

Job Aid: Catalog Management

Purpose

The purpose of the Catalog Management job aid is to guide you through the step-by-step process of creating and editing catalogs, and associating them to items, curricula, and assignment profiles.

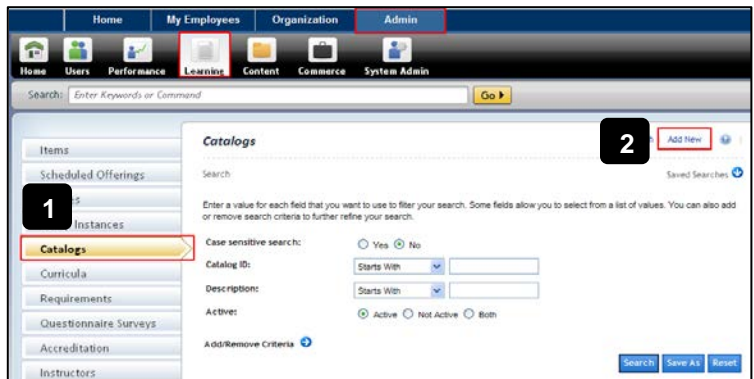
In this Job Aid, you will learn how to:

- Add Catalogs
- Associate Items to Catalogs
- Associate Curricula to Catalogs
- Modify Item/Curriculum Catalog Flags
- Associate a Catalog to an Assignment Profile

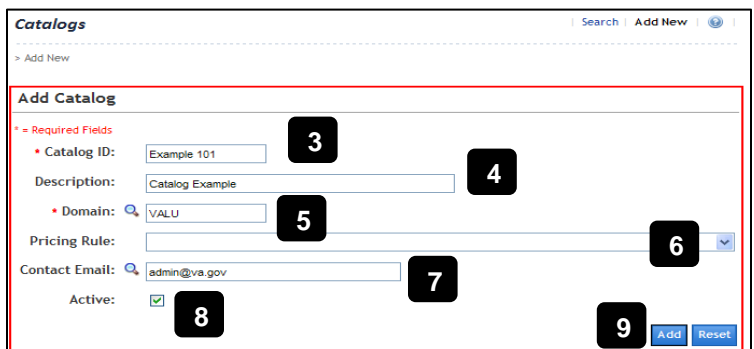
Task A. Add Catalogs

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

1. Navigate to **Learning > Catalogs**.
2. Click **Add New**.



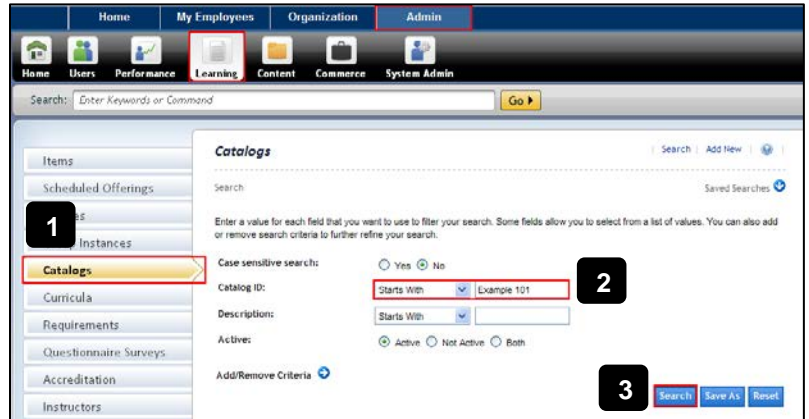
3. Enter a **Catalog ID**.
4. Enter a **Description** of the catalog.
5. Select a **Domain**.
6. Select a **Pricing Rule** from the drop-down menu, if applicable.
7. Enter a **Contact Email** address.
8. Verify the **Active** checkbox is selected.
9. Click the **Add** button. The new catalog is successfully added.



Task B. Associate Items to Catalogs

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

1. Navigate to **Learning > Catalogs**.
2. Search for a catalog by entering criteria in one or more search fields.
3. Click the **Search** button.



4. Select the catalog by clicking the **Catalog ID**.

| Catalog ID | Description |
|------------|-----------------|
| Example101 | Catalog Example |

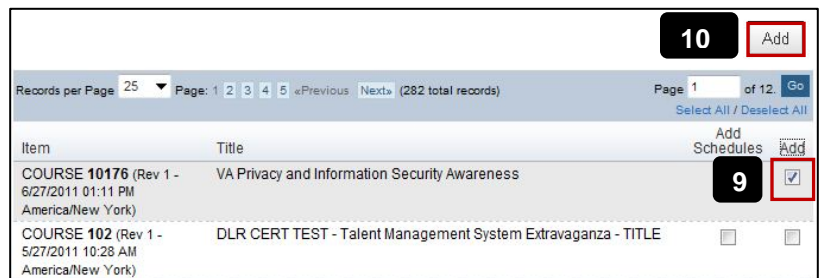
5. Select the **Items** tab under Related, if necessary.
6. Click the Add Items icon (green plus sign) to the right of **Items**.



7. Enter a value in the Keyword field.
Note: To expand your search options, click the Add/Remove Criteria icon (blue arrow).
8. Click the **Search** button.



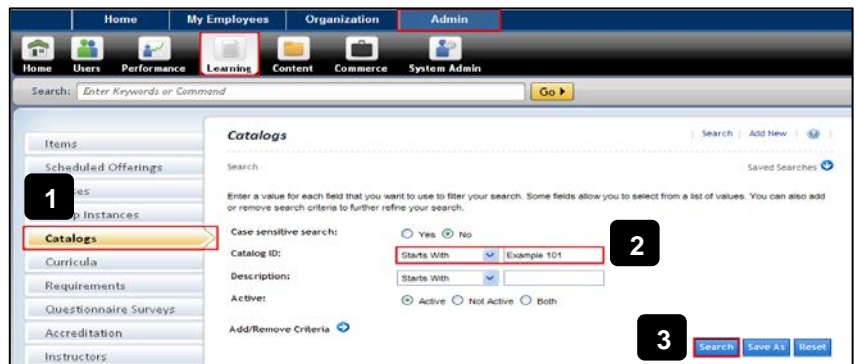
9. Click the checkbox under the **Add** column to select one or more items.
10. Click the **Add** button to complete the selection and close the search. The item is successfully associated to the catalog.



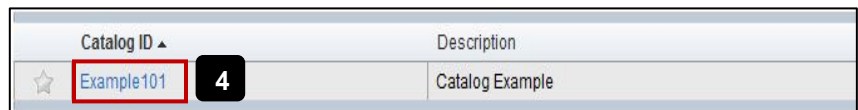
Task C. Associate Curricula to Catalogs

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

1. Navigate to **Learning > Catalogs**.
2. Search for a **catalog** by entering criteria in one or more search fields.
3. Click the **Search** button.



4. Select the catalog by clicking the **Catalog ID**.



5. Select the **Curricula** tab.
6. Click the Add Curricula icon (green plus sign) to the right of **Curricula**.



- Enter a value in the Keyword field.
Note: To expand your search options, click the Add/Remove Criteria icon (blue arrow).
- Click the **Search** button.

Keyword: **7**

Add/Remove Criteria **8**

- Click the checkbox under the **Add** column to select one or more curricula.
- Click the **Add** button to complete the selection and close the search. The curricula is successfully associated to the catalog.

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Records per Page: 5 Page: 1 2 3 4 5 «Previous Next» (41 total records) Page 1 of 5. Go

Select All / Deselect All

| Curriculum | Title | Add Items | Add |
|-------------------|------------------------------------|-------------------------------------|--|
| 10176 | 10176 | <input type="checkbox"/> | <input type="checkbox"/> |
| 508TESTCURRICULA | VA All Employee Mandatory Training | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> 9 |
| 508TEST_CURRICULA | 508TEST_CURRICULA_TITLE | <input type="checkbox"/> | <input type="checkbox"/> |

Task D. Modify Item/Curriculum Catalog Flags

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

- Complete Steps 1-4 in Task C above to edit the catalog record.
- Select the **Items** tab to modify catalog options per item
OR

Select the **Curricula** tab to modify catalog options per curriculum.

Related Curricula

2

Assignment Profiles VA All Employee Mandatory Training Details Flag: Until: MM/DD/YYYY

- To modify catalog options, click the **Flag** drop-down box and select one of the displayed options.
- Enter an **Until** date (if desired).
- Enter a **Reason** (if desired).

3 **4**

Flag:

Reason: Expires:

5

- Complete the **Expires** field (if desired).
Note: Setting an expiration date may prevent access to items/curricula for some users once the date is reached.
- Click the **Save** button.

The screenshot shows the 'Catalog Options' form. The 'Expires' field is highlighted with a red box and a '6' callout. The 'Save' button is highlighted with a red box and a '7' callout.

Task E. Associate a Catalog to an Assignment Profile

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

- Complete Steps 1-4 in Task C above to edit the catalog record.
- Select the **Assignment Profiles** tab.
Note: Users access to catalogs is controlled by assignment profiles.
- Click the Add New Assignment Profile icon (green plus sign) to the right of **Assignment Profiles**.

The screenshot shows the 'Assignment Profiles' tab. The 'Add' icon (green plus sign) is highlighted with a red box and a '3' callout. The 'Assignment Profiles' tab is highlighted with a red box and a '2' callout.

- Enter a value in the Keyword field.
Note: To expand your search options, click the Add/Remove Criteria icon (blue arrow).
- Click the **Search** button.

The screenshot shows the search interface. The 'Keyword' field is highlighted with a red box and a '4' callout. The 'Search' button is highlighted with a red box and a '5' callout.

- Click the checkbox under the **Add** column to select an assignment profile.
- Click the **Add** button to complete the selection and close the search. The assignment profile is successfully associated to the catalog.

The screenshot shows the search results table. The 'Add' button is highlighted with a red box and a '7' callout. The checkbox under the 'Add' column is highlighted with a red box and a '6' callout.