

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 – Multiple to Record Completion of an Item
- Use Record Learning – Multiple to Record Attendance at External Event
- Use Record Learning – Multiple 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.

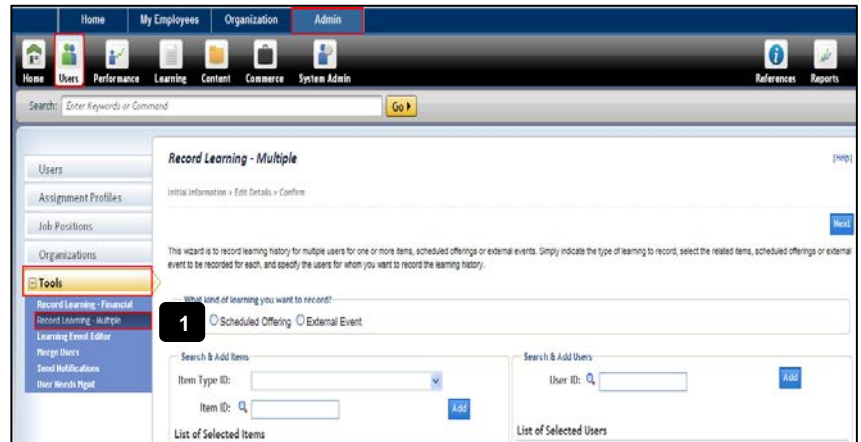
Types of Learning

- **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

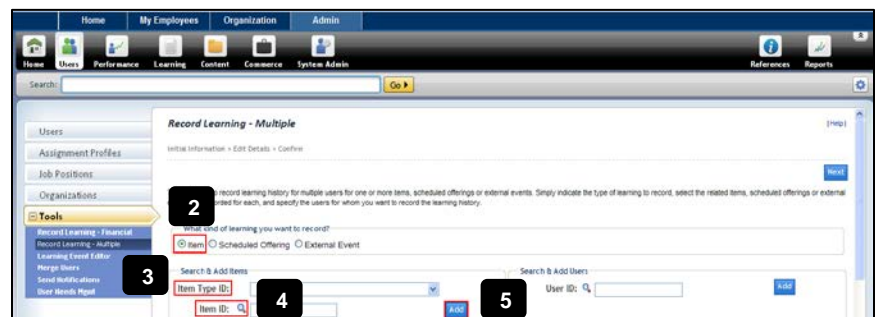
Note: Verify that the **Admin** tab is selected.

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



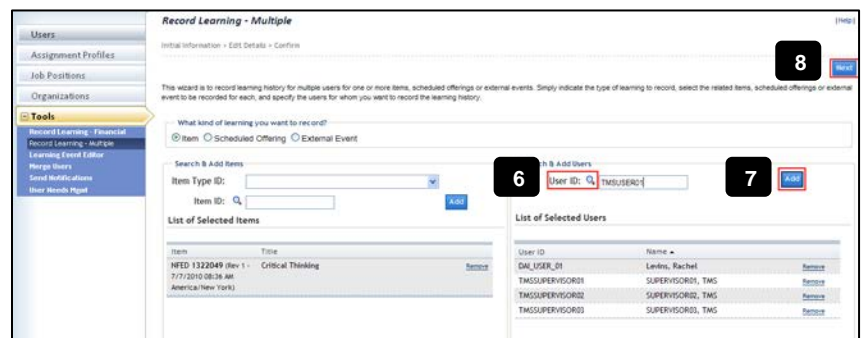
The screenshot shows the 'Record Learning - Multiple' wizard in the 'Admin' tab. The 'Tools' menu is expanded, and 'Record Learning - Multiple' is selected. The wizard title is 'Record Learning - Multiple'. Below the title, there is a section for 'What kind of learning you want to record?' with two radio buttons: 'Item' (selected) and 'External Event'. There are also search and add fields for 'Item Type ID', 'Item ID', and 'User ID'.

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**.



The screenshot shows the 'Record Learning - Multiple' wizard with step 2 highlighted. The 'Item' radio button is selected. In the 'Search & Add Items' section, the 'Item Type ID' dropdown menu is open, and an 'Item ID' has been entered in the adjacent text box. The 'Add' button is visible.

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**.



The screenshot shows the 'Record Learning - Multiple' wizard with step 3 highlighted. The 'User ID' field in the 'Search & Add Users' section contains the text 'TMSUSER01'. The 'Add' button is highlighted. Below the wizard, there are two tables: 'List of Selected Items' and 'List of Selected Users'.

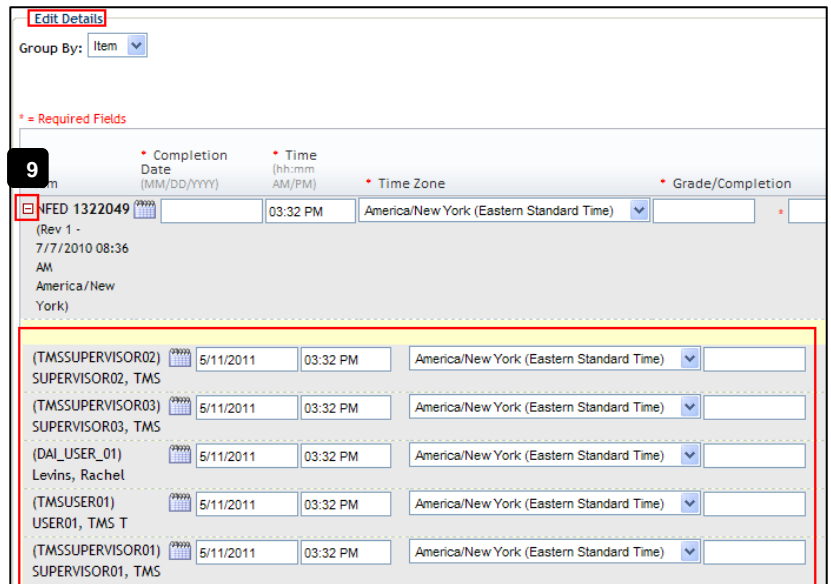
Item	Title	Remove
NFD 1322049 (Rev 1)	Critical Thinking	Remove
7/7/2010 08:38 AM		
America/New York		

User ID	Name	Remove
DAL_USER_01	Levins, Rachel	Remove
TMSUPERVISOR01	SUPERVISOR01, TMS	Remove
TMSUPERVISOR02	SUPERVISOR02, TMS	Remove
TMSUPERVISOR03	SUPERVISOR03, TMS	Remove

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

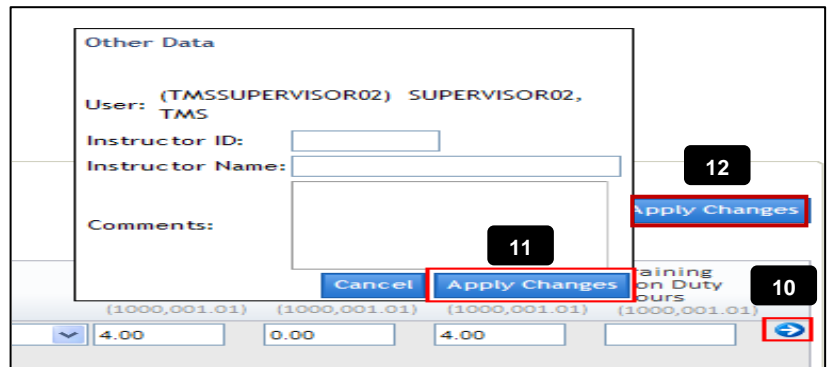
10. Scroll to the right to click the **More Options** arrow to enter instructor information and comments. The Other Data pop-up displays.



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

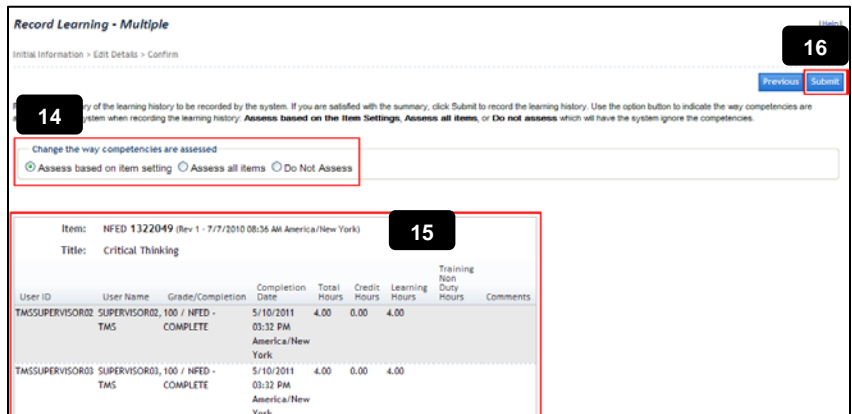
13. Click **Next**.



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**.



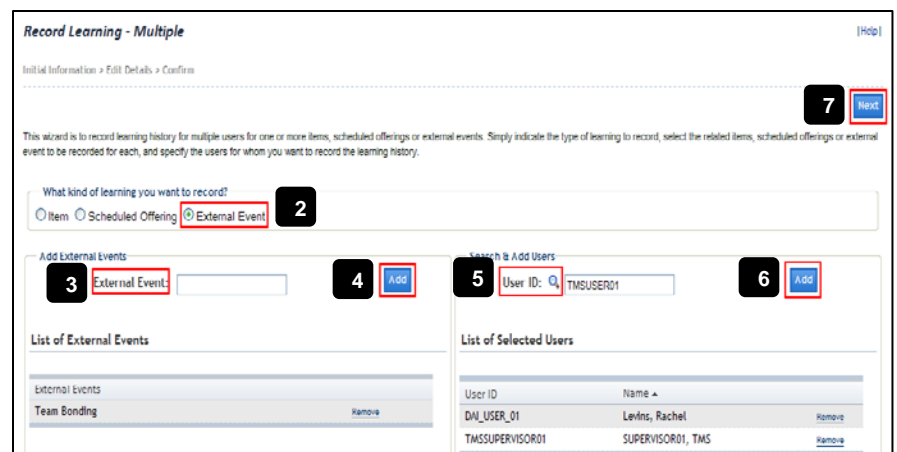
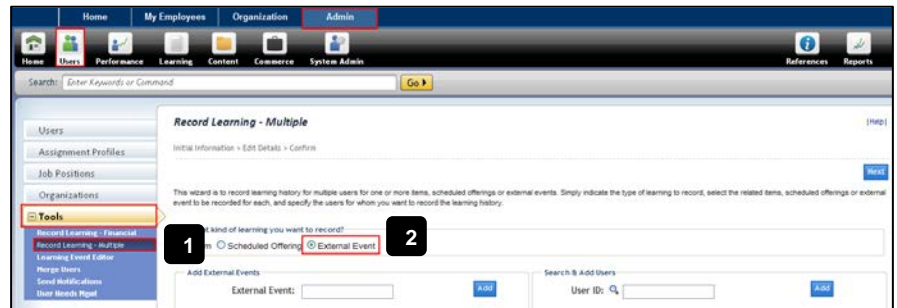
- The application provides a status message to let you know that the learning event has been recorded successfully.
- Click **Start Over...** to begin the Learning Event Recorder process again. This retains all users previously selected.



Task B. Record Attendance at External Event

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

- Navigate to **Users > Tools > Record Learning – Multiple** or enter **Record Learning** in the Search box. The *Recording Learning – Multiple* wizard displays.
- Select the **External Event** radio button option.
- In the *Add External Events* section enter a description of the external event.
- Click **Add**.
- In the **Search & Add Users** section, enter a **User ID** exactly.
- Click **Add** or click the **Search** icon to search for and select a user.
- 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**

Review and update the selections you made on the previous page. You may change details (such as **Credits** or **Completion Status**) for any specific record, or change the details for a group of records.

11 Previous Next

10 Apply Changes

8

9

9

Apply Changes

Cancel Apply Changes

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

Record Learning - Multiple

Initial Information > Edit Details > Confirm

13 Previous Submit

Review the summary of the learning history to be recorded by the system. If you are satisfied with the summary, click Submit to record the learning history. Use the option button to indicate the way competencies are assessed by the system when recording the learning history: **Assess based on the Item Settings**, **Assess all Items**, or **Do not assess** which will have the system ignore the competencies.

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User ID	User Name	Grade/Completion	Completion Date	Total Hours	Credit Hours	Learning Hours	Training Non Duty Hours	Comments
DAL_USER_01	Lewis, Rachel		5/10/2011 04:04 PM America/New York					
TMSUSER01	USER01, TMS T		5/10/2011 04:04 PM America/New York					

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.

Record Learning - Multiple

Initial Information > Edit Details > Confirm > Success

14 The Learning events were recorded successfully.

15 Start Over...

Users

Assignment Profiles

Job Positions

Organizations

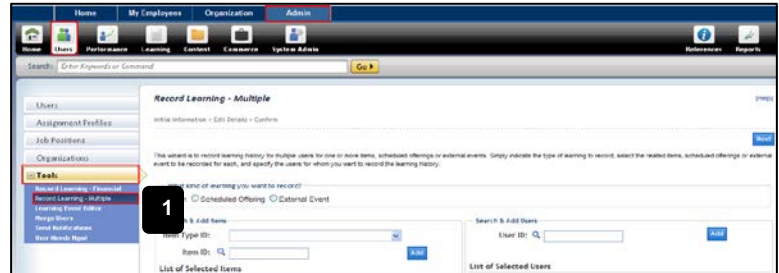
Tools

- Record Learning - Financial
- Record Learning - Multiple
- Learning Event Editor
- Merge Users
- Send Notifications
- User Needs Mgmt

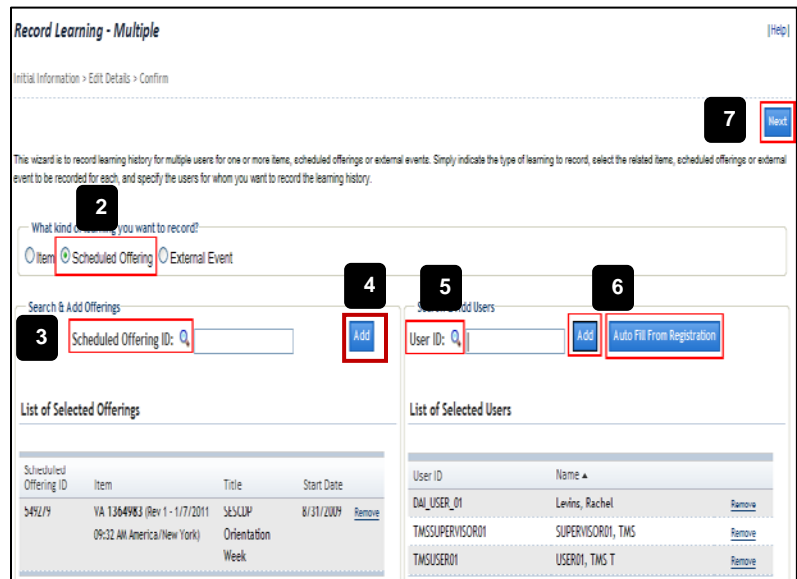
Task C. Record Completion of Scheduled Offering

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.



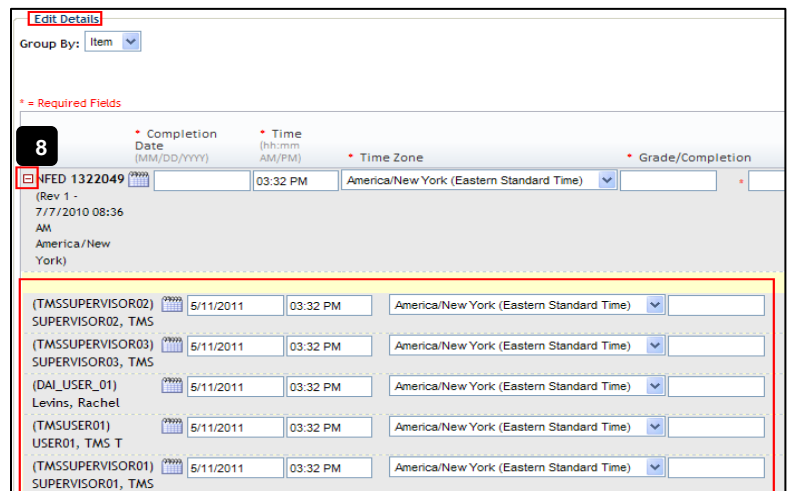
2. Select the **Scheduled Offering** radio button option.
3. In the **Search & Add Offerings** section, enter the **Schedule Offering ID** in the textbox exactly.
4. Click **Add** or click the **Search** icon to search for and select an item.
5. In the **Search and Add Users** section enter the **User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



Scheduled Offering ID	Item	Title	Start Date	
5492/19	VA 1364W83 (Rev 1 - 1/7/2011)	SEXCLIP	8/31/2009	Remove
	09:32 AM America/New York	Orientation		
		Week		

User ID	Name	
DAI_USER_01	Levins, Rachel	Remove
TMSSUPERVISOR01	SUPERVISOR01, TMS	Remove
TMSUSER01	USER01, TMS T	Remove

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.



* = Required Fields	Completion Date (MM/DD/YYYY)	Time (hh:mm AM/PM)	Time Zone	Grade/Completion
<input type="checkbox"/>	NFED 1322049 (Rev 1 - 7/7/2010 08:36 AM America/New York)	03:32 PM	America/New York (Eastern Standard Time)	
<input type="checkbox"/>	(TMSUPERVISOR02) SUPERVISOR02, TMS	5/11/2011 03:32 PM	America/New York (Eastern Standard Time)	
<input type="checkbox"/>	(TMSUPERVISOR03) SUPERVISOR03, TMS	5/11/2011 03:32 PM	America/New York (Eastern Standard Time)	
<input type="checkbox"/>	(DAI_USER_01) Levins, Rachel	5/11/2011 03:32 PM	America/New York (Eastern Standard Time)	
<input type="checkbox"/>	(TMSUSER01) USER01, TMS T	5/11/2011 03:32 PM	America/New York (Eastern Standard Time)	
<input type="checkbox"/>	(TMSSUPERVISOR01) SUPERVISOR01, TMS	5/11/2011 03:32 PM	America/New York (Eastern Standard Time)	

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**.

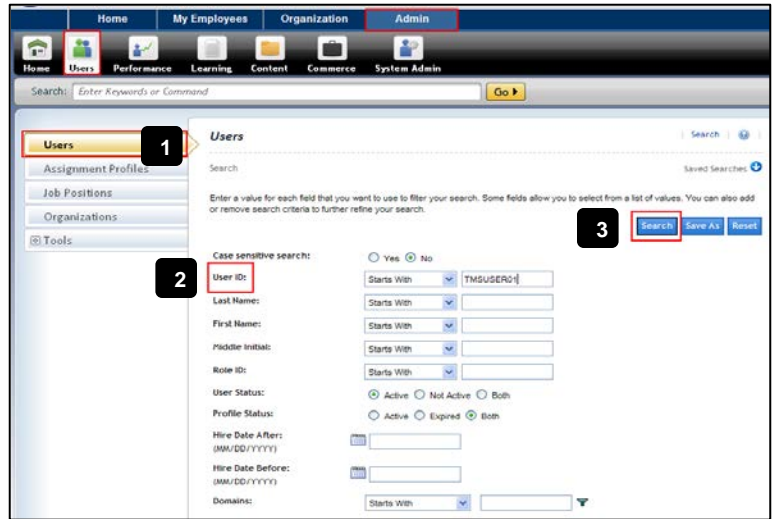
User ID	User Name	Grade/Completion	Completion Date	Total Hours	Credit Hours	Learning Hours	Training Non-Duty Hours	Comments
DAL_USER_01	Leides, Rachel	100 / VA - COMPLETE	9/1/2009 12:00 PM	12.00	0.00	12.00		America/New York

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

External Requests	Item Title	Status	Completion D...	Details
Competencies		1.	2.	
Competency Profiles	AK-ACCRED-TEST	VA - Complete	7/11/2011	6 View Details
Curricula	divya_test	VA - Complete	4/1/2011	View Details
Learning History				5 View Details
Learning Plan	ehri_test2	VA - Complete	8/12/2011	View Details

7. .A separate pop-up window appears.

Learning History Details

Item: COURSE AK-ACCRED-TEST (Rev 1 - 7/11/2011 03:04 PM America/New York)
 Title: AK-ACCRED-TEST

Scheduled Offering ID: **7**

Instructor:

Completion Date: 7/11/2011 03:06 PM America/New York
 Completion Status: VA - COMPLETE (VA - Complete)

Total Hours: Learning 4.00
 Hours :

CPE Hours: Credit Hours: 4.00

Percentage Grade:

Comments:

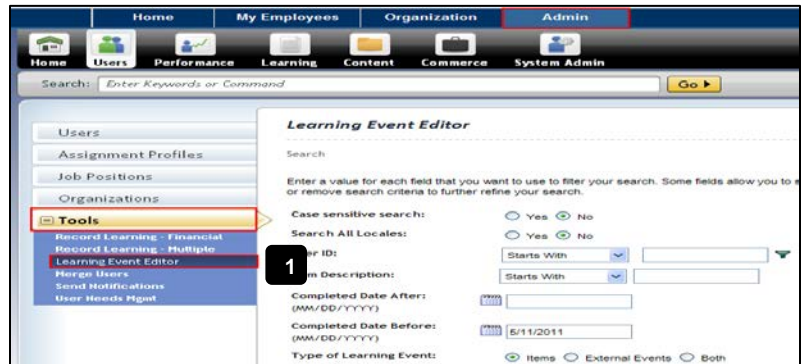
Accreditation : AK-Test
 Provider:

Learning Hours : 4.00 Credit Hours : 4.00

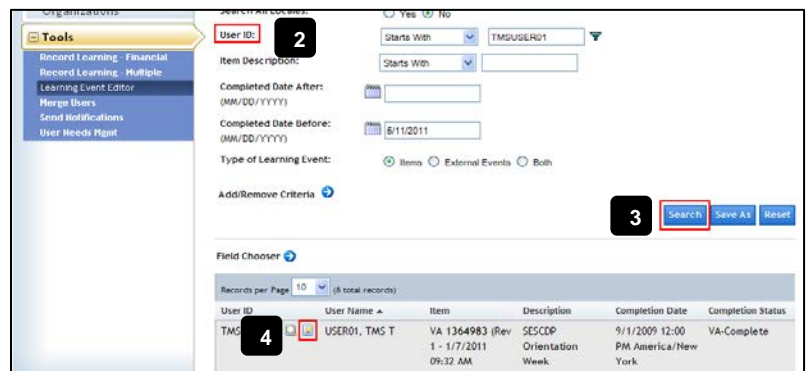
Task E. Edit Learning Event Using Learning Event Editor

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.

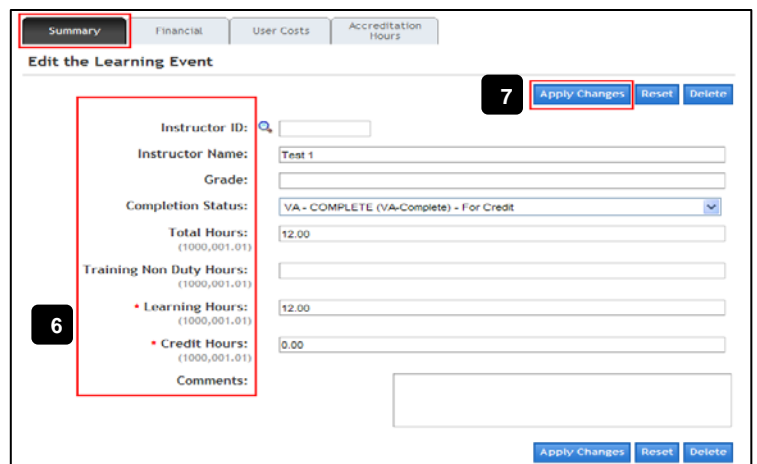


3. Click **Search**.
4. Click the **Edit** icon (magnifying glass) to select the learning event record.

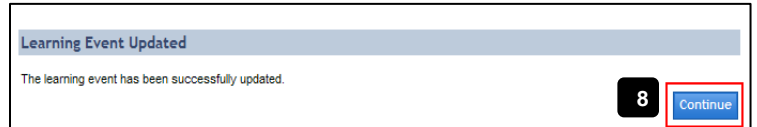


User ID	User Name	Item	Description	Completion Date	Completion Status
TMS	USER01, TMS T	VA 1364983 (Rev 1 - 1/7/2011)	SESCOP Orientation 09:32 AM Week York	9/1/2009 12:00 PM America/New York	VA-Complete

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.



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



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

