aglearn+

adding to your knowledge

AgLearn Administrator Toolkit
Version 1411

USDA

Revised March 2, 2016

This is a work in progress.

Changes to the toolkit to reflect differences between AgLearn 6.4 and AgLearn 1411 will take time. Updates will appear weekly to keep as much of the most current information available as is practical.

For quick and easy reference, please refer to the date on the title page (or Table of Contents), as well as the table below, to see if the section you need has been updated. Please note, the differences between 6.4 and 1411 and not dramatic. Even if what you‘re looking for is still the 6.4 version, it will likely be helpful.

Team AgLearn thanks you for your patience and cooperation.

SECTION	DATE ADDED
The Administrator Environment	19 February 2016
Managing Data Entry and Searches	19 February 2016
Managing Users	19 February 2016
Direct Linking	19 February 2016
External Training Requests (SF-182)	19 February 2016
Managing Items	19 February 2016
The Item Revision Wizard	19 February 2016
Managing Scheduled Offerings	19 February 2016
Managing Segments	26 February 2016
Managing Requests	26 February 2016
Managing Slots	26 February 2016
Managing Scheduled Offering Registrations	26 February 2016
Reports	26 February 2016
Scheduling Background Jobs	26 February 2016
User Needs Management	26 February 2016
Managing Learning Events	26 February 2016
Managing Instructors	2 March 2016
Managing Location Records	2 March 2016

Managing Facility Records	2 March 2016
Managing Training Approval Processes	2 March 2016
Managing Curricula Records	2 March 2016
Managing Curriculum Assignments	2 March 2016

Table of Contents

The Administrator Environment (1411)

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

Logging Into AgLearn (1411)

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

The login procedure is identical whether you're entering Production or Staging.

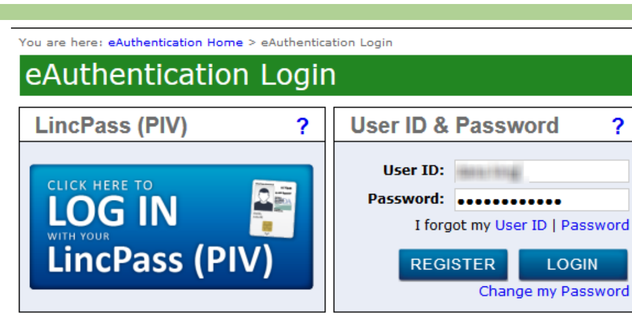
1. Access the AgLearn splash page at http://www.aglearn.usda.gov/

Click **Login**.

Login issues should be directed to the AgLearn Help Desk

2. Enter your eAuthentication ID and password.

Click **Login**.



:

Administrator's Home Page (1411)

Note: Your view of the Administrator Home Page will depend on the specific roles assigned to you.

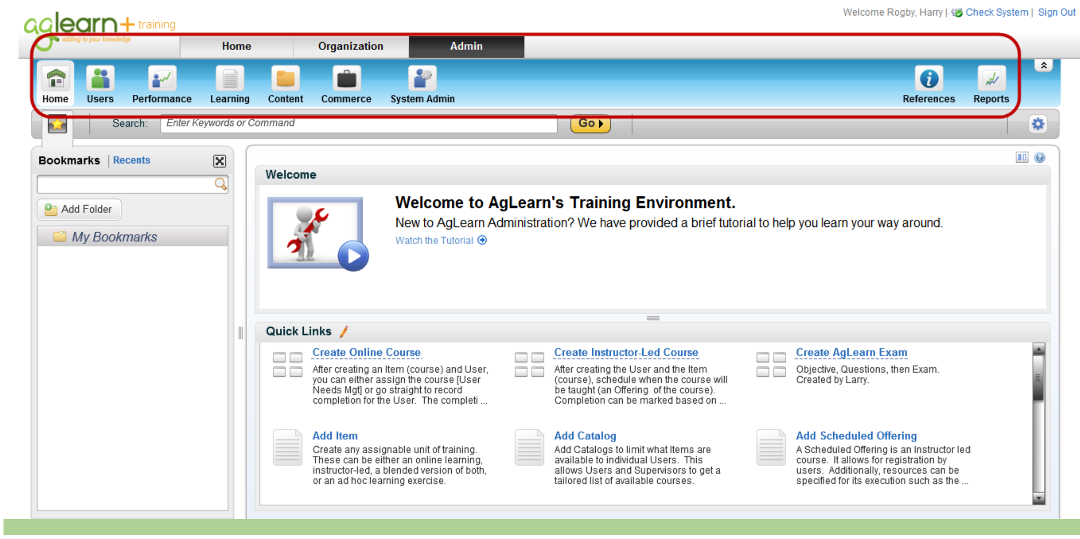
The **Administrator's Home Page** is the page you will see when entering the administrator environment. The buttons of the Top Menu take you to various functional areas in AgLearn.

Home
Users
Performance
Learning
Content
Commerce
System Admin
References
Reports

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

:

Administrator's Home Page (1411)



The administrator home page and many other pages are configurable by the administrator to suit personal preference and work habits. Do not be concerned if your screens do not match exactly with yours.

Screen Types (1411)

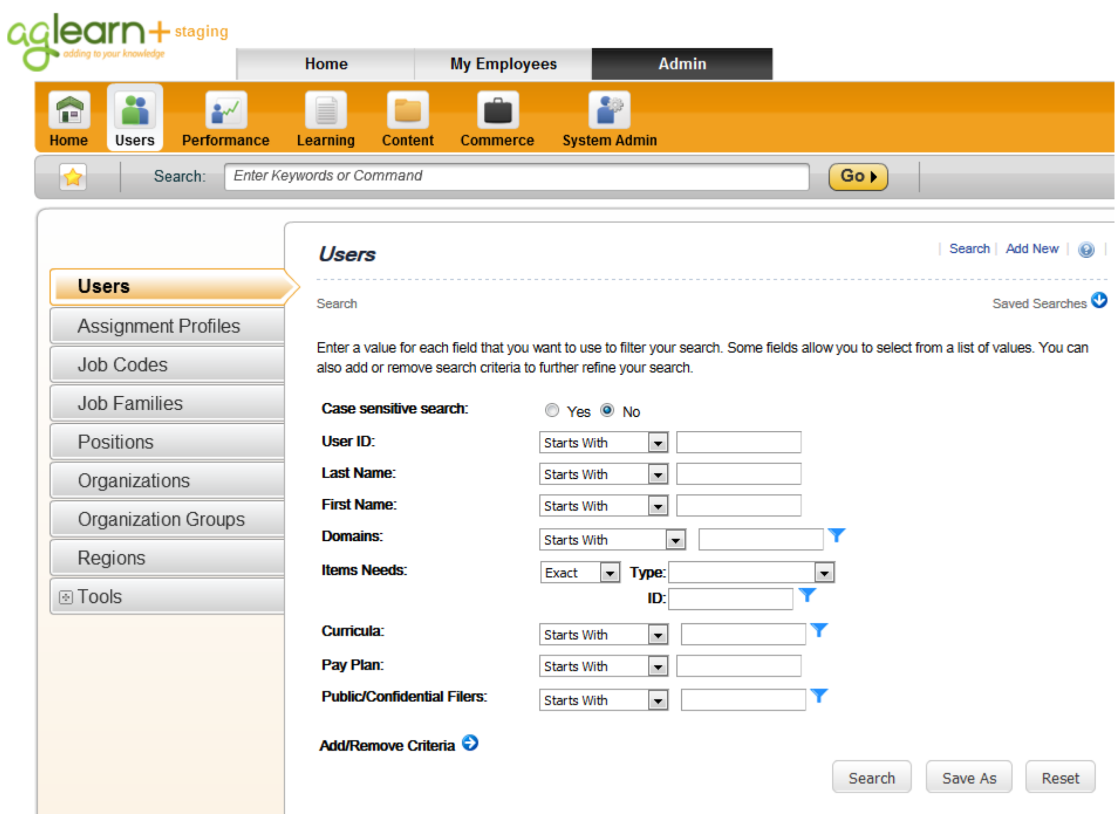
Several types of screens may appear in the administrative interface. Below is a partial list of common screens types appearing throughout AgLearn:

- Search
- Results Tab
- Screens with Sections
- Reports
- Assistants

Screen Types/Search (1411)

The **Search** screen is typically the default screen that appears when selecting an option from the **Button Bar**. This screen provides the ability to define criteria for narrowing a search.

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

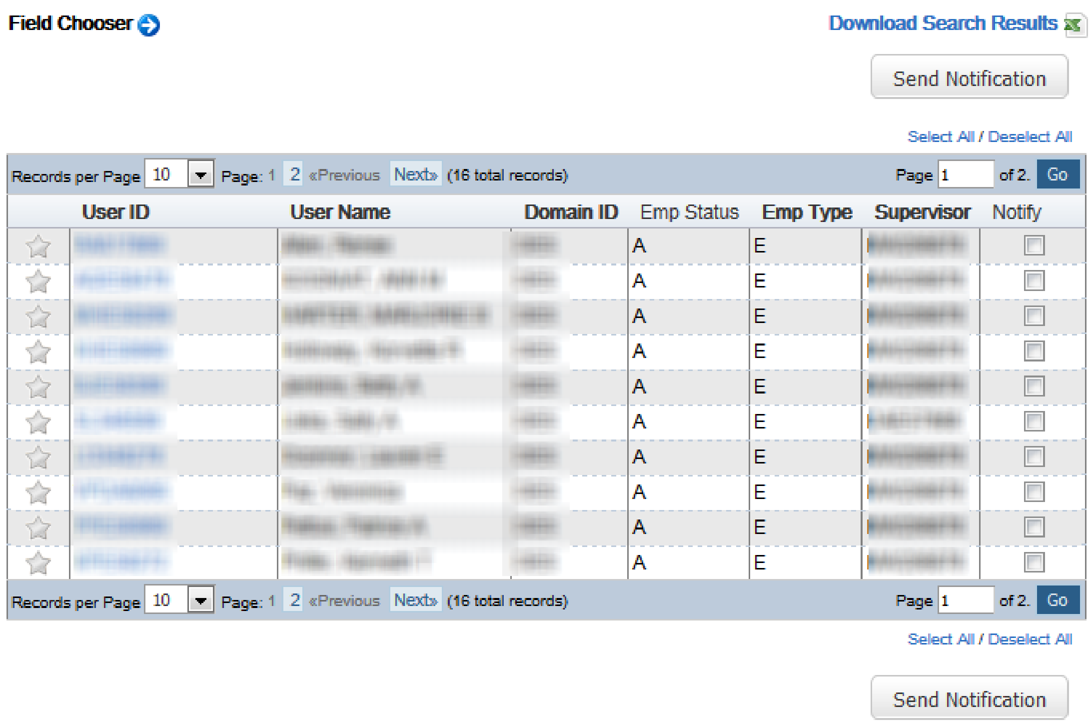


:

Screen Types/Results (1411)

The entry of criteria on a **Search** screen and clicking the **Search** button produces a **Results** display at the bottom of the **Search** screen. Selecting the entity's ID (User ID, Item ID, etc.) or appropriate icon next to a result allows the administrator to view or edit that result based upon the permissions/role of the person logged into AgLearn.

Note: Some search results have links to take you directly to the record; some have icons to allow you to view or edit.

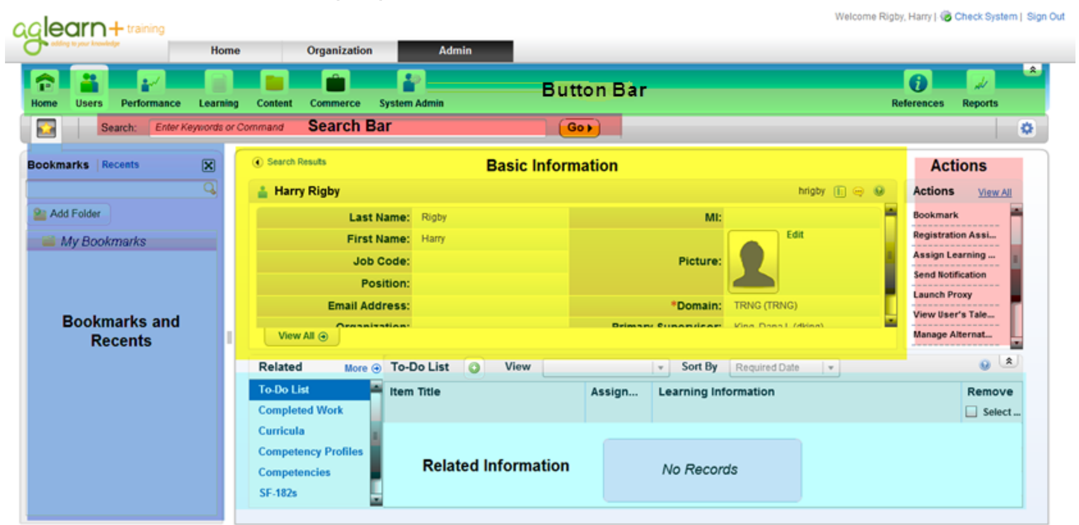


:

Screen Types/Sections (1411)

Screens that contain a great deal of data are broken into sections to present the information in a categorized fashion rather than displaying all of the information on one very long screen. When editing information in a section, **Save** and a **Cancel** buttons appear, giving you the opportunity to either save any changes before leaving the section, or to cancel them.

A typical AgLearn screen divides into six sections. Here is Harry Rigby's user record, shown for demonstration purposes.



Interface Tabs (top of diagram below) – Admins can switch between their user and administrator interfaces by clicking either the **Home** tab or the **Admin** tab. All admins have a **Home** tab (for their personal training record) and an **Admin** tab to display the administrative interface. Those who have subordinates and/or other organizational responsibilities will also see a **My Employees** tab and/or an **Organization** tab. Harry Rigby has no subordinates, so he sees no **My Employees** tab.

Button Bar (Green in diagram below, near top) – Shows some combination of the functions available to the administrator. Since Harry is an administrator with many assigned roles, he has access to all the available buttons on the button bar. See ***Menu Button Descriptions*** to learn more about button functions.

Search Bar (Red in diagram, near top) – Enter keywords into this field to search across all AgLearn entities. For example, entering "Information Security Awareness" will return every item, scheduled offering, exam, survey, content object, etc. where "Information Security Awareness" appears in either the ID, title, or description. The Search bar can also access functions. For example, typing "add item" will allow you to go directly to Item Creation Wizard.

Bookmarks and Recents (Blue in diagram, left) – You can bookmark frequently used pages for easier reference, much the same as in your internet browser. The Recent list keeps track of the last 50 records visited so you can return to them instead of having to conduct another search. You may hide or display this area at will.

Basic Information (Yellow in diagram, center) – Core information about the record being viewed. For user records, this includes information such as First Name, Last Name, Domain, Email Address, Supervisor, etc. Clicking **View All** expands the frame to show additional basic information.

Actions (Salmon in diagram, right) – Things you can do with a record. For user records, this includes bookmarking the record, assigning learning, and sending notifications, among other things.

:

Screen Types/Sections (1411)

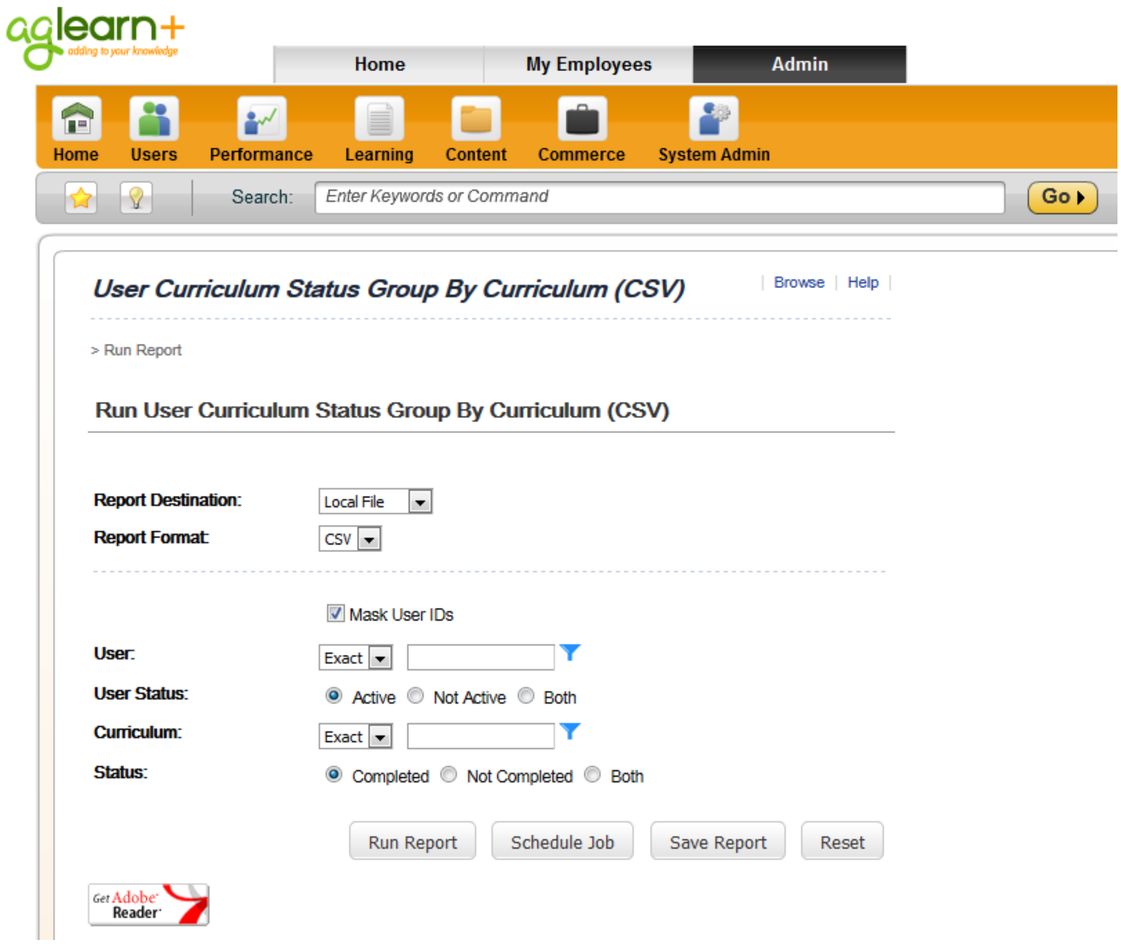
Related Information (Light blue, bottom) **–** More detailed and specific information than can be found in the Basic information frame. For users, this includes things such as the To-Do List, Completed Work, Curricula, and SF-182s. More fields are available by clicking the **More** icon.

:

Screen Types/Reports (6.4)

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

Note: More detailed information on searching for and running reports is in the **Reports** section of this document.



:

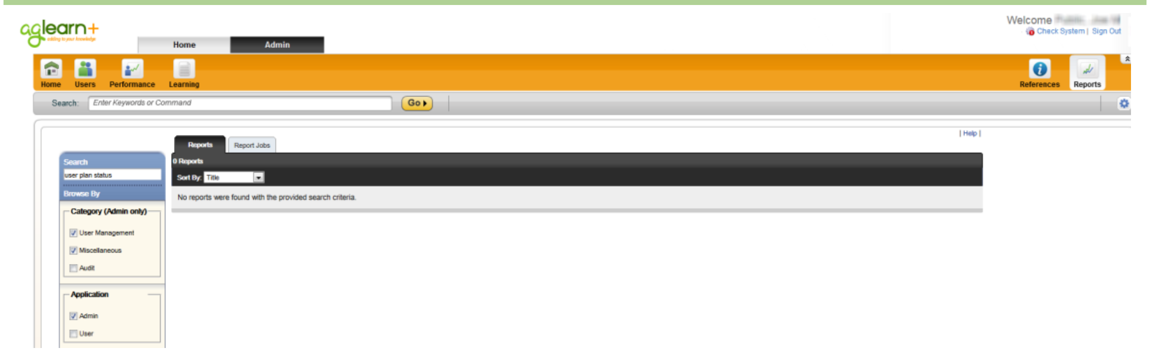
Screen Types/Assistants (1411)

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

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

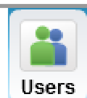
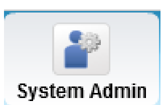
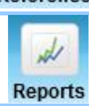
:

Screen Types/Assistants (1411)



Menu Button Descriptions (1411)

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

Menu Option	Example	Description
Home		The **Home** menu option is a Welcome Page, with links to the most commonly performed tasks for your assigned role and a link to the Help System. The home page is configurable to allow administrators to display the links and functions most useful to them.
Users		The **Users** menu option provides access to those system functions used to manage general User information, User competency assessments, and User learning events.
Performance		The **Performance** menu option allows the administrator to manage competencies, performance evaluations, and succession planning.
Learning		The **Learning** menu option provides access to those system functions used to manage learning items (including online items), Scheduled Offerings, Catalogs, Curricula, Questionnaire Surveys, and Instructors.
Content		The **Content** menu option provides access to those system functions used to manage online content, such as content objects (courseware), questions, and exam objects.
Commerce		The **Commerce** menu option provides access to those system functions used to track and update commercial transactions of Users and/or organizations defined in AgLearn.
System Admin		The **System Admin** menu option provides access to those system functions used to manage AgLearn application variables and settings, security and data domain privileges, custom columns, default notification messages, custom reports, and administrator information.
References		The **References** menu option provides access to data most often used to support the primary data types, such as facilities, and locations. Approval processes, item types, and other system elements also appear here.
Reports		The **Reports** menu option provides access to those system functions used to generate any available AgLearn report.

Menu Options (1411)

The table below lists the seven menu options, with their corresponding sub-menu options, available to the AgLearn administrator. (The Home menu is excluded as it is infinitely configurable.)

Users	Performance	Learning	Content	Commerce	System Admin	Reports
Users	Competencies	Items	Content Objects	Account Codes	+ Application Admin	User Management
Assignment Profiles	Competency Profiles	Scheduled Offerings	Content Packages	Order Management	+ Security	Performance
Job Codes	Assessment Surveys	Classes	Questions	Unused Order Tickets	+ Automatic Processes	Learning
Job Families	Assessment Process	Group Instances	Exam Objects	Financial Transaction Approval	+ Connectors	Content
Positions	Skill Search	Catalogs	Objectives	Coupons	+Configuration	System Admin
Organizations	Plans	Programs	Documents	Subscriptions	+ Custom Columns	Miscellaneous (These are Custom Reports)
Organization Groups	Goals	Curricula	Deployment Locations	Purchase Orders	+ Tools	Audit
Regions	+Tools	Requirements	+ Tools	+ Tools	Background Jobs	Commerce
+ Tools		Questionnaire Surveys			Environment	
		Communitie s				
		Content Network				
		Instructors				
		+ Tools				

Universal Controls (1411)

The table below lists common examples of the universal controls (with their corresponding descriptions) that are available throughout AgLearn.

Menu Option	Example	Description
Apply Changes	Apply Changes	The **Apply Changes** button saves changes made to information appearing in the corresponding section of a screen. **Important**: Not all pages have Apply Changes buttons; some have the option to Save or Cancel. If a page displays an **Apply Changes** button, changes made to that page are lost if **Apply Changes** is not clicked before leaving the page.
Save	Save	The **Save** button saves any changes you make to a screen. It does not appear unless something has changed since the last save.
Cancel	Cancel	The **Cancel** button cancels any changes made to a screen. Like the **Save** button, it will not appear unless changes have been made to the screen.
Reset	Reset	The **Reset** button resets all fields on the corresponding screen to their original values.
Add	Add	The **Add** button appears a prompt to add search results to the list you are compiling.
View		The **View** button appears on a **Results** screen and displays the corresponding record for viewing purposes only.
Edit		The **Edit** button appears on a **Results** screen and opens the corresponding record in Edit mode.
Records per Page	Records per Page 10	The **Records per Page** field indicates the number of records to be shown on each screen
Search	Search	The **Search** button performs a search based on the criteria selected on the **Search** screen.
Expand Tree		The **Expand Tree Icon** indicates the data displayed is the parent of several other nested components. Click the icon to display the entire hierarchy.
Collapse Tree		The **Collapse Tree Icon** folds all child components under the parent.
Filter		The **Filter** icon opens a separate window to define search parameters.
Expand		The **Expand** icon will open a pop-up window with additional options for the parameter with which it is associated.
More Options		The **More Options** icon will open a pop-up window with additional options for the parameter with which it is associated.
Search		The **Search** icon opens a new **Search** screen.
Add one or more from list	add one or more from list	The **Add one or more from list** link displays a search screen.
Calendar		The **Calendar** icon opens a separate window to select and enter a date in its corresponding field.
Next	Next	The **Next** button displays the next screen in a sequence when using an assistant.
Previous	Previous	The **Previous** button displays the previous screen in a sequence when using an assistant.
Submit	Submit	The **Submit** button submits the information entered on previous screens and completes the process when using an assistant.

Menu Option	Example	Description
Add New	Add New	The **Add New** link provides the ability to add a new record (e.g., to add a new item, click **Add New** on the Items search screen).
Help		The **Help** icon is located in the upper right corner of the frame in which you are working and launches Help screens in a new window.
Check System	 Check System	**Check System** performs a verification of the software AgLearn needs in order to perform properly on your computer, such as the browser, Flash, and Adobe Reader. A green check shows these things meet or exceed minimum standards. A red minus sign shows something is missing, or is an outdated version that may require an update if AgLearn is to perform properly.
Sign Out	Sign Out	The **Sign Out** link, which is located in the upper right corner of all screens, ends the current AgLearn session.

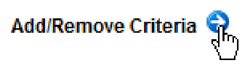
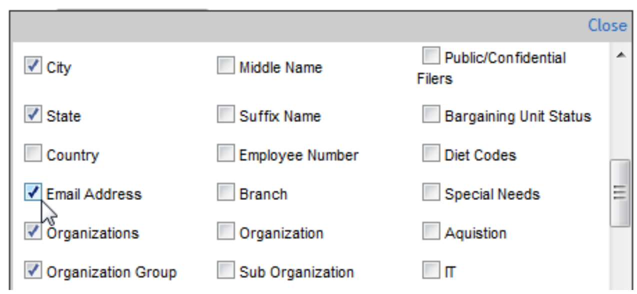
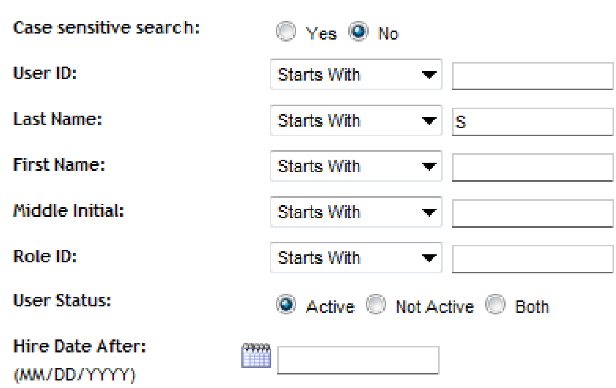
Managing Data Entry and Searches (1411)

A number of search screens in AgLearn make it easy to find data by applying a search filter. Search filters enable you to define search criteria and provide more efficient and effective searches. Most administrators will find a regular set of search criteria that meets their most common needs, and will make only occasional changes for special circumstances.

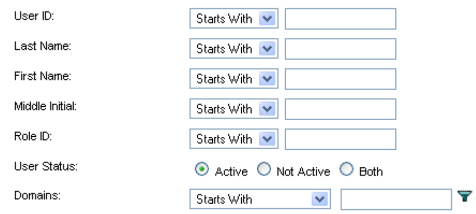
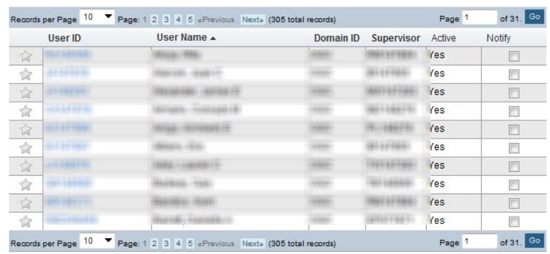
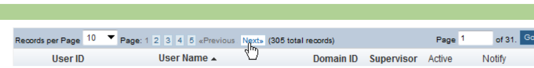
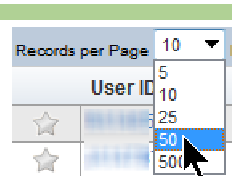
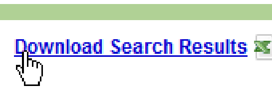
Search-specific tasks include the following: **Personalize a Search**, **Perform a Search**, **Personalize Search Results**, **Save a Search**, **Execute a Saved Search**, **Perform a Select or Add From List Search**, **Select and Enter a Date via the Calendar Icon** and **Perform a Selection via the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

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

Adding/Removing Search Criteria (1411)

Step	Activity	View
1.	Select the **Users** button.	
2.	Click the **Expand** icon next to **Add/Remove Criteria**	
3.	Check (or uncheck) the boxes for the criteria you want to use.	
4.	Click **Select.**	
5.	The criteria you selected will appear for subsequent searches.	

Performing a Search (6.4)

Step	Activity	View
1.	Select the **Users** button.	
2.	Enter and/or select the basic search criteria as appropriate. **Note**: You may leave data fields blank to prevent them having an effect on the search.	
3.	Click **Search**.	
4.	Review search results.	
5.	If necessary, select the **Next Page** link to go to the next page of results.	
6.	Select the **Records per Page** drop-down list to display more or fewer results on each screen	
7.	To download the search results into an Excel spreadsheet, click the **Download Search Results** link	

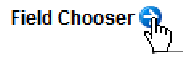
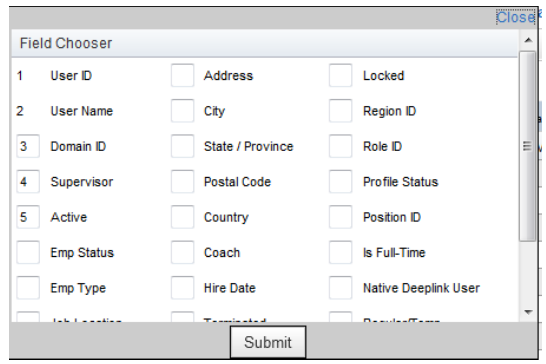
To go to a specific page number, enter the desired number in the Page field and click **Go**.

Be careful when selecting **All**, as it may take some time for the screen to display results.

Customizing Search Results (1411)

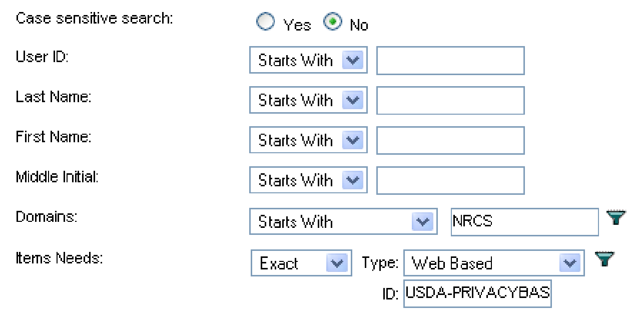
Once search results display, you can add additional visible fields on the Search Results screen.

The search screen is available on many menus. We're using the User Management menu for illustration purposes.

Step	Activity	View
1.	Select the **Users** button.	
2.	Click the **Expand** icon next to **Field Chooser**.	
3.	Add numbers to the checkboxes to identify the criteria and the order of the fields you would like to see displayed for your subsequent search results.	
4.	Click **Submit** to see the search results with the additional fields.	

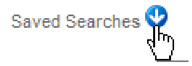
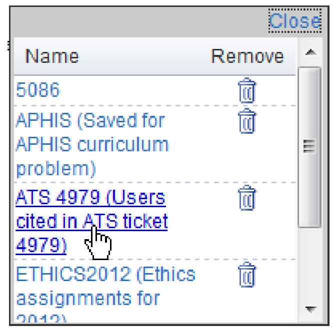
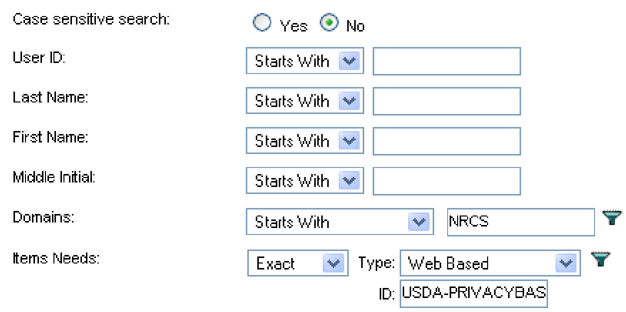
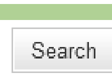
The search screen is available on many menus. We're using the User Management menu for illustration purposes.

Saving a Search (1411)

Step	Activity	View
1.	Select the Users button.	
2.	Fill in your search parameters.	
3.	Click **Save As**.	
4.	Enter a **Saved Search ID** and description.	
5.	Click **Submit**.	

The search screen is available on many menus. We're using the User Management menu for illustration purposes.

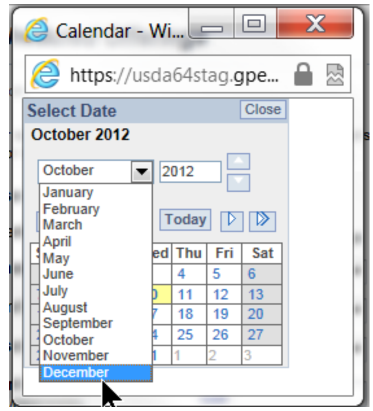
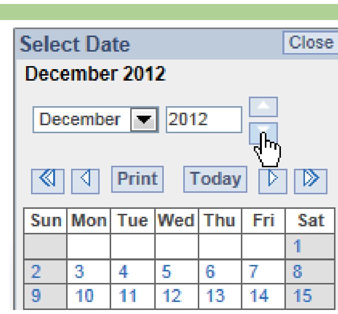
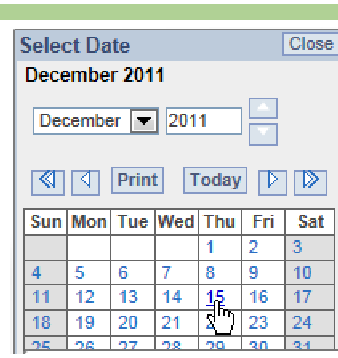
Executing a Saved Search (1411)

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

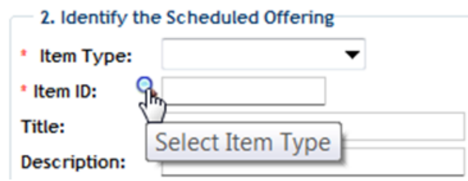
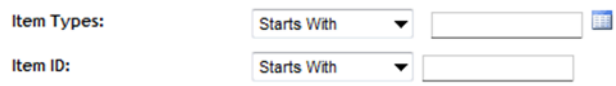
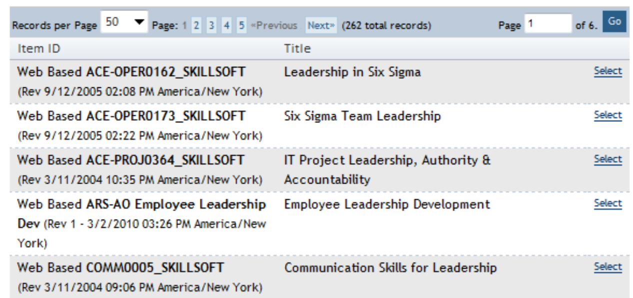
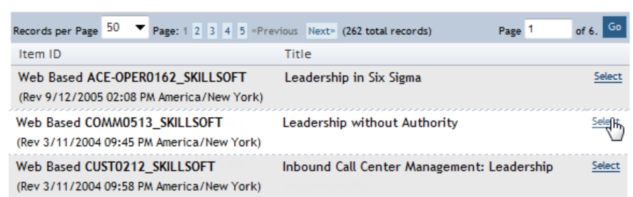
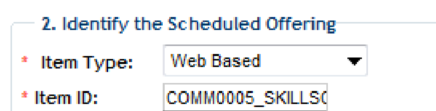
Using the **Calendar** icon prevents date formatting errors.

You can also click on the **>** and **>>** (or < and <<) symbols to change the month and year.

Selecting and Entering a Date via the Calendar Icon (1411)

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Click the Calendar icon next to the desired field.</td><td>
</td></tr>
<tr><td>2.</td><td>Select the month from the drop-down list.</td><td>
</td></tr>
<tr><td>3.</td><td>Click the increase or decrease buttons to change the year's display forward or backward.</td><td>
</td></tr>
<tr><td>4.</td><td>Select the desired date to enter the date and close the Select Date window.
Tip: Select the Today button to set the date to the current day.</td><td>
</td></tr>
<tr><td>5.</td><td>Verify the selected date appears in the Date field.</td><td>
</td></tr>
</table>

Performing a Selection When Only One Option May Be Chosen (1411)

	Step	Activity	View
The search screen is available on many menus. We're using the Item Management menu for illustration purposes.	**1.**	Click the Item ID search icon to open an Item search window.	
Leave any search fields blank to select from the entire list.	**2.**	Enter or select the search criteria as appropriate.	
	3.	Click **Search**.	
Click **Next** to move to additional pages of results or select **All** from the Results per Page drop down list to display all the results on the screen.	**4.**	Review search results.	
Clicking **Select** closes the results window closes; the data is automatically appears in the field.	**5.**	Select the **Select** link of the record you're looking for.	
	6.	Verify the selected data appears in the field.	

Managing Users (1411)

Automated data feeds have virtually removed the need for administrators to edit user's records. All user information except for their supervisor automatically updates three times daily, and the users themselves have the primary responsibility for keeping their supervisor field up to date. Still, there are a few hands-on duties for administrators.

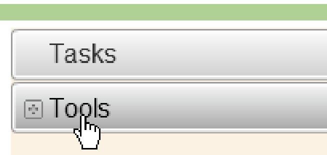
The **Merge Users** functionality is useful when multiple accounts exist for the same user. The **Supervisor Assistant** allows the administrator to quickly update AgLearn when a supervisor change occurs, instead of waiting for all of the affected users to do it individually.

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

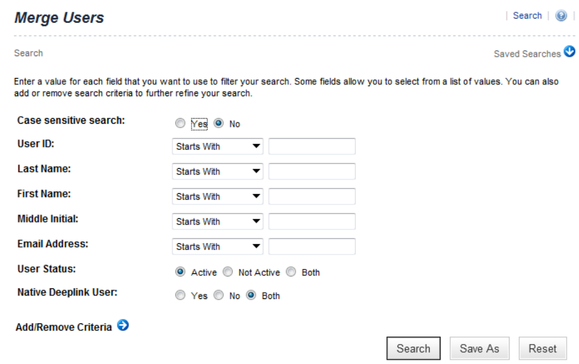
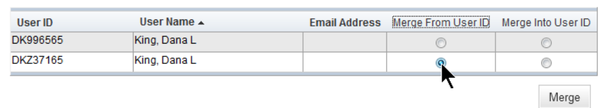
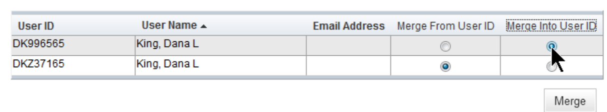
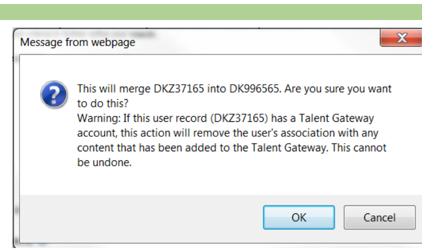
Ad Hoc Notifications allow the administrator to directly communicate via e-mail with a subset of users that assembled for that specific communication. (All those who have not completed a specific Item, for instance.) Administrators with the necessary can create, modify, approve, and verify SF-182 forms used as requests for external training.

Assignment Profiles are powerful compilations of attributes that used for catalog access, Item or curriculum assignment, or any function that involves potentially large numbers of Users with AgLearn attributes in common.

Merging Users (1411)

Step	Activity	View
1.	Select the **Users** button.	
2.	Expand the **Tools** menu.	
3.	Select **Merge Users**.	

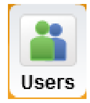
Merging Users (1411)

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>4.</td><td>Use the search page to filter the list of users. Be sure that your search criteria will result in both User records appearing.
Click Search.</td><td>
</td></tr>
<tr><td>5.</td><td>Find the user whose records you wish to use as the secondary user. Click the corresponding Merge from User ID radio button.</td><td>
</td></tr>
<tr><td>6.</td><td>Find the primary user into whom you want to merge the records. Click the corresponding Merge Into User ID radio button.</td><td>
</td></tr>
<tr><td>7.</td><td>Click Merge.</td><td>
</td></tr>
<tr><td>8.</td><td>Click OK.</td><td>
</td></tr>
</table>

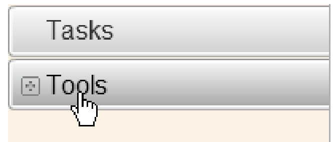
Supervisor Assistant (1411)

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

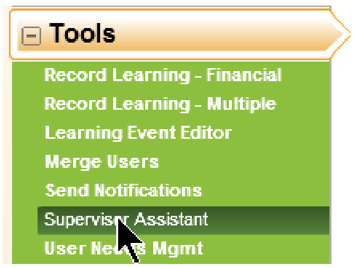
1. Select the **Users** button.



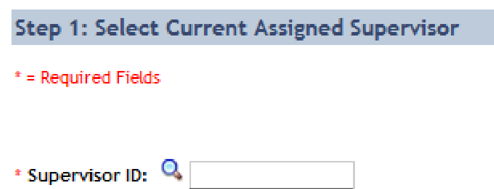
2. Expand the **Tools** menu.



3. Select **Supervisor Assistant**.

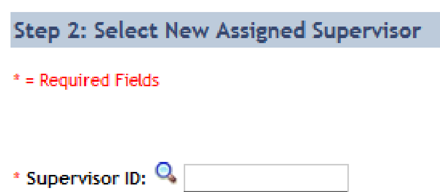


4. In the **Supervisor ID** text box, type the ID of the current supervisor, or click the **Search** icon to find and select one.



5. Click **Next**.

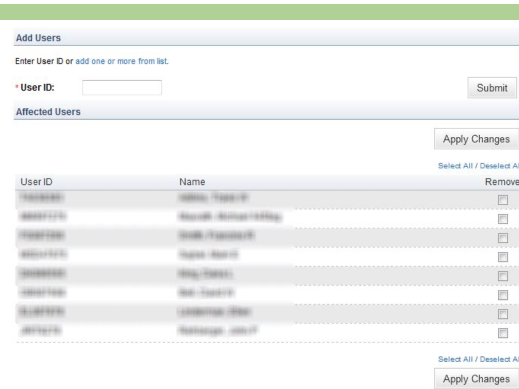
6. In the **Supervisor ID** text box, type the ID of the new supervisor, or click the **Search** icon to find and select one.



7. Click **Next**.

8. All users under the current supervisor appear. To add another user to the list, type the User ID in the **User ID** text box, or click the **Add one or more from list** link to use a search page and select multiple users.

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



Supervisor Assistant (1411)

Step	Activity	View
9.	When you are satisfied the list is complete, click **Next**.	
10.	Review the information. The user records displayed should reflect the new supervisor. If satisfied, click **Finish**. If not satisfied, click **Previous** to return to Step 8.	

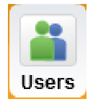
Assign an Item to an Individual User's To-Do List (1411)

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

The User Needs Management Assistant can also assign an Item to a user's To-Do List. See **Adding Items to User Record(s) with the UNM Assistant** for detailed information.

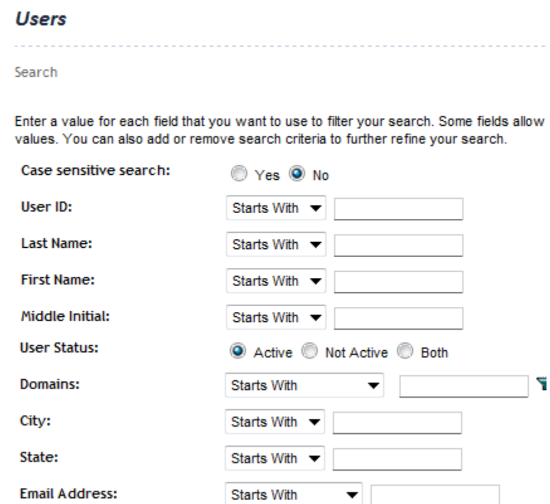
1. Select the **Users** button.

The Users search screen is the default.



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

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

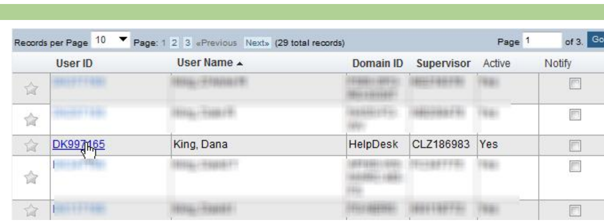


3. Click **Search**.

If the user is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain. If this is the case, open an ATAN ticket and Team AgLearn will assist you.

4. Locate the desired User record. Click on the **User ID** to open the record.

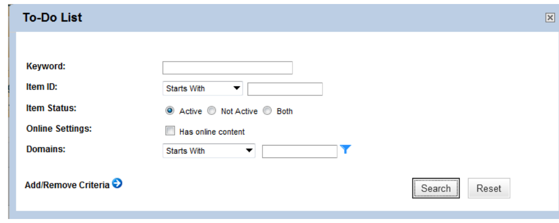
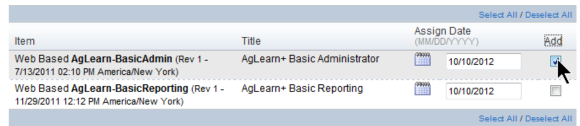
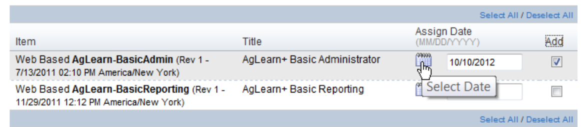
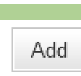
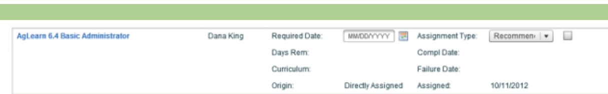
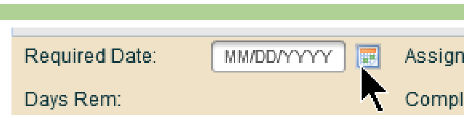
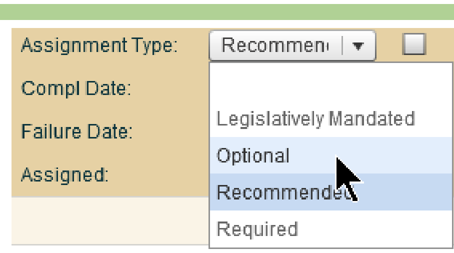
Tip: Use the **Ctrl+F** function to quickly find a user record on the screen.



5. Select the **To-Do List** link in the **Related** area at the lower left.

6. Click the **Add New To-Do List** button.

Assign an Item to an Individual User's To-Do List (1411)

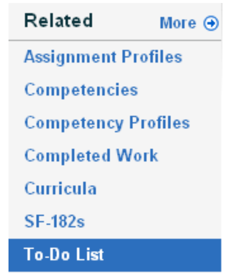
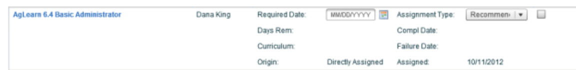
	Step	Activity	View
You may add search criteria as needed.	**7.**	Enter search criteria for the item you wish to add. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	8.	Click **Search**.	
	9.	On the **Results** list, locate the item (or items) to add to the To-Do List.	
Assign Dates cannot be in the future. This can cause some consternation when scheduling an assignment to run later. Initial periods may require adjustment to make Required Dates work out.	**10.**	If the assign date is not the current (default) date, select the **Assign Date** calendar icon to select and enter the actual assign date.	
	11.	Click **Add** to add the item and return to the To-Do List.	
	12.	Locate the item recently added.	
	13.	Click the corresponding **Required Date** calendar icon to enter the date by which the user must complete the Item.	
	14.	Select the corresponding assignment type from the **Assignment Type** drop-down list.	

Assign an Item to an Individual User's To-Do List (1411)

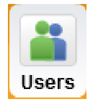
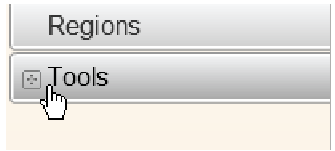
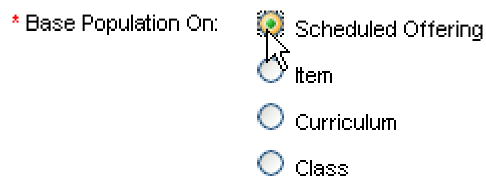
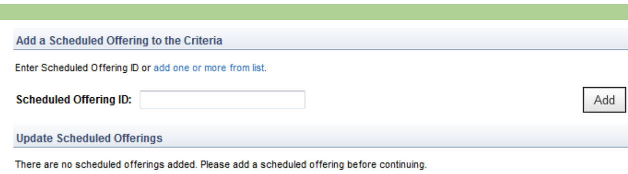
Step	Activity	View
15.	Click **Save**. **Caution**: Be sure to click **Save** before moving to any other component or data element or all changes and modifications will be lost.	

The User Needs Management Assistant can also remove an Item from a user's To-Do List. See **Removing Items From User Record(s) with the UNM Assistant** for detailed information.

Remove an Item from an Individual User's To-Do List (1411)

Step	Activity	View
1.	In the user's record, open the **To-Do List** (in the **Related** area).	
2.	Locate the item to be unassigned.	
3.	Select the **Remove** check box to mark the Item for removal from the To-Do List.	
4.	Click **Save**.	

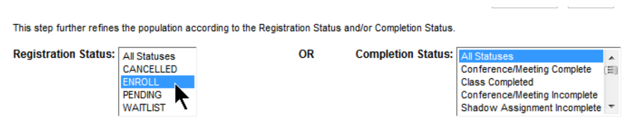
Ad Hoc Notifications (1411)

Step	Activity	View
1.	Click the **Users** button.	
2.	Select **Tools**.	
3.	Select **Send Notifications**.	
4.	Select the criterion for selecting recipients. For the purposes of demonstration, this example will use the screens that flow from selecting **Scheduled Offering**. The others are similar.	
5.	Click **Next**.	
6.	If you know the scheduled offering's ID number, enter it in the **Scheduled Offering ID** box, and click the **Add** button. If you don't know the scheduled offering ID, search for it by clicking the **Add one or more from list** link.	
7.	You can add multiple offerings. When you have all the offerings you want, click **Next**.	

Ad Hoc Notifications (1411)

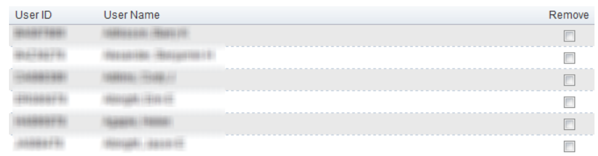
Step	Activity	View

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



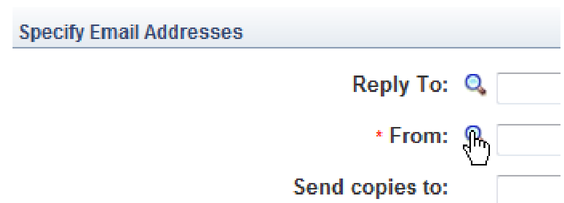
9. Click **Next**.

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



11. Click **Next**.

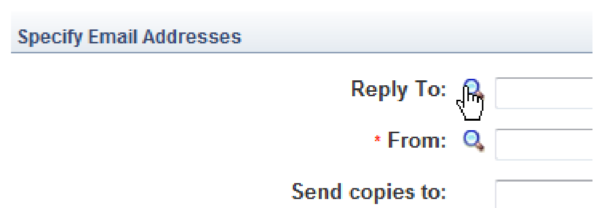
12. You may type an e-mail address into the **From** box, or search for one by clicking the **Search** icon. 



It's always a good idea to get permission first when directing replies to someone other than yourself.

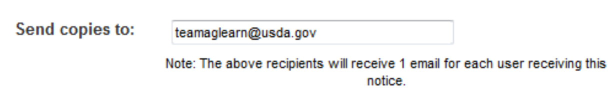
13. Enter the e-mail address you wish to receive any replies in the **Reply To** field. The e-mail address you enter in the **From** box in Step 3 will appear here by default if it is recorded in AgLearn.

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



Anyone receiving copies will receive a copy for each person who receives this email. Use discretion.

14. Type in the addresses of any others who should receive this e-mail in the **Send copies to** field. Separate multiple addresses with commas.

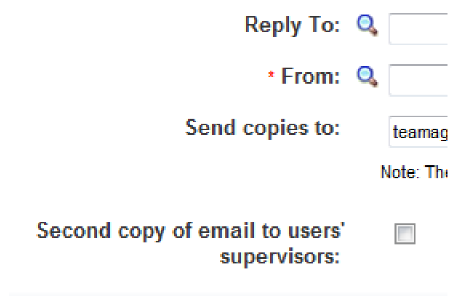


Ad Hoc Notifications (1411)

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

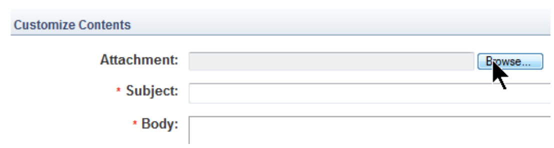
The supervisor will receive an email for every subordinate who receives a notification. Again, use discretion.

15. Check the **Second copy of email to users' supervisors** box if you would like to send a copy of the e-mail to the supervisor of each user listed.

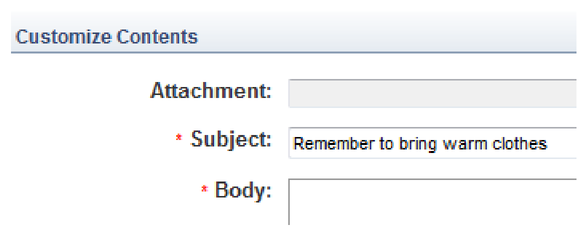


Create and attach a zip file if you need to send more than one file.

16. You may attach one file to the notification. Click the **Browse** button to search your computer for the file name and location.



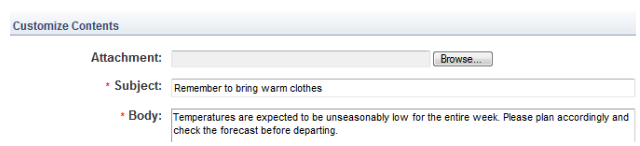
17. Type a subject or title for the notification in the **Subject** box.



It's never a bad idea to type your message in a word processing application such as Word, then copy and paste it into this box.

18. Type in the message you want to deliver and it will appear in plain text, with no formatting.

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



19. Click **Send Notification**.

If a user complains they did not receive the notification, ask them to check their Junk Mail folder. If it's not there, check their record in AgLearn to verify the e-mail address.

20. The **Finished** page confirms the notification message's transmission to the e-mail server.

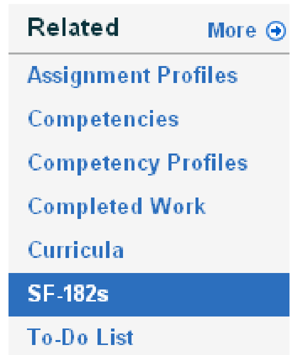
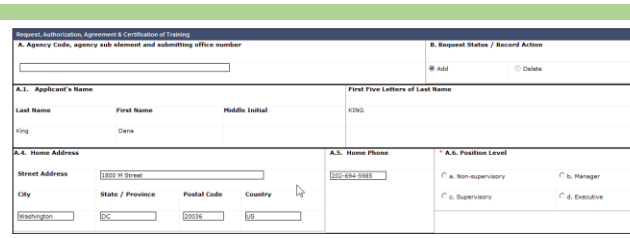
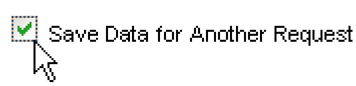
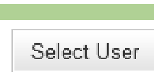
Click the **Start Over** button to re-start the wizard for another notification.

External Training Requests (1411)

Administrators are able to create SF-182 requests on behalf of employees, view and edit requests already in the pipeline, and make approvals as necessary. They can also submit requests as pre-approved (users cannot), and can backdate the SF-182 to accommodate training that has already taken place.

Creating an External Training Request on Form SF-182 (1411)

This guide describes the steps needed to perform these actions in AgLearn. Agency needs and policies regarding which data is to be entered in which field may vary and are not addressed. Please look for such answers within your agency.

Step	Activity	View
1.	Open the record of the user for whom you wish to create the external request and select **SF-182s** in the **Related** area.	
2.	Click the **New Request** button.	
3.	Part of the form automatically populates with data from the user's record. Complete as much of the form as necessary. Required fields will be marked with a red asterisk.	
4.	To bypass the normal approval process and submit the request as already approved, check **Submit Request as Approved**.	
5.	To save the non-personal, training-specific data for another user, check **Save Data for Another Request**.	
6.	To choose another User's record to apply the data saved in Step 5, click **Select User**.	

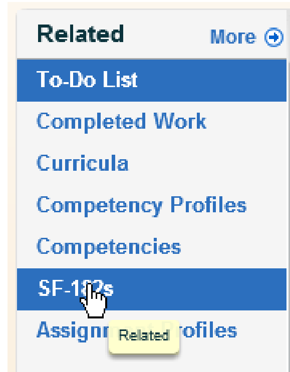
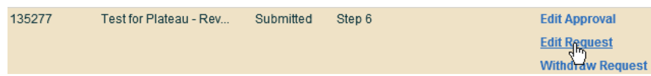
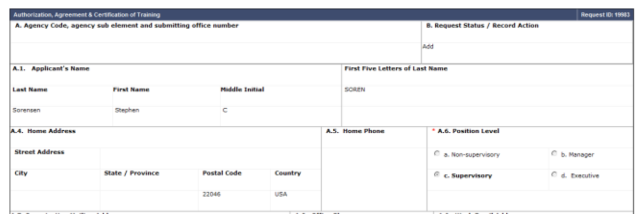
You must click **Submit** after checking this box to submit the request for the original user.

You must click **Submit** *before* **Select User** to submit the request for the original user.

7.	To clear any changes made to the form, click **Reset**.	
8.	To save your changes in draft form to submit them later, click **Save Draft.**	
9.	To submit the completed form for approval, click **Submit**.	

Some administrators may also see an **Edit Approved Request** option as well. The process is the same.

Editing an SF-182 Form (1411)

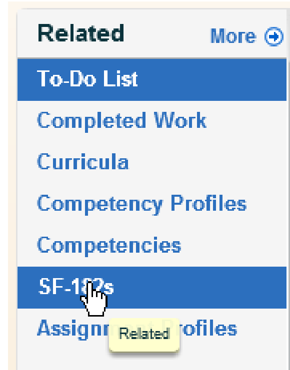
Step	Activity	View
1.	Find the user's record you wish to edit and click the **SF-182 Requests** tab.	
2.	Click the **Edit Request** link for the request you wish to edit.	
3.	The SF-182 pops up in a new window. Make the necessary changes.	
4.	Click **Apply Changes** to save the changes.	
5.	When finished, click the **Close** button.	

Approving (on Denying) an SF-182 Form (1411)

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

It's always a good idea to have written authorization from someone with the authority to do so before approving or denying an SF-182 as an administrator.

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

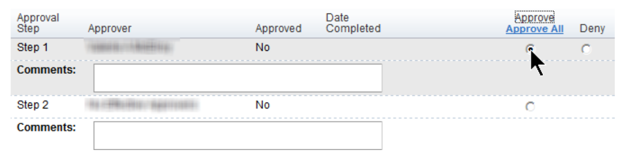


2. Click the **Edit Approval** link for the request you wish to approve.

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

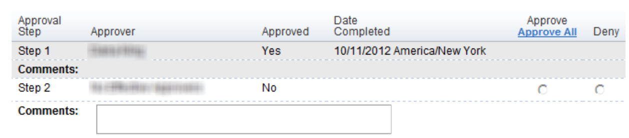
3. Click the option button for **Approve** or **Deny**.

Note: Team AgLearn recommends you include comments as to why you took this action and to cite your authorization for doing so.

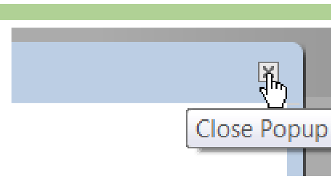


4. Click **Apply Changes**.

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



6. Click **X** in the upper right corner to close the pop-up.

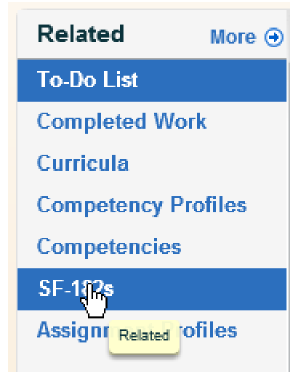


This guide describes the steps needed to perform these actions in AgLearn. Agency needs and policies regarding which data is to be entered in which field may vary and are not addressed. Please look for such answers within your agency.

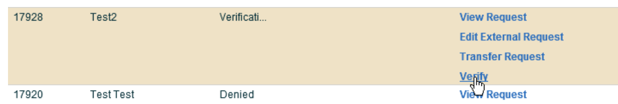
Verifying External Training Requested via Form SF-182 (1411)

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

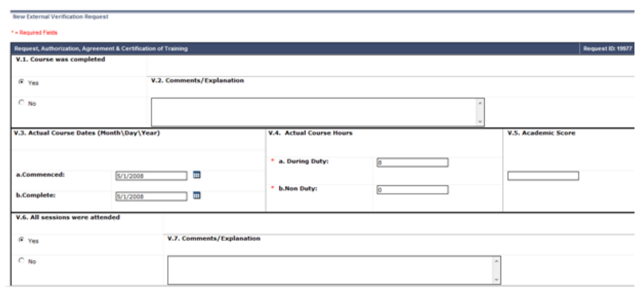
1. After the External Training event has taken place, the User must verify his or her attendance. In the User's record, click **SF-182 Requests**.



2. Click the **Verify** link for the request you wish to verify.

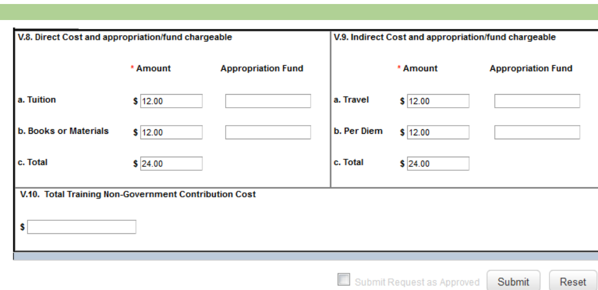


3. Complete the form.



4. Click **Submit** to send the form to the User's supervisor for approval. This allows the event to move into Learning History.

Note: If you are also approving the verification to move into Learning History, check the **Submit Request as Approved** box before clicking **Submit**.



5. If the verification still requires approval, confirm the supervisor's name and click **Submit**.

Managing Training Approval Processes (1411)

AgLearn has the ability to manage multiple multi-level training approval processes. Team AgLearn handles the creation of approval processes and roles; agency administrators may associate specific approval processes with items and scheduled offerings.

An approval process may have as many as six steps, though six-step approvals will be rare. A user’s two immediate supervisors are automatically set up in the system to fill two default approval roles; many Items may only require a supervisor approval.

Seven other roles exist for more complicated processes. These grant each agency the flexibility to use the processes best suited to their needs, and appropriate for each Item. Agencies may map approval roles such as Budget, Training Coordinator, and Training Officer to specific individuals if those titles exist in your agency. More generic roles (Approver 1, Approver 2, Reviewer, and Final Approver) exist for processes that need more flexibility in the selection of personnel to fill each role. Each process lists the roles included; roles may be included in more than one process.

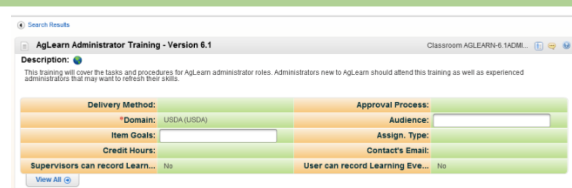
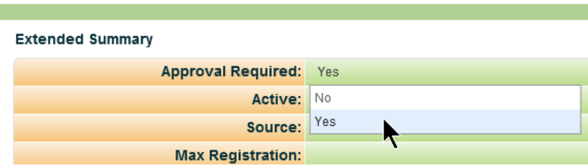
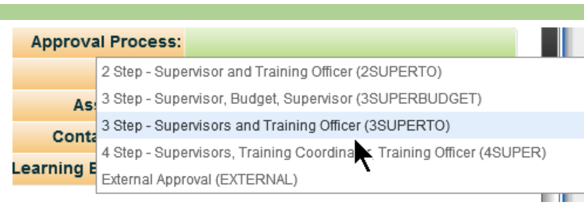
To assign new approval roles to users, or to request the creation of a new approval process, contact Team AgLearn.

There are two key things to remember about the approval processes mentioned here:

1. They apply only to AgLearn items. SF-182 approvals are an entirely different process. Only Team AgLearn can make changes to SF-182 approval processes. If you have questions, please open an ATAN ticket.
2. If a scheduled offering requires approval, the user will not have a registration status of “Enrolled” until the approval process is complete. Likewise, online items will not launch until all necessary approvals are in place.

Add a Training Approval Process to an Existing Item (6.4)

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

Step	Activity	View
1.	Open the record of the item to which you want to add an approval process.	
2.	Select the **View All** link.	
3.	Hover the mouse over the **Approval Required** field until the drop-down appears. Select **Yes**.	
4.	Hover the mouse over the **Approval Process** field until the drop-down appears. Select the approval process you want to associate with this item.	

The process is identical for associating an approval process with a scheduled offering, except, of course, in Step 1 you search for and open the scheduled offering.

5. Click **Save**.

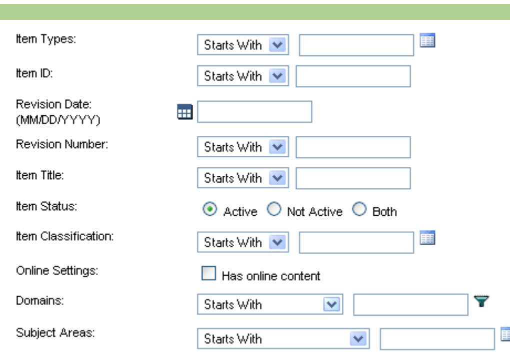
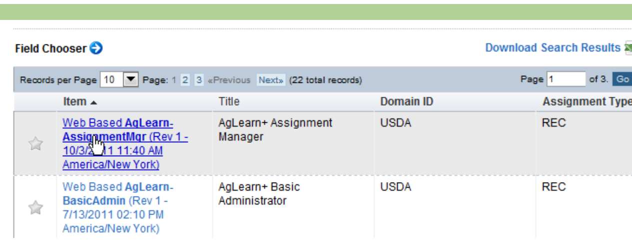
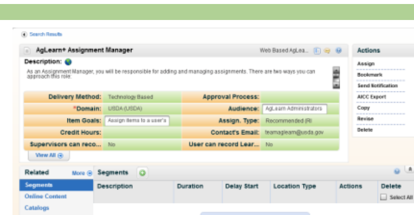
Managing Items (1411)

An item is a container for a unit of learning you can assign to a user and track subsequent completions. An item can consist of online content, a classroom event, a video, on the job training (OJT), a webinar, or an external certification.

When creating or copying an item, it's a good idea to read through the steps below and have all the necessary information at hand before beginning work in AgLearn. The goal is not to have to make any decisions once you start to type (or, even better, copy and paste) the information info AgLearn.

Always create new items in Staging first, as errors made there have no effect on any real records. It is a practice environment.

Searching For and Opening an Item Record (1411)

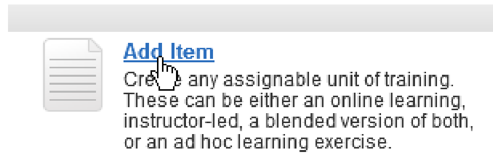
	Step	Activity	View
	1.	Select the Learning button.	
The Items Search screen is the default landing spot.	2.	On the **Items > Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searchig.	
	3.	Click **Search**.	
Use Ctrl+F to quickly find an Item on the screen.	4.	On the **Results** display, click the link to open the desired Item. **Note**: If this is an item you may need to come back to, you can bookmark it now.	
	5.	Navigate the item as needed to view the data required. **Note**: You will only be able to edit entries if you have Edit rights.	

Adding an Instructor-Led Item Record (1411)

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

Instructions on how to configure your Home Page are in the AgLearn+ Basic Administrator online course.

1. On your Home Page, select the Quick Link to **Add Item**.



2. Select the kind of item you want to create. There are four choices:

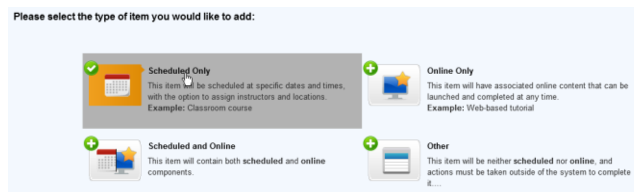
Scheduled Only creates segments necessary for future scheduled offerings when creating instructor-led training.

Online Only requires online content to be loaded to the content server and is used for training to be taken online at the user's convenience.

Scheduled and Online contains both segments and online content.

Other has neither segments nor online content and applies to physical goods, such as books or CDs.

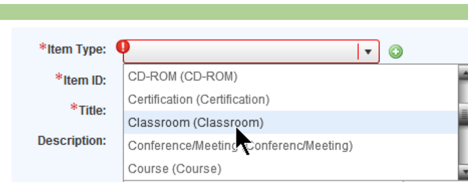
Select **Scheduled Only**.



3. Click **OK**.

Live webinars are also scheduled items, but the Item Type should be Virtual Classroom.

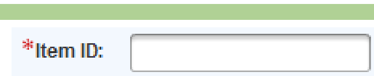
4. Select Classroom from the **Item Type** drop-down list.



The Item ID should always begin with your Agency acronym. Consult with your AgLearn agency lead for the established naming conventions for Items.

5. Enter an **Item ID**.

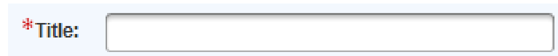
All capital letters with sections separated by hyphens is the preferred convention.



Adding an Instructor-Led Item Record (1411)

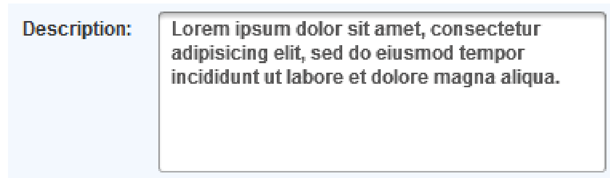
Step **Activity** **View**

6. Enter an **Item Title**.



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

7. Enter a **Description** for the item.

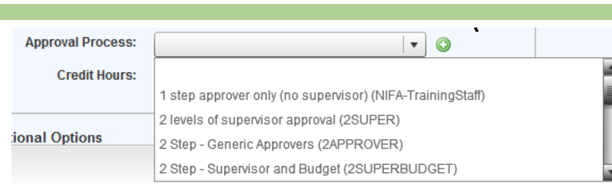


The default domain is PUBLIC. Never, ever, leave an item in the PUBLIC domain, as any administrator will be able to take action on it.

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

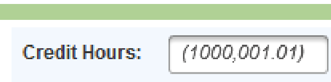
Approval processes are rarely required for items.

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



Obtain information on credit hours from the course owner.

10. If the item has a specified number of **Credit Hours**, enter them here.



11. If Additional Options are needed, click the ⊞ to expand the area and complete the fields as needed.

Additional Options include:

Revision Date

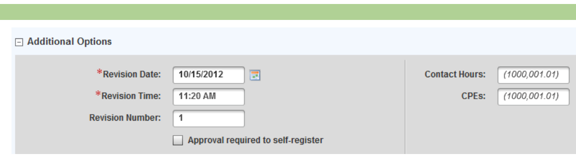
Revision Time

Revision Number

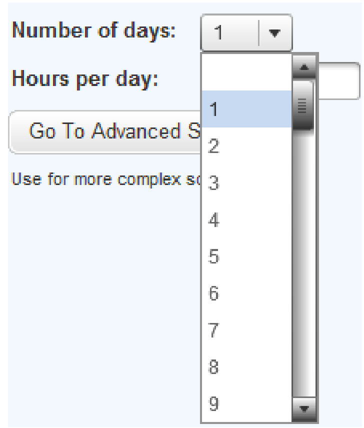
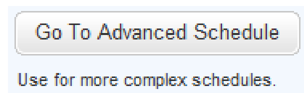
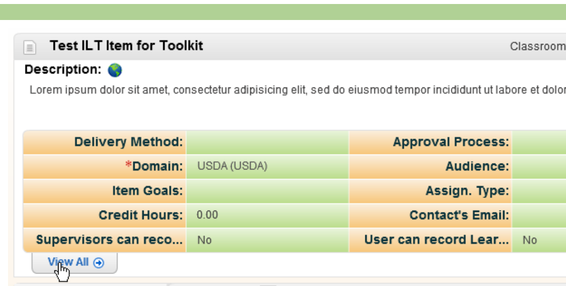
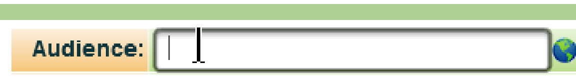
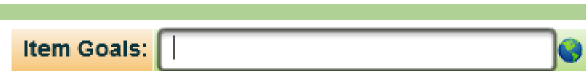
Contact Hours

CPEs

If you selected an approval process in Step 9, check the **Approval required to self-register** box.



Adding an Instructor-Led Item Record (1411)

Step	Activity	View
12.	Select the number of days training will last from the **Number of Days** drop-down.	
13.	Enter the number of hours training will last each day.	
14.	If not every day will be the same length as indicated in Step 13, click **Go To Advanced Schedule** and configure the segments individually.	
15.	When satisfied everything is correct, click **Save & Exit.**	
16.	AgLearn takes you to the item's summary page. We're still missing several key pieces of information. Click **View All** to expand the summary information.	
17.	Enter the intended **Audience**.	
18.	Enter the **Item Goals**.	

Due to AgLearn's configurability, your screen may display more or fewer fields, or may display items in a different order. You may have to scroll down to find all the fields in Steps 17-21.

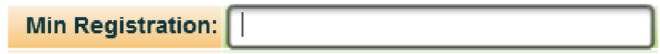
Step 17 – 21 do not constitute a comprehensive list of what you may wish to include. Other fields may be desirable. Use your best judgment to add what you need, as it will make creating subsequent scheduled offerings easier.

Adding an Instructor-Led Item Record (1411)

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

19. Enter the minimum number of students for which an offering will take place.

Note: Each scheduled offering can have a different minimum.



20. Enter the maximum number of students allowed in an offering.

Note: Each scheduled offering can have a different maximum, depending on room size, available resources, etc.

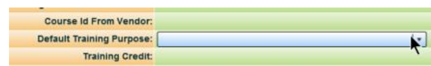
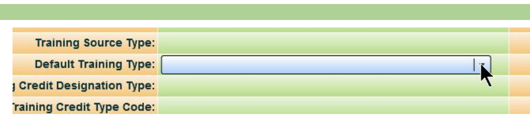
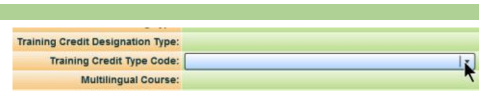
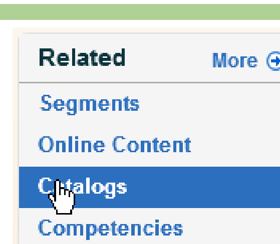
21. Use the drop-down menu to set **Enable User Ratings** to Yes.

Note: This is what enables users to select Amazon-style ranking to items they have completed. AgLearn compiles the responses and includes them in the item's catalog entry.

22. Enterprise Human Resources Integration (EHRI) is one of five OPM-led e-Government initiatives designed to leverage the benefits of information technology. As such, USDA transmits certain relevant training information to OPM via AgLearn. Providing this information to AgLearn is your responsibility when creating an item.

Scroll down to the **Extended Summary** area.

Adding an Instructor-Led Item Record (1411)

Step	Activity	View
23.	The first EHRI field is **Training Accreditation Indicator**. Click to open the drop-down menu and select the appropriate choice.	
24.	The next EHRI field is **Training Source Type.**	
25.	Next is **Default Training Purpose.**	
26.	Followed by **Default Training Type**.	
27.	Then, **Training Credit Designation Type**.	
28.	**Training Delivery Type** is next.	
29.	**Training Credit Type Code** is the antepenultimate field.	
30.	And, finally, **Continuing Service Agreement Required**.	
31.	With EHRI out of the way we can turn our attention to other important things to include. Click the **Catalog** tab if the item is to appear in a catalog.	

Adding an Instructor-Led Item Record (1411)

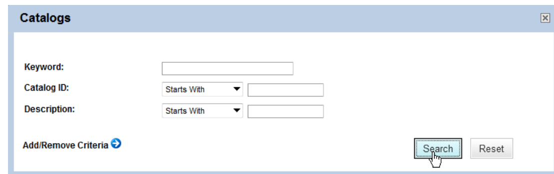
Step **Activity** **View**

Items do not have to appear in any catalogs, but if the item is not in a catalog, associated scheduled offerings will not be, either.

32. Click the  to add the item to a catalog.

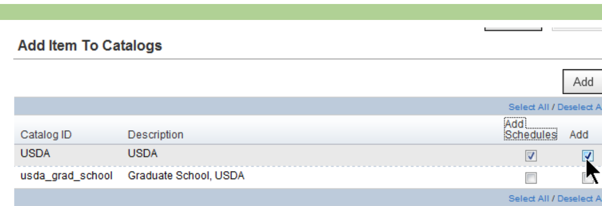
Due to AgLearn's configurability, your search screen may differ in appearance.

33. Search for the catalog to add in the resulting pop-up.



34. Select the catalog of your choice from the search results by checking the Add box.

Select **Add Schedules** to automatically add future scheduled offerings to the catalog.



35. Click **Add**.

Use flags to draw users' attention to an item's catalog listing.

36. Select a **Flag**, if necessary.

37. Indicate the last day of the flag's appearance.

38. Enter text in the **Reason** box. This will appear to the user when the cursor passes over this Item in the catalog.

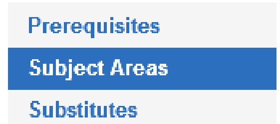
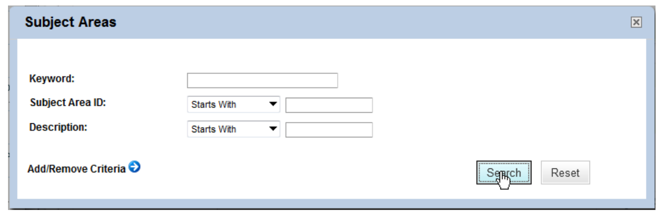
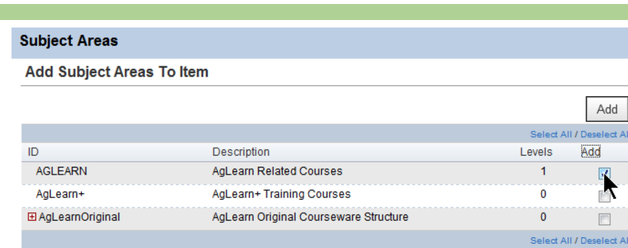
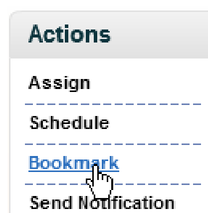
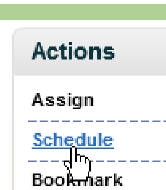
If you're not sure, enter your best good faith estimate. You can always change it later.

39. Enter an expiration date for the item in the **Expires** field.

Note: All new AgLearn items should have catalog expiration dates.

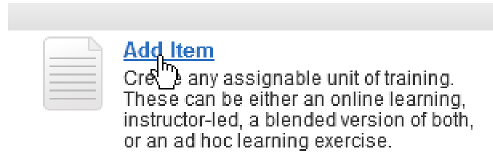
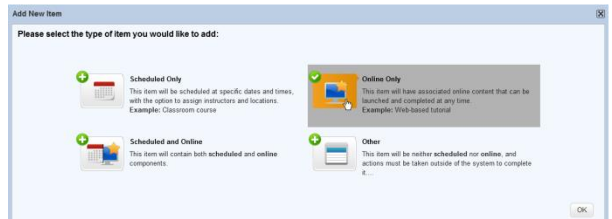
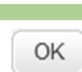
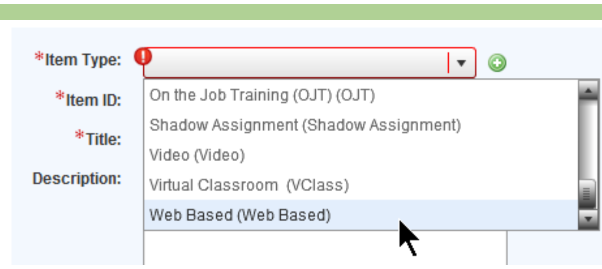
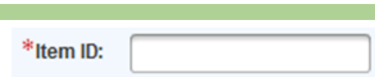
Adding an Instructor-Led Item Record (1411)

AgLearn will drop you on a search results screen. Scroll up to get to the search screen.

Step	Activity	View
40.	Click **Subject Area** if you wish to add a subject area to the item's catalog entry.	
41.	Click  to add a subject area.	
42.	Search for the subject area or areas to add in the resulting pop-up. **Note**: Due to AgLearn's configurability, your search screen may differ in appearance.	
43.	Select the subject area(s) of your choice from the search results by checking the Add box.	
44.	Click **Add**.	
45.	To Bookmark this item for easy reference, click the **Bookmark** link in the Actions area.	
46.	To create a scheduled offering for this item, click the **Schedule** link.	

Adding an Online Item Record (1411)

Instructions on how to configure your Home Page are in the AgLearn+ Basic Administrator online course.

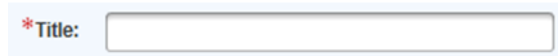
Step	Activity	View
1.	On your Home Page, select the Quick Link to **Add Item**.	
2.	Select the kind of item you want to create. There are four choices: **Scheduled Only** creates segments necessary for future scheduled offerings when creating instructor-led training. **Online Only** requires online content to be loaded to the content server and is used for training to be taken online at the user's convenience. **Scheduled and Online** contains both segments and online content. **Other** has neither segments nor online content and applies to physical goods, such as books or CDs. Select **Online Only**.	
3.	Click **OK**.	
4.	Select Web Based from the **Item Type** drop-down list.	
5.	Enter an **Item ID**. All capital letters with sections separated by hyphens is the preferred convention.	

The Item ID should always begin with your Agency acronym. Consult with your AgLearn agency lead for the established naming conventions for Items.

Adding an Online Item Record (1411)

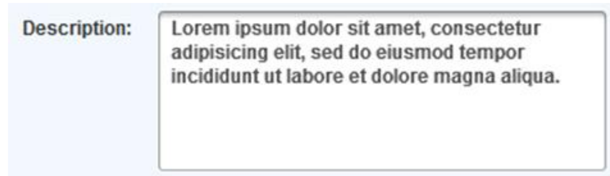
Step	Activity	View

6. Enter an **Item Title**.



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

7. Enter a Description for the item.

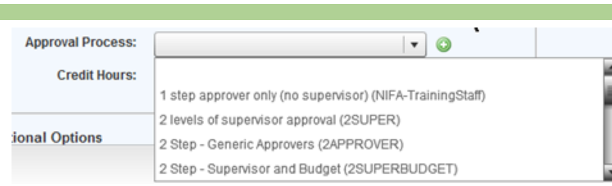


The default domain is PUBLIC. Never, ever, leave an item in the PUBLIC domain, as any administrator will be able to take action on it.

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

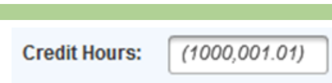
Approval processes are rarely required for items.

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



Obtain information on credit hours from the course owner.

10. If the item has a specified number of **Credit Hours**, enter them here.



11. If Additional Options are needed, click the ⊞ to expand the area and complete the fields as needed.

Additional Options include:

Revision Date

Revision Time

Revision Number

Contact Hours

CPEs

If an Approval Process is required, check the **Approval required to self-register** box.

12. When satisfied everything is correct, click **Save & Exit.**

Adding an Online Item Record (1411)

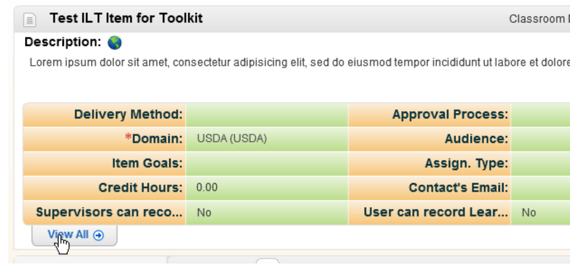
Due to AgLearn's configurability, your screen may display more or fewer items, or may display items in a different order. You may have to scroll down to find all the fields in Steps 14 – 16.

Step 14 – 16 do not constitute a comprehensive list of what you may wish to include. Other fields may be desirable, such as whether to permit students to self-enroll, place themselves on the wait or request lists, and what kind of training room is required. Use your best judgment to add what you need.

Step	Activity	View

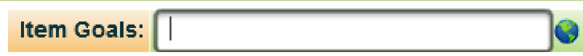
13. AgLearn takes you to the item's summary page. We're still missing several key pieces of information.

Click **View All** to expand the summary information.



14. Enter the intended **Audience**.

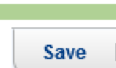
15. Enter the **Item Goals**.



16. Use the drop-down menu to set Enable User Ratings to Yes.

Note: This is what enables users to select Amazon-style ranking to items they have completed. AgLearn compiles the responses and includes them in the item's catalog entry.

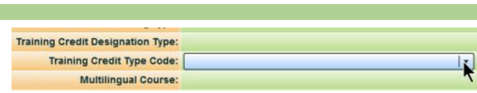
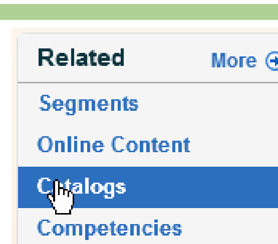
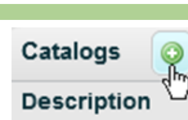
17. When you have completed all the necessary changes, click Save.



18. Enterprise Human Resources Integration (EHRI) is one of five OPM-led e-Government initiatives designed to leverage the benefits of information technology. As such, USDA transmits certain relevant training information to OPM via AgLearn. Providing this information to AgLearn is your responsibility when creating an item.

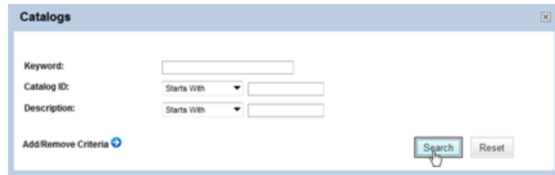
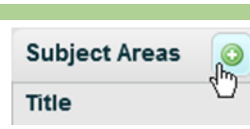
Scroll down to the **Extended Summary** area.

Adding an Online Item Record (1411)

Step	Activity	View
19.	The first EHRI field is **Training Accreditation Indicator**. Click to open the drop-down menu and select the appropriate choice.	
20.	The next EHRI field is **Training Source Type.**	
21.	Next is **Default Training Purpose.**	
22.	Followed by **Default Training Type.**	
23.	Then, **Training Credit Designation Type**.	
24.	**Training Delivery Type** is next.	
25.	**Training Credit Type Code** is the antepenultimate field.	
26.	And, finally, **Continuing Service Agreement Required**.	
27.	With EHRI out of the way we can turn our attention to other important things to include. Click the **Catalog** tab if the item is to appear in a catalog.	
28.	Click the  to add the item to a catalog.	

Items do not have to appear in any catalogs, but if the item is not in a catalog, associated scheduled offerings will not be, either.

Adding an Online Item Record (1411)

	Step	Activity	View
Due to AgLearn's configurability, your search screen may differ in appearance.	29.	Search for the catalog to add in the resulting pop-up.	
	30.	Select the catalog of your choice from the search results by clicking the Add box.	
	31.	**Click Add.**	
Use flags to draw users' attention to an item's catalog listing.	32.	Select a **Flag**, if necessary.	
	33.	Indicate the last day of the flag's appearance.	
	34.	Enter text in the **Reason** box. This will appear to the user when the cursor passes over this Item in the catalog.	
If you're not sure, enter your best good faith estimate. You can always change it later.	35.	Enter an expiration date for the Item in the **Expires** field. **Note**: All new AgLearn items should have catalog expiration dates.	
	36.	Click **Subject Area** if you wish to add a subject area to the item's catalog entry.	
	37.	Click  to add a subject area.	

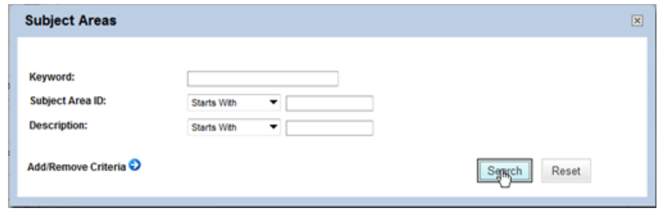
AgLearn will drop you on a search results screen. Scroll up to get to the search screen.

Adding an Online Item Record (1411)

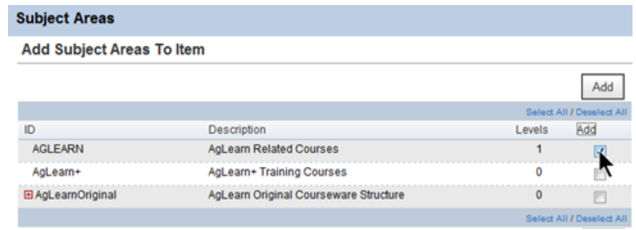
Step | **Activity** | **View**

38. Search for the subject area or areas to add in the resulting pop-up.

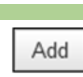
Note: Due to AgLearn's configurability, your search screen may differ in appearance.



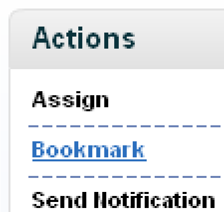
39. Select the subject area(s) of your choice from the search results.



40. Click **Add**.



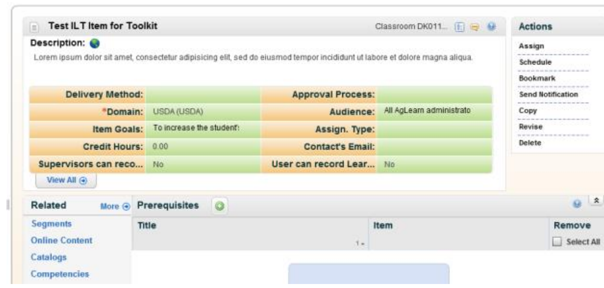
41. To Bookmark this item for easy reference, click the **Bookmark** link in the Actions area.



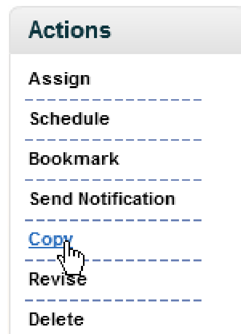
Copying an Item Record (1411)

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

1. Open the record of the item you wish to copy.



2. Click the **Copy** link in the Actions area.

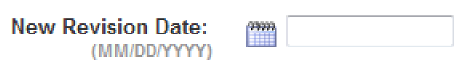


3. Select the Item Type for the new item from the **New Item Type ID** drop-down.

4. Enter the **New Item ID**.

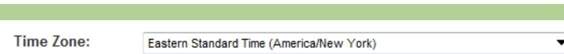
The Item ID should always begin with your Agency acronym. Consult with your AgLearn Agency Lead for the established naming conventions for Items.

5. Click the **New Revision Date** Calendar icon and select a new revision date for the Item. The default will be today's date.



6. Enter a **Revision Time**. The default will be now.

7. Select the correct **Time Zone** from the Time Zone drop-down list.



Select the boxes in Steps 8 – 17 only if you want AgLearn to perform the action specified. This will vary from item to item.

Copying an Item Record (1411)

Step	Activity	View
8.	Select **Copy Authorized to Instruct Data** to copy this data to the new Item.	Copy Authorized to Instruct Data
9.	Select **Copy Substitutes Data** to copy this data to the new Item.	Copy Substitutes Data
10.	Select **Copy Related Competency Data** to copy this data to the new Item.	Copy Related Competency Data
11.	Select **Copy Related Document Data** to copy this data to the new Item.	Copy Related Document Data
12.	Select **Copy Related Task Data** to copy this data to the new Item.	Copy Related Task Data
13.	Select **Copy Prerequisite Data** to copy this data to the new Item.	Copy Prerequisite Data
14.	Select **Copy Request Data** to copy this data to the new Item.	Copy Request Data
15.	Select **Copy Online Settings** to copy this data to the new Item.	Copy Online Settings
16.	Select **Copy Instructor Costs** to copy this data to the new Item.	Copy Instructor Costs
17.	Select **Add the new Item to the catalog** to add the item to the catalog.	Add the new item to the catalog
18.	Click **Copy**. The new item will appear.	Copy

Tip: To avoid data formatting errors when entering dates, use the Calendar Icon Assistant.
Note: See **Using the Calendar Icon Assistant** for more detailed information pertaining to the Calendar icon.

The Item Revision Wizard (1411)

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

Revising an item creates a new version you can track separately from previous versions. Substantial change to the content is the typical reason for a revision, though not a requirement. You may create a new AgLearn version for even incremental changes. You should not, however, revise the current version of an item when you find a small mistake, such as a typo, or a segment that isn't the correct length. These are easily fixed, and make no real change to the educational content. Open an ATAN ticket if you are unsure whether a proposed change is significant enough to require a formal revision.

Users already assigned the older version will be prompted with the option to access the new revision of the item. If they do so, the new revision of the item replaces the old on their To-Do List, if it is not already there.

The **Item Revision Wizard** steps include:

Step 1: Item Revision (Revision # and Date);

Step 2: Item Revision (Relationships and Instructors);

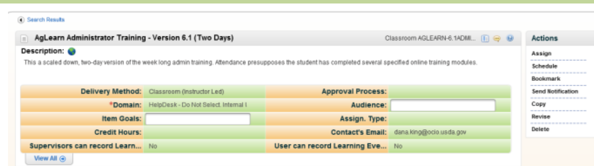
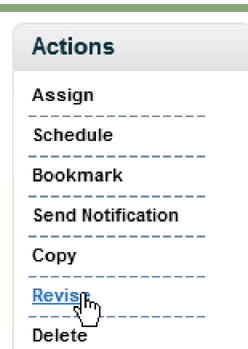
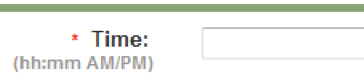
Step 3: Item Revision (Making Item Production Ready);

Step 4: Item Revision (Update Curricula and To-Do Lists)**;**

Final Step: Complete, (Displays all of the choices made in previous steps)

The Item Revision Wizard (1411)

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

Step	Activity	View
1.	Open the record of the item for which you want to create a revision.	
2.	In the **Actions** area, click **Revise**.	
3.	Click the **New Revision Date** calendar icon to select and enter a revision date.	
4.	Enter a revision time in the **Time** field.	

No one really cares about the revision time

The Item Revision Wizard (1411)

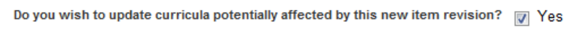
	Step	Activity	View
and time zone. Using the current time and the default time zone is fine unless instructed otherwise.	**5.**	Click the **Time Zone** dropdown box to search for and select a Time Zone.	Time Zone: Eastern Standard Time (America/New York)
Increments do not have to be in whole numbers. If the change in this revision is small, changing from 1 to 1.1 is fine.	**6.**	Enter a **Revision Number**.	Revision Number:
	7.	Enter a revised **Title**, if applicable.	Title: AgLearn Administrator Training - Version 6.1 (Two Days)
	8.	Click **Next**.	Next
	9.	Select the **Yes** check box to copy the substitute relationships for this item to the new revision.	Do you wish to copy the substitute relationships for this item to the new revision? Yes
	10.	Select the **Yes** check box to allow all authorized instructors to retain their authorization to teach the new, revised item.	Do you wish to change all authorized instructors to the new revision? Yes
This check box only appears when revising an online item.	**11.**	Select the **Yes** check box to include the online settings in the new revised item.	This item has online settings. Do you wish to include the online settings in the new revision of this item? Yes
It's up to you whether to roll ratings received for the previous version into those for the new, or to start fresh.	**12.**	Select the **Yes** check box to include existing user ratings in the new revision of the item	This item has user ratings. Do you wish to include these ratings in the new revision of the item? Yes
	13.	Click **Next** to move to Step 3.	Next
	14.	Click one of the option buttons to indicate whether to make the new revision of this Item production ready.	Make this item production ready. Do not make this item production ready.
	15.	Click **Next** to move to Step 4.	Next
Do not take Steps 16 – 19 lightly. Consider the ramifications of each,	**16.**	Select the **Yes** check box to inactivate previous revisions of this Item.	Do you wish to inactivate previous revisions of this item? Yes

as they are nearly impossible to undo.

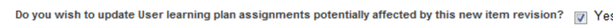
The Item Revision Wizard (1411)

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

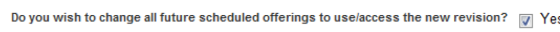
17. Select the **Yes** check box to update all curricula potentially affected by the new revision.



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

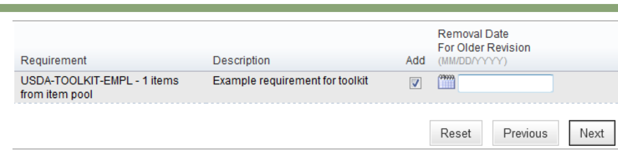


19. Select the **Yes** check box to change all future scheduled offerings to use/access the new revision.



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

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

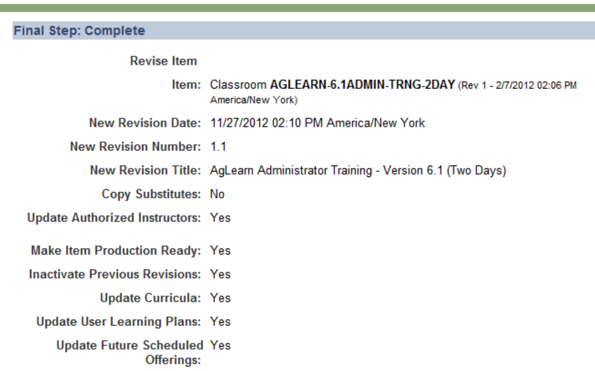


22. Click **Next** to move to the Final Step.

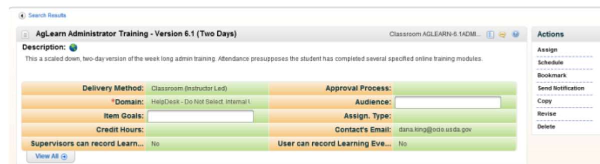
If you go back more than one step using the **Previous** button, you will have to recreate the actions you performed in the steps you skipped over.

23. Review the selections made and data entered in the previous steps.

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



The Item Revision Wizard (1411)

	Step	Activity	View
The total number of records affected may well exceed 2,000 if you chose to update To-Do Lists in Step 18, in which case you should schedule the job to run after hours.	**24.**	Click **Run Job Now** or **Schedule Job** to have AgLearn complete the assignment to User record(s). **Caution**: If a Validation Error appears, you must correct the errors before the Wizard can schedule the job. **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
The revision process is complete at the conclusion of Step 24. You will have to re-open the item record to perform Step 25. Fortunately it will be at the top of your **Recent** list, even if you forgot to bookmark it.	**25.**	Review and revise any of the other Item data as required. **Note**: See **Edit an Item Record** for more information on editing Items.	

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

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

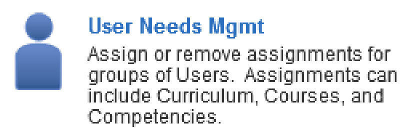
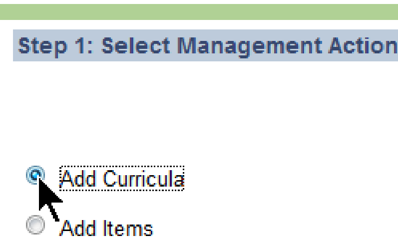
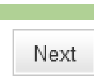
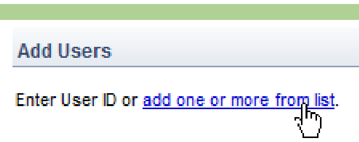
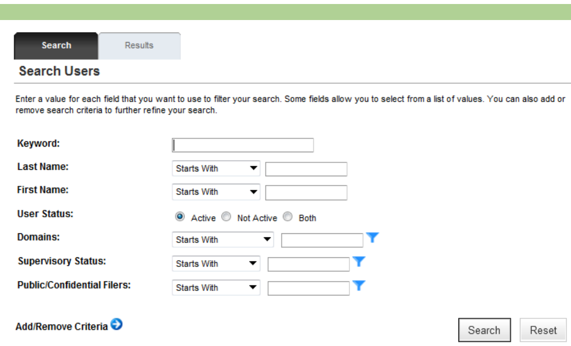
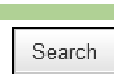
User Needs Management (1411)

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

The User Needs Management Wizard is available from the home page, the Search bar, or from the **Users** button, under **Tools**.

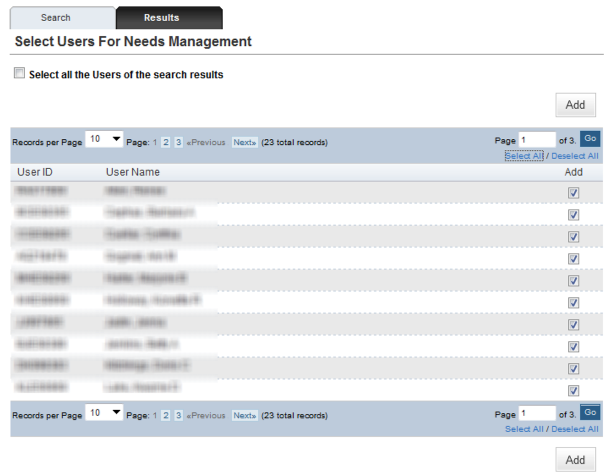
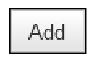
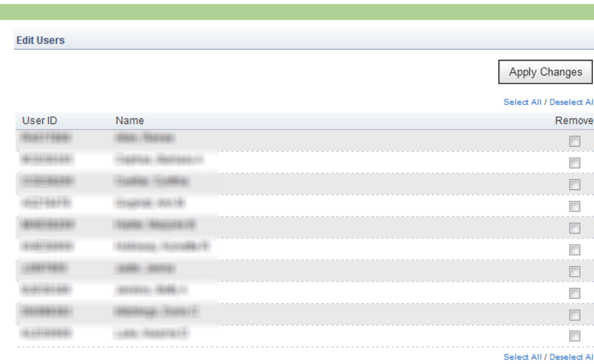
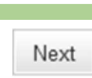
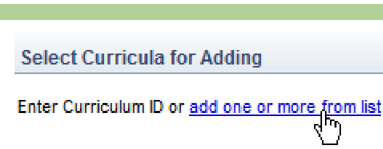
User Needs Management Wizard tasks include **Add Curricula**, **Add Items**, **Add Competency Profiles**, **Add Competencies**, **Add Job-related Curricula**, **Add Job-related Competency Profiles**, **Remove Curricula**, **Remove Items**, **Remove Competency Profiles**, and **Remove Competencies.**

Add Curricula to User Record(s) with the UNM Wizard (1411)

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

Add Curricula to User Record(s) with the UNM Wizard (1411)

The **Select all the Users of the search results** check box is unreliable. Do not use it.

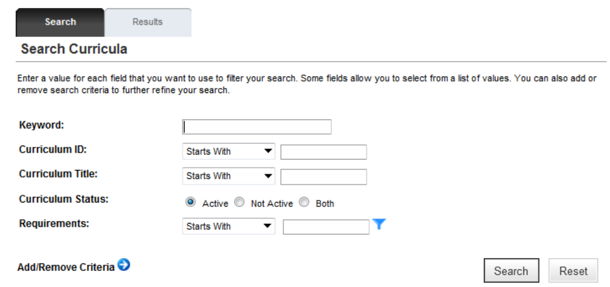
Step	Activity	View
7.	On the **Results** tab, select the corresponding **Add** check box for each User to add. **Note:** Clicking the Select All link will only select the users visible on the current screen. To select all names returned in the search, open the Records per Page drop-down and select All, then Select All after the expanded list displays.	
8.	Click **Add**.	
9.	Review the Users in the **Edit Users** section. **Tip**: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.	
10.	Click **Next** to move to Step 3.	
11.	Select the **Add one or more from list** link to search for and enter Curricula into the UNM Wizard. **Note:** You can paste the ID directly into the Curriculum ID field. Beware of trailing spaces and inaccurate capitalization. Searches are far more forgiving.	

Add Curricula to User Record(s) with the UNM Wizard (1411)

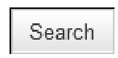
Step | **Activity** | **View**

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

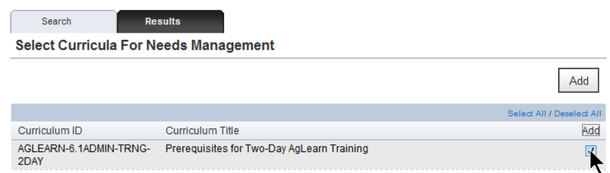
Note: See **Managing Data Entry and Searches** for more detailed information on searching.



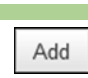
13. Click **Search**.



14. On the **Results** tab, select the corresponding **Add** check box for each curriculum to add.

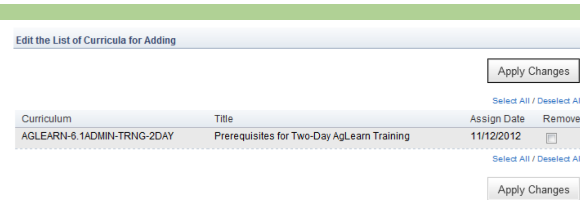


15. Click **Add**.

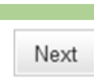


16. Review the curricula in the **Edit the List of Curricula for Adding** section.

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



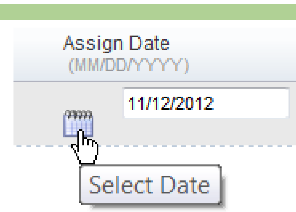
17. Click **Next** to move to Step 4.



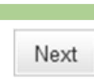
Assign dates allow AgLearn to determine Required Dates for curricula that have them. Assign dates can be set in the past, but not in the future

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

Note: The current date is the default date.

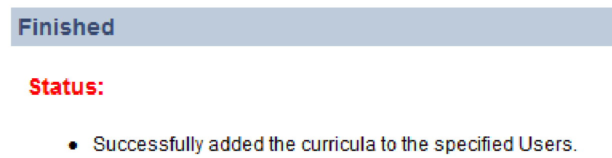


19. Click **Next** to move to Step 5.



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

Add Curricula to User Record(s) with the UNM Wizard (1411)

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

Direct Linking (1411)

AgLearn has the capability of providing HTML hyperlinks to specific pages in AgLearn so users can directly access the pages. These links can be embedded in any environment accepts HTML URLs, including e-mail notifications, Web pages, and documents. The user can click the link and move directly to the appropriate page. (After providing login information if he or she is not already logged in.)

The use of direct links does not compromise security. Users will have access only to those sections of the application their assigned workflow restrictions allow and will have to enter their login credentials before entering AgLearn.

The Direct Linking Wizard creates the link after you have chosen the page. You can paste it into an e-mail or automatic notification so that the user can click the link or copy and paste it to reveal the exact page you want them to see. You cannot choose to insert the link into notification tags.

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

All AgLearn learning pages – Including To-Do List, Home page, Catalog Simple Search page, Completed Work page, Current Registration page, and the Employee Subordinates page. URL is the only output option available for these pages.

Item Details – Takes the user to the specified Item Details page.

Scheduled Offering Details – Takes the user to the specified scheduled offering's Details page.

Registration – Directs the User to the Registration page of the specified scheduled offering.

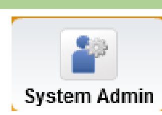
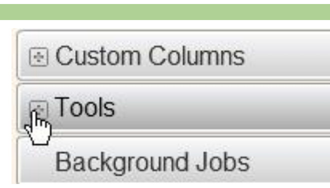
Online Content Structure – Directs the User to the Online Content Structure page for the Item specified.

Report – Creates a link to the specified User Report. (**Note**: Administrator reports are not available for direct linking.)

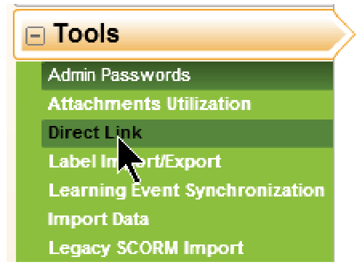
Reports with Criteria - Creates a link to the specified User Report and allows you to specify the criteria for the report before creating the link.

Once created, you may copy and paste the link in an e-mail, document, or notification.

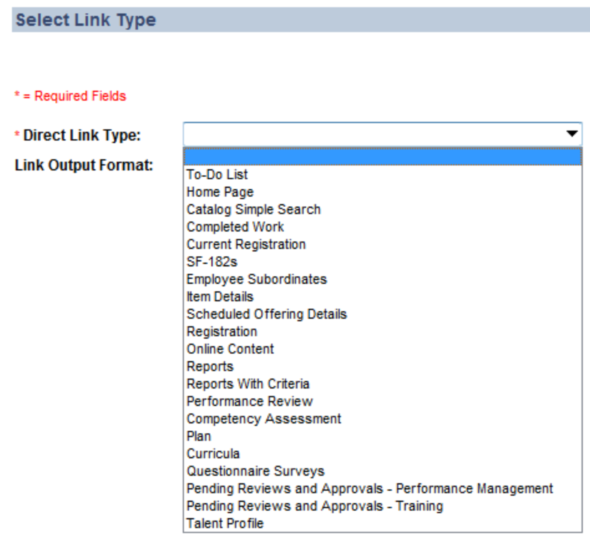
Using the Direct Link Wizard to Create a URL Direct Link (1411)

Step	Activity	View
1.	Select the **System Admin** menu.	
2.	Expand the **Tools** menu.	

3. Select **Direct Link**.



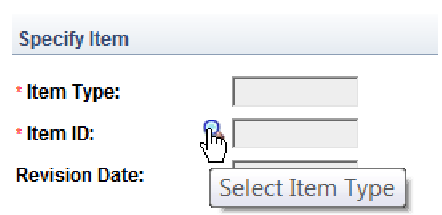
4. Pull down the menu and select the **Direct Link Type (**for example, Item Details).



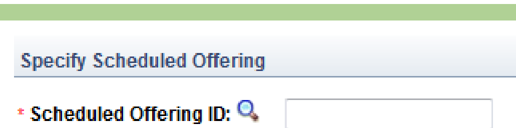
5. Choose **URL** as the **Link Output Format**.

6. Depending on the link type chosen in Step 4, AgLearn may prompt you for additional information.

For **Item Details** or **Online Content Structure**, click the **Search** icon next to **Item ID** to search for the item. The Item Type and Revision Date fields will populate automatically after selecting the item.

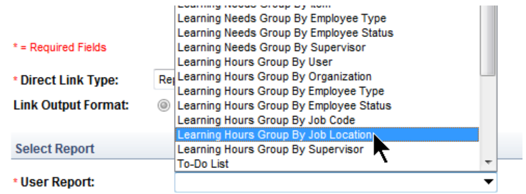


7. For **Scheduled Offerings** or **Registrations**, click the **Search** icon to search for the **Scheduled Offering ID**. You may also type it in directly if you know it.



8. For **Reports** or **Reports with Criteria**, enter the report you wish to have run.

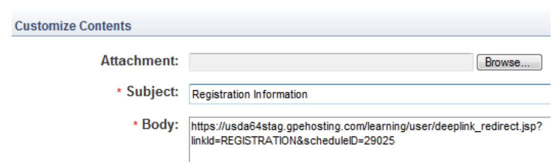
If choosing **Reports with Criteria**, you will have a chance to specify the criteria after you have chosen which report to run.



9. Click **Display Link**.

10. Copy the link.

11. Paste the link into any e-mail, including those sent as ad hoc notifications.



Managing Scheduled Offerings (1411)

The item creation process also establishes the default settings for any scheduled offerings for that item. Therefore, the quickest and easiest way to create a scheduled offering is to go to the item record and create the offering there. The system will alert you to any scheduling conflicts so you can make the necessary adjustments.

Subtasks pertaining to Scheduled Offerings are accessible via the Learning menu. Scheduled Offering-specific subtasks include the following: **View**, **Add**, **Edit**, **Copy**, **Cancel**, and **Close.**

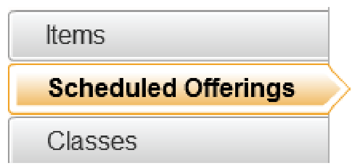
Searching For and Viewing a Scheduled Offering Record (6.4)

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

Creating bookmarks for scheduled offerings you expect to use frequently will allow you to avoid this process altogether.

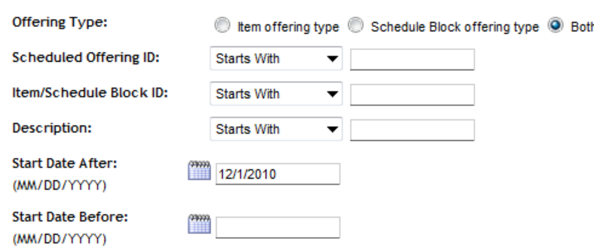
1. Select the **Learning** button.

2. Select **Scheduled Offerings**.



Scheduled offering searches default to looking for offerings in the future. To look for an offering that has already taken place, edit the **Start Date After** field.

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

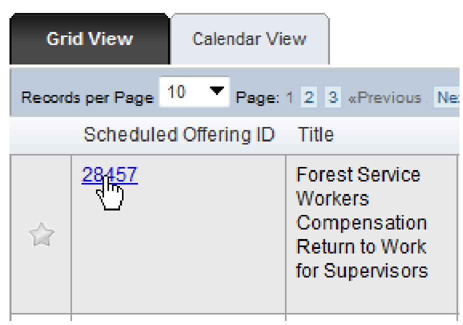


4. Click **Search**.

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

5. In the **Grid View**, locate the desired scheduled offering and click its link to open.

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



Searching For and Viewing a Scheduled Offering Record (6.4)

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

6. Make any changes or gather any information you need from the scheduled offering record.

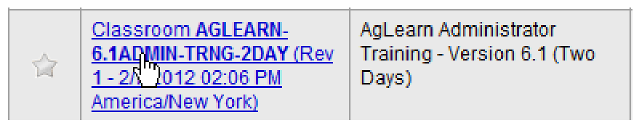
Remember to click **Save** before leaving any screen where you made changes.

Add a New Scheduled Offering Record (1411)

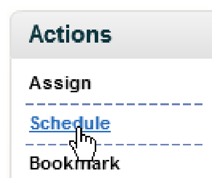
Step | **Activity** | **View**

An item must have a classification of **Instructor-Led** or **Blended** in order for it to be schedulable.

1. Search for and open the item for which you wish to create a scheduled offering.



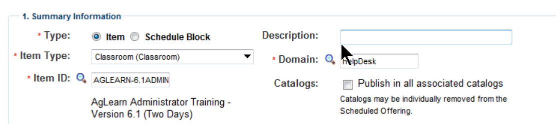
2. Click the **Schedule** link in the Actions area.



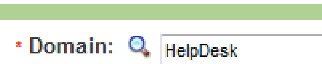
The description need be no more than a reminder of the date, as AgLearn does not prominently display dates in the scheduled offering record.

3. AgLearn has already populated the **Item Type** and **Item ID**.

Enter a brief **Description**.

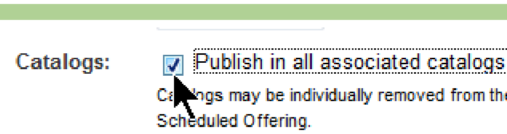


4. The scheduled offering inherits its **Domain ID** from the parent item. Be sure it is not PUBLIC.



You may remove scheduled offerings from catalogs, but cannot add them to catalogs where the item is not present.

5. Check the **Catalogs** box if the scheduled offering should be included in the same catalogs as the item.

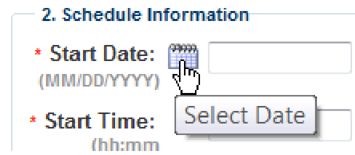


Add a New Scheduled Offering Record (1411)

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

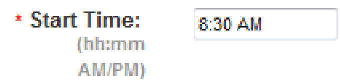
Instructions on using the Calendar icon are in the section titled, "Selecting and Entering a Date Via the Calendar Icon."

6. Click the Calendar icon to select a **Start Date**.

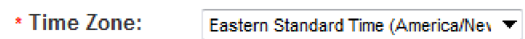


Be careful of the format. Use a colon (:) to separate hours and minutes, then a space, then AM or PM in capital letters.

7. Enter a **Start Time**.



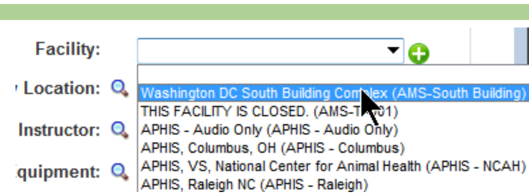
8. Click the **Time Zone** drop-down list to search for and enter the correct time zone.



9. Click **Preview** to see the dates and times on which the offering will take place.

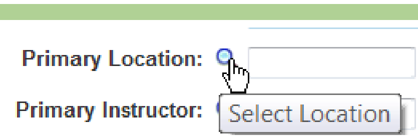
Facilities are a mess in AgLearn; the drop-down list is seemingly endless and not well sorted. With rare exceptions you'll be better off to settle for specifying the location; the searches are much easier.

10. From the **Facility** drop-down list, select the facility where the scheduled offering will take place.



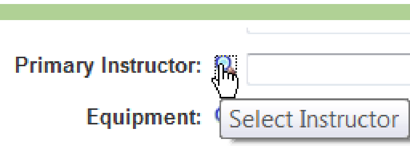
Selecting a location is optional. No agencies are using AgLearn for venue scheduling at this time.

11. Search for and select a **Primary Location.**



Selecting instructors is optional. Most agencies have their own methods for tracking instructors' schedules.

12. Click the **Search** icon to see a list of instructors authorized to teach this item.

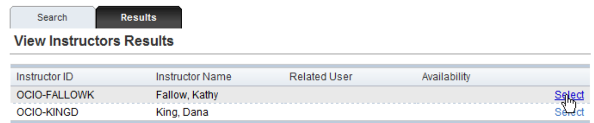


Add a New Scheduled Offering Record (1411)

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

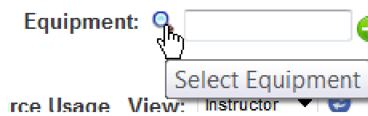
13. Click **Select** to schedule the desired instructor.

If the instructor you wish to use does not appear, click the Search tab and search for them as you would for any other record.

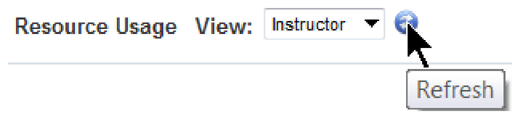


Most agencies do not assign equipment through AgLearn.

14. Click the **Search** icon to find Equipment you may need to assign.

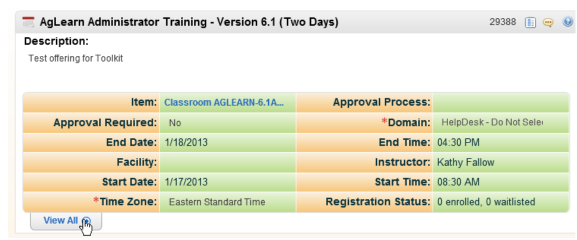


15. Check for scheduling conflicts by selecting the resource in question from the Resource Usage drop-down, then clicking the **Refresh** icon.



16. Click **Save**.

17. AgLearn takes you to the scheduled offering's record. From here, click **View All** to make changes to maximum and minimum registration amounts, turn self-registration on or off, alter the registration cut-off date, provide contact information, etc.



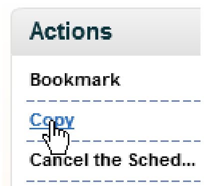
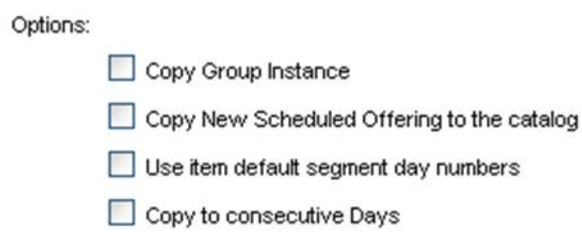
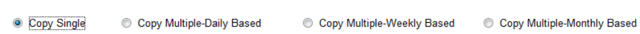
Creating a bookmark eliminates the need to remember or write down the system-generated Scheduled Offering ID numbers.

18. If this is a scheduled offering you'll need to come back to, click **Bookmark** in the Actions area to create a bookmark.

Copy a Scheduled Offering Record (1411)

See “Performing a Search” for tips on how to search for a scheduled offering.

Copying scheduled offerings, especially more than once, can be tricky. Always perform a dry run in Staging to make sure the results you get are what you wanted, as offerings created in error can prove difficult to remove.

Step	Activity	View
1.	Open the record of the scheduled offering you wish to copy by searching for it, using its **Bookmark**, or finding it on your **Recents** list.	
2.	Click **Copy** in the Actions area.	
3.	Select the check box(es) corresponding to the element(s) of the existing record that should remain the same.	
4.	Select how many times to copy the offering. There are four options: **Copy Single** creates one copy. **Copy Multiple – Daily Based** creates as many copies as you want, spaced as many days apart as you want. **Copy Multiple – Weekly Based** creates as many copies as you want, spaced as many weeks apart as you want. **Copy Multiple – Monthly Based** creates as many copies as you want, spaced as many months apart as you want. **Note**: Menus to allow you to make selections based on your chosen criterion will appear when you make your selection.	

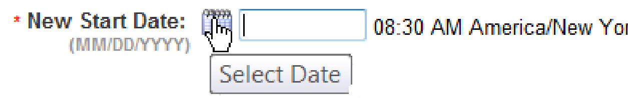
Copy a Scheduled Offering Record (1411)

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

The demonstrated example assumes we are making only a single copy.

5. Click the **Calendar** icon to select a **New Start Date**.

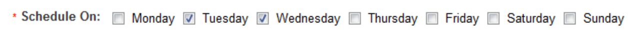
Note: The default **Start Time** will be the same as the item you are copying. You may change this after creating the copy.



Always copy your scheduled offerings in Staging first to avoid errors that may prove difficult to undo in Production.

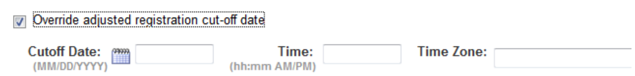
6. Select the days of the week on which the new offering is to take place.

It's a good idea to note the day or days of the week when choosing the start date in Step 6, as choosing incorrectly can cause your new offering to take place over a wide range of time.



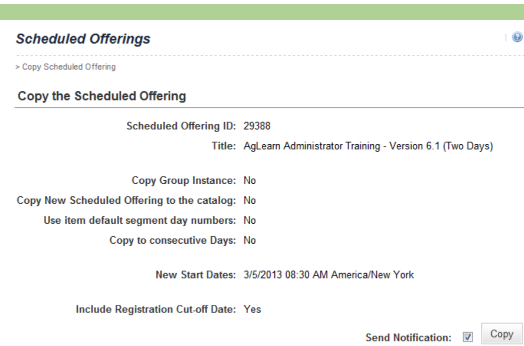
7. If the original Scheduled Offering had a registration cut-off date, the new offering will cut off registrations the same number of days before the offering.

If you change this date, remember to specify a new **Cutoff Date** and **Time**, as well as **Time Zone.**



8. Click **Next**.

9. AgLearn presents a confirmation screen. Check the **Send Notification** box to send emails to anyone who affected by the changes to this scheduled offering.

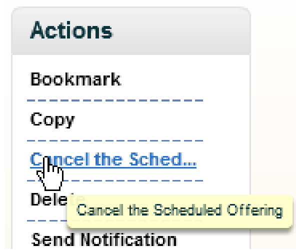
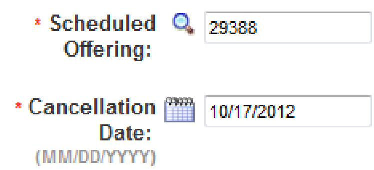
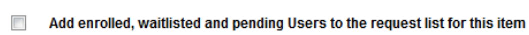
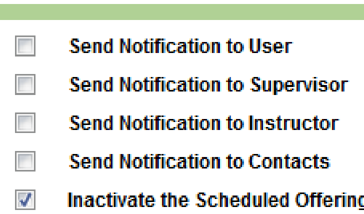


10. Click **Copy.**

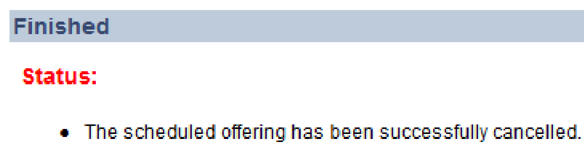
Tip: To avoid data formatting errors, use the **Calendar** icon assistant.

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

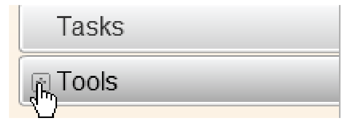
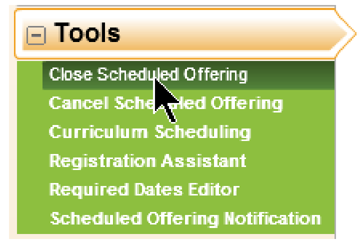
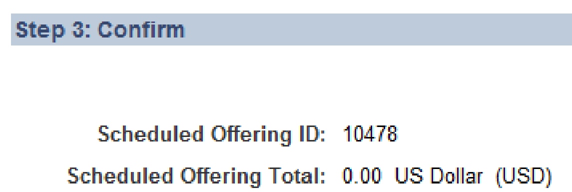
Cancel a Scheduled Offering (1411)

Note	Step	Activity	View
See "Performing a Search" for tips on how to search for a scheduled offering.	**1.**	Open the record of the scheduled offering you wish to cancel by searching for it, using its Bookmark, or finding it on your Recent list.	
	2.	Click **Cancel the Scheduled Offering** in the Actions area.	
The default date for the cancellation is the current date. You cannot cancel a scheduled offering once its start date has arrived.	**3.**	Verify the **Scheduled Offering** and **Cancellation Date**. Modify either as necessary.	
	4.	Click **Next**.	
Costs are beyond the scope of this toolkit. Team AgLearn knows of no agency that uses them.	**5.**	Click **Next** to skip the **Edit Realized Costs** screen.	
This step is a good idea if you plan to offer another offering for the same item in the future.	**6.**	Select the **Add enrolled, waitlisted and pending Users to the request list for this item** check box if it is applicable to this Scheduled Offering.	
Inactivating the scheduled offering is also a good idea to avoid confusion.	**7.**	Select the **Send Notification to User**, **Supervisor**, **Instructor**, or **Others**, and **Inactivate the Scheduled Offering** check boxes if applicable.	
	8.	Click Next.	

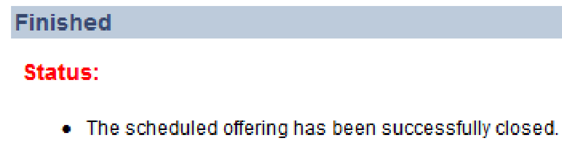
Cancel a Scheduled Offering (1411)

Step	Activity	View
9.	Review the summary of cancellation changes.	
10.	Click **Finish**.	
11.	On the **Finished** screen, review the scheduled offering's status.	

Close a Scheduled Offering (1411)

	Step	Activity	View
Closing a Scheduled Offering is primarily an accounting function. (Think “closing the books.”) It is rarely, if ever, used.	**1.**	Select the **Learning** button.	
	2.	Open the **Tools** drop-down.	
	3.	Select **Close Scheduled Offering.** (It will probably be the default.)	
You may click the Search icon if you do not know the Scheduled Offering ID.	**4.**	Enter the **Scheduled Offering ID.**	
	5.	Enter the **Closing Date**, either by using the Calendar icon, or by typing it yourself.	
	6.	Click **Next.**	
	7.	Click **Next**. **Note**: This toolkit does not address costs.	
There is no way to undo closing a scheduled offering. Be sure you have the right one before finishing.	**8.**	Confirm you are closing the proper scheduled offering.	
	9.	Click **Finish**. **Note**: Closing a Scheduled Offering removes it from the calendar.	

Close a Scheduled Offering (1411)

Step	Activity	View
10.	On the **Finished** screen, review the Scheduled Offering's status.	

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

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

Managing Segments (1411)

A segment is a unit of division of a scheduled offering that allows information to flow from an item record to all associated offerings. For example, if an item is set up to have three segments on consecutive days, all the administrator creating an offering needs to do is to tell AgLearn the start date; AgLearn will know which other days to fill in.

Segments can also facilitate the scheduling of locations, facilities, and instructors, though Team AgLearn knows of no agencies that use it for that, with the possible exception of a few who may be using it to track instructors' schedules.

Segment-specific subtasks include the following: **View**, **Add**, **Edit a Scheduled Offering Segment**, **Copy Resources to Other Scheduled Offering Segments**, **Copy a Scheduled Offering's Daily Segments,** and **Delete a Scheduled Offering Segment**.

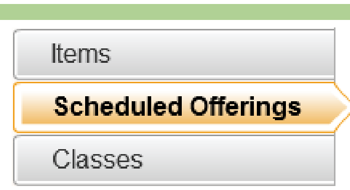
Search for and Edit a Scheduled Offering Segment (6.4)

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

Bookmarking the scheduled offering removes the need to search for it.

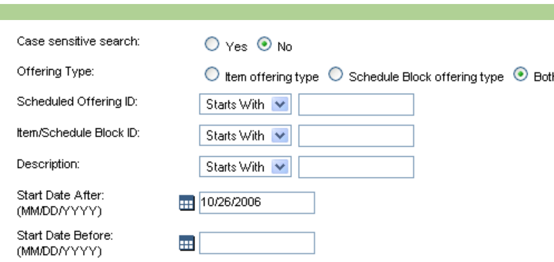
1. Select the **Learning** button.

2. Select the **Scheduled Offerings** tab.

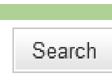


See "Performing a Search" for tips on how to search for a scheduled offering.

3. Enter search criteria for the scheduled offering.

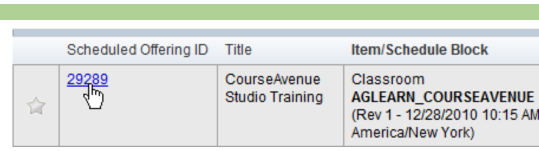


4. Click **Search**.

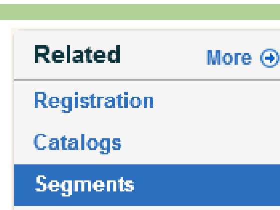


Use Ctrl+F to quickly find a Scheduled Offering on the screen.

5. Locate the desired Scheduled Offering and click the link for its ID.



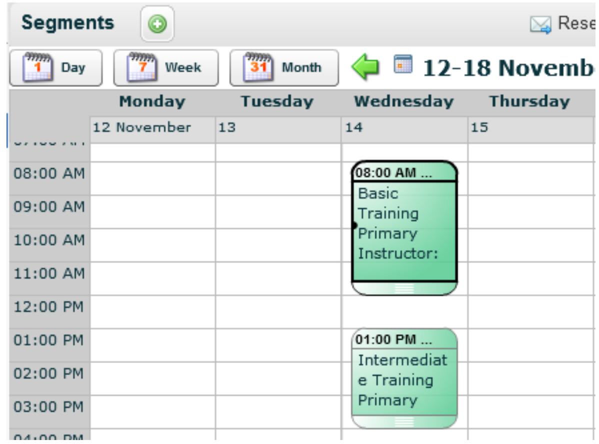
6. Click the **Segments** tab.



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

7. Locate the desired segment. Double-clicking on the segment will open the record to show more detail and allow you to make edits.

Note: You can also edit segments while viewing the scheduled offering in List View. To switch to List View, click the List View icon next to the Related Help icon.



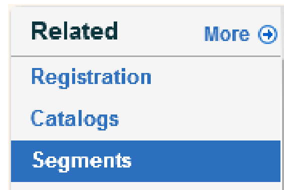
Add a Scheduled Offering Segment (1411)

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

Bookmarking the scheduled offering removes the need to search for it.

1. Locate the scheduled offering in which you wish to add a segment.

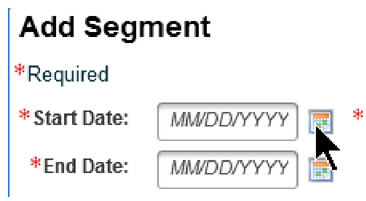
2. Click the **Segments** tab.



Any changes made to a segment in a scheduled offering will apply to that offering alone. If you wish to add segments to all future offerings for an item, edit the item record.

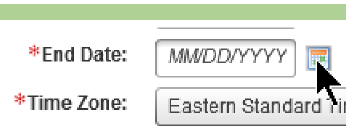
3. Click the **Add New Segments** icon.

4. Double-click the **Start Date** calendar icon to select and enter a start date.

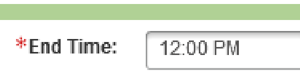


5. Enter a segment start time in the **Start Time** field.

6. Double-click the **End Date** calendar icon to select and enter an end date.



7. Enter a segment end time in the **End Time** field.

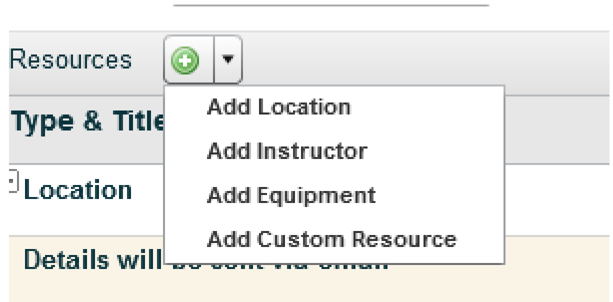
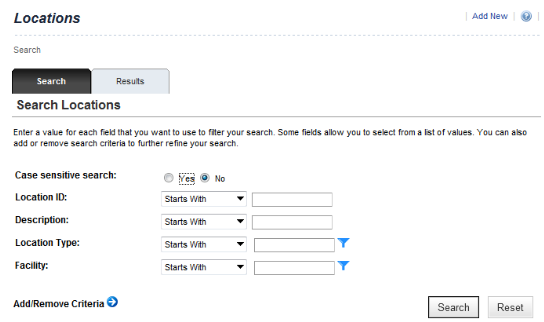
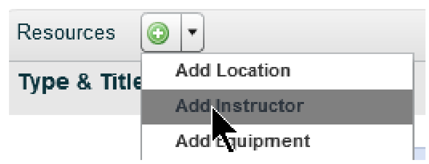
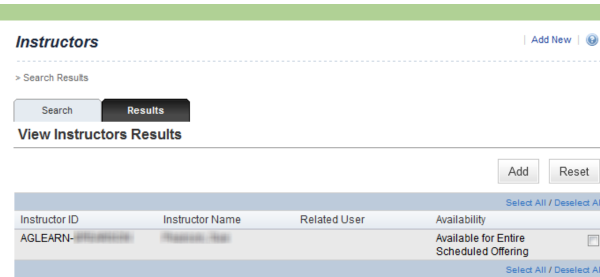


The Time Zone field defaults to the time zone in which the Scheduled Offering occurs.

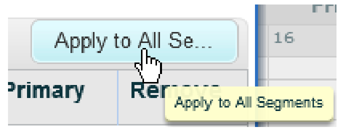
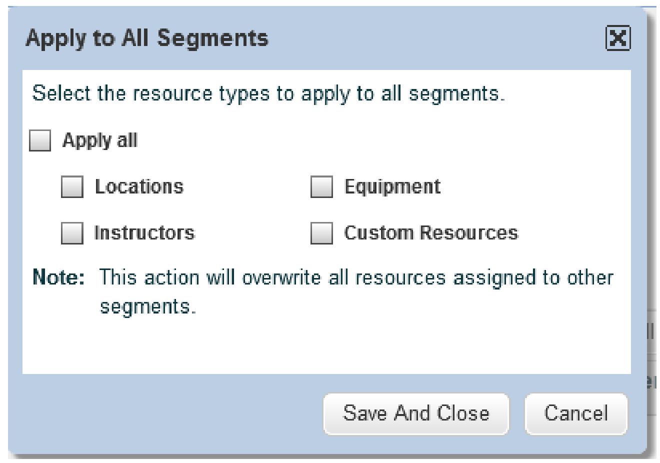
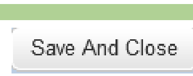
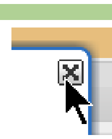
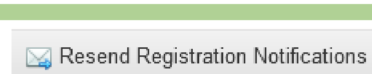
8. Click the **Time Zone** drop-down list to search for and select a time zone.

9. Enter a brief **Description**.

Add a Scheduled Offering Segment (1411)

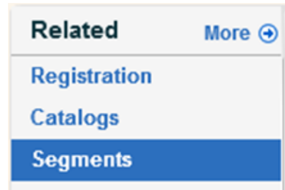
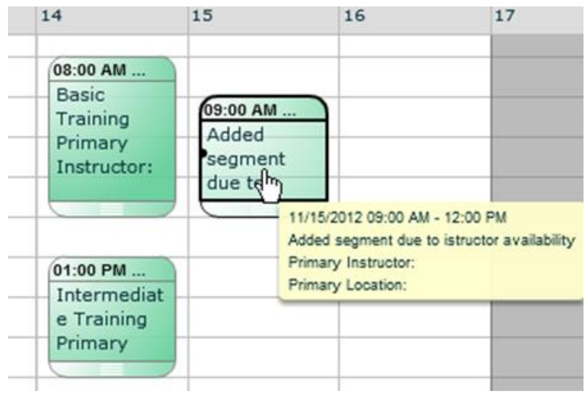
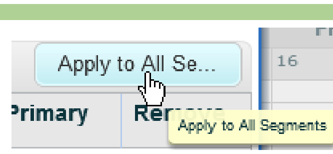
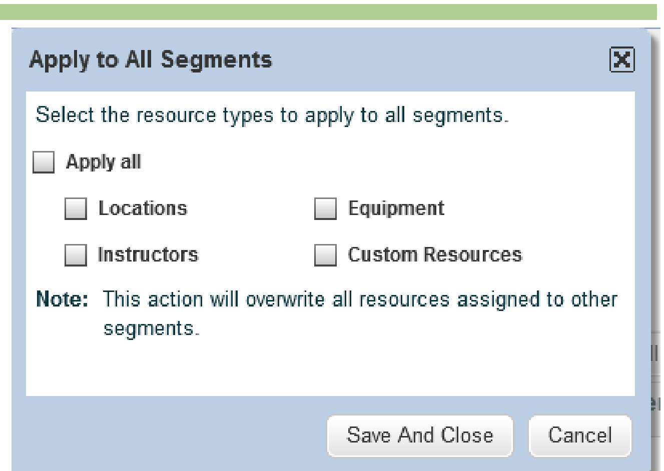
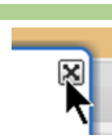
Step	Activity	View
10.	Click the **Resources** drop-down and select **Add Location** to choose a location for the segment.	
11.	Search for and choose the location as you would anything else.	
12.	Click the **Resources** drop-down and select **Add Instructor** to choose a location for the segment.	
13.	Only instructors authorized to teach this item will appear. Check the **Add** box and click the **Add** button to select one. If you wish to search for a different instructor, click the **Search** tab and search as you would for anything else.	
14.	If the changes made in Steps 10 – 13 apply only to this segment, click **Save and Close** and skip to Step 19. If you like these changes to apply to all segments for this scheduled offering, click **Save** and continue to Step 15.	

Add a Scheduled Offering Segment (1411)

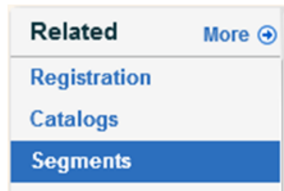
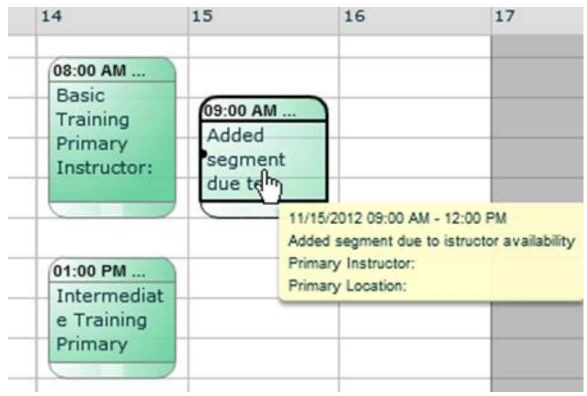
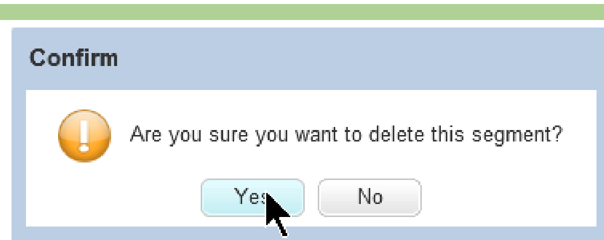
Step	Activity	View
15.	If applying the changes made in Steps 10 – 13 to all segments of this offering, click **Apply To All Segments.**	
16.	@@Select which of the resource changes you want to apply to all segments. **Note**: This will overwrite the existing resources for those segments.	
17.	Click **Save and Close**.	
18.	Click **X** in the upper right corner to close the pop-up.	
19.	Select **Resend Registration Notification** to notify students and instructors of the changes.	

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

Copy Resources to Other Scheduled Offering Segments (1411)

Step	Activity	View
1.	Locate the desired scheduled offering and click the **Scheduled Offering ID**.	
2.	Click the **Segments** tab.	
3.	Double-click the segment you wish to copy.	
4.	Select **Apply to All Segments**.	
5.	Select each check box corresponding to the individual resources to copy. **Note**: Select the **Apply All** check box to copy all Segment resources to the other Segments in this Scheduled Offering.	
6.	Click **X** in the upper right corner to close the pop-up.	

Delete a Scheduled Offering Segment (1411)

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Locate the desired Scheduled Offering and click the Scheduled Offering ID.</td><td>
</td></tr>
<tr><td>2.</td><td>Click the Segments tab.</td><td>
</td></tr>
<tr><td>3.</td><td>Double-click the segment you wish to delete.</td><td>
</td></tr>
<tr><td>4.</td><td>Click Delete at the lower right of the pop-up.</td><td>
</td></tr>
<tr><td>5.</td><td>Confirm the deletion.</td><td>
</td></tr>
</table>

Be sure you are deleting the correct segment before clicking Yes. AgLearn is not like Microsoft Word; there is no Undo button.

Managing Requests (1411)

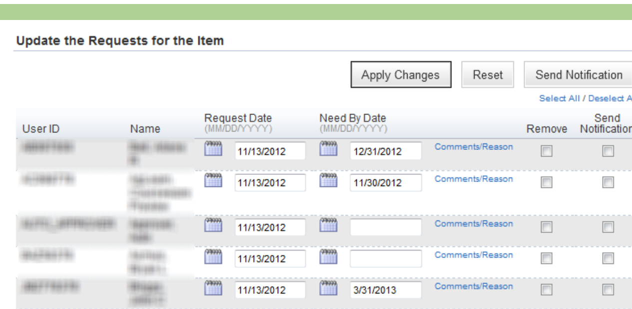
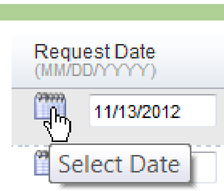
A Request is how an AgLearn administrator becomes aware a user wants or needs to complete a specific item. Users most often create requests because no offering is scheduled, or the user's schedule cannot accommodate the available offerings. A request does not place a user in active registration or on the waitlist for any specific scheduled offering, but places him or her in position for an administrator to quickly and easily complete a registration when an offering becomes available.

The **Item Requests Report** allows administrators to see all pending requests.

Subtasks pertaining to **Managing Requests** are accessible from the **Learning** menu. Request-specific subtasks include the following: **View**, **Add**, and **Edit a User Item Request**.

Search For and Edit User Item Requests (1411)

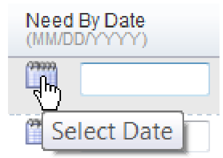
For information on how to search for items, see the section of this document titled, "Managing Data Entry and Searches."

Step	Activity	View
1.	Open the record of the item for which you want to view requests.	
2.	In the **Related** area, click **More**.	
3.	Click **Requests** in the pop-up window.	
4.	Scroll down to the section labeled **Update the Requests for this Item.**	
5.	Click a user's **Request Date** calendar icon to change the existing request date.	

Steps 5 – 8 describe all of the available edits for a request. Use only what you need.

Need By requests are just that: requests. They are not guarantees of accommodation.

6. Click a User's **Need By Date** calendar icon to enter/change the date by which the training must be complete, if possible.



This is a good place for information needed to determine priorities when space is limited.

7. Select the **Comments/Reason** link to edit or enter a comment or reason regarding the request.

8. Select the **Remove** check box next to each request you wish to remove.

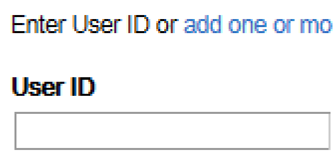
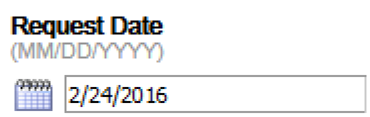
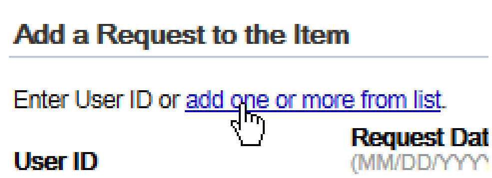
9. Click **Apply Changes**.

Add a User Item Request (1411)

For information on how to search for items, see the section of this document titled, “Managing Data Entry and Searches.”

Step	Activity	View
1.	Open the record of the item for which you want to add requests.	
2.	In the **Related** area, click **More**.	
3.	Click **Requests** in the pop-up window.	

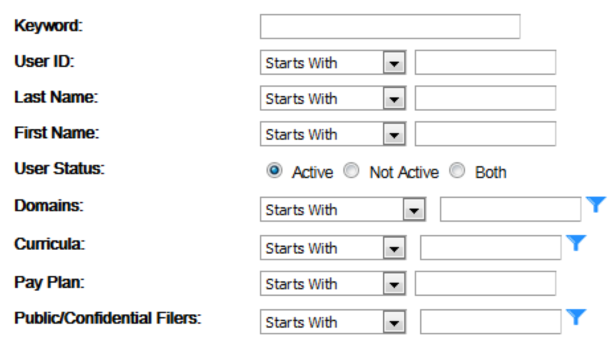
Take a look at both methods as described in Steps 4 – 16 before deciding whether it will be more work to add them as a group, or one at a time.

Step	Activity	View
4.	If adding only a single request, proceed to Step 5. To add multiple requests at once, skip to Step 9.	
5.	Edit the **Request Date**, if you received the request earlier so you can sort them in the order submitted in case that becomes important later.	
6.	Enter the **Need By Date** requested by the user.	
7.	Enter the **Request Reasons** submitted by the user and any **Comments** you may have.	
8.	Click **Add**.	
9.	To add requests from multiple users at once, click the add one or more from list link.	

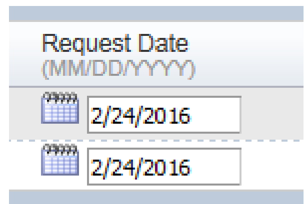
Add a User Item Request (1411)

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

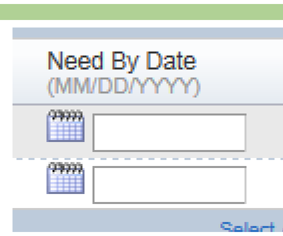
10. Search as you would for users in any other setting. Beware: if you select some of your users you must complete the process before searching again or the original search results will be lost.



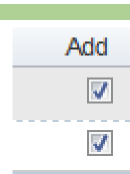
11. Edit the **Request Dates**, if you received the request earlier so you can sort them in the order submitted in case that becomes important later.



12. Enter the **Need By Dates** requested by the user.



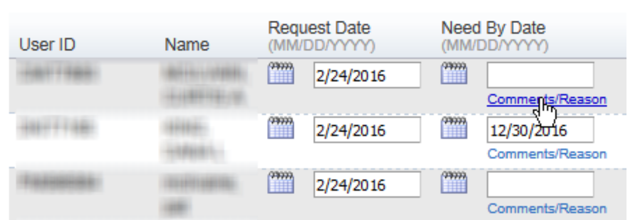
13. Check the **Add** boxes for all user to be included in the added requests.



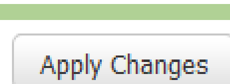
14. Click **Add**.

15. Select the <u>**Comments/Reason**</u> link to add request reasons and any comments, as needed.

This is why we suggested you read all of the instructions back in Step 4. Since you'll have to add the reasons one at a time after selecting multiple users, you might be just as well off to do them one at a time.



16. Click **Apply Changes** if you made any.



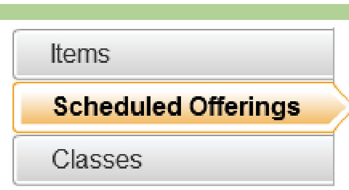
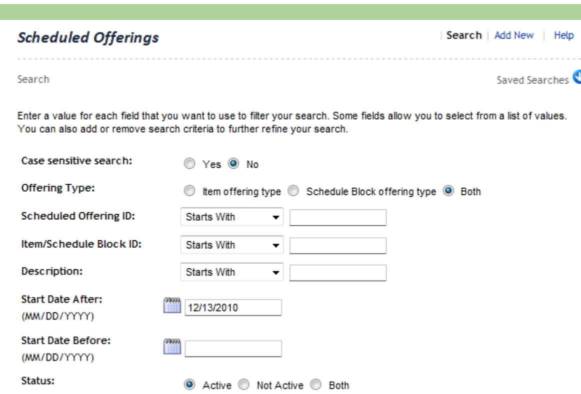
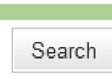
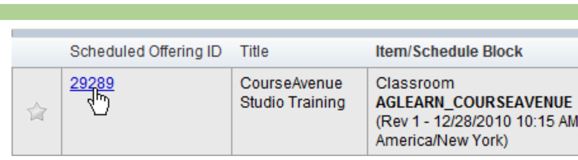
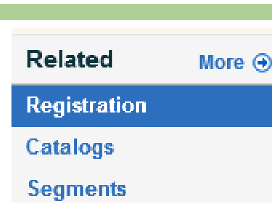
Note: AgLearn can also generate requests on its own. When cancelling a scheduled offering, AgLearn will ask the administrator if it should generate requests for registered or waitlisted users. Another such automated circumstance occurs when a scheduled offering takes place with users on a waitlist. AgLearn will generate requests for each user on the waitlist via the Waitlist to Request automatic process.

Managing Slots (1411)

Slots are reservations made by organizations for enrollments in scheduled offerings. There are no user names associated with the slots—they may not be known yet--but the slots reserve seats for that organization until specific users are identified. Slots are in the **Registration** area within **Scheduled Offerings**. Slot-specific subtasks include the following: **View**, **Add**, **Edit**, **Delete**, and **Fill a Slot**.

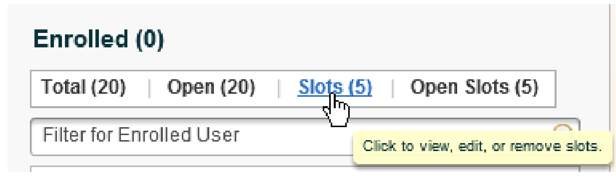
View Scheduled Offering Slots (1411)

You can skip the search process if you bookmarked the scheduled offering. Also, remember to check your Recent list to see if the offering appears there.

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

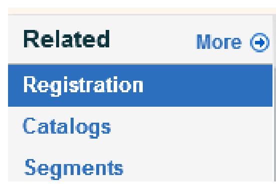
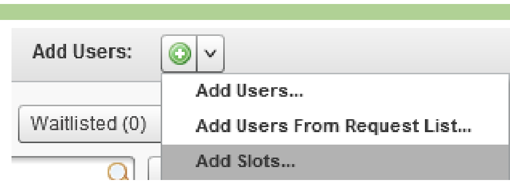
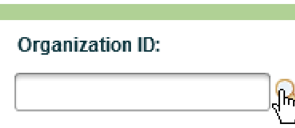
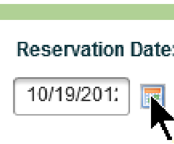
7. View the number of **Slots** and **Open Slots**.

8. To see details on the slots, click the **Slots** link.



Add Slots to a Scheduled Offering (1411)

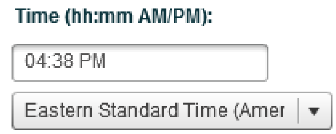
This is easy if you have bookmarked the offering, or if it appears on your Recent list. If not, search for it as you would anything else.

Step	Activity	View
1.	Open the scheduled offering to which you want to add slots.	
2.	In the **Related** section, click **Registration**.	
3.	Click **Add Slots** from the **Add Users** drop-down.	
4.	Click the **Organization ID** search icon to search for the Organization ID that will reserve Slots.	
5.	Indicate the number of **Slots** to be reserved, either by typing in a number, or using the up and down arrows.	
6.	Click the **Reservation Date** calendar icon to select and enter a reservation date. Note: The **Reservation Date** field defaults to the current date.	

The description of the organization often matches the description of the domain.

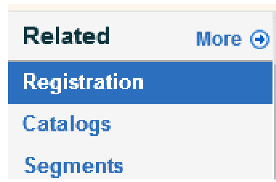
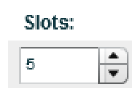
Add Slots to a Scheduled Offering (1411)

Slot reservations are rarely this time-sensitive.

Step	Activity	View
7.	Change the reservation time and time zone, if necessary. **Note**: The **Reservation Time** and **Time Zone** default to the current time and zone.	
8.	Click **Save**.	
9.	Verify the proper number of slots appears.	

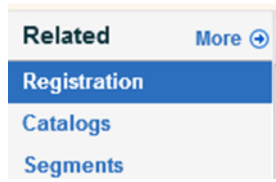
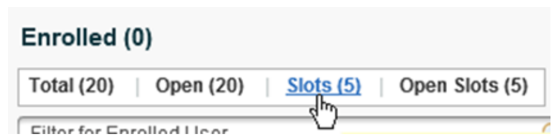
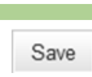
Check your bookmarks and Recent list to see if you can skip this step altogether.

Edit Scheduled Offering Slots (1411)

Step	Activity	View
1.	Search for and open the scheduled offering containing the slots you wish to edit.	
2.	In the **Related** section, click **Registration**.	
3.	Click the **Slots** link.	
4.	Make the necessary changes, either by deleting and re-typing the appropriate number, or by clicking the up or down arrows.	
5.	Click **Save.**	

Check your bookmarks and Recent list to see if you can skip this step altogether.

Delete Scheduled Offering Slots (1411)

Step	Activity	View
1.	Search for and open the scheduled offering containing the slots you wish to delete.	
2.	In the **Related** section, click **Registration**.	
3.	Click the **Slots** link.	
4.	Check the **Remove** box.	
5.	Click **Save.**	

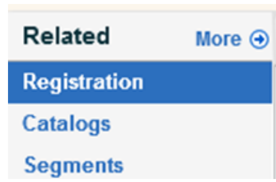
Check your bookmarks and Recent list to see if you can skip this step altogether.

Fill a Slot (1411)

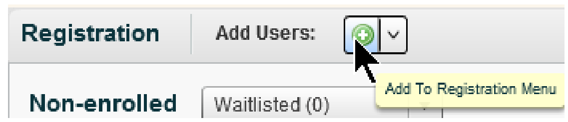
Step | **Activity** | **View**

1. Search for and open the scheduled offering into which you wish to enroll the user.

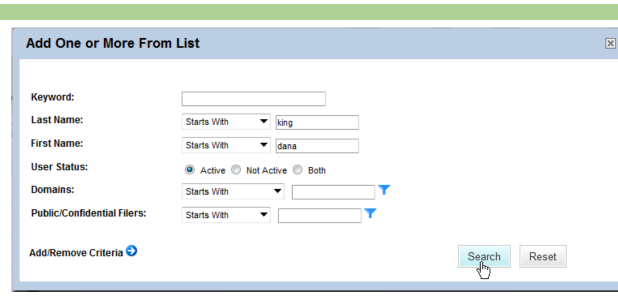
2. In the **Related** section, click **Registration**.



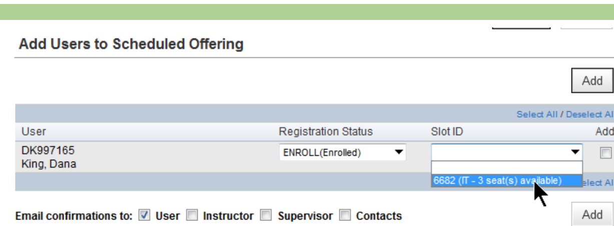
3. Click the **Add Users** button.



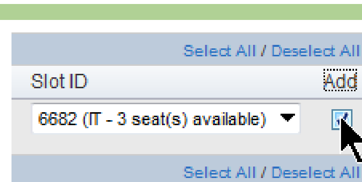
4. Search for the user you wish to enroll into the slot.



5. Select the slot or slots to use from the **Slot ID** drop-down list for that user or users.

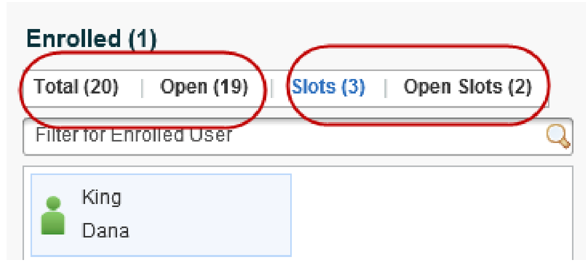


6. Check the **Add** box for each user you are enrolling.



7. Click **Add**.

Fill a Slot (1411)

Step	Activity	View
8.	Verify the user has been enrolled, and in the proper slot.	

Managing Scheduled Offering Registrations (1411)

Registration is the act of placing a user's name on the planned list of participants in a specific scheduled offering. Registration-specific subtasks include the following: **View a Scheduled Offering Registration**, **Register a User in a Scheduled Offering**, **Edit Registered Users in a Scheduled Offering**, **Withdraw a User from a Scheduled Offering**, and **Create a Scheduled Offering Roster Report**,

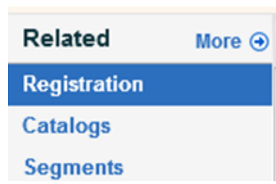
View a Scheduled Offering Registration (6.4)

Check your bookmarks and Recent list to see if you can skip this step altogether.

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

1. Search for and open the scheduled offering into which you wish to enroll the user.

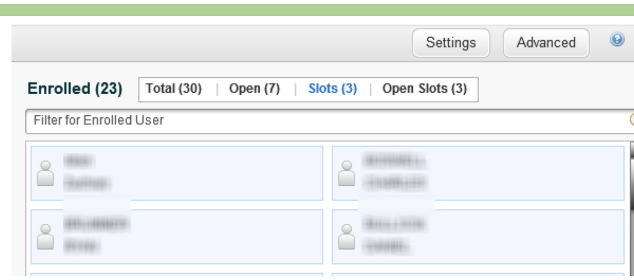
2. Click the **Registration** tab.



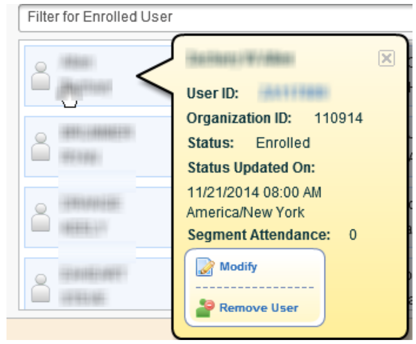
3. Look in the Enrolled area to see:

- Total enrollments allowed for the offering.
- Open seats.
- The number of reserved slots.
- Open slots.

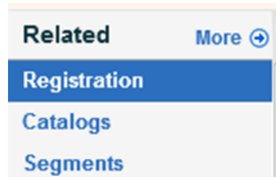
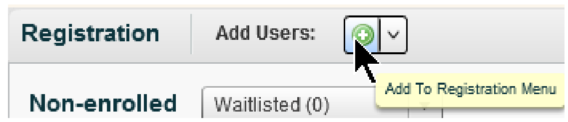
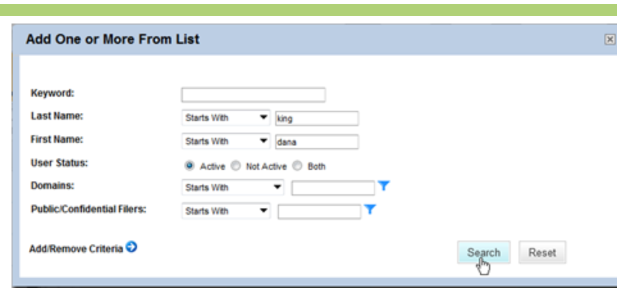
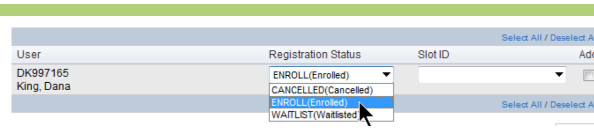
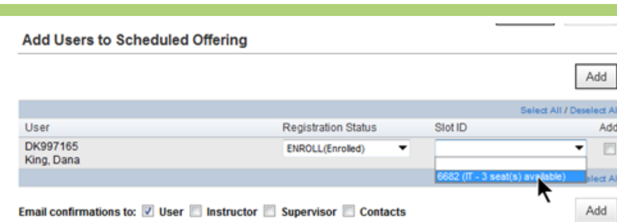
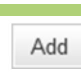
Each user also has a panel with an icon so their registration status is easy to change.



View a Scheduled Offering Registration (6.4)

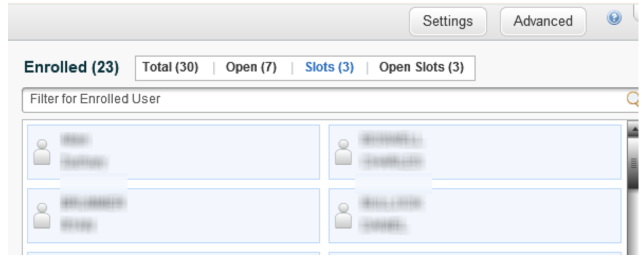
Step	Activity	View
4.	For more detail on a user's enrollment, hover your mouse over their name. The pop-up balloon will allow you to go directly to the user's record, modify the enrollment, or remove the user from the offering.	

Register a User in a Scheduled Offering (1411)

	Step	Activity	View
Check your bookmarks and Recent list to see if you can skip this step altogether.	1.	Search for and open the scheduled offering into which you wish to enroll the user.	
	2.	Click the **Registration** tab.	
	3.	Click the **Add Users** icon.	
	4.	Search for the user or users to enroll.	
	5.	Use the **Registration Status** drop-down list to select a Registration Status.	
Slots were addressed in a previous section.	6.	Use the **Slot ID** drop-down list to assign the new user to a previously reserved slot, if appropriate.	
	7.	Check the **Add** box for each user to enroll.	
	8.	Click **Add**.	

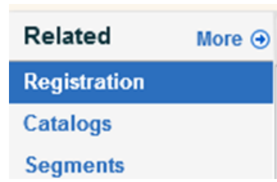
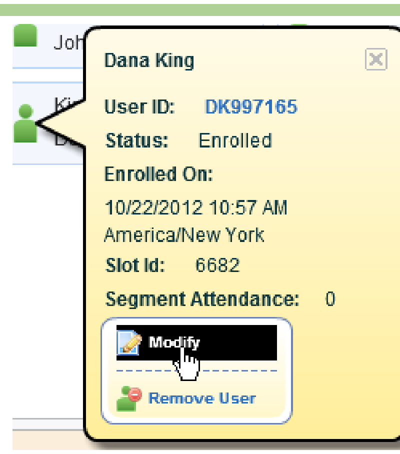
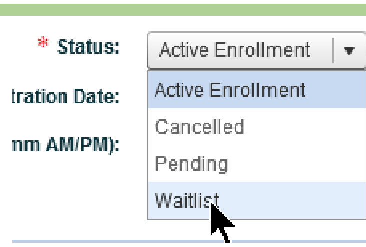
Remember, the number of open slots (Open Slots) must be subtracted from the number of open seats (Open) for an accurate count of how many students can still be enrolled.

Register a User in a Scheduled Offering (1411)

Step	Activity	View
9.	Verify the new user(s) appears, and that the **Total, Open, Slots**, and **Open Slots** numbers are correct. Total – The maximum number of students in the scheduled offering. Open – The number of available seats, including slots. Slots – The number of seats reserved for specific organizations. Open Slots – The number of slots remaining.	

Creating a bookmark or consulting your Recent list can save having to perform a search.

Edit Registered Users in a Scheduled Offering (1411)

Step	Activity	View
1.	Search for and open the scheduled offering into which you wish to enroll the user.	
2.	Click the **Registration** tab.	
3.	Hover your mouse over the name of the user whose enrollment status is to be changed.	
4.	Click **Modify**.	
5.	Select the new **Status** from the drop-down.	
6.	Click **Save**.	

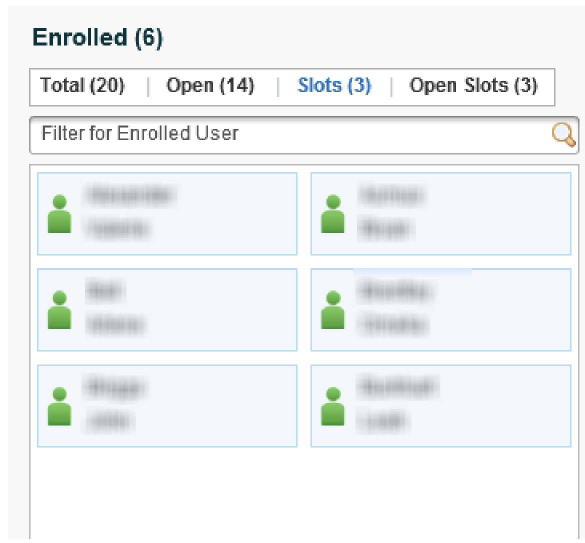
Edit Registered Users in a Scheduled Offering (1411)

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

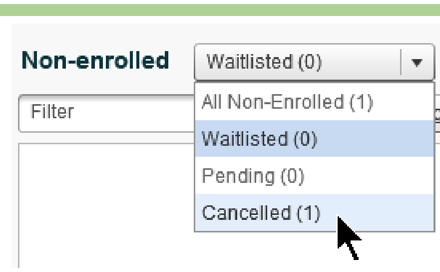
Refunds do not apply to any scheduled offerings at this time. You may enter a comment here if you wish.

7. If you selected "Cancelled," click **Save;** otherwise skip this step.

8. The user's name no longer appears in the **Enrolled** area.

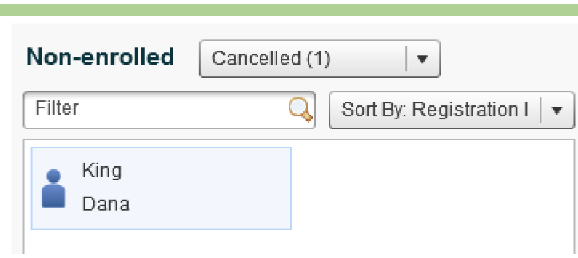


9. Select the **Non-enrolled** drop-down option matching the user's new registration status.



You can also change the registration status by dragging the user's name from Enrolled to Non-enrolled, or vice versa. Remember, when changing a user's status by dragging and dropping, the new registration status must appear in the Non-enrolled area **before** dragging the name over.

10. The user will appear.



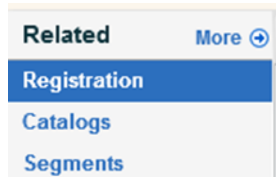
Withdraw a User from a Scheduled Offering (1411)

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

Creating a bookmark or consulting your Recent list can save having to perform a search.

1. Search for and open the scheduled offering into which you wish to enroll the user.

2. Click the **Registration** tab.

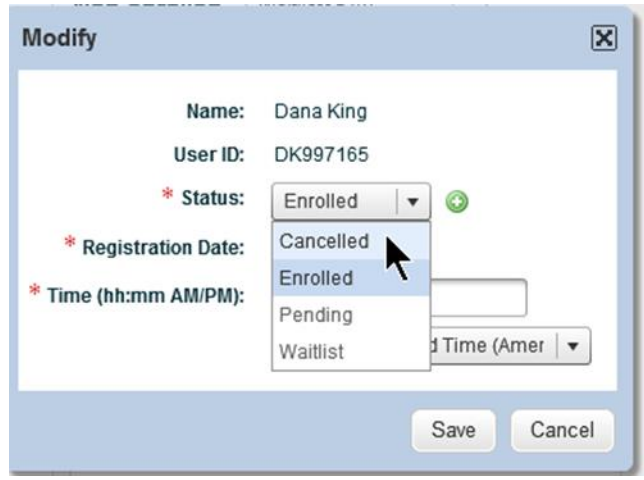
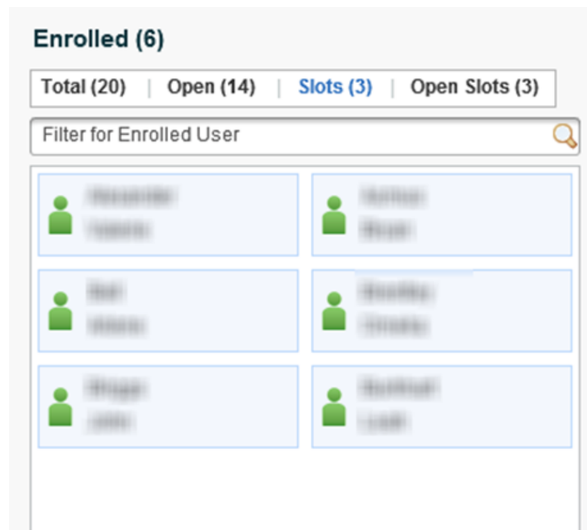
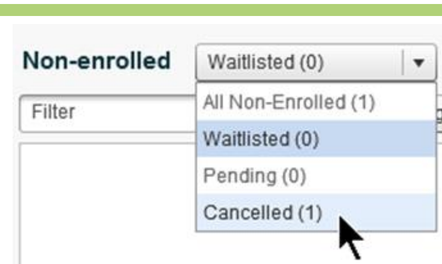


3. Hover your mouse over the name of the user who is to be withdrawn.

It is almost always preferable to cancel an enrollment than to remove the user from the roster altogether, as the cancellation may be come relevant at some future time. Only remove a user when the registration is an error.

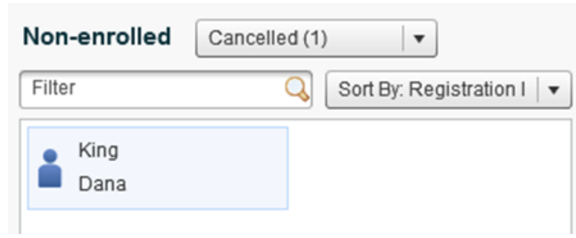
4. Click **Modify**.

Withdraw a User from a Scheduled Offering (1411)

Step	Activity	View
5.	Select Cancelled from the **Status** drop-down.	
6.	Click **Save**.	
7.	The user's name no longer appears in the **Enrolled** area.	
8.	In the **Non-enrolled** drop-down select Cancelled.	

A user can also be withdrawn by dragging their name from Enrolled to Non-enrolled. Remember, when removing a user by dragging and dropping, Cancelled must be the status in the Non-enrolled area **before** dragging the name over.

Withdraw a User from a Scheduled Offering (1411)

Step	Activity	View
9.	The user will appear.	

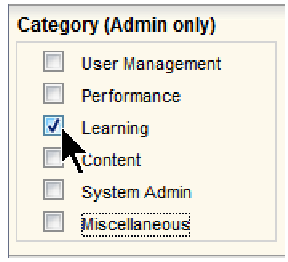
Create a Scheduled Offering Roster Report (1411)

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

There are two other roster-related reports. The Custom Roster two report provides AgLearn ID, name, email, Domain and Status. The custom Class Roster 2 report provides AgLearn ID, name, domain, and a space for comments. Both are custom reports found in the Miscellaneous category.

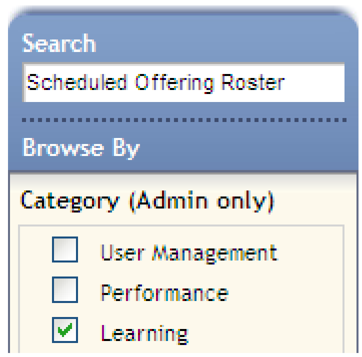
1. Select the **Reports** button from the top menu.

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

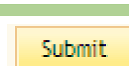


The Scheduled Offering Roster report the offering ID, date(s), start and end times, instructor, and location, as well as user names, IDs, and supervisors. The Scheduled Offering Roster by Last Name report sorts the enrolled users by last name, which is a great convenience when using the report as a sign-in sheet.

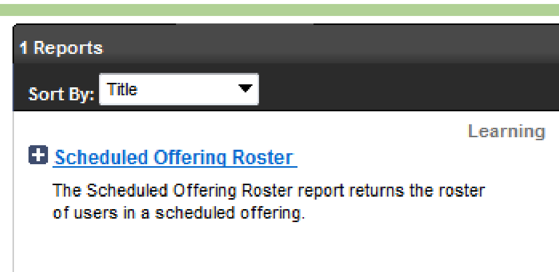
3. Enter the title of the report in the **Search** field.



4. Click **Submit**



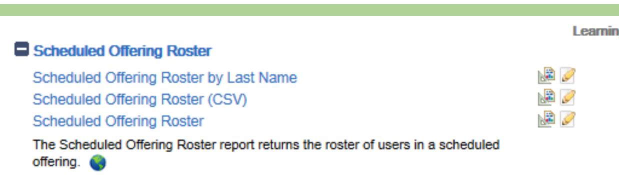
5. Click the **+** icon to expand the report group.



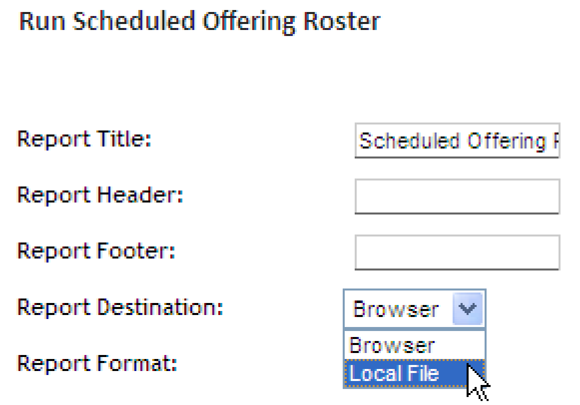
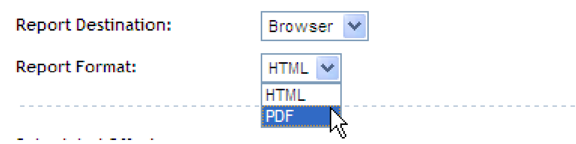
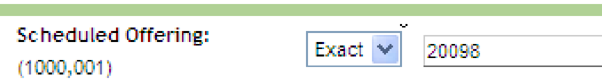
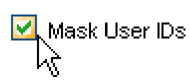
Choosing CSV will allow you to edit the report's output. This is sometimes useful if you need to add spaces for on-site enrollments, or wish to sort the list in a different order.

6. Select the report you wish to run.

Note: The first report selection provides HTML or PDF output. The second selection provides CSV output only.



Create a Scheduled Offering Roster Report (1411)

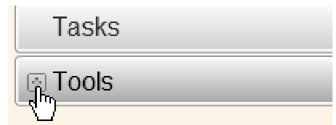
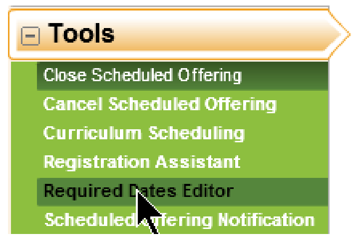
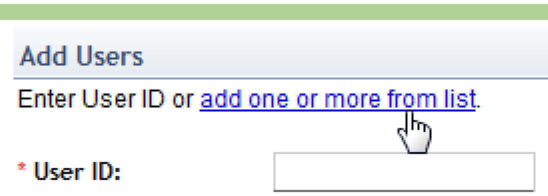
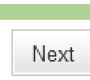
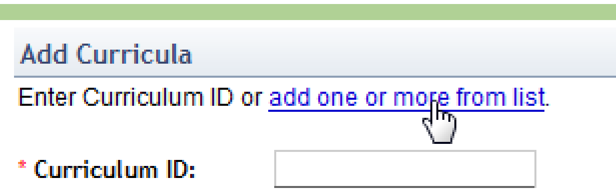
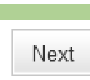
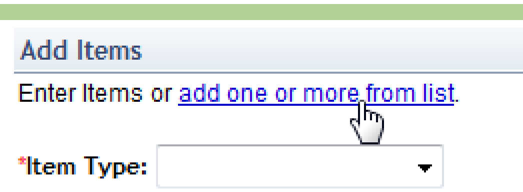
Step	Activity	View
7.	Select either the **Browser** or **Local File** option for your report destination. **Note**: **Browser** is the default selection; when selected, it displays the report within the browser. Selecting **Local File** saves the report to your hard drive where you may open it at your convenience.	
8.	Select the **HTML** or **PDF** Report Format. Enter the Scheduled Offering number **Note**: The default format is HTML.	
9.	Enter the **Scheduled Offering ID**.	
10.	Indicate if you wish to **Mask User IDs**. **Note**: The default setting is mask user IDs. A series of asterisks will appear in the User ID field.	
11.	Click **Run Report**.	

If you do not know the Scheduled Offering ID, you can click the Filter icon at the right of the box and search for it as you would for anything else.

User IDs are not PII, but it's a courtesy to mask them unless you're running a CSV report and need them for another action.

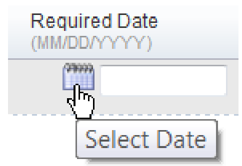
You can click **Schedule Job** to specify a date and time to run the report as a background job or to click **Reset** to revert to system default.

Editing a “Required By” Date by Using the Required Dates Editor (1411)

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

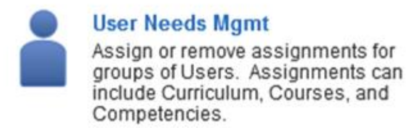
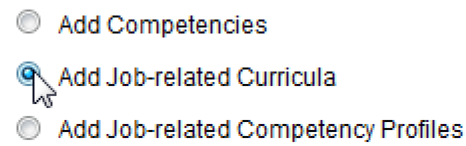
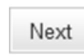
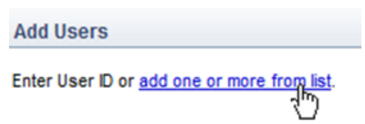
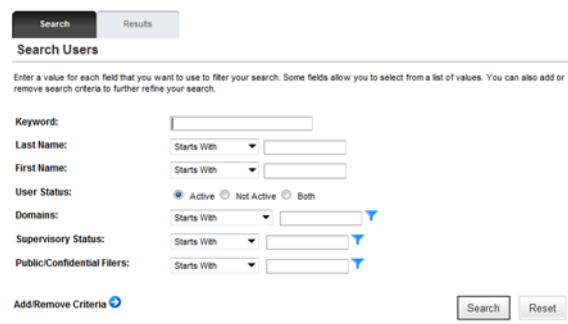
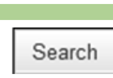
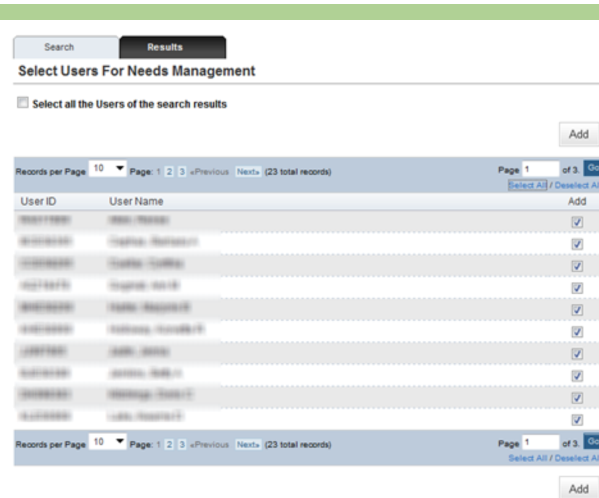
If you have no curricula requiring date changes, skip to Step 7.

Editing a “Required By” Date by Using the Required Dates Editor (1411)

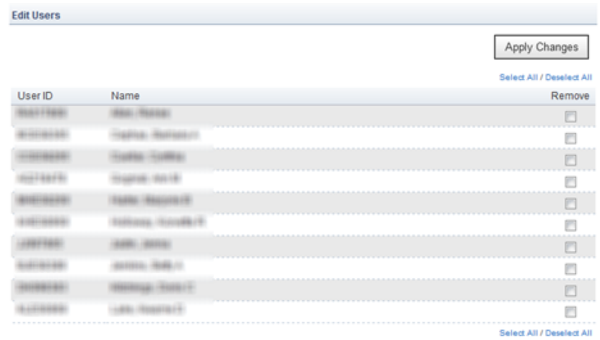
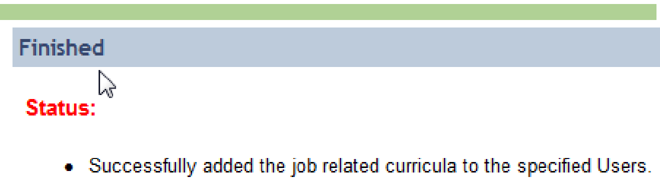
Step	Activity	View
9.	When the list is complete, click **Next**.	
10.	In the **Required Date** text box, edit the required dates for the selected Items to indicate the new required date for each Item.	
11.	Click **Finish**.	

Multiple selections will show multiple lines so all items and curricula chosen need not have the same new Required Date.

Add Job-related Curricula to User Record(s) with the UNM Wizard (1411)

	Step	Activity	View
	1.	Select **User Needs Mgmt** on your home page.	
	2.	Select the **Add Job-related Curricula** option button.	
	3.	Click **Next** to move to Step 2.	
Red asterisks designate required fields.	**4.**	Select the **Add one or more from list** link to search for and enter Users into the UNM Wizard.	
	5.	On the **> Search** screen, enter the appropriate search criteria. **Note**: See **Managing Data Entry and Searches** for more detailed information on searching.	
	6.	Click **Search**.	
The **Select all the Users of the search results** check box is unreliable. Do not use it.	**7.**	On the **Results** screen select the corresponding **Add** check box for each User add. **Note:** Clicking the Select All link will only select the users visible on the current screen. To select all names returned in the search, open the Records per Page drop-down and select All, then Select All after the expanded list displays.	

Add Job-related Curricula to User Record(s) with the UNM Wizard (1411)

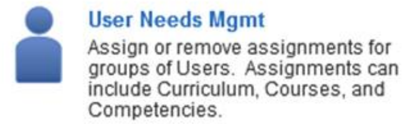
Step	Activity	View
8.	Click **Add**.	
9.	Review the Users in the **Edit Users** section. **Tip**: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.	
10.	Click **Next** to move to Step 3.	
11.	Click **Run Job Now** to have AgLearn complete the assignment of job-related curricula to the listed User record(s). **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
12.	Review the Status message on the **Finished** screen.	

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

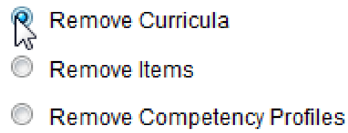
Remove Curricula from User Record(s) with the UNM Wizard (1411)

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

1. Select **User Needs Mgmt**.



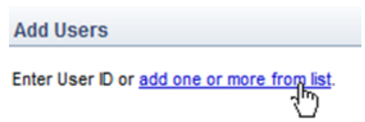
2. Click the **Remove Curricula** option button.



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

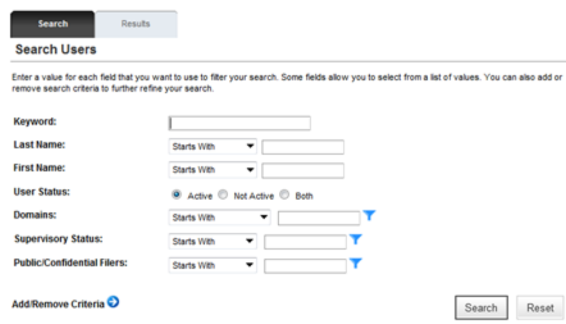
Remember, when your process is to remove things, the Add button adds things to the list of what to remove.

4. Select the **add one or more from list** link to search for and enter Users into the UNM Wizard.

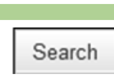


5. On the **> Search** screen, enter the appropriate search criteria.

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



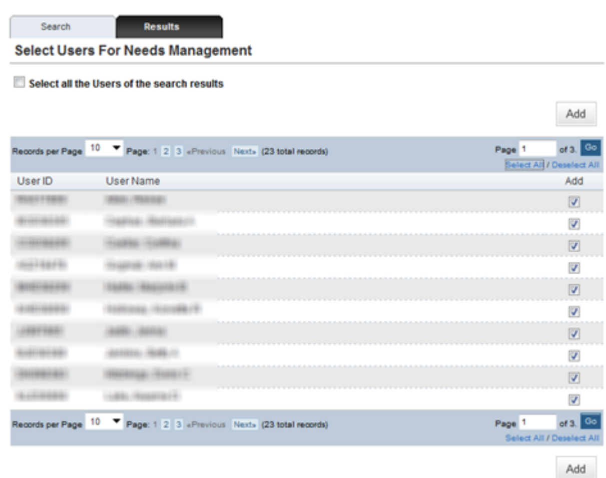
6. Click **Search**.



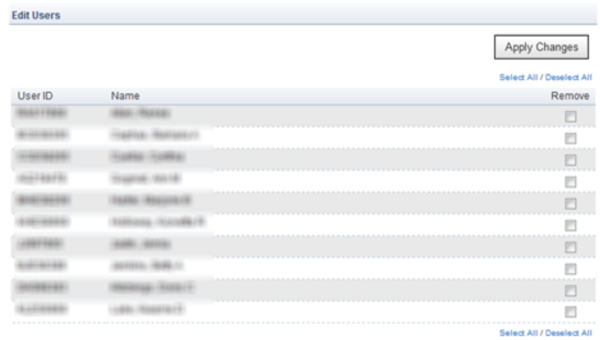
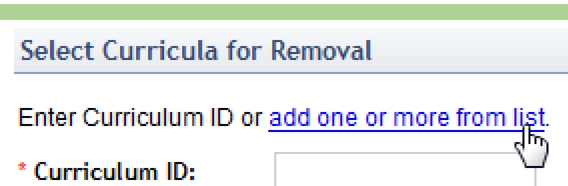
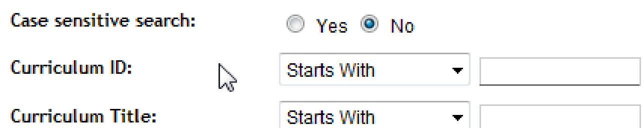
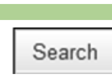
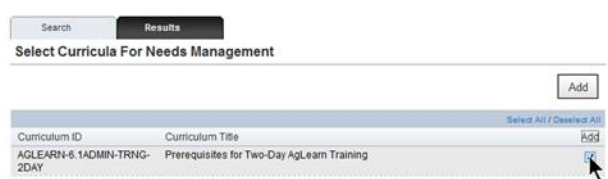
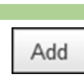
The **Select all the Users of the search results** check box is unreliable. Do not use it.

7. Locate the User(s) on the **Results** tab. Select the corresponding **Add** check box for each User to add.

Note: Clicking the Select All link will only select the users visible on the current screen. To select all names returned in the search, open the Records per Page drop-down and select All, then Select All after the expanded list displays.



Remove Curricula from User Record(s) with the UNM Wizard (1411)

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

Remember, you are building a list of curricula for removal.

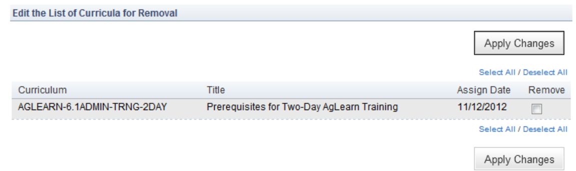
Remove Curricula from User Record(s) with the UNM Wizard (1411)

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

This is where you can make corrections if you included a curriculum in error.

16. Review the curricula in the **Edit the List of Curricula for Removal** section.

Tip: To remove a Curriculum from the **List of Curricula for Removal**, select the corresponding **Remove** check box.

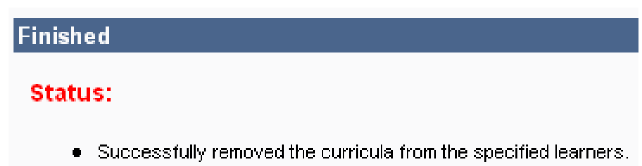


Schedule jobs that will affect over 2000 records to run after hours.

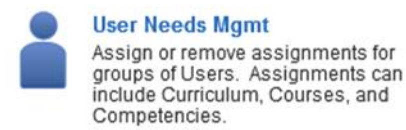
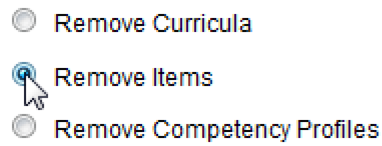
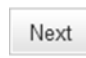
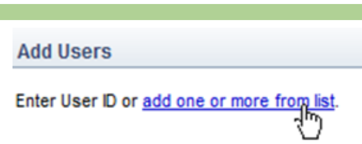
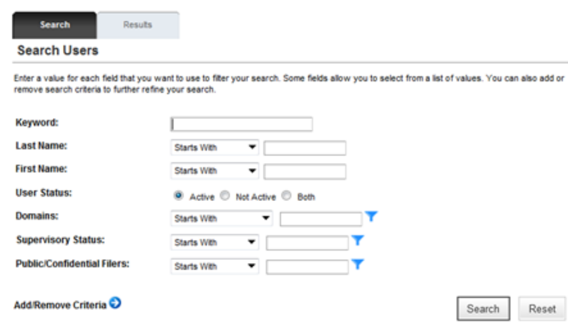
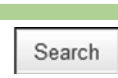
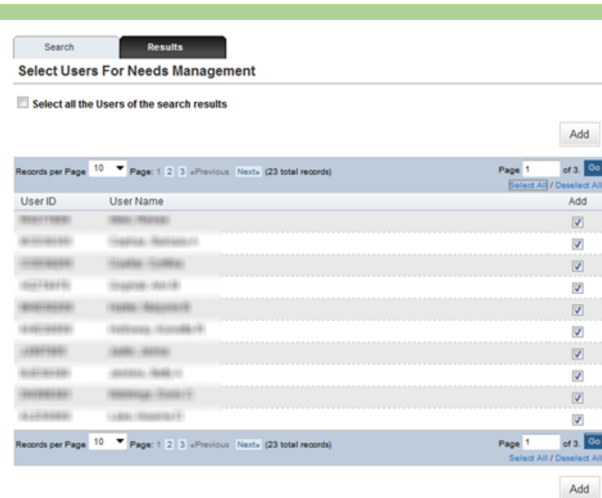
17. Click **Run Job Now** to have AgLearn complete the un-assignment to User record(s).

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

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



Removing Items from User Record(s) with the UNM Wizard (1411)

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Select User Needs Mgmt.</td><td>
</td></tr>
<tr><td>2.</td><td>Click the Remove Items option button.</td><td>
</td></tr>
<tr><td>3.</td><td>Click Next to move to Step 2.</td><td>
</td></tr>
<tr><td>4.</td><td>Select the Add one or more from list link to search for and enter Users into the UNM Wizard.</td><td>
</td></tr>
<tr><td>5.</td><td>On the > Search screen, enter the appropriate search criteria.
Note: See Managing Data Entry and Searches for more detailed information on searching.</td><td>
</td></tr>
<tr><td>6.</td><td>Click Search.</td><td>
</td></tr>
<tr><td>7.</td><td>On the Results screen select the corresponding Add check box for each User to add.
Note: Clicking the Select All link will only select the users visible on the current screen. To select all names returned in the search, open the Records per Page drop-down and select All, then Select All after the expanded list displays.</td><td>
</td></tr>
</table>

The **Select all the Users of the search results** check box is unreliable. Do not use it.

Removing Items from User Record(s) with the UNM Wizard (1411)

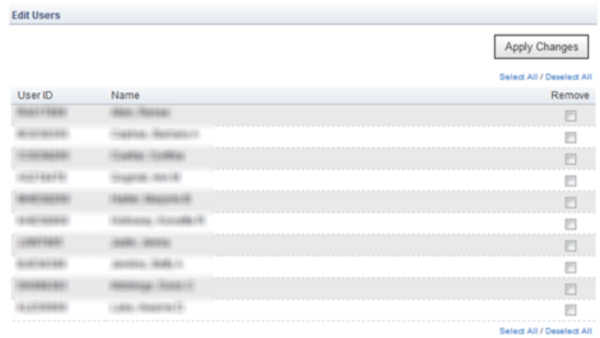
Step	Activity	View

Remember, when your process is to remove things, the Add button adds things to the list of what to remove.

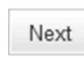
8. Click **Add**.

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

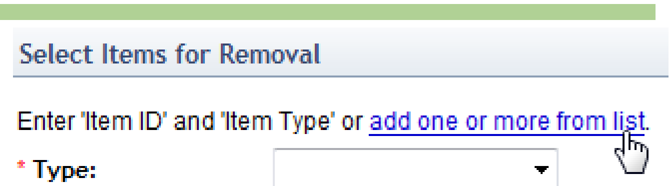
Tip: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.



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

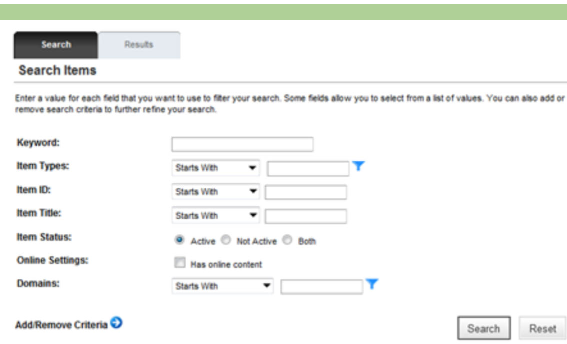


11. Select the **Add one or more from list** link to search for and enter items into the list of items for removal.

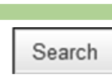


12. On the **> Search** screen, enter the appropriate search criteria.

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



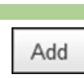
13. Click **Search**.



Remember, you are building a list of Items for removal.

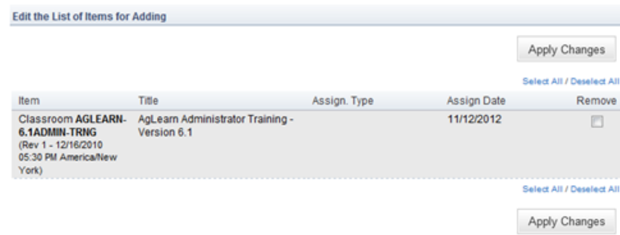
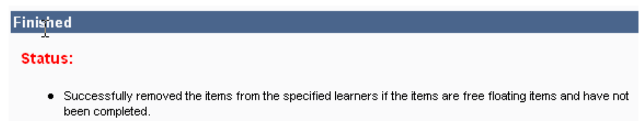
14. On the **Results** tab select the corresponding **Add** check box for each Item to add to the list of Items for removal.

15. Click **Add**.



Removing Items from User Record(s) with the UNM Wizard (1411)

This is your chance to make amends if you mistakenly added an item to the list.

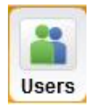
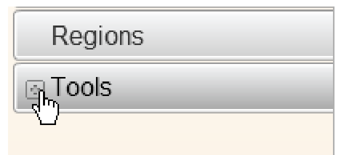
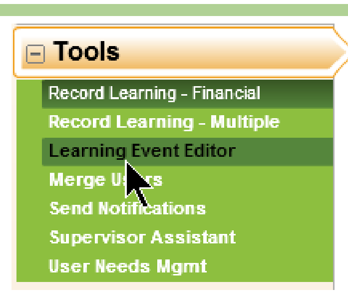
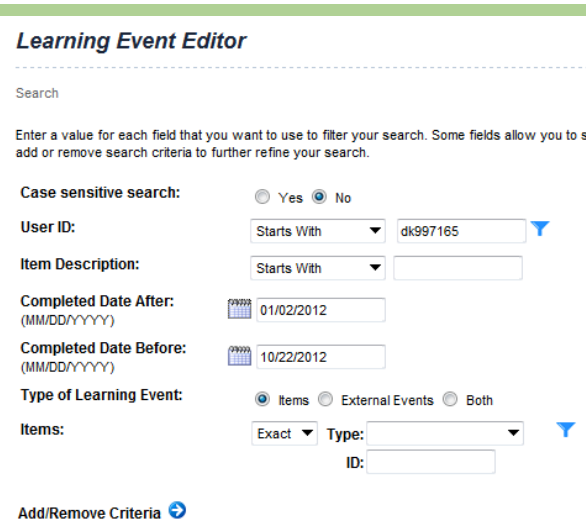
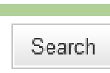
Step	Activity	View
16.	Review the items in the **Edit the List of Items for Removal** section. **Tip**: To remove an Item from the **List of Items for Removal**, select the corresponding **Remove** check box.	
17.	Click **Run Job Now** to have AgLearn complete the un-assignment to User record(s). **Note**: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.	
18.	Review the Status message(s) on the **Finished** screen.	

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

Managing Learning Events (1411)

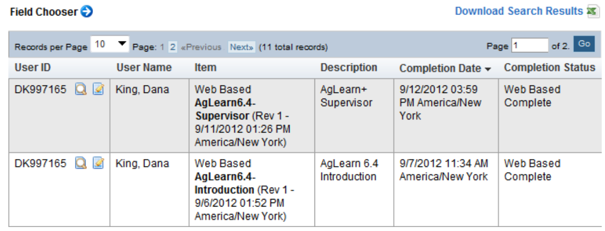
A learning event refers to a User's completion of an Item, or attempt at completion. User-specific subtasks include the following: **View**, **Edit**, and **Delete a Learning Event**, and **Record a Learning Event for an Item**, **an External Event**, and a **Scheduled Offering**.

Edit a Learning Event (6.4)

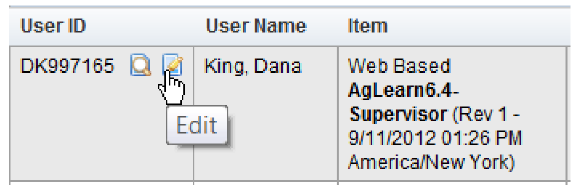
Step	Activity	View
1.	Click the **Users** button.	
2.	Open **Tools** from the left menu.	
3.	Select **Learning Event Editor**.	
4.	On the **> Search** screen, enter the search criteria.	
5.	Click **Search**.	

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

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



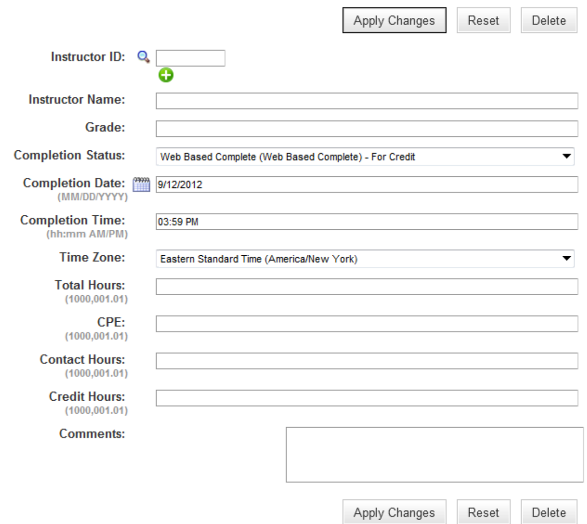
7. Click the **Edit** icon for the event you wish to edit.



Any comments entered here will become part of the event's permanent record and available to anyone with access to the record. Use discretion.

8. Make what changes are necessary on the Summary page.

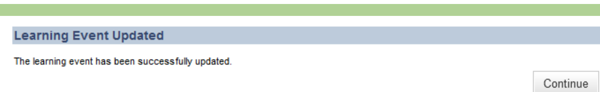
Note: AgLearn is not currently tracking data contained in the Financial, User Costs, or Government Reporting tabs.



9. Click **Apply Changes**.

10. A confirmation screen appears.

Click **Continue** to finish.



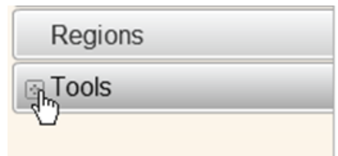
Why would any delete a learning event? Even AgLearn administrators make mistakes. As these steps show, it’s better to be careful. There is no way to delete completions in bulk.

Delete a Learning Event (1411)

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

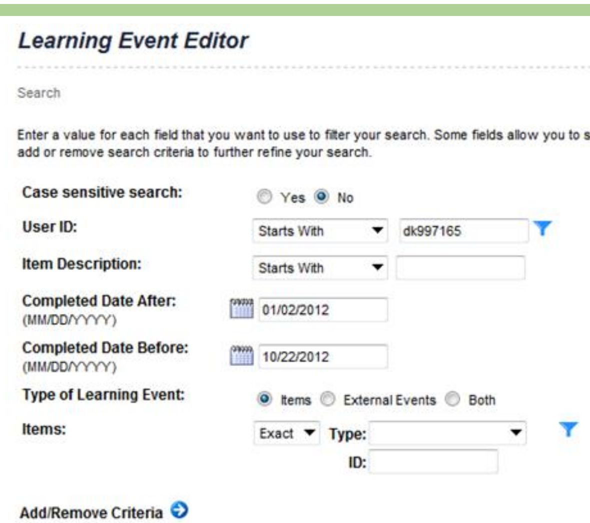
1. Click the **Users** button.

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

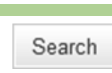


3. Select **Learning Event Editor**.

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

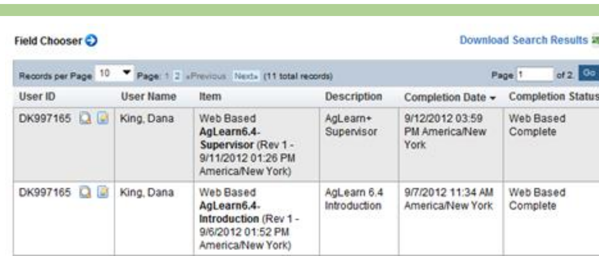


5. Click **Search**.



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

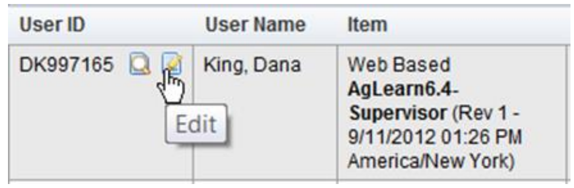
Tip: Use the **Ctrl+F** function to quickly find an event.



Delete a Learning Event (1411)

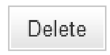
Step | **Activity** | **View**

7. Click the **Edit** icon for the event you wish to edit.



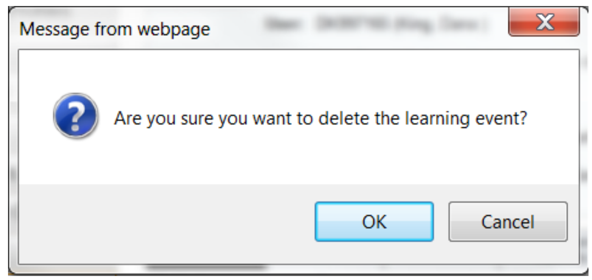
Bet you saw this coming, didn't you?

8. Click **Delete**.



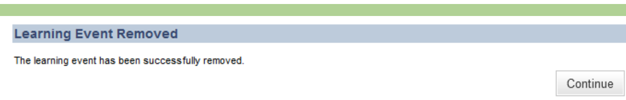
Be sure. There is no Undo button once you click OK. If you delete the wrong item, you will have to re-add it from scratch.

9. AgLearn will ask if you are sure. Click **OK**.

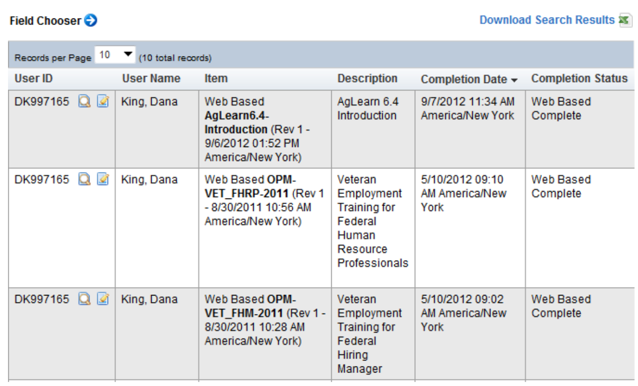


10. A confirmation page appears.

Click **Continue** to return to your previous search results.



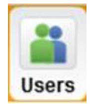
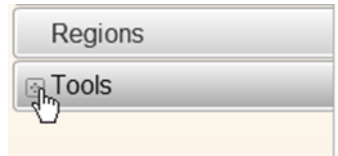
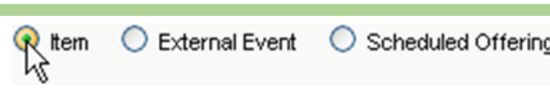
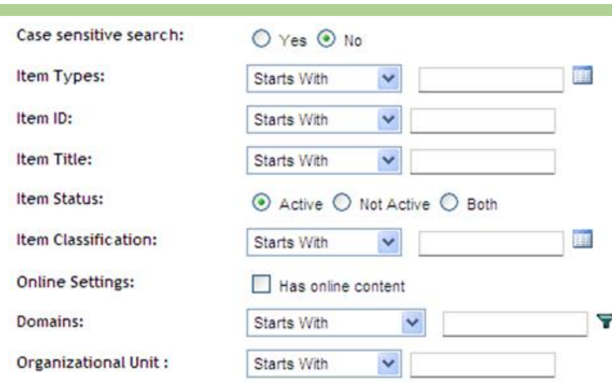
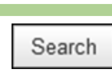
11. The item you just deleted no longer appears in the search results.



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

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

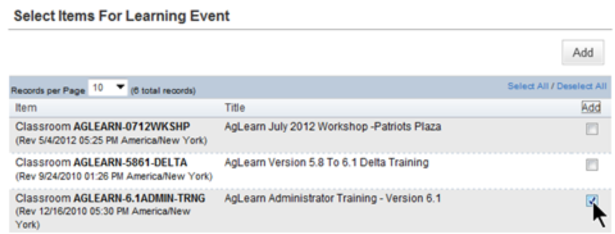
Record a Learning Event for an Item (1411)

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Click the Users button.</td><td>
</td></tr>
<tr><td>2.</td><td>Select Tools from the left menu.</td><td>
</td></tr>
<tr><td>3.</td><td>Select Record Learning - Multiple.</td><td>
</td></tr>
<tr><td>4.</td><td>Select the Item option.
Note: This is the default selection.</td><td>
</td></tr>
<tr><td>5.</td><td>Click the Item ID Search icon to search for and enter an item to record for the learning event.</td><td>
</td></tr>
<tr><td>6.</td><td>On the > Search screen, enter the appropriate search criteria.
Note: See Managing Data Entry and Searches for more detailed information on searching.</td><td>
</td></tr>
<tr><td>7.</td><td>Click Search.</td><td>
</td></tr>
</table>

Record a Learning Event for an Item (1411)

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

8. On the **Results** screen, check the **Add** box for the item or items for which you wish to grant credit.



If the same group of users is to receive credit for multiple items, repeat the process until all the necessary items are included.

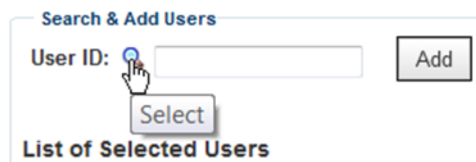
9. Click **Add**.

When granting completions for multiple items, be sure to verify them all. Removing them is tedious work.

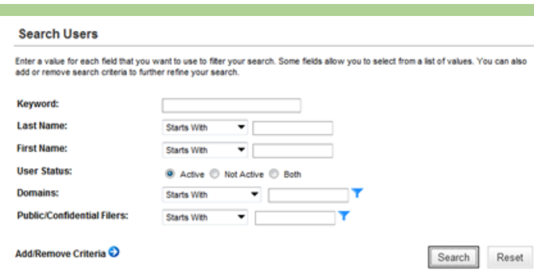
10. Verify the proper **Item ID, Revision Date**, and **Item Title** appear.

If you know the User IDs, you may type them in the box (separated by commas) and click the **Add** button.

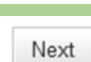
11. Click the **User ID** Search icon to search for and enter the user or users for the learning event.



12. Search for and add the users as you would any other search.



13. After completing the list of users to receive credit, click **Next**.

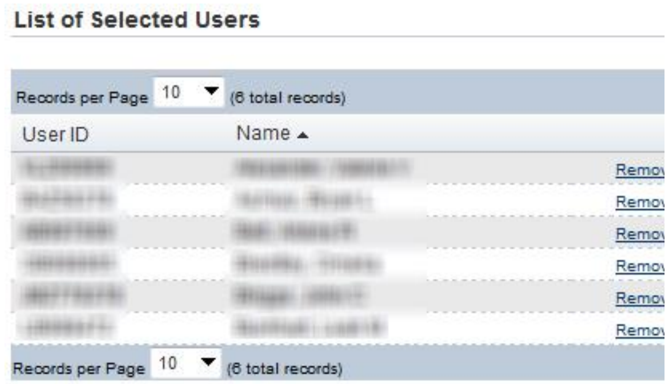


Record a Learning Event for an Item (1411)

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

14. If everyone selected is to receive the same completion status for the same dates, continue to Step 15.

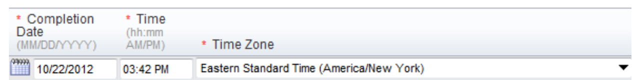
If some users will receive different completion dates, completion statuses, or have additional comments added to their completions, skip to Step 20.



The default is the current day.

15. Edit the **Completion Date**, if necessary.

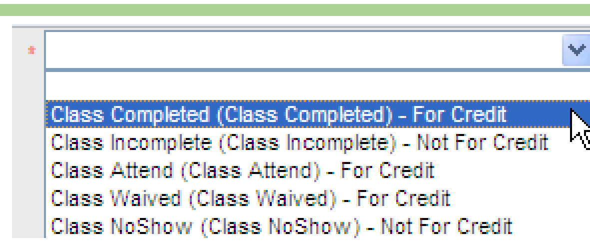
Note: The **Time** and **Time Zone** will default to the time you are performing the work. This is fine.



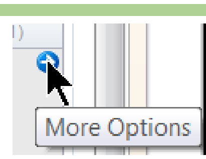
The screen is misaligned here and seems to indicate that a Grade is required. Only the Completions Status is required; the Grade is not.

16. Complete the **Grade/Completion** box and edit any of the other fields, as necessary.

Note: The example shown is for a classroom Item; the pull-down choices will vary.



17. To add comments to be included in the completion records, click the **More Options** icon at the far right.



It is somewhat unusual to add instructor information and comments. If you do add comments, they will be visible to anyone who views this user's Completed Work. Use discretion.

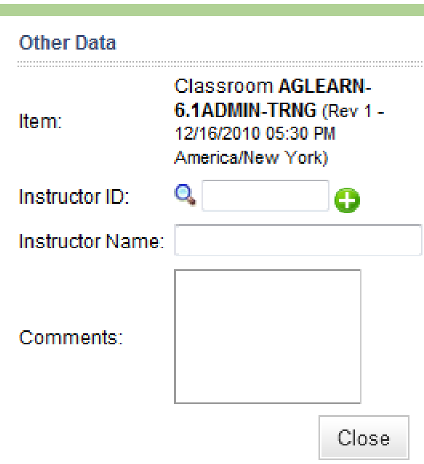
18. You can add an Instructor ID by clicking the **Search** icon and searching as you would for any other object.

OR

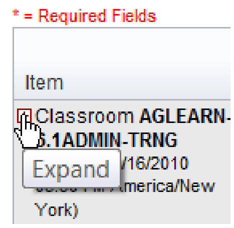
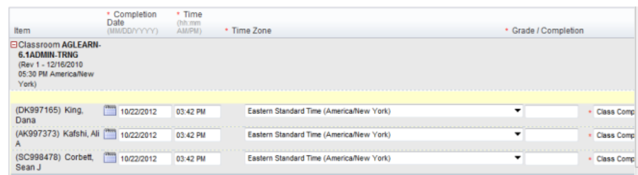
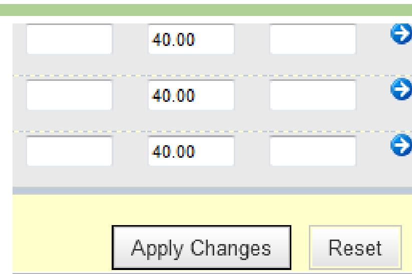
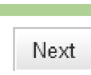
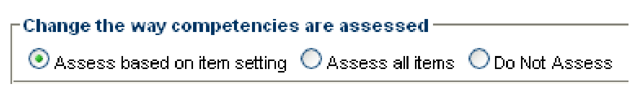
You can type the instructor's name in the **Instructor Name** field.

Type comments (if any) in the **Comments** field.

Click **Close** when finished.



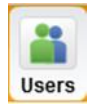
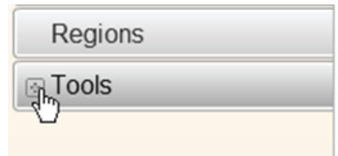
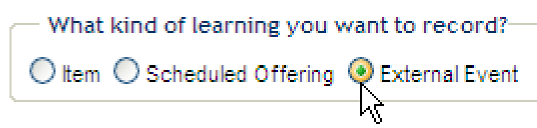
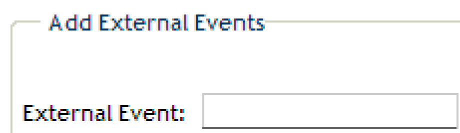
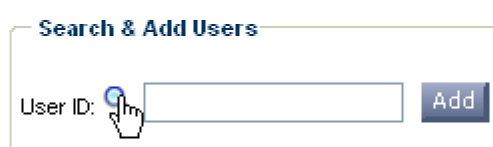
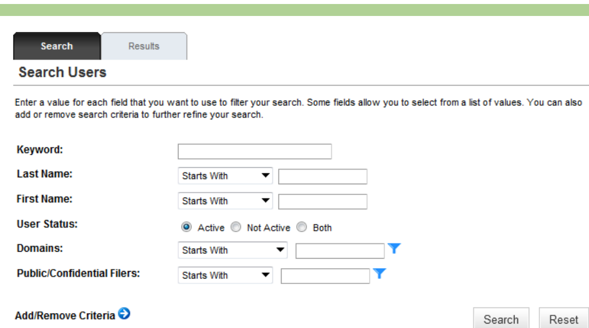
Record a Learning Event for an Item (1411)

Step	Activity	View
19.	Click **Apply Changes**. (You may have to scroll to the right to see it.) Skip to Step 23.	
20.	To enter unique Completion Dates or Statuses for various users, click the **Expand** icon to the left of the item's identifying information.	
21.	Edit the individual Completion Dates and Statuses as necessary.	
22.	Click **Apply Changes.** **Note:** It used to be you had to click the Apply Changes button in the yellow area or your work would be lost. This is no longer true.	
23.	Click **Next**.	
24.	Choose whether you want AgLearn to assess competencies based on each Item's individual settings, assess all Items, or not to assess any competencies.	
25.	Verify the accuracy of the data.	
26.	Click **Submit**.	

If many users will have the same information throughout, select the Completion Date and Completion Status before expanding the list, then edit as needed.

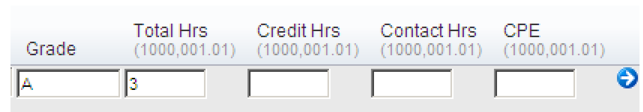
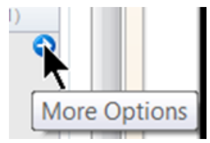
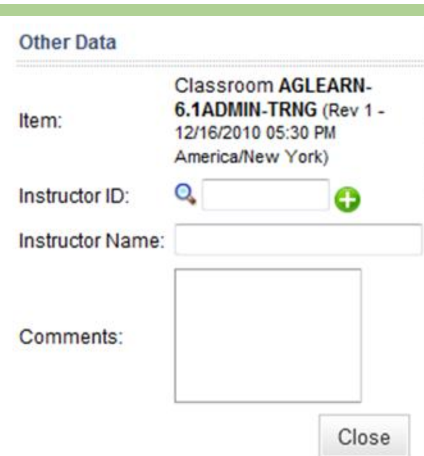
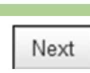
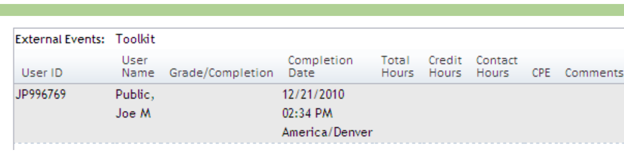
Record an External Learning Event (1411)

The vast majority of external events enter Completed Work through the SF-182 process, after verification.

Step	Activity	View
1.	Click the Users button.	
2.	Select **Tools** from the left menu.	
3.	Select **Record Learning – Multiple.**	
4.	Select **External Event** in **What kind of learning do you want to record?**	
5.	Type a description of the external event.	
6.	Click **Add**. Repeat Steps 3 and 4 as necessary.	
7.	In the **Search & Add Users** box, click the **Search** icon next to **User ID**.	
8.	Search for and add the user(s) you wish to give credit to in the resulting pop-up box.	

If you already know the user' IDs, you may type them directly into the box. Remember, when entering directly, capitalization counts.

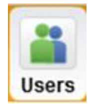
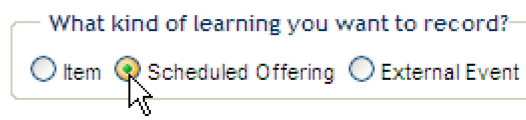
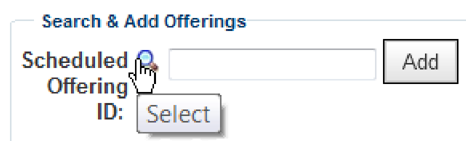
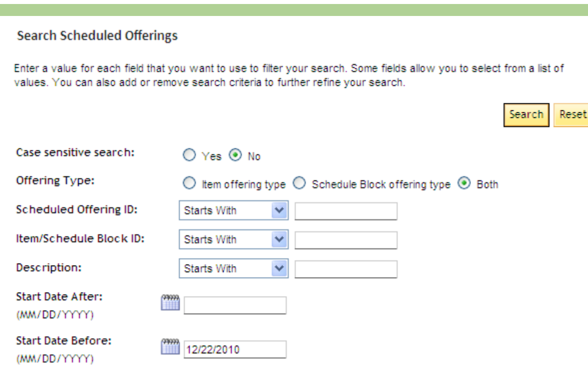
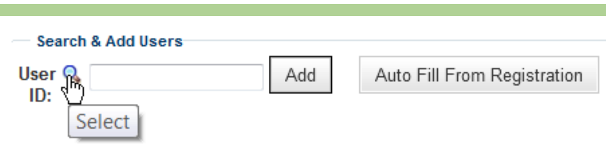
Record an External Learning Event (1411)

Step	Activity	View
9.	Click **Next**.	
10.	Edit the **Completion Date**, if different.	
11.	Complete the **Grade** box and edit any of the other fields, as necessary.	
12.	To add comments to be included in the completion records, click the **More Options** icon at the far right.	
13.	You can add an Instructor ID by clicking the **Search** icon and searching as you would for any other object. OR You can type the instructor's name in the **Instructor Name** field. Type comments (if any) in the **Comments** field. Click **Close** when finished.	
14.	Click **Apply Changes**. (You may have to scroll to the right to see it.)	
15.	Click **Next**.	
16.	Verify the accuracy of the data.	
17.	Click **Submit**.	

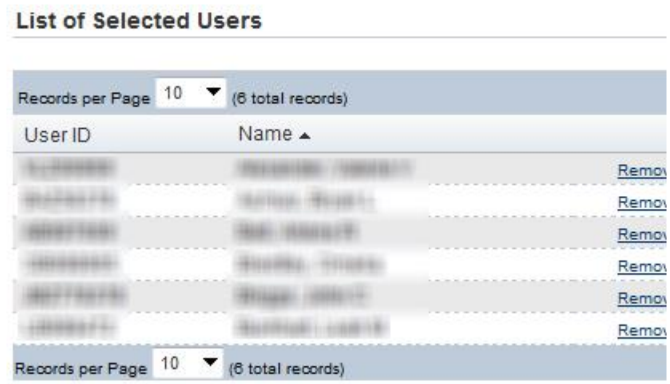
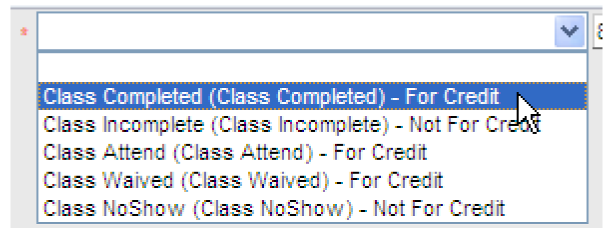
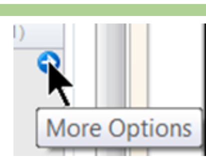
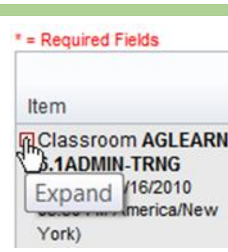
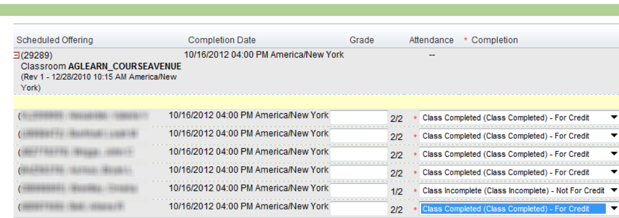
Tip: To avoid data formatting errors, use the Calendar and Selection icon assistants.

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

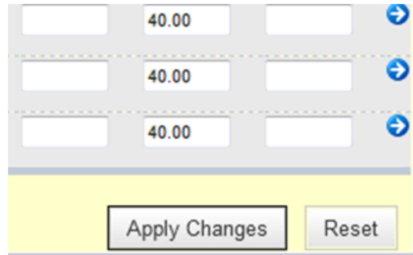
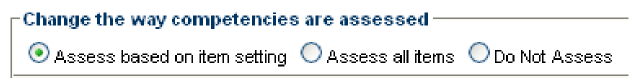
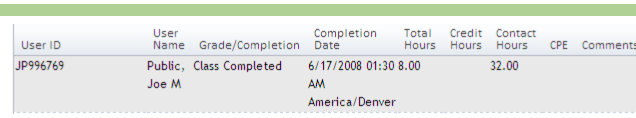
Record a Learning Event for a Scheduled Offering (1411)

	Step	Activity	View
	1.	Click the **Users** button.	
	2.	Select **Tools** from the left menu.	
	3.	Select **Record Learning – Multiple.**	
	4.	Select **Scheduled Offering** in **What kind of learning do you want to record?**	
If you know the numeric ID of the Scheduled Offering, you may type it directly in the box, and click **Add**.	**5.**	In the **Search & Add Offerings Box**, click the **Search** icon next to **Scheduled Offering ID**.	
	6.	Search for and add the scheduled offering(s) for which you wish to give credit in the resulting pop-up box.	
Think twice before clicking the Remove link for a user. If they cancelled, that's fine. If they just didn't show up, there is a No Show status.	**7.**	Click **Auto Fill From Registration** to have AgLearn populate the list of enrolled users for you. You can add or remove users as needed. You also have the option to search for them individually, though it will be far more time consuming.	

Record a Learning Event for a Scheduled Offering (1411)

	Step	Activity	View
	8.	Click **Next**.	
	9.	If everyone selected is to receive the same completion status, continue to Step 10. If some users will receive different completion statuses, or have additional comments added to their completions, skip to Step 13.	
	10.	Select a completion status from the **Completion** drop-down box and edit any of the other fields as necessary.	
Any comments will be visible to anyone with access to view the completion records. Use discretion.	**11.**	To add comments to be included in the completion records, click the **More Options** icon at the far right.	
	12.	Click **Apply Changes**. (You may have to scroll to the right to see it.) Skip to Step 16.	
	13.	To enter unique Completion Statuses for various users, click the **Expand** icon to the left of the item's identifying information.	
To learn how to track users' attendance by individual segments, see the section titled, "Track Student Attendance by Segment" in this guide.	**14.**	Edit the individual Completion Statuses as necessary.	

Record a Learning Event for a Scheduled Offering (1411)

Step	Activity	View
15.	Click **Apply Changes.** **Note:** It used to be you had to click the Apply Changes button in the yellow area or your work would be lost. This is no longer true.	
16.	Click **Next**.	
17.	Choose whether you want AgLearn to assess competencies based on each Item's individual settings, assess all Items, or not to assess any competencies.	
18.	Verify the accuracy of the data.	
19.	Click **Submit**.	

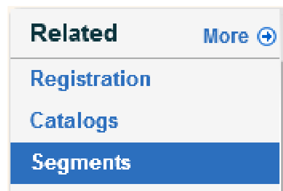
Track Student Attendance by Segment for a Scheduled Offering (1411)

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

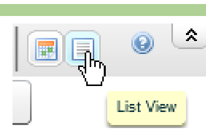
Bookmarking frequently used records saves the trouble of having to repeatedly search for them.

1. Open the record of the scheduled offering for which you wish to track attendance.

2. Click the **Segments** tab.



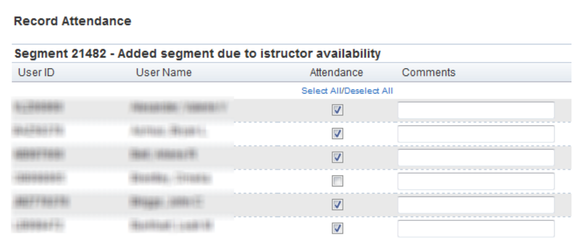
3. List the **List View** button.



The segment must be in the past.

4. Click the **Attendance** link for the segment for which you wish to record attendance.

5. Check the **Attendance** box for everyone who attended. You may add a comment, if you wish.

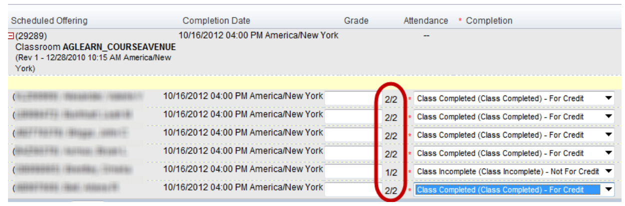


Most scheduled offerings use only one segment per day.

6. If your scheduled has multiple segments on the same day and the attendance was the same for all, click the **Copy to Same Day Segments** button.

7. When complete, click **Apply Changes.**

Track Student Attendance by Segment for a Scheduled Offering (1411)

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>8.</td><td>When recording credit for the scheduled offering, the attendance for each student will appear.</td><td>
</td></tr>
</table>

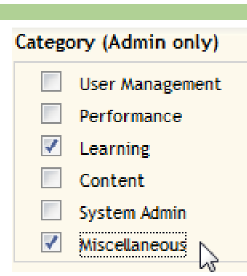
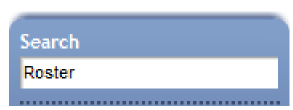
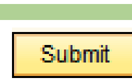
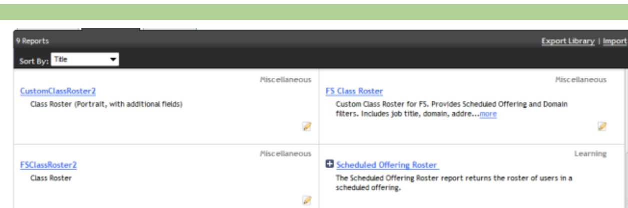
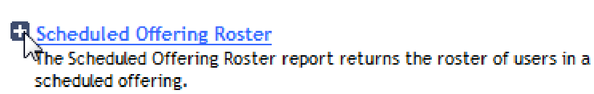
Reports (1411)

AgLearn provides many report options, each of which offers various grouping, sorting, formatting, and printing options.

A search window allows admins to search across report categories to find the desired report. They can 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 reside in the Report Jobs tab.

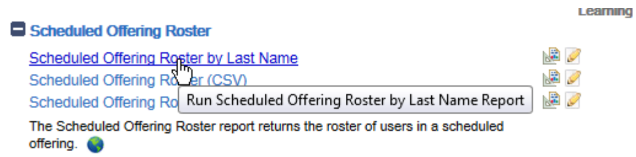
The report subtasks chosen to illustrate typical report activity steps are the **Run a Scheduled Offering Roster Report**, **Run a Certificate of Completion for Offerings Report**, **Run a User Curriculum Status Group by Curriculum (CSV) Report, and Run a Completed Work Report.**

Run a Scheduled Offering Roster Report (1411)

	Step	Activity	View
	1.	Select the **Reports** menu tab.	
By selecting the Miscellaneous category, you will always see any custom reports with similar titles.	**2.**	Select the **Learning** and **Miscellaneous** report categories.	
	3.	Enter **Roster** in the Report Search Window.	
Not all reports are accessible by all roles.	**4.**	Click **Submit**.	
There are also a number of custom reports available for rosters.	**5.**	Scroll through the list of reports to find the **Scheduled Offering Roster** report.	
	6.	Expand the group of reports available.	

Note: Most reports offer the option of a comma separated values (CSV) file, which returns an Excel spreadsheet. Choose CSV when selecting which report to run.

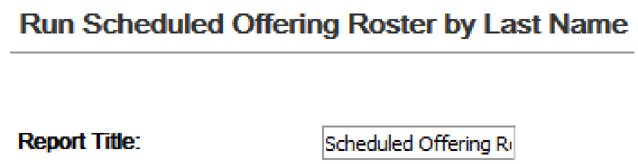
7. Select the report format you wish to run.



Red asterisk denote required fields. Although remaining fields are not required, you should complete as many as you feel are necessary to better define your results

8. Enter a report title in the **Report Title** field.

Note: The **Report Title** default is to display the name of the actual report.

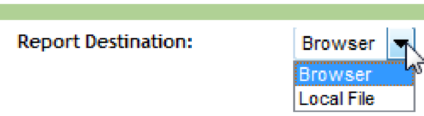


9. Enter a header and footer for the report in their respective fields.

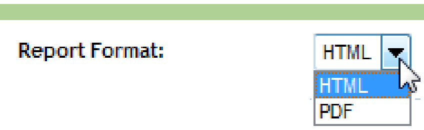
Note: **Report Header** and **Footer** do not have a default setting.

Browser is the default selection, and when selected, it displays the report on your monitor, in a browser window. **Local File** saves the report to your computer.

10. Select either the **Browser** or **Local File** view option to select a report destination.



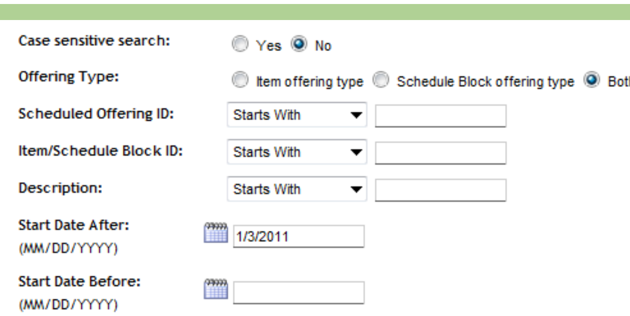
11. Select either HTML or PDF as the **Report Format**.



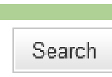
You can enter the Scheduled Offering ID directly into the appropriate field if you know it. If so, skip to Step18.

12. Click the **Filter** icon to search for and select a scheduled offering.

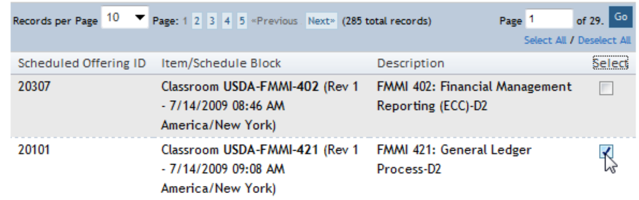
13. Enter the appropriate criteria for filtering the scheduled offering request.



14. Click **Search**.

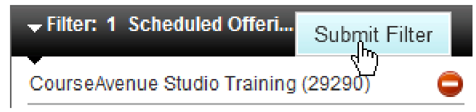


15. Click the **Select** check box corresponding to the appropriate scheduled offering(s).



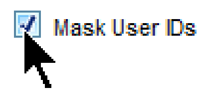
16. Click **Add to Filter**.

17. Verify you've selected the desired offering, then click **Submit Filter**.



AgLearn User IDs are not PII. Still, it's generally a good idea to leave this box checked unless there is some reason you will need the IDs later.

18. Uncheck the **Mask User IDs** checkbox if you wish the users' AgLearn IDs to display with the report.

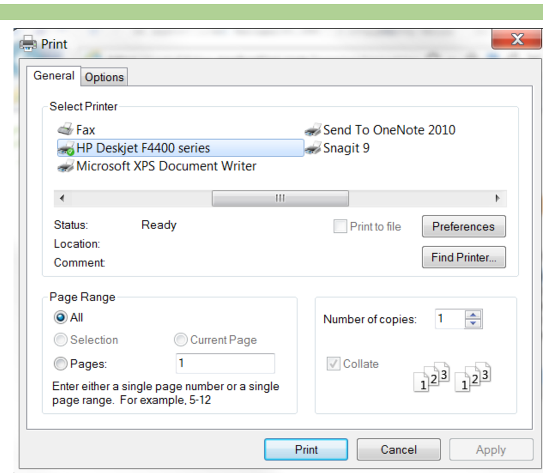


AgLearn directs you to a **Schedule Job** screen if the number of records in the report exceeds a predefined threshold.

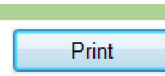
19. Click **Run Report** to display the report.

20. To Print the report, press **Ctrl+P**, then **Print** for HTML formats.

Note: For PDF formats, simply click the **Print** icon.

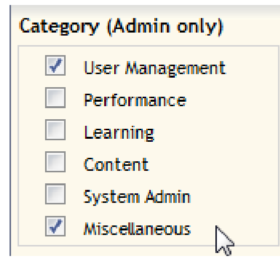
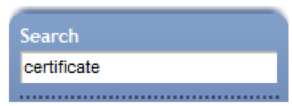
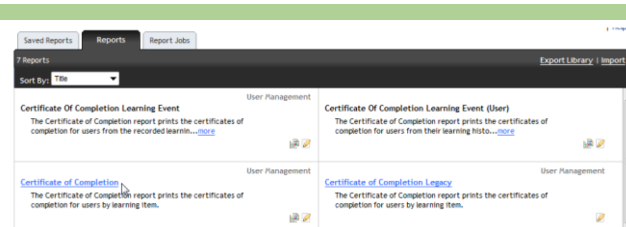
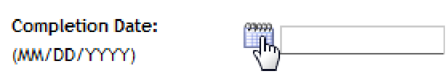
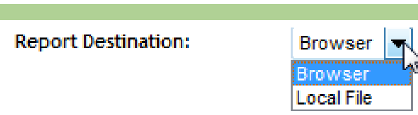


21. Click **Print** to print the report.

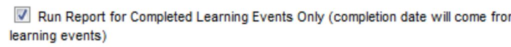
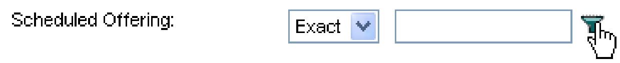
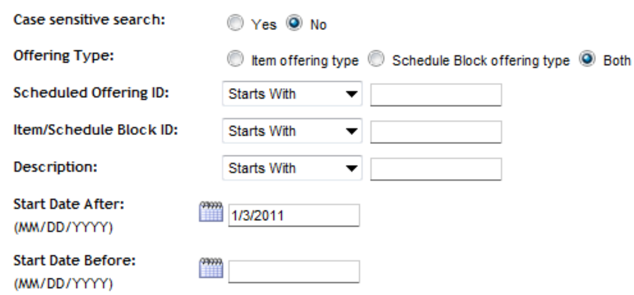
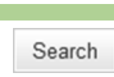
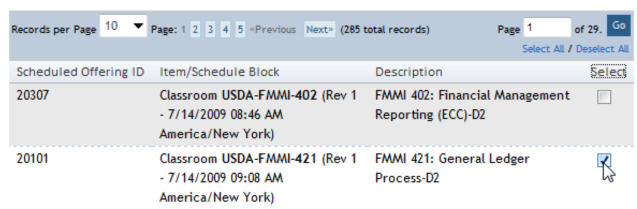
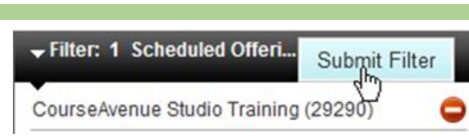
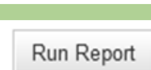


Note: For additional information about scheduling a background job, see **Scheduling a Background Job**.

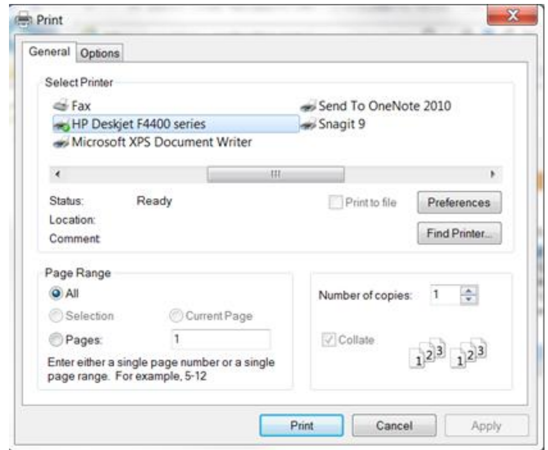
Run a Certificate of Completion for Offerings Report (1411)

	Step	Activity	View
Print Certificates of Completion for Offerings before an instructor-led offering for presentation at the end of class.	**1.**	Select the **Reports** menu tab.	
By selecting the Miscellaneous category, you will always see any custom reports with a similar titles.	**2.**	Select **User Management** and **Miscellaneous** from the Category menu.	
	3.	Enter **Certificate** in the Report Search Window.	
Not all reports are accessible by all roles.	**4.**	Click **Submit**.	
	5.	Scroll through the list of reports to find the **Certificate of Completion for Offerings** report.	
	6.	Select the report title.	
Red asterisks denote required fields. Although remaining fields are not required, you should complete as many as you feel are necessary to better define your results	**7.**	Enter a report title in the **Report Title** field. **Note**: The **Report Title** default is to display the name of the actual report.	
	8.	Enter the name of the instructor in the **Signature Text** field.	
	9.	Click the **Calendar** icon to enter the completion date.	
	10.	Select either the **Browser** or **Local File** view option to select a report destination.	

Run a Certificate of Completion for Offerings Report (1411)

Note	Step	Activity	View
Selecting PDF will produce certificates ready to be printed and signed by the instructor.	**11.**	Select either HTML or PDF as the **Report Format**.	
If you are creating Certificates of Completion to hand out at the end of class, uncheck this box.	**12.**	Check the box to run this report for **Completed Learning Events** only.	
You can enter the scheduled offering ID directly into the appropriate field, if you know it.	**13.**	Click the **Filter** icon to search for and select a Scheduled Offering.	
	14.	Enter the appropriate criteria for filtering the Scheduled Offering request.	
	15.	Click **Search**.	
	16.	Select the **Select** check box corresponding to the appropriate Scheduled Offering(s).	
	17.	Click **Add to Filter**.	
	18.	Verify that you've selected the desired offering, and then click **Submit Filter**.	
	19.	On the **Run Certificate of Completion for Offerings** screen, click **Run Report** to display the report.	

Run a Certificate of Completion for Offerings Report (1411)

Step	Activity	View
20.	To Print the report, press **Ctrl+P**, then **Print** for HTML formats. **Note:** For PDF formats, simply click the **Print** icon.	
21.	Click **Print** to print the report.	

Note: For additional information about scheduling a background job, see **Scheduling a Background Job**.

Run a User Curriculum Status Group by Curriculum (CSV) Report (1411)

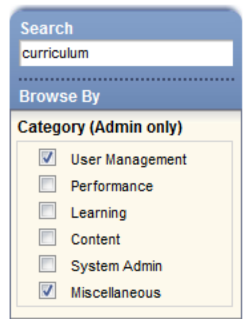
Step | **Activity** | **View**

The Curriculum Status Report is a quick way to keep tabs on much of your agency's mandatory training.

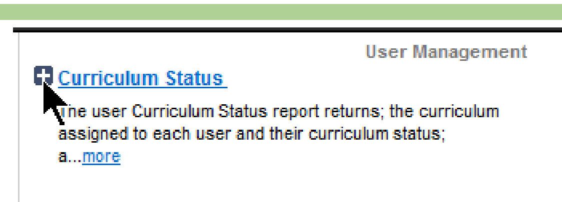
1. Select the **Reports** menu.

By selecting the Miscellaneous category, you will always see any custom reports with a similar title.

2. Select **User Management** and **Miscellaneous** from the **Category** menu. Type in "curriculum" and click Submit.

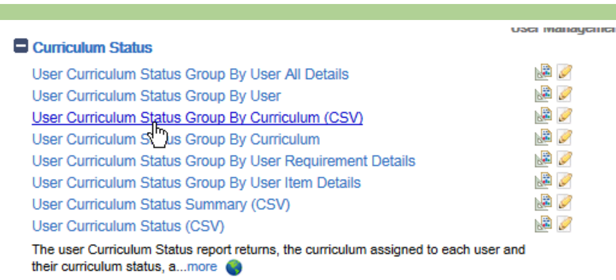


3. Open the **Curriculum Status** Group.

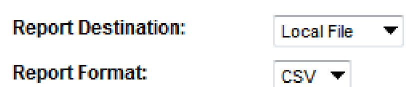


Not all reports are accessible by all roles.

4. Select **User Curriculum Status Group By Curriculum (CSV)**.

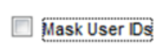


5. Leave the **Report Destination** and **Report Format** set to the defaults.

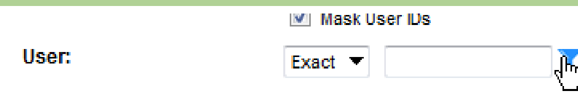
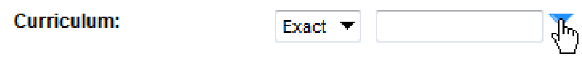
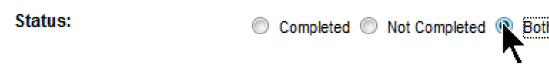
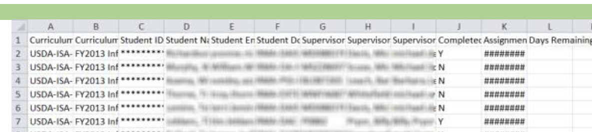


Displaying the User IDs may be helpful in this case, should you wish to send AgLearn reminders to those who are incomplete.

6. Uncheck, or leave checked, the **Mask User IDs** check box, as needed.



Run a User Curriculum Status Group by Curriculum (CSV) Report (1411)

	Step	Activity	View
	7.	Click the **Filter by Criteria** icon to search for and select users. **Note**: If you are setting up a report to run on a recurring basis, it is wise to use the Submit Criteria option at the domain level, as that will always search the domain or sub-domains indicated. If you select a list of users, AgLearn will look only for them, no matter how out of date the list becomes.	
If you have the Curriculum ID for a single curriculum search, you can copy and paste it here.	**8.**	Click the **Filter by Criteria** icon to search for and select the **curriculum** or curricula for the report.	
It's often a good idea to pick Both. A quick sort in Excel allows you to easily compare the number complete against the number incomplete.	**9.**	Select the Completion **Status** you want to see in the returned data.	
	10.	Click **Run Report** if you want the report to run now. Click **Schedule Job** if you need the report to run after hours, or want to schedule it as a recurring job.	
If you asked for "Both" in Step 9, you can sort the "Completed" column alphabetically to quickly sort those who are complete from those who are not.	**11.**	The data returns as a CSV file that can be opened in Excel.	

Note: For additional information about scheduling a background job, see **Scheduling a Background Job**.

Run a Completed Work Report (1411)

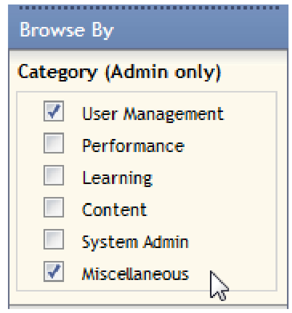
Step | **Activity** | **View**

The Completed Work report is helpful when you need to know who has completed training in your agency during a specified time period.

1. Select the **Reports** menu.

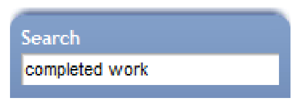
By selecting the Miscellaneous category, you will always see any custom reports with a similar titles.

2. Select both the **User Management** and **Miscellaneous** category from the Category menu.



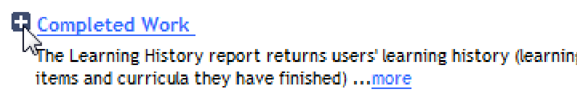
Not all reports are accessible by all roles.

3. Enter **Completed Work** in the Report Search Window.



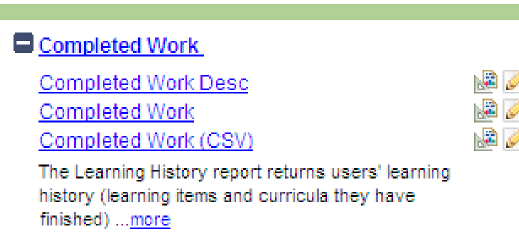
4. Click **Submit**.

5. Click the **+** to expand the **Completed Work** report group.



The CSV option will produce data in Comma Separated Values format, which opens as an Excel spreadsheet. The other options produce results in browser or PDF format.

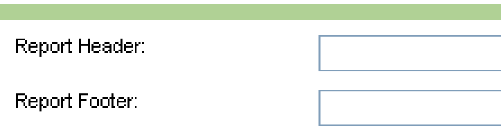
6. Select the type of report you wish to run.



7. Enter a report title in the **Report Title** field.

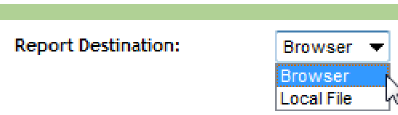
Note: Report Header and Footer do not have default settings.

8. Enter a header and footer for the report in their respective fields.

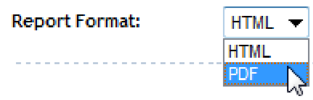
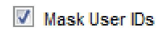
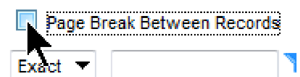
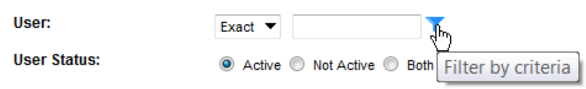
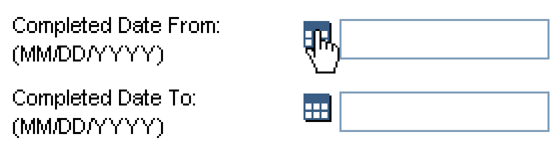


Browser is the default selection and displays the report within the browser. Local File saves the report as a file on your computer.

9. Select either the **Browser** or **Local File** option for your report destination.



Run a Completed Work Report (1411)

	Step	Activity	View
	10.	Select a **Report Format** option to change the report format.	
AgLearn User IDs are not PII. Administrators usually hide them as a courtesy unless they needed for another action.	**11.**	Leave the box checked to **Mask User IDs**, unless there is a reason to see them.	
Inserting a page break between records can create a problem, depending on how AgLearn groups and sorts the report data. If you're not careful, you could end up with a single line on each of 10,000 pages.	**12.**	Uncheck the **Page Break Between Records** box, unless you are sure you want one.	
Use Submit Criteria when possible if the report will run multiple times in the future. Saving a list of names means AgLearn will always run the report for that list of names, which may not be valid in a month or a year. Using Submit Criteria for a domain not only allows the report to run faster, it will always look for whoever is in the domain whenever the report runs.	**13.**	Select the **Filter by criteria** icon to open a search window to search for and select users as you would in any other search. **Note**: When the search will include an entire domain or sub-domain, use the **Submit Criteria** button instead of performing a complete search. This will not only make the report run faster, it will make it more useful if the save it or schedule it for multiple occurrences.	
You can leave either or both blank.	**14.**	Click the Completed Date **Calendar** icons to select and enter the dates between which you want completed training to appear on your report.	
	15.	Click the **Detail** button if want more information **Note**: The Summary button is the default.	

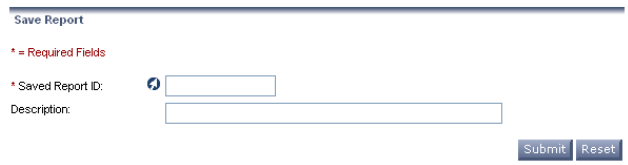
Run a Completed Work Report (1411)

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

16. If this is a frequently-run report, click **Save Report**.

If this will be a regularly run report, you may wish to schedule it. For instructions on scheduling reports to run after hours, see the section “Scheduling Background Jobs,” below.

17. Fill in a **Saved Report ID** and **Description**.



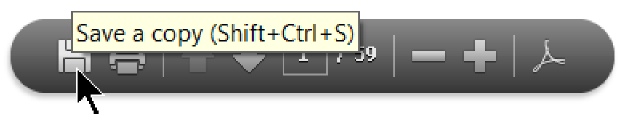
If the report will need to access too many records, AgLearn may ask you to schedule it outside of working hours.

18. Click **Submit**.

19. Click **Run Report** to display the report.

USDA’s green policies discourage printing reports unless absolutely necessary. Saving a PDF report to your hard drive allows you to email it to whoever needs to view it.

20. Click the **Save** icon to save this report to your hard drive.



Note: For additional information about scheduling a background job, see **Scheduling a Background Job**.

Scheduling Background Jobs (1411)

Tasks available for scheduling as background jobs vary based on the administrator's roles.

Background jobs are tasks that can be time-consuming, include too many records, or dramatically affect system performance, scheduled to run at off-peak work hours, where they will not overload the system.

Background jobs are scheduled for the tasks available through the **User Needs Management Wizard**, the **Item Revision Wizard**, and for system **Reports**.

Background job scheduling tasks include **View** and **Schedule a Background Job.**

Note: Scheduling a background job is the final step of specific tasks, when both the **Run Job Now** and **Schedule Job** buttons appear.

The tasks available for scheduling as background jobs through the **User Needs Management Assistant** can include: **Add and Remove Curricula**, **Add and Remove Items**, **Add and Remove Competency Profiles**, **Add and Remove Competencies**, **Add Job-related Curricula**, and **Add Job-related Competency Profiles**. See **User Needs Management Assistant** for more detailed information on performing these tasks.

The **Item Revision Assistant** also allows for the scheduling of background jobs. See **Managing Items** for more detailed information on using the Item Revision Assistant.

Reports can also be scheduled as background jobs. See **Reports** for more detailed information. This guide will focus on the scheduling of reports. The procedures are the same for the other tasks noted above.

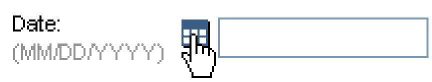
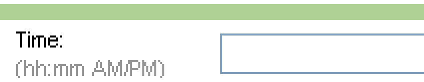
Schedule a Report to run as a Background Job (6.4)

Any function in User Needs Management can also be set to run after hours.

The time block to schedule background jobs between midnight and 5 AM ET during the week, or any time on Saturday or Sunday. To see all of the available time slots, click the **View Available Time Slots** link shown in Step 2.

This can be important if you'll have multiple pending jobs.

You're going to want AgLearn to notify you, if only to remember to check to see that the job ran successfully.

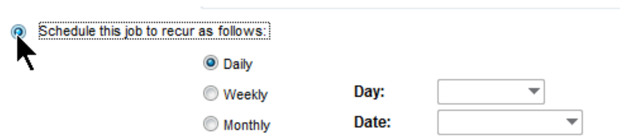
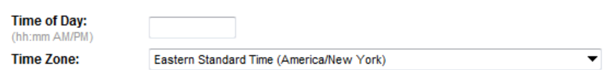
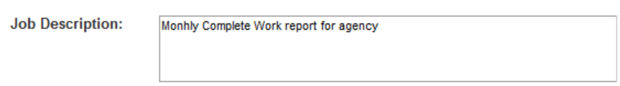
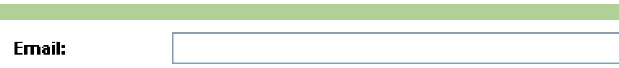
Step	Activity	View
1.	After inputting the criteria for a report, click **Schedule Job**.	
2.	Select the **Schedule this job to be executed on** option button.	
3.	Click the **Date** Calendar icon to select and enter the date the background job will run.	
4.	Enter a **Time** for the background job to run.	
5.	Enter a brief description of the job in the **Job Description** field.	
6.	Select the **Notify via email upon completion** check box to send a notification email.	

Schedule a Report to run as a Background Job (6.4)

AgLearn accepts only one email address.

Step	Activity	View
7.	Enter the recipient's email address.	
8.	Select **Email the Report** to receive a copy of the report with the notification email. **Note**: Your report must be in CSV or PDF format with a destination of Local File for you to receive it via email.	
9.	Click **Finish**.	
10.	Verify that the job's scheduling on the status screen, then click **Finished**. (See **View a Background Report Job**) to check your job's status.	

Schedule a Report to run as a Recurring Background Job (1411)

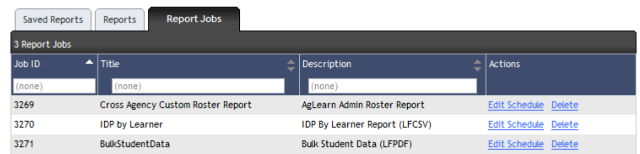
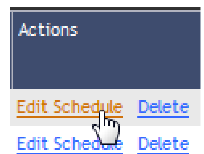
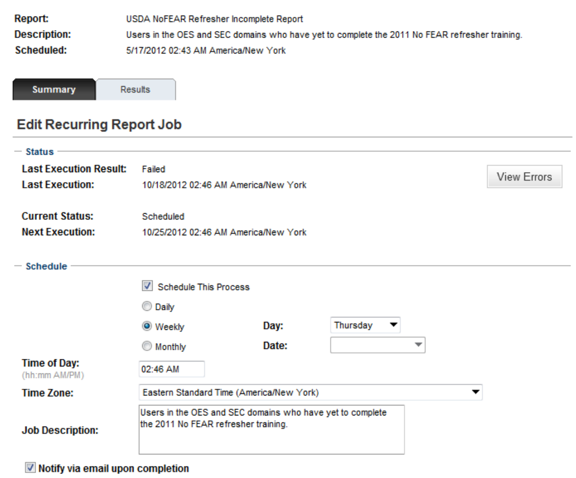
	Step	Activity	View
	1.	After inputting the criteria for a report, click **Schedule Job**.	
The time block to schedule background jobs between midnight and 5 AM ET during the week, or any time on Saturday or Sunday.	**2.**	Select **Schedule the job to recur as follows:** If **Daily**, no additional information is needed. If **Weekly**, specify the day of the week. If **Monthly**, specify the date it is to run each month. Among the options is “Last Day of Month,” whatever that date may be. **Note**: When scheduling a report for a specific day of the week or month, remember the report runs before the work day begins. If you want to capture all data through the end of the month, set it to run on the first day of the next month.	
	3.	Enter the **Time of Day** and **Time Zone**.	
It may be weeks between reports. Make this something the recipient will remember.	**4.**	Enter a **Job Description**.	
	5.	Select the **Notify via email upon completion** check box to send a notification email.	
AgLearn accepts only one email address.	**6.**	Enter the recipient’s email address. **Note**: This can be anyone, so, if preparing a report for someone else, you can have it emailed directly to that person.	

Schedule a Report to run as a Recurring Background Job (1411)

Step	Activity	View
7.	Select **Email the Report** to receive a copy of the report with the notification email. **Note**: Your report must be a CSV or PDF format with a destination of Local File.	
8.	Click **Finish**.	
9.	Verify proper scheduling on the status screen, then click **Finished**. See **View a Background Report Job** to check your job's status.	

Background jobs viewed via this procedure are jobs that are still in queue and have yet to run.

Search For and View a Background Report Job (1411)

Step	Activity	View
1.	Select the **Reports** menu tab.	
2.	Select the **Report Jobs** tab.	
3.	Locate the desired background report job.	
4.	Select the corresponding **Edit Schedule** link to view more information.	
5.	Review the schedule and make changes as necessary. You can review past report results (if any) by clicking the **Results** tab. **Note**: You cannot change the report parameters from here, only the schedule. To change the report parameters, you must delete this job and create a new report.	

Managing Curricula Records (1411)

Curricula group learning to make it easier to assign and track. A curriculum can consist of any AgLearn items, requirements, and sub-curricula—no external events—grouped into combinations that can accommodate virtually any well-defined purpose.

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

Requirements (1411)

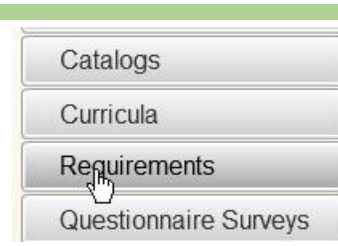
Requirements add flexibility in the administration and completion of curricula by providing users the option to choose several Items from a larger pool, or complete any number of Items from the pool, so long as a minimum requirement is met, either in the number of contact hours, credit hours, or Continuing Professional Education units (CPE). The administrator sets the original parameters and the user then makes specific choices to best suit his/her needs and preferences.

There are three basic types of requirements:

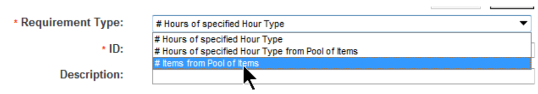
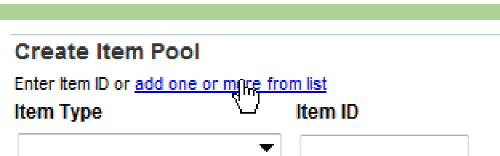
- **Items from a pool of Items** – The requirement may be for the User to complete any three from a pool of five Items (two from a pool of three, four of six, etc.). This type is by far the most popular.
- **Hours (or credits) from a pool of Items** – The requirement may be to complete fifteen hours, credits, or CPEs from a pool of Items. Some certifications require users to attain a specified number of CPE units in their field each year to retain their certification.
- **Hours (or credits) from any Items** – An agency or organization may require any or all of its employees to complete forty hours of training per year, regardless of the discipline or subject.

Like many things in AgLearn, creating requirements is not difficult, but following the process is critical. Below are the steps required to create each of the three major requirements.

Creating a New Requirement: Items from a Pool of Items (1411)

Step	Activity	View
1.	Select the **Learning** button.	
2.	Select **Requirements**.	

Creating a New Requirement: Items from a Pool of Items (1411)

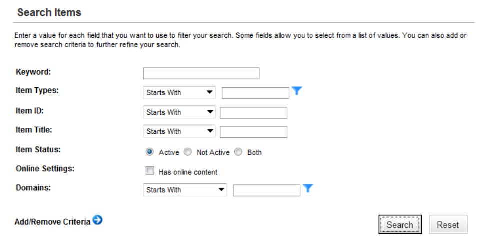
	Step	Activity	View
	3.	Select **Add New**.	
	4.	Select **# items from Pool of Items** from the **Requirement Type** drop-down.	
This can be the same as the curriculum that will use the requirement if that's the only curriculum to use it. There's no rule in AgLearn that says you can't subsequently use that requirement in other curricula, but it gets confusing.	**5.**	Enter an **ID** for the requirement. **Note**: This should begin with your agency's abbreviation. Check with your agency lead if you are unsure of the naming convention.	
	6.	Enter a **Description**.	
Never leave anything in the PUBLIC domain.	**7.**	Enter your **Domain ID**. If you are not sure, search for it by clicking the search icon.	
The default is almost always fine.	**8.**	Enter a **Creation Date** if the default is not applicable.	
You can build an inactive requirement, but you can't do anything with it.	**9.**	Be sure the **Active** box is checked.	
Only administrators will see this comment.	**10.**	Enter any **Comments** for future administrators who may view the record.	
	11.	Click **Next.**	
	12.	Select **add one or more from list** to choose an item to add to the pool.	

Creating a New Requirement: Items from a Pool of Items (1411)

Step **Activity** **View**

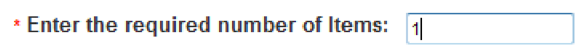
13. Search for and select the item as you would for anything else.

Repeat as often as is needed.



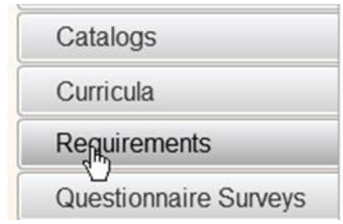
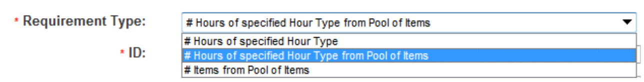
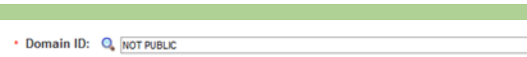
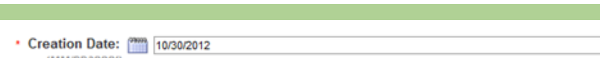
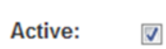
14. Verify the items selected are correct and complete.

15. **Enter the required number of items** in the box.

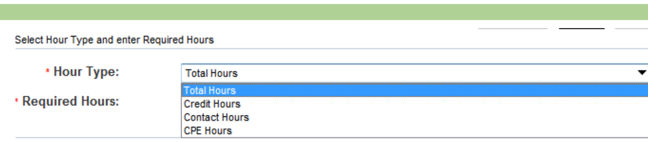
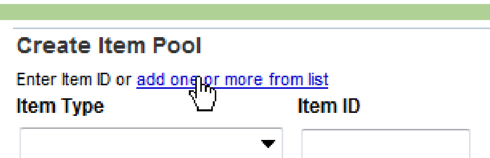
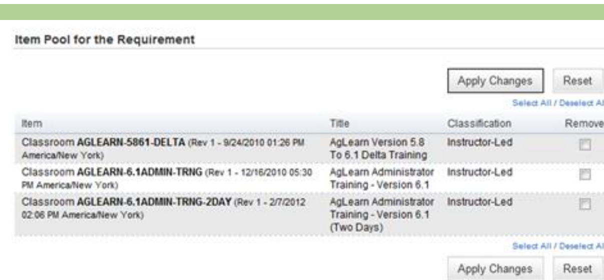
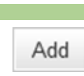


16. Click **Add**.

Creating a New Requirement: Hours of a Specified Type from a Pool of Items (1411)

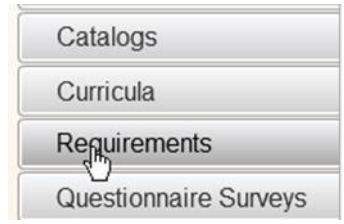
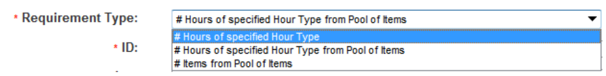
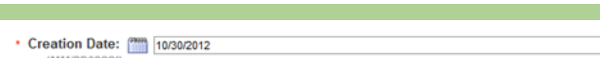
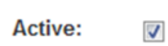
	Step	Activity	View
	1.	Select the **Learning** button.	
	2.	Select **Requirements**.	
	3.	Select **Add New**.	
	4.	Select **# Hours of specified Hour Type from Pool of Items** from the **Requirement Type** drop-down.	
This can be the same as the curriculum that will use the requirement if that's the only curriculum to use it. There's no rule in AgLearn that says you can't subsequently use that requirement in other curricula, but it gets confusing.	5.	Enter an **ID** for the requirement. **Note**: This should begin with your agency's abbreviation. Check with your agency lead if you are unsure of the naming convention.	
	6.	Enter a **Description**.	
Never leave anything in the PUBLIC domain.	7.	Enter your **Domain ID**. If you are not sure, search for it by clicking the search 🔍 icon.	
The default is almost always fine.	8.	Enter a **Creation Date** if the default is not applicable.	
You can build an inactive requirement, but you can't do anything with it.	9.	Be sure the **Active** box is checked.	
Only administrators will see this comment.	10.	Enter any **Comments** for future administrators who may view the record.	

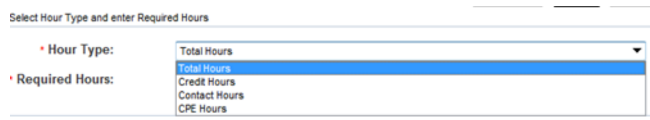
Creating a New Requirement: Hours of a Specified Type from a Pool of Items (1411)

Step	Activity	View
11.	Click **Next.**	
12.	Select the **Hour Type** from the drop-down list.	
13.	Enter the **Required Hours** (i.e., hours of the required type needed to fulfill the requirement).	
14.	To add items to the **Item Pool,** click the **Add one or more from list** link in the **Create Item Pool** module.	
15.	Search for and select the item as you would for anything else. Repeat as often as is needed.	
16.	Verify the items selected are correct and complete.	
17.	When satisfied the pool is accurate, click the **Add** button nearest the top of the page.	

Be sure the items you choose have the appropriate hours associated with them.

Creating a New Requirement: Hours of a Specified Hour Type (1411)

	Step	Activity	View
	1.	Select the **Learning** button.	
	2.	Select **Requirements**.	
	3.	Select **Add New**.	
	4.	Select **# Hours of specified Hour Type** from the **Requirement Type** drop-down.	
This can be the same as the curriculum that will use the requirement if that's the only curriculum to use it. There's no rule in AgLearn that says you can't subsequently use that requirement in other curricula, but it gets confusing.	**5.**	Enter an **ID** for the requirement. **Note**: This should begin with your agency's abbreviation. Check with your agency lead if you are unsure of the naming convention.	
	6.	Enter a **Description**.	
Never leave anything in the PUBLIC domain.	**7.**	Enter your **Domain ID**. If you are not sure, search for it by clicking the search icon.	
The default is almost always fine.	**8.**	Enter a **Creation Date** if the default is not applicable.	
You can build an inactive requirement, but you can't do anything with it.	**9.**	Be sure the **Active** box is checked.	
Only administrators will see this comment.	**10.**	Enter any **Comments** for future administrators who may view the record.	

Creating a New Requirement: Hours of a Specified Hour Type (1411)		
Step	**Activity**	**View**
11.	Click **Next.**	
12.	Select the **Hour Type** from the drop-down list.	
13.	Enter the **Required Hours** (i.e., hours of the required type needed to fulfill the requirement).	
14.	Click **Add**.	

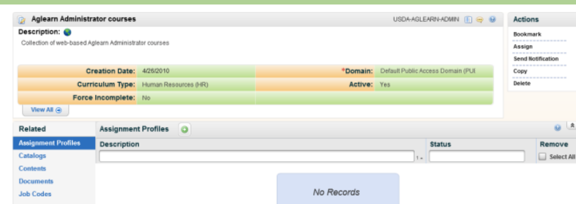
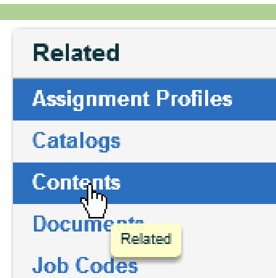
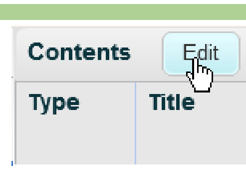
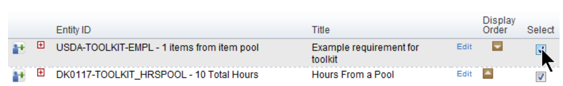
Requirement Grouping (1411)

There are three ways to associate requirements with a curriculum: individually, in multiples, or in groups. When assigned individually, users must fulfill the requirement for the curriculum to complete. When multiple requirements exist in a curriculum, the user must complete them all before the curriculum is complete.

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

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

Creating a Requirement Group (6.4)

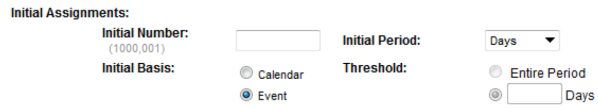
Step	Activity	View
1.	Open the record of the curriculum in which you wish to create a requirement group.	
2.	Select the **Contents** tab in the **Related** area.	
3.	Click **Edit**.	
4.	Find the requirements you wish to group together and click the corresponding **Select** checkboxes.	
5.	Click **Group Requirements**.	
6.	Enter a **Group Description**.	

The initial period tells AgLearn how long a user has to complete the curriculum after assignment.

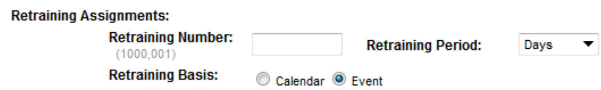
Creating a Requirement Group (6.4)

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

7. (Optional) Enter an **Initial Number**, select an **Initial Period** from the drop-down list, and choose the **Initial Basis** (either Calendar or Event).



8. (Optional) Enter the **Retraining Number**, select a **Retraining Period** from the drop-down list, and choose the **Retraining Basis** (either Calendar or Event).



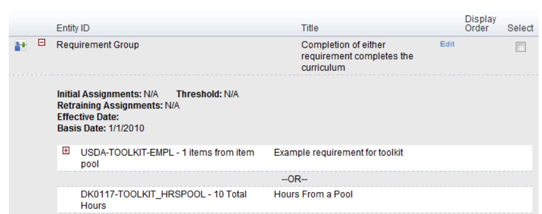
9. Click the Calendar icon to select an **Effective Date**.

Be sure to do this! AgLearn will not assess users' statuses until the Effective Date has passed. Until then, everyone will show as complete.

10. Click **Create Group**.

11. The Group will appear in the **Update the Requirements for the Curriculum** section.

Click the **Expand** icon to review the data and the **Edit** link to update it.



Search For and Edit a Curriculum Record (1411)

Step **Activity** **View**

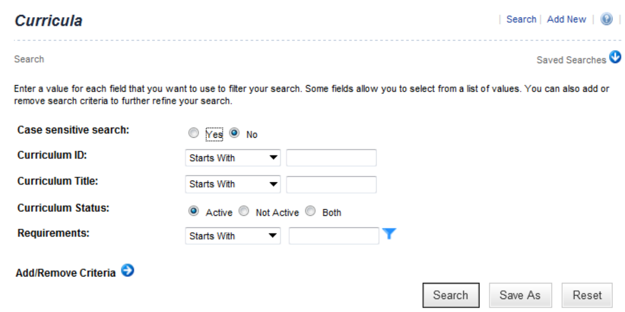
If the curriculum had been bookmarked, you could have skipped the search process altogether.

1. Select the Learning button.

2. Select **Curricula**.

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

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

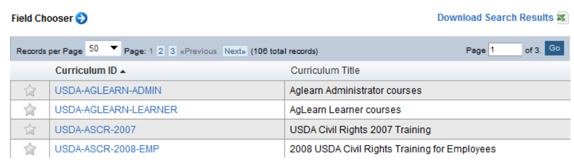


4. Click **Search**.

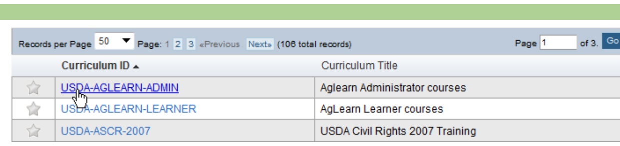
If the Curriculum is in an incorrect domain, a person with permissions in that domain will have to move the record to the correct domain.

5. Locate the desired Curriculum record in the search results.

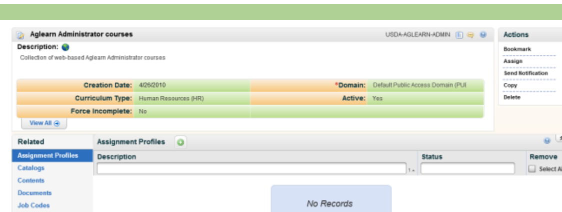
Tip: Use the **Ctrl+F** function to quickly find a Curriculum on the screen.



6. Select the curriculum's link to open the record.



7. Read or edit the record as needed.

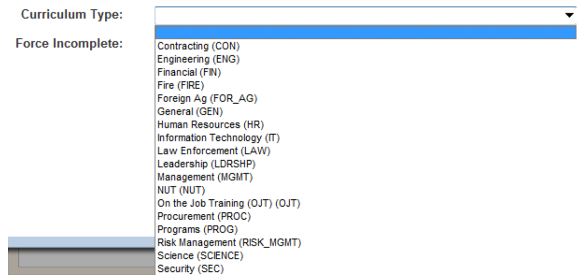
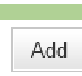
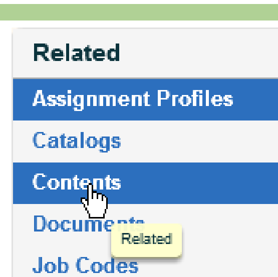
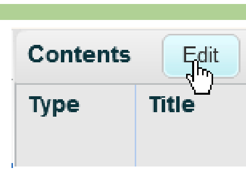
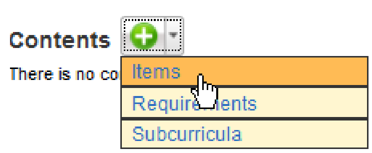


AgLearn shows the required fields with a red asterisk. Although remaining fields are not required, complete as many as you feel are necessary.

Never, ever leave anything in the PUBLIC domain.

Add a New Curriculum (1411)		
Step	**Activity**	**View**
1.	Select the **Learning** button.	
2.	Select **Curricula**.	
3.	Select the **Add New** link.	
4.	Enter the curriculum ID in the **Curriculum ID** field. **Note**: Check with your agency lead for the proper AgLearn naming convention.	
5.	Enter a title for the new curriculum in the **Title** field.	
6.	Enter a **Description**. This is what users will see when viewing the curriculum in the catalog. Be thorough, yet concise.	
7.	Click the **Creation Date** Calendar icon to select and enter a creation date.	
8.	Select the **Active** check box if the Curriculum is active.	
9.	Click the **Domain** Search icon to search for and enter a domain. **Note**: **Domain** is a required field.	

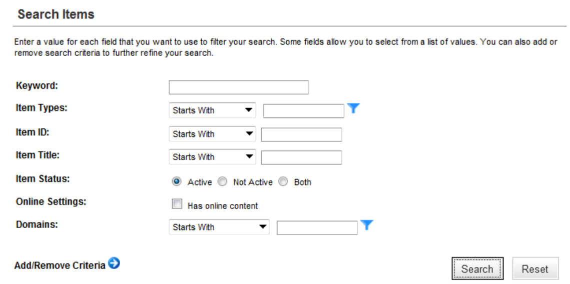
Add a New Curriculum (1411)

	Step	Activity	View
This step is not required.	**10.**	Click the **Curriculum Type** selection icon to search for and enter a curriculum type.	
For a fuller description of when to use Force Incomplete, contact Team AgLearn.	**11.**	Check the **Force Incomplete** box, if necessary. **Note**: This is rarely necessary. Force Incomplete applies only when specifying a retraining interval and AgLearn is to use only the most recent attempt at an item when determining whether the curriculum is complete, regardless of whether time remains in the retraining interval.	
	12.	Click **Add**.	
Few curricula will have all three types of content. Pick only what you need.	**13.**	To add items, requirements, or sub-curricula to the curriculum, click the **Contents** tab in the **Related** area.	
	14.	Click **Edit**.	
"Items" refers to items in the AgLearn catalog that the user must complete in order for the curriculum to be complete.	**15.**	To add items, select **Items** from the **Contents** drop-down.	

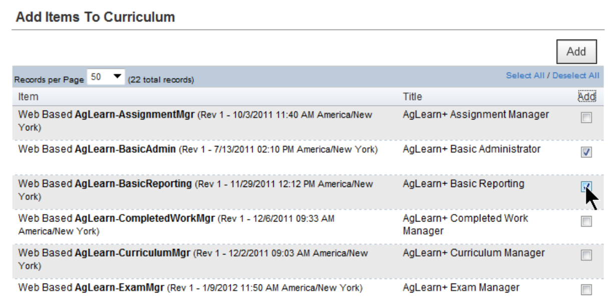
Add a New Curriculum (1411)

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

16. Search for the item as you would anything else.

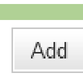


17. Select the item or items to add.

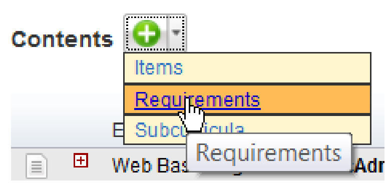


Repeat Steps 14 – 18 as often as necessary to add all the items you need.

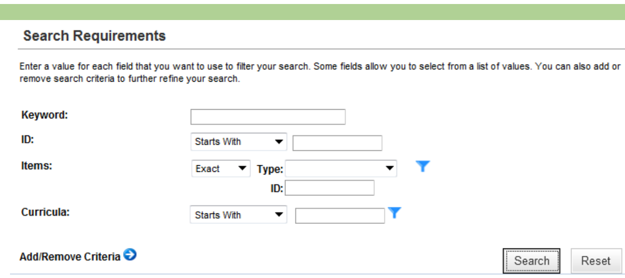
18. Click **Add.**



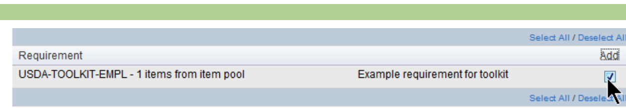
19. To add requirements to the curriculum, select **Requirements** from the **Contents** drop-down.



20. Search for the requirement as you would anything else.

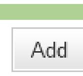


21. Select the requirement or requirements to add.



Repeat Steps 19 – 22 as often as necessary to add all the requirements you need.

22. Click **Add.**

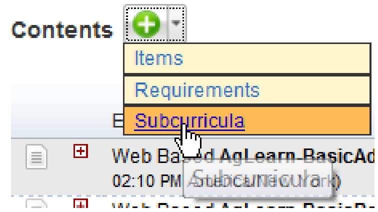


Add a New Curriculum (1411)

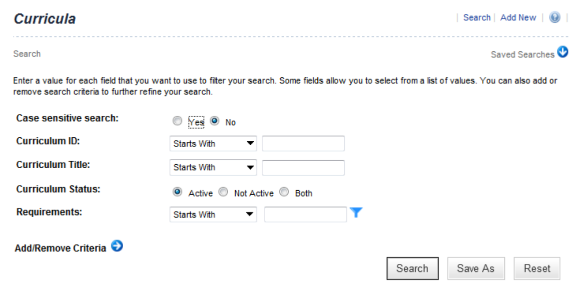
Step **Activity** **View**

A sub-curriculum is another curriculum the user must complete for the curriculum you are working on to be marked complete.

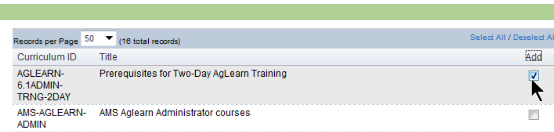
23. To add a sub-curriculum to the curriculum, select **Subcurricula** from the **Contents** drop-down.



24. Search for the sub-curriculum as you would anything else.

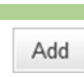


25. Select the sub-curriculum or -curricula to add.



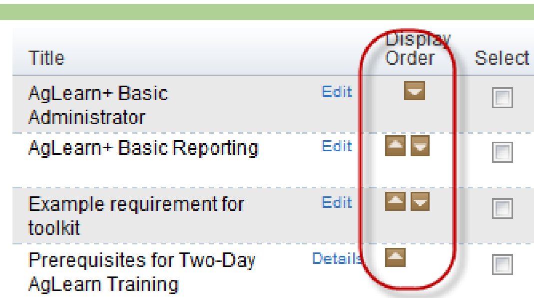
Repeat Steps 19 – 22 as often as necessary to add all the requirements you need.

26. Click **Add.**



The sequence in which they appear is only a suggestion. AgLearn will not compel users to create the components of a curriculum in any particular order.

27. Change the order in which the contents of the curriculum display by clicking the up and down arrows. This applies to both what administrators see, and to how the contents appear to users in the catalog.



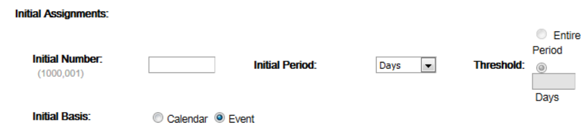
28. Select the **Edit** link for an item or requirement.

Add a New Curriculum (1411)

Step	Activity	View

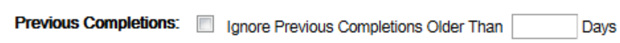
Event-based assignments set the Required By Date for a specified period after a specific event, usually the assignment. Calendar-based assignments allow you to give everyone the same Required By Date regardless of assignment dates, but have some complications of their own. Open an ATAN ticket is this is what you need.

29. **Initial Assignments** tell AgLearn how to set the Required By Date for an item (or requirement). Team AgLearn highly recommends using Days for this, as the other choices have complicating factors.



You cannot set a specific date, which limits the effectiveness of this feature unless you are willing to regularly update the number of days AgLearn is to look back. This feature is of most use for resetting retraining intervals.

30. AgLearn can now ignore completions older than a specified time before the curriculum assignment. Check the **Previous Completion** box and specify the number of days AgLearn may look back before it refuses to count a completion of this item toward the curriculum.



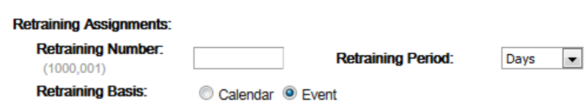
This will almost always be Assignment Date. The definition of Hire Date varies between agencies, and it's better to base due dates on when their AgLearn account becomes active, since they can't complete it until then, anyway.

31. Select a **Required Date Basis** of either **Assignment Date** or **Hire Date** when using event-based scheduling.

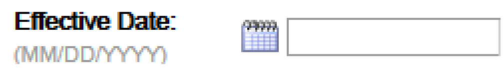
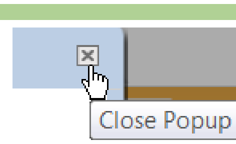
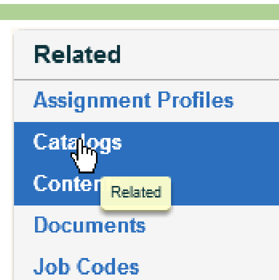
Assignment Date is the default.

Items with retraining intervals will not leave the user's To-Do List on completion; the Required By Date will change and the item will drop to or near the bottom of the list.

32. Set the **Retraining Assignment**, if needed. As with Initial Assignments, it's better to use Days as the period, even if that means a large number is required. (1095 days instead of three years, for example.)



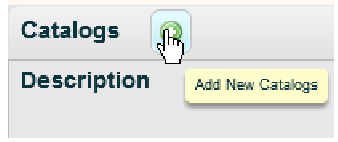
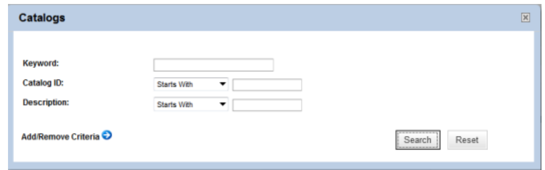
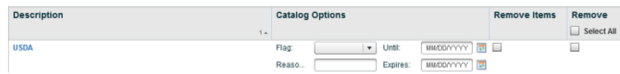
Add a New Curriculum (1411)

Step	Activity	View
33.	**Basis Date**s are primarily for calendar-based assignments. The default is acceptable unless you plan to make such an assignment, in which case Team AgLearn advises opening an ATAN ticket.	
34.	AgLearn will not hold users accountable for completing an assigned curriculum until after the **Effective Date**. Be sure to set this the current date or earlier or everyone will show as Complete on assignment.	
35.	Open the Assignment Type drop-down to select an Assignment type, if desired. The options are: • Legislatively Mandated • Optional • Recommended • Required	
36.	Click **Apply Changes.**	
37.	Close the pop-up window.	
38.	To include the curriculum in a catalog, click the **Catalog** tab in the **Related** area**.**	

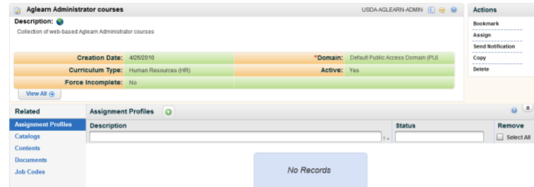
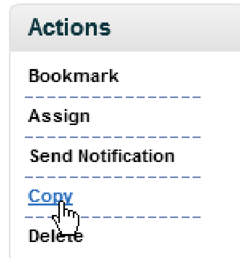
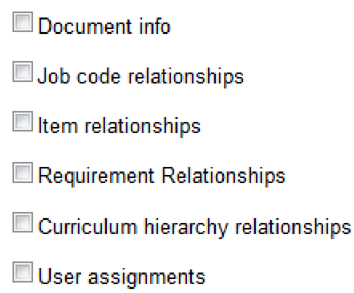
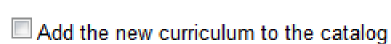
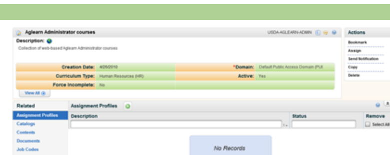
There is a reason the software allows this, but it does not apply to USDA and there is no way to disable it, Sorry.

Adding a catalog to the curriculum record allows users to search for it on their own. If this is to be a required curriculum and reporting is important, Team AgLearn advises not placing it in a catalog, as users who self-assign will skew the reporting.

Add a New Curriculum (1411)

Step	Activity	View
39.	Click the **Add**  icon.	
40.	Search for and add the catalog(s) in which the curriculum will appear.	
41.	Add flags and expiration dates as you would for an item.	

Copy a Curriculum Record (1411)

	Step	Activity	View
	1.	Open the record of the curriculum you wish to copy.	
	2.	Select the **Copy** link in the **Actions** menu.	
The same naming conventions apply as when creating a new curriculum.	**3.**	Enter a **New Curriculum ID.**	
	4.	Check the boxes as appropriate to copy the following data to the new curriculum: • Document info • Job code relationships • Item relationships • Requirement relationships • Curriculum hierarchy relationships • User assignments	
	5.	Check the **Add the new curriculum to the catalog** box to add the new curriculum to the catalog.	
	6.	Click **Copy**.	
The only difference between the original and copied Curriculum is the ID; appropriate edits are required.	**7.**	Review the new Curriculum record's data. Edit data as appropriate.	

Managing Curriculum Assignments (1411)

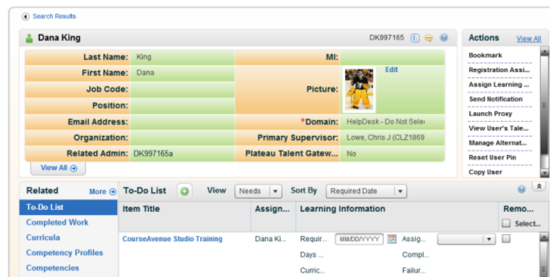
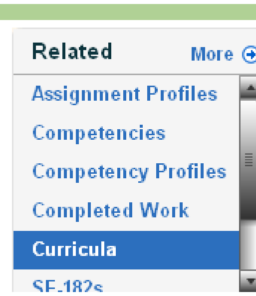
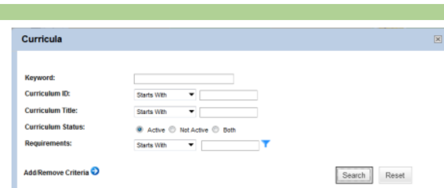
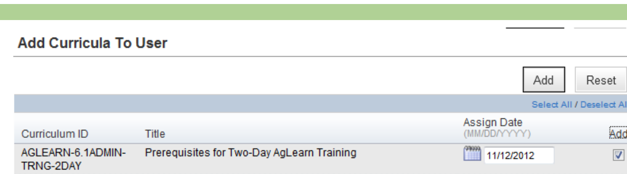
Assigning a curriculum to a single user is easiest through the Curricula area of the user's record. To assign curricula to multiple users, see the section in this toolkit for **User Needs Management**.

Note: Administrators can assign a single curriculum to one or more users through the curriculum record itself. In the Actions area, click Assign and AgLearn will take you directly to the User Needs Management tool, with the curriculum already loaded for assignment. Include any additional curricula at the appropriate step.

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

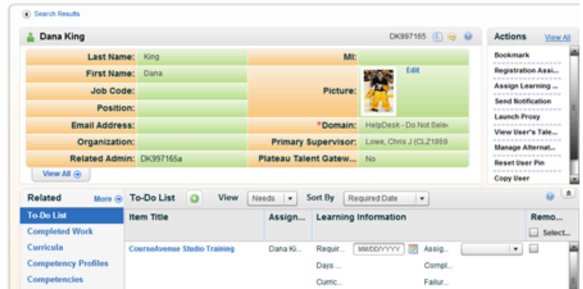
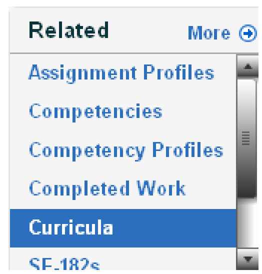
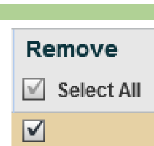
Assign a Curriculum to an Individual User's Record (6.4)

Assign curricula to multiple users with the User Needs Management wizard.

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Search for and open the record of the user to whom you wish to assign the curriculum.</td><td></td></tr>
<tr><td>2.</td><td>Select Curricula in the Related area.</td><td>
</td></tr>
<tr><td>3.</td><td>Click the Add New Curricula button.</td><td>
</td></tr>
<tr><td>4.</td><td>Search for the curriculum to add.</td><td>
</td></tr>
<tr><td>5.</td><td>Check the Add box for the curriculum or curricula to assign.</td><td>
</td></tr>
<tr><td>6.</td><td>Click Add.</td><td>
</td></tr>
</table>

Remove a Curriculum from an Individual User's Record (1411)

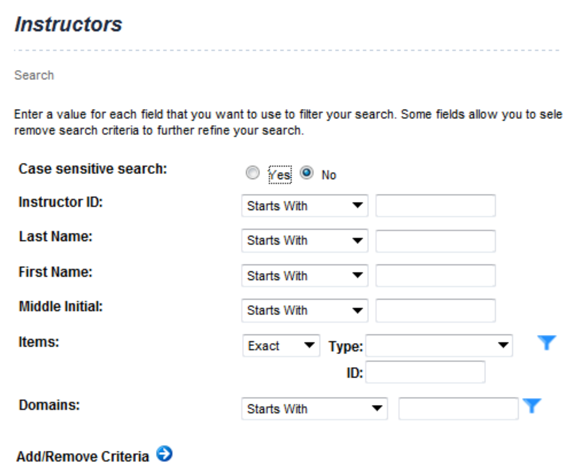
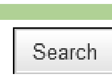
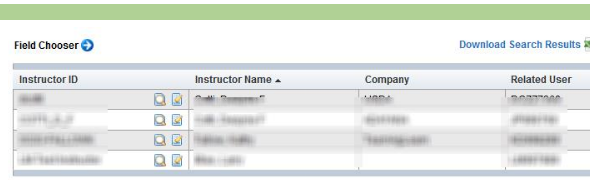
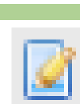
Remove curricula from multiple users with the User Needs Management wizard.

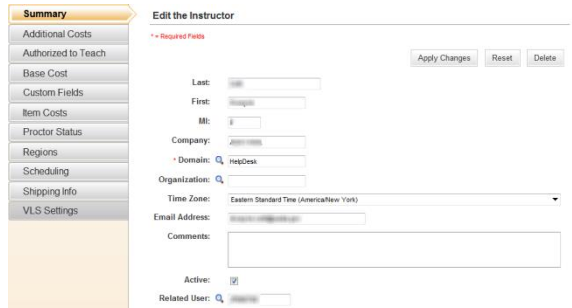
Step	Activity	View
1.	Search for and open the record of the user from whom you wish to remove the curriculum.	
2.	Select **Curricula** in the **Related** area.	
3.	Locate the curriculum you want to remove.	
4.	Check the **Remove** box for that curriculum or curricula.	
5.	Click **Save**.	

Managing Instructors (1411)

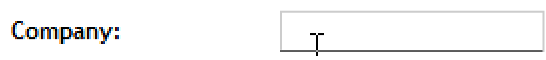
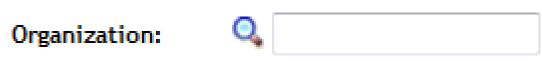
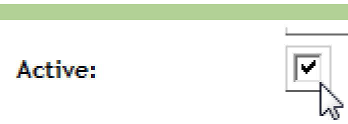
An instructor is any person who delivers learning. AgLearn tracks Instructors not only by name, location, and availability, but can keep records about which items an instructor is authorized to teach. Subtasks pertaining to **Managing Instructors** are accessible from the **Instructors** menu. **Managing Instructors** tasks include: **View**, **Add**, **Edit**, and **Add Authorized Items to Instructors**, and **Remove Authorized Items from Instructors**.

Search For and Edit an Instructor Record (1411)

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Select the Learning button.</td><td>
</td></tr>
<tr><td>2.</td><td>Select Instructors.</td><td>
</td></tr>
<tr><td>3.</td><td>On the > Search screen, enter the appropriate search criteria.
Note: See Managing Data Entry and Searches for more detailed information on searching.</td><td>
</td></tr>
<tr><td>4.</td><td>Click Search.</td><td>
</td></tr>
<tr><td>5.</td><td>On the Results screen, locate the desired instructor.</td><td>
</td></tr>
<tr><td>6.</td><td>Click the Edit icon on the same line as the instructor you want to edit.</td><td></td></tr>
</table>

7.	Make any necessary changes.	
8.	Click **Apply Changes** before exiting.	

Add an Instructor Record (1411)

Step	Activity	View
1.	Select the **Learning** button.	
2.	Select **Instructors**.	
3.	Select the **Add New** link.	
4.	Enter the **Instructor ID**	
5.	Enter the instructor's name.	
6.	Enter the instructor's **Company**, if known.	
7.	Click the **Domain** Selection icon to search for and enter a domain.	
8.	Click the **Organization** Selection icon to search for and enter an organization.	
9.	Enter the instructor's **Email Address**.	
10.	Enter any comments in the **Comments** field.	
11.	Select the **Active** check box if appropriate.	
12.	Click the icon to search for the **Related User**, if there is one.	

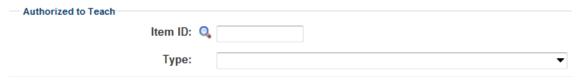
Be sure to use your agency's naming standard when creating any IDs.

Never leave any record in the PUBLIC domain.

Instructors who have AgLearn user accounts can have the two accounts linked in this manner.

Add an Instructor Record (1411)

Instructors authorized to teach an item will appear by default when searching for segment instructors.

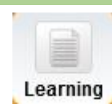
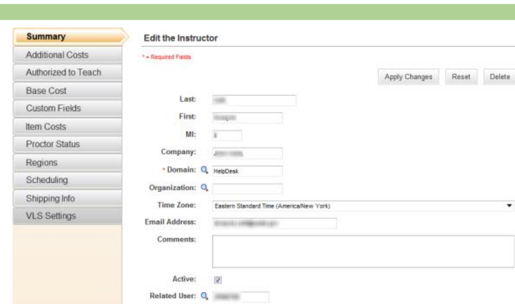
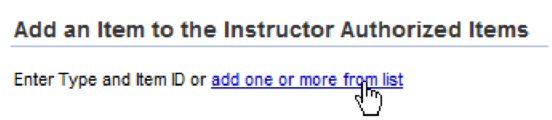
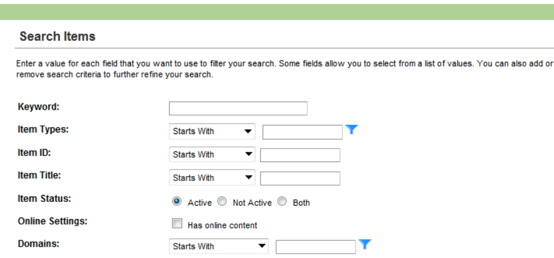
Step	Activity	View
13.	Click the icon next to **Item ID** to search for items the instructor is authorized to teach.	
14.	Click **Add**.	

Authorized Instructors (1411)

AgLearn provides the ability to designate certain instructors as authorized to teach specific items. There can be multiple instructors authorized to teach any item, and any instructor can be authorized to teach multiple items. Once an instructor is authorized to teach an item, their name will appear among the default choices when searching for instructors to teach a scheduled offering. Ad hoc selection of instructors is allowed on an offering-by-offering basis, but those previously authorized will be much easier to find.

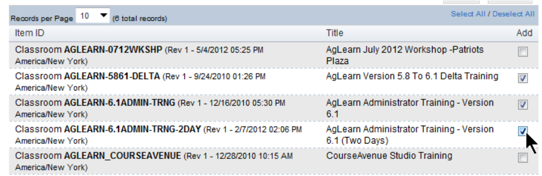
There are two ways to authorize instructors to teach specific items. You can open the instructor's record and add items—best when adding multiple items to the same instructor—or open the item record to add instructors, which works best for adding multiple instructor for the same item. If you need to add one item to a single instructor, both ways are as easy; personal preference rules.

Add Authorized Items to Instructors Through the Instructor's Record (1411)

Step	Activity	View
1.	Select the **Learning** button.	
2.	Search for and open the record of the instructor you want to authorize to teach the item or items.	
3.	Click **Authorized to Teach.**	
4.	Select the link to **add one or more from list.**	
5.	Search for the item or items as you would at any time.	

For help with searches, see the section titled, "Managing Data Entry and Searches."

6. Check the **Add** boxes for the items the instructor is authorized to teach.

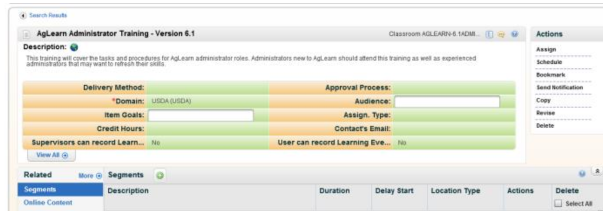
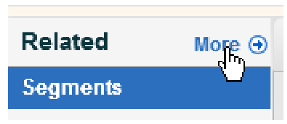
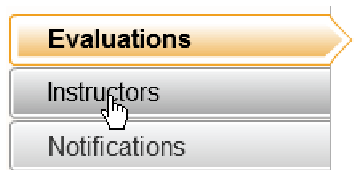
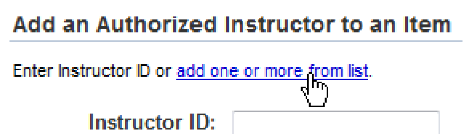
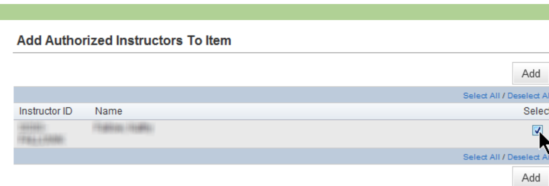

Records per Page 10 (6 total records) Select All / Deselect All

Item ID	Title	Add
Classroom **AGLEARN-0712WKSHP** (Rev 1 - 5/4/2012 05:25 PM America/New York)	AgLearn July 2012 Workshop -Patriots Plaza	☐
Classroom **AGLEARN-5861-DELTA** (Rev 1 - 9/24/2010 01:26 PM America/New York)	AgLearn Version 5.8 To 6.1 Delta Training	☑
Classroom **AGLEARN-6.1ADMIN-TRNG** (Rev 1 - 12/16/2010 05:30 PM America/New York)	AgLearn Administrator Training - Version 6.1	☑
Classroom **AGLEARN-6.1ADMIN-TRNG-2DAY** (Rev 1 - 2/7/2012 02:06 PM America/New York)	AgLearn Administrator Training - Version 6.1 (Two Days)	☑
Classroom **AGLEARN_COURSEAVENUE** (Rev 1 - 12/28/2010 10:15 AM America/New York)	CourseAvenue Studio Training	☐

7. Click **Add**.

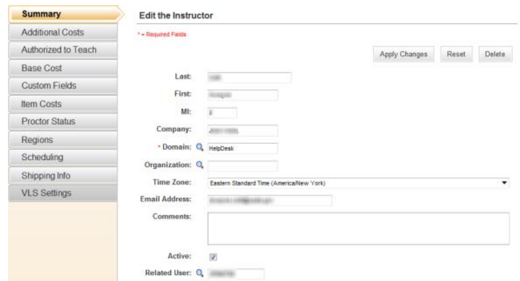
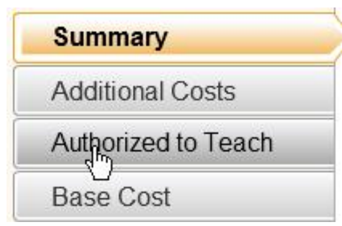
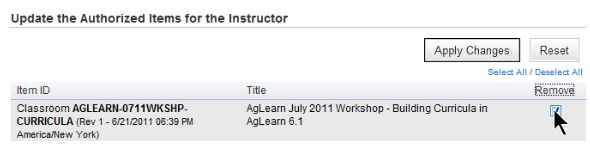
For help with searches, see the section titled, “Managing Data Entry and Searches.”

Add Authorized Items to Instructors Through the Item’s Record (1411)

Step	Activity	View
1.	Search for and open the record of the item for which you want to authorize an instructor.	
2.	Select the **More** link in the **Related** area.	
3.	Click **Instructors**.	
4.	Select the **add one or more from list** link, then search for the instructor you want to authorize to teach this item.	
5.	Check the **Select** box for the instructor to add.	
6.	Click **Add**.	

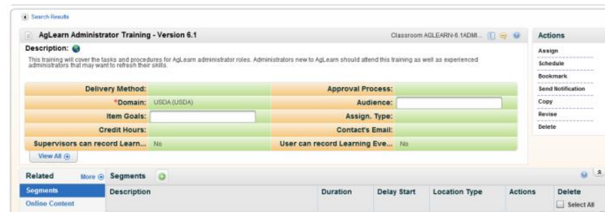
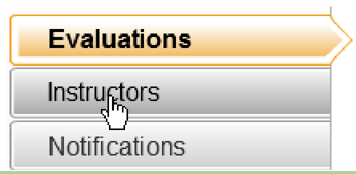
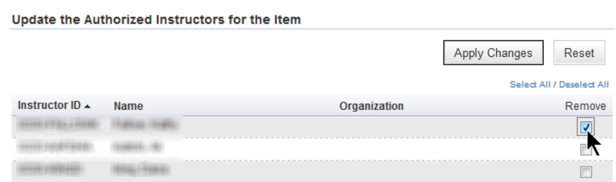
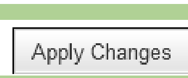
Remove Authorized Items to Instructors Through the Instructor's Record (1411)

For help with searches, see the section titled, "Managing Data Entry and Searches."

Step	Activity	View
1.	Select the **Learning** button.	
2.	Search for and open the record of the instructor no longer authorized to teach the item or items.	
3.	Click **Authorized to Teach.**	
4.	Click the **Remove** check box for the item or items to remove.	
5.	Click **Apply Changes.**	

For help with searches, see the section titled, "Managing Data Entry and Searches."

Remove Authorized Items from Instructors Through the Item's Record (1411)

Step	Activity	View
1.	Search for and open the record of the item from which to remove the instructor's authorization to teach.	
2.	Select the **More** link in the **Related** area.	
3.	Click **Instructors**.	
4.	Check the **Remove** box for any instructors whose authorizations are to be removed	
5.	Click **Apply Changes**.	

Managing a Facility Record (1411)

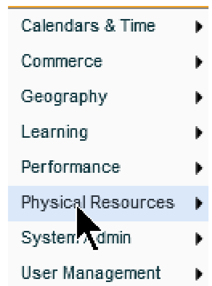
A facility can be a building (Whitten) or a complex (BARC); its purpose is to provide a logical grouping of “locations” where training takes place. In order to guard against the creation of duplicate facilities, submit all requests to add or edit the properties of a facility to Team AgLearn for completion. The directions below are for searching for and viewing a facility record, so you can see what changes to request.

Search For and View a Facility Record (1411)

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

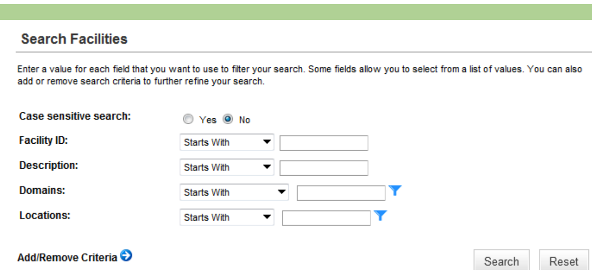
1. Click the **References** button.

2. Hover your mouse over **Physical Resources** in the drop-down menu.

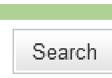


3. Select **Facilities** from the resulting drop-down menu.

4. Enter the search parameters for the facility you wish to view.

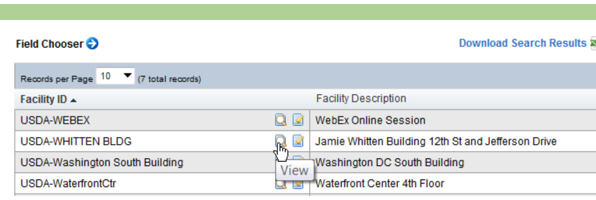


5. Click **Search**.



6. Click the **View** icon for the facility you want to look at.

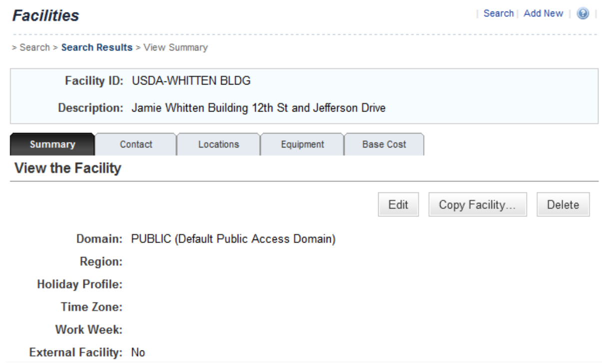
The View icon is the only one you’ll see, as the Edit function is unavailable.



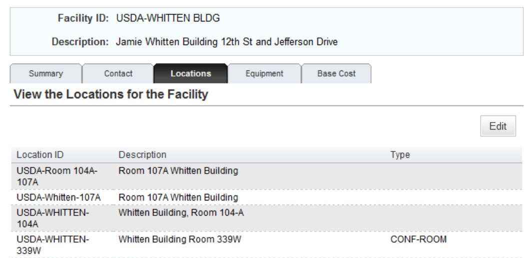
Few, if any, facilities track Equipment or Base Costs.

7. The facility record opens.

Click any tab to display more specific information.



8. For example, clicking the **Locations** tab displays a list of all of the locations in this facility.

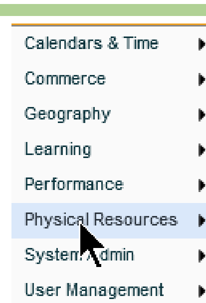
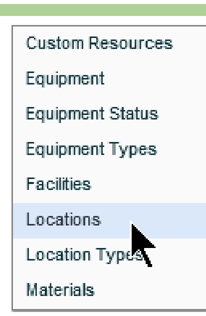
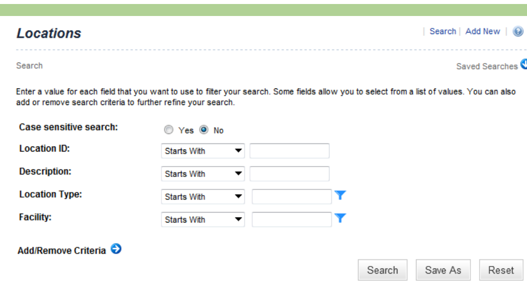
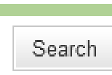


Managing a Location Record (1411)

A location is a specific place within a facility. Locations can be anything from classrooms and simulators to barns and fields. In order to guard against the creation of duplicate locations, submit all requests to add or edit the properties of a location to Team AgLearn for completion. The directions below are for searching for and viewing a location record, so you can see what changes to request.

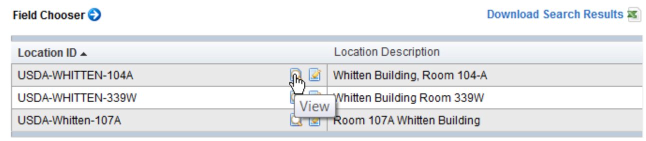
Note: No agencies are using AgLearn to track the scheduling of their locations and facilities. Assigning locations and facilities allows AgLearn to provide information on them to users when it sends registration confirmation e-mails, nothing more.

Search For and View a Location Record (1411)

Step	Activity	View
1.	Click the **References** button.	
2.	Hover your mouse over **Physical Resources** in the drop-down menu.	
3.	Select **Locations** from the resulting drop-down menu.	
4.	Enter the search parameters for the location you wish to view.	
5.	Click **Search**.	

The View icon is the only one you'll see, as the Edit function is unavailable.

6. Click the **View** icon for the location you want to look at.



Few, if any, locations track Equipment, Base Cost, or Additional Costs.

7. The location record opens. Click any tab to display more specific information.