

Run Report for Completed Learning Events Only (completion date will come from learning events)

9. You have the option to have the report emailed to you by click **Email when Complete** or can keep this page open and the report will load when finished.

Please wait...

Report Title: Completed Work (CSV)
Status: Waiting in Queue

Your report is in the queue and will start automatically as long as you do not close this page. (If you close the page, the report will be automatically cancelled.) If you do not wish to wait on this page for your report, you can choose one of the options below.

9. Displayed are Certificates of Completion for every Learning Event in the employee Completed Work

Certificate of Completion

*This certifies that
Lyndell A Walker
Has successfully completed
FY2013 USDA Information Security Awareness Training
Completed on 10/1/2012*

Instructor

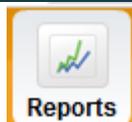


Run a Completed Work (Learning History) Report

Administrators can run a learning history report for one or multiple users. An example of this is: A supervisor would like to see the Learning History of all subordinates to determine developmental needs.

Step	Activity	View
------	----------	------

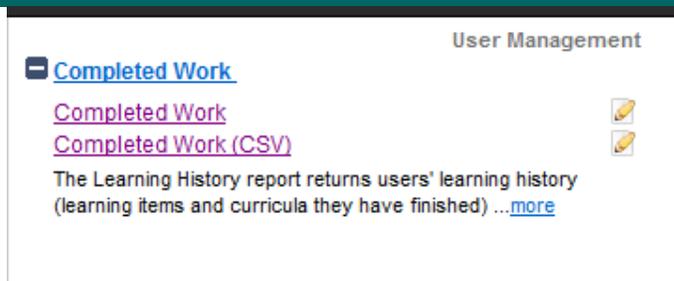
1. Select the **Reports** link



2. Type **Learning History** in the Search and click Submit. Select **Completed Work**.

Choose from the drop down **Learning History (CSV)**. CSV is Microsoft Excel format.

If you want to pull your report in PDF or HTML, choose **Completed Work** link.



3. Report Destination and Format are already pre-populated based on the type of report that was chosen.

Report Destination: Local File ▼

Report Format: CSV ▼

4. Click the blue **Filter icon** to search for a user.

Mask User IDs

Case sensitive search: Yes No

User: Exact ▼ 

Completed Date From: (MM/DD/YYYY)

Completed Date To: (MM/DD/YYYY)

5. Enter the employee first and last name then click **Search**.

Search Users

Case sensitive search: Yes No

User ID: Starts With ▼

Last Name: Starts With ▼ walker

First Name: Starts With ▼ lyn

- 6. Place a checkmark in the **Select** box.

Click **Add to Filter**

Then click **Submit Filter**

Select Users from list

Filter: 1 Users Submit Filter

Walker, Lyndell A(LW038276)

As you select records to include in your filter, they will appear in the Filter List. Select **Submit Filter** when ready to submit the filter and return to your base search criteria

<< Search Again

Add to Filter Reset

User ID	User Name	Job Location	Organization ID	Select
LW038276	Walker, Lyndell A		030103	<input checked="" type="checkbox"/>

Add to Filter Reset

- 7. To run an employee's entire Learning History report, keep the Completed Date From and To empty.

Otherwise, click the **calendar icon** to add search dates.

Click **Run Report**.

Mask User IDs

Case sensitive search: Yes No

User: [1 Selected]

Completed Date From: (MM/DD/YYYY)

Completed Date To: (MM/DD/YYYY)

Run Report

- 8. You have the option to have the report emailed to you by click **Email when Complete** or can keep this page open and the report will load when finished.

Please wait...

Report Title: Completed Work (CSV)
Status: Waiting in Queue

Your report is in the queue and will start automatically as long as you do not close this page. (If you close the page, the report will be automatically cancelled.) If you do not wish to wait on this page for your report, you can choose one of the options below.

Cancel the Report **Email when Complete**

- 9. Click **Open** to view the report.

File Download

Do you want to open or save this file?

Name: report.csv
Type: Microsoft Office Excel Comma Separated Values ...
From: aglearn.usda.gov

Open **Save** **Cancel**

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

- 10. View the report for necessary information

A	B	C	D	E	F	G	H	I	J	K
User	Active Use	First Name	Last Name	Item ID	Item Type	Description	Completion Date	Grade	Completion	Completion
*****Yes		Lyndell	Walker	USDA-CYB	Web Based	USDA Computer Security Awareness Training FY 2008	11/29/2007 10:22 AM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	USDA-PRIV	Web Based	USDA Privacy Basics FY08	12/6/2007 09:06 AM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	USDA-ASC	Web Based	Civil Rights: Readme First	1/23/2008 09:53 AM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	USDA-ASC	Web Based	Civil Rights: Reasonable Accommodation Training 2007	1/23/2008 11:19 AM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	USDA-ASC	Web Based	Civil Rights: Recognizing and Preventing Reprisal 2007	1/23/2008 01:20 PM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	ARS-Effec	Classroom	Effective Communication with Customers	2/28/2008 04:00 PM America/New York		Class Com	Class Com
*****Yes		Lyndell	Walker	ARS-Aglei	Web Based	AgLearn Administrator Training for Training Designees	3/12/2008 03:00 PM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	USDA-ADT	Web Based	2008 AgLearn Administrator Survey	3/19/2008 07:20 AM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	ARS-Aglei	Web Based	AgLearn Administrator Training for Training Designees	4/9/2008 10:41 AM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	ARS-Aglei	Web Based	AgLearn Administrator Training for Training Designees	4/17/2008 03:00 PM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	ARS-Basic	Classroom	The Basics of Swimming	11/19/2008 12:00 PM America/New York		Class Com	Class Com
*****Yes		Lyndell	Walker	USDA-CYB	Web Based	USDA Information Systems Security Awareness FY 2009	12/1/2008 11:25 AM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	USDA-ASC	Web Based	Re-inventing Diversity for Todays USDA (Employees) Fiscal Year 2008	1/30/2009 08:03 AM America/New York		Web Base	Web Base
*****Yes		Lyndell	Walker	DA-ETHIC	Web Based	Ethics: Training Module 21 New Employee Ethics Orientation	2/25/2009 10:23 AM America/New York		Web Base	Web Base

Run an Incomplete Mandatory Training Report

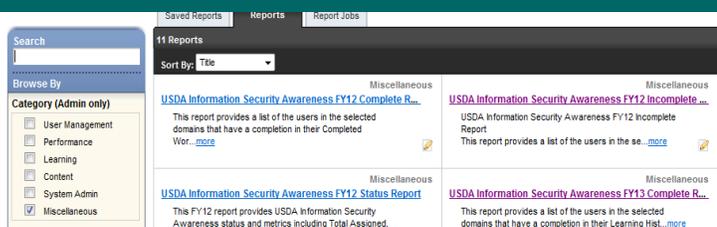
The deadline for mandatory training is approaching. You want to create a report listing all of the users in your agency that have not yet completed their required training.

Step **Activity** **View**

1. Select the **Reports** link



2. In the Search section, only check **“Miscellaneous”**. Locate and select **USDA Information Security Awareness FY13 Complete Report**.



***Note:** All mandatory complete or incomplete reports, are listed in “Miscellaneous”

3. Report Destination and Format are already pre-populated based on the type of report that was chosen

Run USDA Information Security Awareness FY13 Complete Report

Report Destination: Local File
Report Format: CSV

4. Click the blue Filter icon next to Domain add the Domains to the search.

Case sensitive search: Yes No
Domain: Exact ARS

5. Enter the Domain name in the Domain ID field and click **Search**.

Search Domains

Case sensitive search: Yes No

Domain ID: Starts With ARS

Description: Starts With

Domain Type: Starts With

Add/Remove Criteria

Search

6. Type ARS in the **Domain ID** and click **Search**

Domain ID: Starts With ARS

Description: Starts With

Domain Type: Starts With

7. Click the **drop down arrow** in the **Records per Page** section to display all of the available domains.

ID	Description	Levels	Top Level Only	Include Sub Domains
<input type="checkbox"/> ARS	Agricultural Research Service	3	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ARS-AFM	Administrative & Financial Management	4	<input type="checkbox"/>	<input type="checkbox"/>
ARS-AFM-EXTERNAL	ARS-AFM-EXTERNAL	5	<input type="checkbox"/>	
<input type="checkbox"/> ARS-BA	ARS: BA 03-10-12	4	<input type="checkbox"/>	<input type="checkbox"/>
ARS-BA-EXTERNAL		5	<input type="checkbox"/>	

8. Click **Select All** to place a checkmark for all of the Domains.

Click **Add to Filter**.

Click **Submit Filter**.

Filter: 24 Domains Submit Filter

Select Domains from List

As you select records to include in your filter, they will appear in the Filter List. Select **Submit Filter** when ready to submit the filter and return to your base search criteria

[<< Search Again](#)

Add to Filter Reset

ID	Description	Levels	Top Level Only	Include Sub Domains
<input checked="" type="checkbox"/> ARS	Agricultural Research Service	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> ARS-AFM	Administrative & Financial Management	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ARS-AFM-EXTERNAL	ARS-AFM-EXTERNAL	5	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> ARS-BA	ARS: BA 03-10-12	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ARS-BA-EXTERNAL		5	<input checked="" type="checkbox"/>	
ARS-EXTERNAL	Contractors	4	<input checked="" type="checkbox"/>	

9. Click **Run Report**

Report Destination: Local File

Report Format: CSV

Case sensitive search: Yes No

Domain: [24 Selected]

Run Report

10. You have the option to have the report emailed to you by clicking **Email when Complete** or can keep this page open and the report will load when finished.

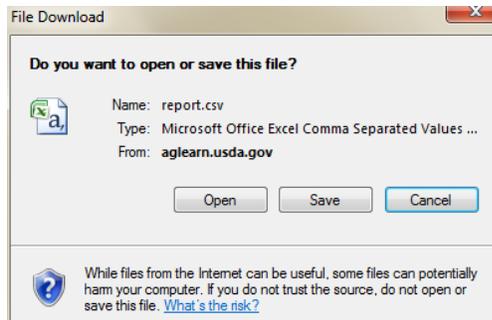
Please wait...

Report Title: USDA Information Security Awareness FY13 Complete Report
Status: Waiting in Queue

Your report is in the queue and will start automatically as long as you do not close this page. (If you close the page, the report will be automatically cancelled.) If you do not wish to wait on this page for your report, you can choose one of the options below.

Cancel the Report Email when Complete

11. Click **Open** to view the report.



11. Click **Open** to view the report.

	User ID	Domain ID	Hire Date	Title	Completion Date
1	NK036565	ARS	9/23/2012 0:00	FY2013 USDA Information Security Awareness T	10/18/2012 10:07
2	SAZ97865	ARS-AFM	7/23/1979 0:00	FY2013 USDA Information Security Awareness T	10/2/2012 12:01
3	LB036965	ARS-AFM	8/25/2002 0:00	FY2013 USDA Information Security Awareness T	10/18/2012 11:48
4	RC037868	ARS-AFM	11/25/1985 0:00	FY2013 USDA Information Security Awareness T	10/17/2012 20:47
5	SH038265	ARS-AFM	8/12/2001 0:00	FY2013 USDA Information Security Awareness T	10/17/2012 16:27
6	JCZ117578	ARS-AFM	9/8/1998 0:00	FY2013 USDA Information Security Awareness T	10/19/2012 15:51
7	SC038369	ARS-AFM	4/13/1986 0:00	FY2013 USDA Information Security Awareness T	10/3/2012 8:46
8	GDZ48369	ARS-AFM	3/12/1980 0:00	FY2013 USDA Information Security Awareness T	10/22/2012 10:58
9	HD038268	ARS-AFM	5/8/1988 0:00	FY2013 USDA Information Security Awareness T	10/12/2012 13:50
10	JDZ128283	ARS-AFM	6/21/2009 0:00	FY2013 USDA Information Security Awareness T	10/18/2012 14:11
11	MD037778	ARS-AFM	4/22/2012 0:00	FY2013 USDA Information Security Awareness T	10/18/2012 8:34
12	PDZ97865	ARS-AFM	5/30/2004 0:00	FY2013 USDA Information Security Awareness T	10/3/2012 7:56
13	RDZ88284	ARS-AFM	9/25/1988 0:00	FY2013 USDA Information Security Awareness T	10/4/2012 6:46
14	sD038346	ARS-AFM	9/27/1976 0:00	FY2013 USDA Information Security Awareness T	10/2/2012 14:17
15	BE227869	ARS-AFM	6/28/1982 0:00	FY2013 USDA Information Security Awareness T	10/3/2012 8:43
16	VE038365	ARS-AFM	12/5/1989 0:00	FY2013 USDA Information Security Awareness T	10/11/2012 11:17
17					

Run an Item Status Report

Most reports only allow you to run data for specified domains; E.g. ARS-HQ, ARS-PWA, etc. Sometimes you would like to only run data for a specific office or unit to see who within that office completed training. The Item Status Report will allow you to do pull this data.

Step	Activity	View
------	----------	------

- | | | |
|----|--------------------------------|---|
| 1. | Select the Reports link |  |
|----|--------------------------------|---|



- | | | |
|----|---|--|
| 2. | Type Item Status in the Search and click Submit. Select Item Status . | |
|----|---|--|

From the drop down, select **Item Status (CSV)**, for excel format.

- | | | |
|----|--|--|
| 3. | Report Destination and Format are already pre-populated based on the type of report that was chosen. | |
|----|--|--|

Run Item Status (CSV)

Report Destination:

Report Format:

- | | | |
|----|---|--|
| 4. | Click the blue filter tab in the User section. | |
|----|---|--|

- | | | |
|----|---|--|
| 5. | To search for an entire group, add the Organizational Unit ID

Then click Search . | |
|----|---|--|

- 6. Click the **drop down arrow** in the **Records per Page** section to display all of the employee's in the Organization.

Select Users from list

As you select records to include in your filter, they will appear in the Filter List. Select **Submit Filter** when ready to submit the filter and return to your base search criteria

<< Search Again

Add to Filter Reset

Records per Page	Page: 1 2 3 4 5	«Previous	Next»	(71 total records)	Page 1 of 8	Go
User ID	User Name	Job Location	Organization ID	Select	Select All / Deselect All	
LA037875	Allen, Lakendrick D		030103	<input type="checkbox"/>		
JBZ208272	Barber, Judith A		030103	<input type="checkbox"/>		
DC038072	Batie, Deborah A		030103	<input type="checkbox"/>		

- 7. Click **Select All** to place a checkmark for all of the employee's.
- Click **Add to Filter**.
- Click **Submit Filter**.

Filter: 71 Users Submit Filter

Select Users from list

As you select records to include in your filter, they will appear in the Filter List. Select **Submit Filter** when ready to submit the filter and return to your base search criteria

<< Search Again

Add to Filter Reset

Records per Page	(71 total records)				Select All / Deselect All
User ID	User Name	Job Location	Organization ID	Select	
LA037875	Allen, Lakendrick D		030103	<input checked="" type="checkbox"/>	
JBZ208272	Barber, Judith A		030103	<input checked="" type="checkbox"/>	
DC038072	Batie, Deborah A		030103	<input checked="" type="checkbox"/>	
MB036878	Boyd, Michelyn P		030103	<input checked="" type="checkbox"/>	
CBZ247869	Brown, Charlene S		030103	<input checked="" type="checkbox"/>	
MBZ497869	Brown, Michelle L		030103	<input checked="" type="checkbox"/>	

- 8. Click the blue filter icon in the Item section to add the Item to the report.

Mask User IDs

Case sensitive search: Yes No

User: [71 Selected]  

Item: Exact Type: 

ID:

- 9. Add the Item ID and then click **Search**.

Search

Case sensitive search: Yes No

Item Types: Starts With 

Item ID: Starts With USDA-NoFear

Revision Date: 

10. Place a checkmark for the selected trainings and click **Add to Filter**.

Item ID	Title	Select
Classroom USDA-NOFEARACT-FY2013-COMP-ILT (Rev 1 - 10/12/2012 10:16 AM America/New York)	USDA No FEAR Act Training - FY2013 (Instructor Led)	<input type="checkbox"/>
Course USDA-NOFEARACT-2010-PAPER (Rev 1 - 1/21/2011 11:30 AM America/New York)	USDA No FEAR Act Training 2010	<input type="checkbox"/>
Course USDA-NOFEARACT-2013-COMP-PAPER (Rev 1 - 10/12/2012 10:13 AM America/New York)	USDA No FEAR Act Training - FY2013 (Paper Based)	<input type="checkbox"/>
Course USDA-NOFEARACT-2013-PAPER (Rev 1 - 10/11/2012 01:01 PM America/New York)	USDA No FEAR Act Training 2013 (Paper-based)	<input type="checkbox"/>
Web Based USDA-NOFEARACT-FY2013-COMP (Rev 1 - 10/9/2012 11:55 AM America/New York)	USDA No FEAR Act Training - FY2013	<input type="checkbox"/>
Web Based USDA-NoFearAct-2011-Paper (Rev 1 - 7/25/2011 06:54 PM America/New York)	USDA No Fear Act Refresher paper version	<input checked="" type="checkbox"/>
Web Based USDA-NoFearAct-2011-Refresher (Rev 1 - 7/19/2011 10:02 AM America/New York)	No FEAR 2011 Refresher Training	<input checked="" type="checkbox"/>

Records per Page 10 (7 total records) Select All / Deselect All

Add to Filter Reset

11. Click **Submit Filter**

▶ Filter: 2 Items Submit Filter

12. *Completion Status is an optional field and is not required.

Click **Run Report**.

Mask User IDs

Case sensitive search: Yes No

User: [71 Selected]

Item: [2 Selected]

Completion Status: Exact

Completed Date From:

Completed Date To:

Run Report Schedule Job

13. You have the option to have the report emailed to you by click **Email when Complete** or can keep this page open and the report will load when finished.

Please wait...

Report Title: Item Status (CSV)

Status: Waiting in Queue

Your report is in the queue and will start automatically as long as you do not close this page. (If you close the page, the report will be automatically cancelled.) If you do not wish to wait on this page for your report, you can choose one of the options below.

Cancel the Report Email when Complete

14. **(Optional)** Click the icon next to **Completion Status**

Completion Status: Exact

15. View the report for any necessary information

1	Item ID	Last Name	First Name	Completion Status ID	Completion Status	Completion Date
2	USDA-NoFearAct-2011-Paper	May	Kristie	Web Based Complete	Web Based Complete	10/31/2011 02:46 PM America/New York
3	USDA-NoFearAct-2011-Refresher	Cardenas	Edward	Web Based Complete	Web Based Complete	8/1/2011 12:58 PM America/New York
4	USDA-NoFearAct-2011-Refresher	Walker	Lyndell	Web Based Complete	Web Based Complete	8/2/2011 06:40 AM America/New York
5	USDA-NoFearAct-2011-Refresher	McGregor	Kimberley	Web Based Complete	Web Based Complete	8/3/2011 09:35 AM America/New York
6	USDA-NoFearAct-2011-Refresher	Clark	Hillary	Web Based Complete	Web Based Complete	8/5/2011 09:26 AM America/New York
7	USDA-NoFearAct-2011-Refresher	McFadden	Ashley	Web Based Complete	Web Based Complete	8/8/2011 10:42 AM America/New York
8	USDA-NoFearAct-2011-Refresher	Franklin	Margaret	Web Based Complete	Web Based Complete	8/17/2011 09:16 AM America/New York
9	USDA-NoFearAct-2011-Refresher	Humphrey	Patricia	Web Based Complete	Web Based Complete	8/17/2011 09:59 AM America/New York
10	USDA-NoFearAct-2011-Refresher	Parker	Elizabeth	Web Based Complete	Web Based Complete	8/17/2011 03:17 PM America/New York
11	USDA-NoFearAct-2011-Refresher	Lutrey	Katrina	Web Based Complete	Web Based Complete	8/18/2011 07:13 AM America/New York
12	USDA-NoFearAct-2011-Refresher	Collins	Suzanne	Web Based Complete	Web Based Complete	8/18/2011 09:23 AM America/New York
13	USDA-NoFearAct-2011-Refresher	Newcomb	Angela	Web Based Complete	Web Based Complete	8/22/2011 02:15 PM America/New York
14	USDA-NoFearAct-2011-Refresher	Gomez	Mari	Web Based Complete	Web Based Complete	8/22/2011 04:21 PM America/New York
15	USDA-NoFearAct-2011-Refresher	Tapscott	Dorothy	Web Based Complete	Web Based Complete	8/24/2011 01:40 PM America/New York
16	USDA-NoFearAct-2011-Refresher	Ingles	Caroline	Web Based Complete	Web Based Complete	8/29/2011 12:02 PM America/New York
17	USDA-NoFearAct-2011-Refresher	Messer	Brenda	Web Based Complete	Web Based Complete	8/31/2011 02:41 PM America/New York
18	USDA-NoFearAct-2011-Refresher	Gramlich	Virginia	Web Based Complete	Web Based Complete	9/1/2011 01:07 PM America/New York
19	USDA-NoFearAct-2011-Refresher	Brown	Michelle	Web Based Complete	Web Based Complete	9/2/2011 09:55 AM America/New York

Scheduling a Background Job

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 **Users, Learning** and **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 **Users** 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**.

Backgrounds jobs can also be scheduled for revising Items, through the **Learning**. 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.

Schedule a Background Job

Step	Activity	View
1.	After selecting the report and entering the report criteria, select Schedule Job .	<div style="display: flex; gap: 10px;"> <div style="border: 1px solid #ccc; padding: 5px 15px; background-color: #f0f0f0;">Run Report</div> <div style="border: 1px solid #ccc; padding: 5px 15px; background-color: #f0f0f0;">Schedule Job</div> </div>

Note: Background Jobs must be scheduled to run between Midnight and 5 AM during the week or any time on a Saturday or Sunday.

2. Select the **Schedule this job to be executed on** option button.

Note*: Select **Schedule this job to recur as follows** if it's a report that needs to run monthly such as a Mandatory training report.

Run this job immediately, if allowable.
 Schedule this job to be executed on: [View Available Time Slots](#)
 Date: (MM/DD/YYYY)
 Time: (hh:mm AM/PM)
 Time Zone: Eastern Standard Time (America/New York)

Schedule this job to recur as follows:
 Daily
 Weekly Day:
 Monthly Date:
 Time of Day: (hh:mm AM/PM)
 Time Zone: Eastern Standard Time (America/New York)

Job Description:

Notify via email upon completion
 Email:
 Email the Report

3. Select the **View Available Time Slots** link to see times when the job can be performed

[View Available Time Slots](#)

4. Review the available timeframes from the list displayed in the **Allowable Dates/Times For Background Jobs** window.

i.e: Time Frame 0
Monday between 0 to 5
(12am to 5am)

i.e.: Time Frame 5 & 6
(No time restrictions)

Allowable Dates/Times For Background Jobs

Timeframe 0	<ul style="list-style-type: none"> Hour(s) between 0 and 5 Monday
Timeframe 1	<ul style="list-style-type: none"> Hour(s) between 0 and 5 Tuesday
Timeframe 2	<ul style="list-style-type: none"> Hour(s) between 0 and 5 Wednesday
Timeframe 3	<ul style="list-style-type: none"> Hour(s) between 0 and 5 Thursday
Timeframe 4	<ul style="list-style-type: none"> Hour(s) between 0 and 5 Friday
Timeframe 5	<ul style="list-style-type: none"> Saturday
Timeframe 6	<ul style="list-style-type: none"> Sunday
Timeframe 7	<ul style="list-style-type: none"> Date is 25 Month is 12

5. Click **Close**.

Close

6. Click the Date Calendar icon to select and enter the date, using the calendar icon, the background job to run.

Date: (MM/DD/YYYY) 

7. Enter a **Time** for the background job to run.

Time:
(hh:mm AM/PM)

8. Click the **Time Zone** selection icon to search for and enter a Time Zone

Time Zone:

9. Enter a brief description of the job in the Job Description field, if wanted.

Job Description:

By default, the type of report that is chosen its title will appear in the Job Description field

- 10.. Select the Notify via email upon completion check box to send a notification e-mail

Notify via email upon completion

11. Enter the email address for notification in the Email field.

Email:

12. Select the Email the Report check box to receive a copy of a report with the notification e-mail.

Email the Report

Note: The Email the Report check box appears only for Reports.

13. Click **Finish**

14. Verify that the background job has been scheduled on the Status screen.

Background Report Job Scheduled

Background Report Job Status

Job Title: Report
Description: Item Completion Report CSV
Scheduled Start Date: 10/17/2012 03:00 AM America/New York
Status: Scheduled

Then click **Finished**.

Note: Only a System Administrator may reschedule and/or delete background jobs.

You can edit the schedule details and status of this background report job in the [Background Jobs](#) module until it has completed successfully, after which it will appear in your [Report Jobs](#) list.

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 User 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 learning plans.

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.

Adopt an Initiative: Part of the Performance module, describing the copying of an initiative to a subordinate organizational structure. See also *Align an Initiative*.

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 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.*

Completion Status: Indicates the current status of an Item (or Scheduled Offering), relative to a User. The completion status appears with each Item in the Learning History (if complete) or the Learning Plan (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 Learning Plan 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 Learning Plan, 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 User 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 Learning History. Learning Events can be either internal (based on an AgLearn Item) or external.

Learning History: A detailed listing of a User's recorded Learning Events.

Learning Needs: Learning Items assigned to a User's Learning Plan.

Learning Plan: A list of Items a User must complete, with target completion dates for each.

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 Instance: The launching of an online Item for the first time. If the Item is not completed in one session, subsequent sessions will not create a new instance. Once an Item is completed and entered in Learning History, a subsequent launch will create a new online instance, which may also eventually become part of Learning History upon completion.

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 all Items related to the 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 days 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 days 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.

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*.