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Learning Management System Agency Trainer User Guide Overview

Overview
This user guide outlines the key features and functionalities of the People First Learning Management System (LMS) for employees who have been designated by their agency as a trainer. Trainers must work in coordination with their agency administrators for many of the below actions to take place, for example, in order for a trainer to attach content to a course, an agency administrator must have previously uploaded the content it into the LMS.

My Classes

Introduction
The below section provides an introduction and overview of the key functionality of the My Classes section, housed in the Learning Homepage.

Getting Started
Follow the path to access the My Classes

Your path is...

People First Login page > Manager or Employee Landing page > Talent Management tile > Talent Management Home page > Learning > My Classes

My Classes Page Overview

Scheduled Classes tab: appears in the top of the My Classes screen. This tab includes all the future scheduled offerings that you have been assigned as an instructor for. Selecting the course will provide specific details related to the scheduled offering.

Past Classes Tab appears in the top of the My Classes screen. If selected, this tab lists all the past scheduled offerings that you were an instructor for.

Authorized to Teach appears in the top of the My Classes screen. If selected, this tab lists all the courses that you have been designated by your agency administrator as authorized to teach the course.
Record Completions button appears within the Authorized to teach tab and allows you to easily record course completions for scheduled offerings which you taught previously.

Learning Administration: Home Page Overview

Introduction
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 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
Learning Management System: Trainer User Guide

you can search for learning items (courses), curricula, programs, and create scheduled offerings.

**Content button** appears in the top menu section of each page. Selecting this link takes you to the Content page where you can search for the content that was previously uploaded by an agency administrator.

**References button** appears in the top menu section of each page. Selecting this link allows you to search for global references such as Facilities and Locations, previously created by agency administrators that can be added when creating a scheduled offering.

**Reports button** appears in the top menu section of each page. Selecting this link allows you to process and schedule 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 trainers 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 a trainer!

**Quick Links section** appears in the bottom section of the home page. In this section, you can create your own quick links for actions you frequently use. Changing this selection will only impact your default quick links and will not impact other trainers in your agency.
Learning Administration: Users Page Overview

Introduction
When it's time to perform user-related tasks such as searching for a user, searching for assignment profiles, 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 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 learners within your agency. After selecting a learner, you can view their details, related learning items, and perform learning related actions (assign learning, register learners, 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 search for assignment profiles created by your agency administrator.

**Tools tab** appears in the tab menu on the Users page. Selecting this tab displays user-related tools that allow you to administer learning.
Learning Administration: Learning Page Overview

Introduction
When it is time to search for a learning item or create a scheduled offering, trainers should 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 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 (previously created by an administrator).
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 group instances; which are a set of courses that have the same traits. For example, classes held in the same region.

Catalogs tab appears in the tab menu on the Learning page. Catalogs allow learners to search for and self-assign courses. Selecting this tab allows you to search for catalogs that items are published to.

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 programs and view all the items bundled within the program. Trainers can also assign a program to a learner.

Curricula tab appears in the tab menu on the Learning page. Curricula is defined as a set of one or more courses that learners 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 view all items bundled within a curricula. Trainers can also assign a curricula that was created by an agency administrator to a learner.

Requirements tab appears in the tab menu on the Learning page. Requirements are defined as a set of conditions that learners must meet to receive a complete curricula status (only applies to requirement-based curricula). Selecting this tab allows you to search for requirements and the curricula it is assigned to.

Questionnaire Surveys tab appears in the tab menu on the Learning page. Questionnaire Surveys are defined as an assessment that gathers learner feedback for completed courses. Selecting this tab allows you to search for and edit 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 the DMS People First Team.

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. Trainers can send (recommend) the previously created external links to learners.
**Collections**

*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 learners, which will appear in the learner’s Recommendations tile. Selecting this tab allows you to search for all collections and view the external links bundled in the collection.

**Tasks**

*Tasks tab* appears in the tab menu on the Learning page. A task is a learning activity that you will assign to a learner to perform in front of an observer. Selecting this tab allows you to search for tasks and view the items associated with the task.

**Tools**

*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.
Learning Administration: Content Page Overview

Introduction
When it is time to create an assessment, add documents, and create course objectives the content page should be utilized. 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

Below is an overview of the Content Page:

Questions Library tab: Legacy function tied to exams and should not be used. Utilize the Assessments page to create questions.

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

Questions tab: Legacy function tied to exams and should not be used. Utilize the Assessments page to create questions.

Exam Objects 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 trainers to import questions and edit printed exam templates.

Documents tab appears in the tab menu on the Content page. Allows trainers to create document items that link to external content (internet). Documents can be linked to a course.
Now, this guide will transition into specific functionality and step-by-step processes that you will most likely perform in your role as a Trainer.

# 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 for 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’s (learner’s) record:

**Steps:**

1. After following the above path, the system will default to the Users tab.

2. Enter in employee’s information in one of the search fields. Trainers can Add/Remove search criteria or set additional filters for applicable fields, by utilizing the “Add/Remove Criteria” option, as well as the blue filter buttons.

**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.
3. Select Search.

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

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

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

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

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

**Curricula:** Provides trainers with a view of curricula that are currently assigned to the learner as well as add a curricula for the specific learner (use the green plus to add curricula ( )).

**Programs:** Provides trainers with a view of programs that are currently assigned to the learner. Programs must be added in the program tab, they cannot be added to a learner within this tab.

**Assignment Profiles:** Provides trainers with a view the assignment profiles the learner is assigned to.

**Phone Number:** Provides trainers with a view of the learner’s phone number, as reflected in People First (for employees).

**Registration:** Provides trainers with a view of the scheduled offerings the learner has registered for.

**Requests:** Provides trainers with a view of the item training requests that the learner has submitted.

**Online Status:** Provides trainers with a view of the learner’s activity within an online item that they have registered for or have been assigned.

**Catalogs:** Provides trainers with listing of the catalogs the learner is assigned to.

**Preferences:** Provides trainers with a view of the pre-configured and standardized preferences established in the system, e.g., time zone.

**Approvals:** Provides trainers with a view and status of approvals that have been submitted by the learner to participate in a course.

**Surveys:** Provides trainers with a view of all the surveys that have been assigned to the learner and the ability to remove them from the learner’s To-Dos.

**Groups:** Provides trainers with a view of the groups that the learner is associate with.
7. The Actions Menu located at the top right of the user’s profile provides trainers with a training registration assistance options.

- **Registration Assistant**: Applies only to classroom trainings. Allows trainers to remove the user from a training, reserve a slot in a training, and register the user for a training.

- **Assign Learning Needs**: Applies only to online trainings. Allows trainers to assign or remove training, curricula and programs to users.
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

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, scheduled c items, scheduled offerings or external event to be recorded for each, and specify the users & fields.

What kind of learning you want to record?

- Item  ○ Scheduled Offering  ○ External Event

Search & Add Items

- Item Type ID: 
- Item ID:  

List of Selected Items

Record Learning-Multiple: Allows trainers to record course completion for users in bulk, when the completion is not being recorded in the course itself (i.e., scheduled offering). This option is useful when wanting to record attendance for learners who did not sign up for the scheduled offering but successfully completed the course.

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.
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: [Field]
   
   * Item ID: [Field] Add

   **List of Selected Items**

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: [Field] Add

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

6. Select the instructor who taught the course (must be previously added).

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**
   
   [Assess based on item setting] [Assess all items] [Do Not Assess]

9. Select Submit

   **Submit**

   **Note**: As mentioned previously, completions for offerings previously held, can also be recorded in the 'My Classes' tab in your Learning Homepage.

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

   1. Select Learning Event Editor in the Tools Menu.
      
      **Learning Event Editor**
      
   2. Search for the learner you are editing the event on behalf of.
3. Select the course that you would like to edit on behalf of the learner.

<table>
<thead>
<tr>
<th>User Name</th>
<th>ID</th>
<th>Description</th>
<th>Completion Date</th>
<th>Completion Status</th>
</tr>
</thead>
</table>

4. Update the fields as necessary.

5. Select Apply Changes.

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


2. Select the Management Action, then select Next.
3. Select “add one or more from list” to search for and add the user(s) who you would like to perform the action on, then select Next.

4. Search for and select the online based content you are seeking to add or remove. You can always select “add one or more from list” to search for the content. Then select Next.

5. Edit Assign Dates and priority, if applicable.

6. Select ‘Run Job Now’.

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

**Recommended External Links:** Allows trainers 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’, then select Finish
**Assign Task Observers:** Trainers can assign a previously created task list to a learner and associate a ‘task observer’, that will observe the learner perform the task to see if they are able to demonstrate what they learned while taking the course.


2. Search for and add an Item.
   1. Add an Item

3. Search for and add an Observer.
   2. Add Observers

4. Search for and Add the User.
   3. Add Users

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

5. Select Review.

6. Select 'Send Observation Request'.
Content: Printed Exam Templates

Introduction
Printed Exams, located in tools menu on the Content page, allows trainers to create printed exam templates that learners can take outside of the learning management system. Printed exam templates are created in HTML format.

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 Create Printed Exam Templates

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

   Edit Printed Exam Templates

<table>
<thead>
<tr>
<th>Description</th>
<th>Template Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default template for printed exam</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
   <tr><td><textarea></textarea></td><td>Table width="50%"</td></tr>
   <tr><td><textarea></textarea></td><td>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</td></tr>
   <tr><td><textarea></textarea></td><td>Aliquam erat volutpat. Quisque euismod augue non, vehicula facilisis massa. Integer euismod quam eu massa bibendum, eu ultrices magna ullamcorper.</td></tr>
   <tr><td><textarea></textarea></td><td>Donec euismod, tellus ut pulvinar rutrum, velit purus rutrum velit, euismod euismod metus nisl.</td></tr>
   
   2. Select Apply Changes.

   Apply Changes

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

Introduction
Trainers can add documents (books, videos, standard operating procedures, and so on) to support instructional design and delivery. Documents can be included with 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

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:  
- Starts With [Dropdown]

Title:  
- Starts With [Dropdown]

Add/Remove Criteria

Search  Save As  Reset

Process Overview
Follow the steps below to add learning documents.

Steps

1. After following the above path, select the Documents tab.

2. Select Add New link.

3. 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, the ID should start with the agency acronym and should not include any 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 populate in the search results.
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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 may 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.

**Documents**

Add New Document

* Required Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document ID</strong></td>
<td>LMS_LMS_UserGuide</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>Lms Admin User Guide</td>
</tr>
<tr>
<td><strong>Active</strong></td>
<td>✔️ Active</td>
</tr>
<tr>
<td><strong>Document Type</strong></td>
<td>Reference Manual (MAN)</td>
</tr>
<tr>
<td><strong>Domain</strong></td>
<td>DMS</td>
</tr>
</tbody>
</table>

Once the fields are completed, select ‘Add’.

4. Associate the document with a scheduled-offering, curricula, or task.

5. To associate to an item:

   a. Select the Learning Button.

   ![Learning Button]

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

   ![Course Management]

   c. Once in the item, select 'More' in the Related Menu on the bottom left.

   ![Related Menu]

   d. Select Documents tab.
e. Search and select the document that you created. Then select ‘Add’.

When a document is added to an item, learners will be presented with this view when they register for a course:
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 by an agency administrator.

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 Scheduled Offering

1. Summary Information
   - Type: Item Schedule Block
   - Item ID:
   - Domain: PUBLIC

2. Schedule Information
   - Start Date:
   - Start Time:
   - Time Zone:

3. Resources
   - Facility:
   - Primary Location:
   - Primary Instructor:
   - Equipment:

Steps:
1. After following the above path, select the Scheduled Offerings tab.
2. Select ‘Add New’
3. Complete the fields as outlined below:

a. Summary Information Fields
   - Type: Item Schedule Block
   - Item ID: DMS-ALL-10
   - Domain: DMS
   - Description: Communication Skills Scheduled Offering
   - Catalogs: Publish in all associated catalogs

Process Overview
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

* Start Date: 10/24/2019
(MM/DD/YYYY)

* Start Time: 08:00 AM
(hh:mm AM/PM)

* Time Zone: Eastern Standard Time (Am)

Start Date: Scheduled offering start date.

Start Time: Scheduled offering start time. Enter the start time in HH:MM AM or PM 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 (All fields are optional)

3. Resources

Facility: Tallahassee (OMS_Tallahassee)

Primary Location: Conference Room 101 (OMS_101)

Primary Instructor: 01098208

Equipment: Notify Instructor

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.

4. Select Save.

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

   a. **Scheduled Offerings Extended Summary Fields**

<table>
<thead>
<tr>
<th>Extended Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
</tr>
<tr>
<td>Contact</td>
</tr>
</tbody>
</table>

- **Active**: Displays Yes or No. Represents if the scheduled offering is still active.
- **Source**: Optional. Enter or edit the contact’s name for this scheduled offering.
- **Enable Cancellation Reason**: Defaults to No. Allows learners to select a cancellation reason in the event a learner cancels.
- **Email**: Enter or edit an email address that you would like learner’s to utilize should they have any questions about the scheduled offering.

   b. **Registration Fields**

<table>
<thead>
<tr>
<th>Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email confirmation to the Instructor</td>
</tr>
<tr>
<td>Email confirmation to the Users</td>
</tr>
<tr>
<td>Enable Users to Waitlist</td>
</tr>
<tr>
<td>Minimum Registration</td>
</tr>
<tr>
<td>Registration Cut-off Date</td>
</tr>
<tr>
<td>Registration Cut-off Time</td>
</tr>
<tr>
<td>Registration Cut-off Time Zone</td>
</tr>
<tr>
<td>Published Price</td>
</tr>
<tr>
<td>Self Registration</td>
</tr>
<tr>
<td>Supervisor Registration</td>
</tr>
<tr>
<td>Withdraw Cut-off Date</td>
</tr>
<tr>
<td>Withdraw Cut-off Time</td>
</tr>
<tr>
<td>Withdraw Cut-off Time Zone</td>
</tr>
</tbody>
</table>

- **Email Confirmation to the Instructor**: Defaults to Yes. Sends an email to the instructor when a learner registers for the offering.
- **Email Confirmation to the Supervisor**: Defaults to Yes. Sends an email to the supervisor when a learner registers for the offering.
- **Email Confirmation to the Users**: Defaults to Yes. Sends an email to the learner when they register for the offering.
- **Email Confirmation to the Contacts**: In the event you add additional contacts to the offering, those contacts will be notified as well.
- **Max Registration**: Limits the number of learners that can sign-up for training.
- **Min Registration**: The minimum number of learners for the course to be conducted. Does not automatically cancel the course.
- **Registration Cut-off Date**: Recommended. Last day that learners can register for the scheduled offering.
- **Registration Cut-off Time**: Recommended. End time for the cut-off date, that learners can register for the offering.
- **Registration Cut-off Time Zone**: Recommended. Time zone for the registration cut-off date.
- **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.

6. Select Save.

7. **Create Segments for the Scheduled Offering**: Creating segments for the offering is an optional feature that allows you to break the classroom training into segments (blocks of time) that 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](image)

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.

![Edit Segment](image)

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

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

10. **Registration**: To add a learner or group of learners to the training prior to publishing in the Catalog, select Registration in the Related Menu.

a. Select the Registration tab within the Related Menu.

![Registration](image)

b. Select the green plus icon to add learners.

c. You can enroll learners in the scheduled offering by entering each learners User ID (their People First Login ID) or by selecting Add One or More From List to locate and select learners 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.

![Add One or More From List](image)

11. **Catalogs**: If the scheduled offering is to be published to a catalog, then select Catalogs in the Related menu and add the respective catalog. Removal of previously added catalogs that the scheduled offering is published to can be performed in the section too.
12. **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.

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

- **Cancel the Scheduled Offering**: Only presented when selecting Scheduled or 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 when selecting Scheduled or Online and Scheduled (blended) course types. Allows you to record the learning as completed for the class attendees.

- **Initiate Evaluations**: Only presented when selecting Scheduled or 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 when selecting Scheduled or 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 when selecting Scheduled or Online and Scheduled (blended) course types. Allows notifications to be sent to the instructor based on learning activities.

14. **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 Skills</td>
<td>5/24/2019</td>
</tr>
<tr>
<td></td>
<td>(Rev 1 - 5/21/2019 12:44 PM America/Chicago)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   e. Search for the Users who you wish to record completion for. If a scheduled offering, you can autofill from the roster.

   Search & Add Users

   User ID:  
   List of Selected Users

<table>
<thead>
<tr>
<th>User ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>(00123456)</td>
<td>Lech, Briana G</td>
</tr>
</tbody>
</table>

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

   g. Edit the details, based on each attendee. Apply the changes for each learner.

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

   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
Adding Assessments

Introduction

Assessments allow trainers to create and add quizzes or exams to test learners 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. After following the above path, select the Assessments tab.

Assessments

2. Select Add New link.

Add New

3. 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 trainers 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. These features can be controlled at the quiz level.

4. 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.

   ![Search interface](Image)

   - Item Types: Starts With
   - Item ID: Starts With
   - Revision Date: Starts With
   - 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 selection](Image)

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

   (America/Chicago)

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]


e. Search for and add the assessment to upload. Apply the settings as appropriate for this item.

![Add Assessment]

f. Once the assessment has been uploaded, the content will need to be launched.

![Modify Settings]
g. Modify the settings and select the OK button.

- Required Field(s)
  - [ ] Content is available for launch (available for users)
  - [ ] Record learning event when all content is complete
  - [ ] Content available only during specified segments of a scheduled offering.

- Completion Status: COURSE-C (Completed) - Full Credit
- Failure Status: COURSE-NS (No Show) - Net Full Credit
- Failure Action:
  - [ ] Skip content structure page on launch
  - [ ] Available for Offline Player download

- Days from Launch to Expiration: [DATE]

- Browser, AICC and SCORM
  - [ ] Allow users to review content from Completed Works
  - AICC Max. Norm. 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. Trainers 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. After following the above path, select the Classes tab.

2. Select Add New.

3. 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: Maximum size of the class.
   f. Start Date: Beginning date of the class.
   g. End Date: End date of the class.
4. Select Add.

5. 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.

c. Select Apply Changes to add the scheduled offerings to the class.

d. After the scheduled offering has concluded, trainers can select the ‘Record-Learning-Multiple’ link as highlighted as shown above, and record learner’s attendance and their completion status.

6. Use the Registration Rules tab to configure the registration, withdrawal, and notification settings for the classes in a graduation group.
Configuring Registration Rules

a. Select the Registration Rules tab on the classes page.

b. Configure the settings within the page as desired.

**Registration Status**: Defaults to Active enrollment. The remaining registration status is Waitlisted. Trainers have the option to reserves slots in the offering.

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

**Withdraw Rules**: Removes the associated items with the class from the learners learning plan.

**Notification Rules**: Sends email confirmations to the selected learners.

---

```
<table>
<thead>
<tr>
<th>Registration Status:</th>
<th>Active Enrollment (Enrolled)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slots:</td>
<td>Use a User’s organization’s reserved slot when possible</td>
</tr>
<tr>
<td></td>
<td>Use a Group slot when possible</td>
</tr>
<tr>
<td>Scheduled Offering chargeback setting:</td>
<td>No Charge</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Withdraw Rules:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Plan:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Notification Rules:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email confirmations to:</td>
</tr>
</tbody>
</table>
```

7. After configuring the above registration rules, the next steps would be to add learners to the class.

**Adding Users to a Class**

a. Select the Users tab to add learners to the class.
b. Search for the learners 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: [Field]  Add

   Update the Users for the Class

   Apply Changes  Reset

<table>
<thead>
<tr>
<th>User ID</th>
<th>Name</th>
<th>Status</th>
<th>Remove</th>
<th>Move to Another Class</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lech, Bill</td>
<td>G</td>
<td>In Progress</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   c. Select the Apply Changes button.

8. Trainer's can run reports directly from the classes tab that report on the learner's progress within the class.

   a. Select the Summary tab.

   b. Select the report you wish to run: Class Location Report or Class Progress Report.

   Edit the Class

   * = Required Fields

   Description: [Field]  Advanced Leadership Course

   Domain: [Field]  OMS

   Curriculum: [Field]  

   Max Size: [Field]  19

   Start Date: [Field]  2/15/2020

   End Date: [Field]  5/26/2020

   Apply Changes  Reset  Delete

   Class Location Report  Class Progress Report

   c. After selecting the report, you can edit the fields as desired and change the formatting of the report.
d. Select ‘Run Report’
Learning Tools Menu

Introduction
The learning tools menu enables trainers 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. After following the above path, select the Tools tab.

2. 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. **Note:** Once a class is closed, no further actions or edits can be applied to the offering, because the finality of this action we recommend not utilizing this feature.

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: Trainers 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 will use 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. and select Next.

6. You will have the opportunity to review the registration and add any comments if applicable. Then select Next.

7. Select ‘Finish’ to record the registration.

**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) for the items within the curriculum.

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

3. Select Next.

4. Select the target population of learners (learners, instructors, supervisors) you would like to notify.

5. Select ‘Finish’.
Learning Management System: Trainer User Guide

Reports Overview

Introduction

Trainers have the option to run reports and gather data from the LMS. Reports cannot be modified, and those with a “trainer” role will not have access to the full reports list.

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

Reports Overview

1. Search for the report you wish to run or scroll through the list of reports.

2. Once you have entered the report to search for, select the “Submit”.

3. Select the report that you wish to run.
4. Some reports provide you with the option to filter and narrow your report criteria.

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

6. The report will generate in a new window.

7. 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