SPD ELM TRAINING
2013

COPYRIGHT & TRADEMARKS

Table of Contents

ELM TRAINING

Course Catalog

Catalog Components

The Course Catalog consists of three main components:
1. Categories (Owner/Host/Specialty Area)
2. Items (Courses)
3. Activities (Sessions)

Categories enable the administrator to classify catalog items (courses) so that learners and managers can easily find needed learning in the catalog. When using the **advanced search** feature, learners can search the catalog by category. When using the **browse feature**, learning is also presented by category.

Items represent a specific topic of study for which learning activities are offered. In general terms, the item represents the course. All learning activities associated with a given catalog item share the same prerequisites, objectives, equivalencies, and other features.

Activities are instances or offerings of a catalog items. If you think of a catalog item as a course, then an activity would be a class or session. Activities are comprised of learning components. Learning components represent how the instructional content of the activity will be delivered to the learners. For example, learning components can be instructor-led and scheduled, or they can be web-based (computer-based) and self-paced. Activities contain at least one learning component, but they could contain as many as needed to reach the learning objectives of the class.

Naming Conventions

Naming Conventions used for system components become important in the way that information is presented within the State of Indiana ELM system. Naming conventions designate a uniform format to be used when creating system component titles to facilitate easy location of desired learning. ELM system components incorporating naming conventions include: categories, items (courses), and activities (sessions).

It is recommended the following naming conventions are used for each system component:
1. The **course catalog category** will be the name of the State agency owning or hosting the training (such as State Personnel Department, Indiana Office of Technology, Department of Revenue, etc.).

2. **Items** (courses) should begin with the State agency acronym and followed by additional naming convention criteria established by the agency. For example, if the State Personnel Department (SPD) wishes to create a new item (course) within the system and courses are tracked by a numbering system established and maintained by SPD; their item naming conventions may look like: SPD_00051.

3. **Activities** (sessions) should begin with the State agency acronym and followed by additional naming convention criteria established by the agency. For example, if the SPD wishes to create an activity (session) for the item (courses) listed above, in addition to the numbering system established and maintained for the items, an extension may be added to identify the activity. An activity naming convention may look like: SPD_00051_120109. The last segment of the activity may identify the date the activity will be offered for the item.

Enrolling Learners (4 Concepts)

CONCEPT 1: Enterprise Learning Management supports several methods of enrollment and registration:

• ***Individual learners can self-enroll and self-register.***
Learners can browse or search the catalog for activities and enroll in the activities directly. Learners can also add activities to their learning plans and enroll in the planned activities later. If there's no enrollment cutoff date for an activity, learners can enroll in the activity at any time. However, planned activities are not visible in the employee self-service pages after the activity end date is met.

• ***Managers can enroll and register direct reports.***
Managers can browse or search the catalog for activities in which to enroll any team member within the organizational hierarchy. Or, they can add activities to employees' learning plans and enroll the employees in the planned activities later. If there's no enrollment cutoff date for an activity, managers can enroll learners in the activity at any time. However, the activity is not visible in the manager self-service pages after the activity end date is met.

• ***Administrators can enroll and register individual learners and groups of learners.***
Administrators can enroll individual learners and small groups of learners through group enrollment and large groups of learners through mass enrollment. Administrators can enroll learners in activities regardless of enrollment cutoff dates.

CONCEPT 2: Enrollment features:

• ***Approvals***
The system might require approval from a manager or administrator before it can confirm enrollment. Administrators are the only individuals who can override approvals. Depending on organizational rules, administrator approval can be required for some forms of payment.

• ***Prerequisites***
Learning activities might have prerequisites that learners must complete before they can enroll. Administrators are the only individuals who can override prerequisites.

• ***Waitlists***
Activities can have a capacity limit. When the capacity limit is reached and the waitlist feature is enabled, the system can automatically create a waitlist. If an enrolled learner drops enrollment in the activity, the system enrolls the first person on the waitlist automatically, as long as the activity start date has not passed. **The system does not enroll waitlisted learners automatically after the activity start date.** After the activity start date, the administrator must manually enroll the learner by using the *Maintain Activity Roster* component or move the learner to a new activity through the *Activity Roster* component. Administrators can also change a learner's position in a waitlist and increase the waitlist capacity.

• ***Reserved seating***
Administrators can reserve seats for learners in activities when they anticipate participation of several learners but cannot identify them. Administrators are the only individuals who can reserve seats and fill the reserved seats.

• ***Payment methods***
Learners, managers, and administrators can select different payment methods during enrollment depending on the system setup and the person that makes the enrollment or registration request.

• ***Discounts***
Learners can receive discounts on all activity and drop currency fees if there is a discount set up for the department or customer organization to which the learner belongs. Discounts do not apply to activity or drop fees paid for using training units.

• ***Automated notifications***
The State of Indiana ELM platform has enabled workflow so enrollment events generate an automated email notification to learners, managers, administrators, or owners. For example, learners can receive email when administrators approve their enrollment in activities or is pending approval.

CONCEPT 3: Rules for dropping enrollments:

Learners, managers, and administrators can drop a learner's enrollment in an activity. However, learners cannot drop activities **if they were not the requesters during enrollment or registration**. **A learner can only drop activities that he or she self-enrolls in.** When a learner drops an activity, the system removes it from the learner's schedule.

Activities can have last drop dates. The system charges a drop fee, if one exists, only if a learner drops after the last drop date. Last drop dates can be set up for activities as either a specific number of days before or after the activity start date, on a specific date, or on the activity start date. If a last drop date is not specified, learners can drop the activity up until the activity start date. Administrators can always drop a learner's enrollment in an activity, regardless of an activity's last drop date or start date.

For example, say the drop cutoff date is January 12 and the activity starts on January 15. If a learner drops the activity on January 12, the system does not charge the learner the drop fee. If a learner drops the activity from January 13 to January 14, the system charges the learner the drop fee. Only an administrator can drop the learner on or after January 15.

Administrators can modify the drop fees for learners on the activity and program roster pages.

CONCEPT 4: Enrollment Statuses:

Each enrollment goes through a series of enrollment statuses—such as planned, pending approval, waitlisted, enrolled, in progress, and completed—as the enrollment progresses. These statuses appear on several of the employee and manager self-service pages, and on the roster and grading pages that are available to administrators and instructors.

The statuses that apply to a particular enrollment record the conditions and prompt a status change can vary depending on the enrollment options enabled for the activity and what type of learning components are in the activity.

Enrollment statuses work in conjunction with completion statuses for learning components; **a change to the completion status of a learning component can prompt a change in the enrollment status of an activity**. Attendance and passing statuses affect the completion statuses of learning components. Together, these statuses help track a learner's progress through an activity.

Administering Course Rosters

Administrators can use the ***Administer Activity Roster*** component to search for and access any activity roster within their learning environments. Using the rosters, they can approve enrollment requests, manage waitlists, drop learners, and update payment details on a learner's enrollment record. Tasks that are performed by changing a learner's enrollment status, such as dropping a learner or approving enrollment depend on the learner's current enrollment status and the permission lists that are assigned to the administrator. Administrators can update the registration status of an individual learner or use a group action to update multiple learners simultaneously. They can also use the group action feature to send ad hoc email notifications to learners.

The ***Administer Activity Roster*** component can also be used to view and update learners' grades, attendance, and scores. These tasks are discussed in the *Instructor Tasks* section of this guide.

Activity Approvals

PeopleSoft provides different components for approving learning requests based on the approver's role and the need for approval information:

• ***Maintain Approvals***

This is a manager component. It enables managers to view enrollment requests submitted by their direct reports, and to submit, approve, deny, or push back the requests. Managers can also use this component to insert additional approvers or reviewers at any point in the approval path.

This component can also be accessed by learning administrators acting as special approvers. And if a learner is paying by training unit or purchase order, the owner of the training units or purchase order can access this component to deny or approve the learning request.

• ***Team Members***
This is a self-service component for managers. It enables managers to view enrollment requests submitted by their own team members or the direct reports of their immediate team members, and to approve, deny, or push back learning requests.

• ***Administer Activity Rosters***
This is an administrator component. It enables administrators to view activity enrollment requests and to approve or deny the requests.

Adding Supplemental Learning (External Training)

The supplemental learning feature is used to record learning completed beyond the cataloged activities (external learning) into a learner's training history so they may receive credit for the training. Supplemental learning would include such items as seminar or conference attendance, academic courses, equivalent work experience, or some form of on-the-job training.

Learner ID Numbers

The **Learner ID** number is a number sequentially assigned by the **Enterprise Learning Management (ELM)** system. The Learner ID number should be unique to each learner and is established by the creation of a **Learner Profile** within the system.

The Learner ID number is completely separate from the **PeopleSoft ID number** (also called the **User ID**) assigned in the **PeopleSoft HR** system.

The PeopleSoft ID number consists of 1000XXXXXX. The User ID is the first initial of a person's first name and the last six digits of the PeopleSoft ID number. For example: an employee named Lucy Roberts will have a PeopleSoft HR PeopleSoft ID number of 10000058556; but her PeopleSoft HR User ID would be L058556.

Every night, the PeopleSoft HR records integrate with the PeopleSoft ELM records. The PeopleSoft ELM system searches for new PeopleSoft HR User IDs to establish the PeopleSoft ELM Learner Profile. Once a new ELM Learner Profile is created, the system sequentially assigns the next Learner ID available to the learner. Learner ID's are needed to establish learner groups within the system for learner activity assignments and enrollments.

The PeopleSoft HR system stores job data record information while the PeopleSoft ELM stores training record information. The PeopleSoft User ID links the two systems together.

An overview of the process is:
1. A PeopleSoft HR Job Data record is created in the system and a **PeopleSoft ID** number is assigned (10000XXXXXX).
2. A **User ID** is created by a person's first initial and last six digits of the PeopleSoft ID number (LXXXXXX).
3. The PeopleSoft HR system **integrates job data records** with the PeopleSoft ELM system.
4. New **learner profiles** are created in the PeopleSoft ELM system using the User ID number.
5. The PeopleSoft ELM system sequentially assigns a **Learner ID number** to the learner profile to track training enrollments and completions in the ELM.

Senior Training Administrator Tasks

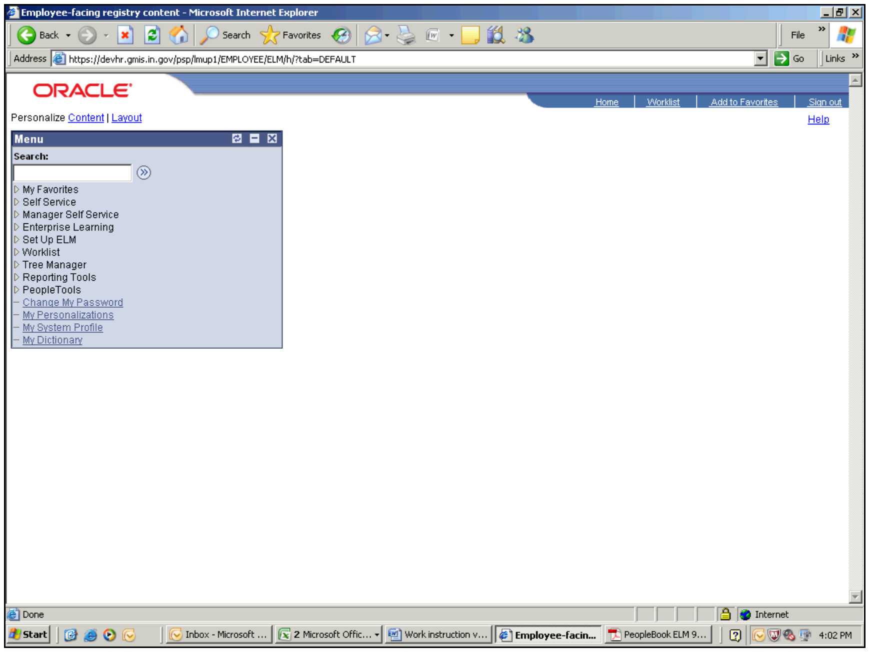
Creating Courses

How to Create/Update Item

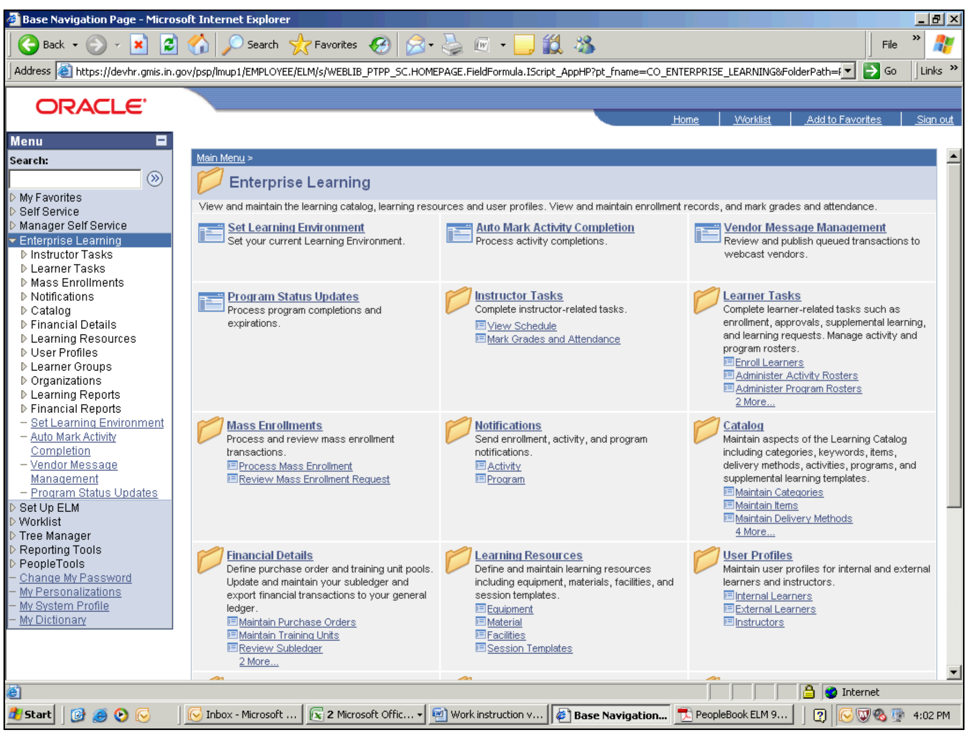
Items represent a specific topic of study for which learning activities are offered. In general terms, the item represents the course. All learning activities associated with a given catalog item share the same prerequisites, objectives, equivalencies, and other features.

It is recommended the following naming convention is used for item creation:
Items (courses) should begin with the State agency acronym and followed by additional naming convention criteria established by the agency. For example, if the State Personnel Department (SPD) wishes to create a new item (course) within the system and courses are tracked by a numbering system established and maintained by SPD; their item naming conventions may look like: SPD_00051.

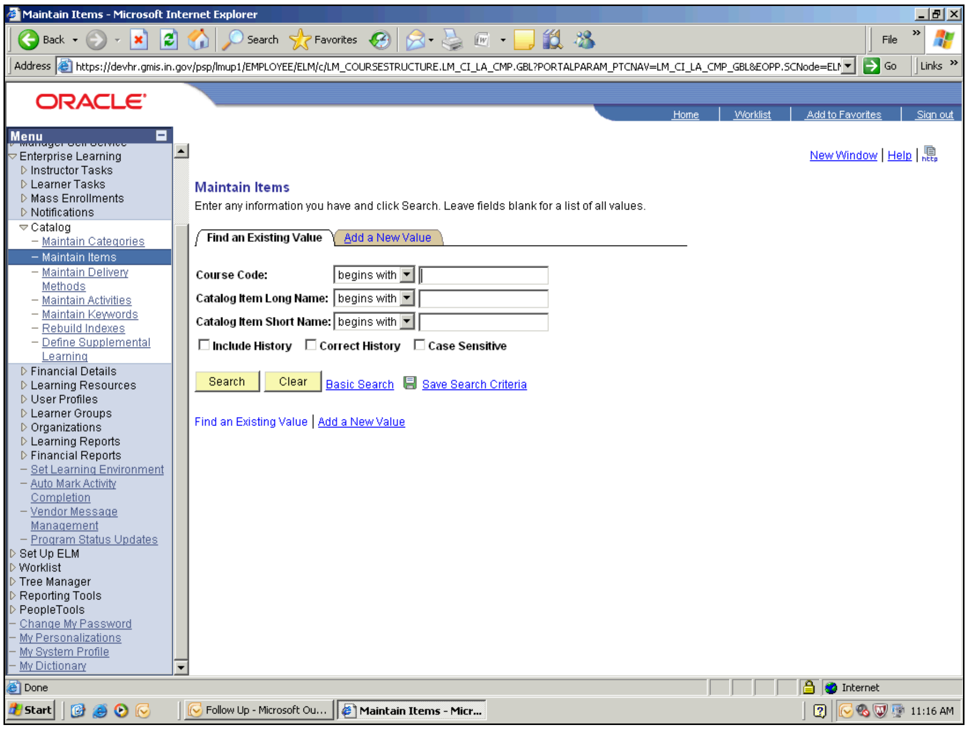
This lesson will teach administrators how to create and/or update catalog items.



Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



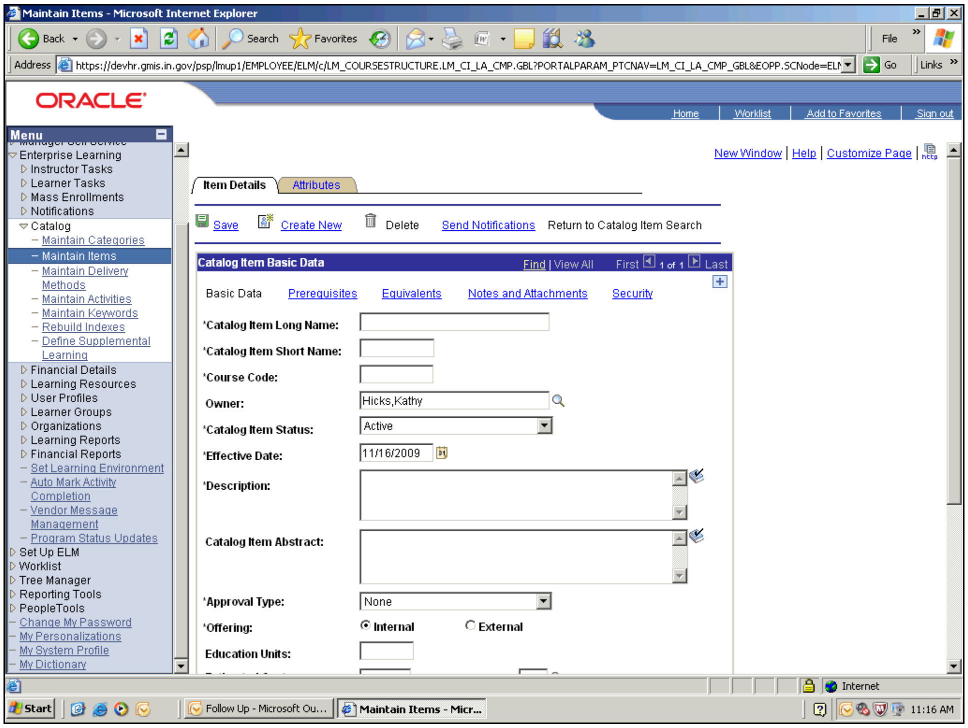
Step	Action
2.	Click the **Catalog** link. Catalog
3.	Click the **Maintain Items** link. Maintain Items



Step	Action
4.	Enter **search criteria** to update an existing item or click the **Add a New Value** tab to create a new item. Add a New Value

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

<u>To further define search criteria:</u>
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.



Step	Action
5.	Click in the **Catalog Item Long Name** field.
6.	Enter the name of the item (course title) into the **Category Long Name** field.
7.	Click in the **Catalog Item Short Name** field.
8.	Enter the short name abbreviation into the **Catalog Item Short Name** field.
9.	Click in the **Course Code** field.
10.	Enter the course code information into the **Course Code** field. (It is recommended that the course code begins with the state agency acronym.)
11.	Confirm the **Owner** field is correct or click in the **Owner Magnifying Glass** button to search for a different item owner. Hicks,Kathy
12.	Click the **Catalog Item Status** drop-down menu button.

Step	Action
13.	Select the correct **Catalog Item Status** from the list of values. - Select **Active** when the item is ready for use. - Select **Inactive** for items no longer in use. - Select **Pending** while developing a new item. Active
14.	Confirm the date in the **Effective Date** field is correct. 11/16/2009
15.	Enter the item (course) description into the **Description** field.

This field is limited in the number of characters that may be used. For detailed item descriptions, use the **Catalog Item Abstract** field.

Step	Action
16.	Click in the **Catalog Item Abstract** field.
17.	Enter a more detailed item (course) description into the **Catalog Item Abstract** field.
18.	Click the **Approval Type** drop-down menu button.
19.	Select the correct **Approval Type** from the list of values. - Select **Both-Specia**l when both the learner's manager/supervisor **AND** the catalog item administrator enrollment approval is required. - Select **None** when no enrollment approval is required and the learner may self-enroll. - Select **Standard** when the learner's manager/supervisor **ONLY** is required to approve enrollment. Both-Special
20.	Confirm the **Offering** radio button option **Internal** is selected. Internal

All courses created, owned, and hosted and/or delivered by the State of Indiana will be **Internal** courses.

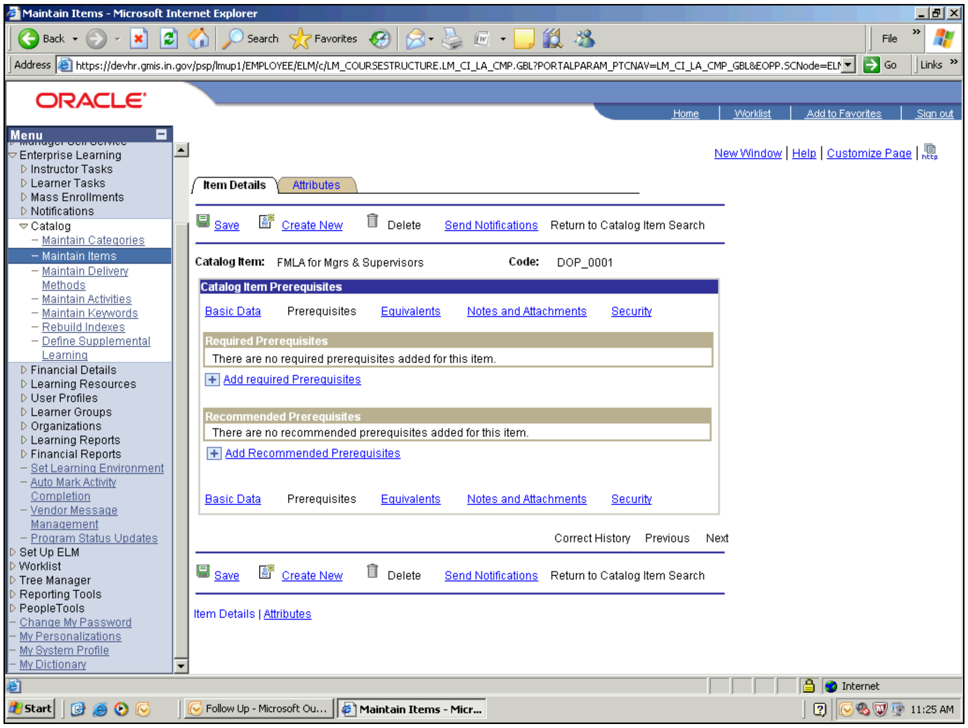
Step	Action
21.	Enter the number of education units earned for the course in the **Education Units** field, if applicable.

> This field is for documentation purposes only.

Step	Action
22.	Enter estimated item costs into the **Estimated Cost** field, if desired.

> The cost value can be used to calculate forecasted training costs when training plan budgets are produced. The **Estimated Cost** field represents the estimated cost, per learner, of delivering the activity and can be overridden at the delivery method level.

Step	Action
23.	If an estimated cost was entered into the **Estimated Cost** field, confirm the **Currency Code** field is correct.
24.	Check the **Enable Learning Request** checkbox to allow learners to choose the catalog item when submitting a learning request. ☑ Enable Learning Request
25.	Click in the **Learning Request Threshold** field. 10
26.	Enter a learning request threshold number into the **Learning Request Threshold** field to specify how many item requests must be made before the administrator is notified. **The Enable Learning Request checkbox must be checked for administrator notification to occur.**
27.	Click the **Prerequisites** link. Prerequisites



Step	Action
28.	Click the **Add required Prerequisites** link. Add required Prerequisites
29.	Click the **Type** list. Catalog Iten

Prerequisite catalog items should be selected and entered. Administrators can override prerequisites for learners. Managers cannot override prerequisites for a learner directly but may use the supplemental learning page to give learners waivers on catalog items.

Required Prerequisites are mandatory prior to the completion of another course item and will prevent the learner from enrolling in advanced activities until completed.

Recommended Prerequisites are not mandatory and will not prevent the learner from enrolling into an activity.

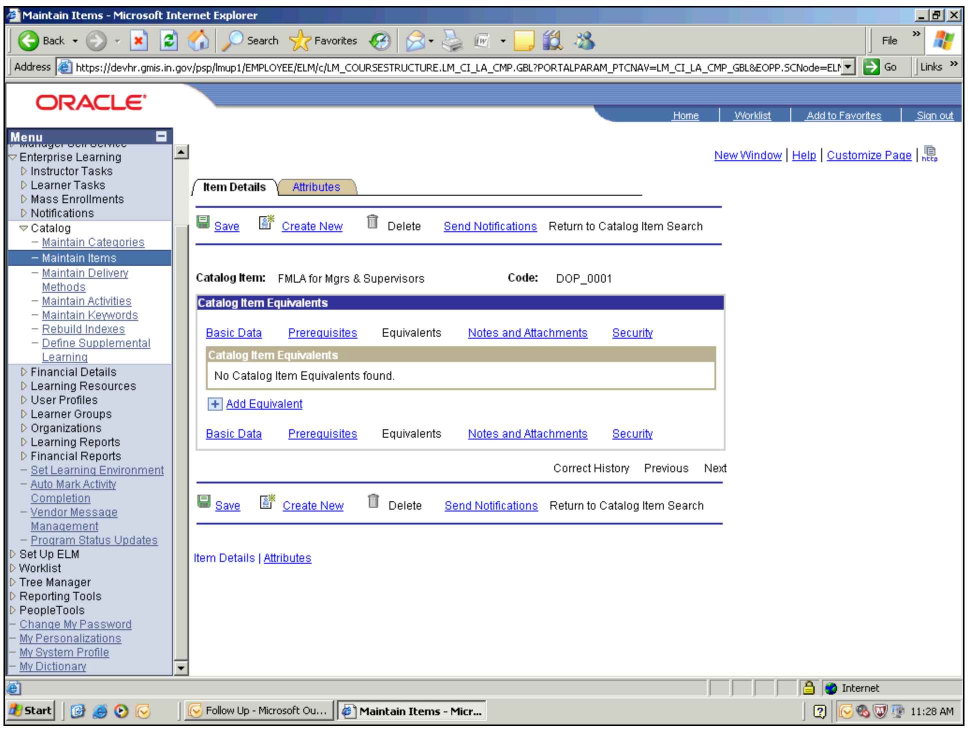
When entering prerequisites, the **Relationship** drop-down menu field list of values need to be set correctly. Values include:

- Select **End** if this is the last prerequisite.
- Select **And** if there are additional prerequisites.
- Select **Or** if a prerequisite can be met by completed the next

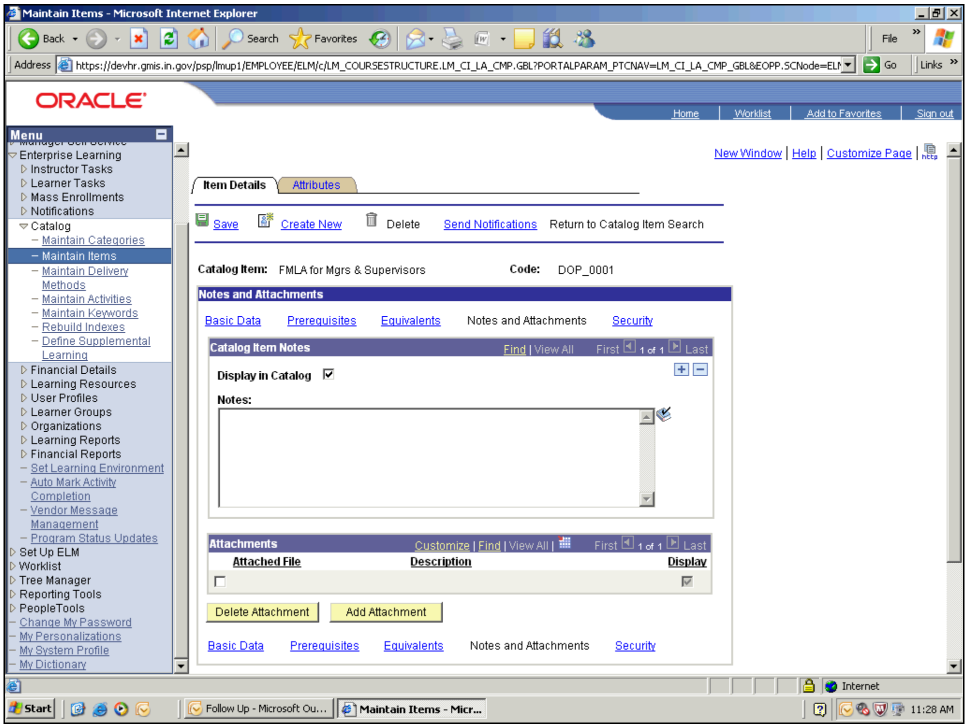
	prerequisite entered. **Important! The system ignores any prerequisites that are listed after *End*.**

Step	Action
30.	Click the **Equivalents** link. Equivalents

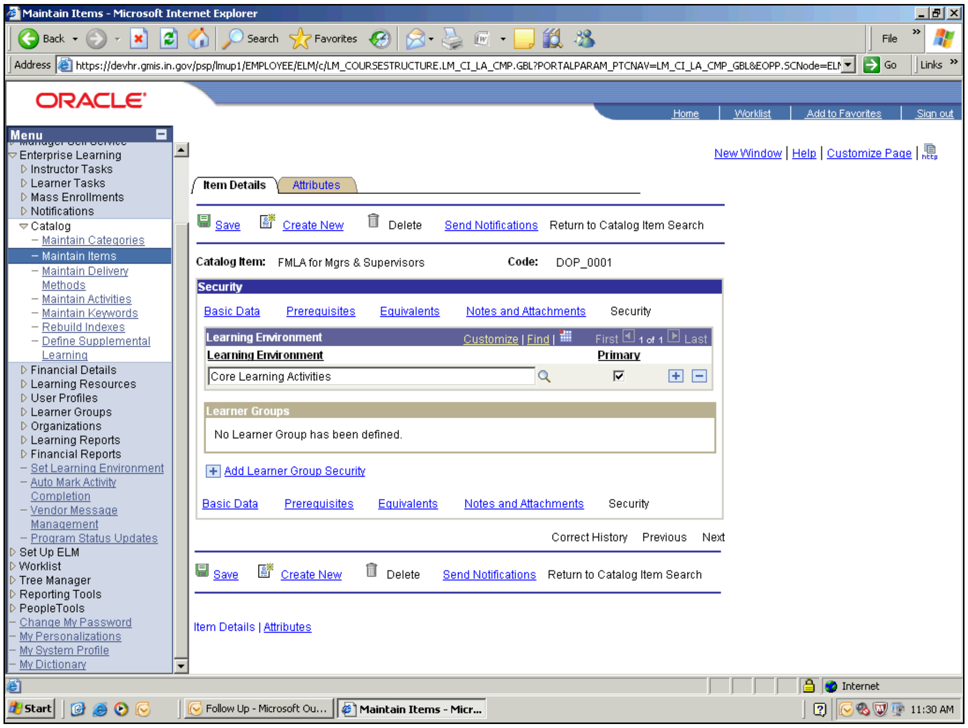
	If another catalog item is considered to be the equivalent of this one, select the equivalent item. The system does not perform any checks to determine if equivalent items have the same objectives.



Step	Action
31.	Click the **Notes and Attachments** link. Notes and Attachments

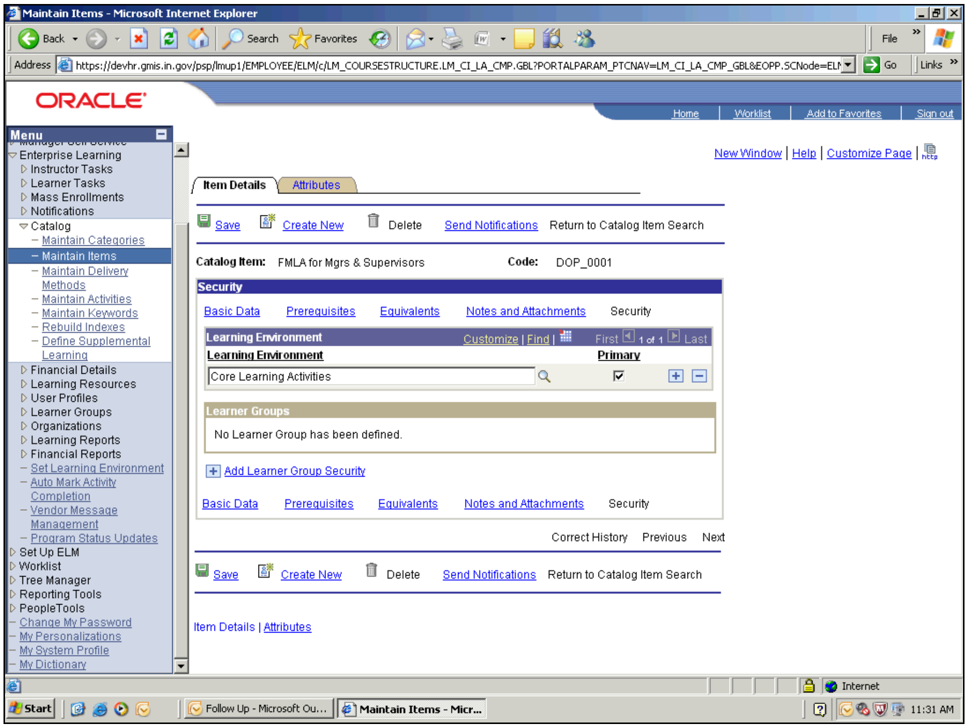


Step	Action
32.	Check the **Display in Catalog** checkbox for catalog item notes and/or attachments to appear in the catalog. 
33.	Click in the **Notes** field.
34.	Enter catalog item related notes into the **Notes** field.
35.	Click the **Security** link. 



Step	Action
36.	Confirm the correct **learning environment** is showing in the **Learning Environment** section. 

An item must be associated with at least one learning environment. The system displays the administrator's current learning environment as the default. If more than one learning environment exists and a learning environment is removed, the primary learning environment will automatically default to a remaining learning environment. The primary learning environment can be changed at any time.



Step	Action
37.	Click the **Add Learner Group Security** link. Add Learner Group Security
38.	Click the **Learner Group Magnifying Glass** button to search for learner groups.

Learner group security specifies which learner groups can access activities and programs within a category when browsing or searching the catalog.

If a learner group is not assigned, the related activities will not appear in the catalog.

Step	Action
39.	Enter **search criteria** for the learner group.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

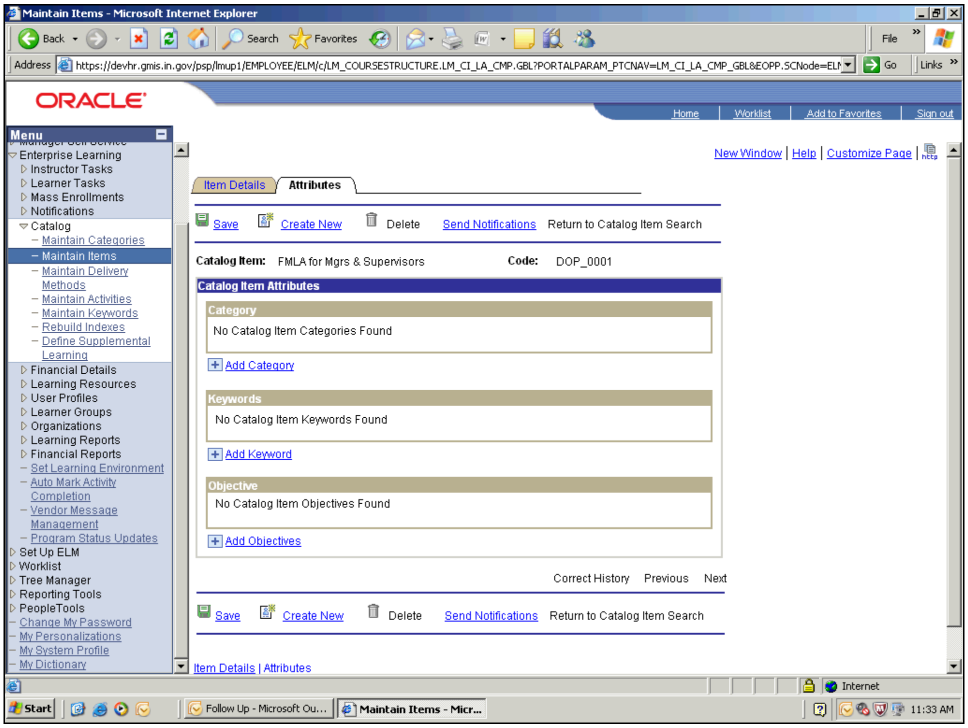
Step	Action
40.	Click the **Look Up** button. Look Up
41.	Select the correct learner group from the list of values. All Employees
42.	After all learner groups have been entered, click the **Done** button. Done

When entering learner group security **for multiple learner groups**, the **Relationship** drop-down menu field list of values need to be set correctly to specify how one learner group is related to others in the list when used to determine whether or not a person has access. Values include:

- Select **And** if a learner must be a member of both this learner group and the next in the list.
- Select **Or** if a learner must be in this learner group or the next in the list.
- Select **End** as a placeholder for the last learner group is the list.

Important! The system ignores any learner groups that are listed after *End*.

Step	Action
43.	Click the **Attributes** tab. Attributes



Step	Action
44.	Click the **Add Category** link. Add Category

The **Catalog Item Attributes** category specifies which category an item is to be listed in the learning catalog.

If a category is not assigned, the related items and activities will not appear in the catalog.

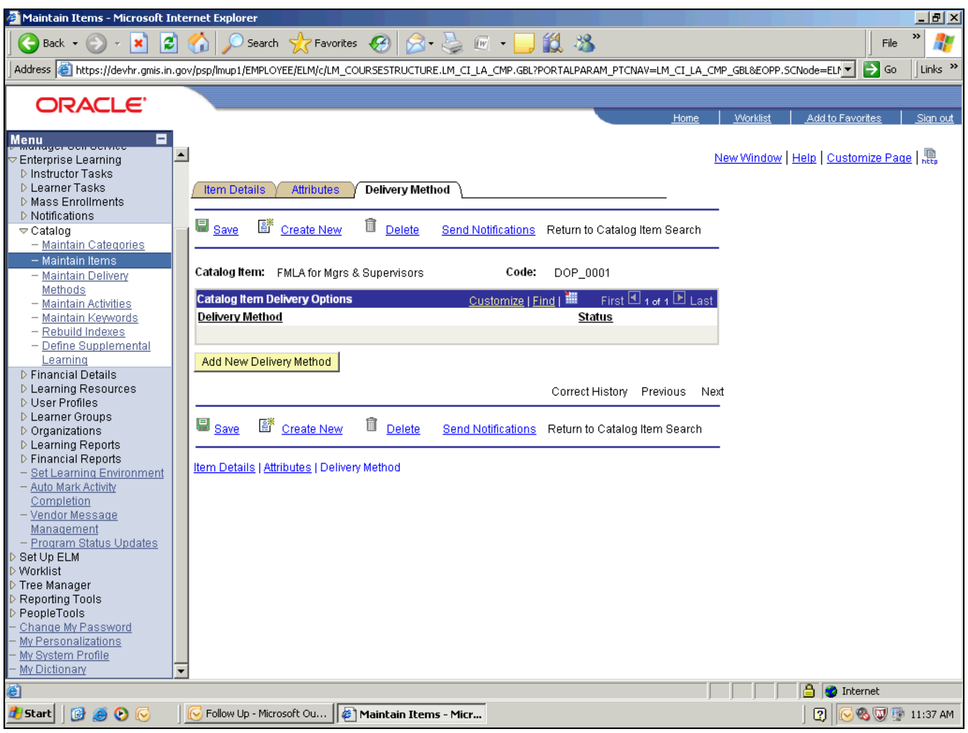
Step	Action
45.	Click in the **Display Order** field.
46.	Enter the display order number into the **Display Order** field.

Display order is the order the catalog item is listed when a learner browsing the catalog clicks this category. The system uses display order when a learner browses the catalog.

Assign a unique number to each catalog item in this category. Assigning the same number more than once will not prevent the item from appearing. If unique numbers are not assigned, items will list

either alphabetically and/or by item code number by default.

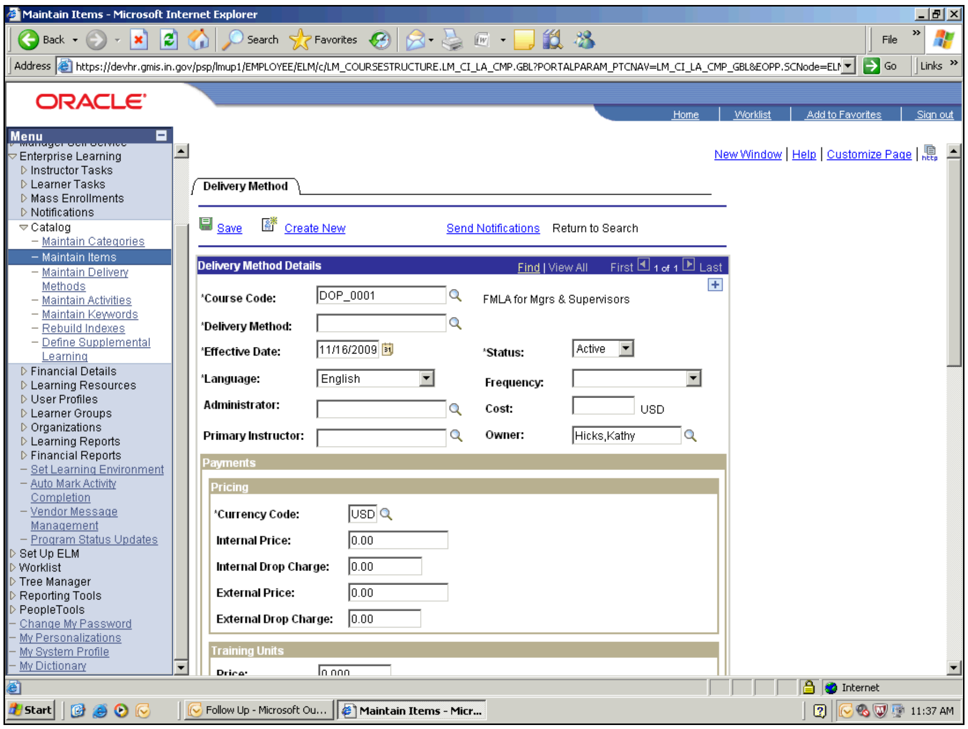
Step	Action
47.	Click the **Category Magnifying Glass** button to locate the category to which the catalog item belongs.
48.	Select the correct category from the list of values in the **Long Name** column. If necessary, enter **search criteria** to locate the category. Department of Personnel
49.	Click the **Add Keyword** link to add keywords, if desired. Add Keyword
50.	Click the **Save** link. Save
51.	Click the **Delivery Method** tab. Delivery Method



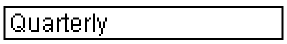
Step	Action
52.	Click the **Add New Delivery Method** button. Add New Delivery Method

Delivery methods define how course offerings are presented to learners (for example, through online learning, classroom instruction, seminars, books, etc.) within the organization. Learners can search the catalog for offerings by the delivery method that best suits their learning style.

Delivery methods are created for catalog items to identify the specific methods the item's activities are offered. The same catalog item may have multiple delivery methods. There are no restrictions on how many delivery methods can be defined or how they are named.

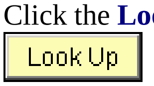


Step	Action
53.	Confirm the course code is correct in the **Course Code** field. DOP_0001
54.	Click the **Delivery Method Type Magnifying Glass** button.
55.	Select the correct delivery method from the list of values in the **Long Name** column. Instructor Led Training
56.	Confirm the effective date in the **Effective Date** field is correct. 11/16/2009
57.	Click the **Status** drop-down menu button. Active

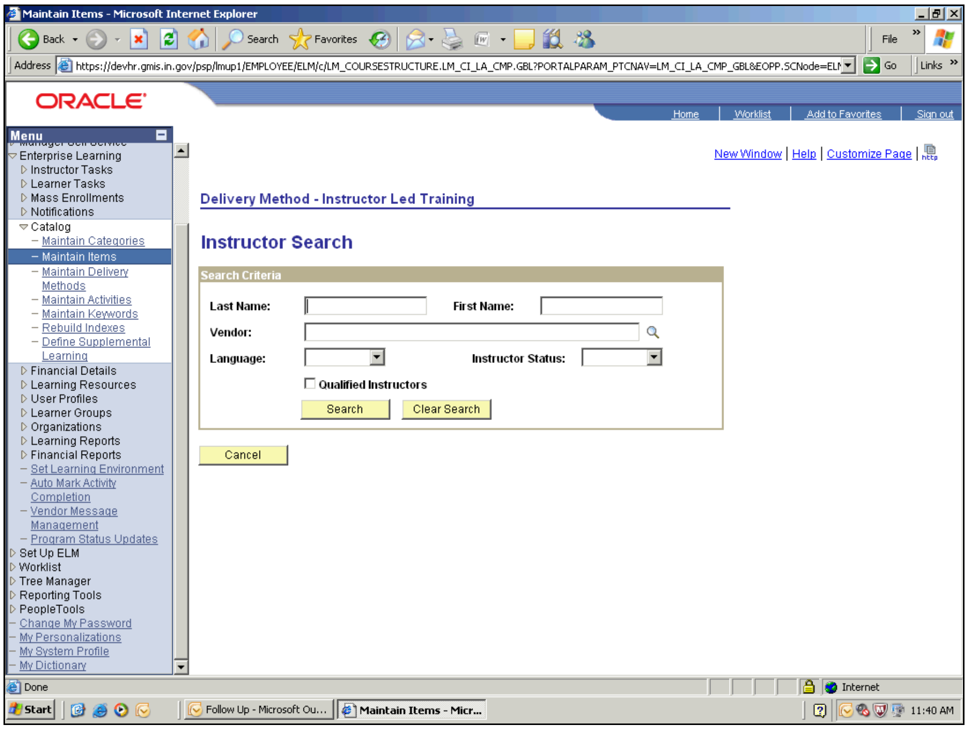
Step	Action
58.	Select **Active** when the delivery method is ready for use. Select **Inactive** for delivery methods being prepared for use or are no longer in use. 
59.	Click the **Frequency** drop-down menu button. 
60.	Select the frequency the activity is usually offered via the delivery method from the list of values. 
61.	Click the **Administrator Magnifying Glass** button to select an enrollment administrator. 
62.	Enter **search criteria** for the administrator.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

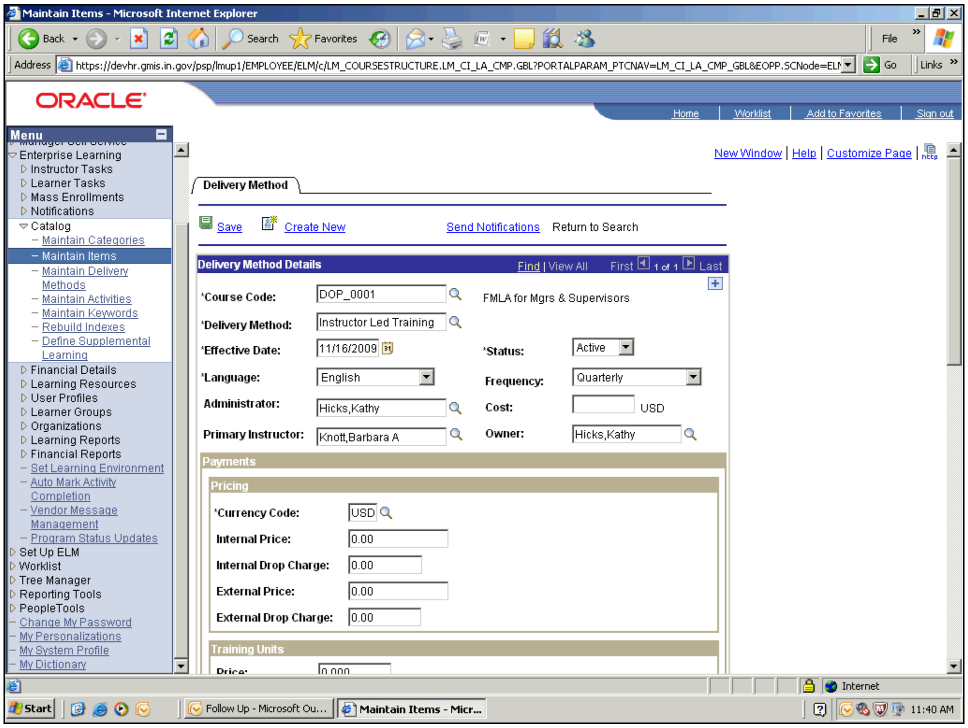
To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
63.	Click the **Look Up** button. 
64.	Select the correct administrator from the list of values. 
65.	Enter the cost of offering the activity in the **Cost** field, if applicable.

Step	Action
66.	Click the **Primary Instructor Magnifying Glass** button to locate a primary instructor for the delivery method, if applicable.

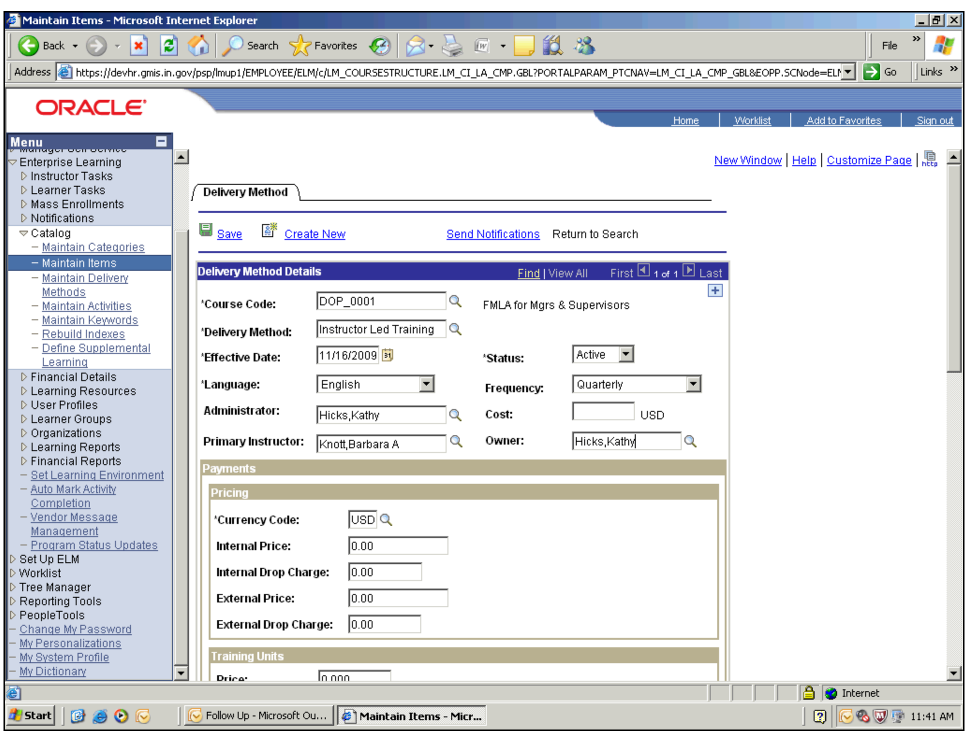


Step	Action
67.	Enter **search criteria** as needed and click the **Search** button. Search
68.	Select an instructor entry from the list of values in the **Name Display** column. Knott,Barbara A



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>69.</td><td>Confirm the owner of the item or click in the Owner Magnifying Glass button to change the owner.

</td></tr>
</table>



Step	Action
70.	Enter any payment information into the **Payments - Pricing** and **Training Units** sections. Pricing

The **Payments** section contains **pricing** and **training unit** information associated with the delivery method of an item. Selections made in either the **Pricing** section or the **Training Units** section can be overidden for adjustments at the activity level as needed.

***Pricing* fields include:**
Internal Price - The price to charge internal learners to enroll into item activities. Internal learners are learners who are tracked in PeopleSoft HR as employees, contingent (contract) workers, or persons of interest (board members, external instructors, etc.)
Internal Drop Charge - The amount to charge internal learners for dropping activities after the **drop period**.
External Price - Not used.
External Drop Charge - Not used.

***Training Units* fields include:**
Not used - training units only apply to external learners.

Step	Action
71.	Enter any estimated cost information into the **Estimated Cost** section.

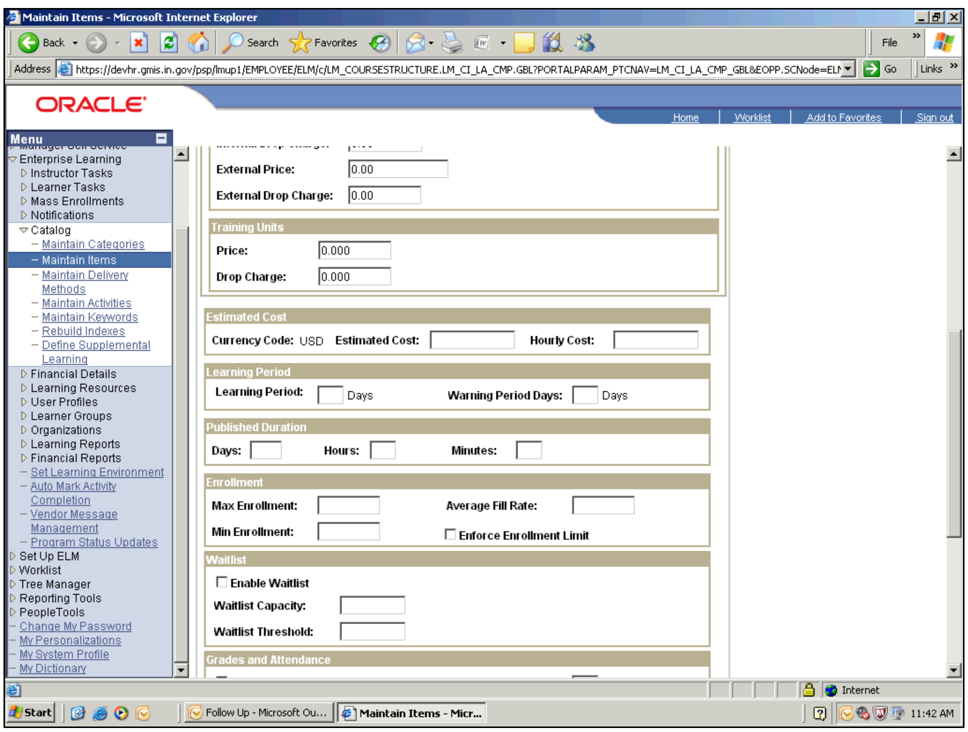
The entered **Estimated Cost** values can be used to calculate forecasted learning costs when training plan budgets are produced that includes activities with this delivery method.

***Estimated Cost* fields include:**
Estimated Cost - The default value appearing in the delivery method estimated cost is inherited from the catalog item. It represents the estimated cost, per learner, of delivering the activity. The system uses the cost entered here to determine the forecasted cost for the activity. This does not include any hourly costs.
Hourly Cost - The default value appearing in the delivery method hourly cost is inherited from the administrator's learning environment. Enter the estimated hourly cost, per learner, of delivering the activity. The system uses the cost entered here to determine the forecasted cost for an activity based on the number of hours defined for each of the activity's components on the recommended duration page.

Step	Action
72.	Enter any learning period information into the **Learning Period** section.

The **Learning Period** fields are used most often for activities with **web-based, test, survey, or assignment delivery method learning components only**. The selections made here may be overridden at the activity level.

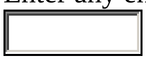
***Learning Period* fields include:**
Learning Period - The number of days after the enrollment date that learners must complete the activity. If the learner has not received a completion status of either '**Completed**' or '**Not Completed**' for an activity, at the end of the learning period the **Auto Mark Activity Completion** process will run changing the learner's status accordingly.
Warning Period Days - The number of days before the end of the learning period that the system sends an email notifying the learner that the learning period is about to expire.



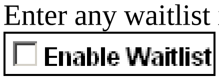
Step	Action
73.	Enter any published duration information into the **Published Duration** section. 

The **Published Duration** sections uses the **Days**, **Hours**, and **Minutes** fields to estimate how long activities should take using the identified delivery method. The values entered here become default values within the **Activity Details** page.

Duration is not related to learning period. Duration is the amount of time the learning activity should actually take to complete, whereas the learning period is the amount of time the learner has to complete the activity. Most often the learning period will be longer than the duration.

Step	Action
74.	Enter any enrollment information into the **Enrollment** section. 

***Enrollment* fields include:**
Max Enrollment (maximum enrollment) - The maximum number of learners that can enroll into an activity. This number can be overridden at the activity level.
Min Enrollment (minimum enrollment) - The minimum number of learners that should enroll in the activity for the activity to be held. If this minimum number is not met before a pre-defined number of days prior to the start of the activity, then the Minimum Enrollment Met Alert notification are sent to the activity administrator to inform them. This number can be overridden at the activity level.
Average Fill Rate - The average number of learners who enroll in the activity each time the activity is offered. This field is informational only.
Enforce Enrollment Limit - Check the checkbox to have the system prevent learners from enrolling in this activity after the maximum enrollment number is reached. To have the system generate a waiting list for this activity, you must select this checkbox. This option can be overridden at the activity level.

Step	Action
75.	Enter any waitlist information into the **Waitlist** section. 

The **Waitlist** fields may be overridden at the activity level.

***Waitlist* fields include:**

Enable Waitlist - Check this checkbox to have the system accept wait-listed learner's once maximum enrollment is reached.
Waitlist Capacity - The maximum number of learners that can be placed on the waiting list. If a learner attempts to enroll in an activity that has a full waiting list, the system displays a message to indicate that the activity is full.
Waitlist Threshold - The maximum number of learners that can be waitlisted. The administrator for the primary learning environment will be notified if this value is exceeded.

Step	Action
76.	Enter any grades and attendance information into the **Grades and Attendance** section. 

The **Grades and Attendance** fields may be overridden at the activity level.

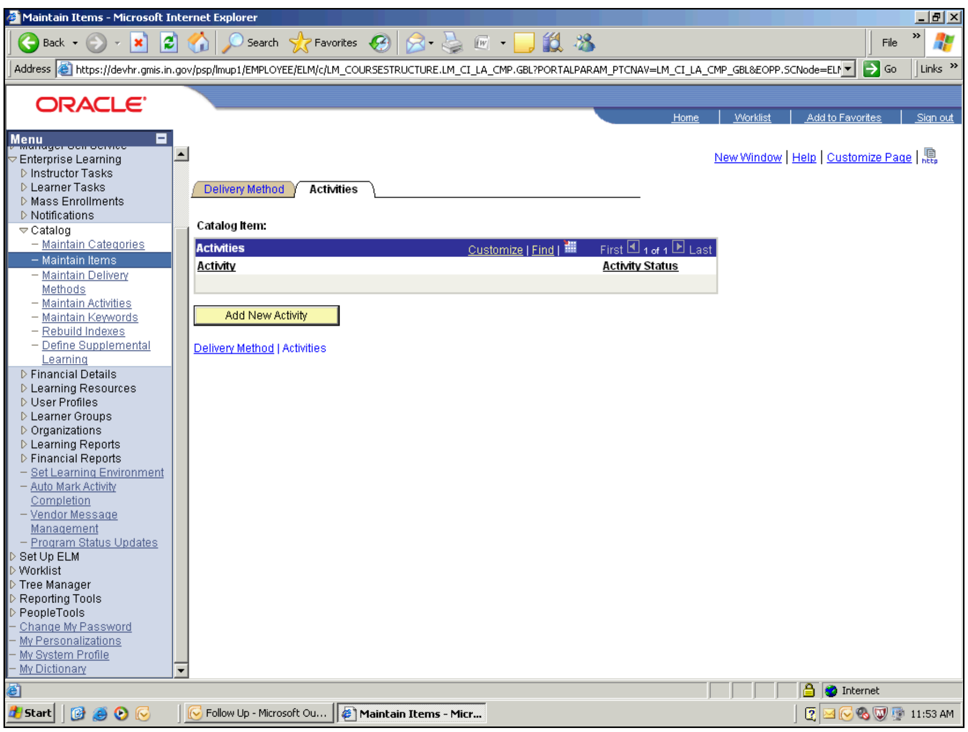
Grades and Attendance **fields include:**
Auto Mark Completion - Check this checkbox to have the system automatically mark attendance at the completion of the activity.

Mark Completion After - If the ***Auto Mark Completion*** is selected, enter the number of days after the activity end date that the system should mark attendance.

Launchable from History - Check this checkbox to have the links associated with **web-based, test, or survey learning components** to be launchable from the learner's ***All Learning*** page. If checked, the learner will always be able to launch the content even after the activity achieves a completion status of '**Completed**' or '**Not Completed**'. **This checkbox must be checked if the *Allow Completion from History* checkbox is checked.**

Allow Completion from History - Check this checkbox to have learners be able to complete learning activities with **web-based, test, or survey learning components** to be launchable from the learner's ***All Learning*** page. This allows a learner to review or test an item as many times as needed. If the ***Launchable from History*** checkbox is checked and this checkbox is not checked, then learners can launch the content from the ***All Learning*** page **but their progress will not be updated and no changes will be made to the activity's completion or passing status**.

Step	Action
77.	Enter any technical requirements (such as plug-ins, a microphone, or a connection speed) for this activity into the **Technical Requirements** field. The system does not display this information to learners. Click in the **Technical Requirements** field.
78.	Click the **Save** link. Save
79.	To enter additional delivery methods for an item, click the **Create New** link. Create New
80.	To review a list of item activities or enter activities for an item, click the **Activities** tab. Activities



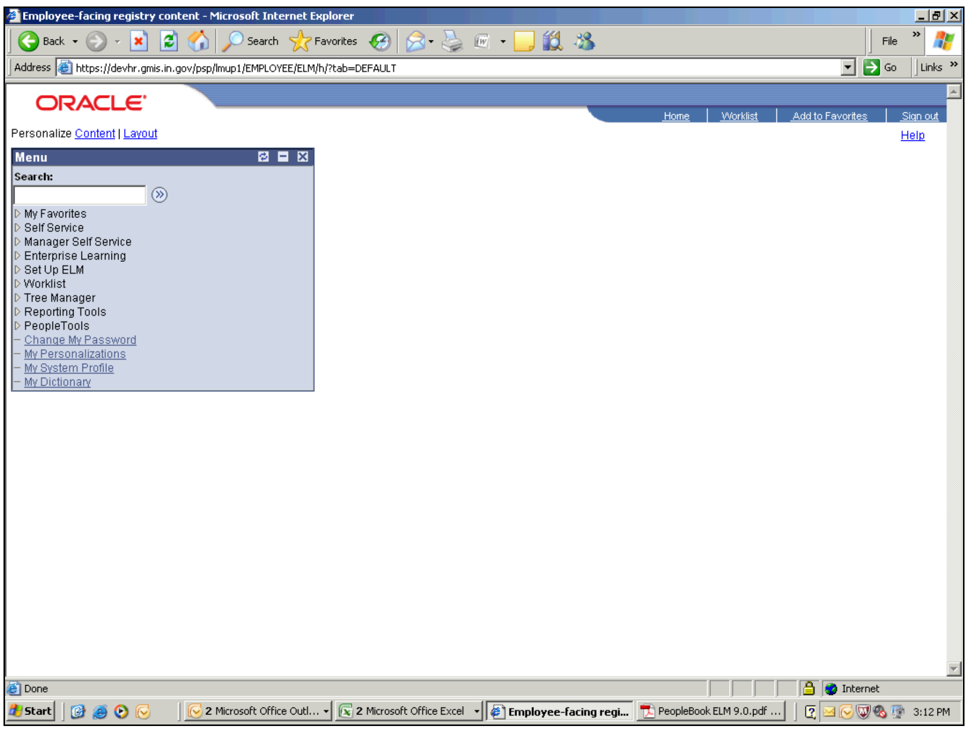
Step	Action
81.	Click the **Add New Activity** button to add new item activities. Add New Activity
82.	Congratulations! You have successfully created and/or updated an item (course). **End of Procedure.**

How to Create/Update Delivery Method

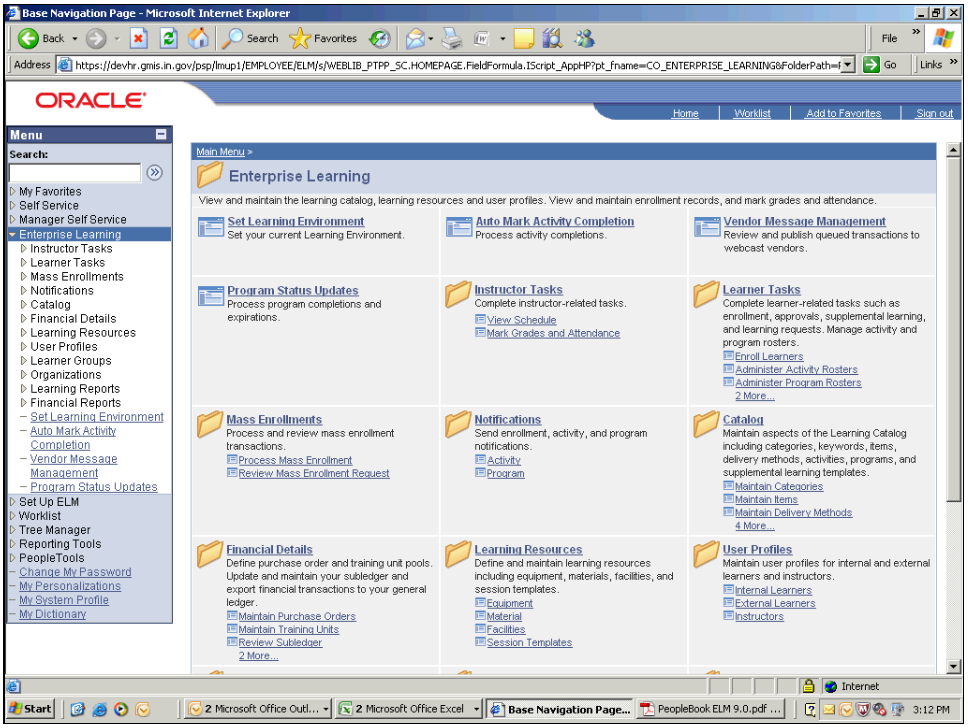
Delivery methods define how course offerings are presented to learners (for example, through online learning, classroom instruction, seminars, books, etc.) within the organization. Learners can search the catalog for offerings by the delivery method that best suits their learning style.

Delivery methods are created for catalog items to identify the specific methods the item's activities are offered. The same catalog item may have multiple delivery methods. There are no restrictions on how many delivery methods can be defined or how they are named.

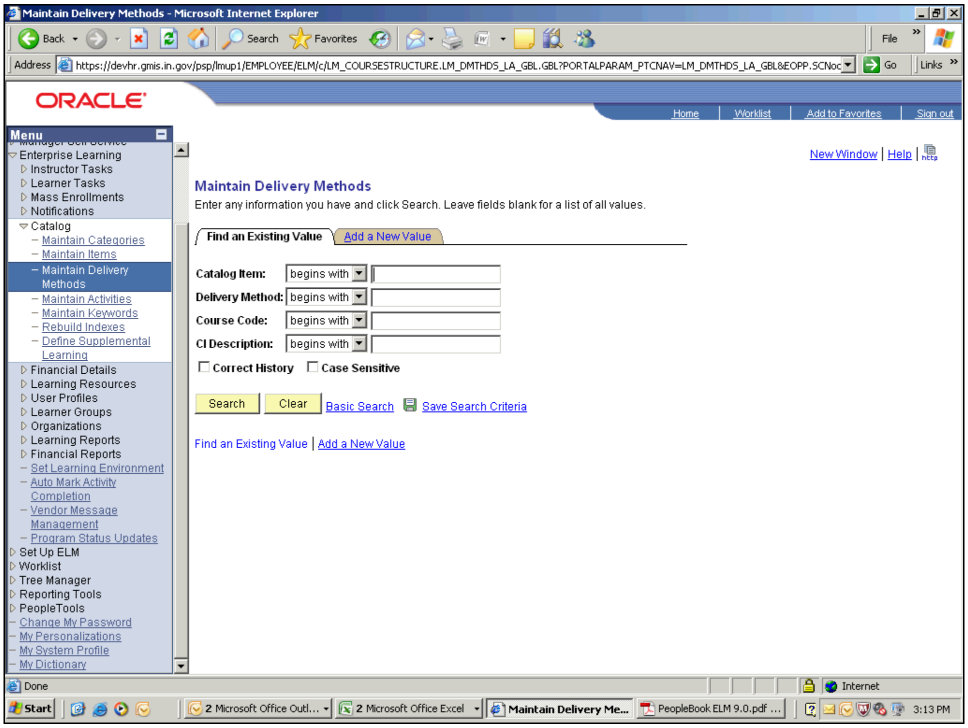
This lesson will teach administrators how to create or update delivery methods.



Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



Step	Action
2.	Click the **Catalog** link. Catalog
3.	Click the **Maintain Delivery Methods** link. Maintain Delivery Methods

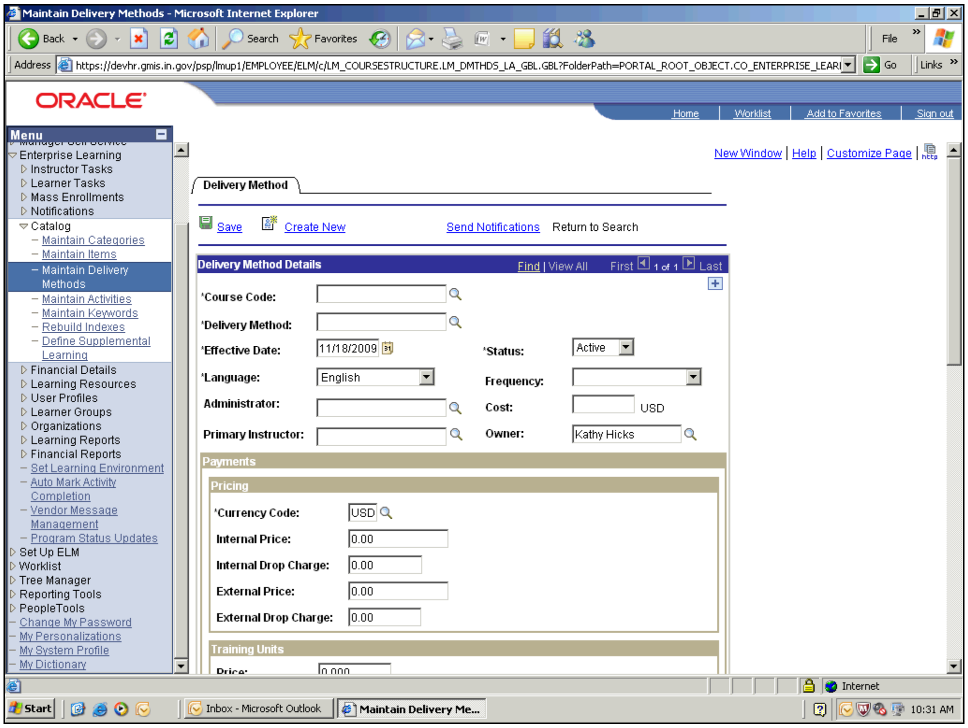


Step	Action
4.	Enter **search criteria** to update an existing delivery method or click the **Add a New Value** tab to create a new delivery method. Add a New Value

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.



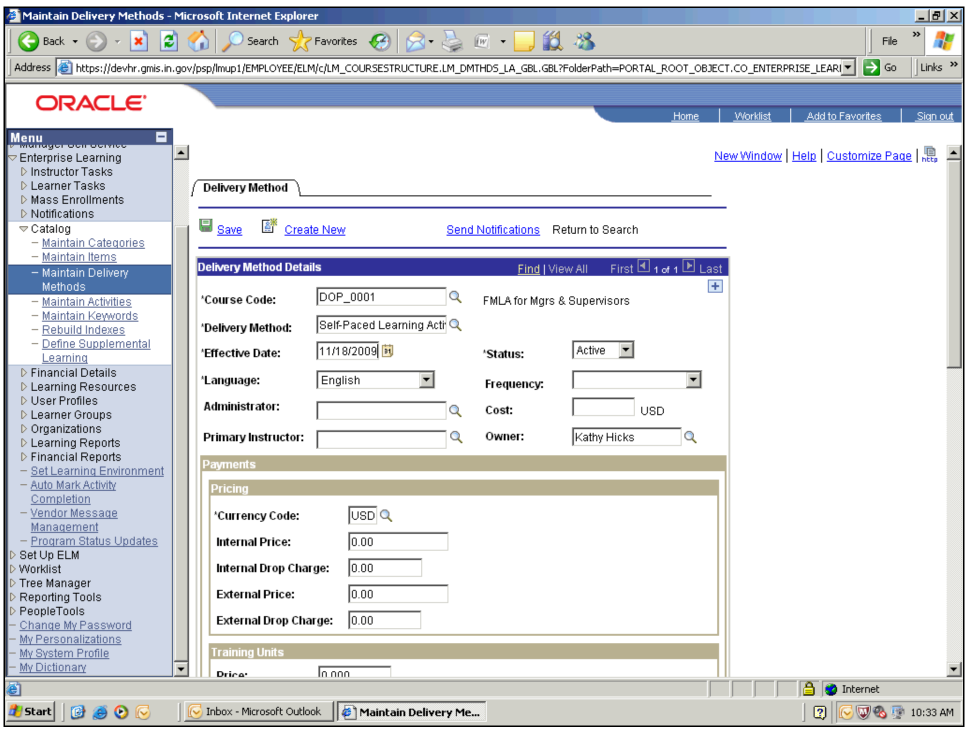
Step	Action
5.	Click the **Course Code Magnifying Glass** button.
6.	Enter **search criteria** for the course code or item (course).

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

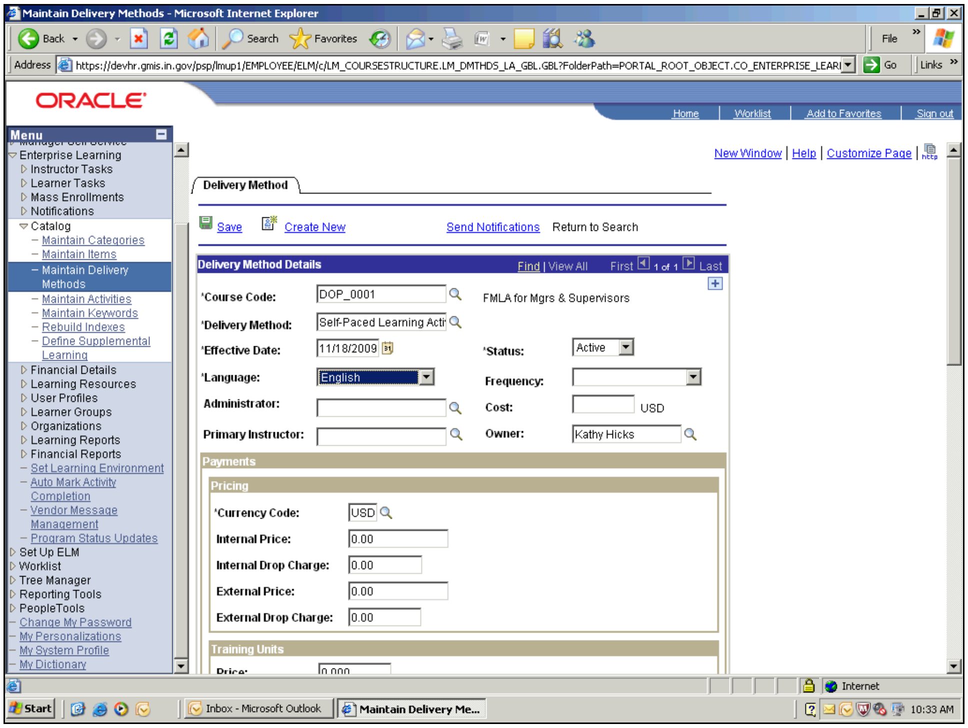
To further define search criteria:

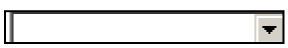
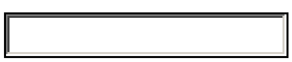
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
7.	Click the **Look Up** button. Look Up
8.	Select the correct item (course) from the list of values. FMLA for Mgrs & Supervisors
9.	Click the **Delivery Method Magnifying Glass** button.
10.	Enter **search criteria** or select a delivery method type from the list of values. Self-Paced Learning Activities
11.	Confirm the effective date in the **Effective Date** field is correct. 11/18/2009



Step	Action
12.	Confirm the delivery method status in the **Status** field is correct. Active



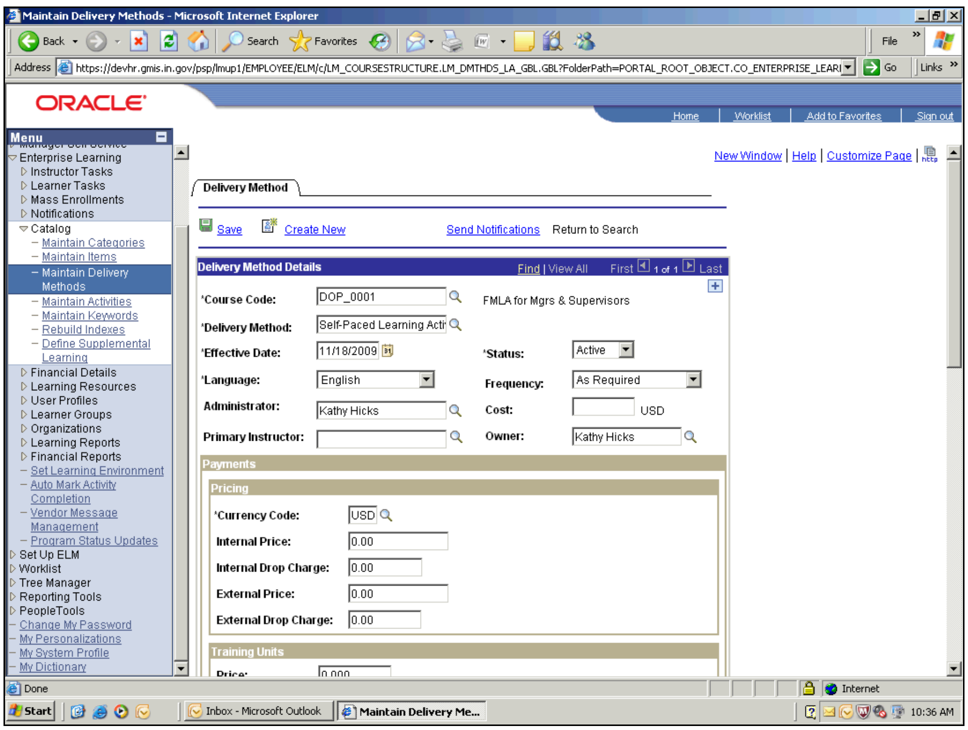
Step	Action
13.	Select the correct frequency in the **Frequency** field from the list of values. 
14.	Click the **Administrator Magnifying Glass** button. 
15.	Enter **search criteria** to locate an enrollment administrator. 

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
16.	Click the **Look Up** button. Look Up
17.	Select the correct administrator from the list of values. HICKS
18.	Confirm or enter a primary instructor in the **Primary Instructor** field, if applicable.
19.	Confirm or enter the delivery method owner in the **Owner** field. Kathy Hicks



Step	Action
20.	Enter any payments information into the **Payments** section.

> The **Payments** section contains **pricing** and **training unit** information associated with the delivery method of an item. Selections made in either the **Pricing** section or the **Training Units** section can be overridden for adjustments at the activity level as needed.

***Pricing* fields include:**
Internal Price - The price to charge internal learners to enroll into item activities. Internal learners are learners who are tracked in PeopleSoft HR as employees, contingent (contract) workers, or persons of interest (board members, external instructors, etc.)
Internal Drop Charge - The amount to charge internal learners for dropping activities after the **drop period**.
External Price - Not used.
External Drop Charge - Not used.

***Training Units* fields include:**
Not used - training units only apply to external learners.

Step	Action
21.	Enter any estimated cost information into the **Estimated Cost** section.

The entered **Estimated Cost** values can be used to calculate forecasted learning costs when training plan budgets are produced that includes activities with this delivery method.

***Estimated Cost* fields include:**
Estimated Cost - The default value appearing in the delivery method estimated cost is inherited from the catalog item. It represents the estimated cost, per learner, of delivering the activity. The system uses the cost entered here to determine the forecasted cost for the activity. This does not include any hourly costs.
Hourly Cost - The default value appearing in the delivery method hourly cost is inherited from the administrator's learning environment. Enter the estimated hourly cost, per learner, of delivering the activity. The system uses the cost entered here to determine the forecasted cost for an activity based on the number of hours defined for each of the activity's components on the recommended duration page.

Step	Action
22.	Enter any learning period information into the **Learning Period** section.

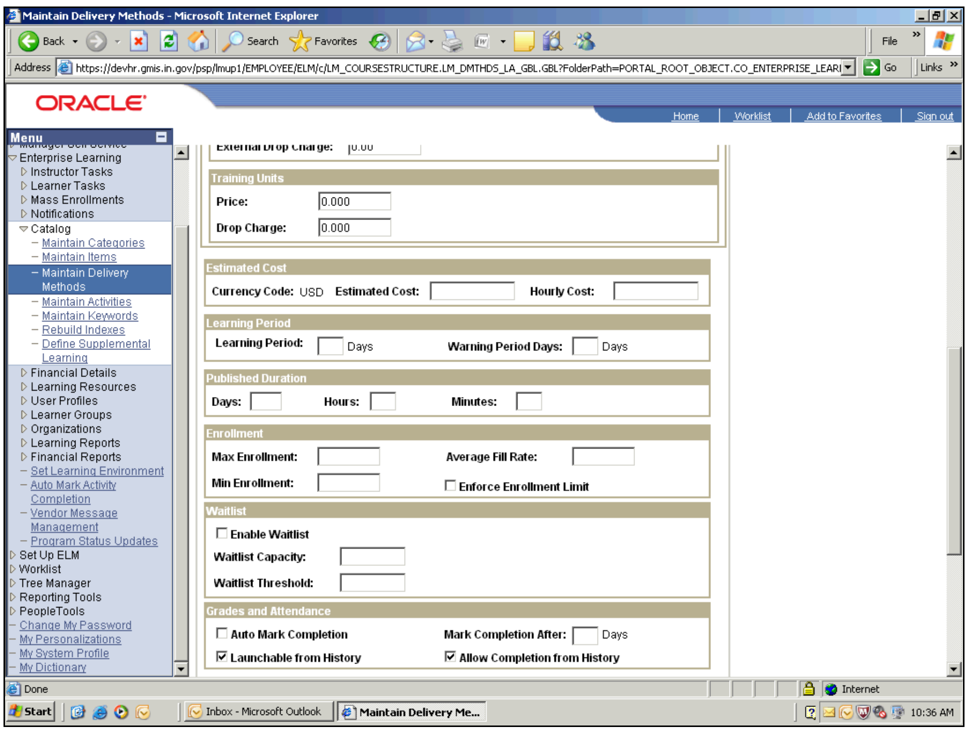
The **Learning Period** fields are used most often for activities with

web-based, test, survey, or assignment delivery method learning components only. The selections made here may be overridden at the activity level.

***Learning Period* fields include:**

Learning Period - The number of days after the enrollment date that learners must complete the activity. If the learner has not received a completion status of either '**Completed**' or '**Not Completed**' for an activity, at the end of the learning period the **Auto Mark Activity Completion** process will run changing the learner's status accordingly.

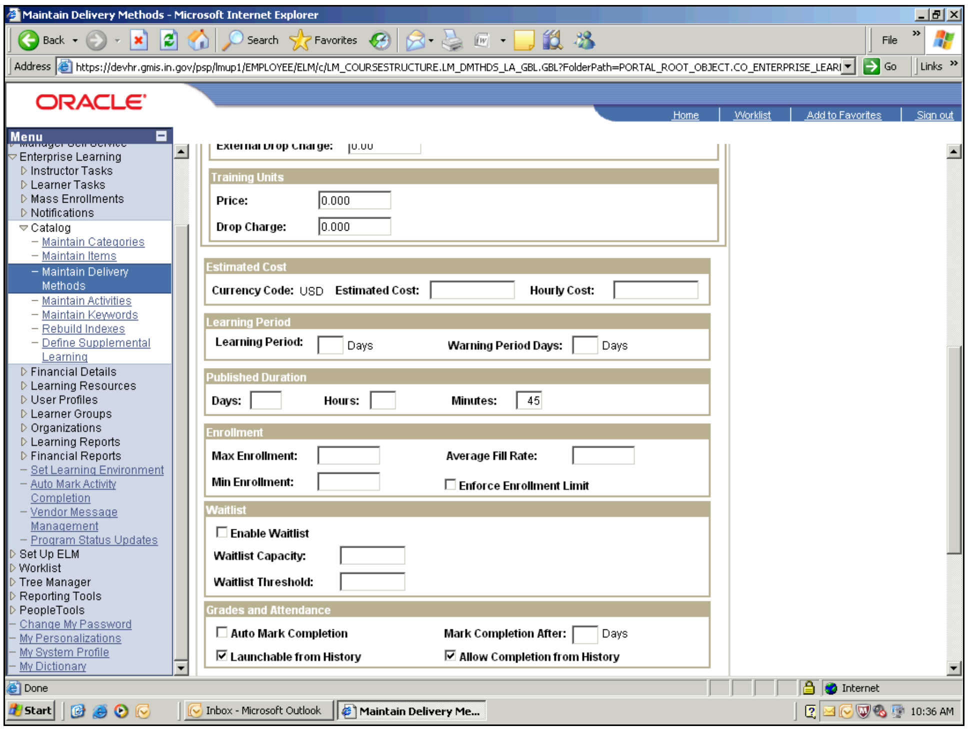
Warning Period Days - The number of days before the end of the learning period that the system sends an email notifying the learner that the learning period is about to expire.



Step	Action
23.	Enter any published duration information into the **Published Duration** section.

The **Published Duration** sections uses the **Days**, **Hours**, and **Minutes** fields to estimate how long activities should take using the identified delivery method. The values entered here become default values within the **Activity Details** page.

Duration is not related to learning period. Duration is the amount of time the learning activity should actually take to complete, whereas the learning period is the amount of time the learner has to complete the activity. Most often the learning period will be longer than the duration.



Step	Action
24.	Enter any enrollment information into the **Enrollment** section.

Enrollment **fields include:**

Max Enrollment (maximum enrollment) - The maximum number of learners that can enroll into an activity. This number can be overridden at the activity level.

Min Enrollment (minimum enrollment) - The minimum number of learners that should enroll in the activity for the activity to be held. If this minimum number is not met before a pre-defined number of days prior to the start of the activity, then the Minimum Enrollment Met Alert notification is sent to the activity administrator to inform them. This number can be overridden at the activity level.

Average Fill Rate - The average number of learners who enroll in the activity each time the activity is offered. This field is informational only.

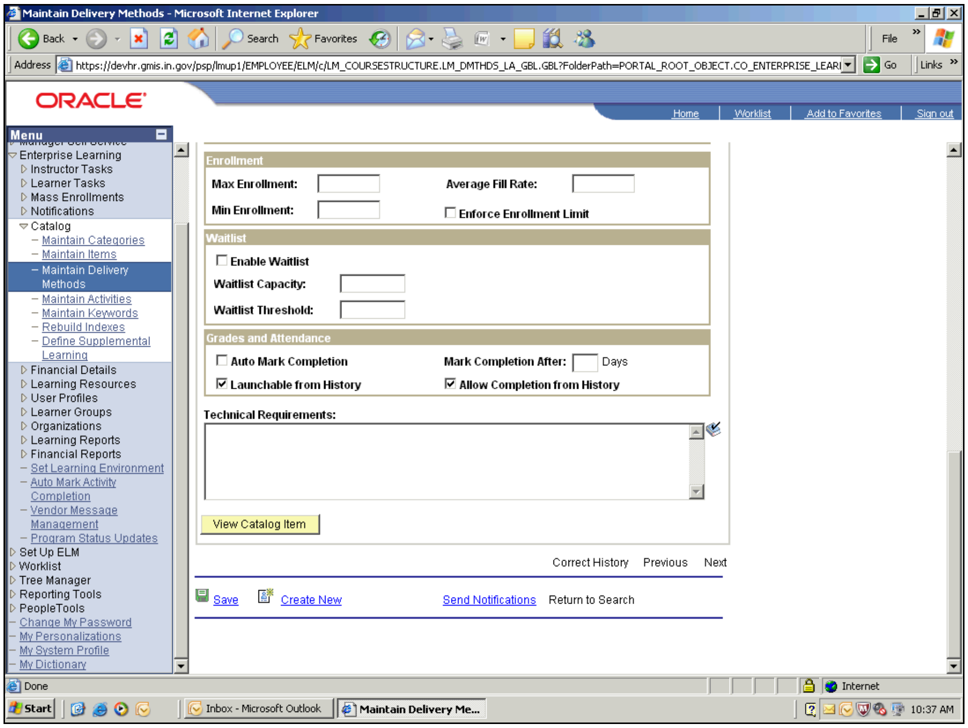
Enforce Enrollment Limit - Check the checkbox to have the system prevent learners from enrolling in this activity after the maximum enrollment number is reached. To have the system generate a waiting list for this activity, you must select this checkbox. This option can be overridden at the activity level.

Step	Action
25.	Enter any waitlist information into the **Waitlist** section.

The **Waitlist** fields may be overridden at the activity level.

***Waitlist* fields include:**
Enable Waitlist - Check this checkbox to have the system accept wait-listed learner's once maximum enrollment is reached.
Waitlist Capacity - The maximum number of learners that can be placed on the waiting list. If a learner attempts to enroll in an activity that has a full waiting list, the system displays a message to indicate that the activity is full.
Waitlist Threshold - The maximum number of learners that can be waitlisted. The administrator for the primary learning environment will be notified if this value is exceeded.

Step	Action
26.	Enter any grades and attendance information into the **Grades and Attendance** section.



Step	Action
27.	Enter any technical requirements (such as plug-ins, a microphone, or a connection speed) for this activity into the **Technical Requirements** field. The system does not display this information to learners.
28.	Click the **Save** link. Save
29.	Congratulations! You have successfully created or updated a delivery method. **End of Procedure.**

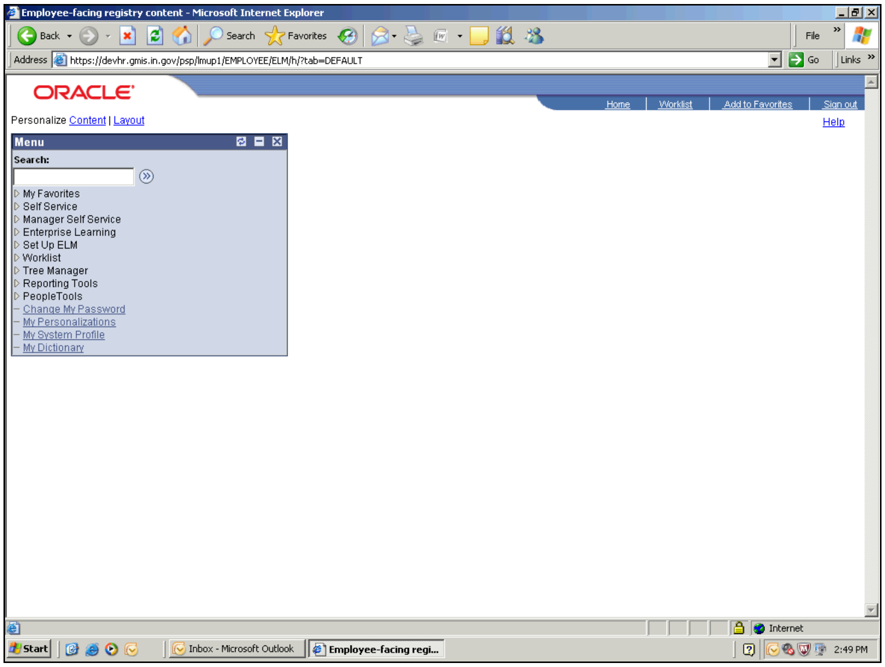
Mass Enrollments

Enrollments consisting of **30 or more** individuals will require **mass enrollment**. Mass enrollment provides an efficient method for handling large volume enrollments by submitting one request for a large number of learners.

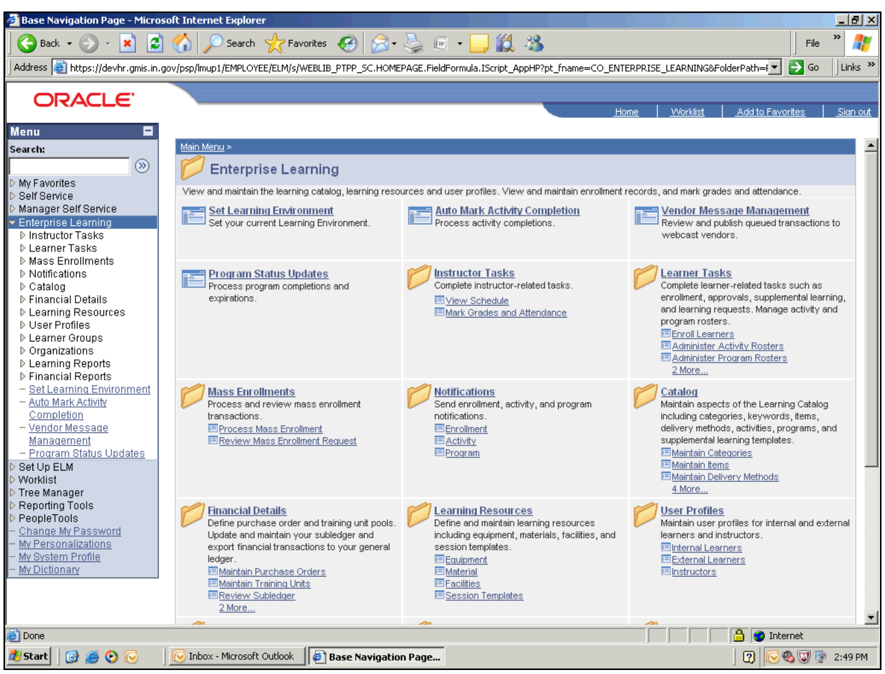
There are three parts to completing mass enrollments:
1. Mass enroll the learners
2. Process the Mass Enrollment
3. Review the Mass Enrollment

How to Mass Enroll Learners

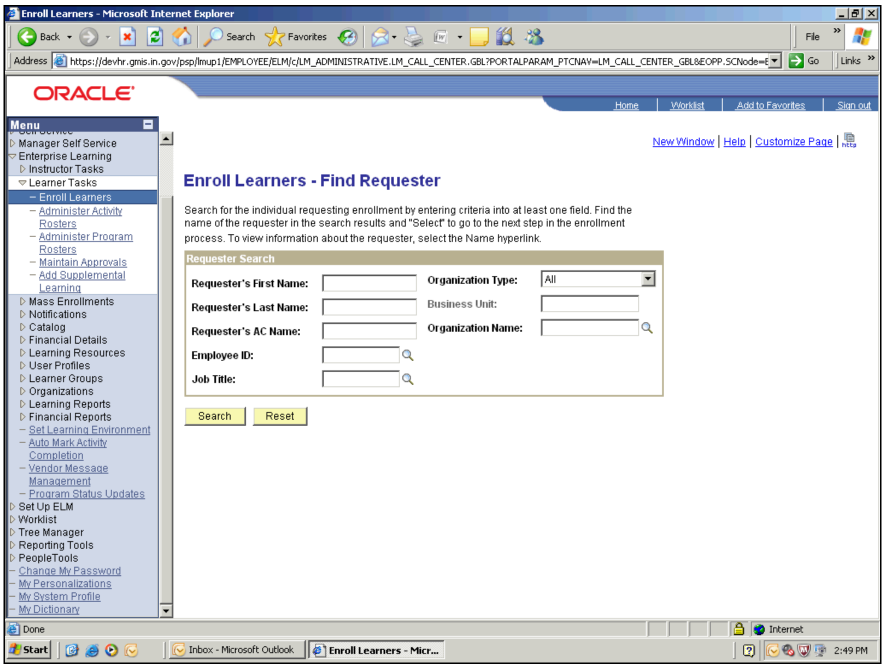
Multiple learners consisting of **30 individuals or more** are considered mass enrollments. This lesson will teach administrators how to mass enroll learner groups into an activity.



Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



Step	Action
2.	Click the **Learner Tasks** link. Learner Tasks
3.	Click the **Enroll Learners** link. Enroll Learners



Step	Action
4.	Enter **search criteria** for the training requester.

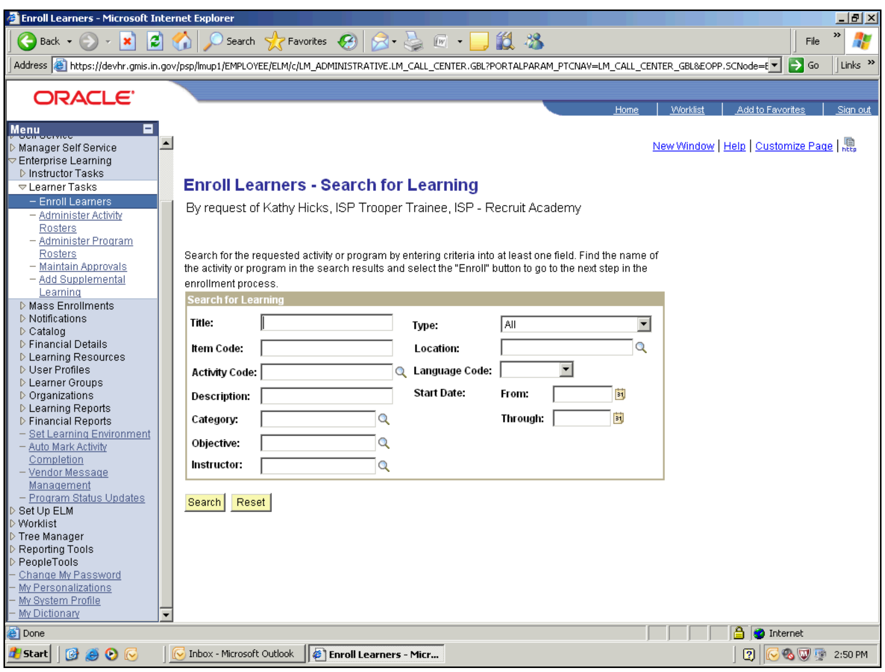
A learning environment and learner group is associated with a learning requester upon a learning request submission. By default, a request inherits the requester's learning environment and the learner group associated with the requester's job and learning profile.

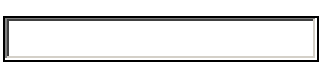
Learners cannot drop activities if they were not the requesters during the enrollment process. A learner can only drop activities that he or she self-enrolls in or are identified as the requestor by an administrator during the enrollment process.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only

	return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined. **<u>To further define search criteria:</u>** Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
5.	Click the **Search** button. 
6.	Click the **Select** button to right of the correct requester to select the requester. 

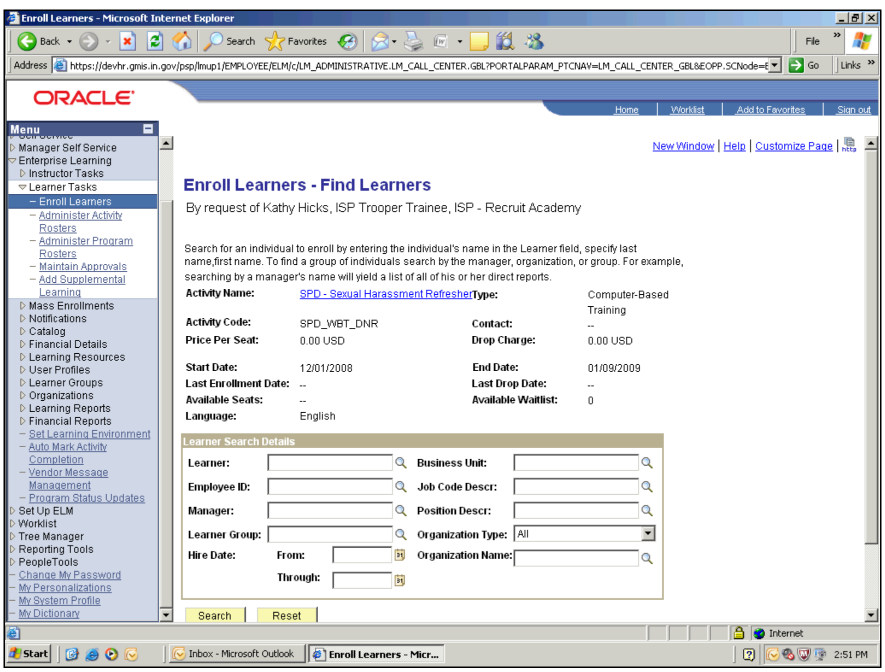


Step	Action
7.	Enter **search criteria** in the **Search for Learning** section, if desired. 

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
8.	Click the **Search** button. Search
9.	Locate the correct activity in the **Select learning for enrollment** section. View 100
10.	Click the **Enroll** button to the right of the correct training activity in the list. Enroll

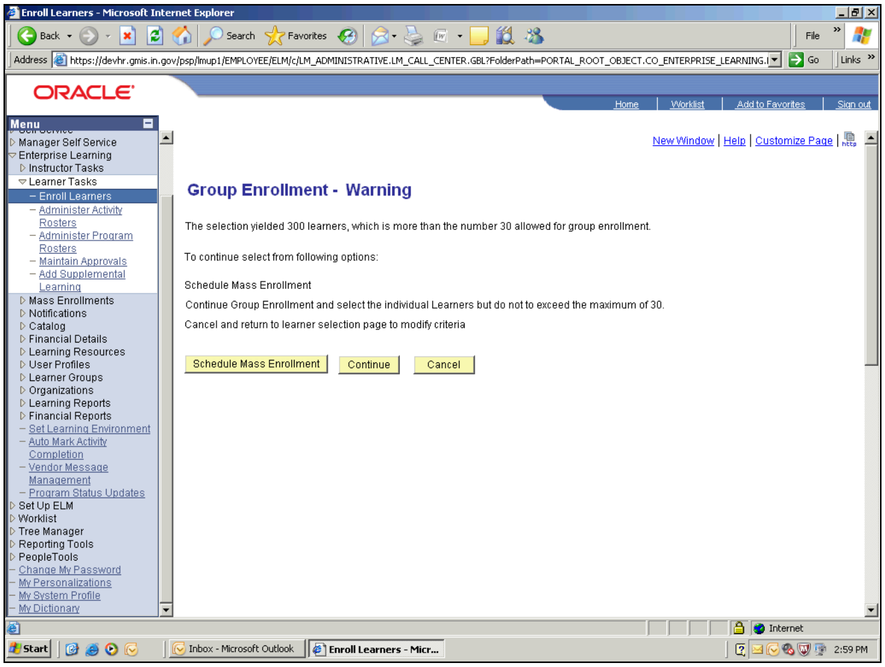


Step	Action
11.	A mass enrollment would include an entire **Learner Group**, **Business Unit**, **Job Code**, **Position**, or **Organization**. Click the **Magnifying Glass** button to the right of the appropriate search field to locate the correct learner group for enrollment.
12.	Enter **search criteria** for the group of learners to mass enroll. Advanced Lookup

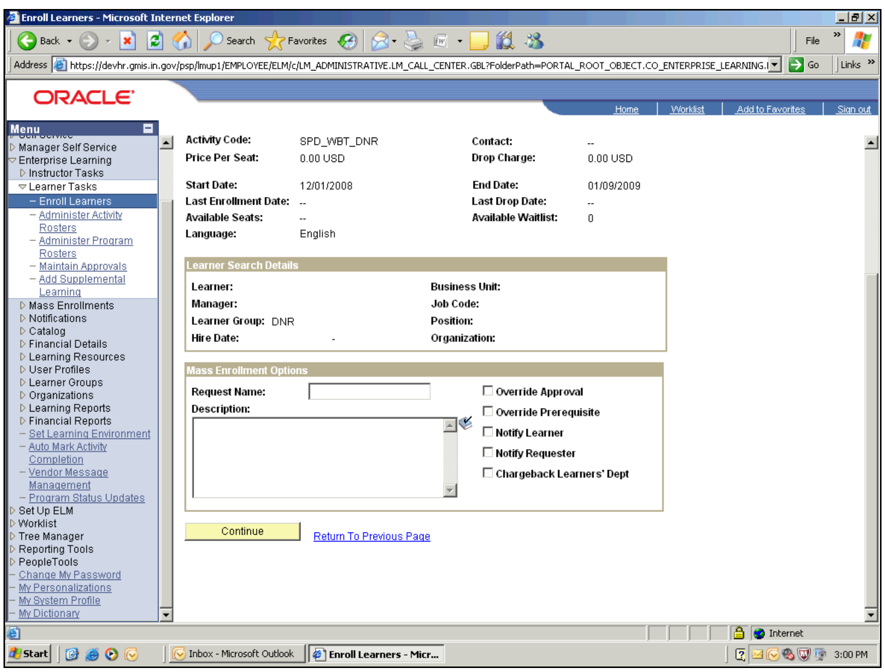
To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
13.	Click the **Look Up** button. Look Up
14.	Select the correct learner group from the list of values. DNR
15.	Click the **Search** button. Search



Step	Action
16.	Click the **Schedule Mass Enrollment** button. Schedule Mass Enrollment



Step	Action
17.	Click in the **Request Name** field.
18.	Enter a request name to identify the mass enrollment in the **Request Name** field of the **Mass Enrollment Options** section.

	The request name appears in the **Description** column on the **Mass Enrollment Requests** page. This indicative label and/or some form of date stamp will assist with identifying the request when reviewing all mass enrollment requests.

Step	Action
19.	Check the **Override Approval** checkbox, if desired. Override Approval

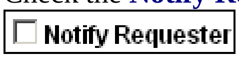
	Check this checkbox to override manager and administrator approval for all learners. If the activity requires approval and the checkbox is left unchecked, the system sets the enrollment status for all learners to **Pending Approval**. This option does not override payment approvals that the system requires when a training unit pool or purchase order has an owner assigned.

Step	Action
20.	Check the **Override Prerequisite** checkbox, if desired. Override Prerequisite

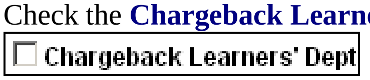
	Check this option to override required and enforced prerequisites for all learners.

Step	Action
21.	Check the **Notify Learner** checkbox, if desired. Notify Learner

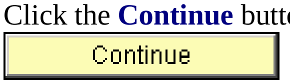
This option sends an email notification to all learners **whose enrollment fails**. The system will automatically send email notification to all learners that are enrolled successfully.

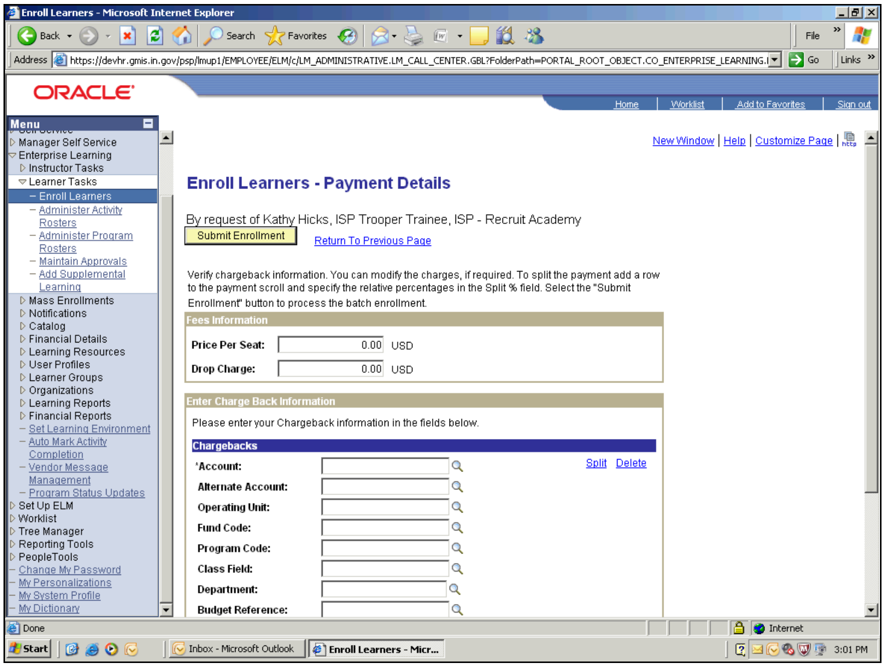
Step	Action
22.	Check the **Notify Requester** checkbox, if desired. 

This option sends an email notification to the requester upon completion of the process. The notification includes how many learners are successfully and unsuccessfully enrolled.

Step	Action
23.	Check the **Chargeback Learners' Dept** checkbox, if desired. 

This option uses each learner's chargeback information, **rather than use the requester's chargeback information for all learners**.

Step	Action
24.	Enter a description of the mass enrollment request to be displayed on the ***Review Mass Enrollment*** report in the **Description** field of the **Mass Enrollment Options** section, if desired.
25.	Click the **Continue** button. 



Step	Action
26.	Confirm and/or change fees information as required in the **Fees Information** section.

The **Fees Information** fees and drop charges for an activity default from the **Activity Details** page. The section is used to modify activity fees and drop charges for each learner.

***Fees Information* fields include:**
Price Per Seat - A price for the activity.
Drop Charge - A drop charge for the activity.

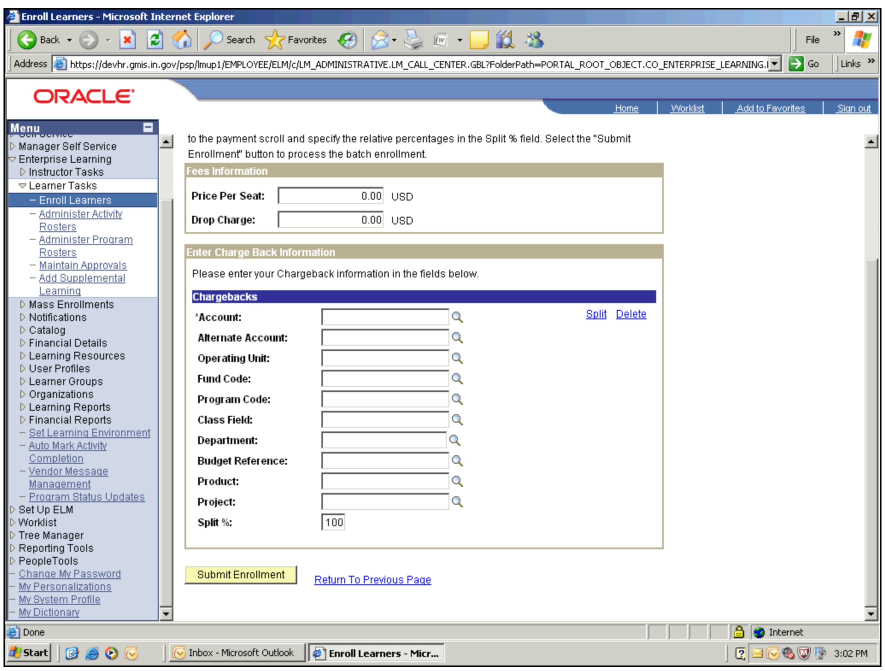
Prices can increase or decrease after enrollment and drop charges may be changed at any time. **Changes to drop charges take affect only if the changes are made before dropping the learner.** The system does not allow changes to drop charges for a learner after the learner has been dropped.

Any changes to activity prices or drop charges result in a new transaction row for the enrollment record enabling the tracking of all payment changes to an enrollment record.

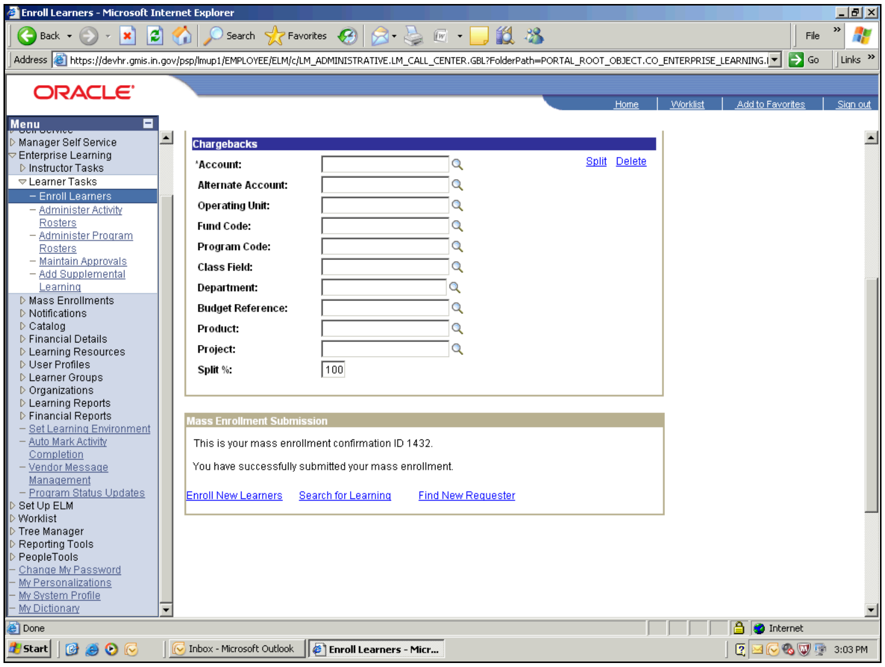
Step	Action
27.	Confirm and/or change activity chargeback information as required and/or available in the **Enter Charge Back Information - Chargebacks** section.

The **Enter Charge Back Information** section is used to enter chargeback account information. The ChartField values appear by default from the general ledger business unit that is mapped to the PeopleSoft HR business unit the requester belongs to.

If the **Chargeback Learners' Dept** checkbox is checked on the **Mass Enrollment** page, the system hides the **Enter Charge Back Information** section.



Step	Action
28.	Click the **Submit Enrollment** button. Submit Enrollment



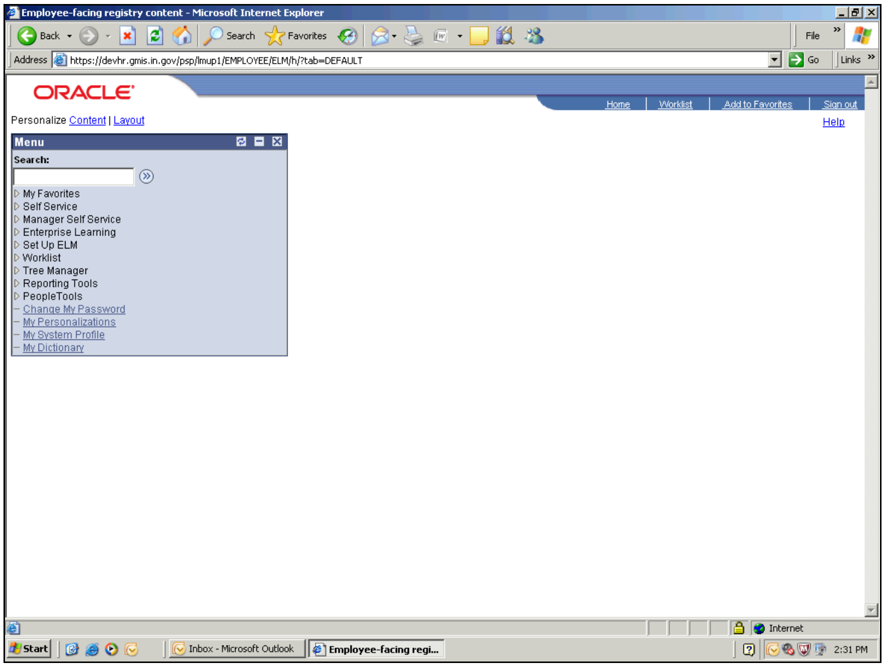
Step	Action
29.	The system displays the **mass enrollment confirmation ID** number in the **Mass Enrollment Submission** section.

	If a mass enrollment **request name** or **description** was not entered, use this number to locate the mass enrollment during the ***Mass Enrollment Request*** process to view the status of the mass enrollment.

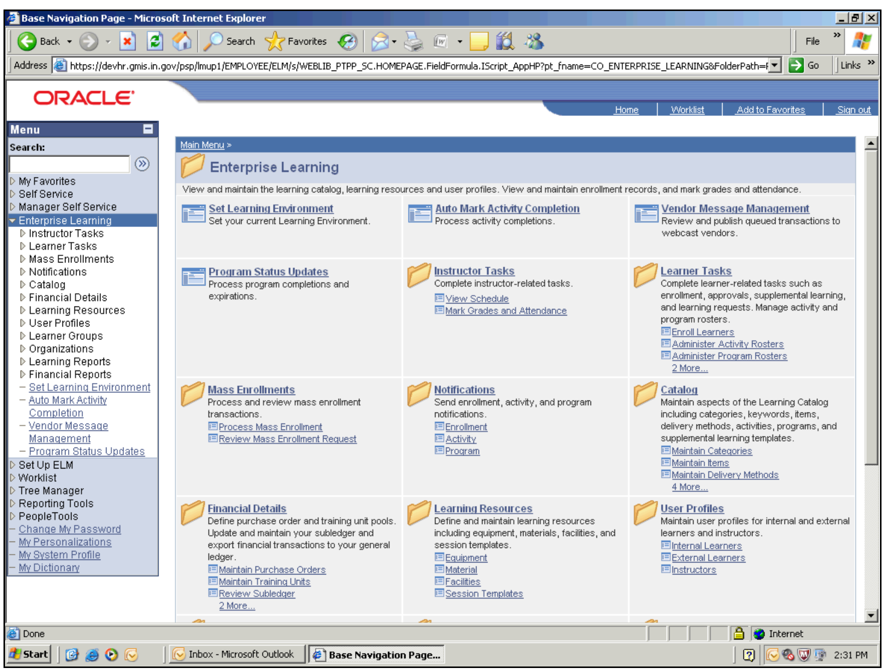
Step	Action
30.	Congratulations! You have successfully completed a mass enrollment. **End of Procedure.**

How to Process Mass Enrollments

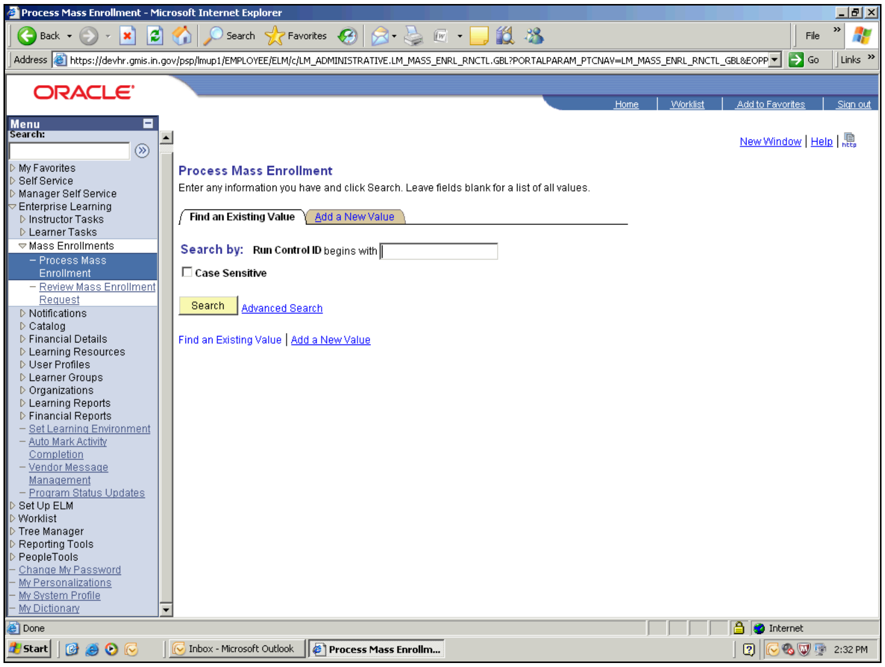
This lesson will teach administrators how to process mass enrollment requests.



Step	Action
31.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



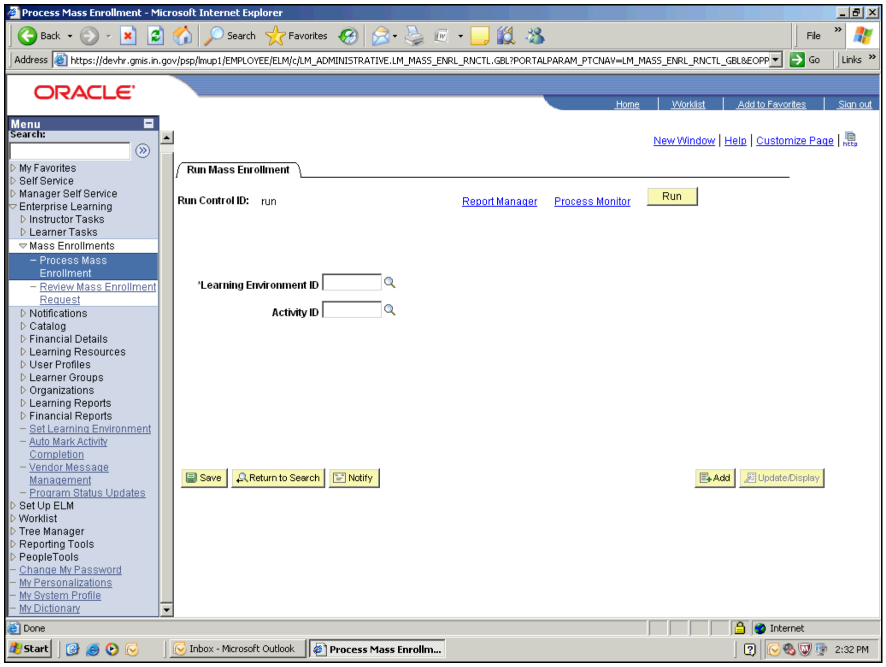
Step	Action
32.	Click the **Mass Enrollments** link. Mass Enrollments
33.	Click the **Process Mass Enrollment** link. Process Mass Enrollment



Step	Action
34.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab.

A **Run Control ID** identifies the person who is running a process within the system. The **Run Control ID** is not an assigned value but is created by the person using the system. A **Run Control ID** may be a person's name, PeopleSoft ID number, etc.

Step	Action
35.	Click the **Search** button. Search



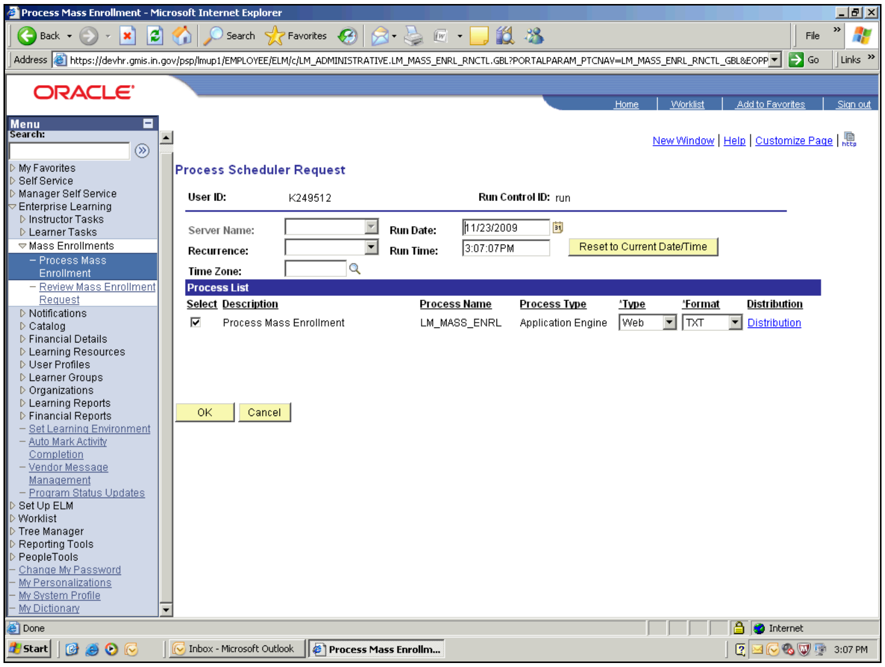
Step	Action
36.	Click the **Learning Environment ID Magnifying Glass** button.
37.	Search for or select the correct **Learning Environment ID** from the list of values. 1

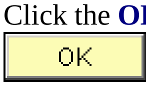
To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

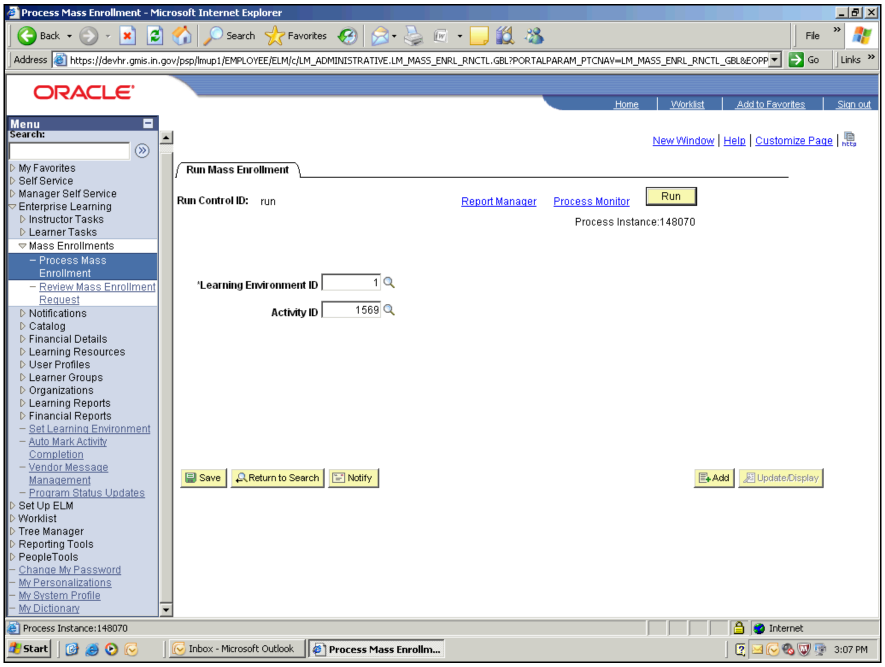
To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
38.	Click the **Activity ID Magnifying Glass** button.
39.	Search for or select the correct **Activity ID** from the list of values. Advanced Lookup

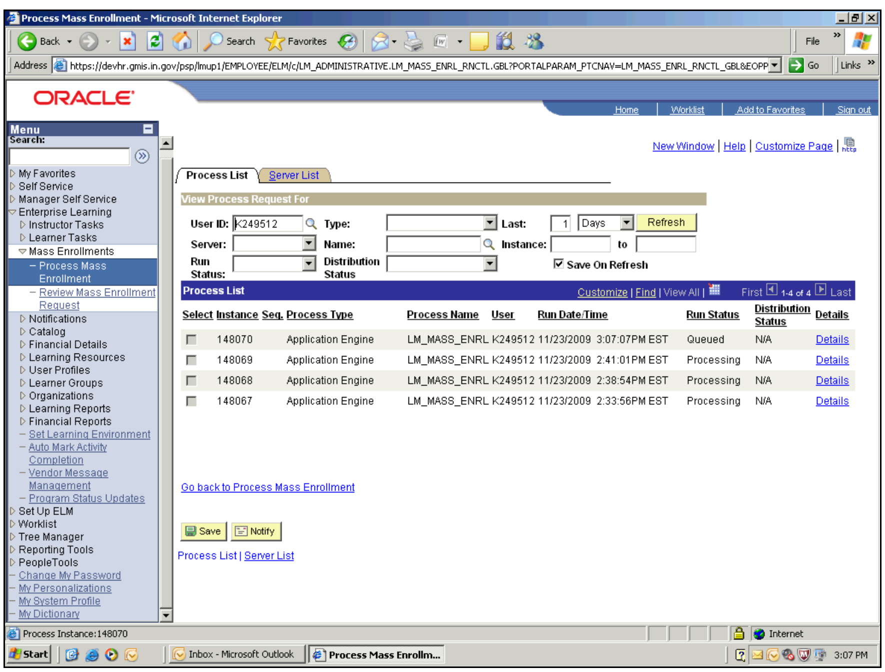
Step	Action
40.	Click the **Run** button. 



Step	Action
41.	Click the **OK** button. 



Step	Action
42.	Click the **Process Monitor** link. Process Monitor



Step	Action
43.	Click the **Refresh** button until the **Run Status** column status is **Success** and the **Distribution Status** column status is **Posted**. Refresh

It may be necessary to click the **Refresh** button several times to receive the correct **Run Status** column and **Distribution Status** column statuses.

When running multiple reports, reference the **Run Date/Time** column to locate the most recent report ran. This most often will be the report at the top of the **Process List** section.

Step	Action
44.	Congratulations! You have successfully processed a mass enrollment request. **End of Procedure.**

Learner Groups

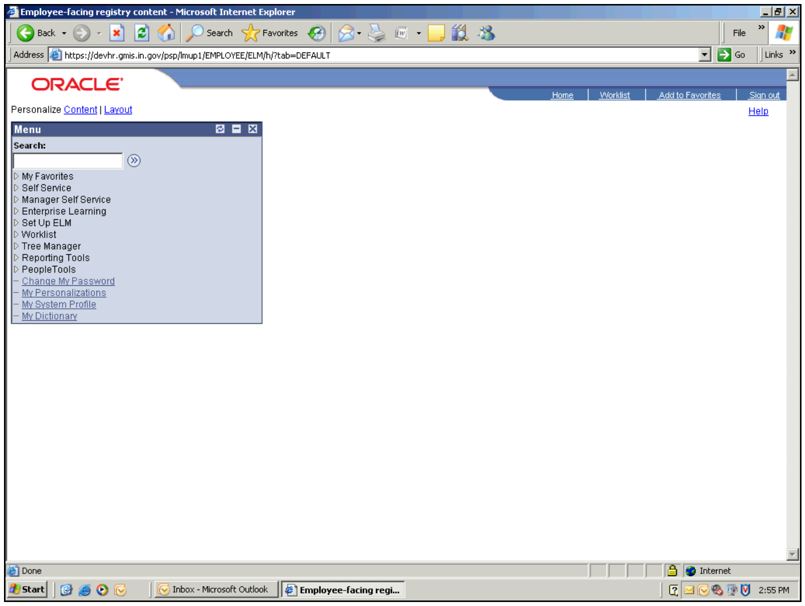
A **Learner Group** identifies groups of learners who will complete training together. Learner groups can be created by Business Unit, individual Learner ID, Job Codes, etc.

One of the primary functions of learner groups is to control access to the learning catalog. For a user to access a particular activity (session) in the catalog, the user must belong to a learner group that is assigned to the **activity** (session), the **catalog item** (course), and the **category** (State agency) that's associated with the catalog item.

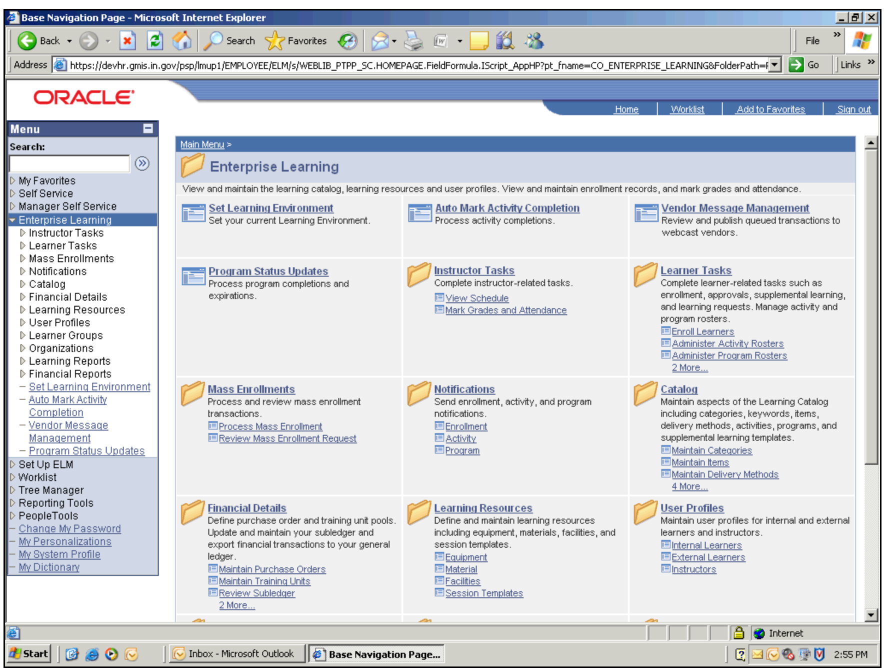
Learner group data is defined by associating a Learner Group with a **Learning Environment and owner** (administrator). Learning environments control which parts of the catalog an administrator can view and update, as well as the default values and options that are associated with the objects (such as categories, catalog items, activities, and programs). The learning environment also enables administrators to access the instructors and resources that are available for assignment.

How to Add Learner Group

Define learner group data by associating the learner group with a learning environment and owner. This lesson will teach administrators how to add a learner group.

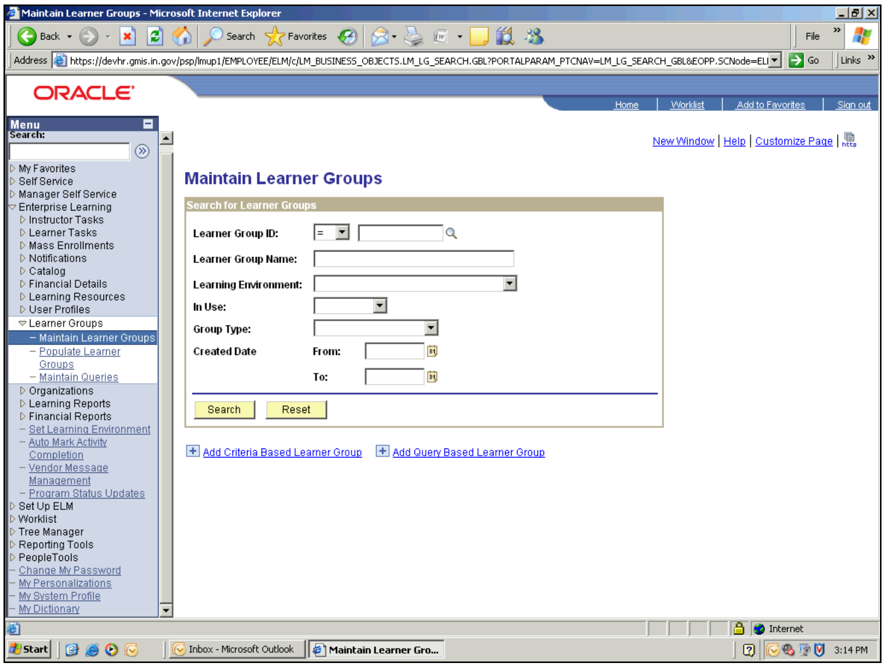


Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



Step	Action
2.	Click the **Learner Groups** link. ▷ Learner Groups

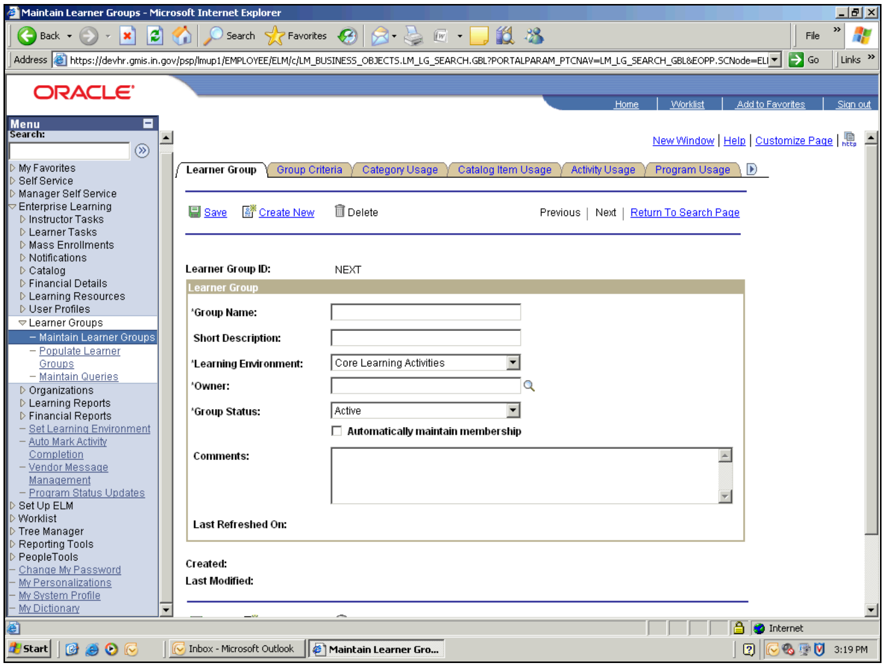
Step	Action
3.	Click the **Maintain Learner Groups** link. Maintain Learner Groups



Step	Action
4.	The **Add Criteria Based Learner Group** option creates a new learner group with group members based on specified group criteria, such as business unit, department, or job code. Click the **Add Criteria Based Learner Group** link. Add Criteria Based Learner Group

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.



Step	Action
5.	Click in the **Group Name** field.
6.	Enter a group name into the **Group Name** field.

It is recommended to use the **agency acronym** (such as DOC, DCS, FSSA, DNR, etc.) at the beginning of the title.

Step	Action
7.	Click in the **Short Description** field.
8.	Enter the group name abbreviation into the **Short Description** field.
9.	Click the **Learning Environment** drop-down menu button. 
10.	Select the learning environment to associate with the learner group from the list of values. Core Learning Activities

Step	Action
11.	Click the **Owner Magnifying Glass** button. 

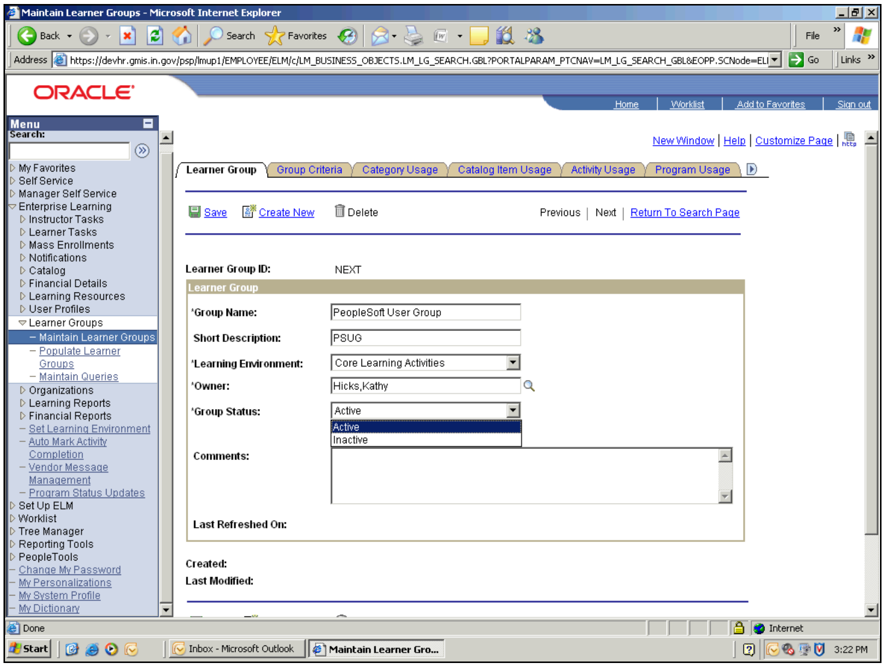
This field is for documentation purposes only.

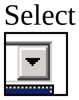
Step	Action
12.	Enter search criteria for the learner group owner name. 

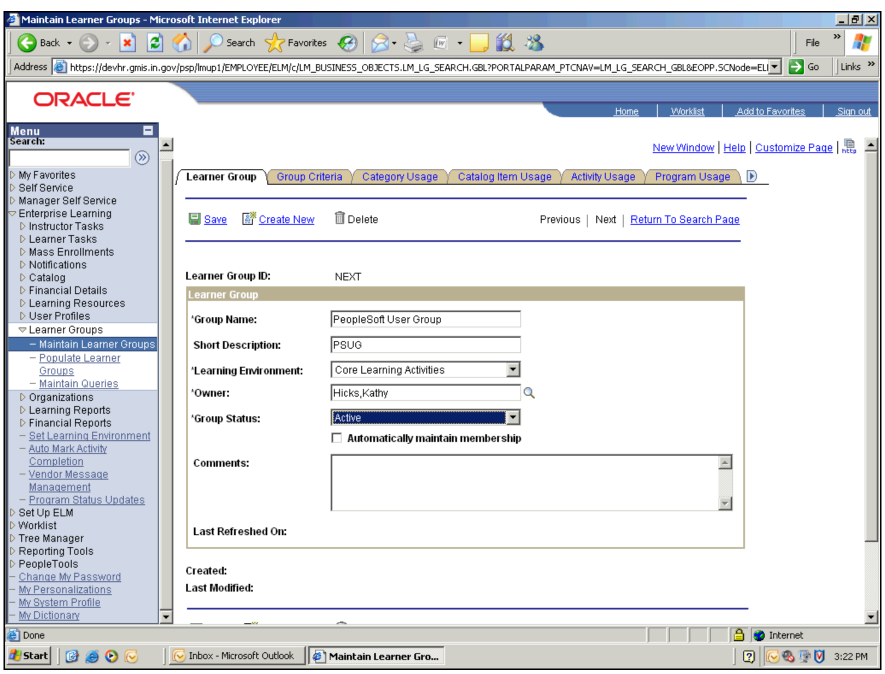
To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
13.	Click the **Look Up** button. 
14.	Select the correct person from the list of values. 
15.	Click the **Group Status** drop-down menu button. 



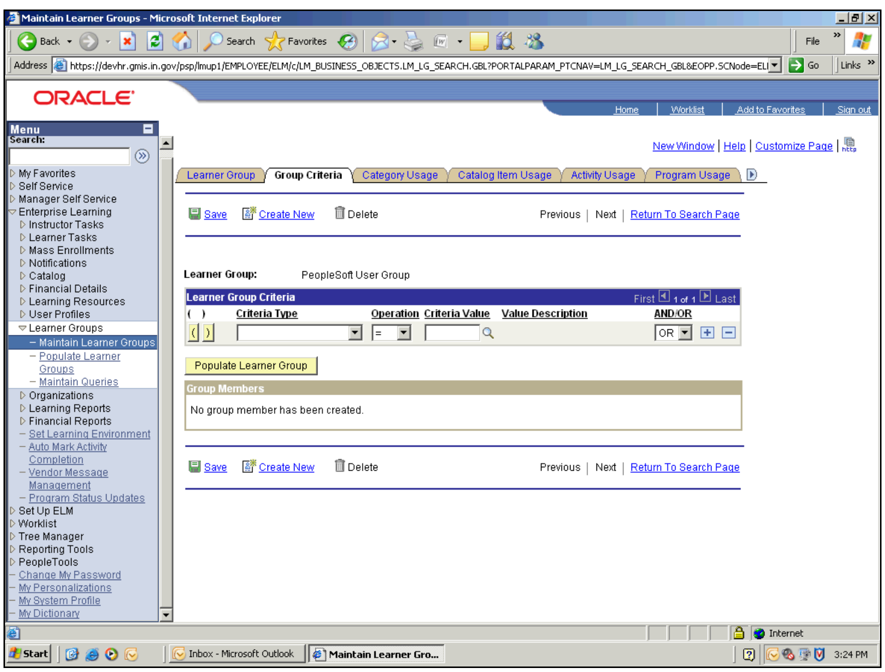
Step	Action
16.	Select **Inactive** while developing a new learner group or for groups no longer in use. Select **Active** when the group is ready for use. 



Step	Action
17.	When checked, the **Automatically maintain membership** checkbox will automatically update learner group membership when the ELM system update occurs. Check the **Automatically maintain membership** checkbox.

The ELM integration runs **three times per day** to update (refresh) system data. The integration process currently occurs at **9:00 a.m., 2:00 p.m., and 7:00 p.m**. System changes made prior to a refresh will not show in the system until after the update occurs.

Step	Action
18.	Click in the **Comments** field to enter any learner group related comments.
19.	Click the **Group Criteria** tab. Group Criteria



Step	Action
20.	Click the **Criteria Type** drop-down menu button.
21.	Select the correct **criteria type** from the list of values. Department
22.	Click the **Operation** drop-down menu button to change the operation criteria if needed.

Operation values include:
- < Less than
- <= Less than or equal to
- <> Not equal to
- = Equal to
- > Greater than
- >= Greater than or equal to

Step	Action
23.	Click the **Criteria Value Magnifying Glass** button.
24.	Enter search criteria for the correct **criteria value**.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
25.	Enter the desired information into the **Organization Name** field. Enter "**SPD**".
26.	Click the **Look Up** button. Look Up
27.	Select the correct organization from the list of values. SPD - HR Mgmt Info Svcs Div
28.	If additional **Learner Group Criteria** needs to be defined, click the **Add a new row** button to add the additional information. +
29.	Click the **Populate Learner Group** button. Populate Learner Group
30.	Scroll down the page to review the learner group member information.
31.	Click the **Save** link. Save
32.	Congratulations! You have successfully added a learner group. **End of Procedure.**

How to Populate Learner Group

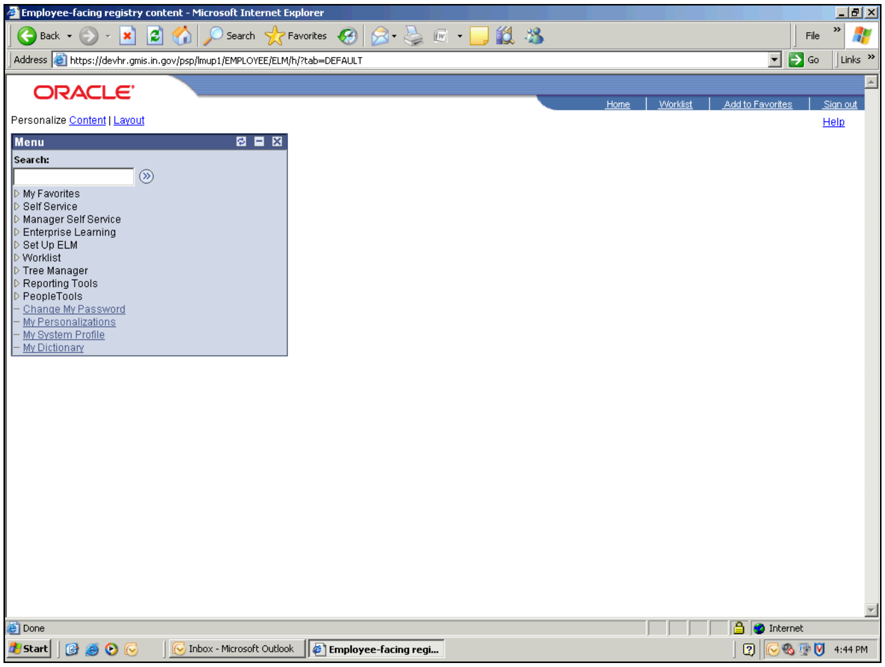
When a learner group is created, there are two options for populating the group:

1. Click the **Populate Learner Group** button on the **Group Criteria** page or;
2. Run the **Populate Learner Group** process.

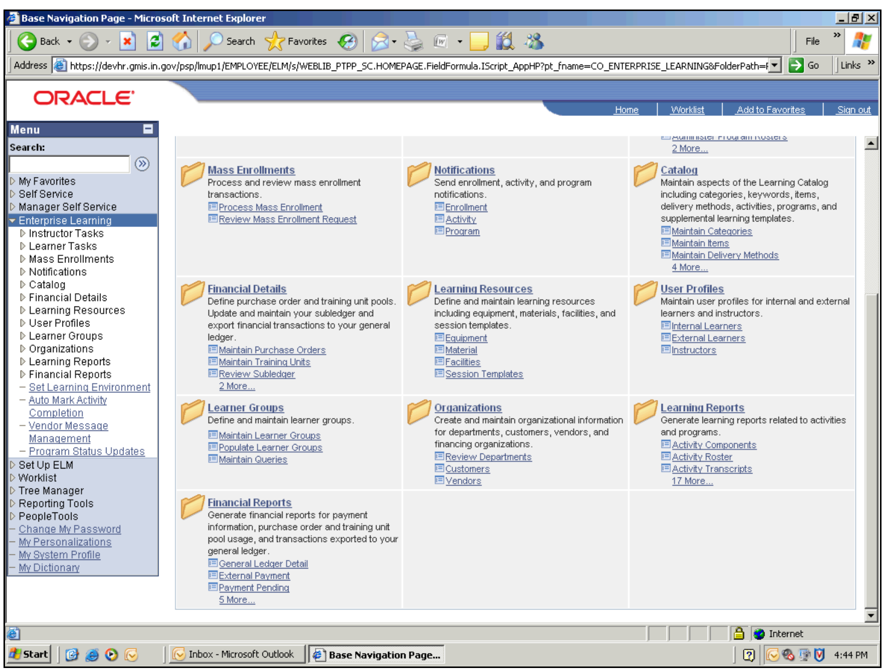
When running the process for all scheduled groups, the system refreshes any automatically-maintained, criteria-based learner groups that are affected by changes that have been made to learner or department profiles.

After populating a learner group, view the members through **Maintain Learner Groups**.

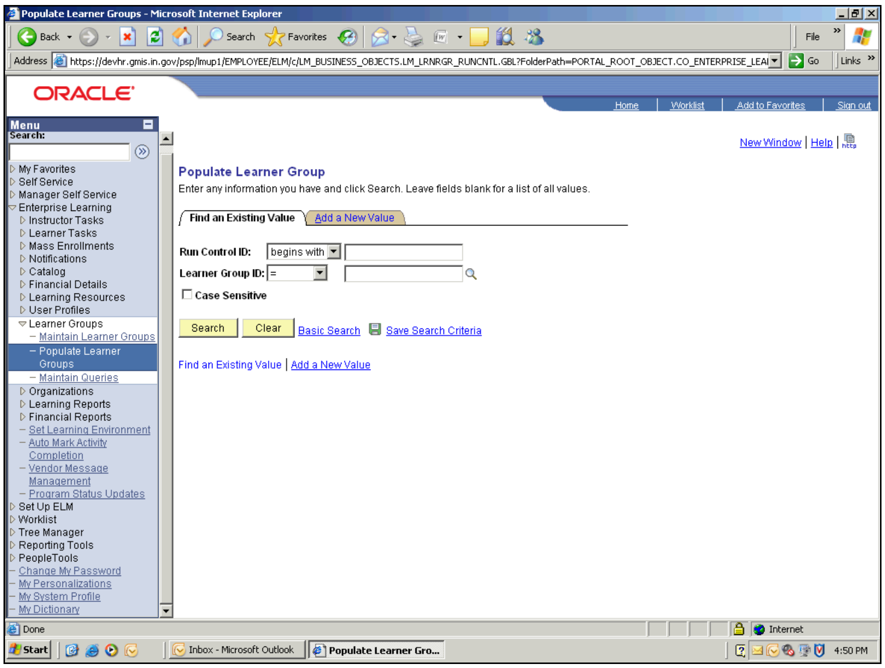
This lesson will teach administrators how to populate learner groups using the **Populate Learner Group** process.



Step	Action
1.	Click the **Enterprise Learning** link. 

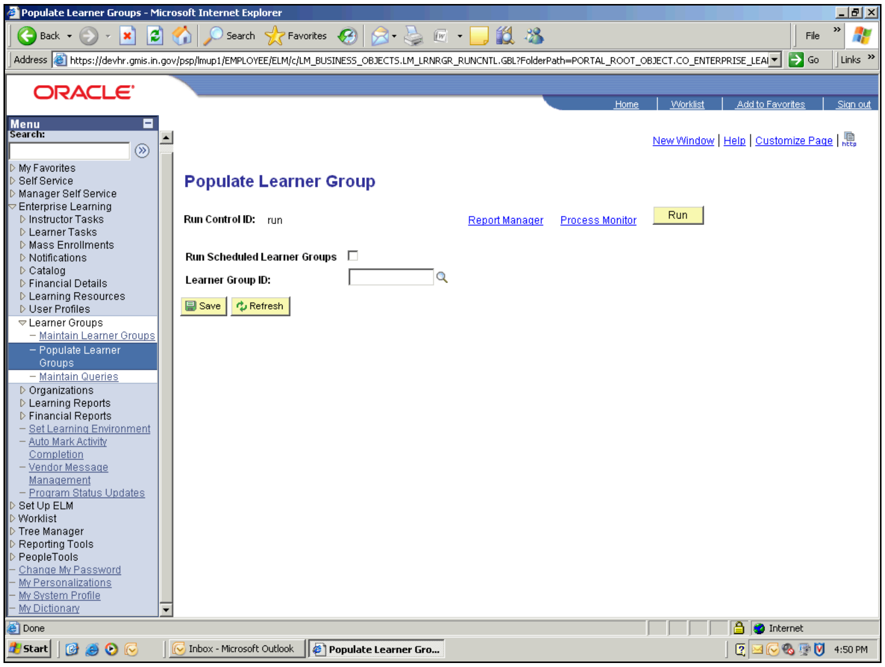


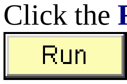
Step	Action
2.	Click the **Learner Groups** link. Learner Groups
3.	Click the **Populate Learner Groups** link. Populate Learner Groups

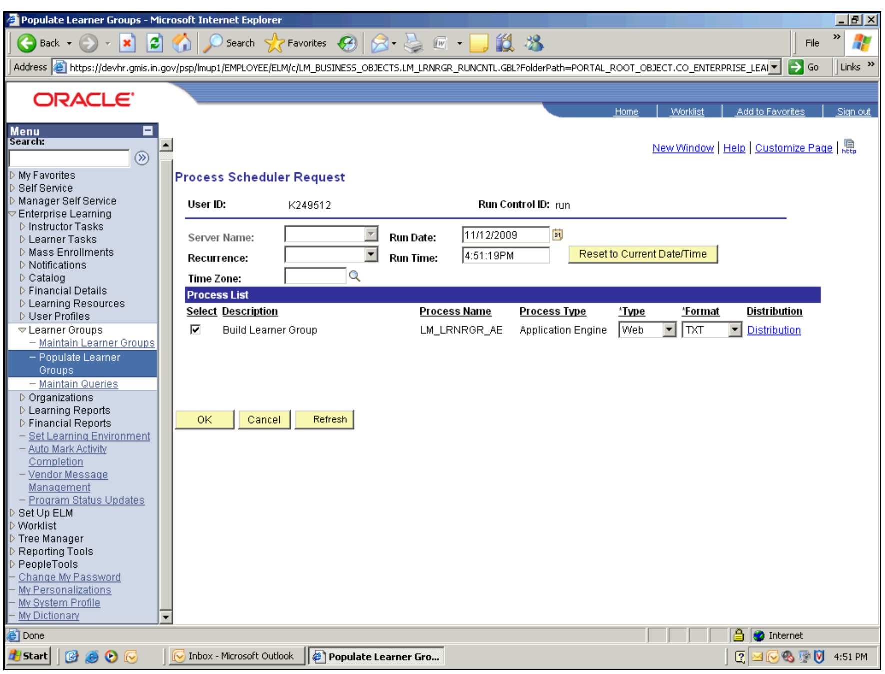


Step	Action
4.	Enter a **Run Control ID** into the **Run Control ID** field and click the **Search** button. To establish a **Run Control ID**: 1. Click the **Add a New Value** tab. 2. Enter a **Run Control ID** into the **Run Control ID** field. 3. Click the **Add** button. Add a New Value

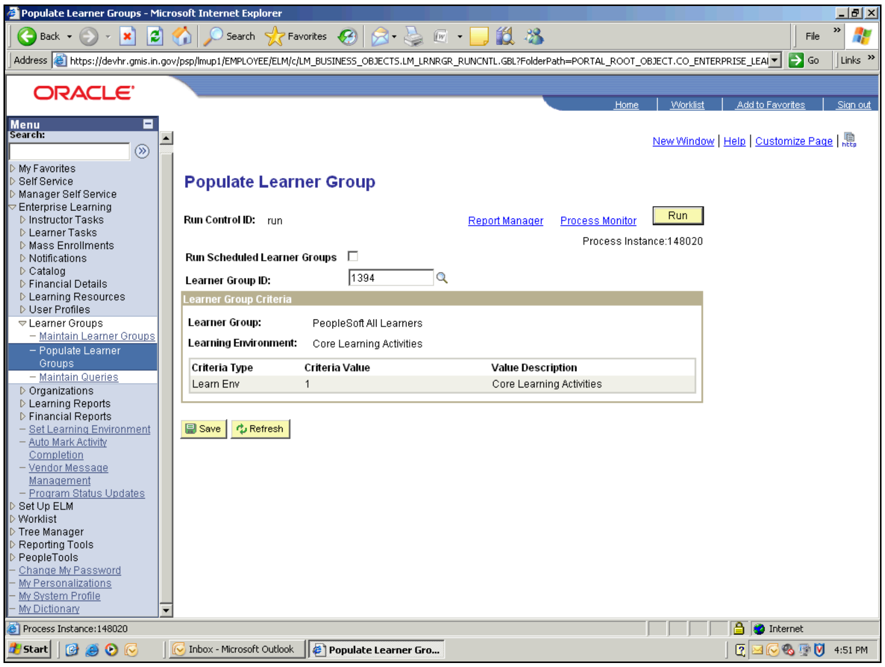
A **Run Control ID** identifies the person who is running a process within the system. The **Run Control ID** is not an assigned value but is created by the person using the system. A **Run Control ID** may be a person's name, PeopleSoft ID number, etc.



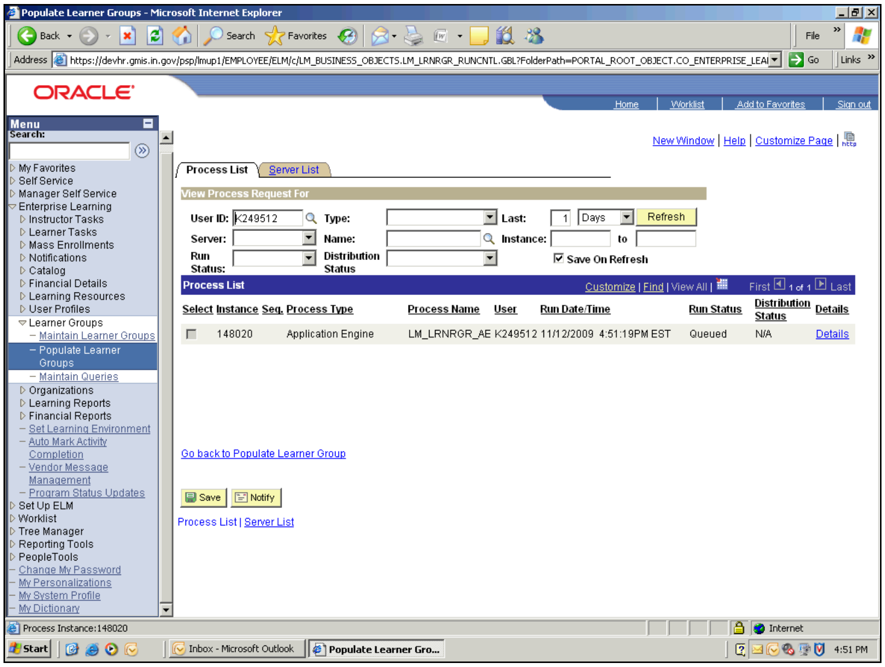
Step	Action
5.	Click in the **Learner Group ID** field to enter the **Learner Group ID** number or use the **Magnifying Glass** button to search for the **Learner Group ID** number. 
6.	Click the **Run** button. 



Step	Action
7.	Click the **OK** button. OK



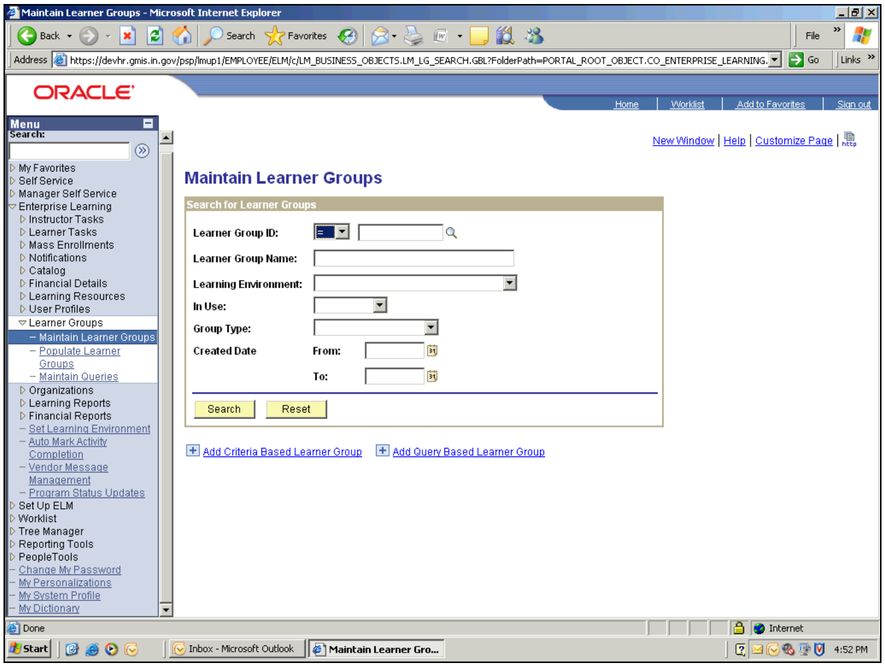
Step	Action
8.	Click the **Process Monitor** link. Process Monitor



Step	Action
9.	Click the **Refresh** button until the **Run Status** column shows **Success** and the **Distribution Status** column shows **Posted**. Click the **Refresh** button. Refresh

	It may be necessary to click the **Refresh** button several times to receive the correct **Run Status** column and **Distribution Status** column statuses.

Step	Action
10.	Click the **Maintain Learner Groups** link on the side **Menu**. Maintain Learner Groups



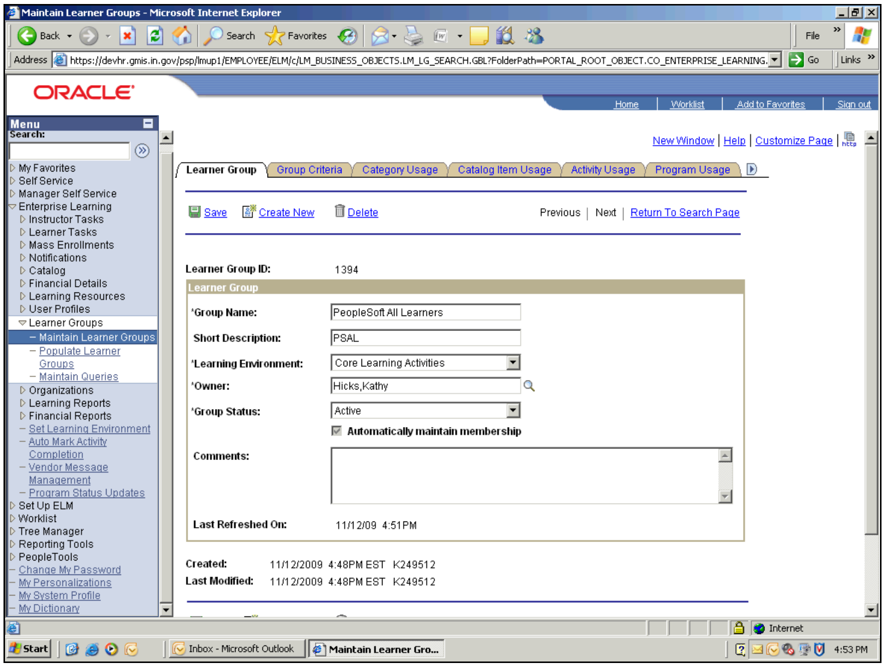
Step	Action
11.	Enter search criteria for the populated learner group.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
12.	Click the **Search** button. Search
13.	Click a learner group in the **Learner Group Results** section. PeopleSoft All Learners

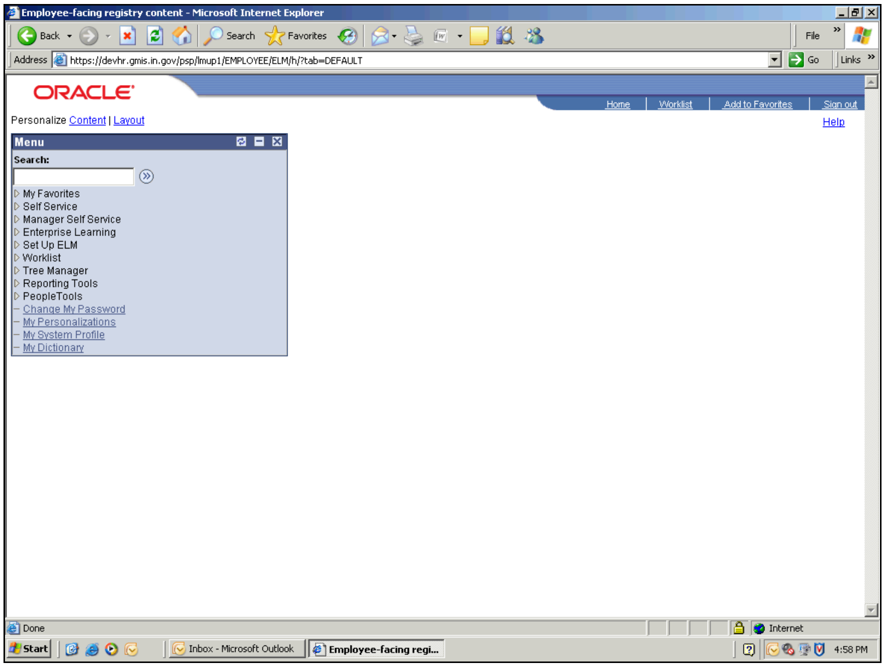


Step	Action
14.	Click the **Group Criteria** tab to locate the learner group members. Group Criteria
15.	Congratulations! You have successfully populated a learner group. **End of Procedure.**

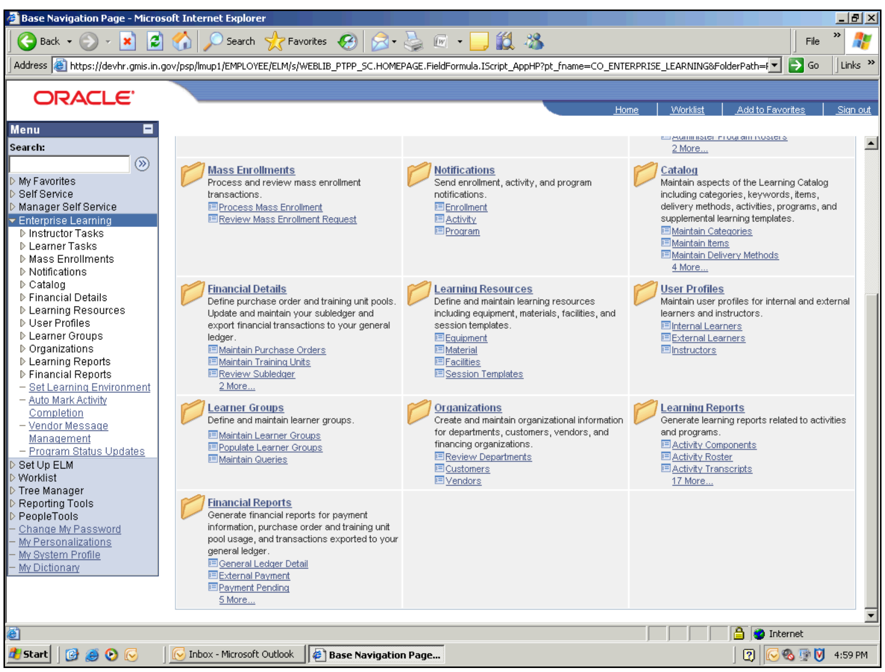
How to Update Learner Group

Updating learner group information may include making a learner group active or inactive or updating learner group criteria and members.

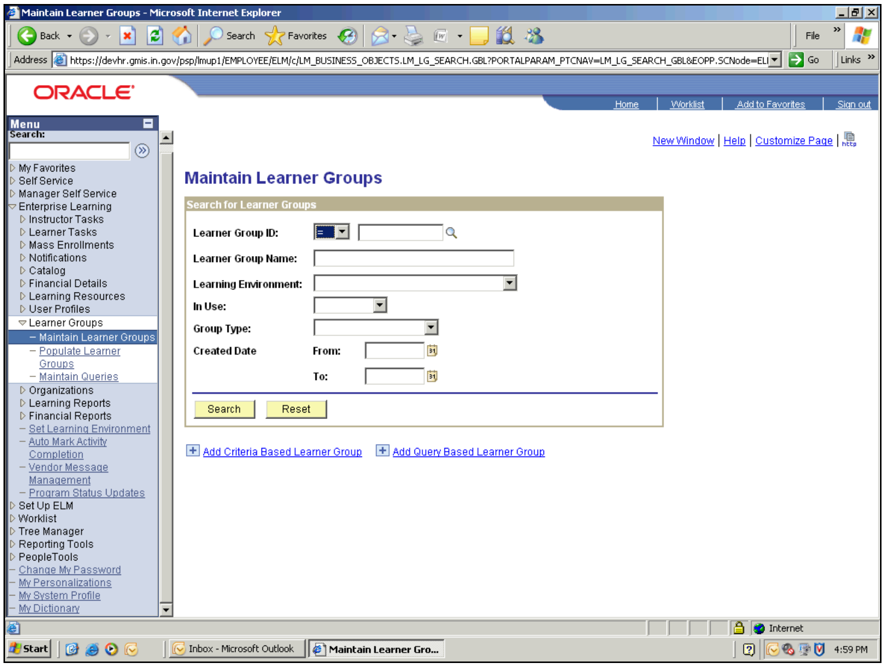
This lesson will teach administrator how to maintain learner group information.



Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



Step	Action
2.	Click the **Learner Groups** link. Learner Groups
3.	Click the **Maintain Learner Groups** link. Maintain Learner Groups

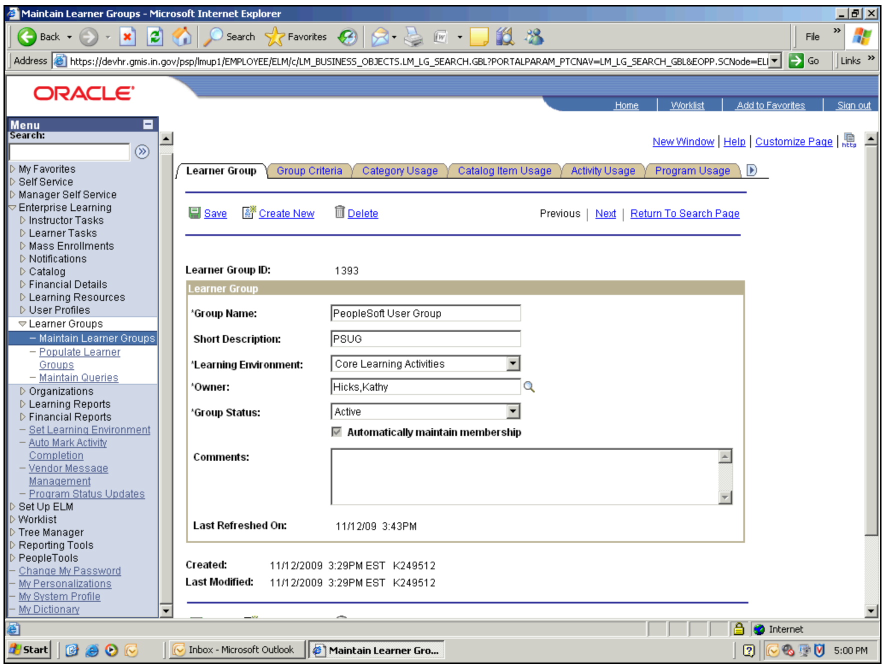


Step	Action
4.	Enter search criteria to locate a learner group.

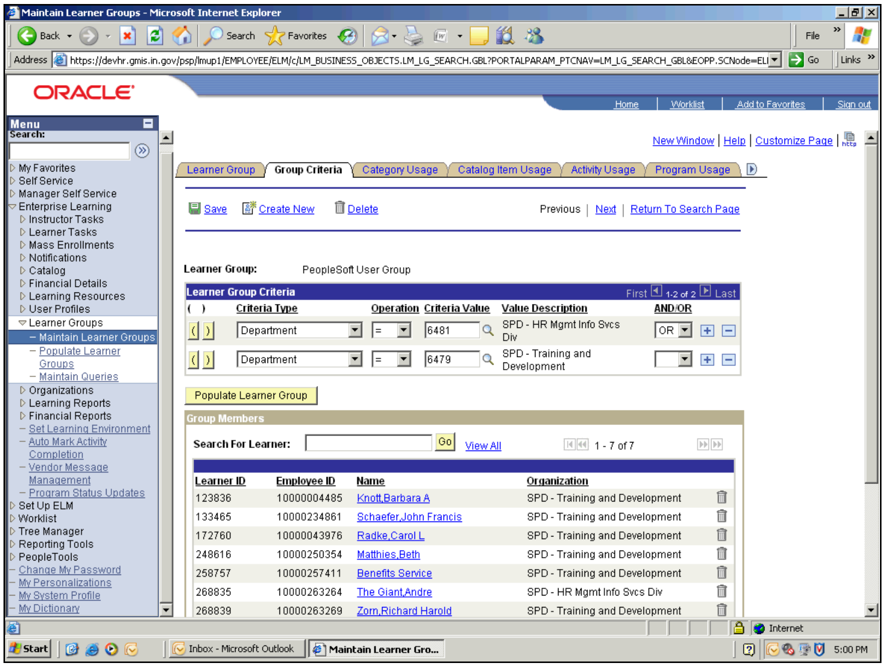
To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

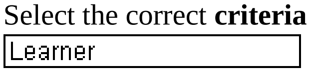
To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
5.	Click the **Search** button. Search
6.	Click the correct **learner group** link in the **Name** column of the **Learner Group Results** section. PeopleSoft User Group



Step	Action
7.	Click the **Group Criteria** tab. Group Criteria



Step	Action
8.	To add additional learner group members to existing members, click the **Add a new row** button. (To remove learner group members, click the **Delete a row** button for the correct row.) Click the **Add a new row** button. 
9.	Click the **Criteria Type** drop-down menu button. 
10.	Select the correct **criteria type** from the list of values. 
11.	Click the **Criteria Value Magnifying Glass** button. 
12.	Enter search criteria for the **criteria value**. 

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the

	calendar button features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
13.	Click the **Look Up** button. Look Up
14.	Select the correct **criteria value** type from the list of values. ISP - Recruit Academy
15.	Confirm the **AND/OR** values are properly set to capture criteria relationships by clicking the **AND/OR** drop-down menu buttons to select and/or make any changes.

	The **AND/OR** values are used to define relationships between the criteria. **<u>For example:</u>** To show a relationship for all members of the State Personnel Department (SPD) who are in the Training and Recruiting divisions, the criteria would look something like: **Row 1:** SPD Business Unit = 00071 **AND** **Row 2:** Training Department = 1015 **OR** **Row 3:** Recruiting Department = 1023

Step	Action
16.	Click the **(button** (left parenthesis) and the) button (right parenthesis) to group criteria results. (

	Use **parenthesis** to define complex relationships between the criteria. How the criterion is grouped can affect the search results. **<u>For example:</u>** If a learner group contains different business units with business unit specific department information, each business unit should be grouped with their own departments using different sets of parenthesis to identify the separate groupings.

💡	To remove a right or left parenthesis, click the **(**button or) button multiple times until it is removed.

Step	Action
17.	Click the **Populate Learner Group** button. Populate Learner Group
18.	Scroll down the page to review **group member** list changes as needed.
19.	Click the **Save** link. Save
20.	Congratulations! You have successfully updated a learner group. **End of Procedure.**

Training Administrator Tasks

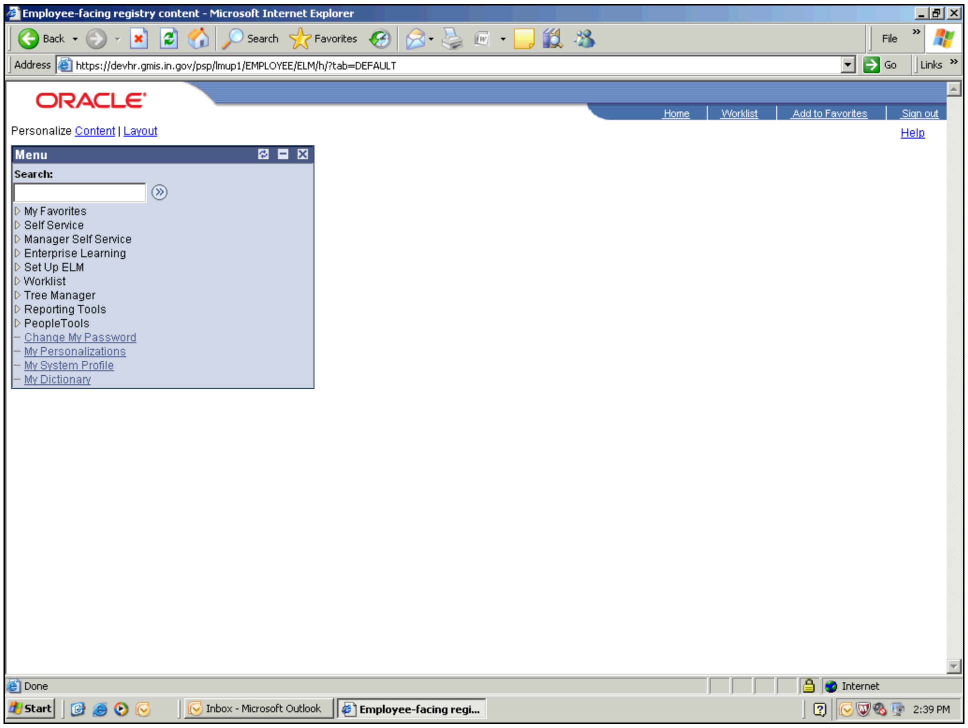
Creating Activities

How to Create/Update Instructor-Led-Training (ILT) Activity

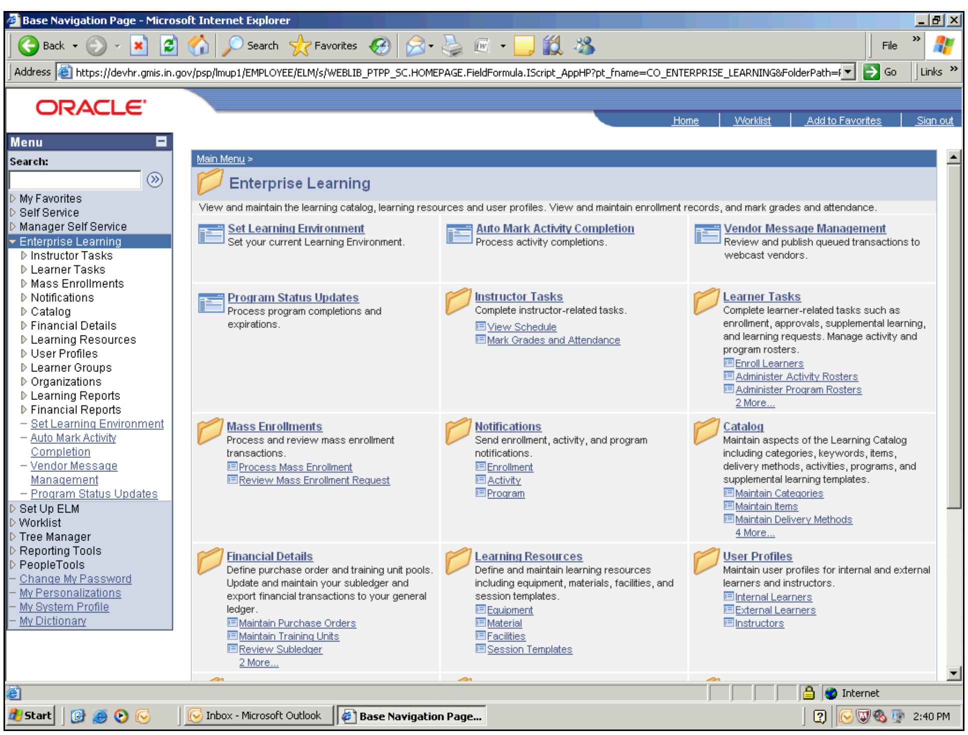
Activities are instances or offerings of a catalog items. If you think of a catalog item as a course, then an activity would be a class or session. Activities are comprised of learning components. Learning components represent how the instructional content of the activity will be delivered to the learners. For example, learning components can be instructor-led and scheduled, or they can be web-based (computer-based) and self-paced. Activities contain at least one learning component, but they could contain as many as needed to reach the learning objectives of the class.

It is recommended the following naming convention is used for activity creation:
Activities (sessions) should begin with the State agency acronym and followed by additional naming convention criteria established by the agency. For example, if the SPD wishes to create an activity (session) for the item (courses) listed above, in addition to the numbering system established and maintained for the items, an extension may be added to identify the activity. An activity naming convention may look like: SPD_00051_120109. The last segment of the activity may identify the date the activity will be offered for the item.

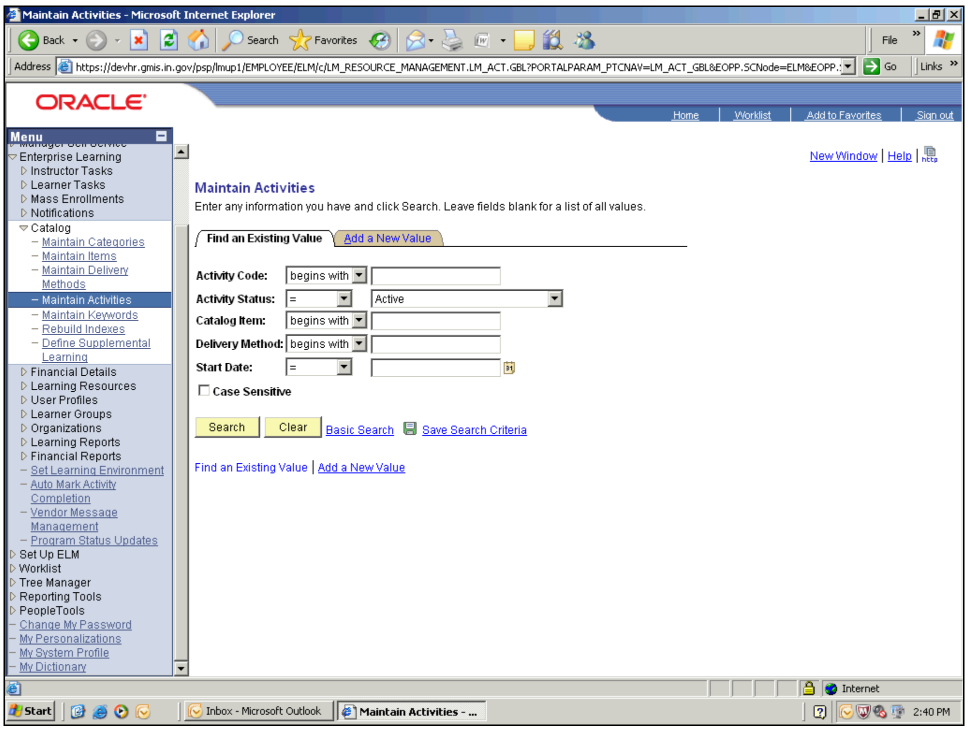
This lesson will teach administrators how to create and/or update an instructor-led catalog activity.



Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



Step	Action
2.	Click the **Catalog** link. Catalog
3.	Click the **Maintain Activities** link. Maintain Activities

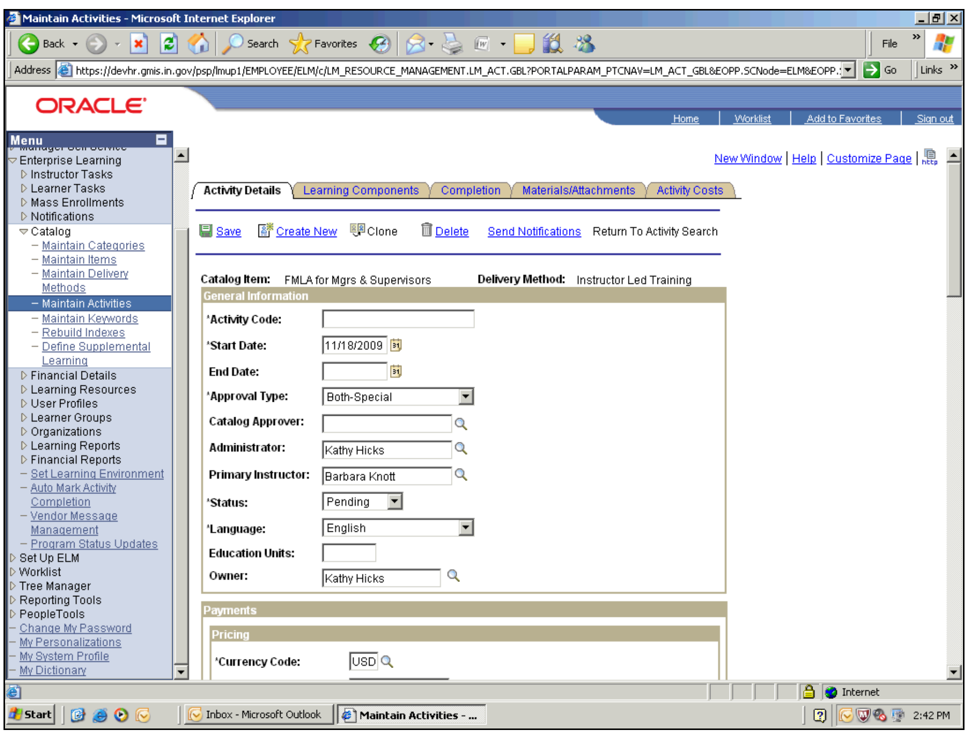


Step	Action
4.	Click the **Add a New Value** tab. Enter **search criteria** to update an existing activity or click the **Add a New Value** tab to create a new activity. Add a New Value
5.	Click the **Delivery Method ID Magnifying Glass** button.
6.	Enter **search criteria** for the correct delivery method ID.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
7.	Click the **Look Up** button. Look Up
8.	Select the correct **Delivery Method Type** from the list of values. FMLA for Mgrs & Supervisors
9.	Click the **Add** button. Add



Step	Action
10.	Click in the **Activity Code** field.

Step	Action
11.	Enter an activity code into the **Activity Code** field. (It is recommended the activity code begin with the State agency acronym followed by additional naming convention criteria established by the agency.)

The activity code appears on the course catalog and during registration and is used by administrators, instructors, and learners to identify specific activities.

Step	Action
12.	Confirm or change the date in the **Start Date** field.

The start date is the first day learners can launch content from activities that contain **web-based (computer-based), survey and test learning components**.

The system uses this date to determine when to send activity reminder if a value is entered in the **Send Reminder** field. The system also uses this value to determine when to send the minimum enrollment notification if a value is entered in the **Min Enroll Days** field to determine the last date a learner can drop the activity without incurring drop charges if a value is entered in the **Last Drop** field.

Step	Action
13.	Enter an end date into the **End Date** field.

The end date is the last day learners can launch content from activities that contain **web-based (computer-based), survey and test learning components**.

The end date is also the last date learners can enroll in the activity, unless the last enrollment date set for the activity comes first. In addition, the activity end date triggers the **Auto Mark Activity Completion** process if the **Auto Mark Completion** checkbox is checked.

Step	Action
14.	Click the **Approval Type** drop-down menu button.
15.	Select the correct **Approval Type** from the list of values. - Select **Both-Specia**l when both the learner's manager/supervisor **AND** the catalog item administrator enrollment approval is required. - Select **None** when no enrollment approval is required and the learner may self-enroll. - Select **Standard** when the learner's manager/supervisor **ONLY** is required to approve enrollment. Both-Special
16.	If catalog administrator approval is needed in addition to manager/supervisor approval, click the **Catalog Approver Magnifying Glass** button to search for a catalog approver.
17.	Enter **search criteria** for the catalog approver.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
18.	Click the **Look Up** button. Look Up
19.	Click an entry in the **Last Name** column. HICKS
20.	Confirm or change the enrollment administrator in the **Administrator** field. Kathy Hicks

Step	Action
21.	Confirm or change the primary instructor for the activity in the **Primary Instructor** field. 
22.	Click the **Status** drop-down menu button. 
23.	Select the correct status from the list of values. 

Set the status of the activity. The status of the activity impacts enrollment in the activity. Values include:

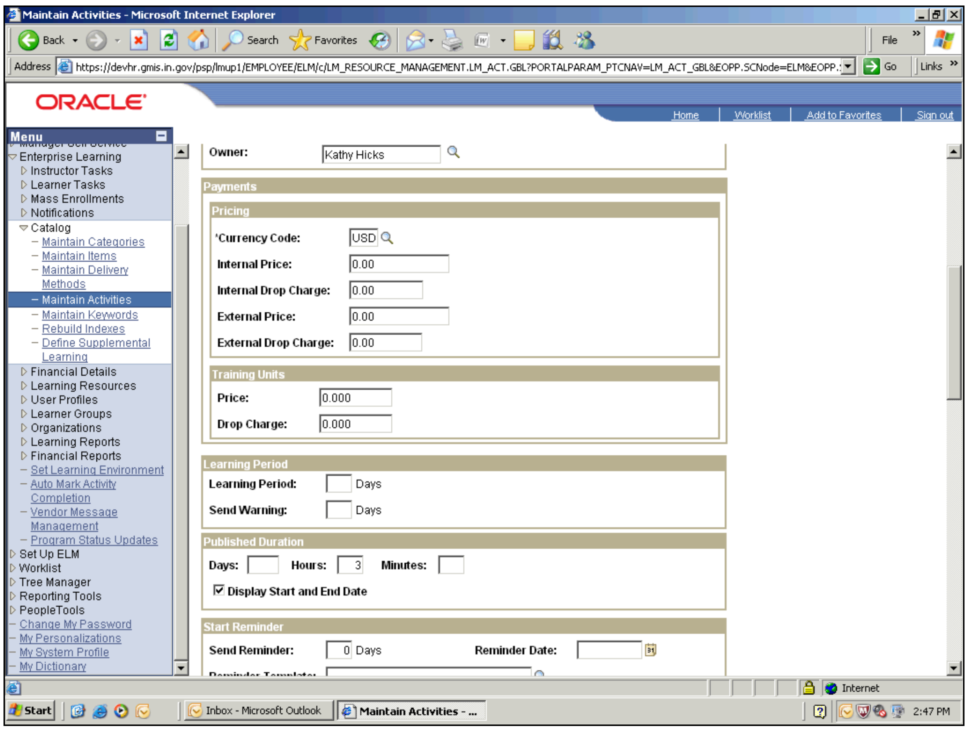
- **Active** activities appear in the learning catalog and learners can self-enroll into the activity.
- **Closed** activities are closed to appear in the learning catalog for learners in self-service but learners cannot self-enroll. Whenever an activity is closed, only administrators can enroll learners into that activity.
- **Concluded** activities do not appear in the learning catalog for learners to view or enroll in through self-service. Concluded activities are available to administrators and they can enroll learners into this activity and mark completions statuses manually.
- **Inactive** activities do not appear in the learning catalog for learners to view or enroll in through self-service. When an activity becomes inactive, all enrollments (except for those that are completed or incomplete) are automatically dropped, and an email notification is sent to al the learners whose enrollments are dropped.
- **Pending** is the default for activities when they are first created. Pending activities can be viewed and managed by administrators but cannot be viewed or enrolled in by learners through self-service.

Activities with *Active*, *Closed*, or *Concluded* statuses without learning components cannot be saved.

Step	Action
24.	Enter the number of education units earned for the course in the **Education Units** field, if applicable. 
25.	Confirm or change the activity owner in the **Owner** field. 

The owner is the person who is notified when the minimum enrollment is not met for an activity. By default, the system displays the name of the administrator who creates the activity.

The **Owner** field works in conjunction with the **Min Enrollment** field and the **Min Enroll Days** field.



Step	Action
26.	Enter any pricing or training unit's information into the **Payments** section.

The **Payments** section contains **pricing** and **training unit** information associated with the delivery method of an item. Selections made in either the **Pricing** section or the **Training Units** section can be overridden for adjustments at the activity level as needed.

***Pricing* fields include:**

Internal Price - The price to charge internal learners to enroll into item activities. Internal learners are learners who are tracked in PeopleSoft HR as employees, contingent (contract) workers, or persons of interest (board members, external instructors, etc.)

Internal Drop Charge - The amount to charge internal learners for dropping activities after the **drop period**.

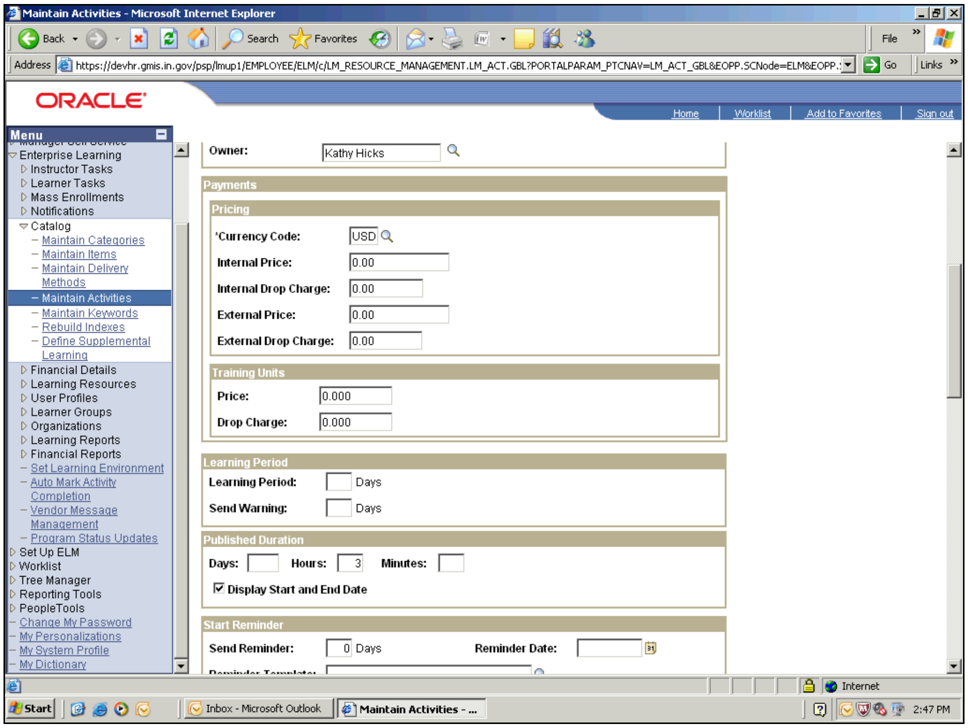
External Price - Not used.
External Drop Charge - Not used.

***Training Units* fields include:**
Not used - training units only apply to external learners.

Step	Action
27.	Enter any learning period information into the **Learning Period** section.

The **Learning Period** fields are used most often for activities with **web-based, test, survey, or assignment delivery method learning components only**. The selections made here may be overridden at the activity level.

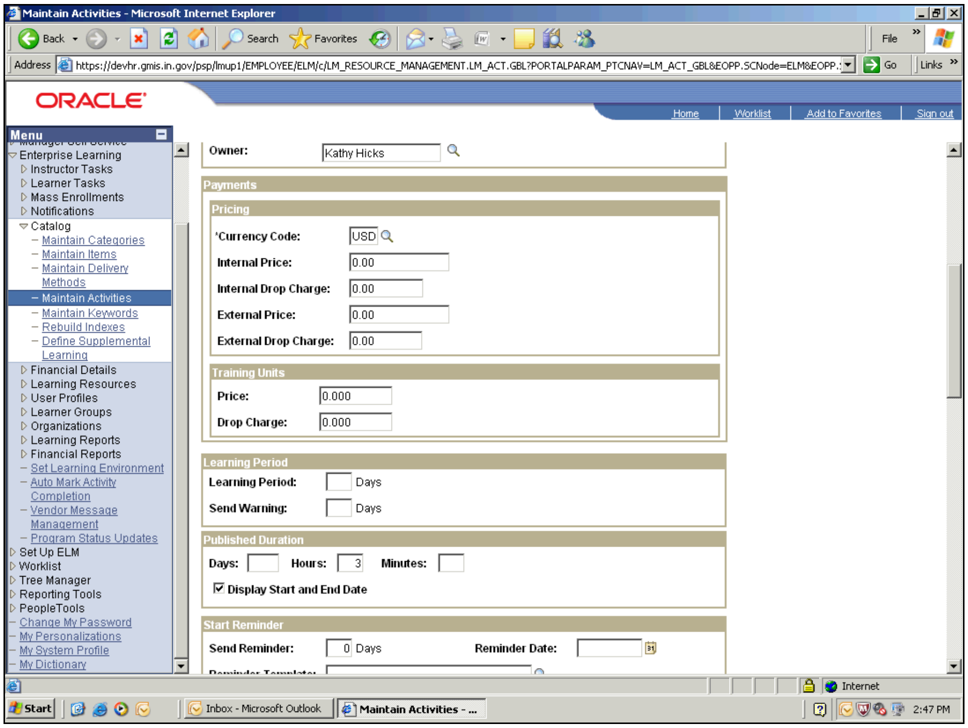
***Learning Period* fields include:**
Learning Period - The number of days after the enrollment date that learners must complete the activity. If the learner has not received a completion status of either '**Completed**' or '**Not Completed**' for an activity, at the end of the learning period the **Auto Mark Activity Completion** process will run changing the learner's status accordingly.
Send Warning - The number of days before the end of the learning period that the system sends an email notifying the learner that the learning period is about to expire.



Step	Action
28.	Enter any published duration information into the **Published Duration** section.

The **Published Duration** sections uses the **Days**, **Hours**, and **Minutes** fields to estimate how long activities should take using the identified delivery method. The values entered here become default values within the **Activity Details** page.

Duration is not related to learning period. Duration is the amount of time the learning activity should actually take to complete, whereas the learning period is the amount of time the learner has to complete the activity. Most often the learning period will be longer than the duration.

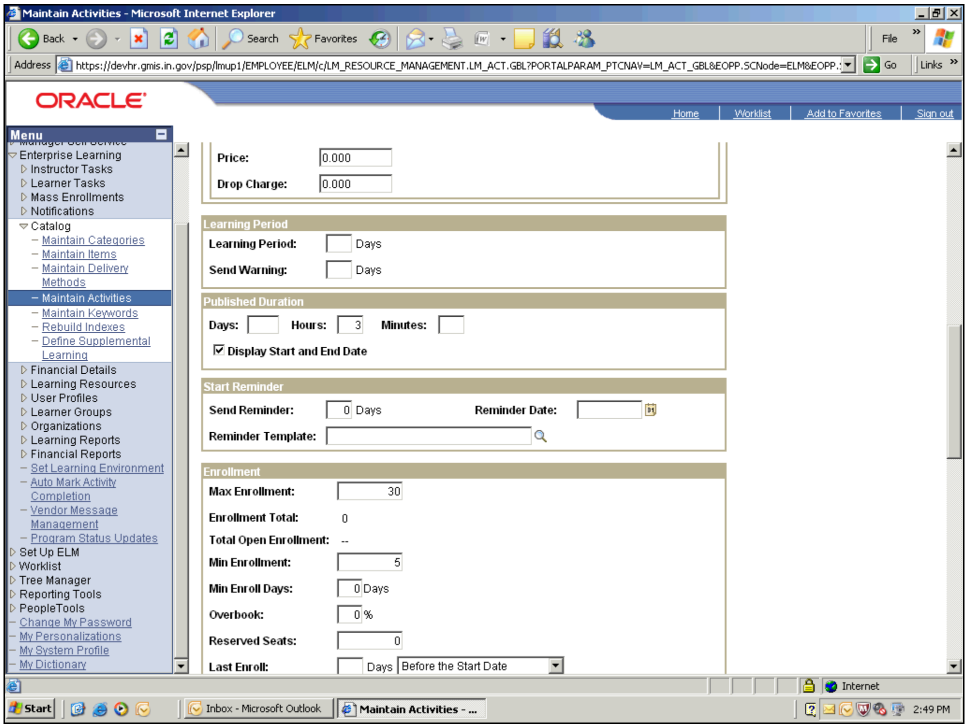


Step	Action
29.	Confirm or uncheck the **Display Start and End Date** checkbox as required. 

Check the **Display Start and End Date** checkbox to display the activity start and end date to learners. **The default for this field is checked.**

Clear this field to display **"--"** to learners in enrollment notifications and in the activity header on the **Activity Detail** and progress pages. Learners will also see **"Anytime"** in the **Start Date** column on the **Activity Name** page.

Uncheck this field if displaying a start date would be confusing to learners, such as for a self-paced activity.



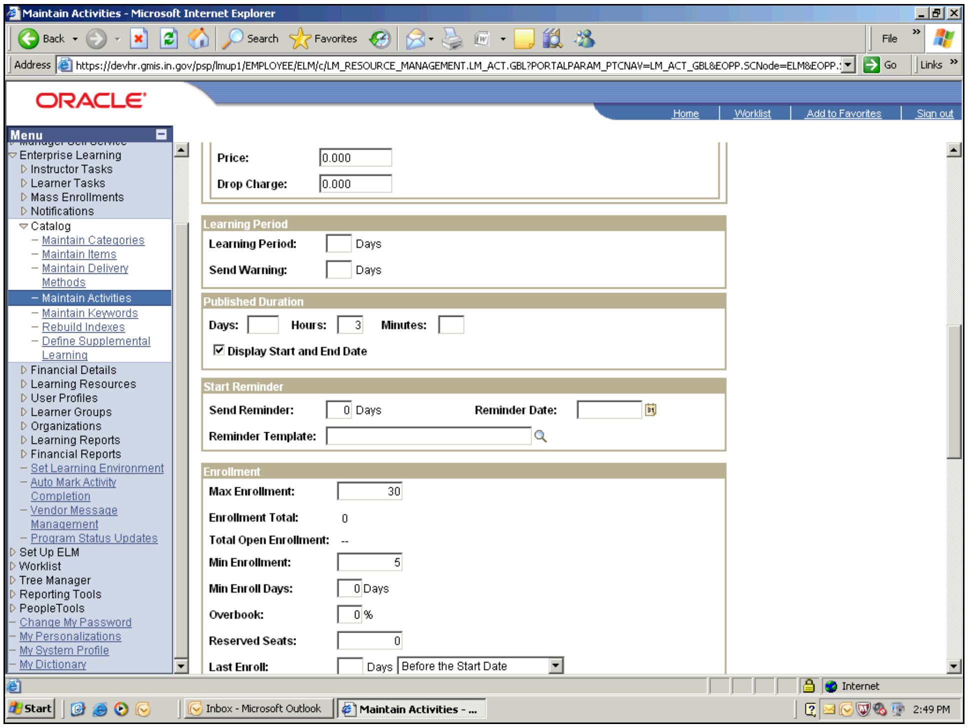
Step	Action
30.	Enter any activity start reminder information into the **Start Reminder** section. minder:

Start Reminder **fields include:**

Send Reminder - The number of days from the activity start date an email is sent to learners and instructors reminding them about the start of the activity. Alternatively, a particular date can be specified for the reminder to be issued in the **Reminder Date** field.

Reminder Date - The date an email is sent to learners and instructors reminding them about the start of an activity. Alternatively, the number of days before the start date to send a reminder can be entered into the **Send Reminder** field.

Reminder Template - Select an email template to deliver the default reminder message.



Step	Action
31.	Enter any activity enrollment information into the **Enrollment** section. 30

***Enrollment* fields include:**

Max Enrollment (maximum enrollment) - The maximum number of learners that can enroll into an activity. When this number has been reached, the system closes the activity to further enrollment unless overbooking and/or waitlisting is permitted. If overbooking and/or waitlisting is permitted, learners will continue to be enrolled up to the overbook percentage. This field is populated by default from the ***Delivery Method*** page.

Enrollment Total - Displays the number of learners who have successfully enrolled in the activity. The total reduces if enrollments are cancelled or postponed. The enrollment process keeps this field updated automatically.

Total Open Enrollment - Displays the total amount of seats that are currently available for enrollment. The enrollment process keeps this field updated automatically.

Min Enrollment (minimum enrollment) - The minimum number of learners that should enroll in the activity for the activity to proceed. This field is populated by default from the ***Delivery Method*** page.

Min Enroll Days (minimum enrollment days) - The number of days before the activity start date for the minimum enrollment notification is sent to the enrollment administrator and activity owner to alert them the minimum enrollment has not been reached. This notification gives the administrator and owner an opportunity to cancel the activity due to low enrollment.

Overbook - The percentage above the maximum enrollment value that will allow enrollment. The overbook value, multiplied by the maximum enrollment number, is the total number of enrollments that the system accepts before the system assigns the waitlist status to a learner attempting to enroll into the activity.

Reserved Seats - The number of seats available in reserve. Only the activity administrator can enroll learners into reserved seats. Use this field to reserve seats for groups of learners without naming specific learners. The number of reserved seats can be revised at any time.

Last Enroll (last enrollment) - The number of days ***Before the Start Date*** or ***After the Start Date*** drop-down menu options indicating the last day enrollment is permitted. Days can be set in this field or a specific date may be used in the ***Last Enroll Date*** (last enrollment date) field. This field is useful to close enrollments to accommodate the ordering of materials for an activity, for example.

Last Enroll Date (last enrollment date) - The date representing the last day enrollment into the activity is permitted. Alternatively, the number of day before or after the activity start date learners can enroll in the ***Last Enroll*** field or the last enroll date can be set at the activity start date by selecting the ***Last Enroll Date = Start Date*** checkbox.

Last Enroll Date = Start Date - Check the checkbox to have the last day learners can enroll in the activity to equal the activity start date. Alternatively, a last enrollment date may be entered in the ***Last Enroll Date*** field or the number of days before or after an activity start date learners may enroll can be specified in the ***Last Enroll*** field.

Enforce Enrollment Limit - Check the checkbox to have the system prevent learners from enrolling in this activity after the maximum enrollment number is reached. To have the system generate a waiting list for this activity, you must select this checkbox. Uncheck the checkbox if there is no maximum enrollment limit.

Restrict to Programs - Not used.

Step	Action
32.	Enter any activity waitlist information into the **Waitlist** section. 

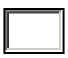
***Waitlist* fields include:**

Enable Waitlist - Check this checkbox to have the system accept wait-listed learners' once maximum enrollment is reached. If overbooking is permitted, the system does not waitlist learners until the overbook percentage is reached.

Waitlist Capacity - The maximum number of learners the system can put on the waitlist. The system populates this field by default from the ***Delivery Method*** page.

Waitlist Total - Displays the number of learners on the activity waitlist. The enrollment process automatically increases or decreases this number as learners are added to or removed from the waitlist.

Waitlist Threshold - The number of learners on the waitlist to send a notification to the administrator.

Step	Action
33.	Enter any drop activity information into the **Drop Activity** section. 

***Drop Activity* fields include:**

Last Drop - The number of days ***Before the Start Date*** or ***After the Enrollment Date*** drop-down menu options the learner can drop the activity. Alternatively, a specific date may be used in the ***Last Drop Date*** field.

Last Drop Date - The date until a learner can drop the activity without paying a drop fee.

Last Drop Date = Start Date - Check this checkbox if the last day learners can drop the activity without having to pay a drop fee to equal the activity start date.

Step	Action
34.	Enter any grades and attendance information into the **Grades and Attendance** section. 

***Grades and Attendance* fields include:**

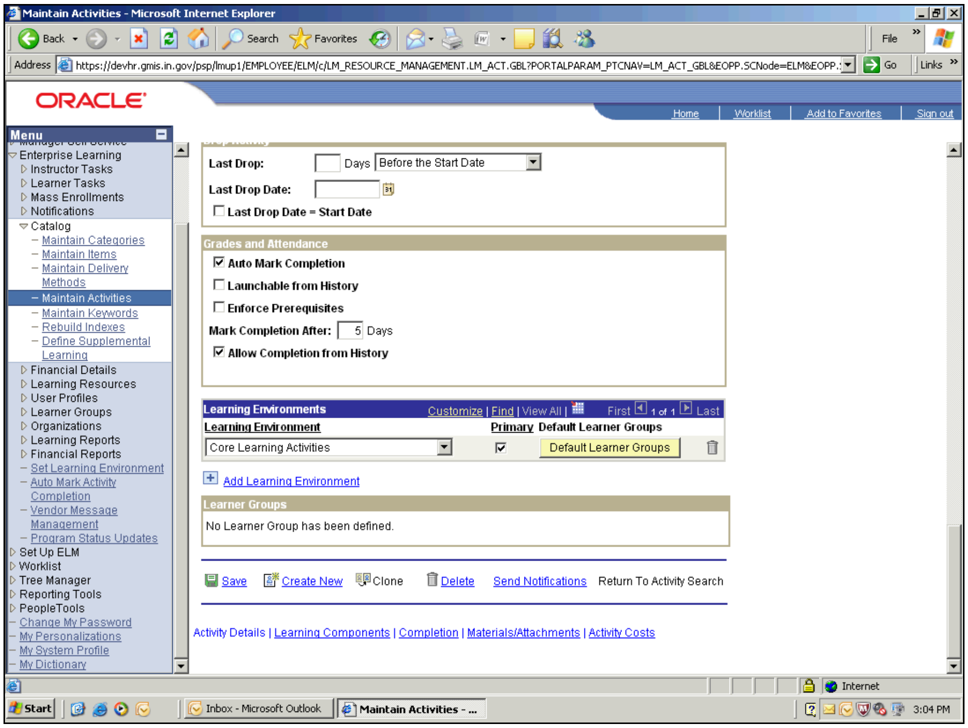
Auto Mark Completion - Check this checkbox to have the system automatically update completion statuses at the completion of an activity. The rules for marking attendance depend upon the learning components within the activity. The system populates this field by default from the ***Delivery Method*** page.

Launchable from History - Check this checkbox to have the links associated with **web-based, test, or survey learning components** to be launchable from the learner's ***All Learning*** page. If checked, the learner will always be able to launch the content even after the activity achieves a completion status of '**Completed**' or '**Not Completed**'. The system populates this field by default from the ***Delivery Method*** page. **This checkbox must be checked if the *Allow Completion from History* checkbox is checked.**

Enforce Prerequisites - Check this checkbox to have the enrollment process to enforce required activity prerequisites. If the checkbox is not checked, the activities requiring prerequisites will not be enforced during enrollment. Administrator can still override prerequisites for individual learners even if the checkbox is checked but Managers cannot. Managers may use the ***Supplemental Learning*** page to give learners waivers of catalog items.

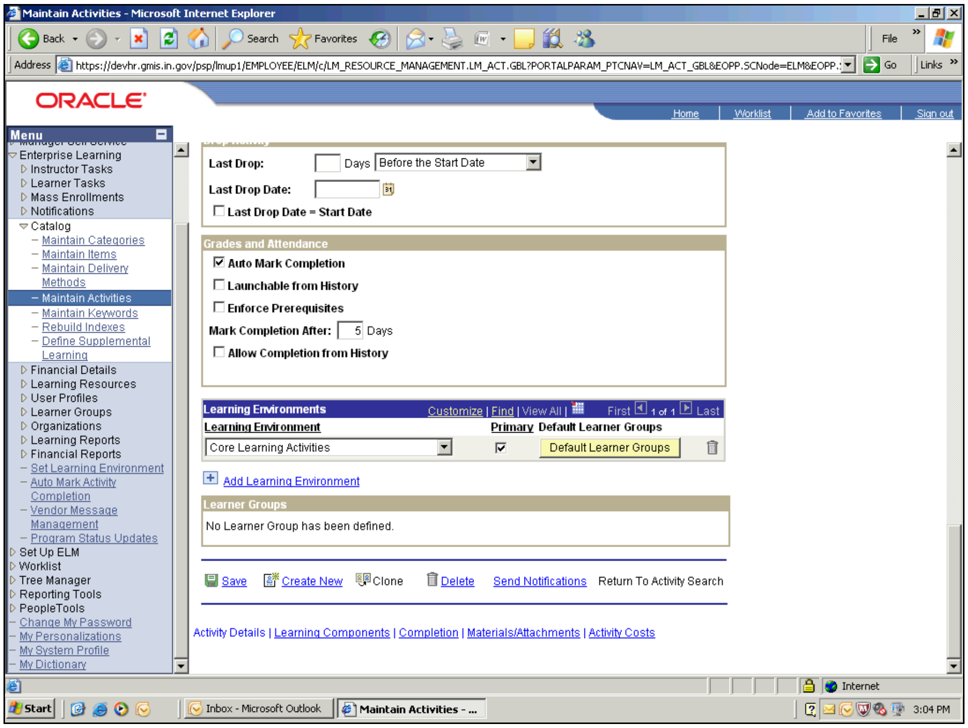
Mark Completion After - If the ***Auto Mark Completion*** is checked, enter the number of days after completion of the activity that the system automatically updates the attendance and passing statuses. If the value is *0*, the system updates the attendance records on the completion date. The system populates this field by default from the ***Delivery Method*** page.

Allow Completion from History - Check this checkbox to have learners be able to complete learning activities with **web-based, test, or survey learning components** to be launchable from the learner's ***All Learning*** page. This allows a learner to review or test an item as many times as needed. If the ***Launchable from History*** checkbox is checked and this checkbox is not checked, then learners can launch the content from the ***All Learning*** page **but their progress will not be updated and no changes will be made to the activity's completion or passing status**.



Step	Action
35.	Confirm or change any learning environment information into the **Learning Environments** section.

An activity must be associated with at least one learning environment. The system displays the administrator's current learning environment as the default. If more than one learning environment exists and a learning environment is removed, the primary learning environment will automatically default to a remaining learning environment. The primary learning environment can be changed at any time.

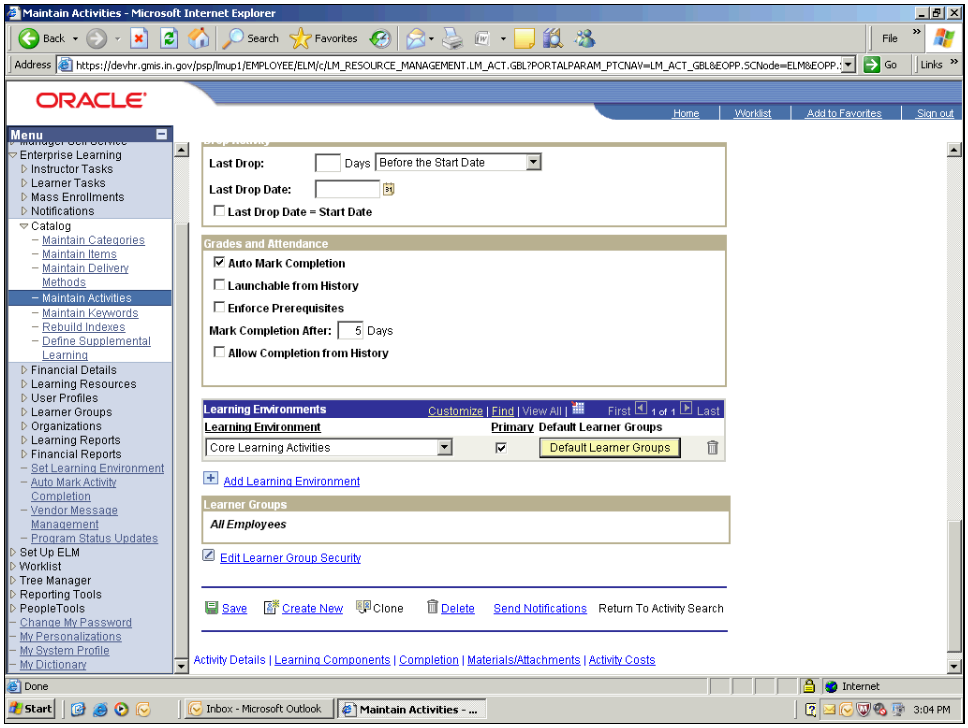


Step	Action
36.	Click the **Default Learner Groups** button. Default Learner Groups

A **Learner Group** identifies groups of learners who will complete training together. Learner groups can be created by Business Unit, individual Learner ID, Job Codes, etc.

One of the primary functions of learner groups is to control access to the learning catalog. For a user to access a particular activity (session) in the catalog, the user must belong to a learner group that is assigned to the **activity** (session), the **catalog item** (course), and the **category** (State agency) that's associated with the catalog item.

Learner group data is defined by associating a Learner Group with a **Learning Environment and owner** (administrator). Learning environments control which parts of the catalog an administrator can view and update, as well as the default values and options that are associated with the objects (such as categories, catalog items, activities, and programs). The learning environment also enables administrators to access the instructors and resources that are available for assignment.



Step	Action
37.	Confirm the learner group(s) populated correctly. To add additional learner groups, click the **Edit Learner Group Security** link. Click the object.

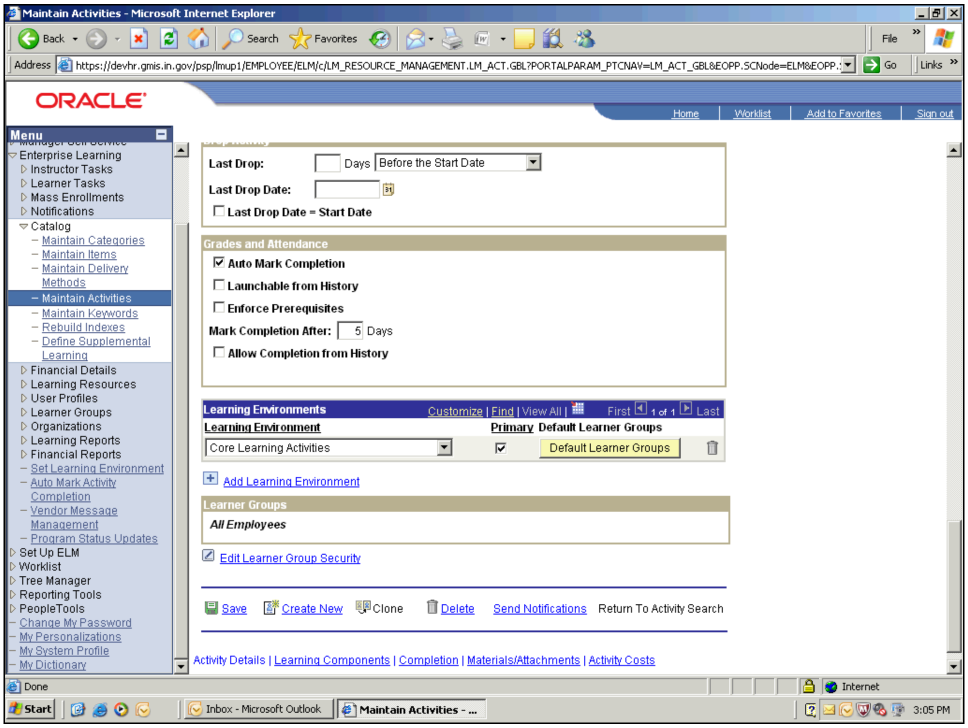
Learner group security specifies which learner groups can access activities and programs within a category when browsing or searching the catalog.

If a learner group is not assigned, the related activities will not appear in the catalog.

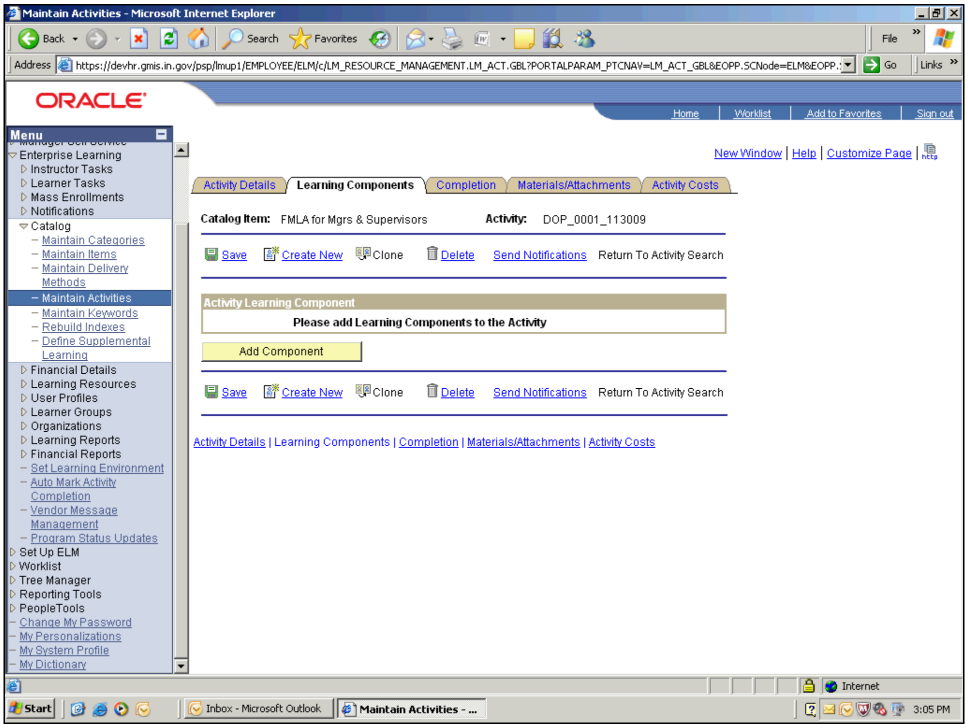
When entering learner group security **for multiple learner groups**, the **Relationship** drop-down menu field list of values need to be set correctly to specify how one learner group is related to others in the list when used to determine whether or not a person has access. Values include:

- Select **And** if a learner must be a member of both this learner group and the next in the list.
- Select **Or** if a learner must be in this learner group or the next in the list.
- Select **End** as a placeholder for the last learner group is the list.

Important! The system ignores any learner groups that are listed after *End*.



Step	Action
38.	Click the **Learning Components** link. Learning Components

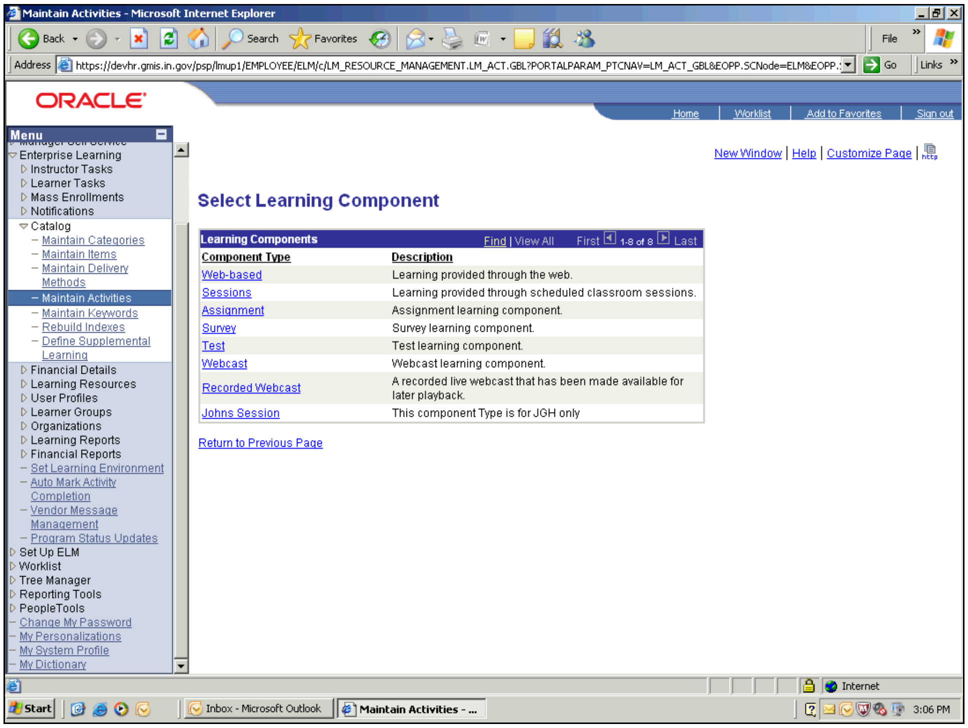


Step	Action
39.	Click the **Add Component** button. 

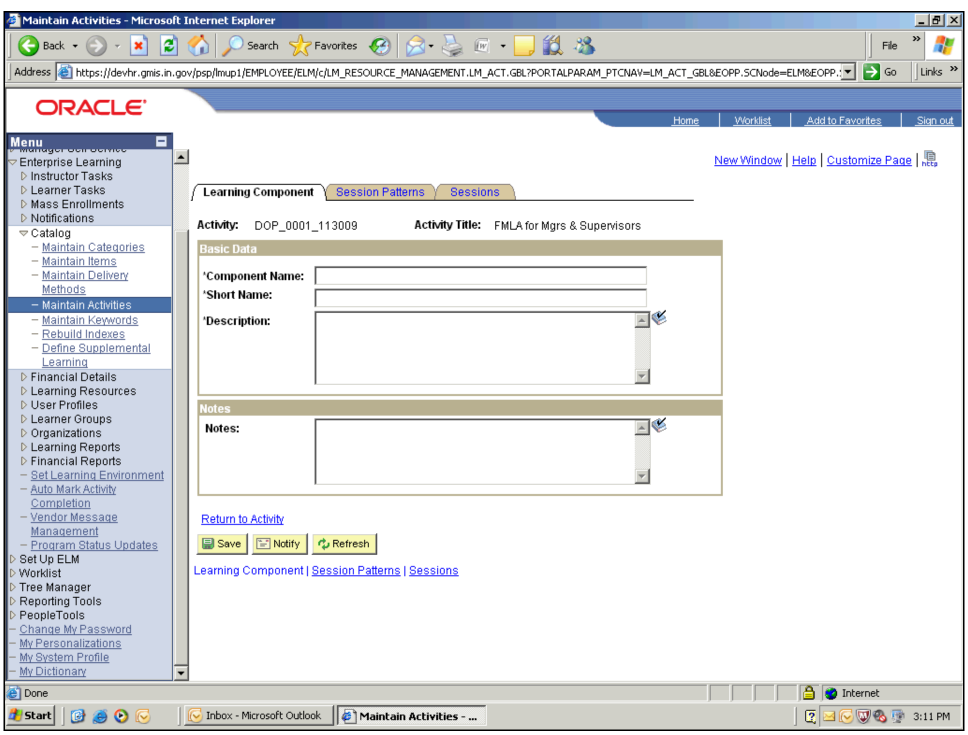
The **Add Component** button allows a learning component to be added to an activity.

Clicking the **Edit** link will allow updates to existing learning components.

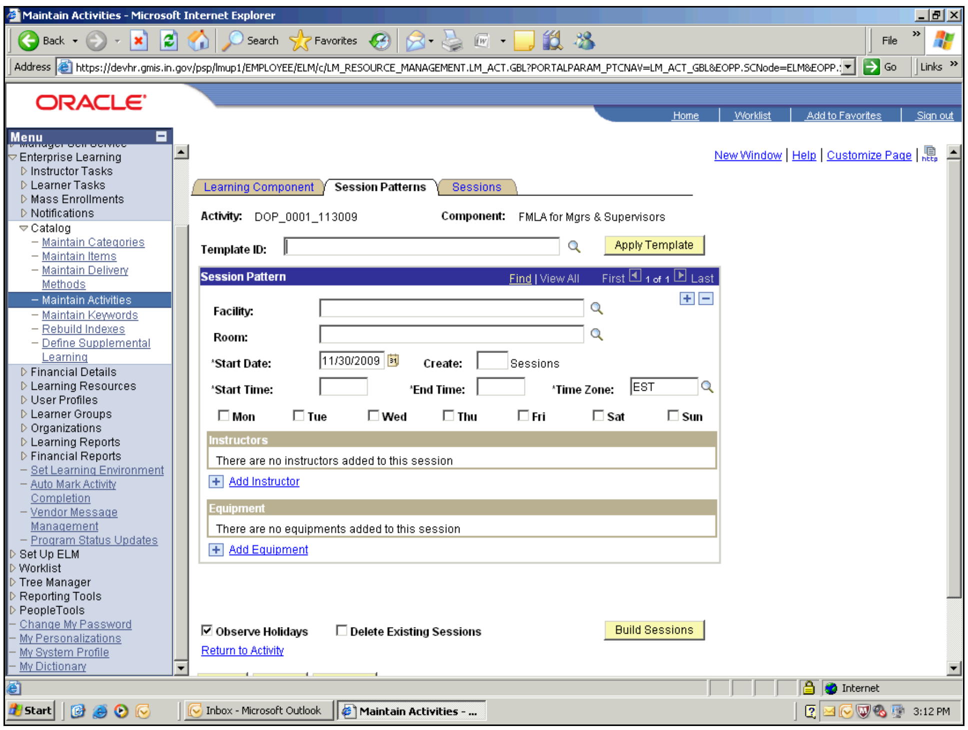
Every activity must have at least one learning component to be marked as an *Active* activity.



Step	Action
40.	Select a component type from the list of values in the **Component Type** column. Sessions



Step	Action
41.	Enter the activity title into the **Component Name** field.
42.	Enter an activity title abbreviation into the **Short Name** field.
43.	Enter the activity description into the **Description** field.
44.	Enter any activity notes into the **Notes** field.
45.	Click the **Session Patterns** tab. Session Patterns

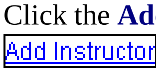


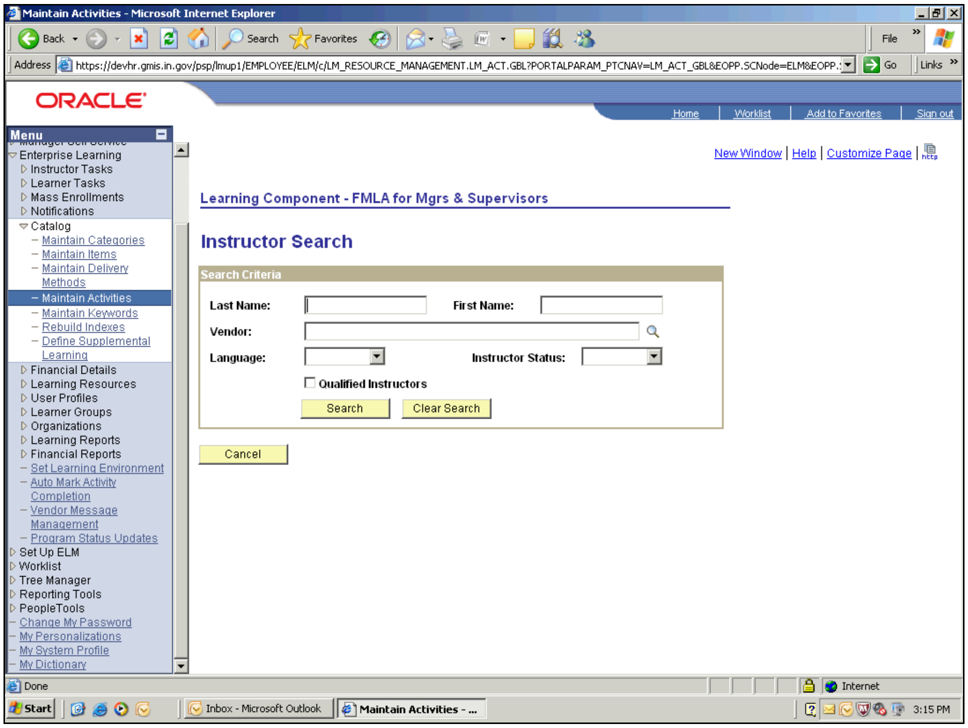
Step	Action
46.	Click the **Facility Magnifying Glass** button.
47.	Search for or select the training facility from the list of values in the **Description** column. Department of Personnel
48.	If the facility has more than one training room, click the **Room Magnifying Glass** button to select the correct room from the list of values.
49.	Enter the session start date into the **Start Date** field. 11/30/2009

> One activity may have several sessions. **The start date of the session may not necessarily be the start date of the activity.** Multiple sessions within an activity are assigned individual session ID numbers to assist with reporting needs.

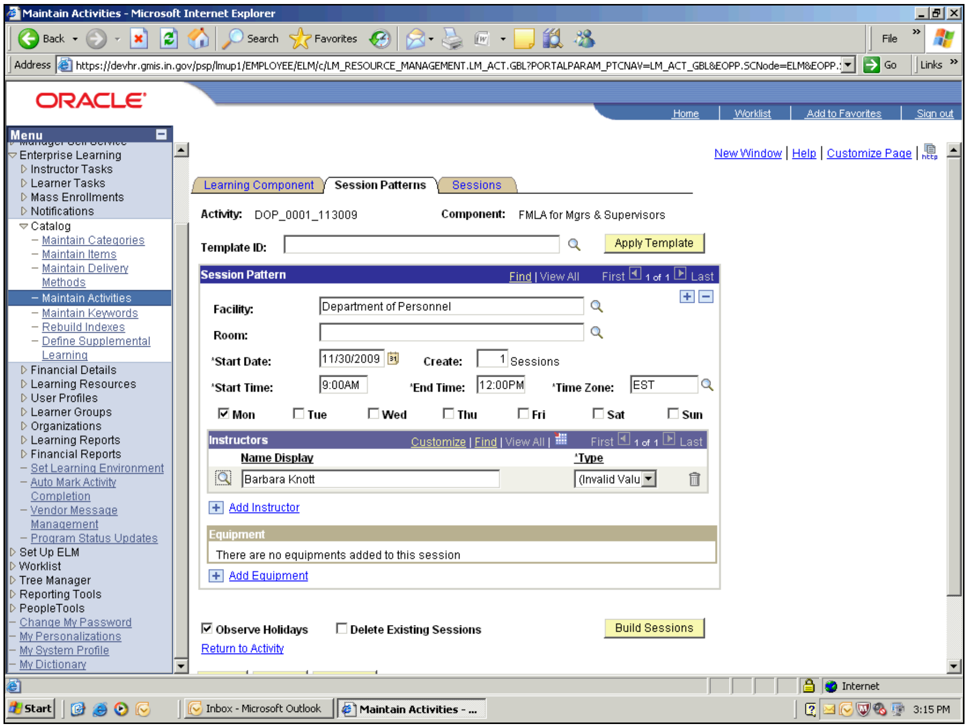
Step	Action
50.	Enter the number of sessions to be created into the **Create** field.

> **The system will not create any sessions if a number is not entered into the session Create field.**
>
> The number of sessions and checking the checkboxes for the correct days of the week helps the system identify repeating session patterns. The session pattern tells the system on which days it can schedule sessions and when to stop repeating the pattern. For example:
>
> If the number of sessions entered is 10 and the class would repeat on Tuesday and Wednesday (determined by checking the checkboxes), the class would repeat every Tuesday and Wednesday for five weeks.

Step	Action
51.	Enter the start time of the session(s) into the **Start Time** field.
52.	Enter the end time of the session(s) into the **End Time** field.
53.	Confirm or change the time zone in the **Time Zone** field. 
54.	Check the correct checkbox (es) day(s) for the session(s) to be held. 
55.	Click the **Add Instructor** link. 
56.	Click the **Instructors** section **Name Display Magnifying Glass** button. 



Step	Action
57.	Enter **search criteria** for the instructor.
58.	Click the **Search** button. Search
59.	Select the correct instructor from the list of values in the **Name Display** column. Barbara Knott



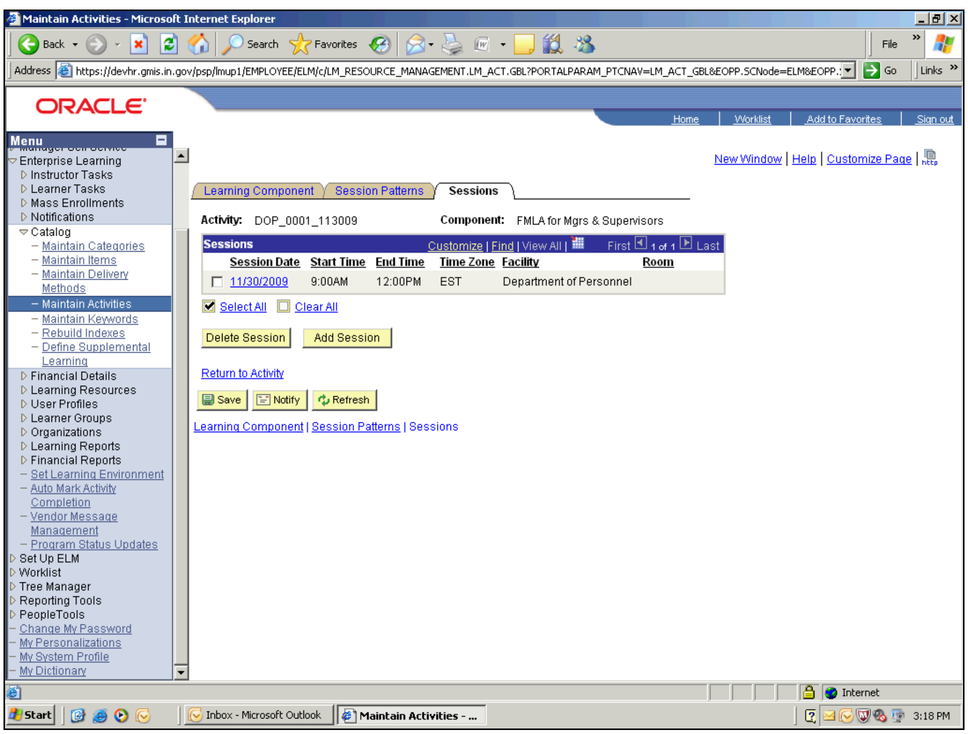
Step	Action
60.	Click the **Type** drop-down menu button. 
61.	Select the correct instructor **Type** from the list of values. - **Coach** for a training collaborator but not training delivery. - **External** for a vendor training delivery. - **Facilitator** for training communications or problem-solving but not training delivery. - **Mentor** for training counseling or guidance but not training delivery. - **Primary** for internal instructor training delivery. Primary
62.	Click the **Add Instructor** link to add additional instructors and types. Add Instructor
63.	Click the **Add Equipment** link to add any needed equipment for the session. Add Equipment
64.	Check the **Observe Holidays** checkbox to observe the holiday schedule linked to the selected facility for the session. ☑ Observe Holidays
65.	Check the **Delete Existing Sessions** checkbox, if desired. ☐ Delete Existing Sessions

Check the **Delete Existing Sessions** checkbox to delete any previously built sessions.

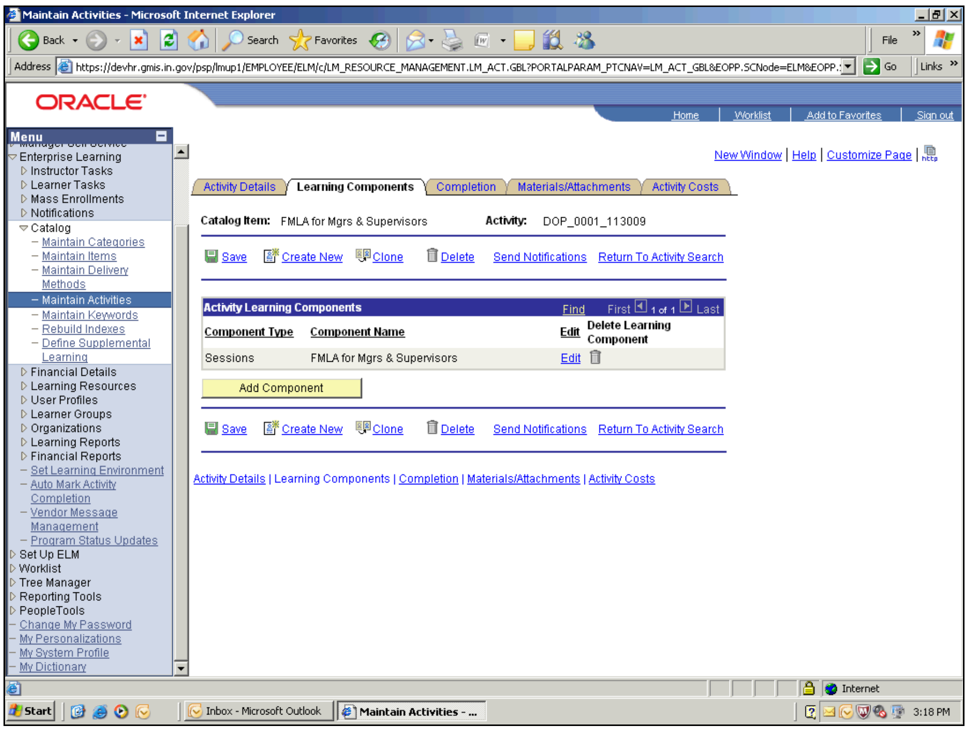
	Leaving the checkbox unchecked allows the system to add any new sessions to be built to existing sessions.

Step	Action
66.	Click the **Build Sessions** button. 

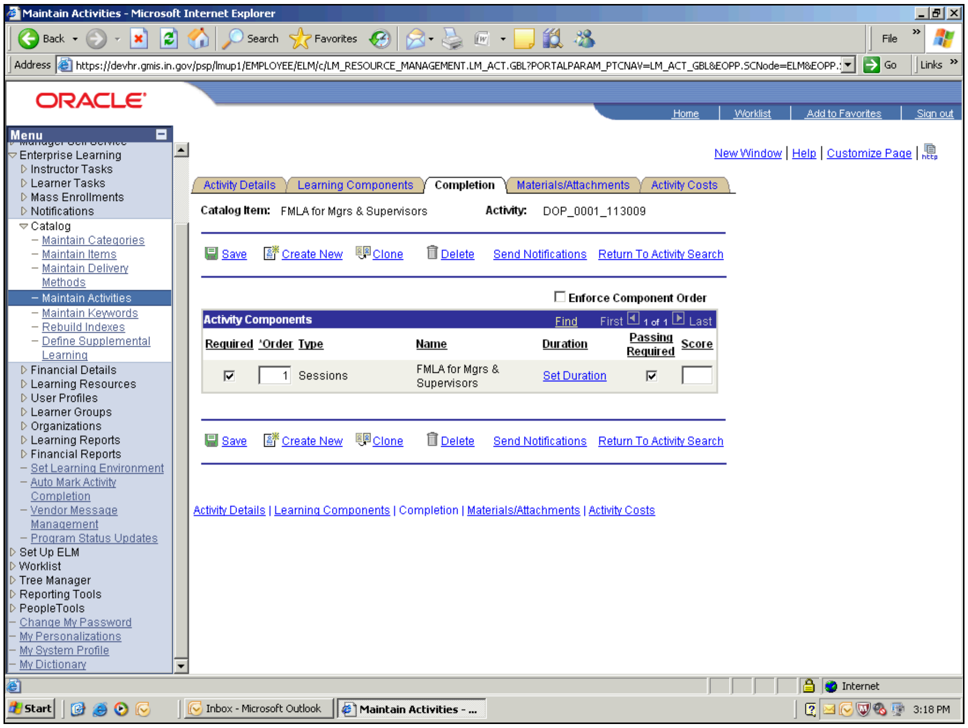
	Activity session scheduling information will not appear in the learning catalog unless the Build Sessions and Add Session buttons are clicked. While the **activity** may be viewed while searching and browsing the catalog, **scheduled sessions will not appear** upon clicking the activity **View Details** link, then the **Schedule** link. When scheduled sessions do not appear upon clicking the **Schedule** link, learners receive a default message of, "There are no scheduled sessions for this activity" which may be confusing for learners wishing to enroll into an activity session. **The system does not allow sessions falling outside of the activity start and end dates to be built.**



Step	Action
67.	If additional sessions are needed for the same date and time and/or sessions need to be removed, c To add the checked session(s), click the **Add Session** button. To remove checked session(s), click the **Delete Session** button. Delete Session
68.	Click the **Return to Activity** link. Return to Activity

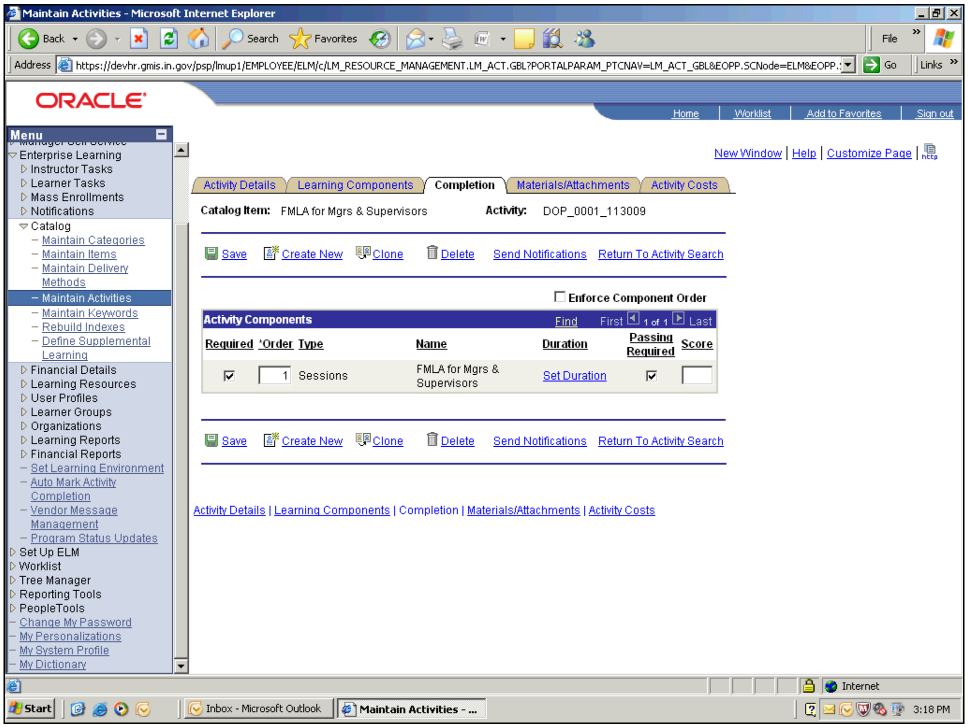


Step	Action
69.	Click the **Completion** tab. Completion



Step	Action
70.	Check the **Enforce Component Order** checkbox, if desired. 

Check this checkbox to force learners to complete learning components in a set order as defined by the **Order** field. Left unchecked, the system does not prevent learners from starting and completing learning components out of order. By default, this field is unchecked.



Step	Action
71.	Confirm or change activity component information in the **Activity Components** section as needed.

Activity Components **fields include:**

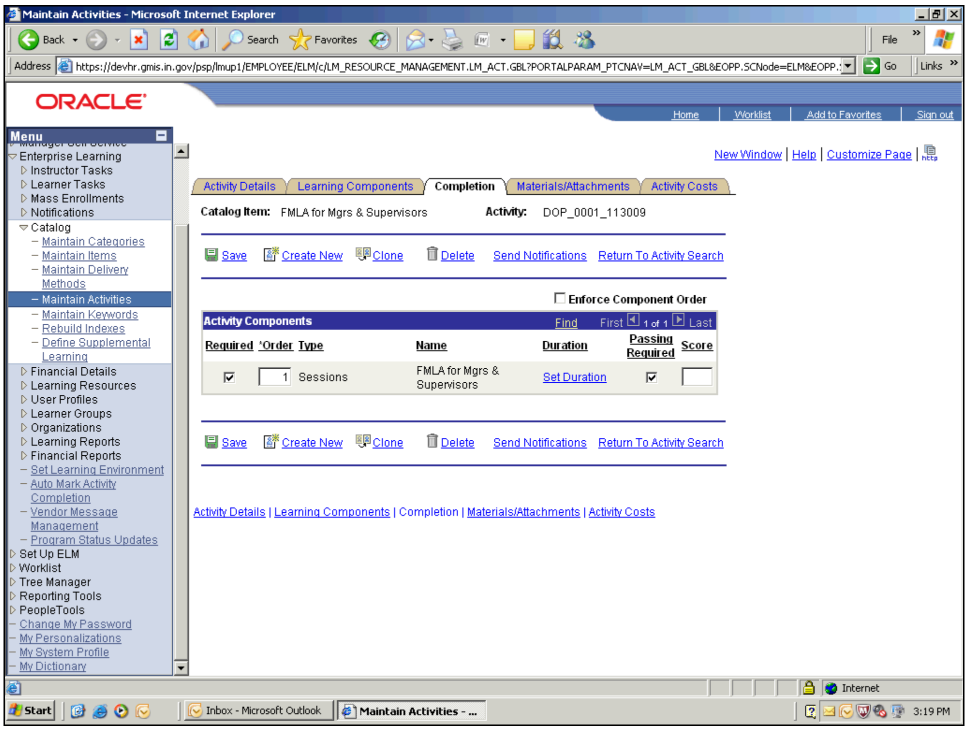
Required - Check this checkbox if the learning component is required to complete the activity. If the checkbox is unchecked, the learning component is optional for the learner. The system checks this checkbox by default.

Order - The numerical order the system lists the learning components for the learner on the ***Activity Progress*** page. If the ***Enforce Component Order*** checkbox is checked, the system forces the learner to complete the learning components in the order established here. As one learning component is completed, the next learning component becomes available.

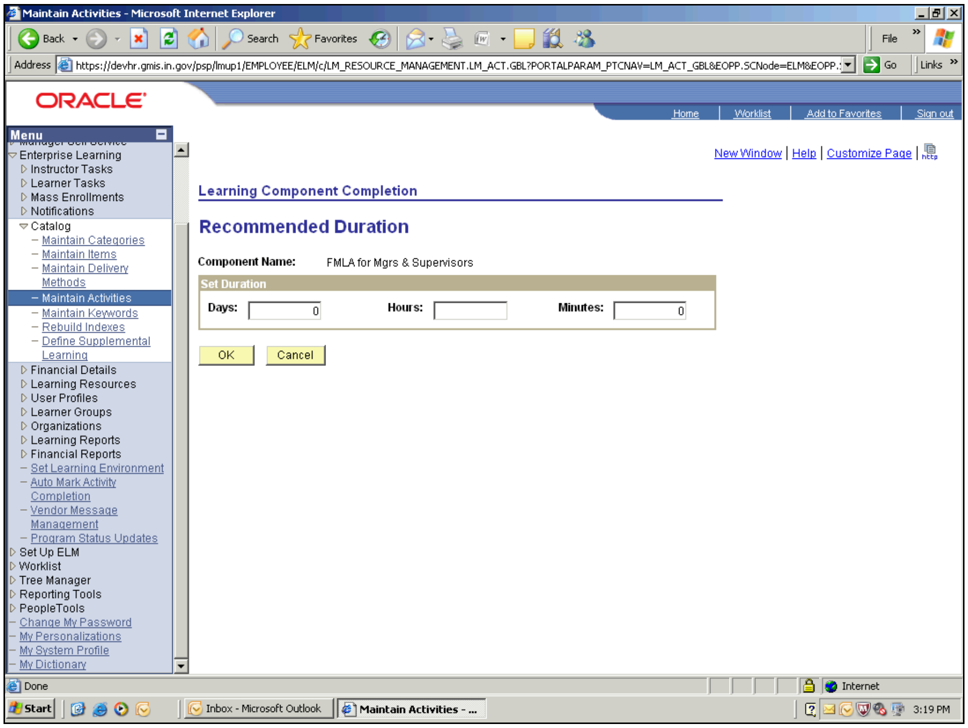
Set Duration - The ***Set Duration*** link allows access to the recommended duration pate to enter the amount of time estimated to complete the learning component.

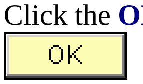
Passing Required - Check this checkbox to require learners to receive a passing status of **Pass** in order to successfully complete the learning component. If the checkbox is unchecked, the learner does not need to pass the component successfully to complete it.

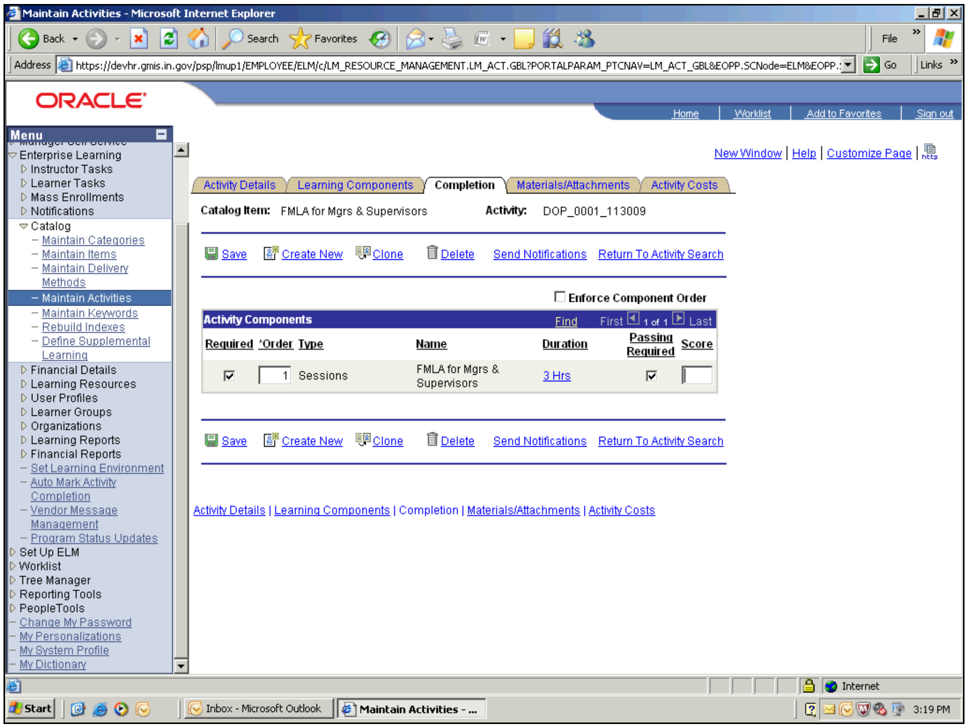
Score - The minimum score a learner must achieve in the learning component to receive a passing status of **Pass**. Leaving this field blank indicates no passing score is needed.



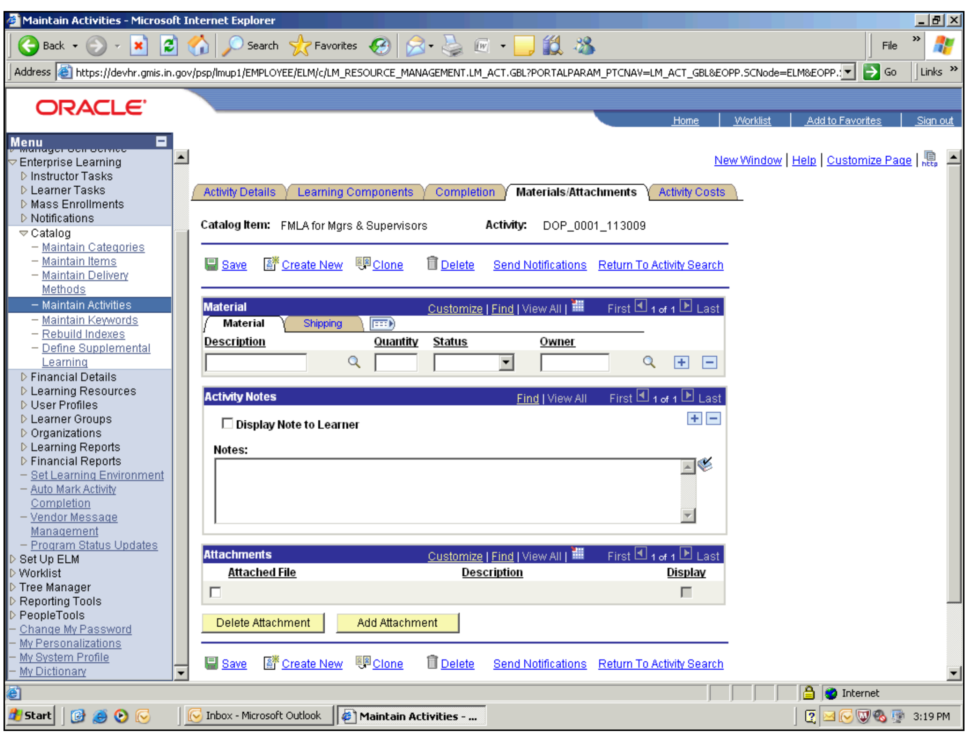
Step	Action
72.	Click the **Set Duration** link in the **Duration** column. Set Duration

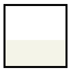


Step	Action
73.	Enter the estimated activity session duration into the **Days, Hours,** and/or **Minutes** fields as required.
74.	Click the **OK** button. 

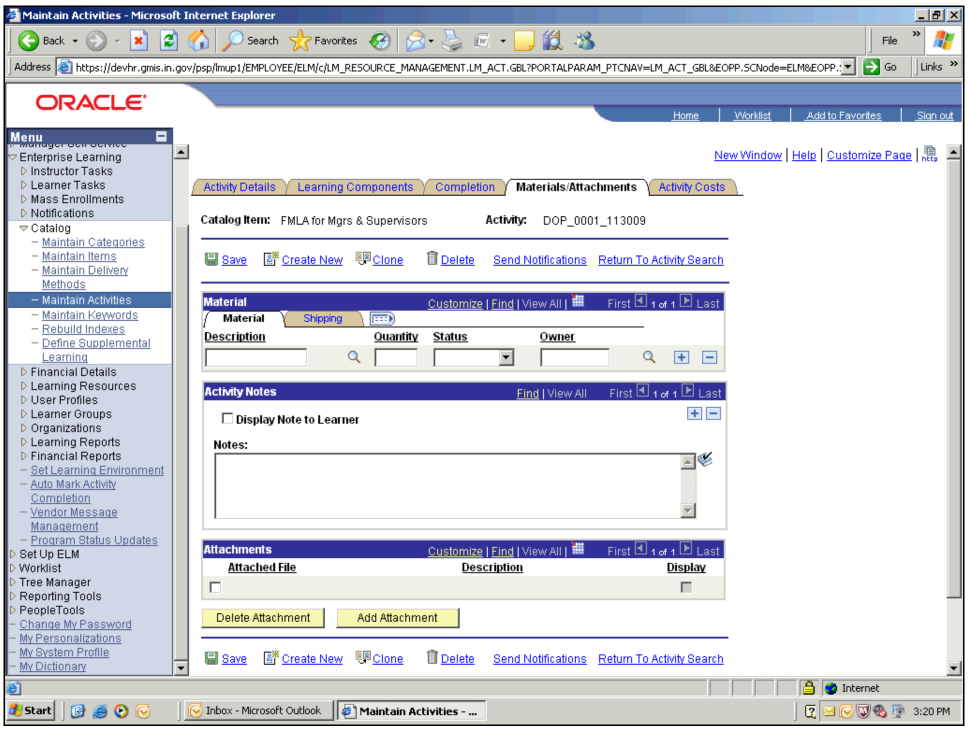


Step	Action
75.	Click the **Materials/Attachments** tab. Materials/Attachments

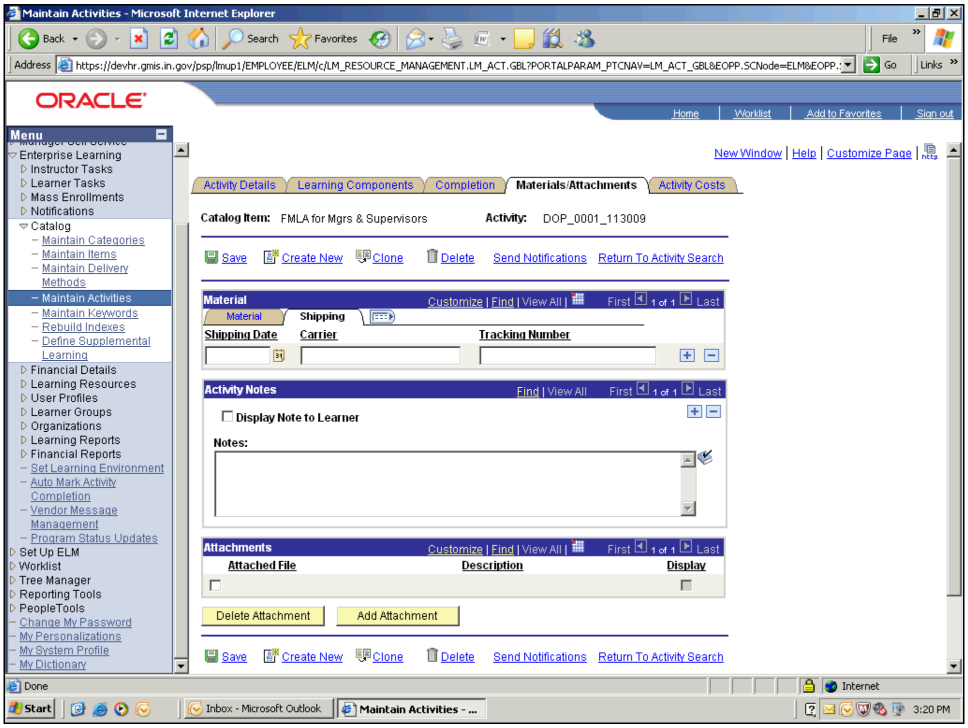


Step	Action
76.	Enter any materials information into the **Material** section. 

The **Materials Tab** allows the selection of materials, specification of quantities, setting the statuses of ***Progress*** or ***Shipped***, and owner specification.

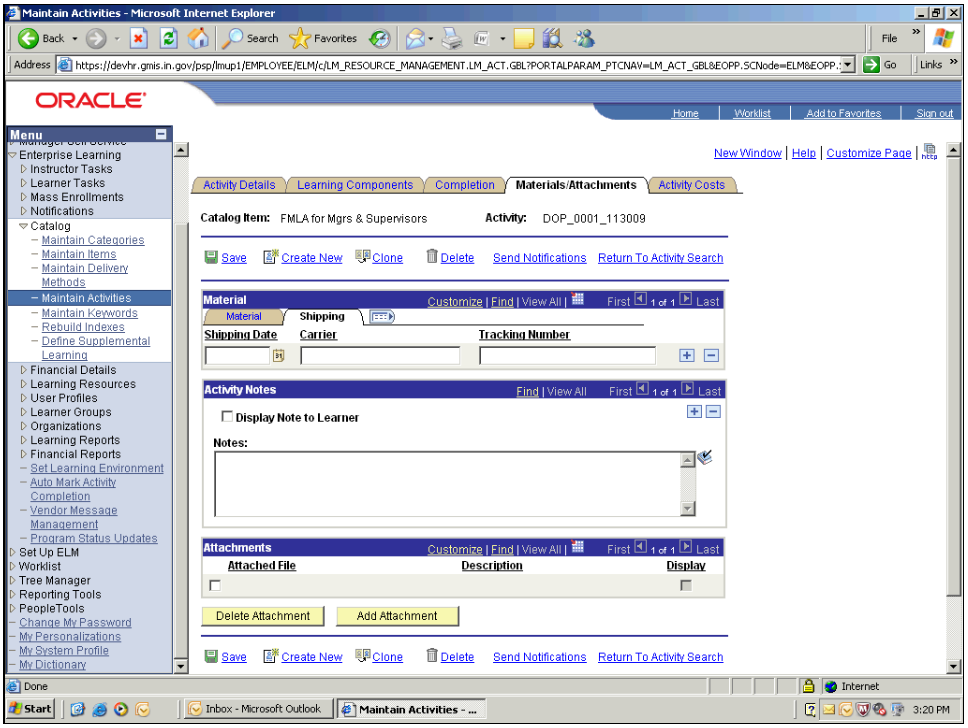


Step	Action
77.	Click the **Shipping** tab. 



Step	Action
78.	Enter any shipping information on the **Shipping** tab.

The **Shipping Tab** allows the entering of material shipping date, carrier, and tracking number information.



Step	Action
79.	Enter any activity related notes in the **Activity Notes** section.

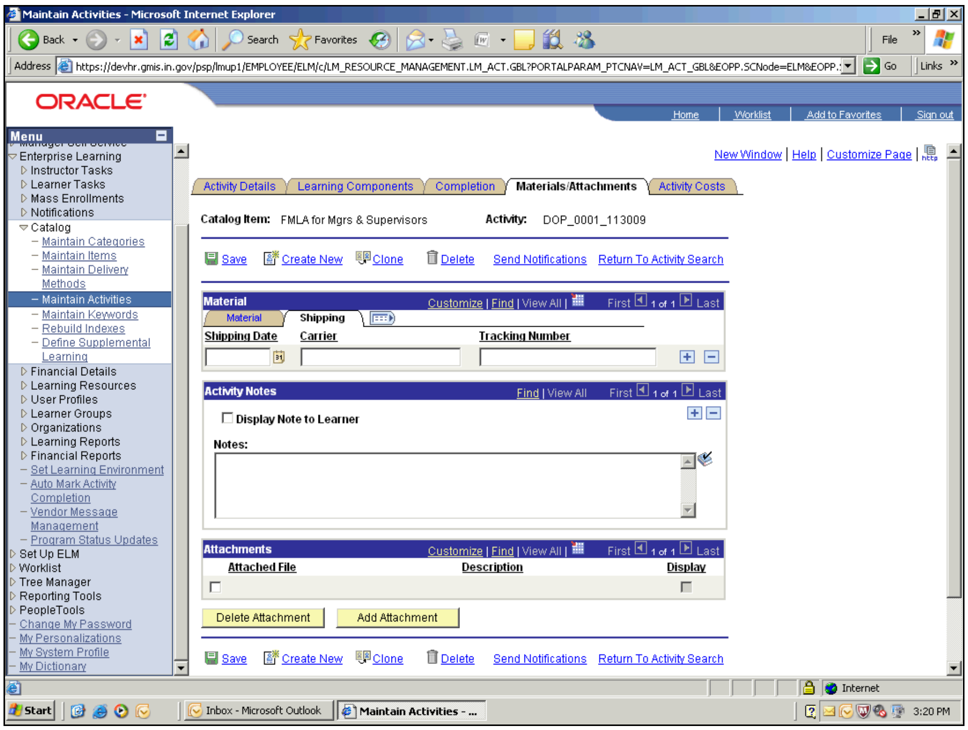
The **Activity Notes** section permits any activity related notes to be entered. This information would be information in addition to and separate from the activity description or objectives.

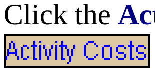
Check the **Display Note to Learner** checkbox for the notes entered to appear to the learner on the **Item Detail** page and **Activity Detail** page.

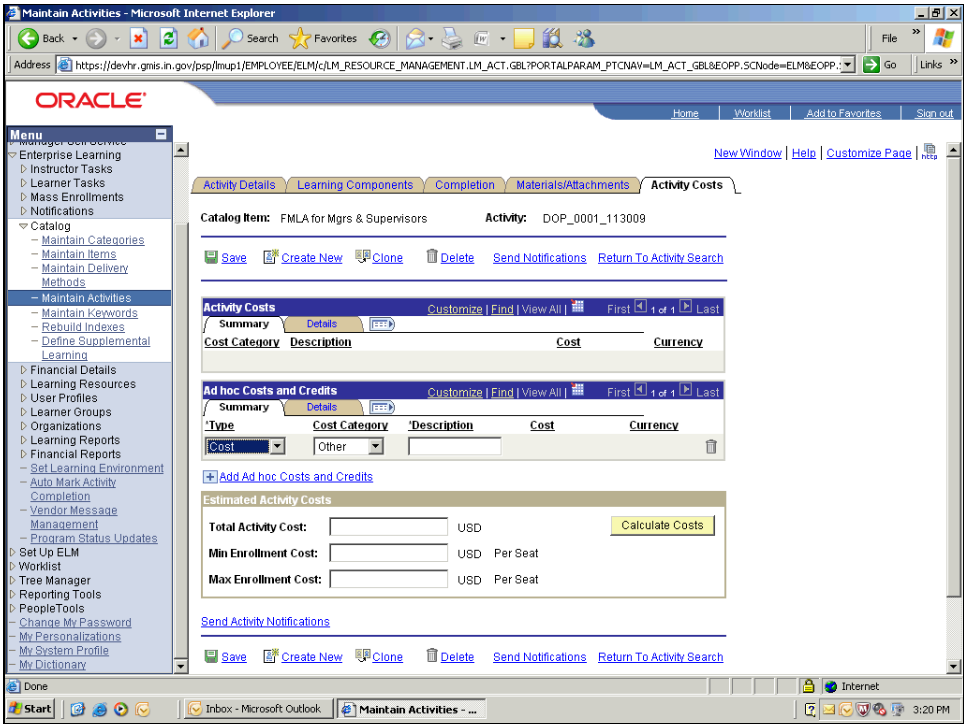
Step	Action
80.	Add or remove any activity attachments in the **Attachments** section.

To add attachments:
Click the **Add** Attachment button
Click the **Browse** button to locate the file for attachment
Click the **Upload** button
Enter a description in the **Description** field

	Check the **Display** checkbox for display in the course catalog ***To remove existing attachments:*** Check the checkbox to the left of the attachment in the **Attached File** column Click the **Delete Attachment** button



Step	Action
81.	Click the **Activity Costs** tab. 

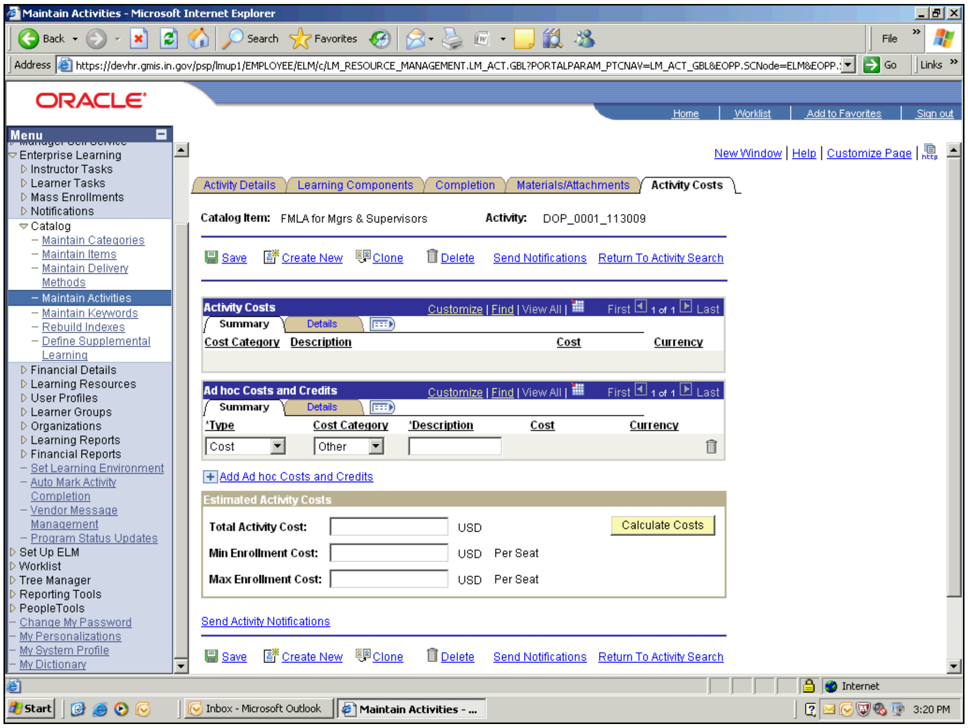


Step	Action
82.	Review any activity costs appearing the **Activity Costs - Summary** section, if the costing function is used.

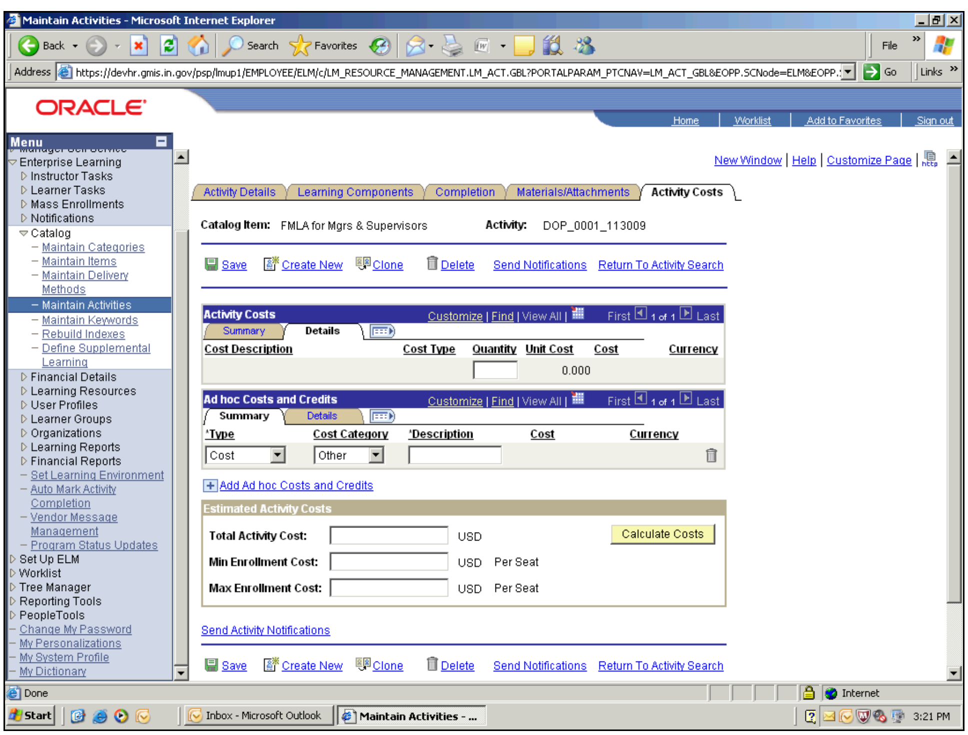
Activity Cost Summary **system calculated cost fields include:**

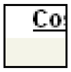
Cost Category and **Description** - Indicates what the cost is for. Categories include content, equipment, facility, instructor, material, and vendor - anything that has a cost associated with it.

Cost - the overall category cost.



Step	Action
83.	Click the **Details** tab. 



Step	Action
84.	Review any activity costs appearing the **Activity Costs - Details** section, if the costing function is used. 

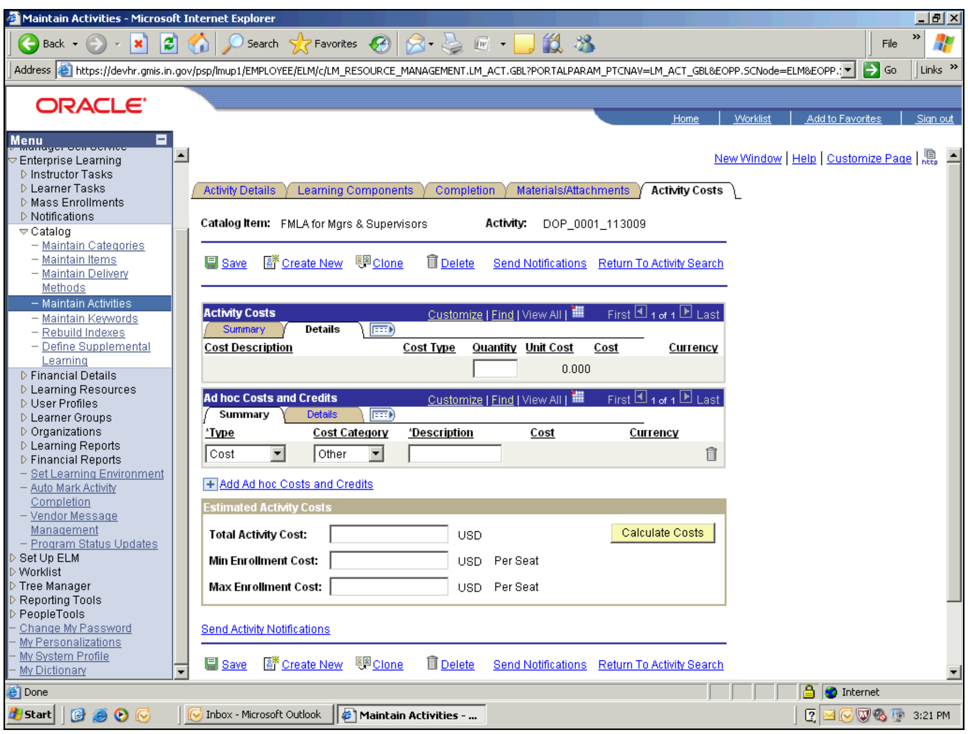
Activity Cost - Details **system calculated cost fields include:**
Cost Description - what the cost is for. Categories include content, equipment, facility, instructor, material, and vendor - anything that has a cost associated with it.

Cost Type - the cost frequency: ***Day, Fixed, Hour, Student,*** or ***Week***.

Unit Cost - the cost calculation of the cost type per each quantity unit.

Cost - the unit cost multiplied by each quantity unit to yield the total cost.

Activity Cost - Details **fields include:**
Quantity - the number of an individual cost type. A value can be entered into this field for all cost types except for **Content** and **Vendor** which have a fixed quantity.



Step	Action
85.	Enter any ad hoc activity costs and credits in the **Ad hoc Costs and Credits - Summary** section, if the costing function is used. Click the **Add Ad hoc Costs and Credits** link to add multiple costs or credits.

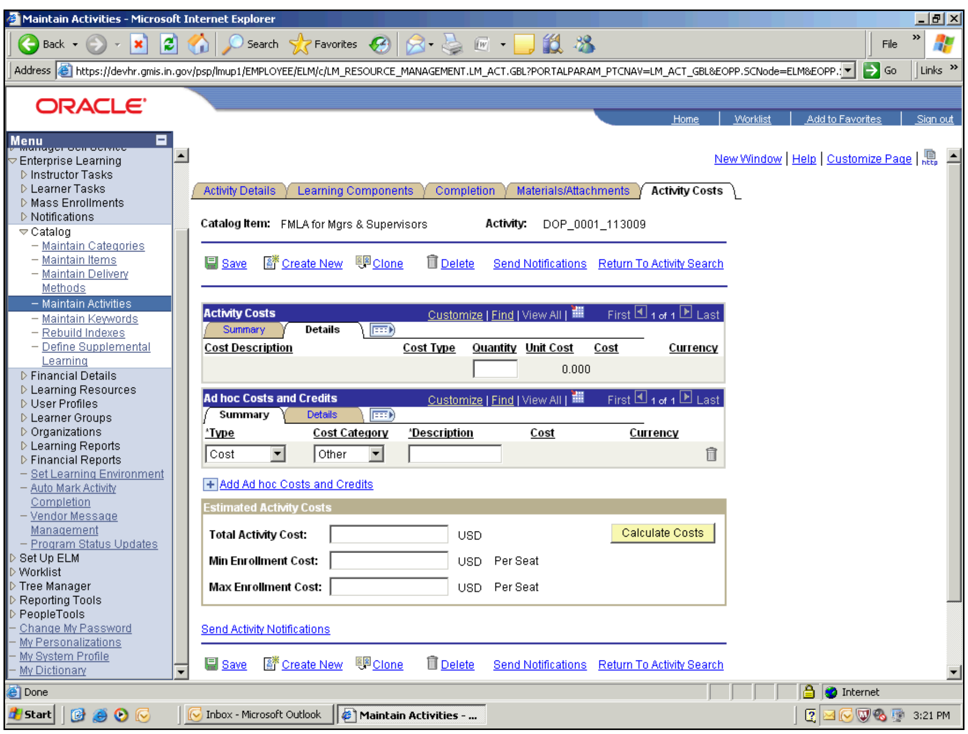
***Ad hoc Costs and Credits - Summary* fields include:**
Type - Options are ***Cost*** or ***Credit***.

Cost Category - category options include ***Content, Equipment, Facility, Instr. Fee*** (instructor fee), ***Material, Other*** and ***Vendor***.

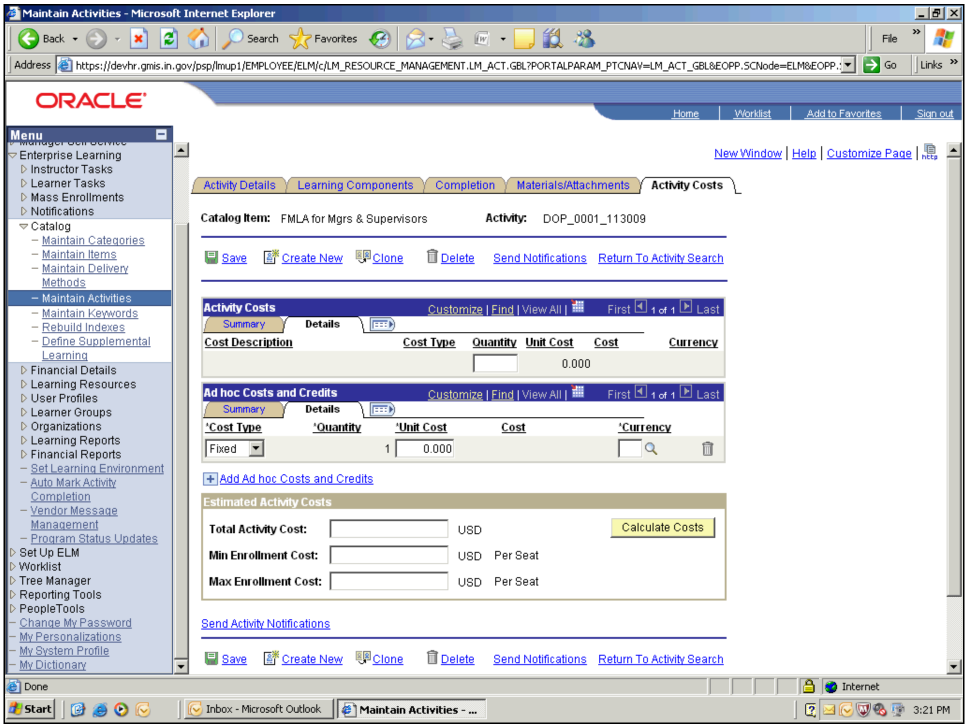
Description - when the ***Other*** or ***Content*** cost categories are selected, a decription of the cost may be entered here.

***Ad hoc Cost and Credits - Summary* system calculated cost fields include:**

Cost - the total cost based on the quantity and units on the **Details** tab.



Step	Action
86.	Click the **Details** tab. Details



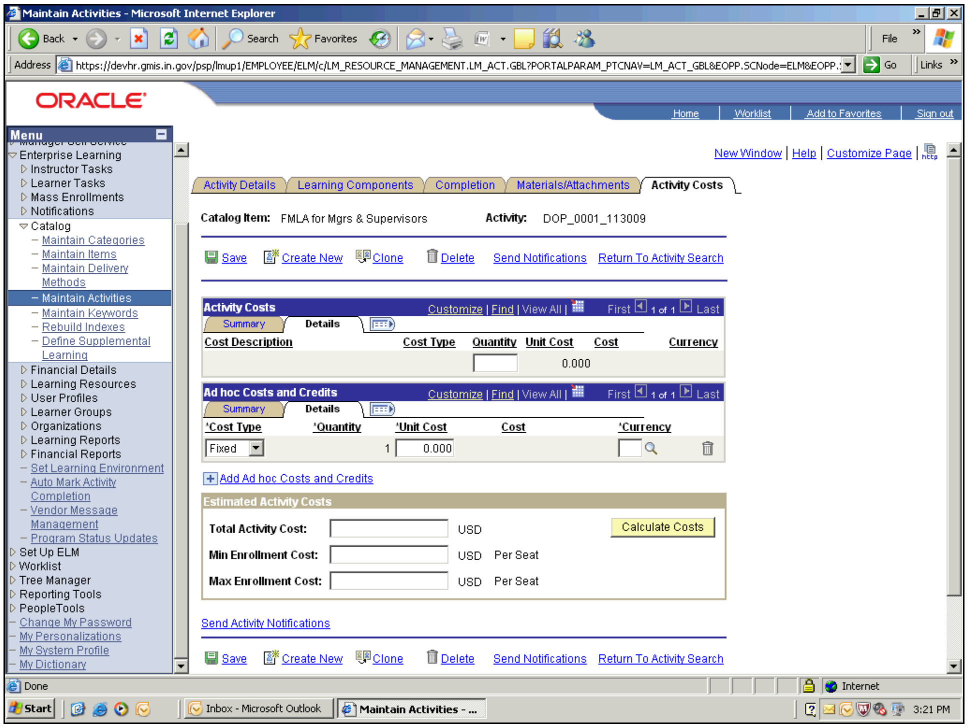
Step	Action
87.	Review any activity costs appearing the **Ad hoc Costs and Credits - Details** section, if the costing function is used.

Ad hoc Costs and Credits - Details **fields include:**
Cost Type - cost frequency options are ***Day, Fixed, Hour, Student*** or ***Week***.

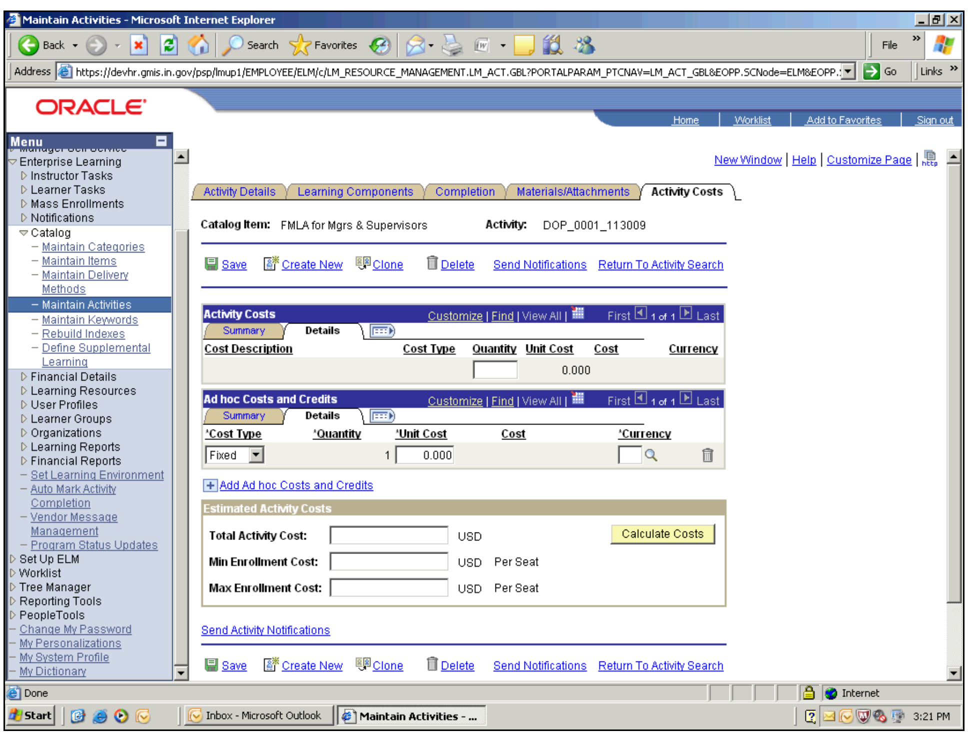
Unit Cost - the unit cost corresponding to the unit type.

Ad hoc Cost and Credits - Details **system calculated cost fields include:**
Quantity - the quantity for the cost type of Fixed is always 1. The quantity for all other cost types would be the actual quantity.

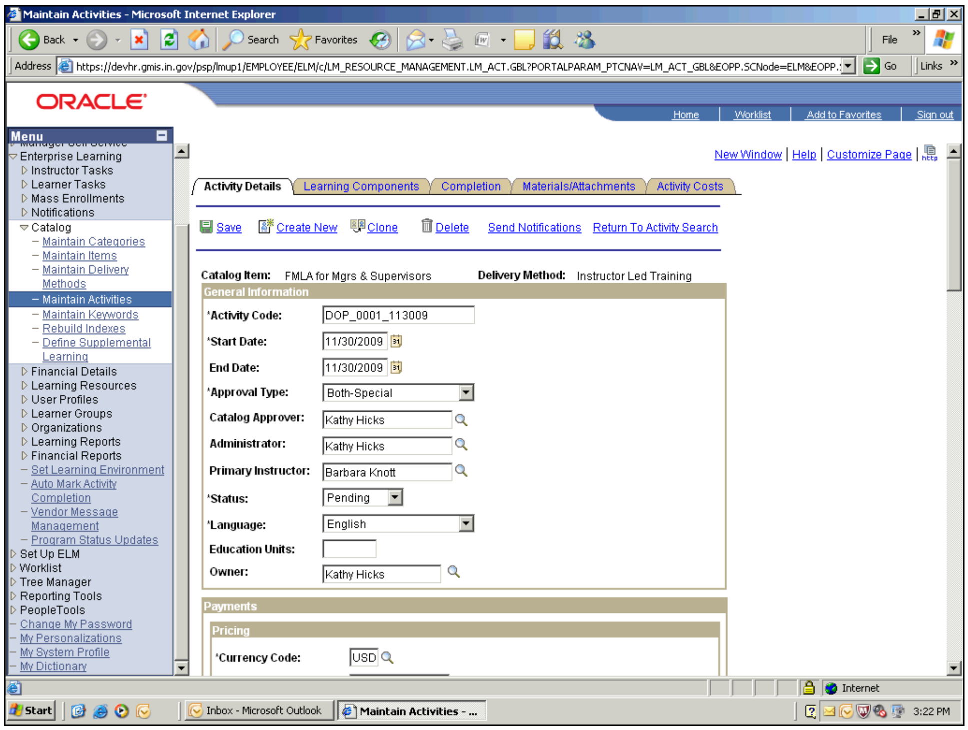
Cost - the total cost based on the quantity multiplied by the unit cost.



Step	Action
88.	Click the **Calculate Costs** button to populate the **Estimated Activity Cost** section fields. Calculate Costs



Step	Action
89.	Review the **Estimated Activity Cost** section fields. Calculate Costs
90.	Click the **Activity Details** tab. Activity Details



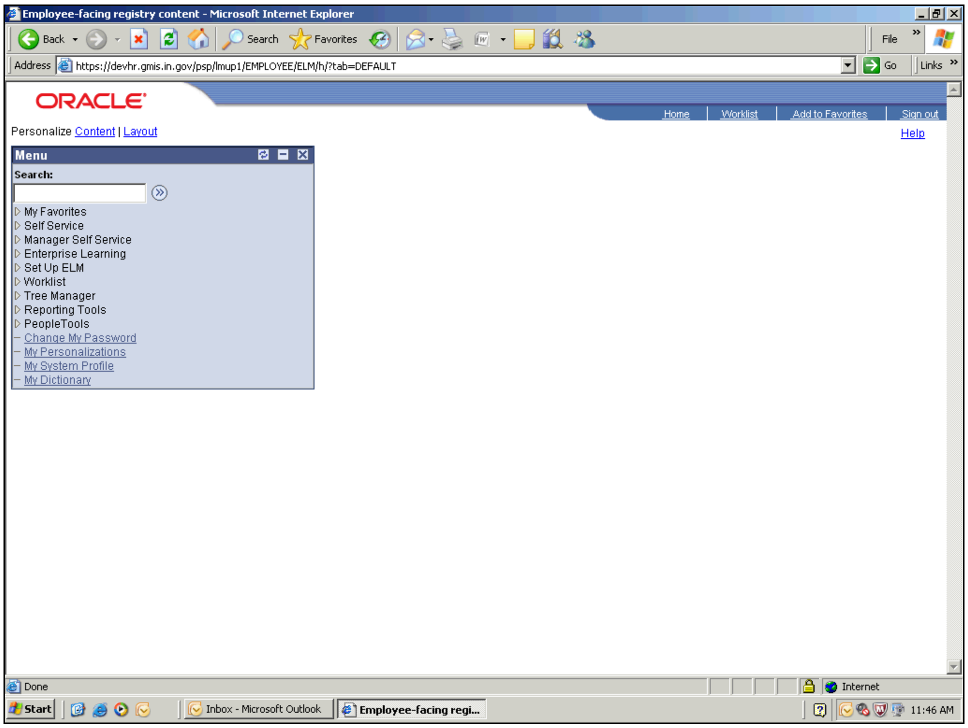
Step	Action
91.	Click the **Status** drop-down menu button.
92.	Select **Active** from the list of values to make the activity visible to learners in the course catalog. Active
93.	Click the **Save** link. Save
94.	Congratulations! You have successfully created or updated an Instructor-Led -Training (ILT) activity. **End of Procedure.**

How to Clone an Activity

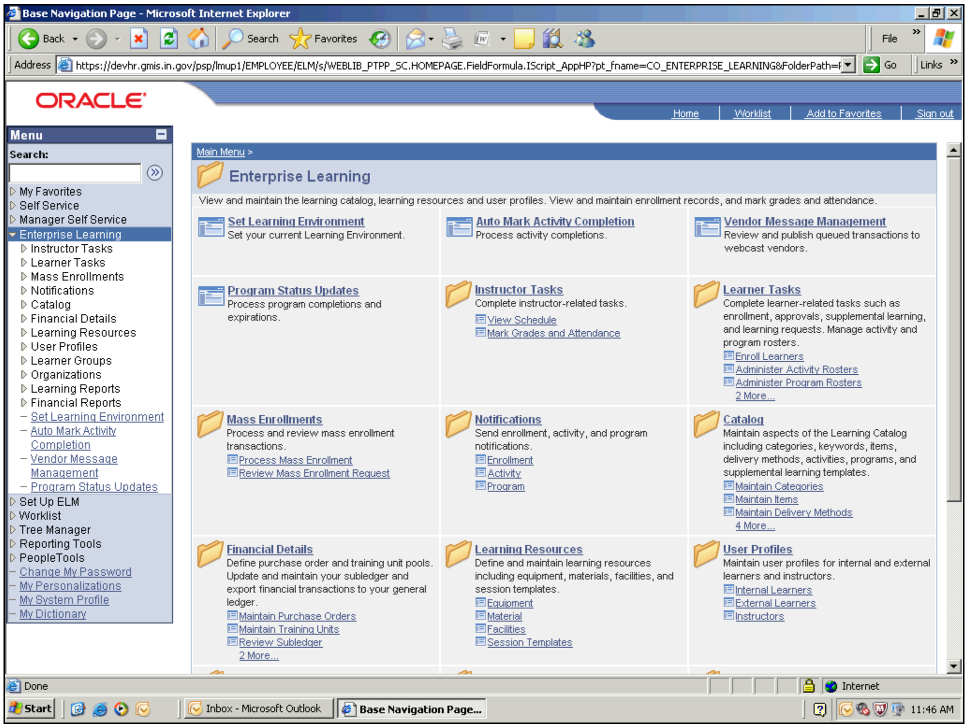
The ELM enables administrators to clone and modify existing learning activities for efficiency.

The cloned activity has the same attributes as the original activity with the exception of those attributes that must be different. For example, two activities can have the same activity code with the same start and end dates, but different session information (dates, rooms, instructors, or equipment) must be defined for each activity.

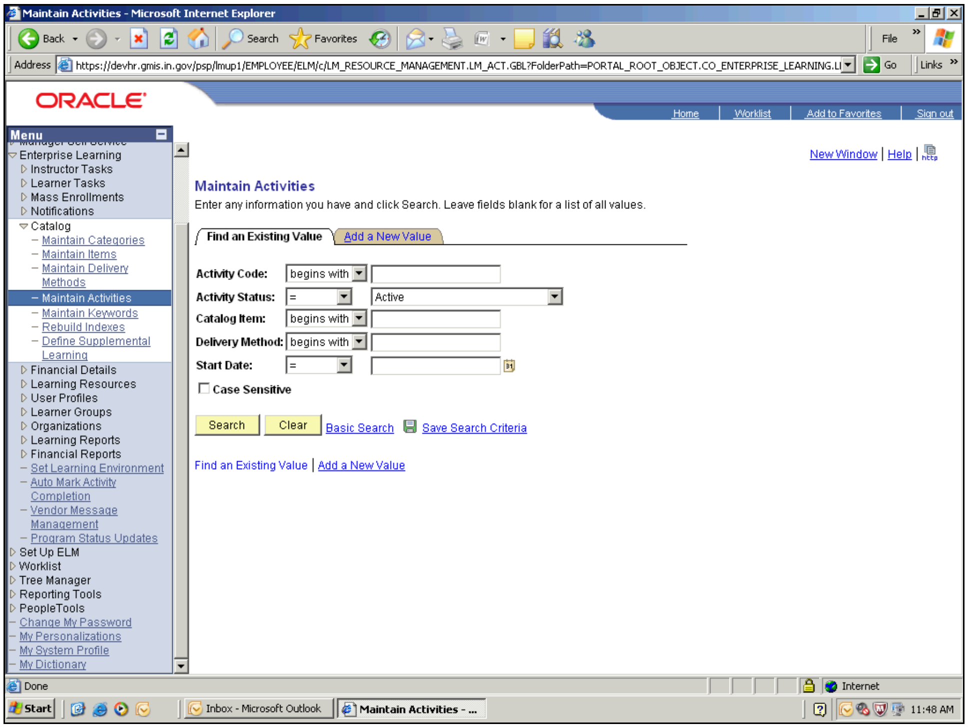
This lesson will teach administrators how to clone and update existing activities.



Step	Action
1.	Click the **Enterprise Learning** link. 



Step	Action
2.	Click the **Catalog** link. Catalog
3.	Click the **Maintain Activities** link. Maintain Activities

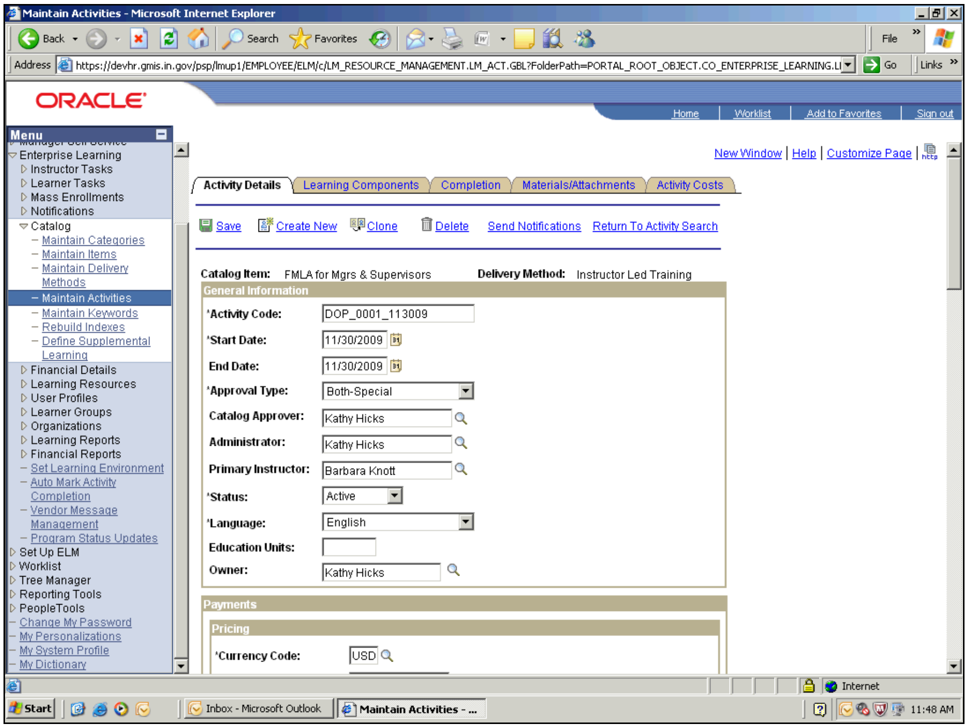


Step	Action
4.	Enter **search criteria** to locate the existing activity to be cloned.

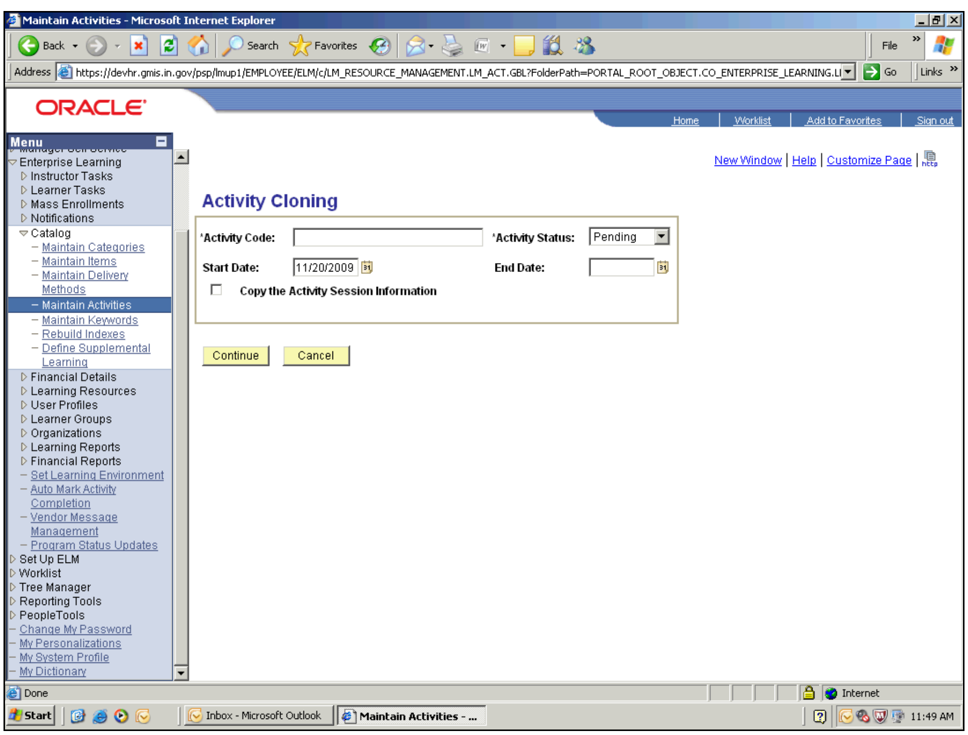
To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
5.	Click the **Search** button. Search
6.	Select the correct activity from the list of values. DOP 0001 113009



Step	Action
7.	Click the **Clone** link. Clone



Step	Action
8.	Change the activity code in the **Activity Code** field for the new activity.

The activity code appears on the course catalog and during registration and is used by administrators, instructors, and learners to identify specific activities.

Step	Action
9.	Click in the **Start Date** field. 11/20/2009
10.	Confirm or change the start date in the **Start Date** field.

The start date is the first day learners can launch content from activities that contain **web-based (computer-based), survey and test learning components**.

The system uses this date to determine when to send an activity reminder if a value is entered in the **Send Reminder** field. The system also uses this value to determine when to send the minimum enrollment notification if a value is entered in the **Min Enroll Days** field to determine the last date a learner can drop the activity without incurring drop charges if a value is entered in the **Last Drop** field.

Step	Action
11.	Click in the **End Date** field.
12.	If an end date is required, enter the activity end date into the **End Date** field.

The end date is the last day learners can launch content from activities that contain **web-based (computer-based), survey and test learning components**.

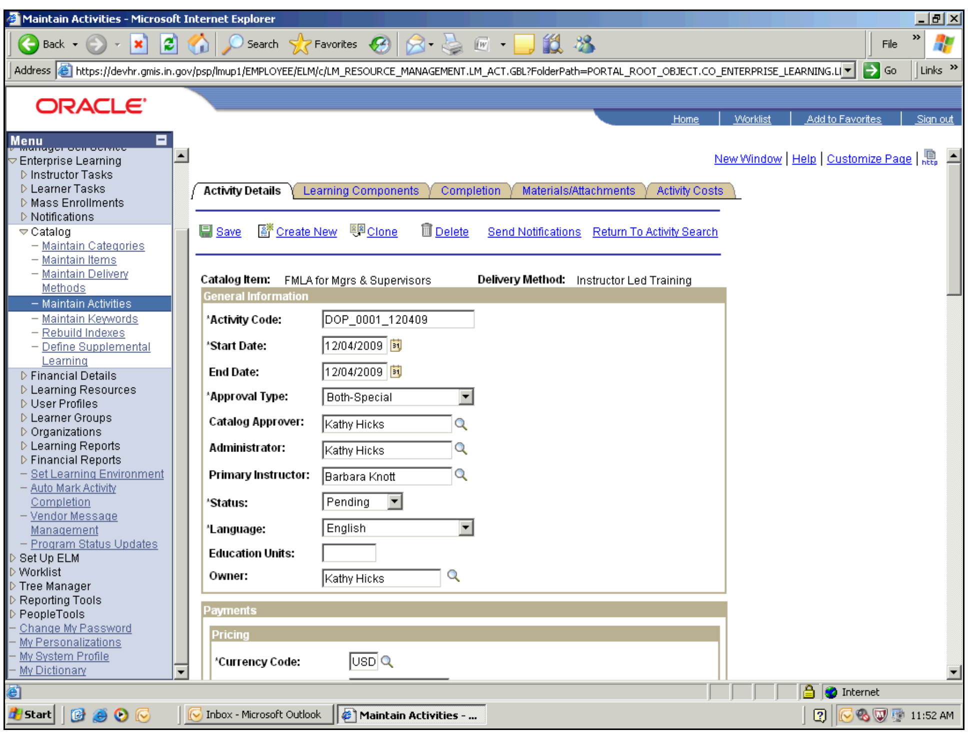
The end date is also the last date learners can enroll in the activity, unless the last enrollment date set for the activity comes first. In addition, the activity end date triggers the **Auto Mark Activity Completion** process if the **Auto Mark Completion** checkbox is checked.

Step	Action
13.	Check the **Copy the Activity Session Information** checkbox to copy session information for a scheduled activity. ☐

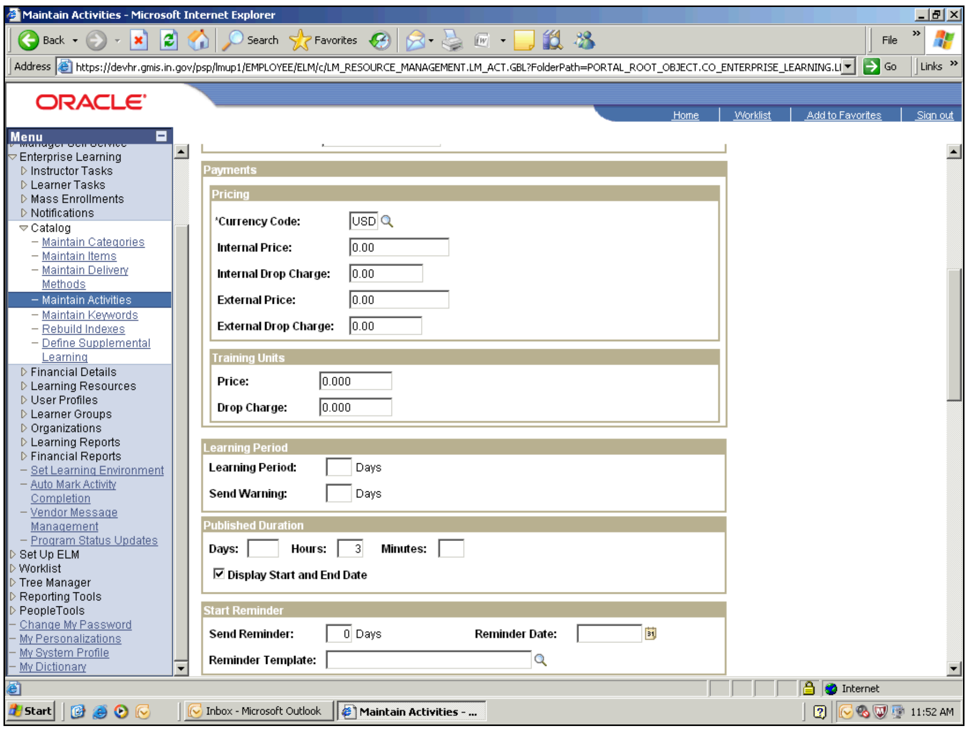
When the **Copy the Activity Session Information** checkbox is checked, **<u>the system copies the exact session information</u>** - dates, rooms, instructors, and equipment - as the original activity.

Access the **Sessions** page for the new activity after you clone it to ensure that there are no scheduling conflicts.

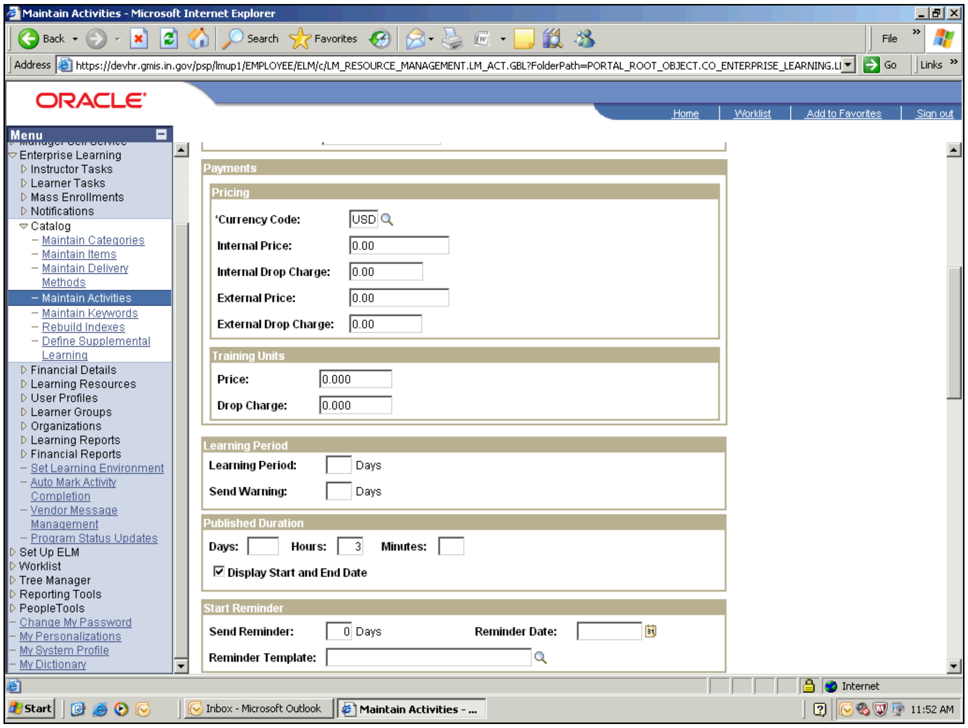
Step	Action
14.	Click the **Continue** button. Continue



Step	Action
15.	Click the **X (Close)** object.
16.	Confirm and/or change activity information as required in the **General Information** section.



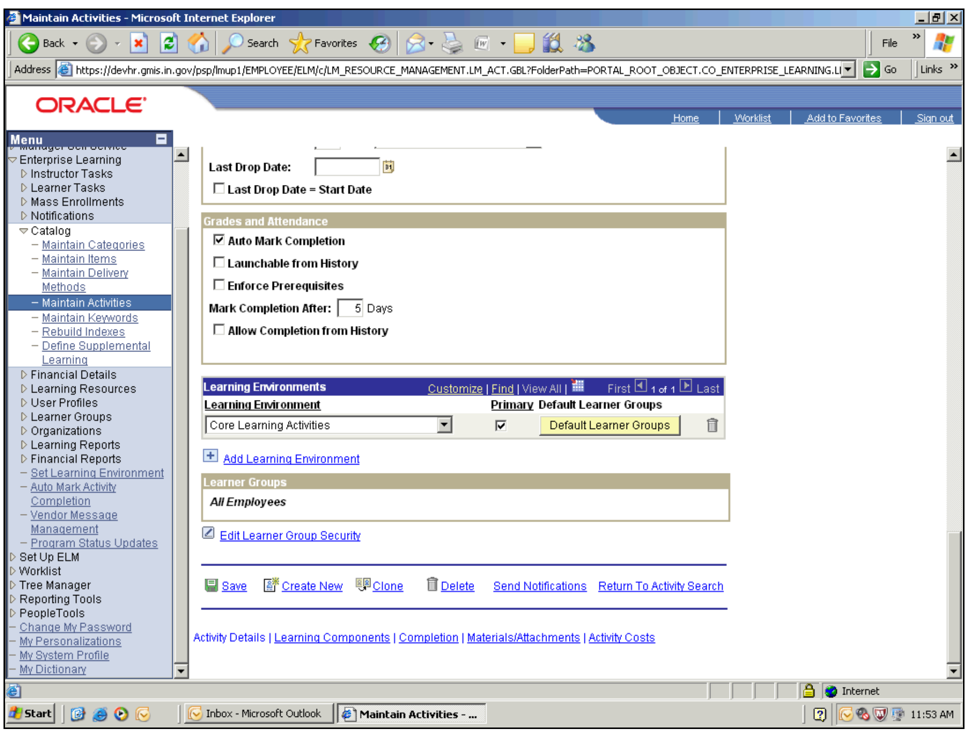
Step	Action
17.	Confirm and/or change pricing and training units' information as required in the **Payments** section.



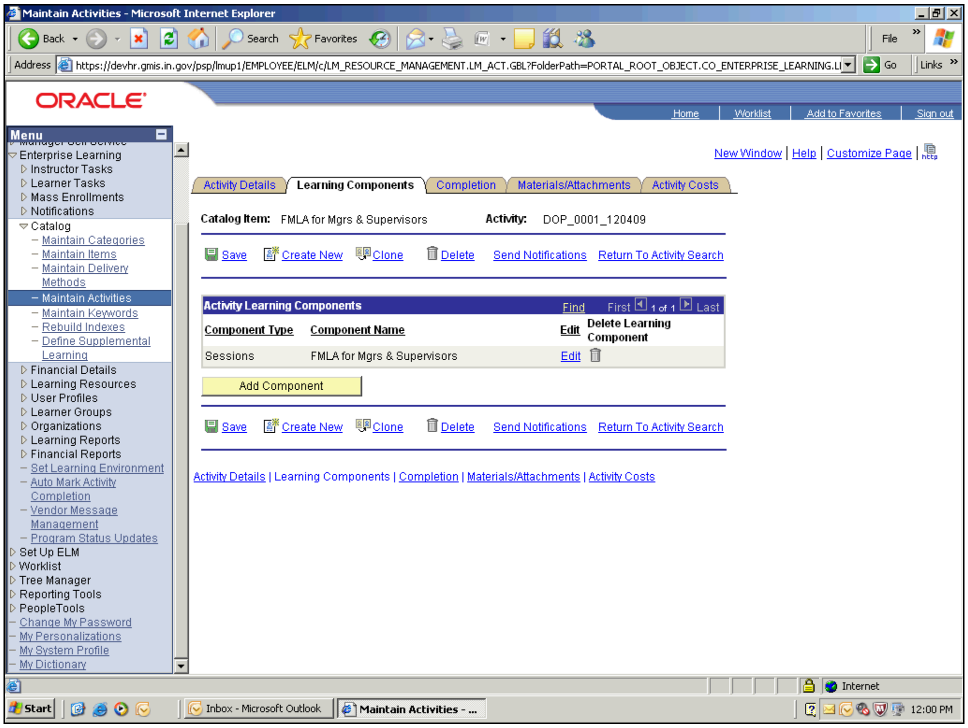
Step	Action
18.	Confirm and/or change learning period information as required in the **Learning Period** section.
19.	Confirm and/or change published duration information as required in the **Published Duration** section.
20.	Confirm and/or change activity reminder information as required in the **Start Reminder** section.
21.	Confirm and/or change activity enrollment information as required in the **Enrollment** section.

For cloned activities, the system sets the **Enrollment Total**, **Total Open Enrollment**, and **Waitlist Total** field values to 0.

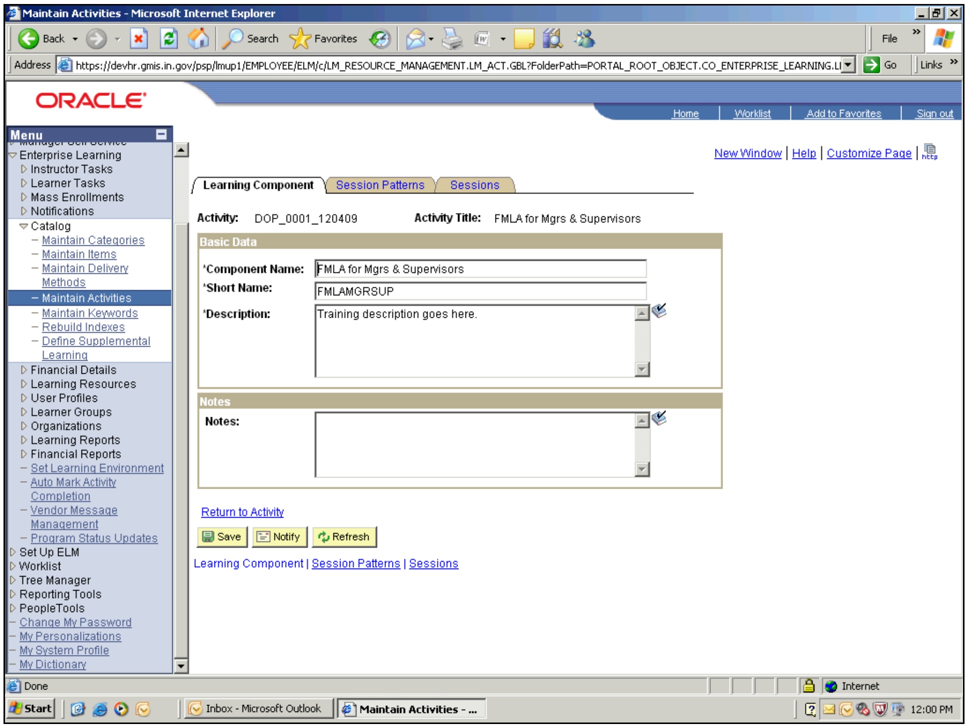
Step	Action
22.	Confirm and/or change activity waitlist information as required in the **Waitlist** section.
23.	Confirm and/or change drop activity information as required in the **Drop Activity** section.
24.	Confirm and/or change activity grades and attendance information as required in the **Grades and Attendance** section.
25.	Confirm and/or change activity learning environments as required in the **Learning Environments** section.
26.	Confirm and/or change activity learner groups as required in the **Learner Groups** section.



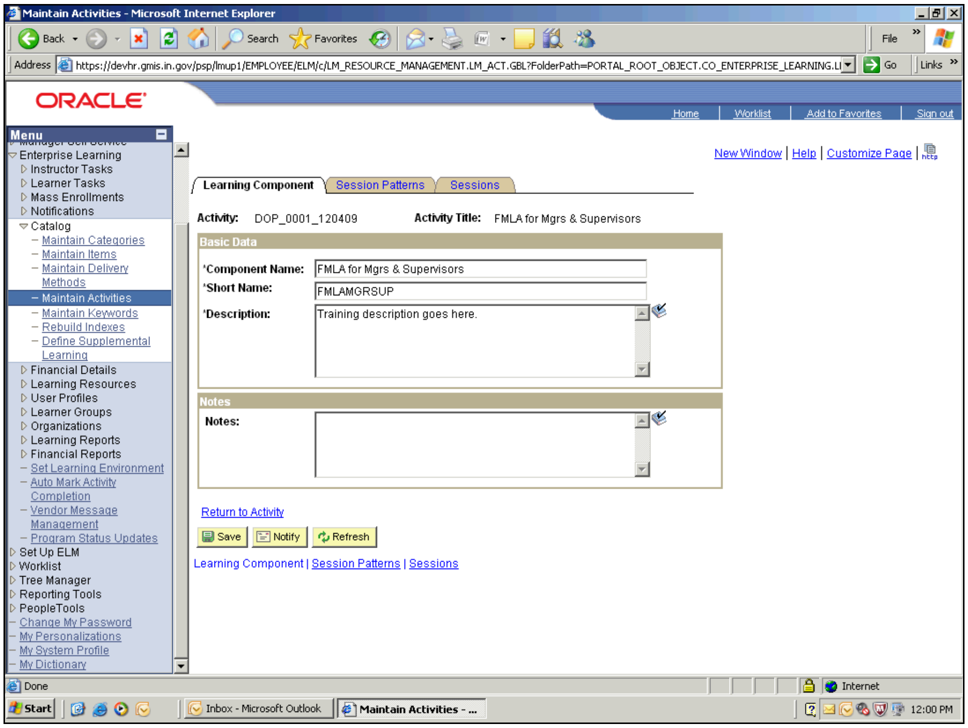
Step	Action
27.	Click the **Learning Components** link. Learning Components



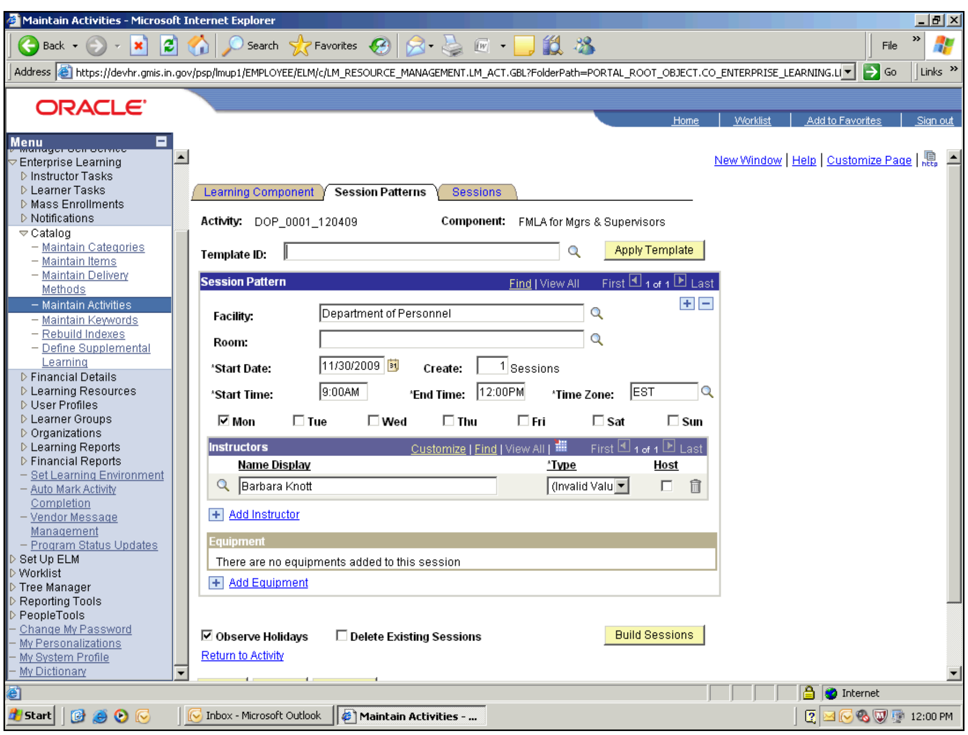
Step	Action
28.	Confirm and/or change activity learning components as required in the **Activity Learning Components** section. Click the **Edit** link in the **Edit** column to update existing component and session information. Edit



Step	Action
29.	Confirm and/or change learning component basic data information as required in the **Basic Data** section.
30.	Confirm and/or change learning component notes information as required in the **Notes** section.



Step	Action
31.	Click the **Session Patterns** tab. Session Patterns



Step	Action
32.	Confirm and/or change session facility information as required in the **Facility** field. Department of Personnel
33.	Confirm and/or change session facility room information as required in the **Room** field, if applicable.
34.	Confirm and/or change the session start date as required in the **Start Date** field. 31

One activity may have several sessions. **The start date of the session may not necessarily be the start date of the activity.** Multiple sessions within an activity are assigned individual session ID numbers to assist with reporting needs.

Step	Action
35.	Confirm and/or change the number of activity sessions as required in the **Create** field. 1

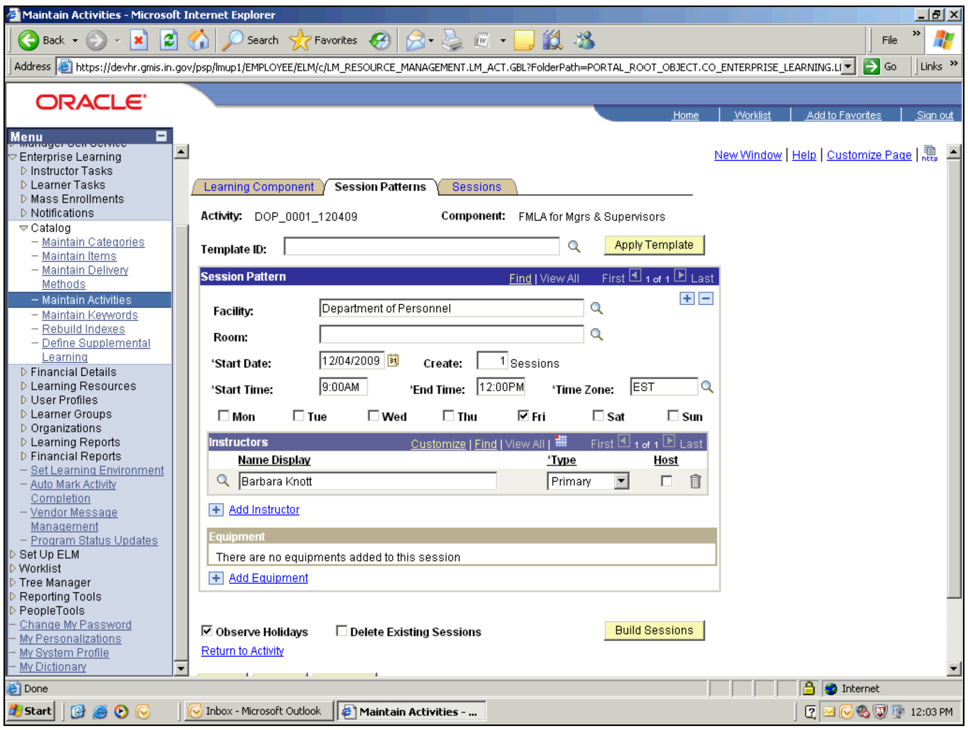
The system will not create any sessions if a number is not entered into the session Create field.

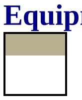
The number of sessions and checking the checkboxes for the correct days of the week helps the system identify repeating session patterns. The session pattern tells the system on which days it can schedule sessions and when to stop repeating the pattern. For example:

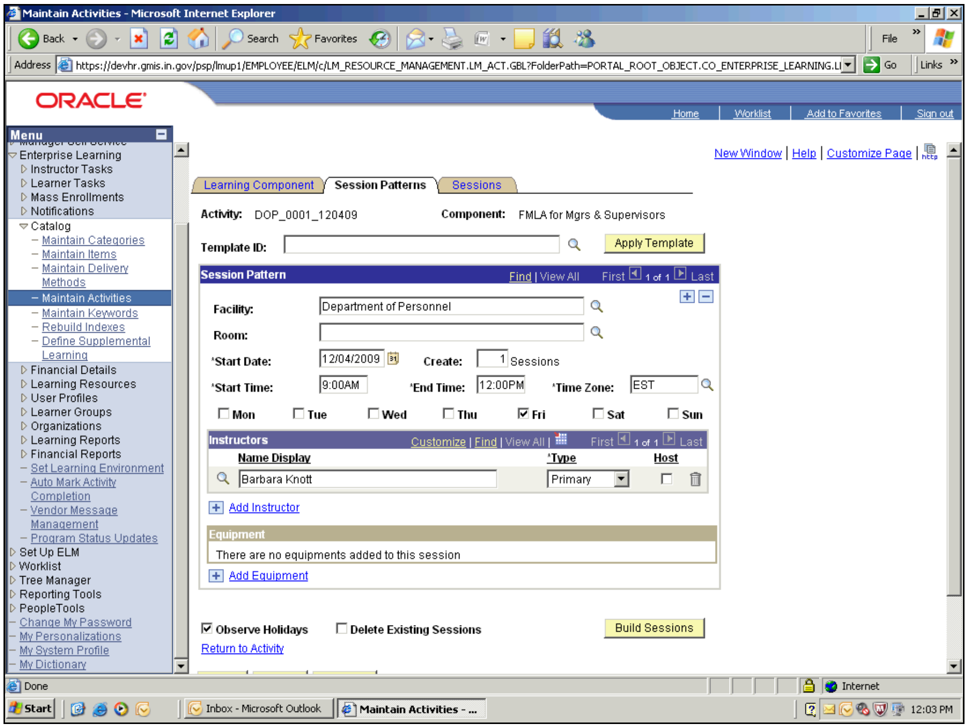
If the number of sessions entered is 10 and the class would repeat on Tuesday and Wednesday (determined by checking the checkboxes), the class would repeat every Tuesday and Wednesday for five weeks.

Step	Action
36.	Confirm and/or change the session start time as required in the **Start Time** field. 9:00AM
37.	Confirm and/or change the session end time as required in the **End Time** field. 12:00PM
38.	Confirm and/or change the session time zone as required in the **Time Zone** field. EST

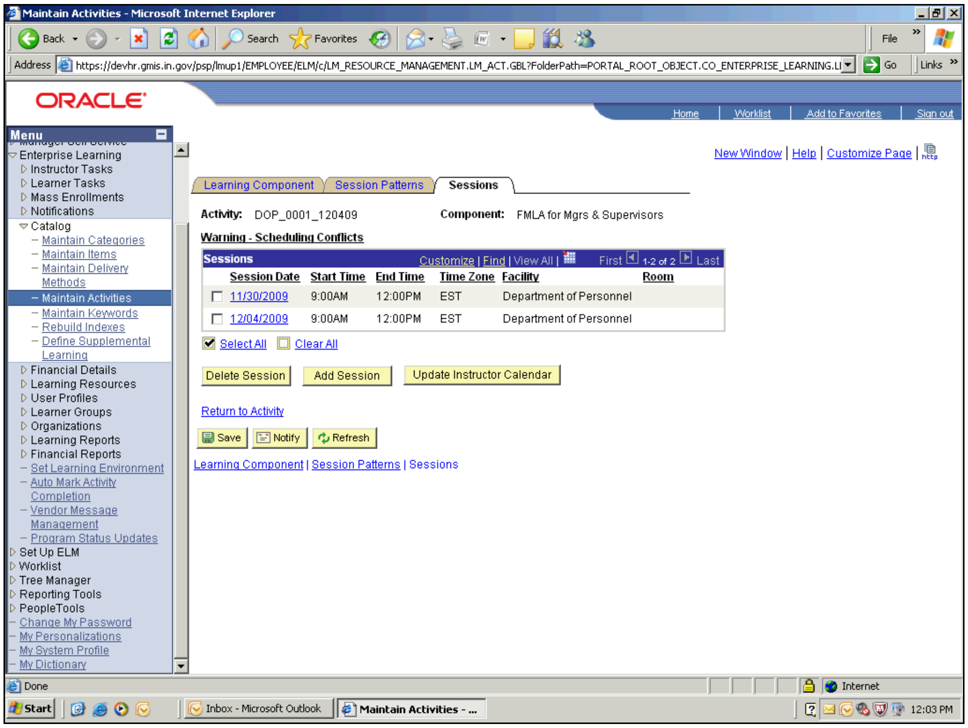
Step	Action
39.	Confirm and/or change the session days based on the session date as required by checking the correct checkboxes. 
40.	Confirm and/or change activity session instructor information as required in the **Instructors** section. 



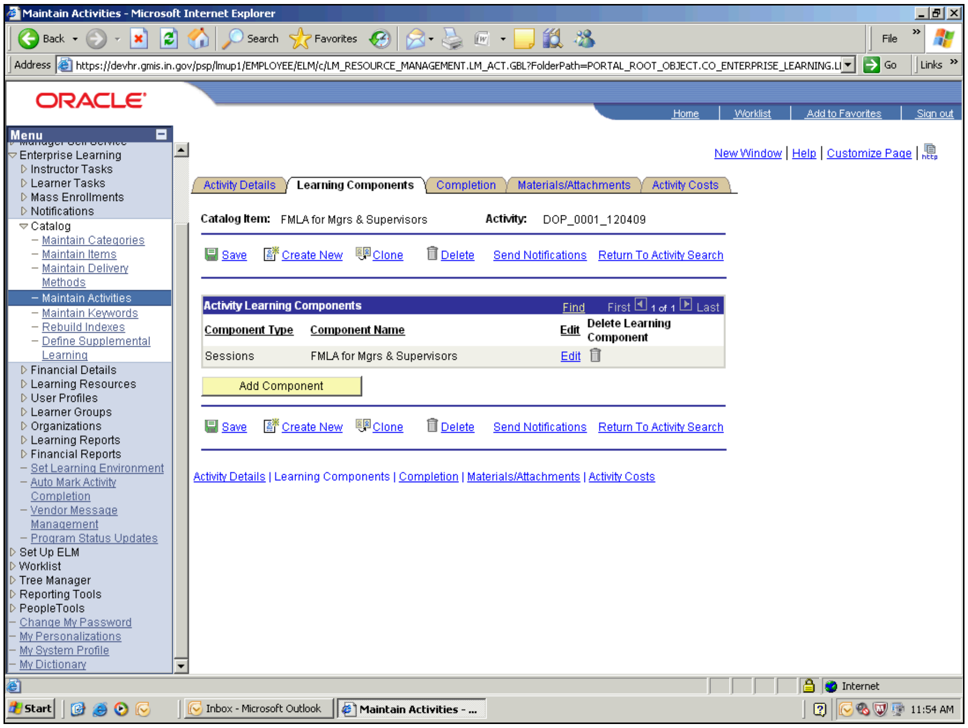
Step	Action
41.	Confirm and/or change activity session equipment information as required in the **Equipment** section. 



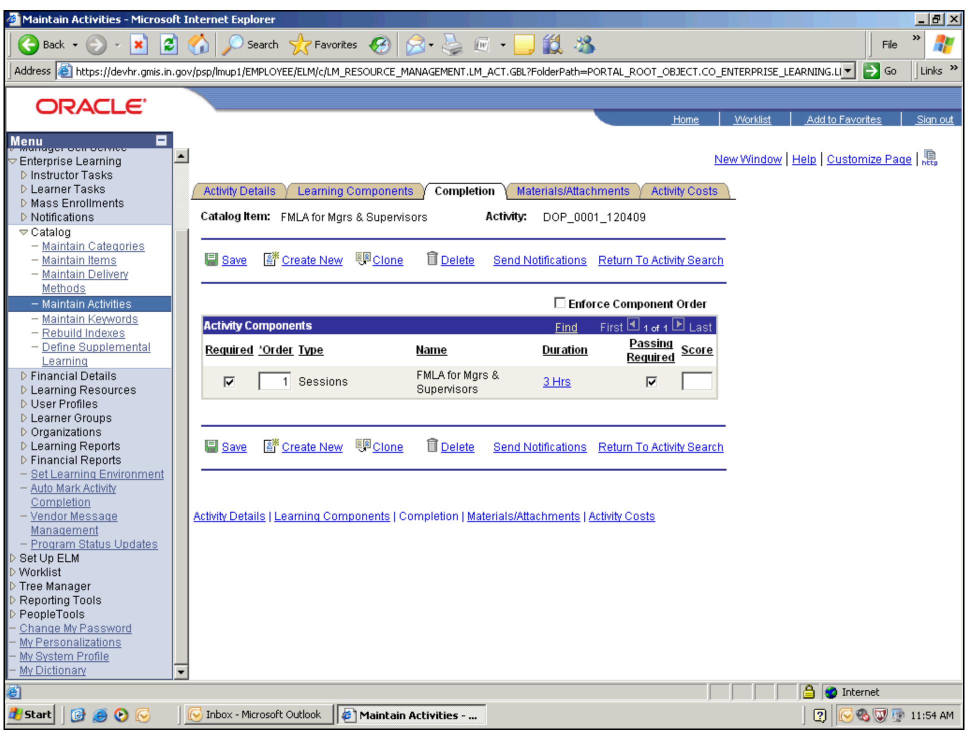
Step	Action
42.	Confirm or check the **Observe Holidays** checkbox to observe the holiday schedule that is linked to the facility selected the session. ☑ Observe Holidays
43.	Check the **Delete Existing Sessions** checkbox to delete any previously built sessions, if desired. Leaving the checkbox unchecked allows the system to add any new sessions to be built to existing sessions. ☐ Delete Existing Sessions
44.	Click the **Build Sessions** button. Build Sessions



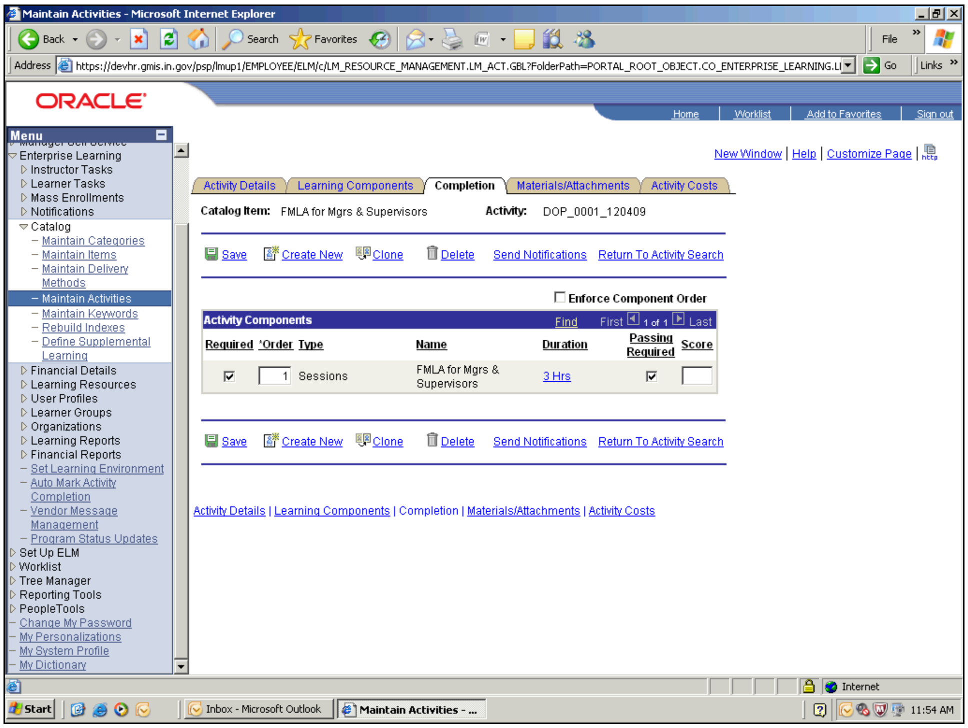
Step	Action
45.	Check the checkboxes to the right of the session(s) in the **Sessions** section to update sessions as needed. - Click the **Add Sessions** button to add new sessions to activity details. - Click the **Update Instructor Calendar** button to add or remove sessions visible to the assigned instructor. - Click the **Delete Session** button to remove sessions.
46.	Click the **Update Instructor Calendar** button. Update Instructor Calendar
47.	Click the **Save** button. Save
48.	Click the **Return to Activity** link. Return to Activity



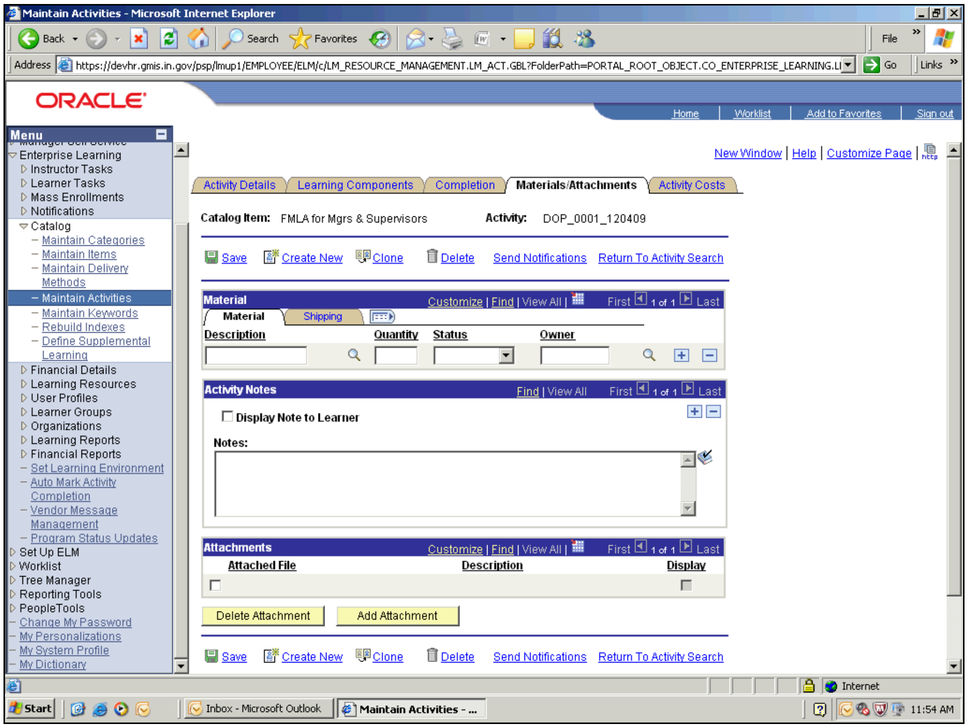
Step	Action
49.	Click the **Completion** tab. Completion



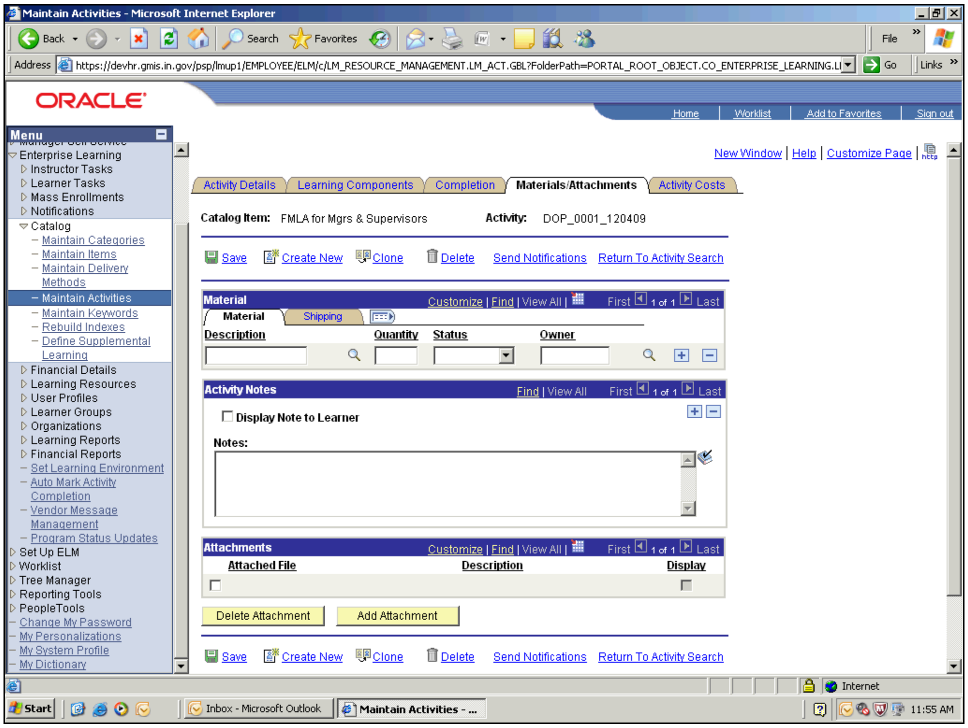
Step	Action
50.	Confirm and/or change activity components information as required in the **Activity Components** section.

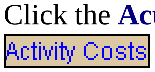


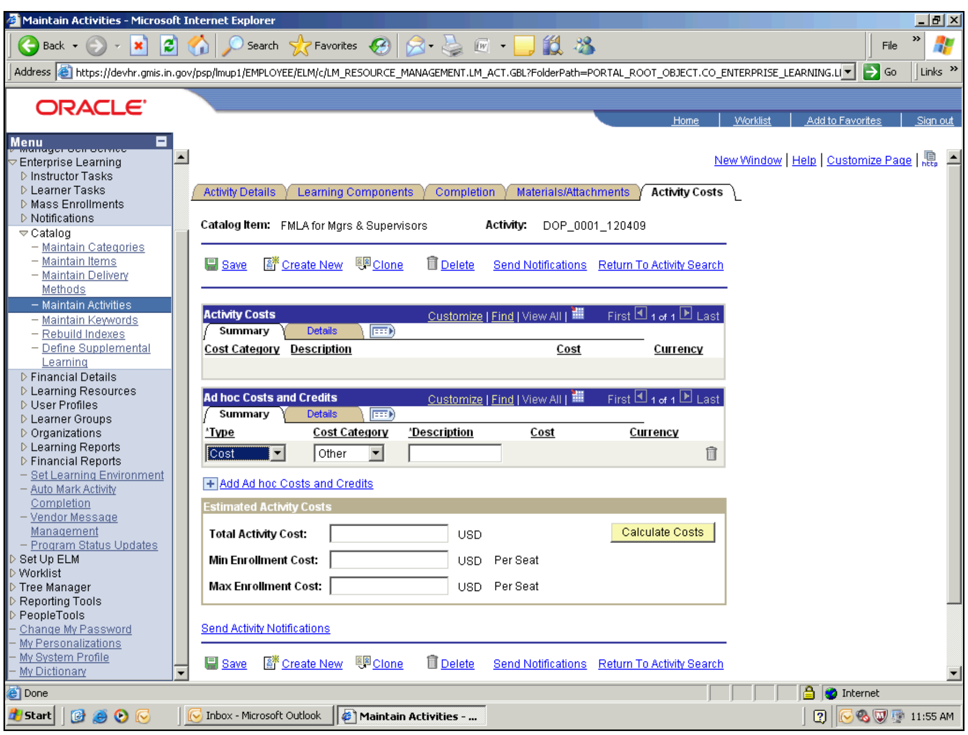
Step	Action
51.	Click the **Materials/Attachments** tab. Materials/Attachments



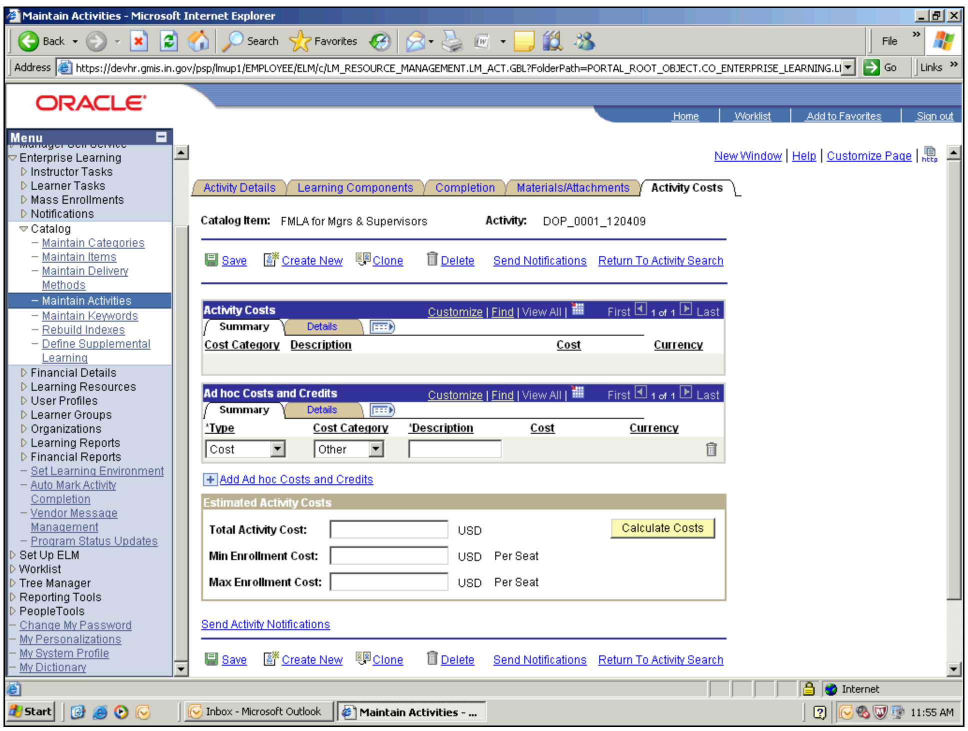
Step	Action
52.	Confirm and/or change activity materials information as required in the **Material** section.
53.	Confirm and/or change activity notes information as required in the **Activity Notes** section.
54.	Confirm and/or change activity file attachments as required in the **Attachments** section.



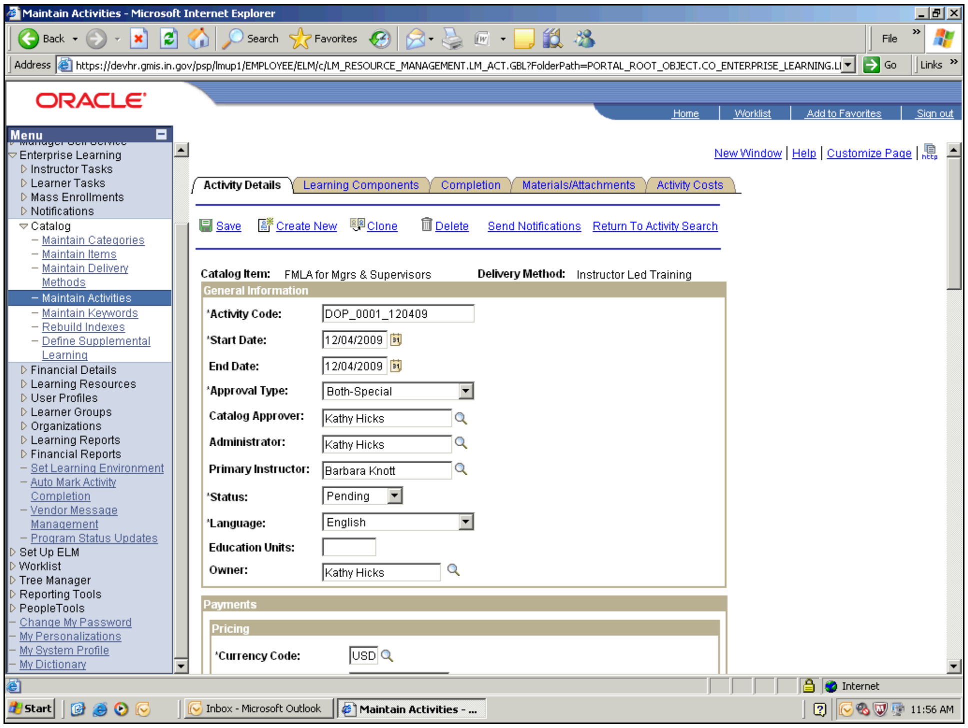
Step	Action
55.	Click the **Activity Costs** tab. 



Step	Action
56.	Confirm and/or change activity costs information as required in the **Activity Costs** section.
57.	Confirm and/or change activity ad hoc costs and credits information as required in the **Ad hoc Costs and Credits** section.
58.	Review system calculated estimated activity costs information by clicking the **Calculate Costs** button in the **Estimated Activity Costs** section, if the costing features are used.



Step	Action
59.	Click the **Save** link. Save
60.	Click the **Activity Details** tab. Activity Details

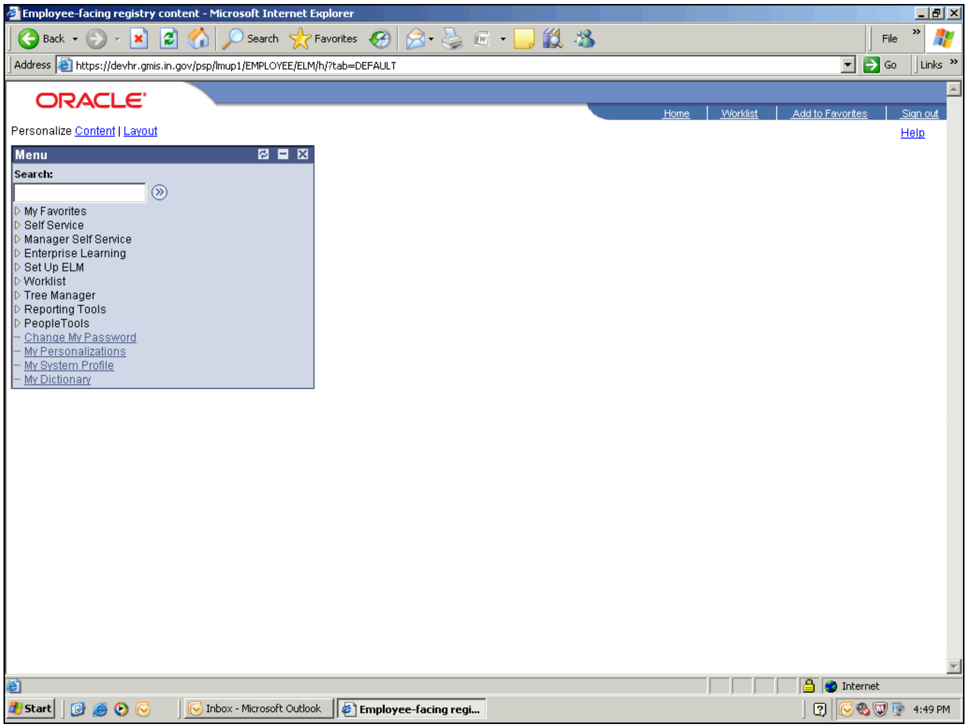


Step	Action
61.	Click the **Status** drop-down menu button.
62.	Select the **Active** from the list of values to make the activity viewable to learners in the course catalog. Active
63.	Click the **Save** link. Save
64.	Congratulations! You have successfully cloned an activity. **End of Procedure.**

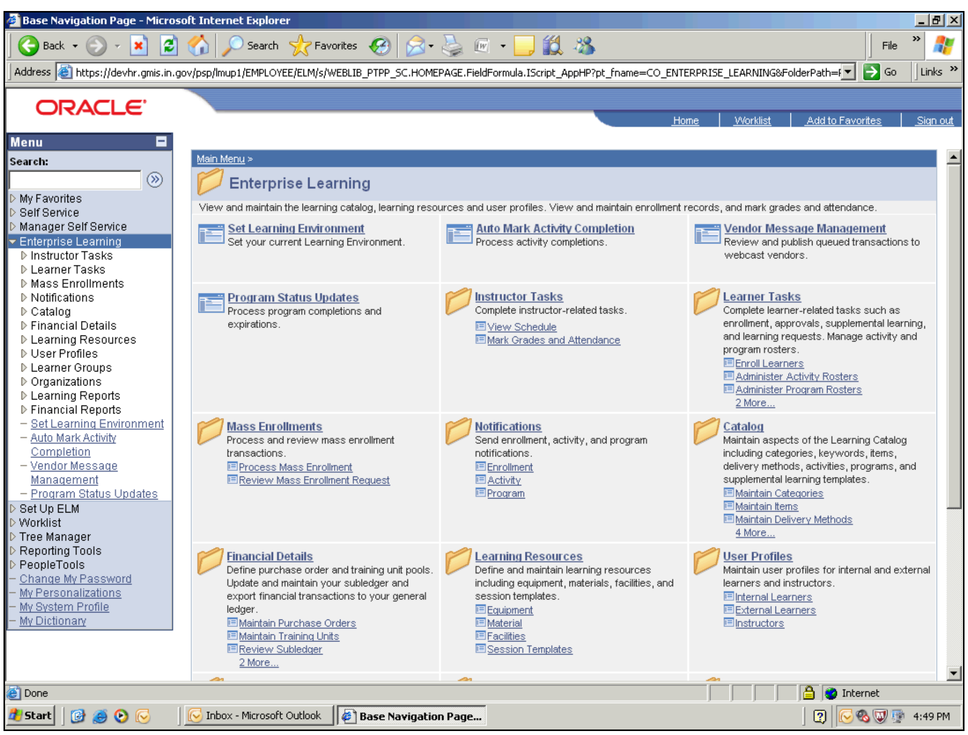
Learner Tasks

How to Enroll Learners

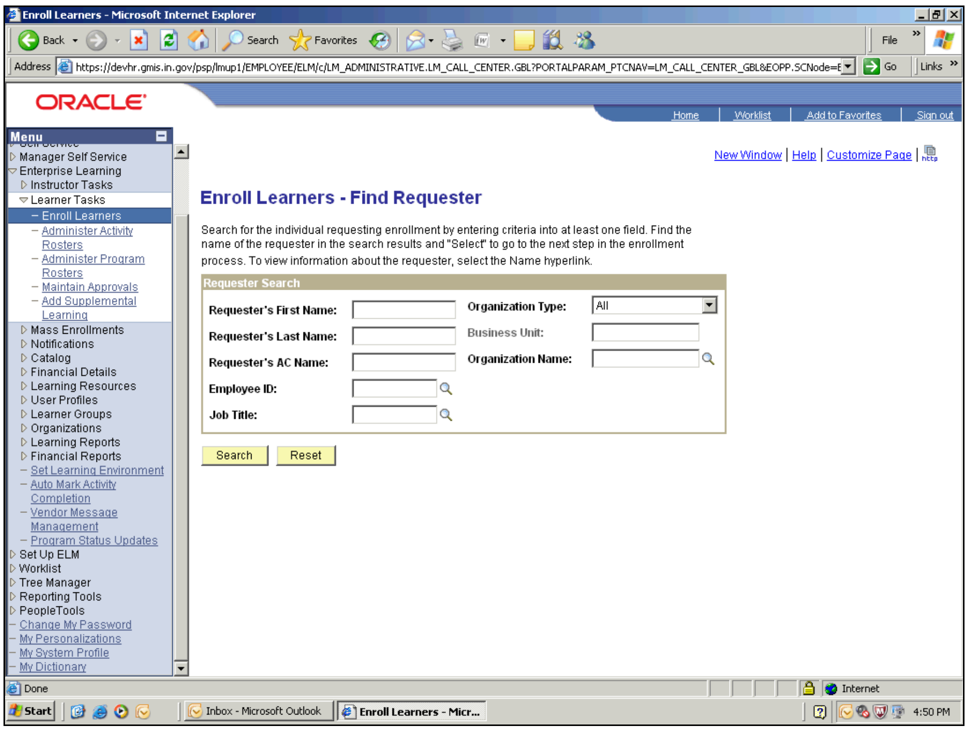
This lesson will teach administrators how to enroll individual learners into activities.



Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



Step	Action
2.	Click the **Learner Tasks** link. Learner Tasks
3.	Click the **Enroll Learners** link. Enroll Learners

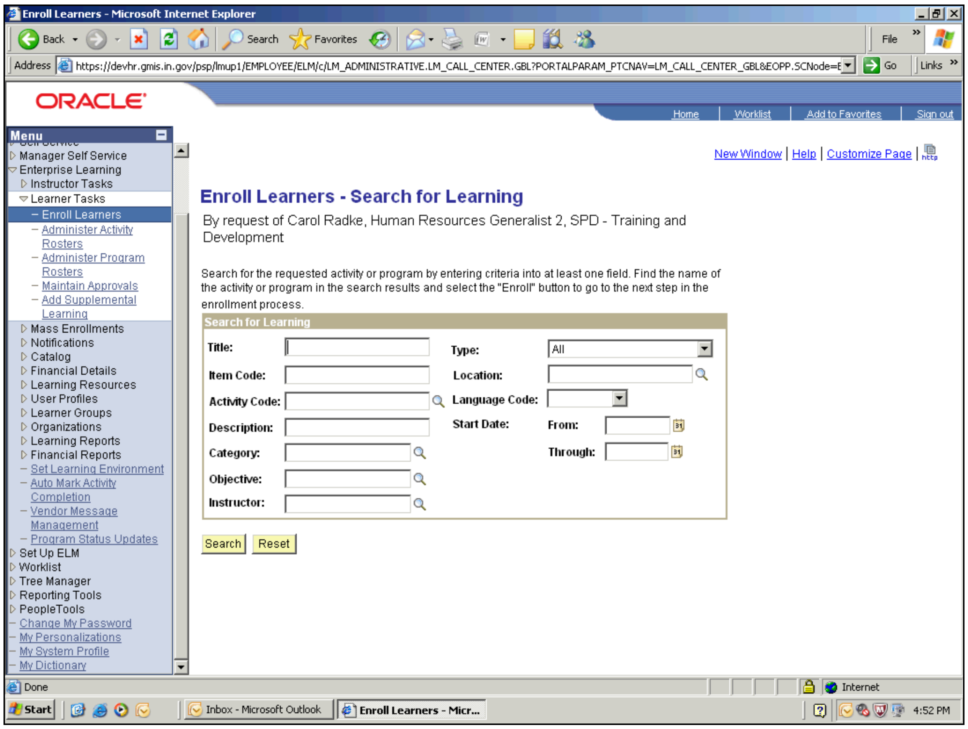


Step	Action
4.	Enter **search criteria** for the enrollment requester.

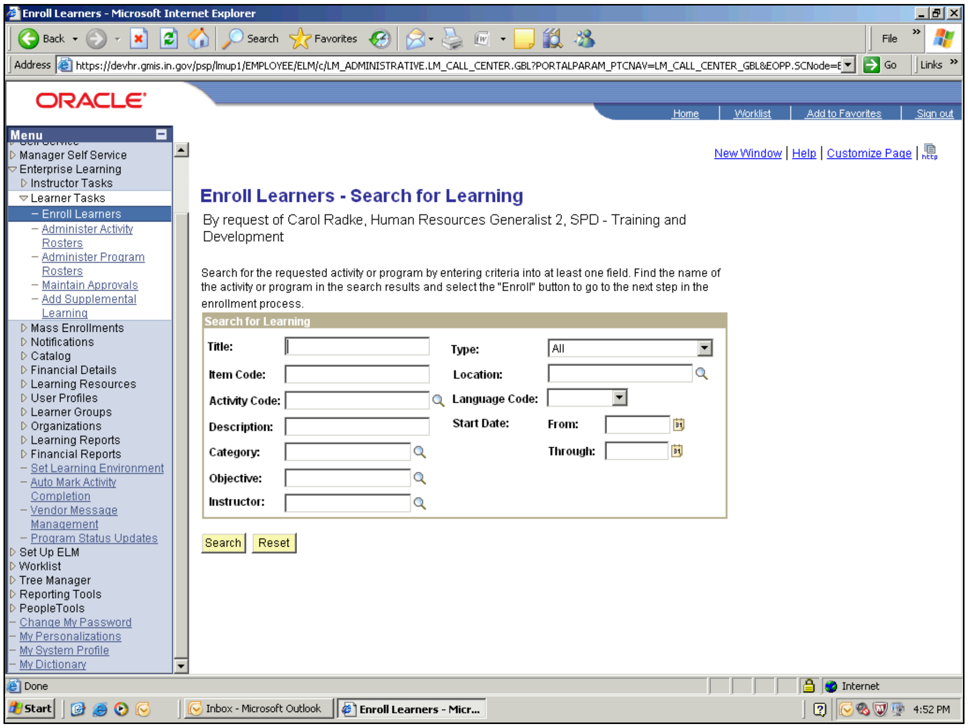
To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

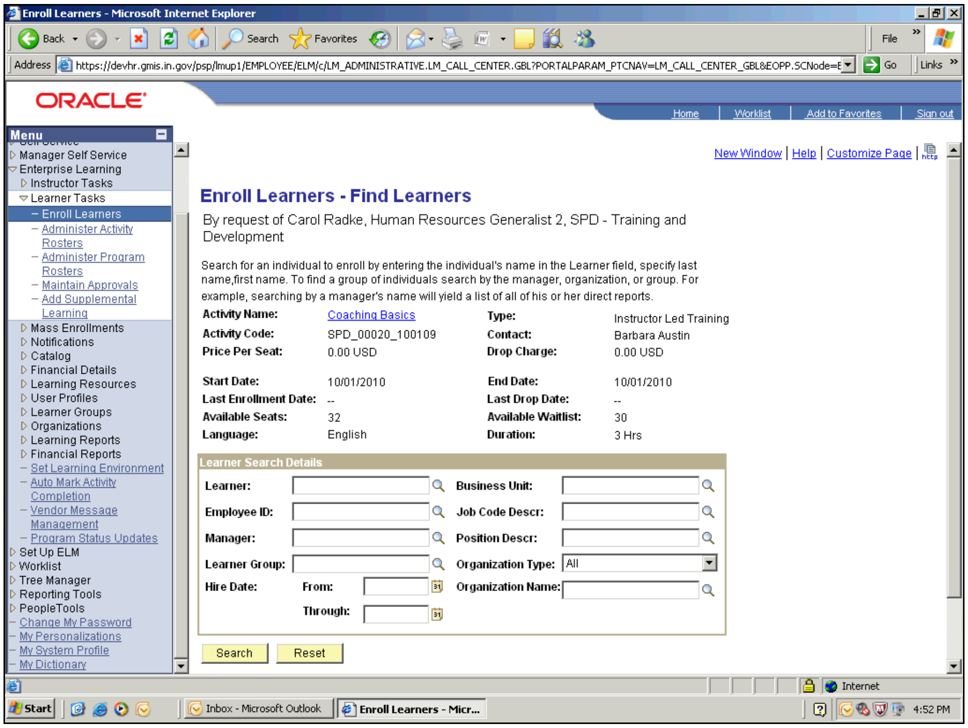
Step	Action
5.	Click the **Search** button. Search
6.	Click the **Select** button to the right of the requester in the **Select Requester** section. Select

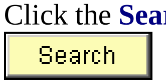


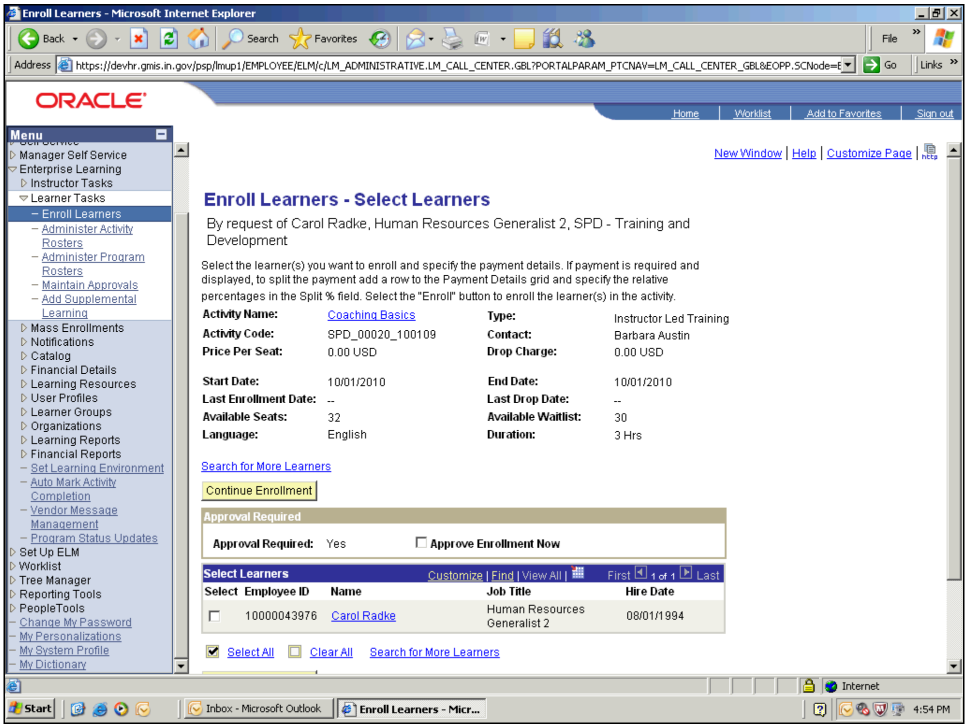
Step	Action
7.	Enter **search criteria** in the **Search for Learning** section, if desired.



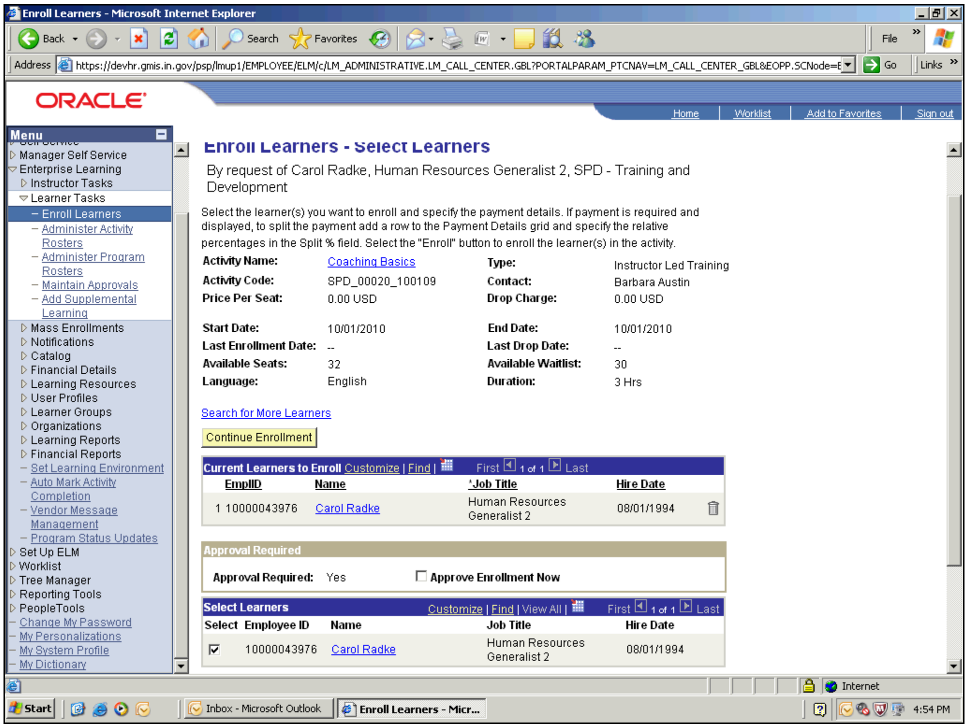
Step	Action
8.	Click the **Search** button. Search
9.	Locate the correct activity in the **Select learning for enrollment** section.
10.	Click the **Enroll** button to the right of the correct activity in the list. Enroll



Step	Action
11.	Enter **search criteria** for the learner to be enrolled into the activity in the **Learner Search Details** section. 
12.	Click the **Search** button. 



Step	Action
13.	Check the checkbox in the **Select** column of the **Select Learners** section to select the learner for enrollment. 

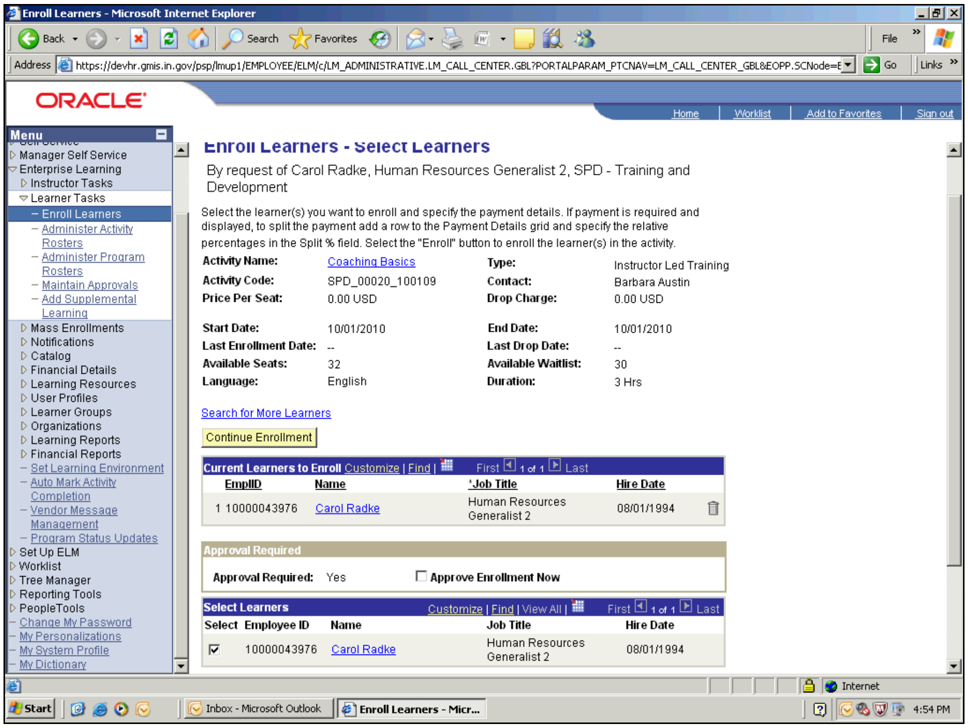


Step	Action
14.	If present, review the **Approval Required** designation in the **Approval Required** section.

The **Approval Required** section displays when manager or administrator approval is needed to enroll in a course and is used to override manager and administrator approvals. An administrator cannot override payment approvals here. Administrators can use the roster component to approve payment approval requests.

The **Approval Required** option displays whether the system requires manager or administrator approval to enroll in the activity.

Check the **Approve Enrollment Now** checkbox to override manager and administrator approvals for all selected learners.

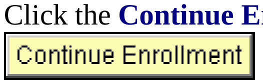


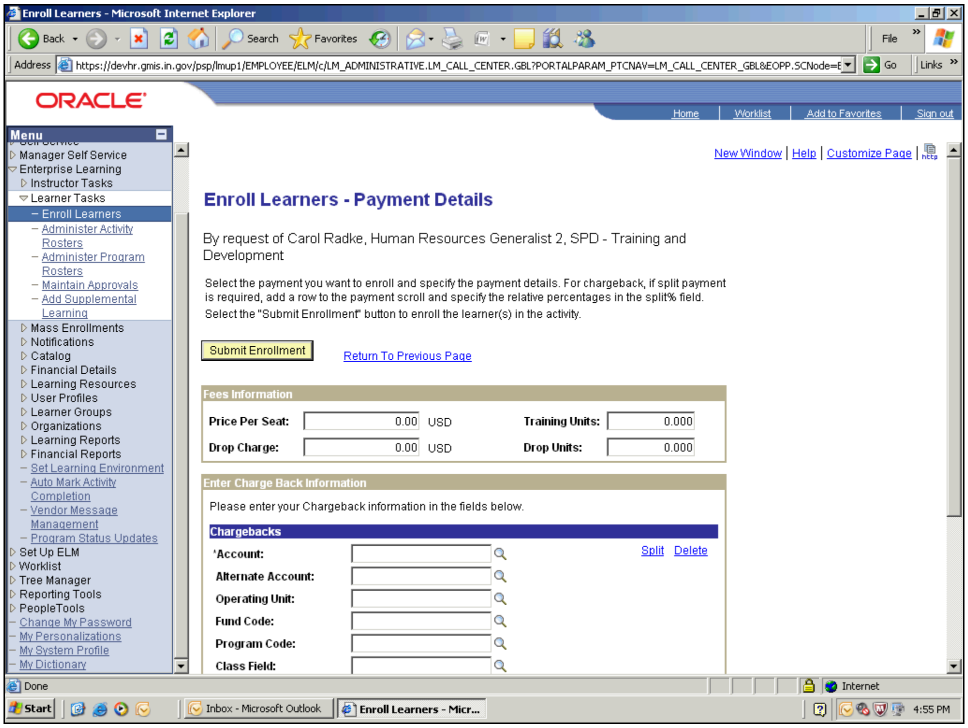
Step	Action
15.	If present, review the **Reserved Seats Available** number in the **Reserved Seats Allowed** section.

The **Reserved Seats Allowed** section displays if reserved seats were defined for the activity on the **Activity Details** page and is used to allow selected learners to use reserved seats as needed. Once a reserved seat is filled, the seat does not revert to reserved status if a learner drops the activity.

The **Reserved Seats Available** option displays the number of available reserved seats.

Enter the number of seats to use in the **Use Reserved Seats** field for selected learners to be enrolled into a reserved seat.

Step	Action
16.	Click the **Continue Enrollment** button. 



Step	Action
17.	Confirm and/or change activity fees information as required in the **Fees Information** section.

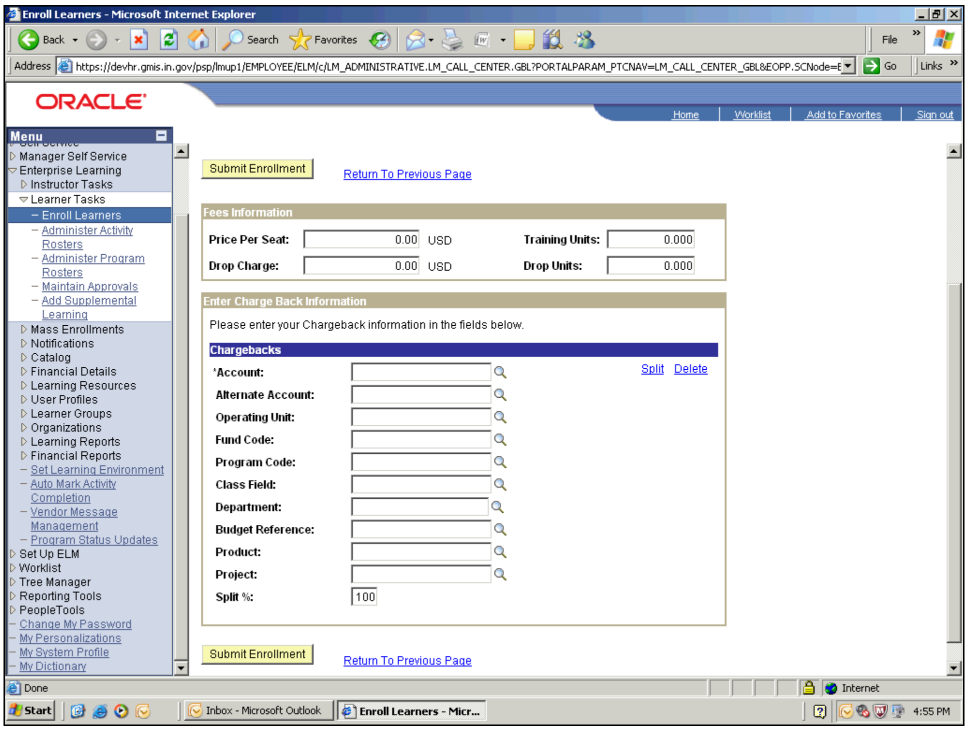
The **Fees Information** fees and drop charges for an activity default from the **Activity Details** page. The section is used to modify activity fees and drop charges for each learner.

***Fees Information* fields include:**

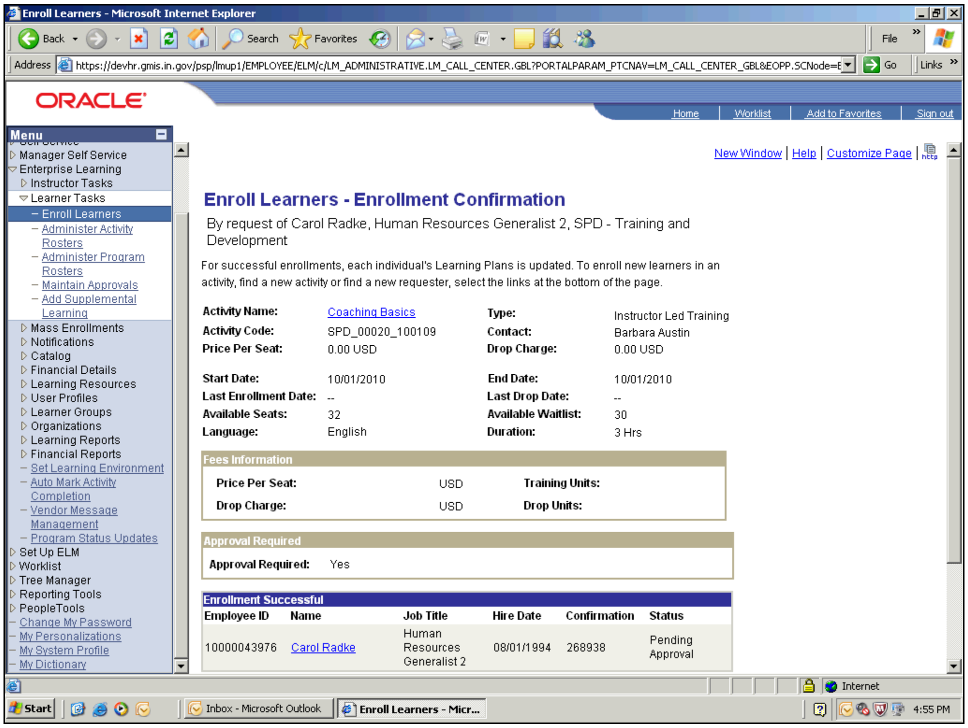
Price Per Seat - A price for the activity.
Drop Charge - A drop charge for the activity.
Training Units - The number of training units to be changed to each learner for the activity.
Drop Units - The number of training units to be charged back to each learner when the activity is dropped.

Step	Action
18.	Confirm and/or change activity chargeback information as required in the **Enter Charge Back Information - Chargebacks** section. 

The **Enter Charge Back Information** section is used to enter chargeback account information. The ChartField values appear by default from the general ledger business unit that is mapped to the PeopleSoft HR business unit the requester belongs to.



Step	Action
19.	Click the **Submit Enrollment** button. Submit Enrollment



Step	Action
20.	Note that the section at the bottom of the page containing the learner's information is titled **Enrollment Successful**.

1. The **Enrollment Successful** section displays all learners for whom enrollment is successful. Successful enrollments include learners with **enrolled**, **waitlisted**, **pending payment**, or **pending approval** statuses.

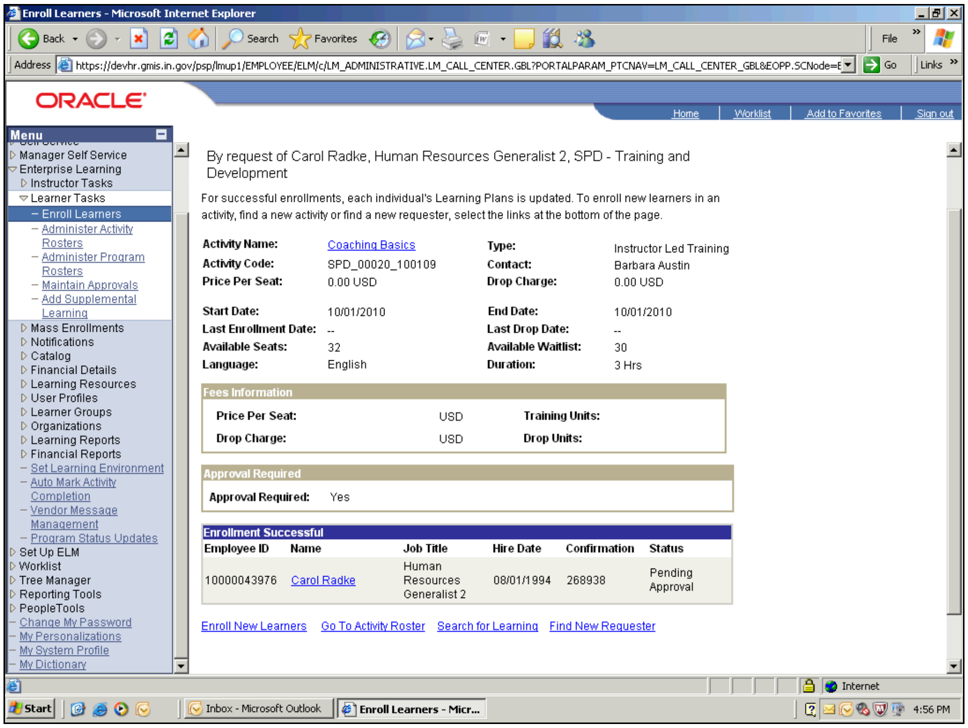
Columns to note within the Enrollment Successful section include:
Confirmation - Displays the confirmation number for the learner. The system uses this number to track the enrollment history and to determine the learner's priority in a user waitlist.
Status - Displays the enrollment status for each learner.

2. The **Enrollment Unsuccessful** section displays all learners for whom enrollment was unsuccessful. Click the **Alerts** link for each learner to see the error conditions that cause the enrollment to fail. To override conditions that are preventing enrollment or registration, select the checkbox for the learner and click the **Submit** button on this page so the system will ignore the condition preventing enrollment.

Administrators **CANNOT** override unsuccessful enrollments when:
- an activity and its waitlist are full
- a duplicate enrollment is detected

Columns to note within the Enrollment Unsuccessful section include:

	Alerts - Accesses the **Alert Details** page to view the condition preventing enrollment for a learner.

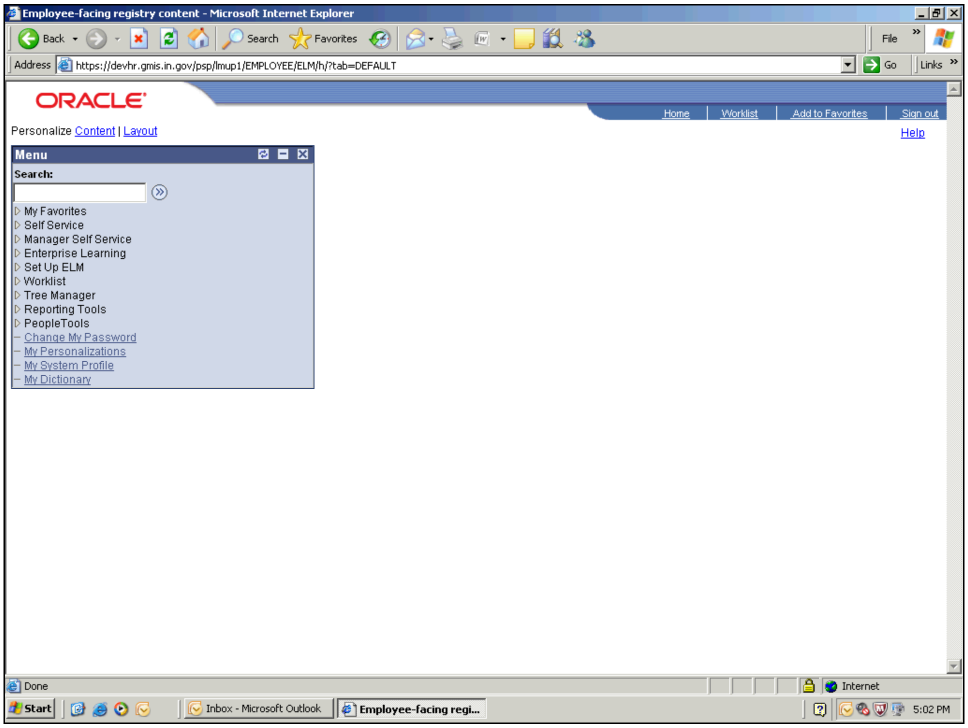


Step	Action
21.	Confirm the status of the enrollment in the **Status** column of the **Enrollment Successful** section.
22.	Congratulations! You have successfully entered an individual enrollment into an activity. **End of Procedure.**

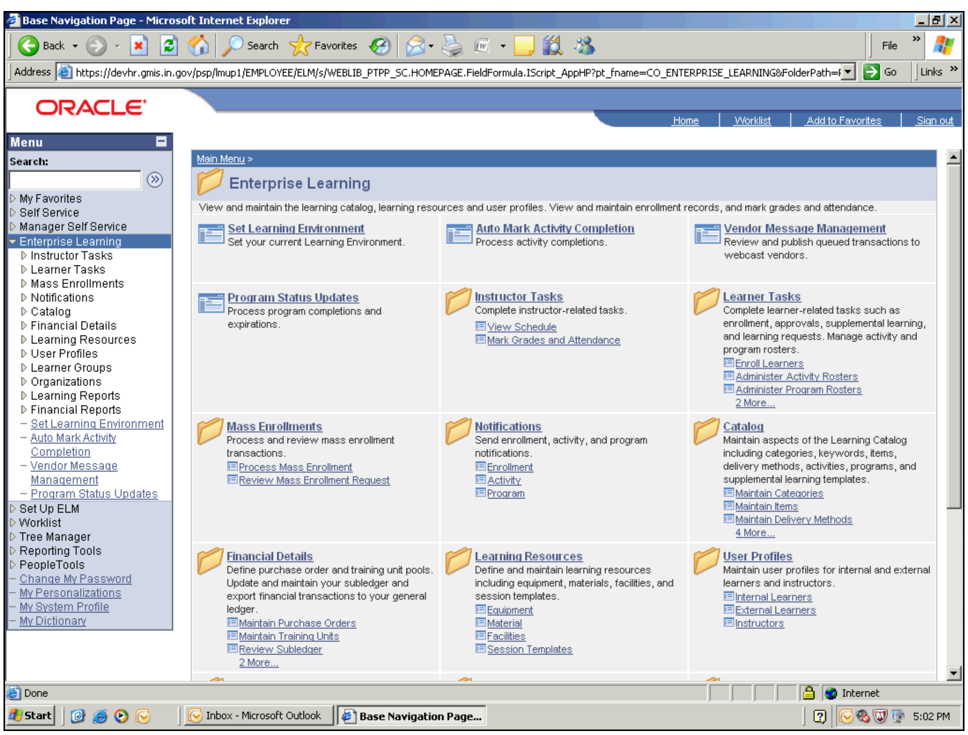
How to Enroll Multiple Learners

Multiple learners consisting of **less than 30 individuals** are considered group enrollments.

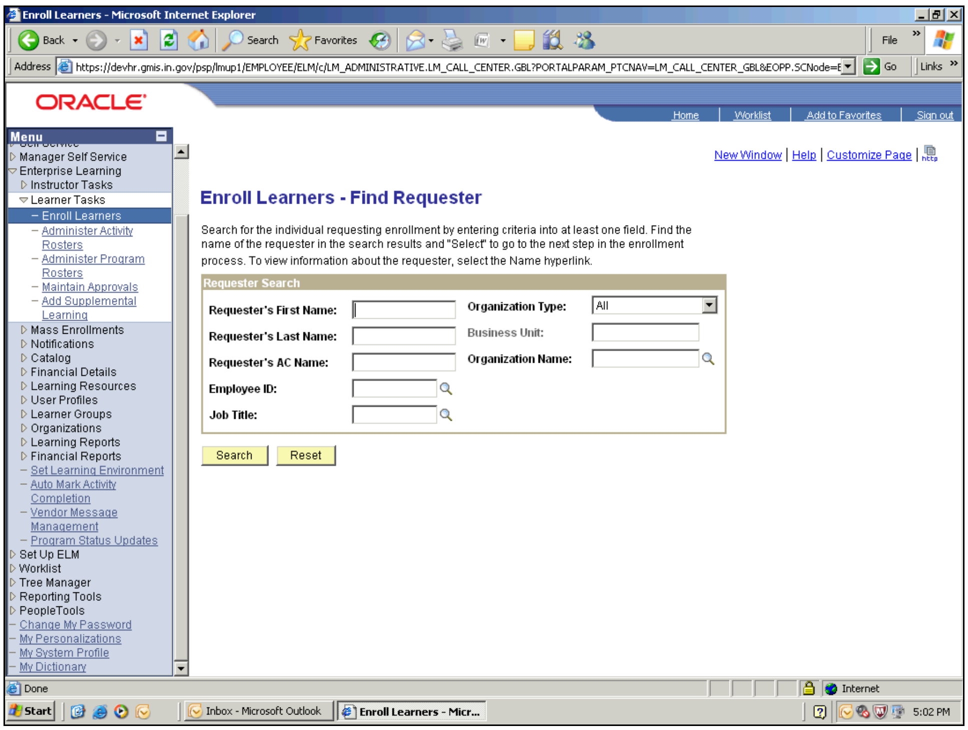
This lesson will teach administrators how to enroll multiple learners into an activity.



Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



Step	Action
2.	Click the **Learner Tasks** link. Learner Tasks
3.	Click the **Enroll Learners** link. Enroll Learners

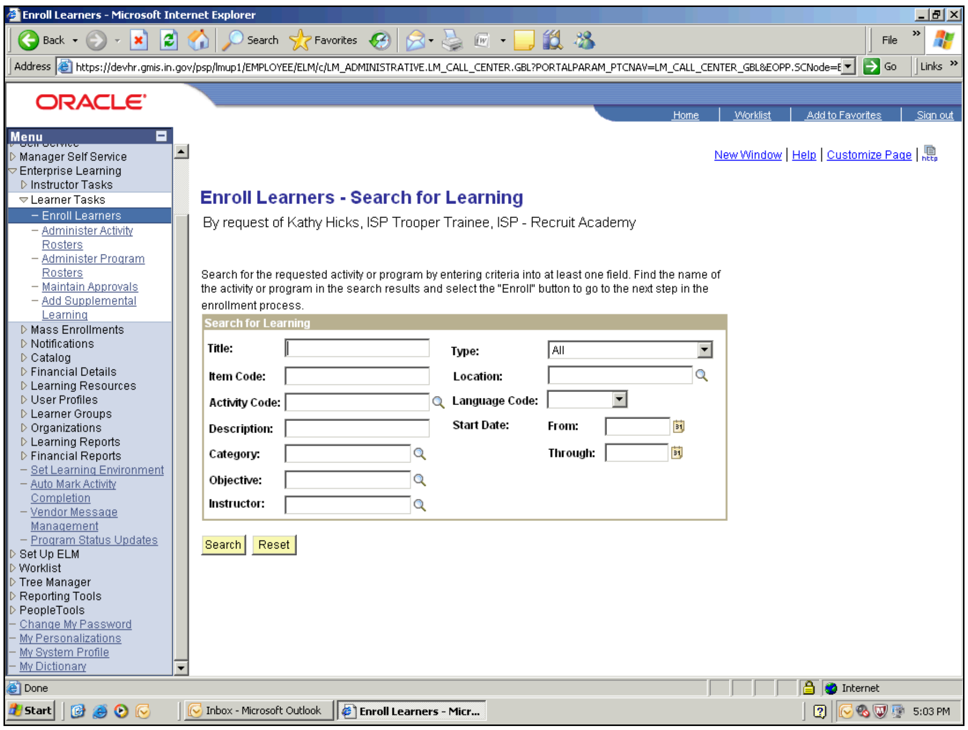


Step	Action
4.	Enter **search criteria** for the enrollment requester.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

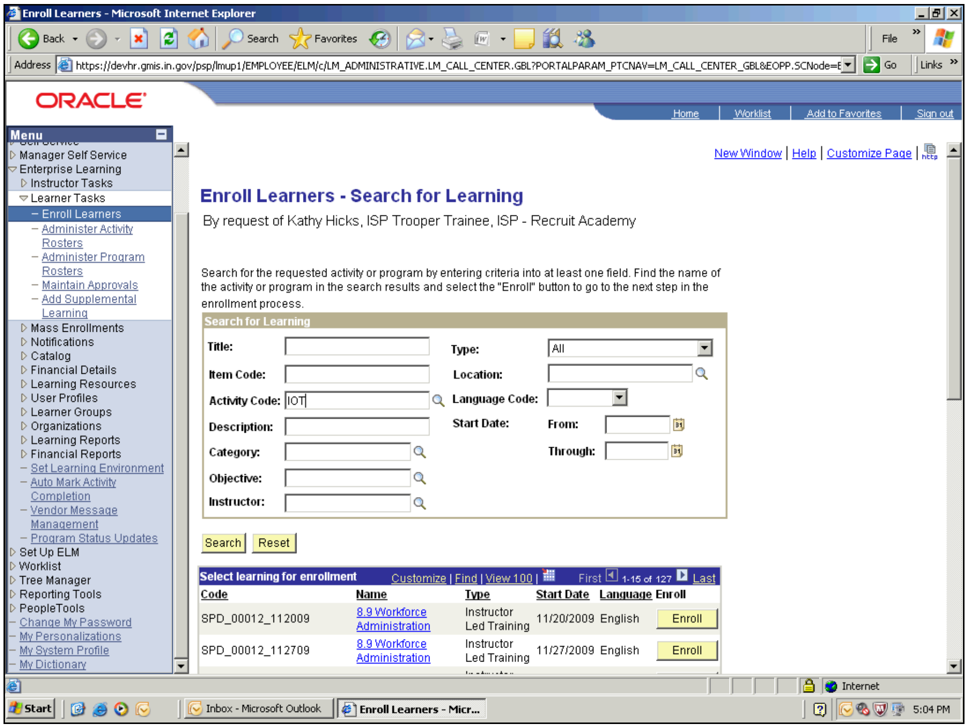
Step	Action
5.	Click the **Search** button. 
6.	Click the **Select** button to the right of the requester in the **Select Requester** section. 



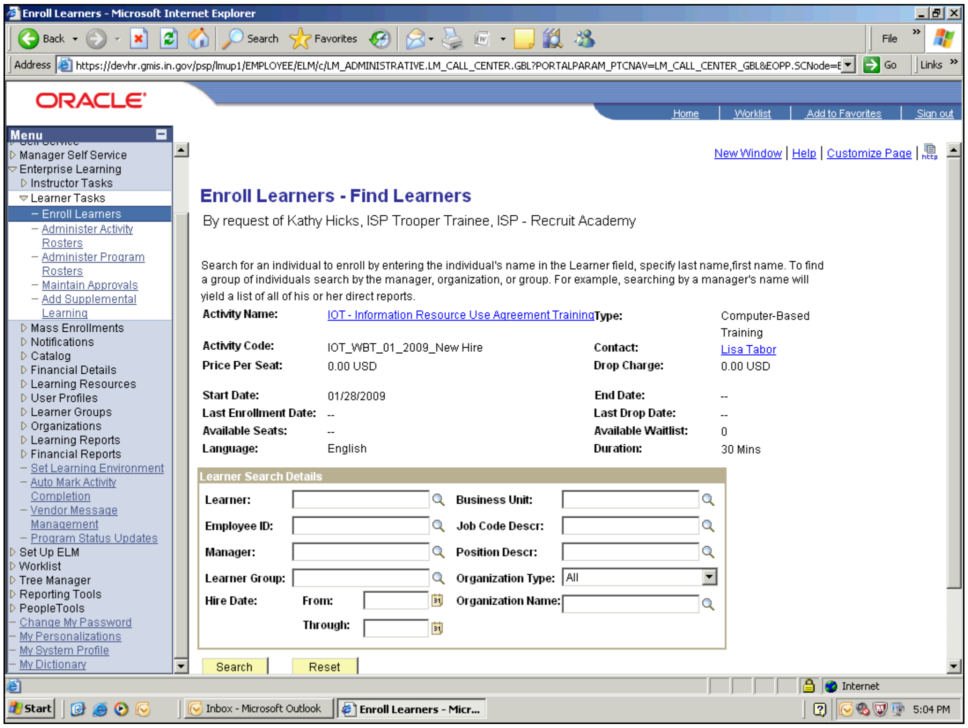
Step	Action
7.	Enter **search criteria** in the **Search for Learning** section, if desired.

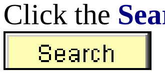
To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

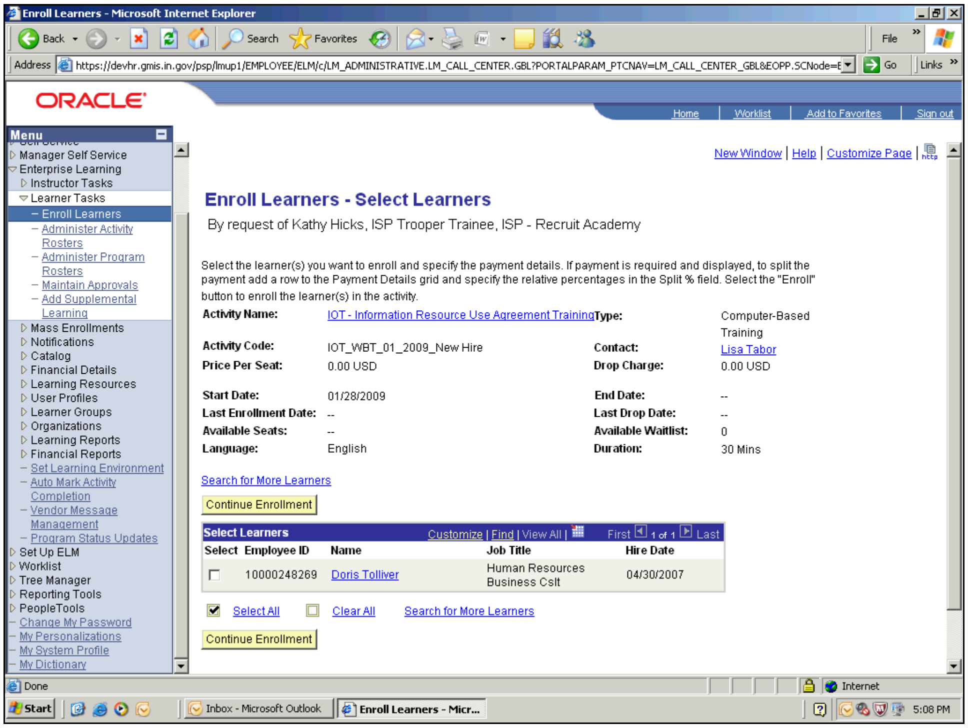
<u>To further define search criteria:</u>
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.



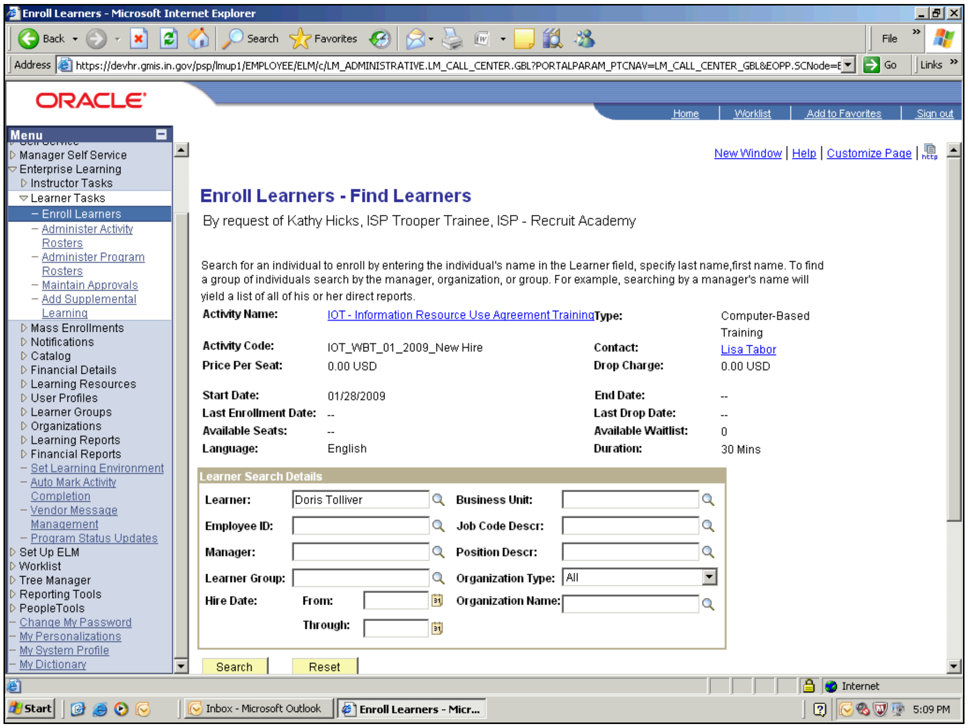
Step	Action
8.	Click the **Search** button. Search
9.	Click the **Enroll** button to the right of the correct activity in the list. Enroll



Step	Action
10.	Enter **search criteria** for the first learner to be enrolled into the activity in the **Learner Search Details** section. 
11.	Click the **Search** button. 



Step	Action
12.	Check the checkbox in the **Select** column of the **Select Learners** section to select the learner for enrollment. 
13.	Click the **Search for More Learners** link. 

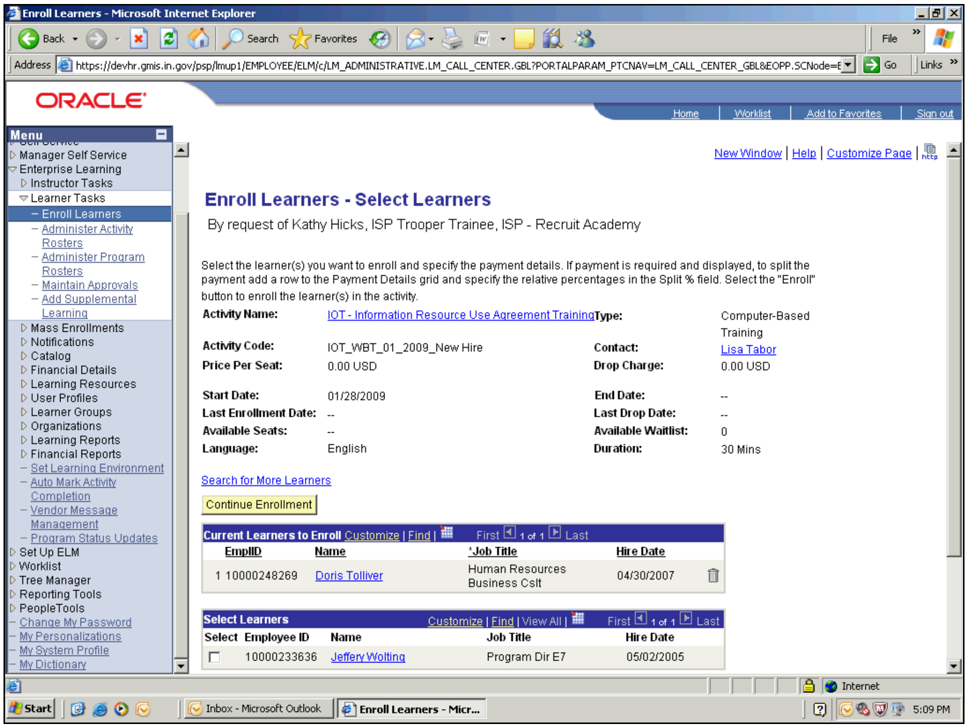


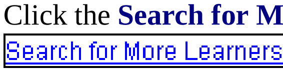
Step	Action
14.	Enter **search criteria** for the second learner to be enrolled into the activity in the **Learner Search Details** section.

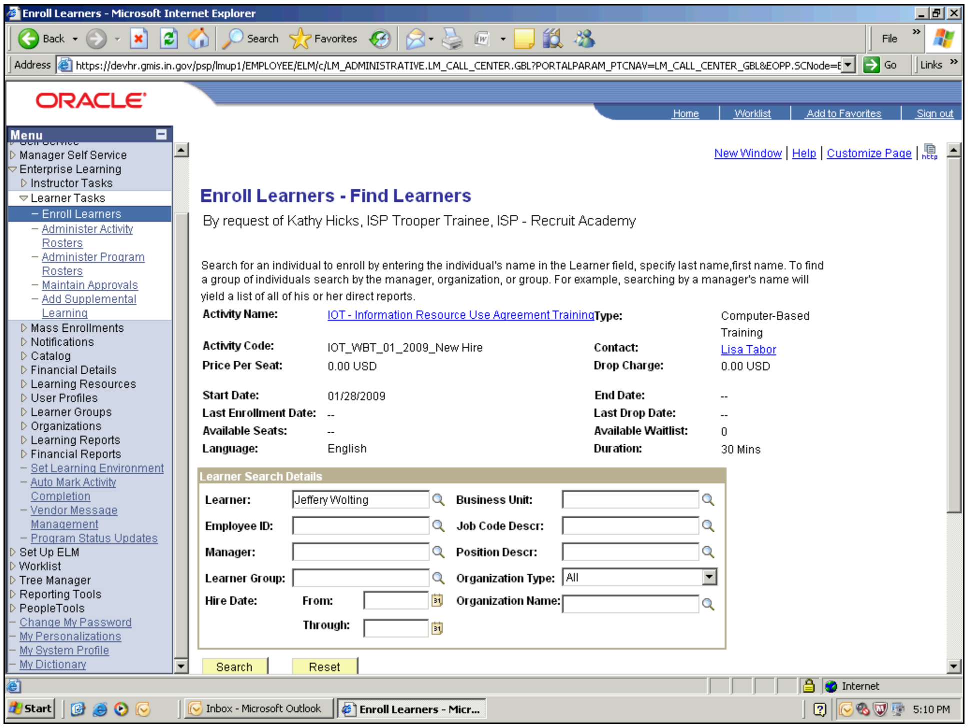
The search criteria used for the previous learner will still be populated in the Learner Search Details section!

Be sure to replace all search criteria used for the previous learner with the search criteria to be used for the next learner.

Step	Action
15.	Click the **Search** button. Search



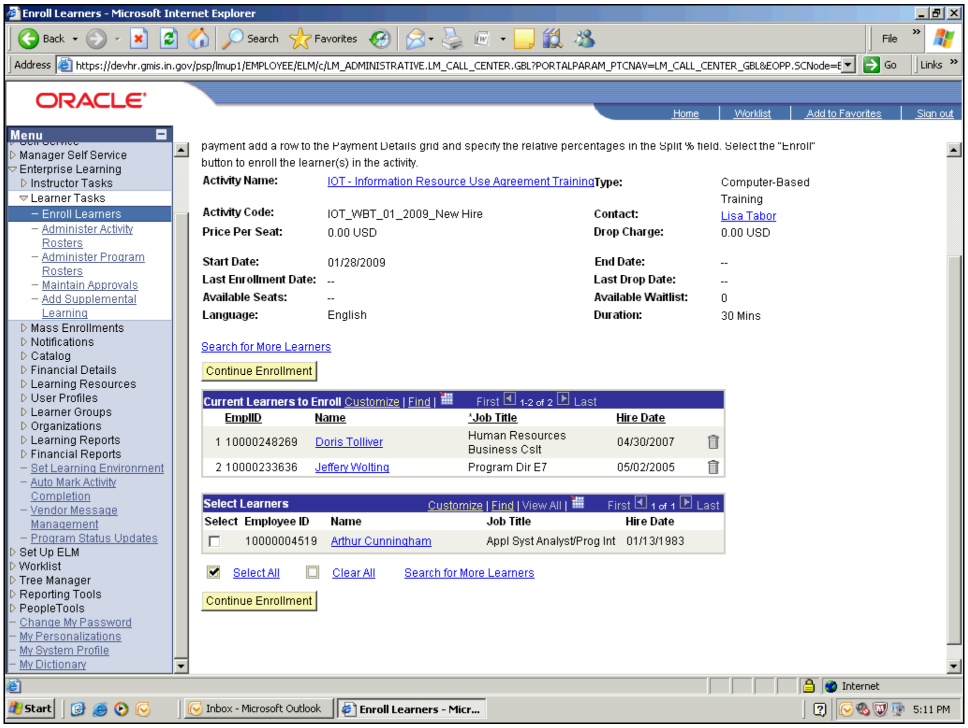
Step	Action
16.	Release the mouse button.
17.	Check the checkbox in the **Select** column of the **Select Learners** section to select the learner for enrollment. 
18.	Click the **Search for More Learners** link. 



Step	Action
19.	Enter **search criteria** for the third learner to be enrolled into the activity in the **Learner Search Details** section. 

The search criteria used for the previous learner will still be populated in the Learner Search Details section!

Be sure to replace all search criteria used for the previous learner with the search criteria to be used for the next learner.



Step	Action
20.	Check the checkbox in the **Select** column of the **Select Learners** section to select the learner for enrollment. Continue searching for and selecting **up to 30 (total of 29)** learners for group enrollment. 30 or more learners will require the completion of the **Mass Enrollment** process.

The **Approval Required** section displays when manager or administrator approval is needed to enroll in a course and is used to override manager and administrator approvals. An administrator cannot override payment approvals here. Administrators can use the roster component to approve payment approval requests.

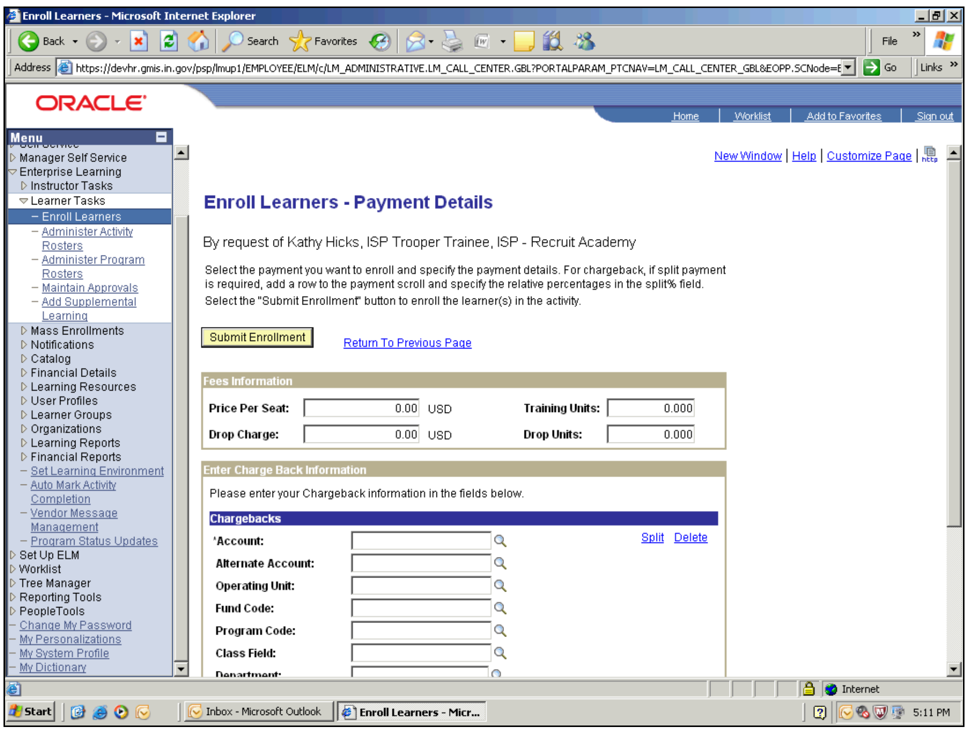
The **Approval Required** option displays whether the system requires manager or administrator approval to enroll in the activity.

Check the **Approve Enrollment Now** checkbox to override manager and administrator approvals for all selected learners.

The **Reserved Seats Allowed** section displays if reserved seats were defined for the activity on the **Activity Details** page and is used to allow selected learners to use reserved seats as needed. Once a reserved seat is filled, the seat does not revert to reserved status if a learner drops the activity.

	The **Reserved Seats Available** option displays the number of available reserved seats. Enter the number of seats to use in the **Use Reserved Seats** field for selected learners to be enrolled into a reserved seat.

Step	Action
21.	When finished selecting learners, click the **Continue Enrollment** button. Continue Enrollment



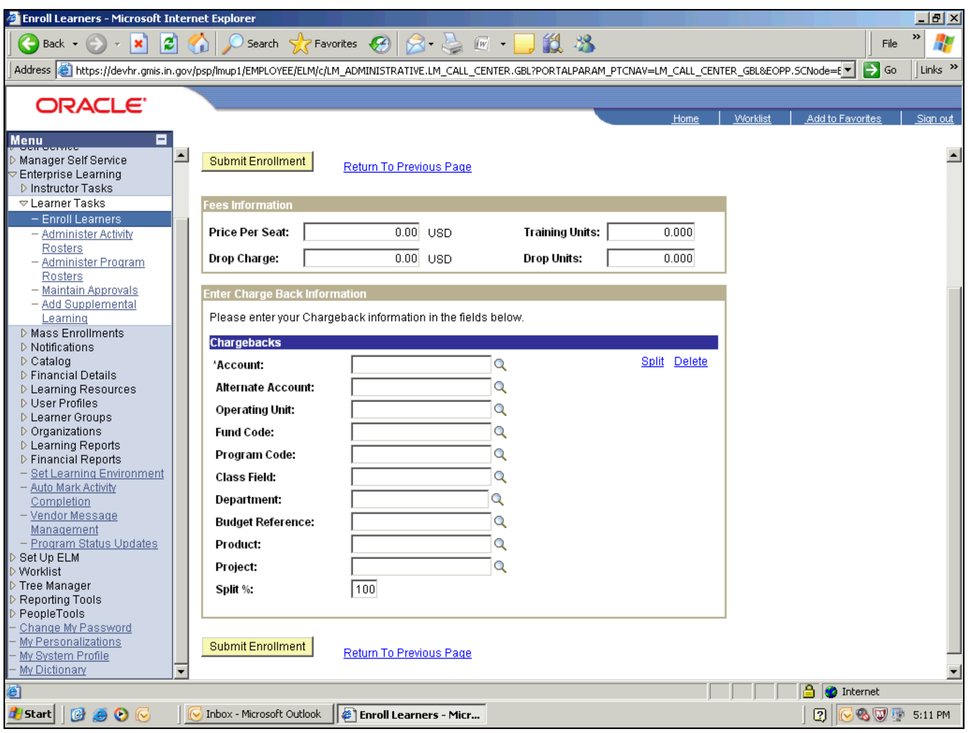
Step	Action
22.	Confirm and/or change activity fees information as required in the **Fees Information** section. Fees Information

	The **Fees Information** fees and drop charges for an activity default from the **Activity Details** page. The section is used to modify activity fees and drop charges for each learner. ***Fees Information* fields include:**

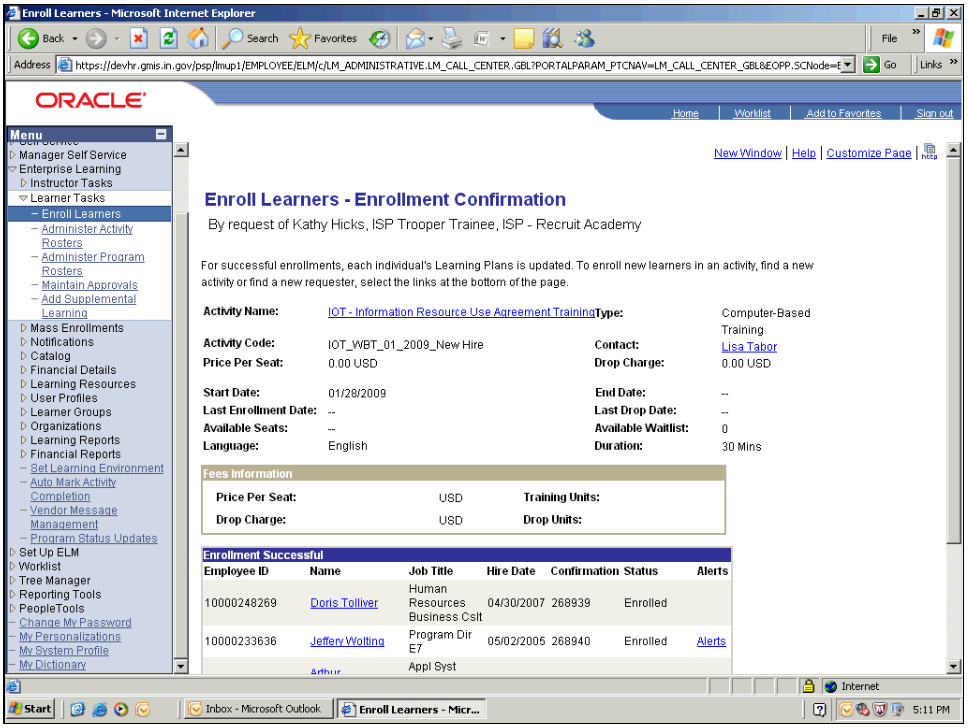
Price Per Seat - A price for the activity.
Drop Charge - A drop charge for the activity.
Training Units - The number of training units to be changed to each learner for the activity.
Drop Units - The number of training units to be charged back to each learner when the activity is dropped.

Step	Action
23.	Confirm and/or change activity chargeback information as required in the **Enter Charge Back Information - Chargebacks** section. Enter Charge Back Information

The **Enter Charge Back Information** section is used to enter chargeback account information. The ChartField values appear by default from the general ledger business unit that is mapped to the PeopleSoft HR business unit the requester belongs to.



Step	Action
24.	Click the **Submit Enrollment** button. Submit Enrollment



Step	Action
25.	Note that the section at the bottom of the page containing the learner's information is titled **Enrollment Successful**.

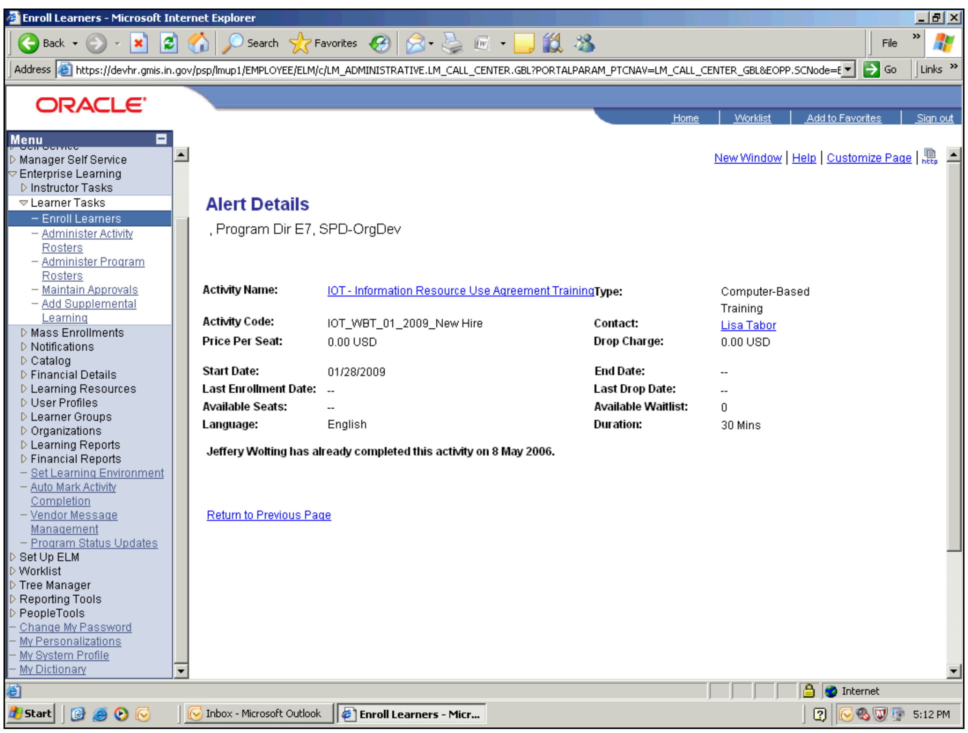
1. The **Enrollment Successful** section displays all learners for whom enrollment is successful. Successful enrollments include learners with **enrolled**, **waitlisted**, **pending payment**, or **pending approval** statuses.

Columns to note within the Enrollment Successful section include:
Confirmation - Displays the confirmation number for the learner. The system uses this number to track the enrollment history and to determine the learner's priority in a user waitlist.
Status - Displays the enrollment status for each learner.

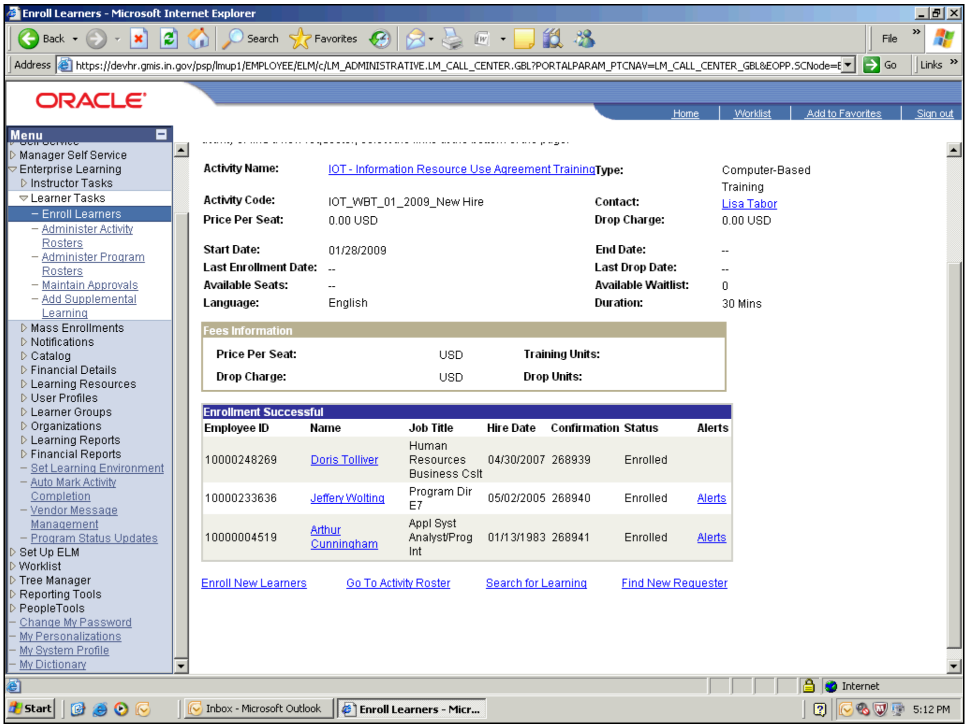
2. The **Enrollment Unsuccessful** section displays all learners for whom enrollment was unsuccessful. Click the **Alerts** link for each learner to see the error conditions that cause the enrollment to fail. To override conditions that are preventing enrollment or registration, select the checkbox for the learner and click the **Submit**

	button on this page so the system will ignore the condition preventing enrollment. Administrators **CANNOT** override unsuccessful enrollments when: - an activity and its waitlist are full - a duplicate enrollment is detected ***<u>Columns to note within the Enrollment Unsuccessful section include:</u>*** **Alerts** - Accesses the **Alert Details** page to view the condition preventing enrollment for a learner.

Step	Action
26.	Click any **Alerts** links appearing in the **Alerts** column to access the **Alert Details** page and view the condition preventing enrollment for a learner. Alerts



Step	Action
27.	Upon reviewing any enrollment alerts to determine the appropriate action, click the **Return to Previous Page** link. Return to Previous Page



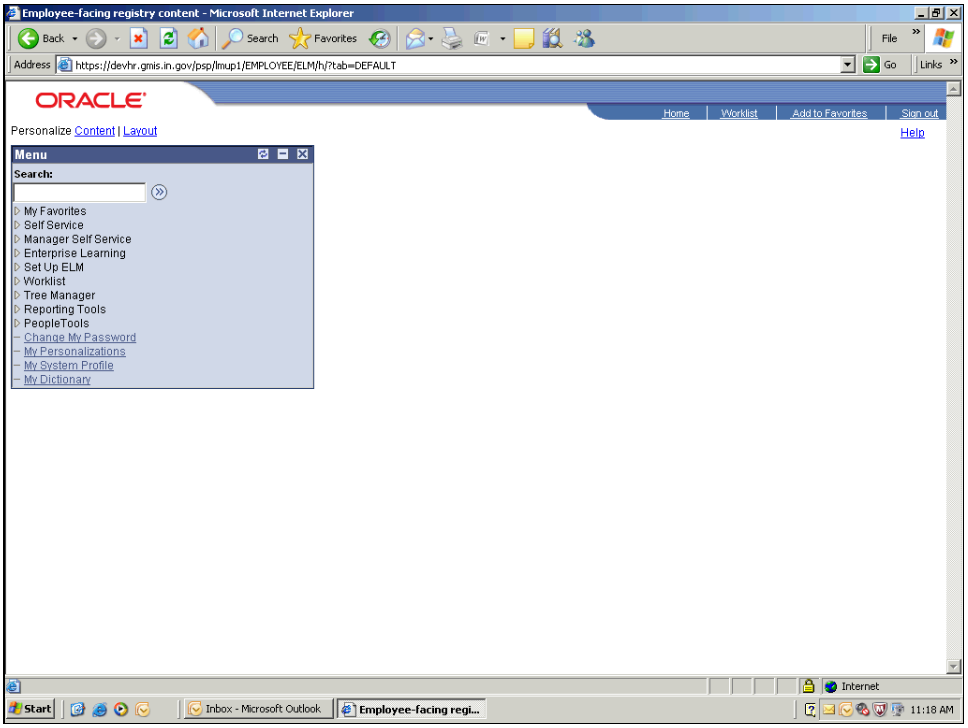
Step	Action
28.	To correct learner enrollments based on alert information, click the **Go To Activity Roster** link to utilize the activity roster for corrections. Go To Activity Roster
29.	Congratulations! You have successfully enrolled multiple (a group of less than 30) learners into an activity. **End of Procedure.**

How to Administer Activity Rosters

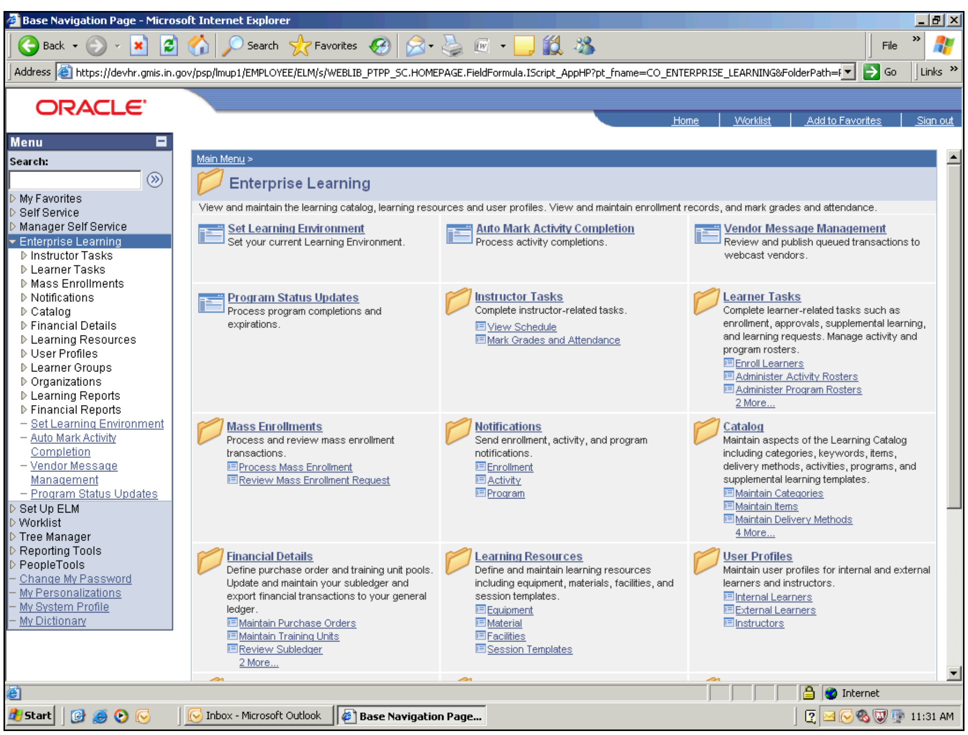
Administrators can use the ***Administer Activity Roster*** component to search for and access any activity roster within their learning environments. Using the rosters, they can approve enrollment requests, manage waitlists, drop learners, and update payment details on a learner's enrollment record. Tasks that are performed by changing a learner's enrollment status, such as dropping a learner or approving enrollment depend on the learner's current enrollment status and the permission lists that are assigned to the administrator. Administrators can update the registration status of an individual learner or use a group action to update multiple learners simultaneously. They can also use the group action feature to send ad hoc email notifications to learners.

The ***Administer Activity Roster*** component can also be used to view and update learners' grades, attendance, and scores. These tasks are discussed in the *Instructor Tasks* section of this guide.

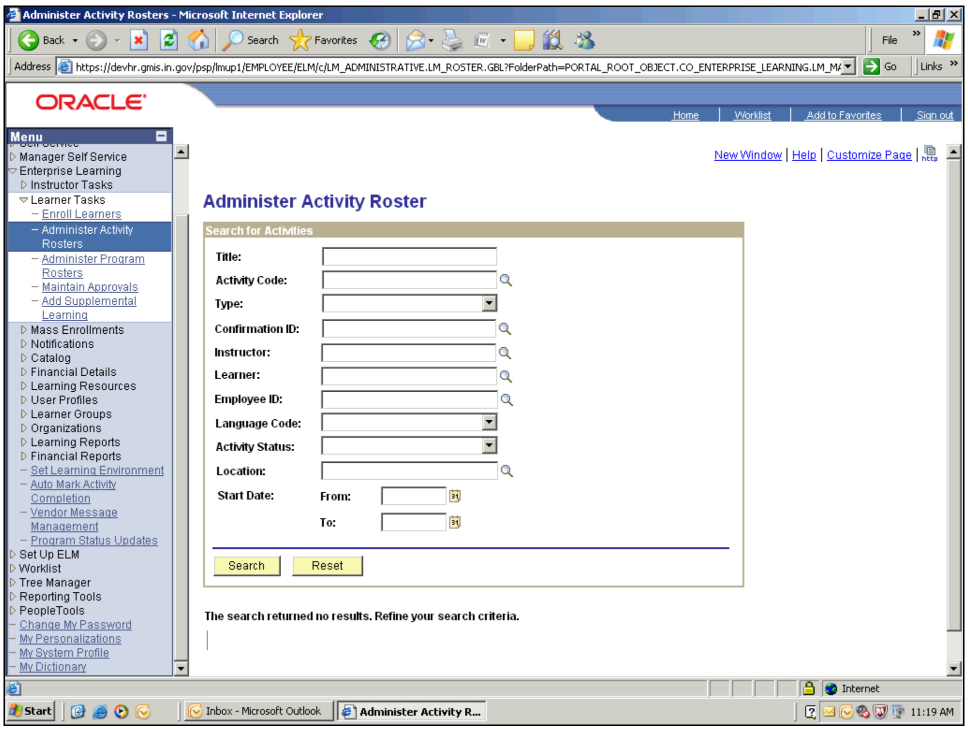
This lesson will teach administrators how to search for and access activity rosters to updates a learner's activity status.



Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



Step	Action
2.	Click the **Learner Tasks** link. Learner Tasks
3.	Click the **Administer Activity Rosters** link. Administer Activity Rosters



Step	Action
4.	Enter **search criteria** for the activity roster to be reviewed and/or updated. 

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

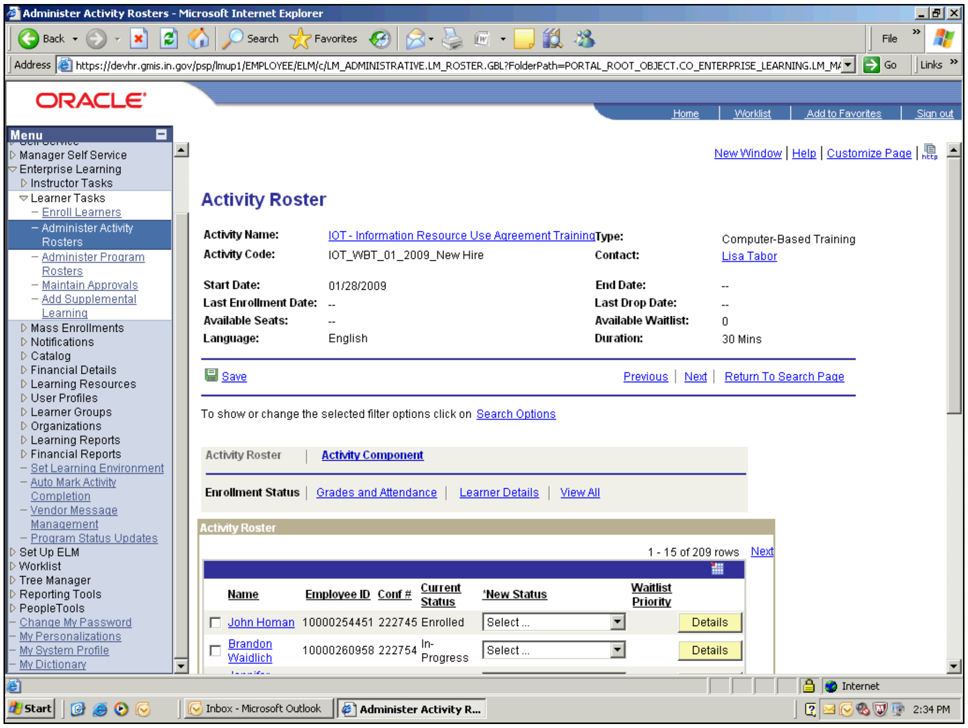
To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Step	Action
5.	Click the **Look Up** button. Look Up
6.	Select the correct activity code from the list of values. IOT_WBT_01_2009_New Hire
7.	Click the **Search** button. Search

The differences in search options on the **Administer Activity Roster - Search for Activities** page are:

• To view the entire list of learners for **one activity**, search using the **Title** or **Activity Code** fields.
• To view the entire list of activities assigned to **one learner**, search using the **Learner** or **Employee ID** fields.

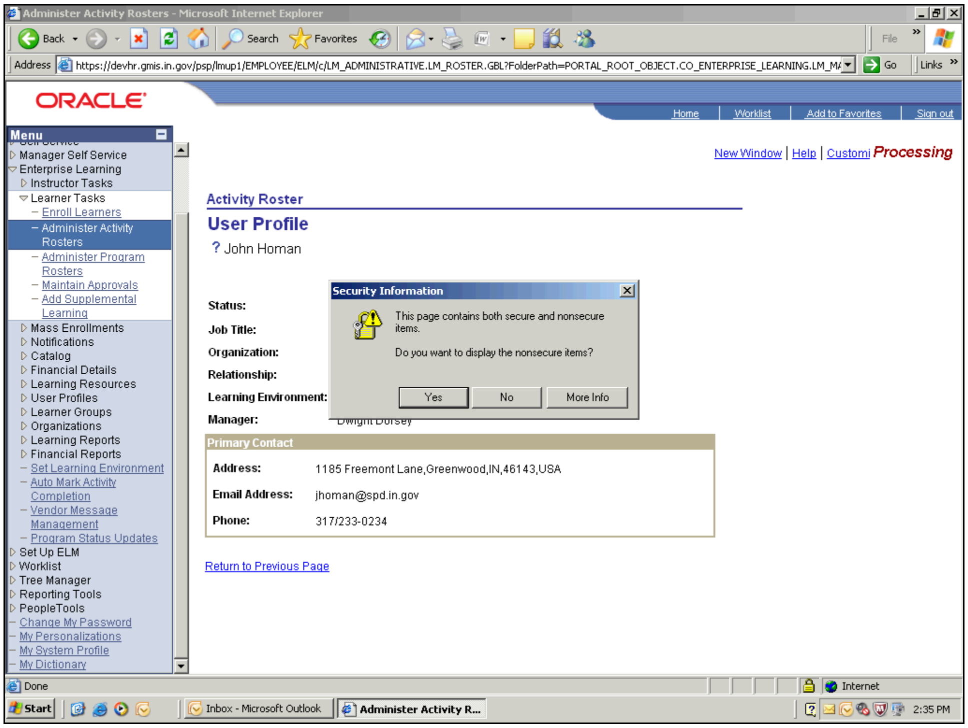
Step	Action
8.	Click the **Roster** button to the right of the activity to be reviewed/updated listed in the **Title** column of the **Learning Activities** section. Roster

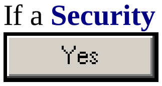


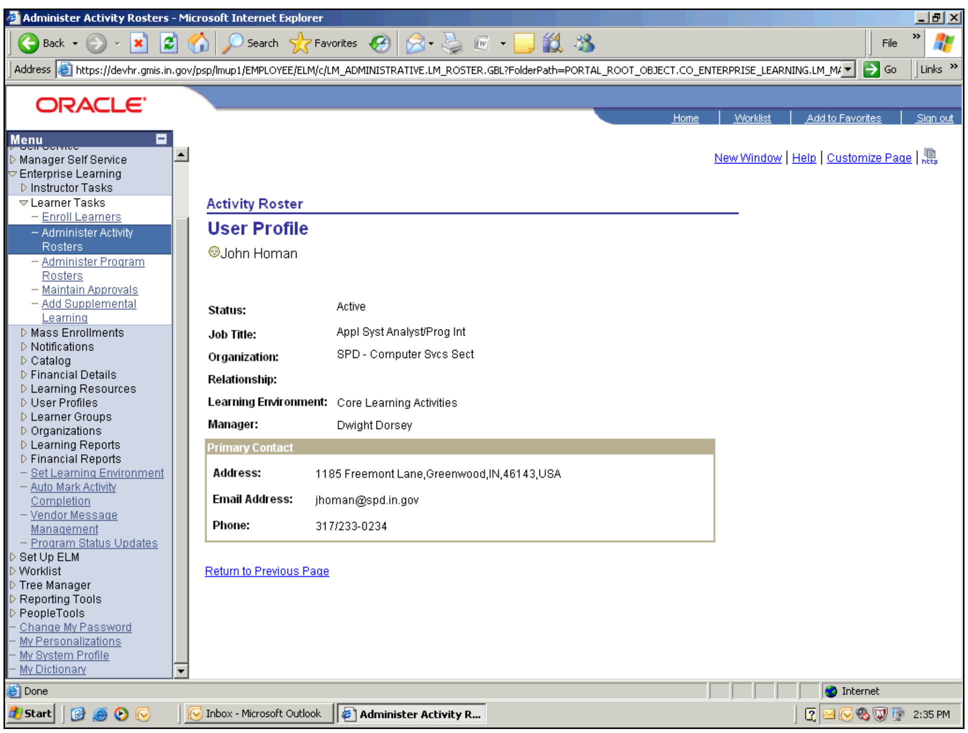
Step	Action
9.	The system defaults to display the **Activity Roster - Enrollment Status** search results in a list. The list is in the **Activity Roster** section of the page.

	The **Activity Roster** section list may return more learners than can be viewed on one page. Use the **Next** link in the upper-right-hand corner of the **Activity Roster** section to move through the list of learners.

Step	Action
10.	Click a learner's name link in the **Name** column to access the **User Profile** page. John Homan



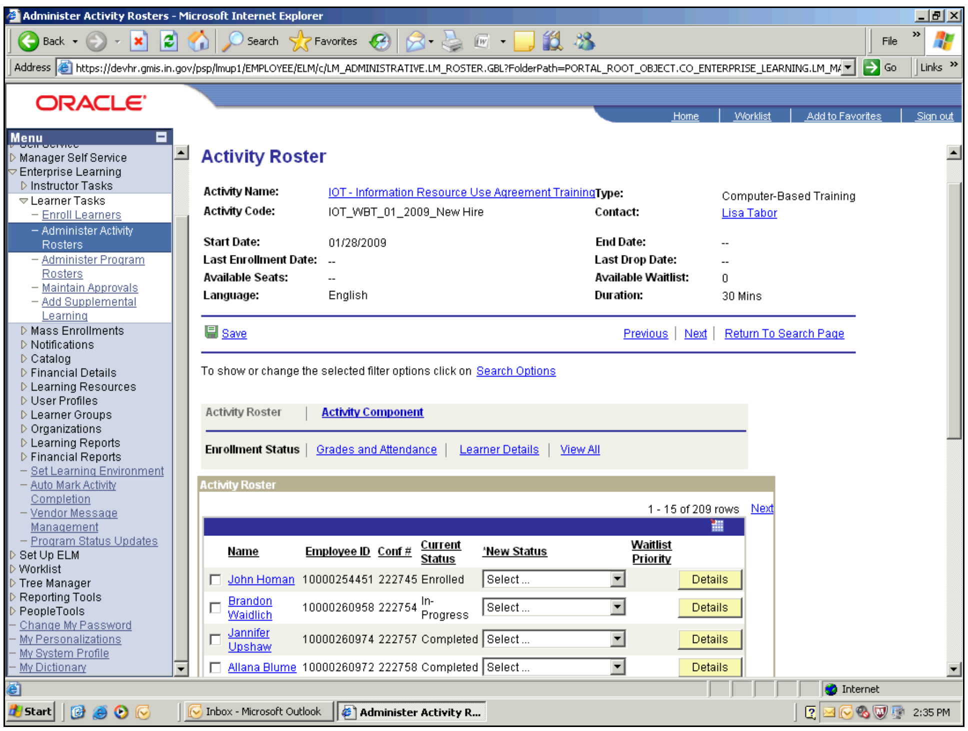
Step	Action
11.	If a **Security Information** warning is received, click the **Yes** button. 



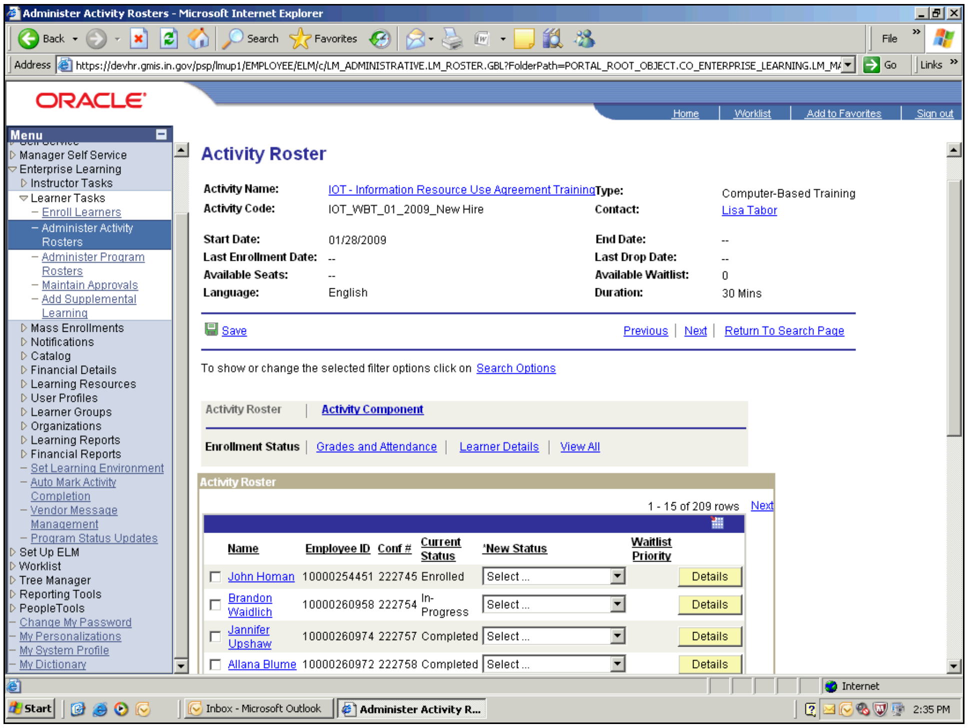
Step	Action
12.	After reviewing the user profile information, click the **Return to Previous Page** link. Return to Previous Page

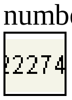
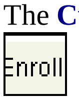
The **User Profile** displays high-level job and contact information about the learner.

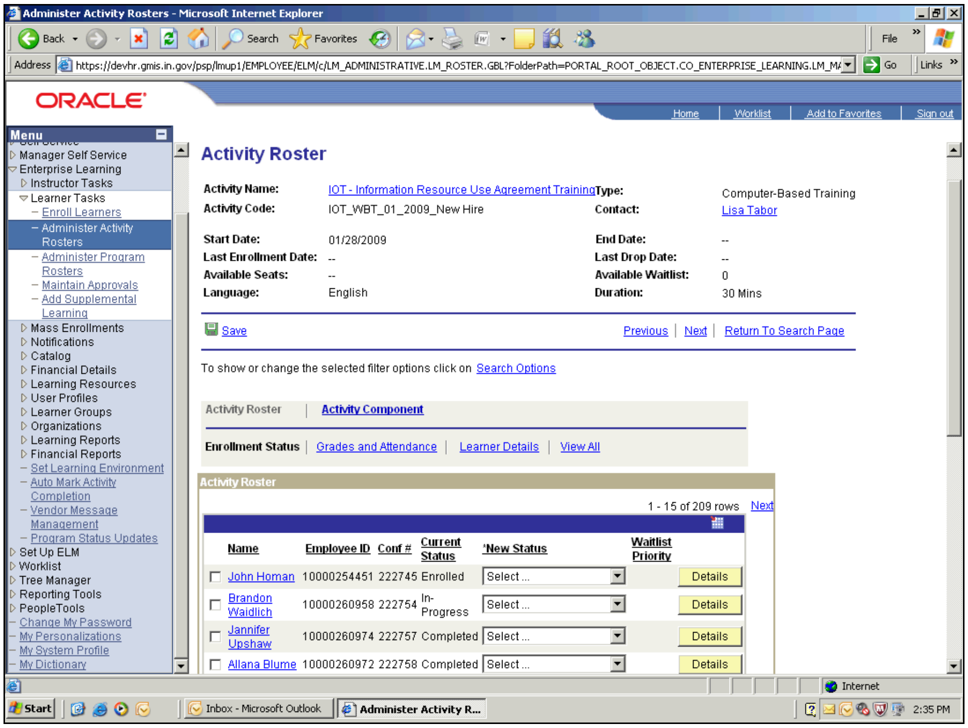
This information may be useful to confirm a learner's job title if catalog administrator approval is needed for training specific to a job title or employment level (such as supervisor or manager only).



Step	Action
13.	The **Employee ID** column display's each learner's **PeopleSoft HR Employee ID** number (this number may also be referenced as the **PeopleSoft ID** number or **User ID** by system users). 00025



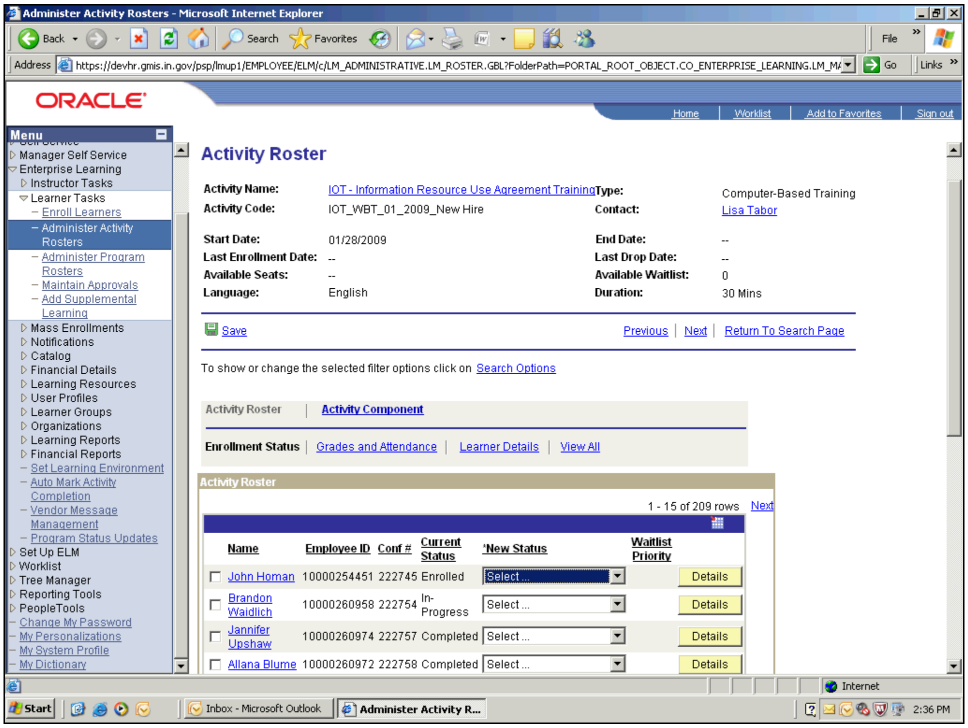
Step	Action
14.	The **Conf #** column displays the enrollment confirmation number for the learner. This number was assigned by the system during the enrollment process. 
15.	The **Current Status** column displays a learner's current enrollment status for the activity. 



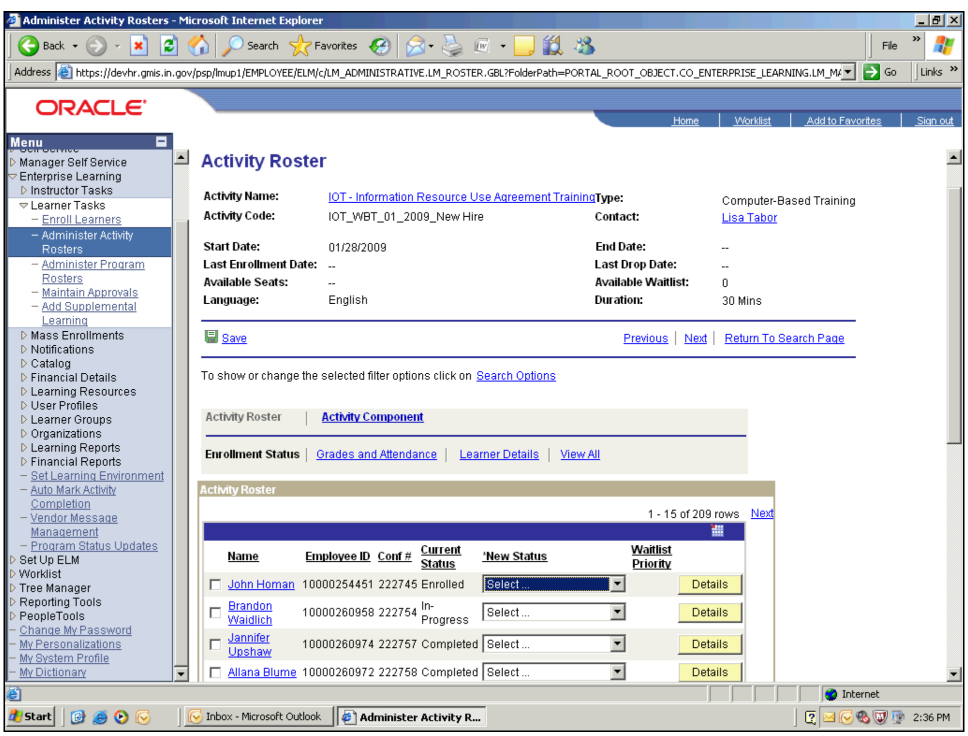
Step	Action
16.	Click the **New Status** drop-down menu button to change an individual learner's status to **Dropped** for learner's to be removed from an activity. 

	Multiple learners may be selected to perform a single action by checking the checkboxes of the left of learner's names in the **Name** column. For example, to change an activity status for multiple learners to the same status at the same time, check the checkbox for each learner whose status is to be changed.

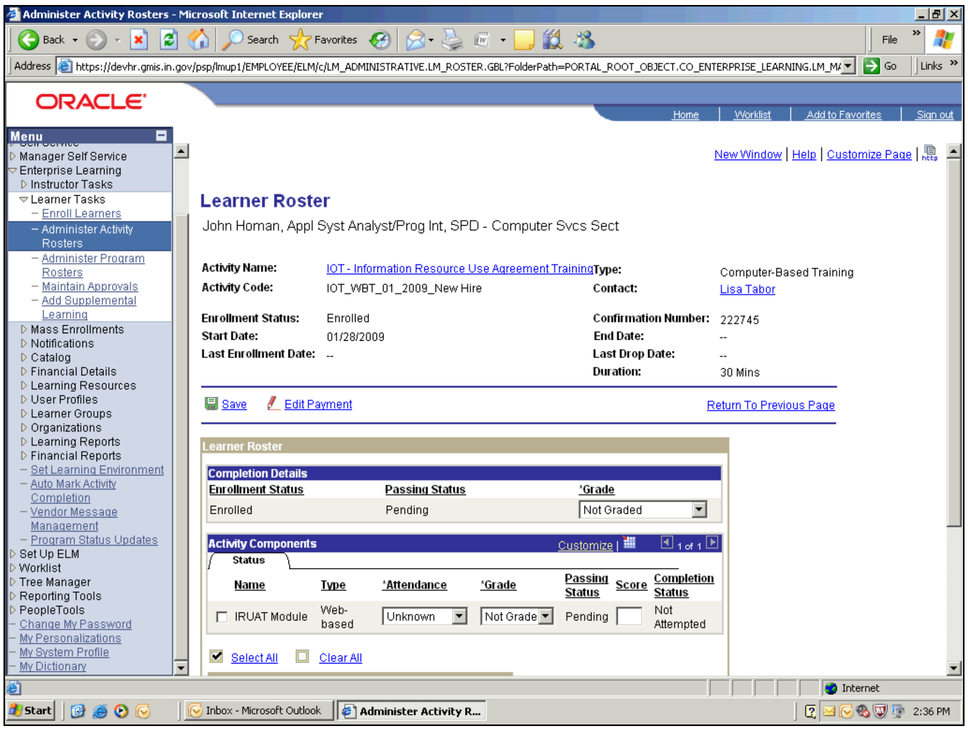
	After checking the checkboxes of the individual learners to process an action for multiple learners, locate the **Group Actions** drop-down menu button to select the action to be processed from the list of values (**Group Action** lists are often located at the bottom of the page). Then, click the **Go** button to complete the process.



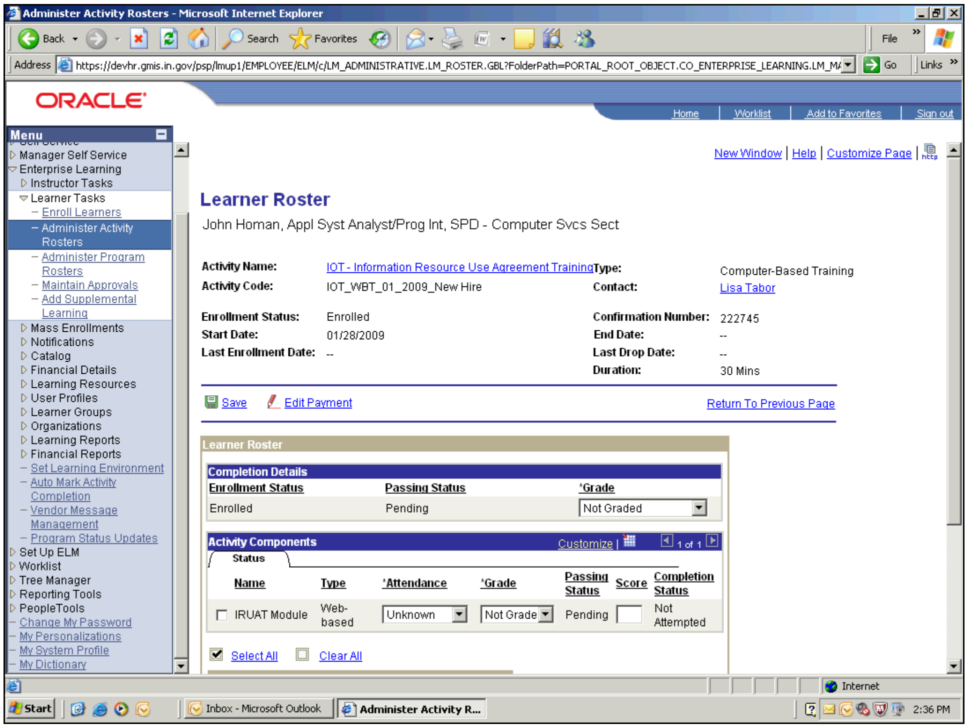
Step	Action
17.	The **Waitlist Priority** column displays a learner's waitlist priority number, if any.

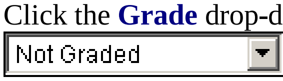


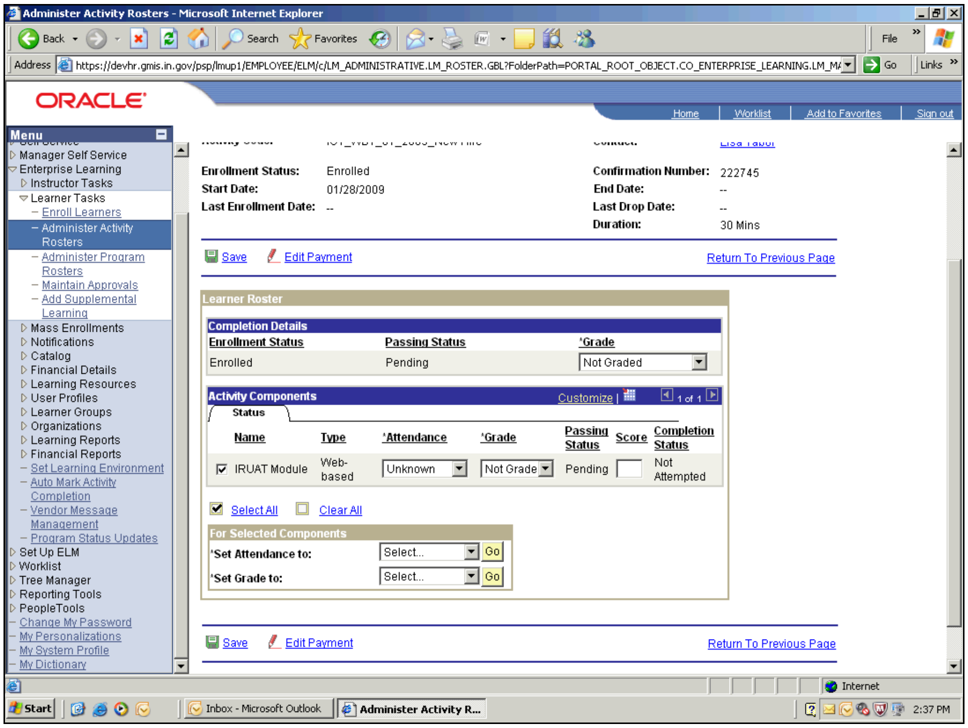
Step	Action
18.	Click the **Details** button to access the **Learner Roster** page. Details



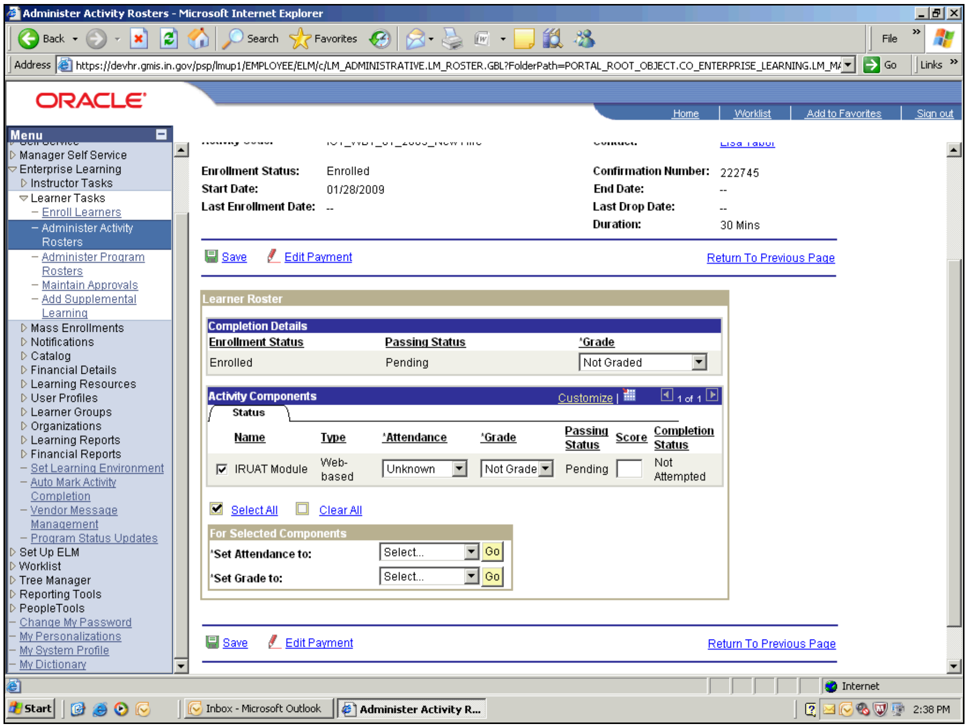
Step	Action
19.	The **Learner Roster** page can be used to enter learner **attendance statuses**, **completion statuses**, **grades**, and **scores**, for all <u>learning components</u> within an activity. The page is identical to the page used by instructors.



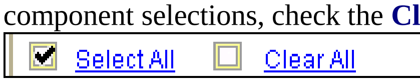
Step	Action
20.	The **Completion Details** section of the **Learner Roster** shows the learner(s) **Enrollment Status** and **Passing Status** for an activity. Click the **Grade** drop-down menu option to change the activity grade. 

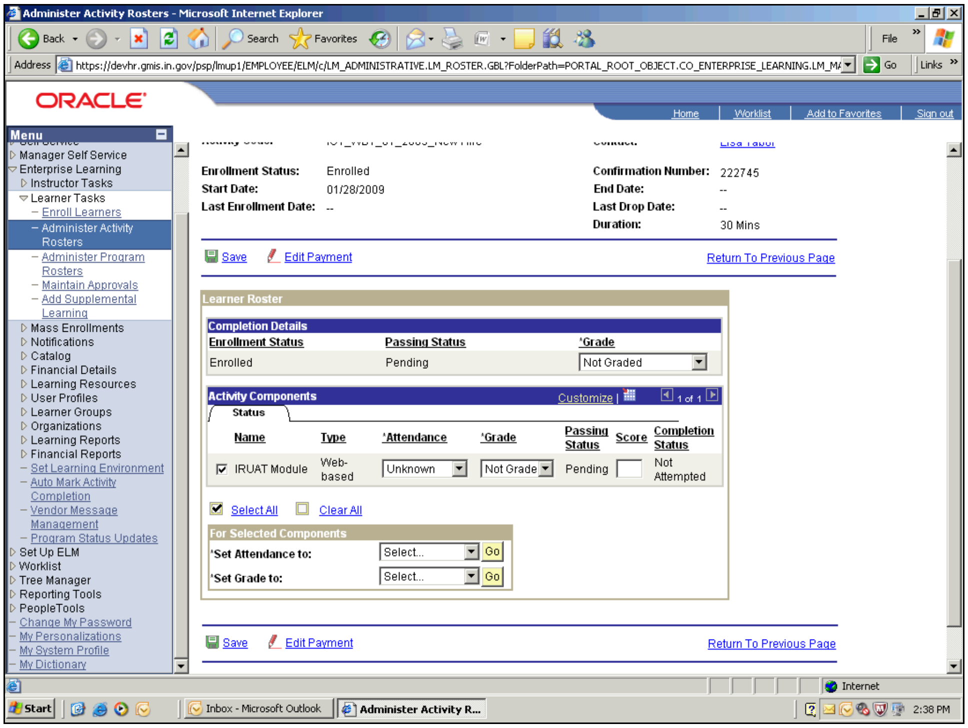


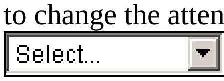
Step	Action
21.	The **Status** tab in the **Activity Components** section provides fields for updating the learner(s) **attendance**, **grade**, **passing status**, and **score** for each learning component. Click the **Attendance** and **Grade** drop-down menu buttons to change learner status as needed. These fields are the same as those on the **Component Roster** section on the **Component Roster** page.

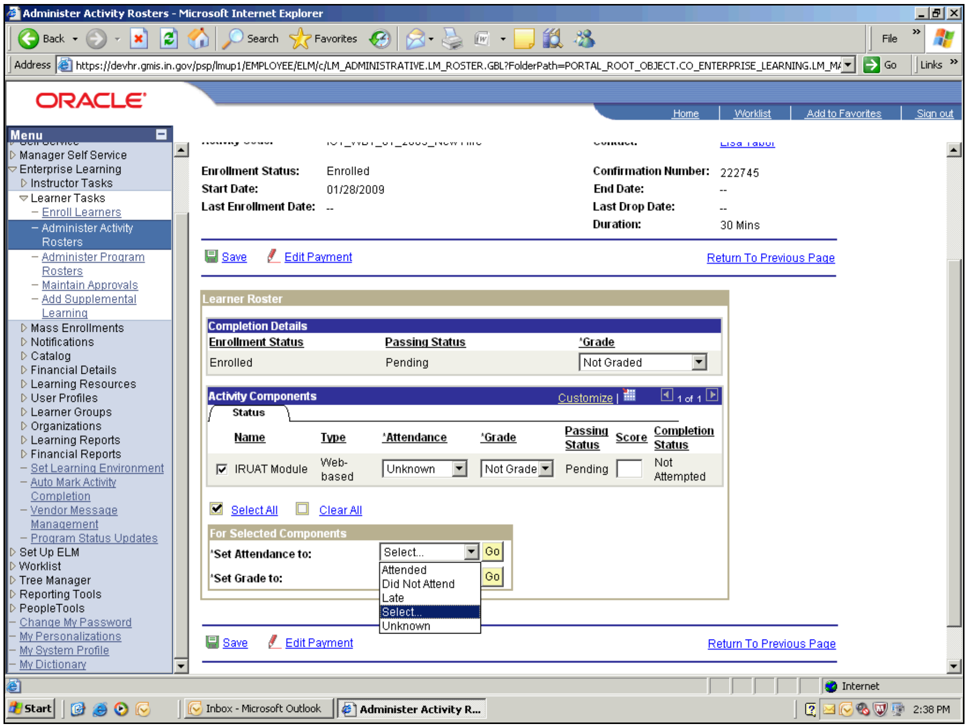


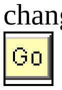
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>22.</td><td>Multiple component's may be selected to perform a single action by:

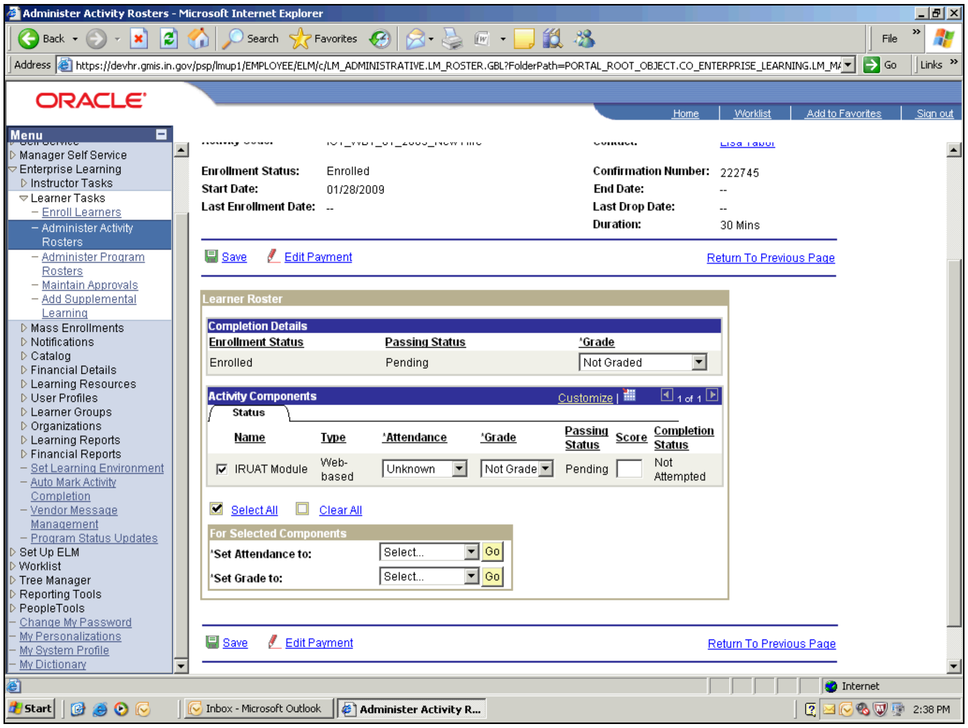
- checking the checkboxes of the left of each activity component in the Name column or by;
- checking the Select All checkbox located under the Status tab (to clear all activity component selections, check the Clear All checkbox).
</td></tr>
</table>

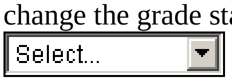


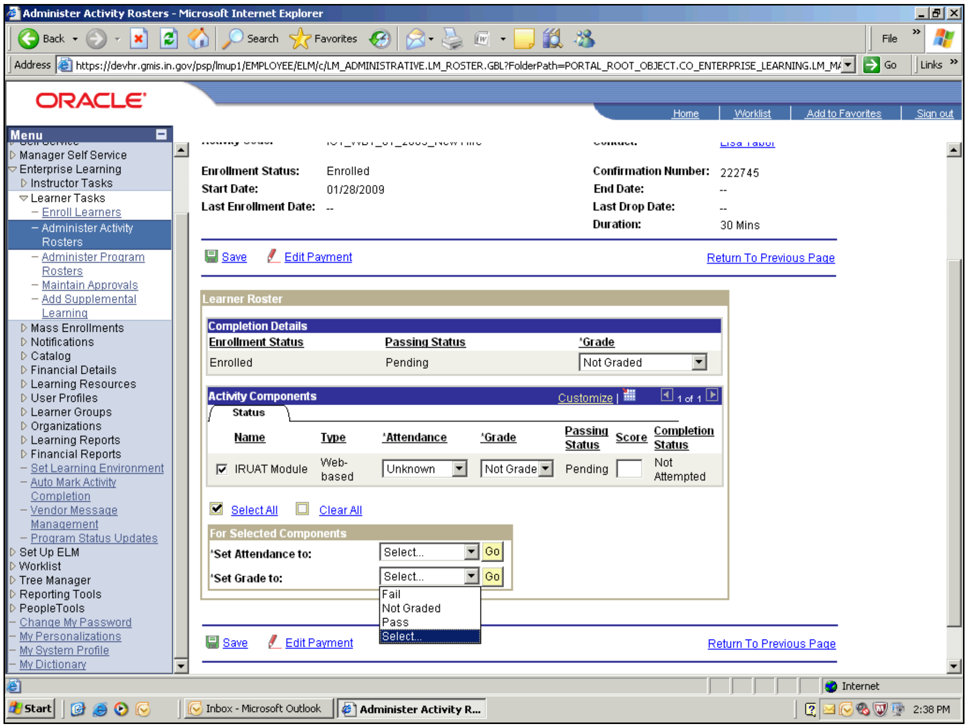
Step	Action
23.	Click the **Set Attendance to** drop-down menu button in the **For Selected Components** box to change the attendance status for all learners enrolled into an activity component. 

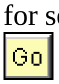


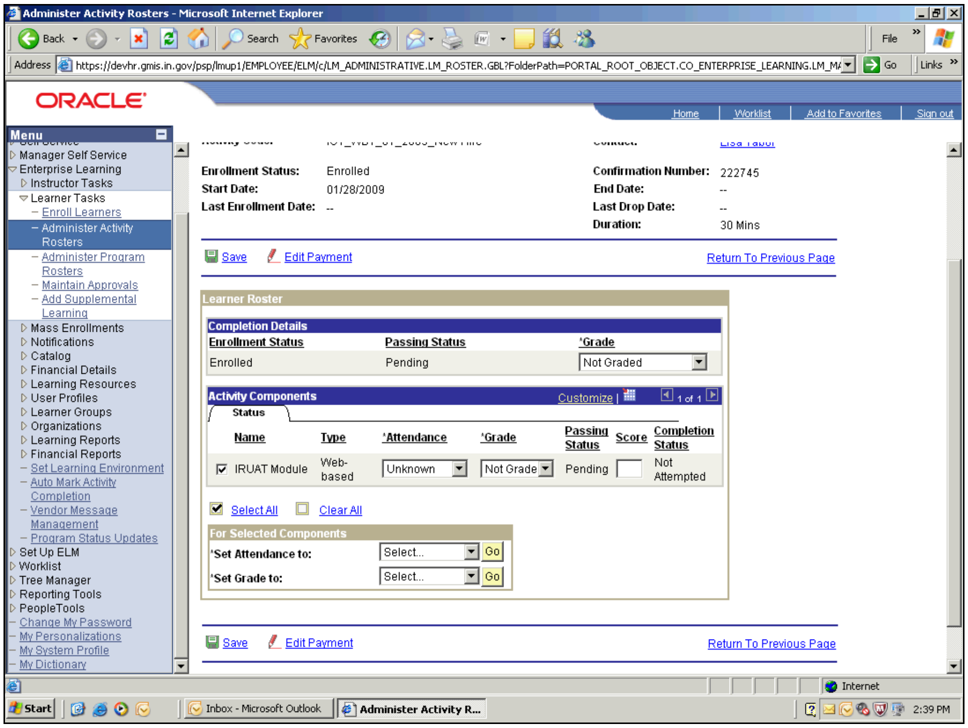
Step	Action
24.	Click the **Go** button to the right of the **Set Attendance to** field to capture attendance status changes for selected activity component learners. 



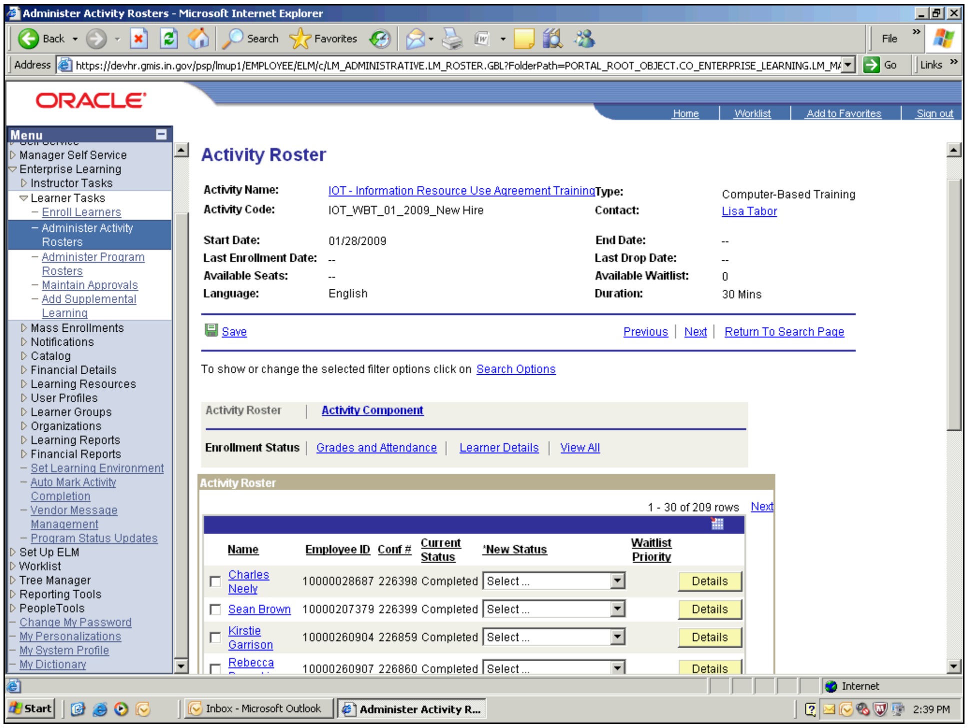
Step	Action
25.	Click the **Set Grade to** drop-down menu button in the **For Selected Components** box to change the grade status for all learners enrolled into an activity component. 



Step	Action
26.	Click the **Go** button to the right of the **Set Grade to** field to capture grade status changes for selected activity component learners. 



Step	Action
27.	Always remember to save before you leave the page. Click the **Save** link. Save
28.	Click the **Return To Previous Page** link to return to activity roster. Return To Previous Page



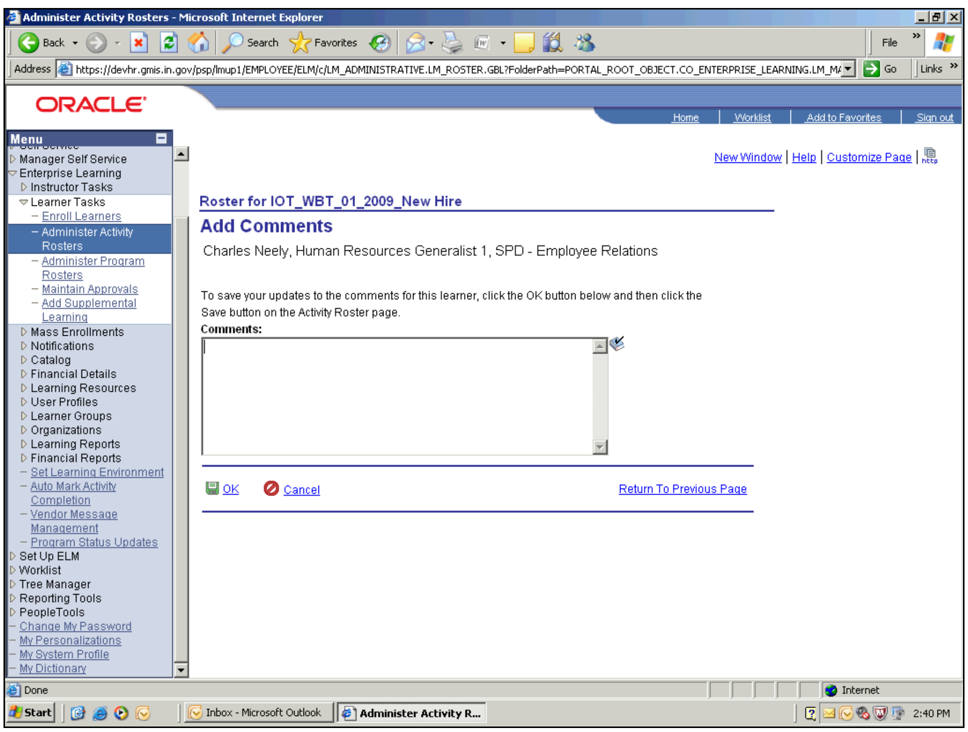
Step	Action
29.	Grades and attendance may also be marked directly through the **Grades and Attendance** link. This option allows for individual grade and attendance status recording instead of using the activity component status changes affecting all learners. Utilization of the **Group Action** feature may also be used to record the same grades or attendance for multiple learners as desired. Click the **Activity Roster - Grades and Attendance** link to review the **Grades and Attendance** list options in the **Activity Roster** section. Grades and Attendance

Multiple learners may be selected to perform a single action by checking the checkboxes of the left of learners names in the **Name** column. For example, to change an activity status for multiple learners to the same status at the same time, check the checkbox for each learner whose status is to be changed.

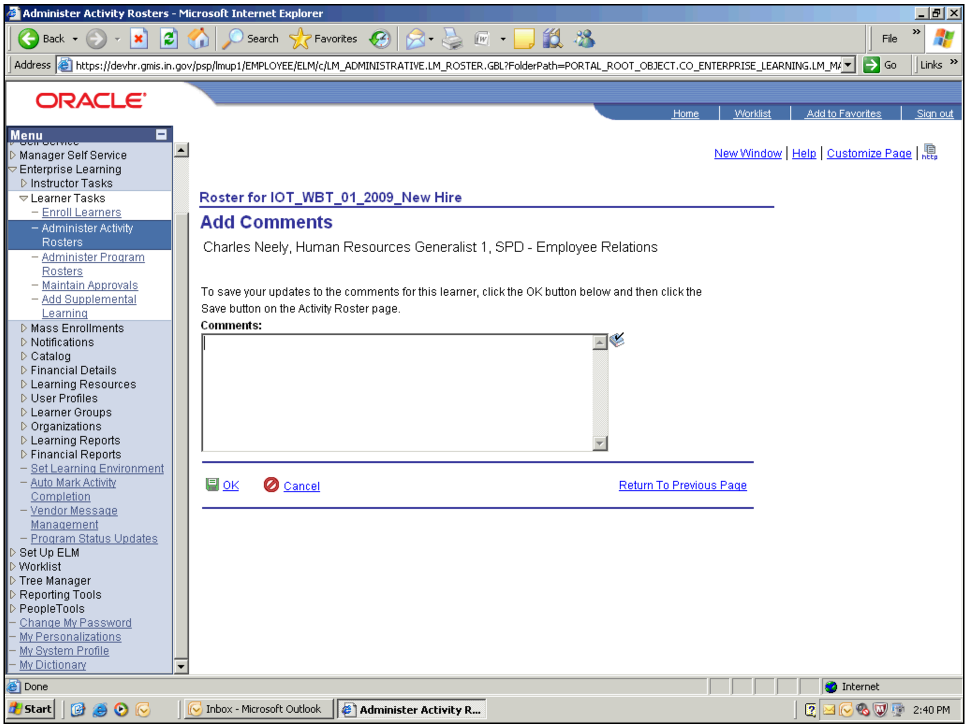
After checking the checkboxes of the individual learners to process an action for multiple learners, locate the **Set Attendance to** or **Set Grade to** drop-down menu button(s) to select the action(s) to be processed from the list of values (**Set Attendance to** or **Set Grade to** lists are often located at the bottom of the page). Then, click the **Go** button to complete the process.

Step	Action
30.	Click the **Grade** drop-down menu button to select the learner's grade for the activity. Not Graded
31.	Click the **Attendance** drop-down menu button to select the learner's attendance status for the activity. Unknown
32.	Click in the **Score** field to manually enter a learner's score, if desired.
33.	Click the **Comments** button to access the **Add Comments** page for entering comments about a learner's enrollment, if needed.

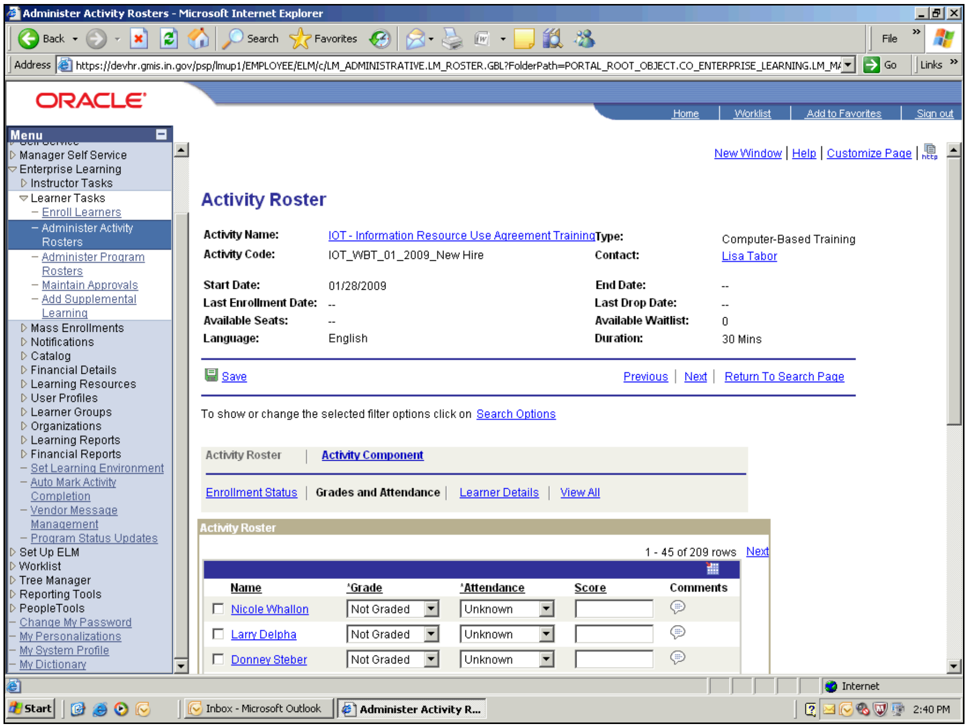
> The system displays the comments information entered into the **Comments** field on the self-service **Activity Progress** page that learners and managers can access. Comments also appear on some reports.



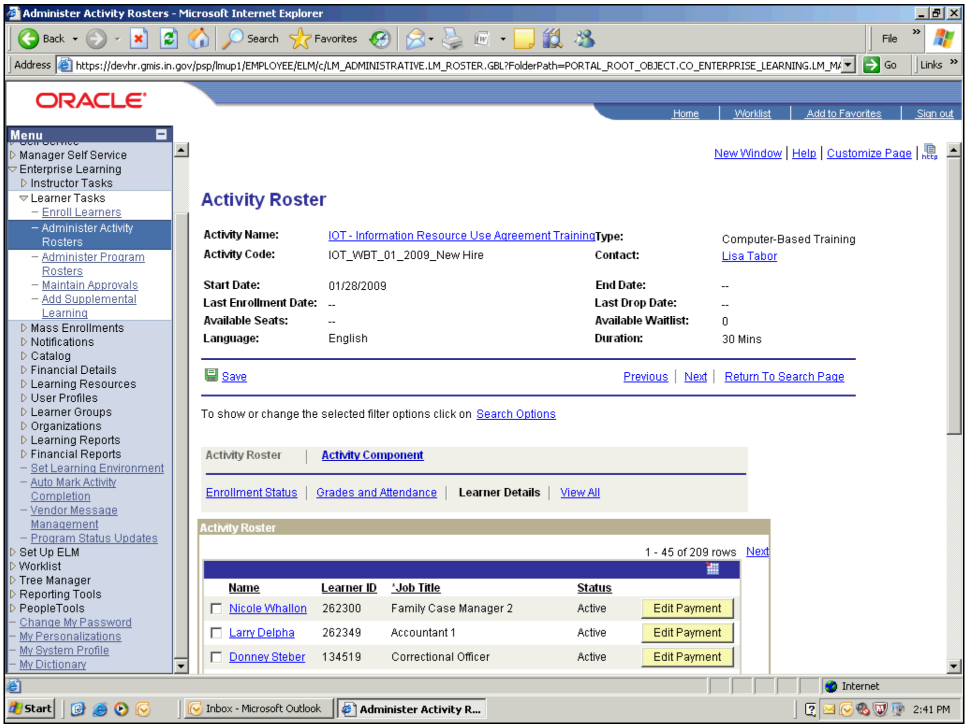
Step	Action
34.	Click the **OK** link to save entered comments or click the **Cancel** link to remove entered comments. OK Cancel



Step	Action
35.	Click the **Return To Previous Page** link. Return To Previous Page



Step	Action
36.	Click the **Activity Roster - Learner Details** link to view a **learner's ID**, **job title**, and **status**. Learner Details



Step	Action
37.	The **Learner ID** column display's each learner's system assigned **Learner ID** number. Learner ID

The **Learner ID** number is a number sequentially assigned by the **Enterprise Learning Management (ELM)** system. The Learner ID number should be unique to each learner and is established by the creation of a **Learner Profile** within the system.

The Learner ID number is <u>completely separate from</u> the **PeopleSoft ID number** (also called the **User ID**) assigned in the **PeopleSoft HR** system.

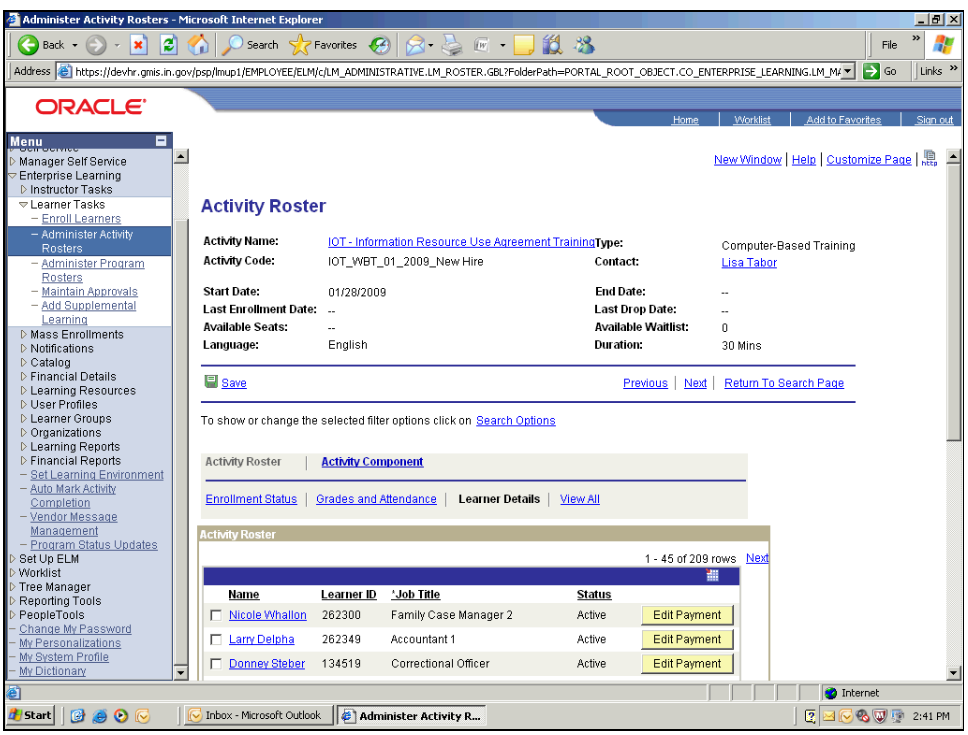
The PeopleSoft ID number consists of 1000XXXXXX. The User ID is the first initial of a person's first name and the last six digits of the PeopleSoft ID number. For example: an employee named Lucy Roberts will have a PeopleSoft HR <u>PeopleSoft ID</u> number of 10000058556; but her PeopleSoft HR <u>User ID</u> would be L058556.

Every night, the PeopleSoft HR records integrate with the PeopleSoft ELM records. The PeopleSoft ELM system searches for new PeopleSoft HR User IDs to establish the PeopleSoft ELM Learner Profile. Once a new ELM Learner Profile is created, the system sequentially assigns the next Learner ID available to the learner. Learner ID's are needed to establish learner groups within the system for learner activity assignments and enrollments.

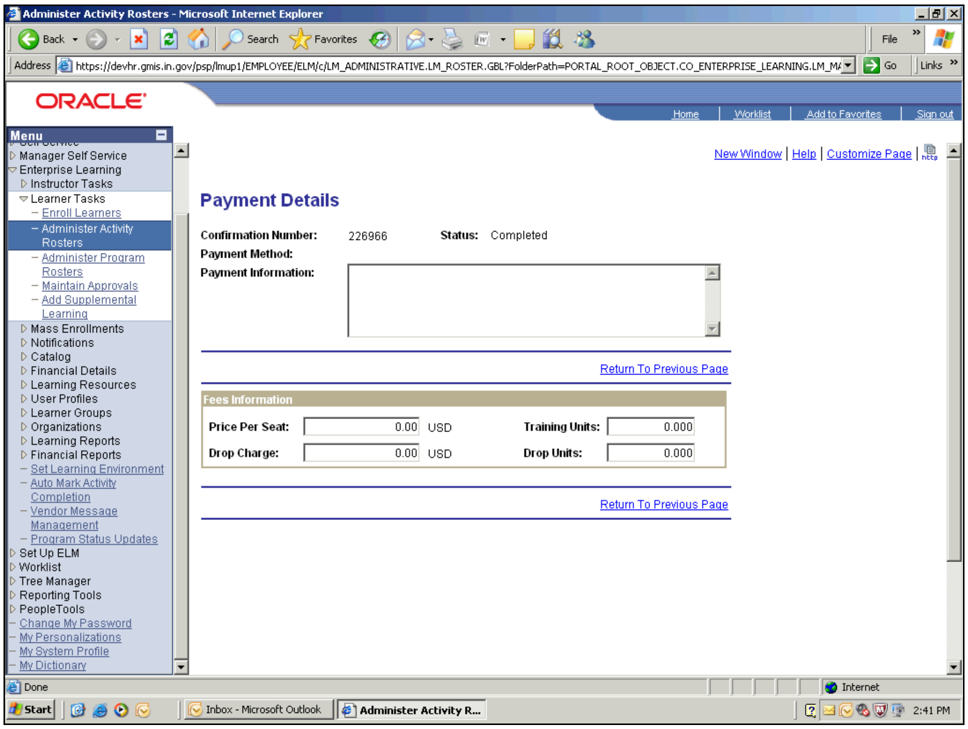
The PeopleSoft HR system stores job data record information while the PeopleSoft

	ELM stores training record information. The PeopleSoft User ID links the two systems together. An overview of the process is: 1. A PeopleSoft HR Job Data record is created in the system and a **PeopleSoft ID** number is assigned (10000XXXXXX). 2. A **User ID** is created by a person's first initial and last six digits of the PeopleSoft ID number (LXXXXXX). 3. The PeopleSoft HR system **integrates job data records** with the PeopleSoft ELM system. 4. New **learner profiles** are created in the PeopleSoft ELM system using the User ID number. 5. The PeopleSoft ELM system sequentially assigns a **Learner ID number** to the learner profile to track training enrollments and completions in the ELM.

Step	Action
38.	The **Job Title** column display's each learner's job title. Job Title
39.	The **Status** column display's each learner's job status (the system sets the value to **Inactive** when a learner is terminated in the PeopleSoft HR system). Status



Step	Action
40.	Click the **Edit Payment** button to edit payment information for a learner, if used. Edit Payment



Step	Action
41.	If the payment component is used, edit payment information using the fields in the **Fees Information** section. Fees Information

The **Fees Information** fees and drop charges for an activity default from the **Activity Details** page. The section is used to modify activity fees and drop charges for each learner.

***Fees Information* fields include:**

Price Per Seat - A price for the activity.

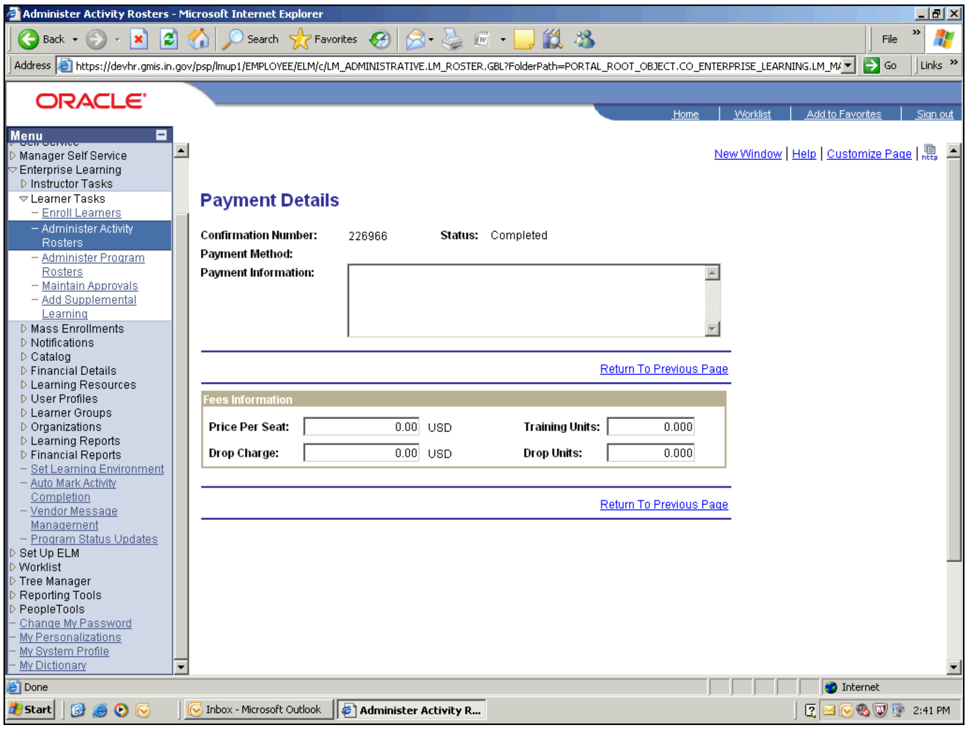
Drop Charge - A drop charge for the activity.

Training Units - The number of training units to be changed to each learner for the activity.

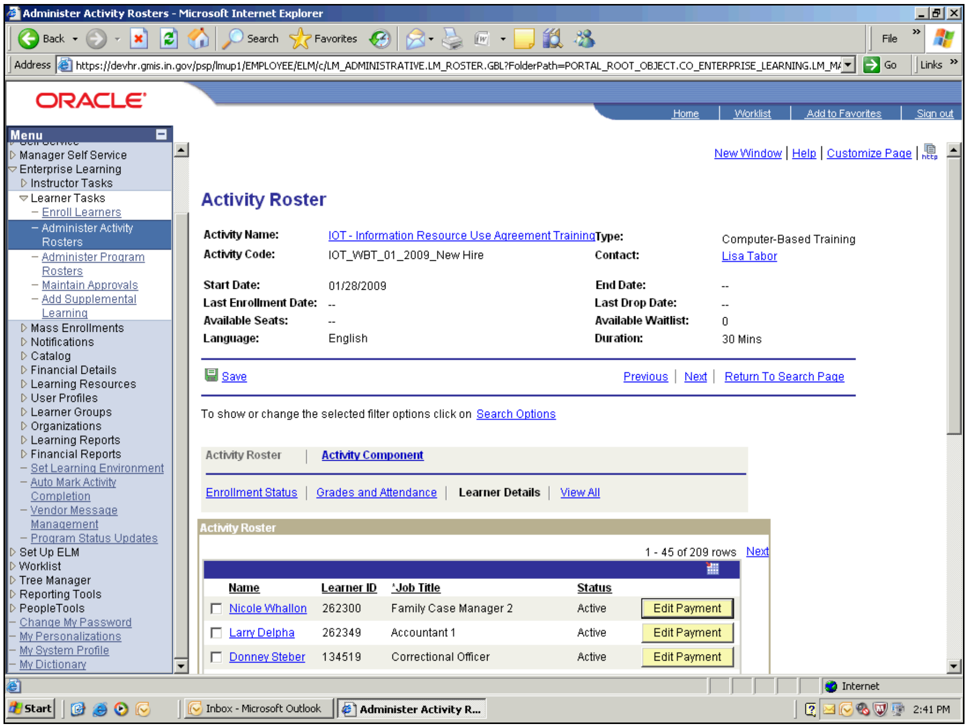
Drop Units - The number of training units to be charged back to each learner when the activity is dropped.

Prices can increase or decrease after enrollment and drop charges may be changed at

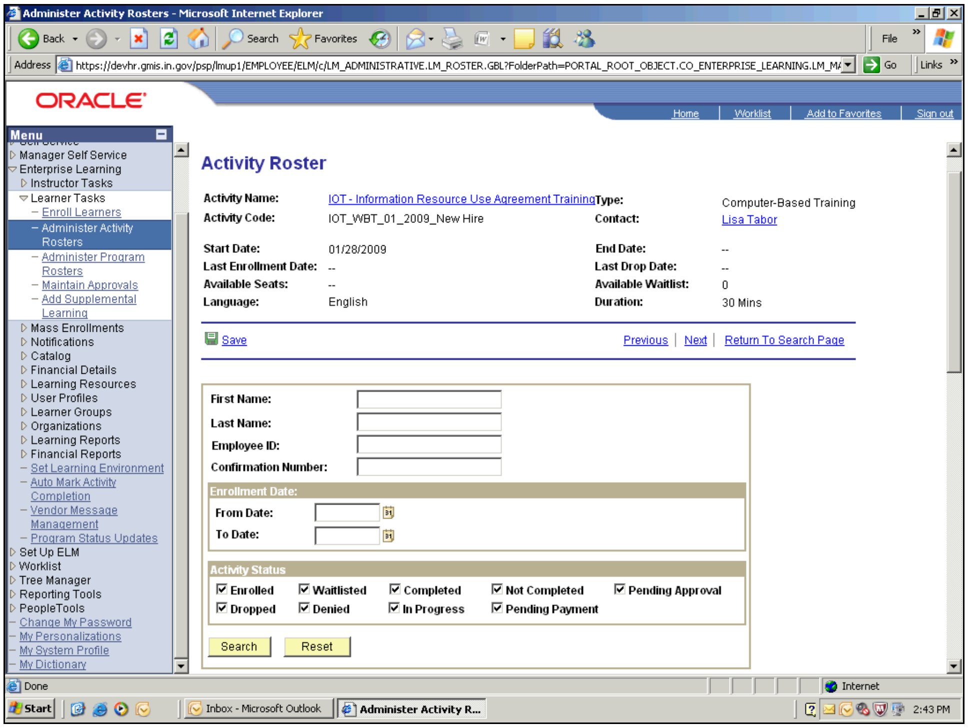
	any time. **Changes to drop charges take affect only if the changes are made <u>before</u> dropping the learner.** The system does not allow changes to drop charges for a learner after the learner has been dropped. Any changes to activity prices or drop charges result in a new transaction row for the enrollment record enabling the tracking of all payment changes to an enrollment record.



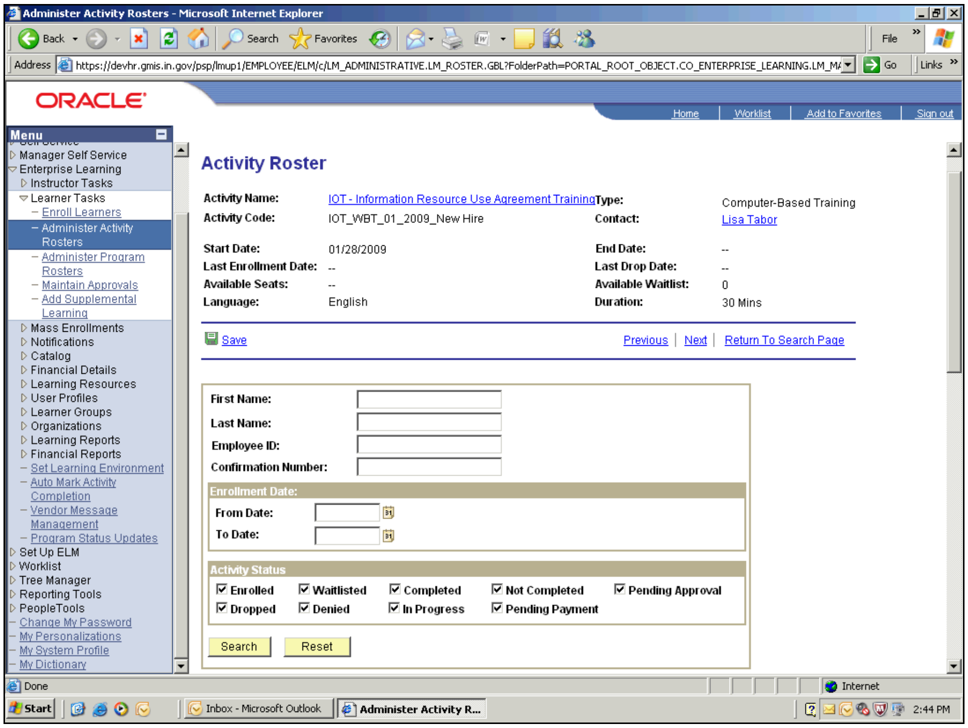
Step	Action
42.	After completing any payment changes, click the **Return To Previous Page** link. Return To Previous Page



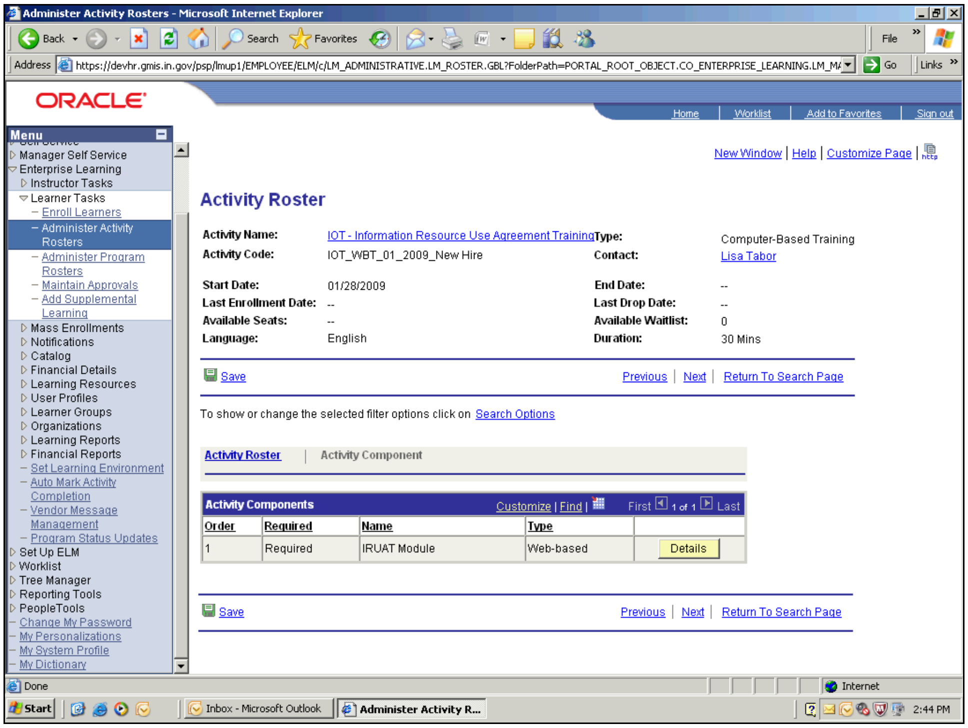
Step	Action
43.	Click the **Activity Roster - View All** link to see a summary page of all activity roster information. View All
44.	To locate a learner and/or learners in the **Activity Roster** section list using specific search criteria, click the **Search Options** link towards the top of the page. Search Options

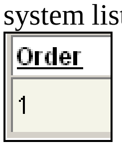
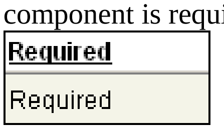
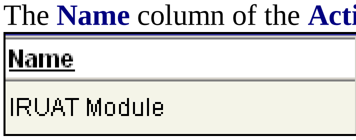
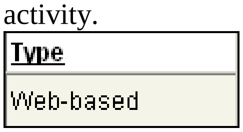


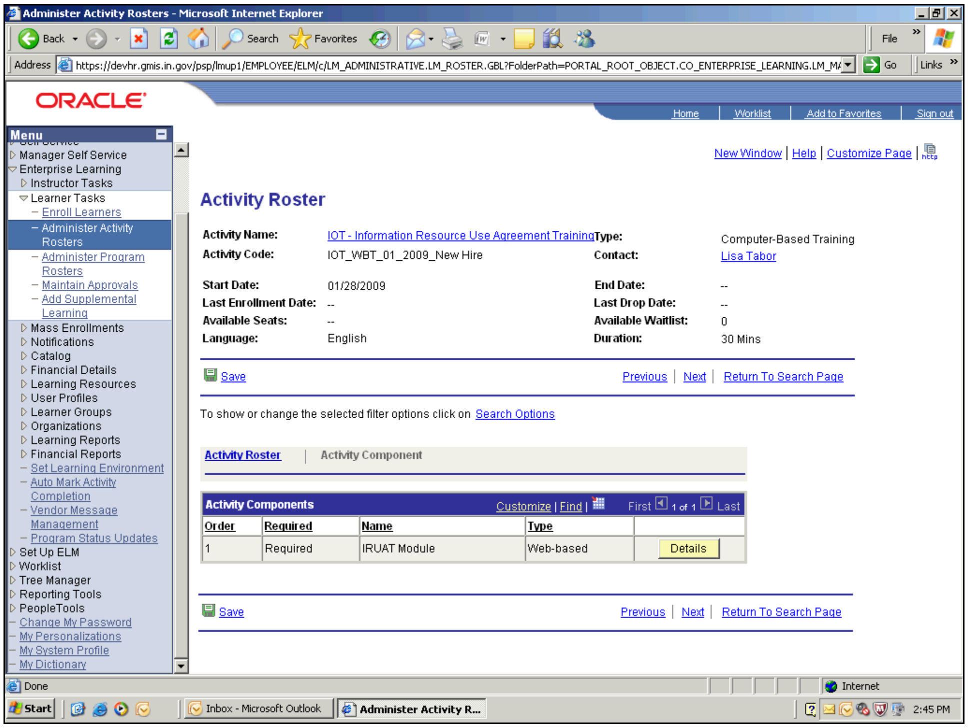
Step	Action
45.	Search for an individual learner by entering information into any or any combination of the **First Name**, **Last Name**, **Employee ID**, or **Confirmation Number** fields.
46.	Search for individual or multiple learners by entering dates into the **From Date** and/or **To Date** fields in the **Enrollment Date** section.
47.	Search for individual or multiple learners by checking and/or un checking activity status checkboxes in the **Activity Status** section.



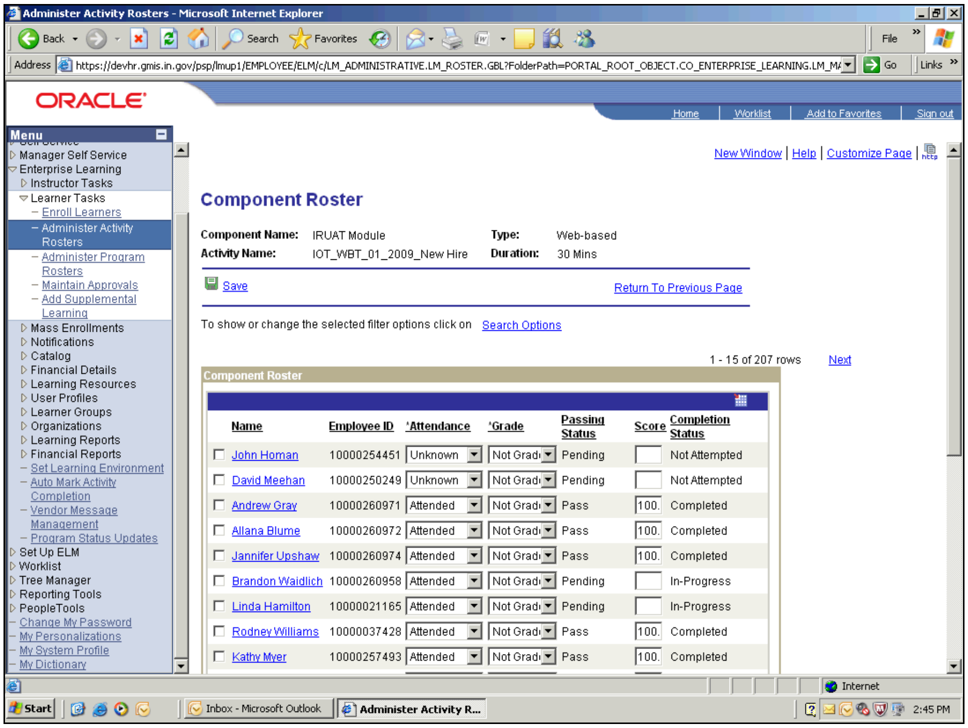
Step	Action
48.	Click the **Search** button to locate the learner(s) matching the search criteria. Search
49.	Click the **Activity Component** link to view activity components (delivery methods) entered for the activity. Activity Component



Step	Action
50.	The **Order** column of the **Activity Components** section shows the numerical order the system lists the learning components. 
51.	The **Required** column of the **Activity Components** section shows if the learning component is required to complete the activity. 
52.	The **Name** column of the **Activity Components** section shows the title of the activity. 
53.	The **Type** column of the **Activity Components** section shows the delivery method for the activity. 



Step	Action
54.	Click the **Details** button in the **Activity Components** section to view the **Component Roster** list for the learning method. Details

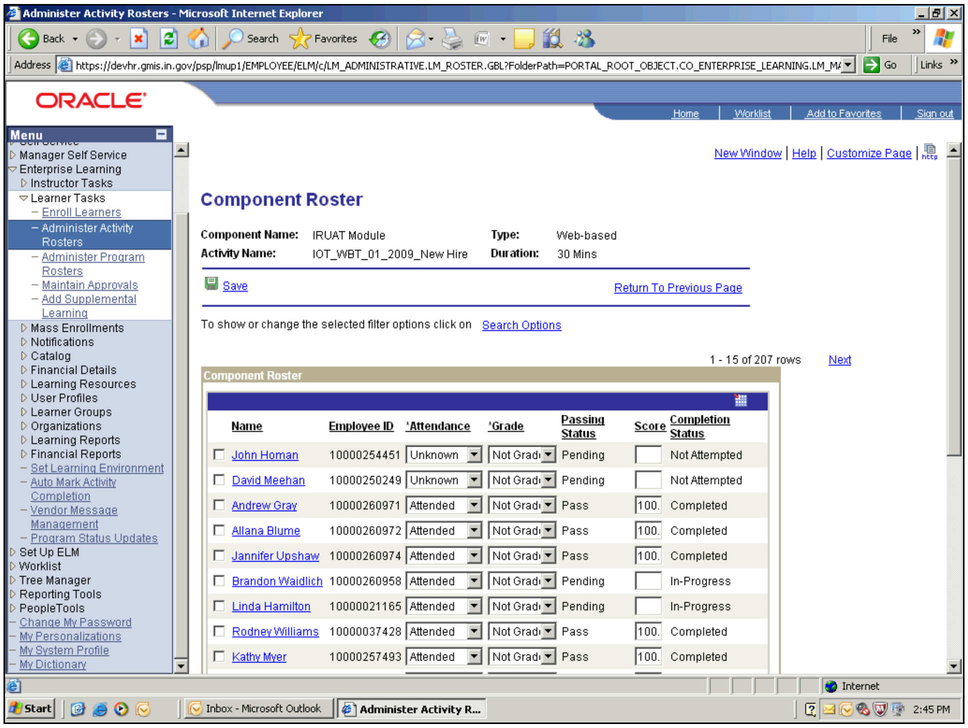


Step	Action
55.	Click a learner's name link in the **Name** column to access the **User Profile** page. **Name**

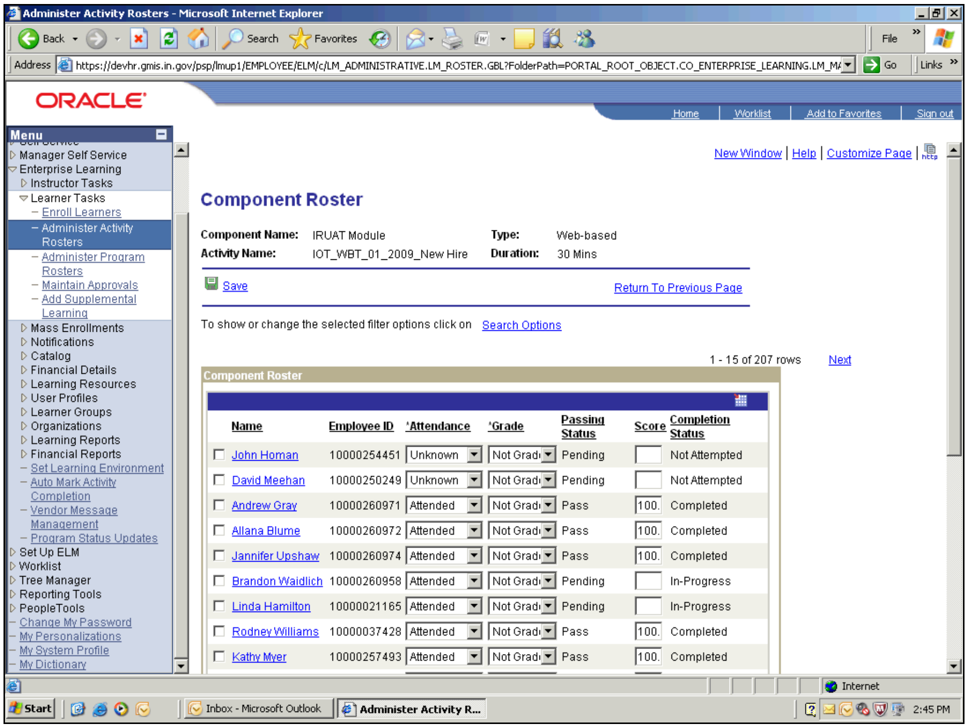
The **User Profile** displays high-level job and contact information about the learner.

This information may be useful to confirm a learner's job title if catalog administrator approval is needed for training specific to a job title or employment level (such as supervisor or manager only).

The **Component Roster** section list may return more learners than can be viewed on one page. Use the **Next** link in the upper-right-hand corner of the **Component Roster** section to move through the list of learners.



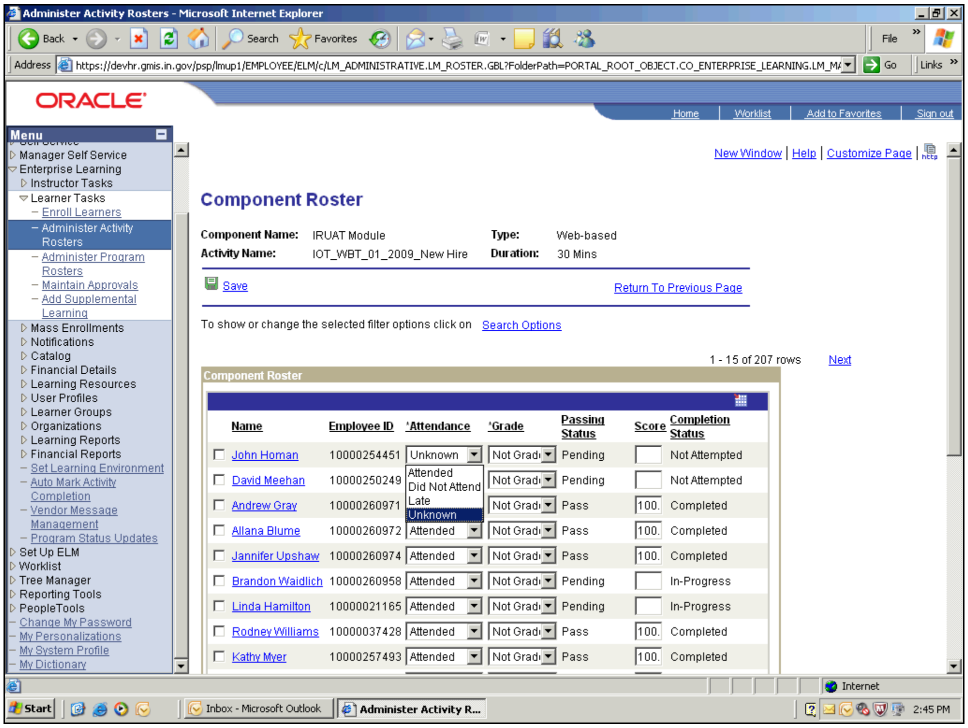
Step	Action
56.	The **Employee ID** column display's each learner's **PeopleSoft HR Employee ID** number (this number may also be referenced as the **PeopleSoft ID** number or **User ID** by system users). Employee ID

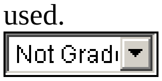


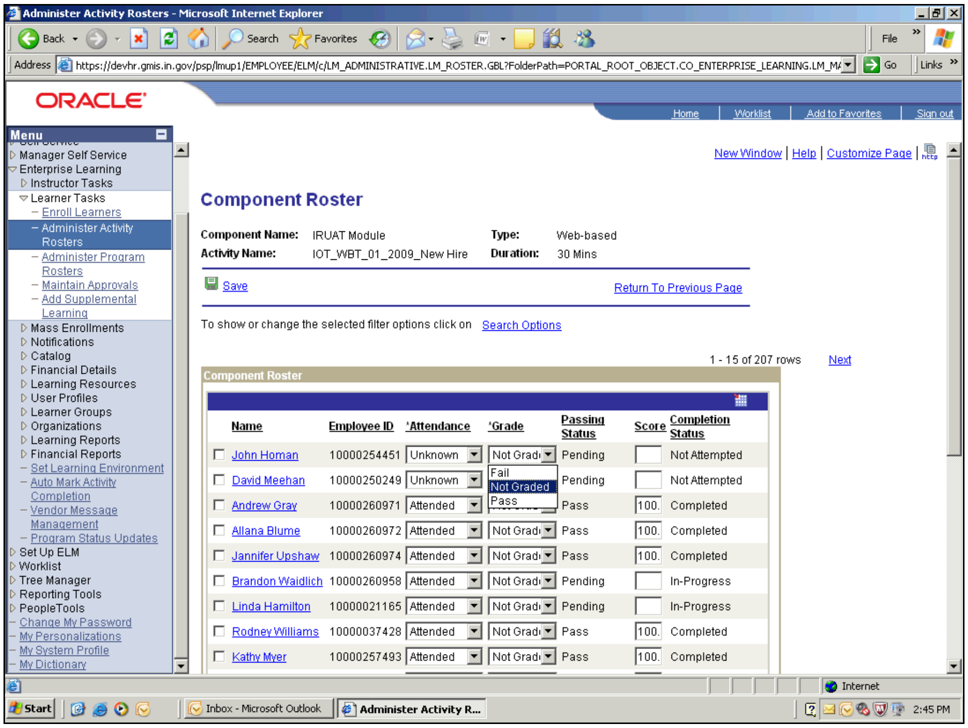
Step	Action
57.	Click the **Attendance** drop-down menu button to change an individual learner's attendance status. *Attendance

Multiple learners may be selected to perform a single action by checking the checkboxes of the left of learner's names in the **Name** column. For example, to change an activity status for multiple learners to the same status at the same time, check the checkbox for each learner whose status is to be changed.

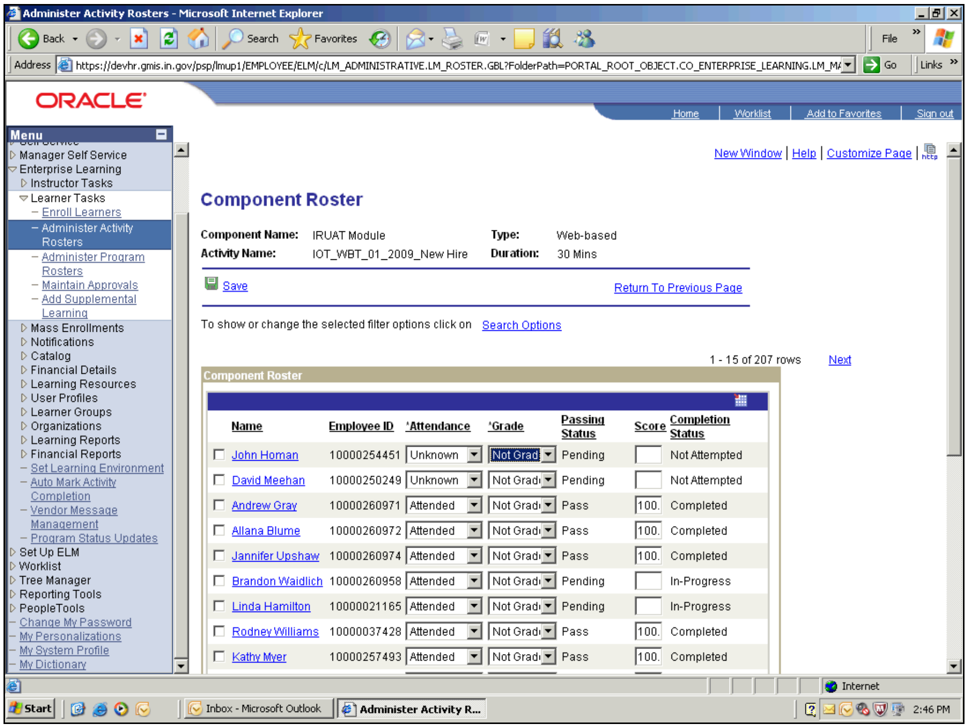
After checking the checkboxes of the individual learners to process an action for multiple learners, locate the **Set Attendance to** or **Set Grade to** drop-down menu button(s) to select the action(s) to be processed from the list of values (**Set Attendance to** or **Set Grade to** lists are often located at the bottom of the page). Then, click the **Go** button to complete the process.



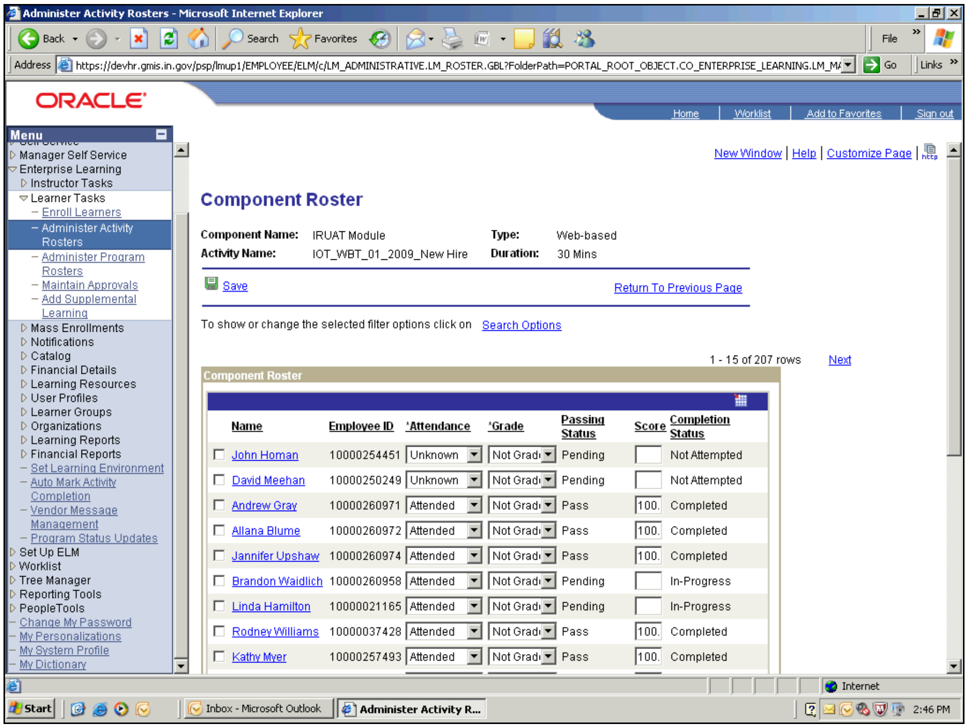
Step	Action
58.	Click the **Grade** drop-down menu button to change an individual learners grade status, if used. 



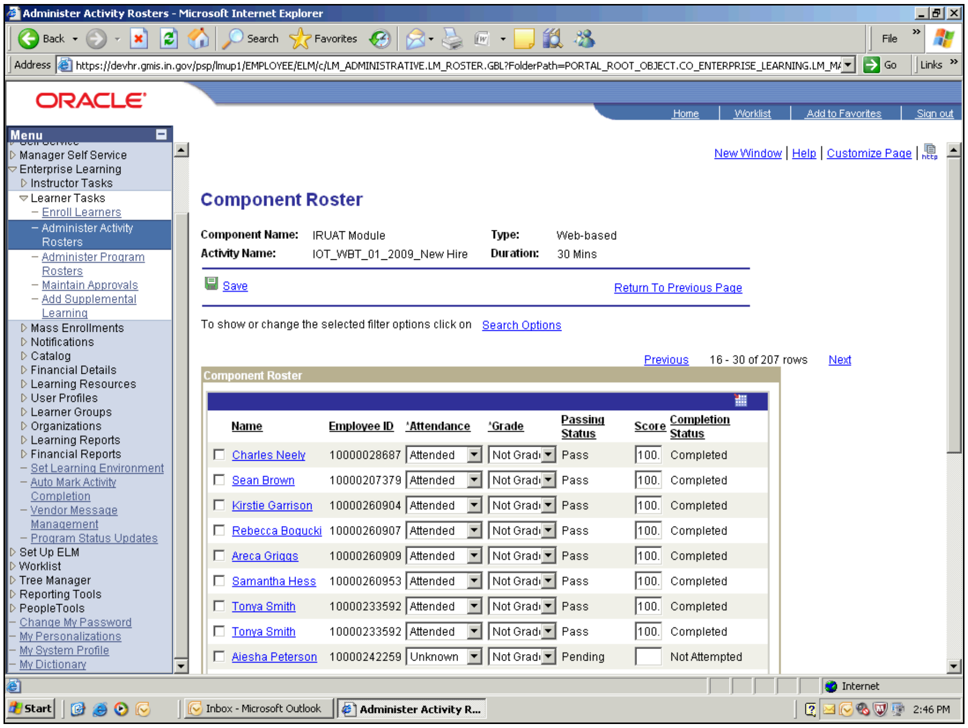
Step	Action
59.	The **Passing Status** column displays a learner's current passing status for the activity. Passing Status



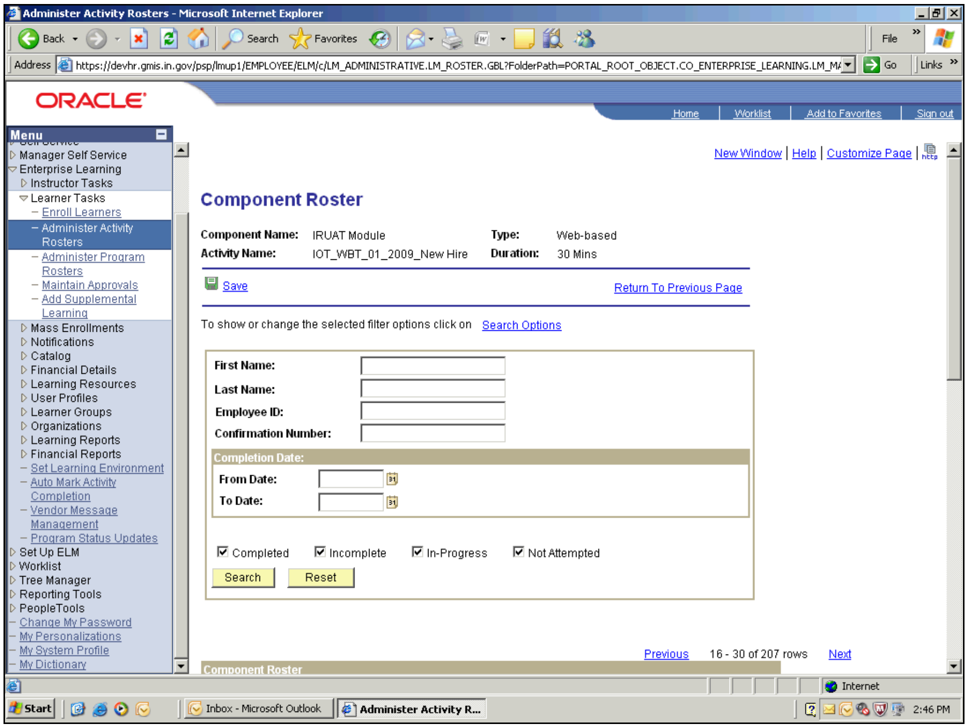
Step	Action
60.	The **Score** column displays a learner's score for completed activities.



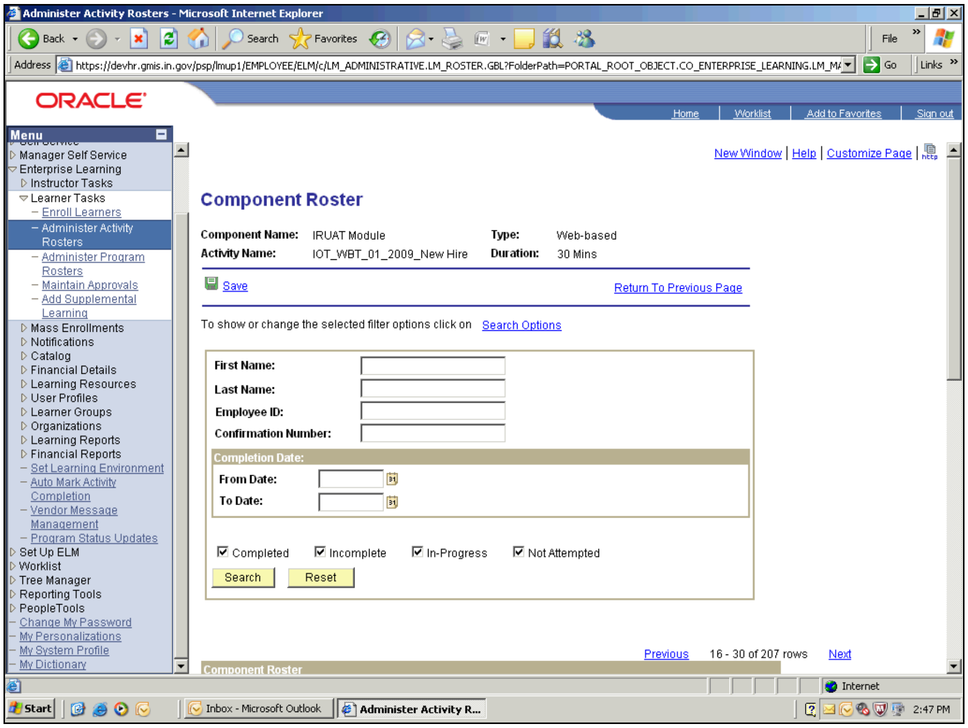
Step	Action
61.	The **Completion Status** column displays a learner's current completion status for the activity. 



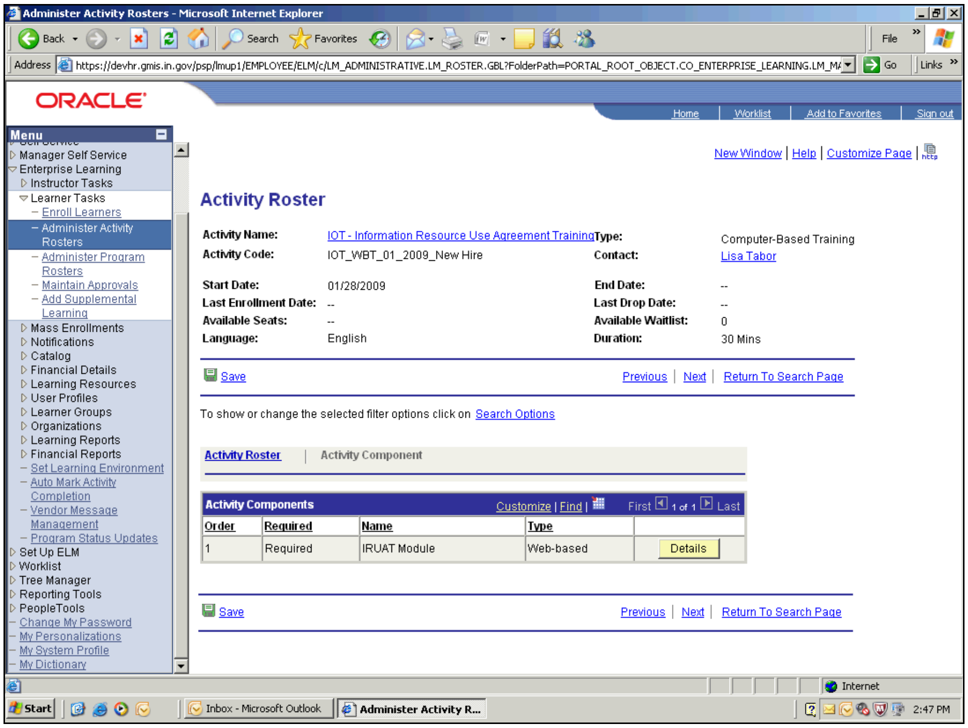
Step	Action
62.	To locate a learner and/or learners in the **Component Roster** section list using specific search criteria, click the **Search Options** link towards the top of the page. Search Options



Step	Action
63.	Search for an individual learner by entering information into any or any combination of the **First Name**, **Last Name**, **Employee ID**, or **Confirmation Number** fields.
64.	Search for individual or multiple learners by entering dates into the **From Date** and/or **To Date** fields in the **Completion Date** section.
65.	Search for individual or multiple learners by checking and/or un checking activity status checkboxes.



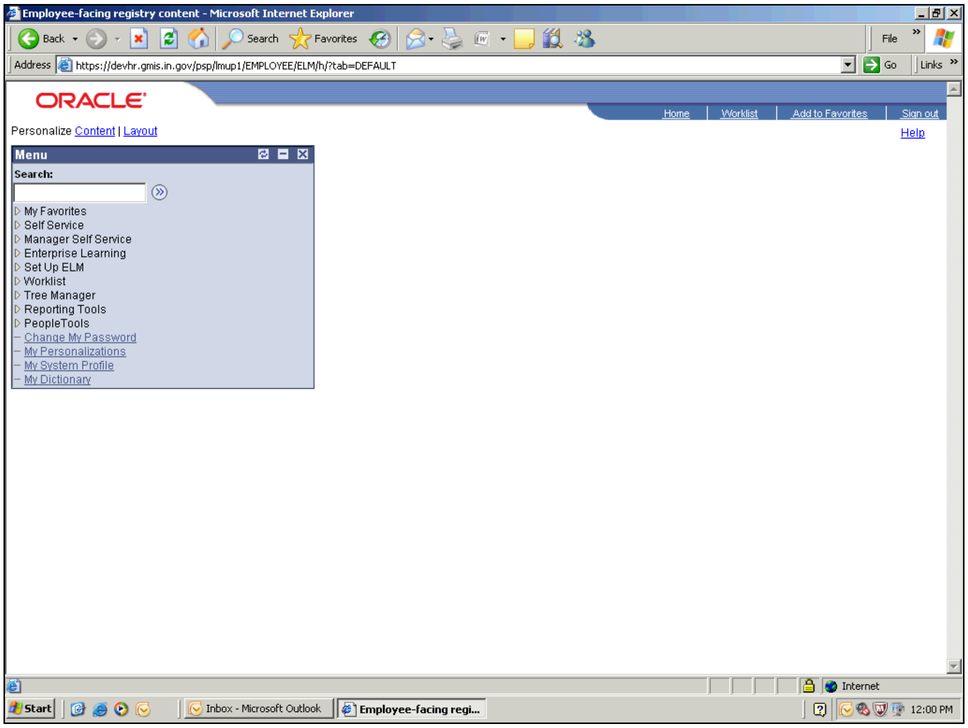
Step	Action
66.	Click the **Search** button to locate the learner(s) matching the search criteria. Search
67.	Click the **Return To Previous Page** link to return to the **Activity Component** page. Return To Previous Page



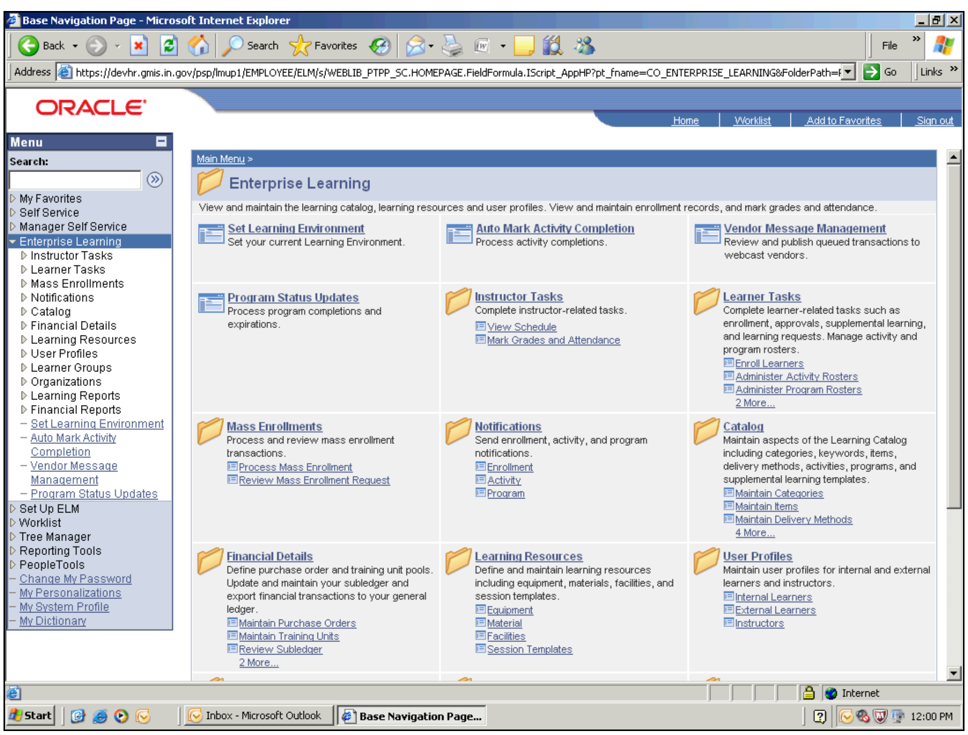
Step	Action
68.	Click the **Activity Roster** link to return to the activities' activity roster. Activity Roster
69.	Click the **Save** link to save learner updates. Save
70.	Congratulations! You have successfully reviewed and/or made changes to the course activity and/or component roster. **End of Procedure.**

How to Maintain Approvals

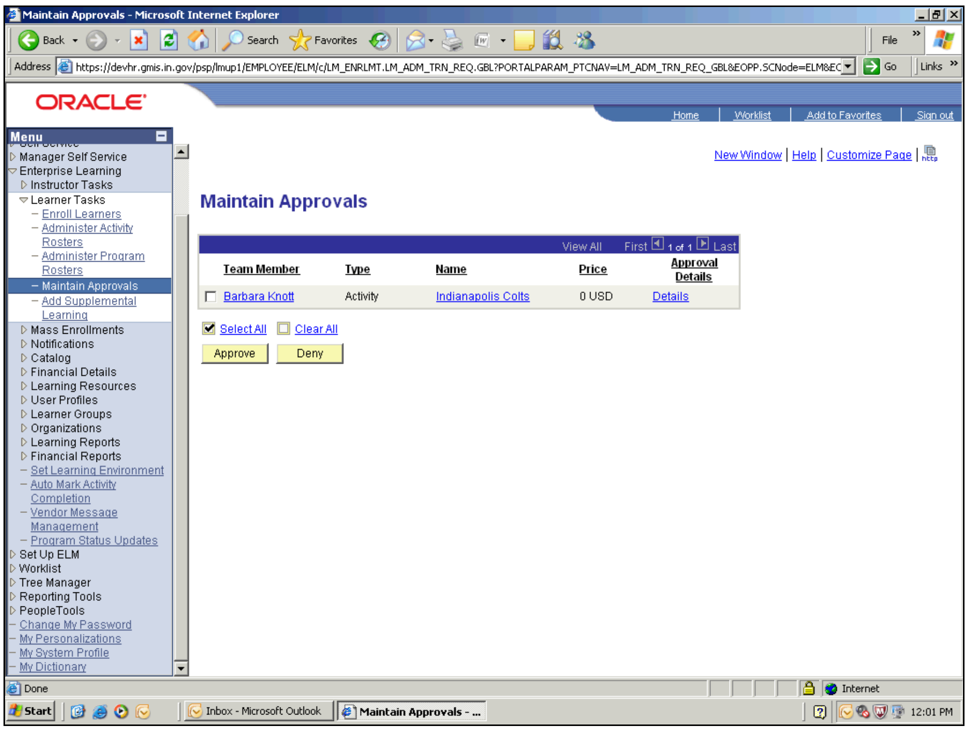
This lesson will teach administrators acting as special catalog approvers how to approve or deny activity learning requests.



Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



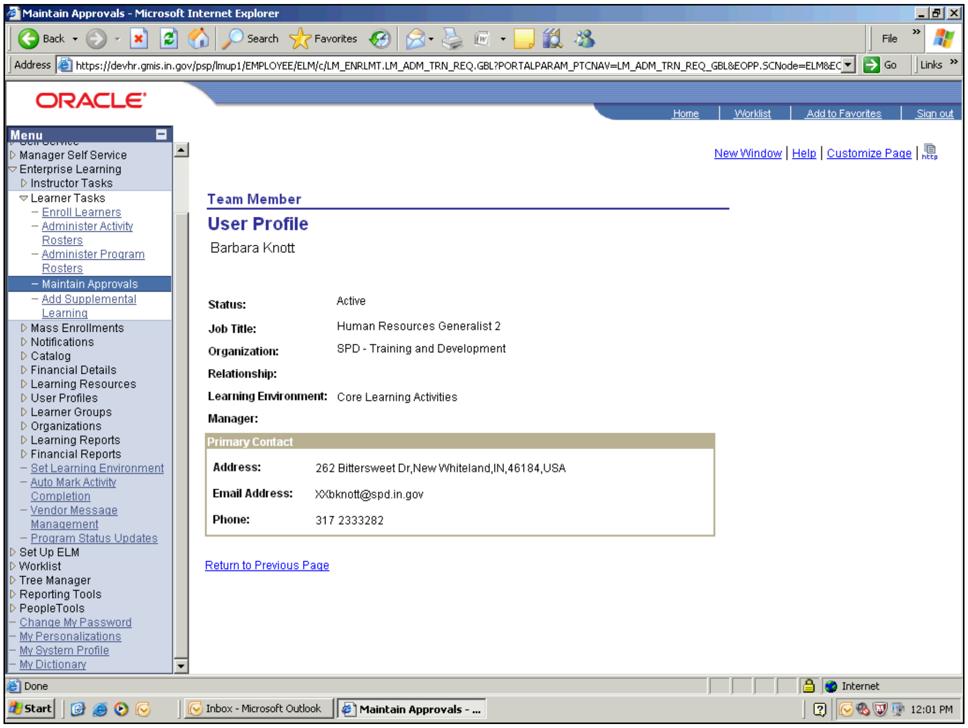
Step	Action
2.	Click the **Learner Tasks** link. Learner Tasks
3.	Click the **Maintain Approvals** link. Maintain Approvals



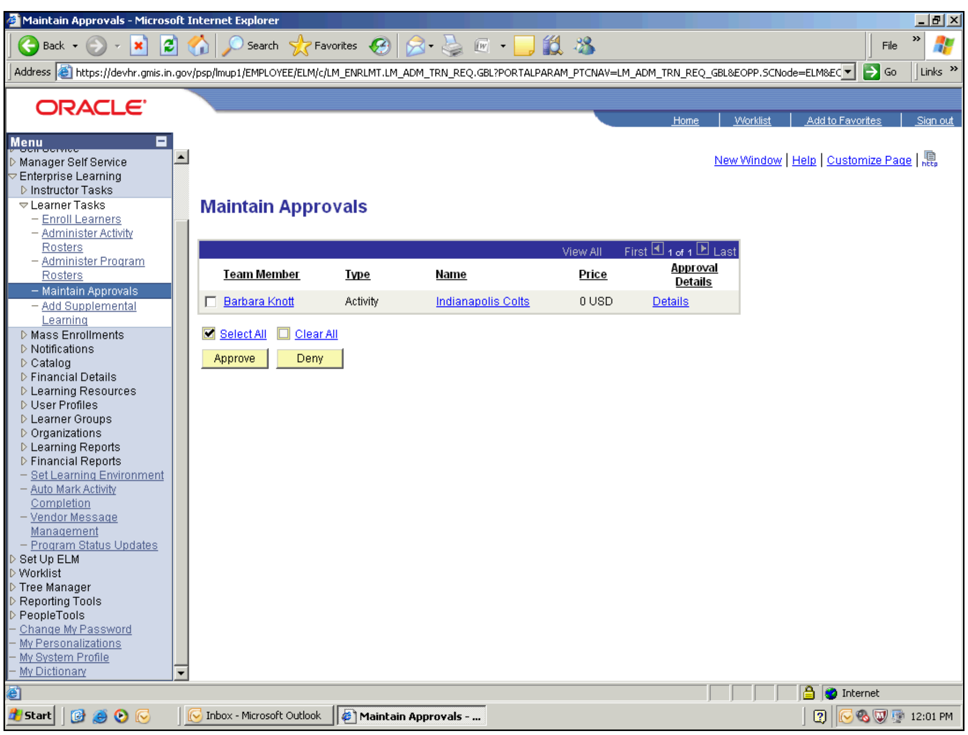
Step	Action
4.	Click the **Name** link in the **Team Member** column to view a learner's **User Profile** information. Barbara Knott

The **User Profile** displays high-level job and contact information about the learner.

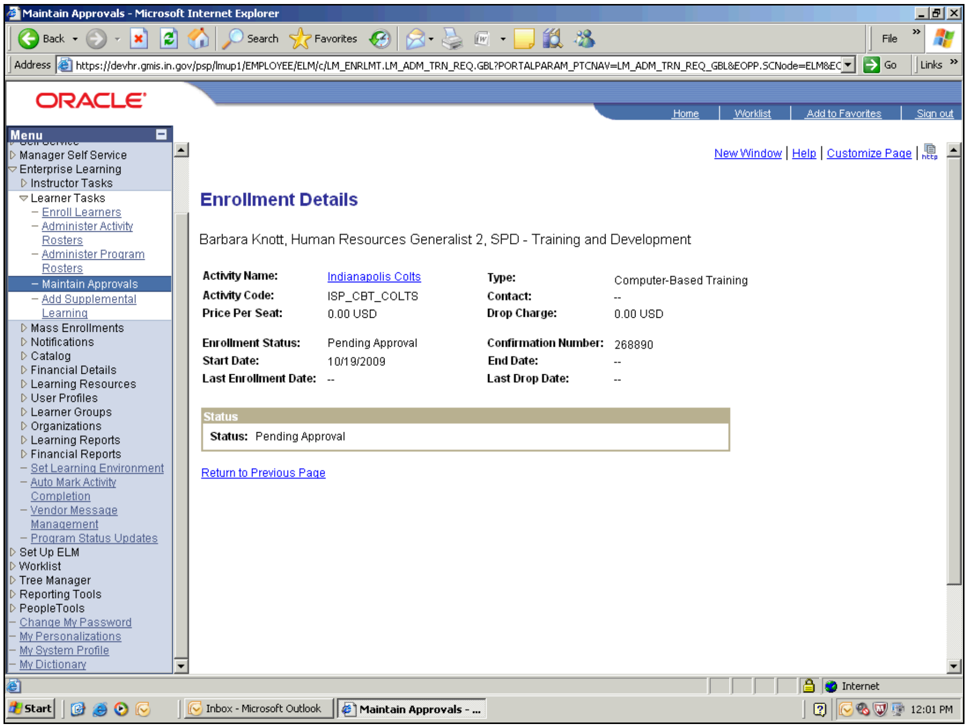
This information may be useful to confirm a learner's job title if catalog administrator approval is needed for training specific to a job title or employment level (such as supervisor or manager only).



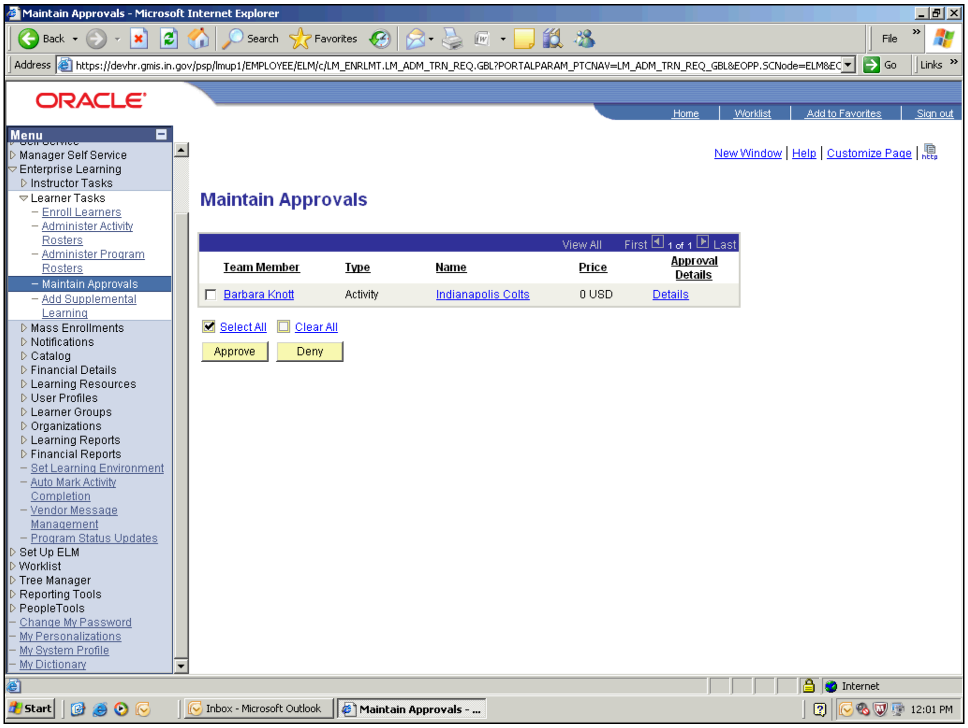
Step	Action
5.	After reviewing the **User Profile**, click the **Return to Previous Page** link. Return to Previous Page



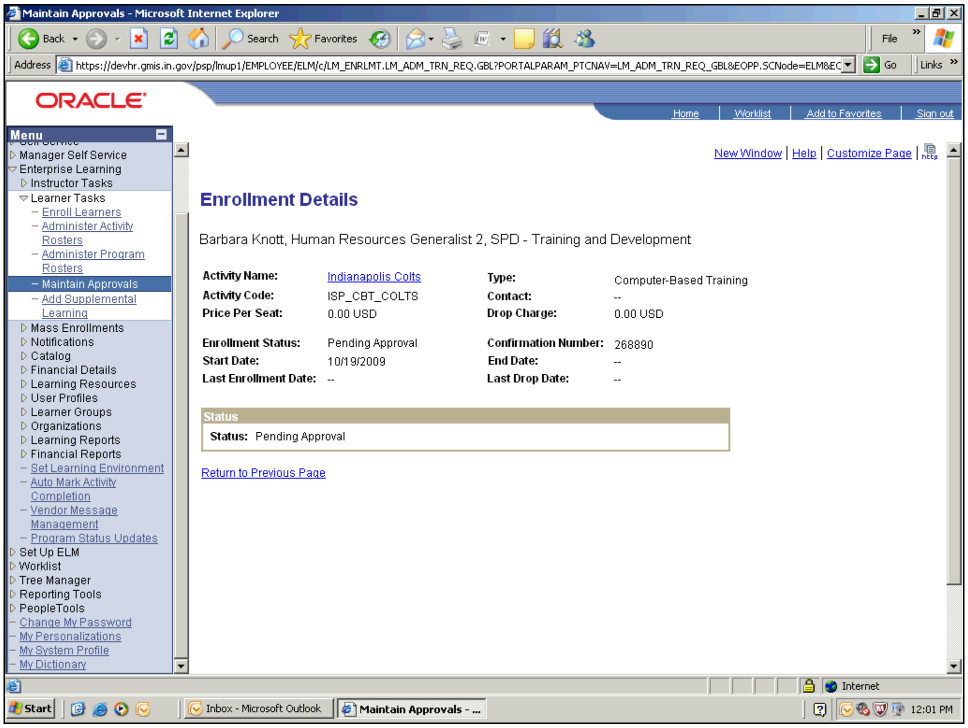
Step	Action
6.	Click the activity title link in the **Name** column to view an activity's **enrollment details** information. Indianapolis Colts



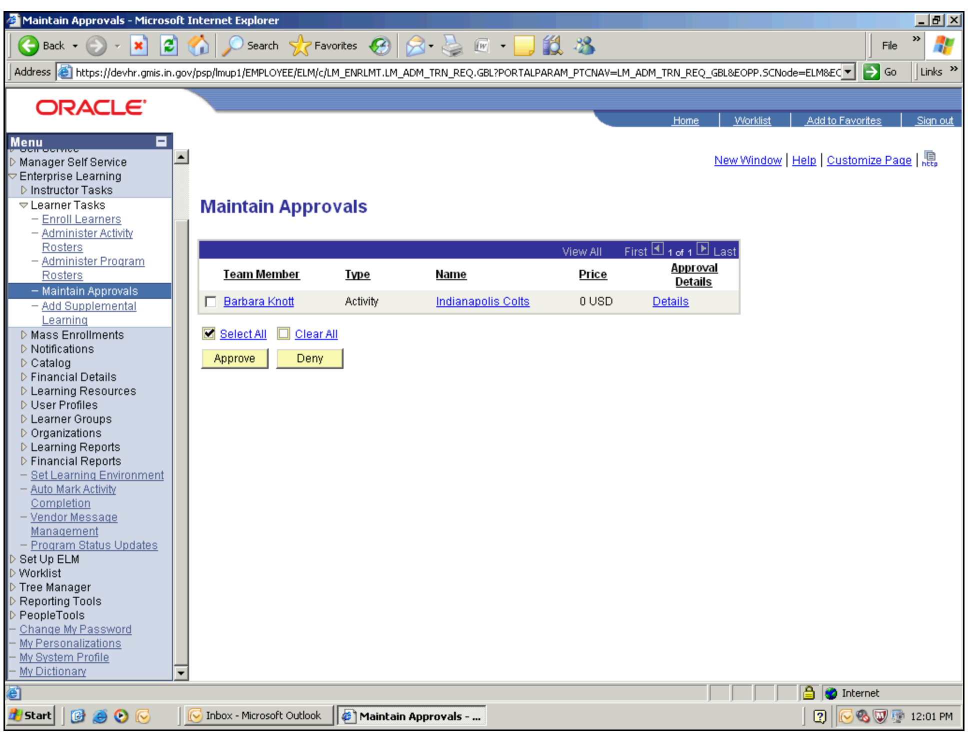
Step	Action
7.	After reviewing the enrollment details, click the **Return to Previous Page** link. Return to Previous Page



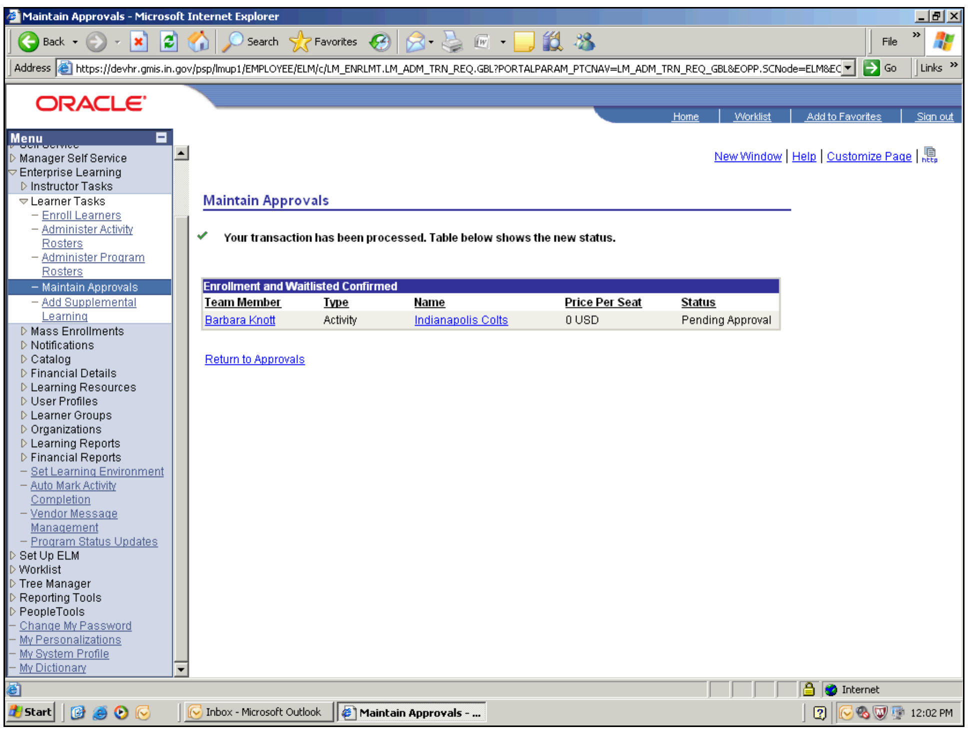
Step	Action
8.	Click the **Details** link in the **Approval Details** column to view an activity's **enrollment details** information. (This information is the same as clicking the activity title link in the **Name** column). Details



Step	Action
9.	After reviewing the enrollment details, click the **Return to Previous Page** link. Return to Previous Page



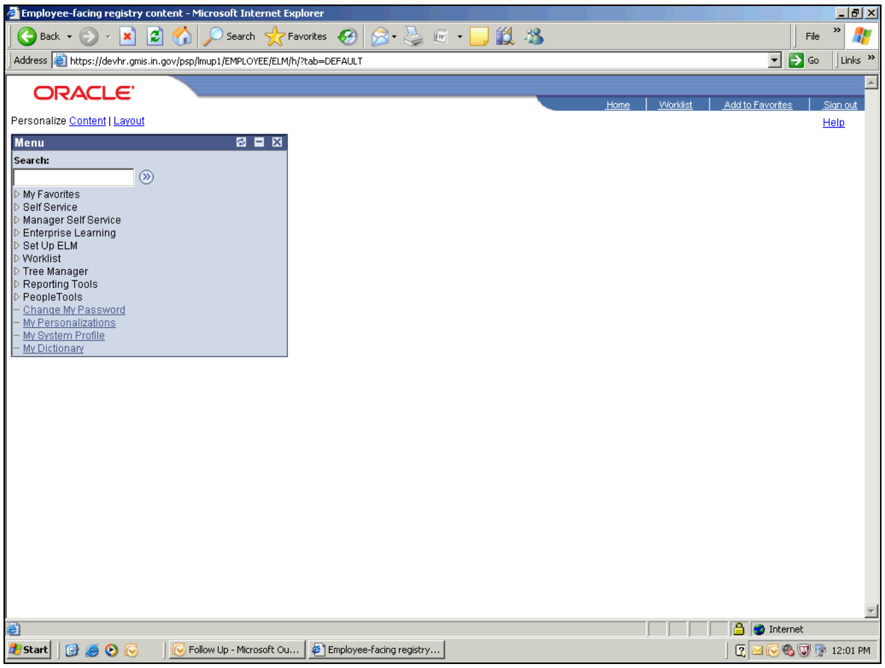
Step	Action
10.	Multiple learners may be selected to perform a single approval or denial action by: - checking the checkboxes of the left of each name in the **Team Member** column or by; - checking the **Select All** checkbox located under the list of team members to select all of the learners in the list (to clear all team member selections, check the **Clear All** checkbox). Select All
11.	Click the **Approve** button to authorize an activity enrollment or click the **Deny** button to not authorize an activity enrollment. Approve



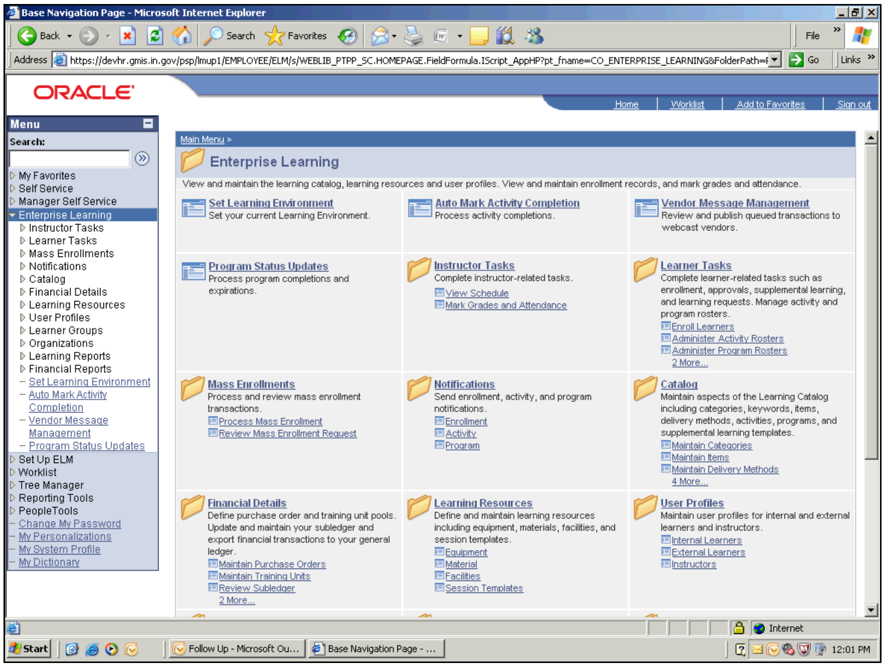
Step	Action
12.	After reviewing the updated status of the selected team member(s) in the **Status** column of the **Maintain Approvals** page, click the **Return to Approvals** link to review additional enrollment requests as needed. Return to Approvals
13.	Congratulations! You have successfully approved or denied an activity enrollment request. **End of Procedure.**

User Profiles

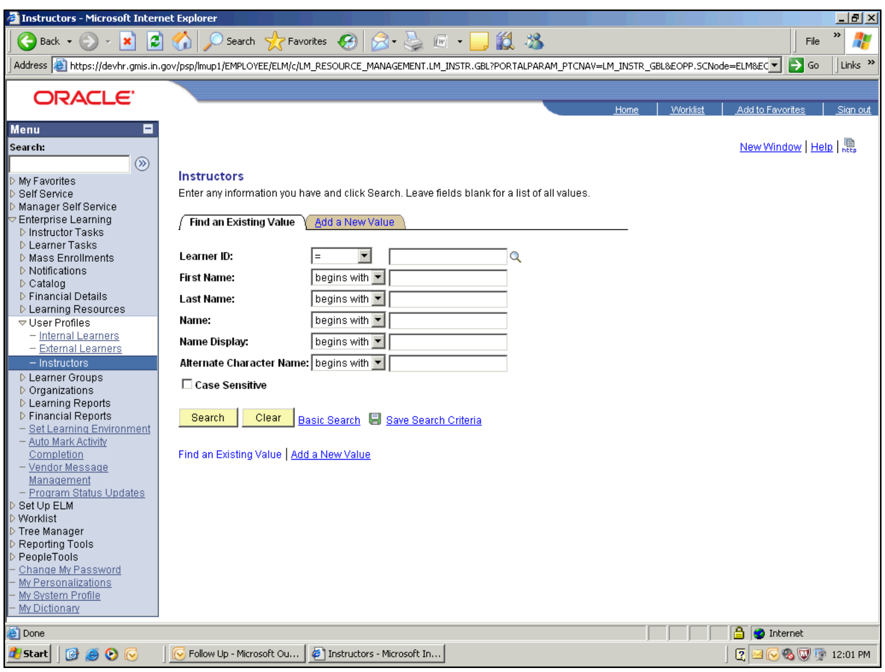
How to Add/Update an Instructor Profile



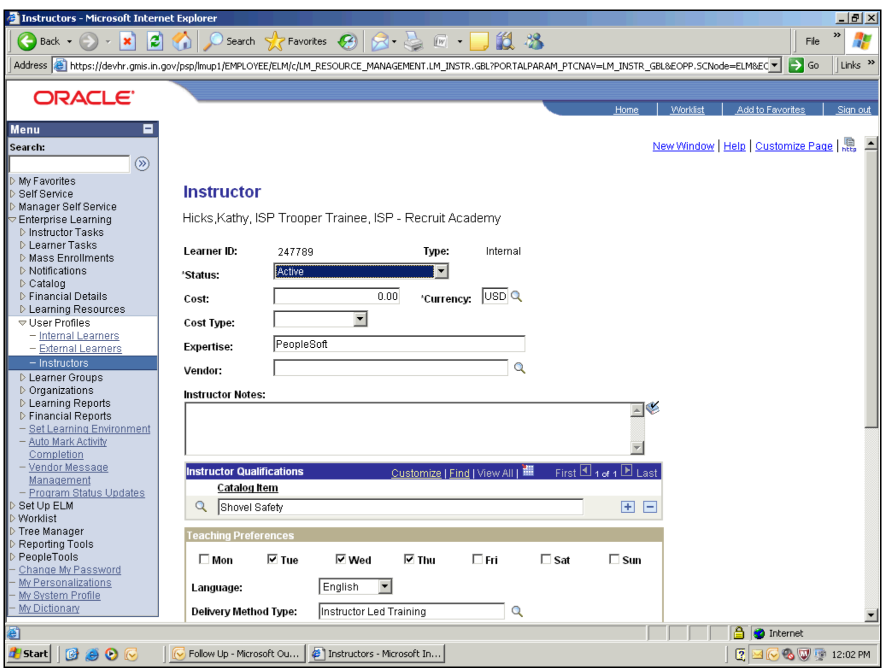
Step	Action
14.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



Step	Action
15.	Click the **User Profiles** link. User Profiles
16.	Click the **Instructors** link. Instructors

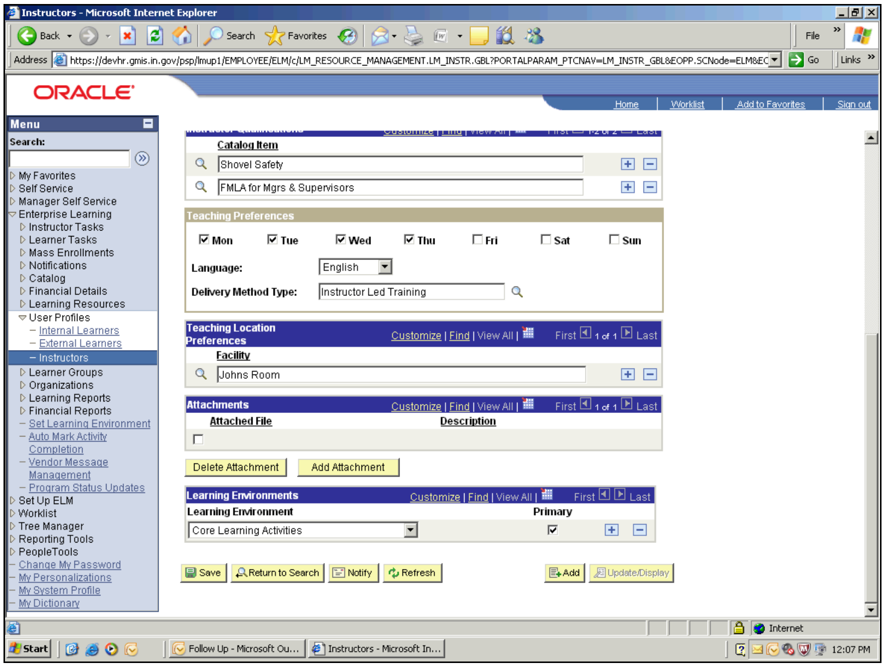


Step	Action
17.	Click the **Add a New Value** tab. Add a New Value
18.	Click the **Look up Learner ID (Alt+5)** button.
19.	Enter the desired information into the **Last Name** field. Enter "**hicks**".
20.	Click in the **First Name** field.
21.	Enter the desired information into the **First Name** field. Enter "**kathy**".
22.	Click the **Look Up** button. Look Up
23.	Click an entry in the **Last Name** column. HICKS
24.	Click the **Add** button. Add
25.	Click an entry in the **Learner ID** column. 247789

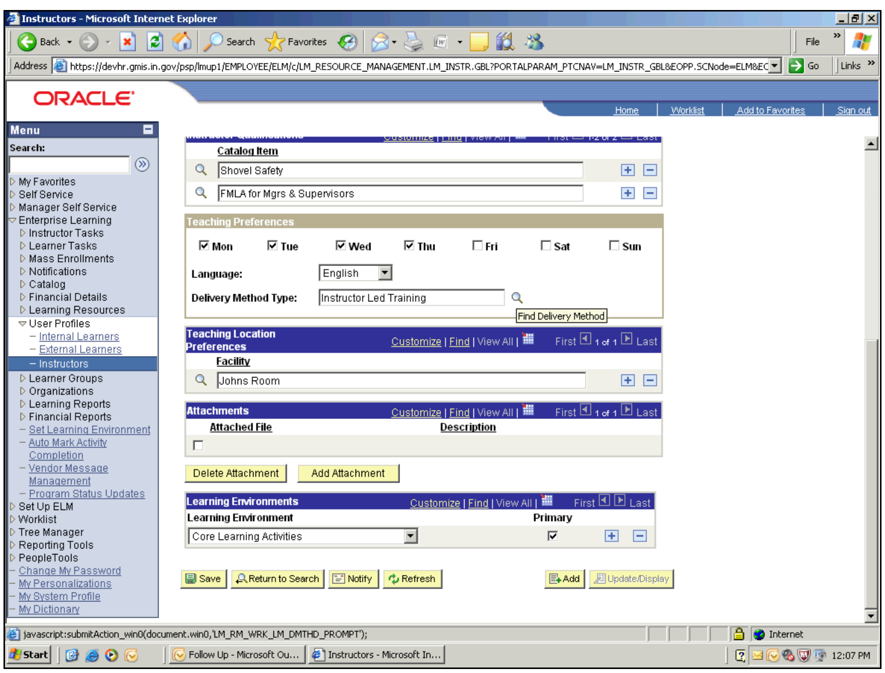


Step	Action
26.	Click the **Status** list. Active

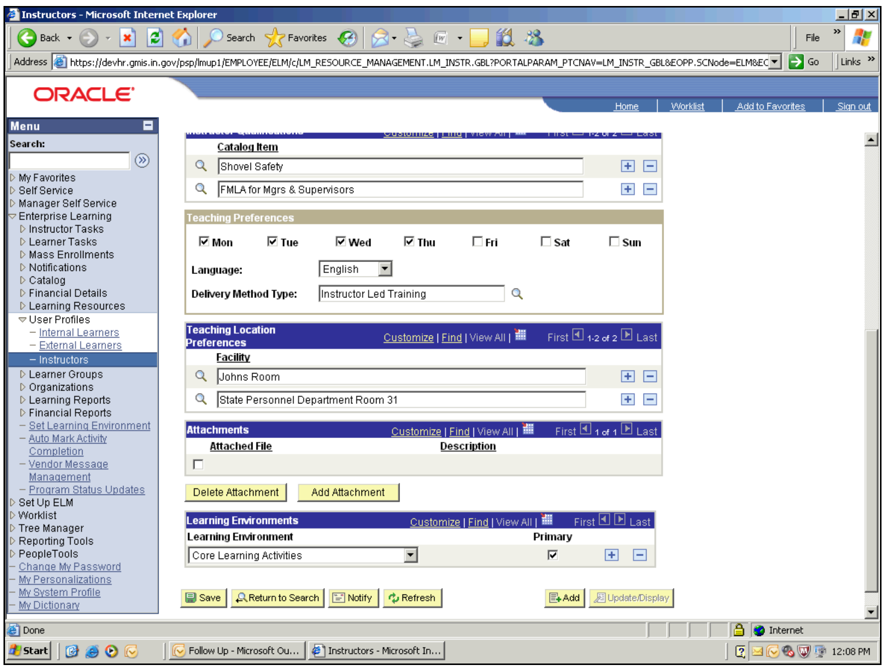
Step	Action
27.	Click the **Active** list item. Active
28.	Click in the **Cost** field. 0.00
29.	Click in the **Currency** field. USD
30.	Click the **Cost Type** list.
31.	Click the list item.
32.	Click in the **Expertise** field. PeopleSoft
33.	Enter the desired information into the **Expertise** field. Enter "**, FMLA**".
34.	Click in the **Vendor Prompt Button** field.
35.	Click in the **Instructor Notes** field.
36.	Click the **Add a new row at row 1 (Alt+7)** button.
37.	Click the **Find Catalog Item** button.
38.	Click in the **Course Code** field.
39.	Enter the desired information into the **Course Code** field. Enter "**DOP**".
40.	Click the **Look Up** button. Look Up
41.	Click an entry in the **Catalog Item** column. FMLA for Mgrs & Supervisors
42.	Release the mouse button.
43.	Click the **Mon** option. Mon



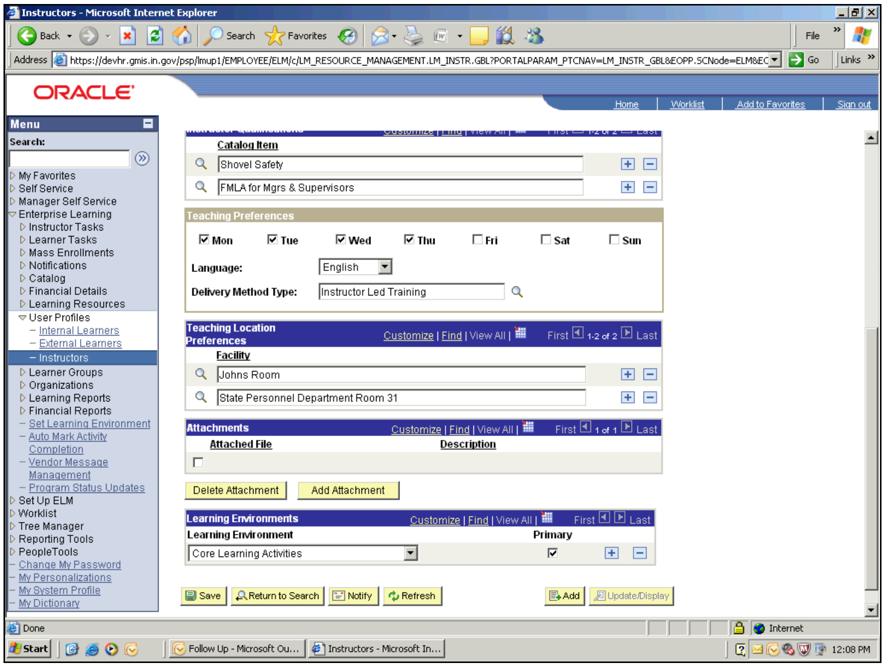
Step	Action
44.	Click the **X (Close)** object.



Step	Action
45.	Click the **Add a new row at row 1 (Alt+7)** button.
46.	Click the **Find Facility** button.
47.	Click an entry in the **Description** column. State Personnel Department Room 31



Step	Action
48.	Click the **X (Close)** object.
49.	Click the **X (Close)** object.

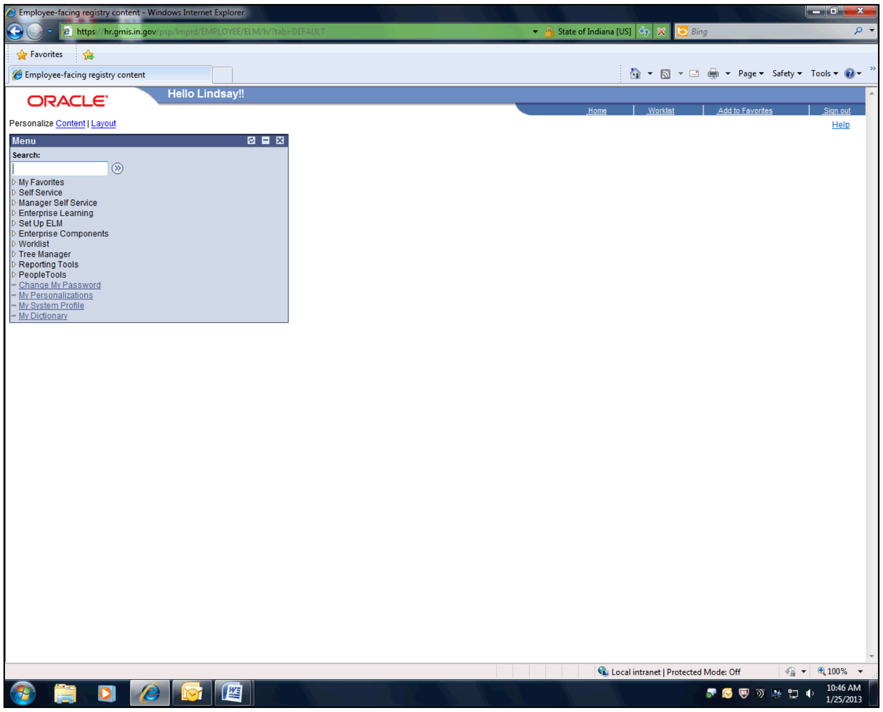


Step	Action
50.	Click the **Save** button. Save
51.	**End of Procedure.**

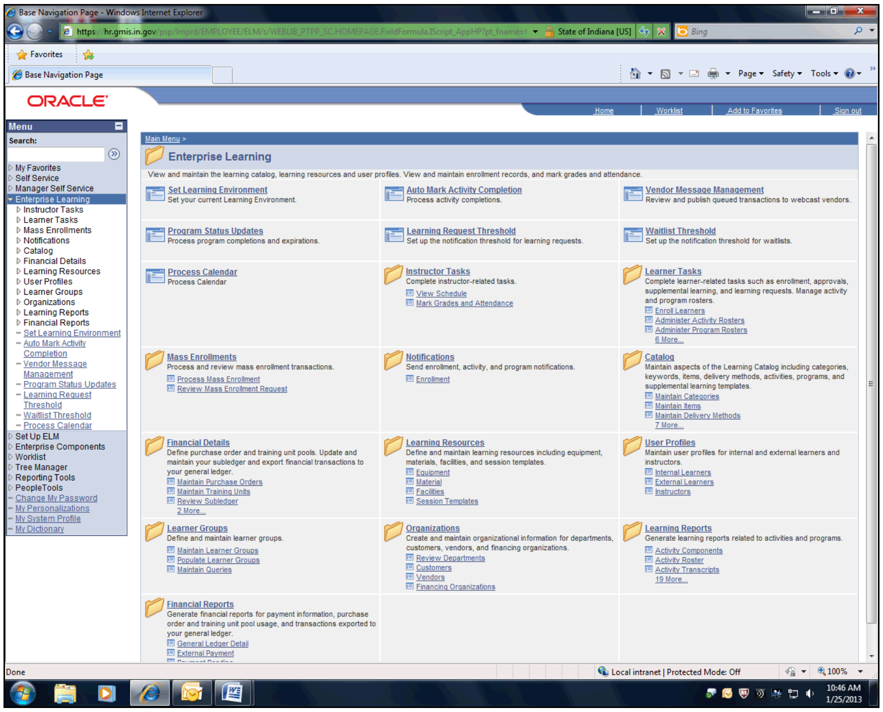
Learning Reports

Enterprise Learning Management provides administrators support features in the **Learner Reports** folder that can be used to print sign in sheets, review activity, item and program components, and monitor and track activity and program completions.

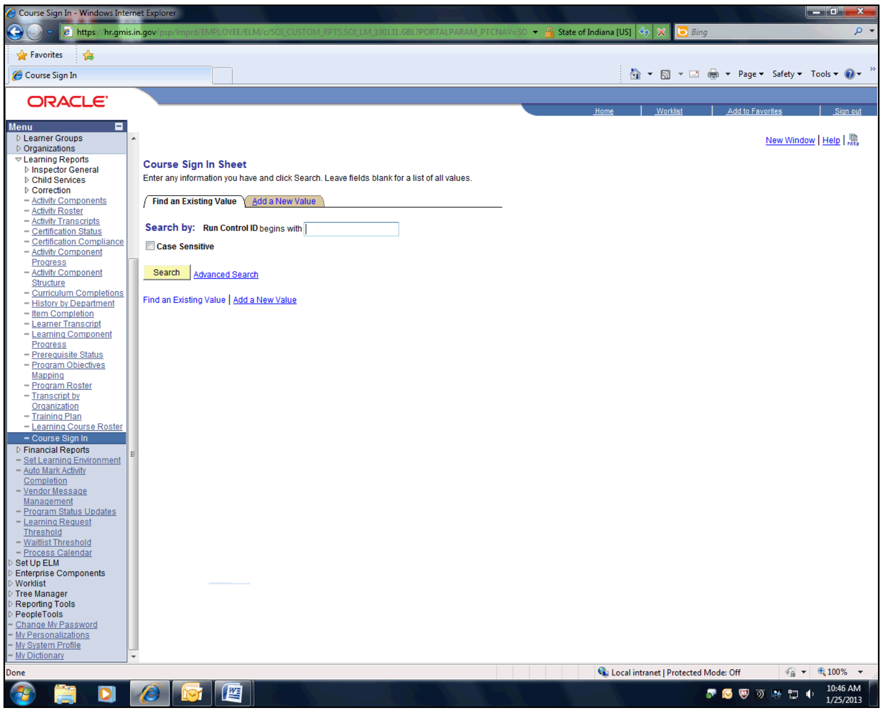
How to Process a Sign-In Sheet



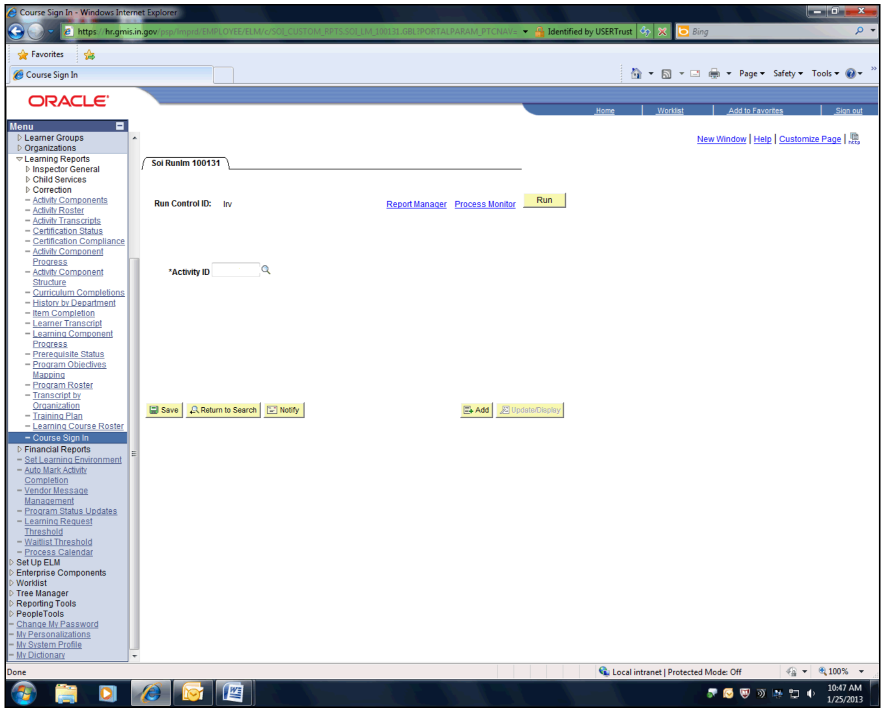
Step	Action
52.	Click the **Enterprise Learning** link. ▷ Enterprise Learning



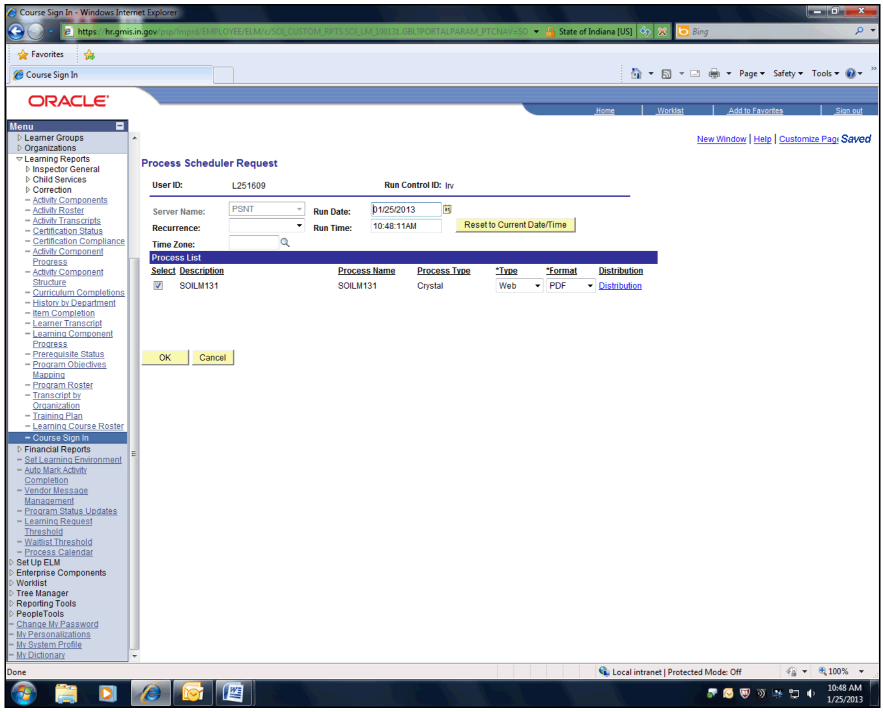
Step	Action
53.	Click the **Learning Reports** link. Learning Reports
54.	Click the **Course Sign In** link. Course Sign In

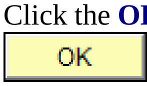


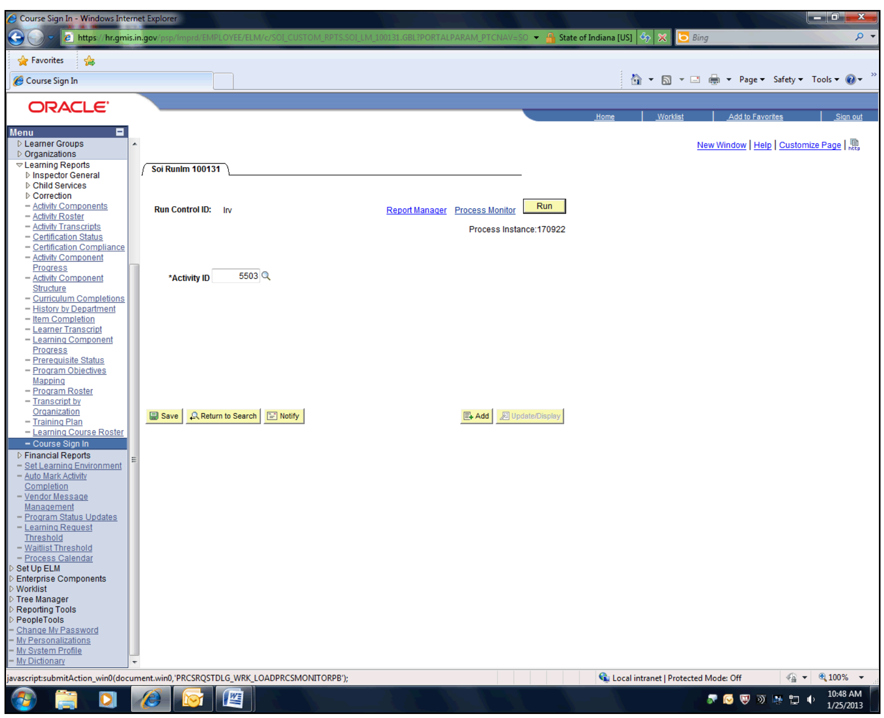
Step	Action
55.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab. Click the **Search** button. Search



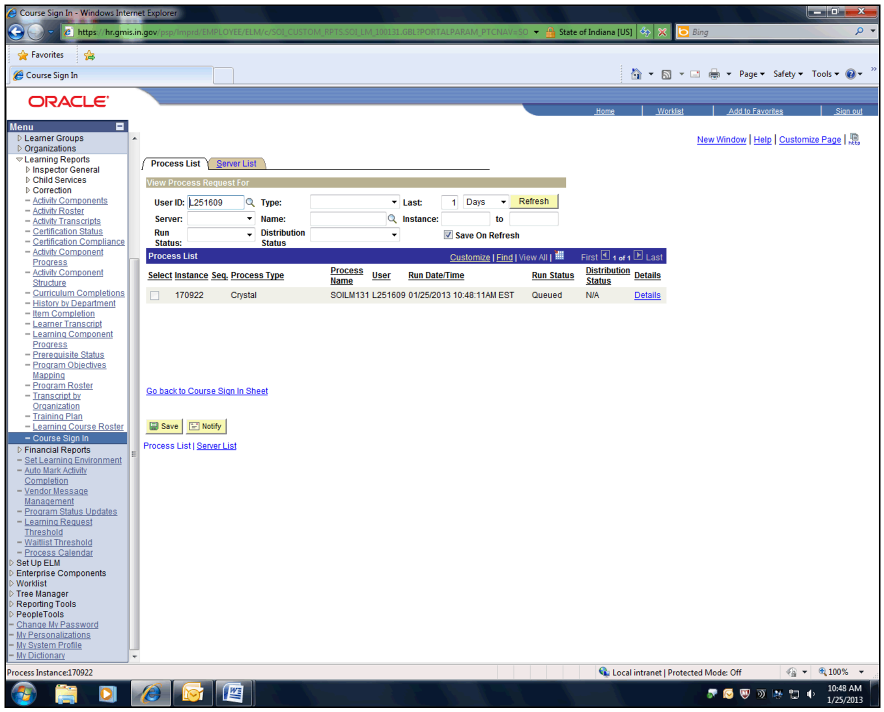
Step	Action
56.	Click the **Look up Activity ID (Alt+5)** button.
57.	Click the **Search by** list.
58.	Click the **Activity Code** list item. Activity Code
59.	Click the **Activity Code** link. SPD_00004_061412 06/14/2012
60.	Click the **Run** button. Run



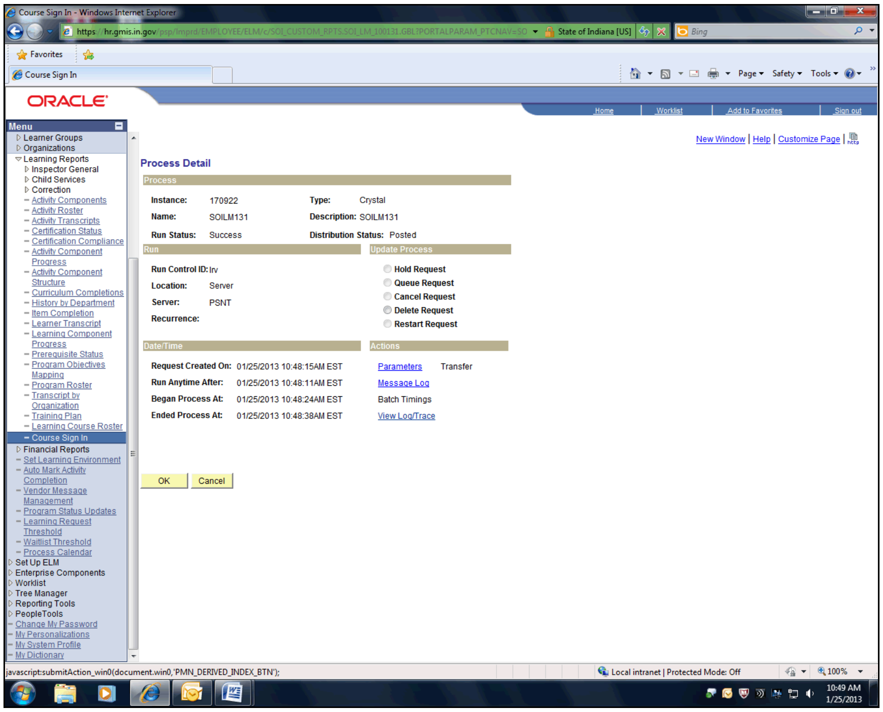
Step	Action
61.	Click the **OK** button. 



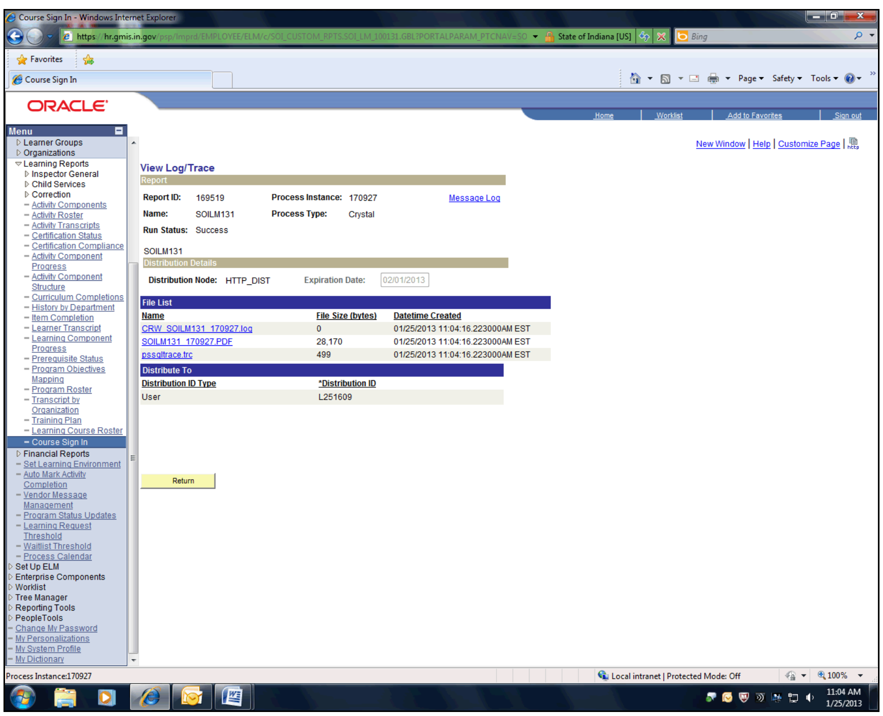
Step	Action
62.	Click the **Process Monitor** link. Process Monitor



Step	Action
63.	Click the Refresh button until the **Run Status** column status is Success and the **Distribution Status** column status is Posted. Click the **Refresh** button. Refresh
64.	Click the **Details** link. Details



Step	Action
65.	Click the **View Log/Trace** link. View Log/Trace

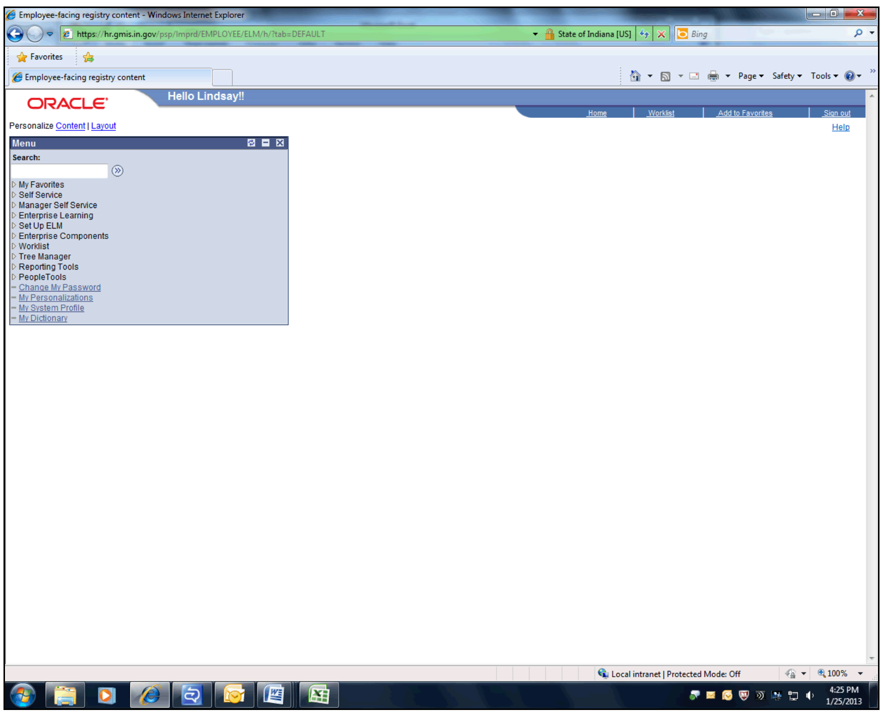


Step	Action
66.	Click the **PDF** link to review the Sign In Sheet and print for class. SOILM131_170927.PDF
67.	You will see all learners who were in an "Enrolled" status. **End of Procedure.**

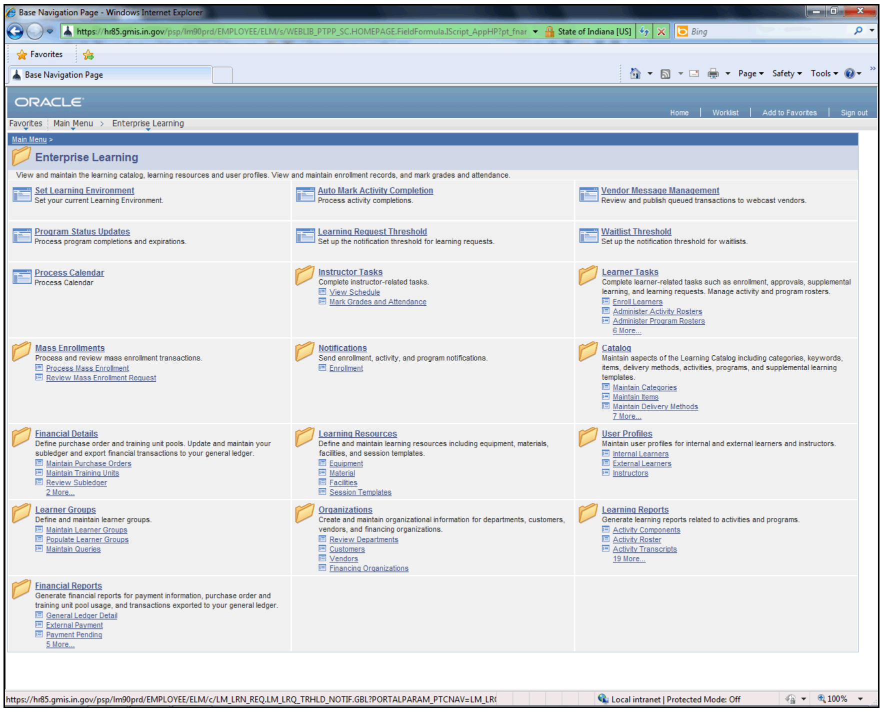
How to Run History by Department Report

How to Run Activity Transcripts Report

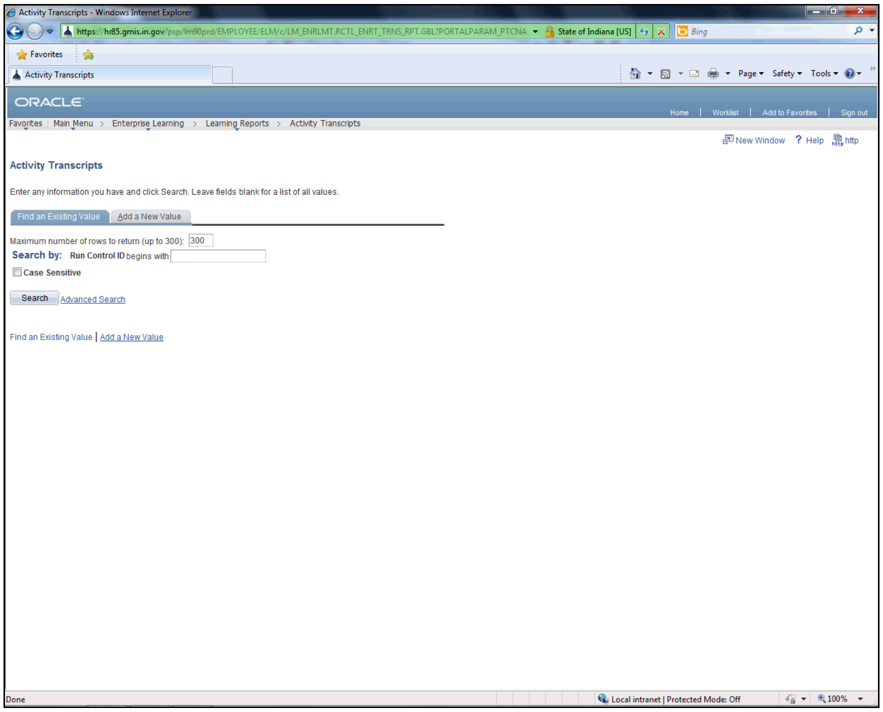
The Activity Transcript report allows you to review course completion information based on course or activity level. This report shows completion status, grade status, and notes (entered by instructor or grader at the Admin Roster Level) for all those with a completed or not completed status.



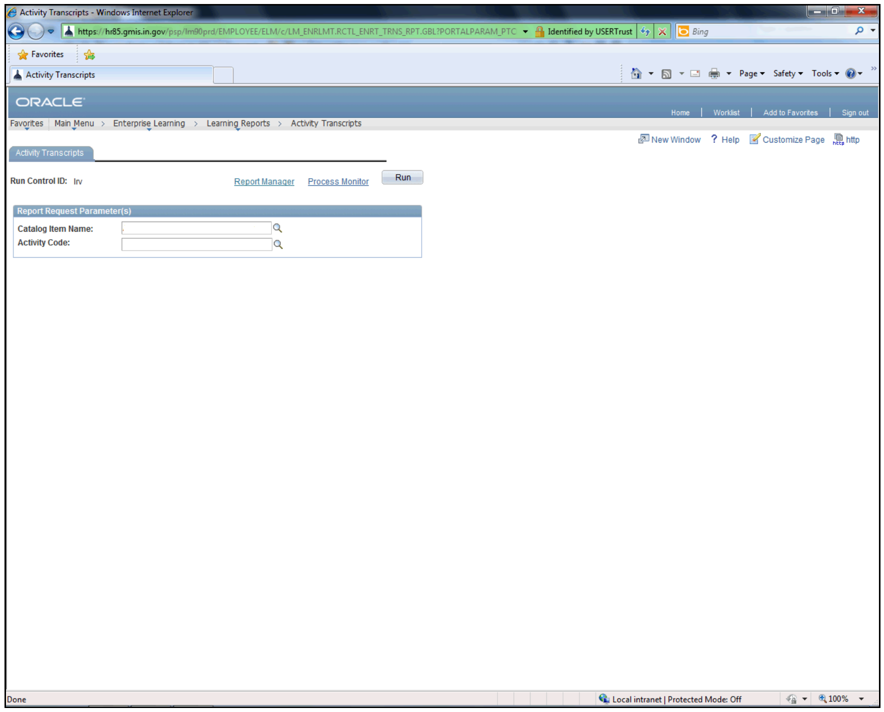
Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning



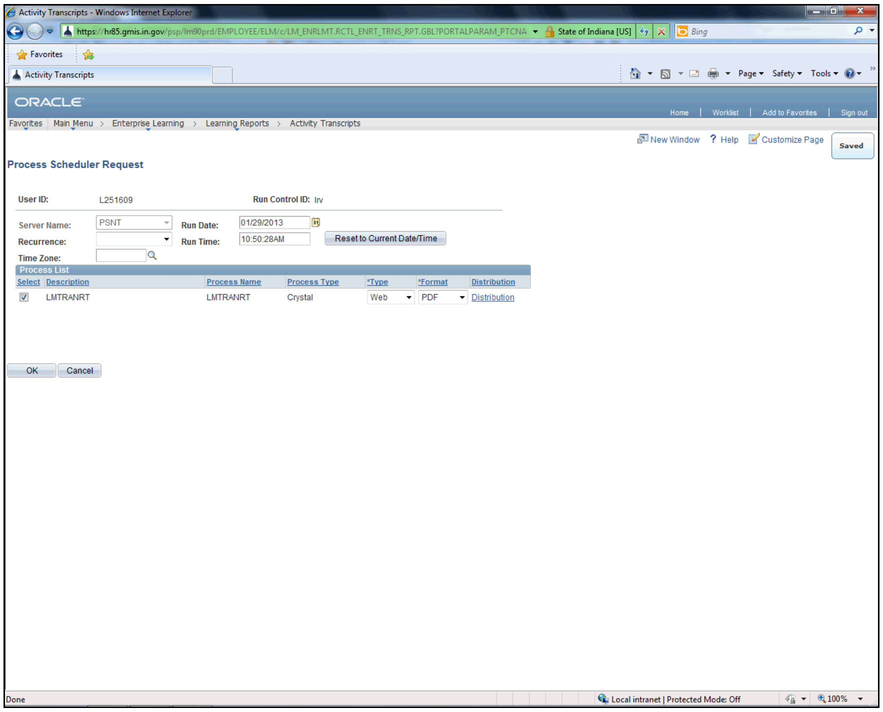
Step	Action
2.	Click the **Learning Reports** link. Learning Reports
3.	Click the **Activity Transcripts** link. Activity Transcripts

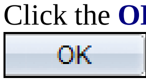


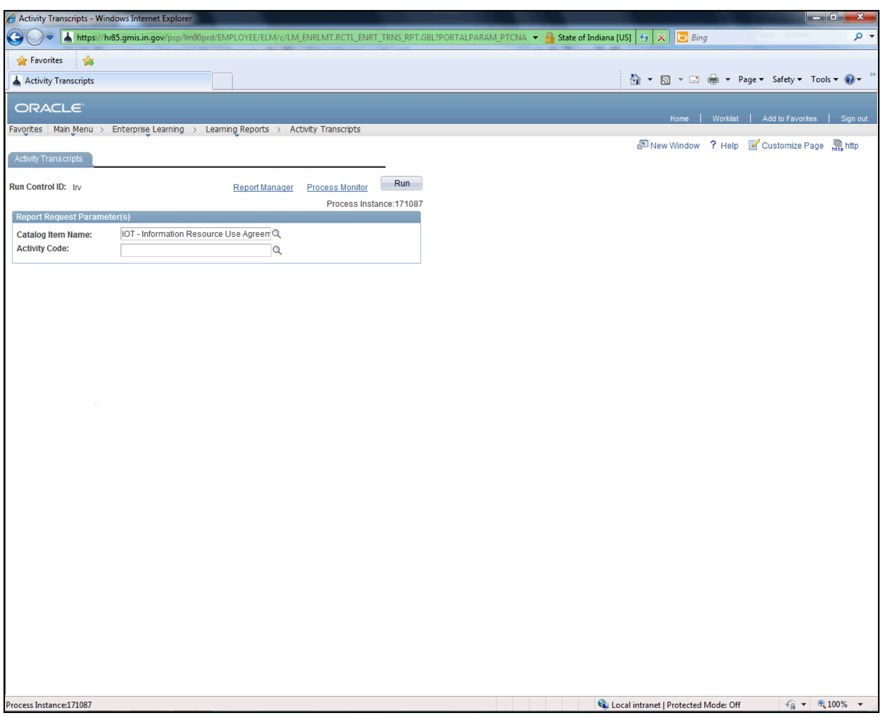
Step	Action
4.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab. Click the **Search** button. Search



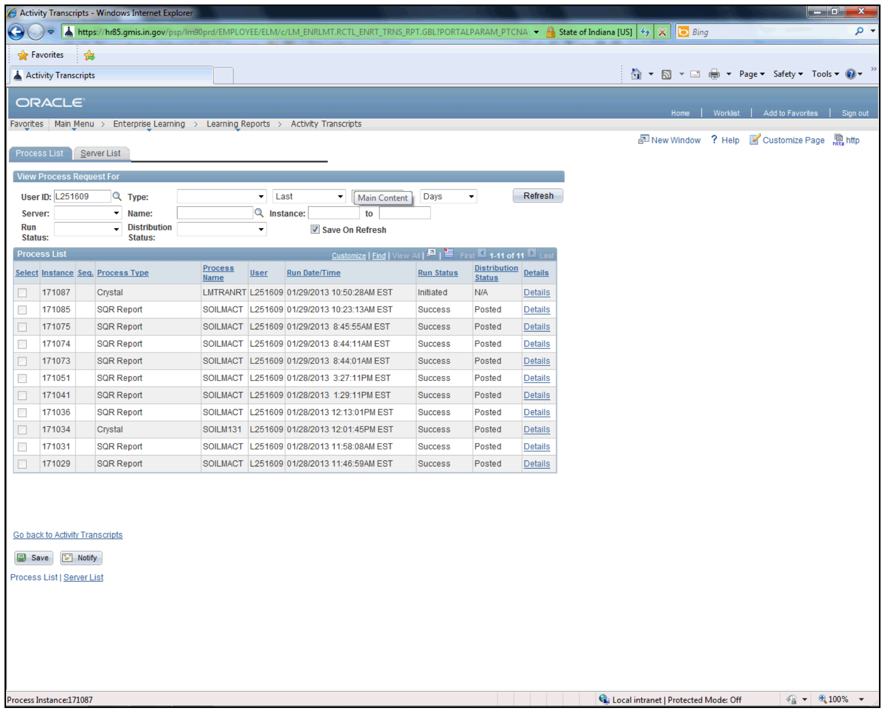
Step	Action
5.	Select the **Report Request Parameter(s)** needed to run the report. You must select a **Catalog Item Name** or **Activity Code** for this report to run to success. **NOTE:** If you are running a report on a Catalog Item Name (i.e. IRUA training) you may want to narrow down the results by also adding the Activity Code into the search parameters. This is only relevant when an Item has multiple activities and it is important to select the right activity. Click the **Activity Code** object.
6.	Click the **Look up Catalog Item ID (Alt+5)** button.
7.	Enter the Course Long Name or click the **Look Up** button. **NOTE:** If you don't know the Course Long Name you can use the Advanced Look Up feature. Click the **Course Long Name** link. IOT - Information Resource Use Agreement Training
8.	Click the **Run** button. Run



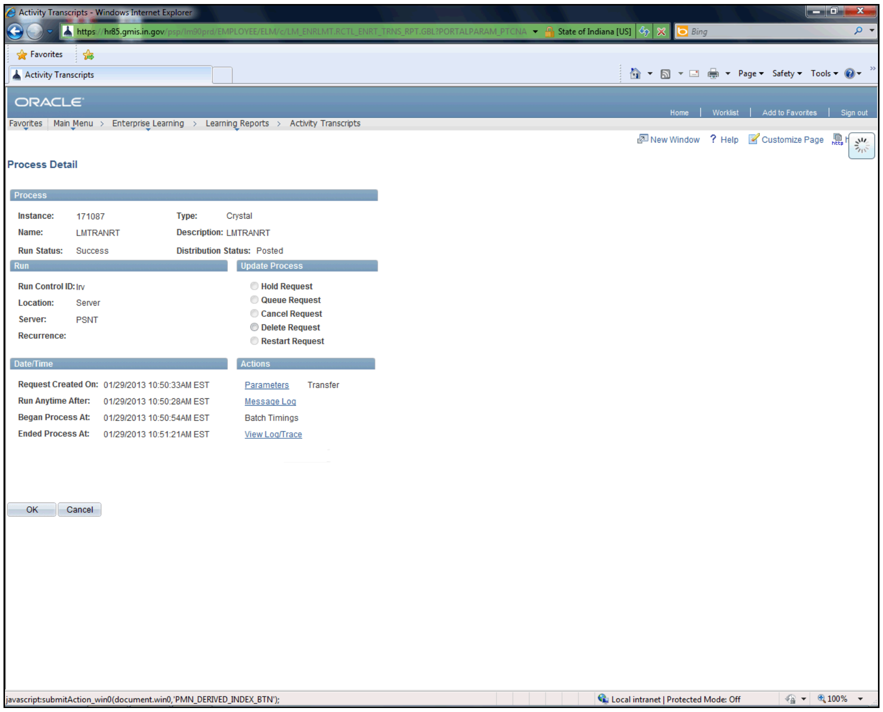
Step	Action
9.	Click the **OK** button. 



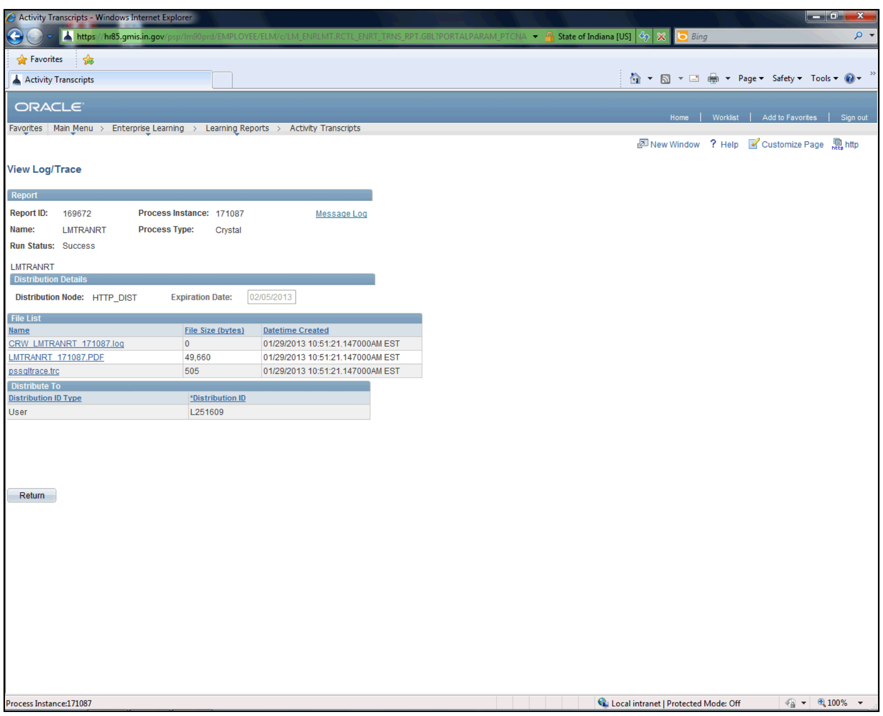
Step	Action
10.	Click the **Process Monitor** link. Process Monitor



Step	Action
11.	Click the Refresh button until the **Run Status** column status is Success and the **Distribution Status** column status is Posted. Click the **Refresh** button. Refresh
12.	Click the **Details** link. Details



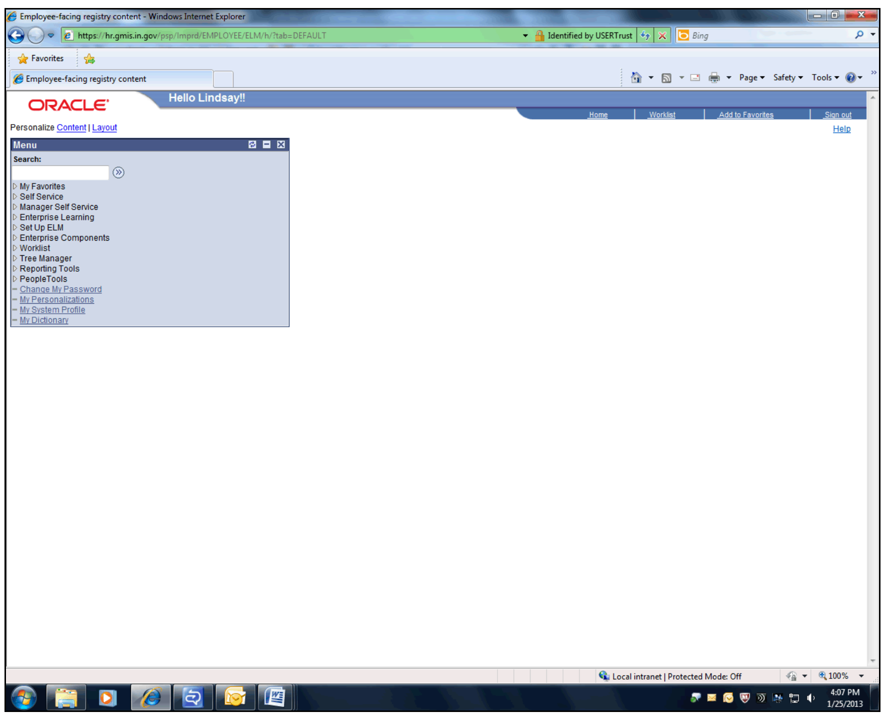
Step	Action
13.	Click the **View Log/Trace** link. View Log/Trace



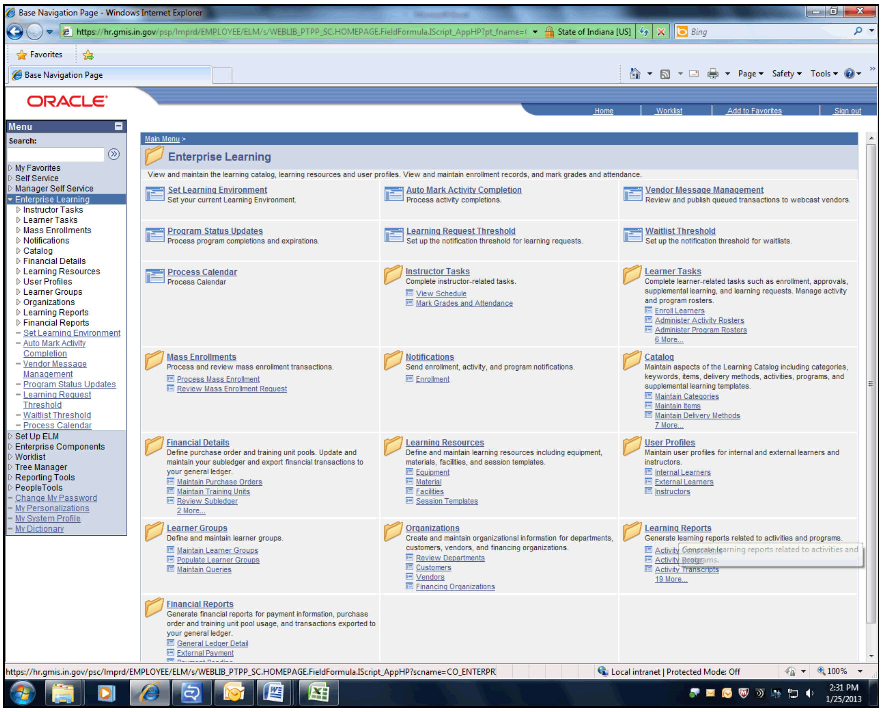
Step	Action
14.	Click the **PDF** link to review the Activity Transcript report. LMTRANRT_171087.PDF
15.	**End of Procedure.**

How to Run a Learner Transcript Report

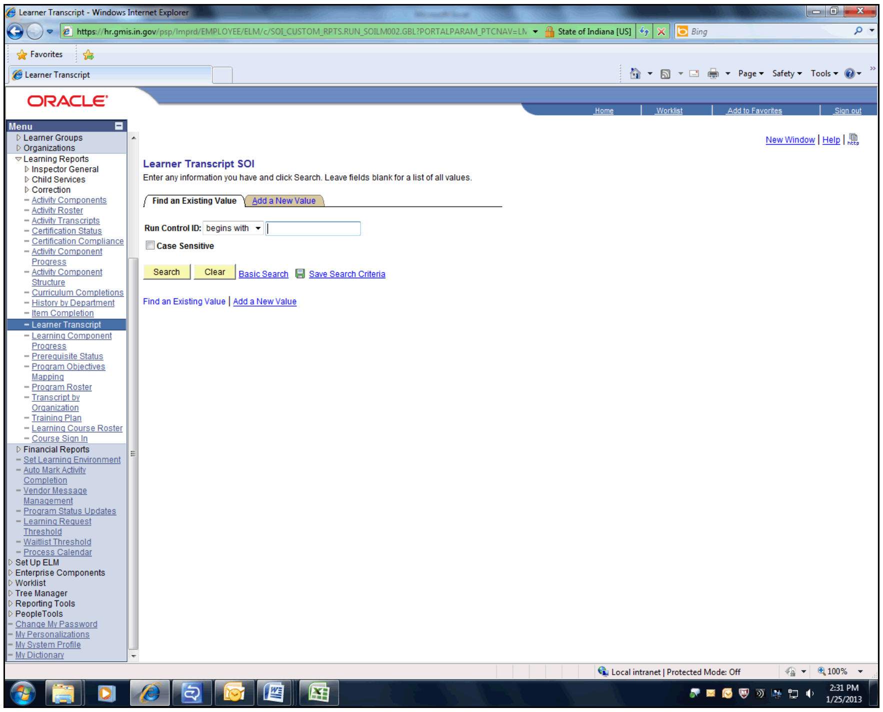
The Learner Transcript report is a SOI DOC customization of the delivered Learner Transcript. This report lists a summary of completed learning and grades for a learner.

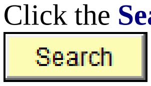


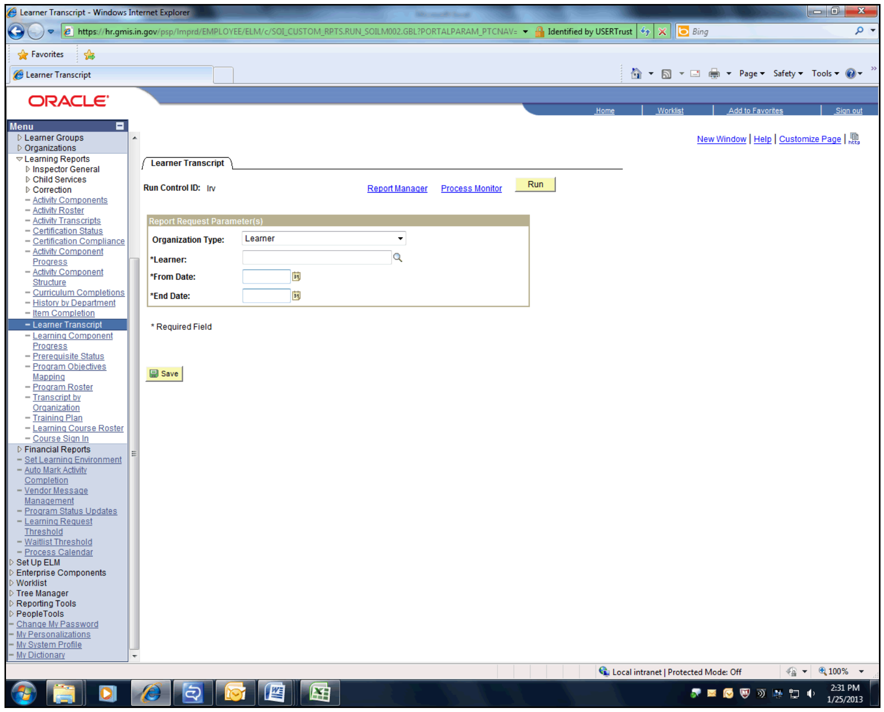
Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning



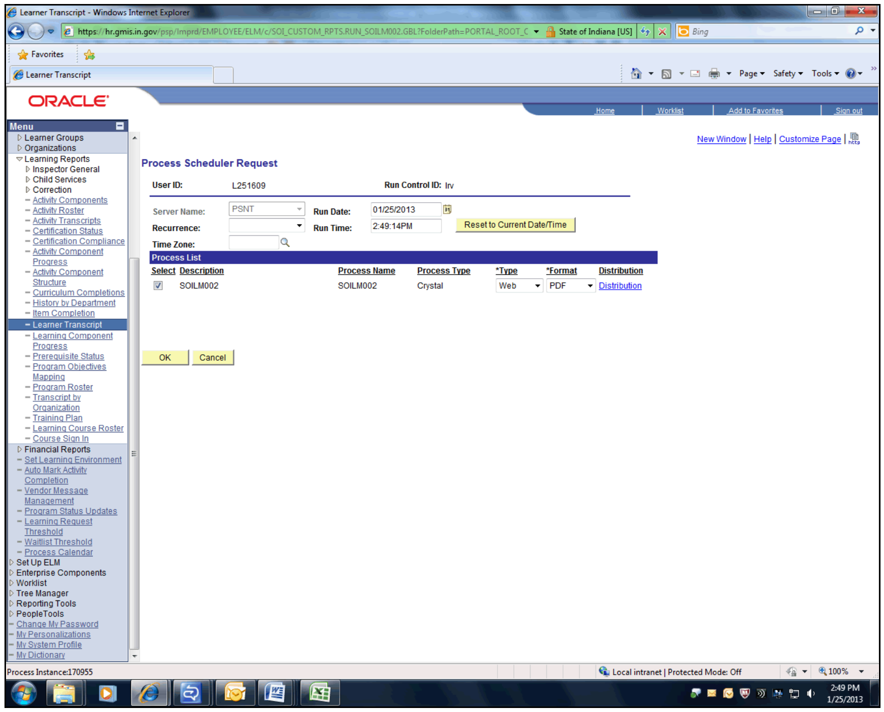
Step	Action
2.	Click the **Learning Reports** link. Learning Reports
3.	Click the **Learner Transcript** link. Learner Transcript

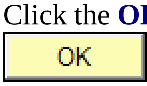


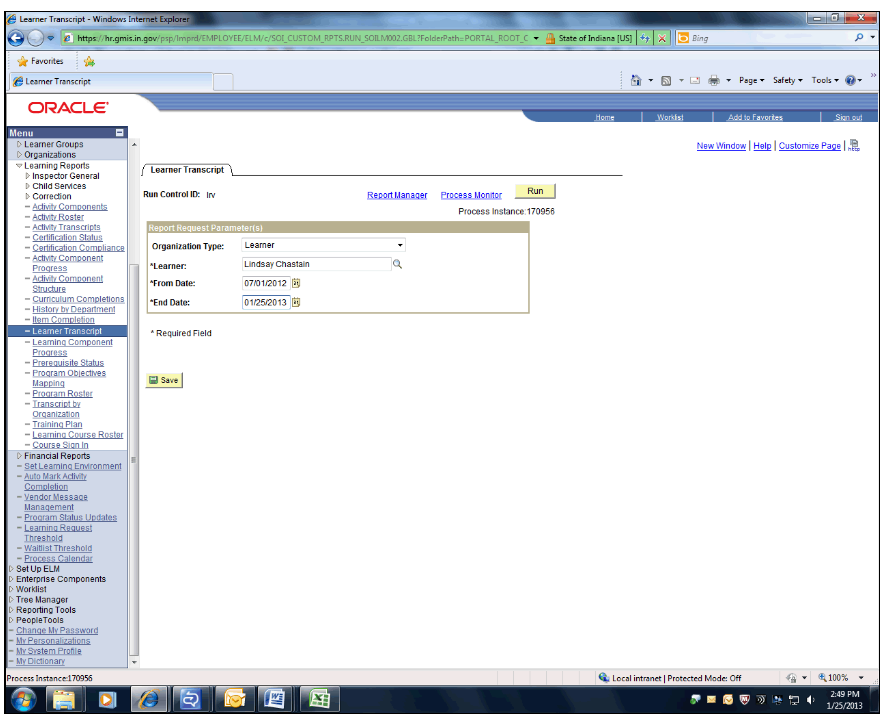
Step	Action
4.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab. Click the **Search** button. 



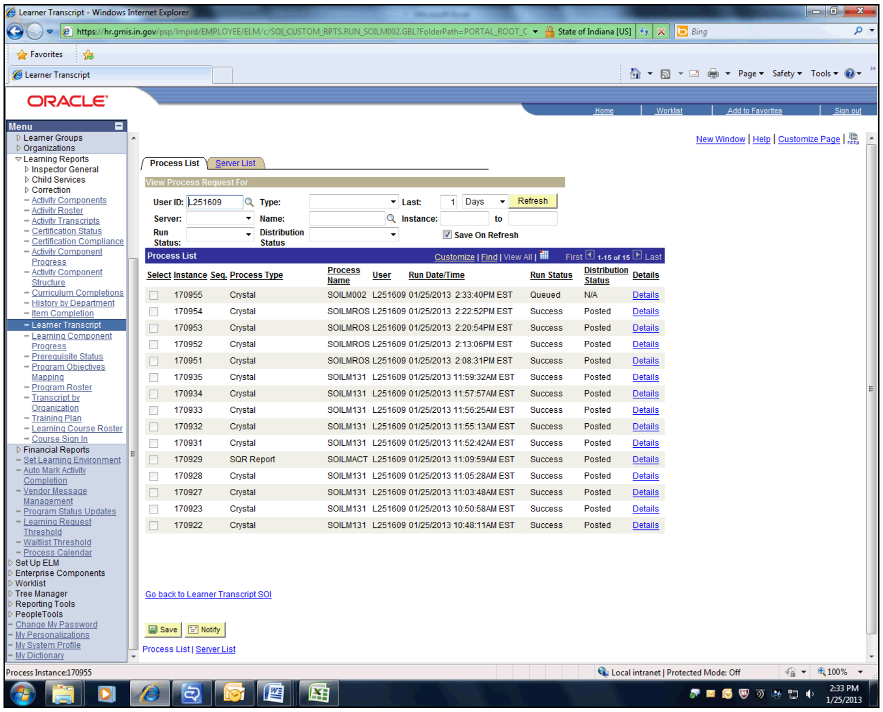
Step	Action
5.	Select the **Report Request Parameter(s)** needed to run the report. **NOTE:** For this report to run to success you must select all required fields which include; learner, from date, and end date. Click the **Look up Person ID (Alt+5)** button to find the learner.
6.	You can type in the Learner ID (different from PeopleSoft ID) or search by First and Last Name. Click the **Look Up** button. Look Up
7.	Click the **Learner ID** link associated to the employee. 249733
8.	Click the **Choose a date (Alt+5)** button to select the "From Date".
9.	Click the **Choose a date (Alt+5)** button to select the "End Date".
10.	Click the **Run** button. Run



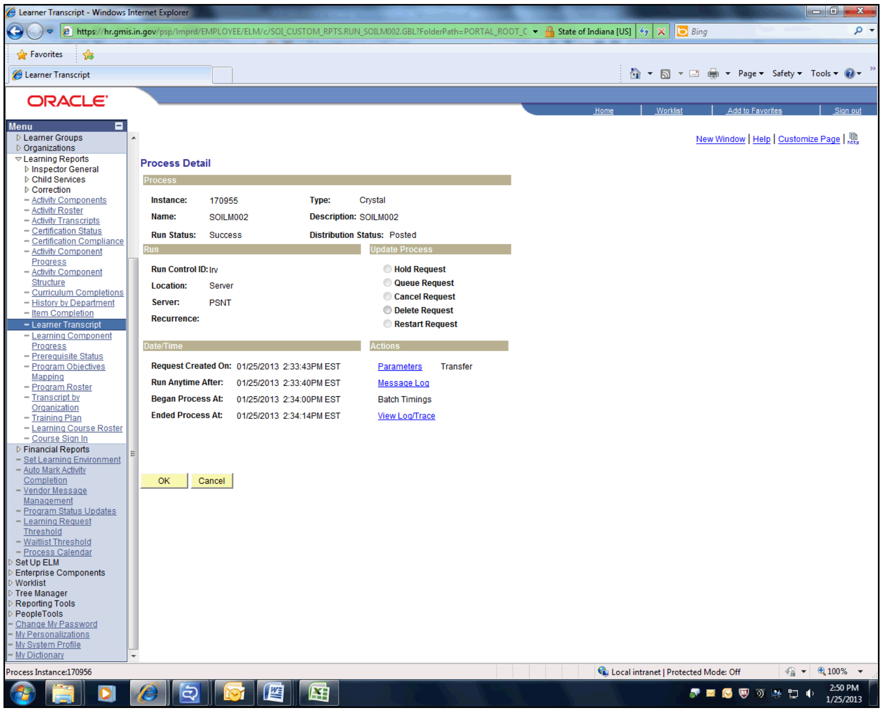
Step	Action
11.	Click the **OK** button. 



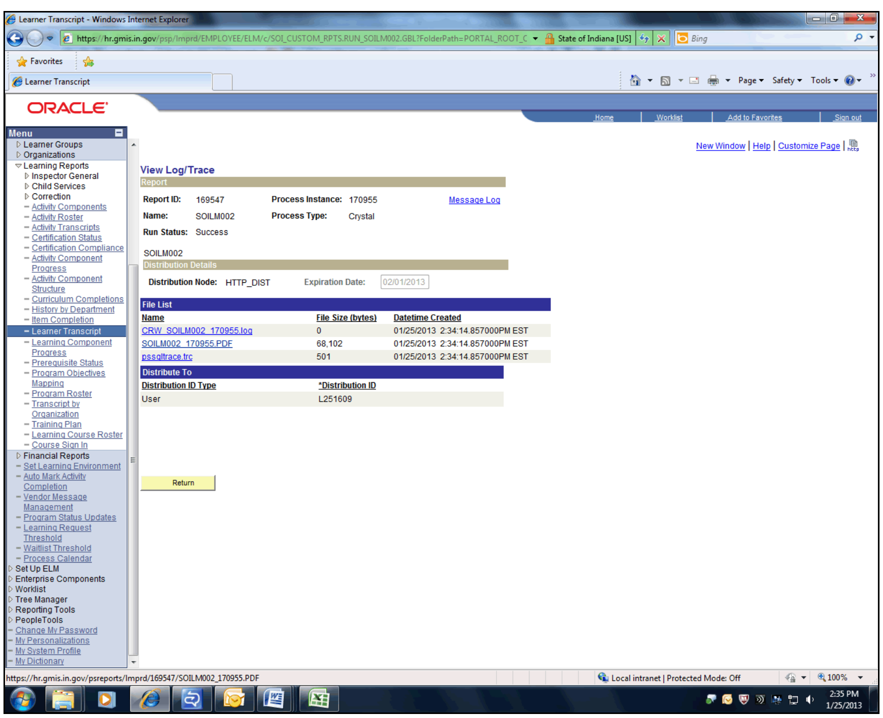
Step	Action
12.	Click the **Process Monitor** link. Process Monitor



Step	Action
13.	Click the Refresh button until the **Run Status** column status is Success and the **Distribution Status** column status is Posted. Click the **Refresh** button. Refresh
14.	Click the **Details** link. Details



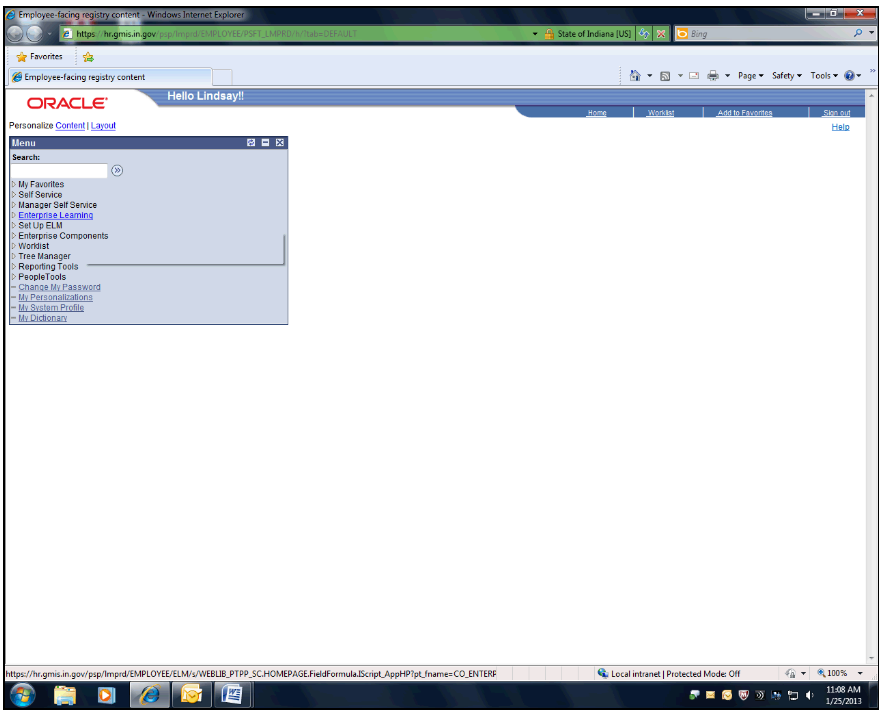
Step	Action
15.	Click the **View Log/Trace** link. View Log/Trace



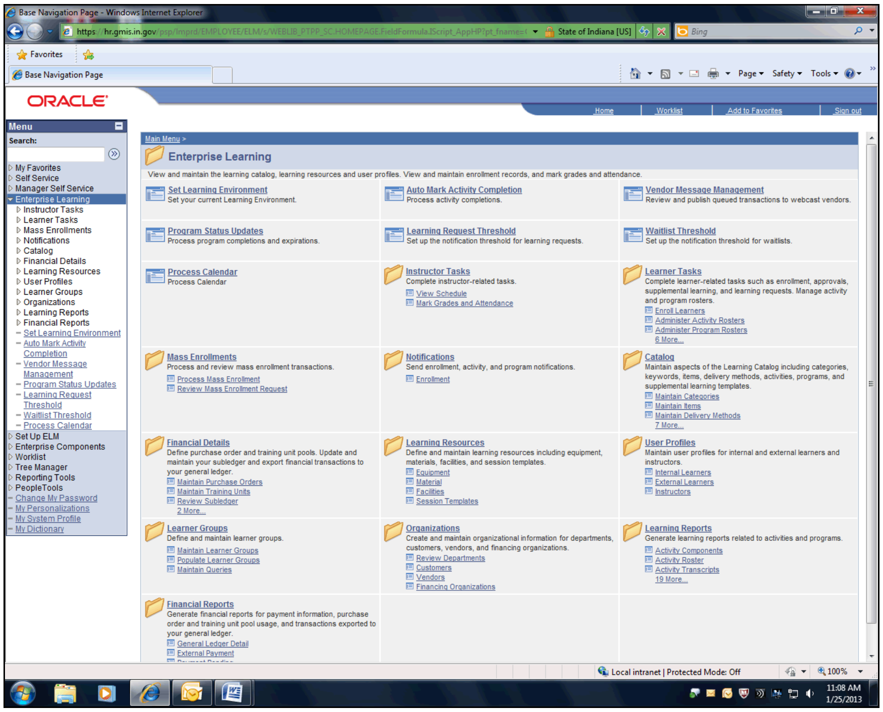
Step	Action
16.	Click the **PDF** link to review the Learner Transcript Report. SOILM002_170955.PDF
17.	**End of Procedure.**

How to Process a Learning Course Roster Report

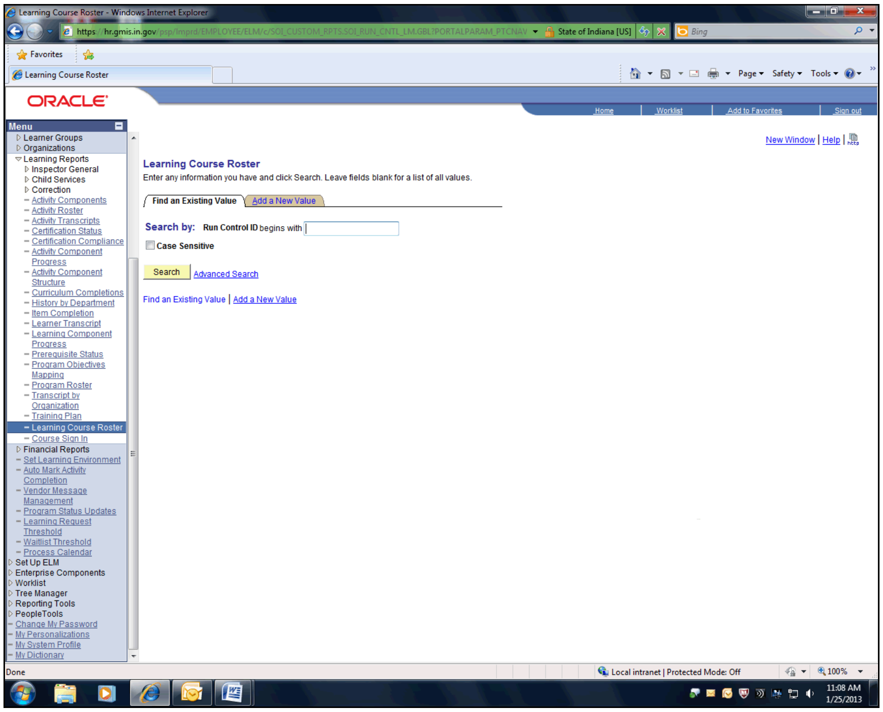
The Learning Course Roster report tracks completion of an activity by the activity code. This report allows you to filter the results by Business Unit and/or Learner Group.



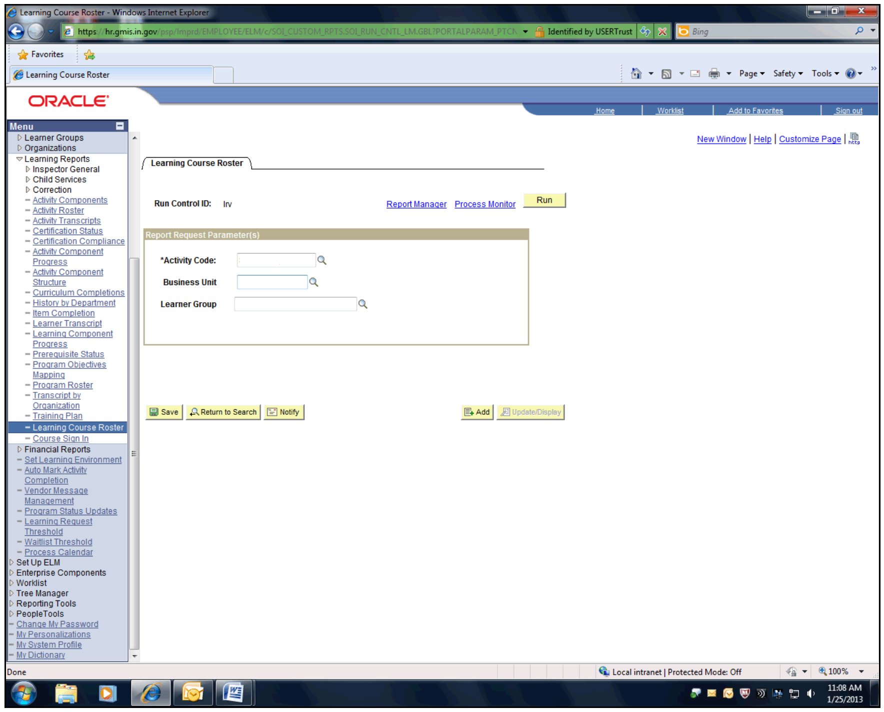
Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning



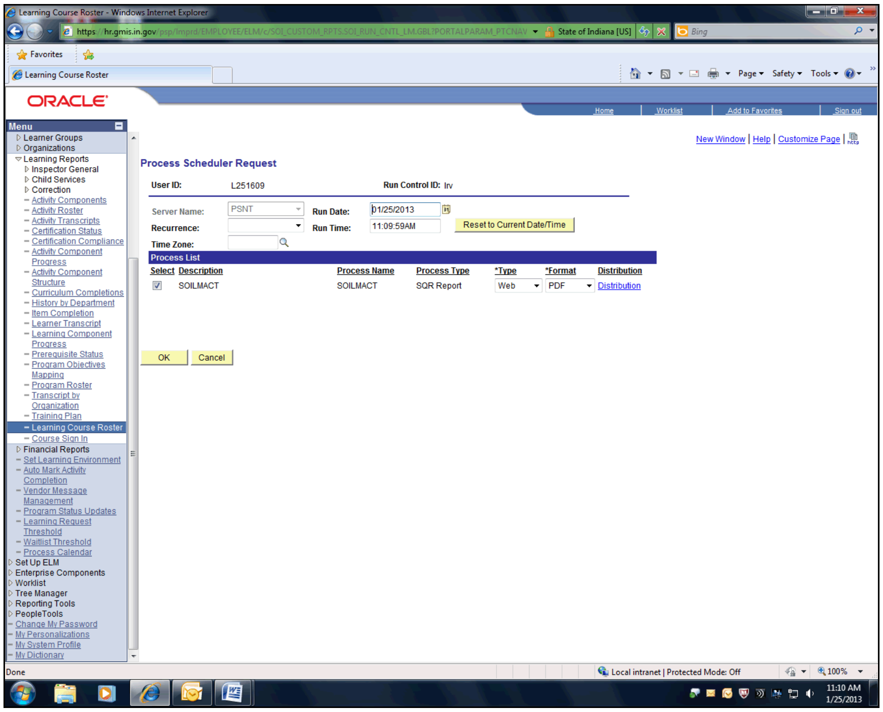
Step	Action
2.	Click the **Learning Reports** link. Learning Reports
3.	Click the **Learning Course Roster** link. Learning Course Roster



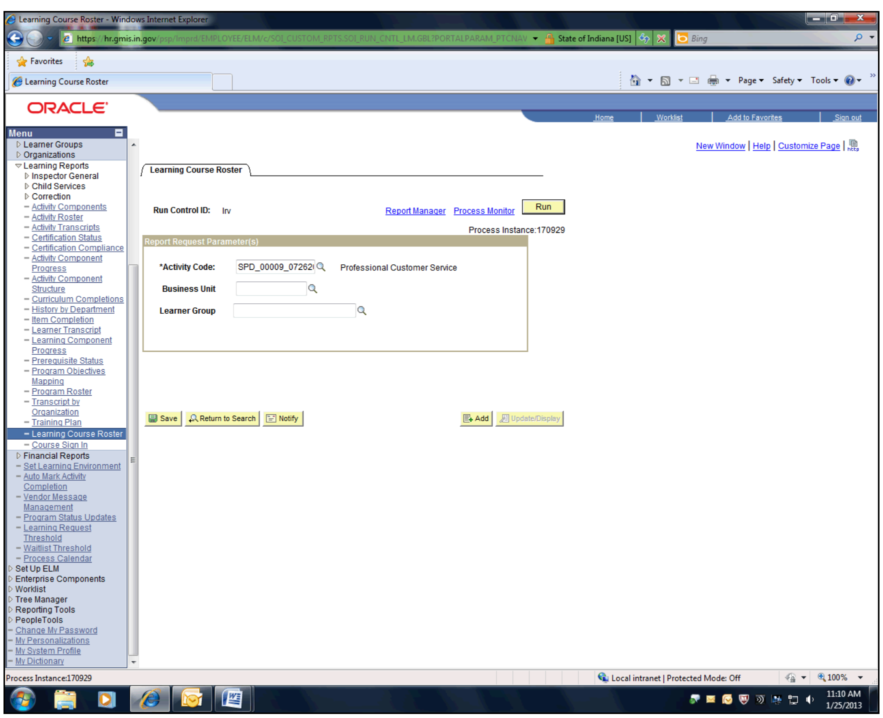
Step	Action
4.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab. Click the **Search** button. Search



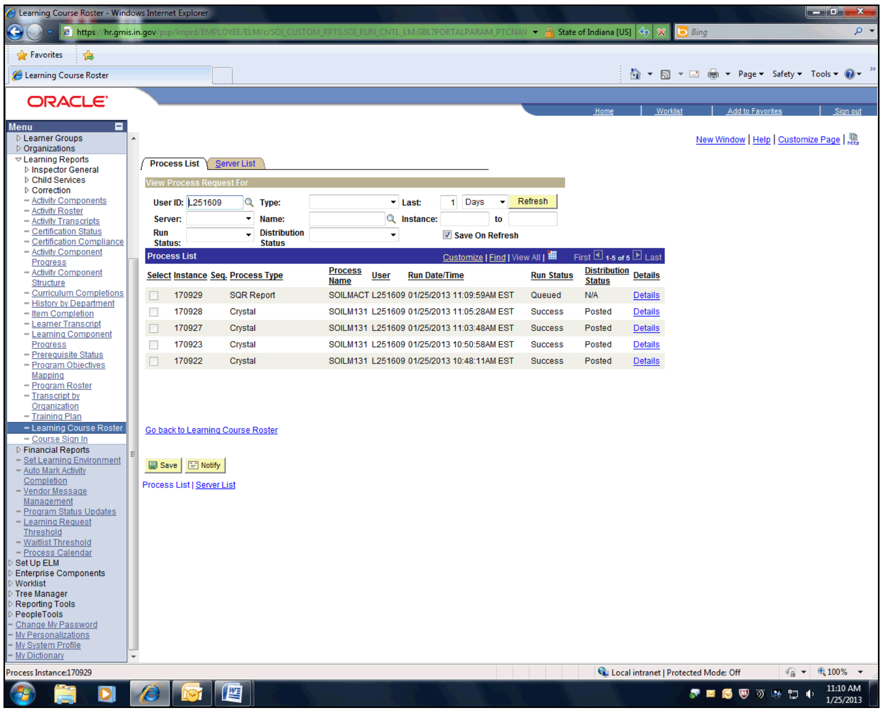
Step	Action
5.	Select the **Report Request Parameter(s)** needed to run the report. You must select an ***Activity Code**, but **Business Unit** and **Learner Group** search fields are optional. **NOTE:** If you are running a report on a large activity (i.e. ethics training) you may want to narrow down the results by searching by Business Unit or Learner Group.
6.	Click the **Look up Activity Code (Alt+5)** button.
7.	Enter the Activity Code and click the **Look Up** button. **NOTE:** If you don't know the Activity Code you can use the Advanced Look Up feature. Look Up
8.	Click the **Activity Code** link that matches the naming convention for the course. SPD 00009 07262012
9.	Click the **Run** button. Run



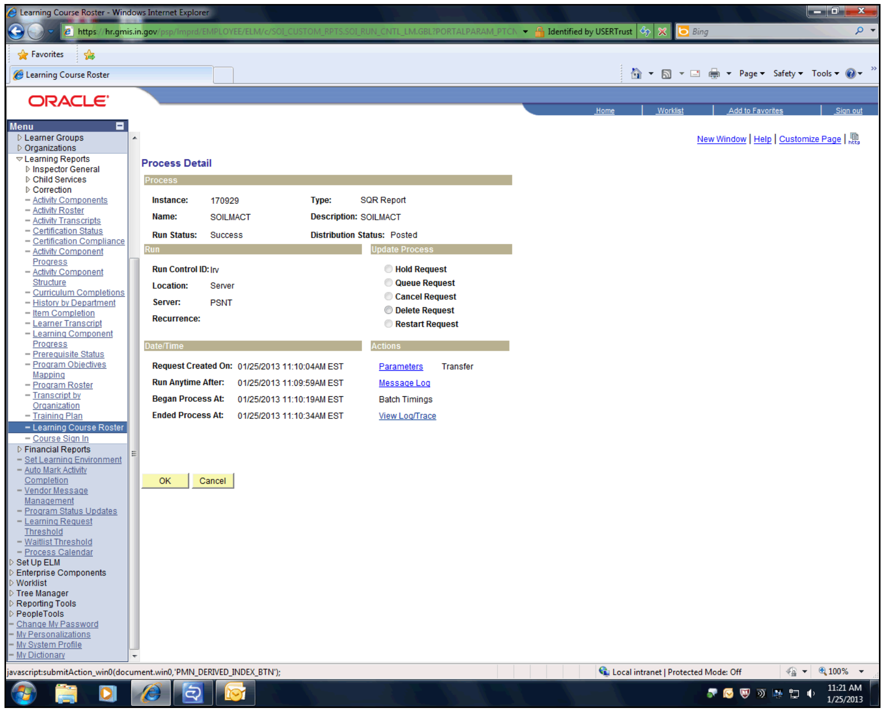
Step	Action
10.	Click the **OK** button. OK



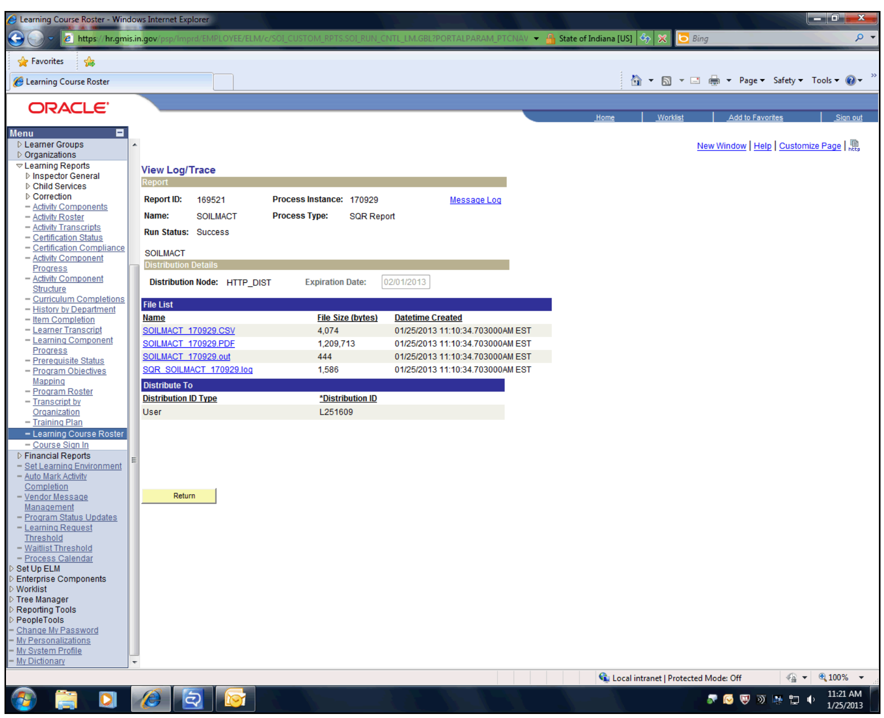
Step	Action
11.	Click the **Process Monitor** link. Process Monitor



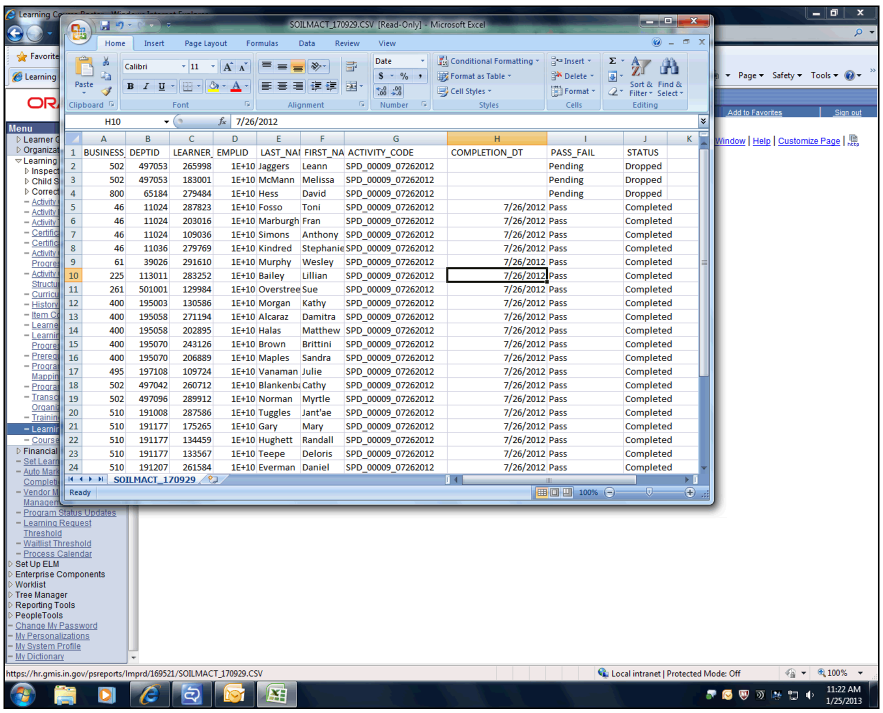
Step	Action
12.	Click the Refresh button until the **Run Status** column status is Success and the **Distribution Status** column status is Posted. Click the **Refresh** button. Refresh
13.	Click the **Details** link. Details



Step	Action
14.	Click the **View Log/Trace** link. View Log/Trace

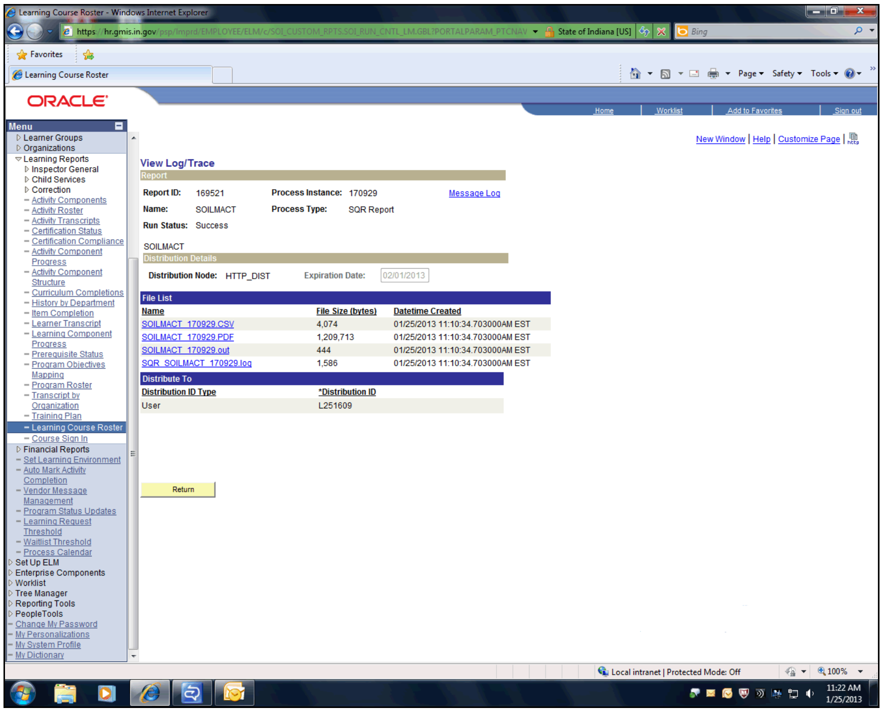


Step	Action
15.	The **Learner Course Roster** report delivers two separate results. The first report is a CSV file. This file will show all enrolled, pending enrollment, complete and in-progress statuses. The CSV file allows you to sort the data. Click the **CSV** link. SOILMACT_170929.CSV

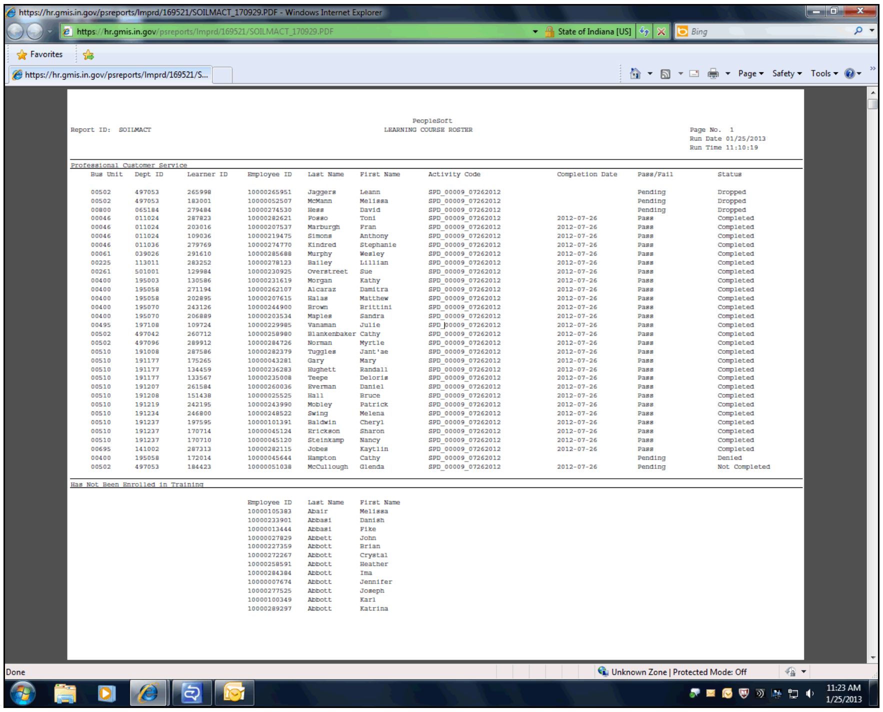


	A	B	C	D	E	F	G	H	I	J
1	BUSINESS_	DEPTID	LEARNER_	EMPLID	LAST_NAI	FIRST_NA	ACTIVITY_CODE	COMPLETION_DT	PASS_FAIL	STATUS
2	502	497053	265998	1E+10	Jaggers	Leann	SPD_00009_07262012		Pending	Dropped
3	502	497053	183001	1E+10	McMann	Melissa	SPD_00009_07262012		Pending	Dropped
4	800	65184	279484	1E+10	Hess	David	SPD_00009_07262012		Pending	Dropped
5	46	11024	287823	1E+10	Fosso	Toni	SPD_00009_07262012	7/26/2012	Pass	Completed
6	46	11024	203016	1E+10	Marburgh	Fran	SPD_00009_07262012	7/26/2012	Pass	Completed
7	46	11024	109036	1E+10	Simons	Anthony	SPD_00009_07262012	7/26/2012	Pass	Completed
8	46	11036	279769	1E+10	Kindred	Stephanie	SPD_00009_07262012	7/26/2012	Pass	Completed
9	61	39026	291610	1E+10	Murphy	Wesley	SPD_00009_07262012	7/26/2012	Pass	Completed
10	225	113011	283252	1E+10	Bailey	Lillian	SPD_00009_07262012	7/26/2012	Pass	Completed
11	261	501001	129984	1E+10	Overstree	Sue	SPD_00009_07262012	7/26/2012	Pass	Completed
12	400	195003	130586	1E+10	Morgan	Kathy	SPD_00009_07262012	7/26/2012	Pass	Completed
13	400	195058	271194	1E+10	Alcaraz	Damitra	SPD_00009_07262012	7/26/2012	Pass	Completed
14	400	195058	202895	1E+10	Halas	Matthew	SPD_00009_07262012	7/26/2012	Pass	Completed
15	400	195070	243126	1E+10	Brown	Brittini	SPD_00009_07262012	7/26/2012	Pass	Completed
16	400	195070	206889	1E+10	Maples	Sandra	SPD_00009_07262012	7/26/2012	Pass	Completed
17	495	197108	109724	1E+10	Vanaman	Julie	SPD_00009_07262012	7/26/2012	Pass	Completed
18	502	497042	260712	1E+10	Blankenba	Cathy	SPD_00009_07262012	7/26/2012	Pass	Completed
19	502	497096	289912	1E+10	Norman	Myrtle	SPD_00009_07262012	7/26/2012	Pass	Completed
20	510	191008	287586	1E+10	Tuggles	Jant'ae	SPD_00009_07262012	7/26/2012	Pass	Completed
21	510	191177	175265	1E+10	Gary	Mary	SPD_00009_07262012	7/26/2012	Pass	Completed
22	510	191177	134459	1E+10	Hughett	Randall	SPD_00009_07262012	7/26/2012	Pass	Completed
23	510	191177	133567	1E+10	Teepe	Deloris	SPD_00009_07262012	7/26/2012	Pass	Completed
24	510	191207	261584	1E+10	Everman	Daniel	SPD_00009_07262012	7/26/2012	Pass	Completed

Step	Action
16.	Review the excel file and when finished click the **Close** button. 



Step	Action
17.	The **Learner Course Roster** report delivers two separate results. The second report is a PDF file. This file will show all enrolled, pending enrollment, complete and in-progress statuses in the top section and all those who have yet to be enrolled in the bottom section. Click the **PDF** link. SOILMACT_170929.PDF



Report ID: SOILMACT

PeopleSoft
LEARNING COURSE ROSTER

Page No. 1
Run Date 01/25/2013
Run Time 11:10:19

Professional Customer Service

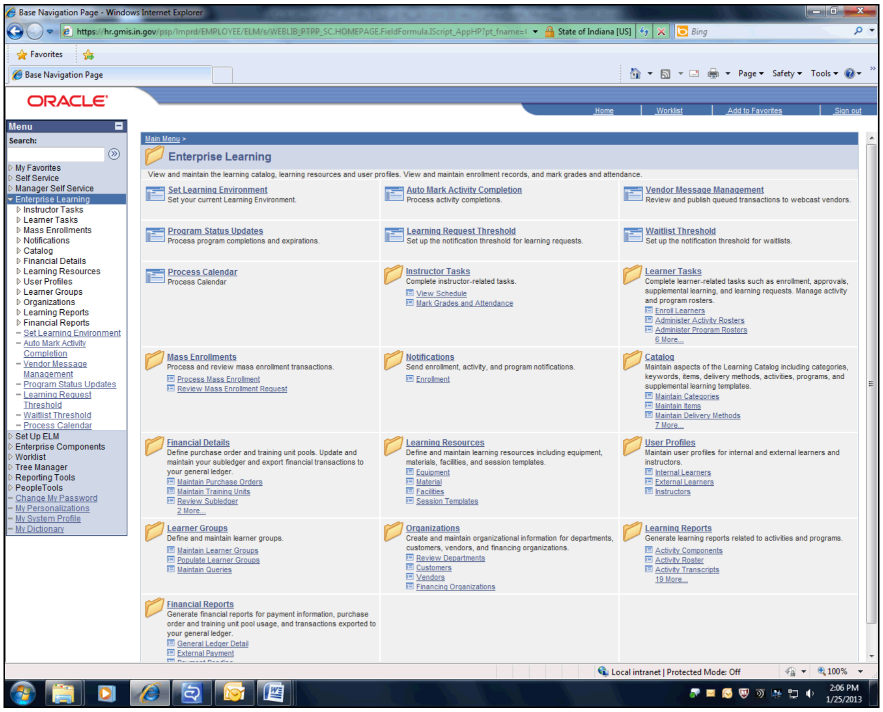
Bus Unit	Dept ID	Learner ID	Employee ID	Last Name	First Name	Activity Code	Completion Date	Pass/Fail	Status
00502	497053	265998	10000265951	Jaggers	Leann	SPD_00009_07262012		Pending	Dropped
00502	497053	183001	10000052507	McMann	Melissa	SPD_00009_07262012		Pending	Dropped
00800	065184	279484	10000274530	Hess	David	SPD_00009_07262012		Pending	Dropped
00046	011024	287823	10000282621	Fosso	Toni	SPD_00009_07262012	2012-07-26	Pass	Completed
00046	011024	203016	10000207537	Marburgh	Fran	SPD_00009_07262012	2012-07-26	Pass	Completed
00046	011024	109036	10000219475	Simons	Anthony	SPD_00009_07262012	2012-07-26	Pass	Completed
00046	011036	279769	10000274770	Kindred	Stephanie	SPD_00009_07262012	2012-07-26	Pass	Completed
00061	039026	291610	10000285688	Murphy	Wesley	SPD_00009_07262012	2012-07-26	Pass	Completed
00225	113011	283252	10000278123	Bailey	Lillian	SPD_00009_07262012	2012-07-26	Pass	Completed
00261	501001	129984	10000230925	Overstreet	Sue	SPD_00009_07262012	2012-07-26	Pass	Completed
00400	195003	130586	10000231619	Morgan	Kathy	SPD_00009_07262012	2012-07-26	Pass	Completed
00400	195058	271194	10000262107	Alcaraz	Damitra	SPD_00009_07262012	2012-07-26	Pass	Completed
00400	195058	202895	10000207615	Halas	Matthew	SPD_00009_07262012	2012-07-26	Pass	Completed
00400	195070	243126	10000244900	Brown	Brittini	SPD_00009_07262012	2012-07-26	Pass	Completed
00400	195070	206889	10000203534	Maples	Sandra	SPD_00009_07262012	2012-07-26	Pass	Completed
00495	197108	109724	10000229985	Vanaman	Julie	SPD_00009_07262012	2012-07-26	Pass	Completed
00502	497042	260712	10000258980	Blankenbaker	Cathy	SPD_00009_07262012	2012-07-26	Pass	Completed
00502	497096	289912	10000284726	Norman	Myrtle	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191008	287586	10000282379	Tuggles	Jant'ae	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191177	175265	10000043281	Gary	Mary	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191177	134459	10000236283	Hughett	Randall	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191177	133567	10000235008	Teepe	Deloris	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191207	261584	10000260036	Everman	Daniel	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191208	151438	10000025525	Hall	Bruce	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191219	242195	10000243990	Mobley	Patrick	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191234	246800	10000248522	Swing	Melena	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191237	197595	10000101391	Baldwin	Cheryl	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191237	170714	10000045124	Erickson	Sharon	SPD_00009_07262012	2012-07-26	Pass	Completed
00510	191237	170710	10000045120	Steinkamp	Nancy	SPD_00009_07262012	2012-07-26	Pass	Completed
00695	141002	287313	10000282115	Jobes	Kaytlin	SPD_00009_07262012	2012-07-26	Pass	Completed
00400	195058	172014	10000045644	Hampton	Cathy	SPD_00009_07262012		Pending	Denied
00502	497053	184423	10000051038	McCullough	Glenda	SPD_00009_07262012	2012-07-26	Pending	Not Completed

Has Not Been Enrolled in Training

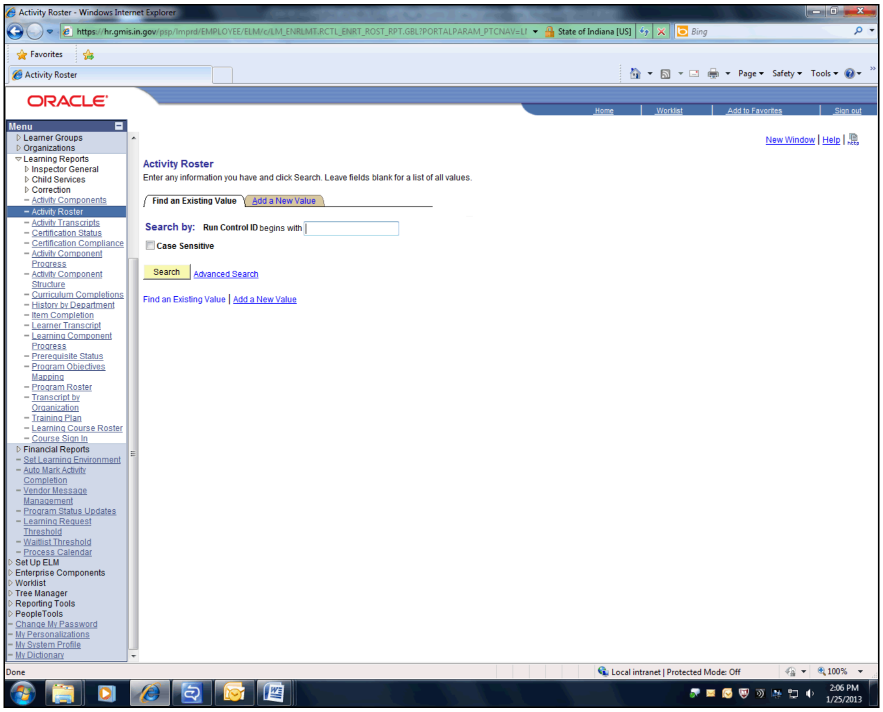
Employee ID	Last Name	First Name
10000105383	Abair	Melissa
10000233901	Abbasi	Danish
10000013444	Abbasi	Fike
10000027829	Abbett	John
10000227359	Abbott	Brian
10000272267	Abbott	Crystal
10000258591	Abbott	Heather
10000284384	Abbott	Ima
10000007674	Abbott	Jennifer
10000277525	Abbott	Joseph
10000100349	Abbott	Karl
10000289297	Abbott	Katrina

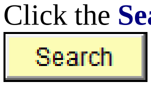
Step	Action
18.	Review the PDF file and when finished click the **X** button to close the document.
19.	**End of Procedure.**

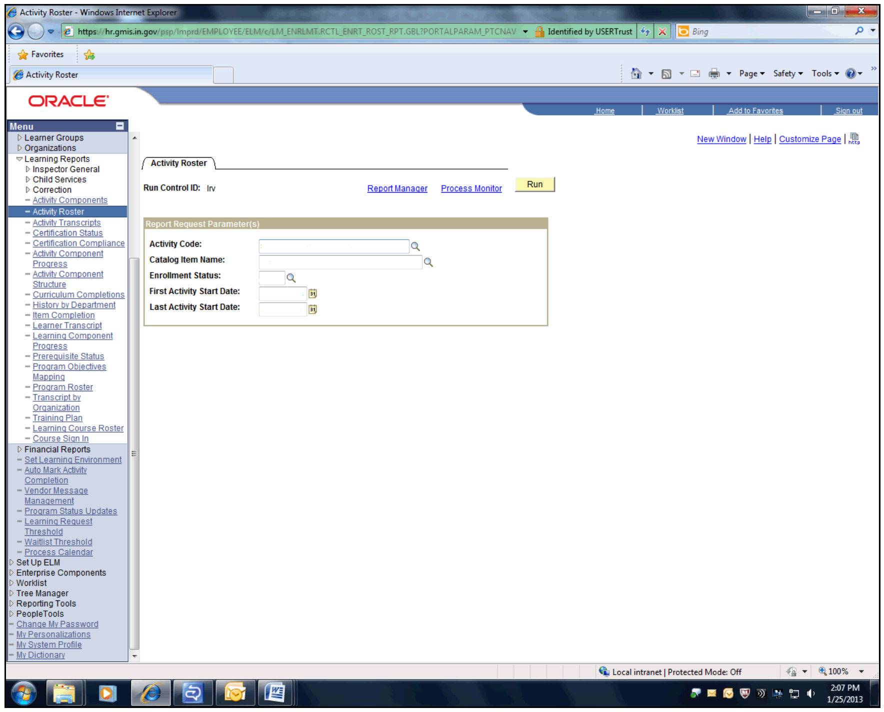
How to Run a Activity Roster Report



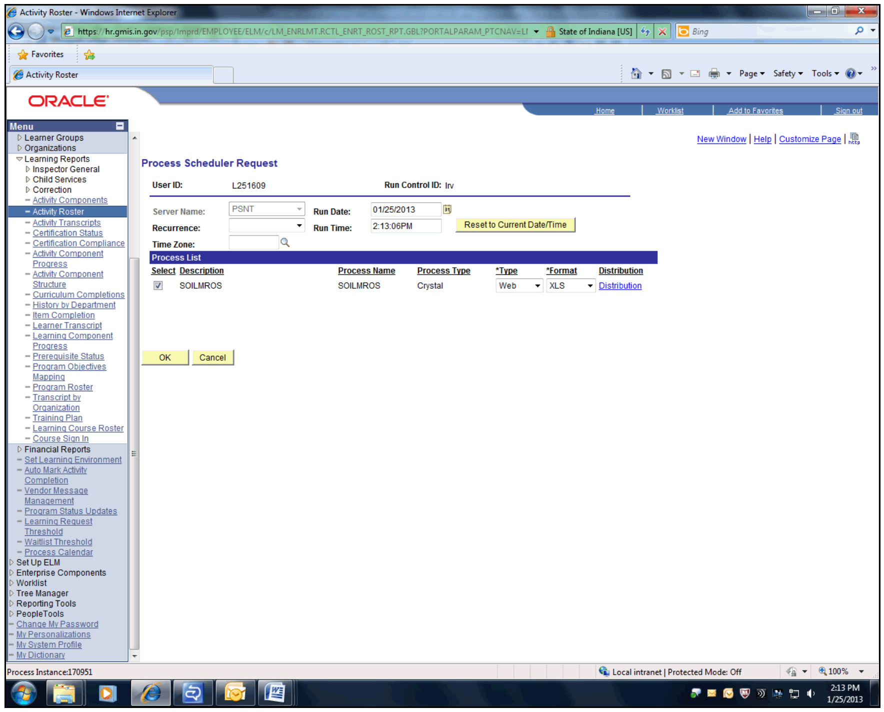
Step	Action
1.	Click the **Learning Reports** link. Learning Reports
2.	Click the **Activity Roster** link. Activity Roster

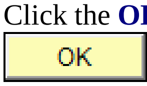


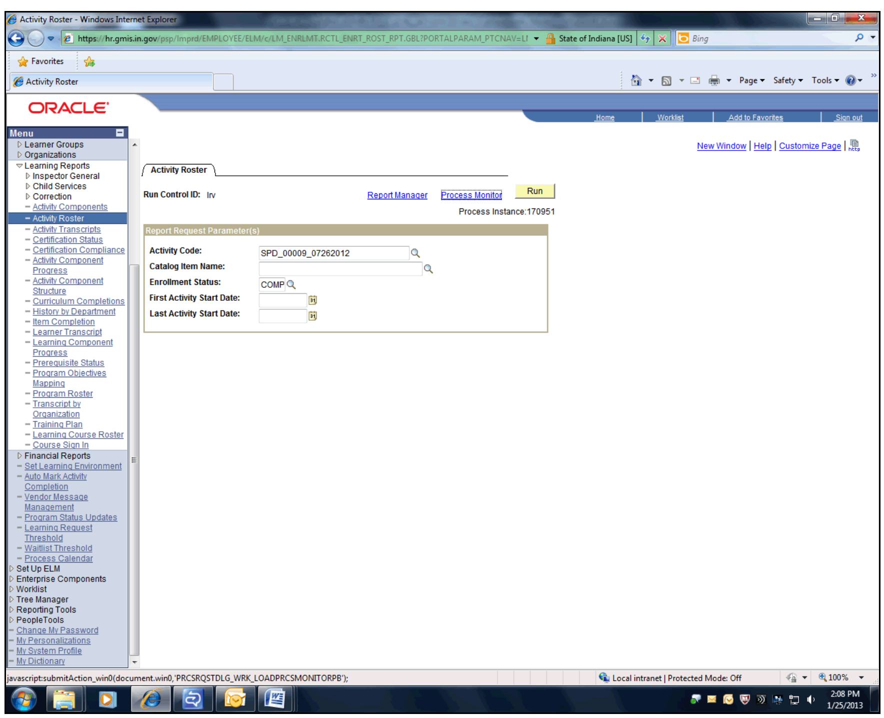
Step	Action
3.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab. Click the **Search** button. 



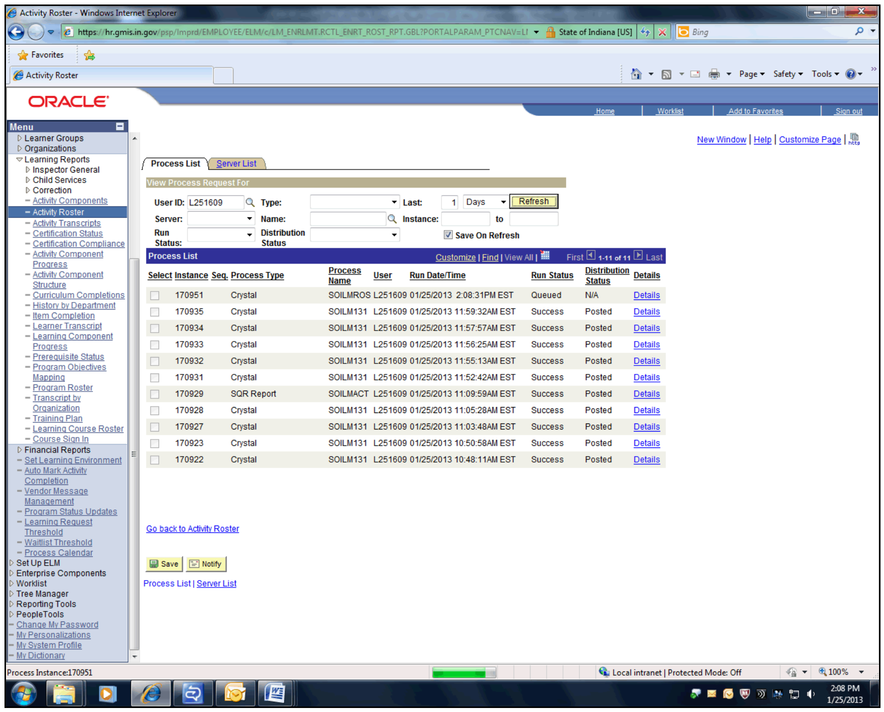
Step	Action
4.	Select the **Report Request Parameter(s)** needed to run the report. You may select an **Activity Code** or **Catalog Item** to begin this search. You can then choose to filter the information by the enrollment status (i.e. completed, pending, not completed) and/or date to determine results desired. Click in the **Activity Code** field.
5.	Click the **Look up Activity ID (Alt+5)** button.
6.	You can search for the **Activity Cod**e or type the code into the **begins with** field. Click the **Activity Code** link. SPD_00009_07262012
7.	Click the **Look up Enrollment Status (Alt+5)** button.
8.	Click the **Completed** link or select the value that you want to search by. Completed
9.	Click the **Run** button. Run



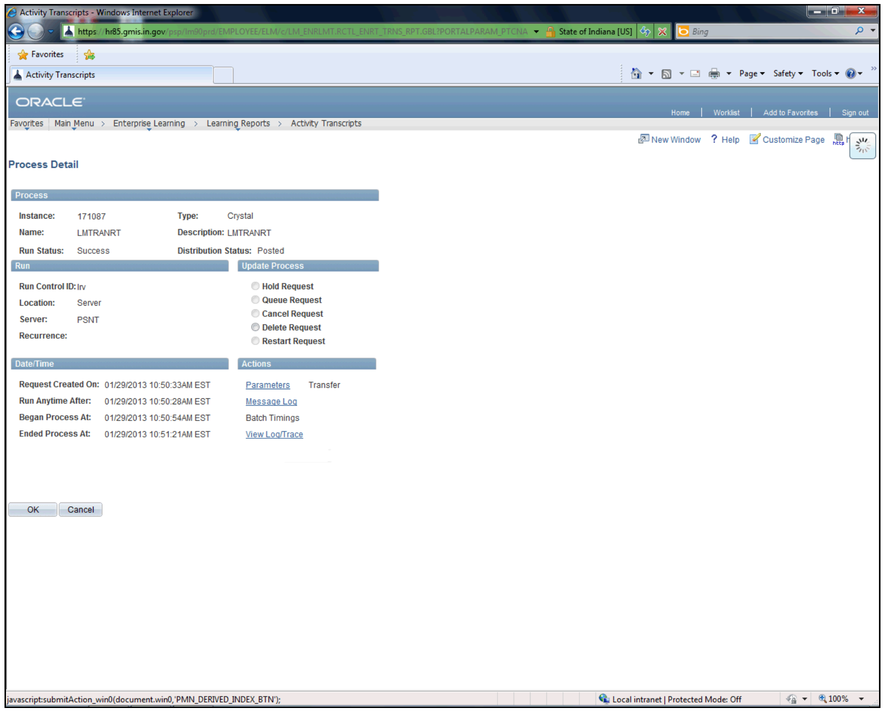
Step	Action
10.	Click the **OK** button. 



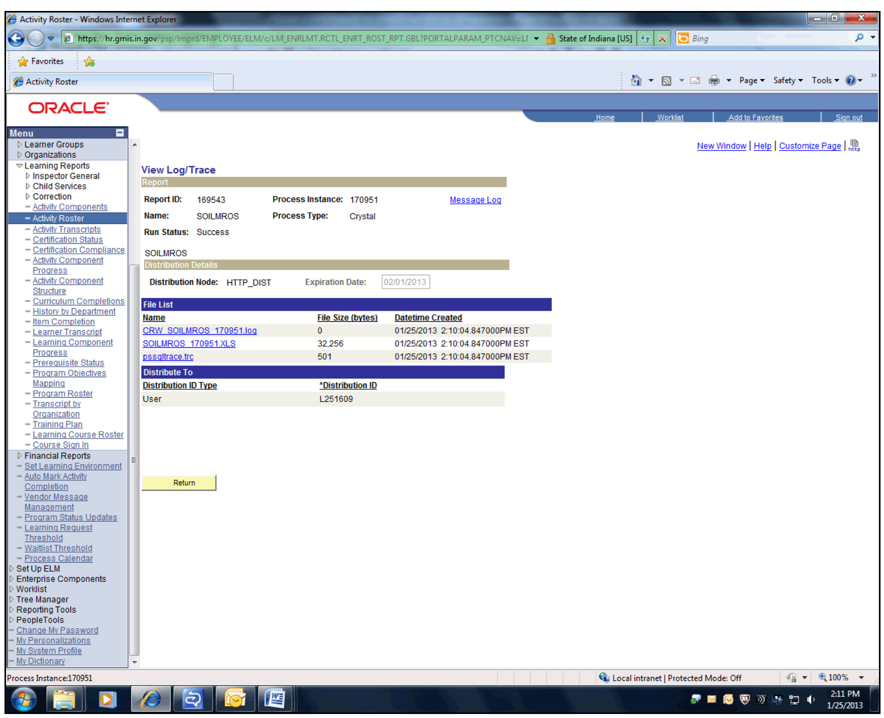
Step	Action
11.	Click the **Process Monitor** link. Process Monitor



Step	Action
12.	Click the Refresh button until the **Run Status** column status is Success and the **Distribution Status** column status is Posted. Click the **Refresh** button. Refresh
13.	Click the **Details** link. Details

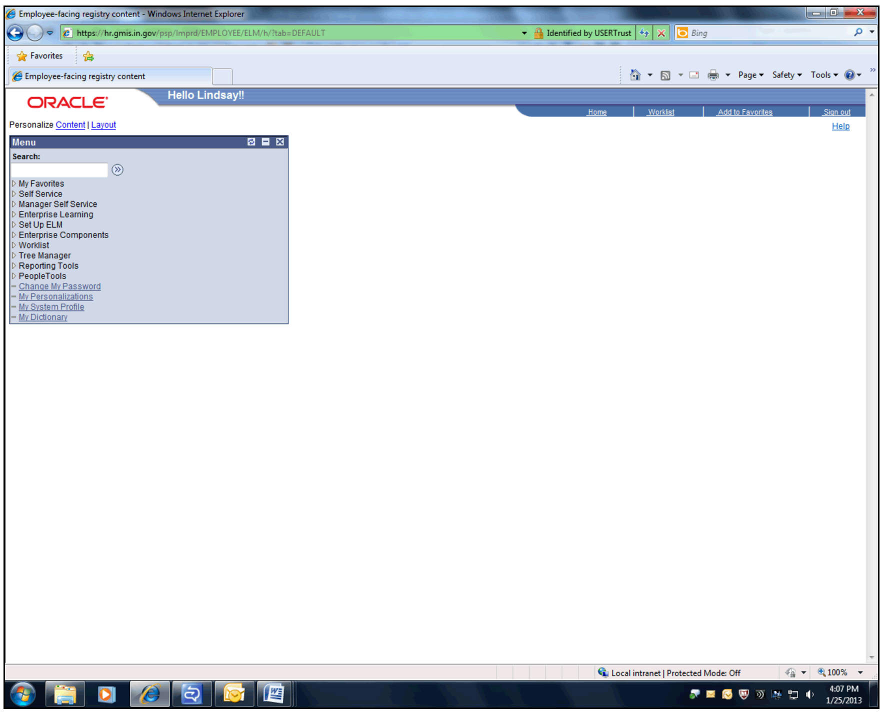


Step	Action
14.	Click the **View Log/Trace** link. View Log/Trace

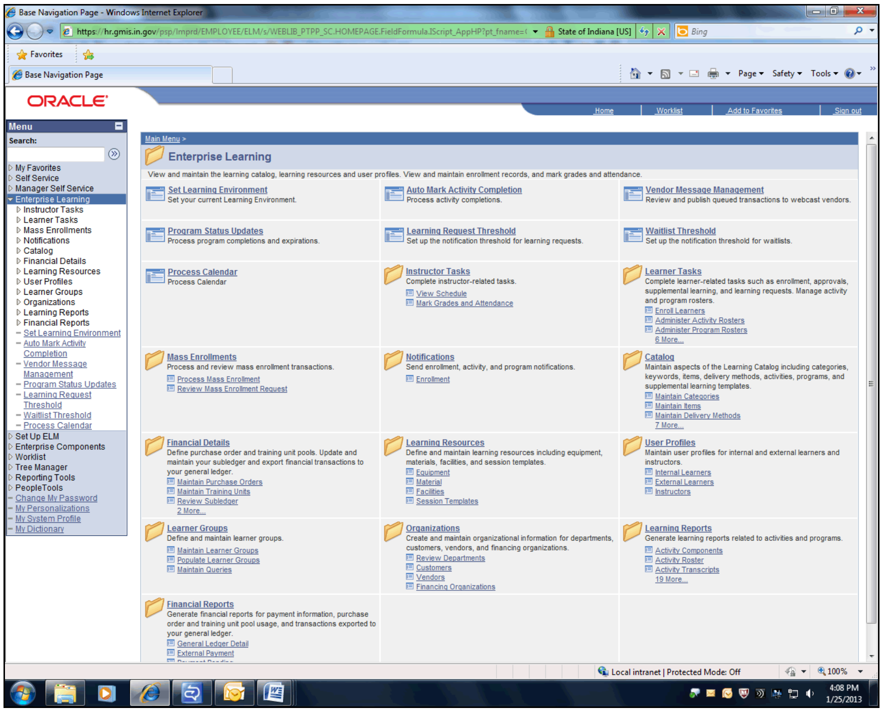


Step	Action
15.	Click the **XLS file** link and review the Activity Roster. SOILMROS_170951.XLS
16.	**End of Procedure.**

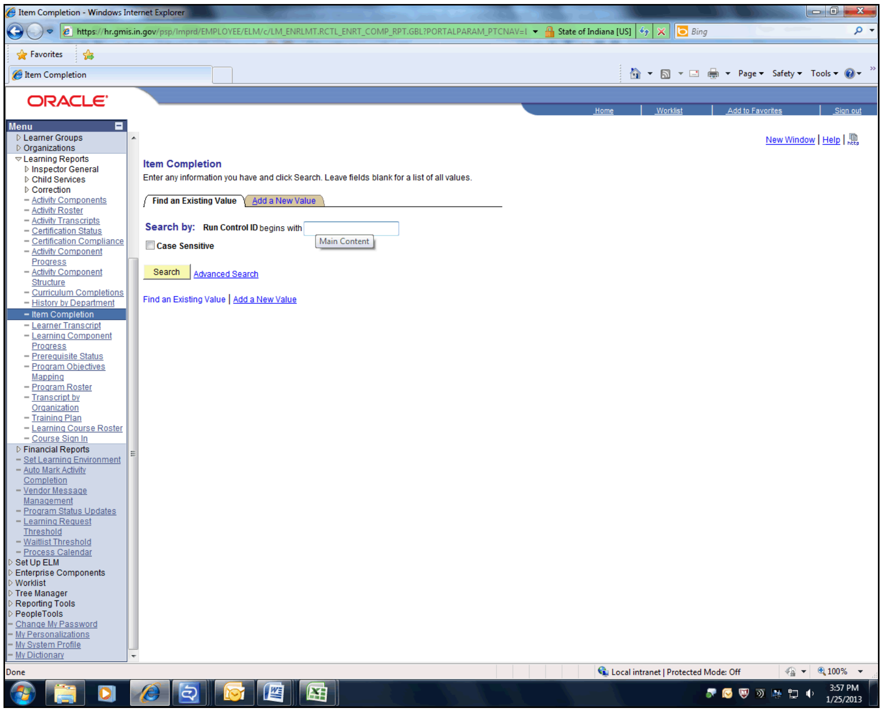
How to Process a Item Completion Report

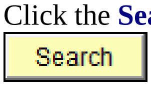


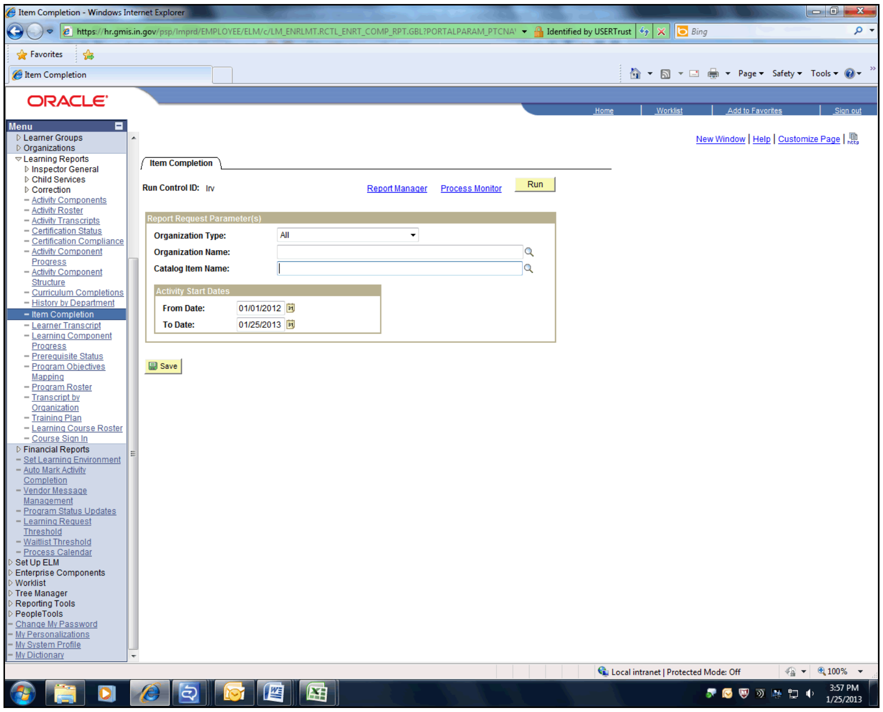
Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning

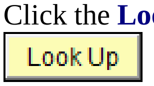
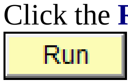


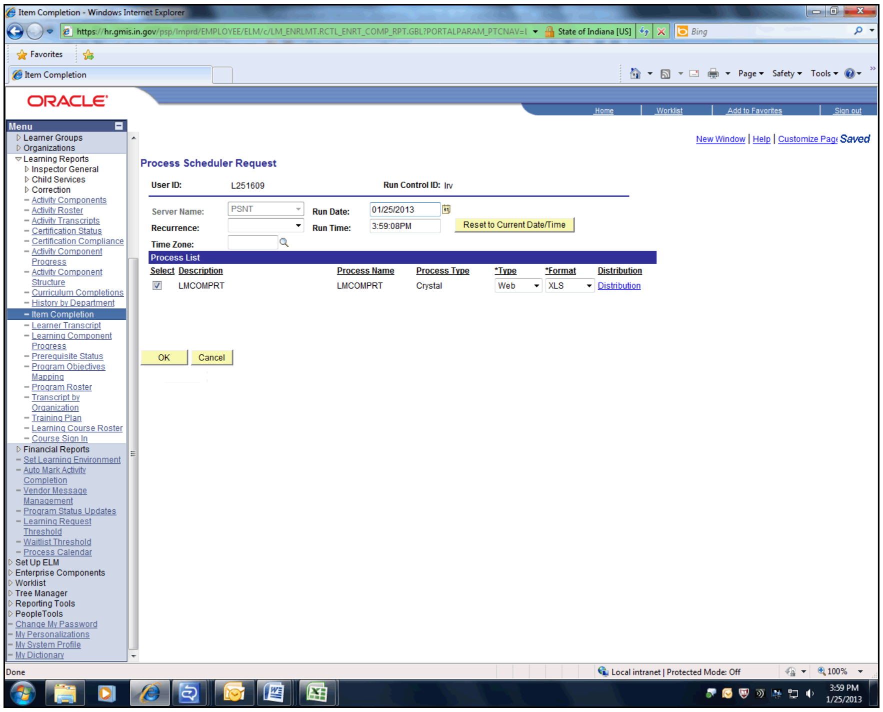
Step	Action
2.	Click the **Learning Reports** link. Learning Reports
3.	Click the **Item Completion** link. Item Completion



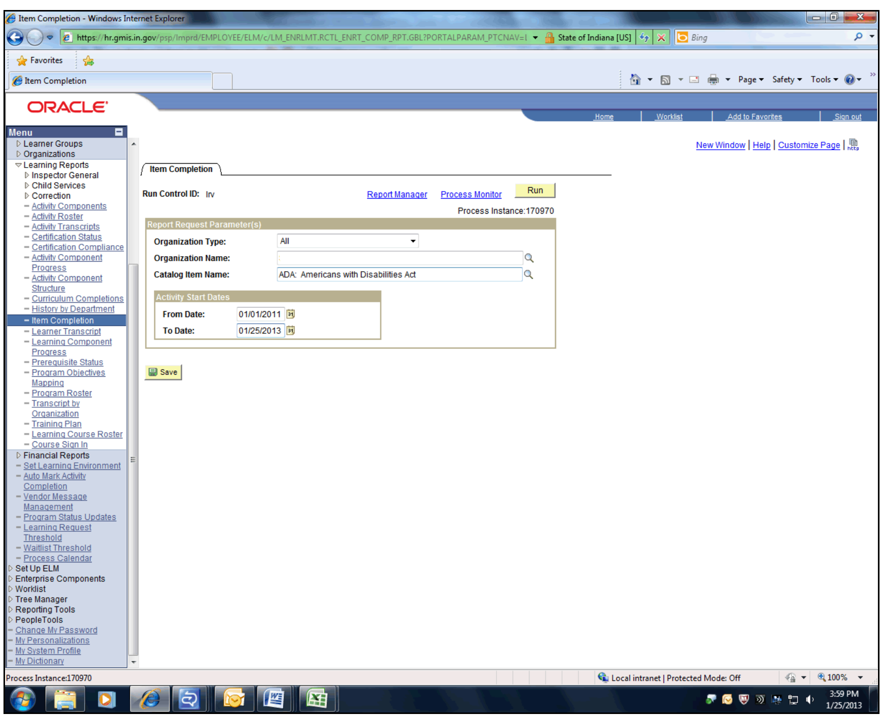
Step	Action
4.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab. Click the **Search** button. 



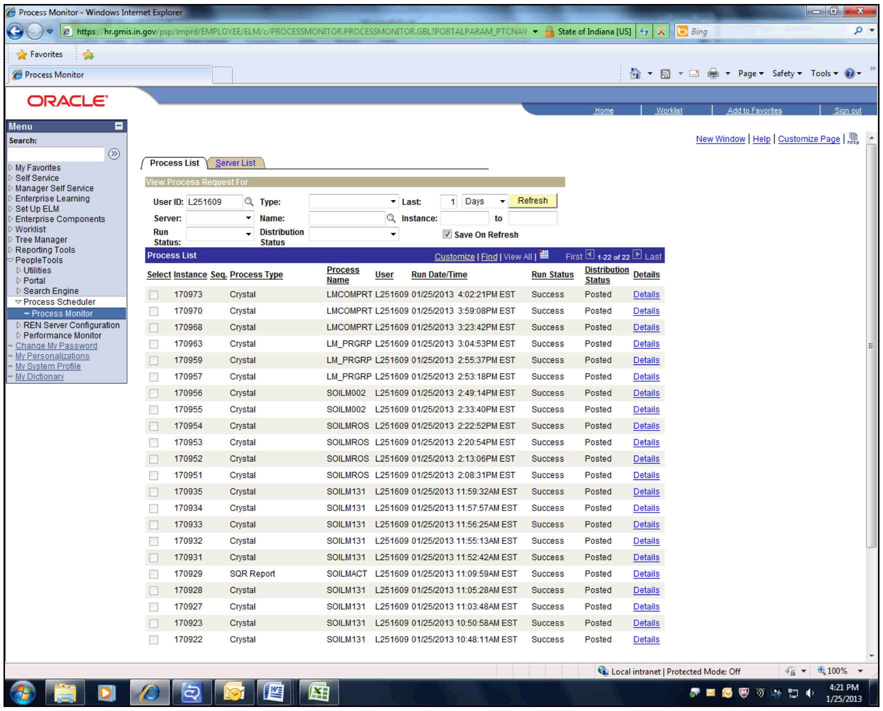
Step	Action
5.	Select the **Report Request Parameter(s)** needed to run the report. **NOTE:** For this report to run properly you must select Organization Type as **ALL** and then search by Catalog Item Name. Click the **Look up Catalog Item Name (Alt+5)** button. 
6.	You can type in the name of the course or search and sort alphabetically. Click the **Look Up** button. 
7.	Click the **Course Long Name** link. 
8.	Click the **Calendar** button and select the **From Date**. 
9.	Click the **Calendar** button and select the **To Date**. 
10.	Click the **Run** button. 



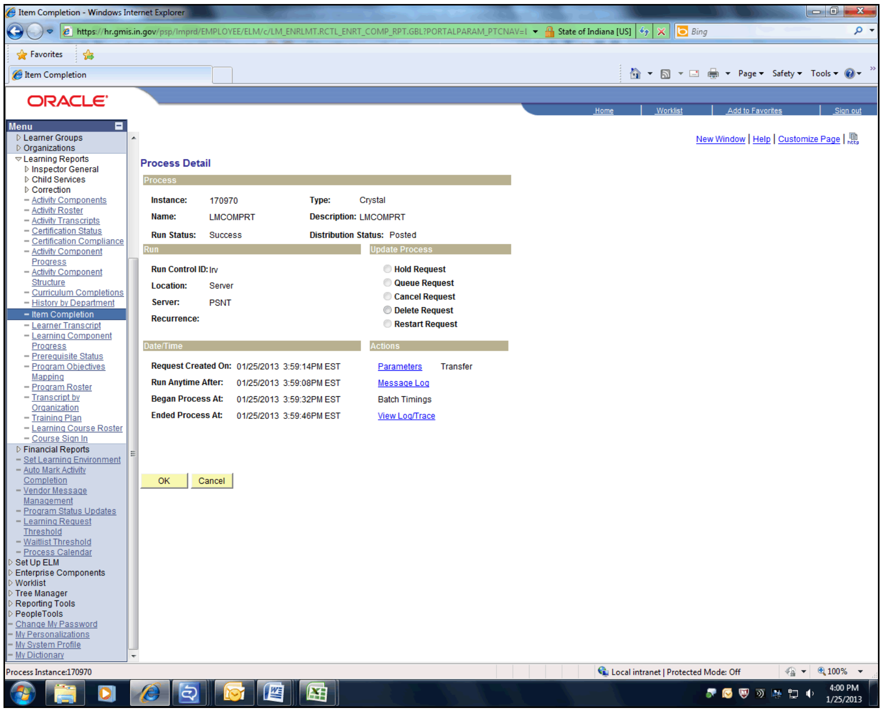
Step	Action
11.	Click the **OK** button. OK



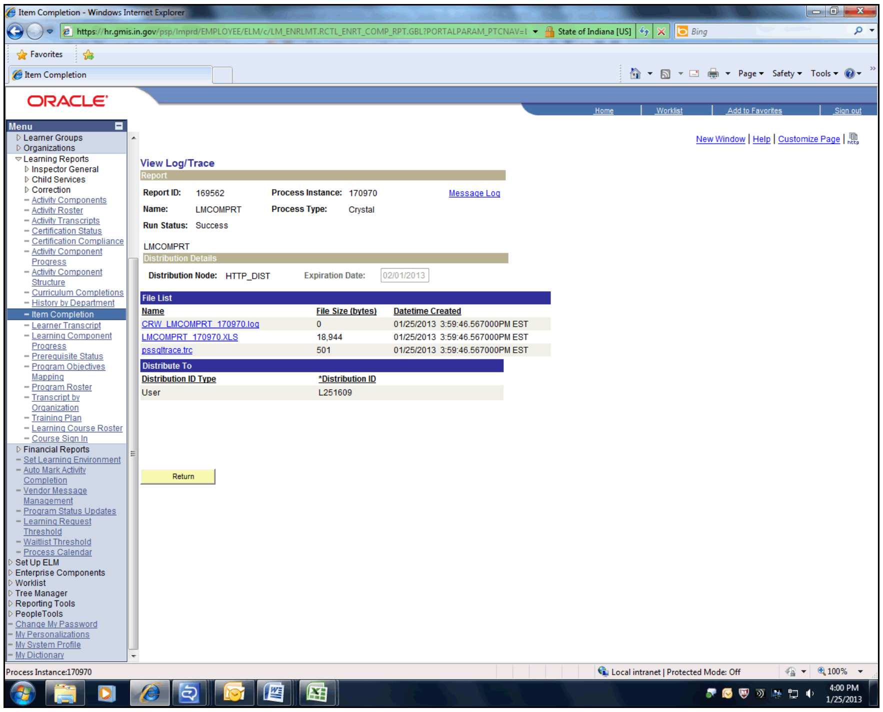
Step	Action
12.	Click the Refresh button until the **Run Status** column status is Success and the **Distribution Status** column status is Posted. Click the **Process Monitor** link. Process Monitor



Step	Action
13.	Click the **Details** link. Details



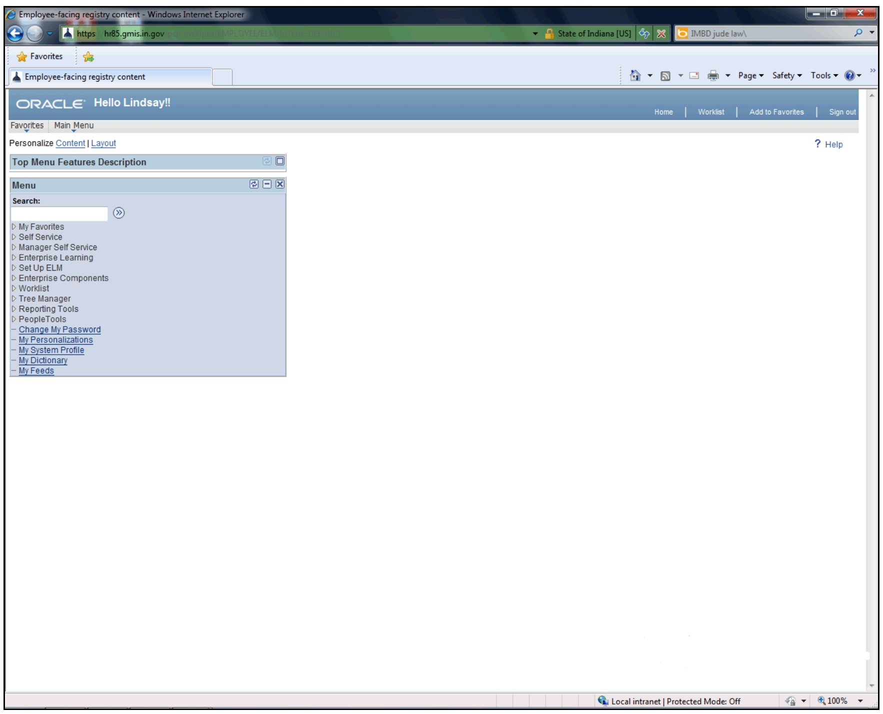
Step	Action
14.	Click the **View Log/Trace** link. View Log/Trace



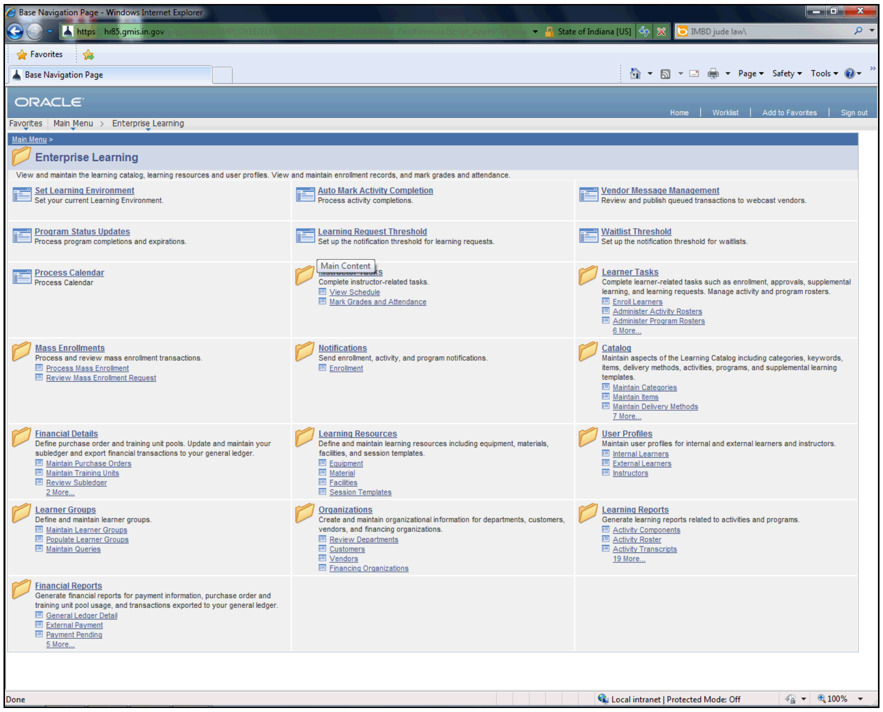
Step	Action
15.	Click the **XLS** link to review the item completion report. LMCOMPRT_170970.XLS
16.	**End of Procedure.**

How to Process a Activity Components Report

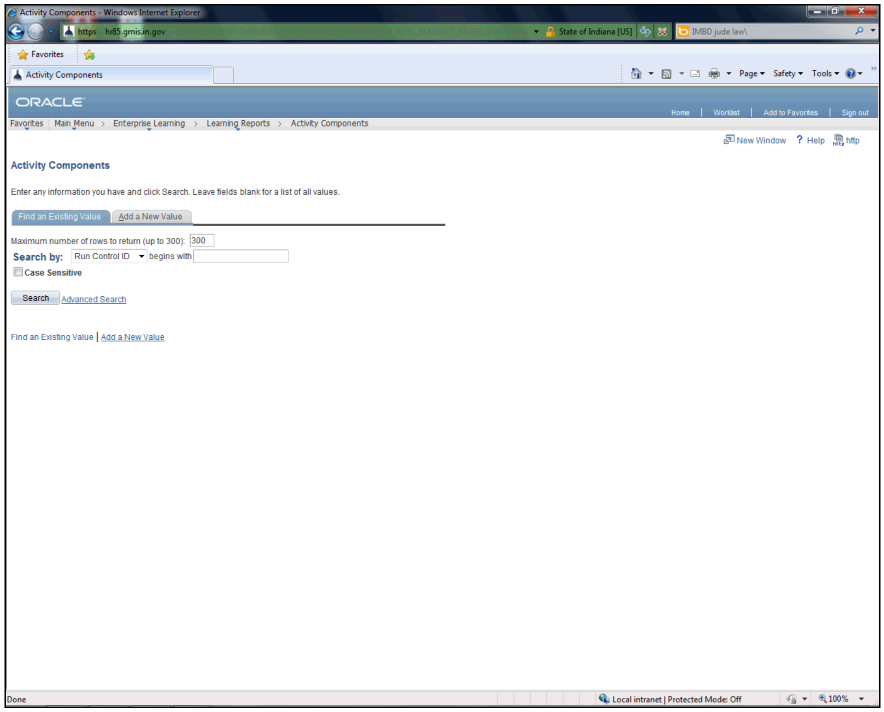
The Activity Component report allows for an administrator to review the components associated within an activity, a catalog item, or an entire Category. The report parameters allow you to narrow down the scope of your search to include to and from dates.

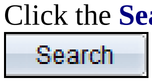


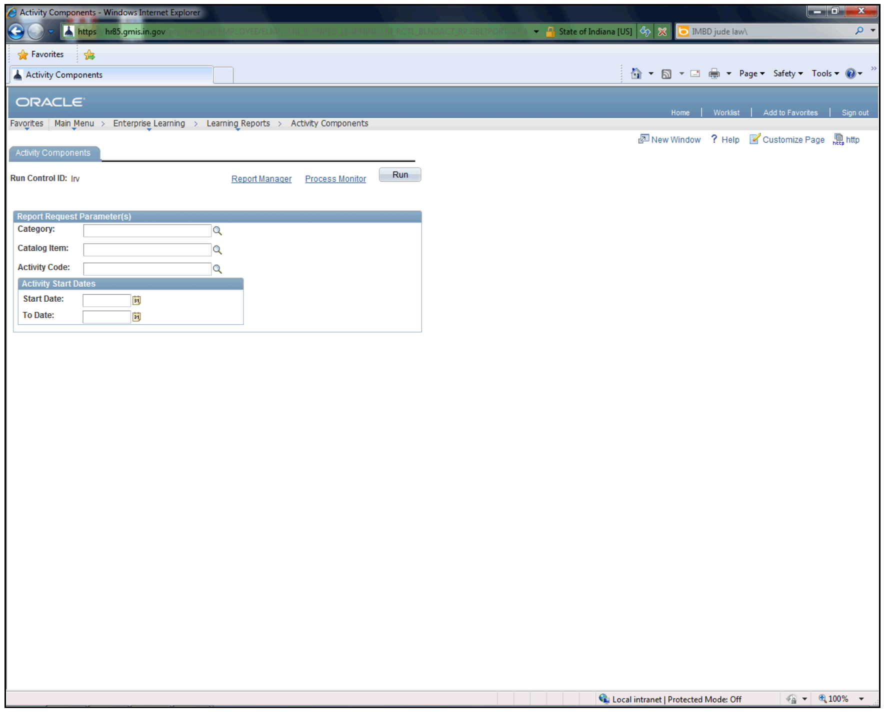
Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning



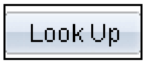
Step	Action
2.	Click the **Learning Reports** link. Learning Reports
3.	Click the **Activity Components** link. Activity Components

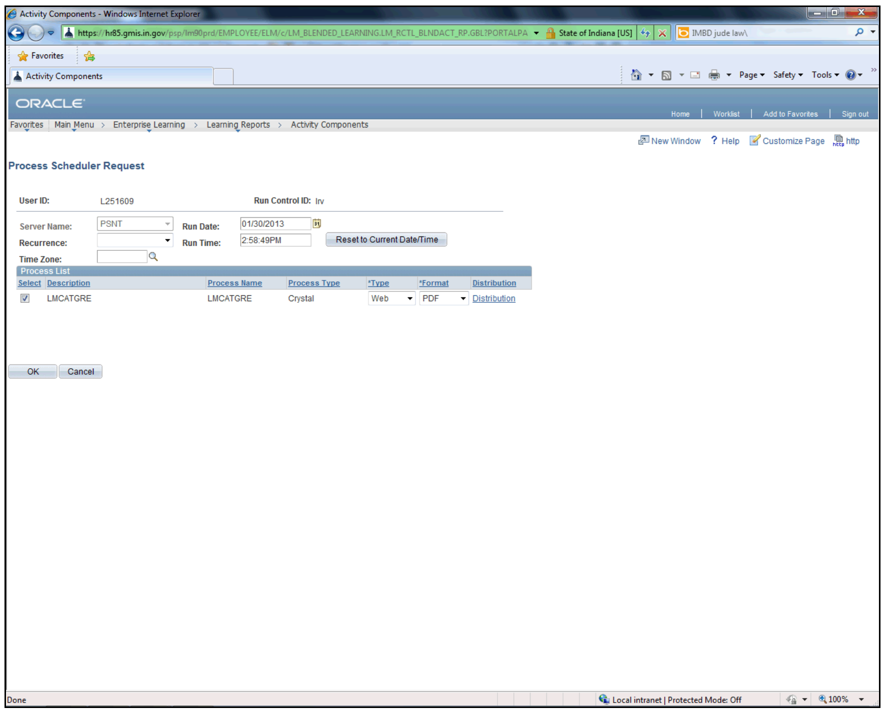


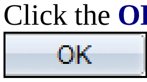
Step	Action
4.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab. Click the **Search** button. 

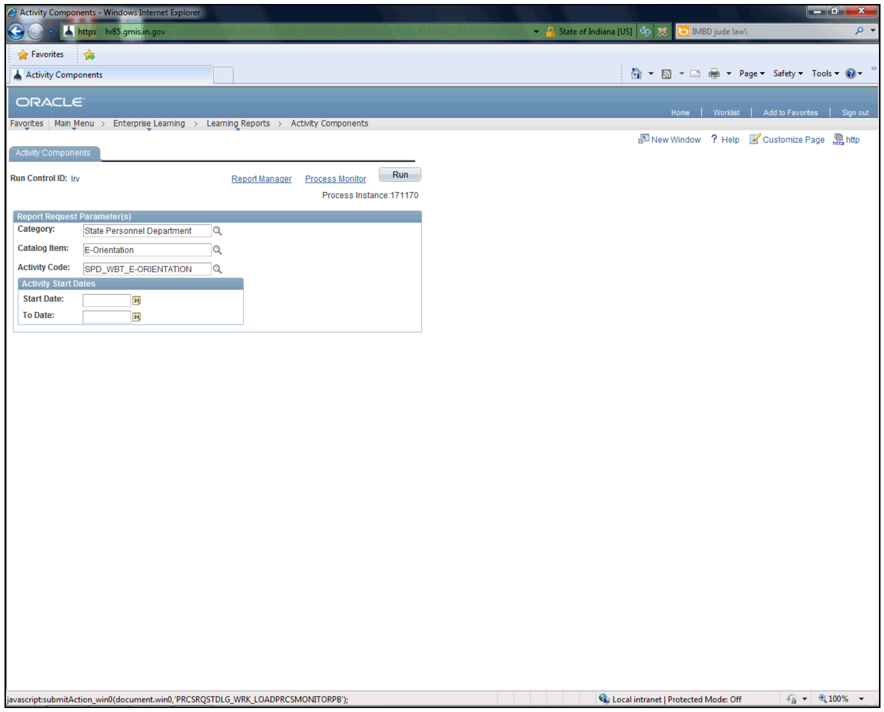


Step	Action
5.	Select the **Report Request Parameter(s)** needed to run the report. You may select a **Category, Catalog Item or Activity Code** or all of the above to begin this search. (Optional: You can choose to filter the information by date to determine results desired). Select the desired item(s) in the **Report Request Parameter(s)** box.
6.	Click the **Look up Category (Alt+5)** button. 
7.	You can search for the **Category Long Name** in the **begins with** field. Click the **Look Up** button. 
8.	Click the **Look up Catalog Item (Alt+5)** button. 
9.	You can search for the **Category Item** in the **begins with** field. Click the **Look Up** button. 
10.	Click the **Look up Activity Code (Alt+5)** button. 

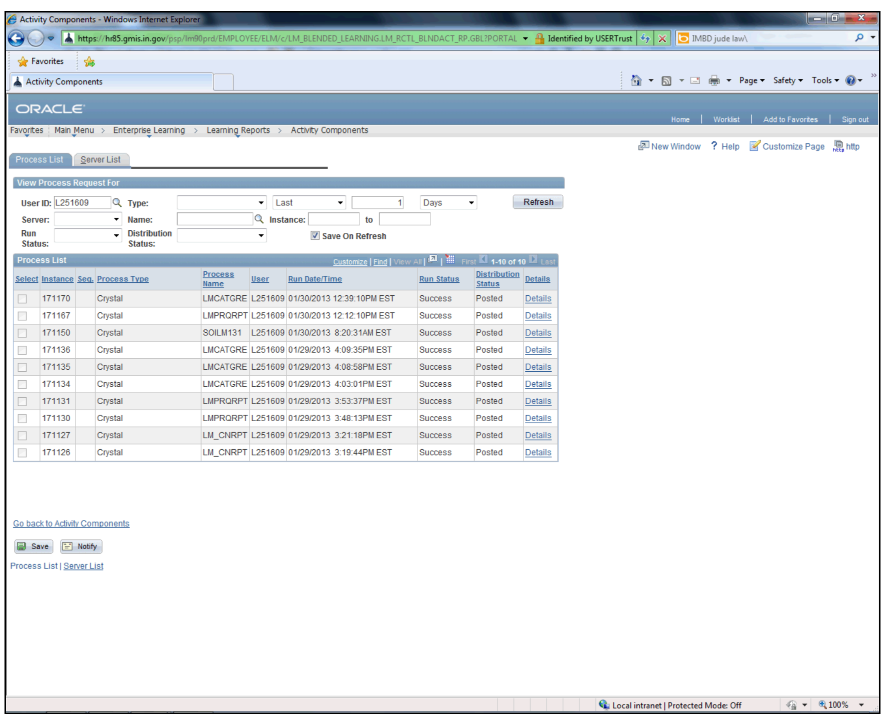
Step	Action
11.	You can search for the **Activity Code** in the **begins with** field. Click the **Look Up** button. 
12.	Click the **Run** button. 



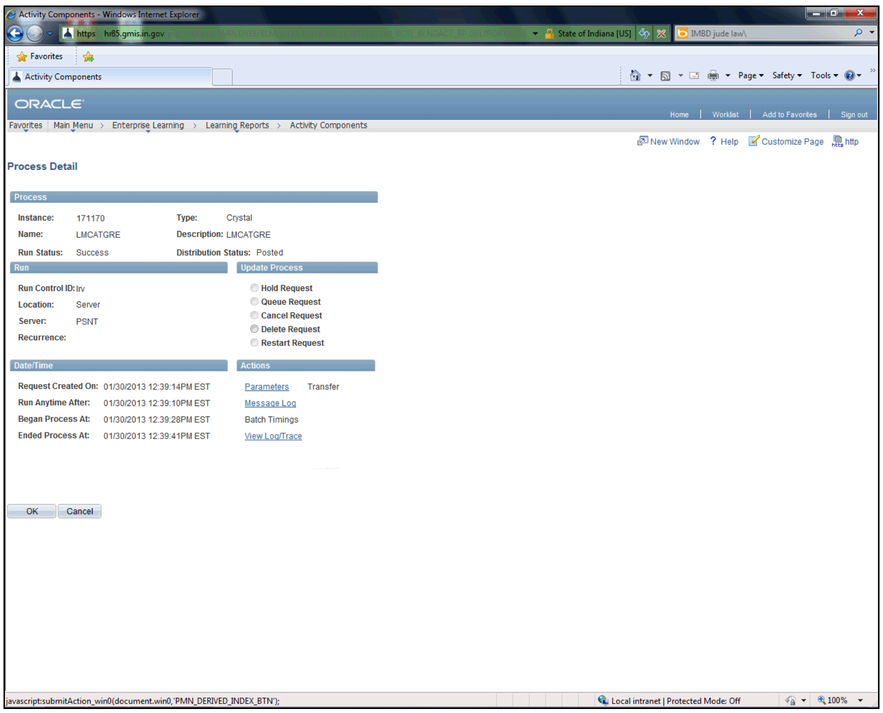
Step	Action
13.	Click the **OK** button. 



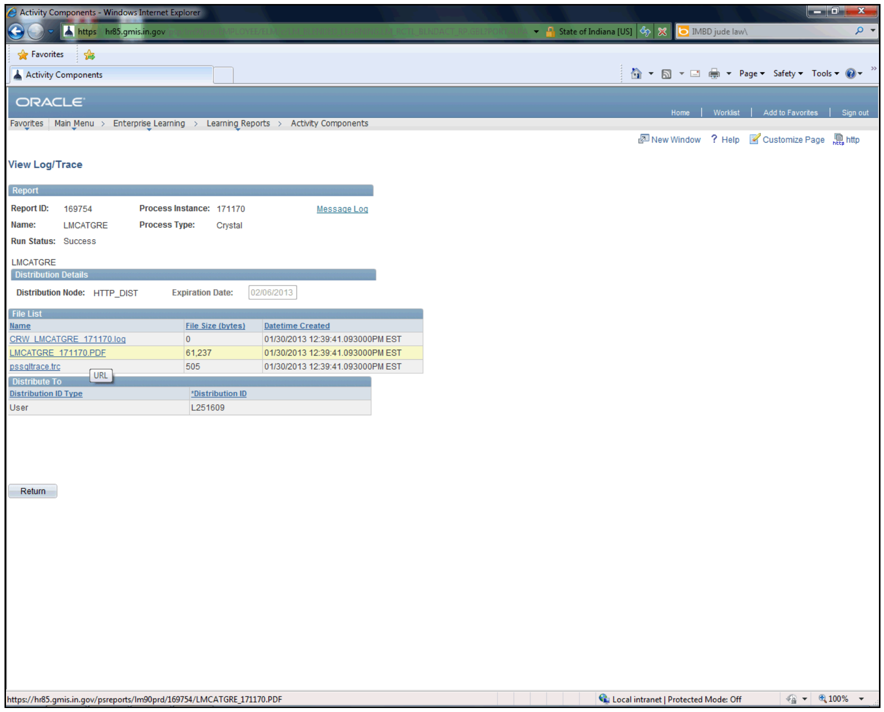
Step	Action
14.	Click the **Process Monitor** link. Process Monitor



Step	Action
15.	Click the Refresh button until the **Run Status** column status is Success and the **Distribution Status** column status is Posted. Click the **Refresh** button. Refresh
16.	Click the **Details** link. Details



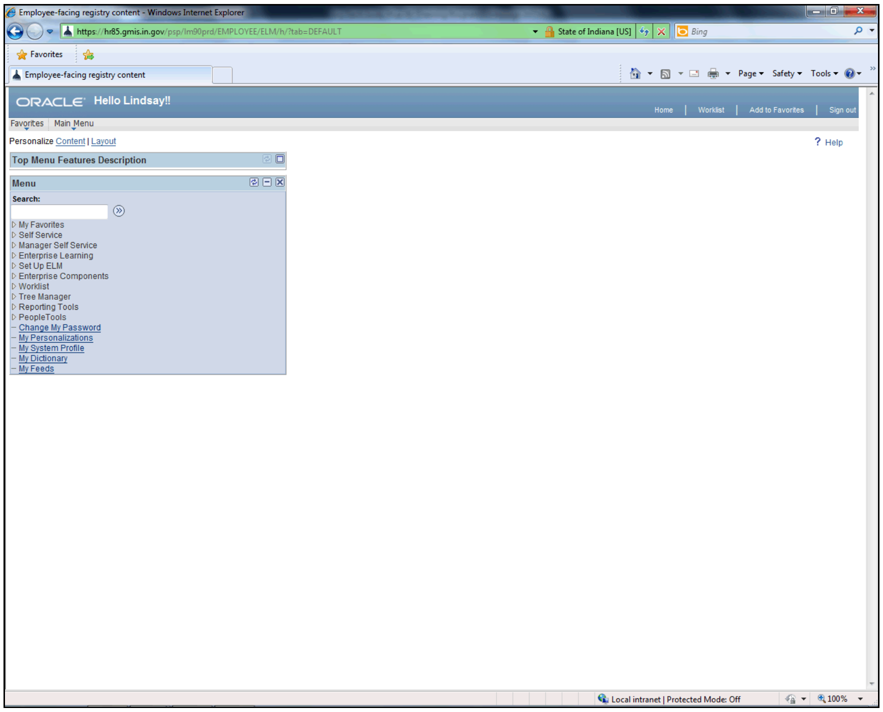
Step	Action
17.	Click the **View Log/Trace** link. View Log/Trace

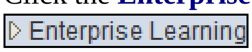


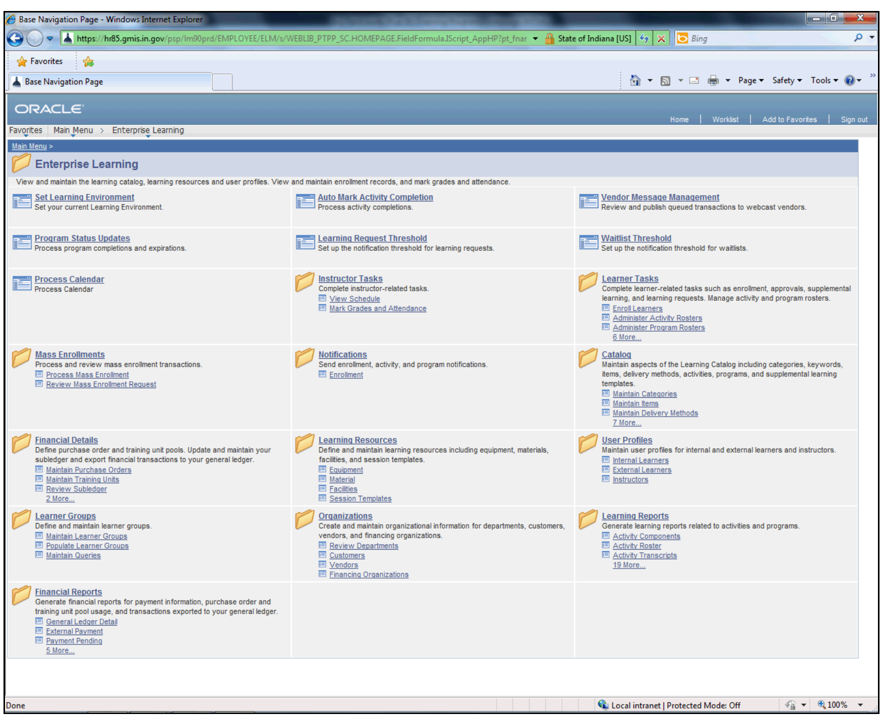
Step	Action
18.	Click the **PDF** link to review the Activity Component report. LMCATGRE_171170.PDF
19.	**End of Procedure.**

How to Process a Activity Component Progress Report

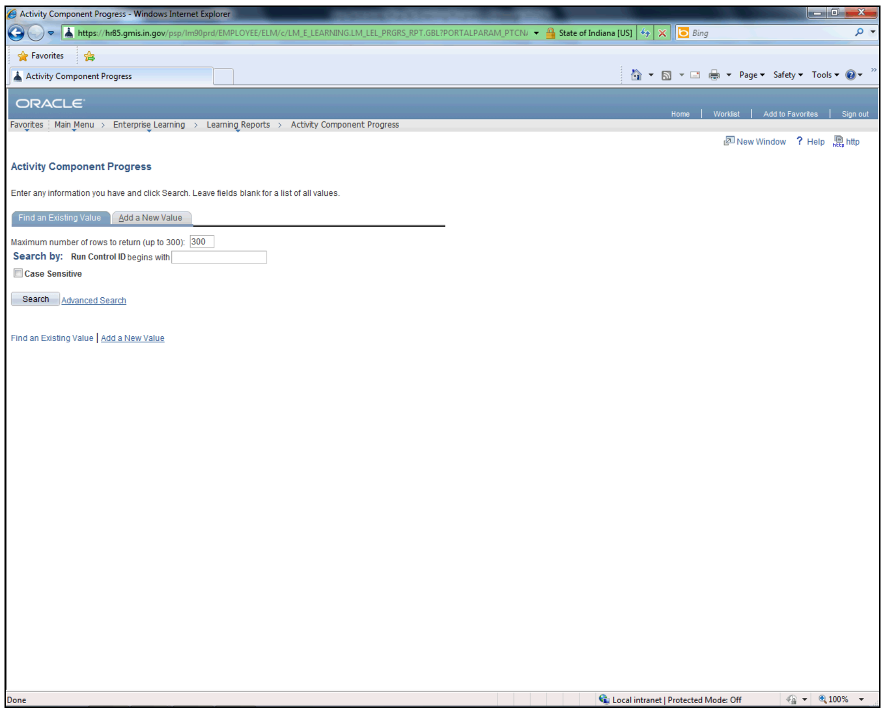
The Activity Component Progress report allows you to review component progress and completion at the activity level. You can view the lesson title, score (if recorded in LMS), and status of the component (either Completed or Not Completed).



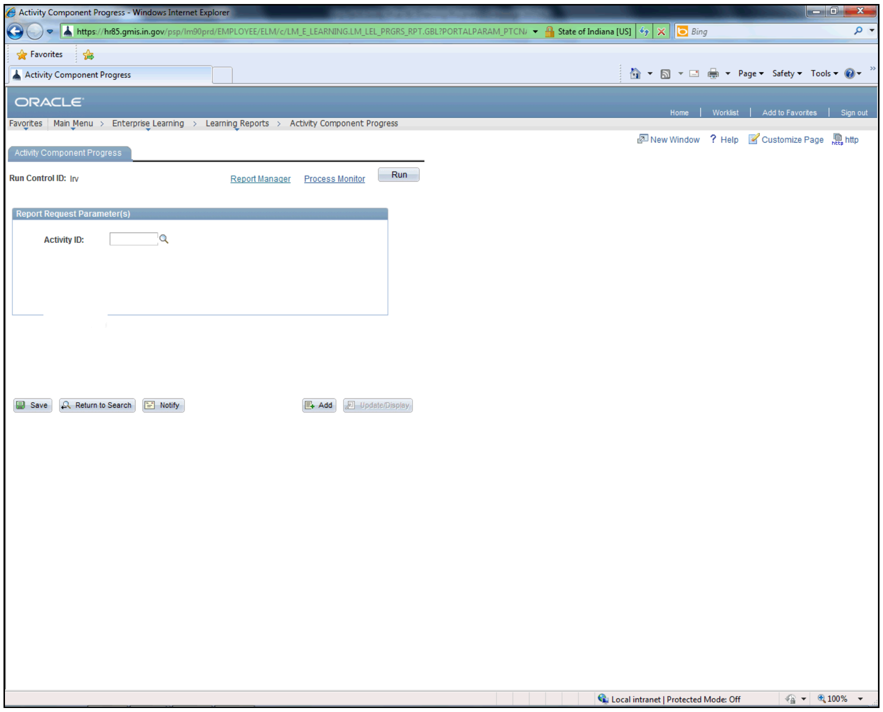
Step	Action
1.	Click the **Enterprise Learning** link. 

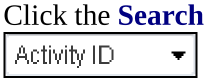


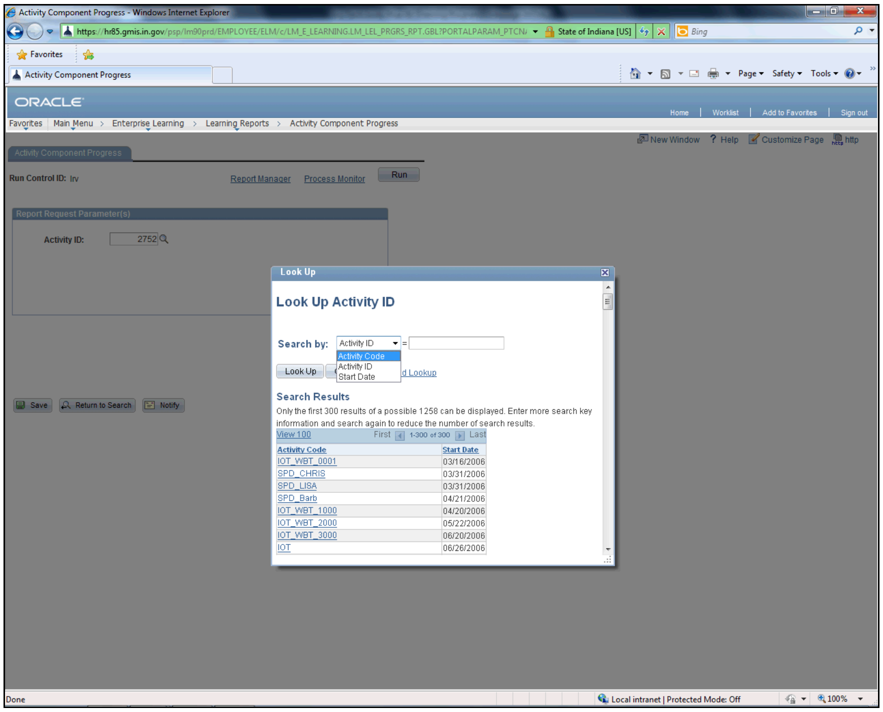
Step	Action
2.	Click the **Learning Reports** link. Learning Reports
3.	Click the **Activity Component Progress** link. Activity Component Progress



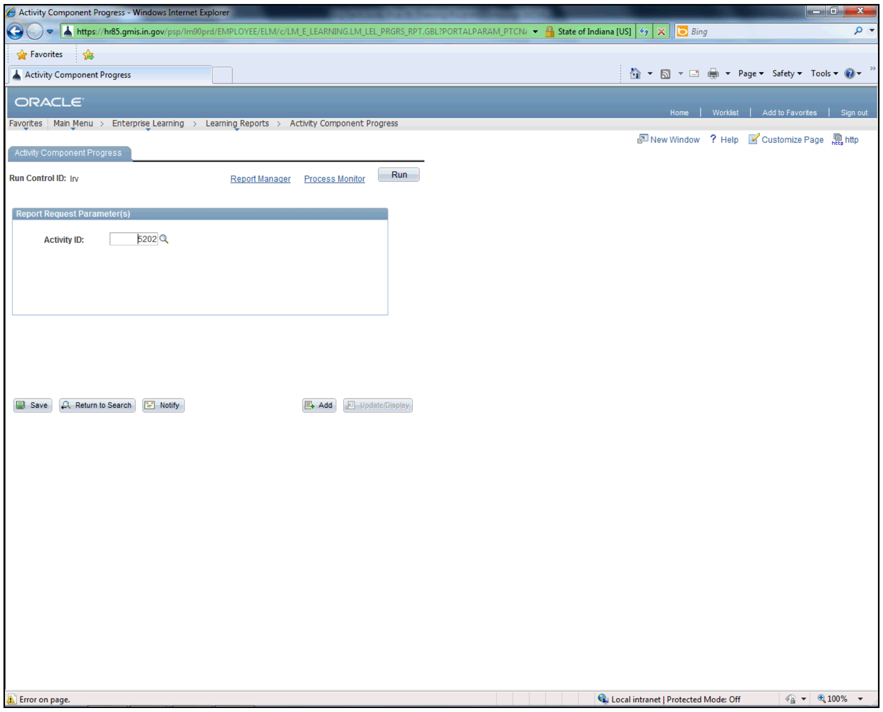
Step	Action
4.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab. Click the **Search** button. Search



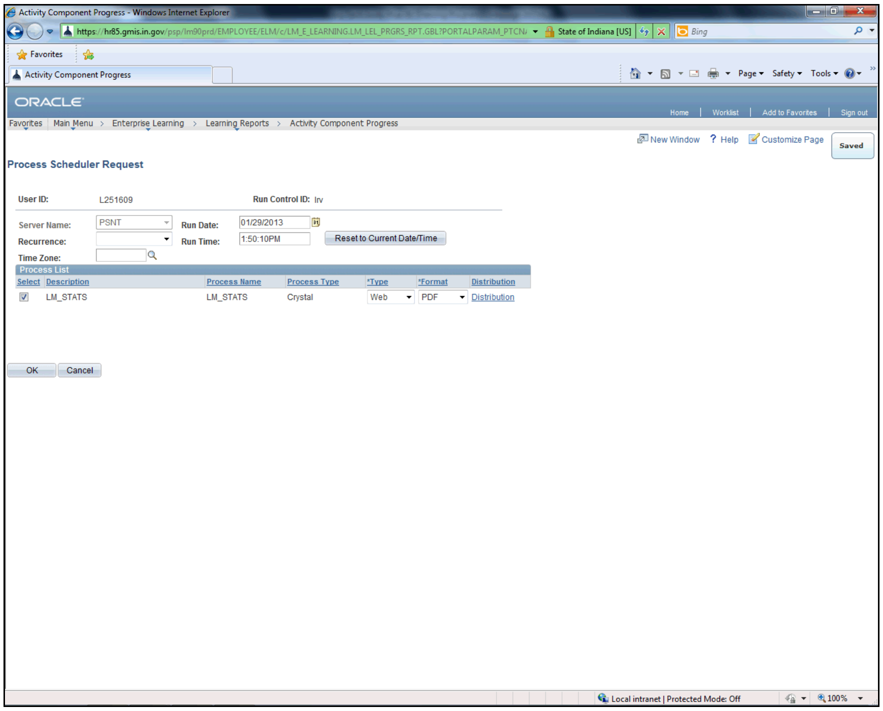
Step	Action
5.	Click the **Look up Activity ID (Alt+5)** button. 
6.	Click the **Search by** list. 



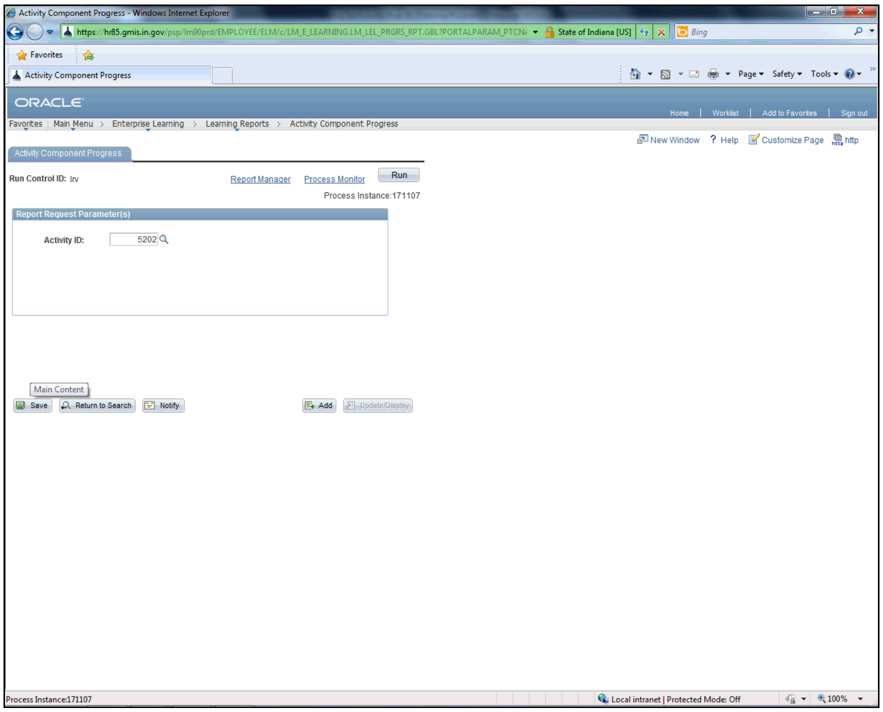
Step	Action
7.	Click the **Activity Code** list item. Activity Code
8.	Enter the Activity Code and click the **Look Up** button. **NOTE:** If you don't know the Activity Code you can use the Advanced Look Up feature. Click the **Look Up** button. Look Up
9.	Click the **Activity Code** link that matches the naming convention for the course. SPD_00009_04262012

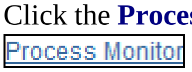


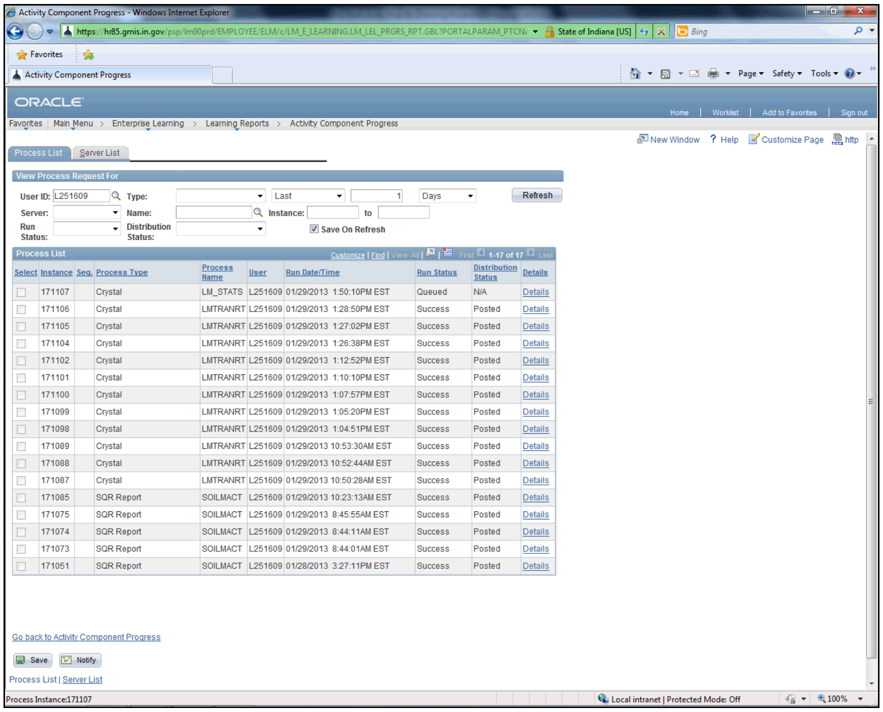
Step	Action
10.	Click the **Run** button. 



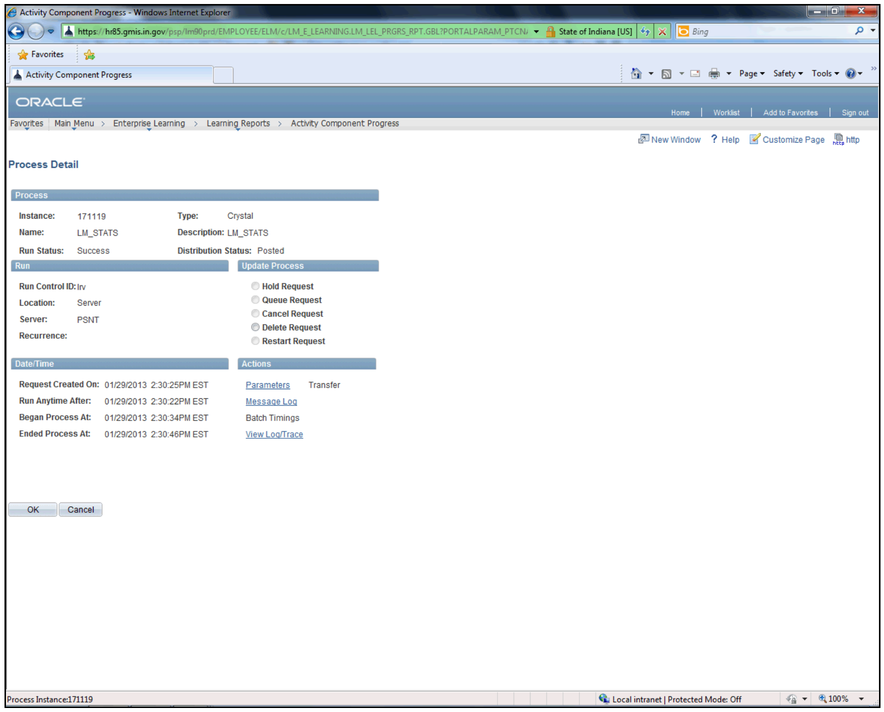
Step	Action
11.	Click the **OK** button. 



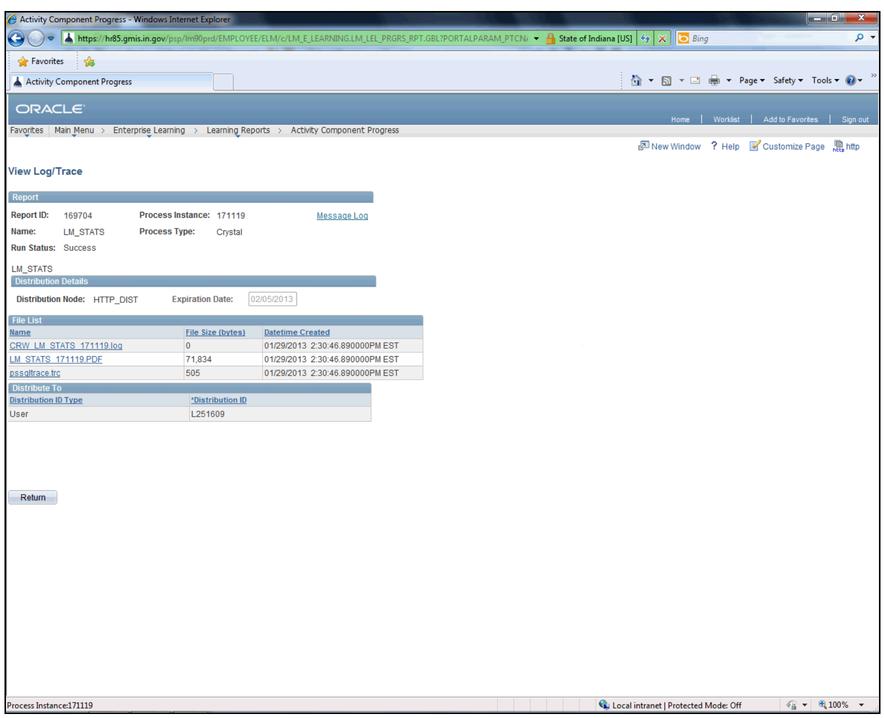
Step	Action
12.	Click the **Process Monitor** link. 



Step	Action
13.	Click the Refresh button until the **Run Status** column status is Success and the **Distribution Status** column status is Posted. Click the **Refresh** button. Refresh
14.	Click the **Details** link. Details



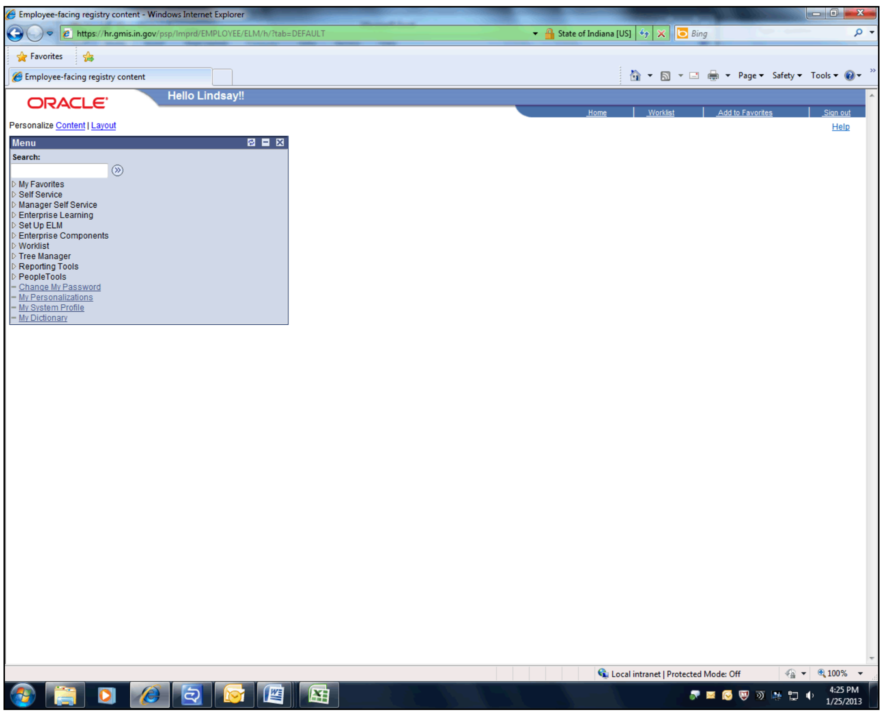
Step	Action
15.	Click the **View Log/Trace** link. View Log/Trace



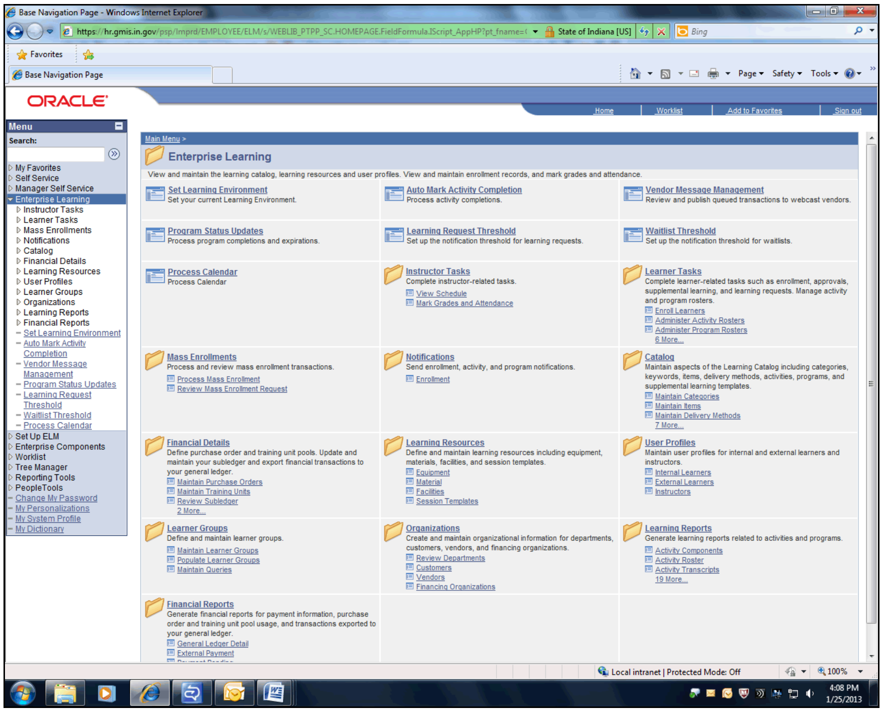
Step	Action
16.	Click the **PDF** link to review the Activity Component Progress report. LM_STATS_171119.PDF
17.	**End of Procedure.**

How to Process a Learning Component Progress Report

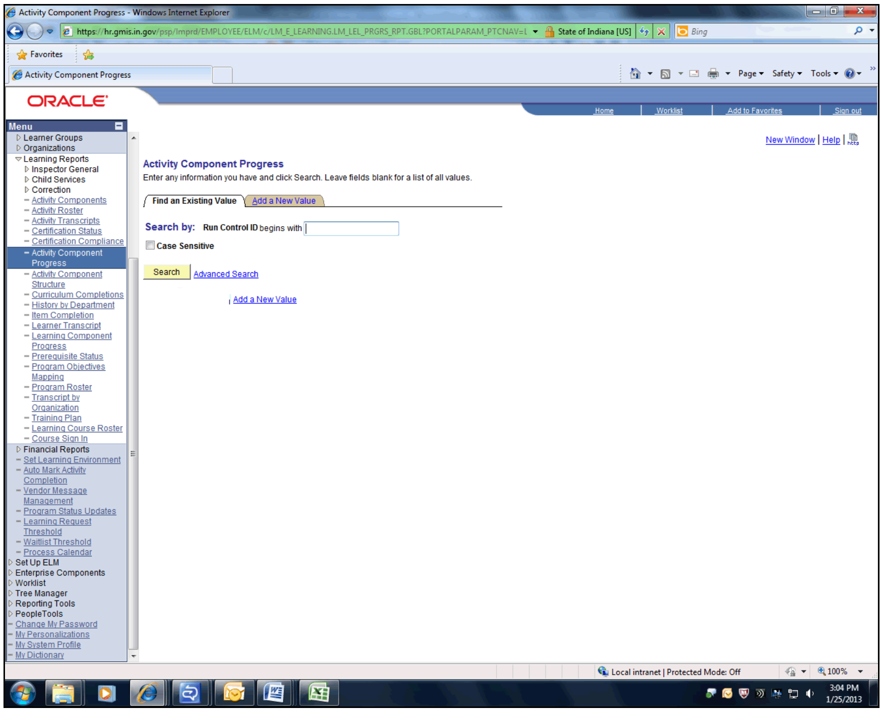
The Learning Component Progress report allows you to review activities and their learning components associated with a single catalog item or all catalog items within a category.

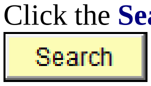


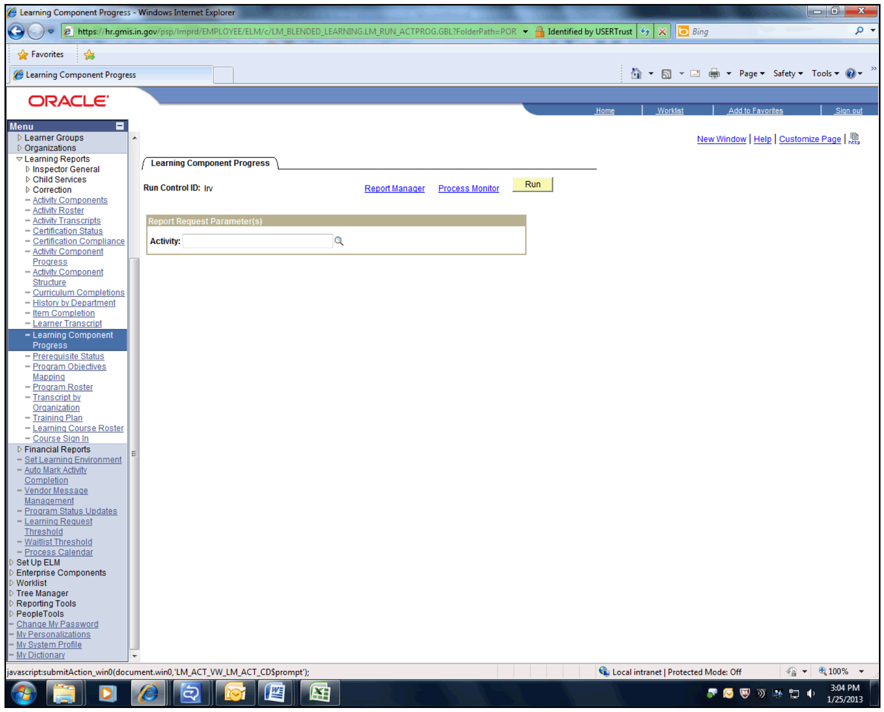
Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning



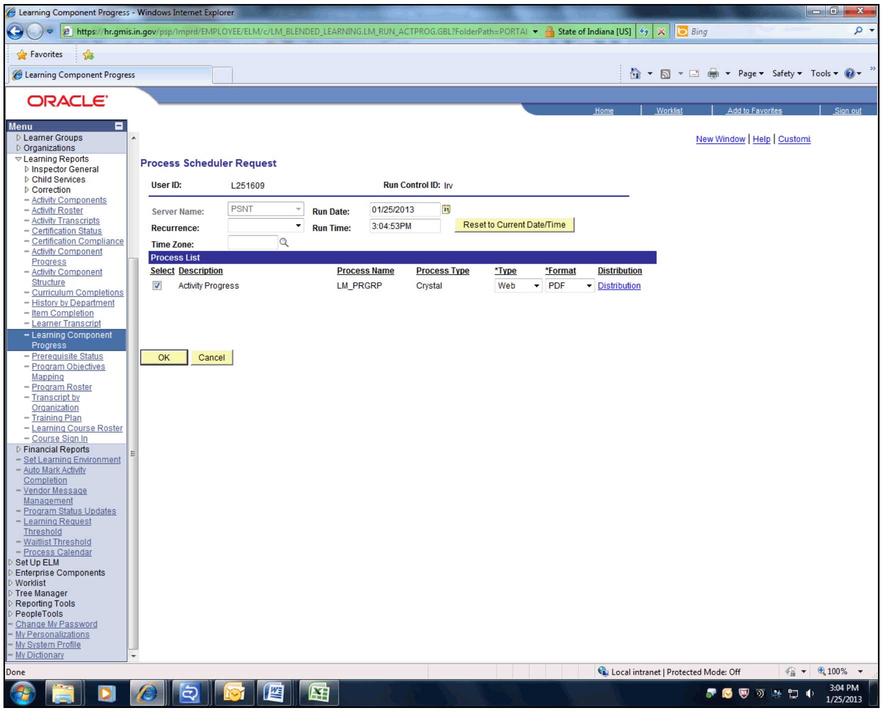
Step	Action
2.	Click the **Learning Reports** link. Learning Reports
3.	Click the **Learning Component Progress** link. Learning Component Progress



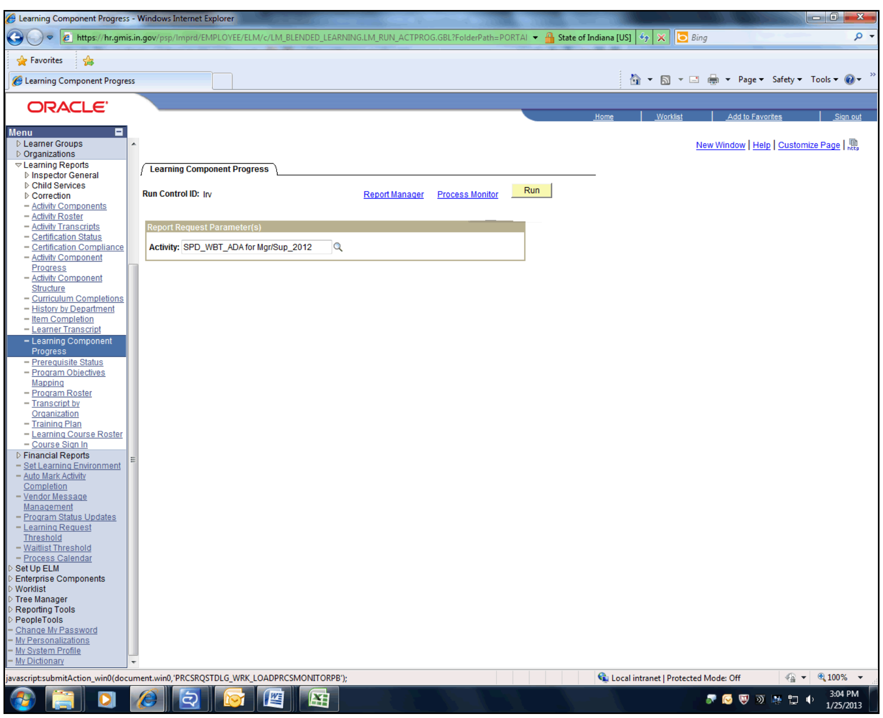
Step	Action
4.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab. Click the **Search** button. 



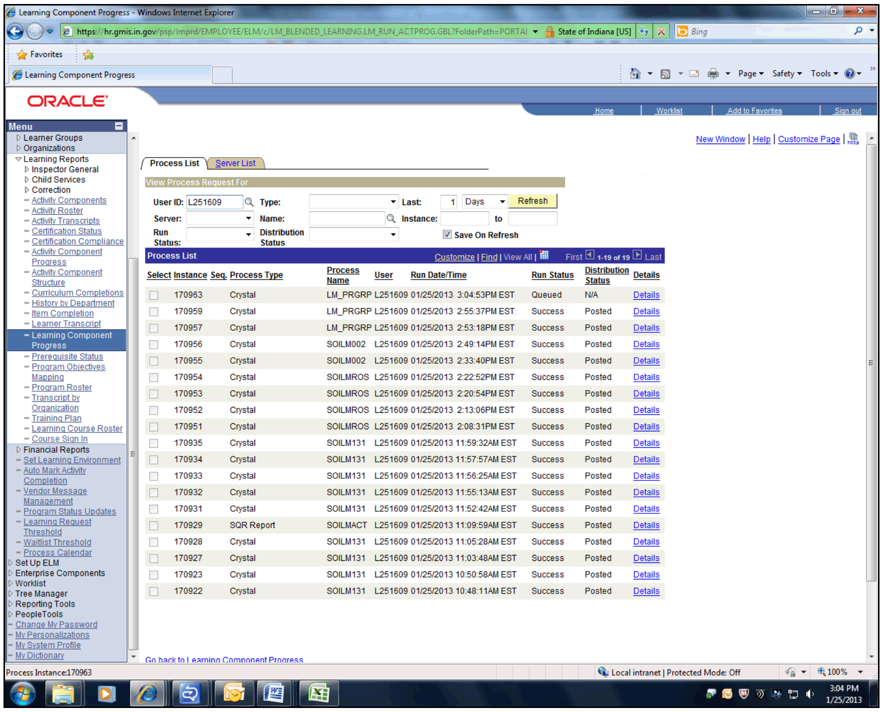
Step	Action
5.	You can type in the Activity Code/ID or click the **Look up (Alt+5)** button.
6.	Click the **Activity Code** list item. Activity Code
7.	Type in Activity Code and click the **Look Up** button. Look Up
8.	Click the **Activity Code** link. SPD WBT ADA for Mgr/Sup 2012
9.	Click the **Run** button. Run



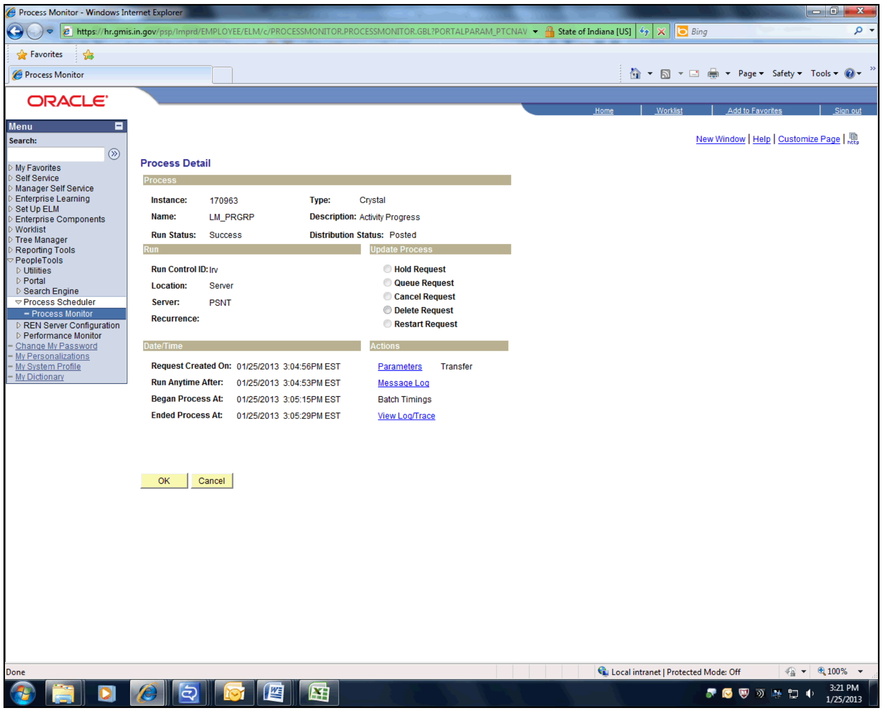
Step	Action
10.	Click the **OK** button. OK



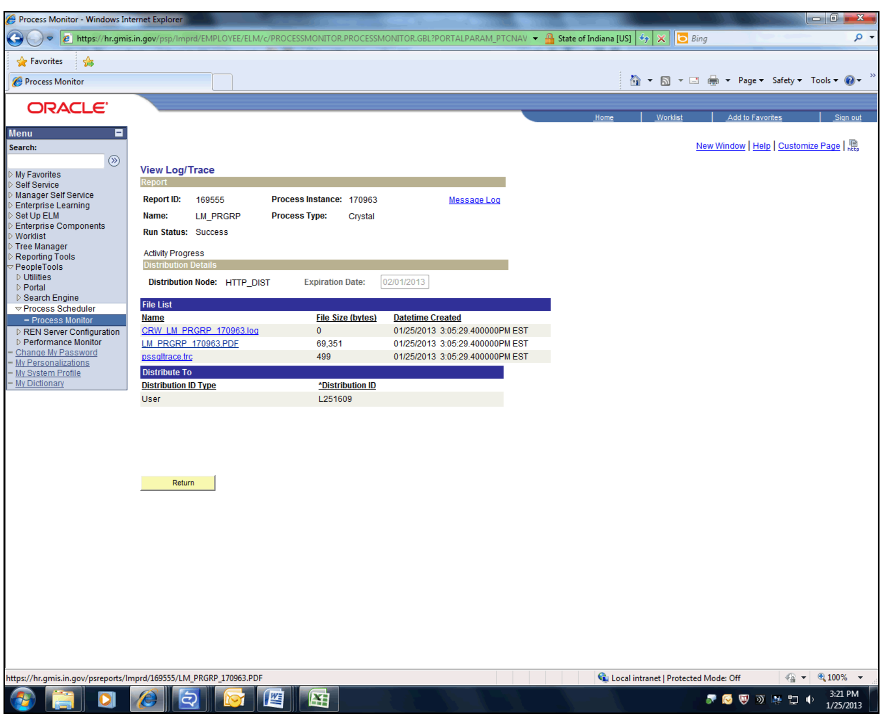
Step	Action
11.	Click the **Process Monitor** link. Process Monitor



Step	Action
12.	Click the Refresh button until the **Run Status** column status is Success and the **Distribution Status** column status is Posted. Click the **Refresh** button. Refresh
13.	Click the **Details** link. Details

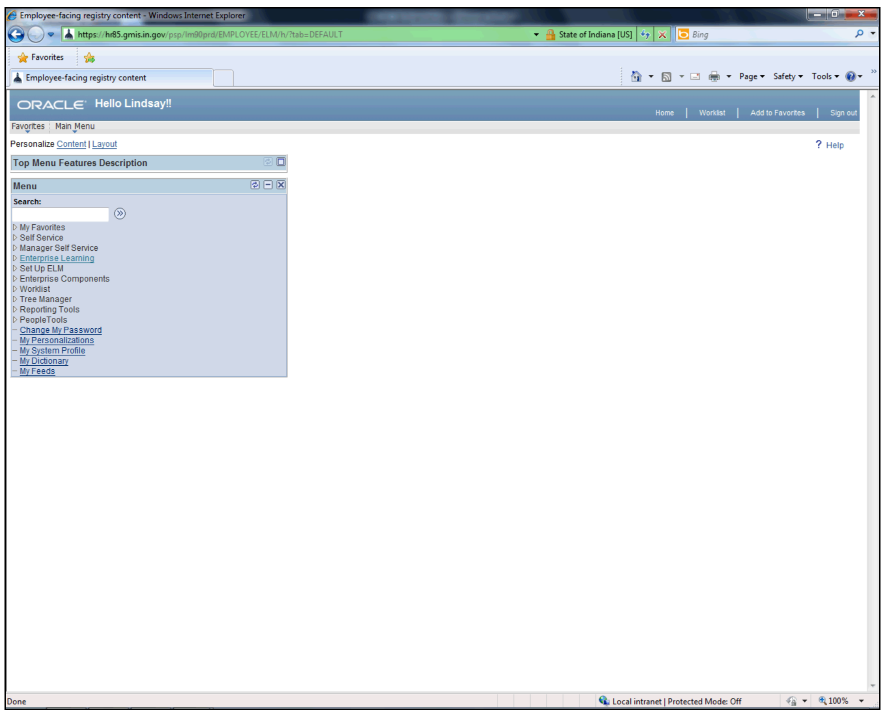


Step	Action
14.	Click the **View Log/Trace** link. View Log/Trace

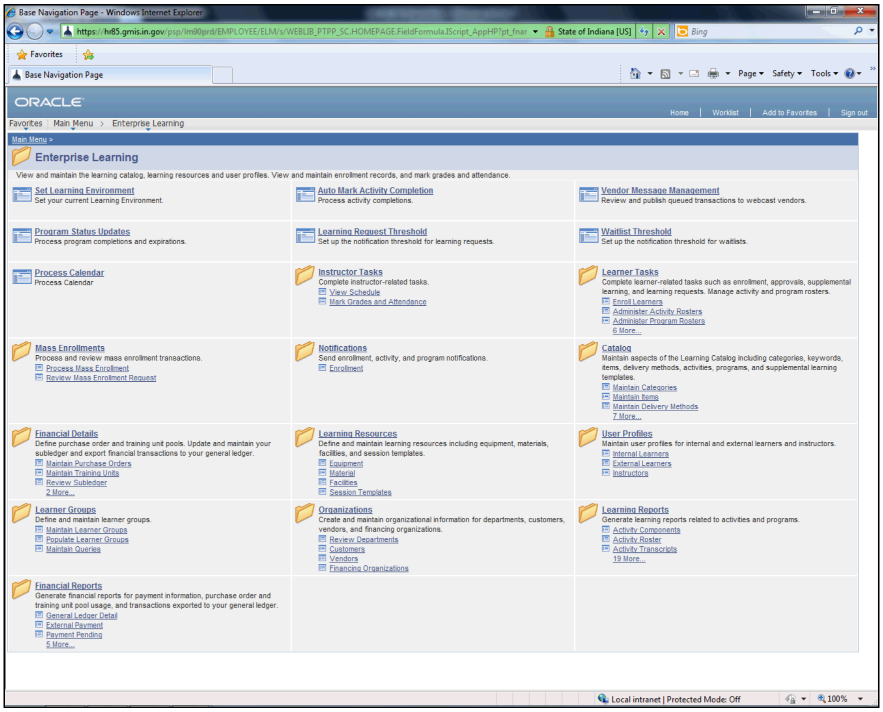


Step	Action
15.	Click the **PDF** link to review the learning component progress report. LM_PRGRP_170963.PDF
16.	**End of Procedure.**

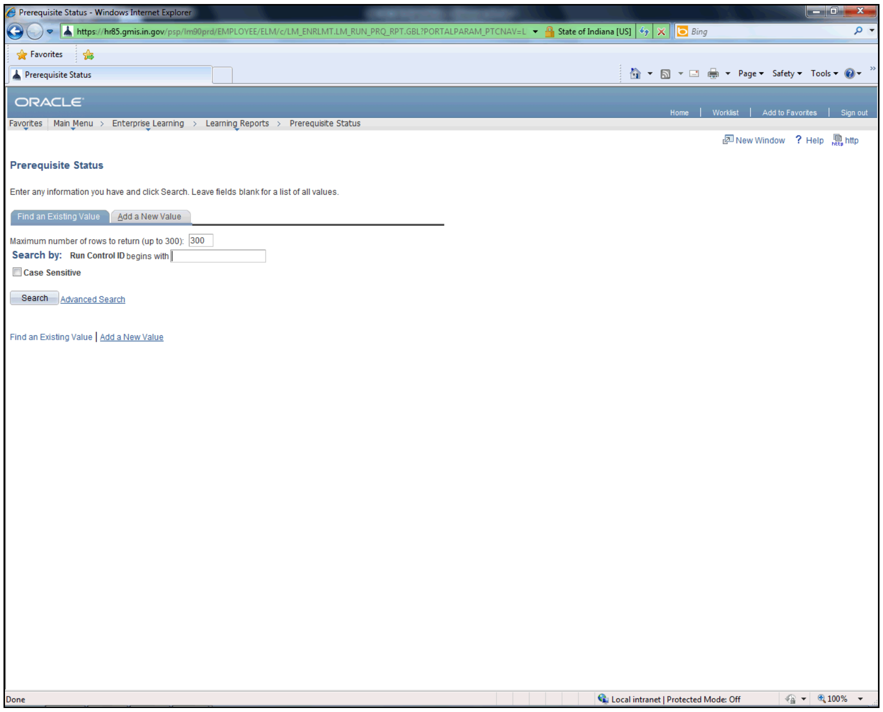
How to Review the Prerequisite Status Report

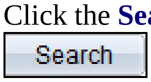


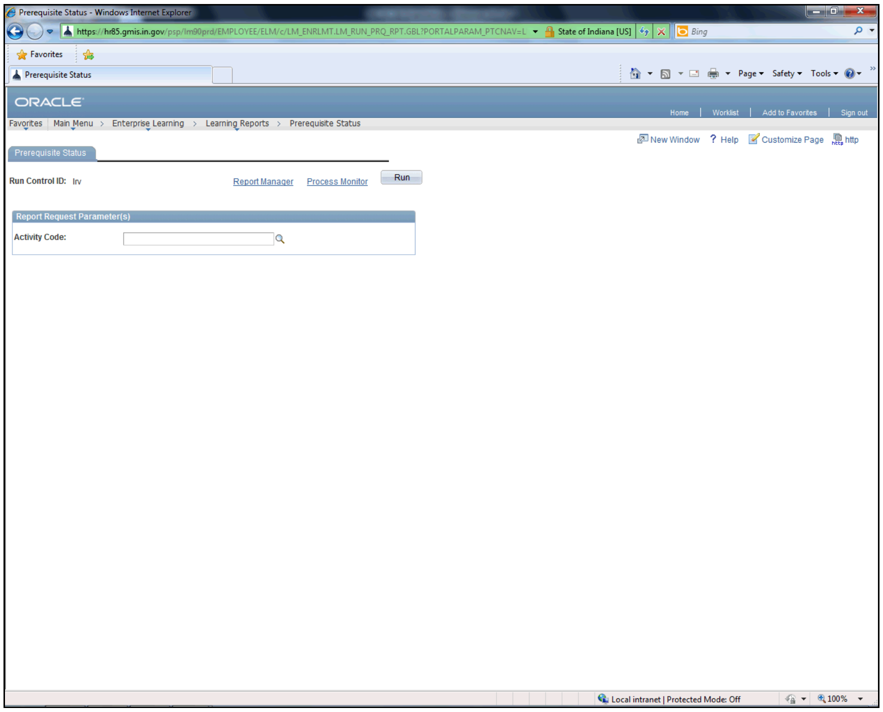
Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning



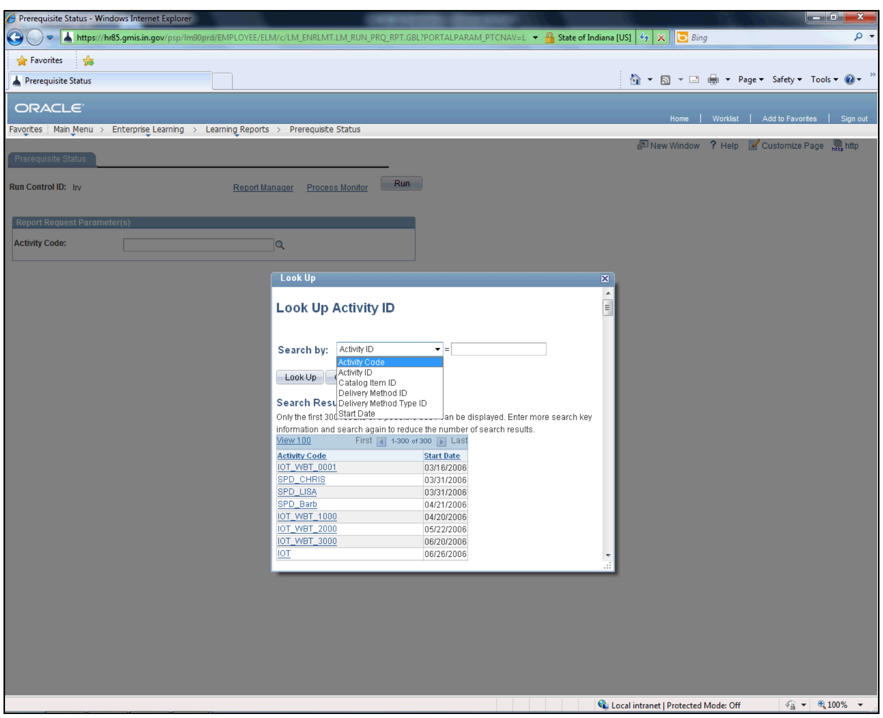
Step	Action
2.	Click the **Learning Reports** link. Learning Reports
3.	Click the **Prerequisite Status** link. Prerequisite Status



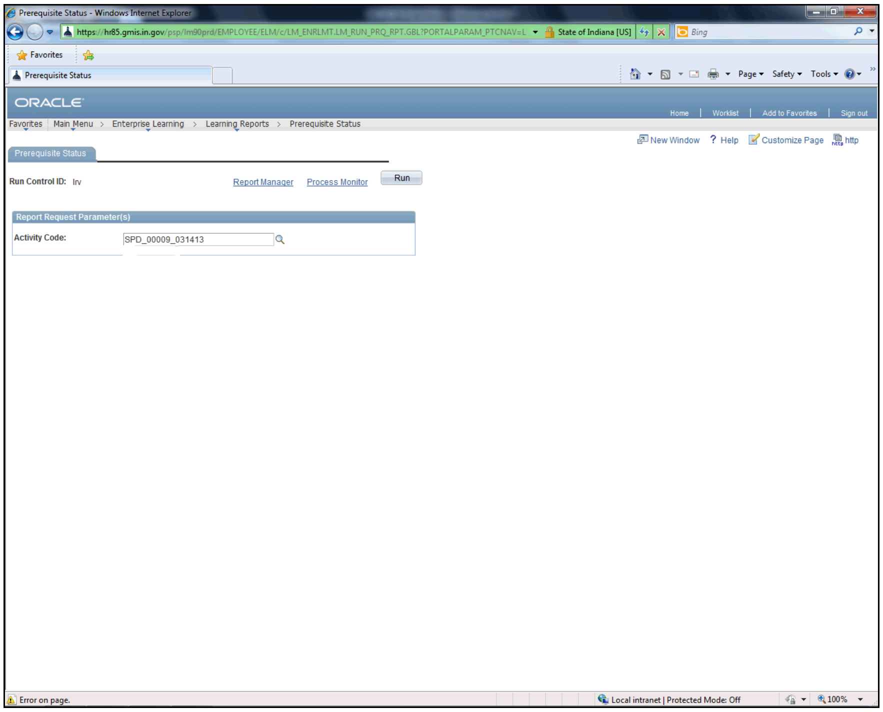
Step	Action
4.	Enter a run control ID into the **Run Control ID begins with** field. New run control ID's may be added by clicking the **Add a New Value** tab. Click the **Search** button. 



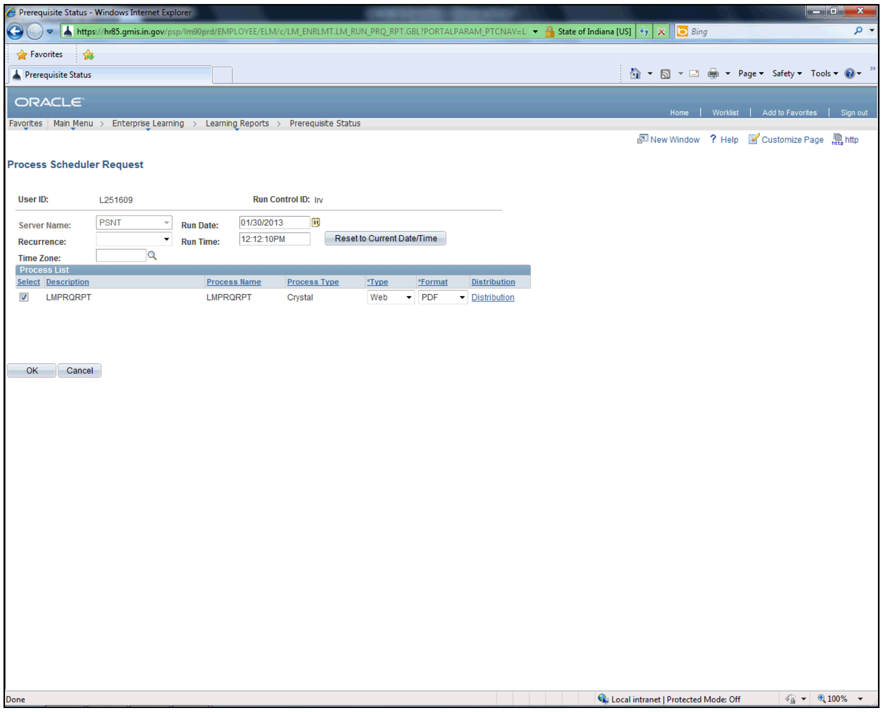
Step	Action
5.	Enter the Activity Code or click the **Look Up** button.



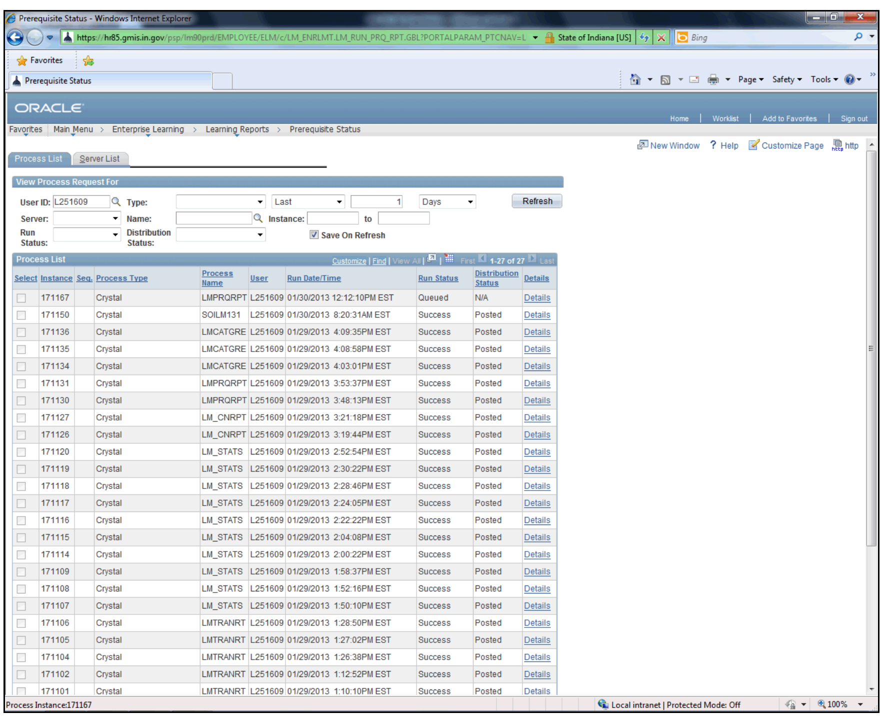
Step	Action
6.	You can search by the Activity ID or Code and click the **Look Up** button. **NOTE:** If you don't know the Activity Code you can use the Advanced Look Up feature. Click the **Look Up** button. Look Up
7.	Click the **Activity Code** link that matches the naming convention for the course. SPD_00009_031413



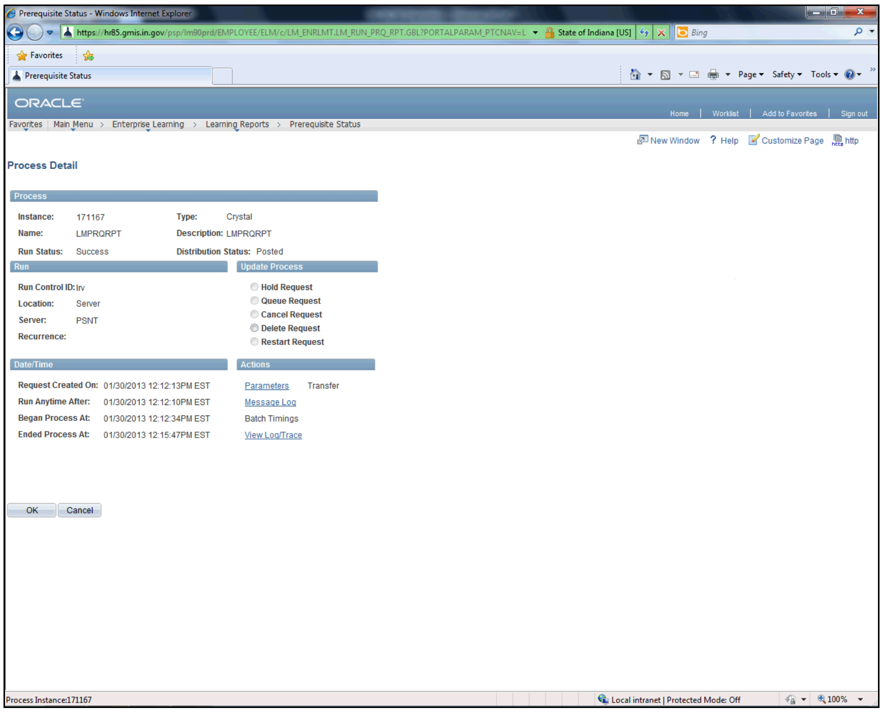
Step	Action
8.	Click the **Run** button. Run



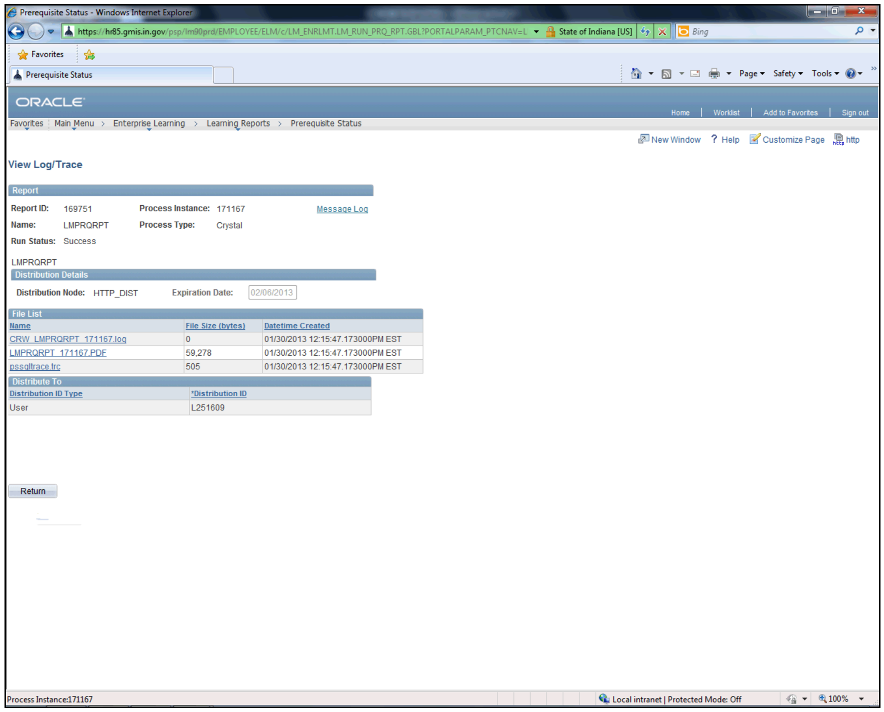
Step	Action
9.	Click the **OK** button. OK



Step	Action
10.	Click the Refresh button until the **Run Status** column status is Success and the **Distribution Status** column status is Posted. Click the **Refresh** button. Refresh
11.	Click the **Details** link. Details



Step	Action
12.	Click the **View Log/Trace** link. View Log/Trace



Step	Action
13.	Click the **PDF** link to review the Prerequisite Status report. LMPRQRPT_171167.PDF
14.	**End of Procedure.**

Instructor Tasks

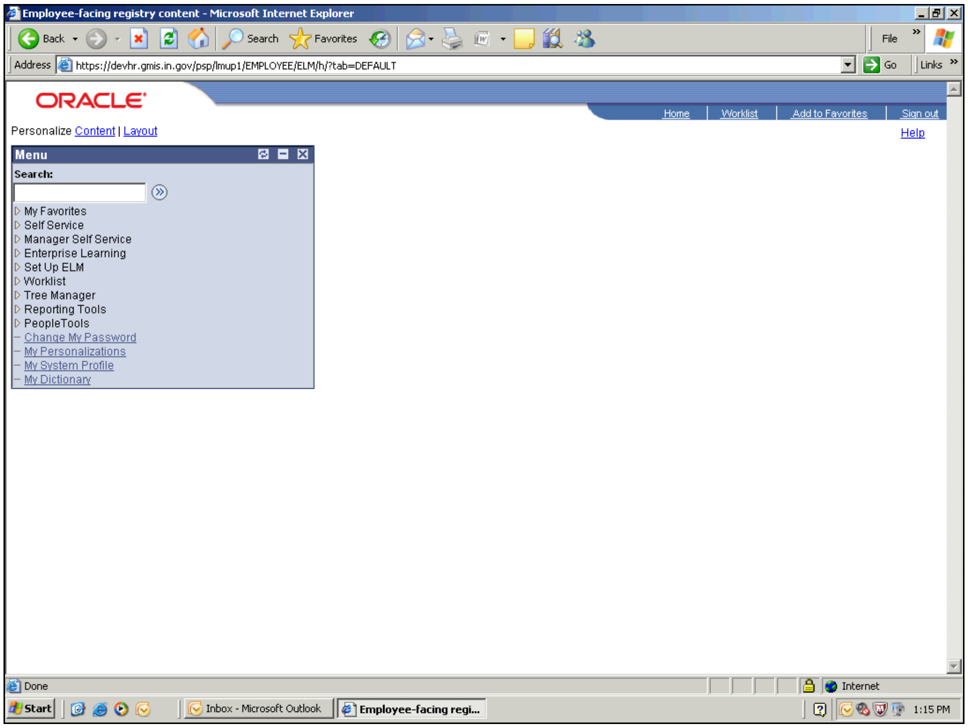
Enterprise Learning Management provides instructor support features that can be used to review teaching schedules and activity rosters. Activity rosters assist with managing attendance and grading for learning activities.

Instructor schedules are only available to persons identified as an instructor during item and/or activity set-up. Individuals are only able to view their personal instructor schedule.

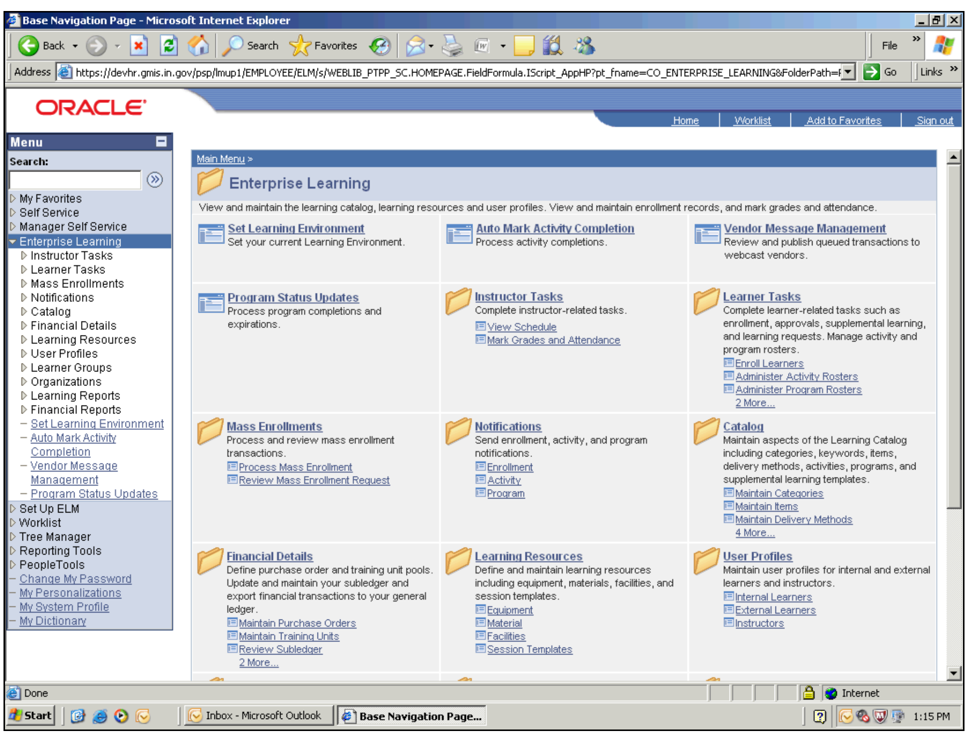
How to Mark Grades and Attendance

Procedure

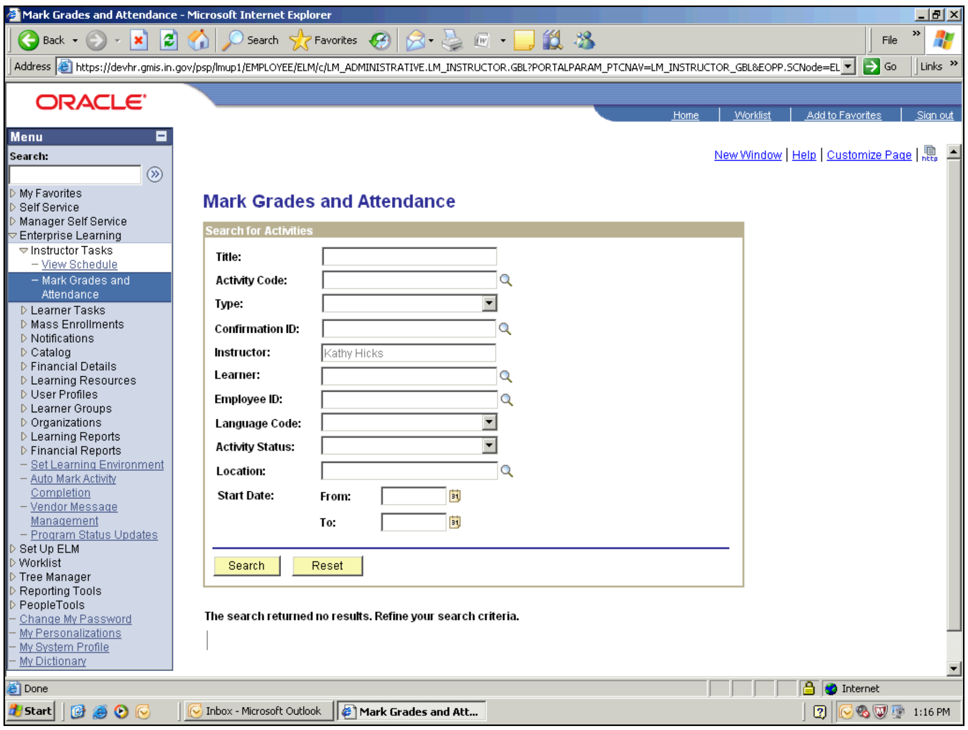
This lesson will teach instructors how to mark grades and attendance for an activity using the activity component roster or the activity roster.



Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning



Step	Action
2.	Click the **Instructor Tasks** link. Instructor Tasks
3.	Click the **Mark Grades and Attendance** link. Mark Grades and Attendance



Step	Action
4.	The instructors name automatically defaults into the **Instructor** field. Enter additional **search criteria** to search for activities assigned to the instructor. Kathy Hicks

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of items associated with the search criteria. At times, PeopleSoft may only return the first 300 items for undefined searches. To locate items in lists with more than 300 items, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

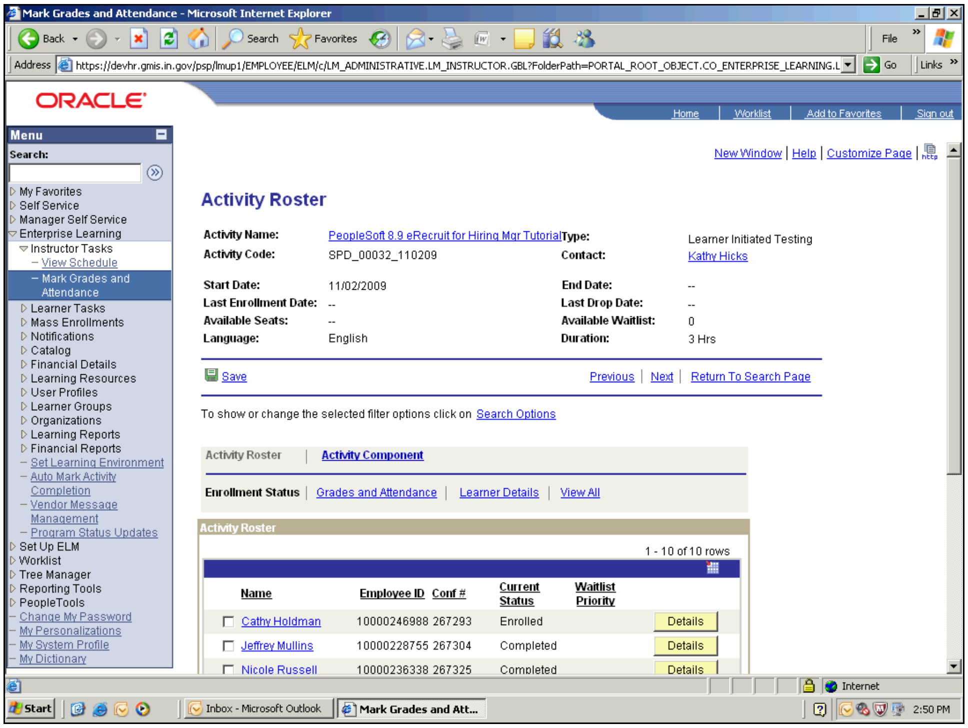
Step	Action
5.	Click the **Search** button to locate activities. 
6.	Locate the correct learning activity in the list of values. 

The **Learning Activities** section blue title bar lists the number of returns on the right-hand side of the blue title bar. The search may return more learning activities than can be viewed on one page. To view additional activities use the following options located in the **Learning Activities** blue title bar:

- Use the **scroll left arrow** or **scroll right arrow buttons** on each side of the numbered returns (use **First** link to return to the first page of returns and use the **Last** link to go to the last page of returns), or;
- Click the **View All** link to view all of the returns or increase the number of returns on the page, or;
- Click the **Find** link to locate a specific value within the list.

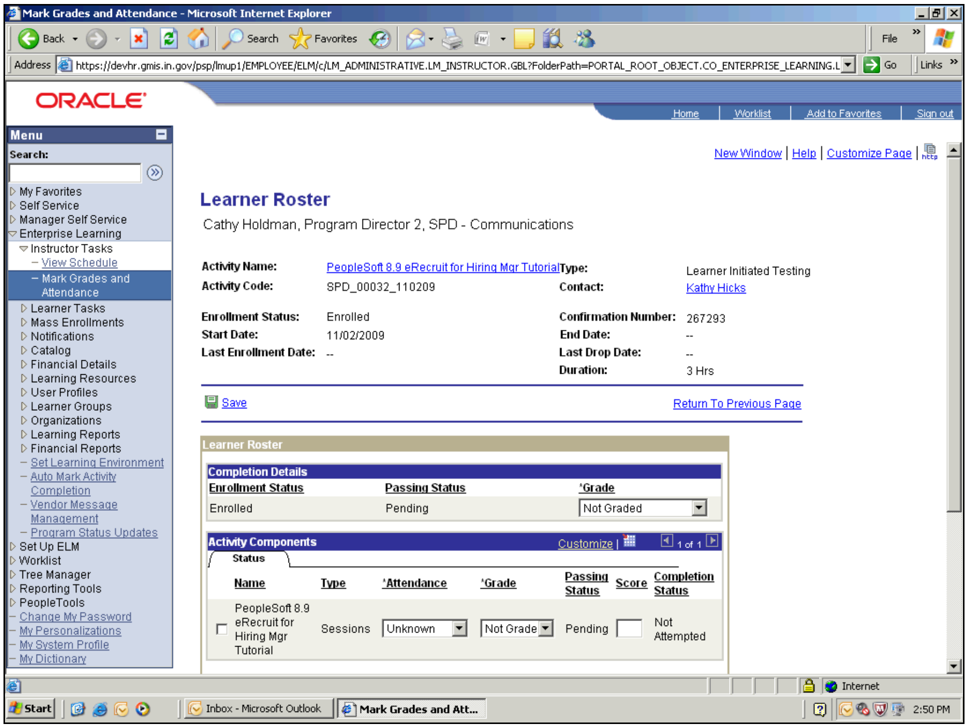
In addition, clicking the **column titles** will order the list either alphabetically or chronologically depending on the column title that was clicked.

Step	Action
7.	After locating the learning activity, click the **Roster** button to the right of the activity. 



Step	Action
8.	The system defaults to display the **Activity Roster - Enrollment Status** search results in a list. The list is in the **Activity Roster** section of the page. To enter individual scores for learners in the activity roster, click the **Details** button to the right of the learner's name. Details

The **Details** button is not available for those learners whose enrollment was never approved or was denied.

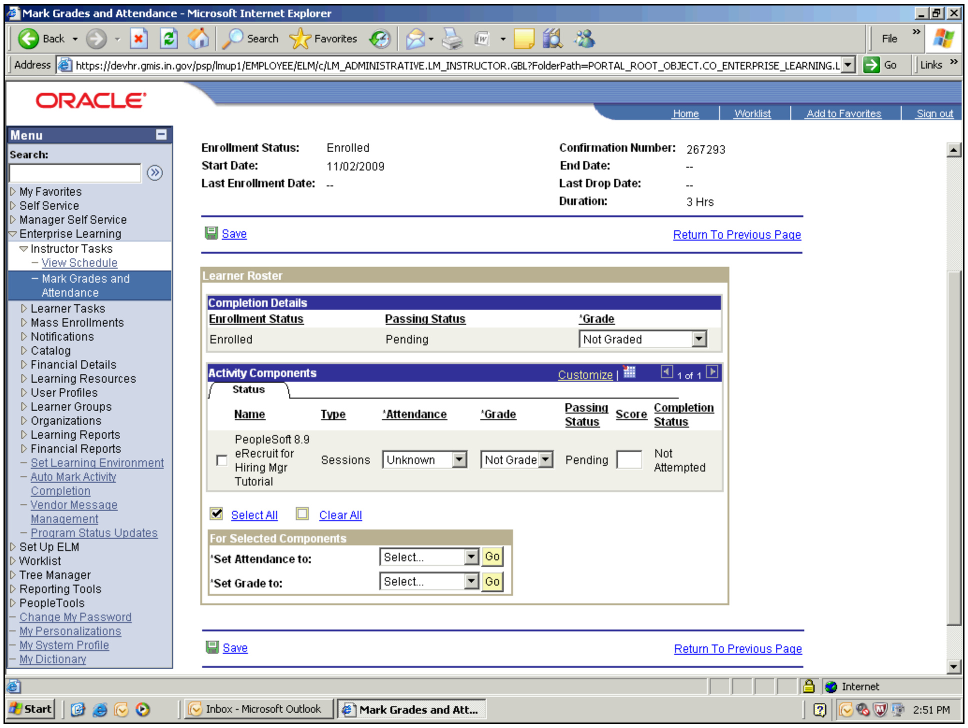


Step	Action
9.	The **Learner Roster** section appears to update the **attendance**, **grades**, and enter a **score** the selected learner for one or all activity components for the activity.
10.	Click the **Grade** drop-down menu button to select the learner's grade in the **Completion Details** section.
11.	Make the changes to the learner's **attendance**, **grade**, and **score** in the **Activity Components** section.

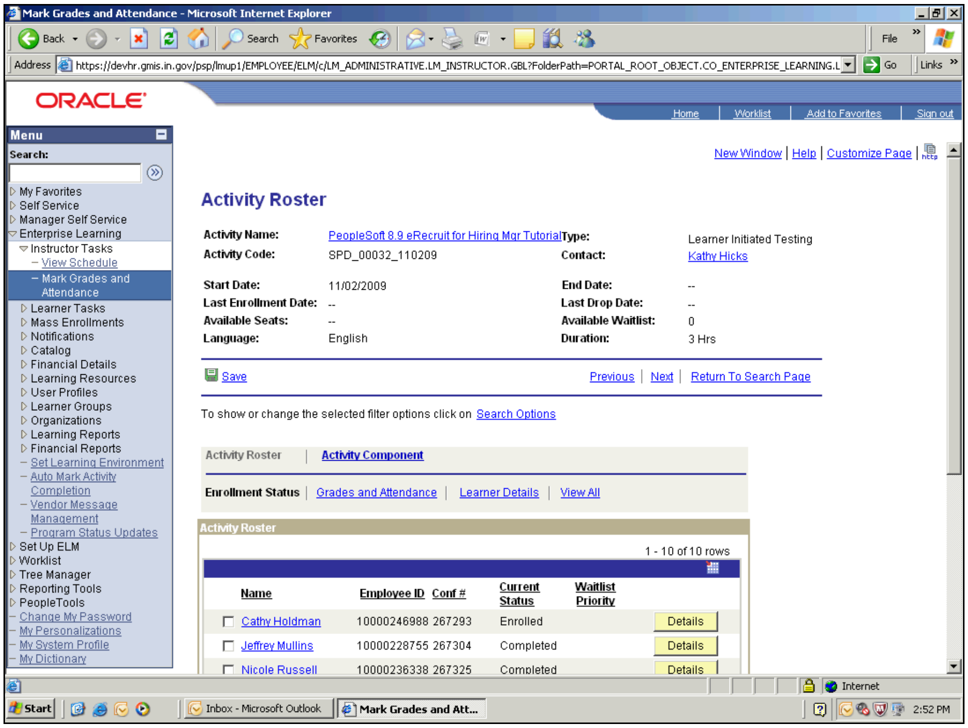
If there are multiple activity components, more than one component may be selected to perform a single action by checking the checkboxes of the left of activity names in the **Name** column. For example, to change an attendance and/or grade status for multiple activity components at the same time, check the checkbox for each activity the status is to be changed.

After checking the checkboxes of the activity components to process an action for, locate the **Set Attendance to** or **Set Grade to** drop-down menu button(s) to select the action(s) to be processed from the list of values (**Set Attendance to** or **Set Grade to** lists are often located at the bottom of the page). Then, click the **Go** button to

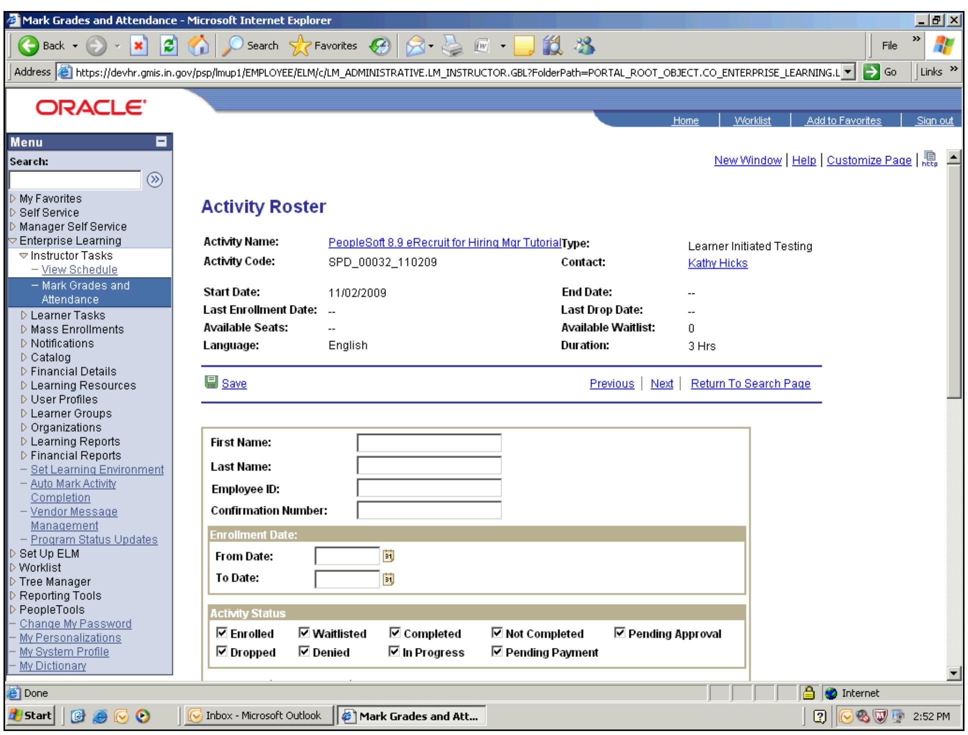
	complete the process.



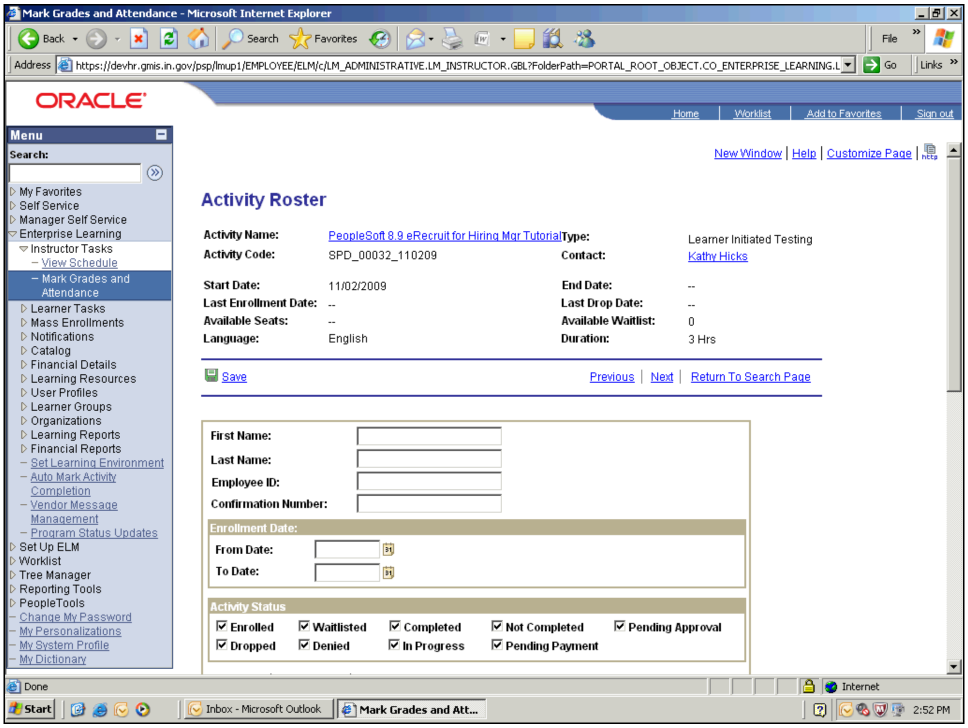
Step	Action
12.	Click the **Save** link. Save
13.	Click the **Return To Previous Page** link. Return To Previous Page



Step	Action
14.	To locate an individual learner within a multi-page list, click the **Search Options** link. Search Options



Step	Action
15.	Enter search criteria for the learner.

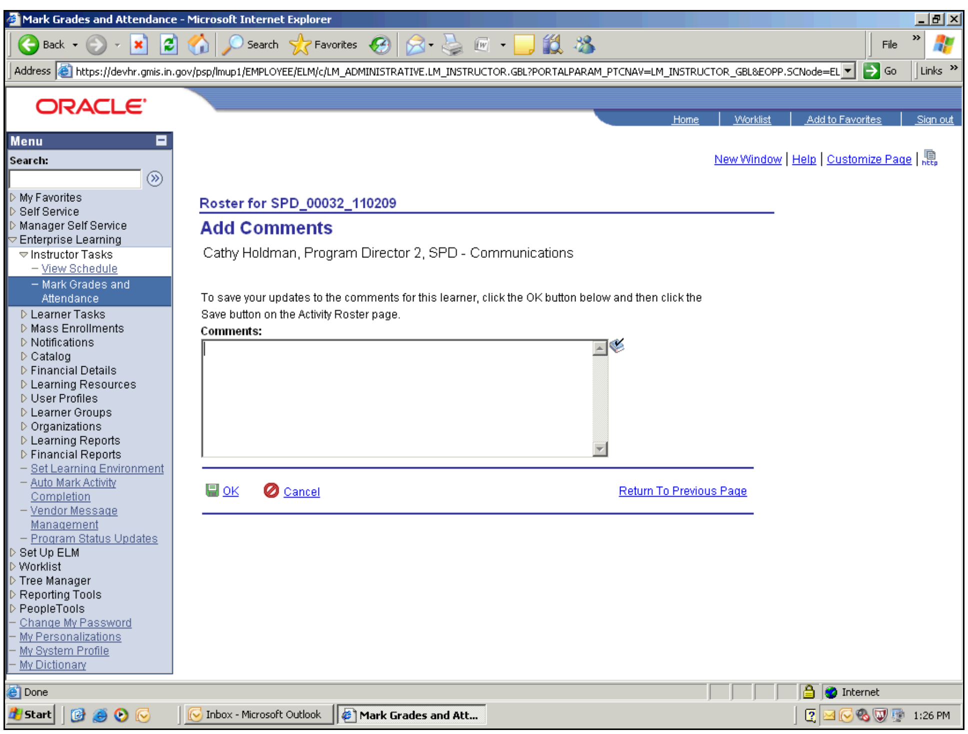


Step	Action
16.	Click the **Search** button to locate the learner. (This process may be done to search for individual learners on any listing.) Save
17.	Click the **Grades and Attendance** link. Grades and Attendance
18.	**Grades**, **attendance**, and **scores** can also be changed and/or entered for <u>individual or multiple learners</u> from the Grades and Attendance Activity Roster Select...

Multiple learners may be selected to perform a single action by checking the checkboxes of the left of learner's names in the **Name** column. For example, to change an activity status for multiple learners to the same status at the same time, check the checkbox for each learner whose status is to be changed.

After checking the checkboxes of the individual learners to process an action for multiple learners, locate the **Set Attendance to** or **Set Grade to** drop-down menu button(s) to select the action(s) to be processed from the list of values (**Set Attendance to** or **Set Grade to** lists are often located at the bottom of the page). Then, click the **Go** button to complete the process.

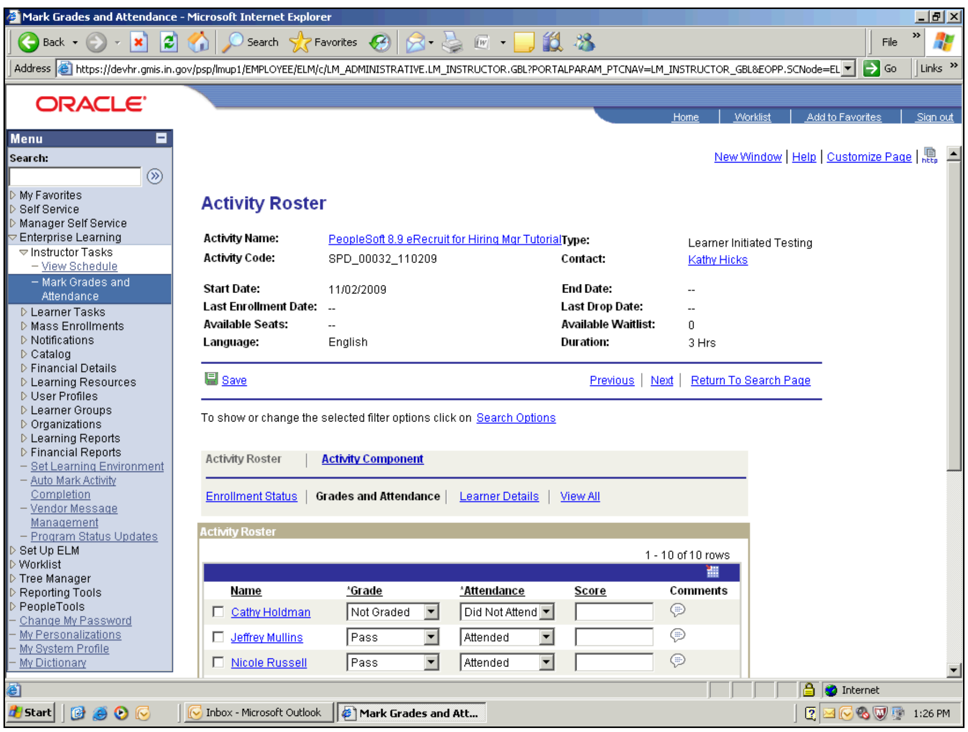
Step	Action
19.	If different grades or attendances are required for different sets of multiple learners, click the **Clear All** link to clear all of the checkboxes for the first action. Then, check the checkboxes for the next set of learners to perform the next multiple action for. Clear All
20.	Click the **View All** link to view a list of learners combining all of the fields from the **Enrollment Status**, **Grades and Attendance**, and **Learner Details** pages, if desired. View All
21.	To add comments regarding a learner's **grade**, **attendance**, or **score**; click the **Comments** button to the right of the **Score** field for the learner.



Step	Action
22.	Enter the instructor comments into the **Comments** field.

The system displays the comments information entered into the **Comments** field on the self-service **Activity Progress** page that learners and managers can access. Comments also appear on some reports.

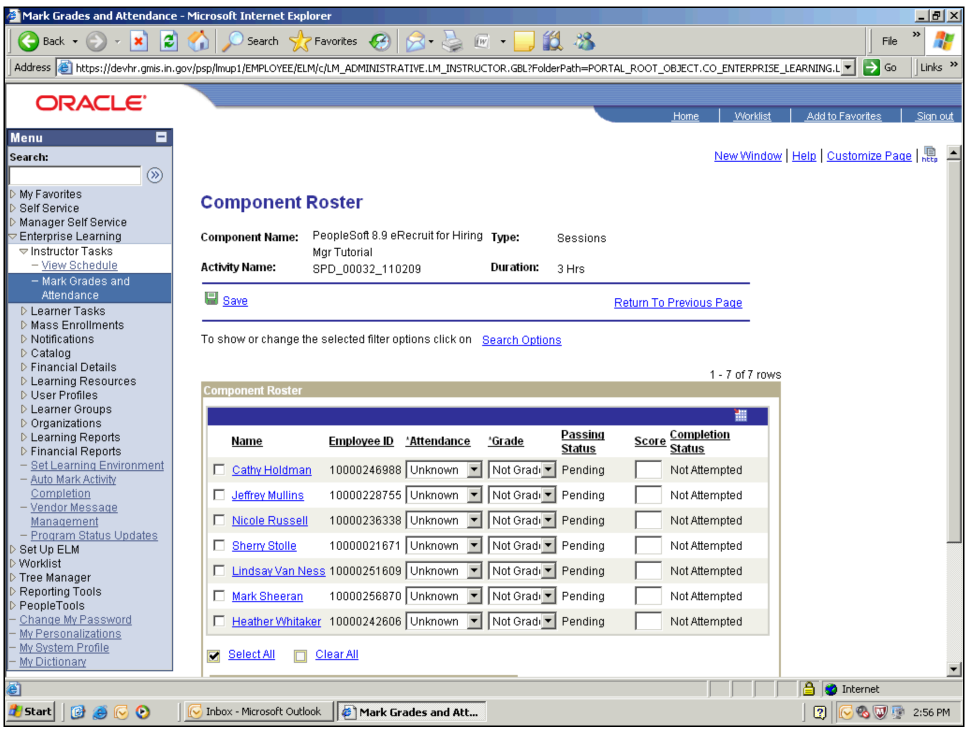
Step	Action
23.	When finished entering comments, click the **OK** link. OK



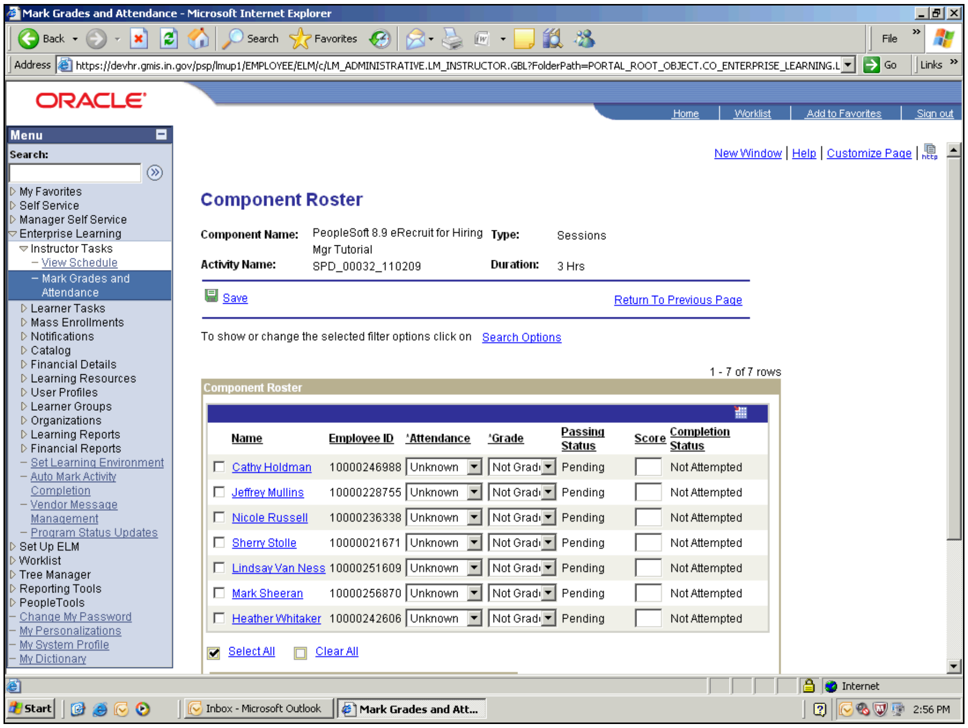
Step	Action
24.	Click the **Save** link to save any changes or comments to the activity roster. Sav
25.	To make changes to <u>multiple learner</u> **attendance**, **grades**, and **scores** for all components within an activity, click the **Activity Component** link. Activity Component

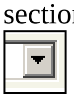
Changing a learner's grade and attendance information for an activity does not affect attendance and grade information entered for the activity's components. However, **changing a learner's grade and attendance information for a component DOES affect the attendance and grade information for an activity.**

Step	Action
26.	To enter individual or multiple scores for learners in the component roster, click the **Details** button to the right of the component's name in the **Activity Components** section. Details



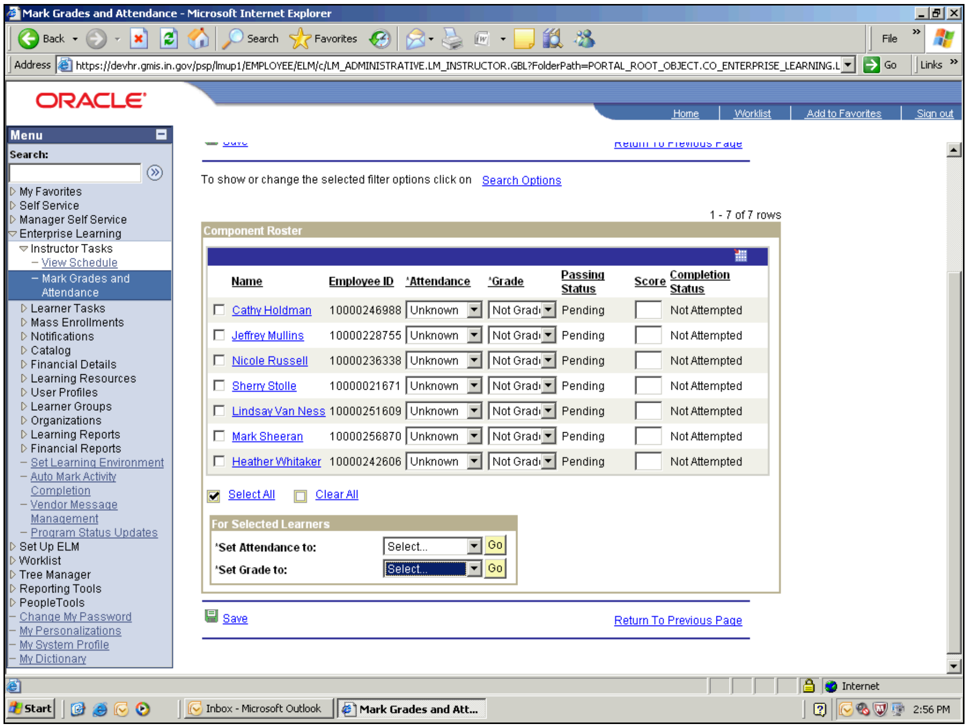
Step	Action
27.	The **Component Roster** section appears to update the **attendance**, **grades**, and enter a **score** for the selected learner(s) for the activity component and all activities within the component.



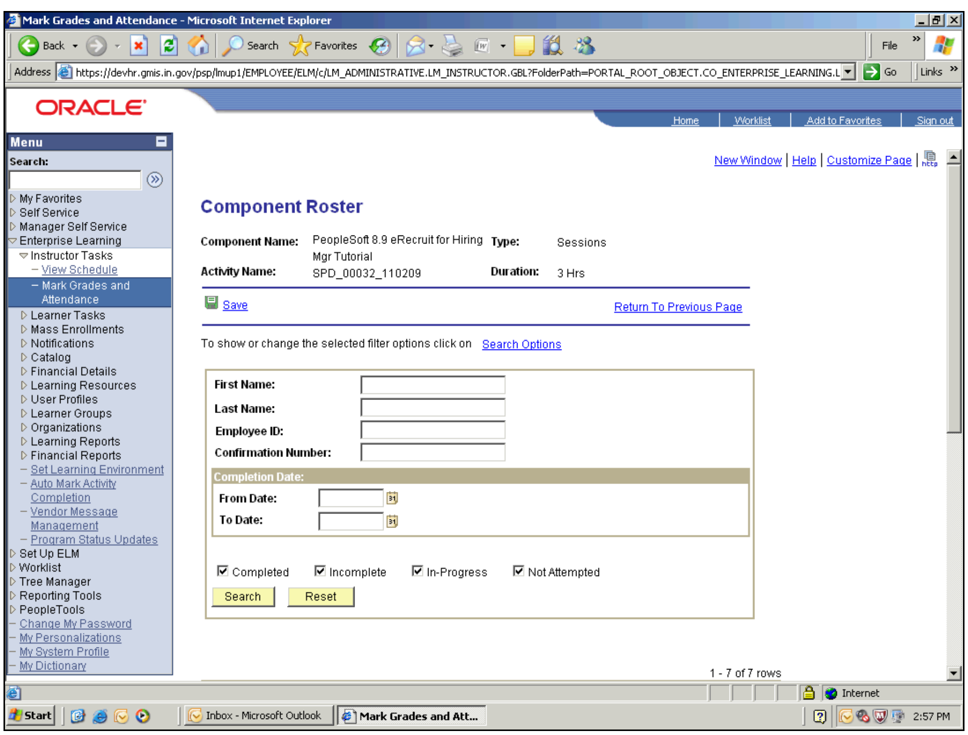
Step	Action
28.	Make the changes to the learner's **attendance**, **grade**, and **score** in the **Component Roster** section. 

	Multiple learners may be selected to perform a single action by checking the checkboxes of the left of learner’s names in the **Name** column. For example, to change a component status for multiple learners to the same status at the same time, check the checkbox for each learner whose status is to be changed.

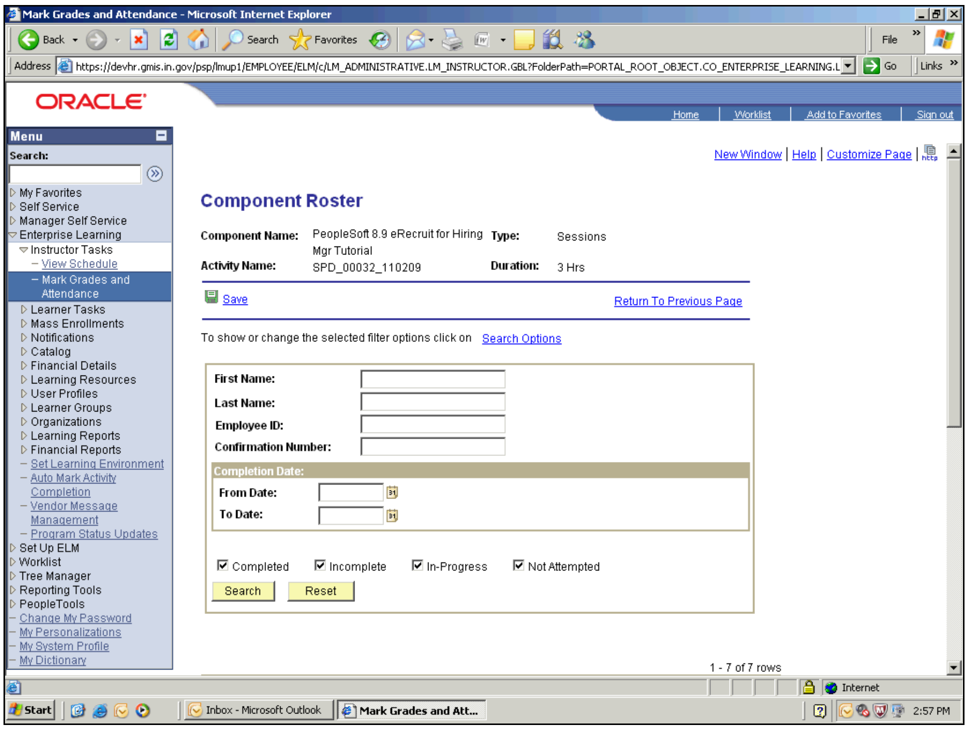
	After checking the checkboxes of the activity components to process an action for, locate the **Set Attendance to** or **Set Grade to** drop-down menu button(s) to select the action(s) to be processed from the list of values (**Set Attendance to** or **Set Grade to** lists are often located at the bottom of the page). Then, click the **Go** button to complete the process.



Step	Action
29.	To locate an individual learner within a multi-page list, click the **Search Options** link. Search Options



Step	Action
30.	Enter search criteria for the learner.

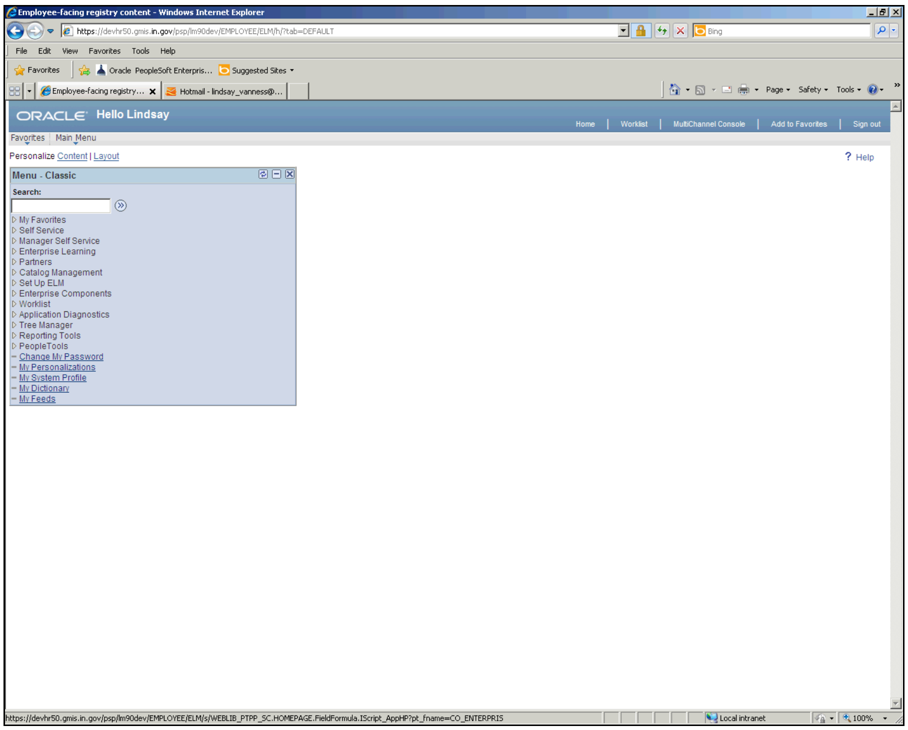


Step	Action
31.	Click the **Search** button to locate the learner. (This process may be done to search for individual learners on any listing.) Search
32.	Click the **Save** link to save any changes or comments to the component roster. Save
33.	Click the **Return To Previous Page** link to return to the **Activity Roster** page, if desired. Return To Previous Page
34.	Congratulations! You have successfully manually updated learner grades, attendance, and/or scores using activity or component rosters. **End of Procedure.**

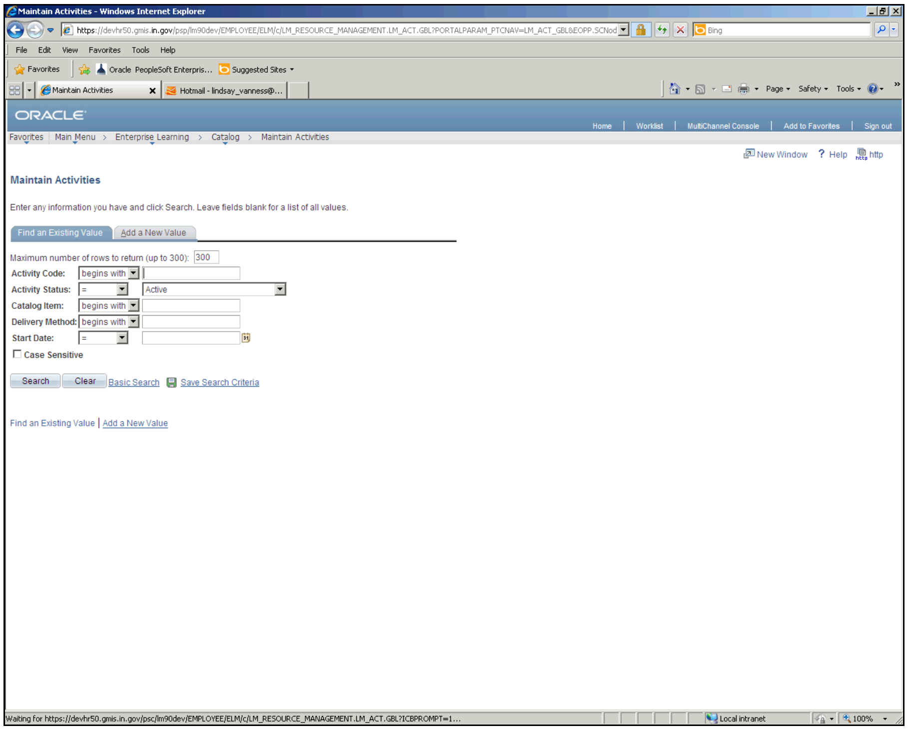
How to Conclude a Course

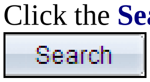
Procedure

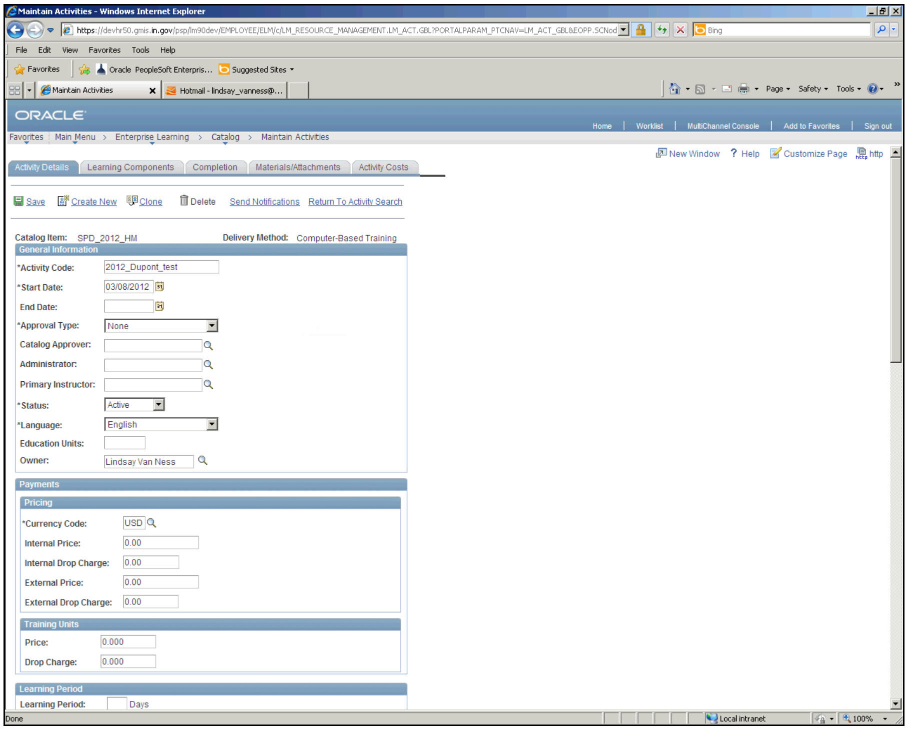
This module will instruct you on how to close out an active course. It is important to have marked attendance and grades first.

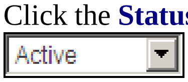


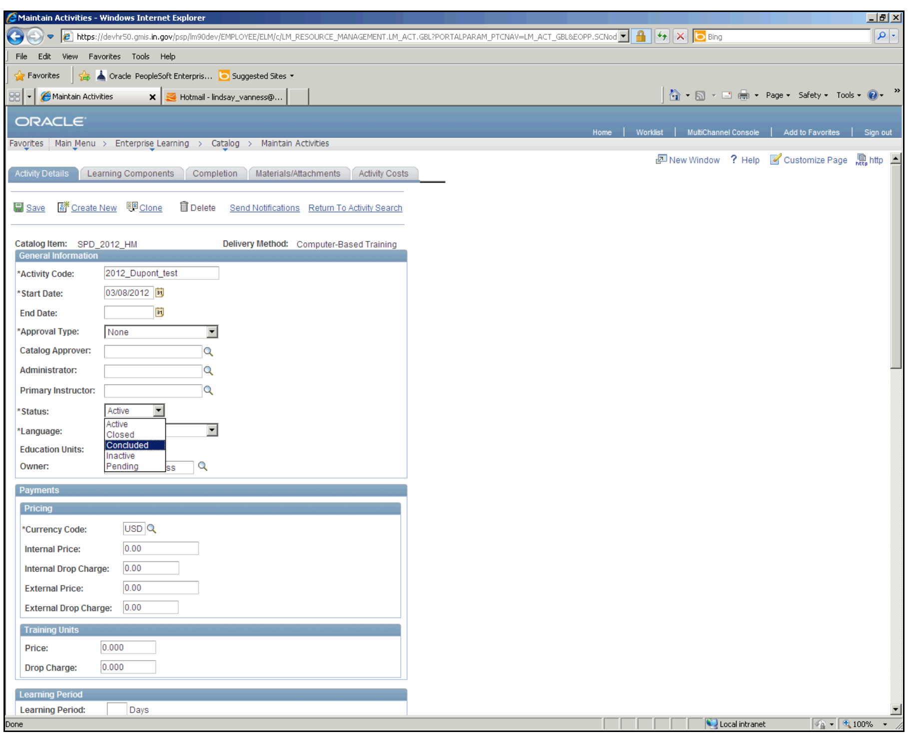
Step	Action
1.	Click the **Enterprise Learning** link. Enterprise Learning
2.	Click the **Catalog** link. Catalog
3.	Click the **Maintain Activities** link. Maintain Activities



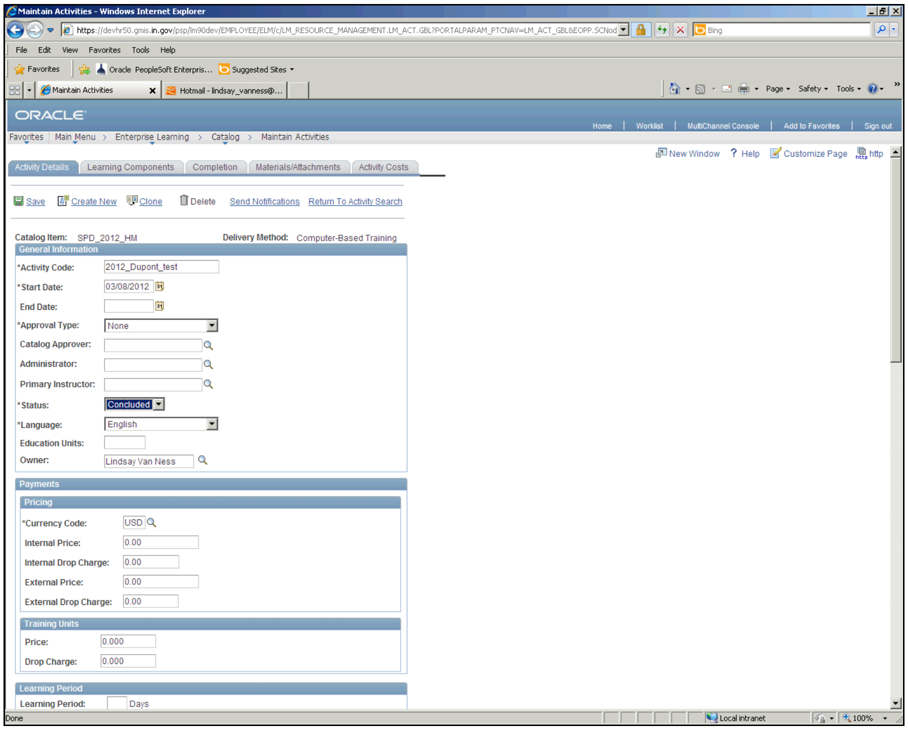
Step	Action
4.	Search for the **Activity Code** that you wish to conclude.
5.	Click the **Search** button. 



Step	Action
6.	Click the **Status** list to change the course from Active to Concluded. 



Step	Action
7.	Click the **Concluded** list item. Concluded



Step	Action
8.	Click the **Save** link. Save
9.	**End of Procedure.**