LEARNING MANAGEMENT SYSTEM (LMS)
AGENCY ADMINISTRATOR USER GUIDE

Table of Contents

Learning Administration: Home Page Overview ......................................................... 1
Learning Administration: Users Page Overview ......................................................... 3
Learning Administration: Learning Page Overview ..................................................... 4
Learning Administration: Content Page Overview ...................................................... 7
Learning Administration: System Admin Overview ..................................................... 8
Searching and Viewing Employee Records ................................................................. 9
Create an Assignment Profile ..................................................................................... 12
Utilizing the Users-Tools Menu .................................................................................. 19
Create a Group ............................................................................................................ 25
Import Content: Add New Content ............................................................................. 28
Import Content: Add Content for an Existing Item ...................................................... 31
Import Content: Replace Content for an Existing Item ................................................. 34
Content: Printed Exam Templates .............................................................................. 37
Adding Learning Documents ...................................................................................... 38
Create an Item ........................................................................................................... 41
Create an Online Course ............................................................................................ 48
Create a New Scheduled Offering .............................................................................. 54
Create a Blended Course .............................................................................................. 61
Create an ‘Other Item’ ................................................................................................. 68
Adding Assessments ................................................................................................... 71
Create a Class ............................................................................................................. 77
Create a Group Instance ............................................................................................. 80
Create a Catalog .......................................................................................................... 82
Create a Program ......................................................................................................... 87
Create a Curricula ......................................................................................................... 91
Create Requirements ................................................................................................... 96
Create Questionnaire Surveys .................................................................................... 100
Adding External Links ............................................................................................... 104
Adding Collections ..................................................................................................... 107
Create Tasks .............................................................................................................. 110
Learning Tools Menu .................................................................................................. 113
Reports Overview ....................................................................................................... 117
Learning Administration: Home Page Overview

Introduction
This user guide contains information about key features of the People First Learning Management System (LMS), Learning Administration. The below section provides an introduction and overview on the key functionality within the Home Page of the Learning Administration page.

Getting Started
Follow the path to access the Learning Administration Home Page.

Your path is...
People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration

Home Page Overview

Home icon appears in the header of each page and, if selected, returns you to the Talent Management Home page.

Account navigation dropdown menu appears in the header of each page and displays the logged in user's name and People First Login ID. Selecting the dropdown menu, allows you to log out.

Home button appears in the top menu section of each page. If selected, returns you to the Learning Administration home page, where you can access your administrator Quick Links for administrator tools you use frequently.
Users button appears in the top menu section of each page. Selecting this link takes you to the Users page where you can perform search for and edit learner’s information, create and search for assignment profiles and create and search for groups (slots).

Learning button appears in the top menu section of each page. Selecting this link takes you to the Learning page where you can create and search for learning items (courses), curricula and programs.

Content button appears in the top menu section of each page. Selecting this link takes you to the Content page where you can perform load content and create assessments.

System Admin button appears in the top menu section of each page. Selecting this link takes you to the System Admin page where you can configure certificate templates and review any scheduled background jobs.

References button appears in the top menu section of each page. Selecting this link allows you to search for global references that will be displayed to learners and administrators and allows you to create physical resource for Facilities and Locations.

Reports button appears in the top menu section of each page. Selecting this link allows you to process administrator reports.

Search bar appears in the top menu section of each page. You can enter keywords or commands into the search bar. Note: This feature will be removed in January 2020.

Preferences icon appears in the top menu section of each page. Selecting this link allows you to modify your time zone (default time zone is Eastern).

Choose a different layout icon allows you to select the layout for your Learning Administration home page. Changing this selection will only impact your default view and will not impact other administrators in your agency.

Help icon is presented throughout the administrator pages and takes you to SuccessFactors content that includes information on what each learning function is and general information on how to use them. This should be your first stop for help as an administrator!

Quick Links section appears in the bottom section of the home page. In this section, you can create your own quick
Learning Management System: Learning Administrator User Guide

Quick Links

links for actions you frequently use. Changing this selection will only impact your default quick links and will not impact other administrators in your agency.

Learning Administration: Users Page Overview

Introduction

When it's time to perform user-related tasks such as searching for users, creating and search for assignment profiles, creating and searching for groups and running user-related tools you will select the Users tab in Learning Administration. The below section provides an introduction and overview of the key functionality within the Users Page of the LMS. Details on each functionality are covered later.

Getting Started

Follow the below path to access the Users Page:

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Users button

Users Page Overview

Below is an overview of the Users Page:

Users tab appears in the tab menu on the Users page and allows you to search for employees within your agency. After selecting an employee, you can view the employee’s details, view the employee’s related learning items and perform learning-related actions (assign learning, change due dates, etc.) on the employee.

Assignment Profiles tab appears in the tab menu on the Users page. An assignment profile is a set of rules used to assign learning items based on employee attributes. Use this tab to create and search for existing assignment profiles.

Tools tab appears in the tab menu on the Users page. Selecting this tab displays user-related tools that allow you to administer learning.
Groups tab appears in the tab menu on the Users page. You can reserve slots in training for specific employees with learning groups. Use this tab to create new groups and search for existing groups.

Learning Administration: Learning Page Overview

Introduction
When it is time to create or search for a learning item, administrators will select the Learning button in the top menu section of each page. The below section will give an introduction and overview of the key functionality within the Learning Page of the LMS. Details on each functionality are covered later.

Getting Started
Follow the path to access the Learning page.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button
Below is an overview of the key functionality in the Learning Page.

**Items tab** appears in the tab menu on the Learning page. Selecting this tab allows you to search for and create items (e.g., Scheduled Only, Online Only, Scheduled and Online, or Other) within your agency.

**Scheduled Offerings tab** appears in the tab menu on the Learning page. A scheduled offering is an instructor led class instance of a Scheduled Only course that has a specific start and end time. Selecting this tab will allow you to search for and create scheduled offerings.

**Classes tab** appears in the tab menu on the Learning page. The word “Class” refers to “Graduation Groups.” Selecting this tab allows you to search for and create groups of learners who will take a common set of classes together, leading to a graduation ceremony.

**Group Instances tab** appears in the tab menu on the Learning page. Selecting this tab allows you to search for and create a set of classes that have the same traits (e.g., scheduled offerings that you own, scheduled offerings in the location, etc.). This is an administrator tool only that allows administrators to view classes in certain groupings.

**Catalogs tab** appears in the tab menu on the Learning page. Catalogs allow employees to search for and self-assign courses. Selecting this tab allows you to search for and create catalogs that you will use to publish training for learner registration.

**Programs tab** appears in the tab menu on the Learning page. Programs are defined as a syllabus of courses that walk users down a learning path. Selecting this tab allows you to search for and create programs.

**Curricula tab** appears in the tab menu on the Learning page. Curricula is defined as a set of one or more courses that employees must successfully complete to remain qualified for a standard set by your agency or a regulatory body. Selecting this tab allows you to search for and create curriculum.

**Requirements tab** appears in the tab menu on the Learning page. Requirements are defined as a set of conditions that employees must meet to receive a complete curricula status when you create a requirement-based curricula. Selecting this tab allows you to search for and create requirements.

**Questionnaire Surveys tab** appears in the tab menu on the Learning page. Questionnaire Surveys are defined as an assessment that gathers employee feedback for completed courses. Selecting this tab allows you to search for and create questionnaire surveys.
Instructors tab appears in the tab menu on the Learning page. Selecting this tab allows you to search for instructors. Note: Requests for adding instructors must go through People First.

External Links tab appears in the tab menu on the Learning page. Administrators can use this tab to set up links to content that is not stored within the LMS.

Collections tab appears in the tab menu on the Learning page. A collection is defined as a group of web sites (i.e., External Links) that you want to recommend to employees, which will appear in the employee’s Recommendations tile. Selecting this tab allows you to search for and create collections.

Tasks tab appears in the tab menu on the Learning page. A task is a learning activity that you will assign to an employee to perform in front of an observer. You can use the tasks to create a task checklist. Selecting this tab allows you to search for and create tasks.

Tools tab appears in the tab menu on the Learners page. Selecting this tab will display learning-related tools such as: Close Scheduled Offering, Cancel Scheduled Offering, Curriculum Scheduling, Registration Assistant, Required Dates Editor, Scheduled Offering Notification and Activate/Deactivate Content Network.
Learning Administration: Content Page Overview

Introduction
When it is time to search, view, and import content to be associated with a course, the content page will be utilized. Course content is not created within this page, rather it is created using an external course authoring tool, such as Articulate Storyline. Details on each functionality are covered later.

Getting Started
Follow the path to access the Content page.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Content button

Content Page Overview
Below is an overview of the Content Page:

Content Objects tab appears in the tab menu on the Content page and allows you to search for and view details for individual content objects that are not AICC/SCORM compliant, e.g., documents. This is a view only page.

Content Packages tab appears in the tab menu on the Content page. This is a view only tab and allows administrators to search for and view content that is SCORM/AICC compliant.

Assessments tab appears in the tab menu on the Content page. Selecting this tab will allow you to create quizzes and exams that you can associate with courses (items).

Objectives tab appears in the tab menu on the Content page. Allows you to create training goals that you can associate with courses (items).

Questions Library tab: Legacy function tied to exams and should not be used. Utilize the Assessments page to create questions.
Tools tab appears on the content page tab. This tab, along with its sub-contents allows users to import pre-made content, edit printed exam templates, and import questions.

Documents tab appears in the tab menu on the Content page. Allows users to create document items that link to external content (internet). Documents can be linked to a course.

Learning Administration: System Admin Overview

Introduction
When it is time to manage learning items and performance, administrators will select the System Admin button in the top menu section of each page. The below section provides an introduction and overview on the key functionality within the System Admin page.

Getting Started
Follow the path to access the System Admin page.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > System Admin button

System Admin Page Overview
Below is an overview of the key functionality in the System Admin Page

Certification Templates: Allows administrators to create custom completion certificates for use in your agency’s training (courses or curricula).

Tools has subcategories, which are AICC Import and Legacy SCORM Import: Legacy features which are not used.

Background Jobs tab: Allows you to search for jobs your agency administrators have ran within the LMS (e.g., uploading content.)
Now, this guide will transition into specific functionality and step-by-step processes that you will most likely perform in your role as a Learning Administrator.

**Searching and Viewing Employee Records**

**Introduction**

One of the functions within the Users Page is the ability to search for learners) within your agency and view their training history and additional functionality. The below sections outline how to search and view a learner’s record.

**Getting Started**

*Your path is…*

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Users button > Users tab > Search

**Process Overview**

Follow the steps below to search for and view an employee record:

**Steps:**

1. Select the Users button.

2. Once you select the Users button, the system will default to the Users tab.

3. Enter in employee’s information in one of the search fields. Administrators can Add/Remove search criteria or set additional filters for applicable fields.

**Tips for successful searches:**

- When using the User ID to search for an employee, the employee’s 8-digit People First Login ID must be used, including the leading zero(s). For example, if the employee’s People First Login ID is 123456, then you would enter 00123456.

- When searching for an external user, utilize the External ID field.
4. Select Search.

5. Once the user’s information is populated, select the User ID link to view the learner record.

6. The learner’s record will be presented along with various menu options that will allow you to perform various learning tasks on the learner.

7. The Related Menu, located in the bottom left of the user’s profile, provides administrators with a variety of options:

   **Assigned Items**: Provides administrators with a view of trainings currently assigned to the respective user and the ability to modify the learning item due dates and add additional training (☐) to the learner.

   **Items Completed**: Provides administrators with a view of trainings that have been completed by the learner; which
includes training that was mass loaded into the system at go-live.

**Curricula**: View curricula that are currently assigned to the user as well as add a curricula for the specific use (use the green plus to add training (➕)).

**Programs**: View programs that are currently assigned to the learner. Programs must be added in the program, they cannot be added to a learner here.

**Assignment Profiles**: View the assignment profiles the learner is assigned to.

8. The Actions Menu located at the top right of the user’s profile provides administrators with a variety of options. Some of which are view only.

- **Registration Assistant**: Applies only to classroom trainings. Allows administrators to remove the user from a training, reserve a slot in a training, and register the user for a training
- **Assign Learning**: Applies only to online trainings. Allows administrators to assign or remove training, curricula and programs to users.
- **Send Notifications**: Allows administrators to create and send emails to users.
- **Launch Proxy**: Allows administrators to proxy in as the user. Proxying grants view-only access, it does not allow the administrator to complete the training for the user.
Create an Assignment Profile

Introduction
Assignment profiles allow you to systematically assign required learning items based on an employee's attributes. To create an assignment profile, follow the steps outlined below.

Getting Started
Follow the below path to create an assignment profile:

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Users button > Assignment Profiles tab > Add New

Process Overview
To create an assignment profile:

Steps:
1. Select the Users button.
2. Select Assignment Profile tab.
3. Select Add New.
4. Complete the basic information about the assignment profile as outlined below:
   - Assignment Profile ID: Create a unique assignment profile ID. Remember to start the ID with your agency acronym (e.g., DMS, DCF, etc.) then complete the ID with relevant information as to easily identify who is included in the profile. Make sure to follow your agency’s naming conventions.
Description: An optional field, but highly recommended. This field allows administrators to further describe what the assignment profile is being created for.

Domain: Required field. The default domain is Public. This field must be updated to your agency acronym. If you do not update the domain, the assignment profile will not work.

Email: An optional field, where you may enter your email address identifying yourself as the owner of the assignment profile.

Created For: An optional field, where you may enter your name so other administrators in your agency can identify the creator of the assignment profile.

Notes: You may use this field to further describe the assignment profiles' purpose and who is included in the profile.

Assignments Profiles

5. Select Add.

6. Add Rules: Rules are used to identify the users to include in the assignment profile.

Outlined below:

a. Select Manage Rules.

b. Select Add Domain(s).

c. Enter Your Agency Acronym in Keyword Field and Search:

Enter the rule name under Set Up Rules.
e. Select an Attribute (Note: Some attributes are not valid for use. Specifically, Alternate Job Code ID, fields labeled CustomColumnRow* and fields labeled For Federal User Connector Use Only should not be used.):

f. Select an Operator:

Note: Select the desired operation to further drill down your population. Not all operators are applicable for each attribute. For example:

- **Matches**: Not for Hire Date/Month, Item Completion, and Is Full-Time
- **Between**: For Hire Date Only.
- **Contains**: Used for text-based fields, not for Hire Date/Month, Item Completion, or Is Full-Time.
- **Is Empty**: Not for Hire Month, Item Completion, and Is Full Time.
- **Equals**: Not for Hire Month, Item Completion, and Is Full Time.
- **Includes Sub Records of**
- **Starts with**: Not for Hire Month, Item Completion, and Is Full Time.
- **Does not Match**: Not for Hire Month, Item Completion, and Is Full Time.
- **Does not Contain**: Not for Hire Month, Item Completion, and Is Full Time.
- **Is Not Empty**: Not for Hire Month, Item Completion, and Is Full Time.
- **Does not Equal**: For Hire Date and Item Completion only.
- **Does not Start With**: Not for Hire Month, Item Completion, and Is Full Time.
- **On or After**: For Hire Date only.
- **On or Before**: For Hire Date only.
Include Indirect Reports of

Additional rules can be added using the same process above and will link the rules together by using an “And/Or” statement.

g. If you would like to add additional information to your rules, utilizing an “And” statement, select Add Rule. Using Add Rule will narrow down your selection and requires that both the original rule and the new rule be met for the learner to be included in the assignment profile.

h. If you would like to add additional information to your rules, utilizing an “Or” statement, select Add a New Group. Using Add a New Group will expand your selection and result in additional learners being included in your assignment profile. Learners must only meet one of the rules to be included if using this option.

i. Once you have completed setting up your rule(s), save the rule.

j. You may preview users appearing in the Assignment Profile, by selecting Preview Users in Assignment Profile. When here, you can modify the fields you wish to view by selecting ‘Field Chooser’.

8. Assign Relationships to the assignment profile. Use the Related Menu to assign learning items to an assignment profile. Below are the various options that can be related to an assignment profile.

- **Catalogs**: If the assignment profile is tied to a specific catalog (used to publish courses for learner self-registration), then select the green plus and add the related catalog.

- **Curricula**: If the assignment profile is being used for a curricula, then add the related curricula.

- **Items**: If the assignment profile is used for specific courses, then add the related courses.

- **Programs**: If the assignment profile is being used for a program, then add the related program.

- **Groups**: If a group will be used to reserve slots when the assignment profile is used, then add the related group.

8. Apply the rules and relationships (propagate) to the newly create assignment profile. To do this select Propagate under the Actions Menu.
Actions

Propagate

Note: You only need to propagate once when the rule is created or when changes to the rule are made, or you assign an additional course to the assignment profile. A batch job runs nightly to reapply the rules and relationships to capture newly eligible users and remove users who are no longer eligible.

9. Run this job (propagate) immediately (recommended) or set the option to Schedule this job.
   - Run this job immediately, if allowable.
   - Schedule this job to be executed on: View Available Time Slots

Update the Email field or uncheck the Notify via email upon completion checkbox.

Select Finish
   Finish

10. Use the Actions Menu to perform additional assignment profile related actions.

Propagate: Select this action when you have created or edited an assignment profile.

Synchronize: Not applicable.

Copy: Select this action to use an existing assignment profile as a template for a new assignment profile.

Delete: Select this action to delete an assignment profile that has never been used/propagated. Deleting any record is typically reserved for development only and should not be used if courses, curricula or programs have been assigned to the assignment profile.

Manage Rules: Select this action to manage the rules of an assignment profile to determine which employees are added to the assignment profile.

Deactivate: Select this action to inactivate an assignment profile that you no longer want to use. This does not delete the profile, and the assignment profile can be activated again.

Existing Users in Assignment Profile: Select this action to view employees who meet the assignment profile rules.

The below list outlines the attributes listed in the dropdown, what data they pull, and the best operators to use when searching by that attribute. Also, not all attributes are used in this system.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description of Attribute Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>The physical building address that is assigned to the employee’s position in People First. For example: 4050 Esplanade Way.</td>
</tr>
<tr>
<td>Agency</td>
<td>Field not used as an agency-wide assignment profile has already been created.</td>
</tr>
<tr>
<td>Field Description</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Alternate Job Code ID</td>
<td>Field is not used.</td>
</tr>
<tr>
<td>Appointment Status</td>
<td>Appointment status description such as probationary or exempt.</td>
</tr>
<tr>
<td>Helpful Hint</td>
<td>Use the operator “Matches” and the search picker to pull up the types of appointment statuses that are available.</td>
</tr>
<tr>
<td>Appointment Status Effective Date</td>
<td>Effective date of the appointment status.</td>
</tr>
<tr>
<td>CBU</td>
<td>Collective Bargaining Unit. This is associated with the unit number.</td>
</tr>
<tr>
<td>Helpful Hint</td>
<td>Use the operator “Matches” and use the search picker to select the CBUs.</td>
</tr>
<tr>
<td>City</td>
<td>Enter a city to include all users in an assignment profile that are based in that city (based on the location address city in People First).</td>
</tr>
<tr>
<td>Class Code</td>
<td>The four-digit class code associated with the position, including any leading zeros. For example, Class Code 0108.</td>
</tr>
<tr>
<td>Class Title</td>
<td>The official class title of the position, not the working title.</td>
</tr>
<tr>
<td>Helpful Hint</td>
<td>When using class title as an attribute, enter the title using ALL CAPS.</td>
</tr>
<tr>
<td>Employee Status ID</td>
<td>Field is not used.</td>
</tr>
<tr>
<td>Employee Type ID</td>
<td>Use to filter by type of employee. For example, Career Service, SES, OPS, etc.</td>
</tr>
<tr>
<td>Helpful Hint</td>
<td>Use the operator “Matches” and the search picker to pull up all employee type IDs that are available.</td>
</tr>
<tr>
<td>FLAIR Org Code</td>
<td>Use to capture all employees who are associated with a specific 11-digit FLAIR Org Code. You do not have to input the entire org code if you use the operator “starts with” or “contains”.</td>
</tr>
<tr>
<td>Hire Date</td>
<td>Agency hire date. Note: This does not capture OPS employees.</td>
</tr>
<tr>
<td>Is Full-Time</td>
<td>Pulls only full-time employees. This rule is a yes/no only option.</td>
</tr>
<tr>
<td>Is Supervisor</td>
<td>Pulls only supervisors based on the employee having one or more direct reports. This is a yes/no only option.</td>
</tr>
<tr>
<td>Item Completion</td>
<td>Allows admins to create an assignment profile based on certain items (courses) that have or have not been completed. Use the search picker to search for the item.</td>
</tr>
<tr>
<td>Job Code ID</td>
<td>Field is not used.</td>
</tr>
<tr>
<td>Job Location ID</td>
<td>Field is not used.</td>
</tr>
<tr>
<td>Org Code Description</td>
<td>A description of the Org Code. Helpful Hints: Unless you know the exact org code name, use the operator ‘Starts With’ or ‘Contains’ and type the description in ALL CAPS.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Organization ID</td>
<td>Use to capture all employees who are associated with a specific 24-digit Org Code. You do not have to input the entire org code if you use the operator “starts with” or “contains”.</td>
</tr>
<tr>
<td>Position Number</td>
<td>Enter the position numbers of the user you want to include in the assignment profile. You must enter the exact 8-digit number or use the operator ‘Starts With’.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Enter a Zip Code to include all users in an assignment profile that are based in that Zip Code (based on the location address Zip Code in People First).</td>
</tr>
<tr>
<td>Region ID</td>
<td>Field is not used.</td>
</tr>
<tr>
<td>Regular or Temp</td>
<td>Field is not used.</td>
</tr>
<tr>
<td>State</td>
<td>Enter a state abbreviation to include all users in an assignment profile that are based in that state (based on the location address city in People First). Must input using the two-letter state abbr., for example, FL.</td>
</tr>
<tr>
<td>Supervisor ID</td>
<td>Create an assignment profile by looking up certain supervisors. Use the operator “Matches” and the search picker to search for the supervisor.</td>
</tr>
<tr>
<td>User ID</td>
<td>Create an assignment profile by looking up specific users in the system. Use the operator “Matches” and the search picker to search for the users you wish to target.</td>
</tr>
</tbody>
</table>
Utilizing the Users-Tools Menu

Introduction

There are several tools that you can use to perform user-related actions. To use the tool(s) follow the below path. This section provides an overview of the tools and their respective functionalities.

Getting Started

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Users button > Tools tab

Tools Overview

The below section outlines each option within the Tools Menu and the function that it performs.

Record Learning - Multiple

This wizard is to record learning history for multiple users for one or more items, schedule items, scheduled offerings or external event to be recorded for each, and specify the user.

What kind of learning you want to record?

- Item
- Scheduled Offering
- External Event

Search & Add Items

* Item Type ID:

Record Learning-Multiple: Allows administrators to record course completion for users in bulk, when the completion is not being recorded in the course itself.

1. Go to Learning Administration and then go to Users > Tools > Record Learning – Multiple.
2. Select the type of learning event to record: Item; Scheduled Offering; External Event.

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

3. In Search & Add Items or Search & Add Scheduled Offerings: Find the courses or the classes that learners completed, and then select Add.

   **Search & Add Items**

   * = Required Fields

   - **Item Type ID:**
     - COURSE

   **List of Selected Items**

<table>
<thead>
<tr>
<th>Item</th>
<th>Title</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>COURSE</td>
<td>Meerkat (Rev 1 - 6/25/2019 07:32 AM America/Chicago)</td>
<td></td>
</tr>
</tbody>
</table>

4. Search & Add Users: Find the learners who completed the events, and then select Add. Make sure to include the leading zero(s) when searching by User ID.

   **Search & Add Users**

   - **User ID:**

5. Edit details for each person for each course, and then select Apply Changes to save your changes.

6. Select to add the instructor who taught the course.

7. Select Next.

8. Change the Way Competencies are Assessed: Select Do Not Assess, as we are not creating competencies within the LMS.

   **Change the way competencies are assessed**

   - Do Not Assess

9. Select Submit

**Learning Event Editor:** This feature allows administrators to edit the completed course record for users.

1. Select Learning Event Editor in the Tools Menu.
2. Search for the User who you are editing the event on behalf of.

```
Learning Event Editor

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

Case sensitive search: Yes
Search All Locales: Yes
User ID: Starts With
Description: Starts With
Completed Date After: (MM/DD/YYYY)
Completed Date Before: (MM/DD/YYYY)
Type of Learning Event: Items External Events Program All

Add/Remove Criteria
```

3. Select the course that you would like to edit on behalf of that user.

```
<table>
<thead>
<tr>
<th>User Name</th>
<th>ID</th>
<th>Description</th>
<th>Completion Date</th>
<th>Completion Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandakunis, Briana G</td>
<td>COURSE DMS-LH-365 (Rev 1 - 1/2/2005)</td>
<td>DMS - Sexual Harassment</td>
<td>12/29/2017 12 00</td>
<td>Completed</td>
</tr>
</tbody>
</table>
```

4. Update the fields as necessary.

```
Edit the Learning Event

Instructor ID: 
Instructor Name: 
Grade: 
Completion Status: COURSE-C (Completed) - For Credit
Completion Date: 02/29/2017
Completion Time: 12:30 AM
Time Zone: Eastern Standard Time (America/New York)
CPE: 
Contact Hours: 
```

5. Select Apply Changes.

```
Apply Changes
```

**Send Notifications:** Allows administrators to create an email and send to selected users.

1. Select ‘Send Notifications’ tab in the Tools Menu.

```
Send Notifications
```

2. Select the criteria type then Next.
3. Search for the course or offering that you would like to send a notification to users regarding, then select Next.

<table>
<thead>
<tr>
<th>Scheduled Offering ID</th>
<th>Item/Schedule Block</th>
<th>Description</th>
<th>Start Date/Time</th>
<th>End Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>223</td>
<td>COURSE DMS_Supervisor_Basics</td>
<td>Training Location: 10/11/2019 10:00 AM</td>
<td>10/11/2019 12:00 PM</td>
<td></td>
</tr>
</tbody>
</table>

4. Refine the user population according to registration and completion status:

- **Registration Status:**
  - All Statuses
  - Cancelled
  - Active Enrollment
  - Pending
  - Waitlisted

- **Completion Status:**
  - All Statuses
  - COURSE-C (Completed)
  - PROGRAM-C (Completed)
  - COURSE-P (Incomplete)
  - COURSE-N (No Show)

5. Enter login ID of user(s) and select Next.

6. Build email as applicable. Either select a template within the system or create a notification.
   **Note:** There is an option to customize notifications, but it requires a significant amount of html coding knowledge.

   * = Required Fields

| Step 5: Build Email |

7. Send Notification.

   Send Notification

__User Needs Management:__ Only applies to online based content. Allows you to assign or remove training, curricula and programs to users. You can use this for one or multiple users at one time.

1. Select User Needs Mgmt. in the Tools Menu.

2. Select the Management Action, then select Next.

   **Step 1: Select Management Action**

   - Add Curricula
   - Add Items
   - Add Job-related Curricula
   - Add Programs
   - Remove Curricula
   - Remove Items
   - Remove Surveys
   - Remove Programs

3. Search for and add the user(s) who you would like to perform the action on.

4. Search for and select the online based content you are seeking to add or remove.
5. Edit Assign Dates, if applicable.

6. Select ‘Run Job Now’.

Run Job Now

**External Requests**: This feature is not used.

**Recommended External Links**: Allows administrators to send pre-configured useful websites to learners.


2. Choose from the Recommend and/or Send Notification options:

   a. You would select ‘Recommended’ when you want the link to appear on the learner’s Recommendations tile.
   b. You would select ‘Notify’ to send learners an email, informing them that the link has been recommended to them.

3. Search for and Add the existing external link title.

4. Search for and add the user(s) who you would like to perform the action on and select ‘Next’.
5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Note: The employee must already be assigned to the item for it to appear in the user results.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.

Assign Task Observers: Administrators can assign a task list that allows observers to users to see if learners can demonstrate why they learned will taking a course.


2. Search for and add an Item.

3. Search for and add an Observer.

4. Search for and Add the User.

5. Select ‘Schedule Job’

6. Select ‘Run this Job Immediately’ and Finish

Run this job immediately, if allowable.
Create a Group

Introduction
You can create a group when you want to reserve registration slots in a scheduled offering for specific group of employees.

Getting Started
Follow the path to create a group.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Users button > Groups tab

Groups

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

Process Overview
Follow the steps below to create a group.

Steps

1. Select the Users button.

2. Select the Groups tab.

3. Select Add New.

4. Complete the fields as outlined below:
   a. Enter the Group ID per your agency’s naming convention.

   Group ID:

   b. Enter a description of the Group.
Description:

- Enter or search for the Domain ID (select your agency, do not leave as public).

**Domain ID:**

- Select Save.

5. Associate the newly created group with an assignment profile.
   - Create an assignment profile for the group, if not previously created.
   - Once the Assignment Profile has been created and/or selected, select “Groups” within the Related menu.
   - Select the green plus icon to add the previously created group.
   - Enter the Group ID that was created (Step 4) or select Search to view all the groups within your agency’s domain.
   - Select the applicable group to add to the Assignment Profile.

**Reserve the space in the scheduled offering:** Once the assignment profile has been associated with a group, the next step is to reserve space within a scheduled offering. To reserve space in a scheduled offering, follow the below steps.

6. Select the Learning button.

7. Select the Scheduled Offerings tab.

8. Enter the Scheduled Offering ID and select search.

9. Select the Scheduled Offering ID link.
10. Once the offering has been selected, perform the following steps to reserve slots for the scheduled (in-person) offering.

   a. In the Related Menu within the Scheduled Offering, select ‘Add Users’.

   b. Select ‘Add Slots’.

   c. Select the radio button and search for the Group ID to be associate to the schedule offering.

   d. Complete the Fields and Select Save.

   e. The scheduled offering’s Registration section will show the number of slots.
Import Content: Add New Content

Introduction

Use online learning content import to import course content into the LMS. Content must be loaded before you can assign it to a course.

Getting Started

Follow the path to import content.

Your path is…

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Admin Center > Content button > Tools tab > Import Content

Import Content

> Step 1

Step 1: Select Action

- Add New Content
- Add Content for an Existing Item
- Replace Content for an Existing Item
- Enable Mobile or Offline Content for an Existing Item

Process Overview

Steps:

1. Select Add New Content. Select the Next button.

2. Select the Browse button to locate and attach the content to import. Select the Next button once content is uploaded. Note: The content name must not have any spaces in it it. Use an underscore in place of a space.
3. Configure the Content and Item Settings:
   a. Leave the ‘Deploy Content to Server’ to its default-checked.
      **Deploy Content:** ✔️ Deploy content to server
   b. Select the Server Location: Most agencies will only have one option.
      * Server Location: Content Deployment Location for DMS Catalog Items: ✔
   c. Update the Domain as applicable to your agency. Remember, **do not** leave as Public.
      * Domain ID: DMS
   d. **Content ID:** Assign a content ID. Remember, start the ID with your agency’s acronym and do not include spaces.
      **Content Package ID:** DMS_PF_UserGuide_Training
   e. Mobile Access: If content to be imported is mobile friendly, then mark the Mobile Access checkbox.
      **Mobile access:** ✔️ Enable mobile access for all content
   g. Launch Player: Always check this box.
      **Launch Mode:** ✔️ Launch in a New Browser Window
   h. Use AICC Wrapper: ONLY select if the content is not SCORM or AICC compliant, e.g., PowerPoint, PDF document, etc.
      **Use AICC Wrapper** ✔️ Apply AICC wrapper to any non-AICC/SCORM content
   i. Items Checkbox: Leave the ‘Create new Learning item for each content package’ option unchecked.
      **Items**
      ✗ Create a new Learning item for each content package.

4. Select Import Files.
5. Load the Content. Be sure to validate that your content has successfully loaded, by checking to see if the content is labeled “Success”. Then select Schedule Job.

![Import Content]

The validation was successful, please click on Schedule Job to start the deployment process.

<table>
<thead>
<tr>
<th>Status</th>
<th>Zip File Name</th>
<th>Content Package</th>
<th>Item</th>
<th>Reason</th>
<th>Edit Content Object ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Success</td>
<td>How_to_Reset_or.Change_Your_Password_in_People_First.zip</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6. Schedule Background Job.
   a. Ensure the radio button by the ‘Run this job immediately, if allowable’ is selected.

   ![Schedule Background Job]

   The action you are trying to perform could take a long time!
   Please complete the following information if you want this action email upon completion, please select “Notify via email upon completion.

   - Run this job immediately, if allowable.

   b. Uncheck the ‘Notify via email upon completion’ option.

   ![Notify via email upon completion]

   c. Select Finish.

   ![Finish]
Import Content: Add Content for an Existing Item

Introduction
Just as you can add new content, administrators can add content for an existing item. This section outlines how to import and add online course content to an existing learning item.

Getting Started
Follow the path to import content.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Admin Center > Content button > Tools tab > Import Content

Process Overview

Steps:

1. Select Add Content for an Existing Item. Select Next.

2. Select the Browse button to locate and attach the content to import. Select the Next button once content is uploaded.

3. Configure the Content and Item Settings:
a. Leave the ‘Deploy Content to Server’ to its default-checked.
   **Deploy Content:** ✔ Deploy content to server

b. Select the Server location: Most agencies will only have one option.
   **Server Location:** Content Deployment Location for DMS Catalog Items

   ![Image of server location selection](image)

c. Update the Domain as applicable to your agency. Remember, **do not** leave as Public.
   **Domain ID:** ![DMS](image)

   ![Image of domain ID input](image)

d. Content ID: Assign a content ID. Remember, start the ID with your agency’s acronym and do not include spaces.
   **Content Package ID:** DMS_PF_UserGuide_Training

   ![Image of content package ID input](image)

e. Mobile Access: If content to be imported is mobile friendly, then mark the Mobile Access checkbox.
   **Mobile access:** ✔ Enable mobile access for all content


   ![Image of offline access checkbox](image)

g. Launch Player: Always check this box.
   **Launch Mode:** ✔ Launch in a New Browser Window

h. Use AICC Wrapper: ONLY select if the content is not SCORM or AICC compliant, e.g., PowerPoint, PDF document, etc.
   **Use AICC Wrapper** ✔ Apply AICC wrapper to any non-AICC/SCORM content

i. Items Checkbox: Leave the ‘Create new Learning item for each content package’ option unchecked.
   ![Checkbox for creating new learning items](image)

4. **Select** Import Files.

5. **Load the Content.** Be sure to validate that your content has successfully loaded, by checking to see if the content is labeled “Success”. Then select Schedule Job.

   ![Image of import content success](image)

   ![Image of schedule job](image)

6. **Schedule Background Job.**
a. Ensure the radio button by the ‘Run this job immediately, if allowable’ is selected.

   **Schedule Background Job**

   The action you are trying to perform could take a long time!
   Please complete the following information if you want this as
   email upon completion, please select ‘Notify via email upon
   completion’ and email

   - Run this job immediately, if allowable.

b. Uncheck the ‘Notify via email upon completion’ option.

   [ ] Notify via email upon completion

   Email: invalidemail@invalidemail.com

c. Select Finish.
Import Content: Replace Content for an Existing Item

Introduction
Just as you can add new content, add content to an existing item, administrators can import content and replace outdated content to the existing learning item. The process is almost identical to the previously mentioned process of adding content for an existing item.

Getting Started
Follow the path to import content.

Your path is…

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Content button > Tools tab > Import Content >

Step 1: Select Action

- Add New Content
- Add Content for an Existing Item
- Replace Content for an Existing Item
- Enable Mobile or Offline Content for an Existing Item

Steps:

1. Select Replace Content for an Existing Item. Select the Next button.

2. Select the Browse button to locate and attach the content to import. Select the Next button once content is uploaded.

Select files that you would like to import as content. Any SCORM or AICC files must be in a .zip format. Other files may be in any of the following formats: .zip, .pdf, .doc, .docx, .xls, .xlsx, .html, .htm, .txt, .css, .js, .ppt, .pptx, .mp4

* Required Fields
* Content File(s):
3. Configure the Content and Item Settings:
   a. Leave the ‘Deploy Content to Server’ to its default-checked.

   **Deploy Content:** ✓ Deploy content to server

   b. Select the Server location: Most agencies will only have one option.

   *Server Location:* [Content Deployment Location for DMS Catalog Items (DMS-SFTP)]

   c. Reassign: Defaults to Reassign the New Content to all Users.

      - Reassign the New Content to All Users: Use if the new content is drastically different and learners currently assigned the item should start over; or
      - Do not reassign the new content to users: Use if you want learners who are currently assigned to the learning item to finish with the “old” content but new assignments to get the new content.

   **Reassign:** ○ Reassign the new content to all users
   ○ Do not reassign the new content to users

   d. Select Item Type: Course (only option)

   ![Select Item Type: COURSE](image)

   e. Item ID: Search for the existing item that is being updated.

   ![Item ID: DMS_PF_UserGuide](image)

   f. Revision Date: System defaults to revision date.

   ![Revision Date: 10/1/2019 01:33 PM America/New York](image)

   g. Title: Defaults to the title of the item.

   ![Title: User Guide Online Course Test](image)

4. Select Import Files.

5. Load the Content. Be sure to validate that your content has successfully loaded, by checking to see if the content is labeled “Success”. Then select Schedule Job
6. Schedule Background Job.
   a. Ensure the radio button by the ‘Run this job immediately’ is selected.

   Schedule Background Job

   The action you are trying to perform could take a long time!
   Please complete the following information if you want this e-mail upon completion, please select “Notify via email upon
   completion”.
   - Run this job immediately, if allowable.

   b. Uncheck the ‘Notify via email upon completion’ option.

   c. Select Finish.
Content: Printed Exam Templates

Introduction

This option within the tools menu on the Content page allows administrators to create printed exam templates learners can take outside of the learning management system. Printed exam templates are HTML structure.

Getting Started

Follow the path to import printed exam templates.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Content button > Tools tab > Printed Exam templates

Process Overview

Steps to Printed Exam Templates

1. After following the above path, if you are able to HTML code, edit the template data for both the printed exam and the corresponding answer key.

   Edit Printed Exam Templates
   
   ![HTML code example]

   - Description: Default template for printed exam
   - Template Data:

   - Exam Name:
   - Survey Name:
   - Exam Sequence Id:
   - Exam:
   - Survey Id:
   - Survey Name:

2. Select Apply Changes.

3. The HTML coding should not be updated unless you know HTML coding.
Adding Learning Documents

Introduction
You can add documents (books, videos, standard operating procedures, and so on) to support instructional design and delivery. You can add documents to attach them to courses, curricula, programs, and to tasks for the purpose of instructional design or delivery. Documents are another form of external links and can be used to publish additional learning materials for scheduled offerings.

Getting Started
Follow the path to create documents.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Content button > Documents tab

Documents
Search

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

Case sensitive search: ☐ Yes ☐ No

Document ID:
Title:

Add/Remove Criteria

Search
Save As
Reset

Process Overview
Follow the steps below to add learning documents.

Steps

1. Select Content Button.

2. Select the Documents tab.

3. Select Add New link.

4. Enter the document information. It is recommended that the following fields are updated, when adding documents. The remaining fields may also be used to assist in capturing agency information.
a. **Document ID:** Enter in a unique document ID. Remember, start the ID out with your agency’s acronym and cannot include spaces.

b. **Title:** Enter a title for the document.

c. **Active:** Leave the box checked if you want the document to be active, if it is inactive it will not show up in searches.

d. **Document Type:** Use the dropdown to select the type of document you are uploading.

e. **Domain:** Update the domain field to your agency. Do not leave as public

f. **File Path:** Add the URL path for the document.

g. **Author:** You many capture the name of the author of the document. This may be useful for internally sourced documents.

h. **Rev. Date:** Used to indicate the date the document was revised.

Once the fields are completed, select ‘Add’.

5. Associate the document with a classroom-based training, curricula, or task.

6. To associate to an item:

   a. Select the Learning Button.

   b. Search for the previously created item (or create a new item) and select the item.

   c. Once in the item, select ‘More’ in the Related Menu on the bottom left.
d. Select Documents tab.

Documents

Edit the Documents for the Item
Sections that cannot be edited are not accessible. Access all sections in view mode.

Add a Document to the Item
Enter Document ID or add one or more from list

Document ID:

Add

Update the Documents for the Item

<table>
<thead>
<tr>
<th>Document ID</th>
<th>Title</th>
<th>Needs Review</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>DMIS LMS User Guide</td>
<td>User Admin User Guide</td>
<td>Select All</td>
<td>Select All</td>
</tr>
</tbody>
</table>

User Guide Document Upload

Documents Related to This Course

1

Lms Admin User Guide
Create an Item

Introduction
An item is the foundation in which all courses are created upon. Administrators can use items to create an online course, classroom courses, or to create a task. The below process overview explains how to create an item for each of the four item types.

Getting Started
Follow the path to create an item for a course.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Items tab > Add New

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

- **Scheduled Only**: This item will be scheduled at specific dates and times, with the option to assign instructors and locations. Example: Classroom course
- **Online Only**: This item will have associated online content that can be launched and completed at any time. Example: Web-based tutorial
- **Scheduled and Online**: This item will contain both scheduled and online components.
- **Other**: This item will be neither scheduled nor online, and actions must be taken outside of the system to complete it. Example: Read a book

Process Overview
Follow the steps below to create an item.

Steps
1. Select Add New, then select the type of item you would like to add: Scheduled Only; Online Only; Scheduled and Online; or Other, and select OK.
2. Complete the fields.
   a. **Basic Information Fields** (Section available for all item types)

   - **Item Type**: Select the green plus icon and select Course (only option).
   - **Item ID**: Enter the Item ID, based on the naming conventions established by your agency. Remember always start with your agency acronym.
   - **Title**: Enter the title of the item.
   - **Description**: Enter a brief description that describes the content to provide learners a better idea of what the course is about.
Domain: Always defaults to Public. Update it to your agency’s domain.

Approval Required: Defaults to No. If approval is required for a learner to take the course, change to Yes and select the appropriate approval process. Suggestion is to only require approval for scheduled courses.

Approval Process: If Approval Required is set to yes, then select the appropriate approval flow. If approval is not required, then leave blank:

- Level 1 and Level 2 Supervisor Approval (2 STEP SUPERVISOR) – Select if the training requires approval by both the employee’s supervisor and second-level supervisor.
- Level 1 Supervisor Approval (1 STEP SUPERVISOR) – Select if the training requires approval by only the employee’s direct supervisor.
- Approver Approval – Select if the approval for the training course is required, but is not the Level 1, or Level 1 and Level 2 supervisors. If using this option, the approval is sent to all users in your agency who are assigned the approval role.

b. Additional Options Section: Section available regardless of the item type

Revision Date: Defaults to current date.

CPE Hours: If the course is tied to a professional certification and will count towards continuing professional education credits, enter the credit hours here. This field is used to capture all educational hour types.

Contact Hours: This is the number of hours the learner is expected to be in contact with the instructor. Mainly used for onsite training (classroom, field training, etc.).

Revision Number: If updating the course, then enter the revision number.
Revision Time: Defaults to the current time based on the administrators’ time zone in the LMS. Update if appropriate.

3. Select ‘Save and Exit’

4. Once the item has been created, you will have the option to input additional settings within the item. **Note:** Some of the fields are only applicable for certain item types.
   a. Select View All to expand the section.

b. Once expanded, you will see that the screen is divided into four sections: Summary, Extended Summary, Design, and Process Control. All sections and fields within those sections are explained below.

c. **Summary:**

   - **Classification:** Defaults to the value selected in Step 1. Cannot be edited.
   - **Domain:** If you failed to select your agency’s domain in the initial setup, update the domain to your agency.
   - **Thumbnail File:** Option to add a picture or icon (jpg.) that will appear alongside the course title. Highly recommend this is updated otherwise the default image will appear.
   - **Approval Process and Approval Required:** If the item requires some level of approval, i.e., Level 1, Level 2, or Approver Approval indicate that in this section.
   - **Assignment Type:** Is the course Required, Recommended, or Optional?
   - **Credit Hours:** The number of hours that a user earns for completing a learning event. For example, in many U.S. colleges, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equals 45; however, the college grants 3 credit hours for this class.
• **Thumbnail URL**: Rarely used. Ability to link to an image on the internet. Image is displayed as the course image. Recommendation is to use a Thumbnail File, not Thumbnail URL.

• **Contact's Email**: Enter the email address of the individual responsible for maintaining and scheduling the course.

• **Extended Summary**:

```
<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creation Date: 1/1/2019</td>
<td></td>
</tr>
<tr>
<td>Source: Internal</td>
<td></td>
</tr>
<tr>
<td>Max Registration: Yes</td>
<td></td>
</tr>
<tr>
<td>Self-Registration: Yes</td>
<td></td>
</tr>
<tr>
<td>Delivery Method: Online</td>
<td></td>
</tr>
<tr>
<td>Certificate Template:</td>
<td></td>
</tr>
<tr>
<td>Column 1:</td>
<td></td>
</tr>
<tr>
<td>Column 2:</td>
<td></td>
</tr>
</tbody>
</table>
```

• **Active**: Defaults to Yes. To remove from availability, change to No.

• **Source**: Default to blank. Includes Internal (online or agency hosted), External (external provider), LinkedIn Learning and Skillsoft. However, only Internal and External are valid.

• **Max Registration**: Only valid for in-person training. This indicates the maximum capacity for a Scheduled Offering.

• **Self-Registration**: Defaults to Yes. If the training is not available to self-register change to no.

• **Delivery Method**: The instructional method used to deliver learning. Further defines how the training will be delivered.

• **Creation Date**: Defaults to the day the course was created. Update as needed.

• **Min Registration**: Only valid for in-person training. The minimum number of enrollments for the Scheduled Offering to occur. Does not automatically cancel the course if the minimum registration is not met.

• **Certificate Template**: If a completion certificate is to be used for the course, select the certificate to use. Certificate must have been created previously.

• **Design**:

```
<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Hours:</td>
<td></td>
</tr>
<tr>
<td>Initial Basis:</td>
<td></td>
</tr>
<tr>
<td>Initial Period:</td>
<td></td>
</tr>
<tr>
<td>Initial Required Date Basis:</td>
<td></td>
</tr>
<tr>
<td>Retraining Basis:</td>
<td></td>
</tr>
<tr>
<td>Initial Number:</td>
<td></td>
</tr>
<tr>
<td>Retraining Period:</td>
<td></td>
</tr>
</tbody>
</table>
```

• **Contact Hours**: Used for scheduled training. The total number of hours that you expect a learner to have contact with an instructor.

• **CPE Hours**: If the course is tied to a professional certification and will count towards continuing professional education credits.

• **Initial Basis**: Used when the item has a due date. Basis on which the course must be completed (calendar or event).

• **Initial Period**: The period (days, months, quarter, year) to apply the initial basis to.

• **Initial Number**: Enter the number of periods to apply the initial basis to.

• **Initial Required Basis**: If using the initial basis to require completion, select Assignment Date (if this will be used for OPS employees, do not select Hire Date as this is agency hire date, not position hire date).

• **Retraining Basis**: Basis on which a course must be completed again. Only utilized if the item is part of a curricula.

• **Retraining Period**: The period (days, months, quarter, year) to apply the retraining basis to. Only utilized if the item is part of a curricula.

• **Retraining Number**: Number of periods to apply the retraining basis to. Only utilized if the item is part of a curricula.
f. Process Control:

<table>
<thead>
<tr>
<th>Process Control</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable User Requests:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisors can record Learning Event</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Registration Threshold Days:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Enable User Waitlist:</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Enable User Ratings:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Supervisors Can Record Learning Event</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Include User Ratings from Previous Revision:</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

- **Enable User Request**: Scheduled courses only. Defaults to Yes. Allows learners to request that an additional scheduled offering be scheduled.
- **Enable User Waitlist**: Scheduled course only. Defaults to Yes. Allows learners to register themselves to the waitlist if the class is full. They are automatically moved to the class roster should a registration space open up.
- **Registration Threshold Days**: Restricts users from registering into multiple scheduled offerings during a time period (days).
- **Enable User Ratings**: Defaults to No. Allows users to rate the course upon completion.
- **Supervisors Can Record Learning Event**: Defaults to Yes. Allow managers to post a completion status for the employee.
- **Include User Ratings from Previous Revision**: Defaults to Yes. If the course has been revised, the system calculates the previous course rating with the current course rating.

5. Utilize the Related Menu to associate the items to a catalog, subject areas, assignment profile(s), etc.

- **Assignment Profiles**: If a course is to be assigned to a learners training plan, select the green plus icon to search for and add the desired assignment profile. Once added, if the status reads 'pending', select the assignment profile hyperlink and propagate. When the status reads 'valid', this means the course and selected assignment profile are up to date and linked.

- **Catalogs**: If a course is available for learners to register, use the green plus icon and search for and add the desired catalog you want associated with the item.

- **Subject Areas**: Subject areas are a way of indexing items within a catalog when learners are registering for a course (allows them to narrow their search). Select the green plus icon and select search to view all the subject areas. Note: the relevant subject areas are the first 14 entries.

- **Scheduled Offerings**: View only. Only valid for in-person (scheduled) and blended (schedule and online) training. Refer to the Schedule item in the Actions menu for creating an additional scheduled offering for the same course.

- **Segments**: Only valid for scheduled and blended training, where the training is happening, over a period of days, weeks or months. Allows you to break up the training into time based segments.

- **Online Content**: Only for online and blended trainings. Use to assign the training content for the online portion of the training, as well as additional
materials for the training. Content must have been previously imported.

g. **Curricula**: View only. If the item is assigned to a curricula, it will show here.

h. **Prerequisites**: Allows you to create prerequisite groups that identify a course or set of courses that users must complete prior to enrolling into a selected course.

i. **Substitute**: Allows you to add courses that users can take as a substitute for a learning item. You can define the substitute relationship in this tab by searching and adding the item that is eligible for substitution.

j. **Tasks**: Allows you to assign tasks that must be completed as part of the course. Admins can add tasks to courses to specify the tasks that a user should be able to accomplish after successfully completing the course. The tasks must be created before being assigned.

6. **Actions Menu**: After the fields within the Related Menu have been addressed, as required, there are options within the Actions Menu. Different options are presented for in-person training when editing a scheduled offering of the course.

   ![Actions Menu](image)

   **Assign**: Select ‘assign’ when you want to add training to select users’ training profile. Once you select assign, you can search for users, and follow the wizard through the steps to assign the course, and run the job.

   **User Needs Management**

   ![User Needs Management](image)

   **Step 2: Select Users**

   ![Step 2: Select Users](image)

   **Cover Page**: Optional. This feature is defaulted to inactive. You can use this to create an initial cover page that include additional details about the training. Allows you to apply context and branding to the course.

   **Send Notification**: Allows administrators to select the criteria for sending emails. Administrators can choose to use existing system emails, or to create custom
emails. Follow the built-in wizard to select the user(s) you would like to notify.

### Send Notification

* = Required Fields

**Step 6: Build Email**

<table>
<thead>
<tr>
<th>Select Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Template:</td>
</tr>
</tbody>
</table>

**Specify Email Addresses**

- **Reply To:**
- **From:**
- **Send copies to:**

Note: The above recipients will receive 1 email for each user receiving this notice.

- **Second copy of email to users’ supervisors:**

**Customize Contents**

### Copy:

Allows you to copy the course to create a new course or scheduled offering. You have the option to check what elements of the items you would like to copy.

#### Copy Item

<table>
<thead>
<tr>
<th>Old Item Type ID:</th>
<th>COURSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old Item ID:</td>
<td>DMS - ALL - HR 1</td>
</tr>
<tr>
<td>Old Revision Date:</td>
<td>4/26/2019 07:52 AM America/New York</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New Item Type ID:</th>
</tr>
</thead>
<tbody>
<tr>
<td>COURSE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New Item ID:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>New Revision Date: (MM/DD/YYYY)</th>
<th>10/5/2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revision Time: (12-hour AM/PM)</td>
<td>04:00 PM</td>
</tr>
<tr>
<td>Time Zone:</td>
<td>Eastern Standard Time (America/New York)</td>
</tr>
</tbody>
</table>

### Revise:

Rarely used feature. Enables administrators to update selected values for the course.

**Items**

> Search > Edit Summary > Revise > Step 1

**Step 1: Item Revision**

Please enter the new revision number and date for this item. You may also change the title of the new revision.

- **New Revision Date:**

- **Time:**

- **Time Zone:**

<table>
<thead>
<tr>
<th>Revision Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

**Title:**

The Fundamentals of HR Module 1

Title entered here will be saved in English locale. There may be values in other locales that can be edited by clicking the globe icon, after the revised item has been created.

**Delete:**

Allows you to delete the item.

**Delete Item**

> Are you sure you want to delete this Item?

[Yes] [No]
AICC Export: Legacy feature and is not used.

Create an Online Course

Introduction
Creating an online only course is housed within the Items tab on the Learning page. Remember that online course content is not created in the system, rather you will upload content and create a place for the content to be housed until it is time for a learner to launch the course.

Getting Started
Follow the path to get started creating an online course.

Your path is...
People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Items tab > Add New > Online Only

Process Overview
Steps
1. Select the Add New Link, select ‘Online Only’, select OK and complete the following steps.

2. a. Complete the Required Fields, like we outlined in the previous section:

   Item Type: Select the green plus icon and select Course (only option).

   Item ID: Enter the Item ID, based on the naming conventions established by your agency. Remember always start with your agency acronym.

   Title: Enter in the title of the item, (what learners will see.)

   Description: Enter a brief description that describes the content to provide the learners a better idea of what the course is about.

   Domain: Always defaults to Public. Update it to your agency’s domain.

   Approval Required: Defaults to No. If approval is required for a learner to take the course, change to Yes and select the appropriate approval.
process. Suggestion is to only require approval for scheduled courses.

**Approval Process:**

If Approval Required is set to yes, then select the appropriate approval flow. If approval is not required, then leave blank:

- **Level 1 and Level 2 Supervisor Approval (2 STEP SUPERVISOR)** – Select if the training requires approval by both the employee's supervisor and second-level supervisor.

- **Level 1 Supervisor Approval (1 STEP SUPERVISOR)** – Select if the training requires approval by only the employee's direct supervisor.

- **Approver Approval** – Select if the approval for the training course is required, but is not the Level 1, or Level 1 and Level 2 supervisors. If using this option, the approval is sent to all users in your agency who are assigned the approval role.

**Additional Options:**

Select ‘View All’ to expand the Additional Options (optional).

- Revision Date: defaults to current date.

- **CPE Hours**: If the course is tied to a professional certification and will count towards continuing professional education credits, enter the credit hours here.

- **Contact Hours** – This is the number of hours the training will take. Mainly used for onsite training (classroom, field training, etc.).

- **Revision Number** – If updating the course, then enter the revision number.

- **Revision time** – Defaults to the current time based on the administrators' time zone in the LMS. Update if appropriate.

b. Select Continue.

3. To add content to the item, select the green plus sign and select type of content to associate with the course.
• **Add Folder**: Folders are used to structure and learners to complete all objects within the folder in a sequence. After a folder is created, a content object, content package, and assessment can be added.

• **Add Content Object**: For non-SCORM/AICC compliant objects, e.g., PDFs, PowerPoint, etc.

• **Add Exam Object**: LEGACY FUNCTION do not Use. Will be eliminated in future release. Use Assessment.

• **Add Content Package**: Select for SCORM/AICC compliant content.

• **Add Assessment**: Select to associate an assessment (must have been previously created, if applicable).

4. Search for and select the previously uploaded content, then select ok.

5. Update the record learning settings within the content object. This will ensure any scoring or quizzes housed in the SCORM package will be copied at the item level.

   a. Select the content object hyperlink

   - Once the 'Edit Content Object' box opens, select the appropriate setting. If you have embedded a quiz in the content, you will most likely check the box
6. Update Settings in order to launch the content.
   a. Select Settings, then Modify Settings.

   b. Select the checkboxes: Content is available for launch and Record learning event when all content is complete.

   c. Select the appropriate Completion Status. This will appear on a learner’s training transcript.

   d. If applicable, complete the Failure Status and Failure Action. Failures will not appear on a learner’s training transcript.
e. Leave the following checkboxes unchecked: ‘Skip content structure page on launch’ and ‘Available for Offline Player download’.

- Skip content structure page on launch
- Available for Offline Player download

f. Check ‘Allow User to Review Content from Completed Works’. If this is not checked the learner will not be able to access the content post-completion. Leave the AICC Max Value at 99.

- Allow users to review content from Completed Works
  AICC Max-Normal: 99


g. Select the OK button to save your changes, then select Save and Exit.
7. Input ‘Additional Settings’ within the item.

[Image]

**Note:** The screen is divided into four sections: Summary, Extended Summary; Design; and Process Control (fields explained below.) Not all fields are applicable to all course types. To review all the fields and their definitions, refer to Page 43.

8. Relate the Items. Once you input the additional information for the item, you are now able to associate, or relate, that item to assignment profiles, catalogs, subject areas etc. Not all tabs apply to an online only course. For a detailed overview on how to use the related menu when creating an item, refer to Page 45.

[Image]

9. After the fields within the Related Menu have been addressed, as needed, there are options available within the Actions Menu. For a detailed overview on the relationship between an Item and the Actions menu when creating an item, refer to Page 46.

[Image]
Create a New Scheduled Offering

Introduction
Scheduled Offerings are most commonly known as in-person or classroom trainings. A scheduled offering should be thought of as an instance of when the training will occur. The item itself (materials, course information, subject areas, etc.) must be created first in the Items menu - Scheduled Only.

Getting Started
Follow the path to create a scheduled course.

Your path is...

- People First Login page > Manager or Employee Landing page > Talent Management tile
- > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Scheduled Offerings tab > Add New

Add New

Add New Scheduled Offering

1. Summary Information

- Type: Item / Schedule Block
- Item ID:
- Domain: PUBLIC

Description:

Catalogs: Publish in all associated catalogs

Catalogs may be individually removed from the Scheduled Offering.

2. Schedule Information

- Start Date: [MM/DD/YYYY]
- Start Time: [hh:mm AM/PM]
- Time Zone: Eastern Standard Time (Am/PM)

3. Resources

- Facility:
- Primary Location:
- Primary Instructor:
- Equipment:

Steps:

1. Go through the process of creating an item as discussed on Page 41 and select ‘Schedule Only’ under the ‘Add New’ link and create the item. Once the item has been created, use the file path outlined above to create the actual offering.

2. After creating the Scheduled Only Item, select ‘Add New’ on the Scheduled Offerings tab and completed the summary information.

Scheduled and Online

This item will contain both scheduled and online components.
a. Summary Information Fields

1. Summary Information

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Catalogs: Publish in all associated catalogs (☐)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>Communication Skills Scheduled Offering</td>
<td>Catalogs may be individually removed from the Scheduled Offering</td>
</tr>
</tbody>
</table>

**Type**: Defaulted to Item. Only Item should be used as the LMS is not integrated into each agency’s calendaring system.

**Item Type**: Defaults to course (only option).

**Item ID**: Search for (🔍) and select the classroom course you are creating another scheduled offering for.

**Domain**: Defaults to Public. Search for and select your agency’s domain.

**Description**: Enter a description that illustrates the purpose of the course.

**Catalogs**: Leave this field selected to publish this scheduled occurrence in the catalogs that are assigned to the course.

b. Schedule Information Fields

2. Schedule Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Start Date</em></td>
<td>10/24/2019</td>
</tr>
<tr>
<td><em>Start Time</em></td>
<td>08:00 AM</td>
</tr>
<tr>
<td><em>Time Zone</em></td>
<td>Eastern Standard Time (Ame)</td>
</tr>
</tbody>
</table>

**Start Date**: Scheduled offering start date.

**Start Time**: Scheduled offering start time. Enter the start time in HH:MM PM or AM format. For example, if the start time is 8 am, then enter 08:00 AM. Note: Military time is not accepted.

**Time Zone**: Required. Select the time zone for the location where the training will be held.

c. Resources Fields (All fields are optional)

3. Resources

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility</td>
<td>Tallahassee (DMS_Tallahassee)</td>
</tr>
<tr>
<td>Primary Location</td>
<td>Conference Room 101 (DMS_101)</td>
</tr>
<tr>
<td>Primary Instructor</td>
<td>01095205</td>
</tr>
<tr>
<td>Equipment</td>
<td></td>
</tr>
</tbody>
</table>

**Resource Usage View**: Instructor

**Facility**: Add a Facility, Ad Hoc Facility, or select a facility from your agency’s previously added facilities. **Note**: Check first to see if the facility is available in the drop-down options.

**Primary Location**: Enter the training room location.
Primary Instructor: Select the instructor who will be facilitating the training.

Equipment: Field is not used.

Resource Usage View: Leave as instructor

3. Select Save.

4. After the offering has been created, update Additional Settings (select View All link at the top of the information section).

a. Scheduled Offerings Extended Summary Fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact: Instructor</td>
<td>Enter the instructor's name for this scheduled offering.</td>
</tr>
<tr>
<td>Email:</td>
<td>Enter or edit the contact's email address for the scheduled offering.</td>
</tr>
<tr>
<td>Active: Yes or No.</td>
<td>Displays Yes or No. Represents if the scheduled offering is still active.</td>
</tr>
<tr>
<td>Source: Optional.</td>
<td>Enter or edit the contact’s name for this scheduled offering.</td>
</tr>
<tr>
<td>Enable Cancellation Reason: Yes</td>
<td>Allows learners to select a cancellation reason in the event a learner cancels.</td>
</tr>
<tr>
<td>Email:</td>
<td>Enter or edit the contact’s email address for the scheduled offering.</td>
</tr>
</tbody>
</table>

b. Registration Fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email confirmation to the Instructor: Yes</td>
<td>Sends an email to the instructor when a learner registers for the offering.</td>
</tr>
<tr>
<td>Email confirmation to the Supervisor: Yes</td>
<td>Sends an email to the supervisor when a learner registers for the offering.</td>
</tr>
<tr>
<td>Enable Users to Waitlist: Yes</td>
<td>Allows learners to register to the waitlist for a training if the class is full.</td>
</tr>
<tr>
<td>Minimum Registration:</td>
<td>Limits the number of learners that can sign-up for training.</td>
</tr>
<tr>
<td>Registration Cut-off Date: MMMDDYYYY</td>
<td>Recommended. Last day that learners can register for the scheduled offering.</td>
</tr>
<tr>
<td>Registration Cut-off Time:</td>
<td>Recommended. End time for the cut-off date, that learners can register for the offering.</td>
</tr>
<tr>
<td>Registration Cut-off Time Zone:</td>
<td>Recommended. Time zone for the registration cut-off date.</td>
</tr>
<tr>
<td>Published Price:</td>
<td>Not used.</td>
</tr>
</tbody>
</table>

Published Price: Not used.
• **Self-Registration**: Defaults to Yes. If not available for self-registration, change to No.

• **Supervisor Registration**: Defaults to Yes. Suggestion to leave as ‘Yes’, so a supervisor can assist with registration.

• **Withdraw Cut-off Date**: Recommended. Last day that registered learners can withdraw from the scheduled offering.

• **Withdraw Cut-off Time**: Recommended. End time that registered learners can withdraw from the scheduled offering, on the withdraw cut-off date.

5. Select Save.

6. **Create Segments for the Scheduled Offering**: Creating segments for the offering is an optional feature and allows you to break the classroom training into segments (blocks of time) to provide additional information to learners about how the offering is divided. To create segments:
   a. While still in the Scheduled offering, select Segments within the Related Menu.

   ![Segments Menu](image)

   b. Select the green plus icon to add segments.

   ![Add Segment](image)

   c. Fill in the information related to the segment(s) you would like to create. Add resources such as location or instructor changes.

7. **Update Settings**: To update various default settings select the Settings button. Deselect the applicable checkboxes. Note: It is rare that these would be updated.

8. **Update Email Notifications**: Emails are configured for enrolling, cancelling, withdrawing, adding/removing from the waitlist. Recommendation is to not edit the standard emails; however, you can modify for the scheduled offering.

9. **Registration**: To add an employee or group of employees to the training prior to publishing in the Catalog, select Registration in the Related Menu.
   a. Select the Registration tab within the Related Menu.

   ![Related Menu](image)

   b. Select the green plus icon to add users.

   c. You can enroll learners in the scheduled offering by entering each user's Login ID or by selecting add one or more from list to locate and select users.
to add to the offering. There is also the availability to search by an assignment profile and add learners from the profile to the course.

10. **Catalogs**: If the offering is to be published for only specific catalogs that you assigned the course to, then select Catalogs in the Related menu and remove the catalogs that this scheduled offering should not be published to.

11. **Add Additional Contacts**: If you have additional staff that should receive emails related to registration for the course, you can add them in the Related menu Contacts page. Select the 'More' link to add additional contacts.

12. Utilize the Actions Menu to edit a scheduled offering.

**Copy**: Allows you to copy the scheduled offering to create a new scheduled offering.

**Cancel the Scheduled Offering**: Only presented for Scheduled and Online and Scheduled (blended) course types, and only if the course is *future dated*. Allows you to cancel a *future dated* scheduled offering and removes the registration from the registered learners.

**Delete**: Allows you to delete a future dated scheduled offering.
Record Learning: Only presented for Scheduled and Online and Scheduled (blended) course types. Allows you to record the learning as completed for the class attendees.

Send Notification: Allows administrators to create an email and send to selected users.

Initiate Evaluations: Only presented for Scheduled and Online and Scheduled (blended) course types. Allows you to send a class evaluation after the course is completed. Evaluation must be created and associated to the item first.

View Roster: Only presented for Scheduled and Online and Scheduled (blended) course types. Allows the trainer to view and print the class roster in a printer friendly format for sign-in purposes.

Notify Instructors: Only presented for Scheduled and Online and Scheduled (blended) course types. Allows notifications to be sent to the instructor based on learning activities.

13. Record Learning after Completion: Once the course is completed, the lead trainer must update the status of the attendees for the course. Note: this is one method to complete this action. Trainers may also do this from my classes tab. To update the status of the attendees for the course:
   
a. Select the Users tab.

b. In the Tools Menu, select ‘Record Learning Multiple’.

c. Select the radio button according to what type of course you wish to record.

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

d. Search and select the item (course) which you are wanting to record completion for. Then select ‘Add’.

   Search & Add Scheduled Offerings

   Scheduled Offering ID:  

List of Selected Scheduled Offerings

<table>
<thead>
<tr>
<th>Scheduled Offering ID</th>
<th>Item</th>
<th>Title</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td>COURSE DMS-ALL-10</td>
<td>Communication</td>
<td>5/24/2019</td>
</tr>
<tr>
<td>(Rev 1 - 5/21/2019 12:44 PM America/Chicago)</td>
<td>Skills</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   e. Search for the Users who you wish to record completion. If a scheduled offering, you can autofill from the roster.
f. Select the Next button at the top right of the screen.

Next

f. Select the Next button at the top right of the screen.

Next

i. Change the radio button to “Do Not Assess”.

Change the way competencies are assessed

- Assess based on item setting  - Assess all items  Do Not Assess

j. Select Submit.

Submit
Create a Blended Course

Introduction

Blended courses are one of the four available item (course) types in the learning management system. Create a blended course when part of the course is instructor-led, in person training, while the other part of the course is online.

Getting Started

Follow the path to create a blended course.

Your path is…

People First Login page > Manager or Employee Landing page > Talent Management tile
>Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Items tab > Add New > Scheduled and Online

Process Overview

STEPS:

1. Select the ‘Learning Button’.

![Learning Button]

2. Select Items tab.

![Items]

3. Select Add New.

![Add New]

4. Select the ‘Scheduled and Online’ option and select OK.

![Scheduled and Online]

This item will contain both scheduled and online components.

5. After selecting the Scheduled and Online Item, choose ‘Add New’ on the Scheduled Offerings tab and fill out the summary information.

a. Basic Information:
Item Type: Select the green plus icon and select Course (only option)

Item ID: Enter the Item ID, based on the naming conventions established by your agency. Remember always start with your agency acronym.

Title: Enter in the title of the item (what learners will see).

Description: Enter a brief description that describes the content to provide learners a better idea of what the course is about.

Domain: Always defaults to Public. Update it to your agency’s domain.

Approval Required: Defaults to No. If approval is required for a learner to take the course, change to Yes and select the appropriate approval process. Suggestion is to only require approval for scheduled courses.

Approval Process: If Approval Required is set to yes, then select the appropriate approval flow. If approval is not required, then leave blank:

- Level 1 and Level 2 Supervisor Approval (2 STEP SUPERVISOR) – Select if the training requires approval by both the employee’s supervisor and second-level supervisor.
- Level 1 Supervisor Approval (1 STEP SUPERVISOR) – Select if the training requires approval by only the employee’s direct supervisor.
- Approver Approval – Select if the approval for the training course is required, but is not the Level 1, or Level 1 and Level 2 supervisors. If using this option, the approval is sent to all users in your agency who are assigned the approval role.

b. Schedule Template:

Number of Days: Enter the number of days the course occur over.

Hours per Day: Enter the number of hours the course will be conducted each day.

c. Additional Options:

Revision Date: Defaults to current date.

CPE Hours: If the course is tied to a professional certification and will count towards continuing professional education credits, enter the credit hours here. This field is used to capture all educational hour types.

Contact Hours: This is the number of hours the learner is expected to be in contact with the instructor. Mainly used for onsite training (classroom, field training, etc.).

Revision Number: If updating the course, then enter the revision number.
6. Select Continue to move to the next step or Save and Exit to return to the item later.

7. Add previously uploaded content to the scheduled and online course:
   a. Select the green plus sign next to online content.
      ![Add New Item - User Guide Blended Course](image)
   b. Select the type of content to upload:
      - **Add Content Object**: For non-SCORM/AICC compliant objects, e.g., PDFs, PowerPoint, etc.
      - **Add Exam Object**: LEGACY FUNCTION, do not use. Will be eliminated in future release. Use Assessment.
      - **Add Content Package**: Select for SCORM/AICC compliant content.
      - **Add Assessment**: Select this option to associate an previously created assessment with the item.
   c. Search for and select previously uploaded content to attach to the item.

8. Update settings to launch content. Select the Settings dropdown.
   a. Select Settings, then Modify Settings.
      ![Modify Settings](image)
   b. Select the checkboxes: Content is available for launch and record learning event when all content is complete.
      - Content is available for launch (available for users)
      - Record learning event when all content is complete
c. Select the appropriate Completion Status:

- COURSE-C (Completed) - For Credit
- COURSE-S (Substitute) - For Credit
- COURSE-W (Wave) - For Credit

d. If applicable, complete the Failure Status and Failure Action.

- Failure Status: COURSE-NS (No Show) - Not For Credit
- Failure Action: Lock item after failure

Note: Make sure the ‘Allow User to Review Content from Completed Works’ is checked. If this is not checked the learner will not be able to access the content post-completion. Leave the AICC Max Value at 99.

f. Leave the following checkboxes unchecked: Skip content structure on page launch and Available for Online player.

- Skip content structure page on launch
- Available for Offline Player download

h. Select the OK button to save your changes, then select Save and Exit.
9. Input ‘Additional Settings’ within the item.

   ![User Guide Blended Course]
   
   Description:  
   No description in current locale.

   Classification:  
   Blended

   Domain:  
   Department of Management Services

   ![View All]

Note: The screen is divided into four sections: Summary, Extended Summary, Design, and Process Control (fields explained below.) Not all fields are applicable to all course types. To review all the fields and their definitions, refer to Page 44.

10. Utilize the Related Menu to relate the items to an assignment profile, catalog, subject area(s), assignment profile(s), etc. Note: there are more options on the related menu for a blended course, since there is an in-person as well as online component to the item.

   a. Assignment Profiles: Optional. If a course is to be assigned to learners training plan, select the green plus icon to search for and add the desired assignment profile. NOTE: Once added, if the status reads ‘pending’, select the assignment profile hyperlink and propagate. When the status reads ‘valid’ this means the course and selected assignment profile are up to date and linked.

   b. Catalogs: Optional. If a course is available for learners to register, use the green plus icon and search for and add the desired catalog(s) you want associated with the item.

   c. Subject Areas: Optional. Subject areas are a way of indexing items within a catalog. Select the green plus icon and select search to view all applicable subject areas. Note: only the first 14 subject areas are relevant.

   d. Scheduled Offerings: View only. Only valid for in-person (scheduled) and blended (schedule and online) training. Refer to the Schedule item in the Actions menu for creating an additional scheduled offering for the same course.

   e. Segments: Only valid for scheduled and blended training, where the training is happening over a period of time or has multiple instructors. Allows you to divide the training into blocks of time.

   f. Online Content: Only for scheduled and blended trainings. Use to assign the training content for the online portion of the training, as well as additional materials or the training. Content must have been previously imported.

   g. Curricula: View only. If the item is assigned to a curricula, it will show here.

   h. Prerequisites: Allows you to create prerequisite groups that identify a course or set of courses that users must complete prior to enrolling into a selected course.

   i. Substitute: Only valid for online courses. Allows you to assign a course as a substitute for the course.
j. **Tasks:** Only valid for online courses. Allows you to assign tasks that must be completed as part of the course. Tasks must be created first.

11. a. While still in the Scheduled offering, select Segments within the Related Menu.

   ![Related Menu]

   ![Registration]

   Catalogs

   Segments

b. Select the green plus icon to add segments.

c. Fill in the information related to the segment(s) you would like to create. Add resources such as, location or instructor changes.

   ![Add Segment]

   Required

   ![Start Date: 10/4/2019]  ![Start Time: 01:30 PM]

   ![End Date: 10/4/2019]  ![End Time: 05:00 PM]

   ![Time Zone: Eastern Standard Time (Americ/New York)]

   Description: Segment One

   Resources

   ![Apply To...]

   Type & Title

   ![Primary]  ![Remove]

   Location

12. Update Settings: To update various default settings select the Settings button. Deselect the applicable checkboxes. Note: It is rare that these would be updated.

13. Update Email Notifications: Emails are configured for enrolling, cancelling, withdrawing, adding/removing from the waitlist. Recommendation is to not edit the standard emails; however, you can modify for the item.

14. Registration: To add an employee or group of employees to the training prior to publishing in a Catalog. Select Registration in the Related Menu.

   a. Select the Registration tab within the Related Menu.

   ![Related Menu]

   ![Registration]

   b. Select the green plus icon to add users.

   c. You can enroll one or many users in the scheduled offering by entering each user's ID or by selecting add one or more from list to locate and select users to add to the offering.

15. Utilize the Actions Menu to edit a scheduled offering.
a. **Assign**: You can assign learning needs to users in many ways. When you want to assign or remove the assignment of a specific need to individual users, the most convenient way is User Needs Management.

b. **Scheduled**: Only presented for Scheduled and Online and Scheduled course types. Gives you the ability to create a new schedule offering.

c. **Cover Page (inactive)**: This feature is defaulted to inactive. You can use this to create an initial cover page that includes additional details about the training. This allows you to apply additional context and branding around the training.

d. **AICC Export**: Not Used.

e. **Send Notification**: Allows administrators to create an email and send to selected users.

f. **Copy**: Allows admins to copy the blended item.

g. **Revise**: Allows admins to update the revision date for the course.

h. **Delete**: Allows you to delete the item.

**Helpful Hint**: Once you create a scheduled offering portion of the blended course, you can search for the schedule offering and modify it as needed within the Scheduled Offering tab.
Create an ‘Other Item’

Introduction

When you select Other Item, you can create an item that does not contain scheduled segments nor online content (for example, reading a book).

Getting Started

Follow the path to create an ‘Other Item’.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Items tab > Add New > Other

Process Overview

Steps

1. Select the Learning button.

2. Select the Items tab.

3. Select Add New.

4. Select the ‘Other’ item option and select OK.

5. Enter information about the other item you are creating.

   Item Type: Select the green plus icon and select Course (only option).

   Item ID: Enter in the Item ID, based on the naming conventions established by your agency. Remember always start with your agency acronym and do not include spaces.

   Title: Enter in the title of the item (what learners will see).
Description: Enter a brief description that describes the content to provide the learners a better idea of what the course is about.

Domain: Always defaults to Public. Update it to your agency's domain.

Approval Required: Defaults to No. If approval is required for a learner to take the course, change to Yes and select the appropriate approval process. Suggestion is to only require approval for scheduled courses.

Approval Process: If Approval Required is set to yes, then select the appropriate approval flow. If approval is not required, then leave blank:

- Level 1 and Level 2 Supervisor Approval (2 STEP SUPERVISOR) – Select if the training requires approval by both the employee's supervisor and second-level supervisor.
- Level 1 Supervisor Approval (1 STEP SUPERVISOR) – Select if the training requires approval by only the employee's direct supervisor.
- Approver Approval – Select if the approval for the training course is required, but is not the Level 1, or Level 1 and Level 2 supervisors. If using this option, the approval is sent to all users in your agency who are assigned the approval role.

Additional Options: Select 'View All' to expand the Additional Options (optional).

- Revision Date: Defaults to current date.
- CPE Hours: If the course is tied to a professional certification and will count towards continuing professional education credits, enter the credit hours here. This field is used to capture all educational hour types.
- Contact Hours: This is the number of hours the learner is expected to be in contact with the instructor. Mainly used for onsite training (classroom, field training, etc.).
- Revision Number: If updating the course, then enter the revision number.
- Revision Time: Defaults to the current time based on the administrators' time zone in the LMS. Update if appropriate.
Select Save & Exit.

Save & Exit

6. Input ‘Additional Settings’ within the item.

**Note:** The screen is divided into four sections: Summary, Extended Summary; Design; and Process Control (fields explained below). Not all fields are applicable to all course types. To review all the fields and their definitions, refer to Page 43.

7. Utilize the Related Menu, similar to how it’s used in the creation of online and scheduled items to associate the item with assignment profiles, content, etc. **Note:** Some fields are not applicable to this type of item.

8. Utilize the Actions Menu, as outlined in previous sections, to edit the item.
Adding Assessments

Introduction

Assessments allow administrators to create and add quizzes or exams to test users' understanding of the courses taken.

Getting Started

Follow the path to create an assessment.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Content button > Assessments tab

Assessments

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

- Case sensitive search: [Yes] [No]
- Assessment Type: [Quiz] [Exam] [Both]
- Assessment ID: Starts With [ ]
- Assessment Name: Starts With [ ]
- Description: Starts With [ ]
- Status: [Active] [Not Active] [Both]

Add/Remove Criteria

Search | Add New | Reset

Process Overview

Follow the steps below to create an assessment.

Steps

1. Select Content button.

2. Select the Assessments tab.

3. Select Add New link.

4. Select the type of assessment, either a quiz or an exam, you wish to add.
Adding Quizzes or Exams: Once you have selected the option to add a quiz or an exam, the following steps should be executed. The below fields and screenshots depict the creation of a quiz:

a. Fill out the required fields and then select ‘create’:
   - Quiz ID: Start with your agency acronym.
   - Quiz Name: Name of the Quiz.
   - Locale: Defaults to English (only option).
   - Domain: Update to your agency, do not leave as Public.

b. Once created, select the ‘Menu’ tab on the top right to begin adding questions.
c. Once all the questions are added, save the quiz.

There are various settings that admins can configure for each quiz. To do so, select ‘Settings’ on the quiz menu.

**Common Assessment Questions:** There are a variety of ways questions and answers can be configured. Questions and answers can be randomized; learners can receive feedback on each question; learners can review the assessment at the end. Admins can turn these features on/off at the quiz level.

5. After the assessment (quiz or exam) has been created, you are now able to add the assessment to an item (course). To add the assessment, follow the steps below:
a. Search for the item (course) the assessment will be associated to.

- **Items**
  - Search:
  - [Saved Searches]

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

- **Case sensitive search:**
  - [Yes] [No]
- **Search All Locales:**
  - [Yes] [No]
- **Item Types:**
  - Starts With:
  - [▼]
- **Item ID:**
  - Starts With:
  - [▼]
- **Revision Date:**
  - [MM/DD/YYYY]
- **Revision Number:**
  - Starts With:
  - [▼]
- **Item Title:**
  - Starts With:
  - [▼]
- **Item Status:**
  - [Active] [Not Active] [Both]
- **Item Classification:**
  - Starts With:
  - [▼]
- **Online Settings:**
  - [Has online content]
- **Domains:**
  - Starts With:
  - [▼]
- **Sources:**
  - Starts With:
  - [▼]

- **Add/Remove Criteria**

b. Select the item.

- **COURSE DMS.ALL-10 (Rev 1 - 5/21/2019 12:44 PM)**
  - Communication Skills

- **Description:**
  - This workshop will help improve your communication skills.

- **Course Ratings:**
  - [Not yet rated]
  - [Edit]

- **Thumbnail File:**
  - [Assign File]
  - [Edit]

- **Assign, Type:**
  - [Remove]
  - [Edit]

- **Contact's Email:**
  - [Remove]
  - [Edit]

- **Related**
  - [More]
  - [Online Content]

- **Online Content**
  - [Title]

- **Catalogs**
  - [More]

- **Subject Areas**
  - [More]

- **Scheduled Offerings**
  - [More]

- **Segments**
  - [More]

- **Online Content**


c. After the item is open, go to the Related Menu and select ‘Add Online Content’.
d. Associate the content to the item. Select the green plus icon and select ‘Add Assessment’.

Add Assessment

- Required Field(s)
  - Assessment ID:
  - Assessment Name:

- Restrict access to other online item objects when this assessment is in progress
- Record learning event when assessment passed
- Record learning event when assessment failed

Review Options
- Enable Assessment Review

Add To Folder
- Save in Folder: Root Level

Changes will be saved when you click “Save” on the Online Content page.

OK Cancel

f. Once the assessment has been uploaded, the content will need to be launched.
g. Modify the settings and select ok button.

<table>
<thead>
<tr>
<th>Required Field(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Content is available for launch (available for users)</td>
<td></td>
</tr>
<tr>
<td>✓ Record learning event when all content is complete</td>
<td></td>
</tr>
<tr>
<td>✓ Content available only during specified segments of a scheduled offering</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Completion Status</th>
<th>Failure Status</th>
<th>Failure Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>COURSE-O (Completed) - Far Credit</td>
<td>COURSE-NS (No Show) - Not For Credit</td>
<td>Skip content structure page on launch</td>
</tr>
<tr>
<td>Available for Offsite Player download</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Days From Launch to Expiration: [000]

**Browser, AICC and SCORM**
- ✓ Allow users to review content from Completed Works
- AICC Max. Normal: 99

Changes will be saved when you click "Save" on the Online Content page.

[OK] [Cancel]
Create a Class

Introduction

Classes can be thought of as a graduation group, where everyone in the class will be graduating upon completion. Administrators can use a class in conjunction with a curricula or program. This feature is rarely utilized.

Getting Started

Follow the path to create a class.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Classes tab > Add New

Classes

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

Case sensitive search:  
- Yes   - No

Class ID:  
- Starts With

Description:  
- Starts With

Add/Remove Criteria

Search  |  Save As  |  Reset

Process Overview

Steps

1. Select the Learning button.

2. Select the Classes tab.

3. Select Add New.

4. Enter information about the class you are creating.
   a. **Class ID:** Enter a Class ID based off your agency’s naming convention.
   b. **Description:** Enter a description for the class.
   c. **Domain:** Enter or search for the Domain for your agency. Do not leave as public.
   d. **Curriculum:** Search and associate a curricula with the class.
   e. **Max Size:** Max size of the class.
   f. **Start Date:** Beginning date of the class.
5. Select Add.

6. To add scheduled offerings to the class, perform the following steps:

   **Adding a Scheduled Offering**
   
   a. Select the Offerings tab on the Classes page.

   b. Search for and add the scheduled offering you wish to add to the Class and select Auto Register to register the learners automatically.

   ![Add a Scheduled Offering to the Class](Image)

   Edit the Class

   **Scheduled Offering Charge Back Setting**: Not applicable.

   **Withdraw Rules**: Removes the associated items with the class from the Users’ learning plan.
Notification Rules: Sends email confirmations to the selected individuals.

Registration Rules

Registration Status: Active Enrollment (Enrolled)

Slots:
- Use a User’s organization’s reserved slot when possible
- Use a Group slot when possible

Scheduled Offering chargeback setting:
- No Charge

Withdraw Rules

Learning Plan:
- Remove associated items from Users’ learning plans

Notification Rules

Email confirmations to:
- User
- Instructor
- Supervisor
- Contacts

Select Apply Changes.

8. After configuring the above registration rules, the next steps would be to add users to the class.

Adding Users to a Class

a. Select the Users tab to add users to the class.

b. Search for the users which you want to add to a class.

Edit the Class

Add a User to the Class

Enter User ID or add one or more from list.

User ID: Add

Update the Users for the Class

Select Apply Changes

User ID         Name         Status         Remove
Lech, Biliana O   In Progress

Move to Another Class   Comments
Select All / Deselect All

C. Select the Apply Changes button.
Create a Group Instance

Introduction
Create a group instance to create a set of courses that have the same attributes. Courses that you are responsible for as an agency administrator or courses in the same location. This feature is rarely used and simply provides a different course grouping for administrators.

Getting Started
Follow the path to create a Group Instance.

Your path is…

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Group Instances tab > Add New

Group Instances
Search
Saved Searches

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

Case sensitive search: [ ] Yes [ ] No
Group Instance ID: [ ] Starts With
Description: [ ] Starts With
Add/Remove Criteria

Process Overview

Steps
1. Select the Learning button.
2. Select the Group Instances tab.
3. Select Add New.
4. Enter the basic information associated with the group instance.
   a. **Group Instance ID:** Enter a Group Instance ID based on your agency’s naming conventions.
   b. **Description:** Optional. Explain to other administrators what these offers have in common.
   c. **Curriculum:** Optional. If curriculum is associated to the class, select the search picker and search for and select the applicable curriculum.
   d. **Start Date:** Optional. Beginning date of the Group Instance.
   e. **End Date:** Optional. End date of the Group Instance.
5. Select Add.

6. Add scheduled offerings that you want to group together.

**Adding a Scheduled Offering**

a. Select the Offerings tab on the Group Instances page.

b. Search for and add the scheduled offering you wish to associate with the instance and that you want to group together.

Edit the Group Instance

Add a Scheduled Offering to the Group Instance

Enter Scheduled Offering ID or [Add one or more from list]

Scheduled Offering ID:

Update the Scheduled Offerings for the Group Instance

<table>
<thead>
<tr>
<th>Scheduled Offering ID</th>
<th>Item</th>
<th>Description</th>
<th>Start Date/Time</th>
<th>End Date/Time</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>261</td>
<td>COURSE DMS_Supervisor_Basics</td>
<td>Supervisor Workshop: The Basics</td>
<td>10/25/2019 09:00 AM America/Chicago</td>
<td>10/25/2019 12:00 PM America/Chicago</td>
<td></td>
</tr>
</tbody>
</table>

C. Select Add.
Create a Catalog

Introduction
Catalogs control which courses an employee can search and register for. Learners for a Catalog are assigned via the associated assignment profile(s). Your agency catalog will be assigned to all employees and should not be edited. Additional catalogs can be created to assign courses to targeted employee populations. Employees will only see one catalog which will contain all courses that have access to even though they may have multiple catalogs assigned to them.

Getting Started
Follow the path to create a catalog.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Catalog tab > Add New

Catalogs

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

Case sensitive search:  
- Yes  
- No

Catalog ID:

Description:

Active:

- Active  
- Not Active  
- Both

Add/Remove Criteria

Steps
1. Select the Learning button.

2. Select the Catalogs tab.

3. Select Add New.

4. Enter information about the catalog you are creating.
   a. Catalog ID:
      Enter a Catalog ID using your agency’s standard naming convention.
   b. Description:
      Optional. Enter a description for the catalog.
   c. Domain:
      Enter or search for the Domain for your agency.
   d. Contact Email:
      Enter the address for the person in charge of the catalog.
Learning Management System: Learning Administrator User Guide

5. Select Add.

6. Utilize the Related Menu to associate the Catalog with an Item

Adding Items to a Catalog

a. Select the green plus icon to add an item to a catalog.

b. Search for the item you wish to add to the Catalog.
c. Complete the dropdown fields as appropriate:
   - Flag – Display course in Catalog as Featured, New or Revised.
   - Until – Pick date for flag to expire.
   - Reason – Enter the reason you selected the flag.
   - Expires – Pick date when course will expire from catalog.
   - Search Tier – Defaults to blank. The most important tier is 1 with the lowest tier being 5.
   - *Search Weight – Defaults to 1.

7. Utilize the Related Menu to associate the Catalog with a curricula. When you add curricula to a course catalog, you are simply associating existing curricula with an existing catalog, so both the catalog and the curricula must exist already.

### Adding Curricula to a Catalog

a. Select the green plus icon to add a curricula to a catalog.

b. Search for the curricula you wish to add to the Catalog.

c. Complete the dropdown fields as appropriate:
   - Flag – Display course in Catalog as Featured, New or Revised.
   - Until – Pick date for flag to expire.
   - Reason – Enter the reason you selected the flag.
   - Expires – Pick date when course will expire from catalog.
   - Search Tier – Defaults to blank. The most important tier is 1 with the lowest tier being 5.
8. Utilize the Related Menu to associate an assignment profile with a Curricula. Before you can assign a catalog to learners, you must create both the catalog and the assignment profile before assigning courses to a catalog for registration.

**Adding an Assignment Profile to a Catalog**

a. Select the green plus icon to add an assignment profile to a catalog.

b. Search for the assignment profile you wish to add to the Catalog.

c. Select the assignment profile you added to ensure the assignment profile shows the catalog which it's now associated with.

9. If applicable, utilize the Related Menu to associate the Catalog with a collection. Manage the collections in a catalog to control which users can look up and view collections of links.

**Related**

- Items
- Curricula
- Assignment Profiles

**Collections**

**Adding a Collection to a Catalog**

a. Select the green plus icon to add an assignment profile to a catalog.
b. Search for the collection you wish to add to the Catalog.

### Collections

- **Case sensitive search:**
  - [ ] Yes
  - [ ] No
- **Search All Locales:**
  - [ ] Yes
  - [ ] No
- **Collection ID:**
  - Starts With
  - [ ] DMS
- **Collection Title:**
  - Starts With
- **Collection Status:**
  - [ ] Active
- **Collection Creator Type:**
  - Admin
- **Domains:**
  - Starts With

Add/Remove Criteria  
Search

c. Select Add.

10. Utilize the Related Menu to associate the program with a catalog. Add programs to a catalog so that users can find and assign themselves programs and supervisors can assign programs to employees.

### Adding a Program to a Catalog

a. Select the green plus icon to add a curricula to a catalog.

### Programs

b. Search for the curricula you wish to add to the Catalog.

### Programs

- **Keyword:**
  - 

Add/Remove Criteria  
Search  
Reset

c. Complete the dropdown fields as appropriate:

- **Flag** – Display course in Catalog as Featured, New or Revised.
- **Until** – Pick date for flag to expire.
- **Reason** – Enter the reason you selected the flag.
- **Expires** – Pick date when course will expire from catalog.
- **Search Tier** – Defaults to blank. The most important tier is 1 with the lowest tier being 5.
- **Search Weight** – Defaults to 1.
Create a Program

Introduction

Programs combine learning events to create a set of learning experiences that learners progress through, i.e., learning path. Content within a program can be taken in any order. The below steps will take you through the process of building a program.

Getting Started

Follow the path to create a program.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Programs tab > Add New

Process Overview

Steps

1. Select the Learning button

2. Select the Programs tab.

3. Select 'Add New'.

4. Enter information about the program:

   Program ID: Be sure to include the agency acronym first and use the agencies agreed upon naming convention.

   Title: Enter the title for the program (what learners will see).
Description: Optional. Enter a description for the program.

Domain: Enter or search for the Domain for your agency.

Assignment Type: Choose from Optional, Recommended, or Required.

Type: Choose from scheduled, duration-based, or open-ended.

Status: Defaults to active

Completion: Select PROGRAM-C (Completed) For Credit.

Program Restriction: Controls how a learner navigates through the program (select to force completion of one section, before the next section is presented to the learner).

Add New Program

Select Create Program.

6. Add items to the program which you would like to be bundled within the program.

While in the program, select the edit icon on the Agenda tab.

7.
8. Follow the “wizard” to add items or activities to the program.

Agenda

9. To add assignment profiles to the program, perform the following steps:
   a. Select the Users button.
   b. Select the Assignment Profiles tab.
   c. Select the Assignment Profiles tab.
   d. Select the appropriate assignment profile.
   e. In the Related Menu within the assignment profile, select Programs.
   f. Select the green plus sign to search and add a program to the assignment profile.
g. Search and select the program you wish to assign.

<table>
<thead>
<tr>
<th>Program ID</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>DMS_UserGuide</td>
<td>DMS User Guide Test</td>
</tr>
</tbody>
</table>

h. Propagate the assignment profile to assign the program.

i. If the status of the program within the assignment profile reads ‘valid’ then the program was successfully added.
Create a Curricula

Introduction
A curriculum is a set of one or more items that learners must complete in order to be compliant or remain compliant in a certain area. Unlike programs, curricula support retraining and courses can be taken in any order. Items bundled within the curricula can have different due dates.

Getting Started
Follow the path to create a program.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Curricula tab > Add New

Curricula

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

Search
Add New

Process Overview

Steps

1. Select the Learning button

2. Select the Curricula tab

3. Select ‘Add New’

4. Enter information about the curricula:

   Program ID: Be sure to include the agency acronym first and use the agencies agreed upon naming convention.

   Title: Enter the title for the curricula (what learners will see).
Description: Optional. Enter a description for the curricula.

Creation Date: Defaults to the current date.

Active: Defaults to active.

Domain: Enter or search for the Domain for your agency.

Curriculum Type: Select the most appropriate subject area that the curriculum will fall under.

Priority: Select from 1, 2, or 3. One being the highest priority.

Force Incomplete: Controls when the overall status of the curriculum (complete or incomplete) based on a learner's most recent attempt at completing any one item in the curricula. If checked, and the learner fails the most recent attempt at completing the item, then the system resets the status of the entire curriculum to incomplete.

5. Select Add

6. Add items to the curricula which you would like to be bundled within the curricula.
a. In the Related menu, select the Contents tab.

b. Select Edit.

c. Select the green plus sign and select Items to search for items to add to the curricula.

d. Search for and add the items you wish to add to the curricula.

7. After adding all the desired items, configure the due dates and retraining dates for each item by doing the following. There are two options for which you can base retraining on: **Event Basis** (creating annual retraining requiring learners to complete the item year beginning on the date that they last completed the assignment. The other option is **Calendar Basis** (creating retraining based on a fixed date when all users must complete their training on the same date, regardless of when it was originally assigned.)
a. While still in the Edit Contents window, select the Edit link next to the item. 

Creating Annual Retraining Period Based on a Users’ Completion Event.

After selecting the edit link above, complete the fields within the window. As described below:

Initial Number: Enter a numerical value that sets the time period for users to complete the assignment the first time. Example: If you want learners to complete the course in 30 days, set the initial number to 30.

Initial Period: The unit of time that the initial number is associate with. Options include days, weeks, or years. Continuing with the above example, select days in order to give learners 30 days to complete the item.

Initial Basis: Select Event for this example. The initial due date will be based on the date when the event (usually assignment date) happened.

Previous Completions: If not checked, the LMS will look for the item in the whole learning history of the user. If checked, this limits how far the system will look at the learning history to check if the item has already been completed.

Required Date Basis: Recommend selecting assignment date. Note: if hire date is selected, the system will calculate the due date for some learners as 30 days from their agency hire date. This selection would then put a lot of learners as overdue, since their hire date may have been years ago.

Retraining Number/Period: Enter a numerical value that indicates when the training needs to be completed again and the unit of time.

Retraining Basis: Select Event. Example: If the last completion was recorded on May 01, 2019 and the retraining is required every 30 days (retraining number/period), the next due date will be on May 31, 2019.

Basis Date: Not applicable for event-based retraining’s.

Effective Date: This is the start date when the system will include the item as part of the curriculum completion. Effective dates in the past will make all learners appear overdue. If the effective date is in the future, learners who are currently compliant and will stay compliant until the effective date arrives.

Creating Annual Retraining Period Based on a Fixed Date.

After selecting the edit link as outlined in step a, complete the fields within the window. As described below:
Initial Number: Enter a numerical value that sets the time period for users to complete the assignment the first time. Example: If you want learners to complete the course in 30 days, set the initial number to 30.

Initial Period: The unit of time that the initial number is associate with. Options include days, weeks, or years. Continuing with the above example, select days in order to give learners 30 days to complete the item.

Initial Basis: Select Calendar.

Threshold: Only applicable for calendar-based curricula. Controls a “grace period” for an item’s due date. Threshold is a number of days before the end of the initial period. If users receive this assignment before the threshold, they must complete it within the current initial period. If they receive this assignment after the threshold, they must complete it in the next initial period.

Previous Completions: If not checked, the LMS will look for the item in the whole learning history of the user. If checked, this limits how far the system will look at the learning history to check if the item has already been completed.

Required Date Basis: Ignore this setting.

Retraining Number/Period: Enter a numerical value that indicates when the training needs to be completed again and the unit of time.

Retraining Basis: Select Event. Example: If the last completion was recorded on May 01, 2019 and the retraining is required every 30 days (retraining number/period), the next due date will be on May 31, 2019.

Basis Date: select the day before (because calculations are based on midnight) the fixed calendar date in the year that you want initial and retraining periods to begin. The system will create intervals starting with the specified Basis Date using the defined period.

If the basis date is 01-Feb-2019 and the retraining is required every 30 days, the next due dates would be 3-Mar-19, 2-Apr-19, and so on, for all users independent of their last retraining completion.

Effective Date: This is the start date when the system will include the item as part of the curriculum completion. Effective dates in the past will make all learners appear overdue. If the effective date is in the future, learners who are currently compliant will stay compliant until the effective date arrives.

8. Select ‘Apply Changes’ to finalize the above settings.

9. A curricula can be added to catalogs by selecting the green plus sign and searching for the catalog.
Create Requirements

Introduction

Learning requirements are a set of conditions that users must meet to receive a completed curriculum status when you create a requirement-based curriculum. Requirements are ONLY used for curricula. If you are not using curricula, you would not create requirements.

Getting Started

Follow the path to create requirements.

Your path is…

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Requirements tab > Add New

Requirements

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

Case sensitive search:  

Option:  

- Yes  
- No

Requirement Type:  

Starts With  

ID:  

Starts With  

Status:  

- Active  
- Not Active  
- Both

Process Overview

Steps

1. Select the Learning button.

2. Select the Requirements tab.

3. Select Add New.

4. Enter information about the requirements you are creating.

   a. Requirement Types:  
      
      Select from the dropdown based on the type of requirement you want to create:

      Number of Hours of Specified Hours Type: Use this when you are concerned about the number of hours and the type of credit required for users to complete the assigned curriculum, but you want to allow users to fulfill those hours from any learning item (course) in the curriculum.
Number of Hours of Specified Hours Type from a Pool of Items: Use this requirement if you want to limit the options of the user to only a subset of courses.

Number of Items for a Pool of Items: Use this requirement type, learning requirement type when you can identify a group of items of similar weight that can easily be exchanged. With this requirement, users are required to complete a minimum number of learning items from a pool of items.

b. Description: Optional. Enter a description for the requirement.

c. Domain: Enter or search for the Domain for your agency.

d. Curriculum: Optional. Search and associate a curricula with the class.

e. Creation Date: Automatically populates to current date.

f. Active: Automatically checked, makes the requirement active.

**Requirements**

> Add New> Summary

**Add New Requirement: Summary**

* = Required Fields

- **Requirement Type:**
  - [ ] Items from Pool of Items

- **ID:**
  - [ ] DMS_SuppCurricula_Requirements

- **Description:**
  - 

- **Domain ID:**
  - [ ] DMS

- **Creation Date:**
  - (MM/DD/YYYY)
  - 10/7/2019

- **Active:**
  - [ ]

5. Select Next.

6. Update the type of hours and number of hours that you want to base the requirement on and select Add.

**Add New**

**Requirements**

> Add New> Summary

* = Required Fields

- **Hour Type:**
  - [ ] Contact Hours

- **Required Hours:**
  - [ ] 8.00

7. Once the requirement has been created, associate the requirement with the appropriate curricula. To add the requirement to a curricula, complete the following.
a. Select the Learning button.

b. Select the Curricula tab.

c. Search for the curriculum you wish to add the requirement to.

d. In the Related Menu, within the curriculum, select the ‘Contents’ tab.

e. Select the Edit Button.

f. Select the green plus sign and select ‘Requirements’.
g. Search for and add the requirement.

Add Requirements

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>DMS_SupCurricula_Requirements - 8.00 Contact Hours</td>
<td></td>
</tr>
</tbody>
</table>
Create Questionnaire Surveys

Introduction

Questionnaire Surveys do not test the objectives or knowledge gained by a learner after completing a course, rather surveys are used to gather employee feedback for completed courses and to assess long-term retention and application of these acquired skills. You can assign them to learners after course completion to give them an opportunity to evaluate their experiences with the course. You can also assign questionnaire surveys to (for example) a supervisor who can evaluate the employee's retention of what was learned in the course.

Getting Started

Follow the path to create questionnaire surveys.

Your path is…

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Questionnaire Surveys tab > Add New

Process Overview

Steps

1. Select the Learning button.

2. Select the Questionnaire Surveys tab.

3. Select Add New.
4. Enter information about the survey you are creating.

a. **Survey ID:** Create a Survey ID, using your agency acronym, based on your agency’s naming convention.

b. **Name:** Input a title for the survey (what learners will see.)

c. **Evaluation Level:** Select either:
   - **Item Evaluation: User Satisfaction** - select this option if you want to build a user satisfaction survey to hear from participants about their experience in the course.
   - **Follow-Up Evaluation: Application of Learning** - Select this option if you want to build a survey that asks observers to comment on changes in behavior after the learner completes a class.

d. **Description:** Optional. Enter a description for the survey.

e. **Comments:** Comments box is used to identify the purpose or intent of the record

f. **Domain:** Enter or search for the Domain for your agency.

g. **Active:** Automatically checked, makes the survey active.

---

**Questionnaire Surveys**

> Search > Add New

**Add the Survey**

* Required Fields

- **Survey ID:** DMS-SupervisoryBasics-Survey
- **Name:** Survey about the Supervisory Basics Course
- **Evaluation Level:** Follow-Up Evaluation: Application of Learning

**Description:**

- Created on 10 07 2019

**Comments:**

- Created for the purpose of measuring the application of learning after the completion of the Supervisory Basics training

- **Domain:** Personal Development
- **Active:**

**Select Add.**

Add Reset
6. Add the survey questions:

   a. While in the survey you can create/modify questions by selecting the Questions tab.

   b. In Survey Instructions, type an introduction to explain the purpose of the survey and how this data will be used.

      **Survey Instructions:**
      This survey will measure the effectiveness of the supervisory training.

   c. Select the add pages icon ( ) to divide the survey into sections.
      - For satisfaction surveys, consider adding a few pages and focusing on each element of the experience.
      - For follow-up surveys, consider adding a page for each behavior or skill.

   d. Define the page that you added.

      **Resource Type:** For satisfaction surveys, select the resource type that the questions on the page apply to. Admins can create a page to measure satisfaction with the instructor, and so they select Instructor in Resource Type.

      **Title:** Add a title for the page.

      **Instructions:** Include instructions for the page (why is this page important or what this measures.)

   e. Select the add question button ( ) to add the question. Questions can be multiple choice, rating scale based, open-ended, or one choice. Helpful tip: select ‘Save Draft’ to save questions as you continue adding them.

   f. When you finish adding questions, select Preview.
g. Once ready to publish the survey, select Publish.

7. After publishing the survey, you can add it to a course.
   a. While in the survey you are wanting to create/modify, select the 'Item Usage' tab.

   **Item Usage**

   b. Search for the Item (course) you want associated with the survey.

<table>
<thead>
<tr>
<th>Item</th>
<th>Assigned</th>
<th>Completions</th>
<th>Percentage</th>
<th>Mean Score</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>COURSE DMS LH 2554 (Rev 1 - 10/15/2009 00:00 PM)</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>America/New York</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   c. Select Add.

8. Edit survey details based on your agency's needs.
   a. While in the survey you are wanting to create/modify, select the 'Options' tab.

   **Options**

   b. Edit the number of days after completion that you want the survey to be assigned and how many days learners have to complete the evaluation.

   c. Who must complete the survey?

   d. Who is required to complete the survey?

   e. Include a comments field for each question?

   f. Select ‘Apply Changes’.

9. **Notifications**: When used, users receive notification email messages when they are assigned a survey. We recommend not editing the email template in the ‘Notifications’ tab, as it is in html format.
Adding External Links

Introduction

External links can be established when administrators want to link and track online content that is housed outside of the learning management system. Links can be assigned to users directly or added to a collection.

Getting Started

Follow the path to create external links.

Your path is…

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > External Links tab > Add New

External Links

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

Case sensitive search:  ○ Yes  ○ No
Title:  Starts With
External Link Status:  ○ Active  ○ Not Active  ○ Both
URL:  Starts With

Add/Remove Criteria

Steps

1. Select the Learning button.

2. Select the External Links tab.

3. Select Add New.

4. Enter information about the external link you are creating.
   a. URL: Enter the URL for the content.
   b. Title: Enter a title for the external link you are creating.
   c. Description: Optional. Enter a description of the content.
   d. Domain: Enter or search for the Domain for your agency.
e. **Active:** Automatically checked, makes the requirement active.

5. **Select Add.**

6. **Send (recommend) the external link to a user.**

   a. While in the external link you are wanting to recommend, select the Recommend button.
b. Search and Add Users that will receive the link directly.

**Search & Add Users**

User ID: [ ]

Add

**List of Selected Users**

<table>
<thead>
<tr>
<th>User ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mendakonis, Briana G</td>
</tr>
</tbody>
</table>

Remove

c. Select Next.

Next

d. Select Scheduled Job.

Schedule Job

e. Select ‘Run this job immediately, if allowable.’

Schedule Background Job

The action you are trying to perform is affecting too many records and could take a long time. Please complete the following information if you wish to run the job now:

- [ ] Run this job immediately, if allowable.
- [ ] Schedule this job to be executed on: View Available Time Slots

f. Select ‘Finish’.

Finish

g. The external link will be visible on the learner’s homepage. Housed in the ‘Recommendations’ window.
Adding Collections

Introduction
A collection is a group of websites that you want to recommend to users. Administrators control the collection with these settings. All external links should be previously uploaded within the LMS.

Getting Started
Follow the path to create a collection.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Home navigation dropdown menu > Learning Administration > Learning button > Collections tab > Add New

Collections

Search
Add New

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

Case sensitive search:  ○ Yes  ○ No
Search All Locales:  ○ Yes  ○ No
Collection ID:  Starts With
Collection Title:  Starts With
Collection Status:  ○ Active  ○ Not Active  ○ Both
Collection Creator Type:  ○ Admin  ○ User  ○ Both
Domains:  Starts With
Collection Catalog Status:  ○ Published  ○ Not Published  ○ Both

Add/Remove Criteria

Process Overview

STEPS

1. Select the Learning button.

2. Select the Collections tab.

3. Select Add New.

4. Enter information about the collection you are creating.
a. **Title:** The title of the collection, this title will appear on the learners
Recommended tile.

b. **Description:** Optional. Enter a description of the collection.

c. **Domain:** Enter or search for the domain for your agency.

d. **Active:** Automatically checked. Recommendation: do not set it to active.
By keeping it inactive, you assure that users cannot see it until you are finished configuring it.

5. Select Create.

6. Add new entries (links) to the collection.
   a. Select ‘Add New Entry’.
   b. Choose between adding a New Link; Add Existing Link (an external link that
has been previously uploaded in the system); or “Add Online Item”.

```
Add New Entry
What would you like to add to your collection?

Add a New Link  Add Existing Link  Add Online Item
```
c. Insert the link to add to the collection, or search for existing link within the system.

Add New Entry
What would you like to add to your collection?

Add a New Link  Add Existing Link  Add Online Item

7. Relate the collection to a catalog:

a. Search for the catalog to add the collection to.

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

Case sensitive search:  Yes  No
Catalog ID: Starts With
Description: Starts With
Active:  Active  Not Active  Both

Add/Remove Criteria

b. In the Related Menu, select the Collections tab.

Related
Items
Curricula
Assignment Profiles
Collections
Programs

c. Select the green plus icon to add a collection.

Collections

Collections

7. Relate the collection to a catalog:

a. Search for the catalog to add the collection to.

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

Case sensitive search:  Yes  No
Catalog ID: Starts With
Description: Starts With
Active:  Active  Not Active  Both

Add/Remove Criteria

b. In the Related Menu, select the Collections tab.

Related
Items
Curricula
Assignment Profiles
Collections
Programs

c. Select the green plus icon to add a collection.

Collections

Collections
Create Tasks

Introduction

A task is something that you expect a user to demonstrate after they complete training. They are used with task checklists. An example of how you would use tasks, is if you have physical standard operating procedures, each step in the procedure can be a task. Tasks are best used when associated with an ‘other’ item type.

Getting Started

Follow the path to create a task.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Tasks tab > Add New

Tasks

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

Case sensitive search:  
- Yes  
- No

Task ID:  
Starts With

Task Description:  
Starts With

Task Status:  
- Active
- Not Active
- Both

Add/Remove Criteria

Process Overview

STEPS

1. Select the Learning button.

2. Select the Task tab.

3. Select Add New.

4. Enter information about the task you are creating.
   a. Task ID:  
      Create a Task ID based on your agency’s naming convention.
   b. Description:  
      Optional. Enter a description that illustrates what the task is doing.
   c. Domain:  
      Enter or search for the Domain for your agency.
d. **Active:** Automatically checked, makes the task active.

5. After the basic information has been entered, admins now can add competencies, items, and documents to the task.

6. After the task has been created, admins can associate it with various aspects of the system. Such as adding the task to an item. Add the task to an item by performing the following steps:
   a. Select the Learning button.
   b. Select the Items tab.
   c. Search for and select the previously created item which you want to associate the task with.
d. In the Related Menu, select the Tasks tab.

e. Select the green plus icon to search for the desired task.

f. Search for and add the task.


g. Save the update.
Learning Tools Menu

Introduction
The learning tools menu enables administrators to control various aspects of the courses within the system. The below section will provide an overview of all the functionality housed within this menu.

Getting Started
Follow the path to go to the tools menu with the learning page.

Your path is...
People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Learning button > Tools tab > Add New

Tools Menu Overview

Tools Overview
1. Select the Learning button.
2. Select the Tools tab.
3. Select the applicable tool based on the action you want to execute.
Close Scheduled Offering: Closing a class (scheduled offering) indicates that you have recorded attendance and completion statuses for all who attended the class.

1. Select the ‘Close Scheduled Offering’ option within the Tools menu.

2. Search for the scheduled offering to close. Utilize the search picker ( ) to search the course by a name/keyword.

3. Enter the date that you want to use as the close date.

4. Select Next.

5. Go through the ‘wizard’ and complete the closure of the class.

Cancel Scheduled Offering: Admins can cancel a scheduled offering ONLY for scheduled offerings that are future dated.

1. Select the ‘Cancel Scheduled Offering’ option within the Tools menu.

2. Search for the scheduled offering to cancel. Utilize the search picker ( ) to search the course by a name/keyword.

3. Enter the date that you want to cancel the class. You must select a date (today's date appears by default) that you want to cancel the scheduled offering.

4. Select Next.

5. Select Next to skip over the costs step, since there is no cost associated with the courses.

6. Select the type of notifications you want to automatically send.

7. Select Next.

8. Review and select Finish.

Curriculum Scheduling: Use to create scheduled offerings for the instructor-led and blended times in a curriculum.

1. Select the ‘Curriculum Scheduling’ option within the Tools menu.
2. Search for the curriculum to cancel. Utilize the search picker (🔍) to search the curricula by a name/keyword.

3. Enter scheduling information (including the start date and time, time zone, and domain ID) that the system uses to create scheduled offerings in the curriculum.

4. Select Next.

5. If a class is associated with the curriculum, select next.

6. Select ‘Finish’.

**Registration Assistant:** Use this to register users in, withdraw users from, and reserve registration slots in a scheduled offering.

1. Select the ‘Registration Assistant’ option within the Tools menu.

2. Select the radio button of the action you want to execute: ‘Withdraw Users, Reserve Slots, or Register Users’.

3. Search for the scheduled offering. Utilize the search picker (🔍) to search the course by a name/keyword.

4. Select Next.

5. Search for the users to Add/Withdraw/Slots to reserve etc.

6. Select ‘Finish’.

**Required Dates Editor:** Use this to set new required dates by which users must complete all free-floating items or curriculum items.

1. Select the ‘Required Dates Editor’ option within the Tools menu.

2. Search and select via ‘Add Users’.

3. Search for the curriculum. Utilize the search picker (🔍) to search the curriculum by a name/keyword.

4. Select Next.

5. You can add one or more “free-floating” items by selecting an item type and entering an item ID or by selecting add one or more from list.

6. Select Next.

7. Input the required date(s).

8. Select ‘Finish’.
Scheduled Offering Notification: Notifies users, supervisors, instructors, and other contacts that you scheduled an offering. Users, supervisors, instructors, and other contacts receive different notifications depending on each user's current registration status (Registered, Pending, Waitlisted, Withdrawn, or Canceled) for the scheduled offering.

1. Select the ‘Scheduled Offering Notification’ option within the Tools menu.

2. Search and select via ‘Add Users’.

3. Search for the scheduled offering ID. Utilize the search picker ( ) to search the Scheduled Offering ID by a name/keyword.

4. Select Next.

5. Select the types of people (users, instructors, supervisors) you would like to notify.

6. Select ‘Finish’.
Reports Overview

Introduction

Administrators have the option to run reports to gather data from the LMS. Reports cannot be modified, and those with a “trainer” role will not have access to the full reports list. However, there are many standard reports that Administrators can use, to assist in gathering any information to meet your agency needs.

Getting Started

Follow the path to go to the Reports page.

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Primary navigation dropdown menu > Learning Administration > Reports button

1. Select the Reports button.

2. Search for the report you wish to run or scroll through the list of reports.
3. Once you have entered the report to search for, select the “Submit”.

4. Select the report that you wish to run.

5. Some report provides you with the option to filter out and narrow your report criteria.

6. Select ‘Run Job’ to run the report immediately.

7. The report will generate in a new window.

8. After the report has been generated, either open or save the report to your computer.

For an overview of all the reports in the system and a description of the data the reports pull, visit:

https://www.dms.myflorida.com/content/download/146580/977396/Standard_list_of_reports_in_LMS.pdf