Job Aid: Record Learning - Multiple

Purpose

The purpose of the Record Learning – Multiple job aid is to guide you through the step-by-step process of recording completions for items,scheduled offerings and external events; view a user's learning plan to verify the completion. Step-by-step instructions to use the Learning Event Editor to make changes to a completed learning event. Related terminology is provided.

In this Job Aid, you will learn how to:

- Use Record Learning – Mulitple to Record Completion of an Item
- Use Record Learning – Mulitple to Record Attendance at External Event
- Use Record Learning – Mulitple to Record Completion of a Scheduled Offering
- View User Learning History tab
- Edit Learning Event Using Learning Event Editor

Terminology:

Learning Event: A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- A record of the attendance or completion of any external event that is considered important enough to document but not related directly to learning needs.

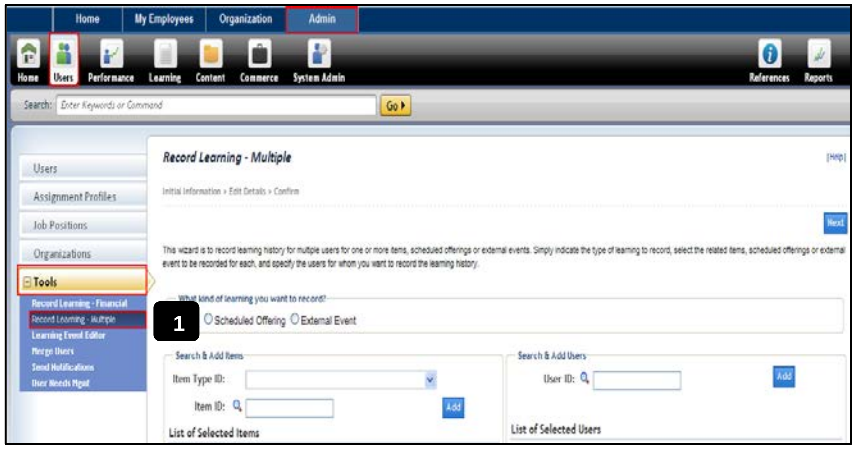
Types of Learning

- **Item Based Events**: Items are the primary events found in the list of learning events for users. Learning events for items include those created as scheduled offerings and those with online content where the system records the learning event when the user completes the content. All items may have a learning event recorded against them for any user, even if the item was not a part of his/her Learning Plan.
- **External Events**: A learning activity outside of the organization, such as a college course or a seminar, for which there is no item record in Plateau Learning, may be recorded in a user's Learning History.
- **Scheduled Offering**: An item or learning event with a scheduled date and time.

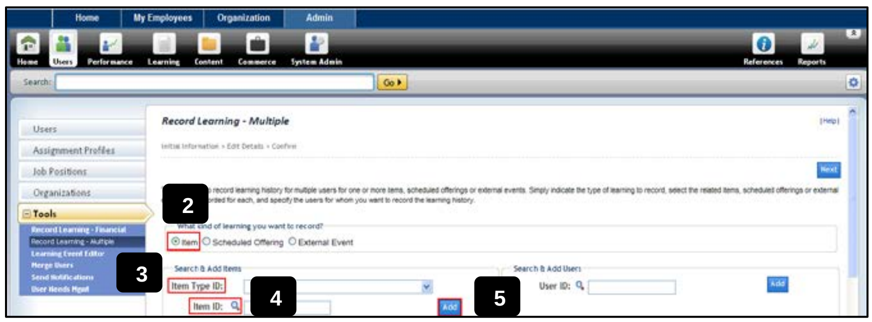
Task A. Record Completion of an Item

Note: Verify that the **Admin** tab is selected.

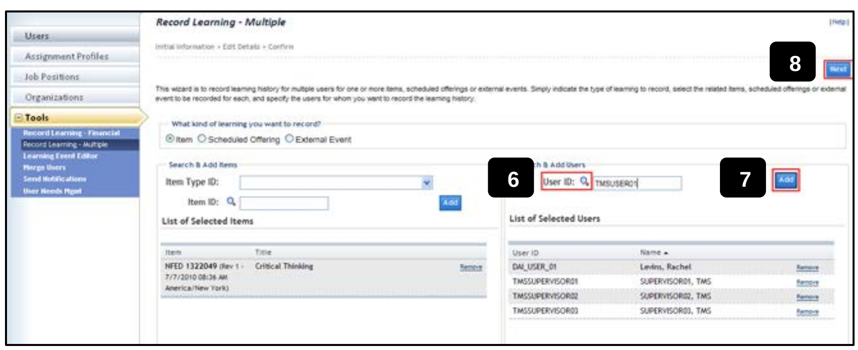
1. Navigate to **Users > Tools > Record Learning – Multiple**. The Record Learning – Multiple wizard displays.



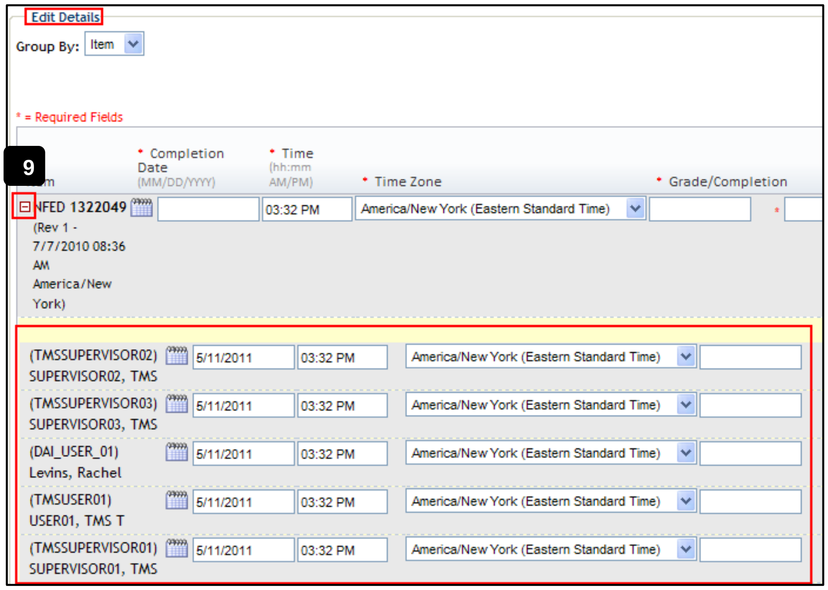
2. Select the **Item** radio button option.
3. In the **Search & Add Items** section, select the **Item Type ID** from the drop-down menu.
4. Enter the **Item ID** in the textbox exactly or click the **Search** icon to search for and select an item.
5. Click **Add**.



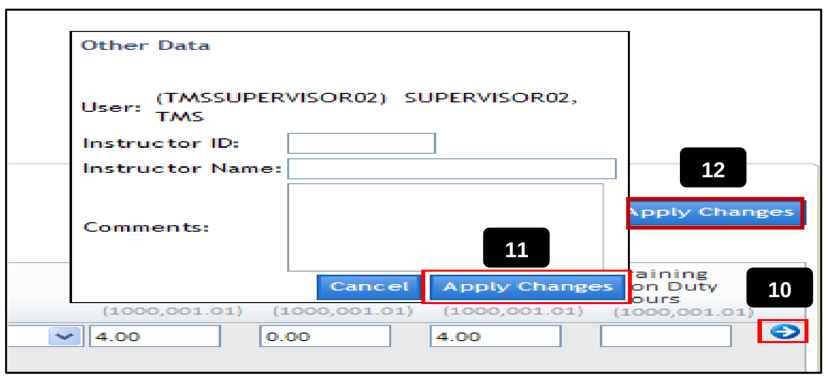
6. In the **Search & Add Users** section, enter a **User ID** exactly.
7. Click **Add** or click the **Search** icon to search for and select a **User ID**.
8. Click **Next**.



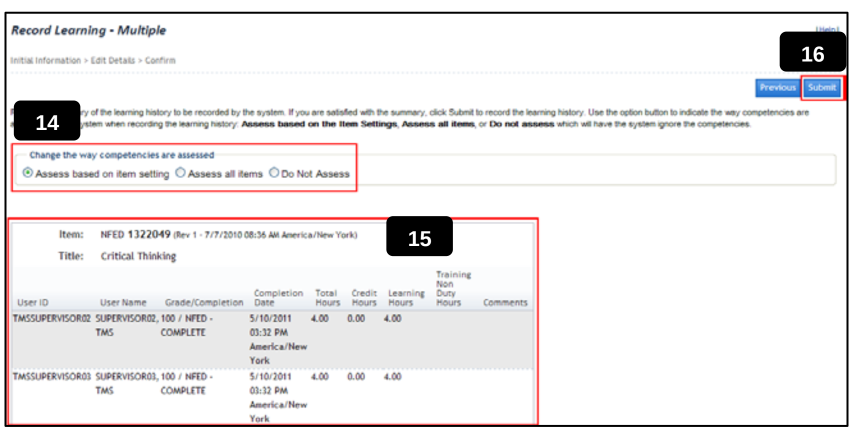
9. In the **Edit Details** section, enter details for the item for each user by clicking the **Expand** button:
    - **Completion Date** (for example, 04/01/2011)
    - **Time**
    - **Time Zone**
    - **Grade/Completion** status
    - Total hours, credit hours, contact hours, and CPE
10. Scroll to the right to click the **More Options** arrow to enter instructor information and comments. The Other Data pop-up displays.



11. Click **Apply Changes** to apply instructor or comment changes. The Other data pop-up closes.
12. Click **Apply Changes** to make the changes apply to all users
13. Click **Next**.



14. If competencies need to be assessed as a result of recording the learning event, click the **Assess based on item setting** checkbox.
15. Review learning event information.
16. Click **Submit**.

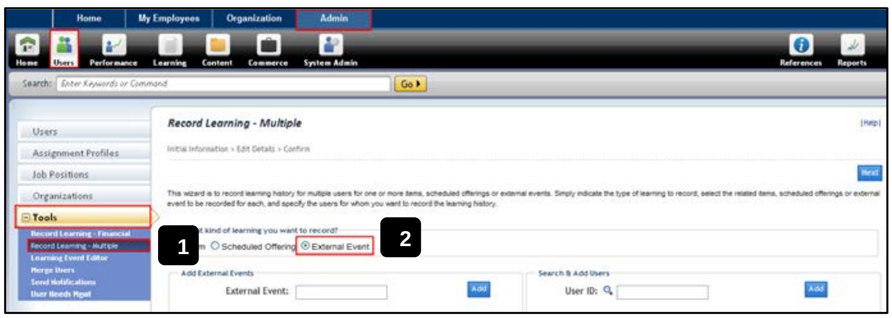


17. The application provides a status message to let you know that the learning event has been recorded successfully.
18. Click **Start Over…** to begin the Learning Event Recorder process again. This retains all users previously selected.

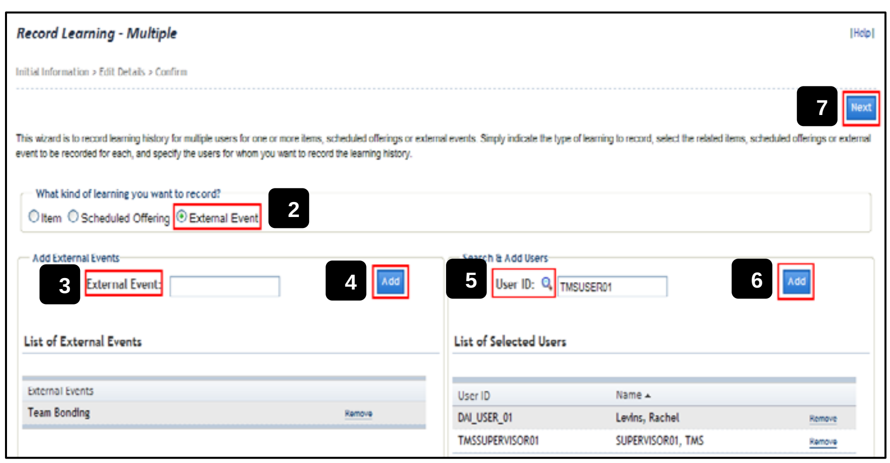
Task B. Record Attendance at External Event

Note: Verify that the **Admin** tab is selected.

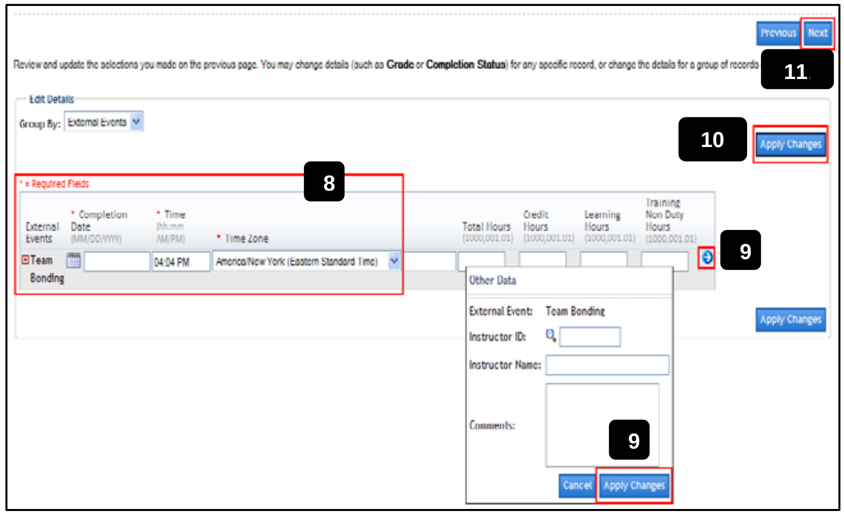
1. Navigate to **Users > Tools > Record Learning – Multiple** or enter **Record Learning** in the Search box. The *Recording Learning – Multiple* wizard displays.
2. Select the **External Event** radio button option.



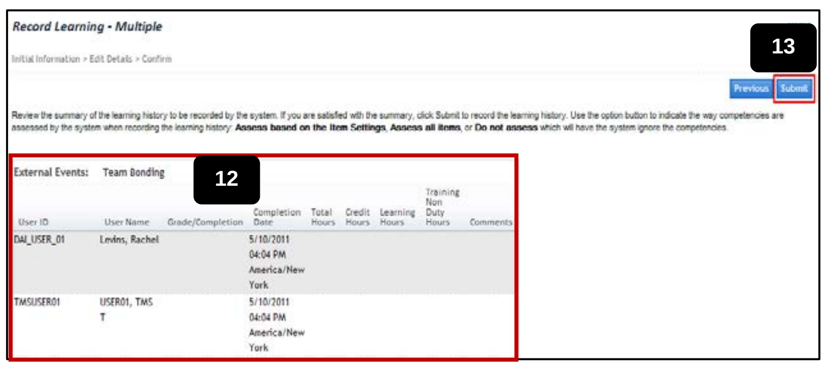
3. In the *Add External Events* section enter a description of the external event.
4. Click **Add**.
5. In the **Search & Add Users** section, enter a **User ID** exactly.
6. Click **Add** or click the **Search** icon to search for and select a user.
7. Click **Next**.



8. In the **Edit Details** section, enter details for the item for each user:
   - **Completion Date**
   - **Time**
   - **Time Zone**
   - **Grade** and **Completion Status**
   - **Total Hours**, **Credit Hours**, **Contact Hours**, and **CPE**
9. Click the **More Options** icon to enter instructor information and comments. **Click Apply Changes** to save and close the pop-up.
10. Click **Apply Changes** to make the changes apply to all users.
11. Click **Next**



12. Review learning event information.
13. Click **Submit.**

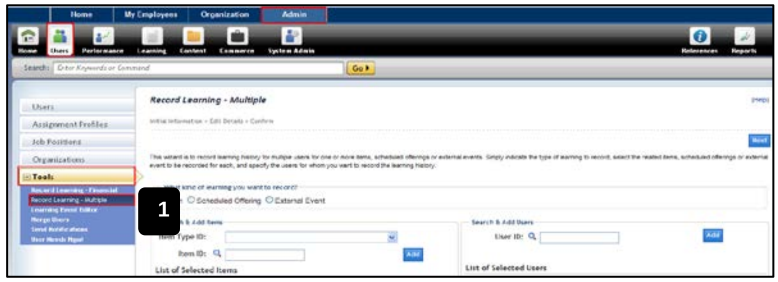


14. The application provides a status that the learning event has been recorded successfully.
15. Click **Start Over…** to begin the Record Learning – Financial process again. This retains all users previously selected.

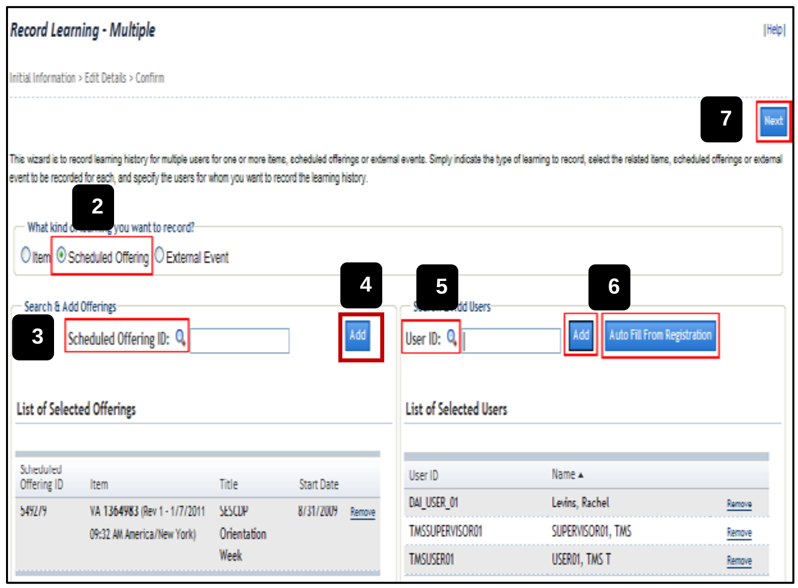
Task C. Record Completion of Scheduled Offering

Note: Verify that the **Admin** tab is selected.

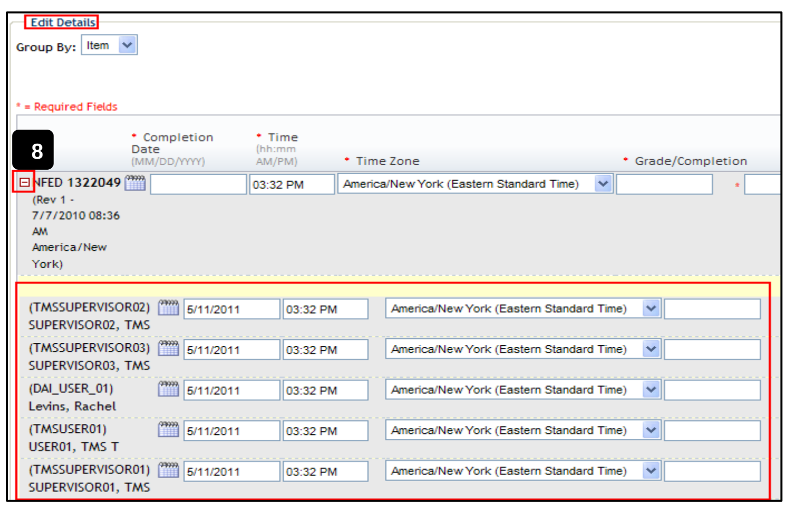
1. Navigate to **Users > Tools > Record Learning – Multiple** or enter **"Record Learning"** in the search box. The Recording Learning – Multiple wizard displays.



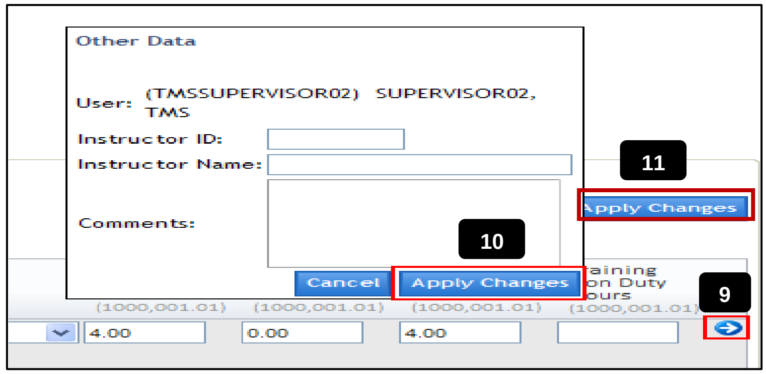
2. Select the **Scheduled Offering** radio button option.
3. In the **Search & Add Offerings** section, enter the **Schedule Offering ID** in the textbox exactly.
4. Click **Add** or click the **Search** icon to search for and select an item.
5. In the **Search and Add Users** section enter the **User ID** exactly.
6. Click **Add** or click the **Search** icon to search for and select an item or click **Auto Fill From Registration**.
7. Click **Next**.



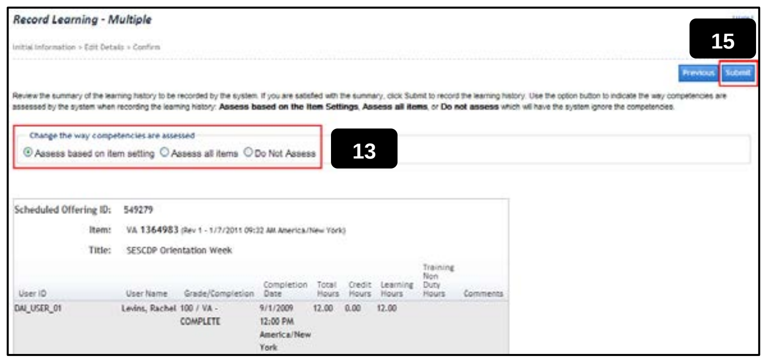
8. In the **Edit Details** section, enter details for the item for each user by clicking the **Expand** button:
   - **Completion Date** (for example, 04/01/2011)
   - **Time**
   - **Time Zone**
   - **Grade/Completion** status
   - Total hours, credit hours, contact hours, and CPE.



9. Scroll to the right to click the **More Options** arrow to enter instructor information and comments. The **Other Data** pop-up displays.
10. Click **Apply Changes** to apply instructor or comment changes. The **Other Data** pop-up closes.
11. Click **Apply Changes** to make the changes apply to all users
12. Click **Next**.



13. If competencies need to be assessed as a result of recording the learning event, select the appropriate checkbox.
14. Review learning event information.
15. Click **Submit.**

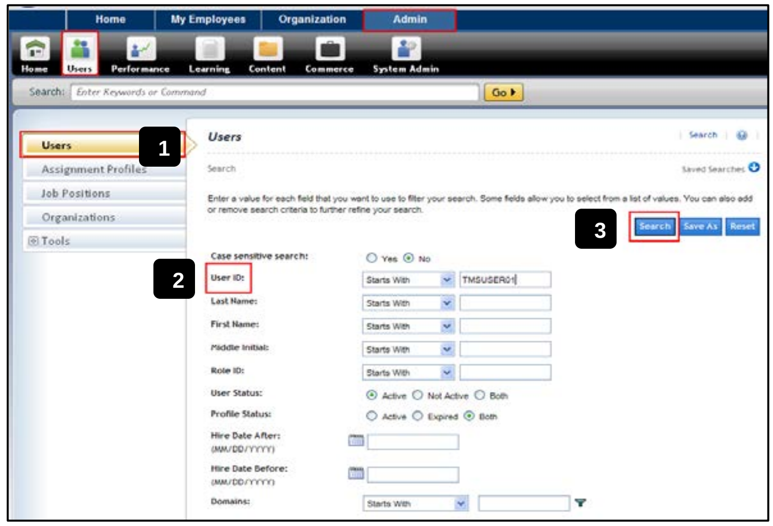


16. The application provides a status message to let you know that the learning event has been recorded successfully.
17. Click **Start Over…** to begin the Learning Event Recorder process again. This retains all users previously selected.

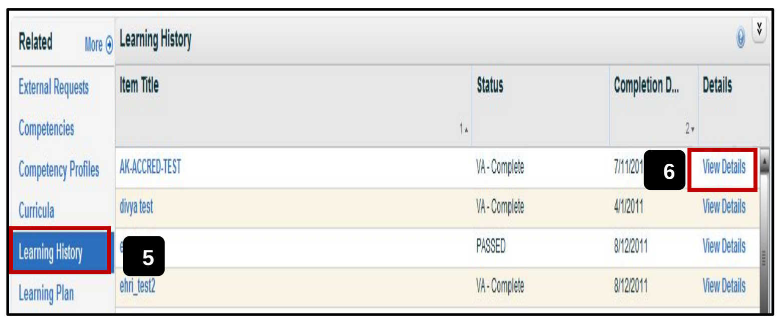
Task D. View User Learning History Tab

Note: Verify that the Admin tab is selected.

1. Navigate to **Users > Users**.
2. Enter search criteria to find one of the users for whom you just recorded a completion.
3. Click **Search**.
4. Click the **User Id** link in the search results to select the user record.



5. Click the **Learning History** tab under **Related**.
6. Click the **View Details** link for additional information on the learning event



7. .A separate pop-up window appears.

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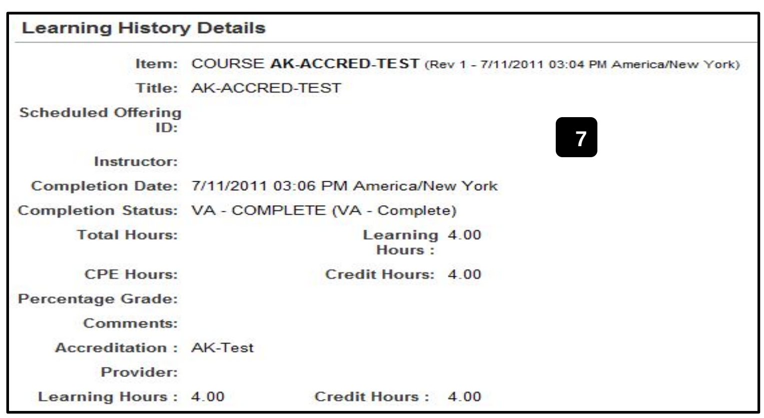
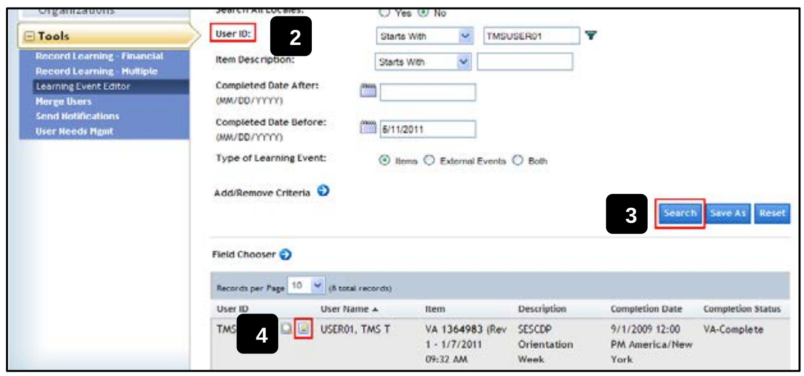


Task E. Edit Learning Event Using Leaning Event Editor

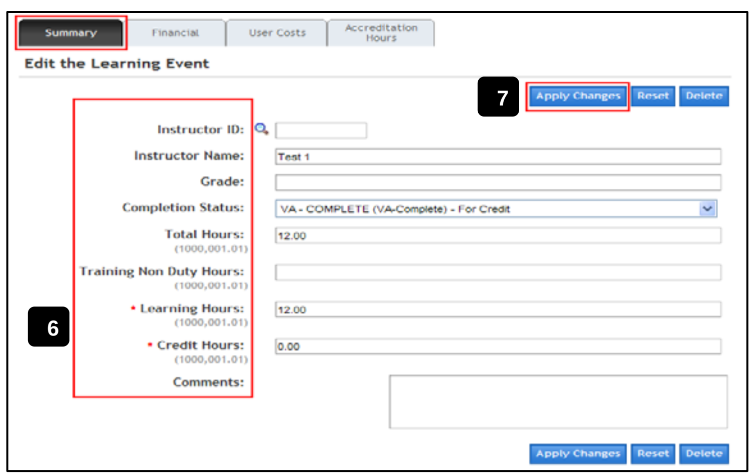
Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Tools > Learning Event Editor** or enter **"Learning Event Editor"** in the **Search** box located below the top menu bar.
2. Enter search criteria to find the learning event.

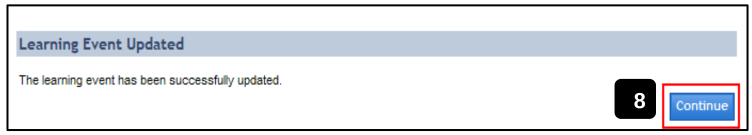
3. Click **Search**.
4. Click the **Edit** icon (magnifying glass) to select the learning event record.



5. Review the learning event details.
6. Enter **Learning Hours** and **Credit Hours**, if not populated. They are required fields. On the Summary tab, additional details such as the instructor, grade, completion status, completion date, and time can be edited.
7. Click **Apply Changes** to save any edits made to the learning event record.



8. Click **Continue.** Your changes have been applied**.** The Edit page with Summary tab is redisplayed.



9. Click the **Learning Event Editor** tab to edit another learning event.