Enterprise Learning Management (ELM 9.0)

Training Guide for Learning Administrators

Human Resource Management Services
12/18/2009

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ELM Learning Administrator

ELM Employee Self-Service

ELM Employee Self-Service

How to use the UPK:

Step 1: Click the expand button to open the course.
Step 2: Each course is broken down into lessons. Click the expand button to open a lesson.
Step 3: Within each lesson are topics. Click on the topic you want to open.
Step 4: Once you select your topic, select one of the playback modes to view.

Playback Modes:

See It mode - Enables you to learn by watching an animated demonstration of the steps for a task being performed in a simulated environment. All the required activities, such as moving the mouse and entering data, are completed automatically.

Try It mode - Enables a user to learn interactively in a simulated environment. The user is prompted for mouse clicks and/or keystrokes to complete the task.

Do It mode - Is used with the Live application. The UPK will hover in the lower right of the screen providing visual instructions. Written instructions will guide them step-by-step through the process.

Lesson 2: Enrolling in an Activity

2.1 Enrolling in an Activity

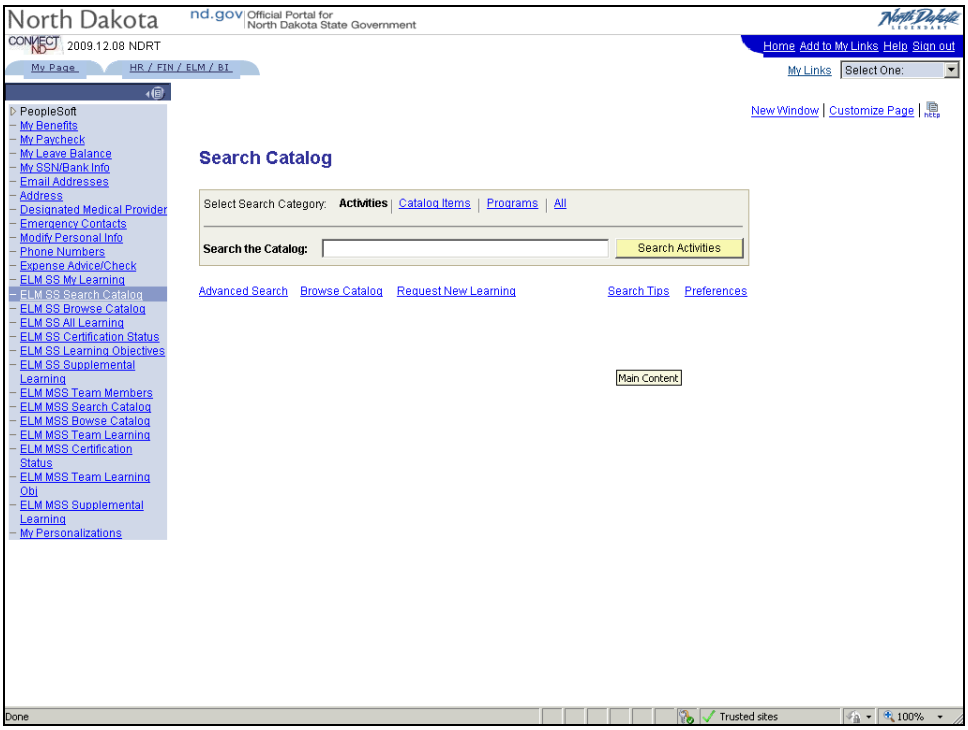
Learners have the ability to log into ELM self-service to enroll in activities. Security rights will determine what activities will be viewable when searching the catalog.

Procedure

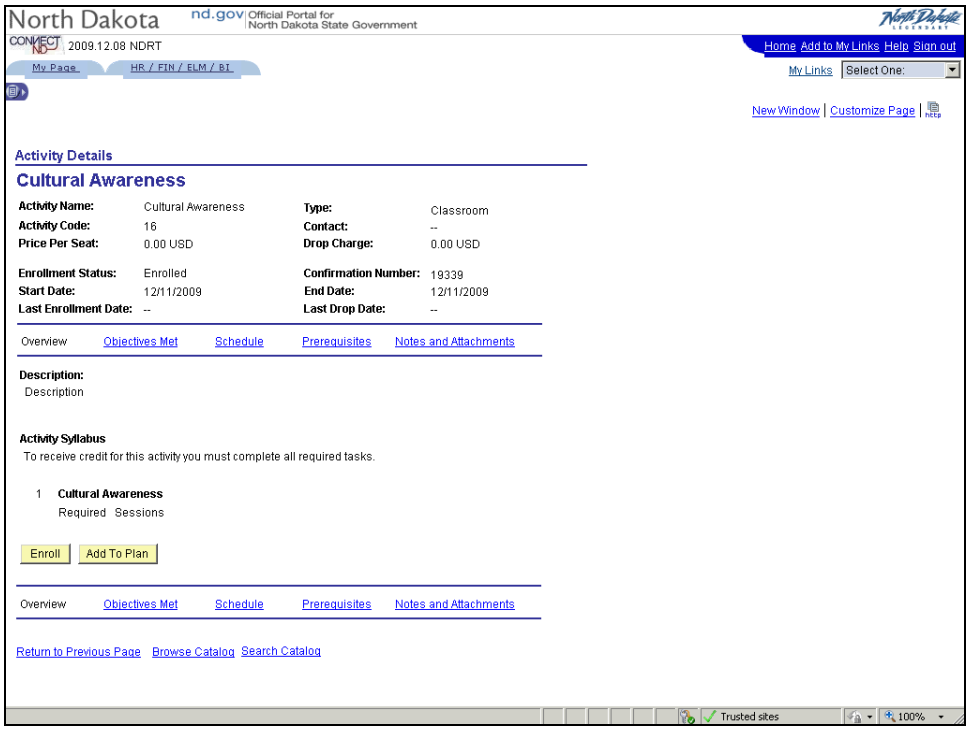
By the end of this topic, you will be able to:

- Navigate to the **Search Catalog** page.
- Enroll in an activity.

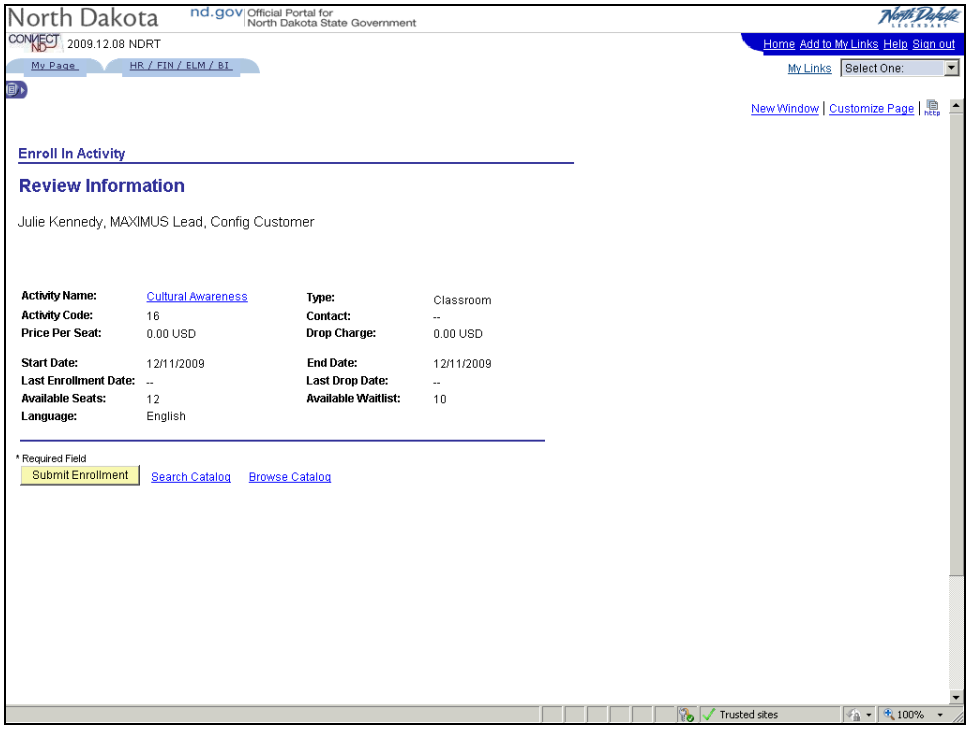
Step	Action
1.	Begin by navigating to the **Search Catalog** page. Click the **ELM SS Search Catalog** link. ELM SS Search Catalog



Step	Action
2.	Click the **Collapse Menu** button.
3.	The **Search Catalog** page is used to search for learning activities, catalog items and programs.
4.	Click in the **Search the Catalog** field.
5.	Enter the desired information into the **Search Activities** field. Enter "**Cultural Awareness**".
6.	Click the **Search Activities** button. Search Activities
7.	Notice all the activities entitled **Cultural Awareness** are returned.
8.	Click the **Cultural Awareness (HRMS2008)** link. Cultural Awareness (HRMS2008)



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



Step	Action
10.	Click the **Submit Enrollment** button. Submit Enrollment
11.	You have successfully enrolled in the activity: **Cultural Awareness**.
12.	**Congratulations**! You should now be able to: - Navigate to the **Search Catalog** page. - Enroll in an activity. **End of Procedure.**

2.2 Enrolling in an Activity with a Waitlist

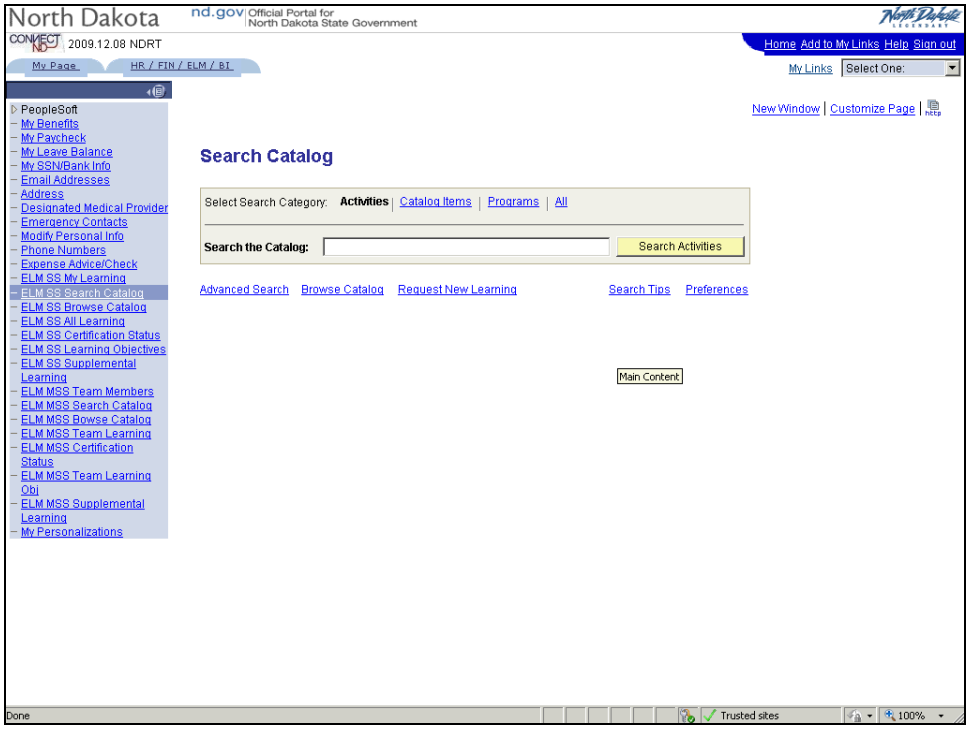
Activities can have a capacity limit. When the capacity limit is reached, the system can automatically create a waitlist. If an enrolled learner drops enrollment in the activity, the system automatically enrolls the first person on the waitlist.

Procedure

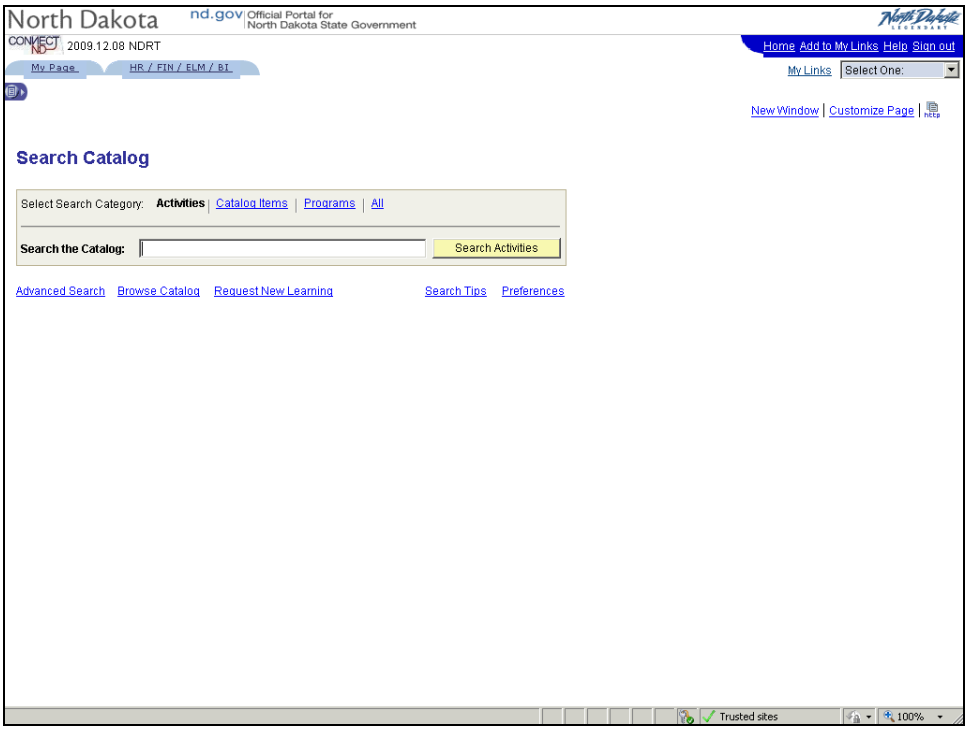
By the end of this topic, you will be able to:

- Navigate to the **Search Catalog** page.
- Enroll in an activity with a waitlist.

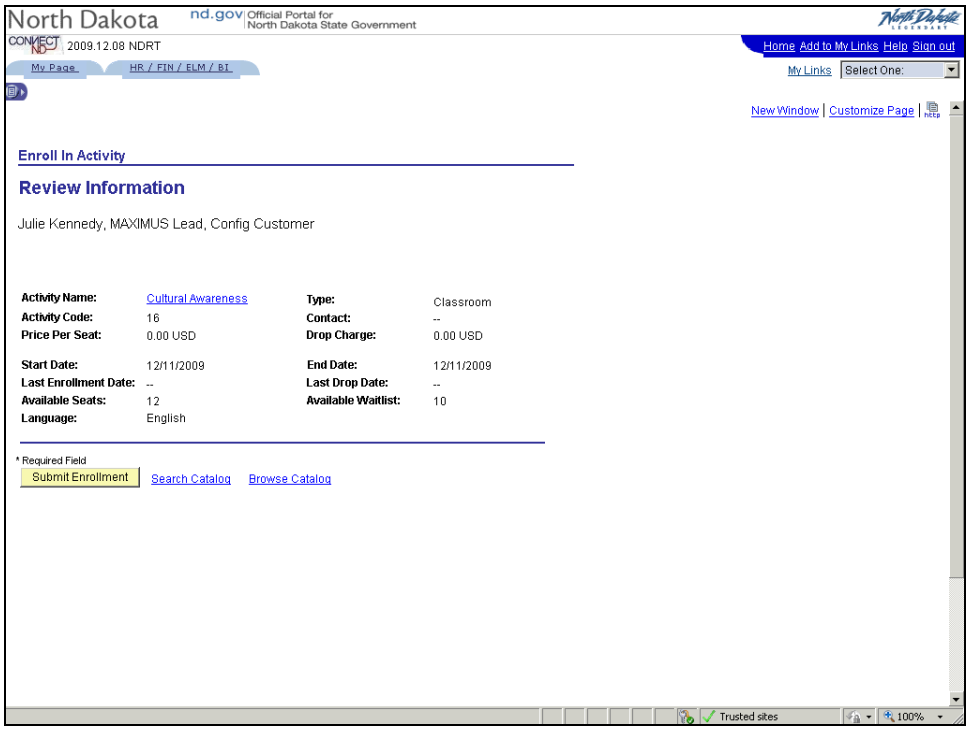
Step	Action
1.	Begin by navigating to the **Search Catalog** page. Click the **ELM SS Search Catalog** link. ELM SS Search Catalog



Step	Action
2.	Click the **Collapse Menu** button.
3.	The **Search Catalog** page is used to search for learning activities, catalog items and programs.



Step	Action
4.	Click in the **Search the Catalog** field.
5.	Enter the desired information into the **Search Activities** field. Enter "**Cultural Awareness**".
6.	Click the **Search Activities** button. Search Activities
7.	Click the **Enroll** link. Enroll



Step	Action
8.	Click the **Submit Enrollment** button. Submit Enrollment
9.	Notice Lee Lundberg has been successfully placed on the waitlist for the activity: **Cultural Awareness**.
10.	**Congratulations**! You should now be able to: - Navigate to the **Search Catalog** page. - Enroll in an activity with a waitlist. **End of Procedure.**

2.3 Viewing My Learning

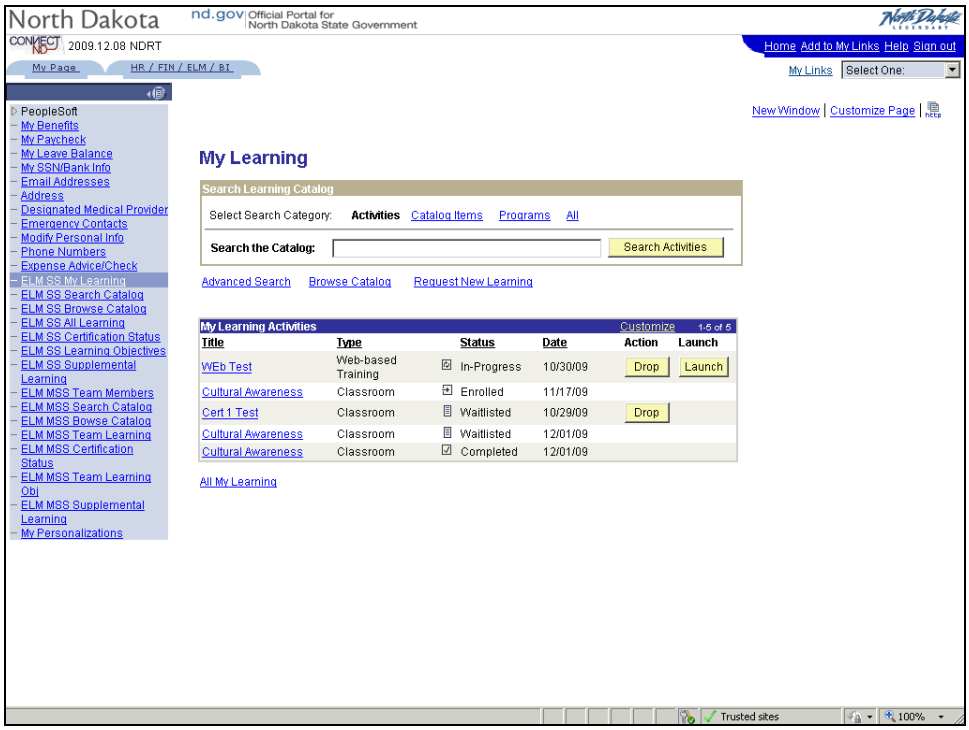
The **My Learning** page will allow learners to review their five most current activities and/or programs. Learners can also enroll in an activity, delete or drop an activity or program and modify supplemental learning from this page.

Procedure

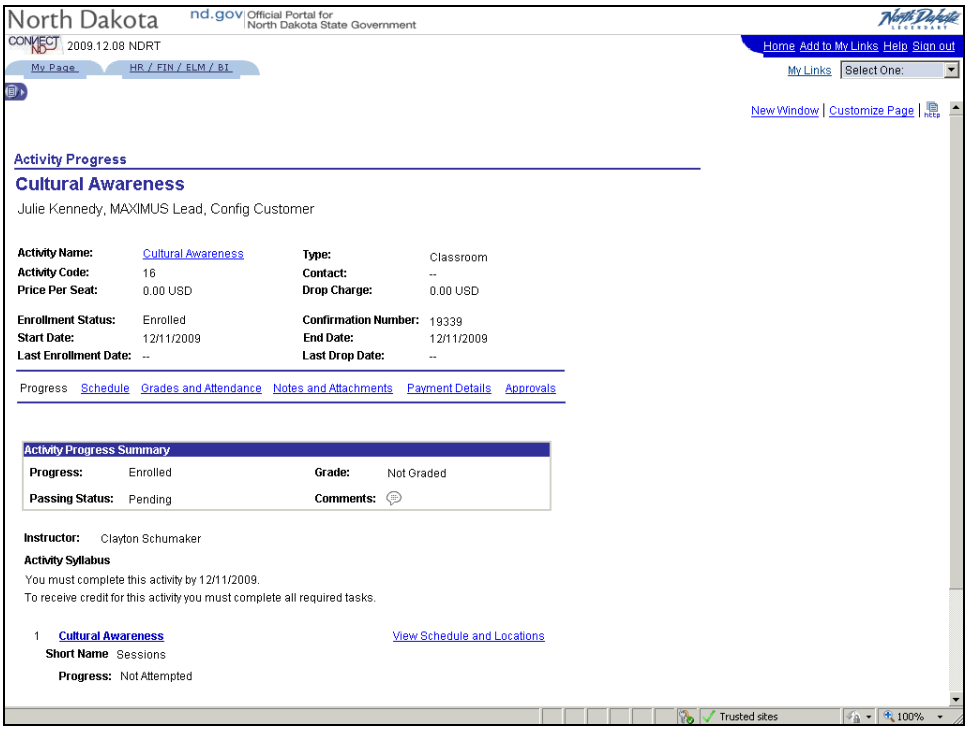
By the end of this topic, you will be able to:

- Navigate to the **My Learning** page.
- View your learning history.

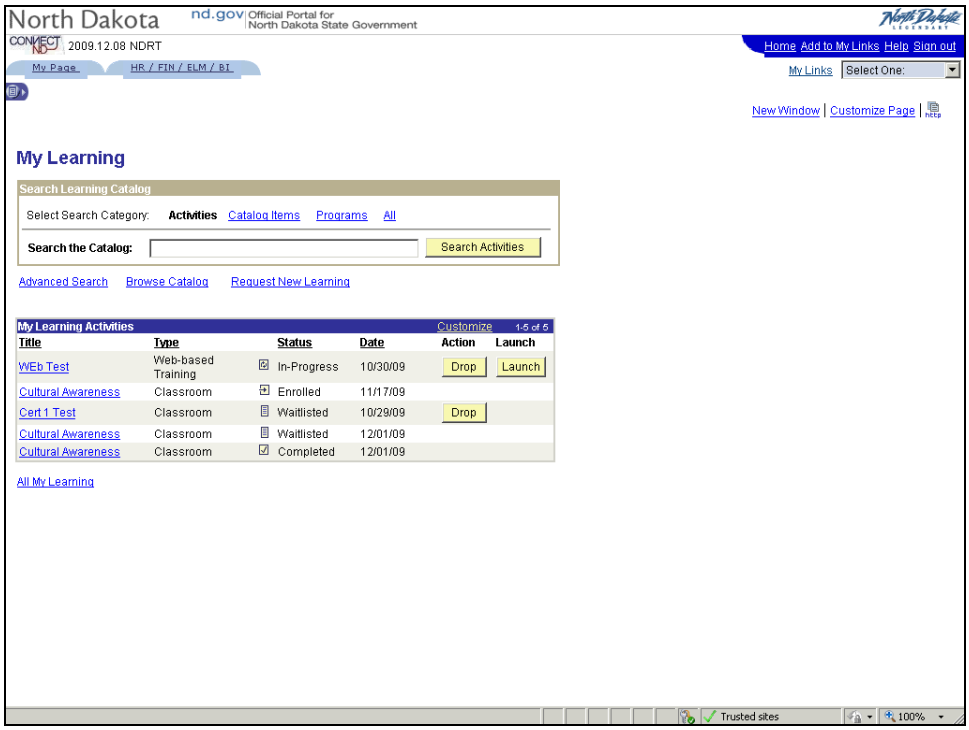
Step	Action
1.	Begin by navigating to the **My Learning** page. Click the **ELM SS My Learning** link. **ELM SS My Learning**



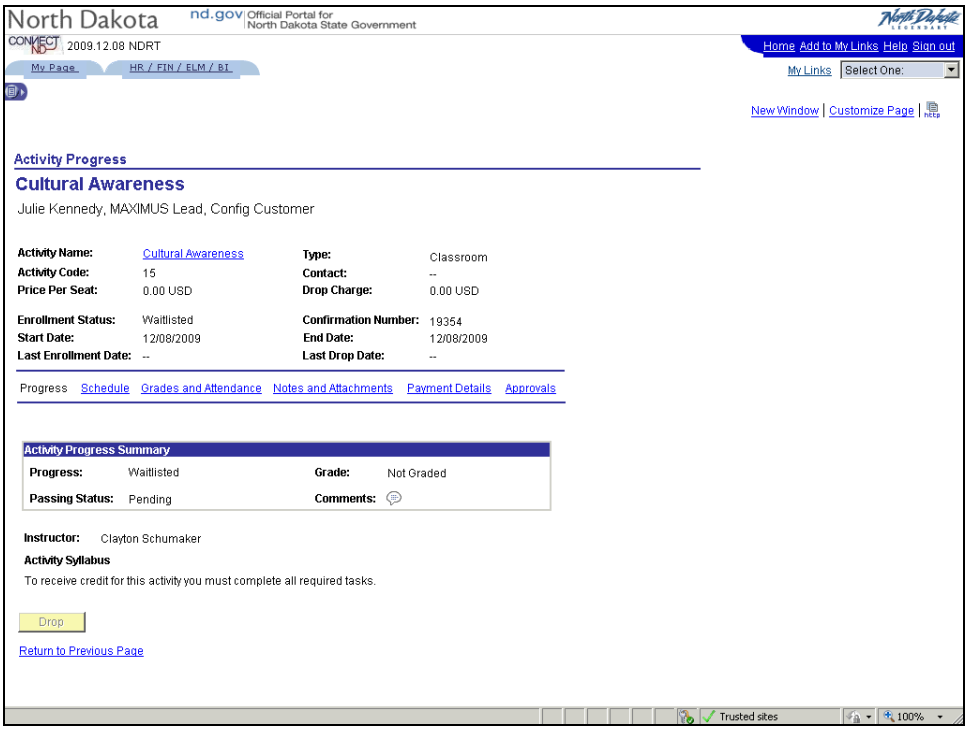
Step	Action
2.	Click the **Collapse Menu** button.
3.	The **My Learning** page displays all learning activities in which a learner is currently enrolled in, completed or has been waitlisted for.
4.	Click the "**Cultural Awareness**" link. Cultural Awareness
5.	The **Activity Progress** page displays detailed information about the selected Activity. In this example, you are able to view specific information for the Activity: **Cultural Awareness**.
6.	Notice Julie Kennedy is currently enrolled in the activity: **Cultural Awareness**.



Step	Action
7.	Click the scrollbar.
8.	Use the **View Schedule and Locations** link to view specific details about the activity (i.e., physical address, the date and time of the activity and the specific room number where the activity will be held).
9.	Click the **Return to Previous Page** link. Return to Previous Page



Step	Action
10.	Click the **Cultural Awareness** link. Cultural Awareness
11.	Notice this learner is also on the waitlist for the same Activity, but for a different day.



Step	Action
12.	Click the **Return to Previous Page** link. Return to Previous Page
13.	Users have the ability to drop enrollment or drop activities where they have been placed on the waitlist from the **My Learning** page.
14.	**Congratulations**! You should now be able to: - Navigate to the **My Learning** page. - View your learning history. **End of Procedure.**

2.4 Viewing All Learning

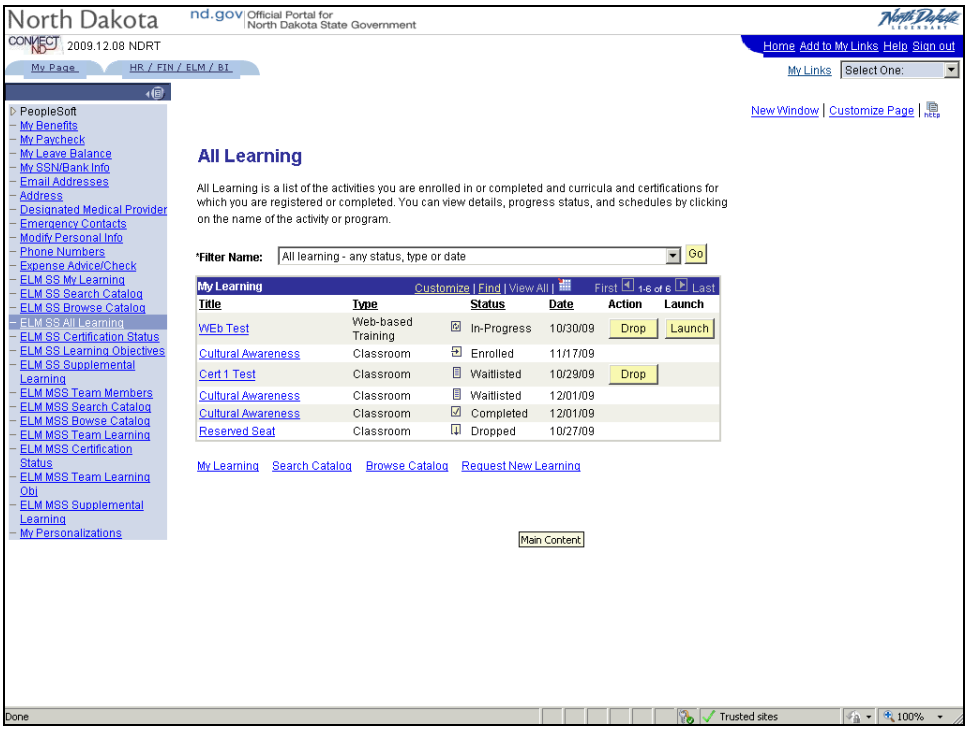
From the **All Learning** page, learners can view all learning activities they are scheduled for or planned as well as any activities they are currently enrolled in or that they have completed. Learners can also enroll, drop or modify learning from this page.

Procedure

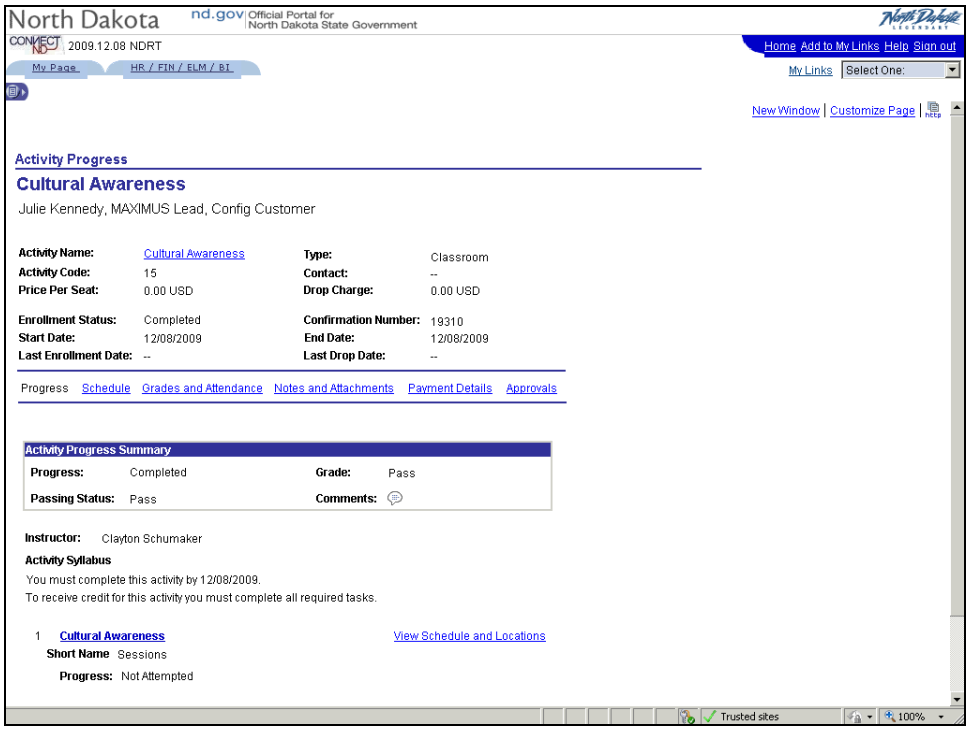
By the end of this topic, you will be able to:

- Navigate to the **All Learning** page.
- View a learners learning history.

Step	Action
1.	Begin by navigating to the **All Learning** page. Click the **ELM SS All Learning** link. **ELM SS All Learning**



Step	Action
2.	Click the **Collapse Menu** button.
3.	The **All Learning** page lists all the activities in which a learner has enrolled in, waitlisted for and/or completed.
4.	Use the **Filter Name** field to view different types of information pertaining to a users learning.
5.	Click the **Cultural Awareness** link. Cultural Awareness
6.	Lee Lundberg has completed and passed the activity: **How to Have Fun at Work**.



Step	Action
7.	Click the scrollbar.
8.	Click the **Return to Previous Page** link. Return to Previous Page
9.	Notice the different status' for each activity.
10.	**Congratulations**! You should now be able to: - Navigate to the **All Learning** page. - View a learners learning history. **End of Procedure.**

2.5 Dropping an Activity

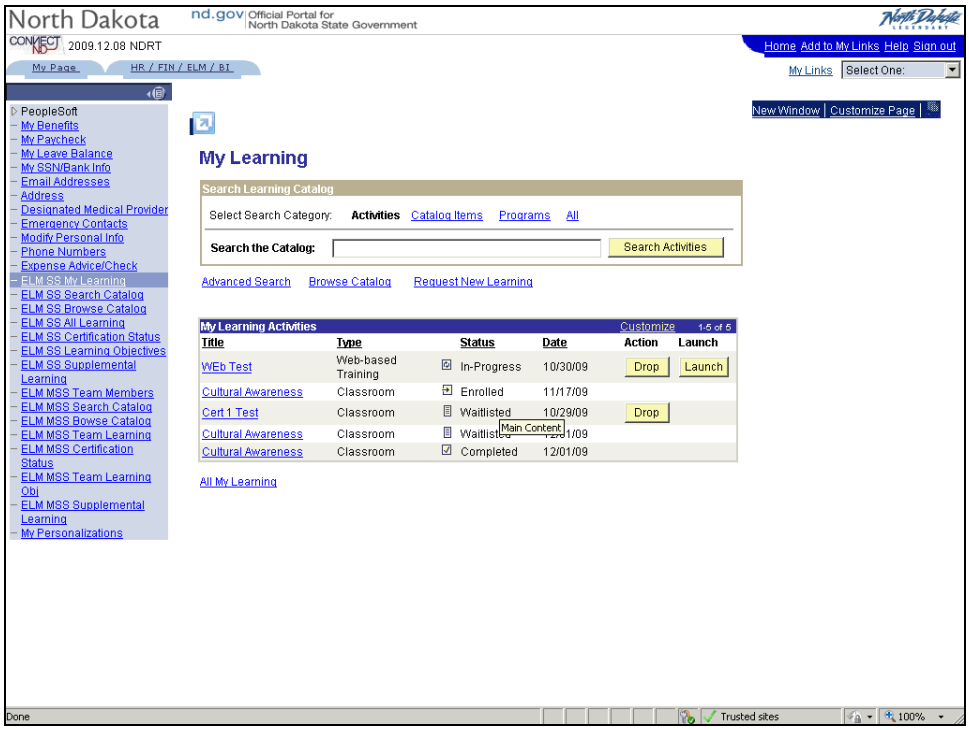
The **My Learning** page is used to drop an activity. From this page, learners can also view all activities they are currently enrolled in, wailtlisted for, completed and learning requests that are pending approval.

Procedure

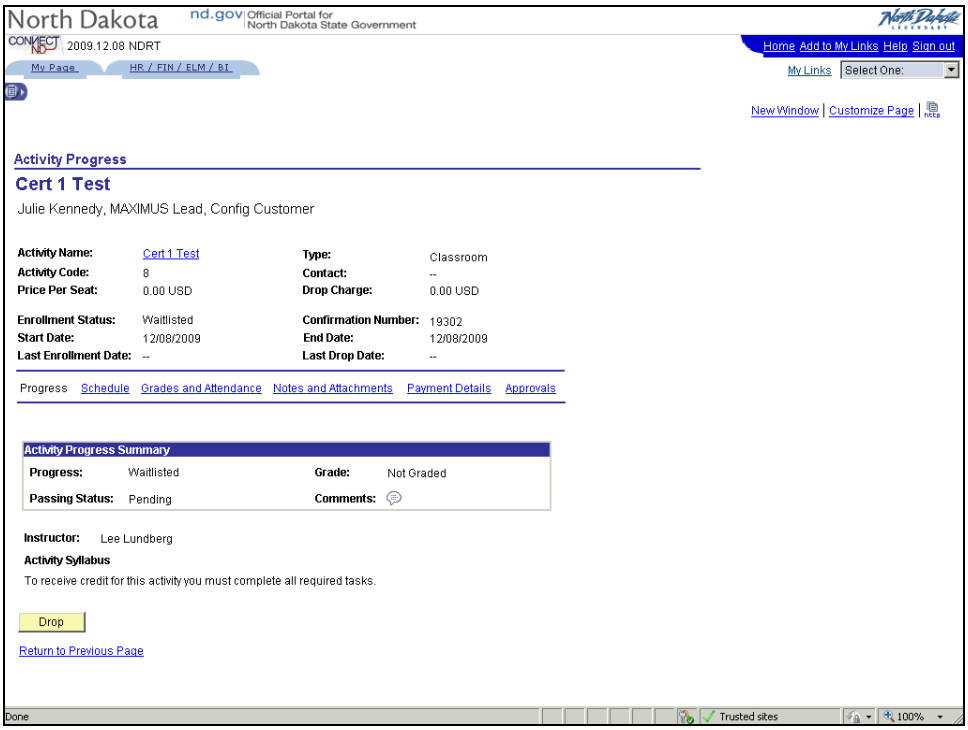
By the end of this topic, you will be able to:

- Navigate to the **My Learning** page.
- Drop an activity.

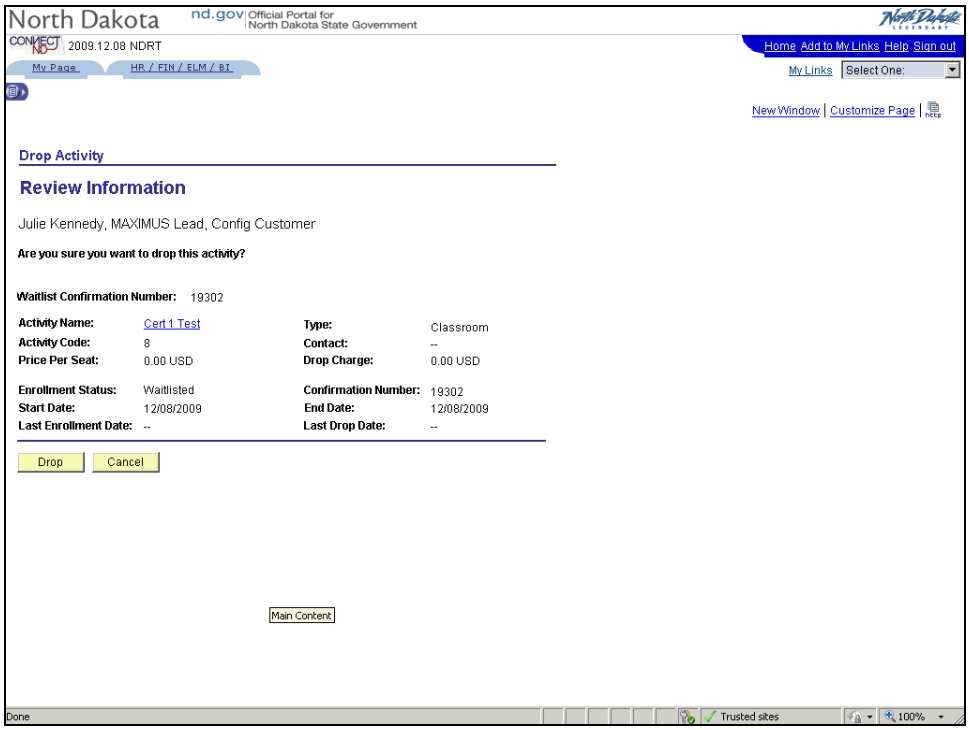
Step	Action
1.	Begin by navigating to the **My Learning** page. Click the **ELM SS My Learning** link. ELM SS My Learning



Step	Action
2.	Click the **Collapse Menu** button.
3.	The **My Learning** page is used to view a summary of your learning activities, certification status and objectives.
4.	Click the **Cert 1 Test** link. Cert 1 Test
5.	The **Activity Progress** page allows you to view the activity details prior to finalizing the drop action.
6.	Notice this learner is currently on the waitlist for this activity.



Step	Action
7.	Click the **Drop** button. Drop
8.	The **Review Information** page is where you verify one last that the selected activity is correct. You can also view whether drop charges will apply.



Step	Action
9.	Click the **Drop** button. Drop
10.	You have successfully been dropped from the activity: **Cert 1 Test** .
11.	**Congratulations**! You should now be able to: - Navigate to the **My Learning** page. - Drop an activity. **End of Procedure.**

2.6 Adding Supplemental Learning

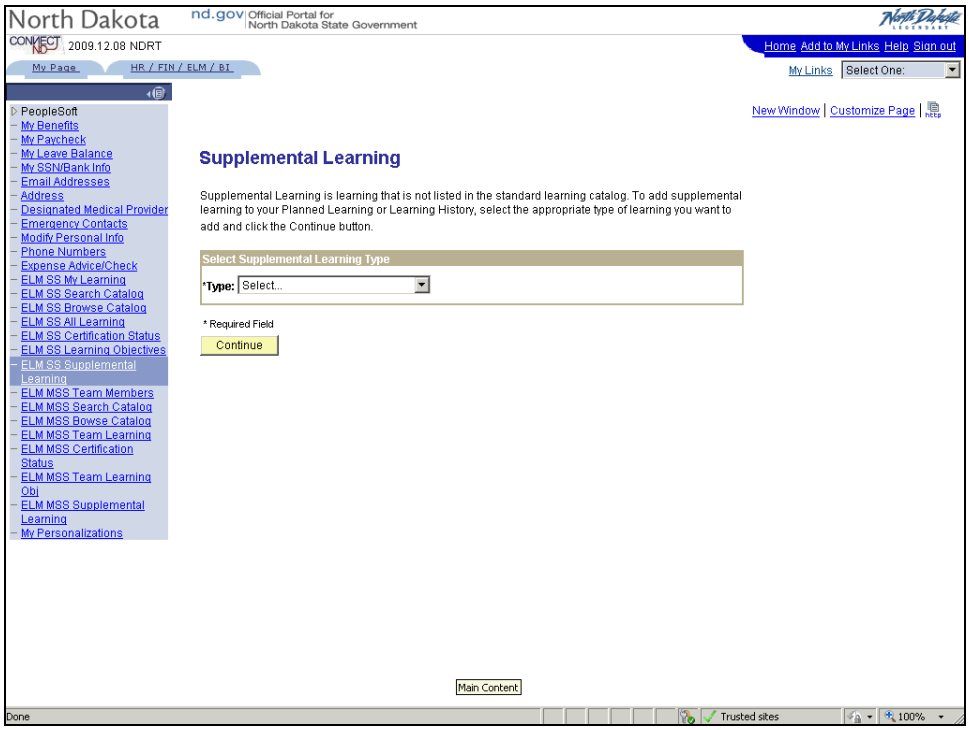
Learners can add supplemental learning to their training plan via self-service. Supplemental Learning is any learning that is not listed in the catalog.

Procedure

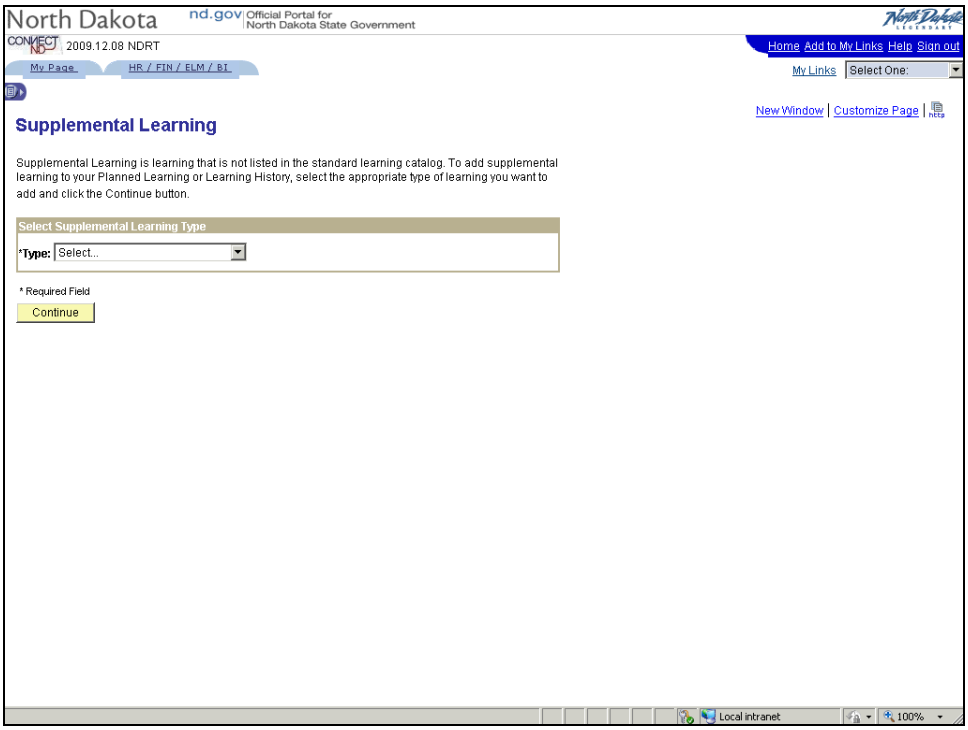
By the end of this topic, you will be able to:

- Navigate to the **Supplemental Learning** page.
- Add supplemental learning to a learners training plan.

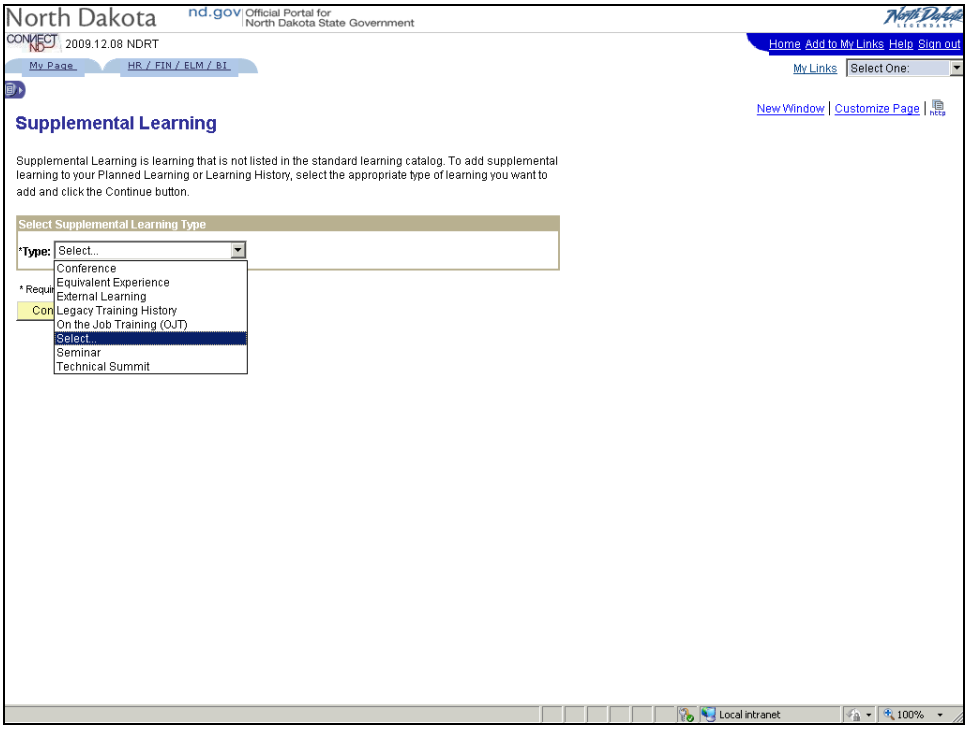
Step	Action
1.	Begin by navigating to the **Supplemental Learning** page. Click the **ELM SS Supplemental Learning** link. ELM SS Supplemental Learning



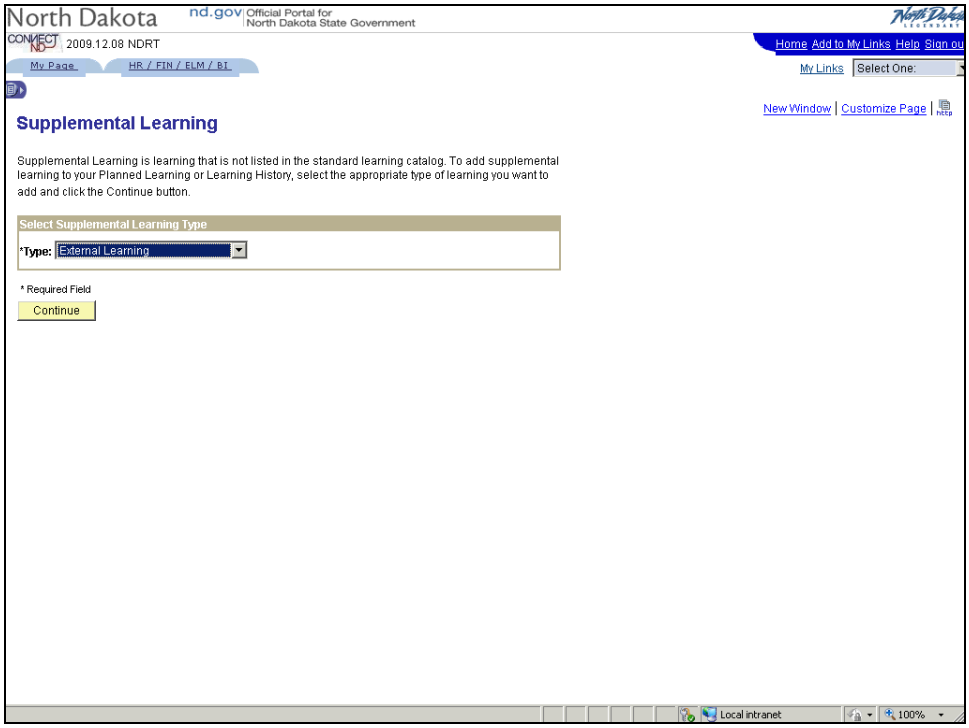
Step	Action
2.	Click the **Collapse Menu** button.
3.	**Note**: To enter education units for tracking purposes, the "**External Learning**" supplemental learning type must be selected from the drop-down list.



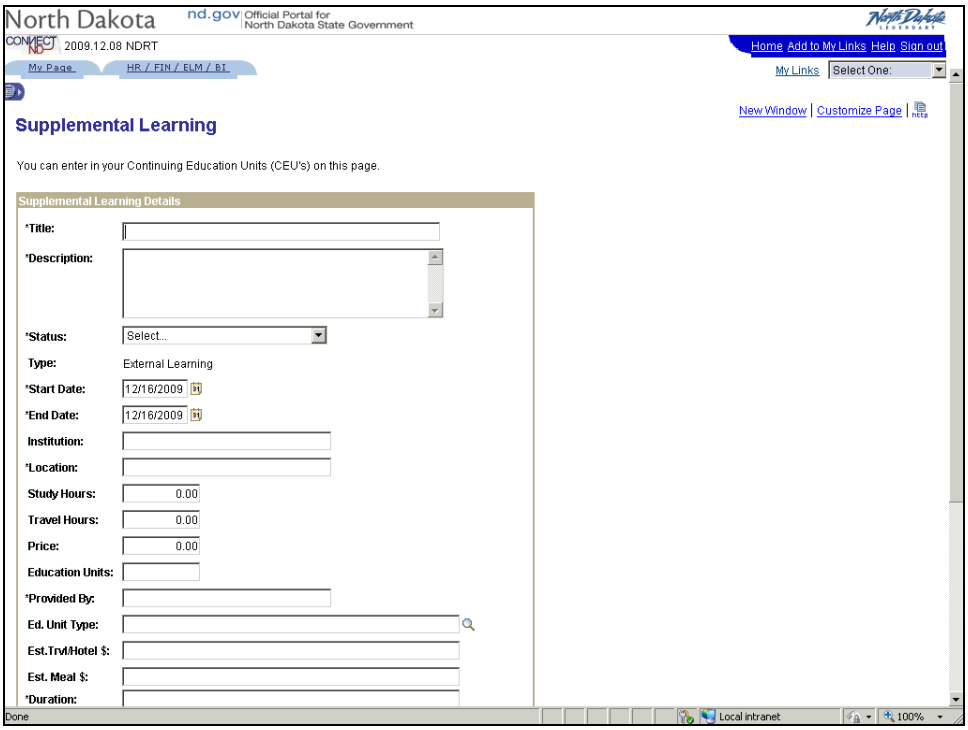
Step	Action
4.	Click the **Type** list.



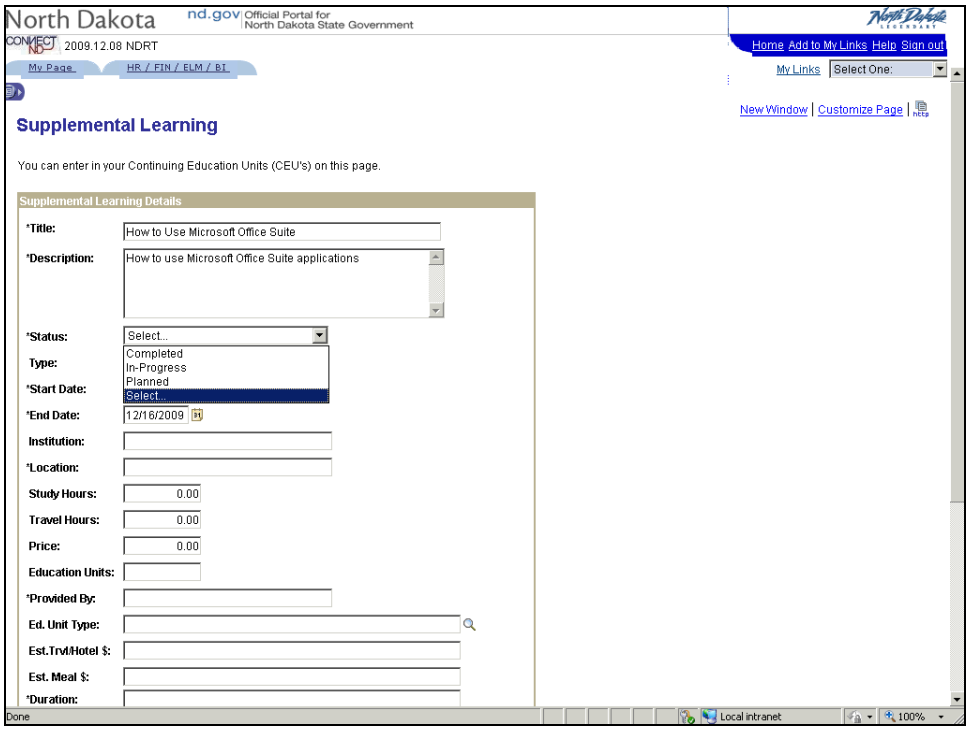
Step	Action
5.	Click the **External Learning** list item. External Learning



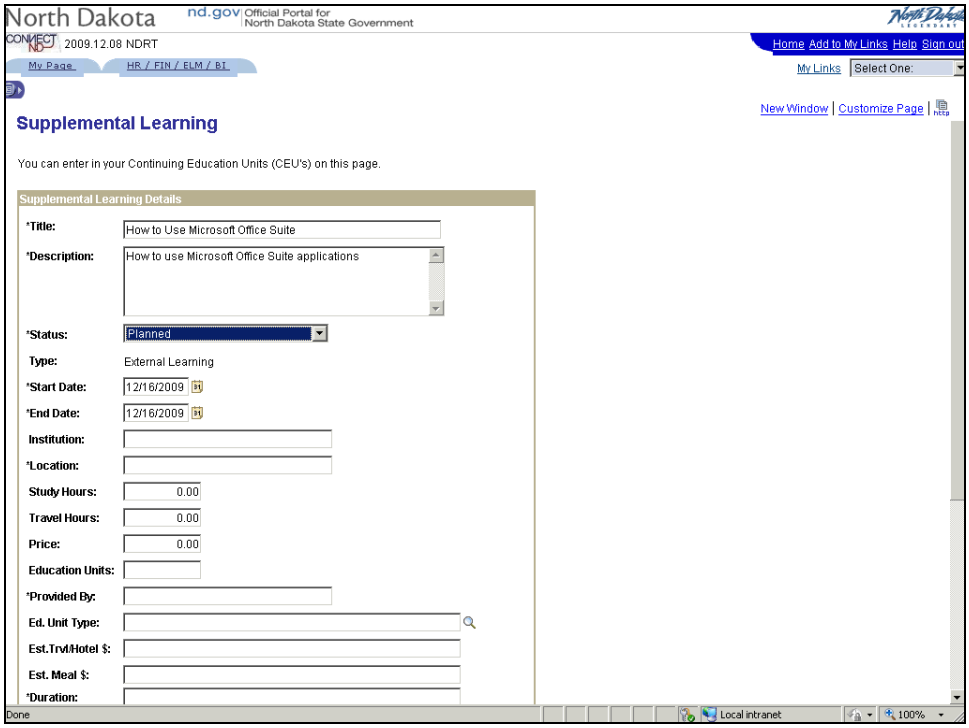
Step	Action
6.	Click the **Continue** button. Continue



Step	Action
7.	Enter the desired information into the **Title** field. Enter "**How to Use Microsoft Office Suite**".
8.	Click in the **Description** field.
9.	Enter the desired information into the **Description** field. Enter "**How to use Microsoft Office Suite applications**".
10.	Click the **Status** list.



Step	Action
11.	Click the **Planned** list item. Planned



Step	Action
12.	Click in the **Start Date** field. 12/16/2009
13.	Press **[Delete]**.
14.	Enter the desired information into the **Start Date** field. Enter "**12/21/2009**".
15.	Click in the **End Date** field. 12/16/2009
16.	Press **[Delete]**.
17.	Enter the desired information into the **End Date** field. Enter "**12/21/2009**".
18.	Click in the **Location** field.
19.	Enter the desired information into the **Location** field. Enter "**Bismarck, ND**".
20.	The **Education Units** field is used to enter the number of continuing education units that you want accredited to a learner on completion of this learning activity. **Note**: This value is for informational purposes only.
21.	Click in the **Education Units** field.
22.	Enter the desired information into the **Education Units** field. Enter "**60**".
23.	Click the scrollbar.
24.	Click in the **Provided By** field.
25.	Enter the desired information into the **Provided By** field. Enter "**The Learning Corporation**".
26.	Click the **Ed. Unit Type Lookup** button.
27.	Select the "**MEU**" list item. MEU
28.	Click in the **Duration** field.
29.	Enter the desired information into the **Duration** field. Enter "**6 Hours**".

Step	Action
30.	Click the **Save** button. Save
31.	The supplemental learning has been successfully added.
32.	**Congratulations**! You should now be able to: - Navigate to the **Supplemental Learning** page. - Add supplemental learning to a learners training plan. **End of Procedure.**

ELM Manager Self-Service

Lesson 2: Managing Learning Enrollment and Registration

2.1 Enrolling Team Members into an Activity

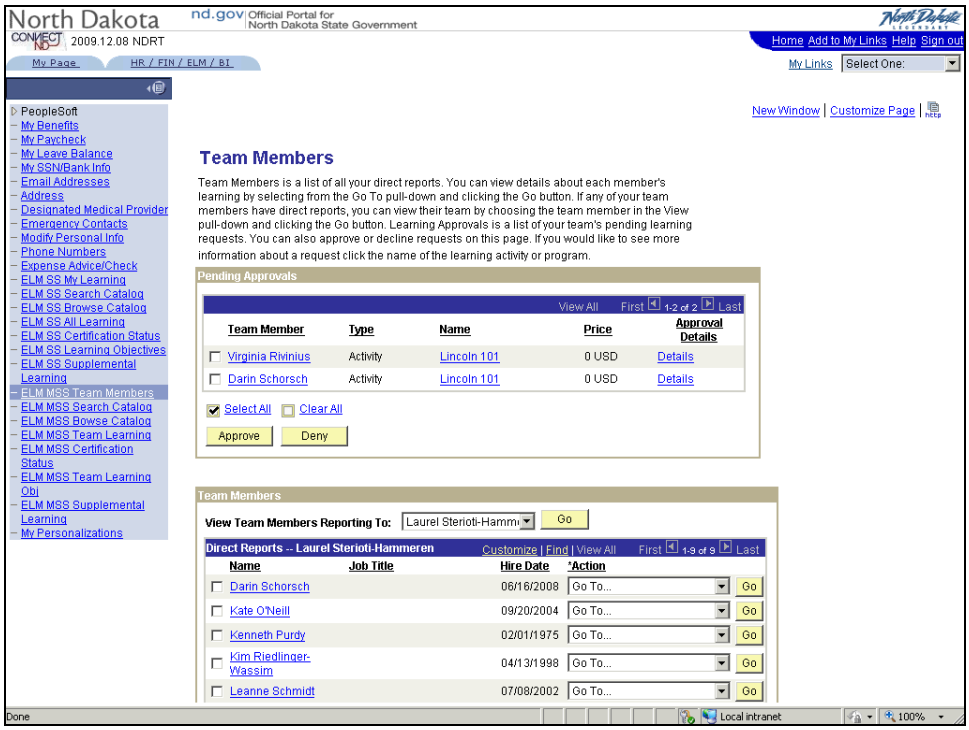
Managers have the ability to enroll their team members into training via Manager Self-Service. After opening the **Team Members** page, managers will be able to view all team members that have been assigned to them. From the **Team Members** page, managers can select specific team members to enroll in an activity.

Procedure

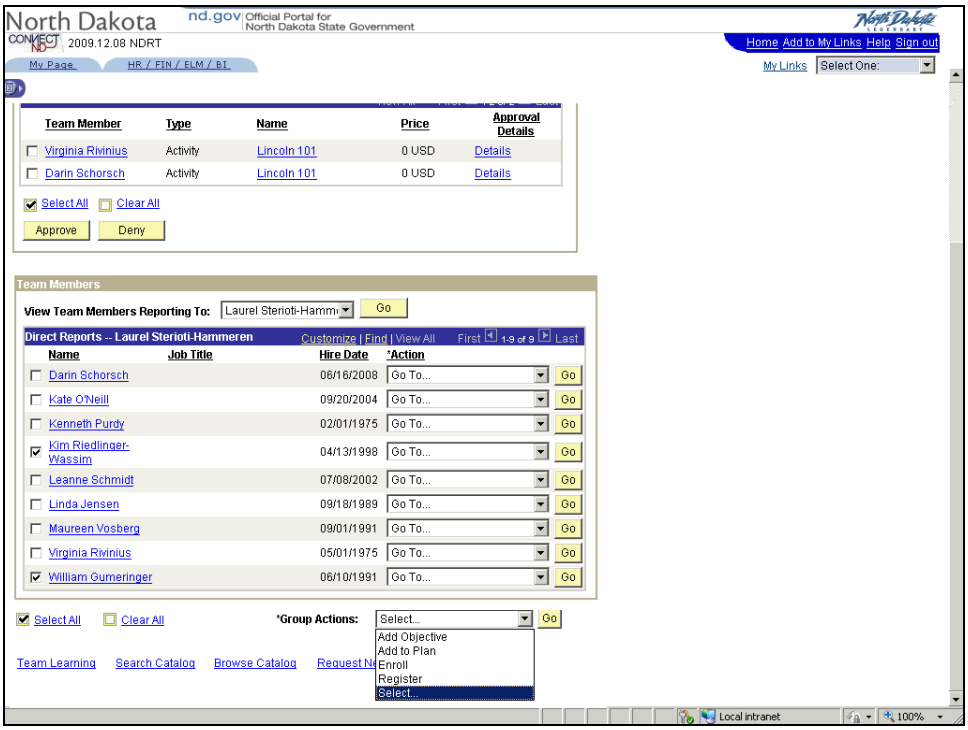
By the end of this topic, you will be able to:

- Navigate to the **Team Members** page.
- Enroll team members into an Activity.

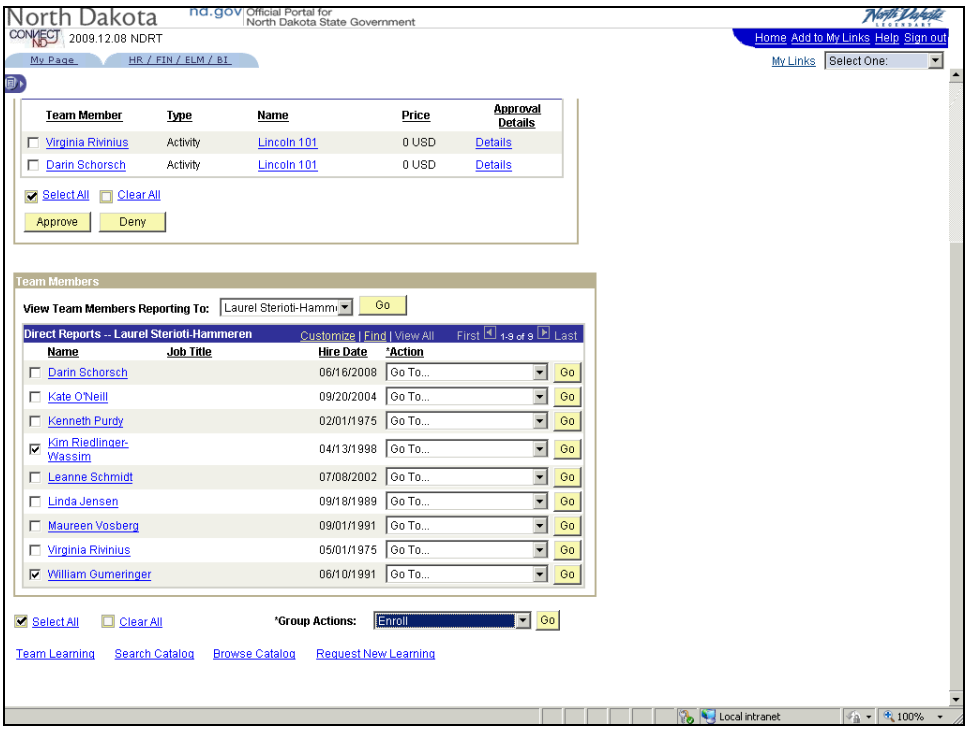
Step	Action
1.	Click the scrollbar.
2.	Click the **ELM MSS Team Member** link. ELM MSS Team Member



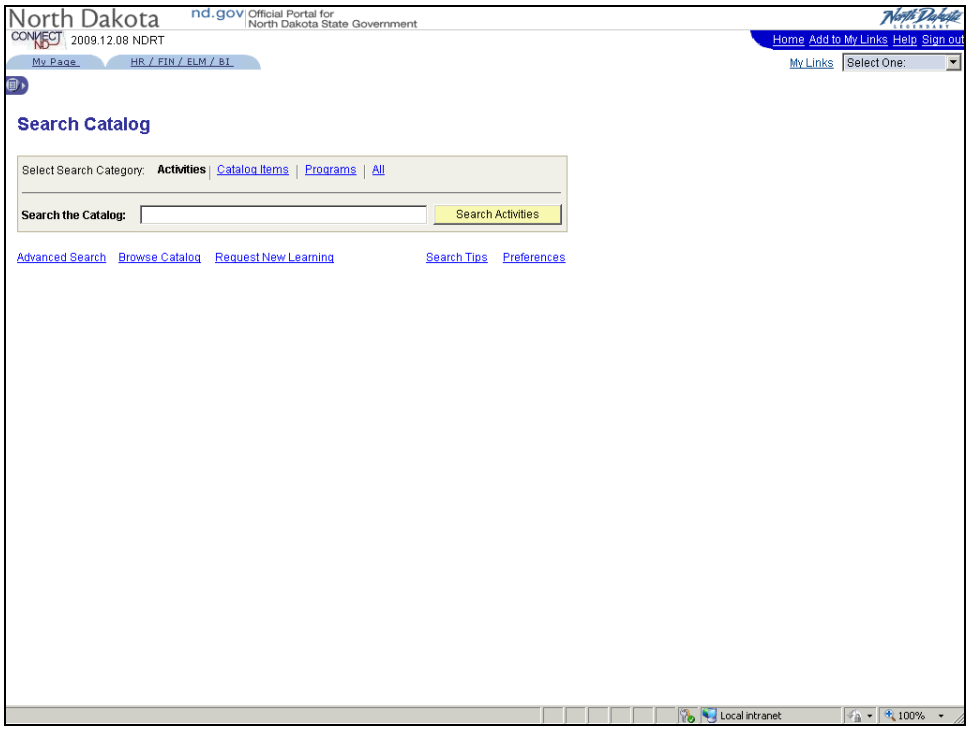
Step	Action
3.	Click the **Collapse Menu** button.
4.	The **Team Members** page is used by managers to review a list of their team members, oversee team learning and approve or deny learning requests.
5.	Notice there are currently two learning requests that are awaiting approval.
6.	Click the scrollbar.
7.	Click the **Kim Riedlinger-Wassim** option.
8.	Click the **William Gumeringer** option.
9.	Click the **Group Actions** drop down list.



Step	Action
10.	Select the "**Enroll**" list item. Enroll

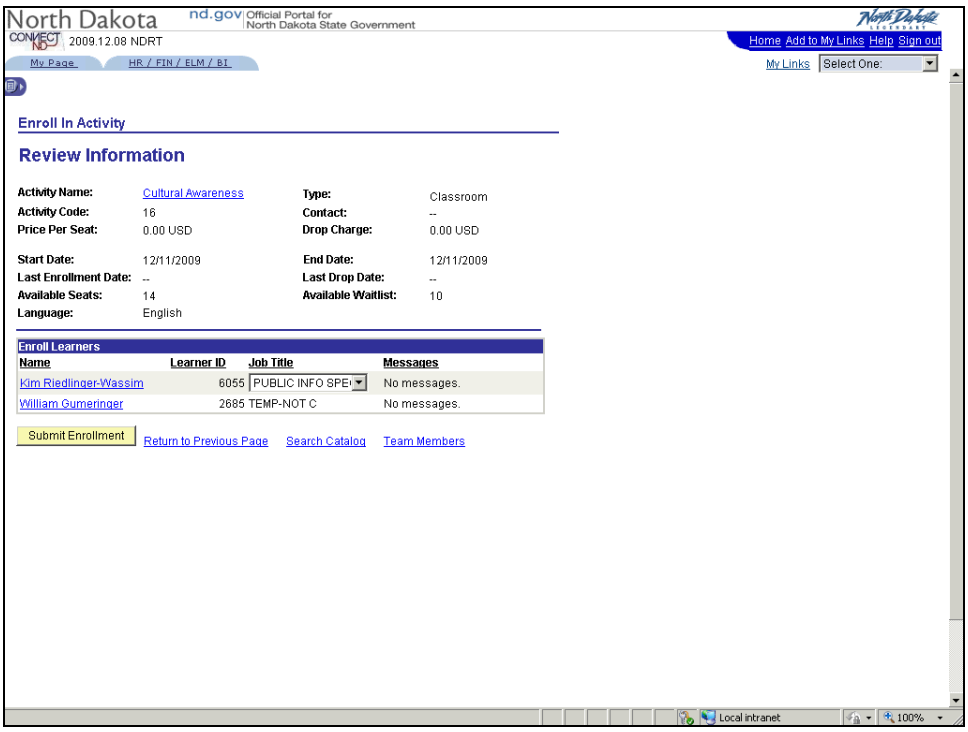


Step	Action
11.	Click the **Go** button. Go
12.	Use the **Search Catalog** page to search the catalog for activities to add to a team member's learning plan.



Step	Action
13.	Click in the **Search the Catalog** field.
14.	Enter the desired information into the **Search Activities** field. Enter "**Cultural Awareness**".
15.	Click the **Search Activities** button. Search Activities
16.	Notice there are two activities in the catalog for Cultural Awareness that are offered. One is offered on 12/08/2009 and the other on 12/11/2009.
17.	Enroll the two selected team members in the **Cultural Awareness** activity that is being offered on 12/11/2009.
18.	Click the **Enroll** link. Enroll

Step	Action
19.	Prior to submitting the enrollment you are able to review detailed information about the activity. Notice this course currently has **14** available seats.



Step	Action
20.	Click the **Submit Enrollment** button. Submit Enrollment
21.	Notice after submitting the enrollment the Enrollment Confirmation page displays where you are able to view both learners have been successfully enrolled into the activity and the Available Seats field has been updated.
22.	**Congratulations**! You should now be able to: - Navigate to the **Team Members** page. - Enroll team members into an Activity. **End of Procedure.**

2.2 Adding Supplemental Learning to Team Members Learning

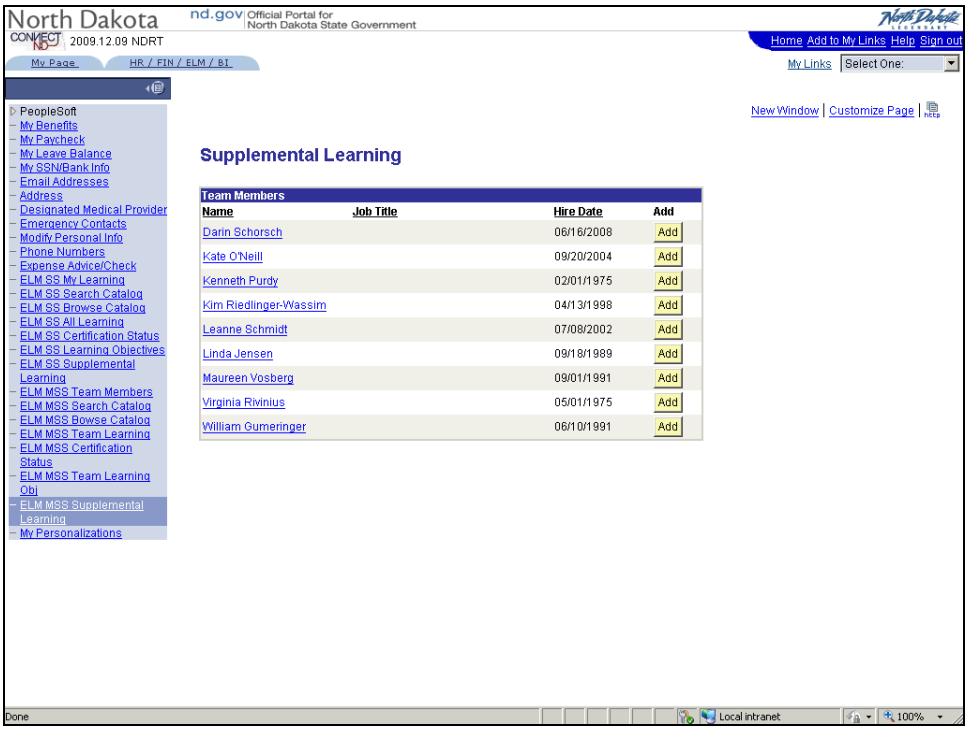
Managers can add supplemental learning to their team members training plan via manager self-service. Supplemental Learning is any learning that is not listed in the catalog.

Procedure

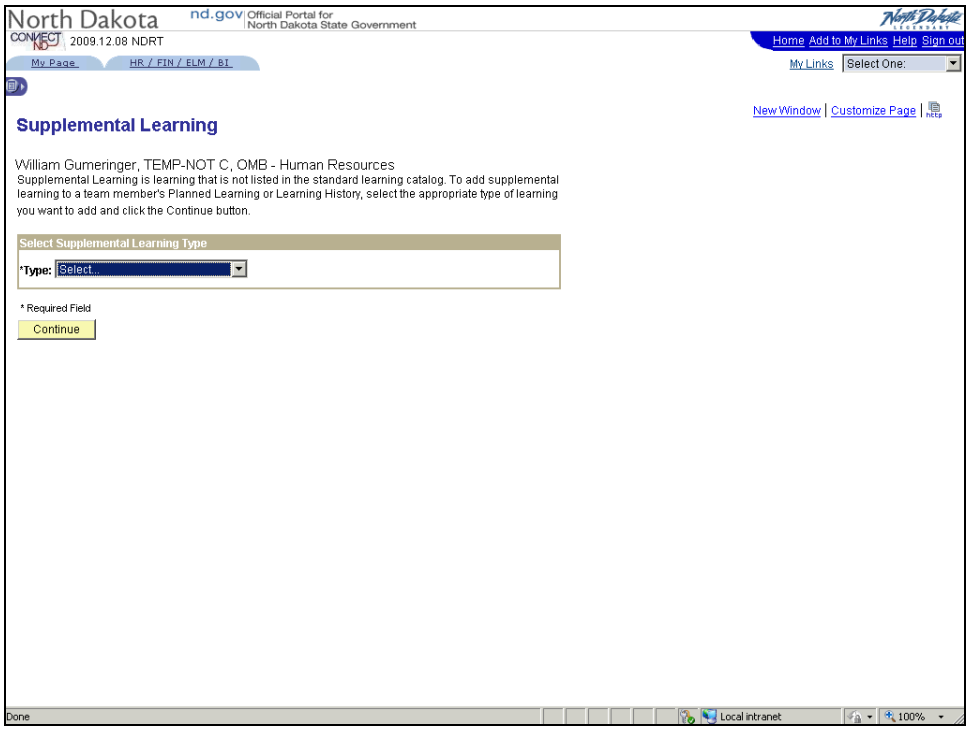
By the end of this topic, you will be able to:

- Navigate to the **Supplemental Learning** page.
- Add supplemental learning to a learners training plan.

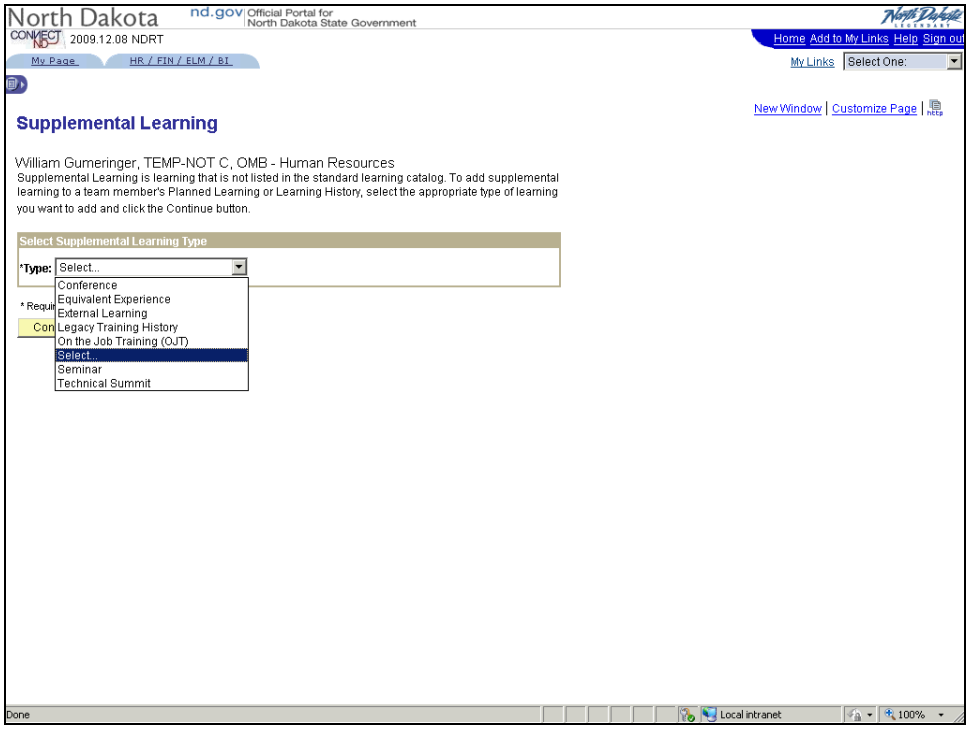
Step	Action
1.	Click the scrollbar.
2.	Click the **ELM MSS Supplemental Learning** link. ELM MSS Supplemental Learning



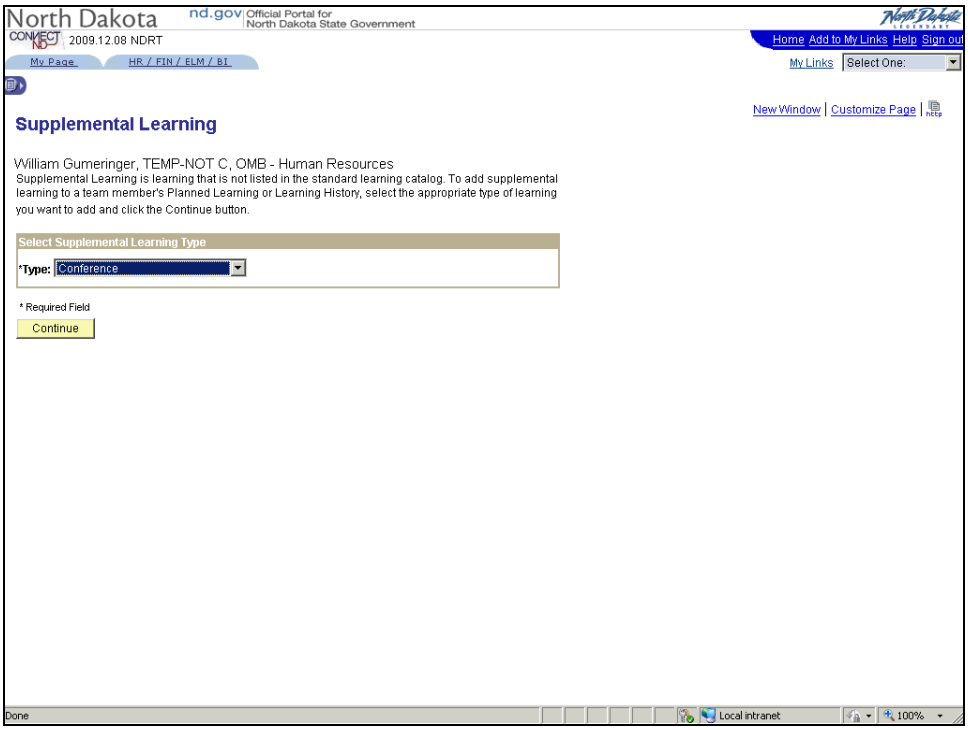
Step	Action
3.	Click the **Collapse Menu** button.
4.	Click the **Add** button.



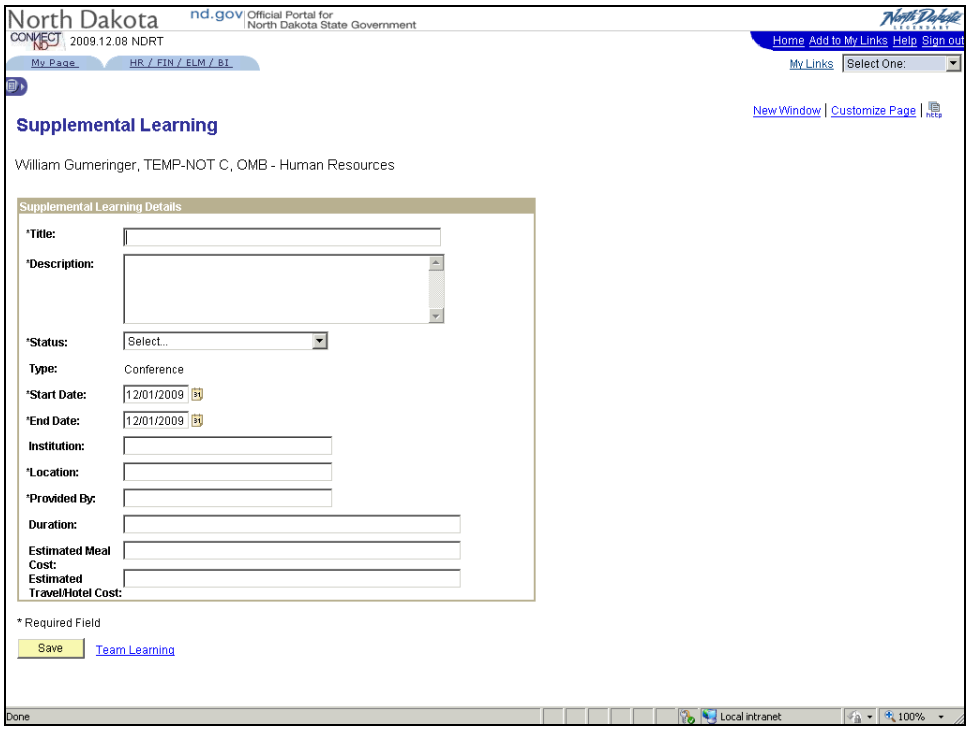
Step	Action
5.	Click the **Type** drop-down list.



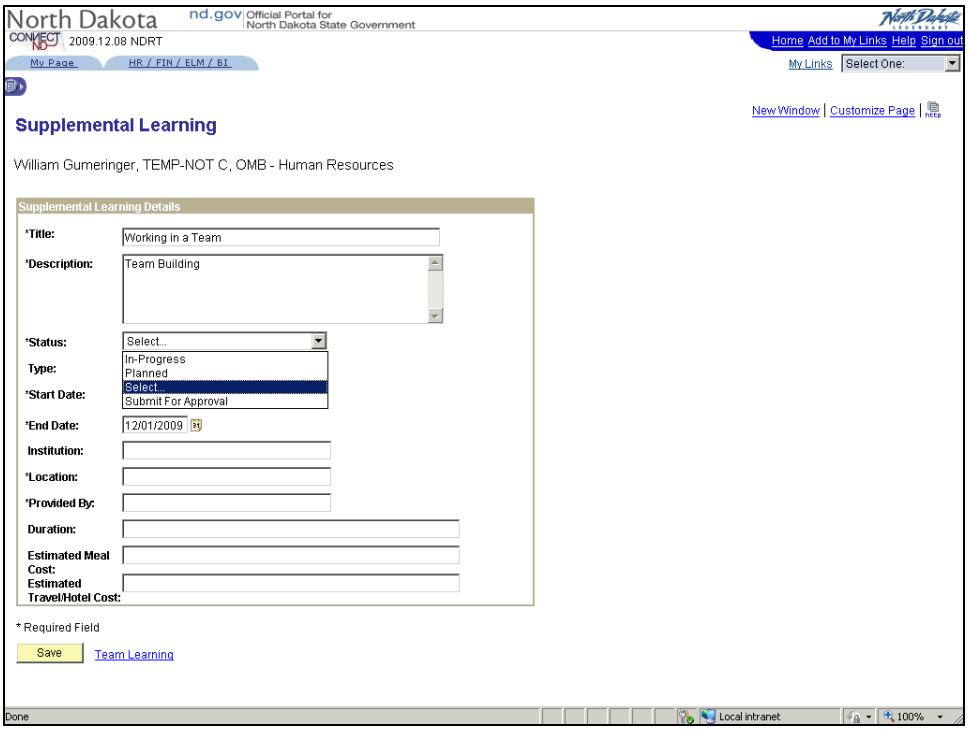
Step	Action
6.	Select the "**Conference**" list item. Conference
7.	**Note**: To enter education units for tracking purposes, the "**External Learning**" supplemental learning type must be selected from the drop-down list.



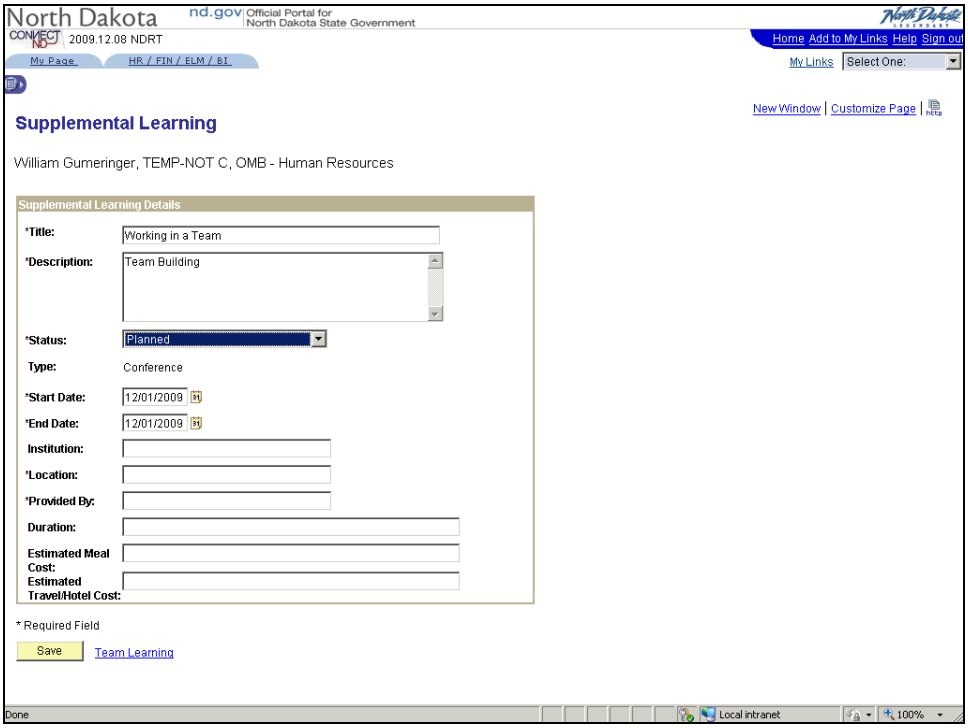
Step	Action
8.	Click the **Continue** button. Continue



Step	Action
9.	Enter the desired information into the **Title** field. Enter "**Working in a Team**".
10.	Click in the **Description** field.
11.	Enter the desired information into the **Description** field. Enter "**Team Building**".
12.	Click the **Status** drop-down list.



Step	Action
13.	Select the "**Planned**" list item. Planned



Step	Action
14.	Click in the **Start Date** field. 12/01/2009
15.	Press **[Delete]**.
16.	Enter the desired information into the **Start Date** field. Enter "**12/28/2009**".
17.	Click in the **End Date** field. 12/01/2009
18.	Press **[Delete]**.
19.	Enter the desired information into the **End Date** field. Enter "**12/29/2009**".
20.	Click in the **Location** field.
21.	Enter the desired information into the **Location** field. Enter "**Bismarck, ND**".
22.	Click in the **Provided By** field.
23.	Enter the desired information into the **Provided By** field. Enter "**State of North Dakota**".
24.	Click the **Save** button. Save
25.	The supplemental learning has been successfully added.
26.	**Congratulations**! You should now be able to: - Navigate to the **Supplemental Learning** page. - Add supplemental learning to a learners training plan. **End of Procedure.**

2.3 Viewing Team Members Learning

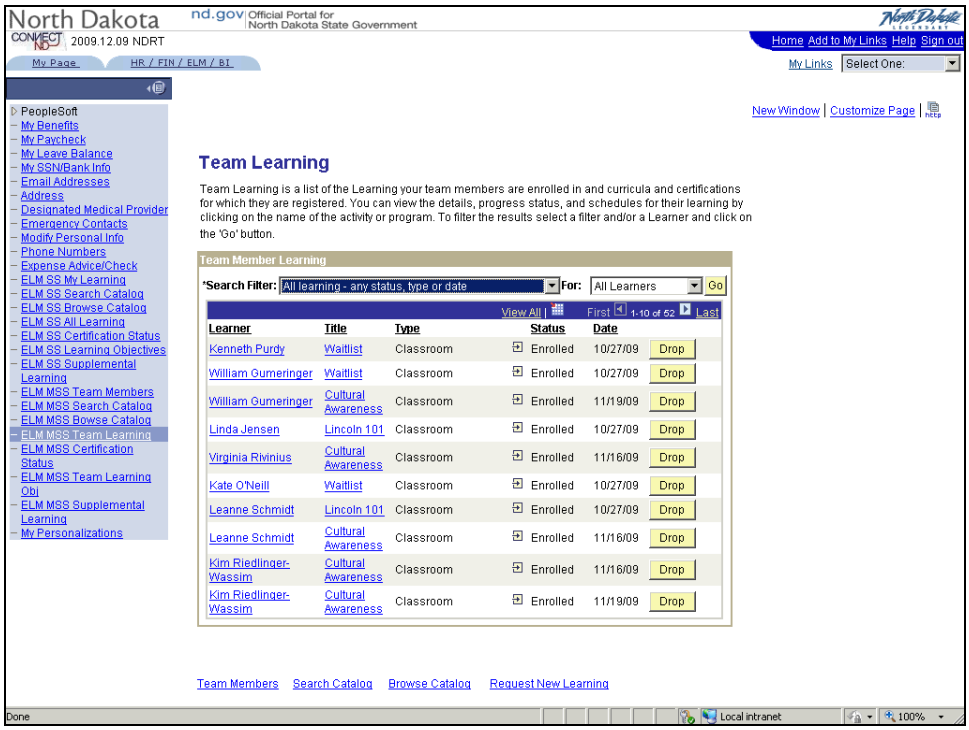
The **Team Learning** page allows managers to view a list of learning activities that his/her team members are enrolled in and curricula and certifications for which they are registered. Managers can view the details, progress status and schedules for their learning by clicking on the name of the activity or program.

Procedure

By the end of this topic, you will be able to:

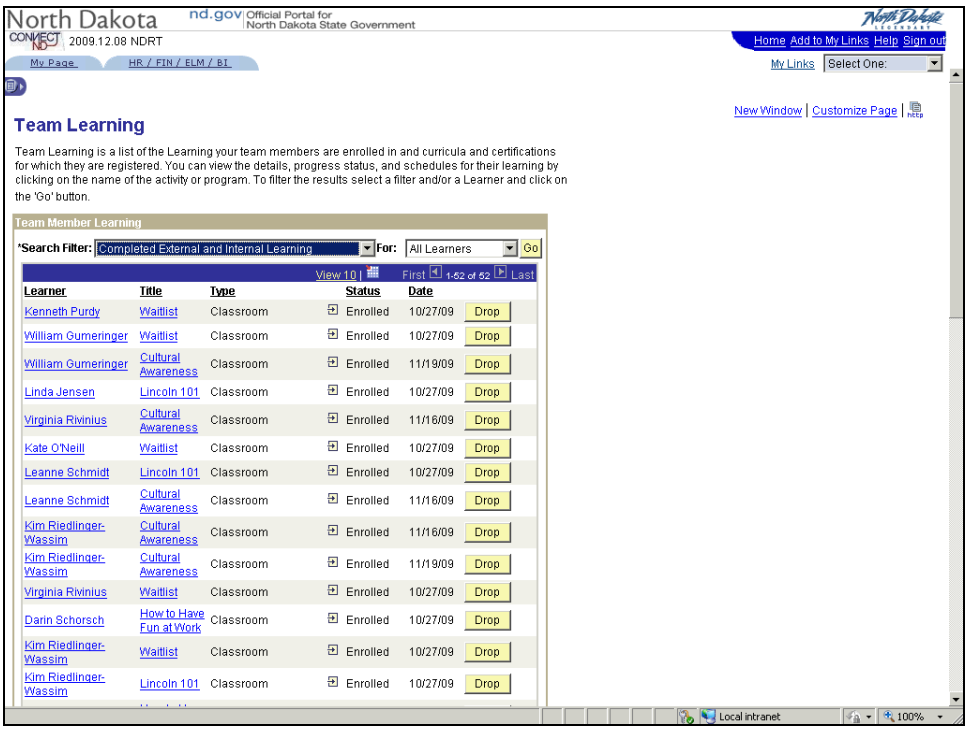
- Navigate to the **Team Learning** page.
- View team members learning.

Step	Action
1.	Click the scrollbar.
2.	Click the **ELM MSS Team Learning** link. ELM MSS Team Learning



Step	Action
3.	Click the **Collapse Menu** button.
4.	The **Team Learning** page can be used by manager's to view a list of learning activities that his/her learning team members are enrolled in and curricula and certifications for which they are registered. Managers can view the details, progress status and schedules for their learning by clicking on the name of the activity or program. Managers can also enroll and drop team members from learning activities and programs as well as modify learning requests.
5.	Click the **View All** link. View All |
6.	Click the scrollbar.
7.	View the different status' for team members.
8.	Click the scrollbar.
9.	Click the **Search Filter** drop down list.

Step	Action
10.	Select the "**Completed External and Internal Learning**" list item. Completed External and Internal Learning



Step	Action
11.	Click the **Go** button. Go
12.	Notice the search results list displays only those activities or certifications that have been completed.
13.	Click the scrollbar.
14.	View the team members that have completed the **Cert 1** program.
15.	**Congratulations**! You should be able to: - Navigate to the **Team Learning** page. - View team members learning. **End of Procedure.**

2.4 Submitting Learning Requests

Managers have the ability to submit learning requests on behalf of learners. Learning requests enable users to request activities that are listed in the catalog.

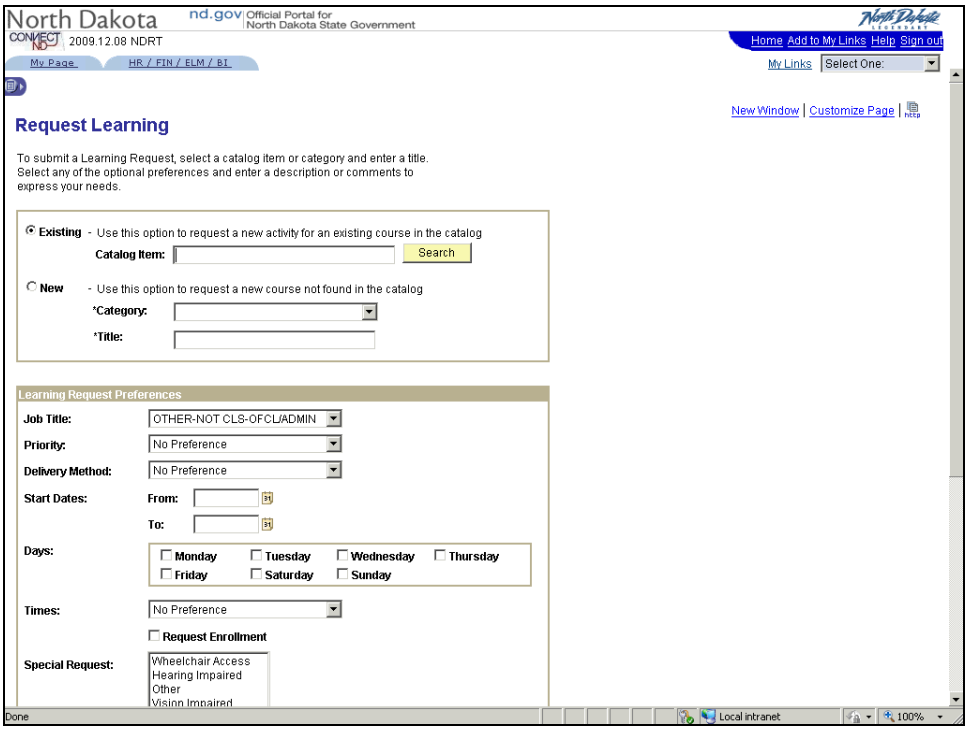
Procedure

By the end of this topic, you will be able to:

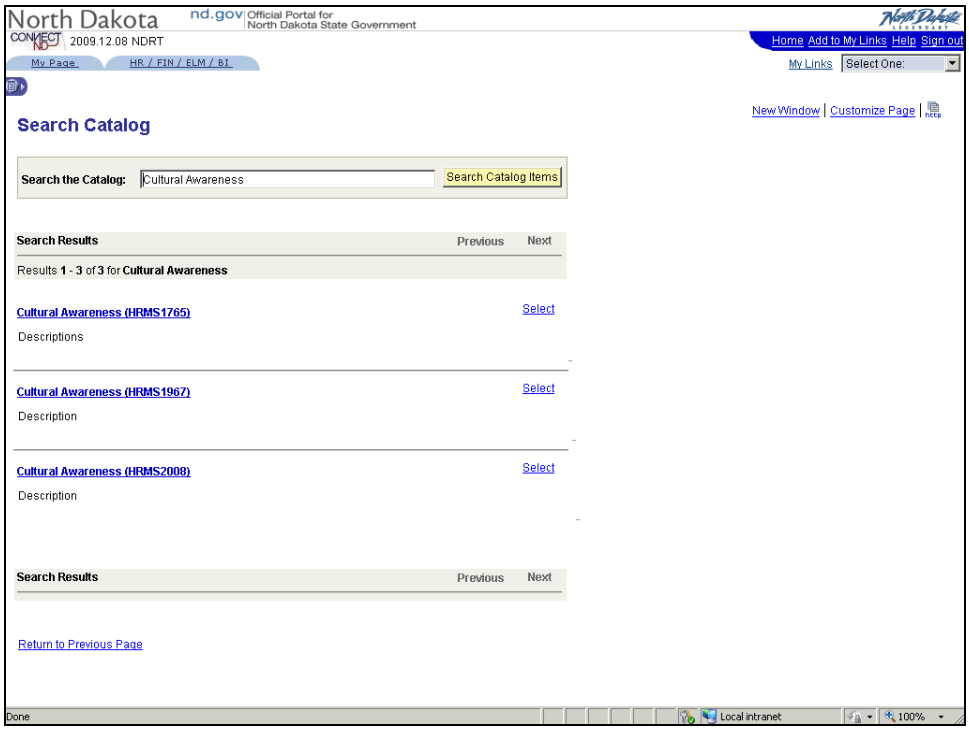
- Navigate to the **Request Learning** page.
- Submit learning requests.

Step	Action
1.	Click the scrollbar.
2.	Click the **ELM MSS Search Catalog** link. **ELM MSS Search Catalog**

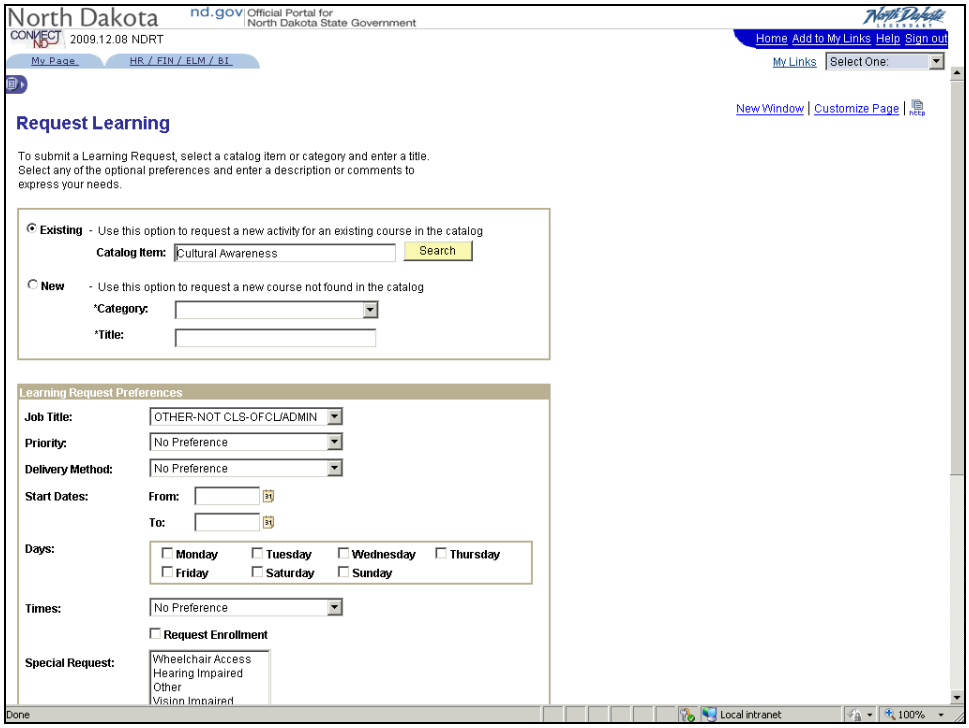
Step	Action
3.	Click the **Collapse Menu** button.
4.	The **Search Catalog** page is used to locate activities to add to a team members learning plan.
5.	Click the **Request New Learning** link. Request New Learning



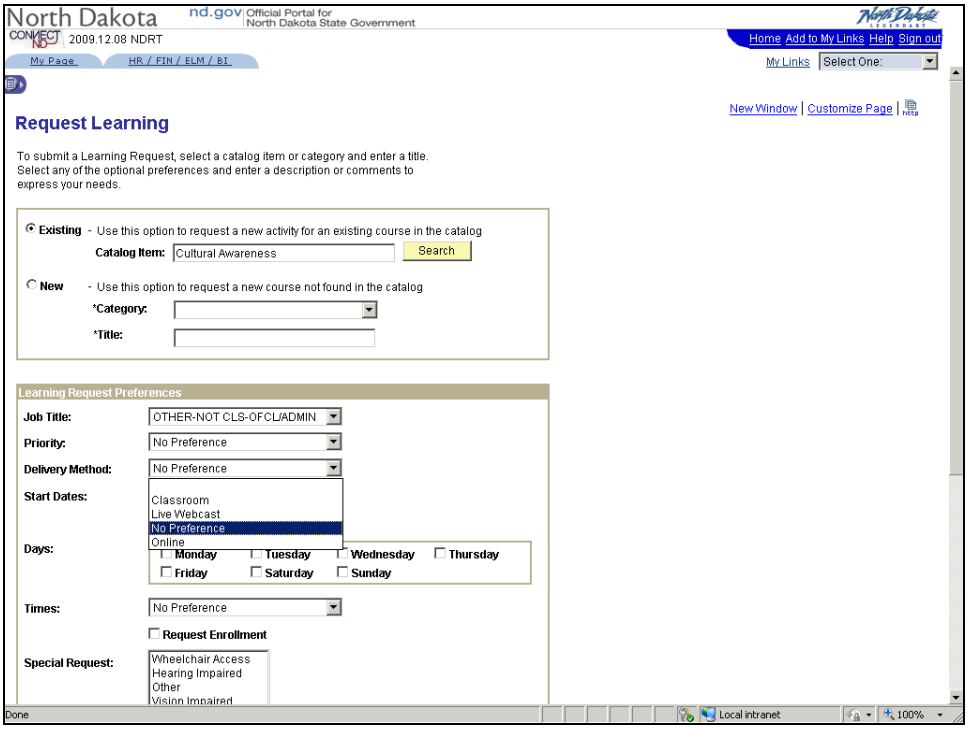
Step	Action
6.	Enter the desired information into the **Catalog Item** field. Enter "**Cultural Awareness**".
7.	Click the **Search** button. Search



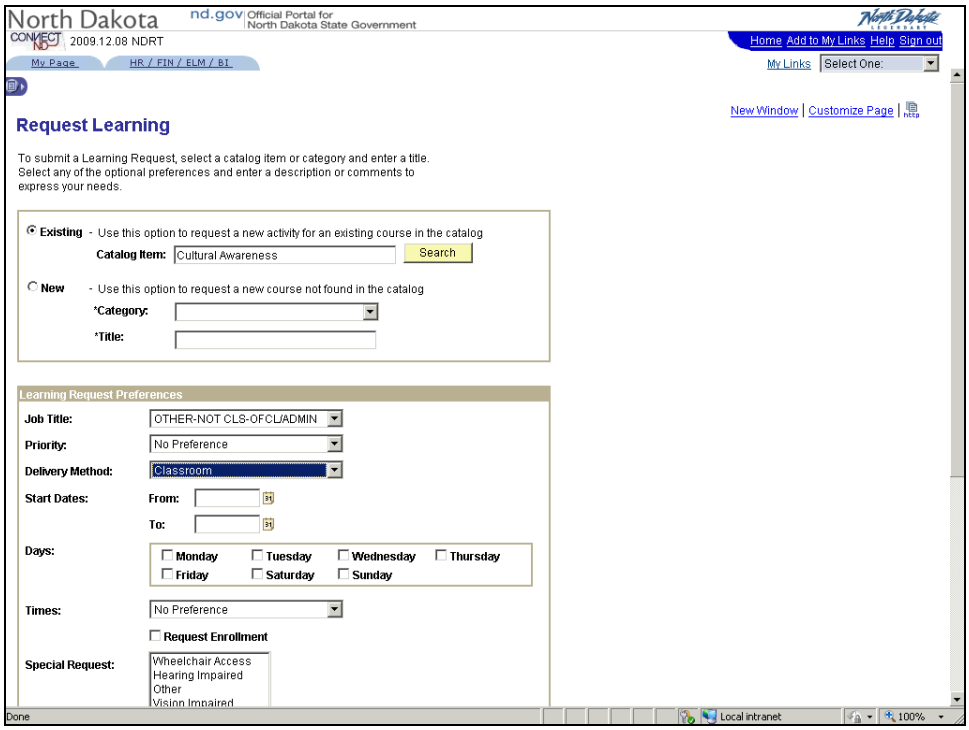
Step	Action
8.	Click the **Select** link. Select



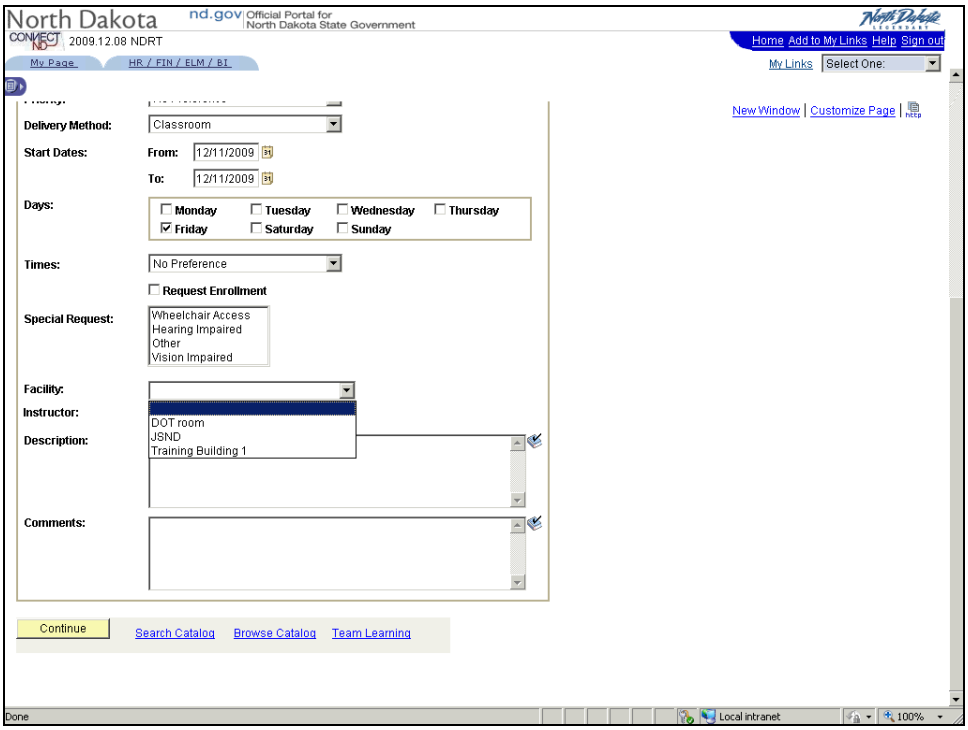
Step	Action
9.	Click the **Delivery Method** drop-down list.



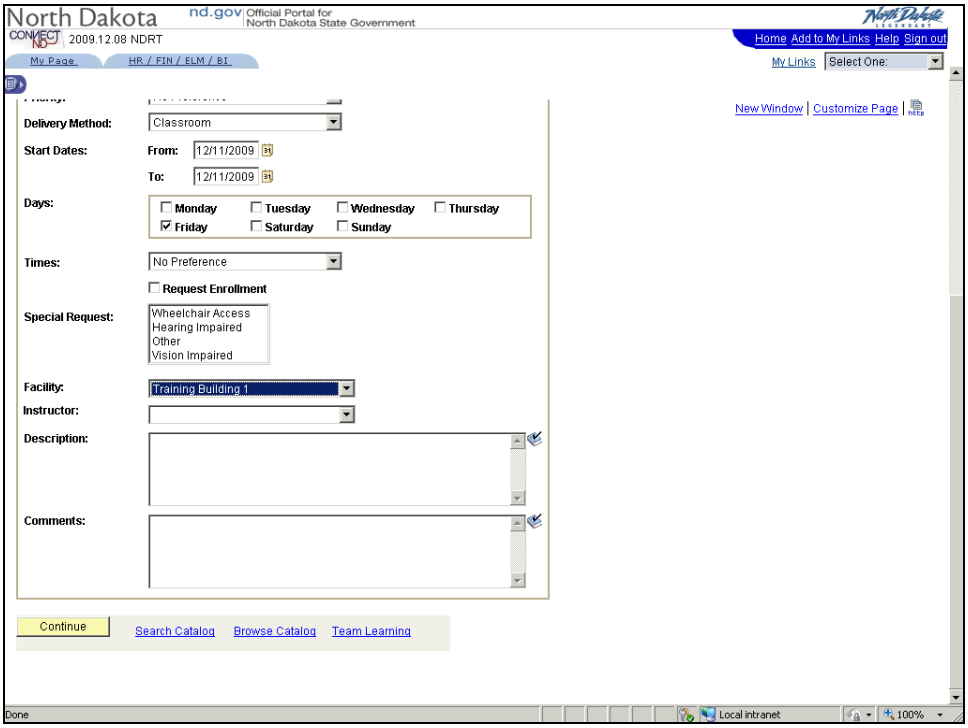
Step	Action
10.	Select the "**Classroom**" list item.



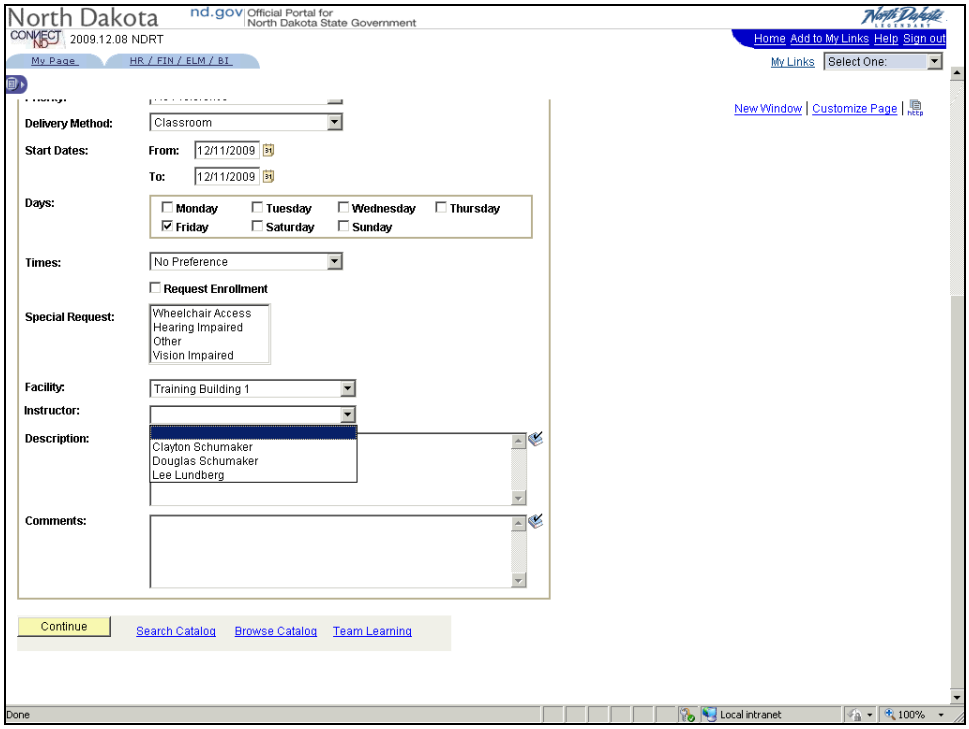
Step	Action
11.	Click in the **From** field.
12.	Enter the desired information into the **From** field. Enter "**12/11/2009**".
13.	Click in the **To** field.
14.	Enter the desired information into the **To** field. Enter "**12/11/2009**".
15.	Click the "**Friday**" option.
16.	Click the scrollbar.
17.	Click the **Facility** drop-down list.



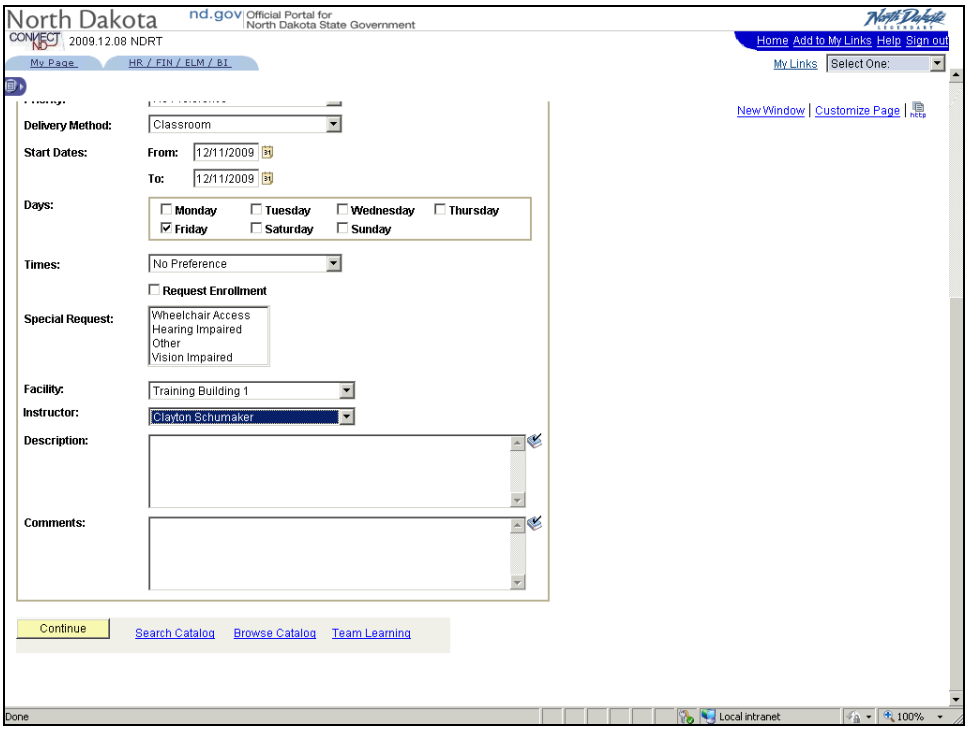
Step	Action
18.	Select the "**Training Building 1**" list item. Training Building 1



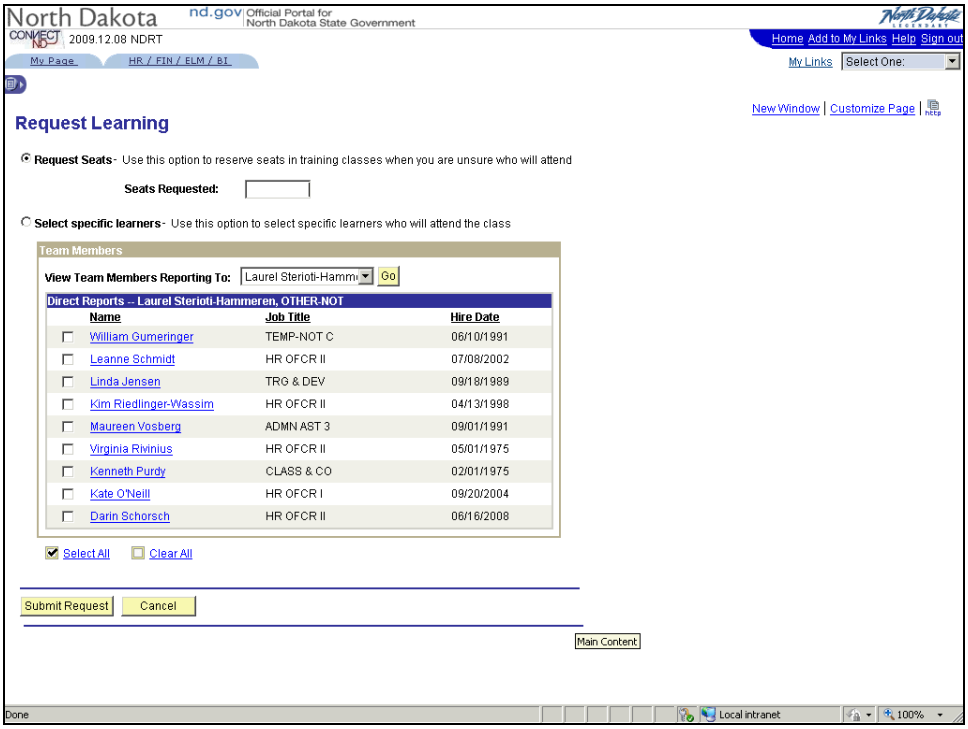
Step	Action
19.	Click the **Instructor** drop-down list.



Step	Action
20.	Select the "**Clayton Schumaker**" list item.



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



Step	Action
22.	Click the **Maureen Vosberg** option.
23.	Click the **Submit Request** button. Submit Request
24.	Notice the learning request has been submitted successfully.
25.	**Congratulations**! You should now be able to: - Navigate to the **Request Learning** page. - Submit learning requests. **End of Procedure.**

2.5 Approving/Denying the Enrollment of Learners

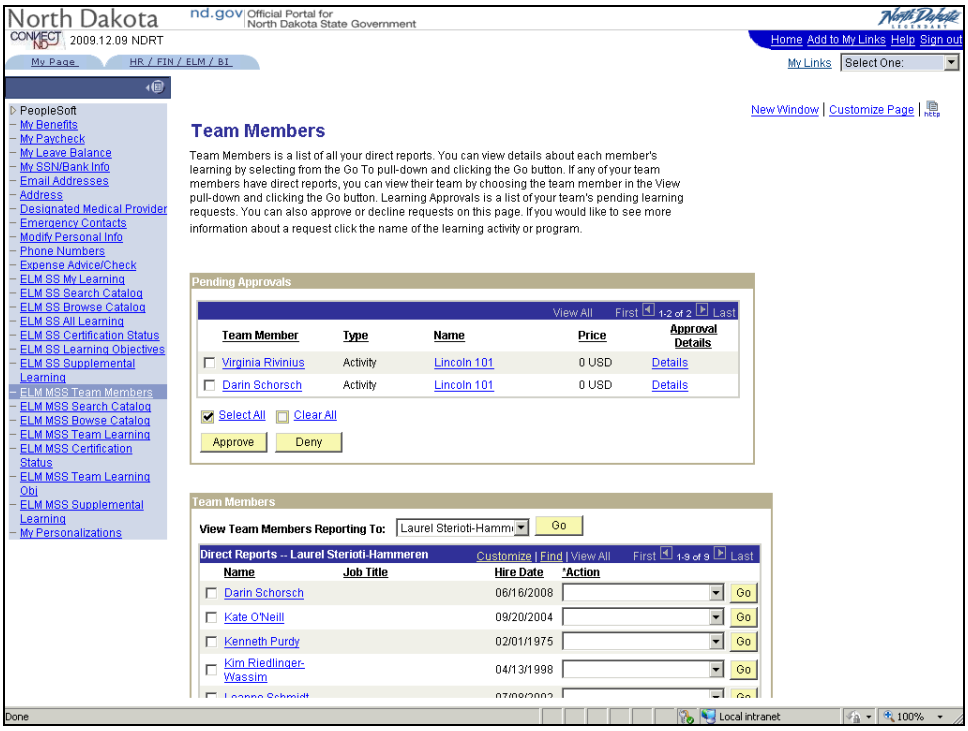
Managers have the ability to approve and deny a team members learning request from the **Team Members** page. All pending requests will display for managers when they open this page.

Procedure

By the end of this topic, you will be able to:

- Navigate to the **Team Members** page.
- Approve enrollment of learners.

Step	Action
1.	Click the scrollbar.
2.	Click the **ELM MSS Team Member** link. **ELM MSS Team Member**



Step	Action
3.	Click the **Collapse Menu** button.
4.	The **Team Members** page is used by managers to review a list of their team members, oversee team learning and approve or deny learning requests.
5.	Click the **Virginia Rivinius** option.
6.	Click the **Approve** button. Approve
7.	Notice Virginia Rivinius has been successfully enrolled in the activity: **Lincoln 101**.
8.	**Congratulations**! You should now be able to: - Navigate to the **Team Members** page. - Approve enrollment of learners. **End of Procedure.**

2.6 Detailing Multiple Approvers

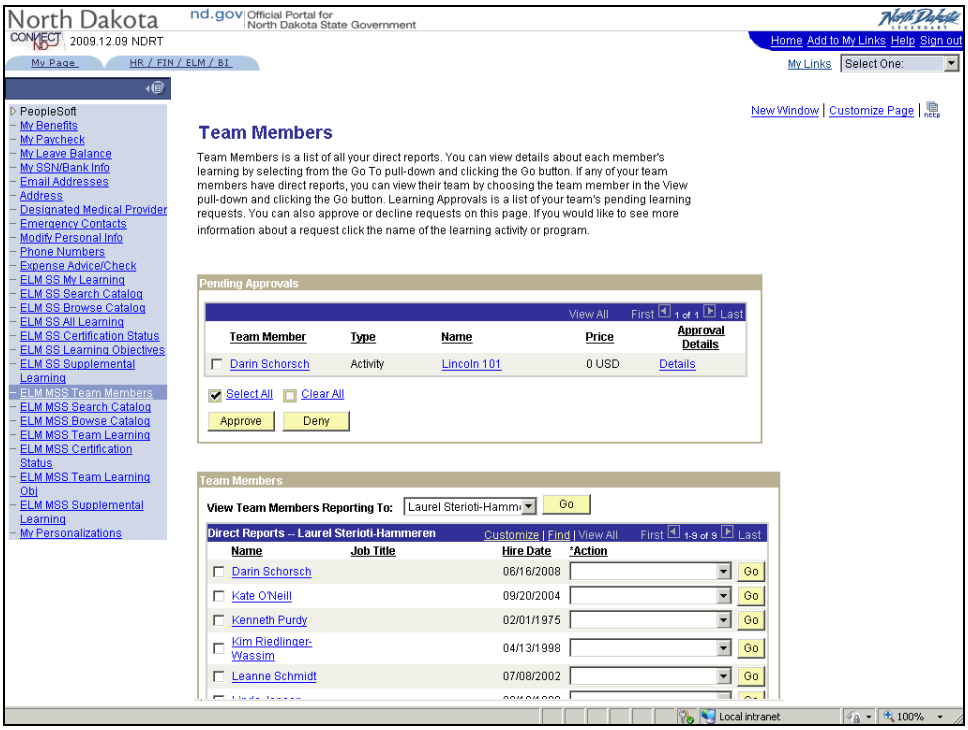
Managers have the ability to specify the approval process for their assigned team members.

Procedure

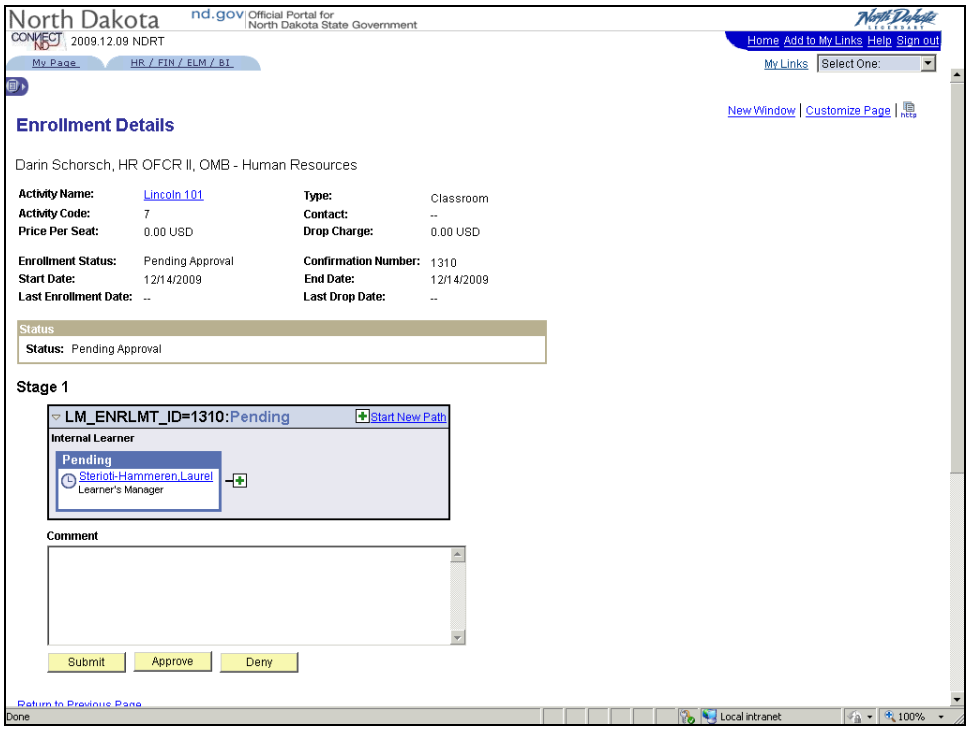
By the end of this topic, you will be able to:

- Navigate to the **Team Members** page.
- Detail multiple approvers.

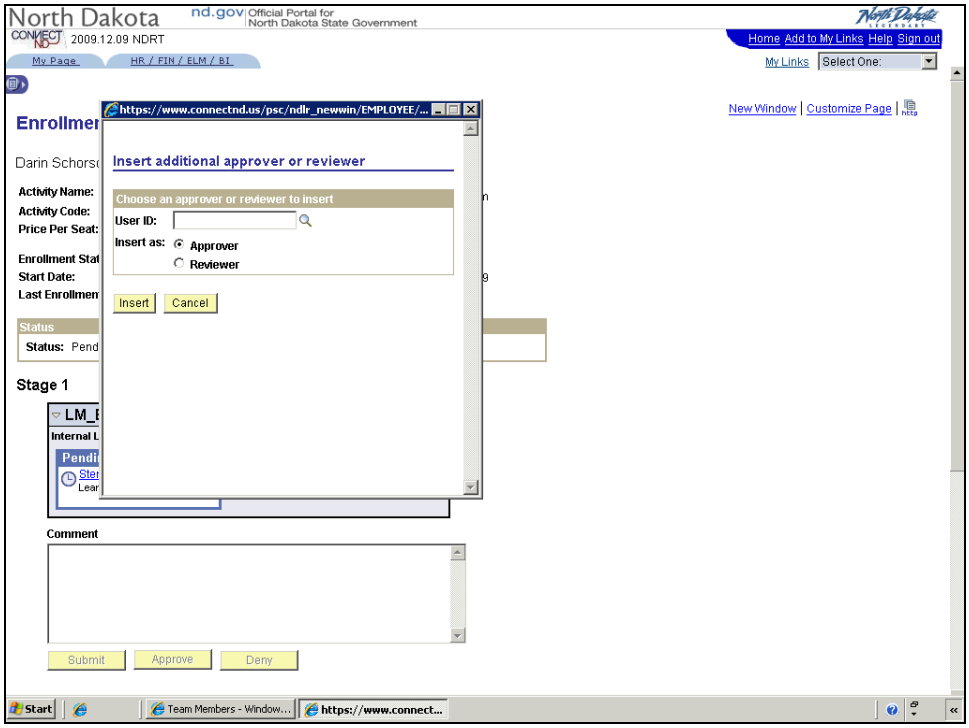
Step	Action
1.	Click the scrollbar.
2.	Click the **ELM MSS Team Member** link. ELM MSS Team Member



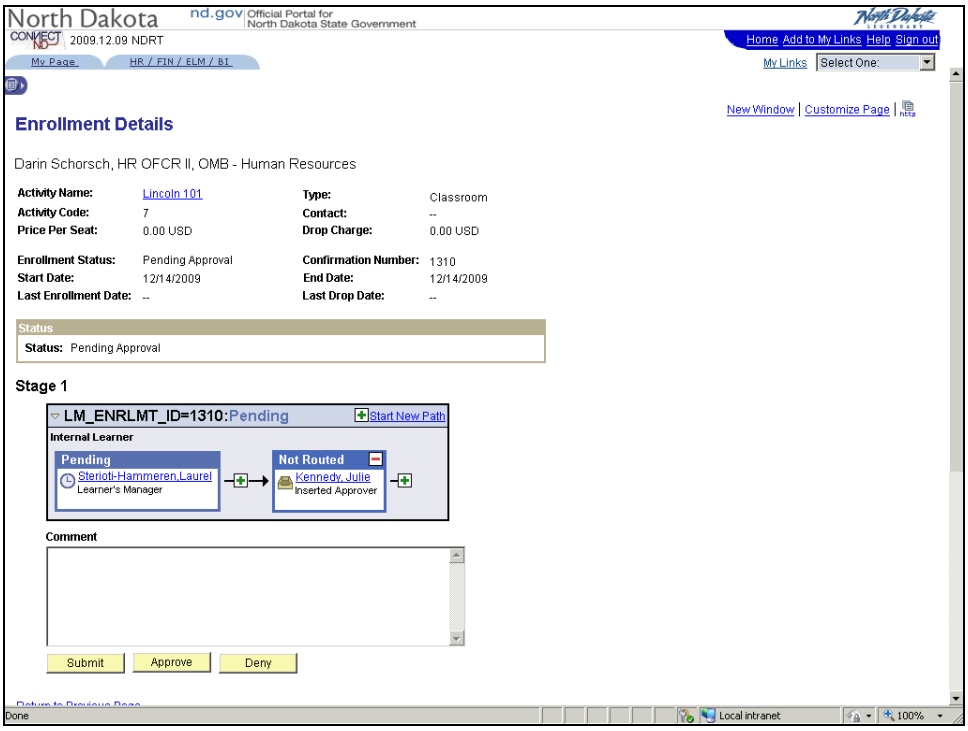
Step	Action
3.	Click the **Collapse Menu** button.
4.	The **Team Members** page is used by managers to review a list of their team members, oversee team learning and approve or deny learning requests.
5.	Click the **Details** link. Details



Step	Action
6.	Click the **Insert Approver** button.



Step	Action
7.	Click the **User ID Lookup** button.
8.	Click in the **Name** field.
9.	Enter the desired information into the **Name** field. Enter "**Kennedy**".
10.	Click the **Search** button. Search
11.	Click the "**jukennedy**" list item. jukennedy
12.	An **Approver** has the same rights as a manager. They have the ability to approve or deny learning requests.
13.	A **Reviewer** only has the ability to review learning requests. They do not have security permissions to approve or deny learning requests.
14.	Click the **Insert** button. Insert
15.	Notice Julie Kennedy now displays as an Approver.



Step	Action
16.	Click the **Submit** button. Submit
17.	Click the scrollbar.
18.	Click the **Approve** button. Approve
19.	Julie has been successfully added as an approver.
20.	**Congratulations**! You should now be able to: - Navigate to the **Team Members** page. - Detail multiple approvers. **End of Procedure.**

2.7 Changing Approval on a System Profile

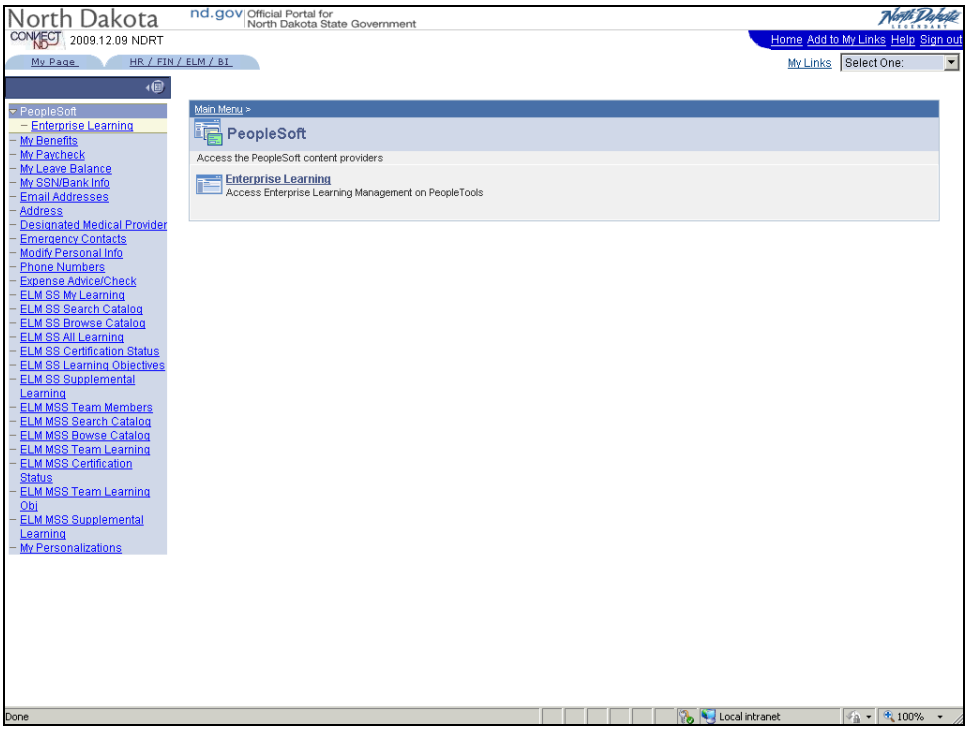
Managers can assign an alternate approver in the event they are unavailable to approve learning requests for a period of time.

Procedure

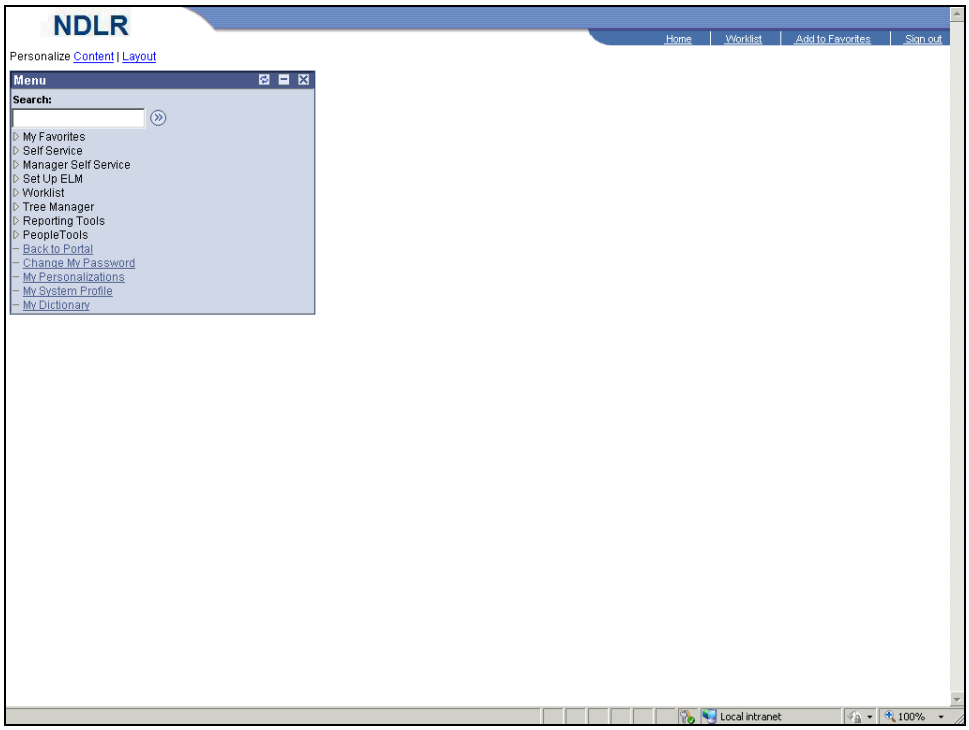
By the end of this topic, you will be able to:

- Navigate to the **General Profile Information** page.
- Change approval on a system profile.

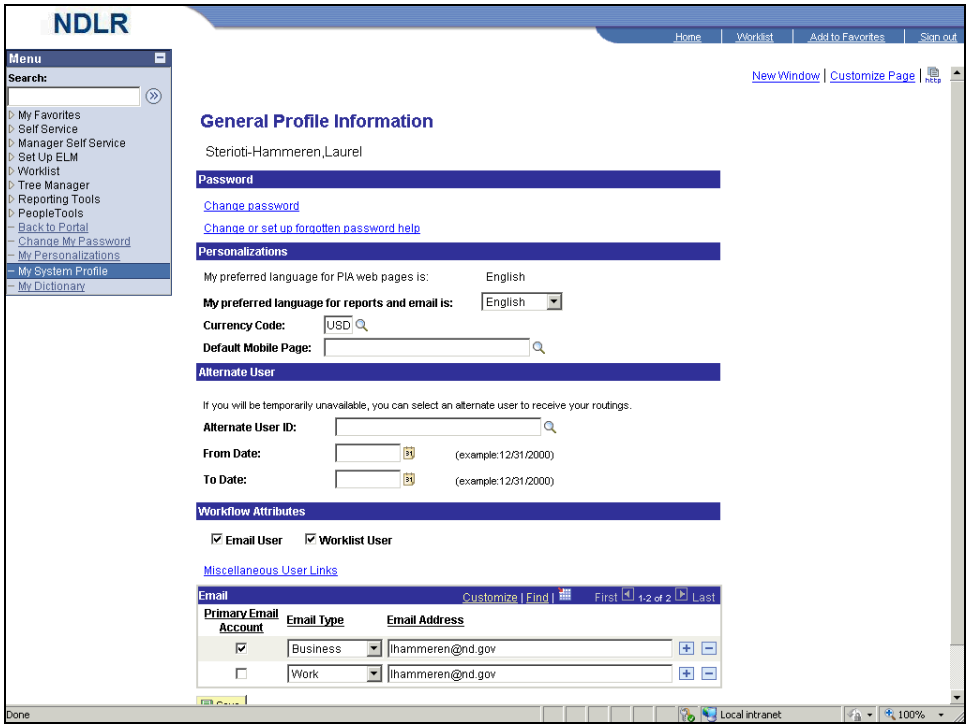
Step	Action
1.	Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft



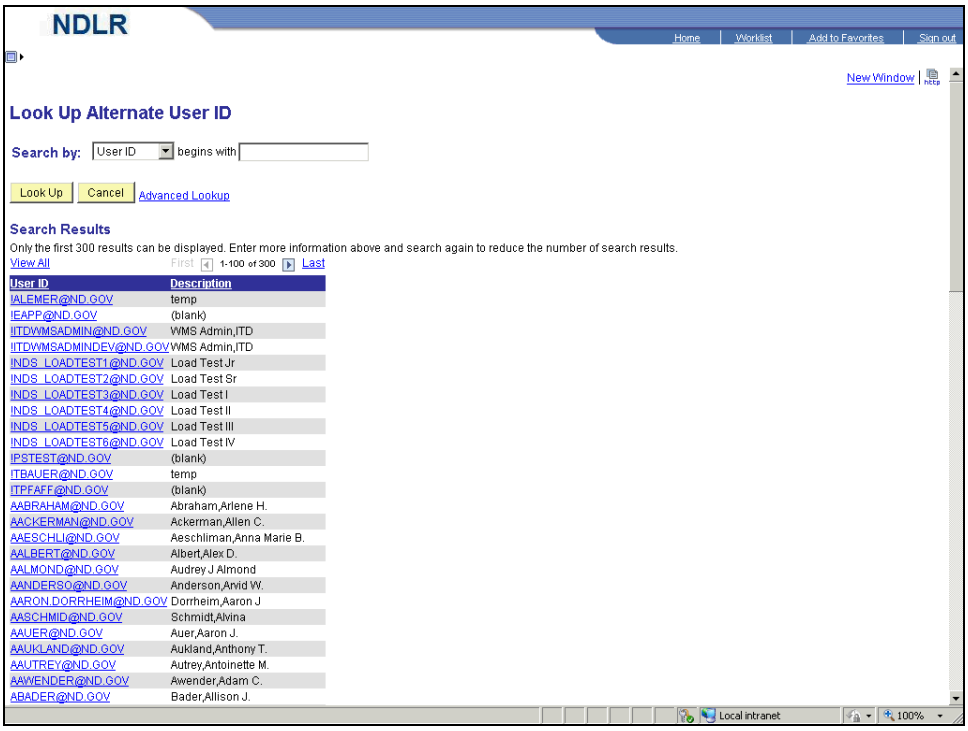
Step	Action
3.	Click the **Enterprise Learning** link. – Enterprise Learning



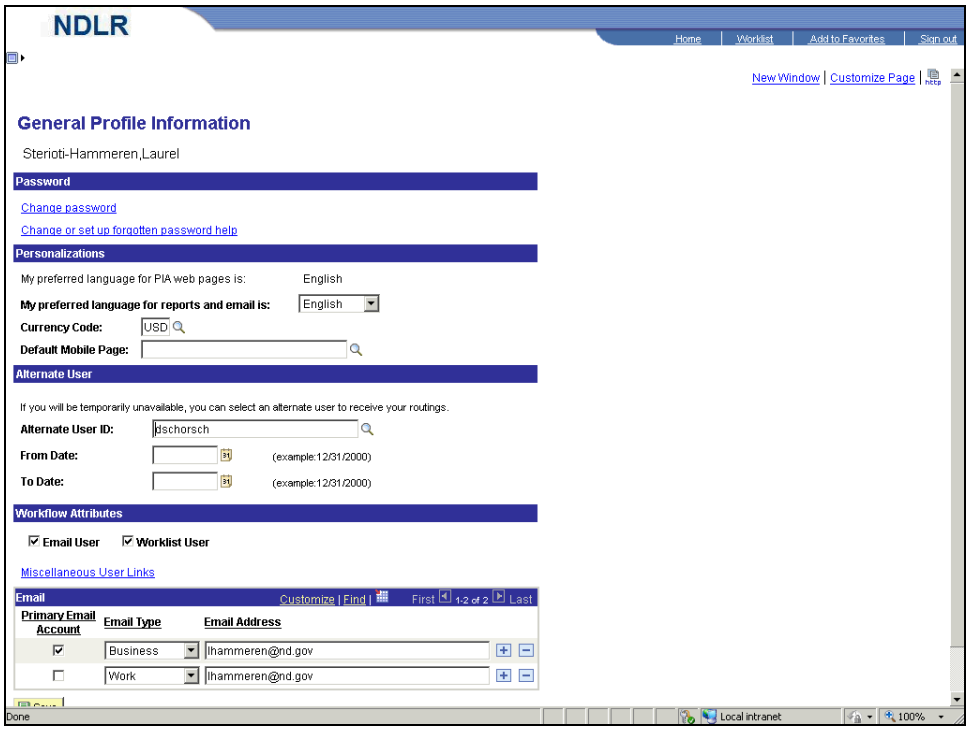
Step	Action
4.	Click the **My System Profile** link. My System Profile



Step	Action
5.	Click the **Collapse Menu** button.
6.	Click the **Alternate User ID Lookup** button.



Step	Action
7.	Click in the **begins with** field.
8.	Enter the desired information into the **begins with** field. Enter "**dschorsch**".
9.	Click the **Look Up** button. Look Up
10.	Select the "**dschorsch**" list item. dschorsch



Step	Action
11.	Click in the **From Date** field.
12.	Enter the desired information into the **From Date** field. Enter "**12/30/2009**".
13.	Click in the **To Date** field.
14.	Enter the desired information into the **To Date** field. Enter "**12/31/2009**".
15.	Click the scrollbar.
16.	Click the **Save** button.
17.	The alternate approver has been successfully added.
18.	**Congratulations**! You should now be able to: - Navigate to the **General Profile Information** page. - Change approval on a system profile. **End of Procedure.**

2.8 Dropping a Team Members Learning

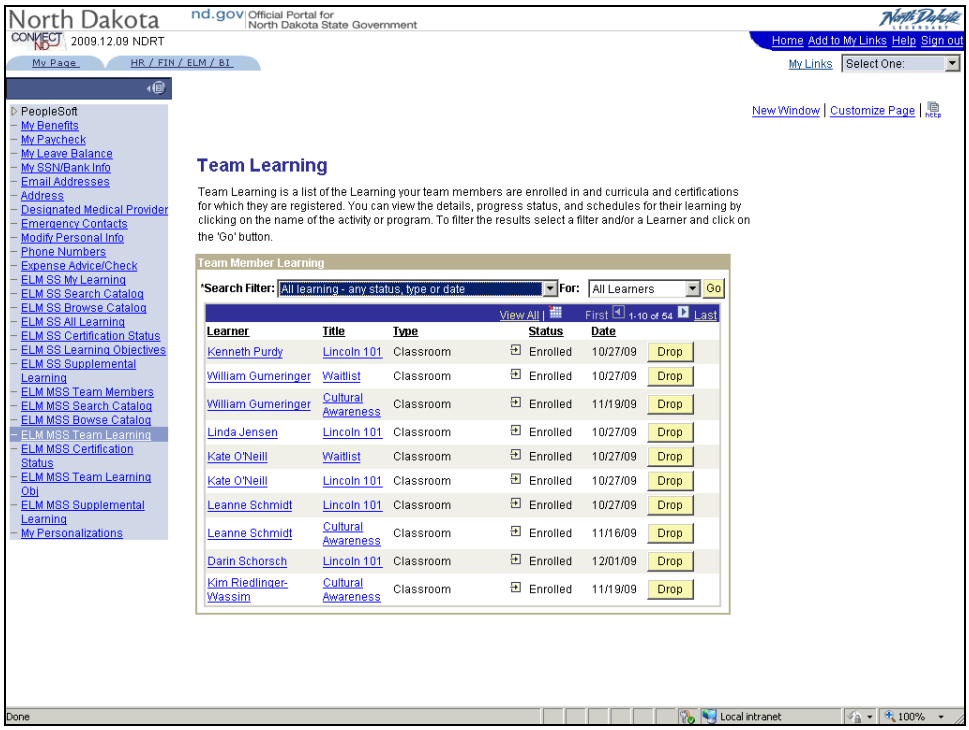
Managers can drop a learner's enrollment from an activity or drop their registration from a program.

Procedure

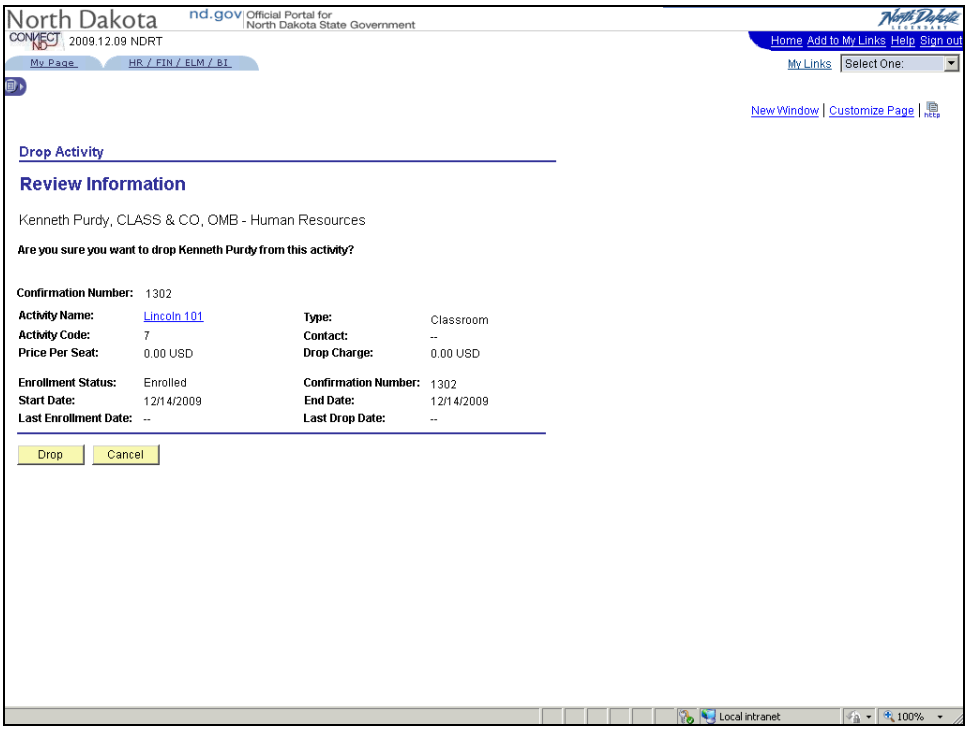
By the end of this topic, you will be able to:

- Navigate to the **Team Learning** page.
- Drop a Team Members learning.

Step	Action
1.	Click the scrollbar.
2.	Click the **ELM MSS Team Learning** link. ELM MSS Team Learning



Step	Action
3.	Click the **Collapse Menu** button.
4.	The **Team Learning** page is used by managers to view a list of learning activities that his/her team members are enrolled in and/or curricula/certifications they are registered for.
5.	Click the **Drop** button.



Step	Action
6.	Click the **Drop** button. Drop
7.	Kenneth Purdy has been successfully dropped from activity: **Lincoln 101**.
8.	**Congratulations**! You should now be able to: - Navigate to the **Team Learning** page. - Drop a Team Members learning. **End of Procedure.**

ELM Learning Administrator

Lesson 2: Managing Resources

2.1 Defining Equipment

Equipment constitutes all of the individual pieces of equipment that is available in the system. After defining equipment types, the next step is to define the individual pieces of equipment that are available as resources and attach them to facilities or rooms.

To define equipment that can be used during a session:

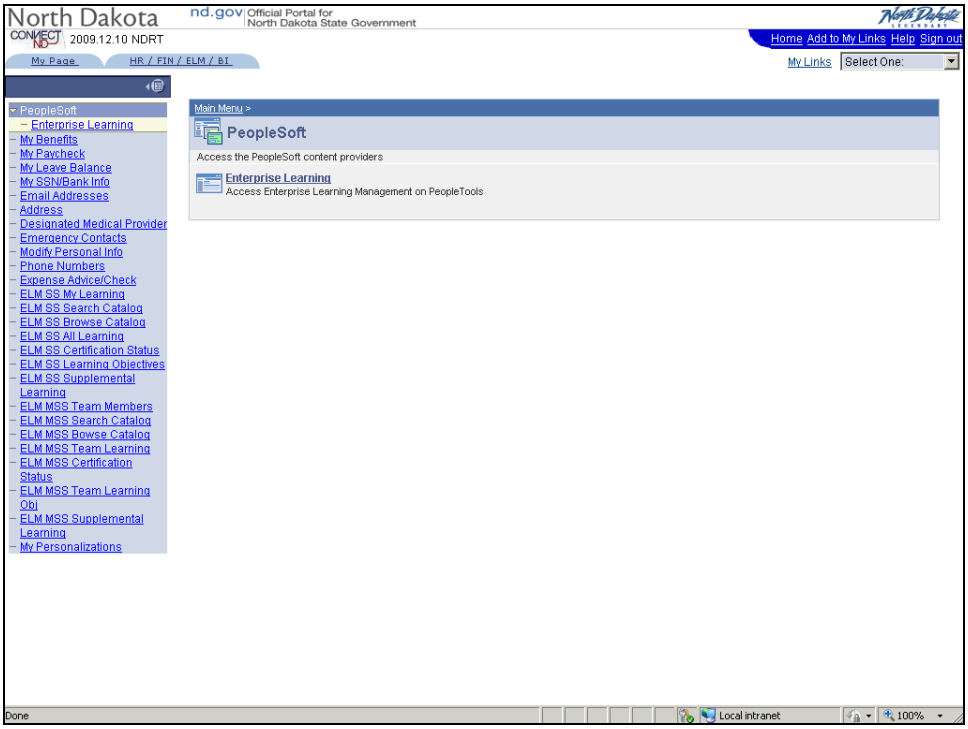
- Enter a description, equipment type, cost and other detailed information related to the piece of equipment.
- Add attachments, if needed.
- Select the learning environments to associate with the equipment.

Procedure

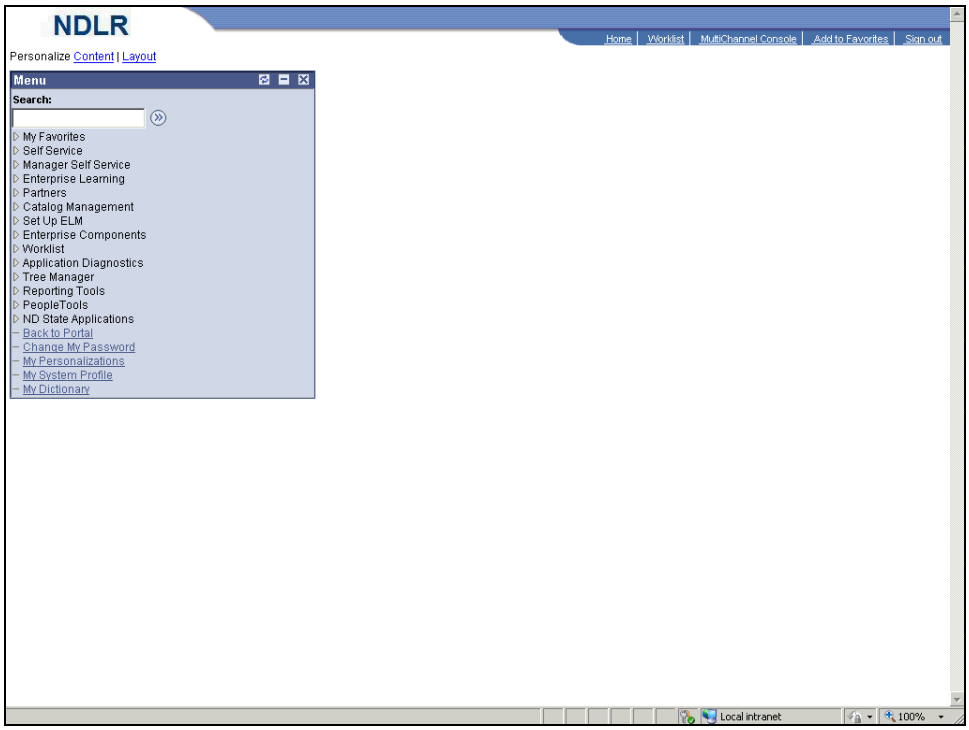
By the end of this topic, you will be able to:

- Navigate to the **Equipment** page.
- Define and add equipment to the system

Step	Action
1.	Begin by navigating to the **Equipment** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

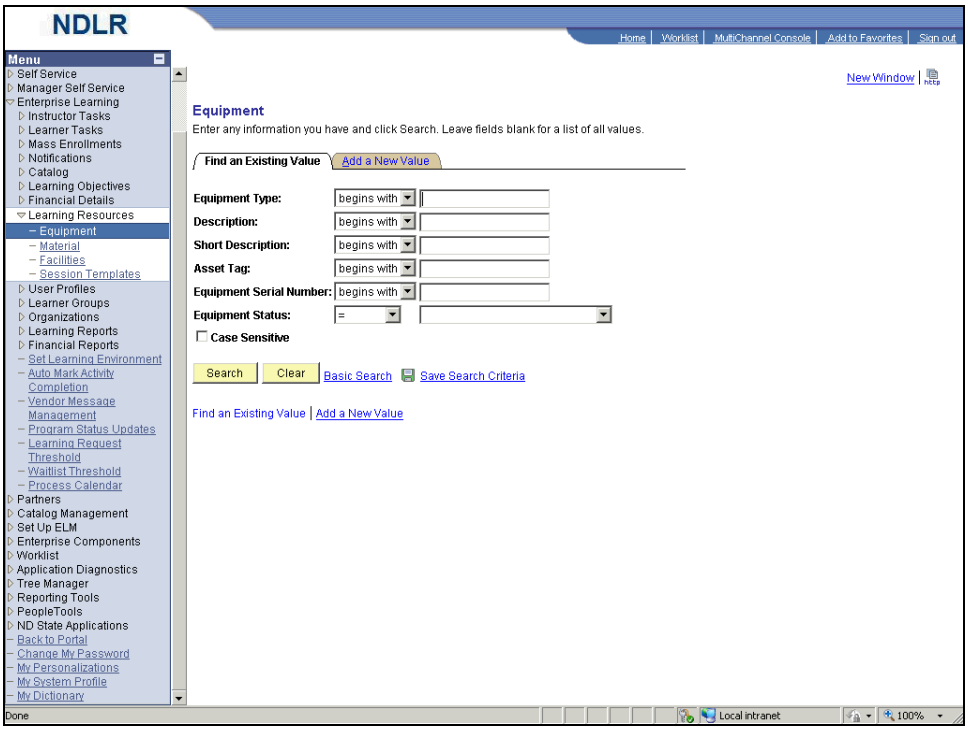


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

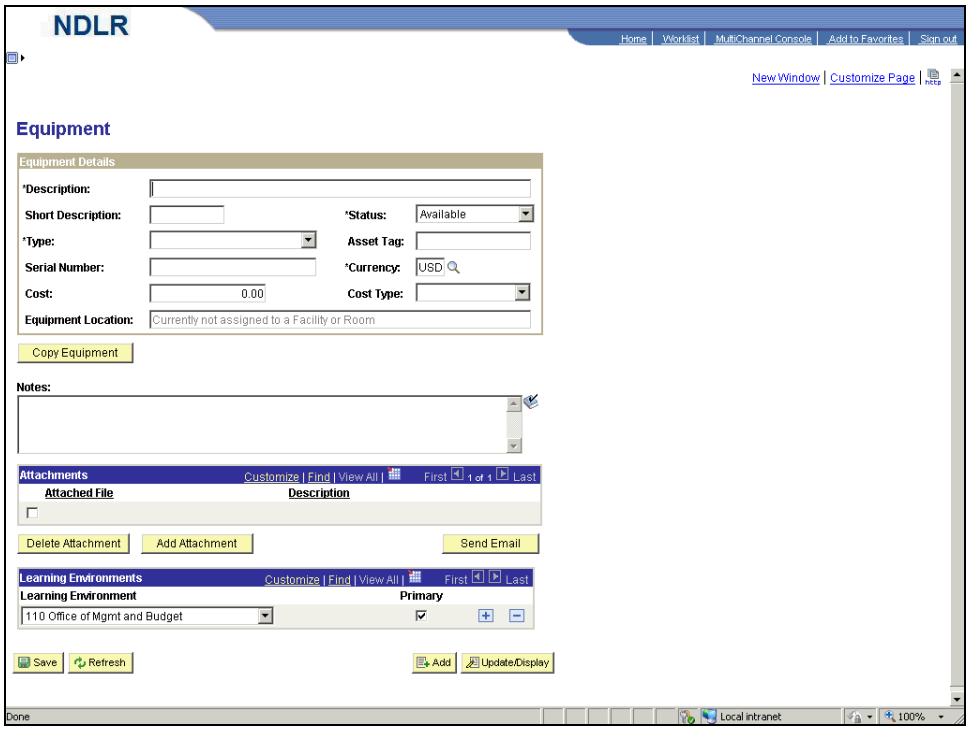


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

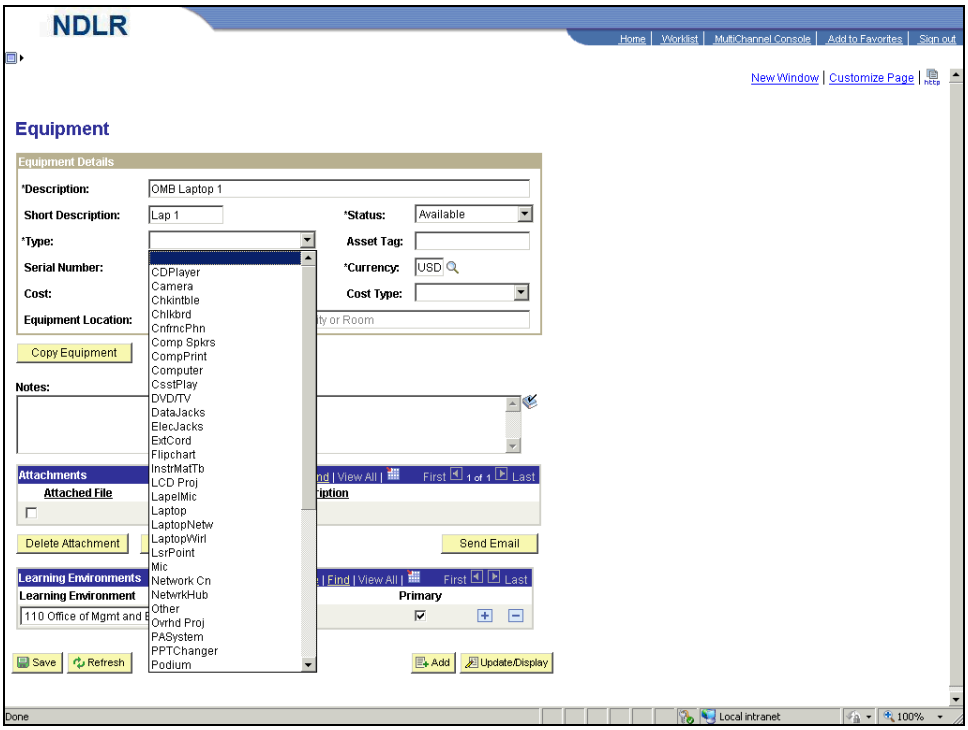
Step	Action
5.	Click the **Learning Resources** link. ▷ Learning Resources
6.	Click the **Equipment** link. – Equipment



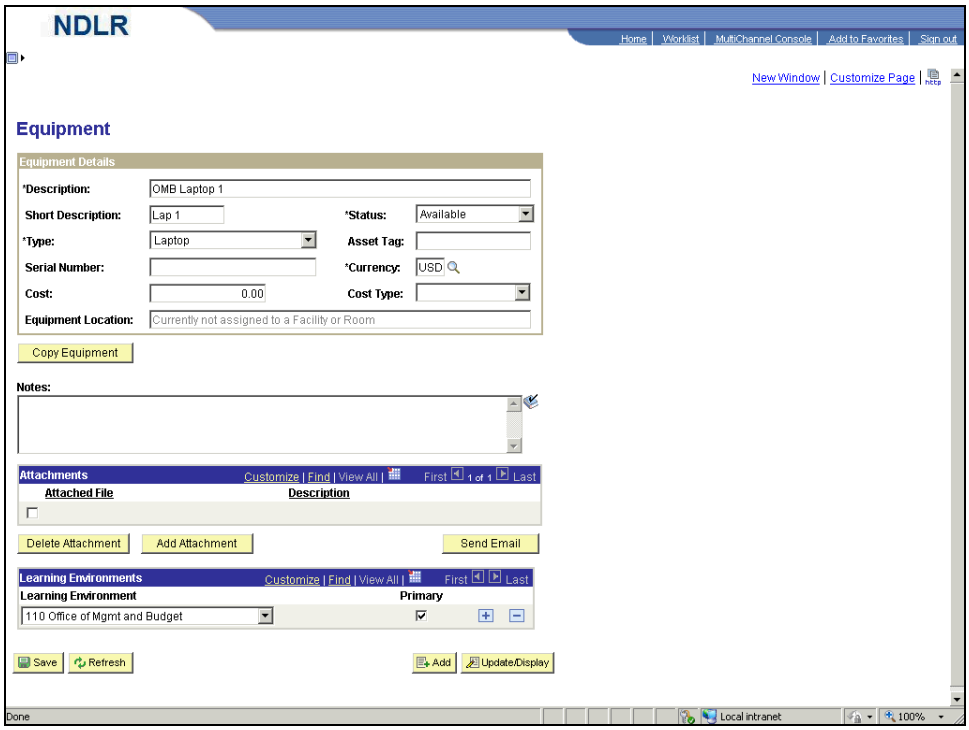
Step	Action
7.	Click the **Collapse Menu** button. ⊟
8.	Click the **Add a New Value** tab. Add a New Value
9.	Use the **Equipment** page to define equipment. You can supplement the definition with attachments such as manufacturer's user manuals. You can then assign the equipment to session templates, session patterns, facilities and rooms within facilities.
10.	The **Description** field allows you to define the piece of equipment you are entering in the system.



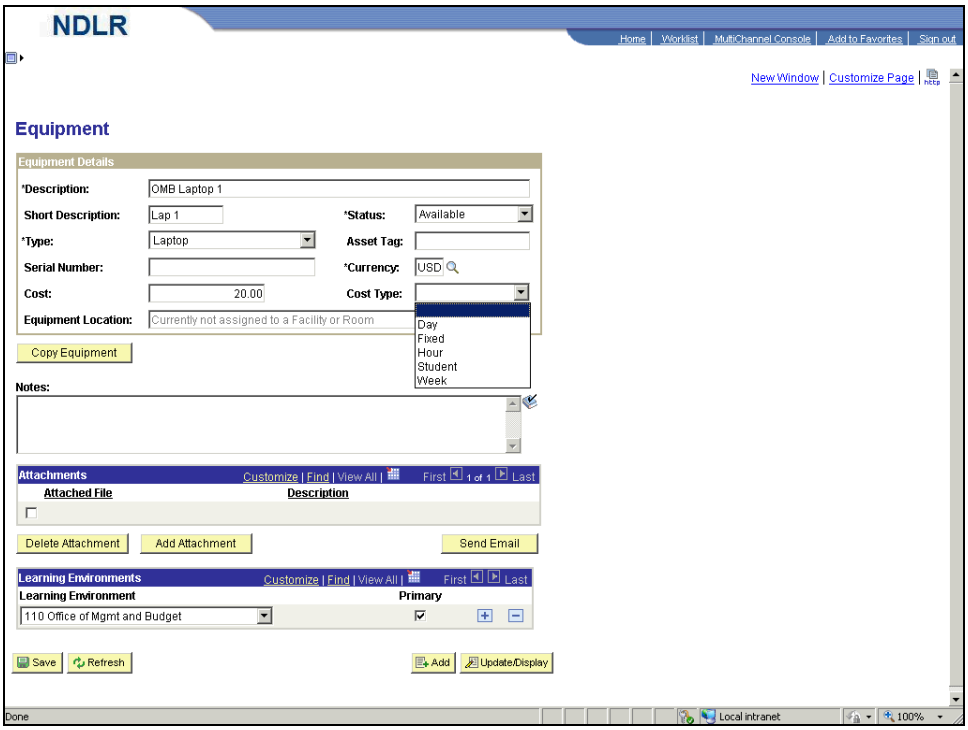
Step	Action
11.	Enter the desired information into the **Description** field. Enter "**OMB Laptop 1**".
12.	Click in the **Short Description** field.
13.	Enter the desired information into the **Short Description** field. Enter "**Lap 1**".
14.	The **Status** field is used to identify the availability of equipment. For this example, retain the default value.
15.	Click the **Type** drop-down list.



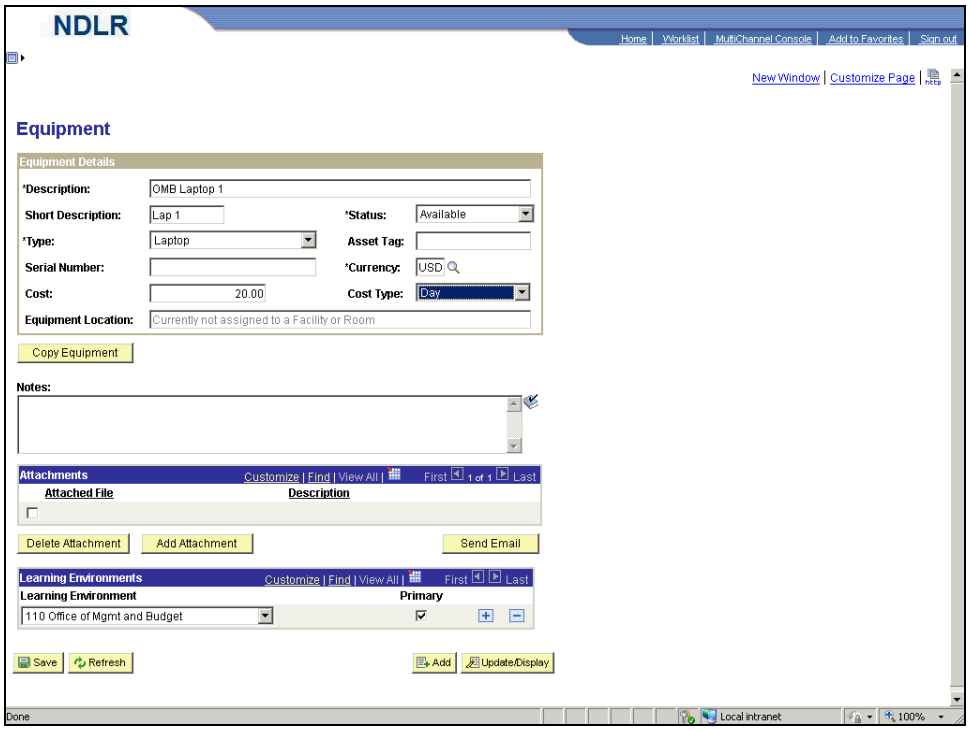
Step	Action
16.	Select the "**Laptop**" list item. Laptop
17.	The **Asset Tag** field is used to identify equipment in the system. This is a unique identifier that may be assigned by individual agencies.
18.	The **Serial Number** field is an identifying number for the asset. It could be the manufacturer's serial number or another number defined by individual agencies.
19.	The **Cost** field identifies the amount a piece of equipment will be expensed to a learning activity.



Step	Action
20.	Click in the **Cost** field. 0.00
21.	Press **[Delete]**.
22.	Enter the desired information into the **Cost** field. Enter "**20.00**".
23.	The **Cost Type** field identifies the frequency a piece of equipment will be expensed to a learning activity that uses it.
24.	Click the **Cost Type** drop-down list.



Step	Action
25.	Select the "**Day**" list item. Day
26.	The Administrator's **Learning Environment** will default as the primary environment. The Learning Environment controls who has access to this specific piece of equipment.



Step	Action
27.	Click the **Save** button.
28.	**Congratulations**! You should now be able to: - Navigate to the **Equipment** page. - Define and add equipment to the system **End of Procedure.**

2.2 Copying Equipment

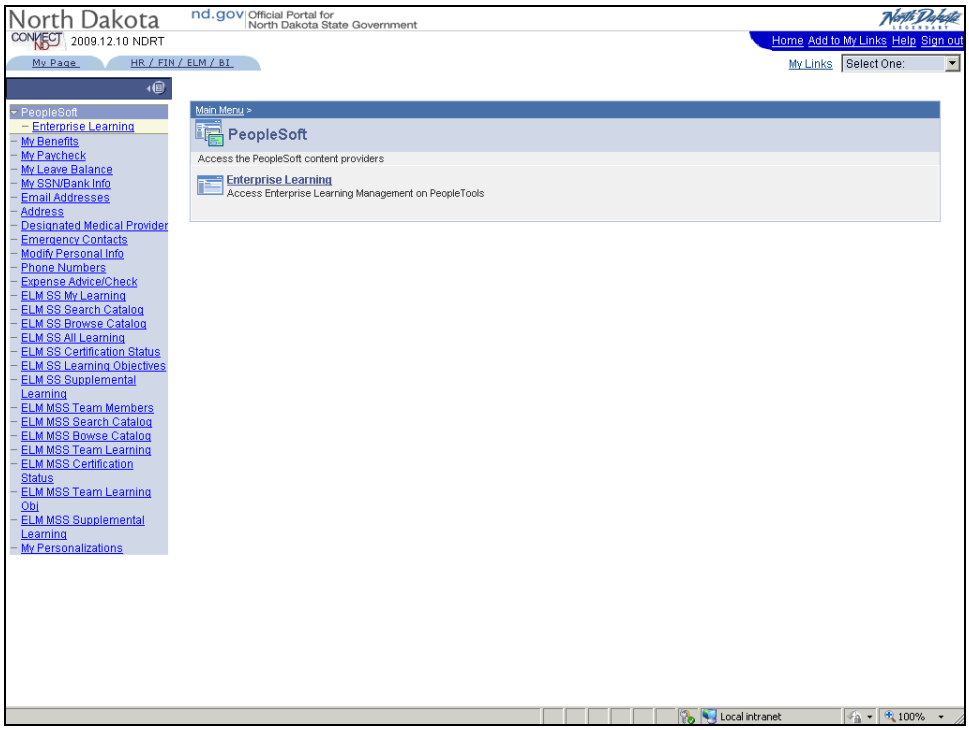
The **Enterprise Learning Management** copy functionality enables you to quickly create new equipment definitions that are similar to existing pieces of equipment already loaded in the system. When the system generates the copy, you can edit the information accordingly.

Procedure

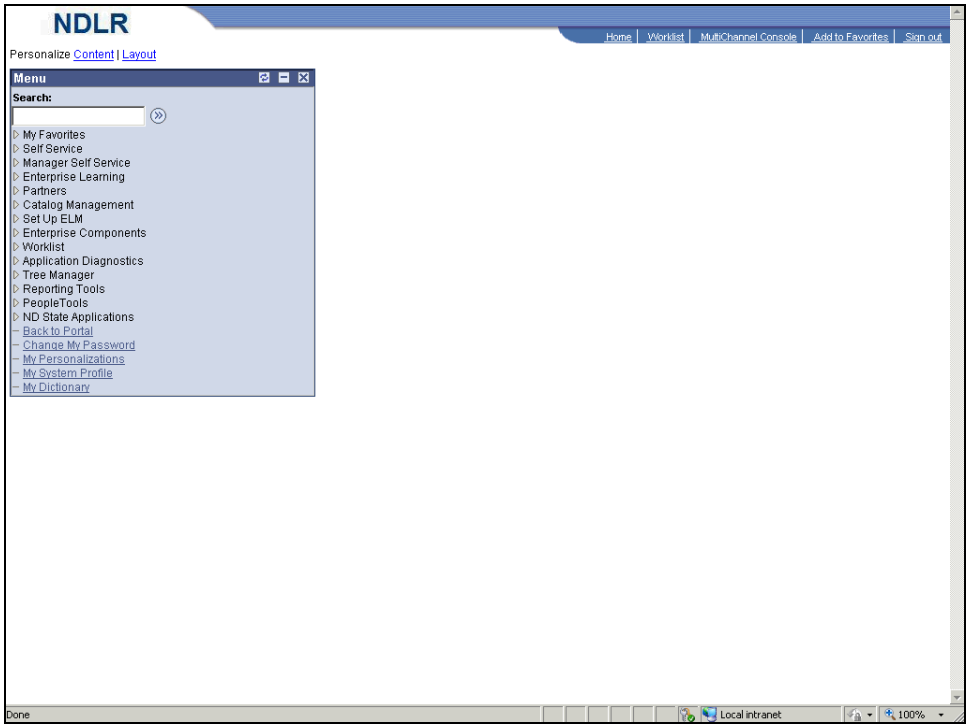
By the end of this topic, you will be able to:

- Navigate to the **Equipment** page.
- Copy an existing equipment definition.

Step	Action
1.	Begin by navigating to the **Equipment** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

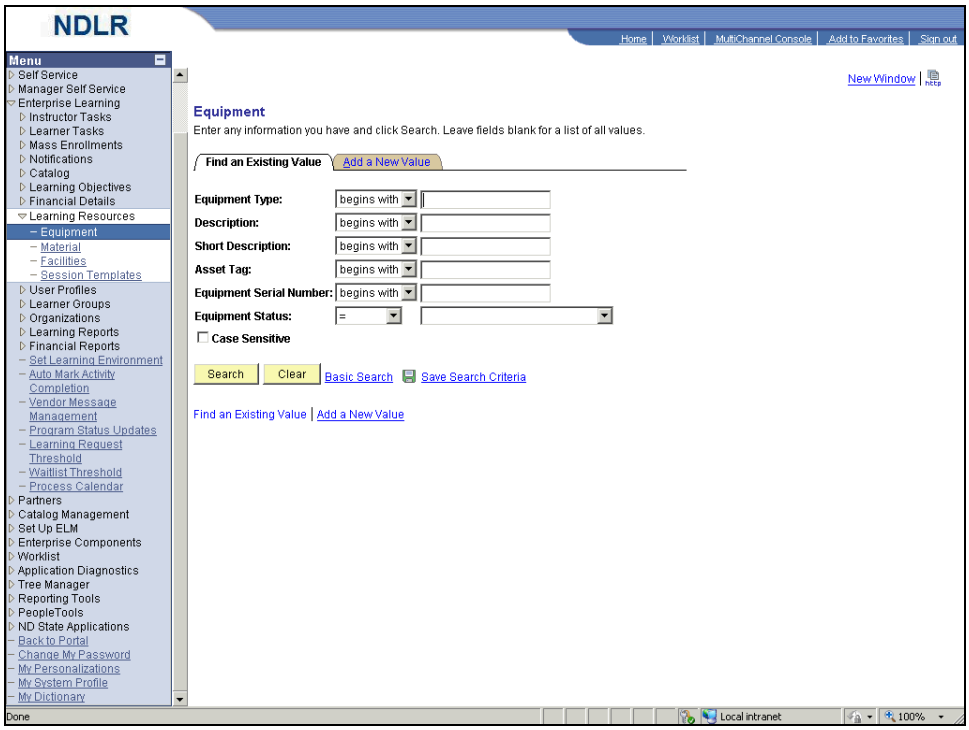


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

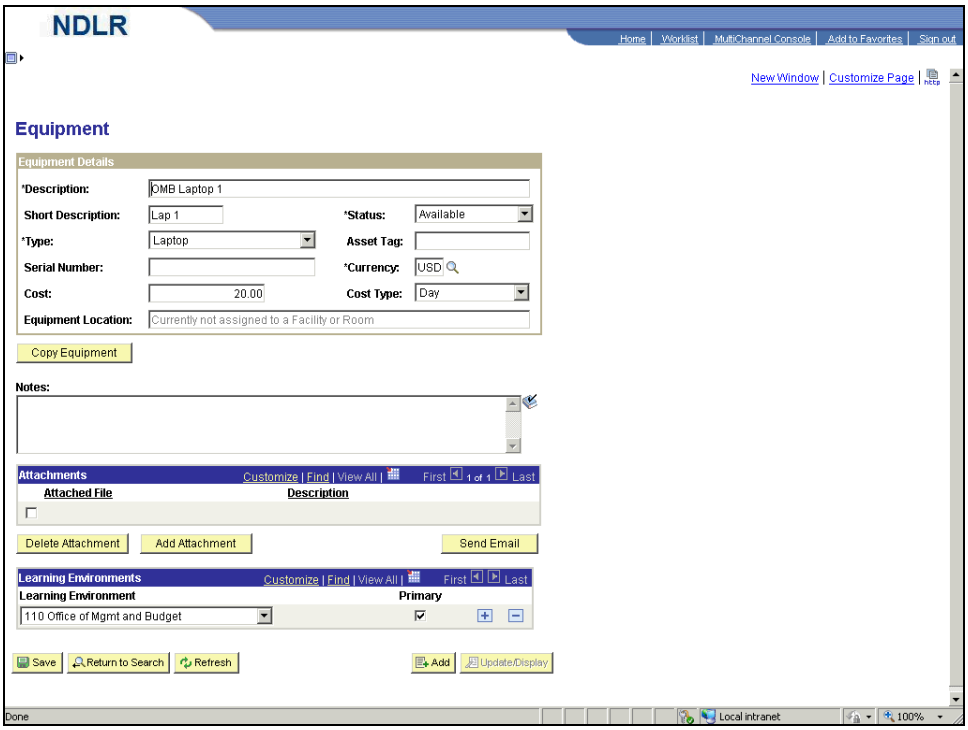


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

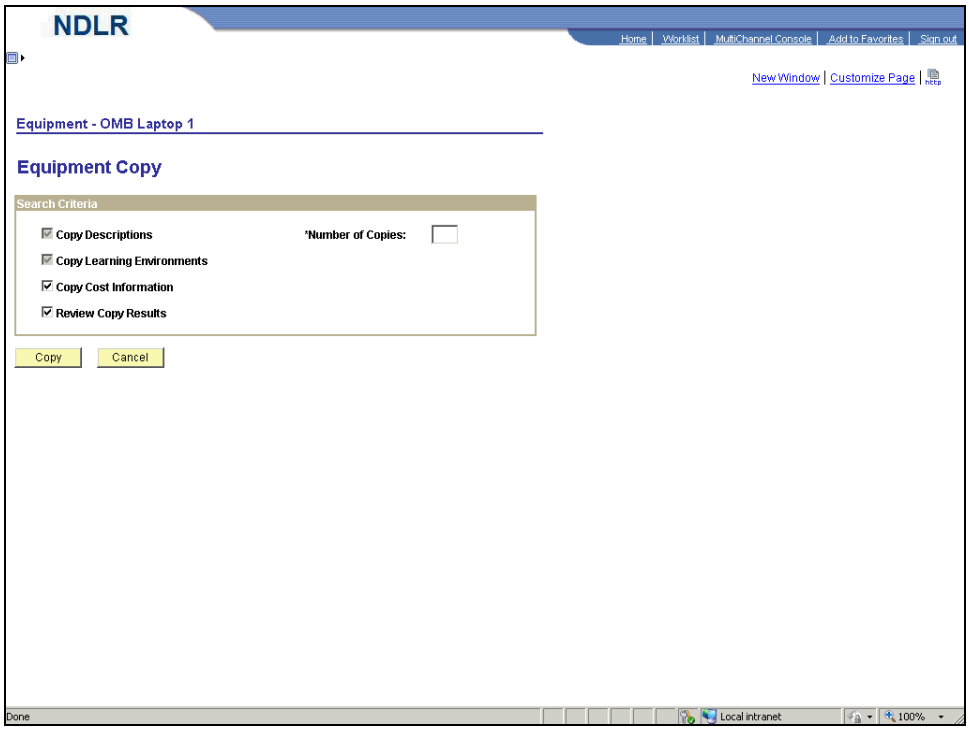
Step	Action
5.	Click the **Learning Resources** link. ▷ Learning Resources
6.	Click the **Equipment** link. – Equipment



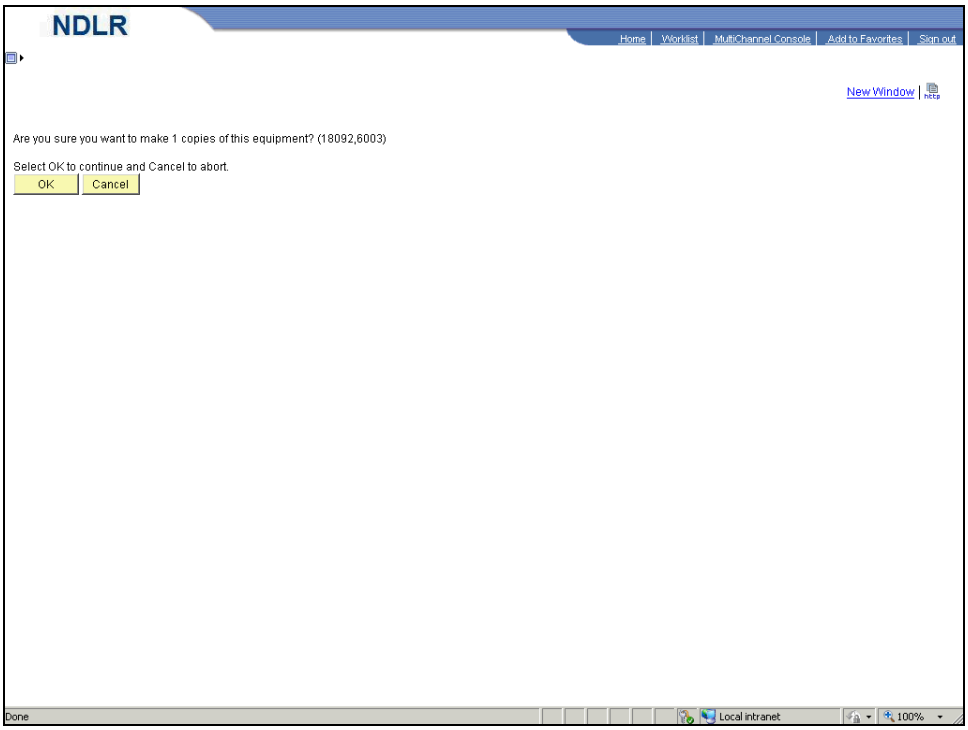
Step	Action
7.	Click the **Collapse Menu** button.
8.	Click in the **Description** field.
9.	Enter the desired information into the **Description** field. Enter "**OMB Laptop 1**".
10.	Click the **Search** button. Search
11.	Use the **Equipment** page to define equipment by equipment types that you have created. You can supplement the definition with attachments such as manufacturer's user manuals. You can then assign the equipment to session templates, session patterns, facilities and rooms within facilities.



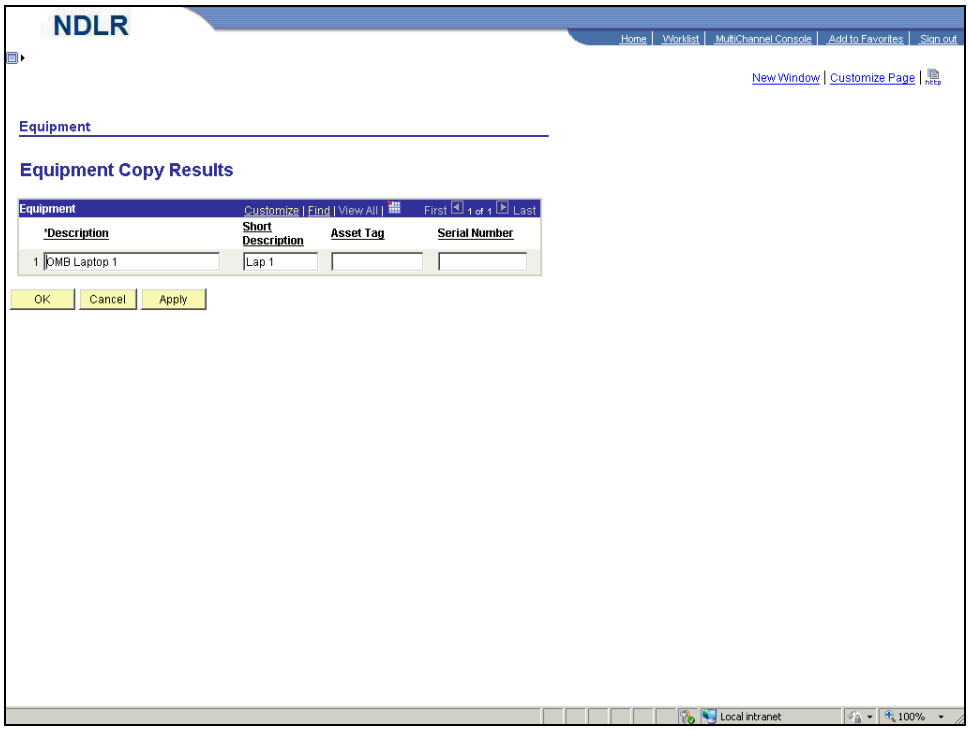
Step	Action
12.	Click the **Copy Equipment** button. Copy Equipment
13.	Use the **Equipment Copy** page to copy an existing piece of equipment to a specified number of new copies.



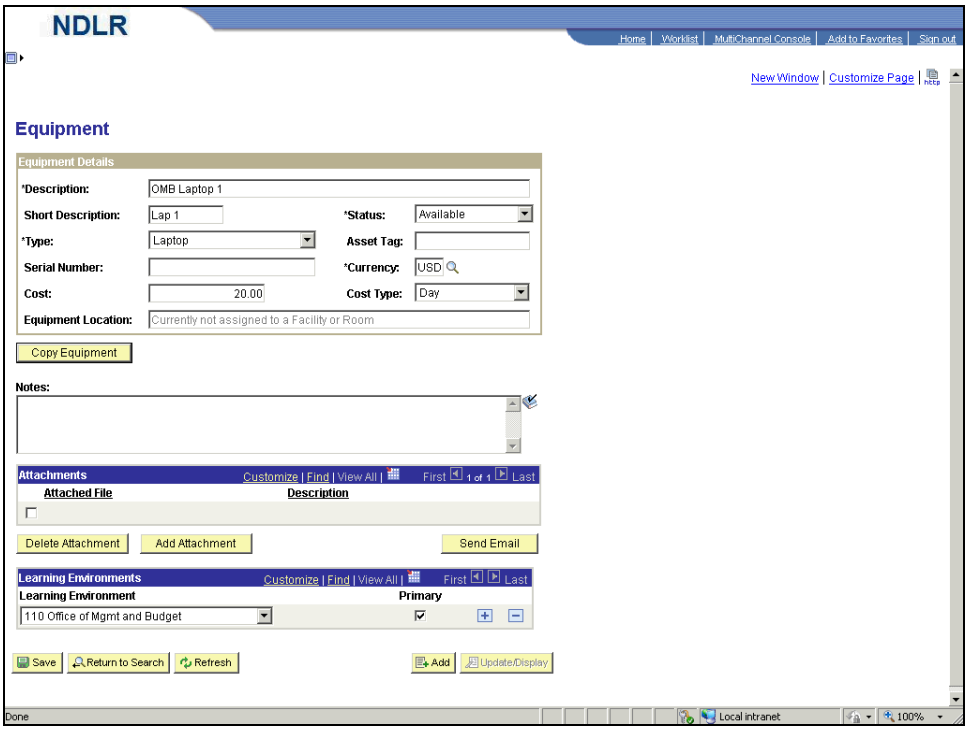
Step	Action
14.	Click in the **Number of Copies** field.
15.	Enter the desired information into the **Number of Copies** field. Enter "**1**".
16.	Click the **Copy** button. Copy



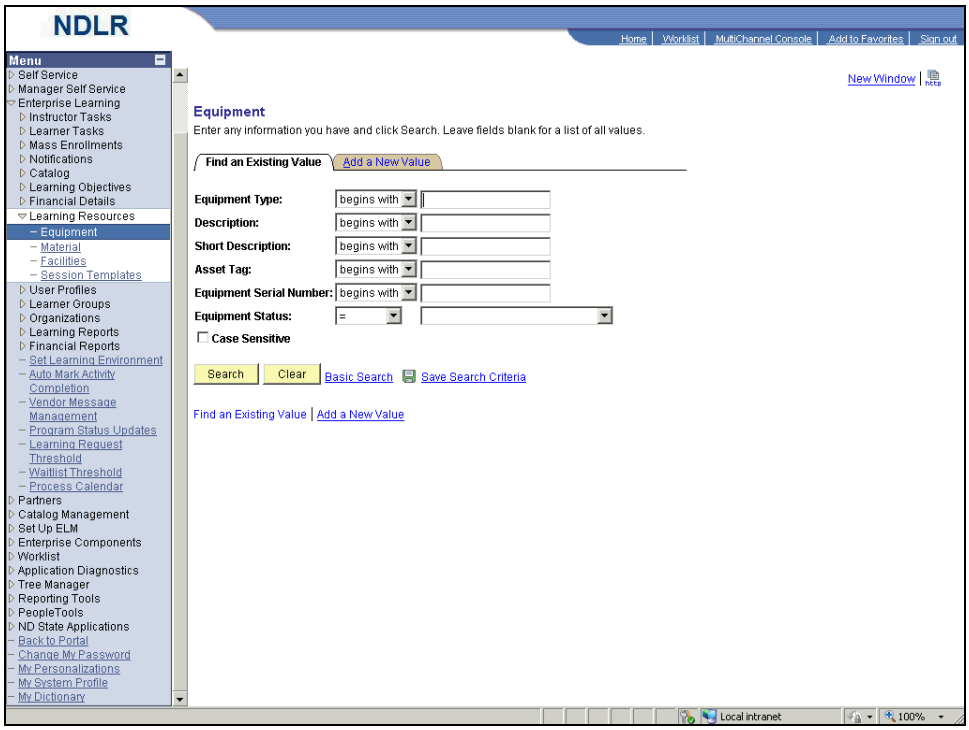
Step	Action
17.	Click the **OK** button. OK
18.	Use the **Equipment Copy Results** page to modify the equipment details for the new copy.



Step	Action
19.	Click in the **Description** field. OMB Laptop 1
20.	Press **[Delete]**.
21.	Enter the desired information into the **Description** field. Enter "**OMB Laptop 2**".
22.	Click in the **Short Description** field. Lap 1
23.	Press **[Delete]**.
24.	Enter the desired information into the **Short Description** field. Enter "**Lap 2**".
25.	Click the **OK** button. OK



Step	Action
26.	Click the **Save** button.
27.	Now, search for the equipment to verify the copy was created.
28.	Click the **Expand Menu** button.
29.	Click the **Equipment** link.



Step	Action
30.	Click the **Collapse Menu** button.
31.	Click in the **Short Description** field.
32.	Enter the desired information into the **Short Description** field. Enter "**Lap**".
33.	Click the **Search** button. Search
34.	Notice the **Search Results** list displays the original piece of equipment along with the new piece of equipment.
35.	**Congratulations**! You should now be able to: - Navigate to the **Equipment** page. - Copy an existing equipment definition. **End of Procedure.**

2.3 Defining Materials

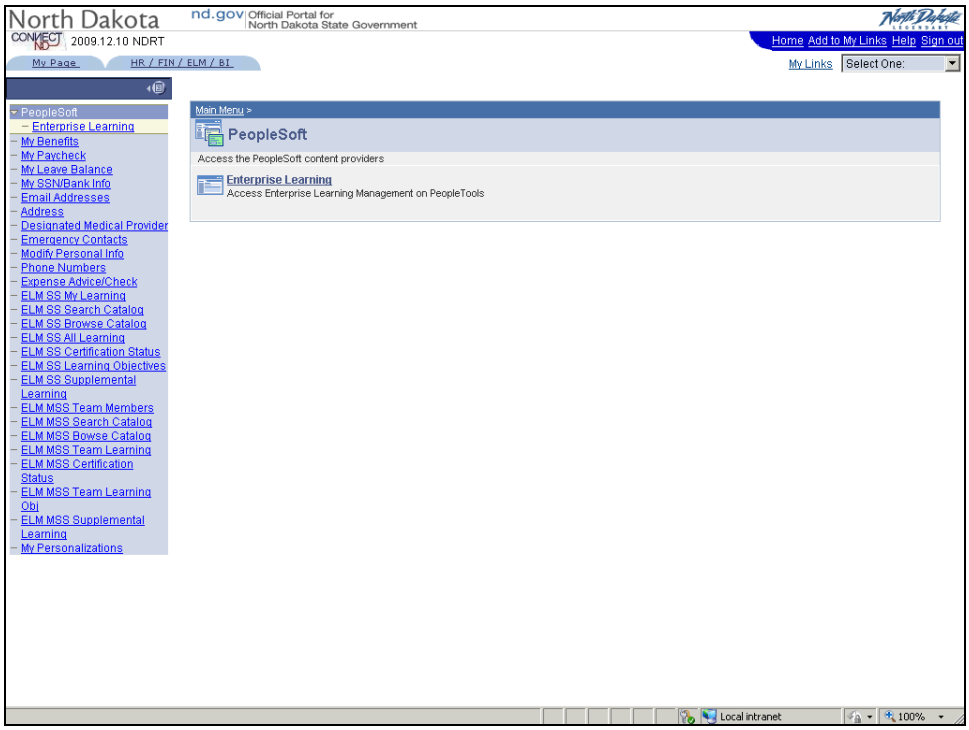
Enterprise Learning Management enables you to attach materials to self-paced and scheduled activities.

Procedure

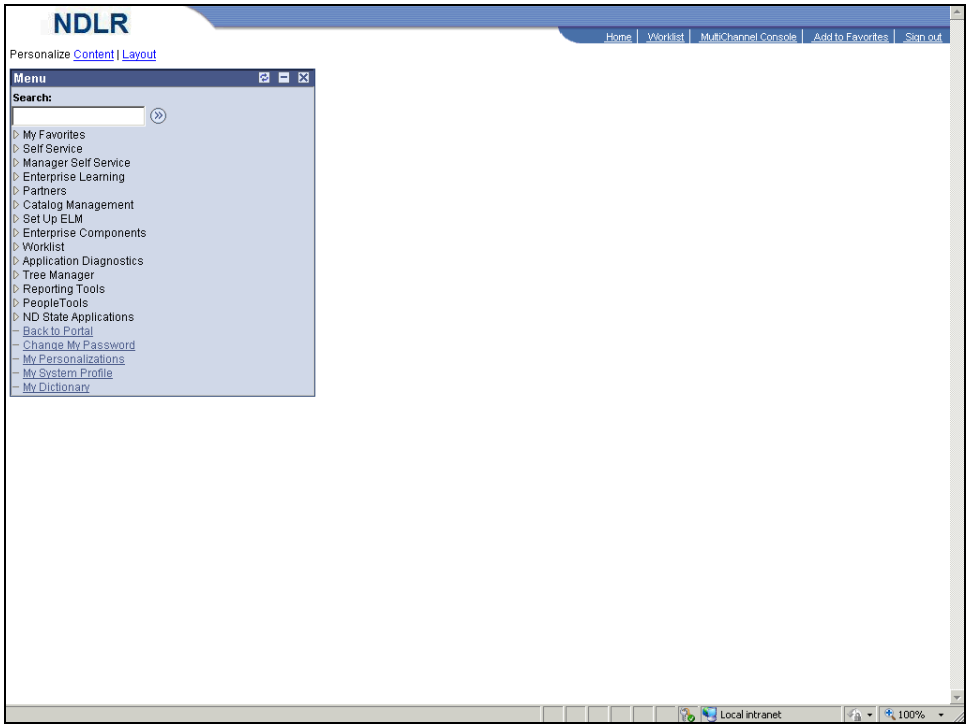
By the end of this topic, you will be able to:

- Navigate to the **Material** page.
- Define materials in the system to associate with learning activities.

Step	Action
1.	Begin by navigating to the **Material** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

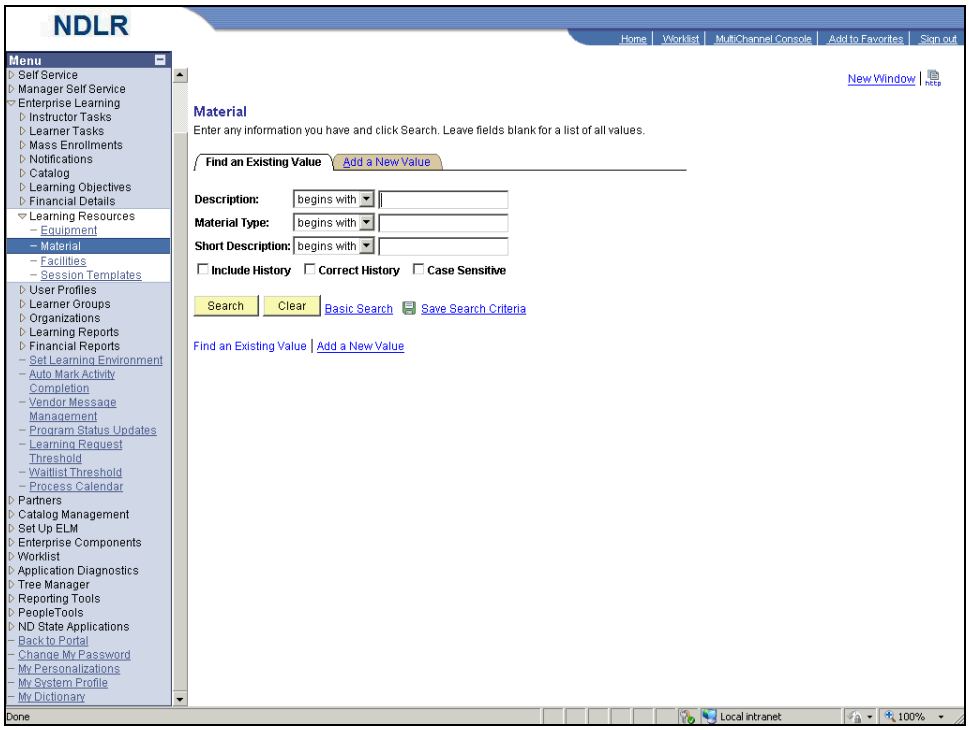


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

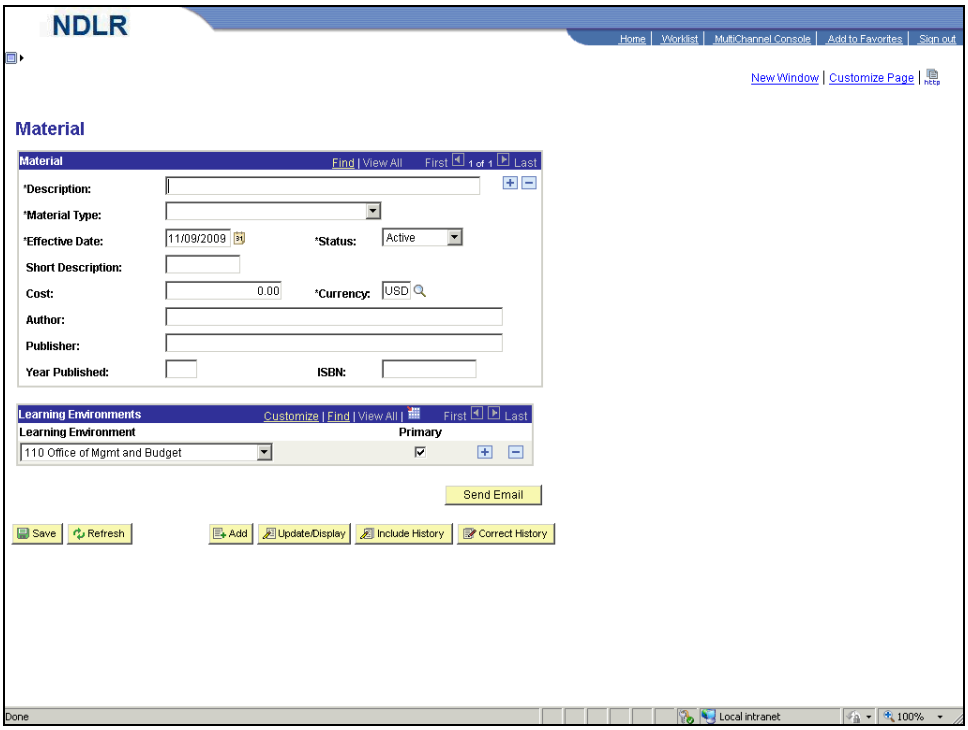


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

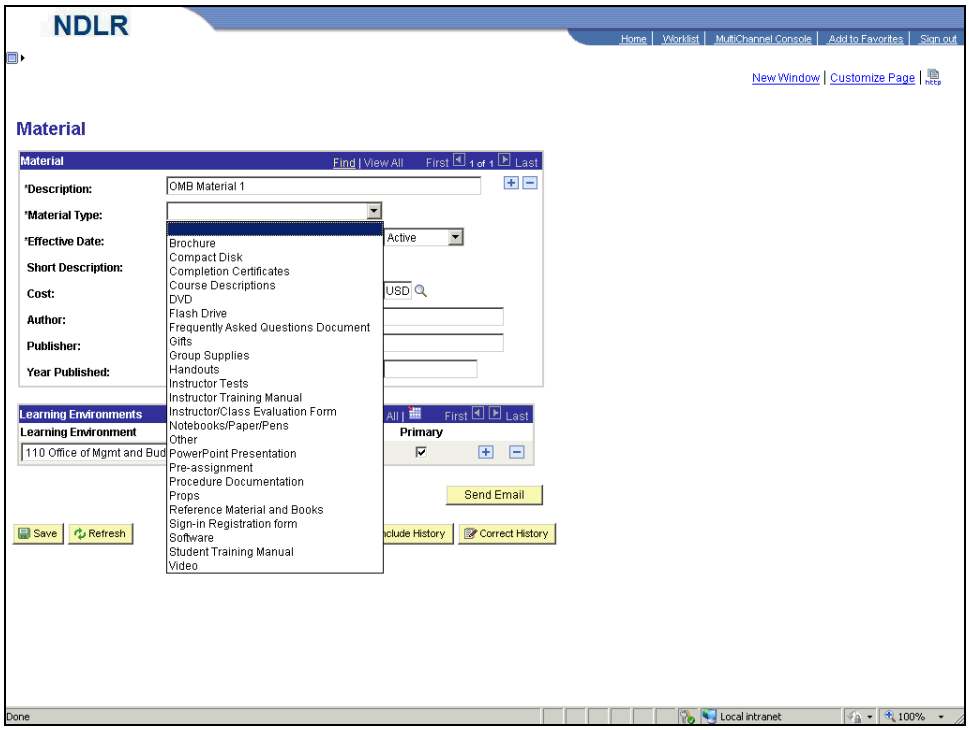
Step	Action
5.	Click the **Learning Resources** link. ▷ Learning Resources
6.	Click the **Material** link. – Material



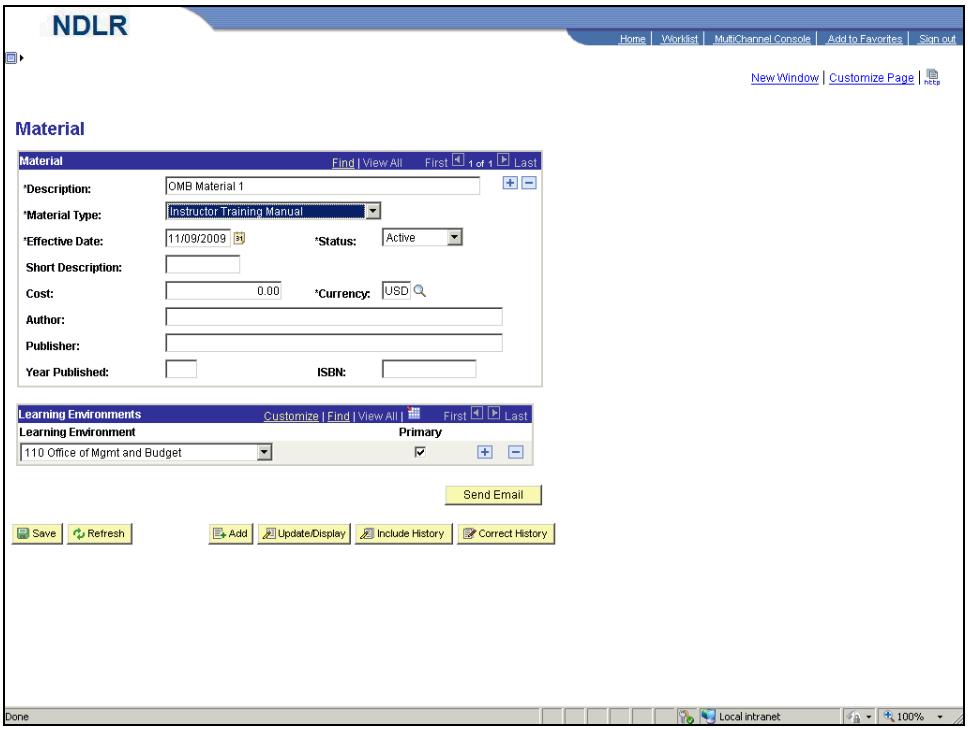
Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Add a New Value** tab. Add a New Value
9.	Use the **Material** page to define materials that can be associated with a learning activity.
10.	The **Description** field is used to define materials entered into the system.



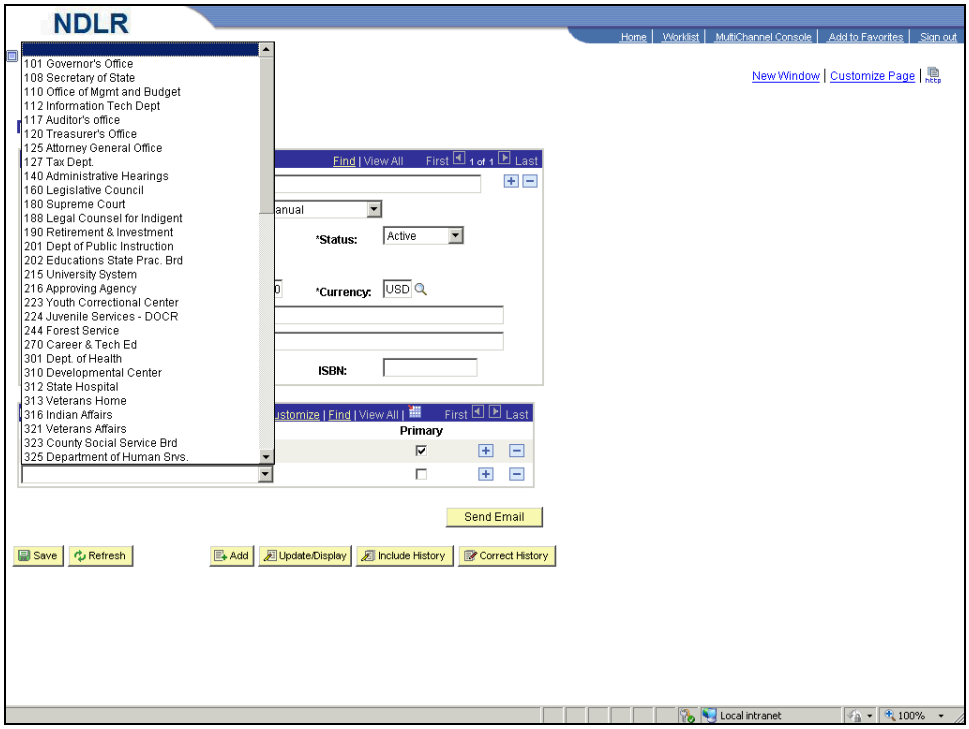
Step	Action
11.	Enter the desired information into the **Description** field. Enter "**OMB Material 1**".
12.	Click the **Material Type** drop-down list.



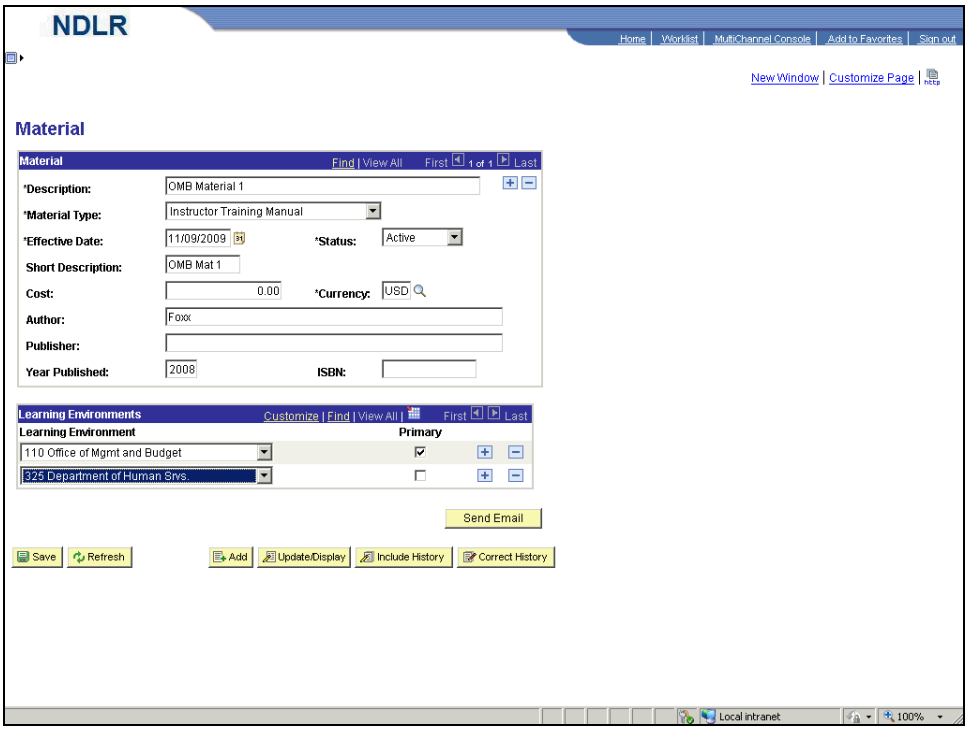
Step	Action
13.	Select the "**Instructor Training Manual**" list item. Instructor Training Manual
14.	The **Effective Date** defines when materials become active or inactive. For example, materials can be updated and the old materials can be made inactive. For this example, retain the default date.
15.	The **Status** field indicates whether materials are active or inactive. For example, materials can be updated and the status for the old materials can be changed to inactive. For this example, retain the default value.



Step	Action
16.	Click in the **Short Description** field.
17.	Enter the desired information into the **Short Description** field. Enter "**OMB Mat 1**".
18.	The **Cost** field indicates the per unit cost of the material. When the material is associated with a learning activity, this cost is used to calculate the overall cost of the activity.
19.	Click in the **Author** field.
20.	Enter the desired information into the **Author** field. Enter "**Foxx**".
21.	Click in the **Year Published** field.
22.	Enter the desired information into the **Year Published** field. Enter "**2008**".
23.	Click the **Add a new row** button.
24.	Click the **Learning Environment** drop-down list.



Step	Action
25.	Select the "**325 Department of Human Srvs.**" list item. 325 Department of Human Srvs.
26.	Adding Department of Human Srvs as a Learning Environment authorizes them to view and use this specific material (Instructor Training Manual).



Step	Action
27.	Click the **Save** button. Save
28.	**Congratulations**! You should now be able to: - Navigate to the **Material** page. - Define materials in the system to associate with learning activities. **End of Procedure.**

2.4 Defining Facilities and Rooms

When you schedule sessions for an activity, you specify the facility in which the activity's sessions takes place.

Defining a facility has three parts. You need to define:

- Basic facility-wide information such as: address, contact and attachments.
- The facility's room, identifying their location by building and floor and the equipment that is provided in each room.
- The facility's equipment inventory from which items can be allocated for a scheduled activity.

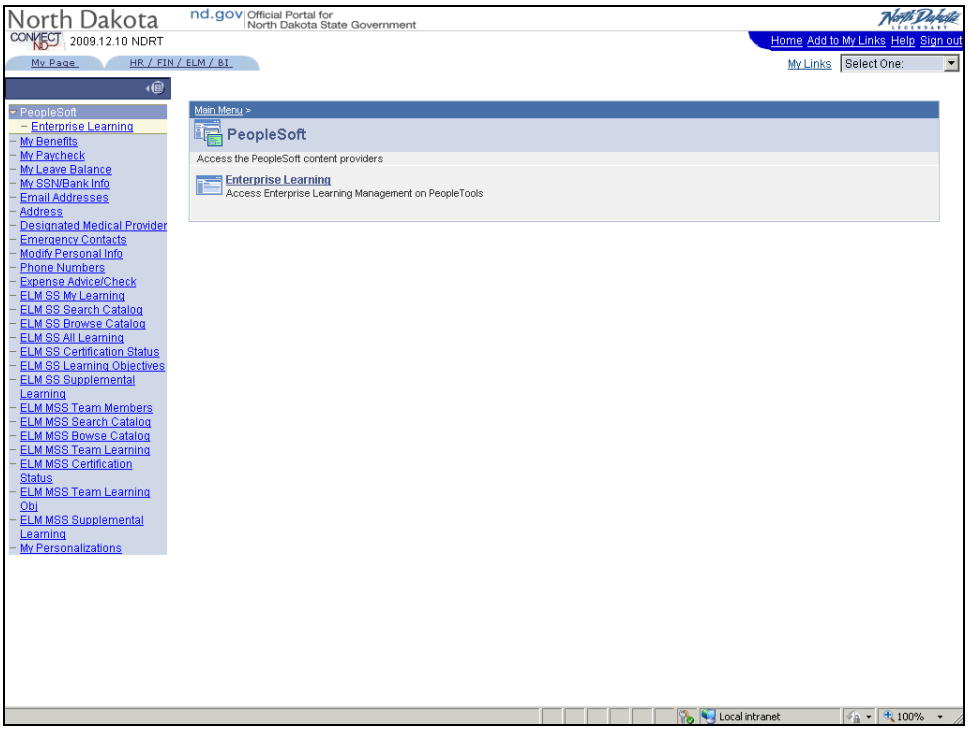
Associating a room with a facility enables you to manage your learning resources and allocate costs to learning activities.

Procedure

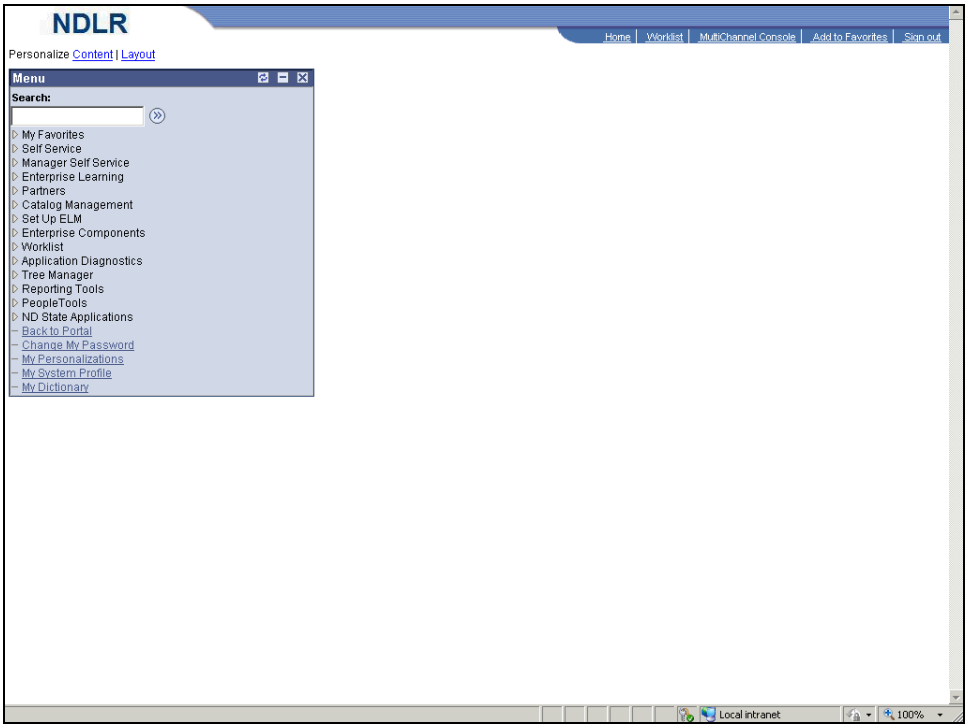
By the end of this topic, you will be able to:

- Navigate to the **Facility** page.
- Define a facility.
- Define a room within a facility.

Step	Action
1.	Begin by navigating to the **Facility** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

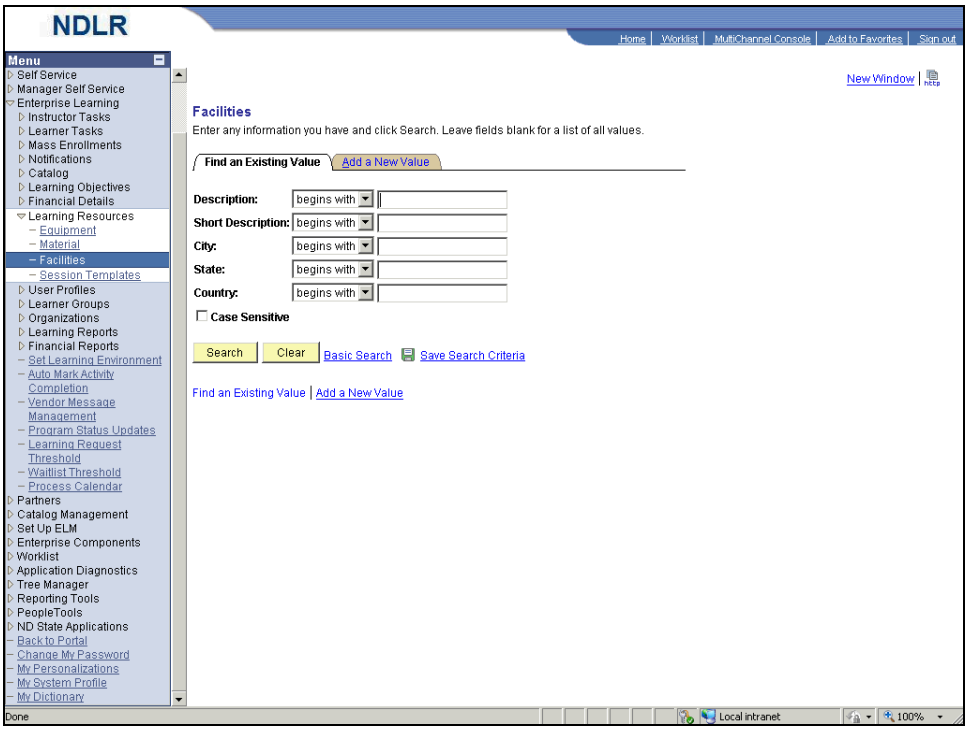


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

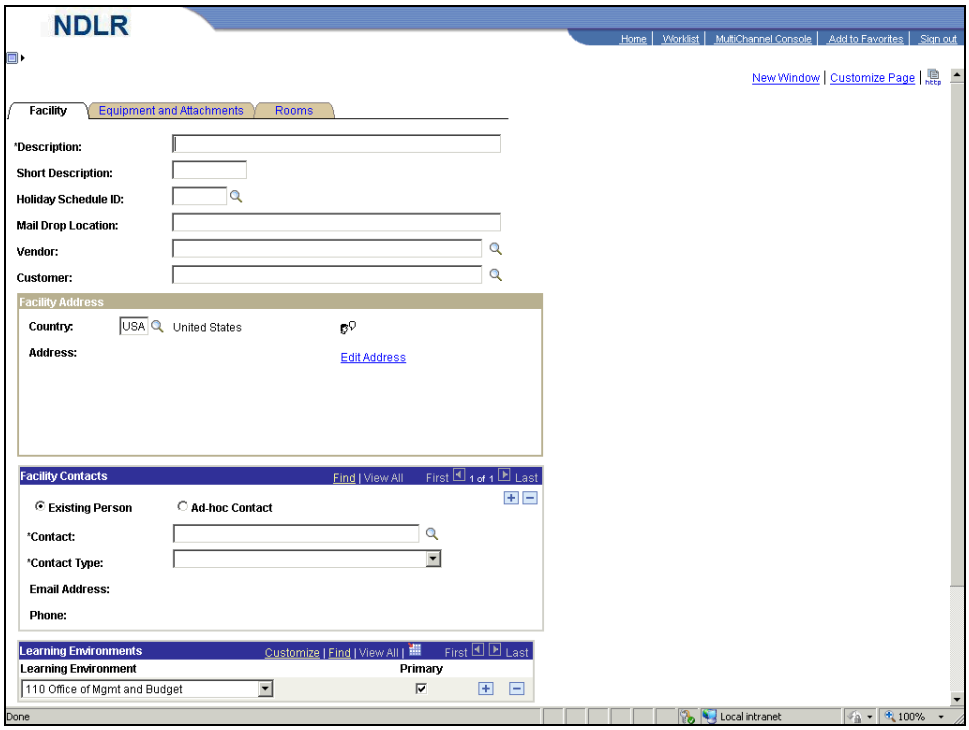


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

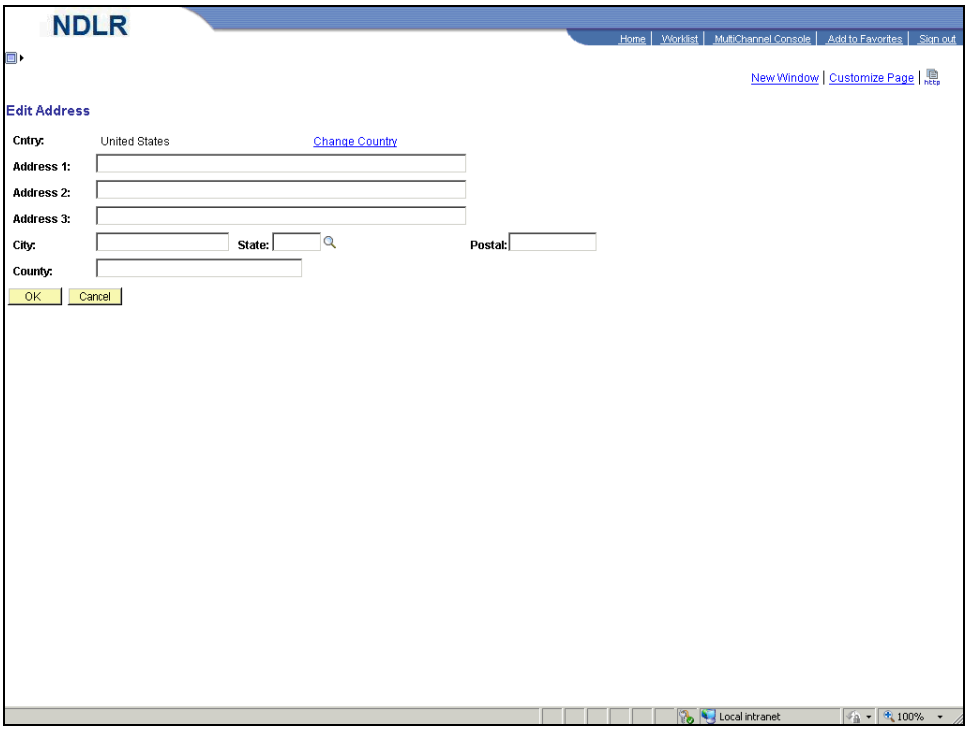
Step	Action
5.	Click the **Learning Resources** link. ▷ Learning Resources
6.	Click the **Facilities** link. – Facilities



Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Add a New Value** tab. Add a New Value
9.	The **Facility** page is used to define or modify a building that can be associated with a learning activity. By defining the building you can assign a cost of using the facility to the learning activity that uses it.

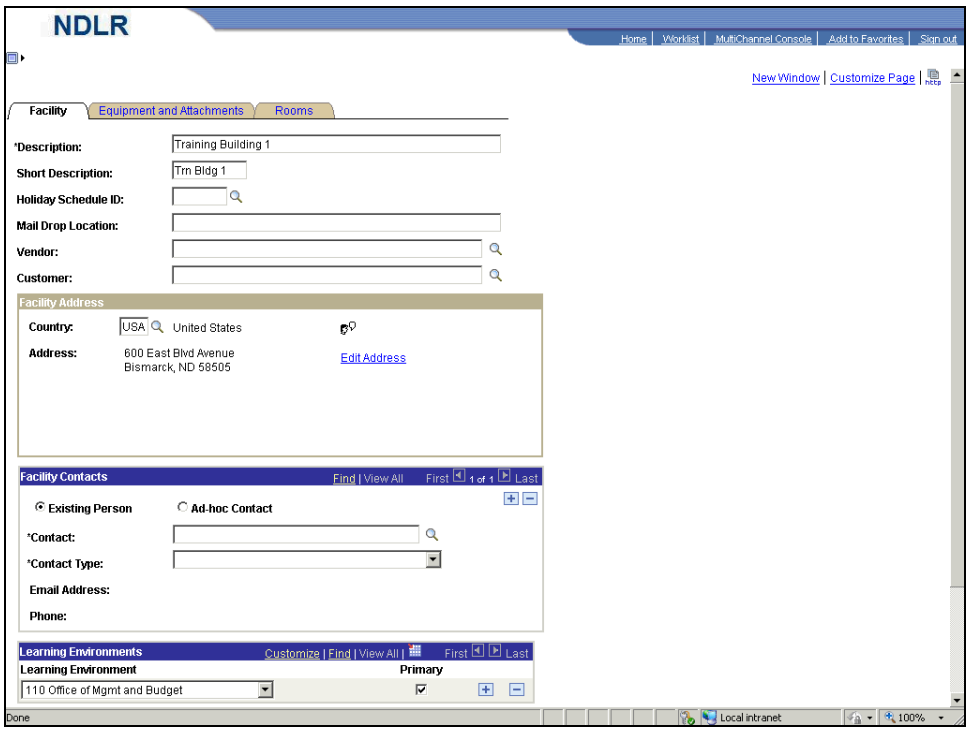


Step	Action
10.	Enter the desired information into the **Description** field. Enter "**Training Building 1**".
11.	Click in the **Short Description** field.
12.	Enter the desired information into the **Short Description** field. Enter "**Trn Bldg 1**".
13.	The **Holiday Schedule ID** field defines the holidays that are recognized at a facility. This identifies the days that a facility will be closed and learning activities cannot be scheduled.
14.	Click the **Edit Address** link. Edit Address
15.	Use the **Edit Address** page to define the address.

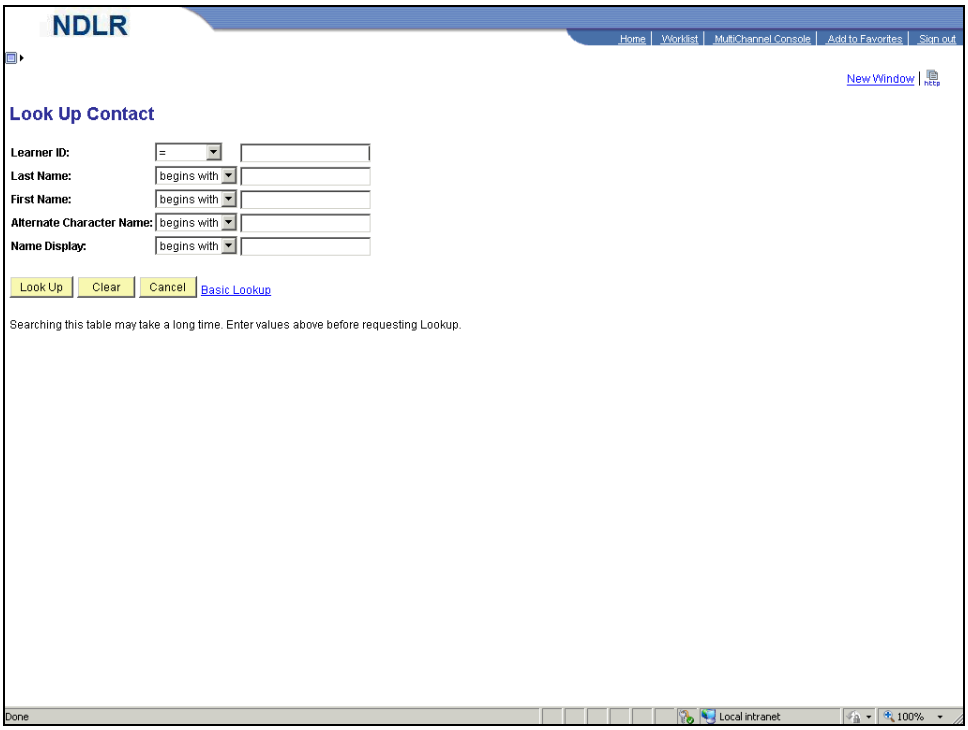


Step	Action
16.	Click in the **Address 1** field.
17.	Enter the desired information into the **Address 1** field. Enter "**600 East Blvd Avenue**".
18.	Click in the **City** field.
19.	Enter the desired information into the **City** field. Enter "**Bismarck**".
20.	Click in the **State** field.
21.	Enter the desired information into the **State** field. Enter "**ND**".
22.	Click in the **Postal** field.
23.	Enter the desired information into the **Postal** field. Enter "**58505**".
24.	Click the **OK** button. OK

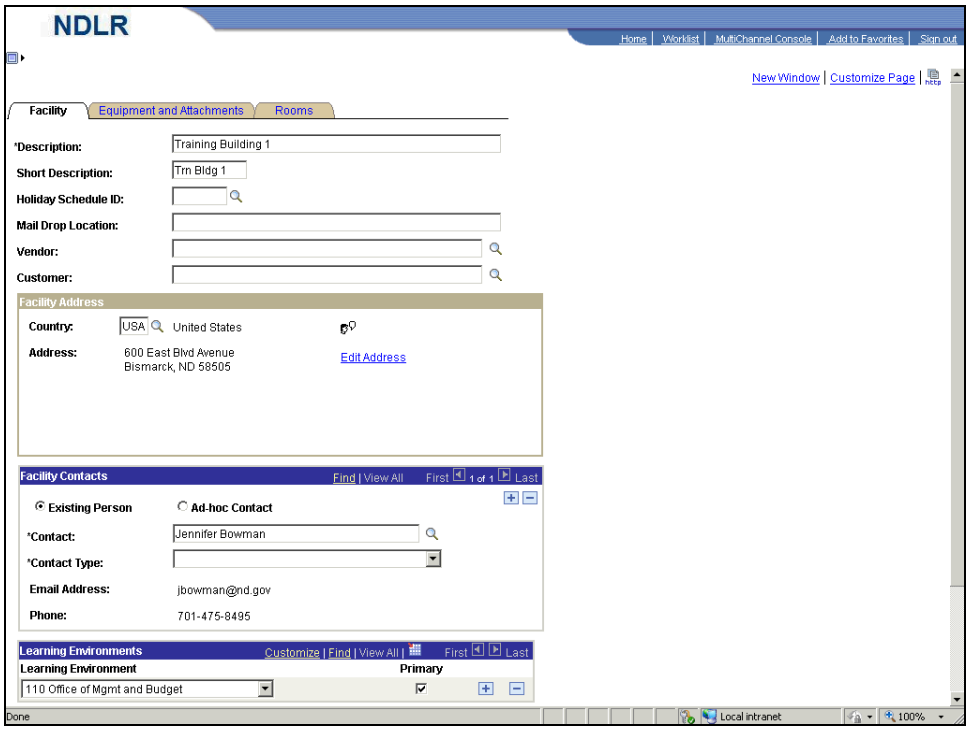
Step	Action
25.	The **Facility Contacts** section identifies who to contact with issues regarding a facility. **Note**: A facility can have multiple contacts and contact types.



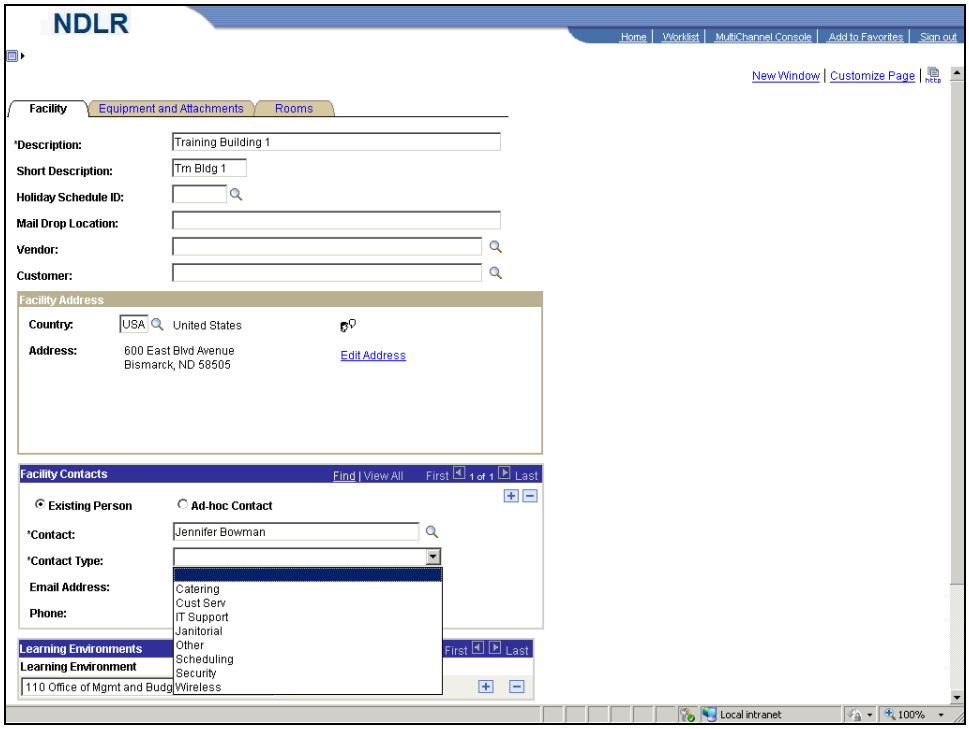
Step	Action
26.	Click the **Contact Lookup** button.



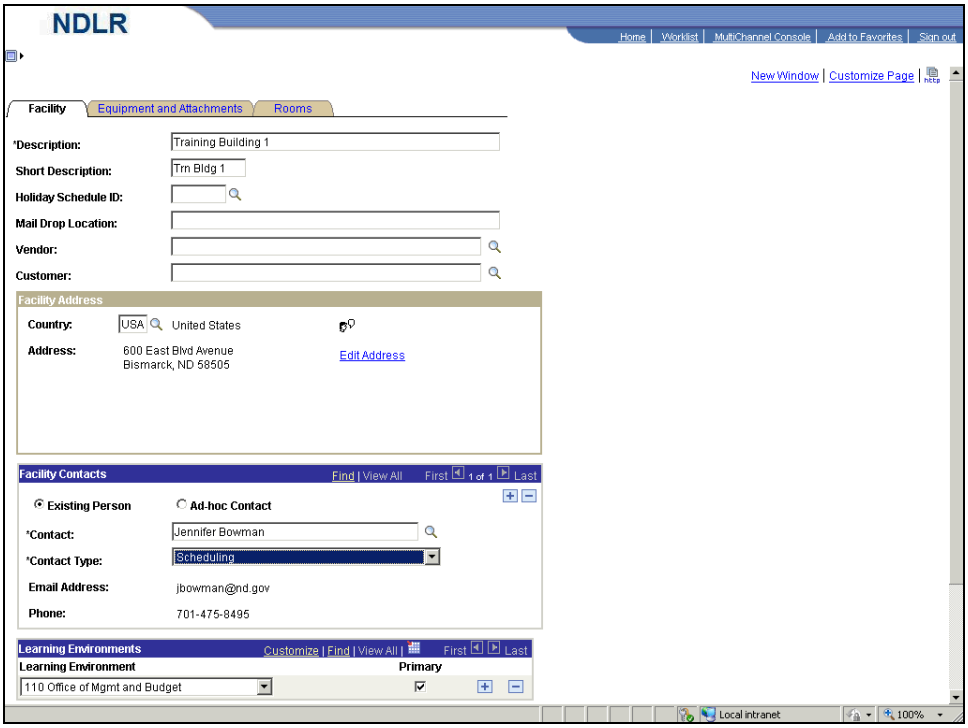
Step	Action
27.	Click in the **Last Name** field.
28.	Enter the desired information into the **Last Name** field. Enter "**Bowman**".
29.	Click the **Look Up** button. Look Up
30.	Select the "**JENNIFER**" list item.
31.	Use the **Contact Type** field to define the area of contact responsibility.



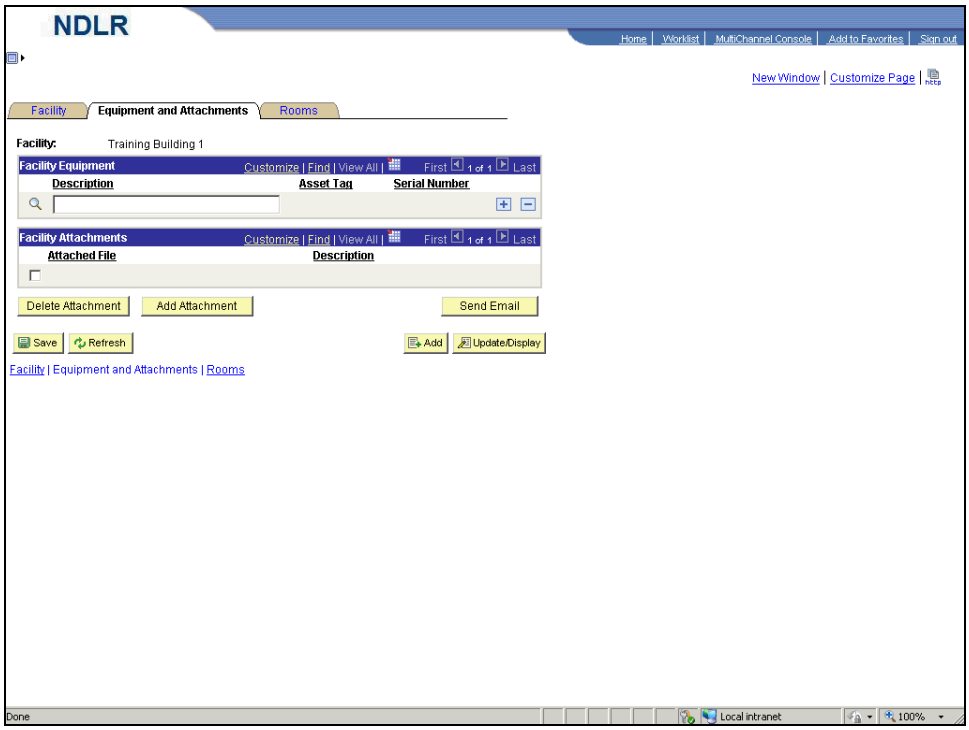
Step	Action
32.	Click the **Contact Type** drop-down list.



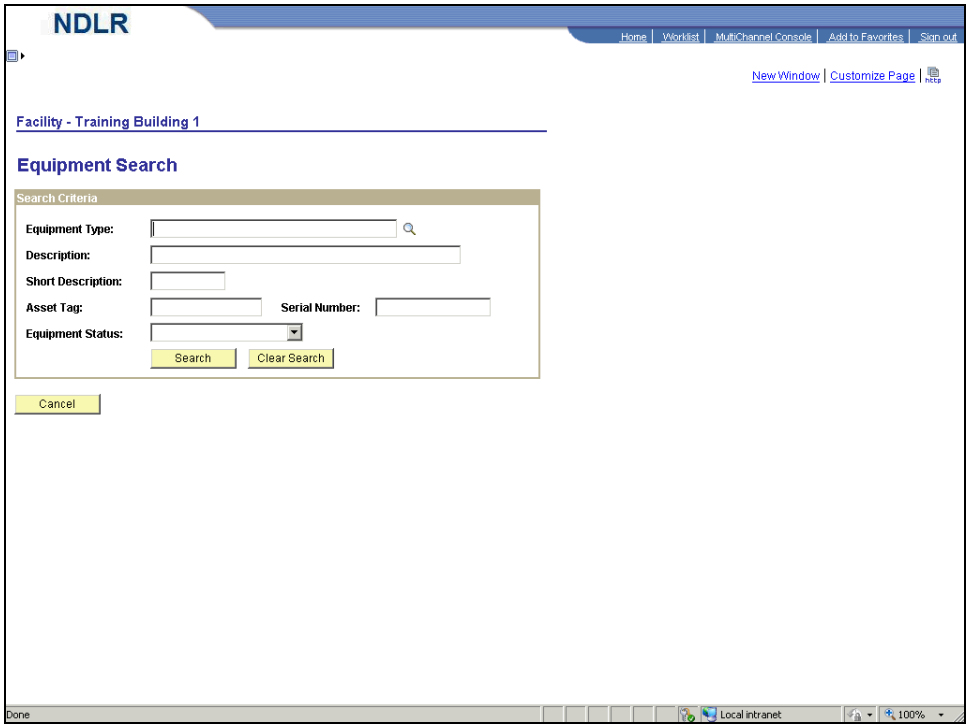
Step	Action
33.	Select the "**Scheduling**" list item. Scheduling



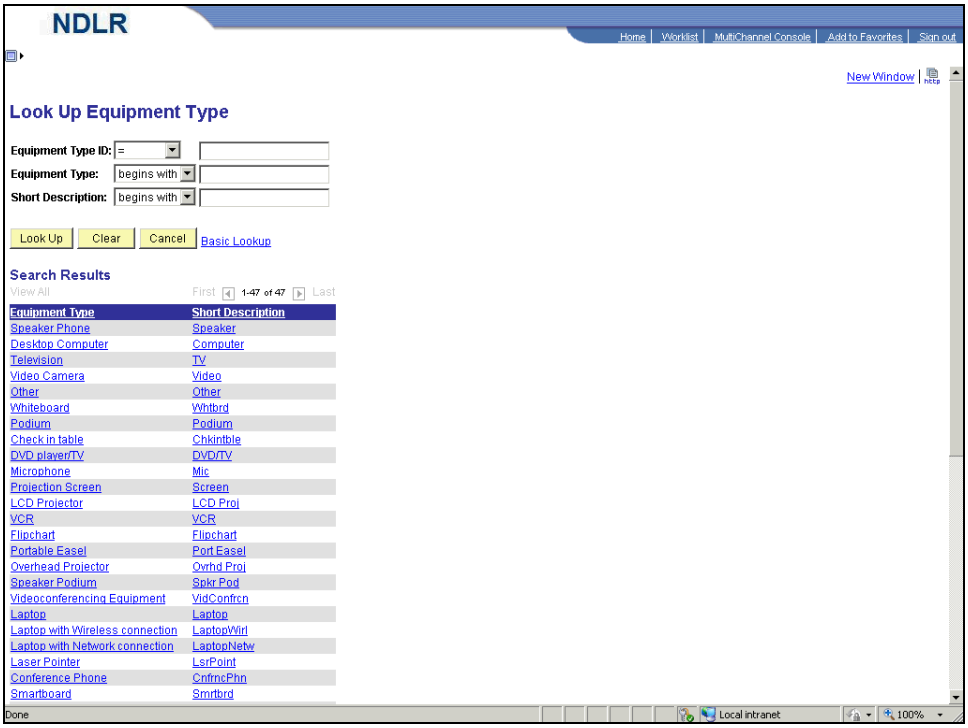
Step	Action
34.	Click the **Equipment and Attachments** tab. Equipment and Attachments



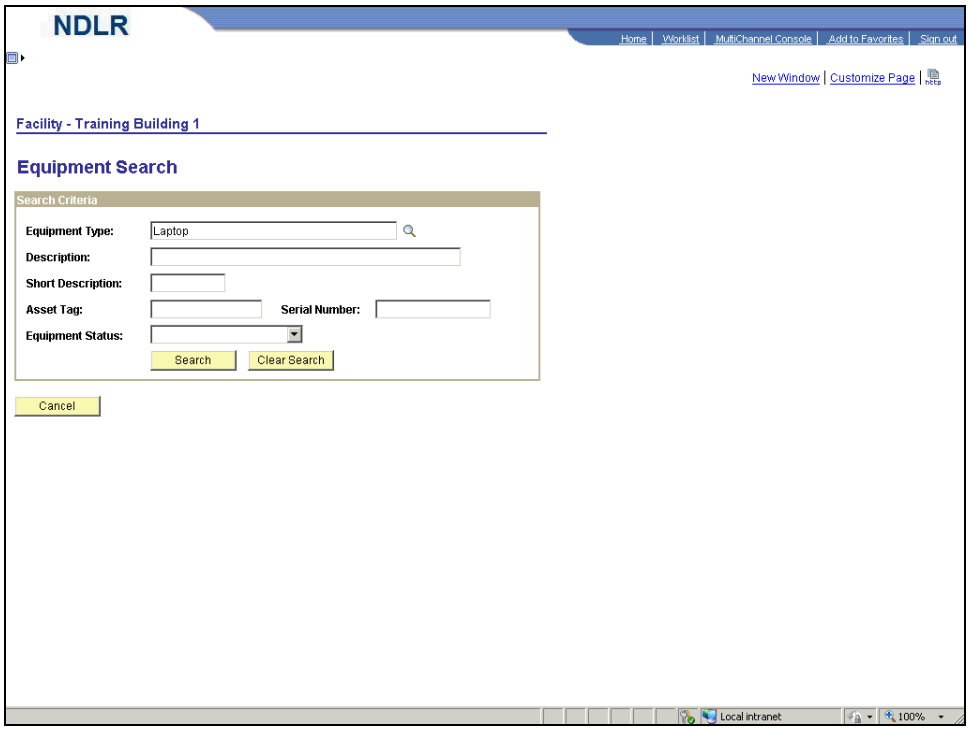
Step	Action
35.	Click the **Description Lookup** button.



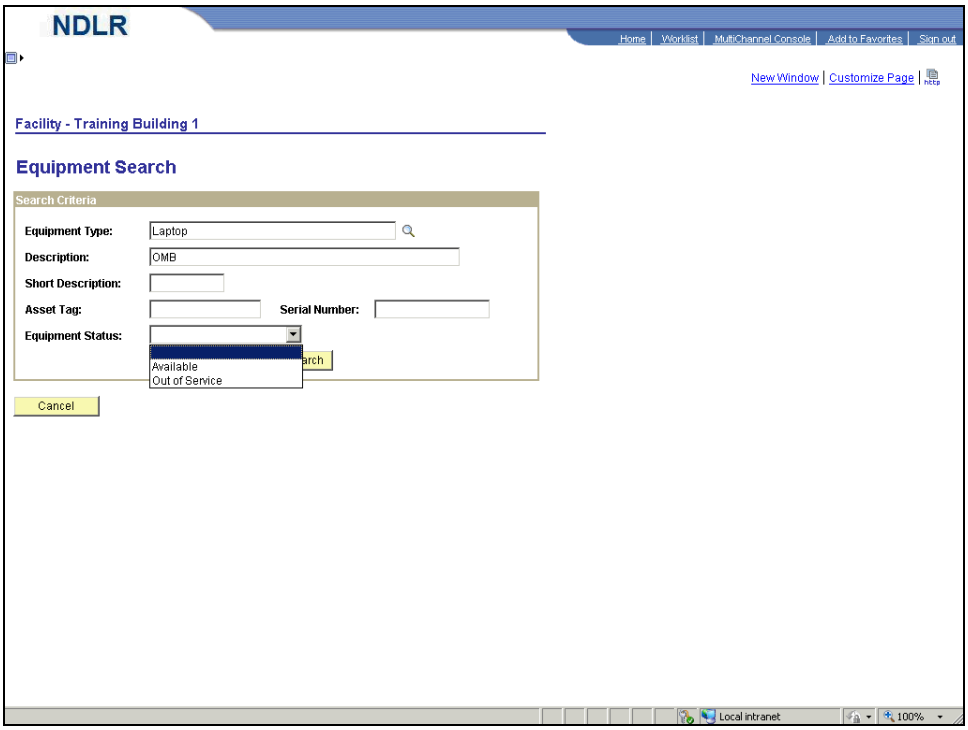
Step	Action
36.	Click the **Equipment Type Lookup** button.



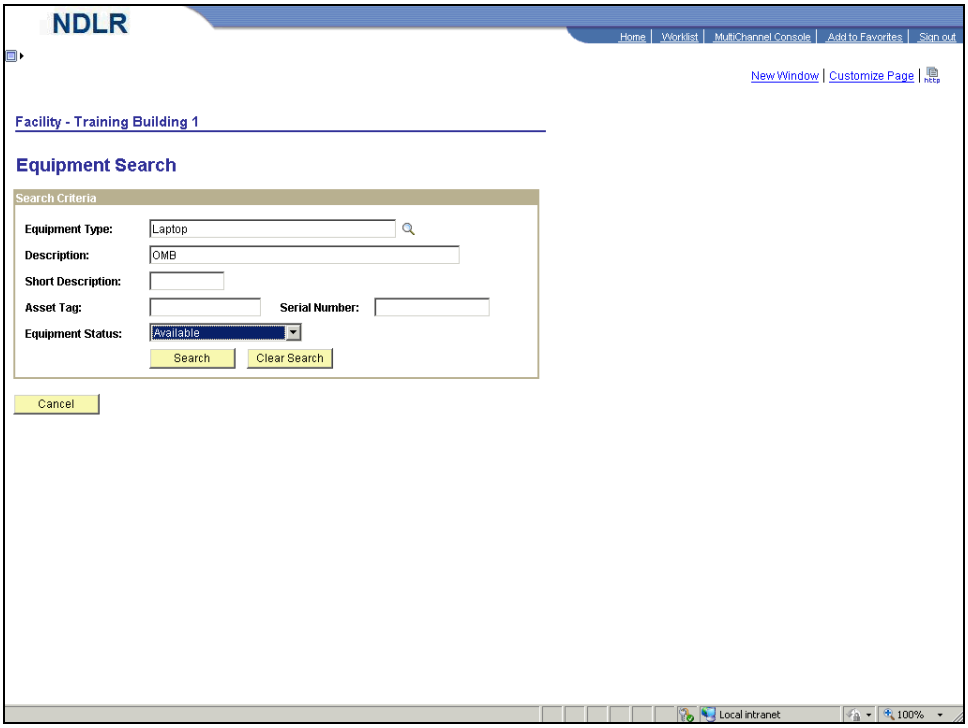
Step	Action
37.	Select the "**Laptop**" list item.



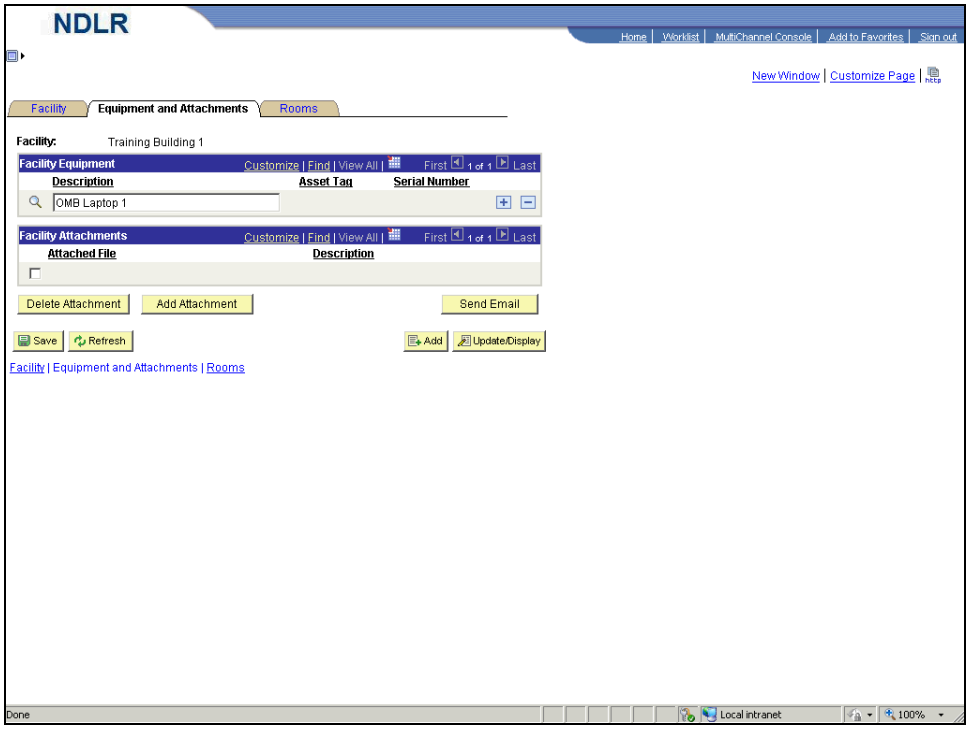
Step	Action
38.	Click in the **Description** field.
39.	Enter the desired information into the **Description** field. Enter "**OMB**".
40.	Click the **Equipment Status** drop-down list.



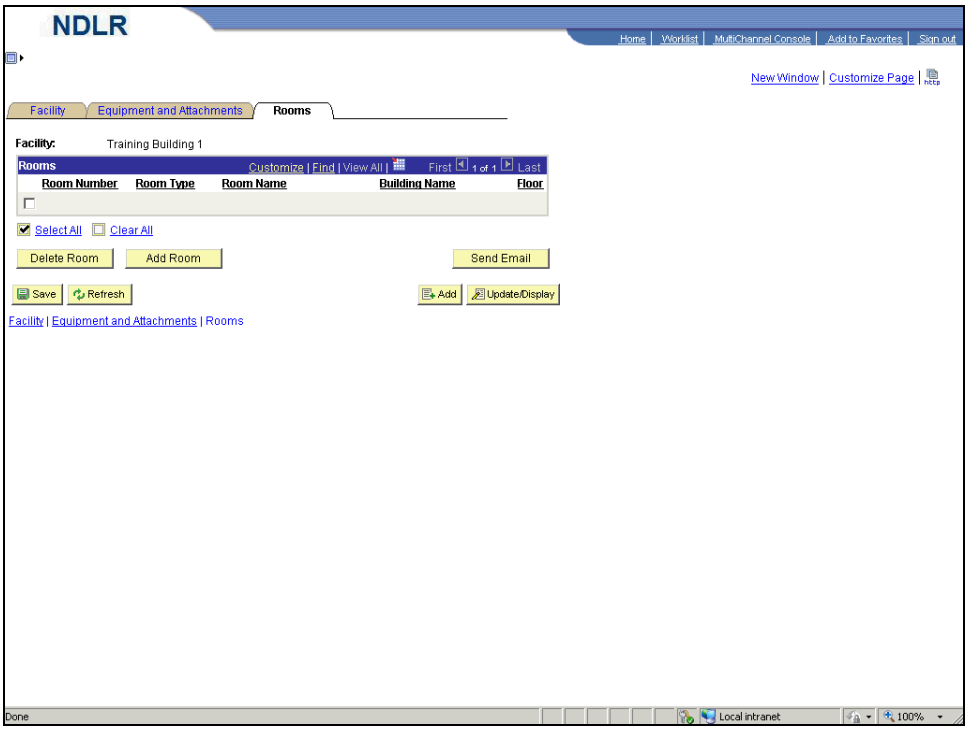
Step	Action
41.	Select the "**Available**" list item. Available



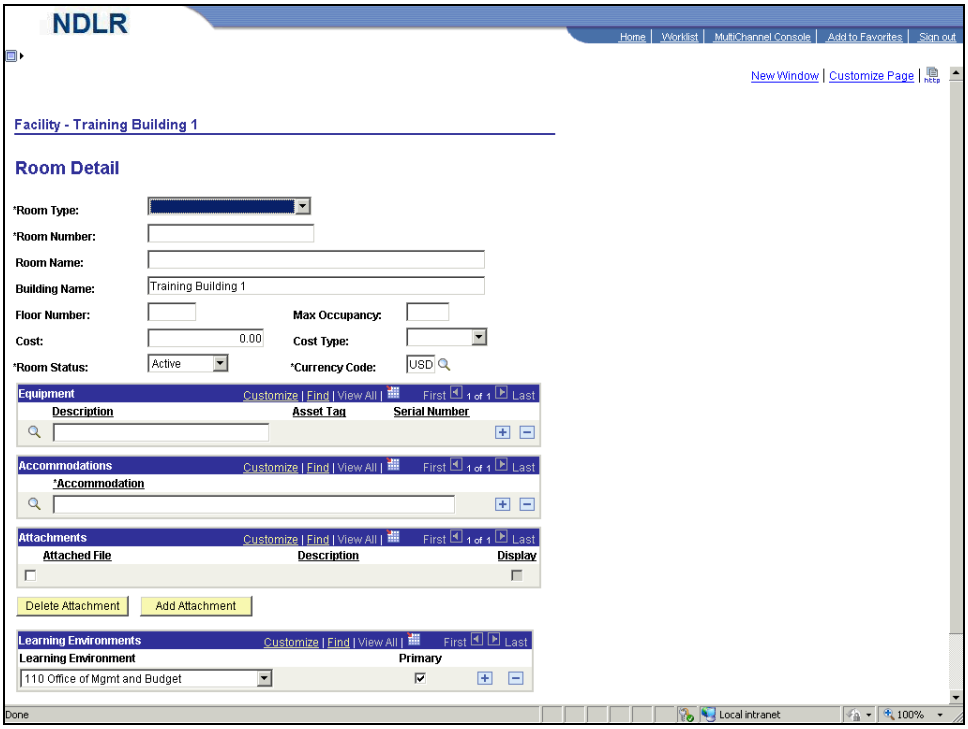
Step	Action
42.	Click the **Search** button. Search
43.	Select the "**OMB Laptop 1**" link. OMB Laptop 1



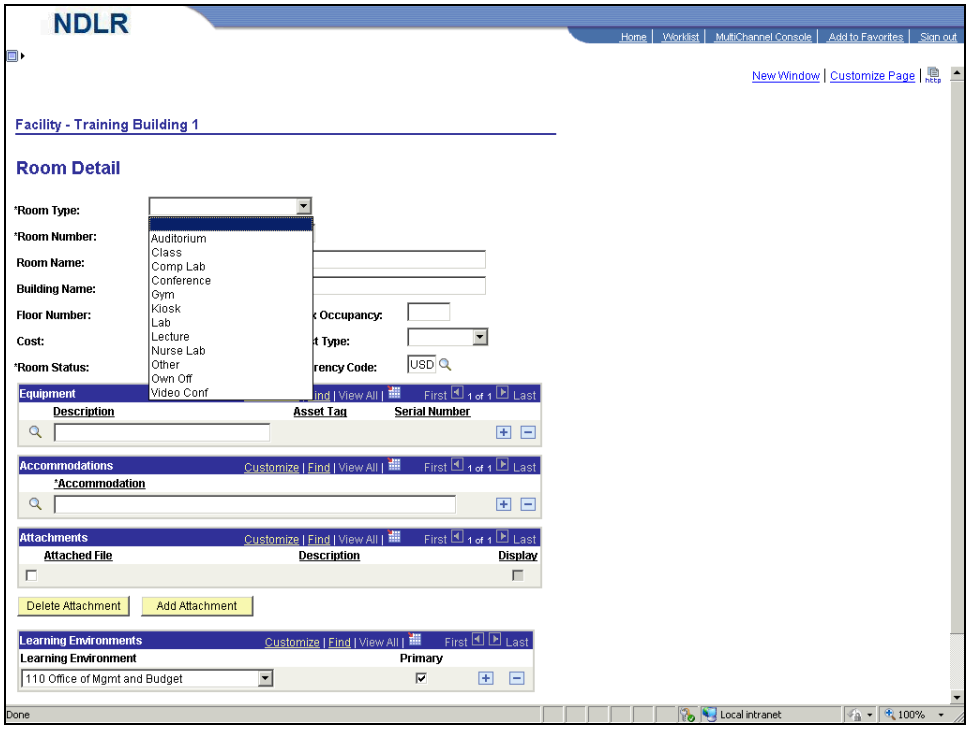
Step	Action
44.	Click the **Rooms** tab. Rooms



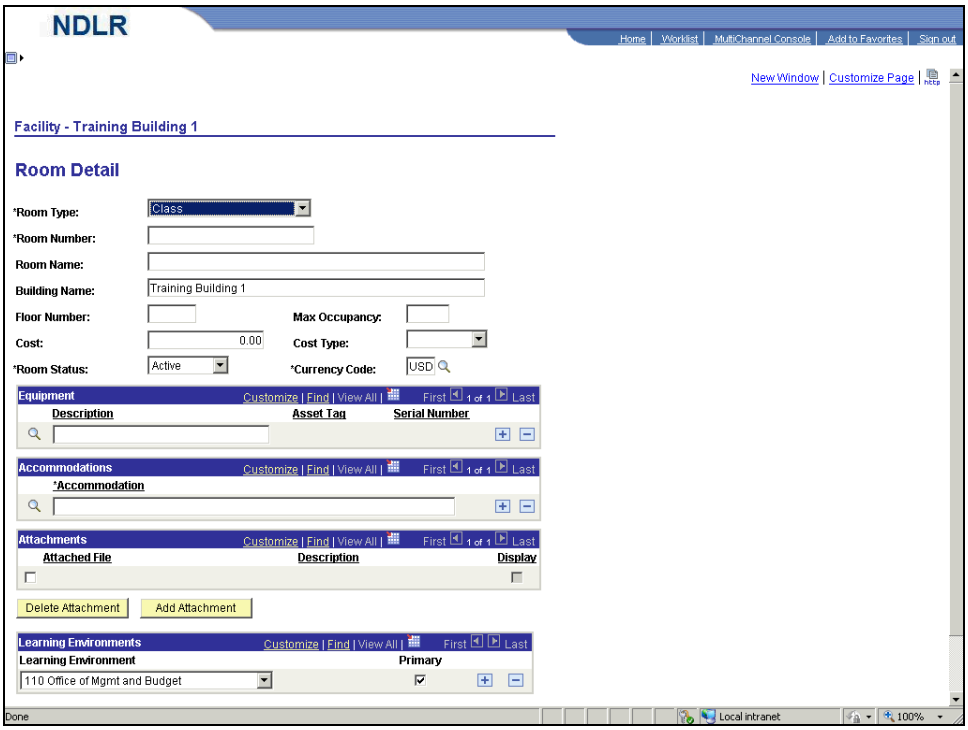
Step	Action
45.	Click the **Add Room** button. Add Room



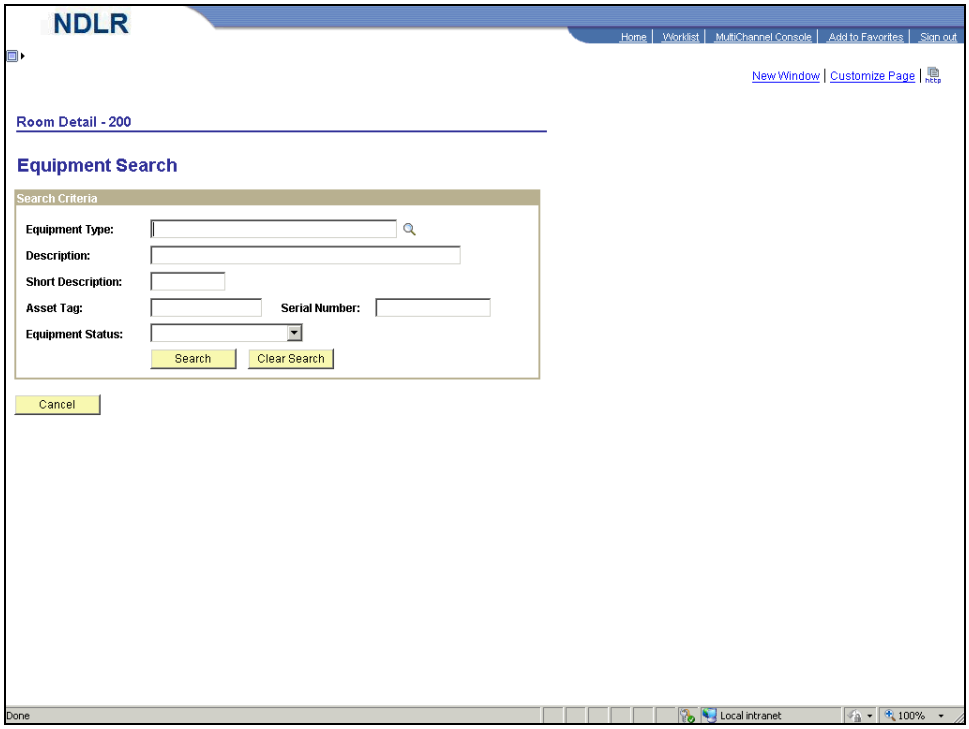
Step	Action
46.	Click the **Room Type** drop-down list.



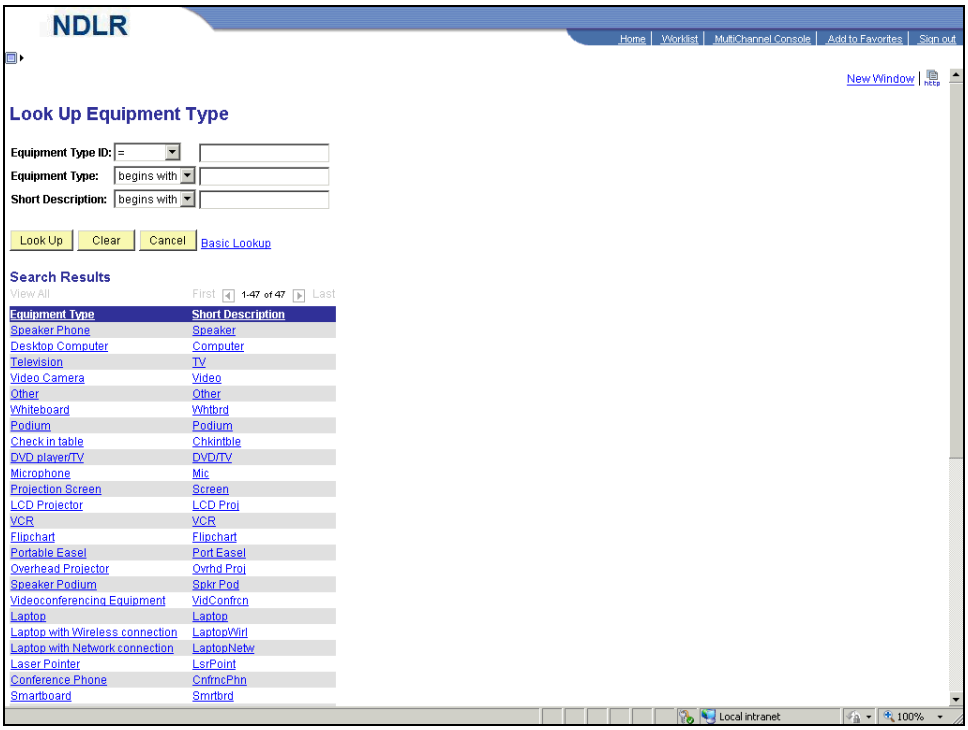
Step	Action
47.	Select the "**Class**" list item.



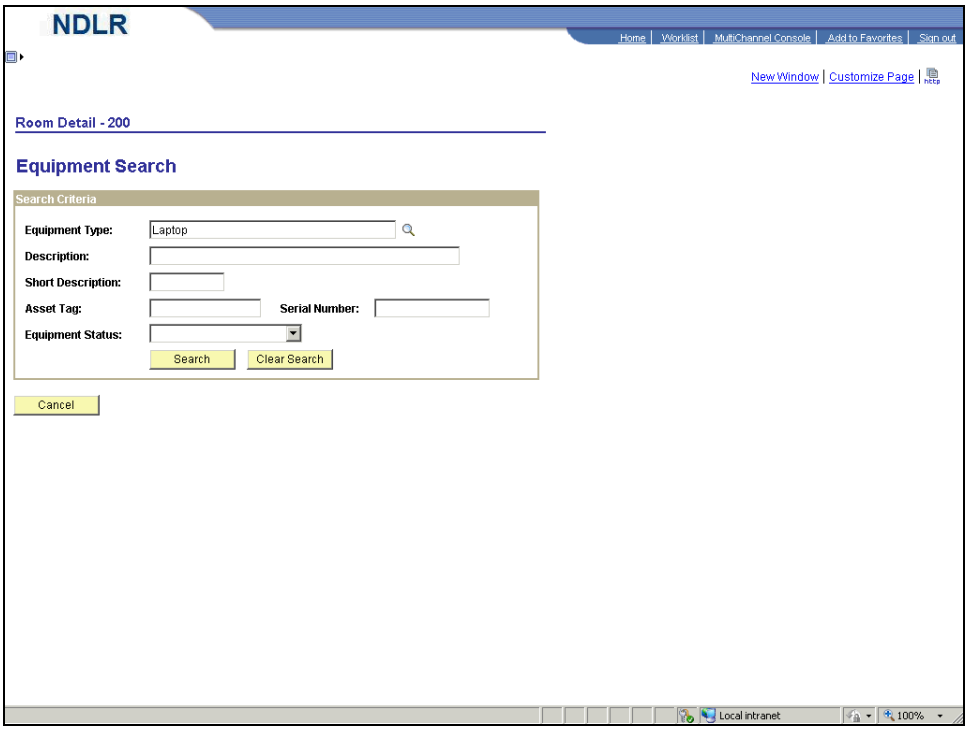
Step	Action
48.	Click in the **Room Number** field.
49.	Enter the desired information into the **Room Number** field. Enter "**200**".
50.	Click in the **Room Name** field.
51.	Enter the desired information into the **Room Name** field. Enter "**Northern Lights**".
52.	Click in the **Floor Number** field.
53.	Enter the desired information into the **Floor Number** field. Enter "**2**".
54.	Click in the **Max Occupancy** field.
55.	Enter the desired information into the **Max Occupancy** field. Enter "**20**".
56.	Click the **Description Lookup** button.



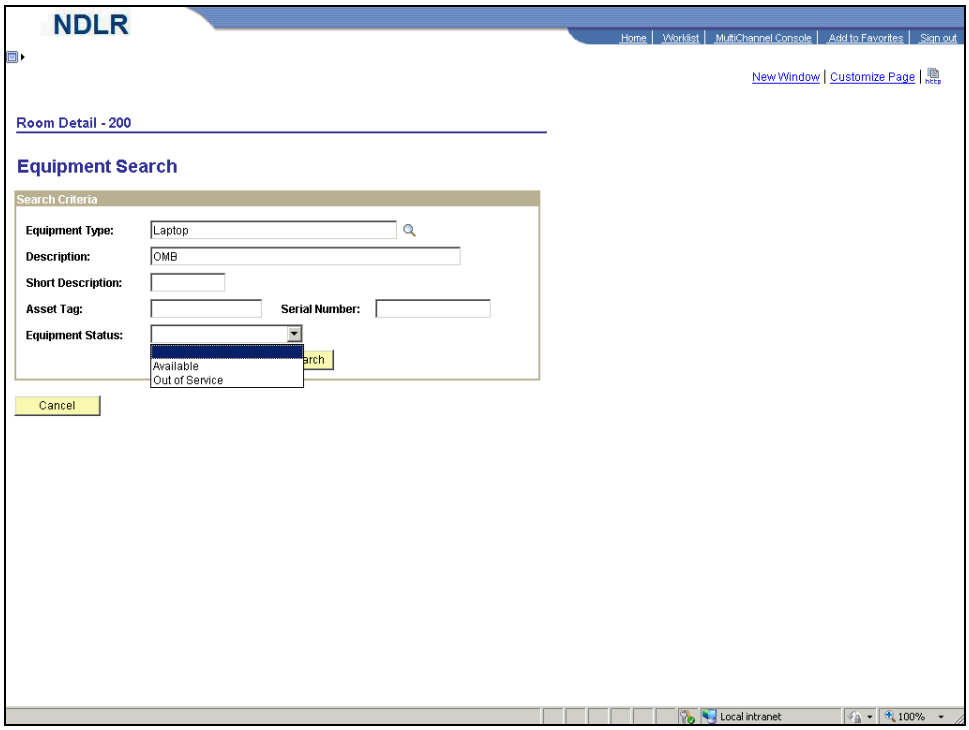
Step	Action
57.	Click the **Equipment Type Lookup** button.



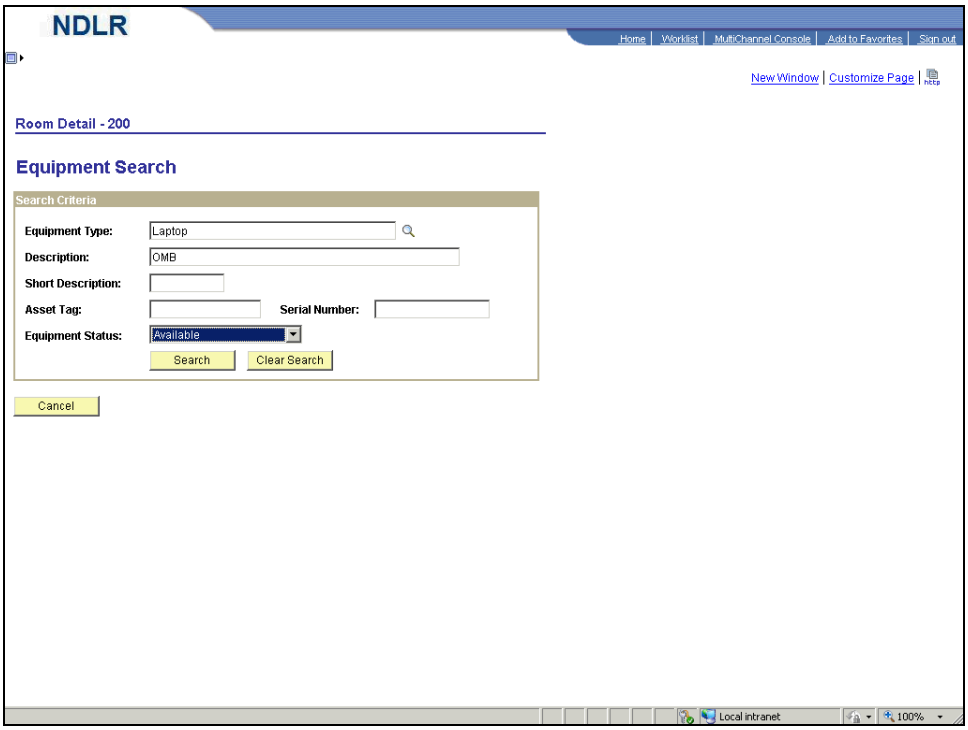
Step	Action
58.	Select the "**Laptop**" list item.



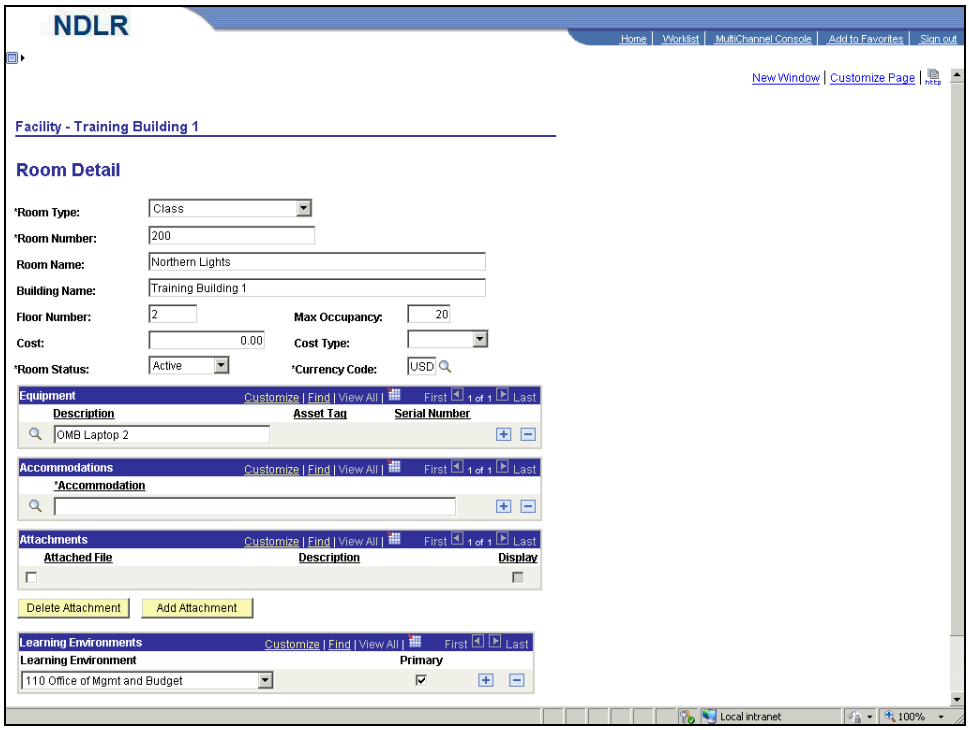
Step	Action
59.	Click in the **Description** field.
60.	Enter the desired information into the **Description** field. Enter "**OMB**".
61.	Click the **Equipment Status** drop-down list.

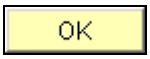


Step	Action
62.	Select the "**Available**" list item. Available



Step	Action
63.	Click the **Search** button. Search
64.	Click the "**OMB Laptop 2**" link. OMB Laptop 2



Step	Action
65.	Click the scrollbar.
66.	Click the **OK** button. 

Step	Action
67.	Click the **Save** button. Save
68.	**Congratulations**! You should now be able to: - Navigate to the Facility page. - Define a facility. - Define a room within a facility. **End of Procedure.**

Lesson 3: Managing Person and Organization Data

3.1 Creating a Criteria Learner Group

Learner groups are defined groups of learners that share some of the same learner attributes, such as the same department or job code. Criteria based learner groups are created by selecting the attributes that users must have to belong to the group. Choose from a set of eight criteria, using and/or logic to define membership eligibility.

Use Learner Groups to:

- Specify the categories, catalog items, activities and programs a learner can access through the catalog.
- Perform group or mass enrollment.
- Assign objectives to a group of learners.

- Specify the types of supplemental learning a Learner can report.

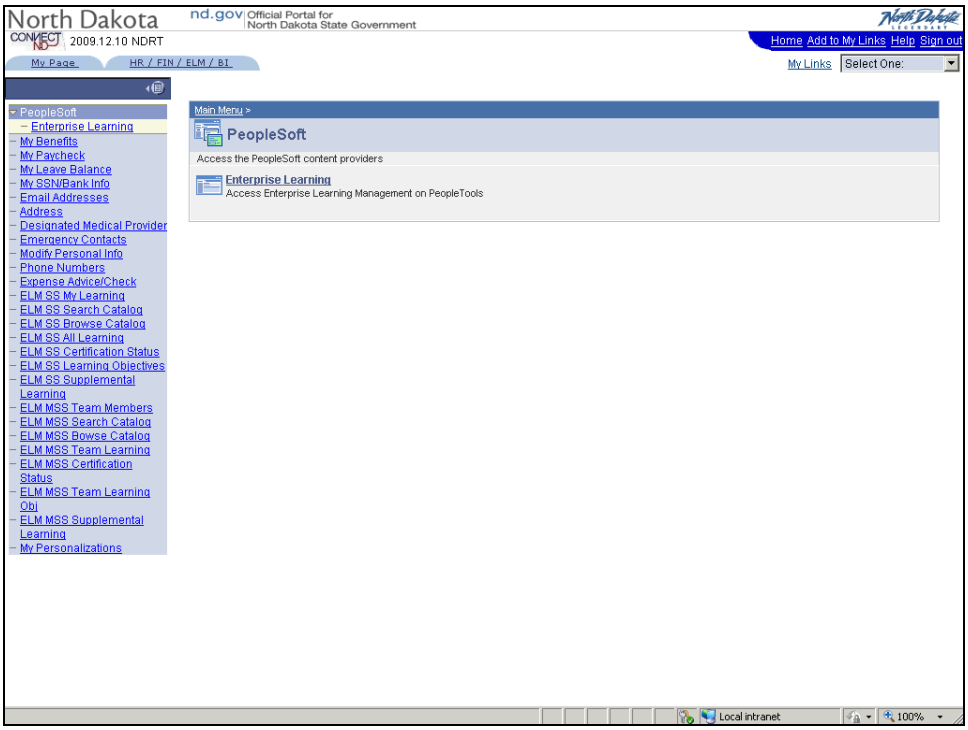
One of the primary functions of Learner Groups is to allow access to one or more learning catalogs. For a user to access a particular activity in the catalog the user must belong to a Learner Group that is assigned to the activity, the catalog item and the category that is associated with the catalog item.

Procedure

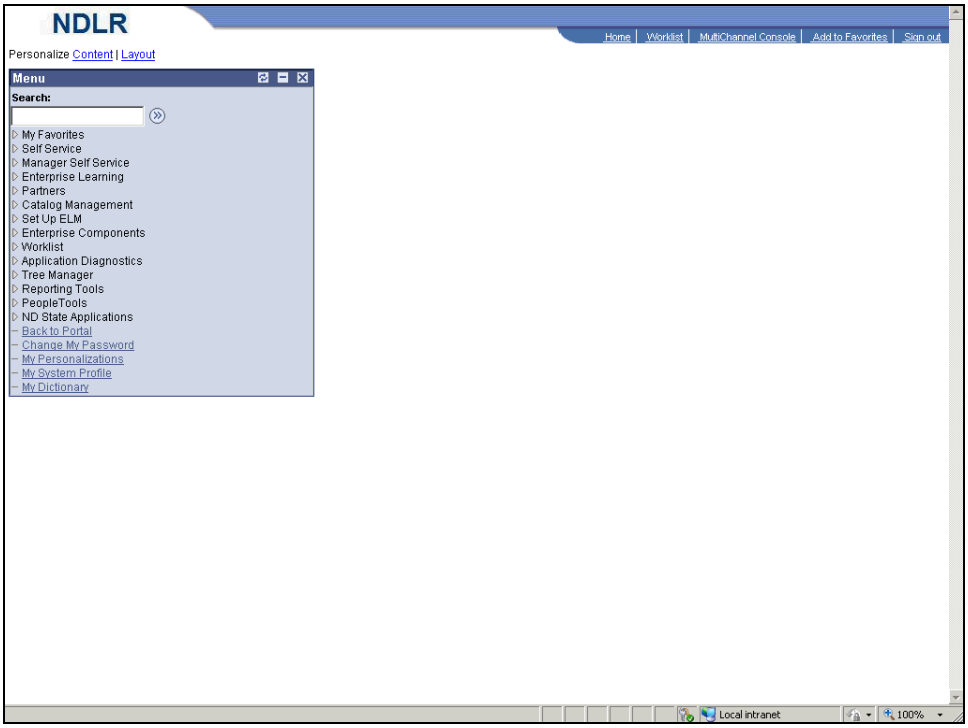
By the end of this topic, you will be able to:

- Navigate to the **Learner Group**
- Create a Criteria Learner Group.

Step	Action
1.	Begin by navigating to the **Maintain Learner Groups** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

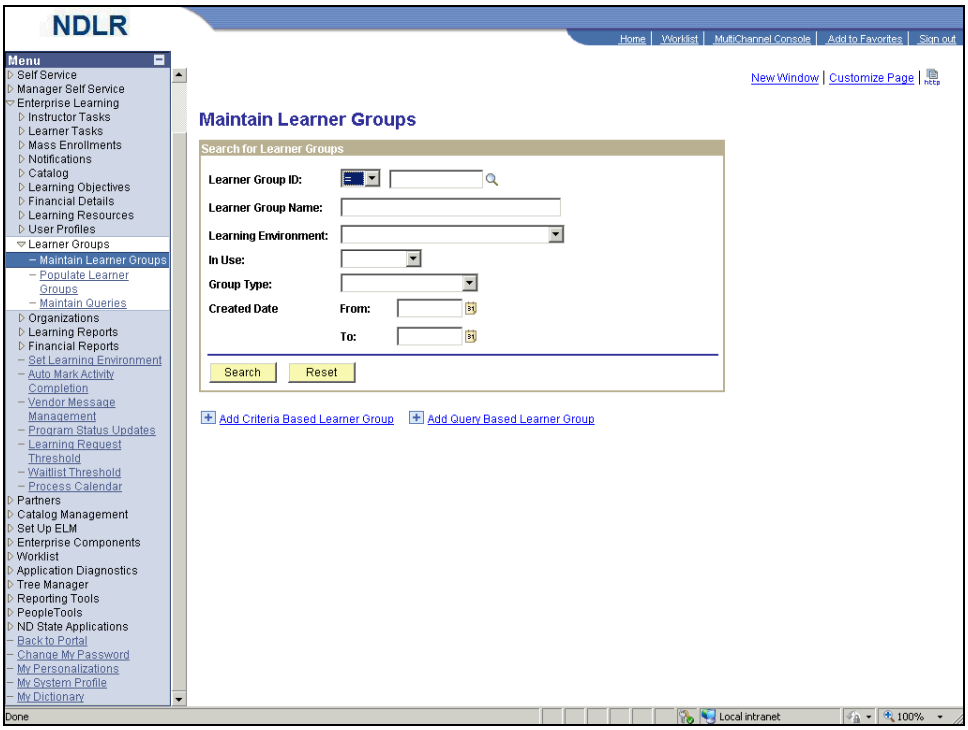


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

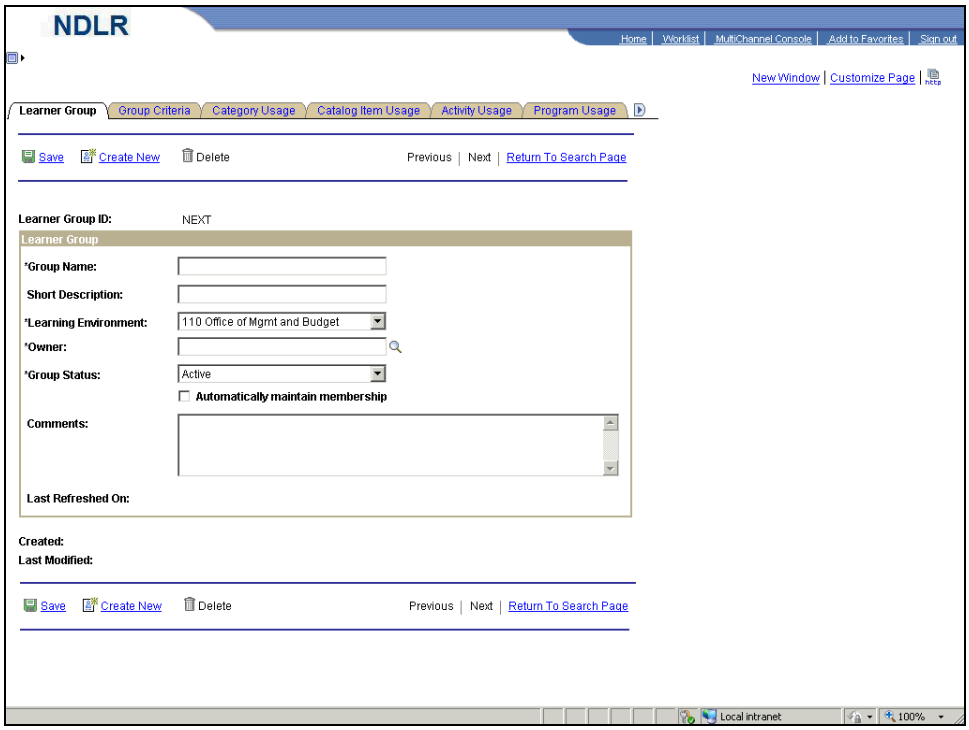


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

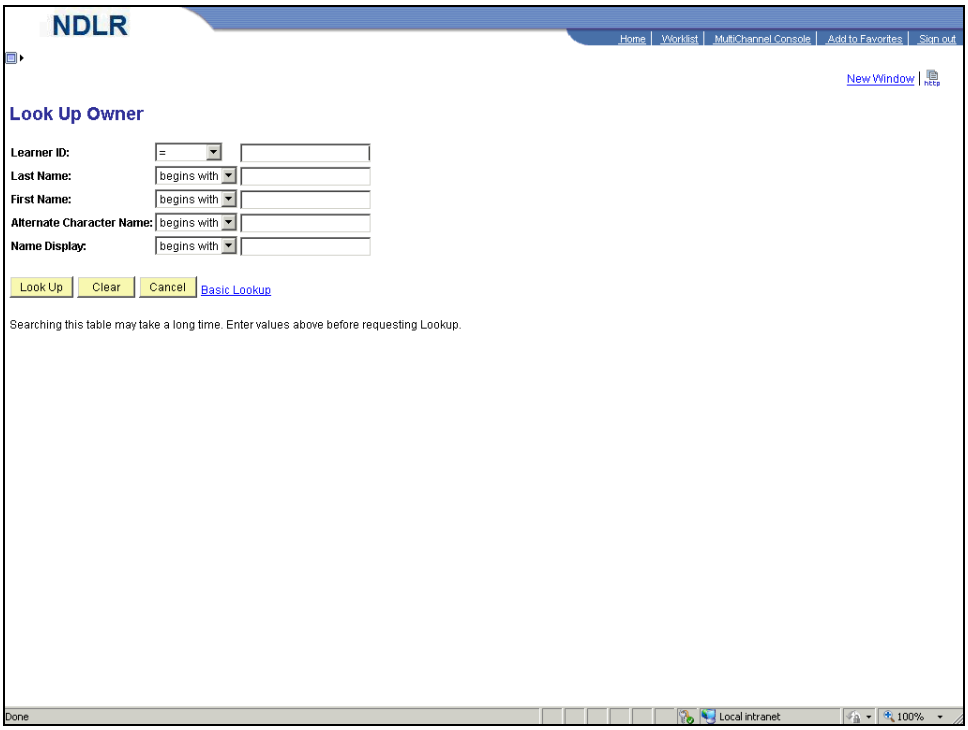
Step	Action
5.	Click the **Learner Groups** link. ▷ Learner Groups
6.	Click the **Maintain Learner Groups** link. – Maintain Learner Groups



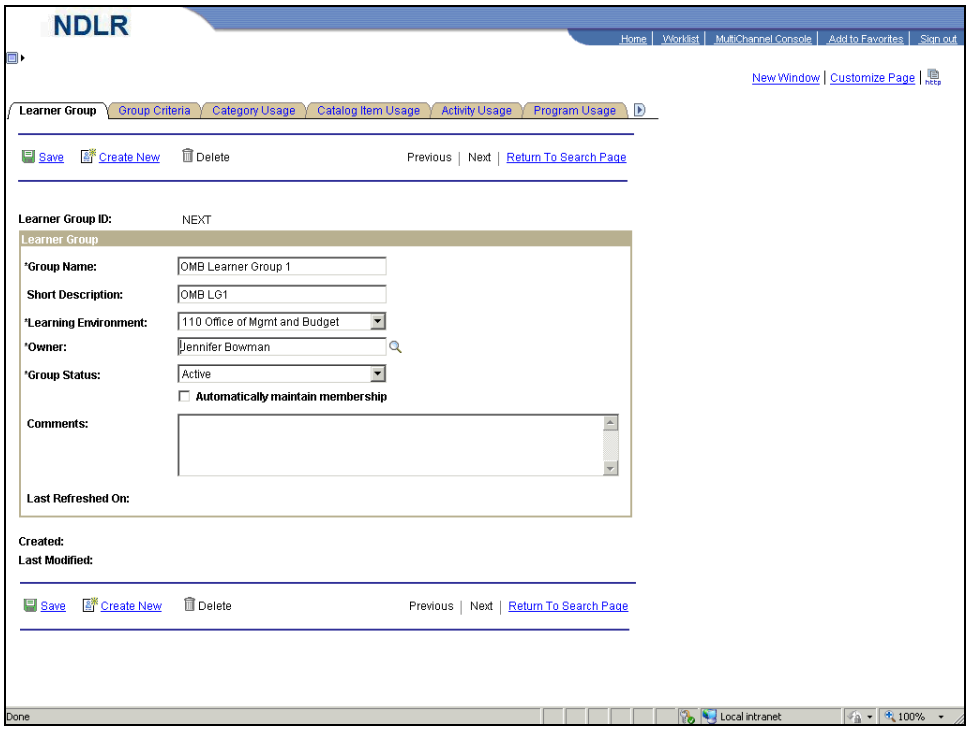
Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Add Criteria Based Learner Group** link. Add Criteria Based Learner Group
9.	Use the **Learner Group** page to enter the learner group name and short description and to associate the learner group with a learning environment, owner and status.



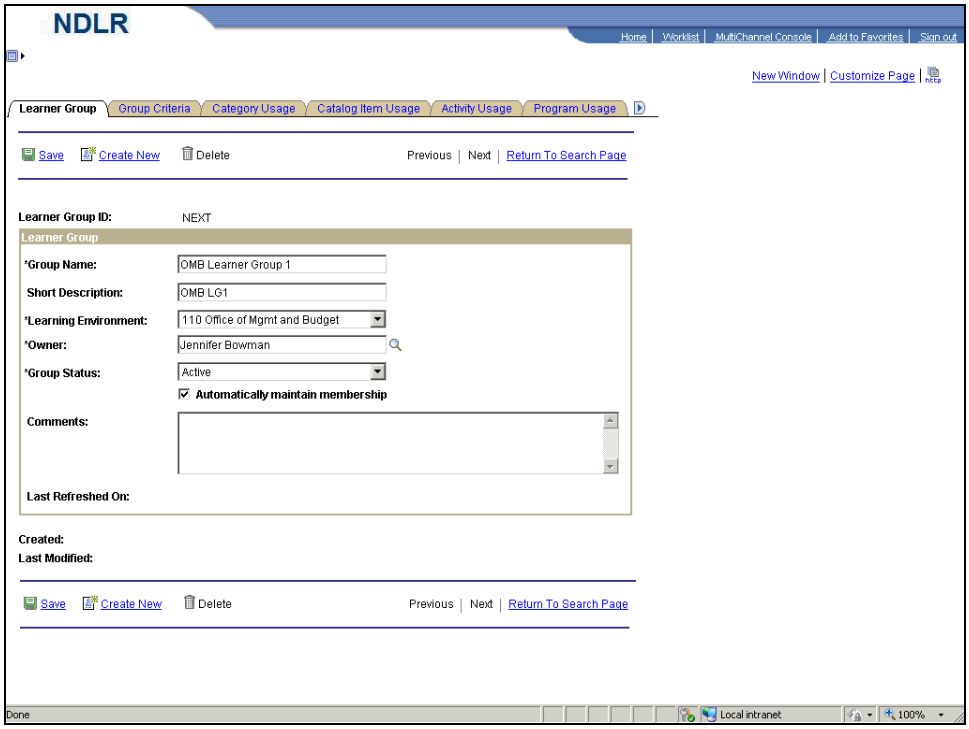
Step	Action
10.	Click in the **Group Name** field.
11.	Enter the desired information into the **Group Name** field. Enter "**OMB Learner Group 1**".
12.	Click in the **Short Description** field.
13.	Enter the desired information into the **Short Description** field. Enter "**OMB LG1**".
14.	The value in the **Learning Environment** field is inherited from the administrator. The learning environment controls access to the catalog.
15.	The **Owner** field indicates the owner of the learner group. This would be the person you would contact in the event you needed to change or question the criteria of the learner group.
16.	Click the **Owner Lookup** button.



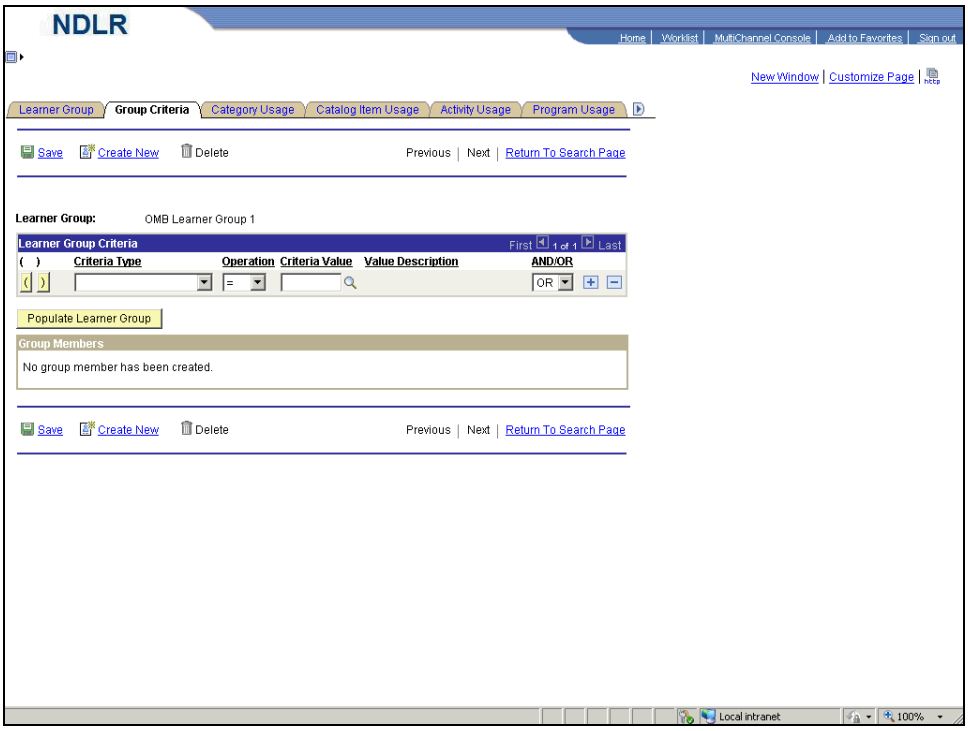
Step	Action
17.	Click in the **Last Name** field.
18.	Enter the desired information into the **Last Name** field. Enter "**Bowman**".
19.	Click the **Look Up** button. Look Up
20.	Select the "**JENNIFER**" list item.
21.	Use the **Automatically maintain membership** option to have the learner group membership updated daily through the update membership process. Selecting this option, the system will look in HR to see if any changes have been made to a learners HR record (i.e, transfer).



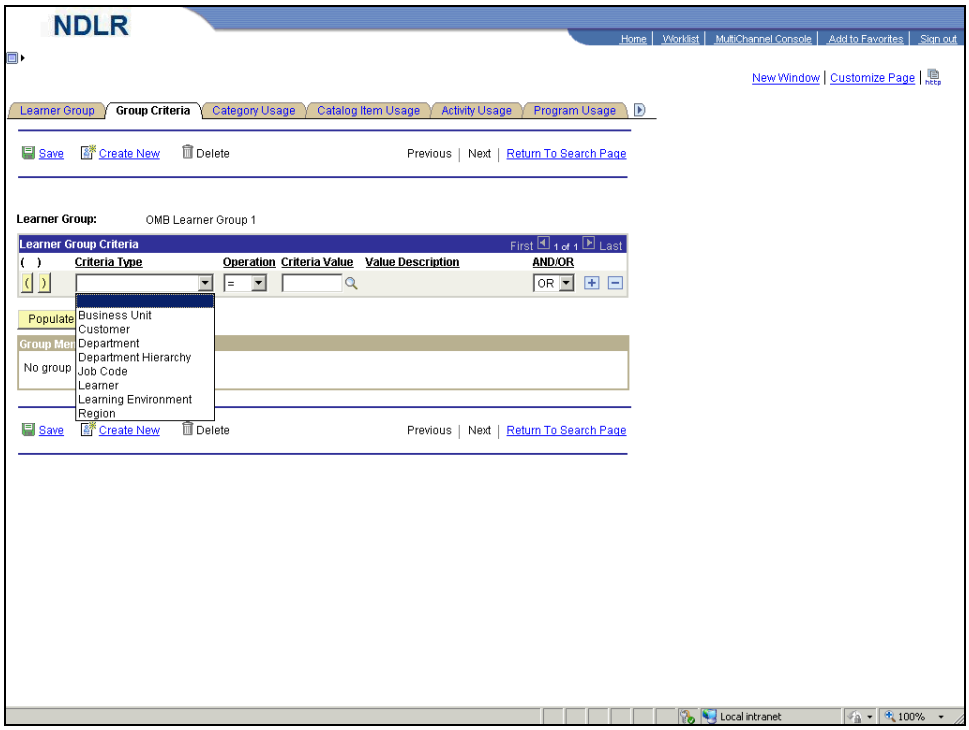
Step	Action
22.	Click the **Automatically maintain membership** option.



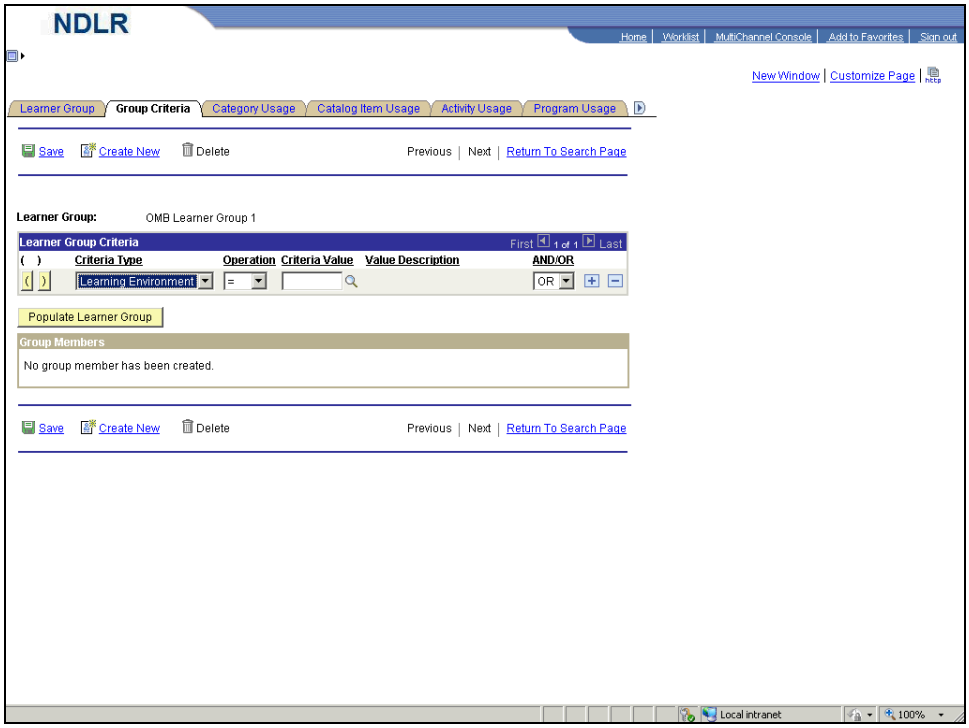
Step	Action
23.	Click the **Group Criteria** tab. Group Criteria
24.	Use the **Group Criteria** page to define the criteria for group membership and to select the group members.
25.	The **Criteria Type** field indicates the membership of the group. Some examples of memberships are; business unit, job code and learner type. Criteria types are predefined by the State.



Step	Action
26.	Click the **Criteria Type** drop-down list.



Step	Action
27.	Select the "**Learning Environment**" list item. Learning Environment



Step	Action
28.	Click the **Criteria Value Lookup** button.

Step	Action
29.	Select the "**OMB**" list item.

Step	Action
30.	Click the **Populate Learner Group** button. Populate Learner Group
31.	**Note**: If the Learner Group is large (1,000 + employees), it is recommended to allow learner groups to populate during batch processing at night.
32.	Click the **scrollbar**.
33.	Click the **Save** link. Save
34.	**Congratulations**! You should now be able to: - Navigate to the Learner Group page. - Create a Criteria Learner Group. **End of Procedure.**

3.2 Creating a Query-Based Learner Group

Learner Groups are defined groups of learners that share some of the same learner attributes, such as the same department or job code. To create a query based Learner Group, select a predefined query, such as job code and State, and specify the values to use when the query is run. Queries allow the user to obtain specific data based on desired specifications. Unlike criteria based Learner Groups, query based Learner Groups can be built using almost any combination of attributes in Enterprise Learning Management. You can use the delivered queries or have one created using Query Manager.

Use Learner Groups to:

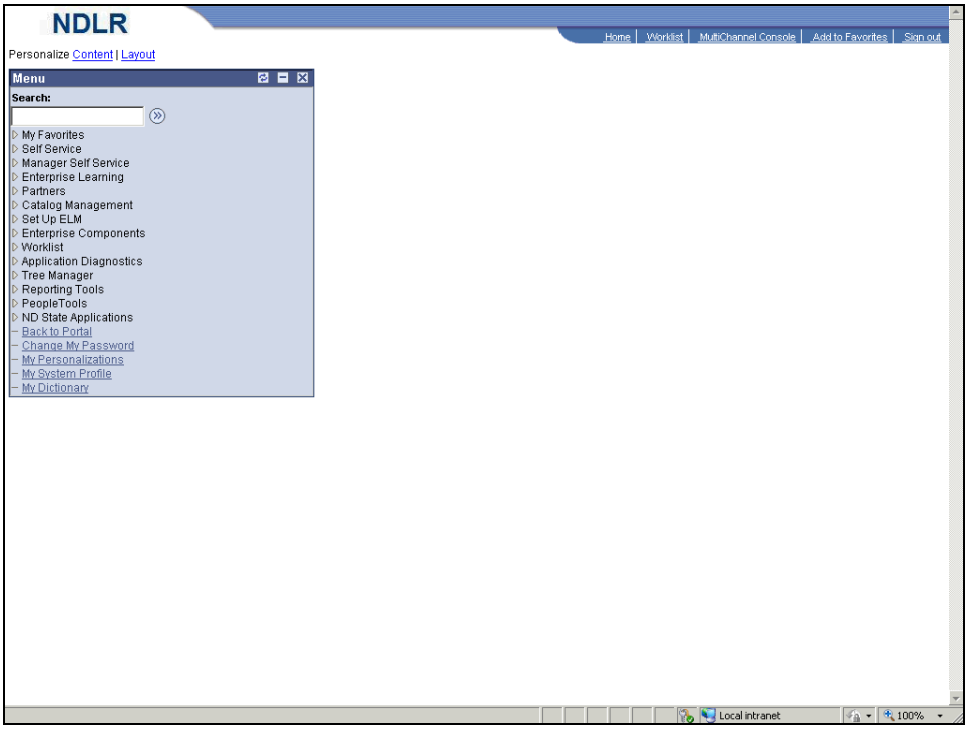
- Specify categories, catalog items, activities and programs a Learner can access through the catalog.
- Perform group or mass enrollment.
- Assign objectives to a large group of Learners.
- Specify the types of supplemental learning a Learner can report.

One of the primary functions of Learner Groups is to allow access to the learning catalog. For a user to access a particular activity in the catalog, the user must belong to a Learner Group that is assigned to the activity, catalog item and the category that is associated with the catalog item.

Procedure

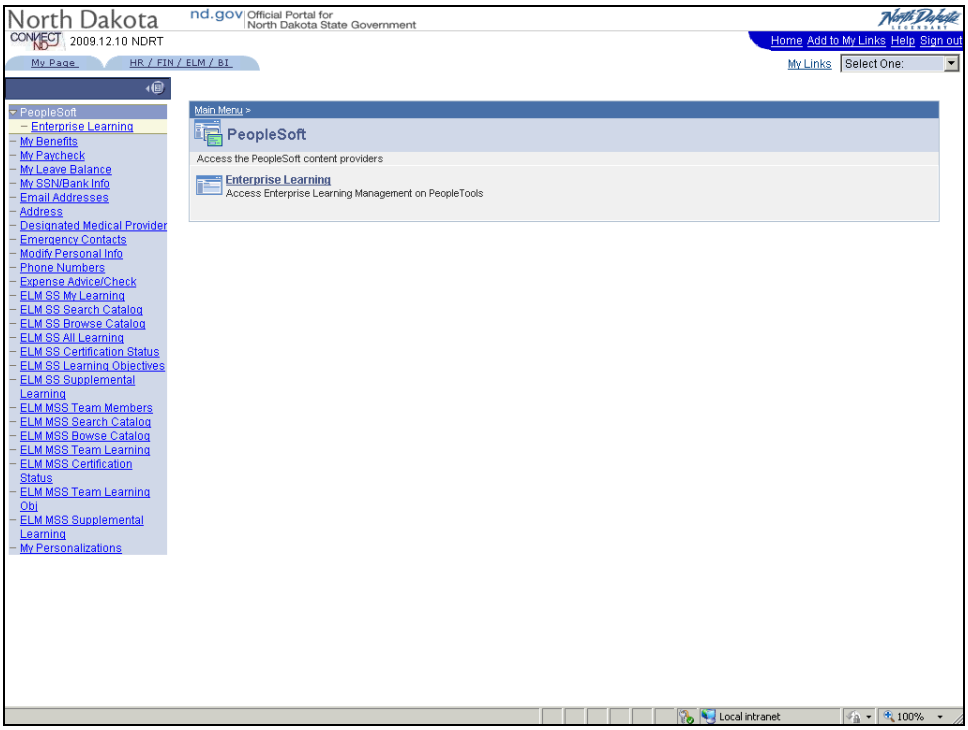
By the end of this topic, you will be able to:

- Navigate to the **Maintain Learner Groups** page.
- Create a query-based Learner Group.

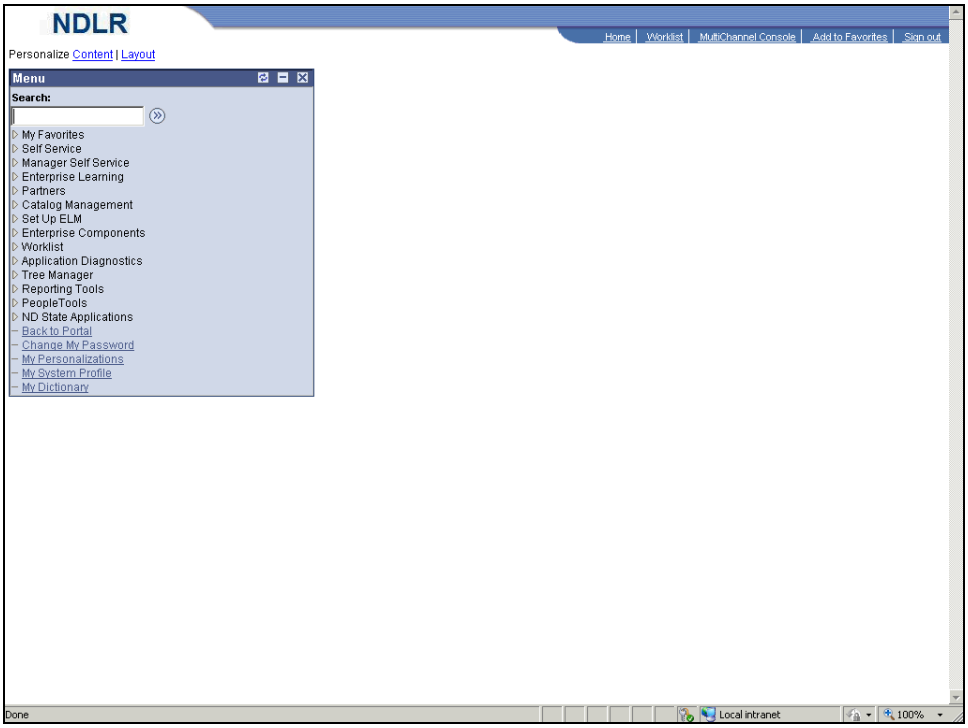


Step	Action
1.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
2.	Begin by navigating to the **Maintain Learner Groups** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
3.	Click the **PeopleSoft** link. PeopleSoft

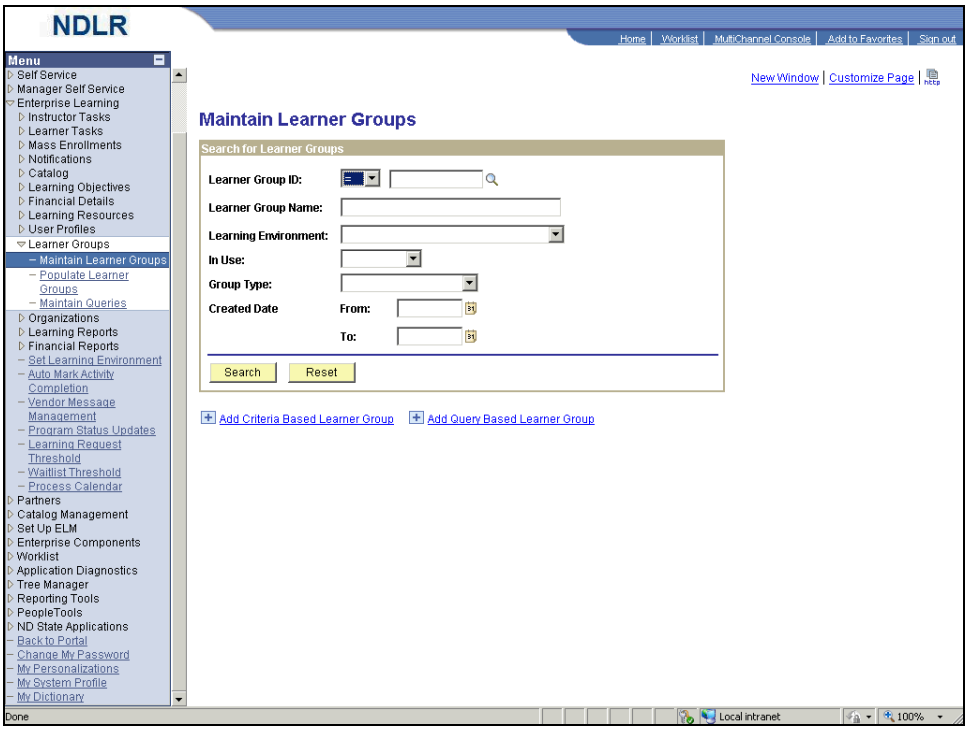


Step	Action
4.	Click the **Enterprise Learning** link. Enterprise Learning

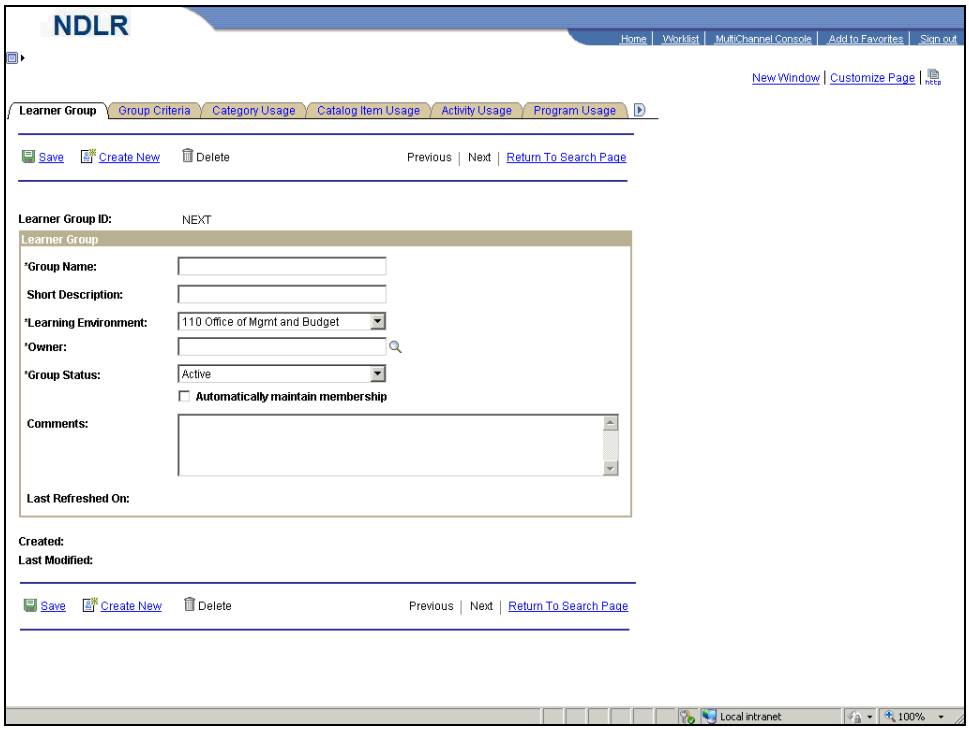


Step	Action
5.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

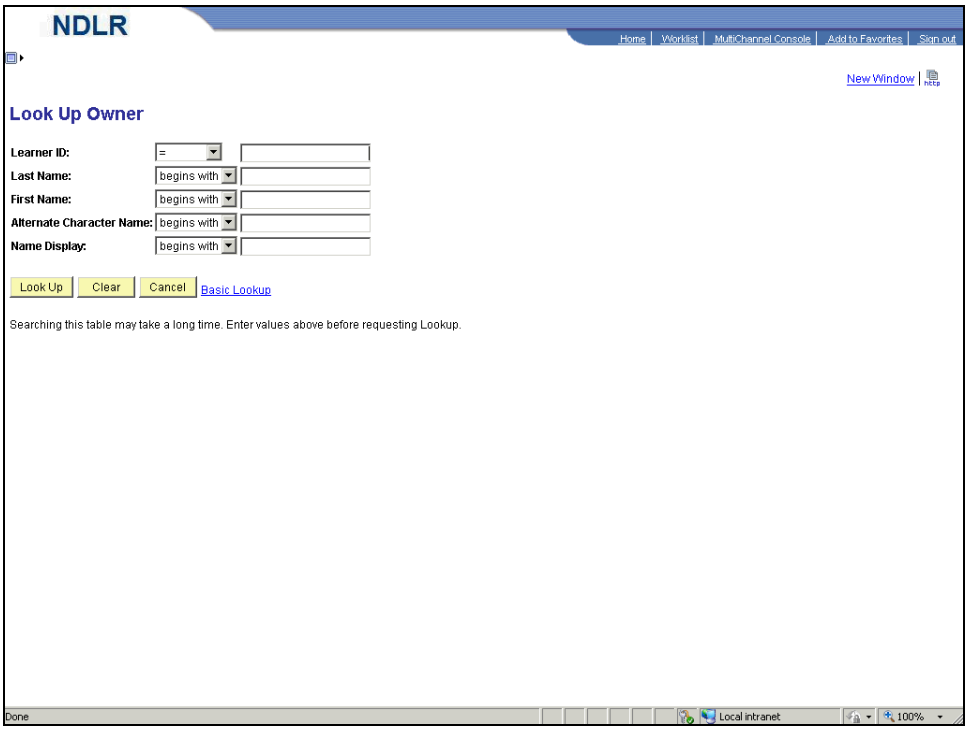
Step	Action
6.	Click the **Learner Groups** link. ▷ Learner Groups
7.	Click the **Maintain Learner Groups** link. – Maintain Learner Groups



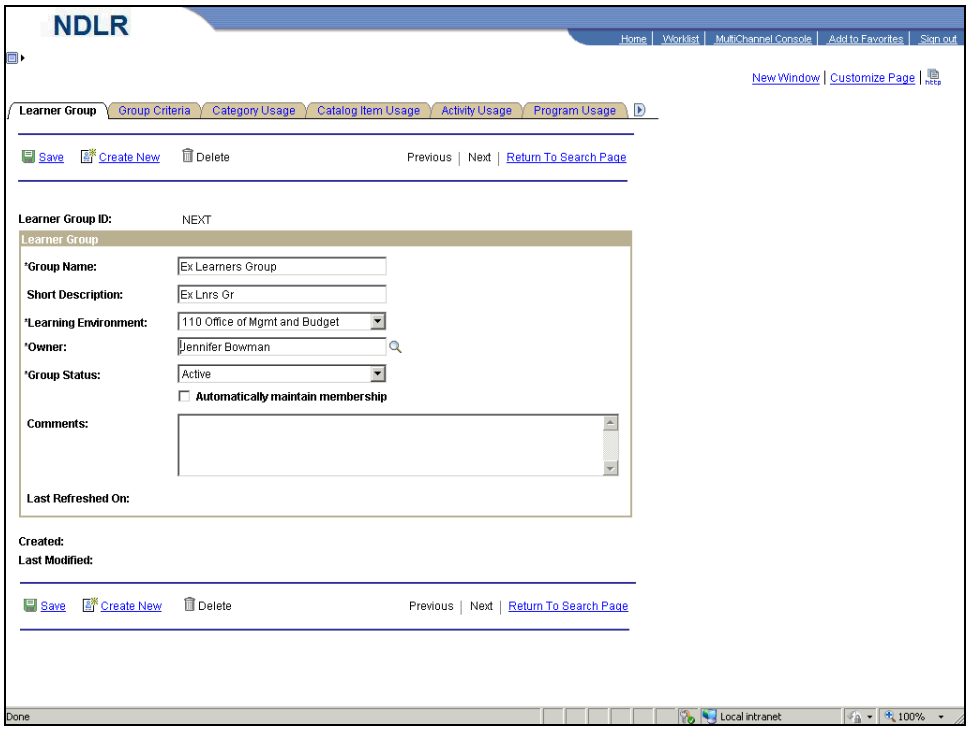
Step	Action
8.	Click the **Collapse Menu** button.
9.	Click the **Add Query Based Learner Group** link. Add Query Based Learner Group
10.	Use the **Learner Group** page to enter the learner group name, short description and to associate the learner group with a learning environment, owner and status.



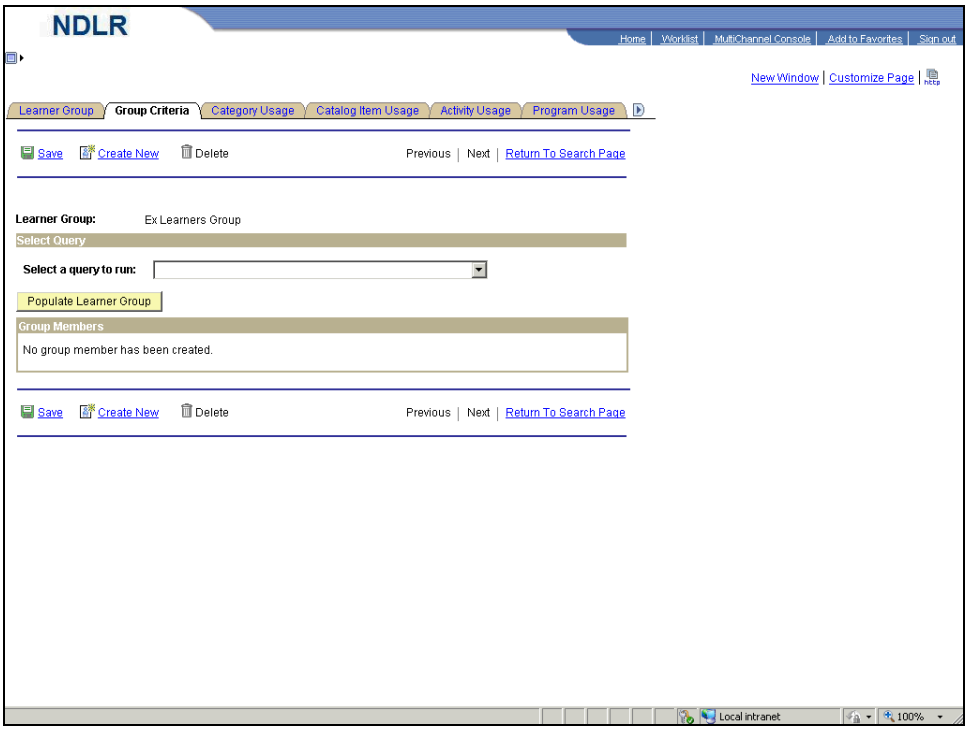
Step	Action
11.	Click in the **Group Name** field.
12.	Enter the desired information into the **Group Name** field. Enter "**Ex Learners Group**".
13.	Click in the **Short Description** field.
14.	Enter the desired information into the **Short Description** field. Enter "**Ex Lnrs Gr**".
15.	The value in the **Learning Environment** field is inherited from the administrator. The learning environment controls access to the catalog. For this example, retain the default value.
16.	The **Owner** field indicates the owner of the learner group. This is the person you would contact in the event you needed to change or question the criteria of the learner group.
17.	Click the **Owner Lookup** button.



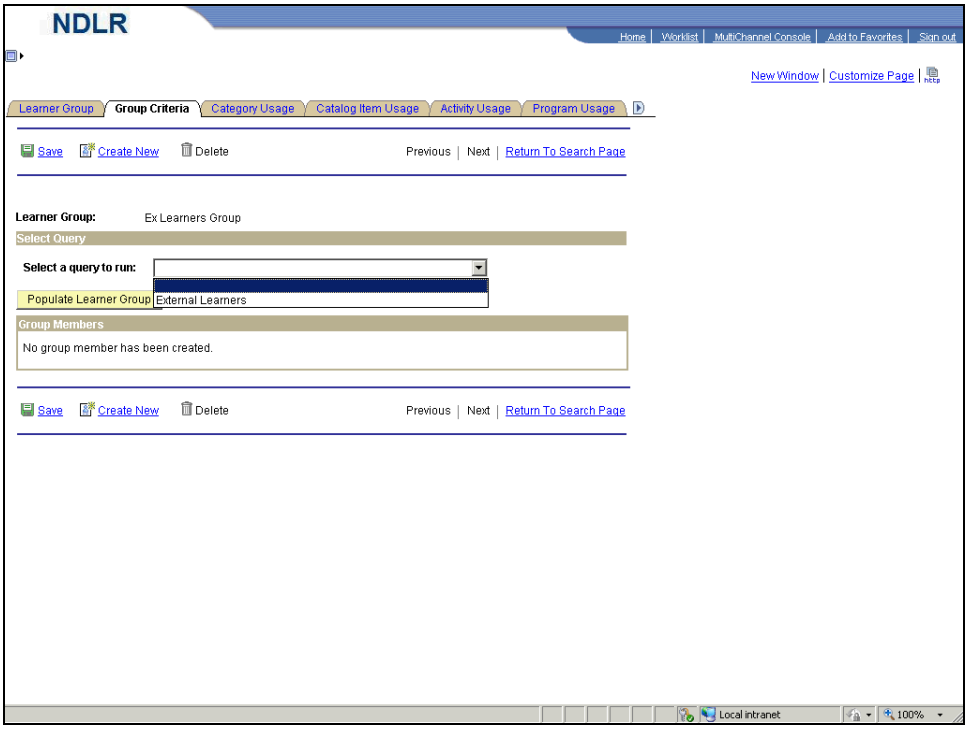
Step	Action
18.	Click in the **Last Name** field.
19.	Enter the desired information into the **Last Name** field. Enter "**Bowman**".
20.	Click the **Look Up** button. Look Up
21.	Click the "**JENNIFER**" link.
22.	Use the **Automatically maintain membership** option to have the learner group membership updated daily through the update membership process. Selecting this option, the system will look in HR to see if any changes have been made to a learners HR record (i.e, transfer).



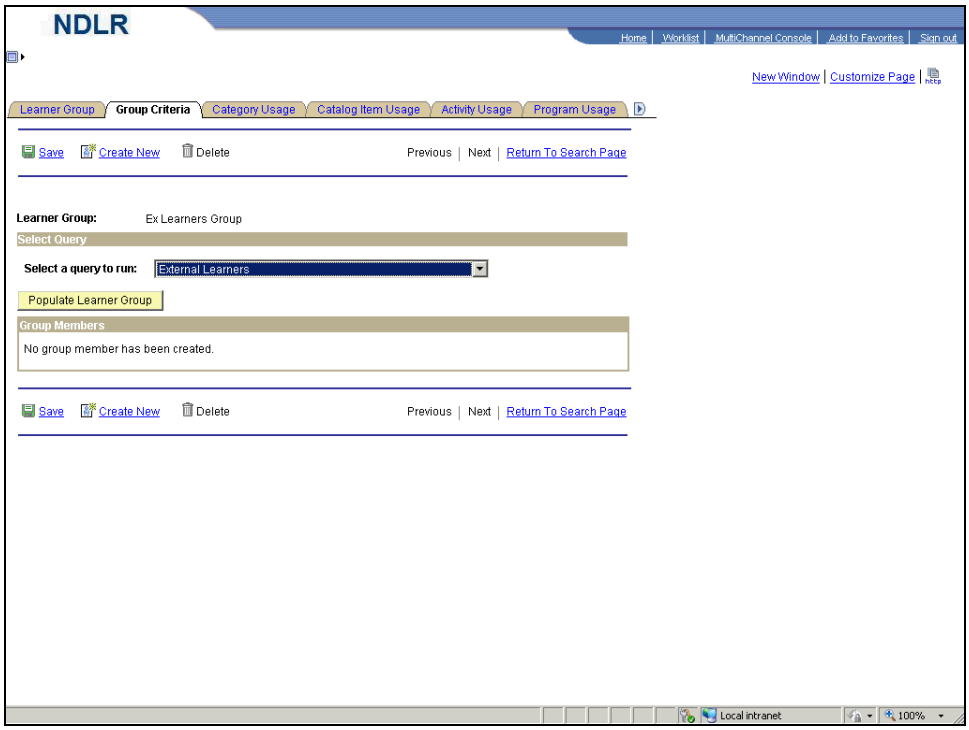
Step	Action
23.	Click the **Automatically maintain membership** option.
24.	Click the **Group Criteria** tab. Group Criteria
25.	Use the **Group Criteria** page to define the queries to process for group membership selection.



Step	Action
26.	Click the **Select a query to run** drop-down list.



Step	Action
27.	Select the "**External Learners**" list item.



Step	Action
28.	Click the **Populate Learner Group** button. Populate Learner Group
29.	Click the **Save** link. Save
30.	**Congratulations**! You should now be able to: - Navigate to the **Maintain Learner Groups** page. - Create a query-based Learner Group. **End of Procedure.**

3.3 Creating Vendor Profiles

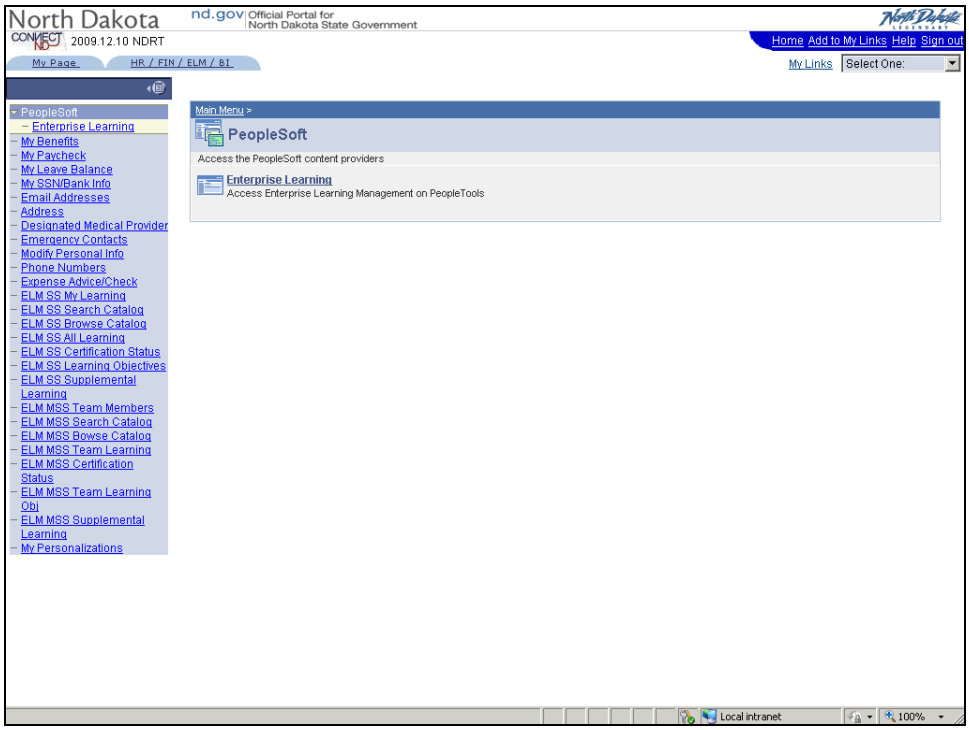
Vendors in the ELM system are those who provide training content but who are not employed with the State of North Dakota. Setting up this information will include contact information, product descriptions and associated costs.

Procedure

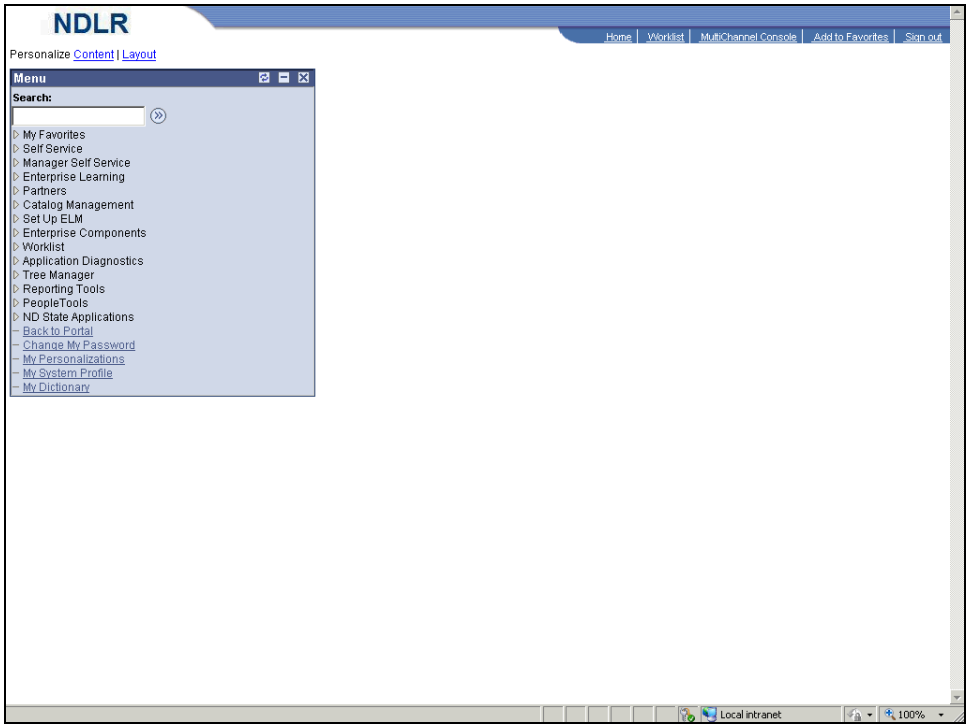
By the end of this topic, you will be able to:

- Navigate to the **Vendor Profile** page.
- Add a new vendor to the system.

Step	Action
1.	Begin by navigating to the **Vendor Profile** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

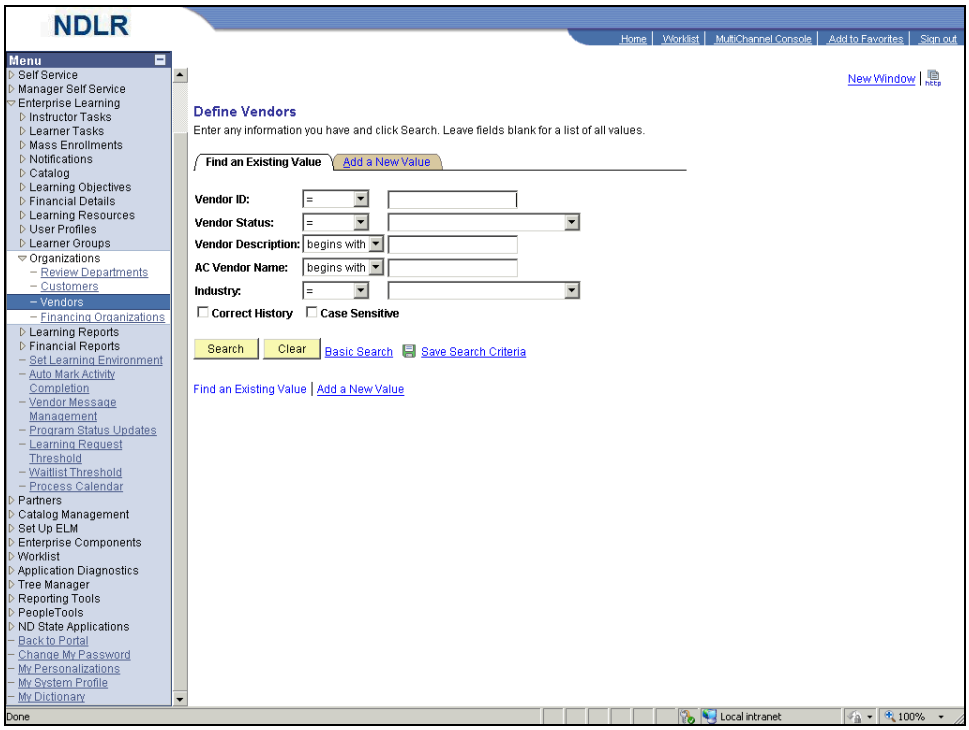


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

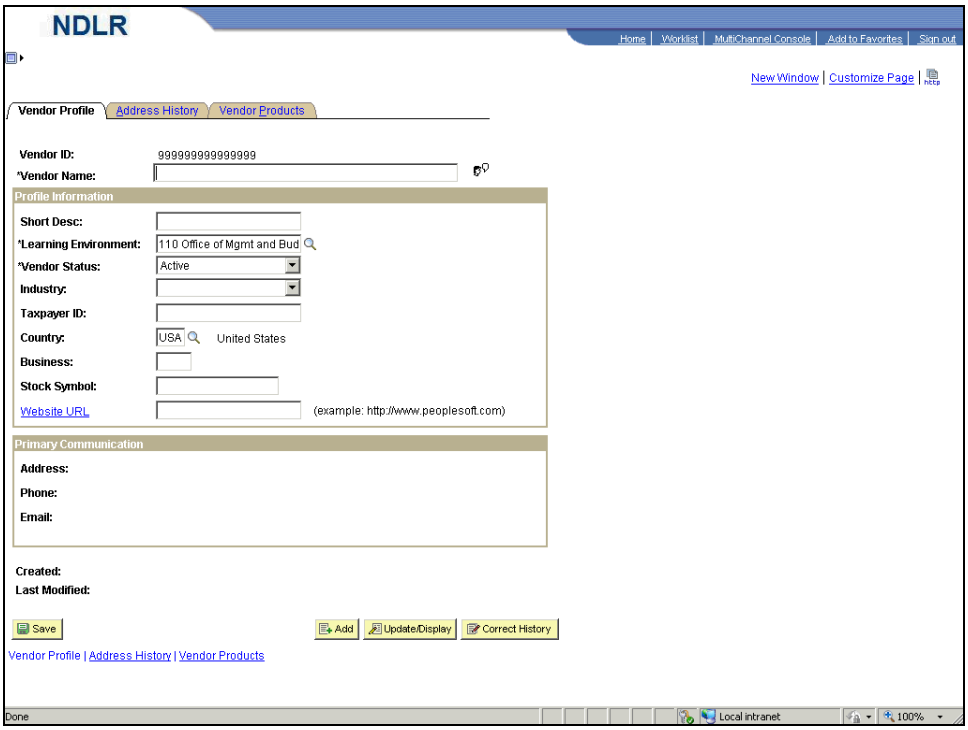


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

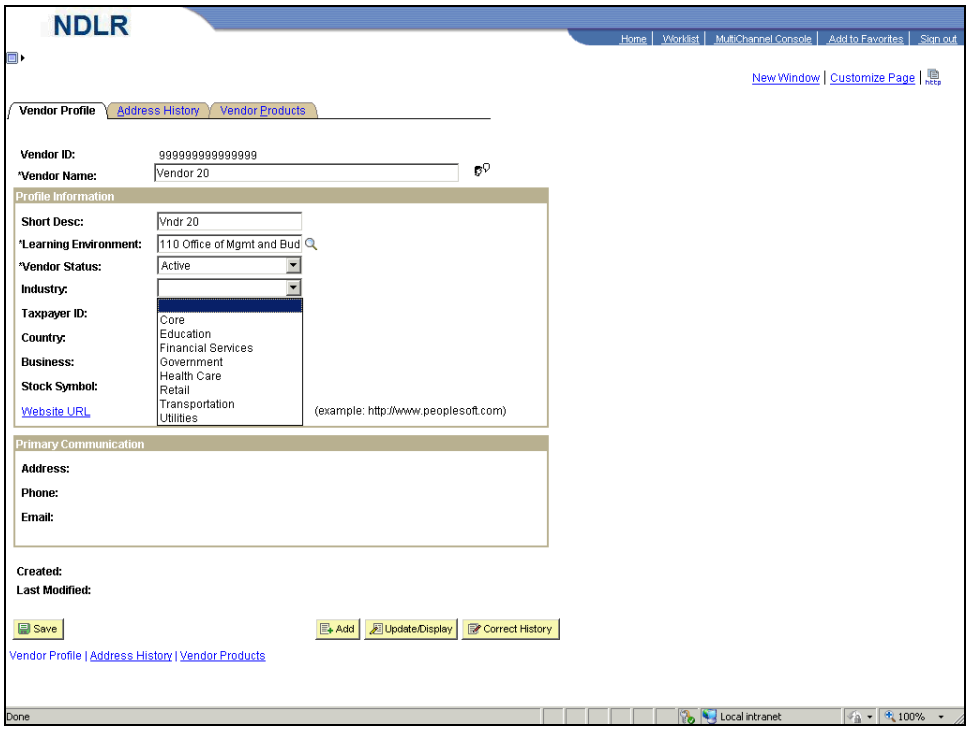
Step	Action
5.	Click the **Organizations** link. ▷ Organizations
6.	Click the **Vendors** link. – Vendors



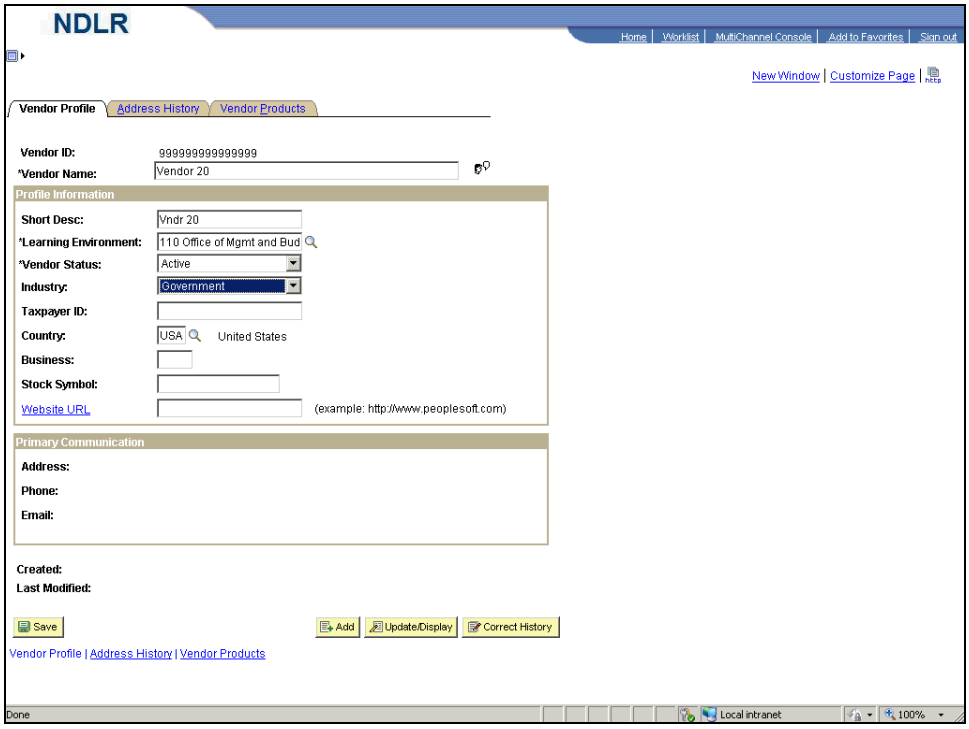
Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Add a New Value** tab.
9.	Use the **Vendor Profile** page to define a vendor in the **ELM** system.



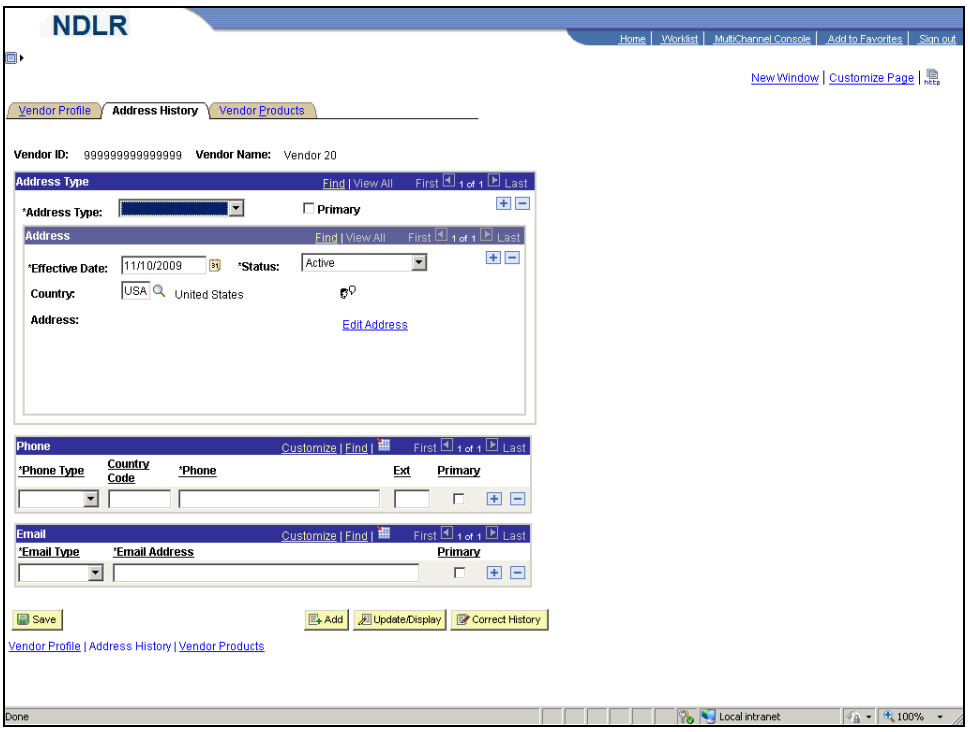
Step	Action
10.	Enter the desired information into the **Vendor Name** field. Enter "**Vendor 20**".
11.	Click in the **Short Desc** field.
12.	Enter the desired information into the **Short Desc** field. Enter "**Vndr 20**".
13.	The value in the **Learning Environment** field is inherited from the administrator and will be used to associate with the vendor. For this example, retain the default value.
14.	The **Vendor Status** can be Active or Inactive. For this example, retain the default value.
15.	Click the **Industry** list.



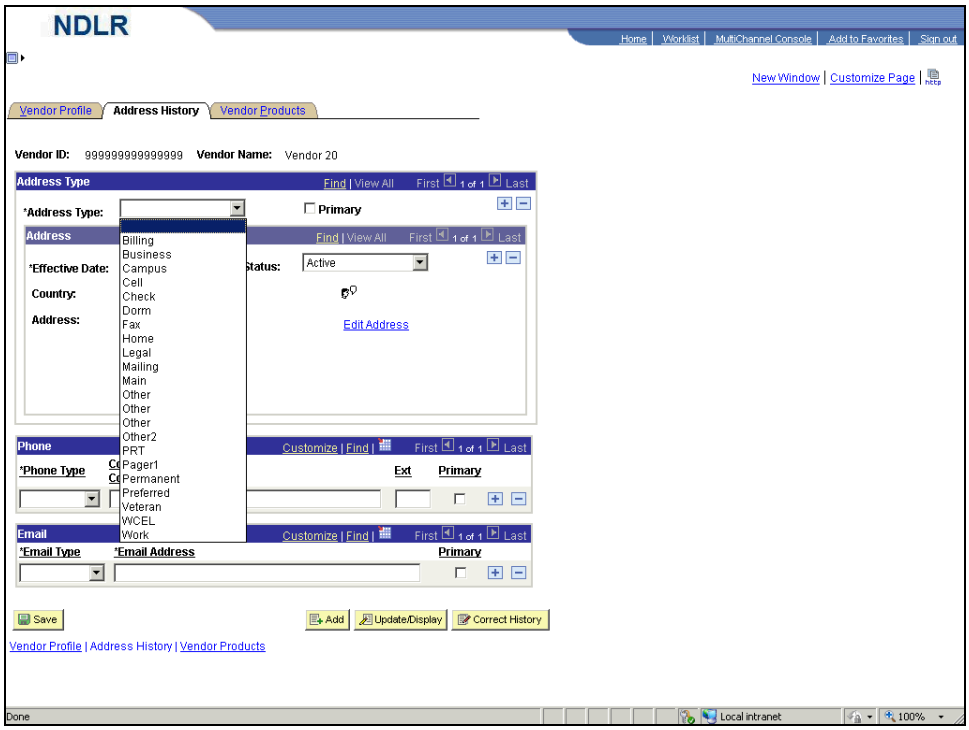
Step	Action
16.	Select the "**Government**" list item. Government



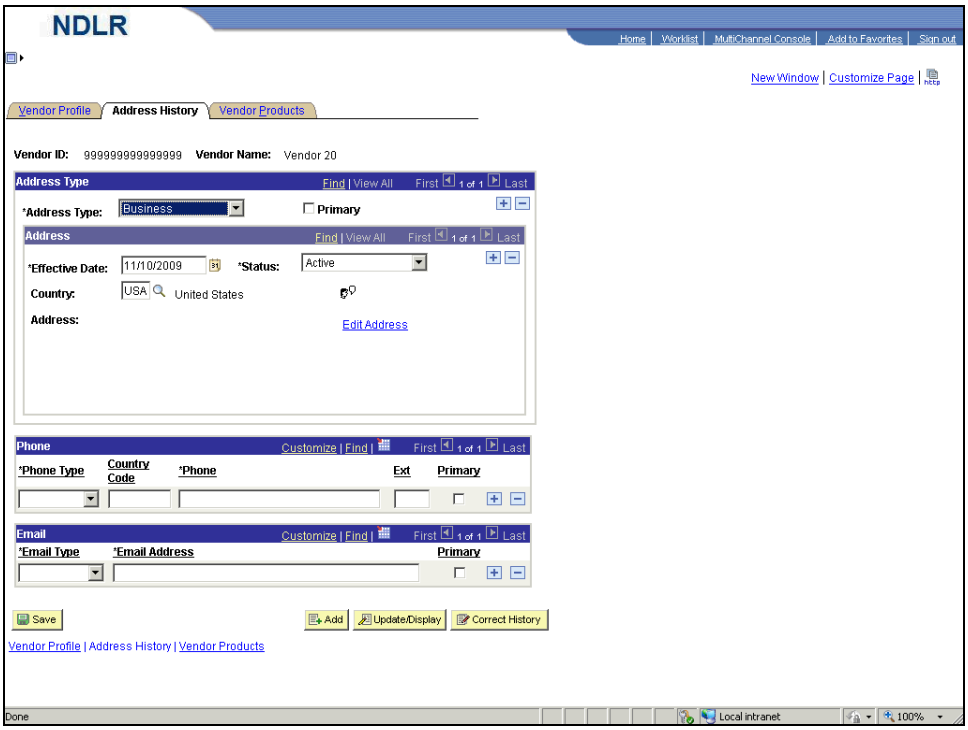
Step	Action
17.	Click the **Address History** tab. Address History
18.	Use the **Address History** page to define the vendor contact details including address, phone and email.



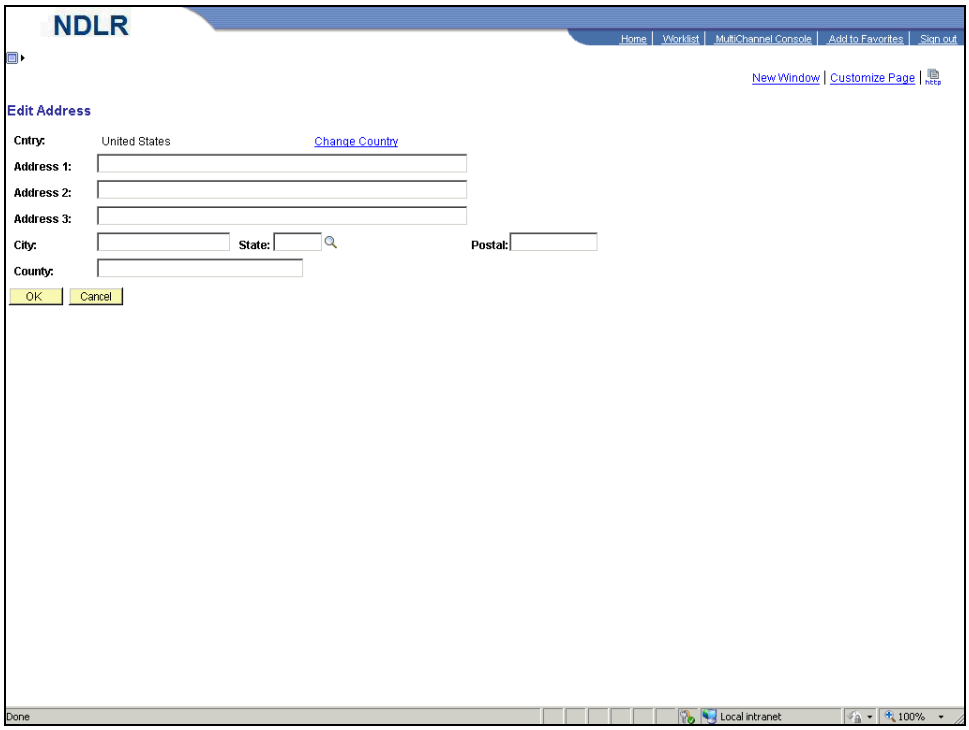
Step	Action
19.	Click the **Address Type** drop-down list.



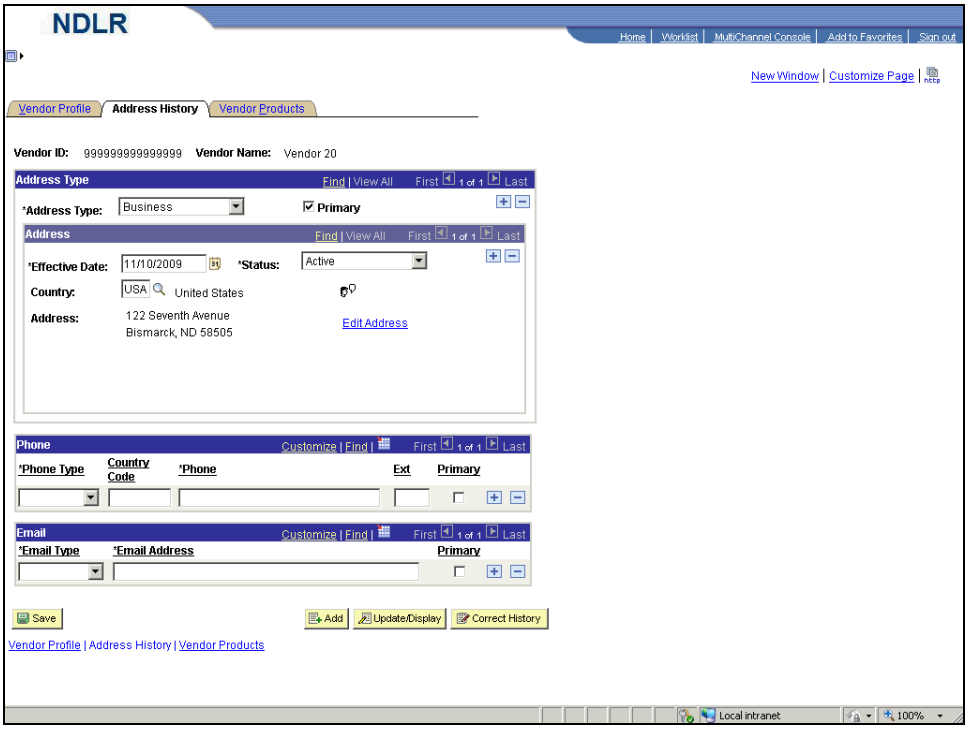
Step	Action
20.	Select the "**Business**" list item. Business
21.	Select the **Primary** option to identify an address as the preferred or primary address. **Note**: Every vendor must have a primary address.



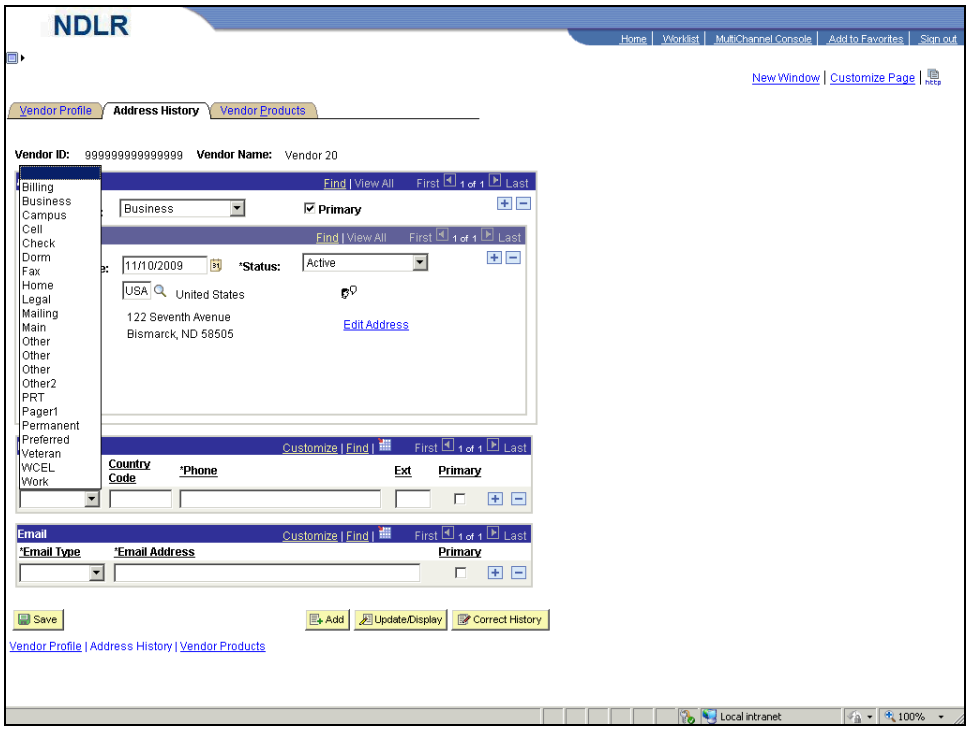
Step	Action
22.	Click the **Primary** option.
23.	Click the **Edit Address** link. Edit Address
24.	Use the **Edit Address** page to define the address details for a vendor.



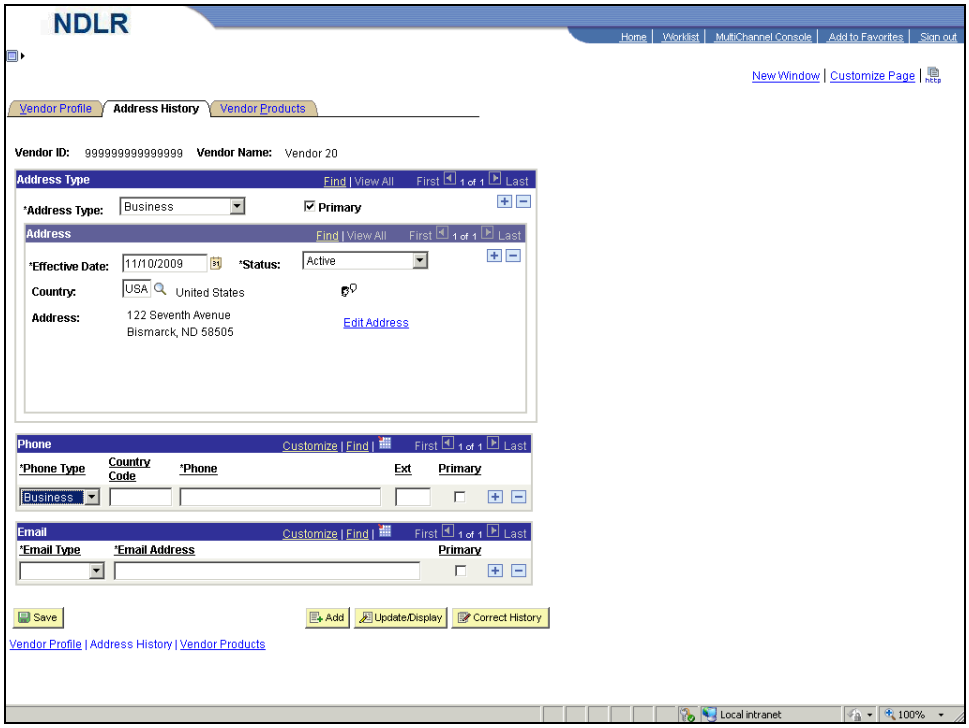
Step	Action
25.	Click in the **Address 1** field.
26.	Enter the desired information into the **Address 1** field. Enter "**122 Seventh Avenue**".
27.	Click in the **City** field.
28.	Enter the desired information into the **City** field. Enter "**Bismarck**".
29.	Click in the **State** field.
30.	Enter the desired information into the **State** field. Enter "**ND**".
31.	Click in the **Postal** field.
32.	Enter the desired information into the **Postal** field. Enter "**58505**".
33.	Click the **OK** button.



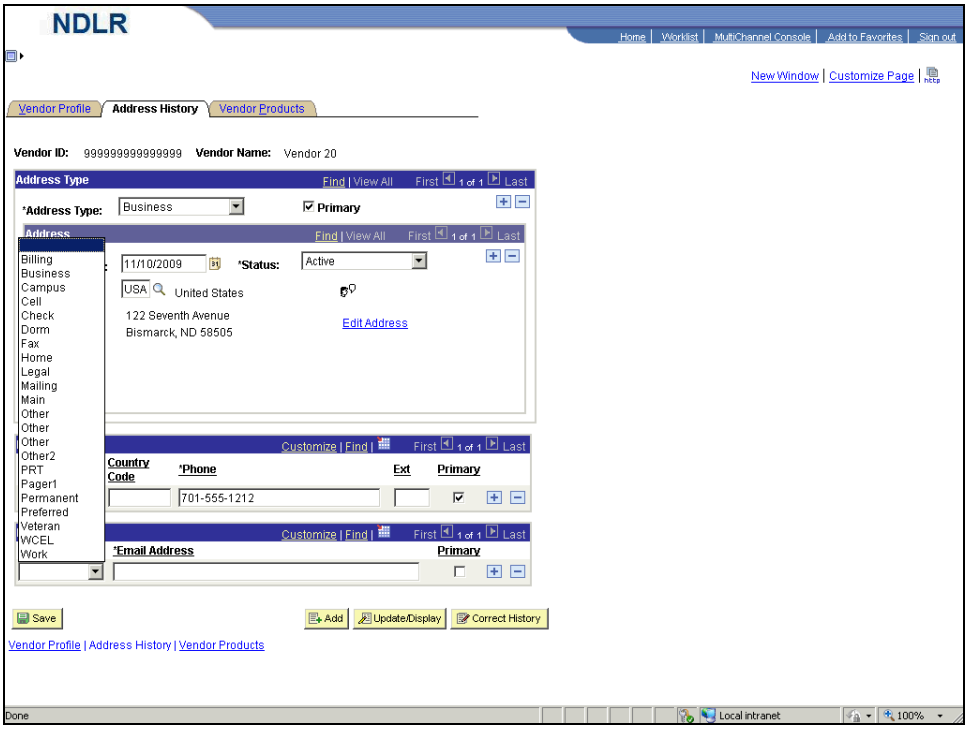
Step	Action
34.	Click the **Phone Type** drop-down list.



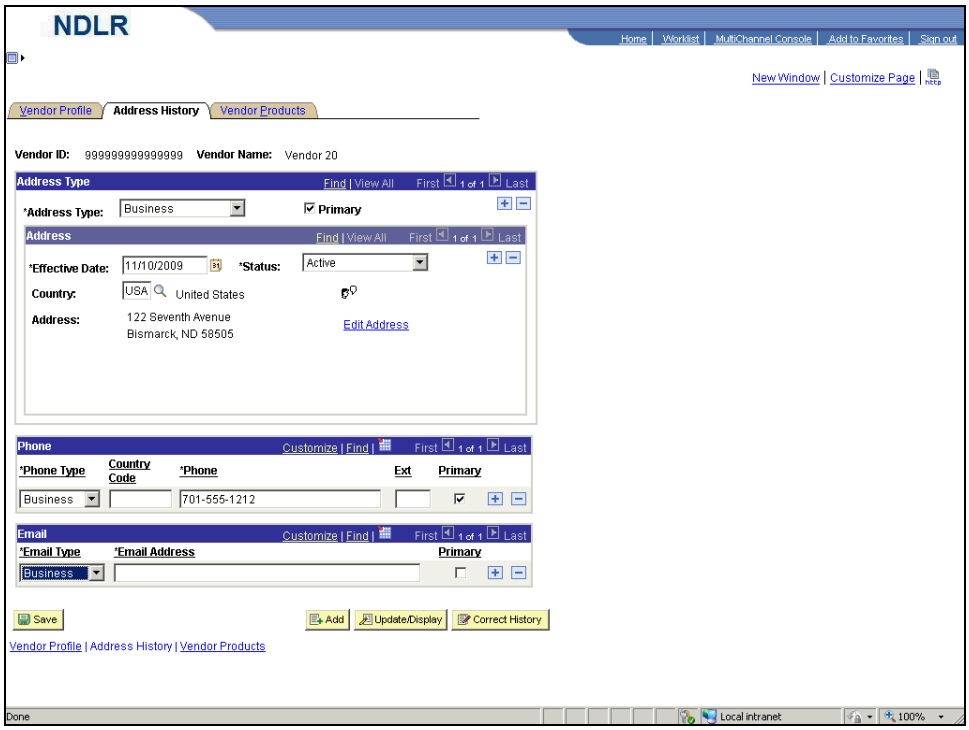
Step	Action
35.	Select the "**Business**" list item. Business



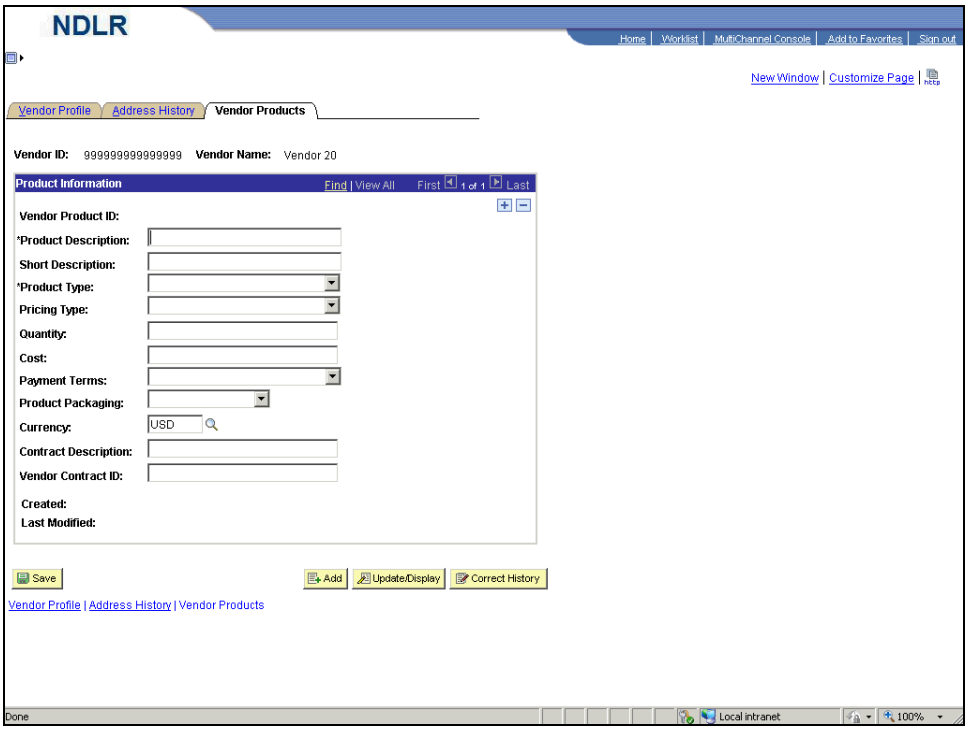
Step	Action
36.	Click in the **Phone** field.
37.	Enter the desired information into the **Phone** field. Enter "**701-555-1212**".
38.	You must designate one phone number as the **Primary** number for contacting the vendor.
39.	Click the **Primary** option.
40.	Click the **Email Type** drop-down list.



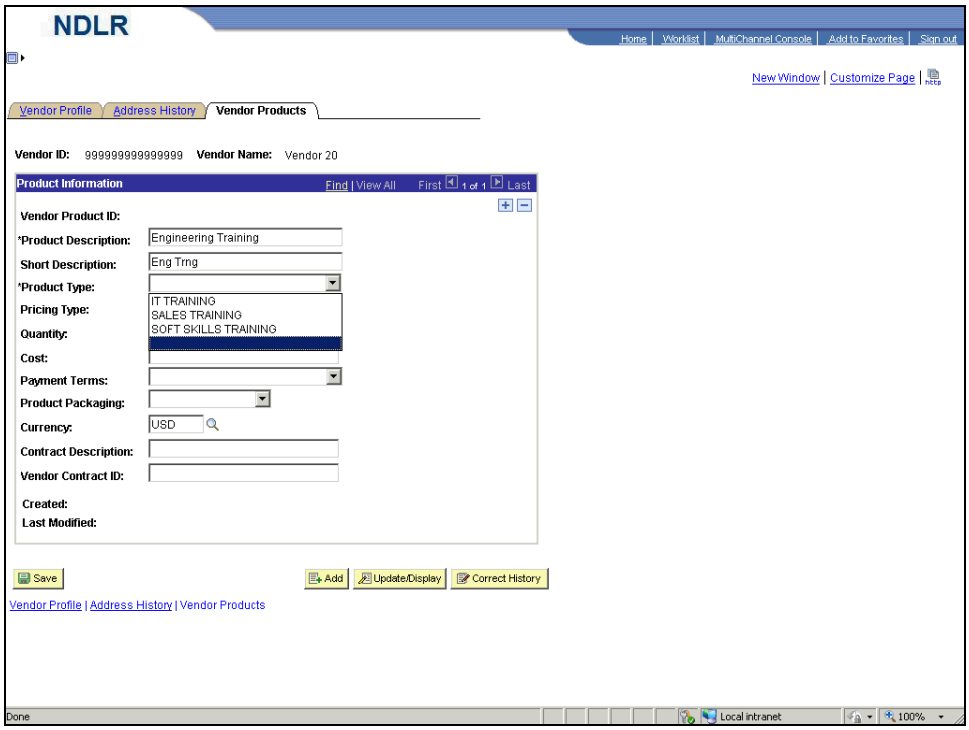
Step	Action
41.	Select the "**Business**" list item. Business



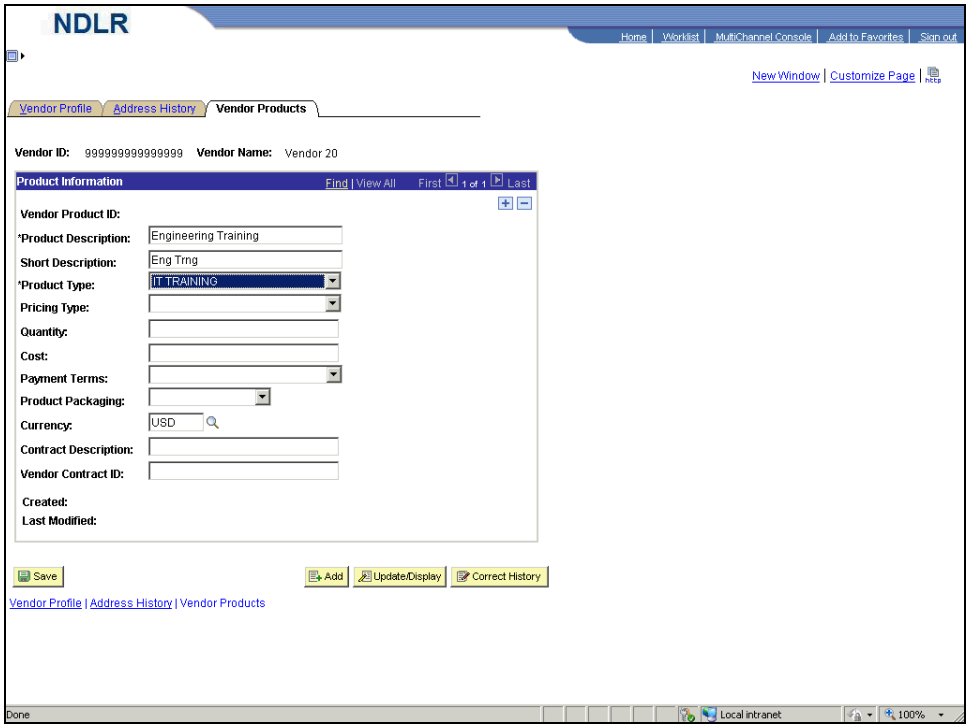
Step	Action
42.	Click in the **Email Address** field.
43.	Enter the desired information into the **Email Address** field. Enter "**vendor20@email.com**".
44.	You must designate one email address as the **Primary** address for contacting the vendor.
45.	Click the **Primary** option.
46.	Click the **Vendor Products** tab.
47.	Use the **Vendor Products** page to define learning related vendor product information.



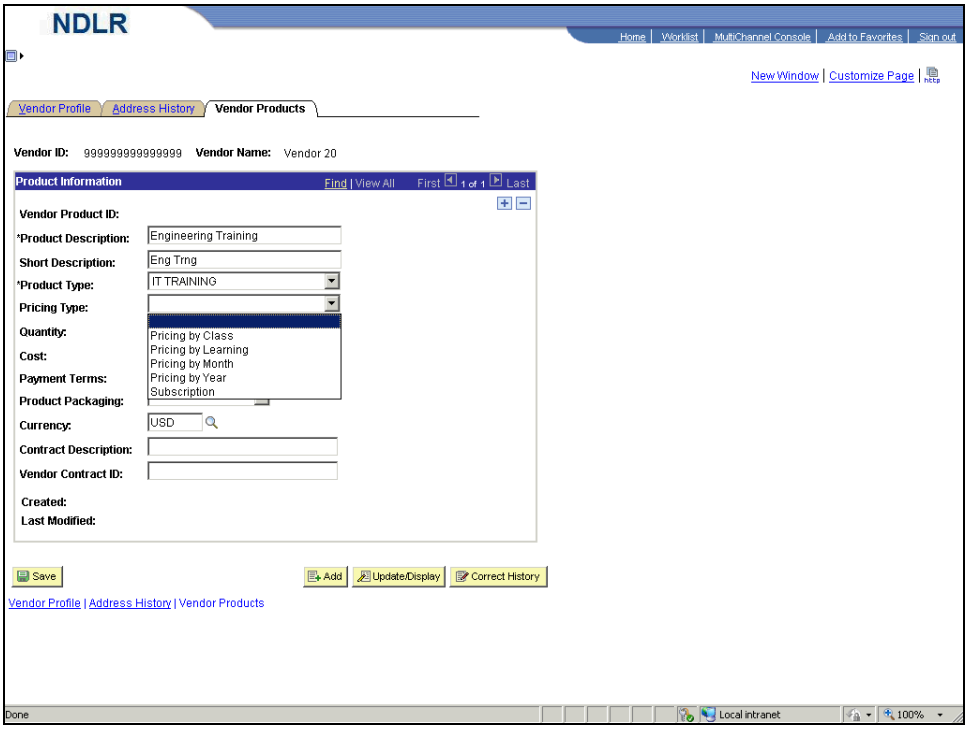
Step	Action
48.	Enter the desired information into the **Product Description** field. Enter "**Engineering Training**".
49.	Click in the **Short Description** field.
50.	Enter the desired information into the **Short Description** field. Enter "**Eng Trng**".
51.	Click the **Product Type** drop-down list.



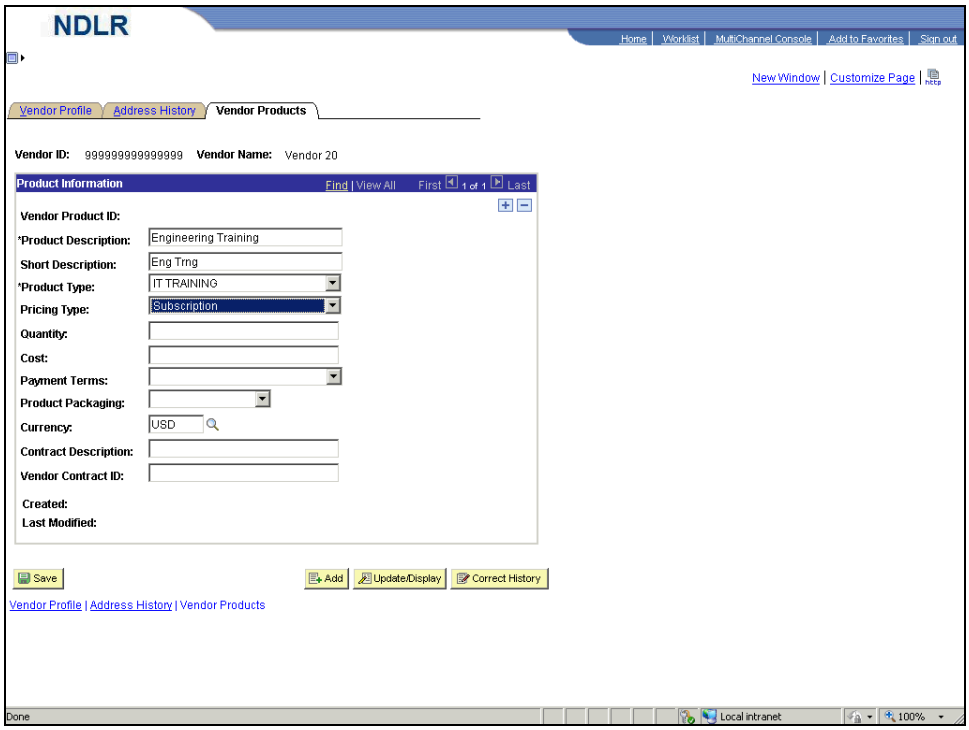
Step	Action
52.	Select the "**IT TRAINING**" list item. IT TRAINING



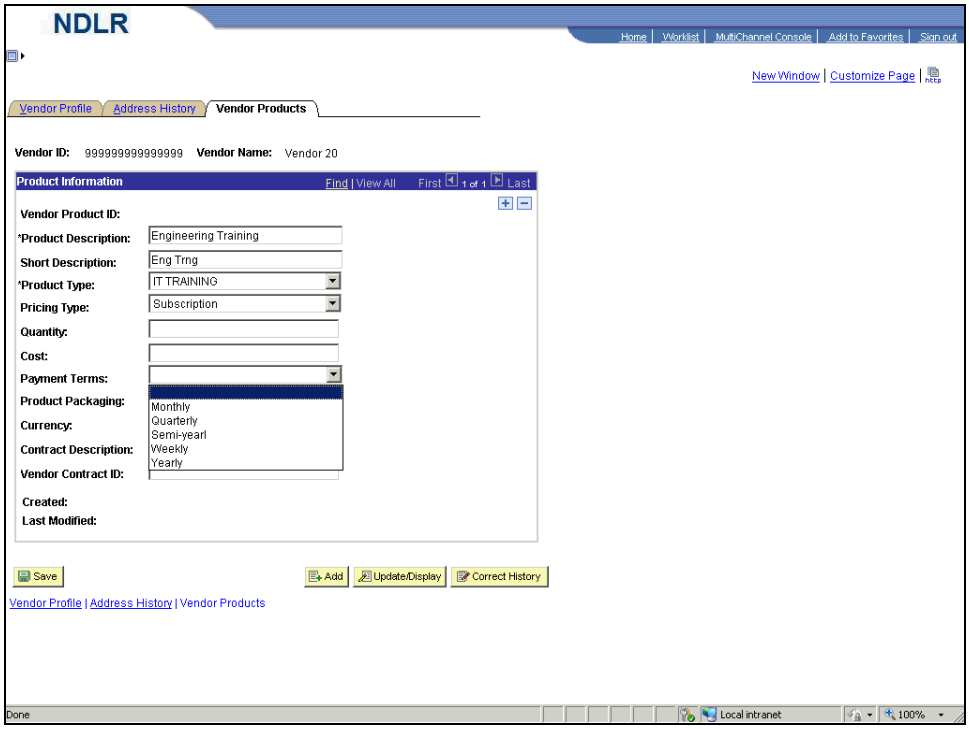
Step	Action
53.	Click the **Pricing Type** drop-down list.



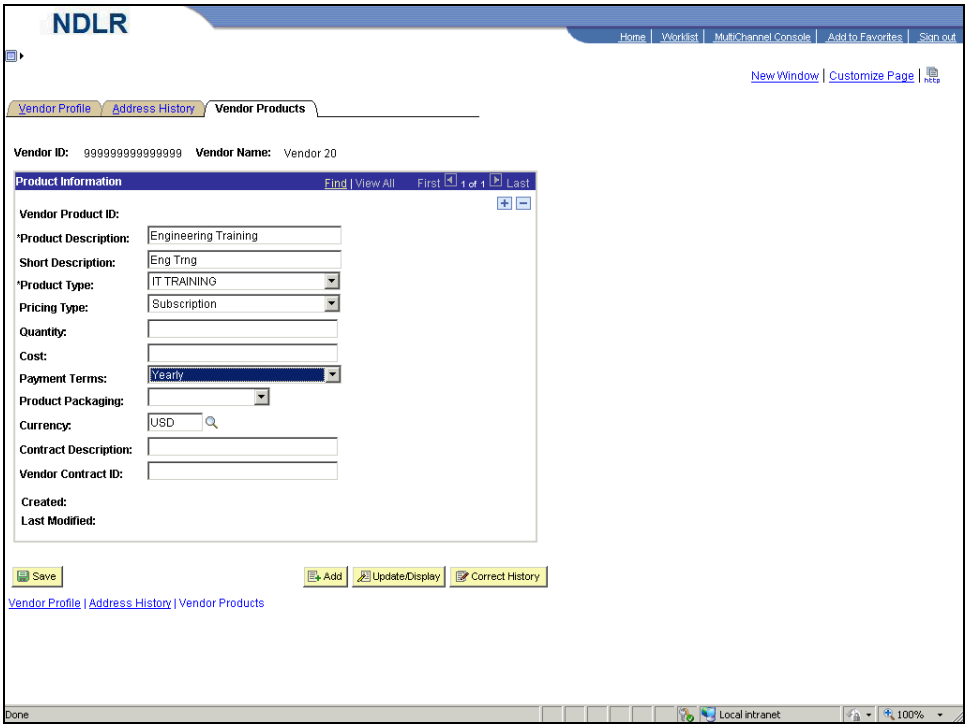
Step	Action
54.	Select the "**Subscription**" list item.



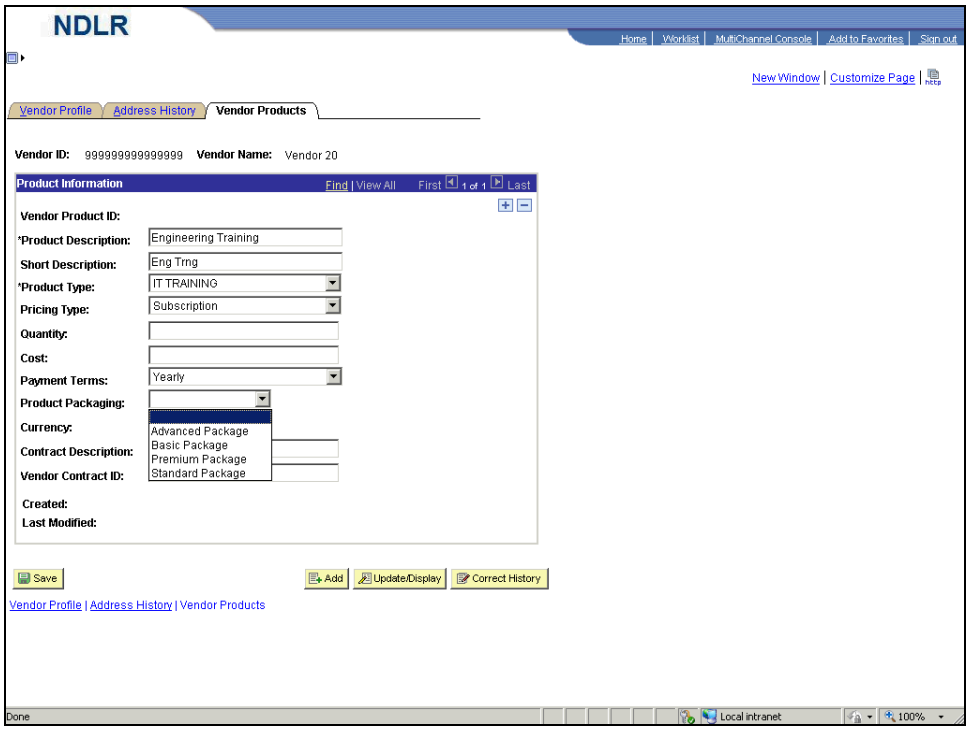
Step	Action
55.	Click the **Payment Terms** drop-down list.



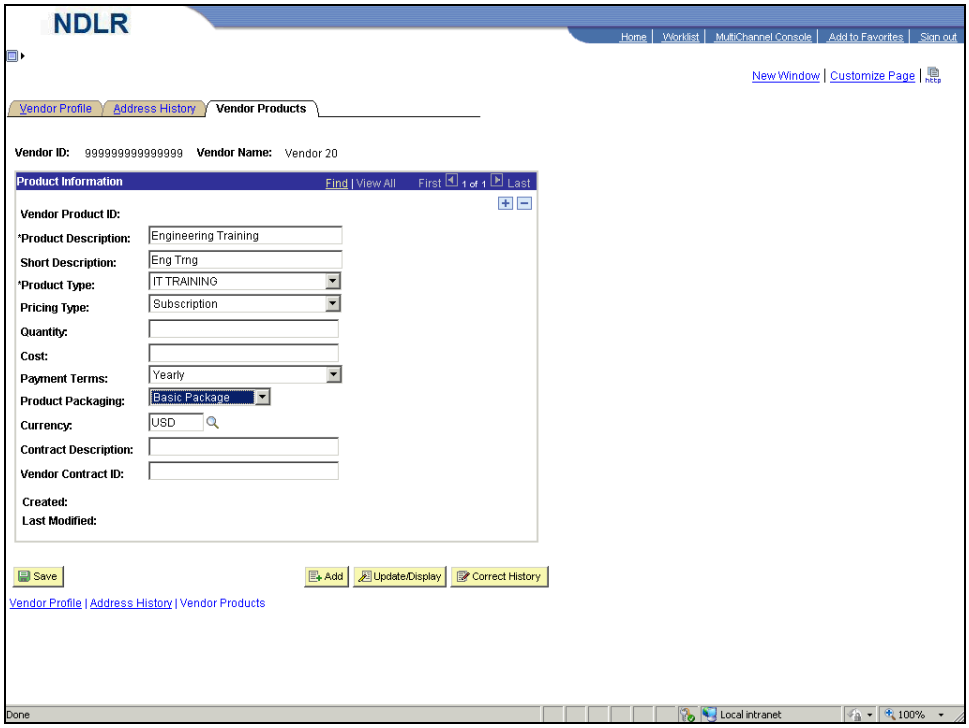
Step	Action
56.	Select the "**Yearly**" list item. Yearly



Step	Action
57.	Click the **Product Packaging** drop-down list.



Step	Action
58.	Select the "**Basic Package**" list item. Basic Package



Step	Action
59.	Click the **Save** button. Save
60.	Once the vendor profile information is saved, the system assigns a unique **Vendor ID** for the newly created vendor.
61.	**Congratulations**! You should now be able to: - Navigate to the **Vendor Profile** page. - Add a new vendor to the system. **End of Procedure.**

3.4 Creating Customer Profiles

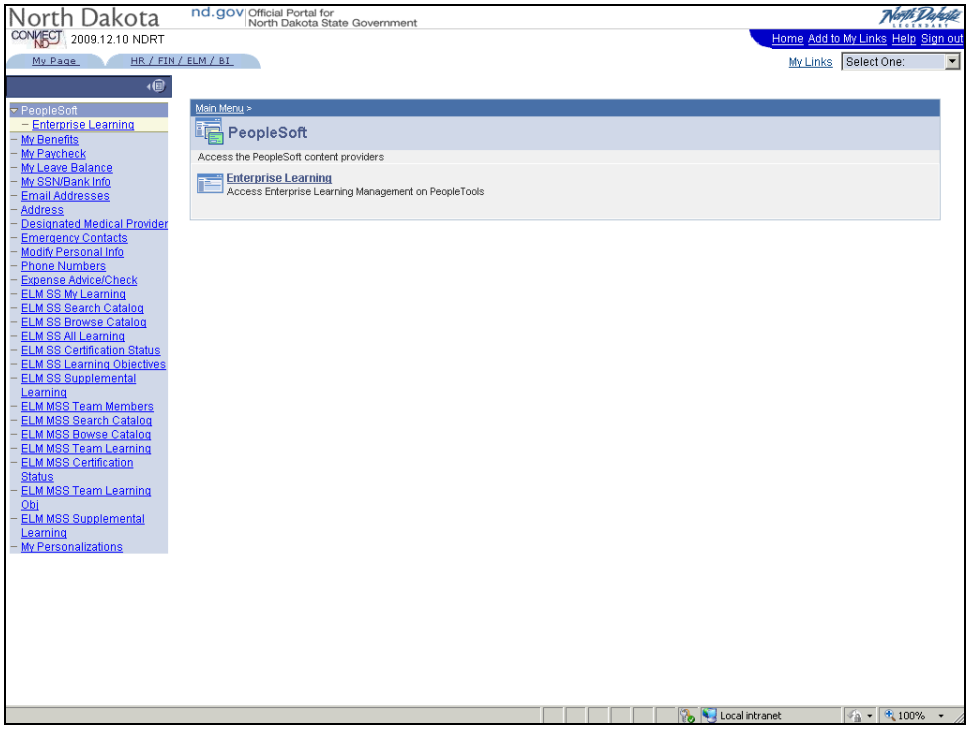
Customers represent organizations with learners who are external to your organization. All customer data is manually entered and maintained. There are no delivered jobs for synchronizing customer data with other enterprise systems.

Procedure

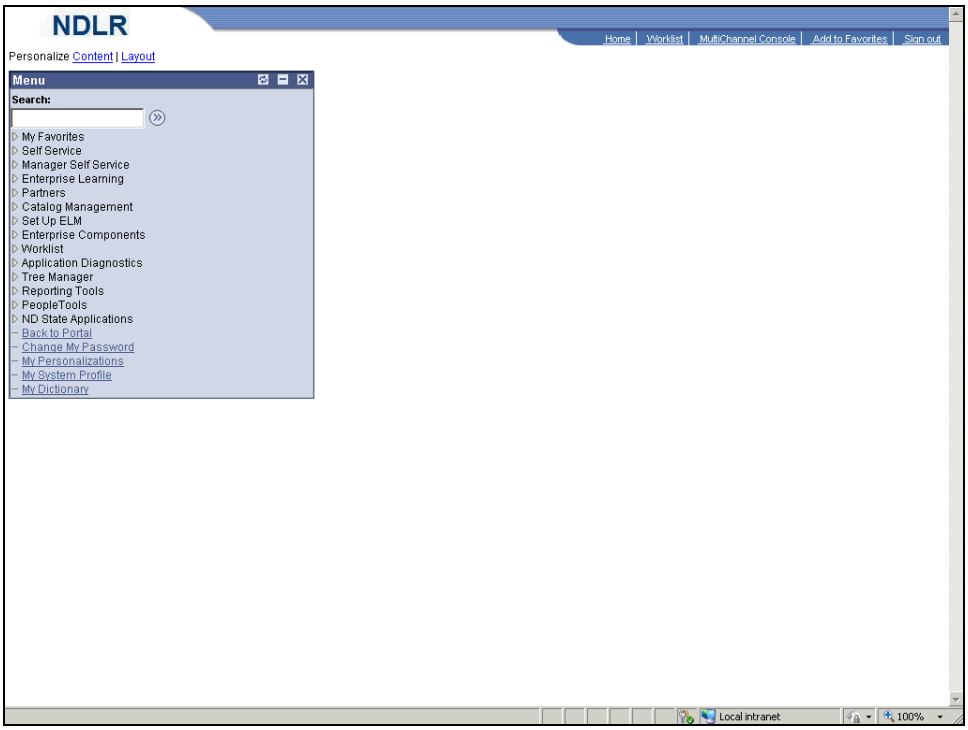
By the end of this topic, you will be able to:

- Navigate to the **Customer Profile** page.
- Add a new customer to the system.

Step	Action
1.	Begin by navigating to the **Customer Profile** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

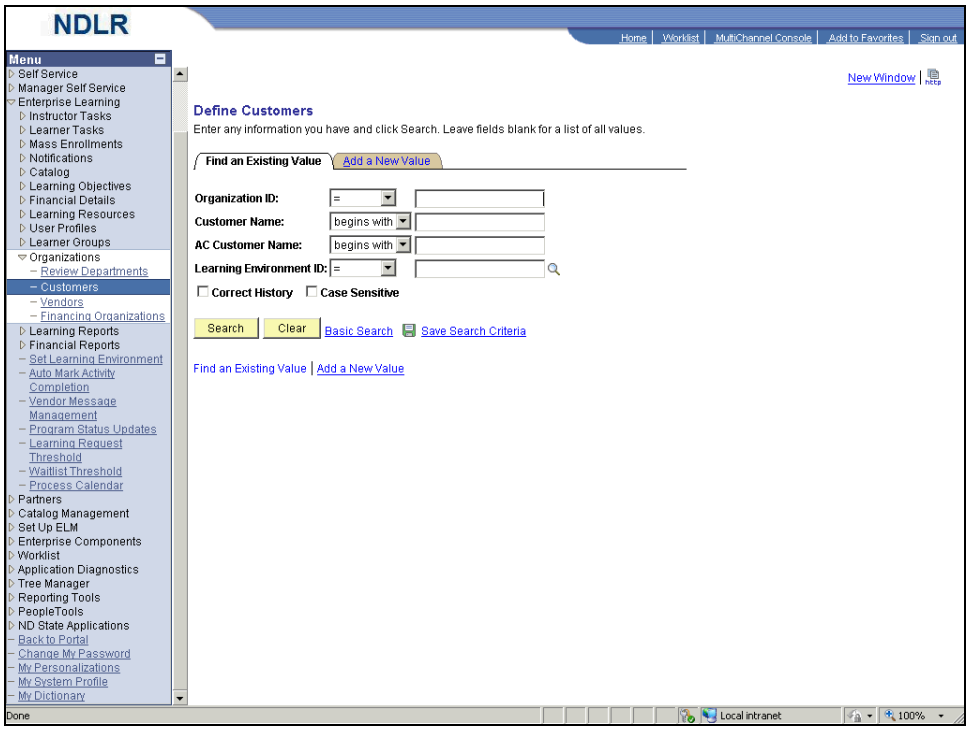


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

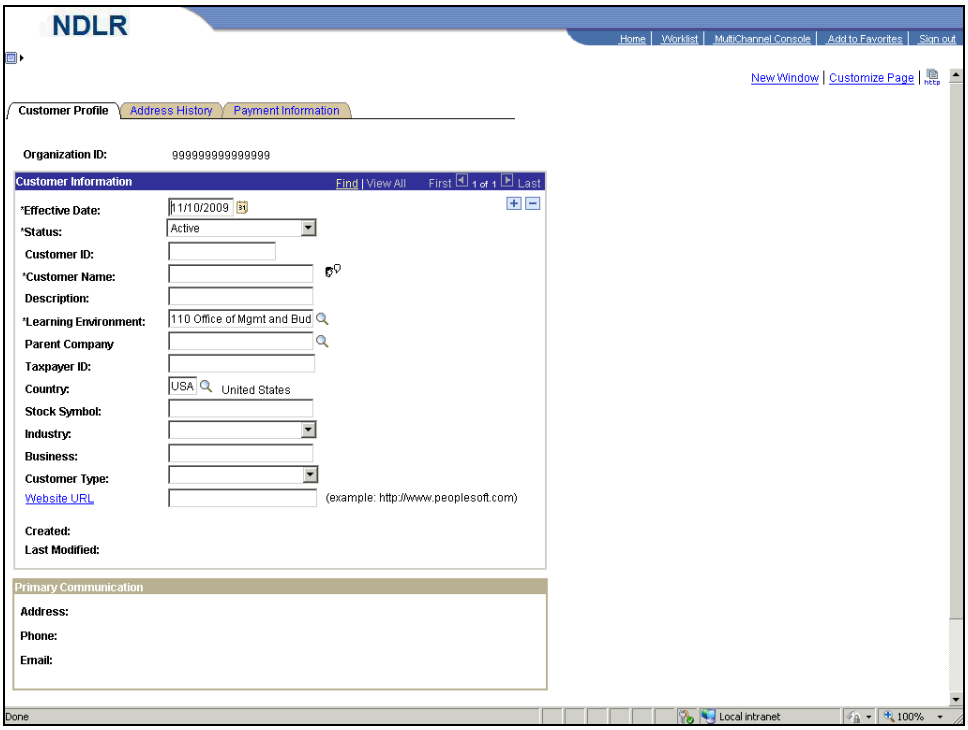


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

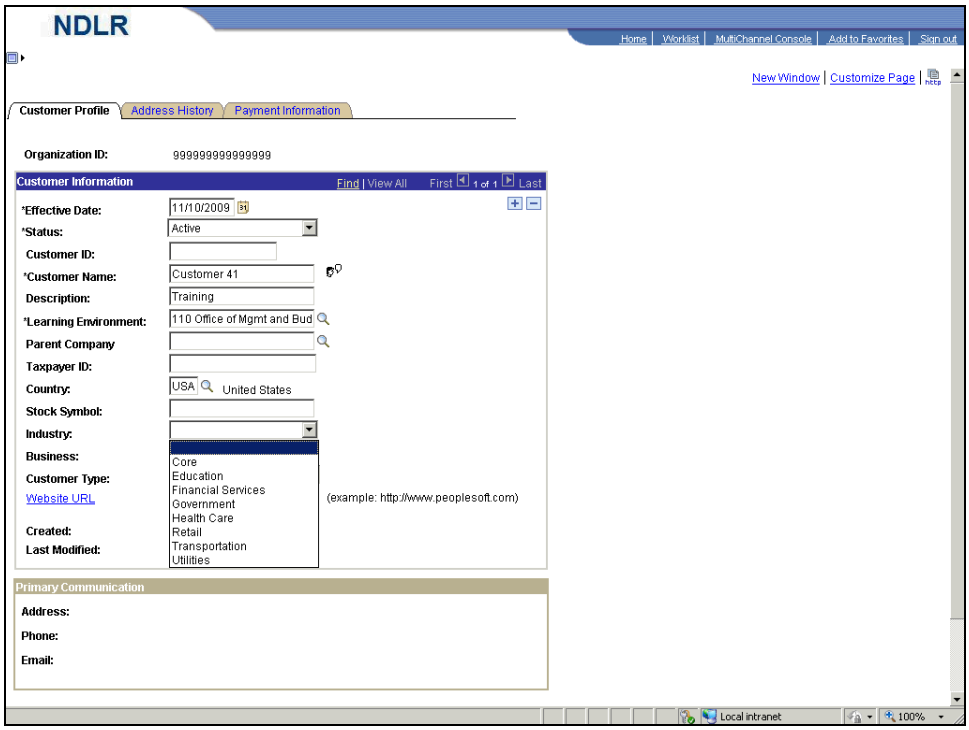
Step	Action
5.	Click the **Organizations** link. ▷ Organizations
6.	Click the **Customers** link. – Customers



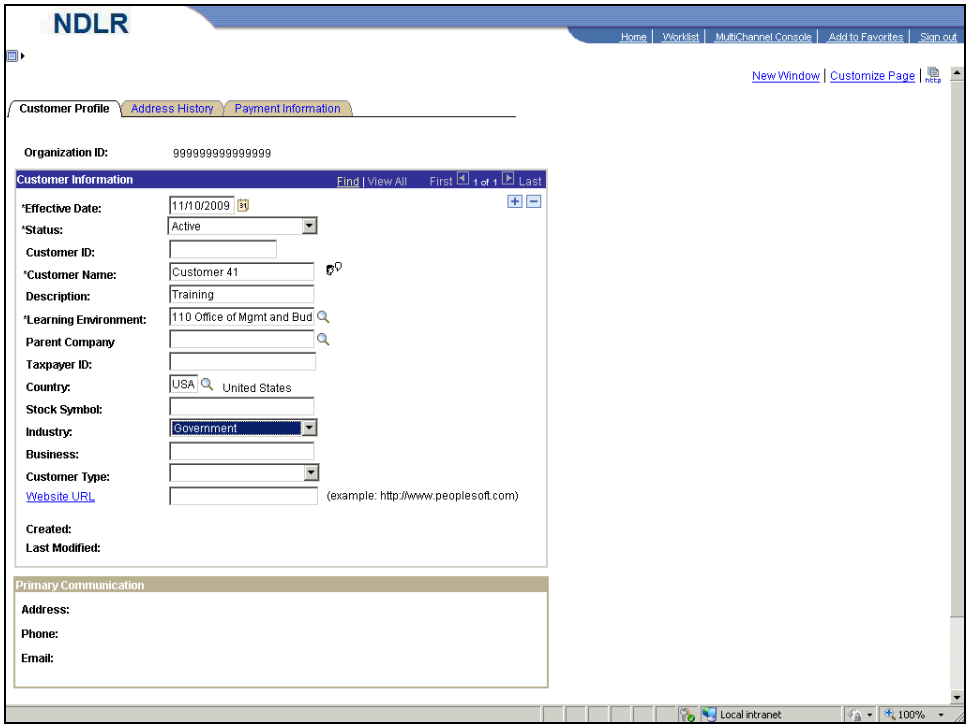
Step	Action
7.	Click the **Collapse Menu** button. ⊟
8.	Click the **Add a New Value** tab. Add a New Value
9.	Use the **Customer Profile** page to define a customer in the **ELM** system.



Step	Action
10.	Click in the **Customer Name** field.
11.	Enter the desired information into the **Customer Name** field. Enter "**Customer 41**".
12.	Click in the **Description** field.
13.	Enter the desired information into the **Description** field. Enter "**Training**".
14.	The **Parent Company** is the agency which maintains the customer and it associates a customer with the State agency. All Parent Companies must be set up as a vendor before being set up under the Customer Profile section.
15.	Click the **Industry** drop-down list.



Step	Action
16.	Select the "**Government**" list item. Government

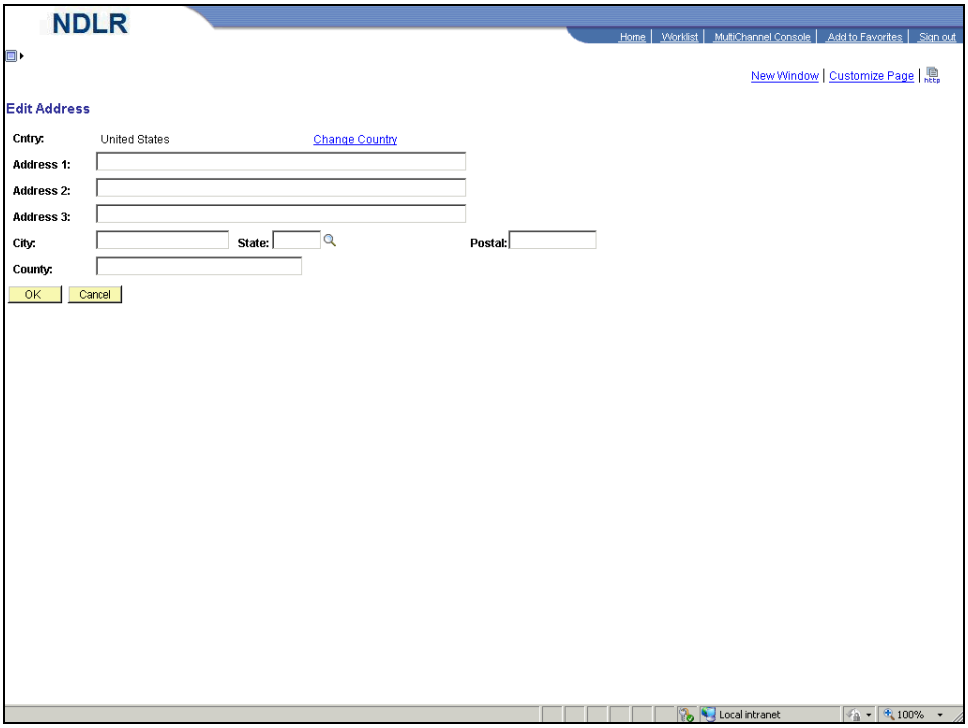


Step	Action
17.	Click the **Address History** tab. Address History
18.	Use the **Address History** page to define customer contact details including address, phone and email.

Step	Action
19.	Click the **Address Type** drop-down list.

Step	Action
20.	Select the "**Business**" list item. Business

Step	Action
21.	Click the **Edit Address** link. Edit Address



Step	Action
22.	Click in the **Address 1** field.
23.	Enter the desired information into the **Address 1** field. Enter "**126 Seventh Avenue**".
24.	Click in the **City** field.
25.	Enter the desired information into the **City** field. Enter "**Bismarck**".
26.	Click in the **State** field.
27.	Enter the desired information into the **State** field. Enter "**ND**".

Step	Action
28.	Click in the **Postal** field.
29.	Enter the desired information into the **Postal** field. Enter "**58505**".
30.	Click the **OK** button.

Step	Action
31.	Click the **Primary** option.
32.	Click the **Phone Type** drop-down list.

Step	Action
33.	Select the "**Business**" list item. Business

Step	Action
34.	Click in the **Phone** field.
35.	Enter the desired information into the **Phone** field. Enter "**701-555-1111**".
36.	Click the **Primary** option.
37.	Click the **Email Type** drop-down list.

Step	Action
38.	Select the "**Business**" list item. Business

Step	Action
39.	Click in the **Email Address** field.
40.	Enter the desired information into the **Email Address** field. Enter "**customer41@email.com**".
41.	Click the **Primary** option.
42.	Click the **Save** button. Save
43.	**Congratulations**! You should now be able to: - Navigate to the **Customer Profile** page. - Add a new customer to the system. **End of Procedure.**

3.5 Creating External Learner Profiles

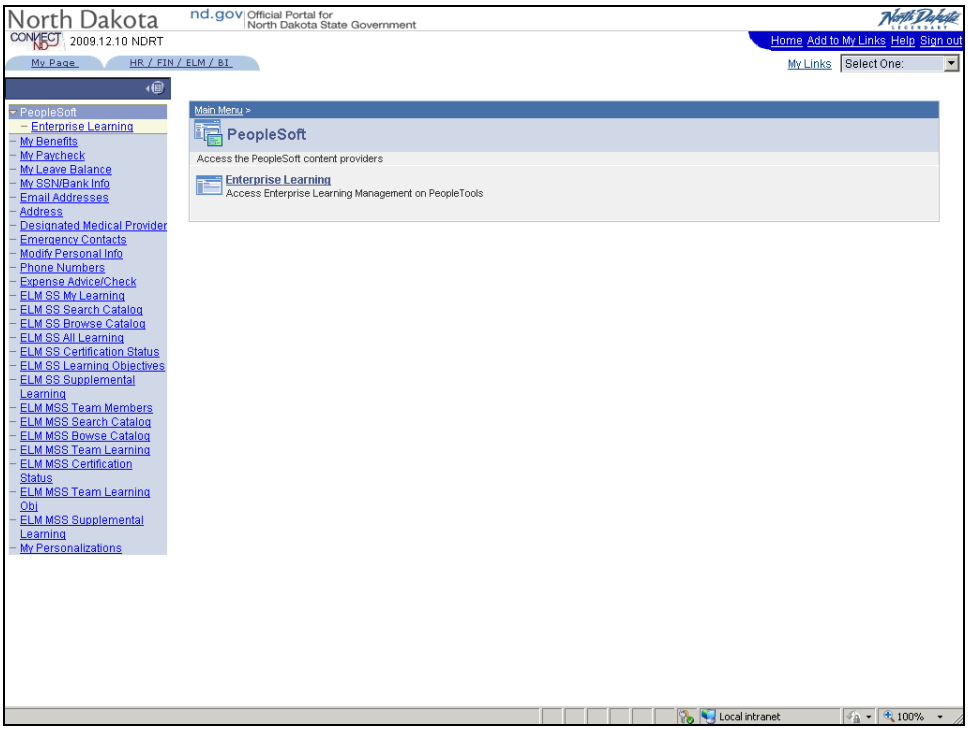
Every Learner, Manager, Instructor and Administrator must have a learner profile to use the **Enterprise Learning Management** system. A profile identifies basic informational data like: a learners name, contact information, job information and learning preferences. The profile also identifies the learning environment with which the user is associated.

Procedure

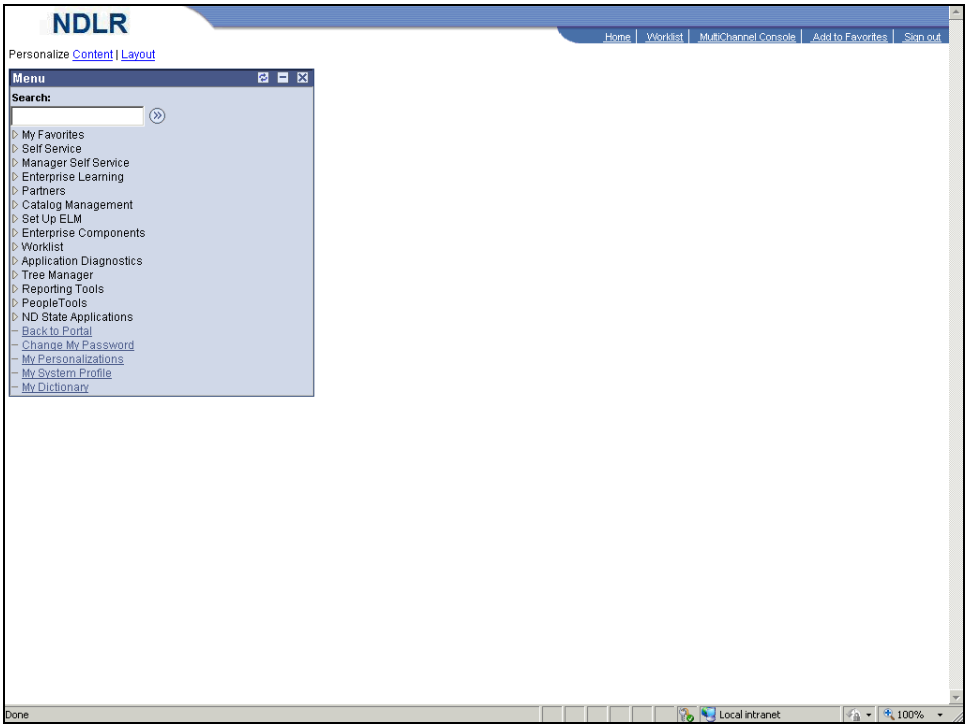
By the end of this topic, you will be able to:

- Navigate to the **Profile Info** page.
- Create external learner profiles.

Step	Action
1.	Begin by navigating to the **Profile Info** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

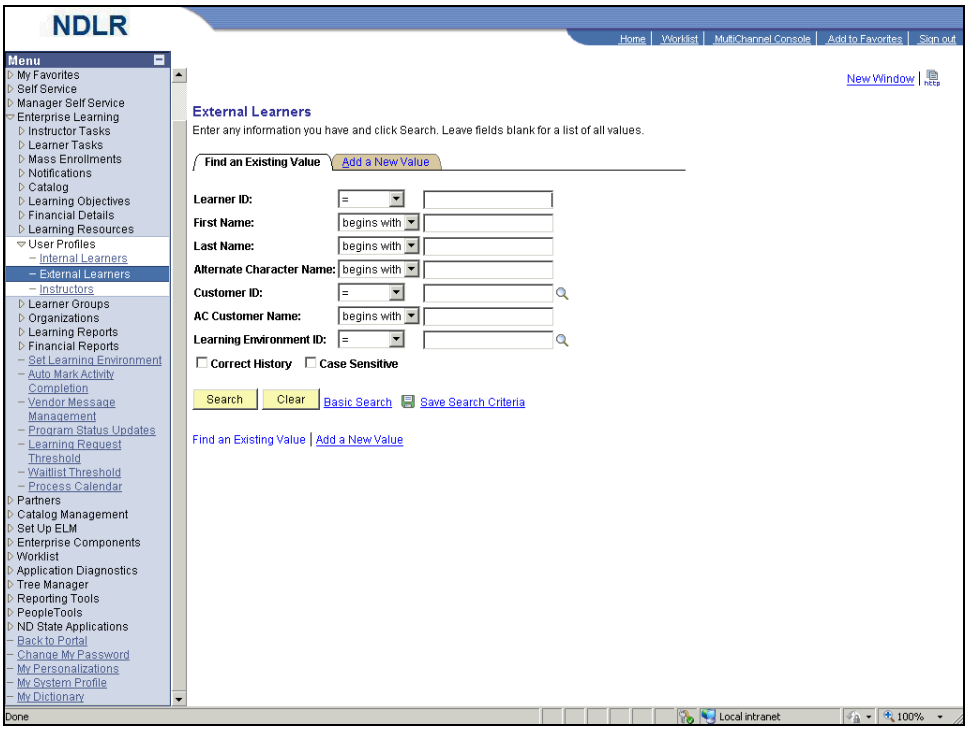


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

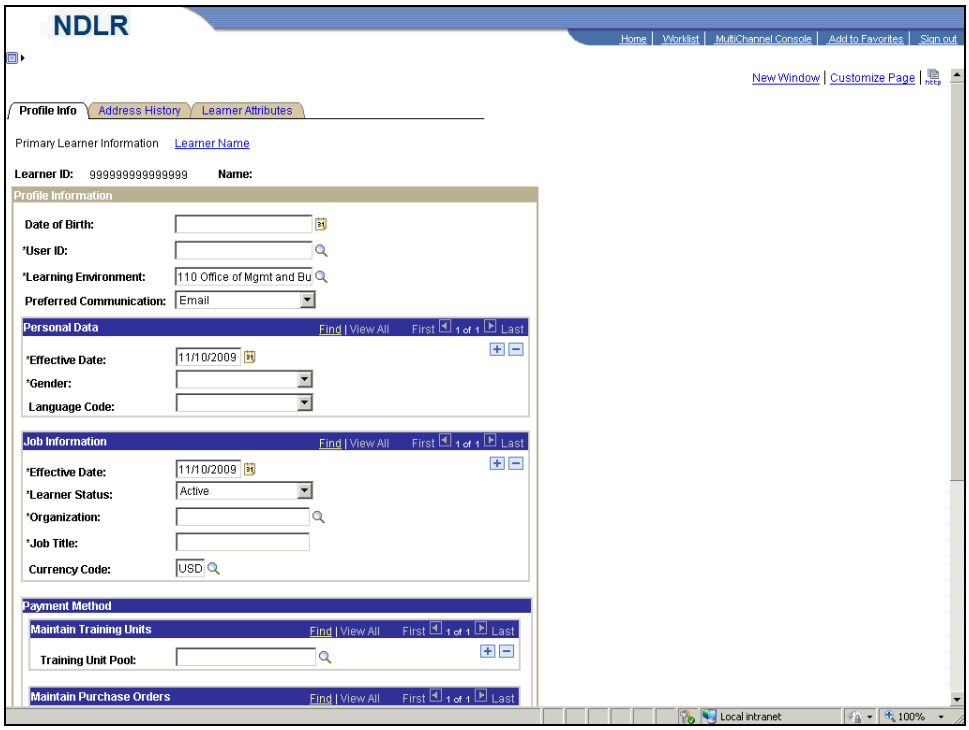


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

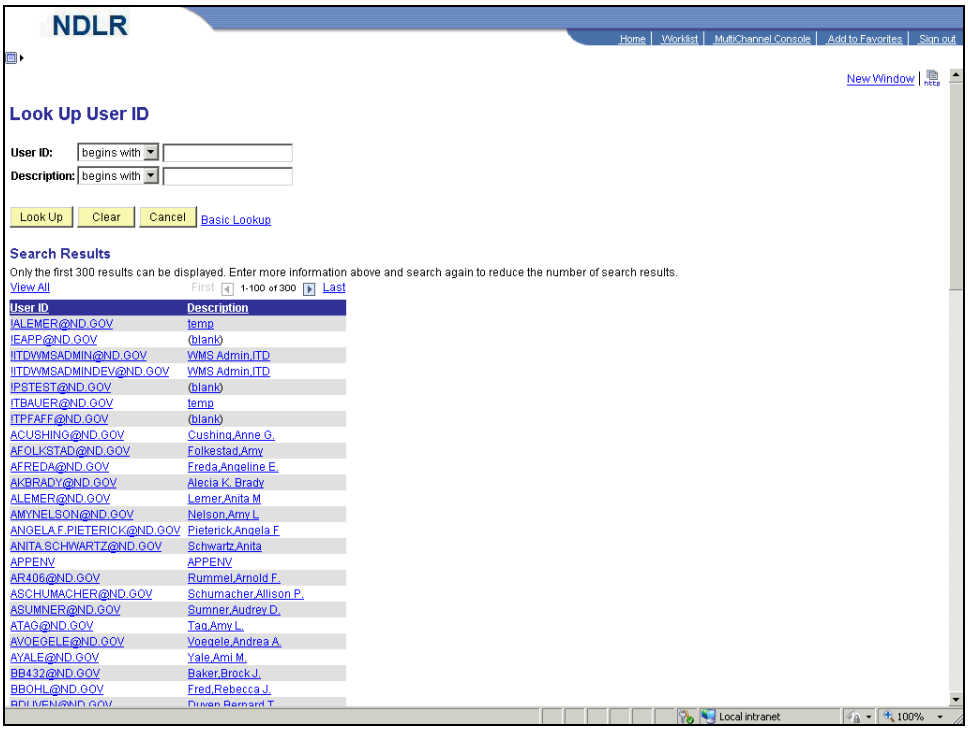
Step	Action
5.	Click the **User Profiles** link. ▷ User Profiles
6.	Click the **External Learners** link. – External Learners



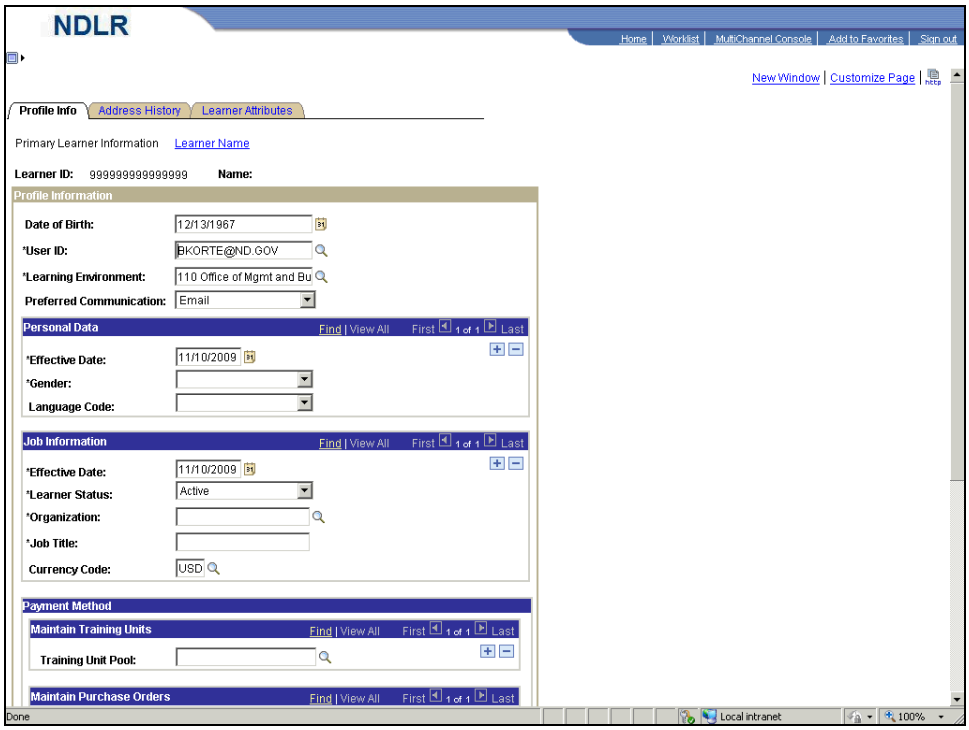
Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Add a New Value** tab. Add a New Value
9.	Use the **Profile Info** page to select the learner's User ID, learning environment and organization.



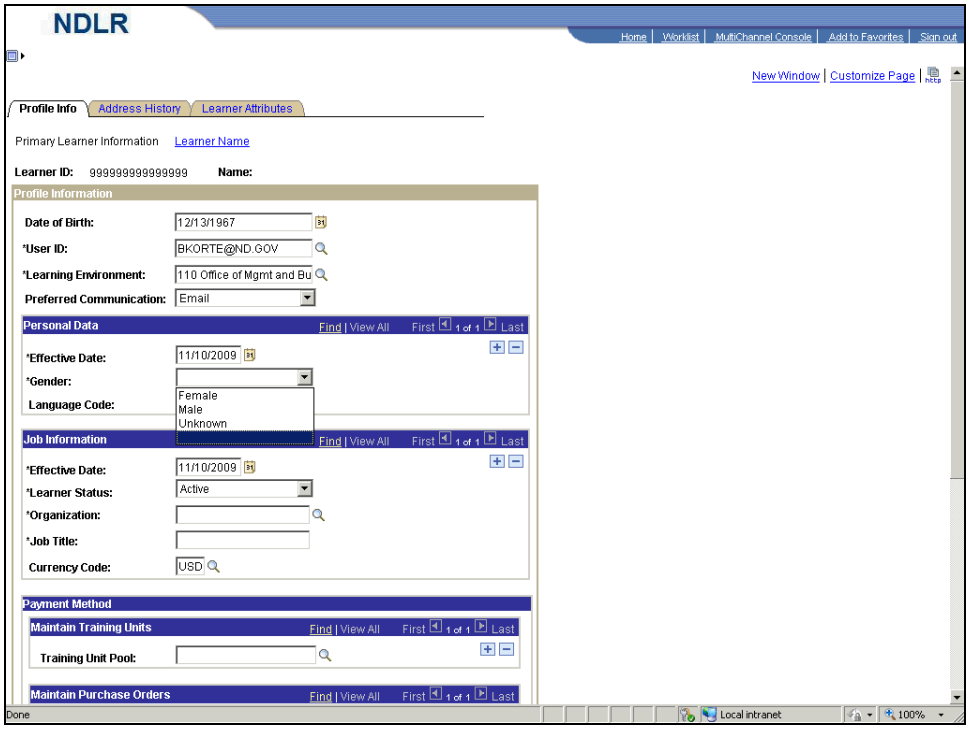
Step	Action
10.	Click in the **Date of Birth** field.
11.	Enter the desired information into the **Date of Birth** field. Enter "**12/13/1967**".
12.	Click the **User ID Lookup** button.



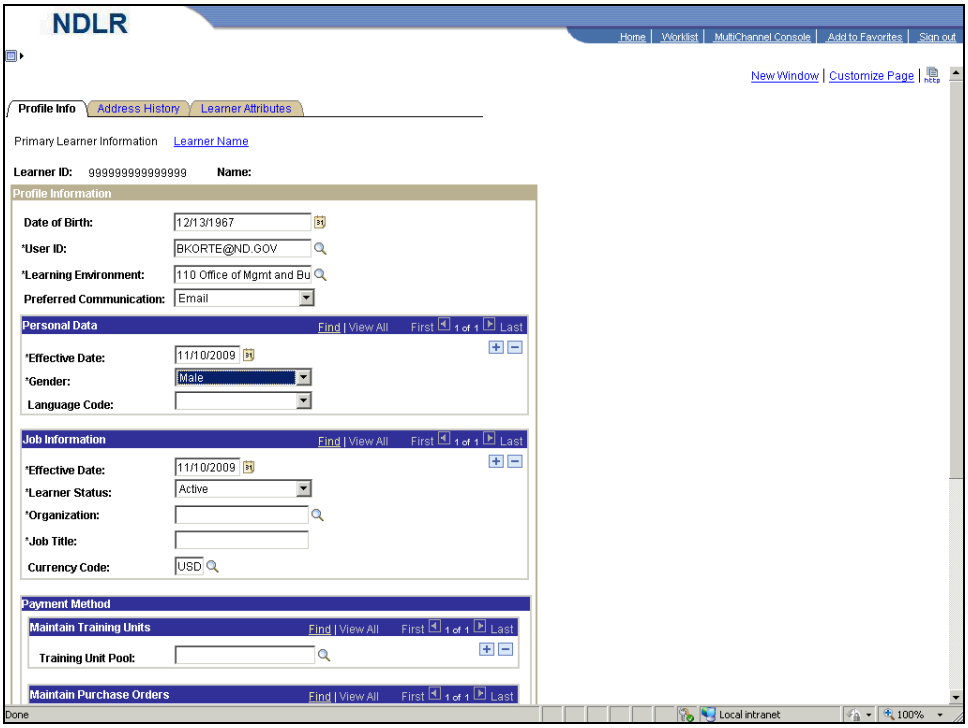
Step	Action
13.	Click in the **User ID** field.
14.	Enter the desired information into the **User ID** field. Enter "**bkorte**".
15.	Click the **Look Up** button. Look Up
16.	Select the "**BKORTE@ND.GOV**" list item. BKORTE@ND.GOV Korte,Bruce A.



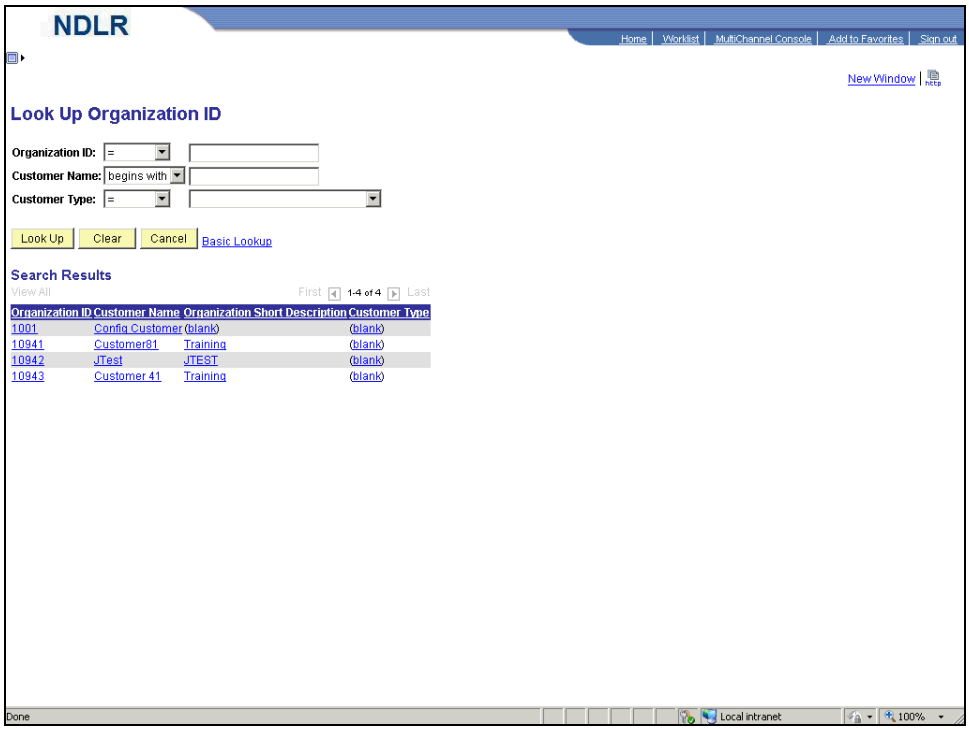
Step	Action
17.	Click the **Gender** drop-down list.



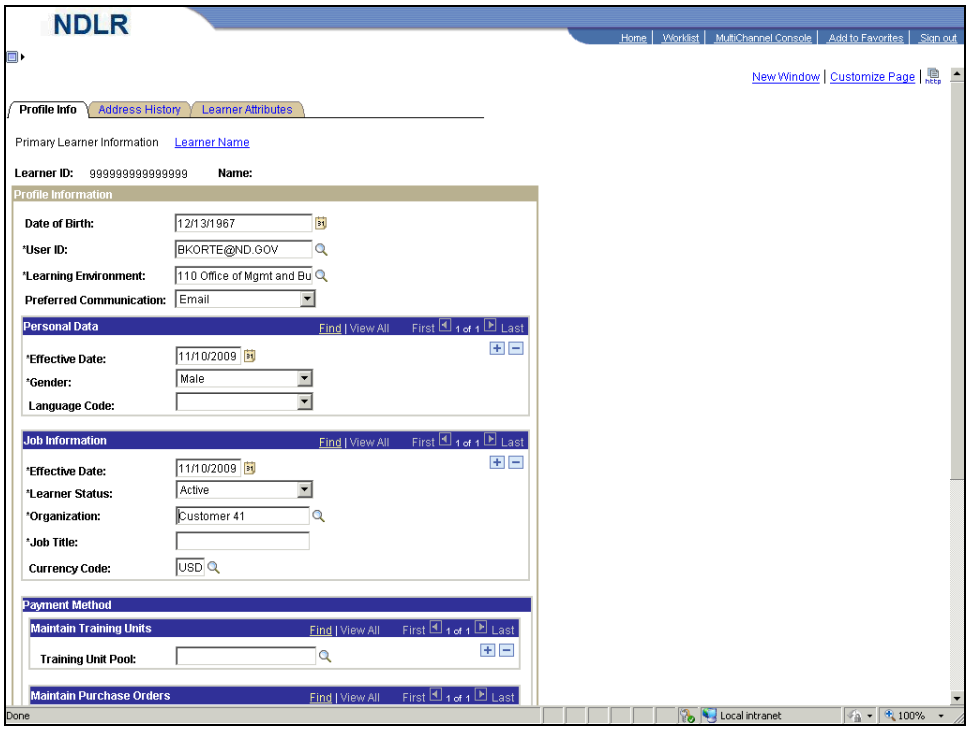
Step	Action
18.	Select the "**Male**" list item. Male



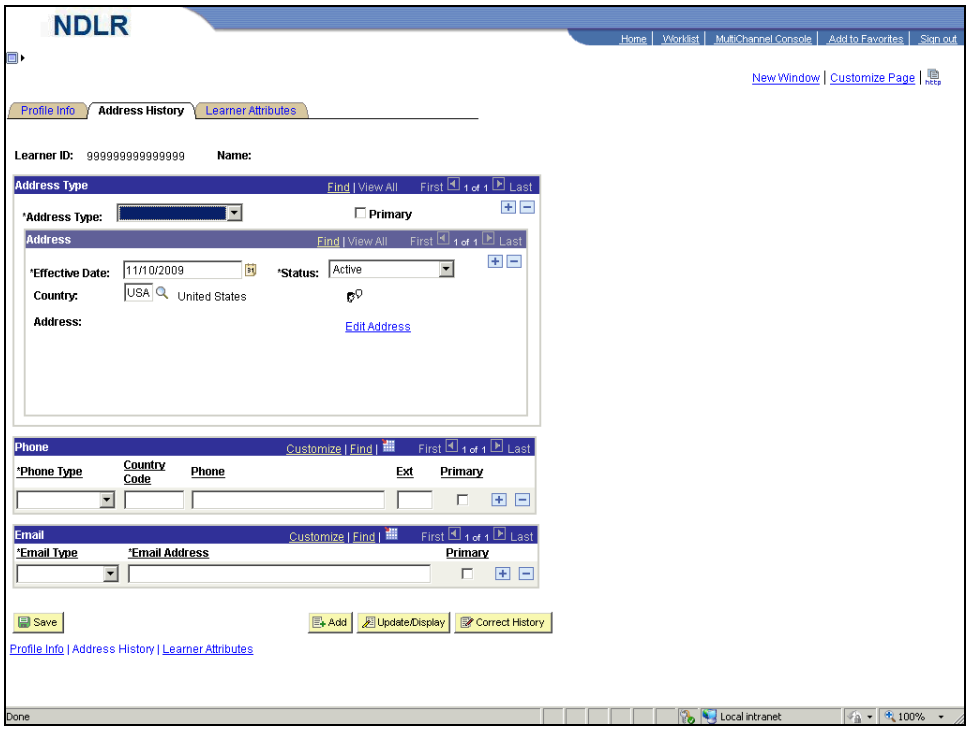
Step	Action
19.	Click the **Organization Lookup** button.



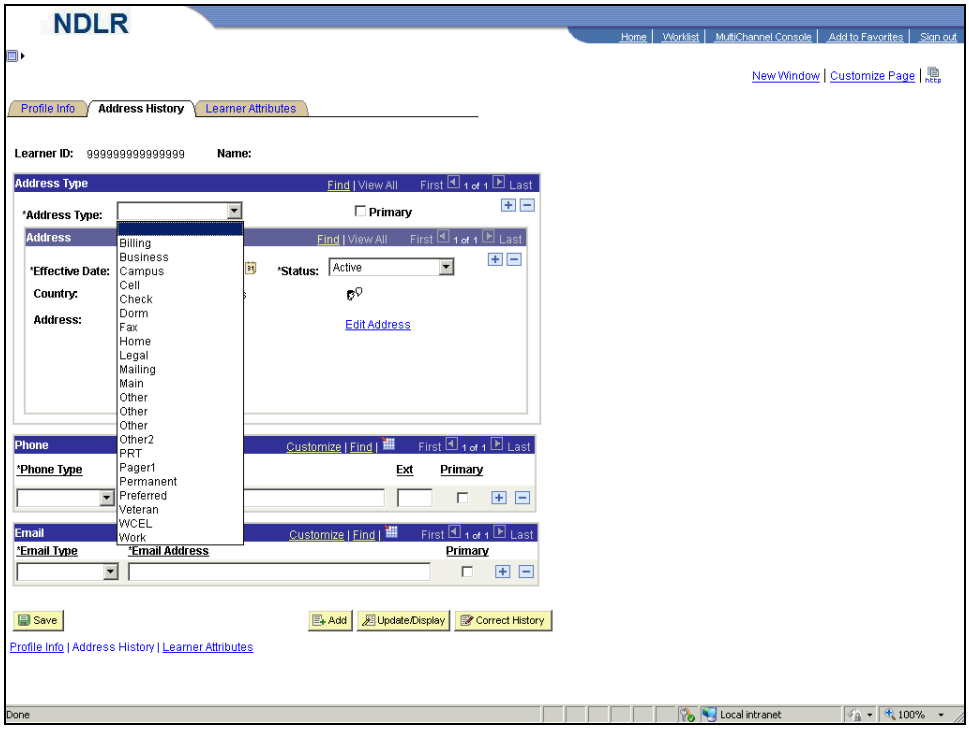
Step	Action
20.	Select the "**Customer 41**" list item.



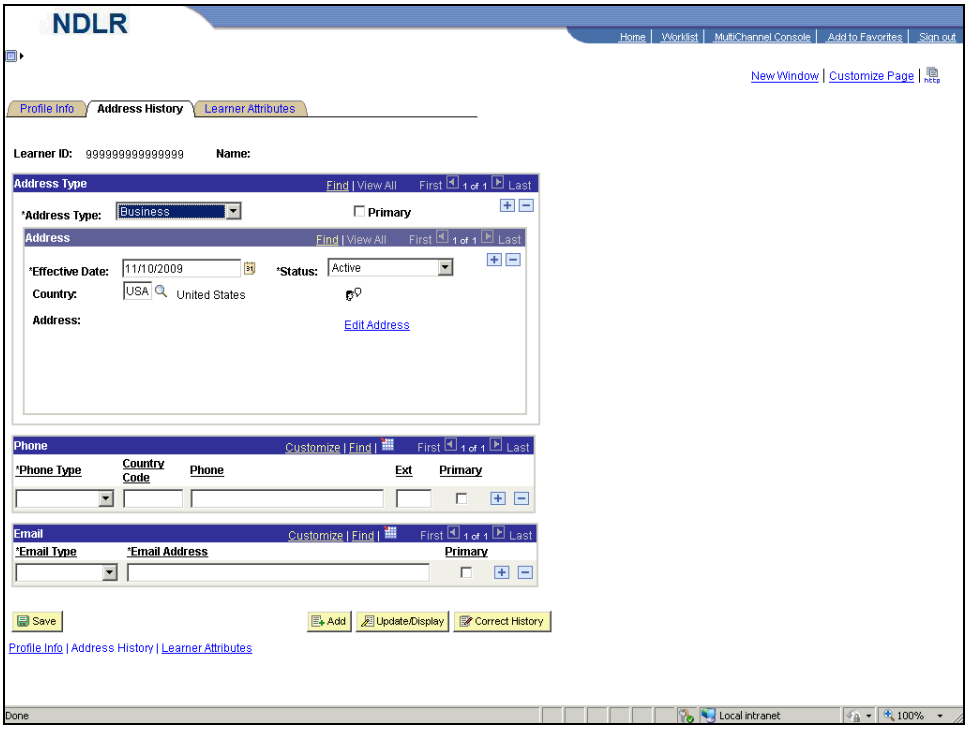
Step	Action
21.	Click in the **Job Title** field.
22.	Enter the desired information into the **Job Title** field. Enter "**Technical Consultant**".
23.	Click the **Learner Name** link. Learner Name
24.	The **Effective Date** should reflect the date in which the learner name information will become active in the system. For this example, retain the default value.
25.	Click in the **First Name** field.
26.	Enter the desired information into the **First Name** field. Enter "**Bruce**".
27.	Click in the **Last Name** field.
28.	Enter the desired information into the **Last Name** field. Enter "**Korte**".
29.	Click the **Address History** tab. Address History
30.	Use the **Address History** page to define the address information for the external learner. You can use the add a row button to add multiple addresses or to update addresses with a revised effective date.



Step	Action
31.	Click the **Address Type** drop-down list.

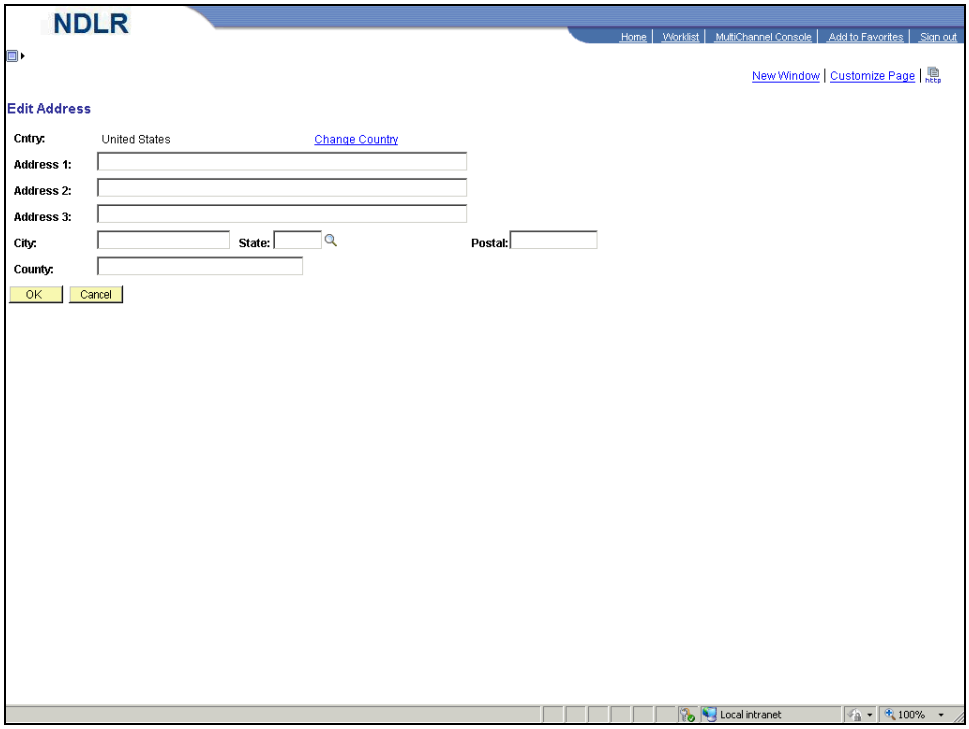


Step	Action
32.	Select the "**Business**" list item. Business
33.	The **Primary** option is required for one of the address types listed. **Note**: There can be several addresses identified for a business.



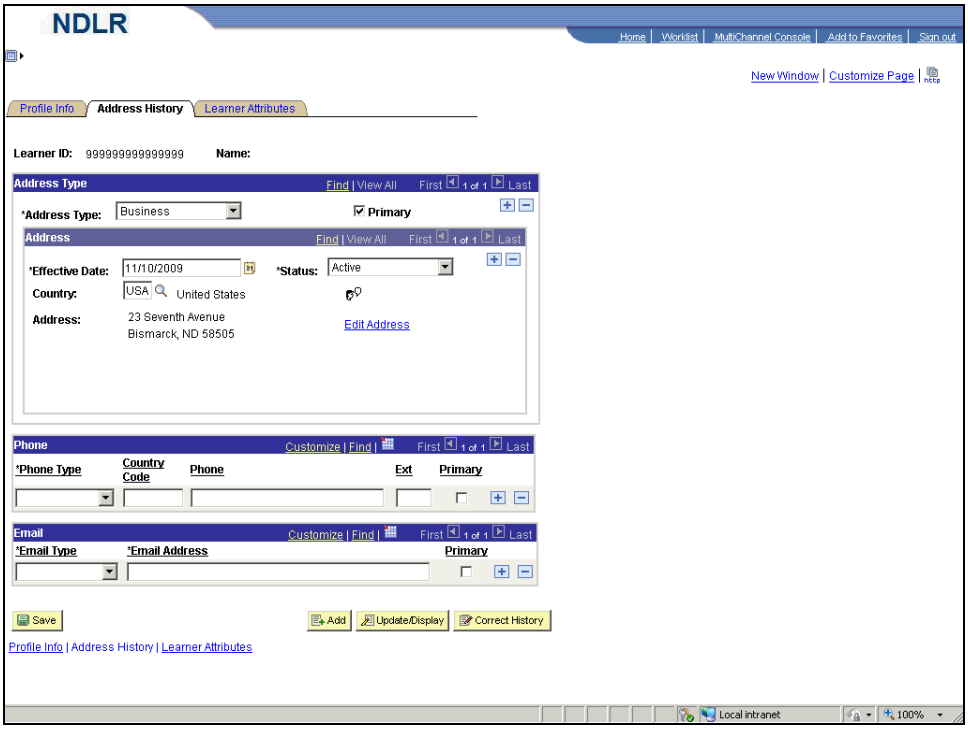
Step	Action
34.	Click the **Primary** option. ☐
35.	Use the **Effective Date** to define when the address type becomes valid. For example, if a company is in the process of moving, you can add the new address and future date the effective date to become active when the company completes the move.
36.	The **Status** field can be set to Active or Inactive. For this example, retain the default value.
37.	Click the **Edit Address** link. Edit Address

Step	Action
38.	Use the **Edit Address** page to define the address information for the external learner.

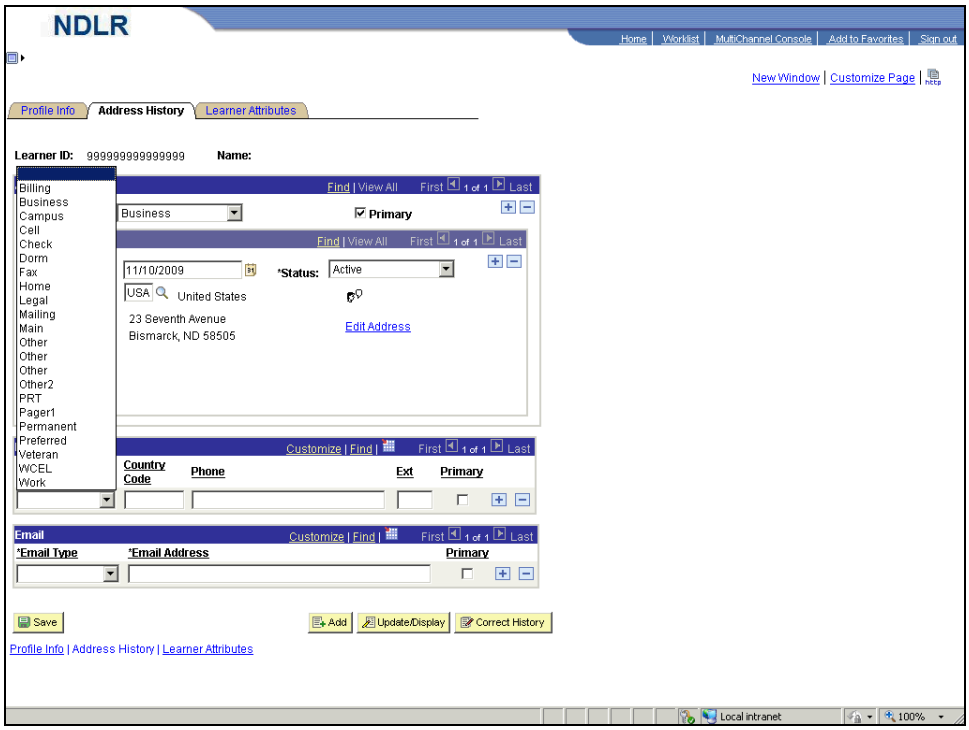


Step	Action
39.	Click in the **Address 1** field.
40.	Enter the desired information into the **Address 1** field. Enter "**23 Seventh Avenue**".
41.	Click in the **City** field.
42.	Enter the desired information into the **City** field. Enter "**Bismarck**".
43.	Click in the **State** field.
44.	Enter the desired information into the **State** field. Enter "**ND**".
45.	Click in the **Postal** field.

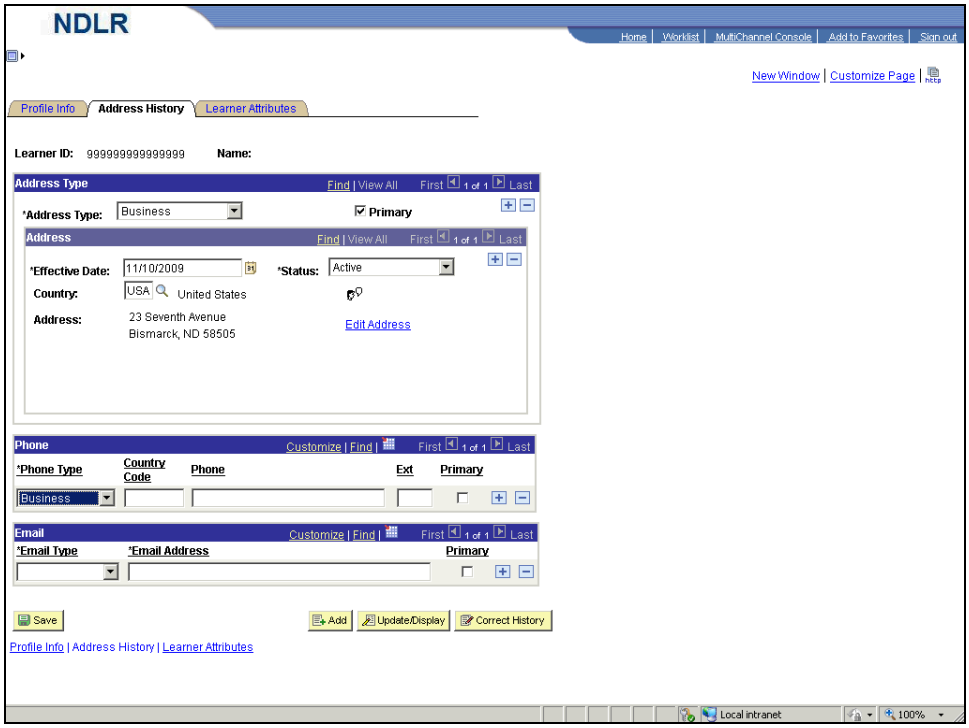
Step	Action
46.	Enter the desired information into the **Postal** field. Enter "**58505**".
47.	Click the **OK** button. OK



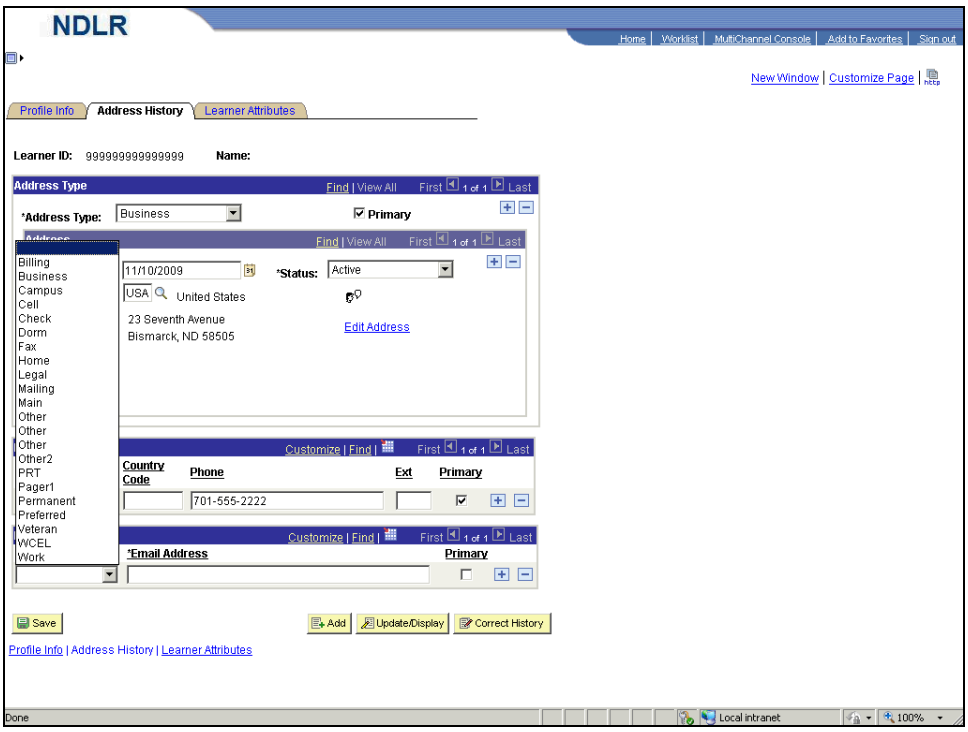
Step	Action
48.	Click the **Phone Type** drop-down list.



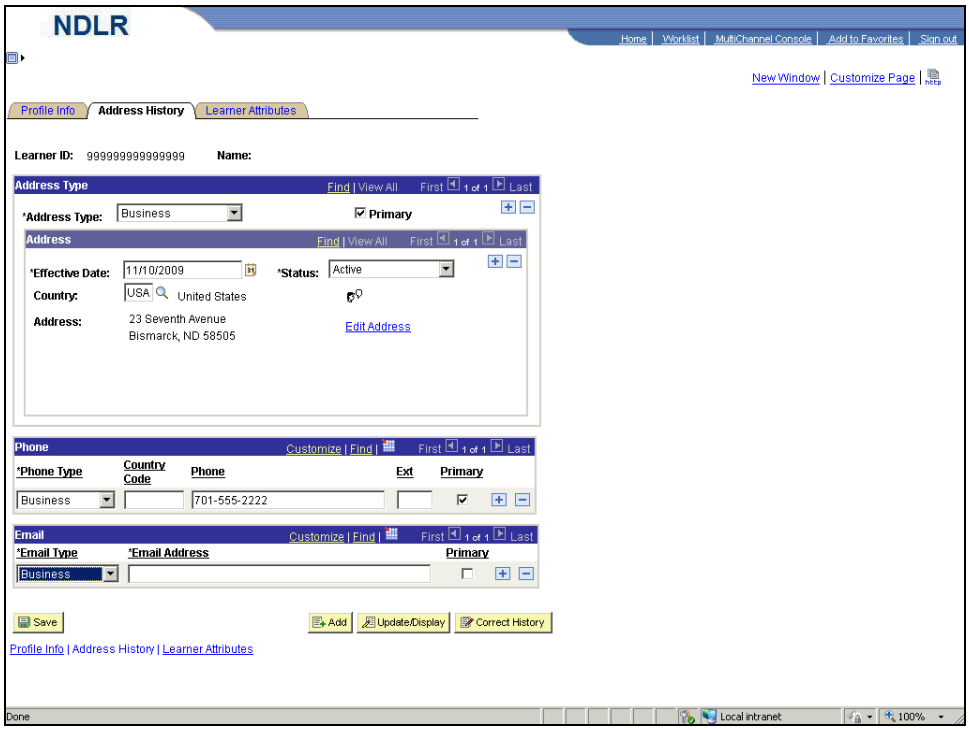
Step	Action
49.	Select the "**Business**" list item. Business



Step	Action
50.	Click in the **Phone** field.
51.	Enter the desired information into the **Phone** field. Enter "**701-555-2222**".
52.	Click the **Primary** option.
53.	Click the **Email Type** drop-down list.



Step	Action
54.	Select the "**Business**" list item.



Step	Action
55.	Click in the **Email Address** field.
56.	Enter the desired information into the **Email Address** field. Enter "**bkorte@nd.gov**".
57.	Click the **Primary** option.
58.	Click the **Save** button.
59.	**Congratulations**! You should now be able to: - Navigate to the **Profile Info** page. - Create external learner profiles. **End of Procedure.**

3.6 Creating Instructor Profiles

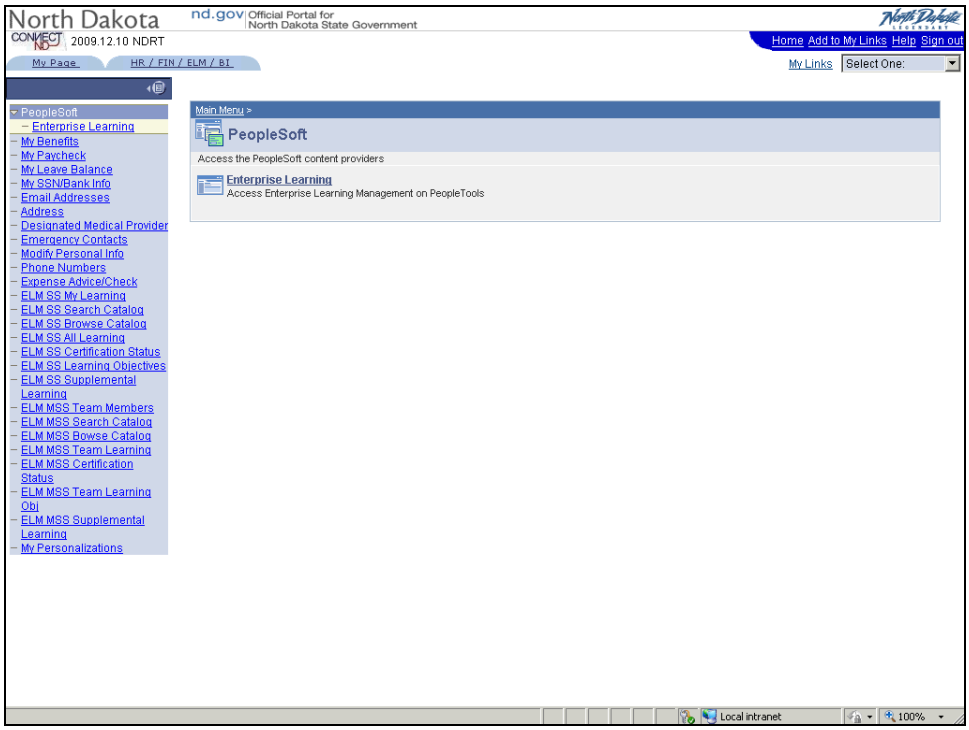
Each instructor must have a learner profile and an instructor profile. Before you can set up instructor information, you must first define the instructor as a learner in the system. You can do this through the Internal Learner or the External Learner components. Some of the information that you define for an instructor includes teaching location preferences, areas of expertise, primary language, cost and learning environment.

Procedure

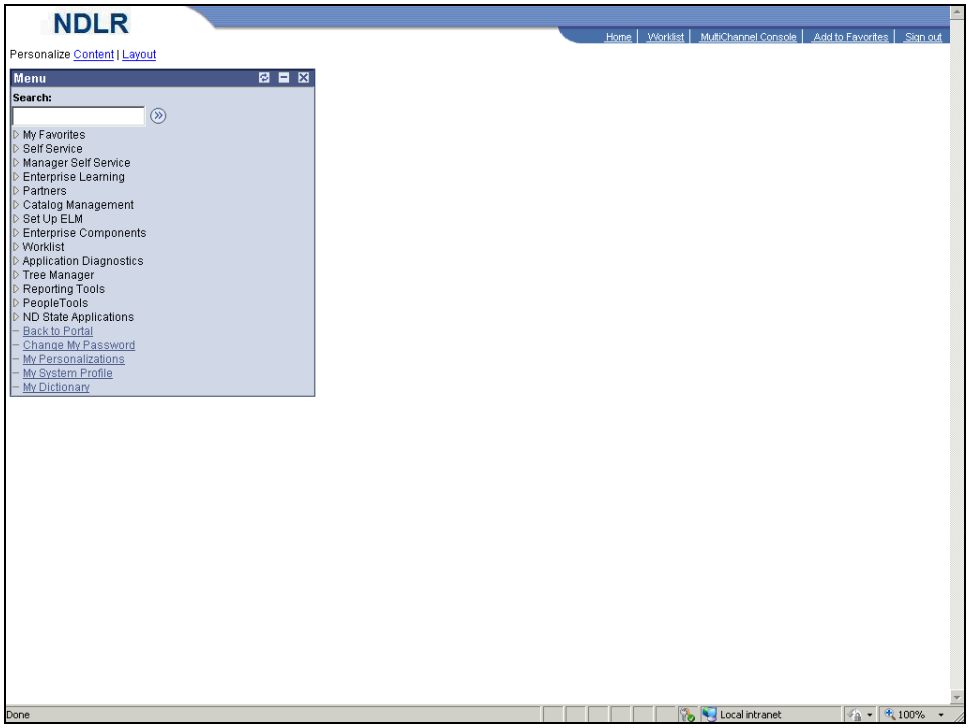
By the end of this topic, you will be able to:

- Navigate to the **Instructor** page.
- Add an instructor to the system.

Step	Action
1.	Begin by navigating to the **Instructors** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

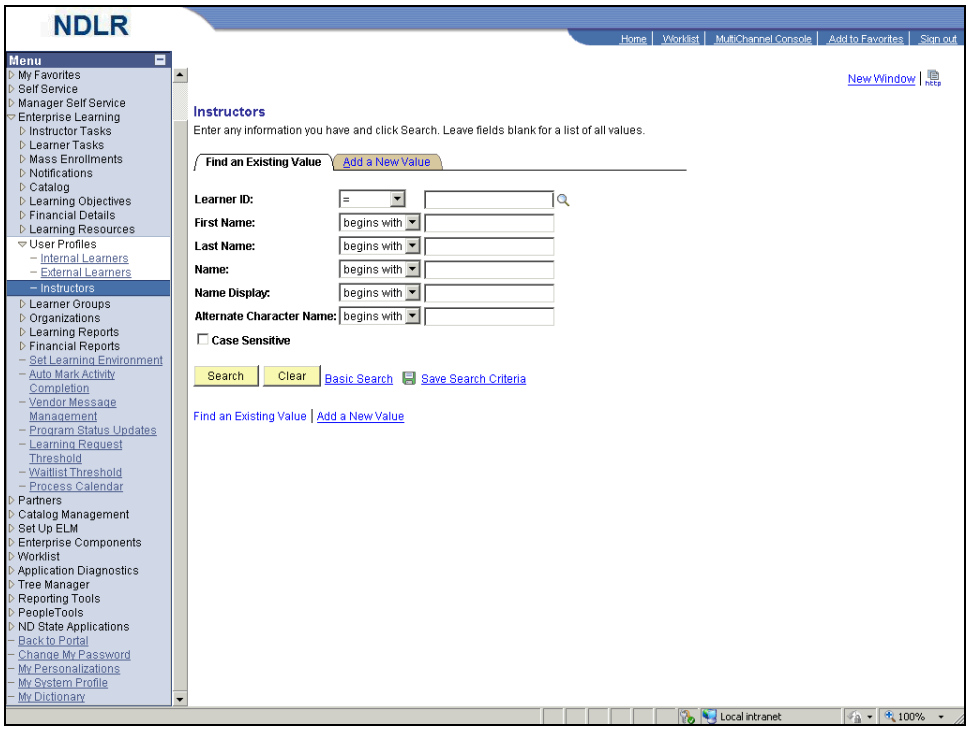


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning



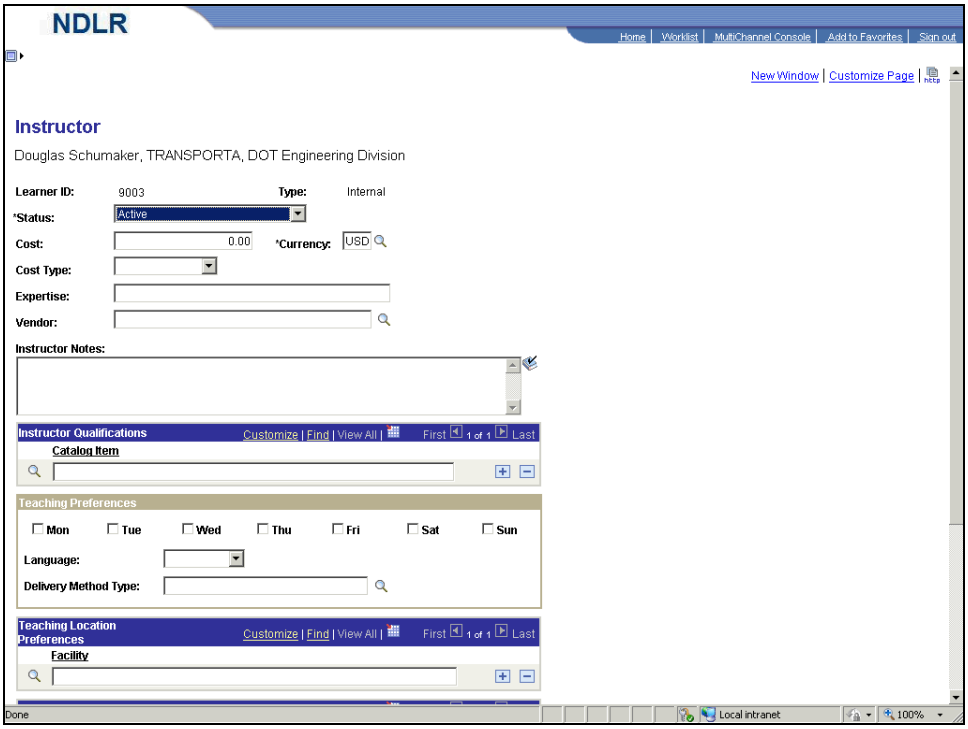
Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **User Profiles** link. ▷ User Profiles
6.	Click the **Instructors** link. – Instructors



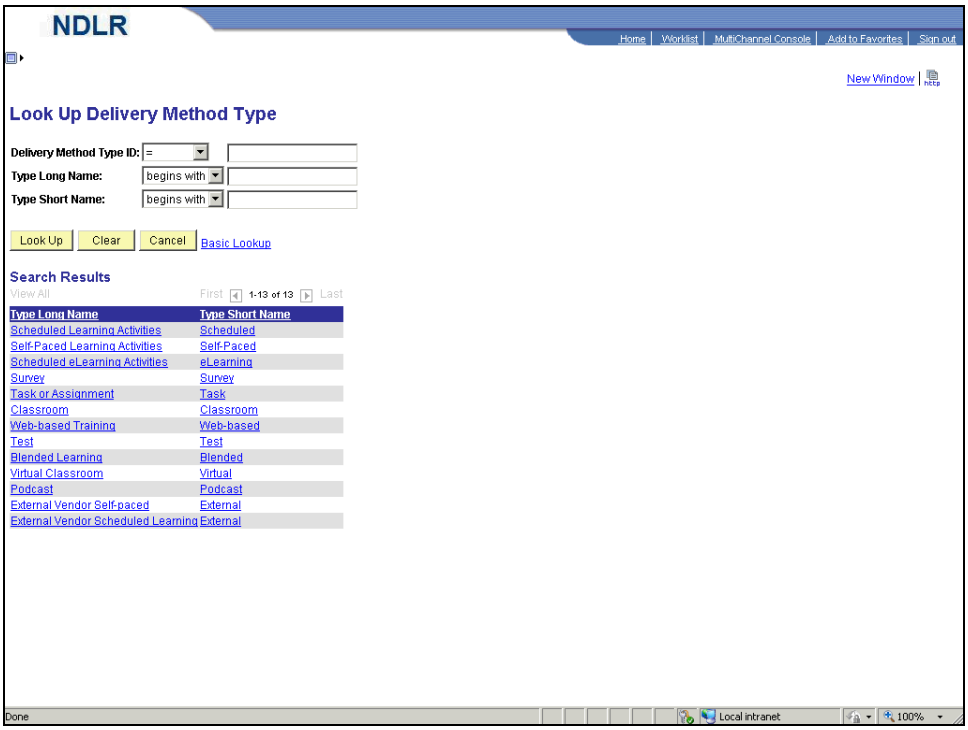
Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Add a New Value** tab. Add a New Value
9.	Click the **Learner ID Lookup** button. **Note**: This must be the Learner ID of the Internal or External Learner whom you want to add as an Instructor.
10.	Click in the **Last Name** field.
11.	Enter the desired information into the **Last Name** field. Enter "**Schumaker**".
12.	Click the **Look Up** button. Look Up
13.	Select the "**DOUGLAS SCHUMAKER**" list item.
14.	Click the **Add** button. Add

Step	Action
15.	The **Instructor** page is used to define instructor information including teaching location preferences, areas of expertise, primary language, cost and learning environment.
16.	The **Status** of an instructor can be Active or Inactive. For this example, retain the default value.
17.	The **Currency** field indicates the currency type that the instructor will be paid.
18.	The **Cost Type** is the increment the cost will be calculated when the instructor is used.

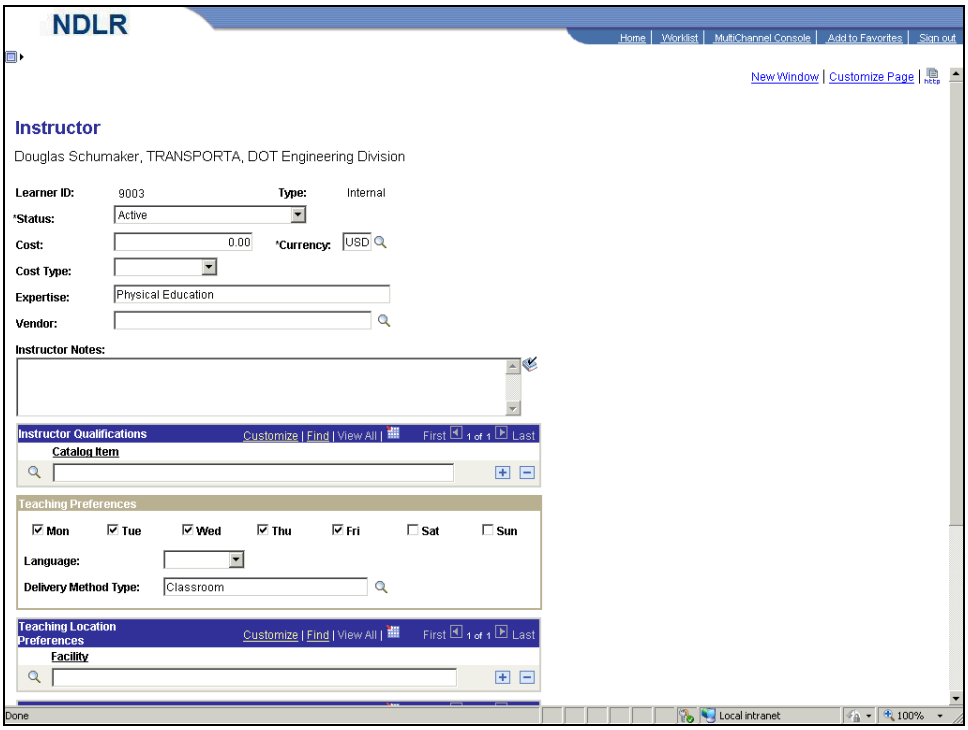


Step	Action
19.	Click in the **Expertise** field.
20.	Enter the desired information into the **Expertise** field. Enter "**Physical Education**".
21.	Use the **Instructor Notes** box to enter notes or comments about the instructor.
22.	There is a spell check icon that can be used to check for misspelled words within the **Instructor Notes** box.

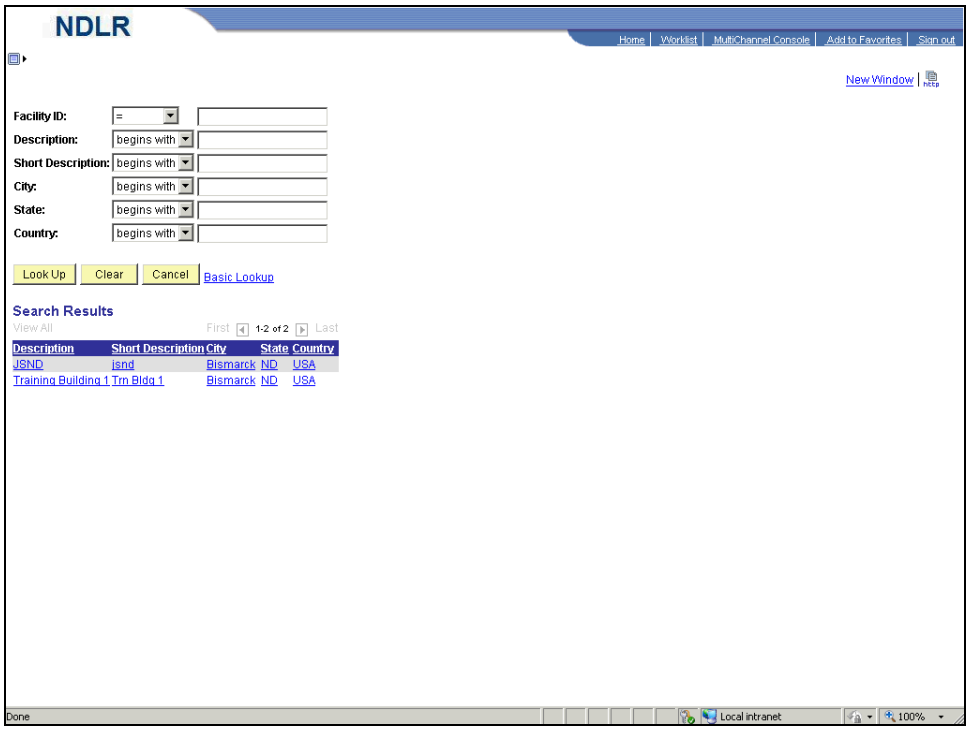
Step	Action
23.	When you assign an instructor to an activity, a search feature enables you to search for instructors by name, vendor, language and qualifications. If you search on qualifications, the system will look for instructors whose profile includes the catalog item for the activity that you are defining.
24.	The **Instructor Qualifications** section is used for general information only. For this example, leave this section blank.
25.	Use the **Teaching Preferences** section to define the instructor availability, language and preferred delivery method.
26.	Click the **Mon** option.
27.	Click the **Tue** option.
28.	Click the **Wed** option.
29.	Click the **Thu** option.
30.	Click the **Fri** option.
31.	Click the **Delivery Method Type Lookup** button.



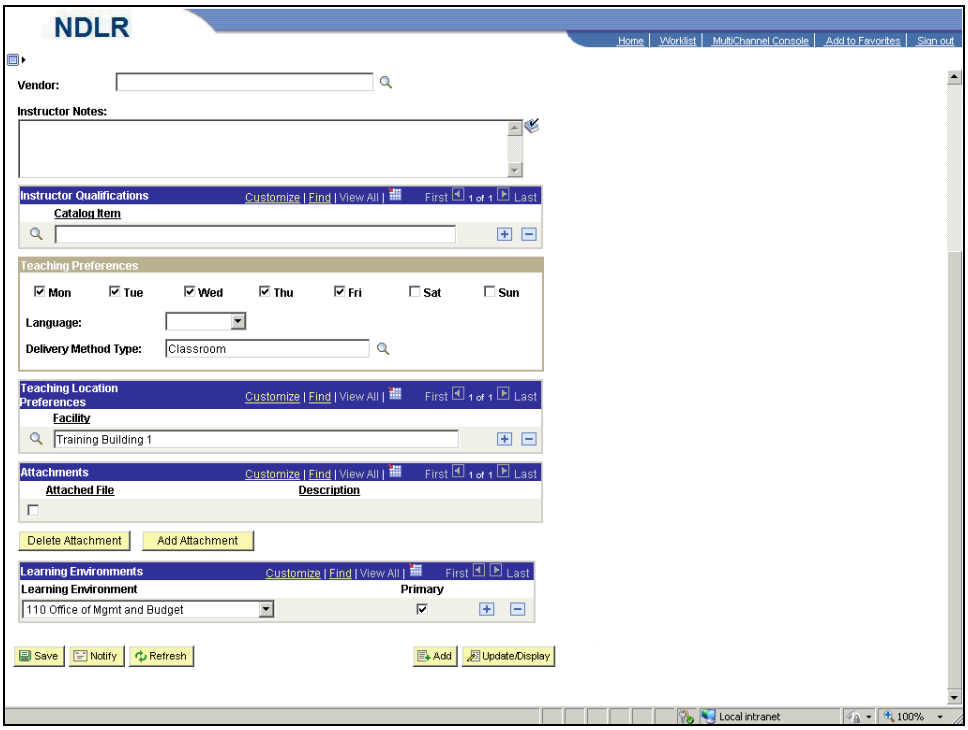
Step	Action
32.	Select the "**Classroom**" list item.



Step	Action
33.	Click the scrollbar.
34.	Click the **Find Facility Lookup** button.



Step	Action
35.	Select the "**Training Building 1**" list item.



Step	Action
36.	Click the **Save** button. Save
37.	**Congratulations**! You should now be able to: - Navigate to the **Instructor** page. - Add an instructor to the system. **End of Procedure.**

Lesson 4: Managing Payment Methods

4.1 Enabling Chargebacks for Customers

Enterprise Learning Management supports several payment methods that you can select when you enroll or register learners in learning activities and programs that carry a charge. Each chargeback is a specific combination of one or more ChartField values and a department. This combination enables the appropriate accounts and departments to be charged and credited for enrollment, registration and drop fees. In **Enterprise Learning Management**, you select default ChartField values for each general ledger business unit. Each general ledger business unit is mapped to a PeopleSoft Human Resources Management Solutions (HRMS) business unit. This mapping schema is created and maintained in PeopleSoft HRMS and is imported into **Enterprise Learning Management**.

To enable external learners to charge back enrollment fees:

- Select chargebacks as an authorized payment method for the learner's customer organization.
- Select the general ledger business unit to associate with the customer organization.
- Specify whether to display ChartFields to external learners during enrollment.
- Select the default ChartField values to associate with enrollment fees.
- Enter a discount percentage, if applicable.

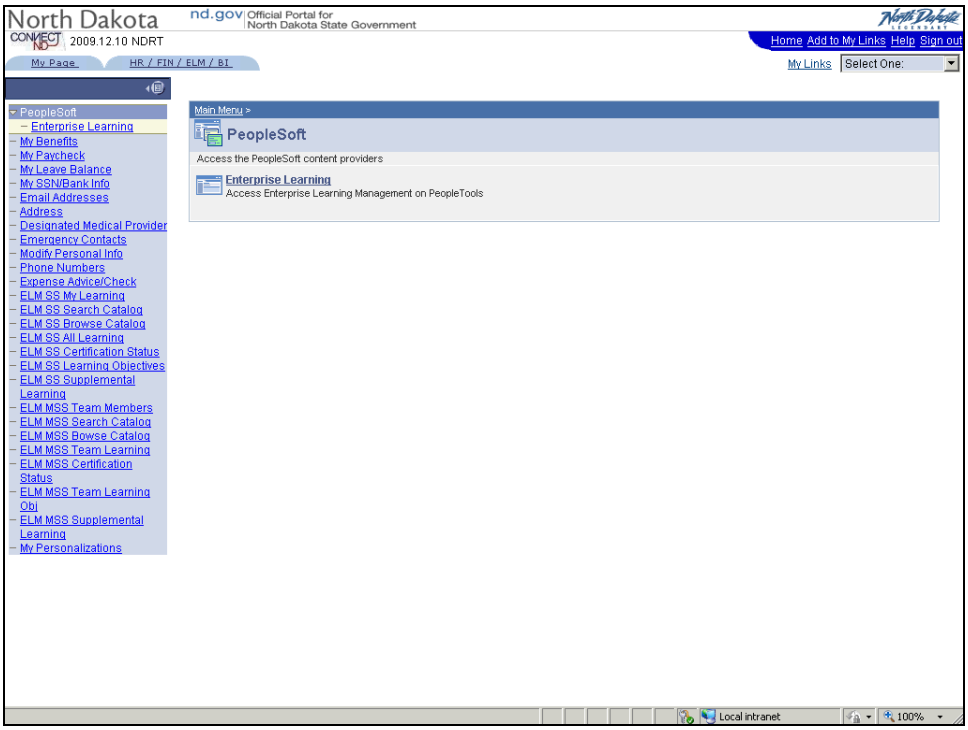
Procedure

By the end of this topic, you will be able to:

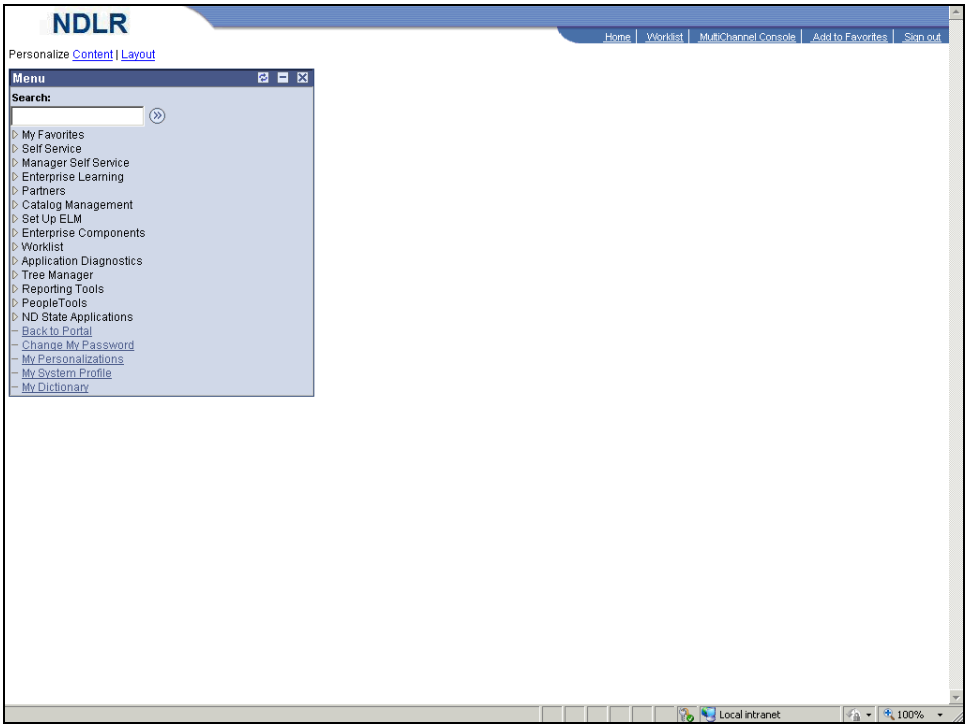
- Navigate to the **Define Customers** page.
- Enable Chargebacks for Customers.

Note: Chargebacks for Internal Learners will be processed automatically by the system. The State of North Dakota will not be using the chargeback functionality for External Learners.

Step	Action
1.	Begin by navigating to the **Define Customers** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

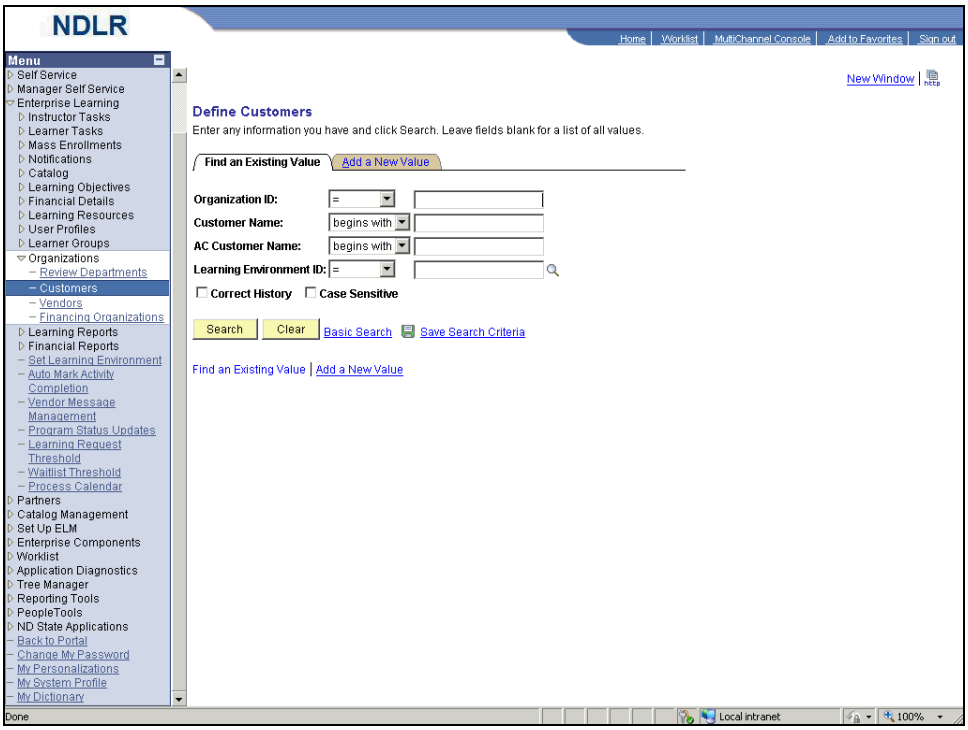


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

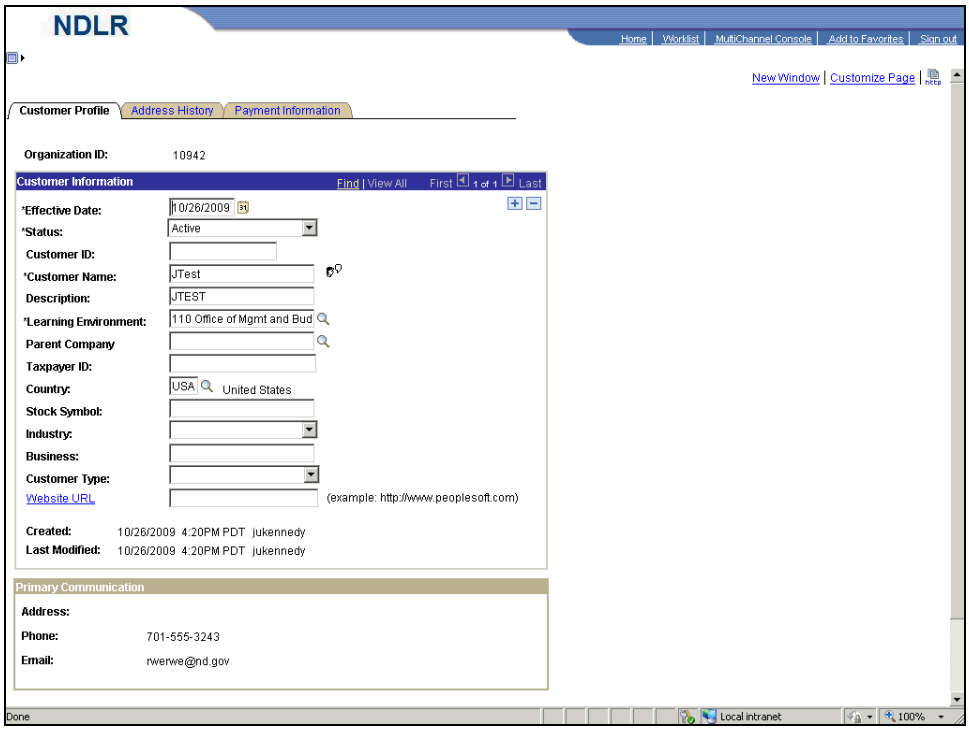


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

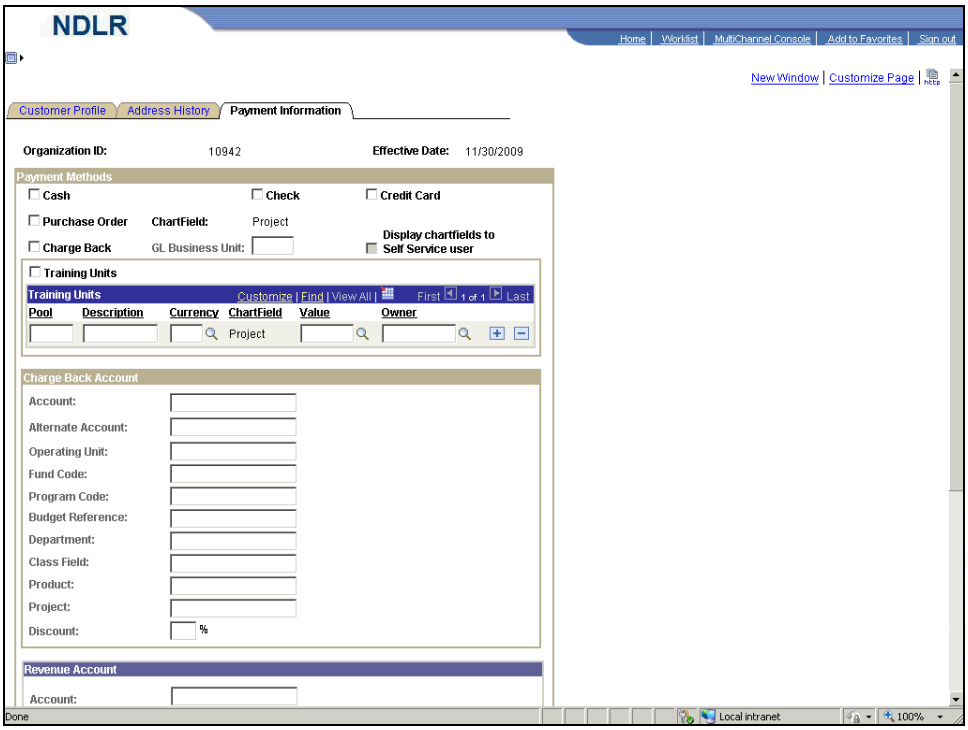
Step	Action
5.	Click the **Organizations** link. ▷ Organizations
6.	Click the **Customers** link. – Customers



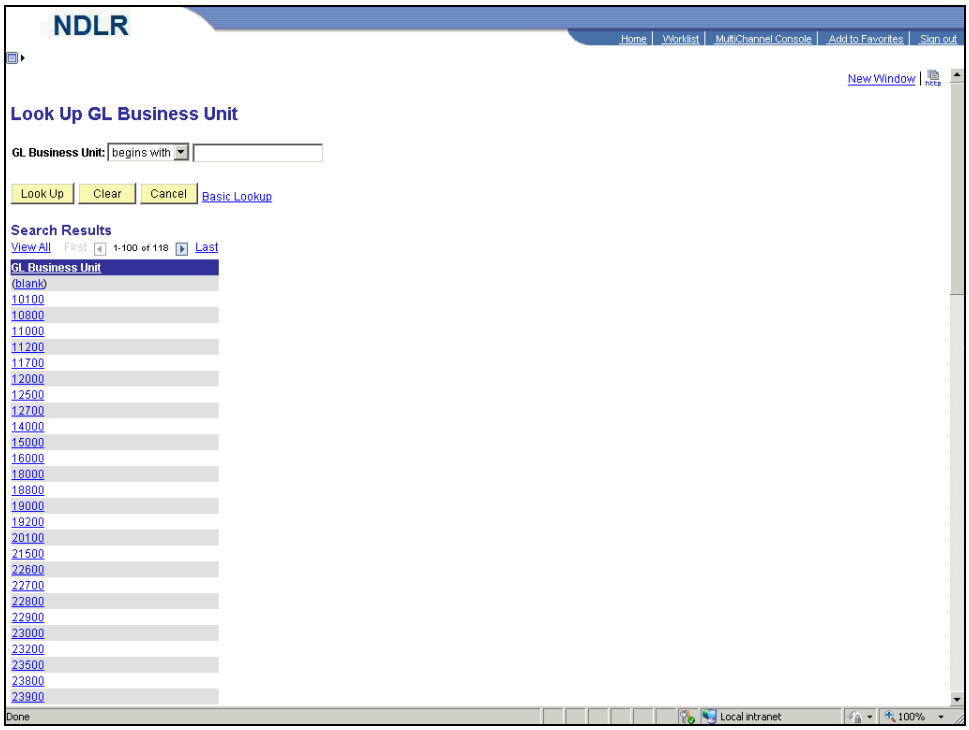
Step	Action
7.	Click the **Collapse Menu** button.
8.	Click in the **Organization ID** field.
9.	Enter the desired information into the **Organization ID** field. Enter "**10942**".
10.	Click the **Search** button. Search
11.	Use the **Customer Profile** page to enter the customer's name, assign a customer a learning environment and enter other basic information, such as the taxpayer ID or industry.
12.	Customer information is effective dated. To update this information, insert a new row with a new effective date.



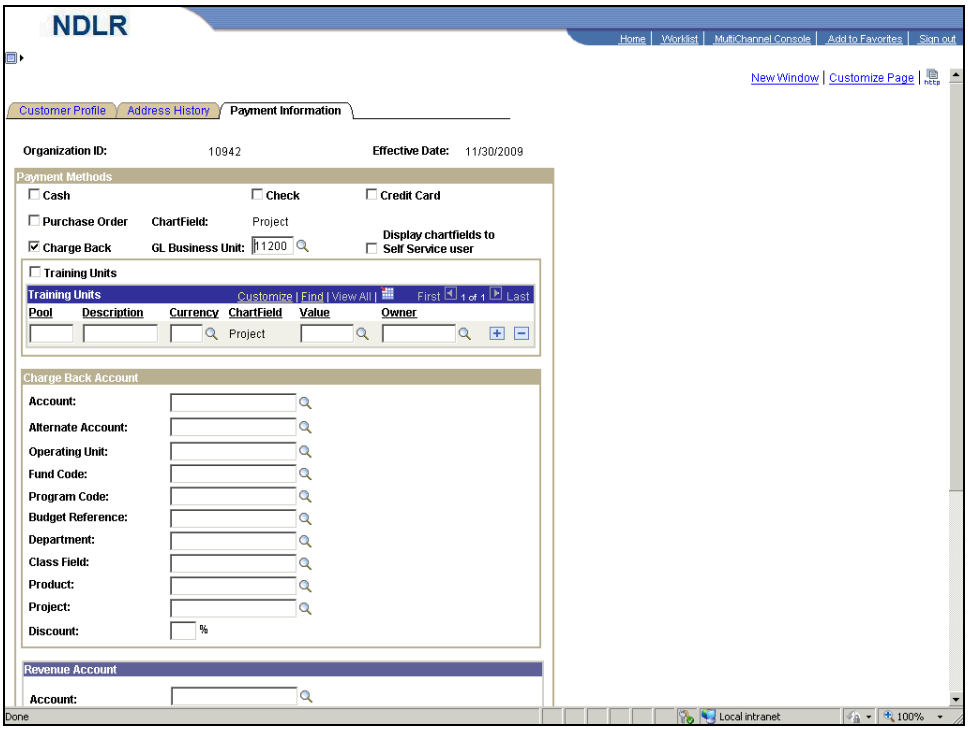
Step	Action
13.	Click the **Add a new row** button.
14.	The **Effective Date** field defaults to the system date for the new row of data. For this example, retain the default date.
15.	Click the **Payment Information** tab. Payment Information
16.	Use the **Payment Information** page to define the default payment methods for learning environments. These methods can be overridden at the learning environment and customer levels.
17.	Use the **Payment Methods** section to define a payment method for a customer. All forms of payment are available to external learners. A charge back is the only payment method that applies to internal learners.



Step	Action
18.	Click the **Charge Back** option.
19.	Notice the **GL Business Unit** field is now enabled.
20.	Click the **GL Business Unit Look Up** button.



Step	Action
21.	Select the "**11200**" list item. 11200
22.	The **GL Business Unit** field identifies where a charge back is assigned. The customer organization inherits ChartField values for chargeback and revenue accounts from the GL Business Unit. This field is required if you select the Purchase Order, Charge Back or Training Units option.
23.	The system populates the **Charge Back Account** and **Revenue Account** sections with the ChartField values assigned to the selected general ledger business unit during system implementation.
24.	The **Discount** field identifies the percentage discount to apply to enrollment fees for this customer. Discounts are applied only to charged back enrollment fees. This is an optional field that can be used for permanent or promotional temporary discounts.



Step	Action
25.	Click in the **Discount** field.
26.	Enter the desired information into the **Discount** field. Enter "**10**".
27.	Click the **navigation** bar.
28.	Click the **Save** button.
29.	**Congratulations**! You should now be able to: - Navigate to the **Define Customers** page. - Enable Chargebacks for Customers. **End of Procedure.**

4.2 Setting Up a Training Unit Pool

Training Units are prepaid units that external organizations can purchase at a discounted price. Training Units enable training organizations to presell training that learners can purchase at a later date. They enable customer organizations to receive a predetermined discount rate on their training. The system depletes training units from the prepaid account each time a learner from the customer organization uses the account to pay for enrollment, registration or drop fees. this prepaid account is referred to as a training unit pool.

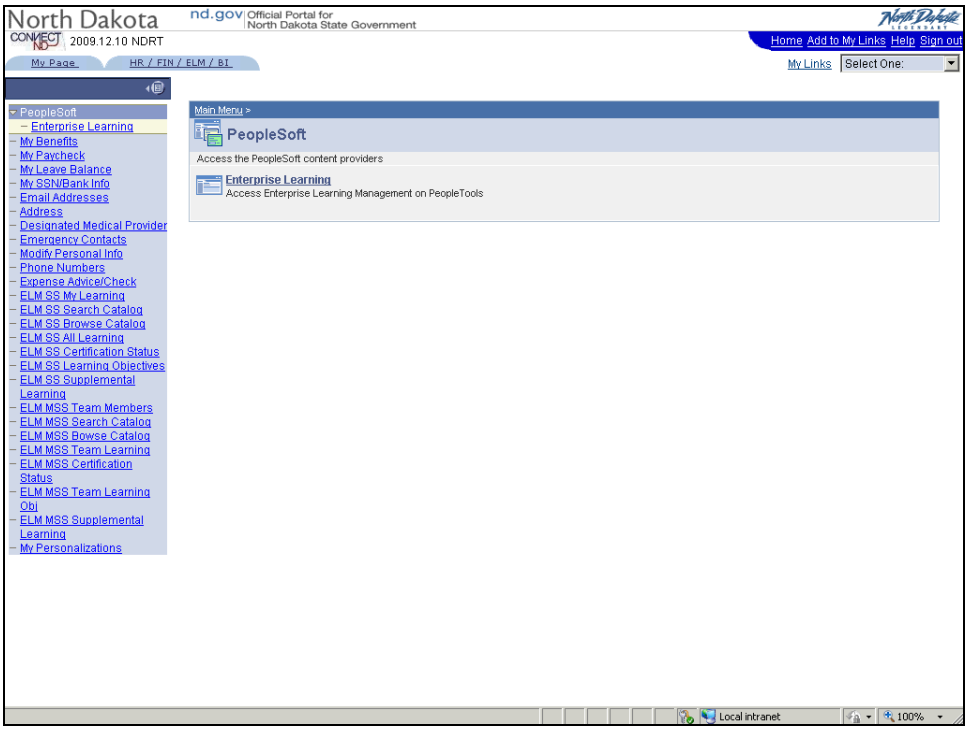
PeopleSoft Financials handle the actual purchase and accounting of training units for a training unit pool. PeopleSoft Enterprise Learning Management handles the tracking and maintenance of training unit pools after the customer organization purchases them. Each customer organization can have multiple training unit pools. You can associate each learner from the customer organization with one or more training unit pools. This allows learners to use the training unit pools to pay for enrollment, registration and drop fees.

Procedure

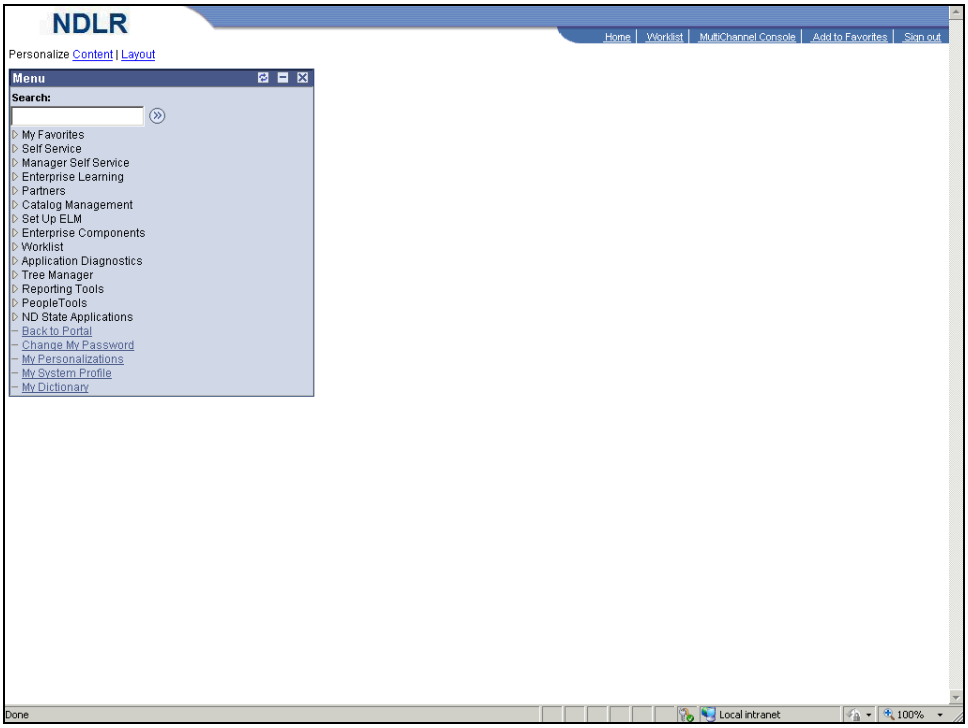
By the end of this topic, you will be able to:

- Navigate to the **Define Customers** page.
- Set up a Training Unit Pool.

Step	Action
1.	Begin by navigating to the **Define Customers** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

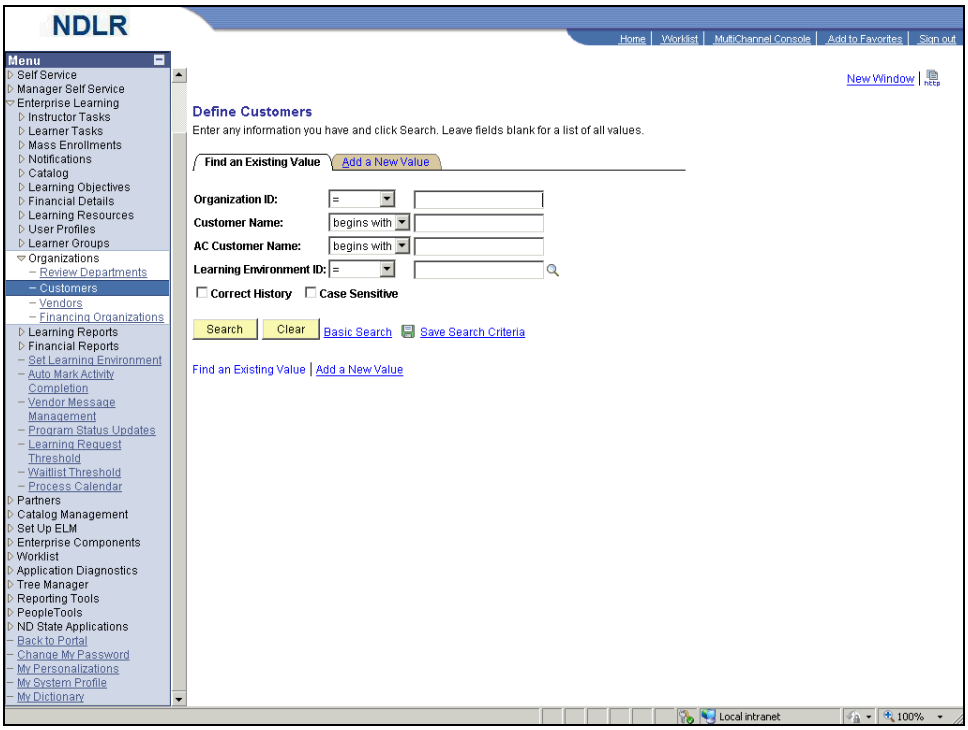


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

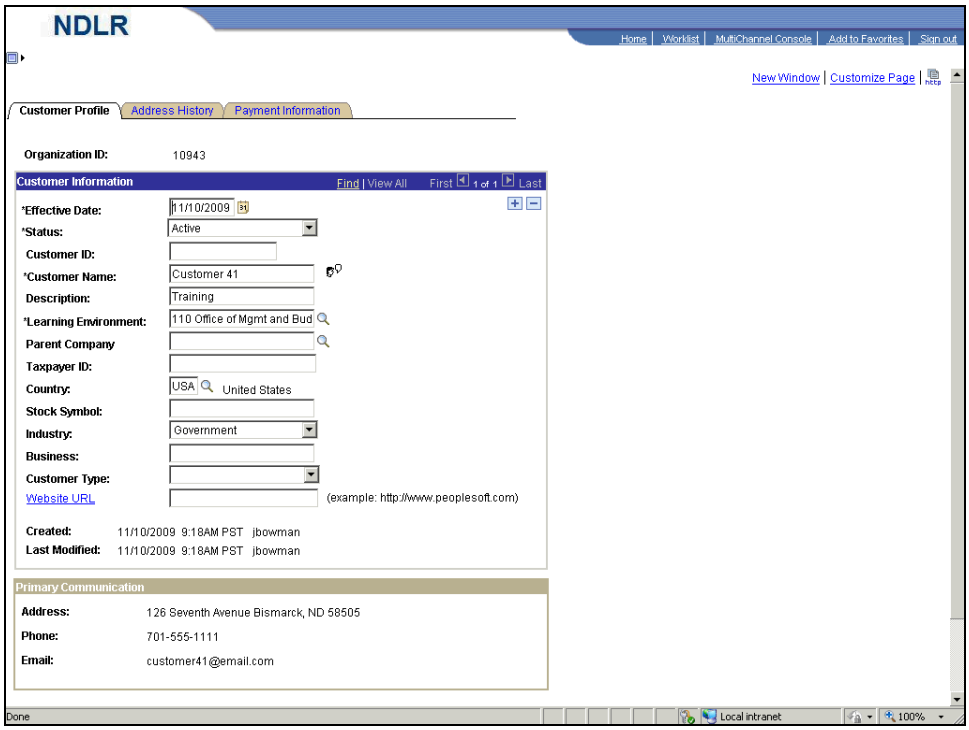


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

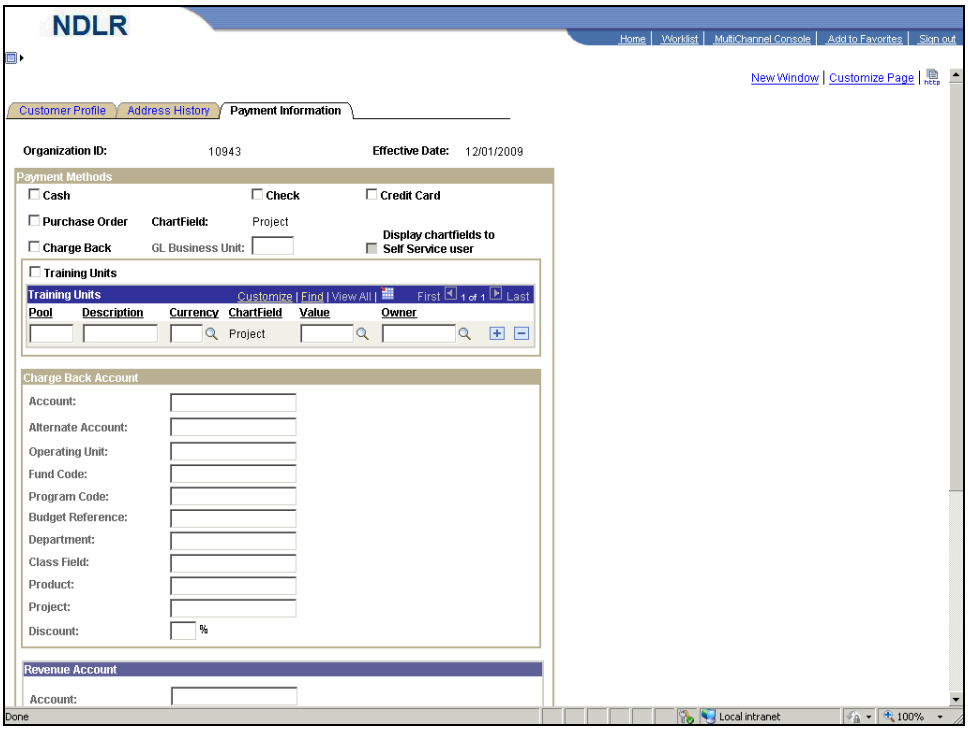
Step	Action
5.	Click the **Organizations** link. ▷ Organizations
6.	Click the **Customers** link. Customers



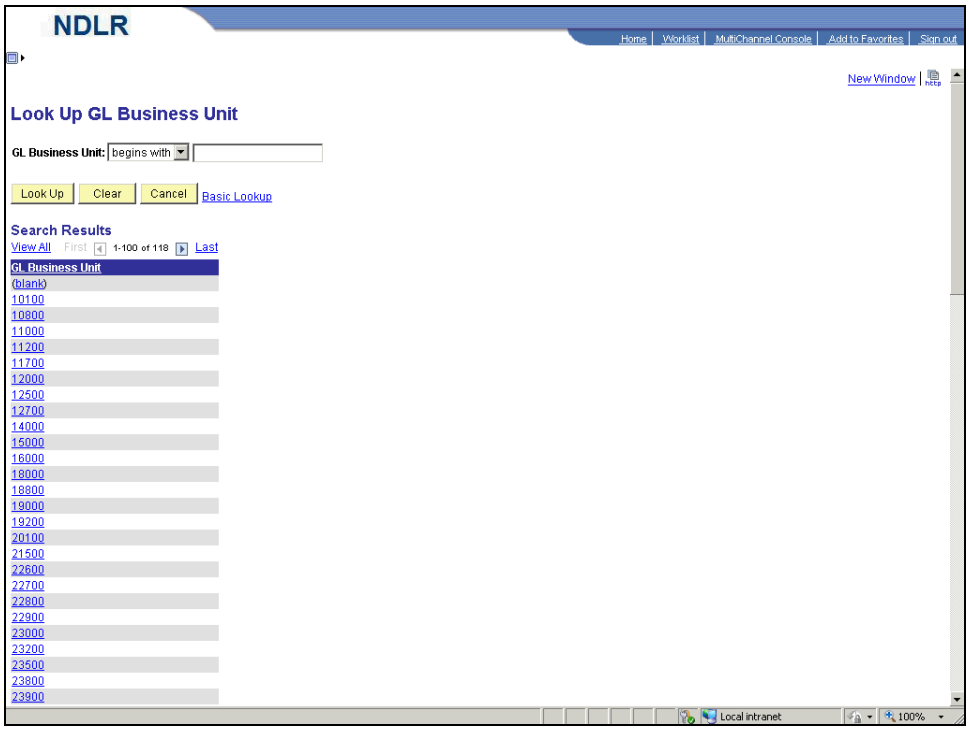
Step	Action
7.	Click the **Collapse (Ctrl+Y) Menu** button.
8.	Click the **Search** button. Search
9.	Click the **10943** link. 10943



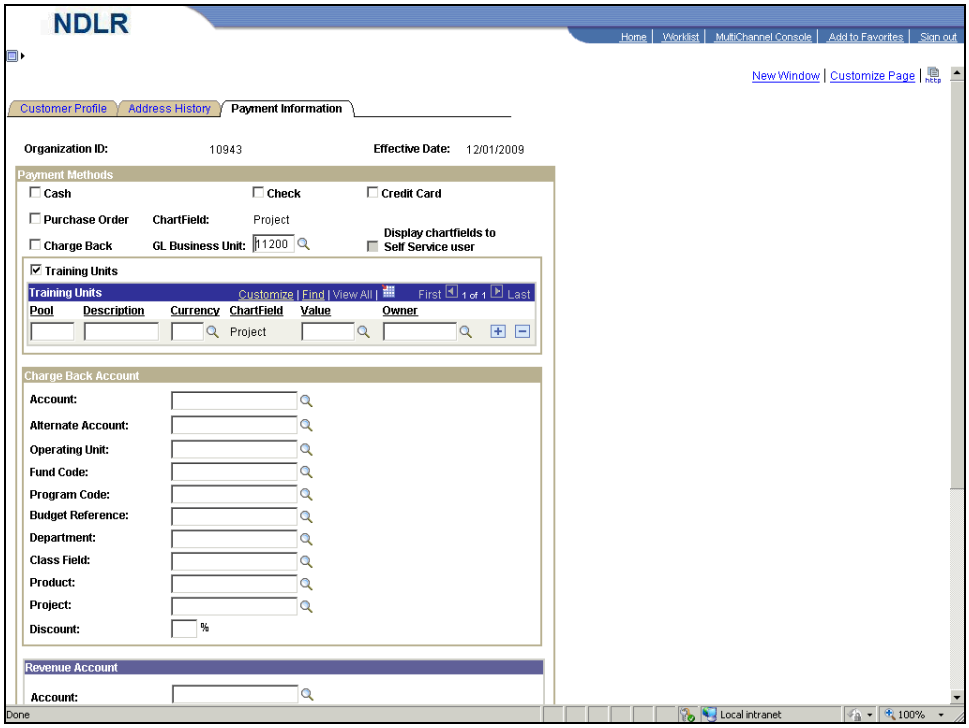
Step	Action
10.	Click the **Add a new row at row 1 (Alt+7)** button.
11.	Click the **Payment Information** tab. Payment Information



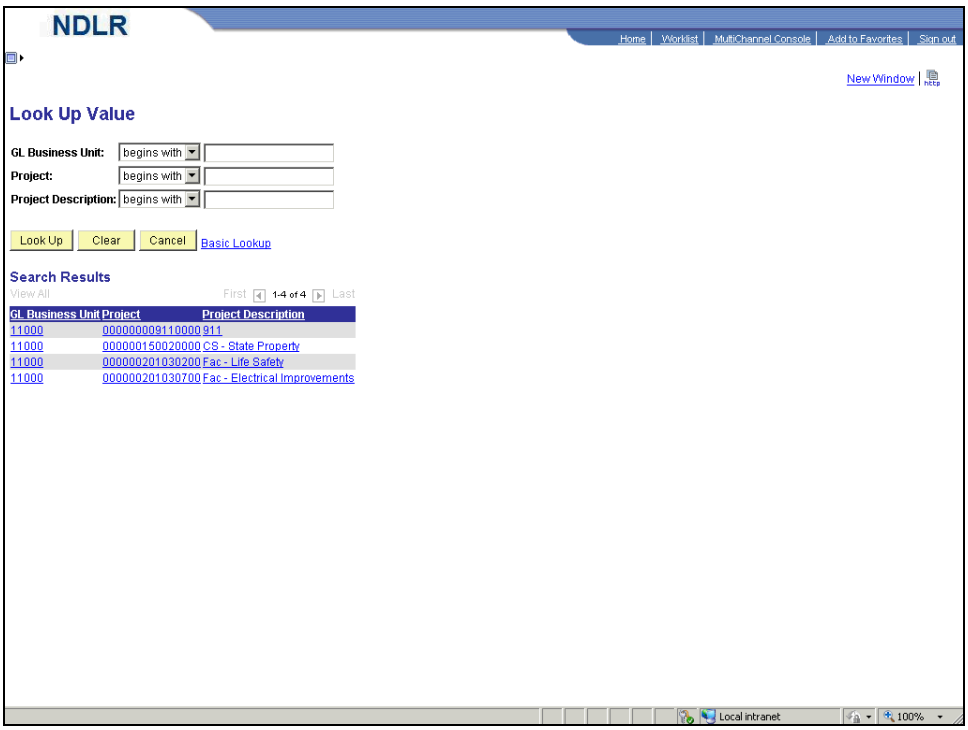
Step	Action
12.	Click the **Training Units** option. ☐ Training Units
13.	Click the **Look up GL Business Unit (Alt+5)** button. 🔍



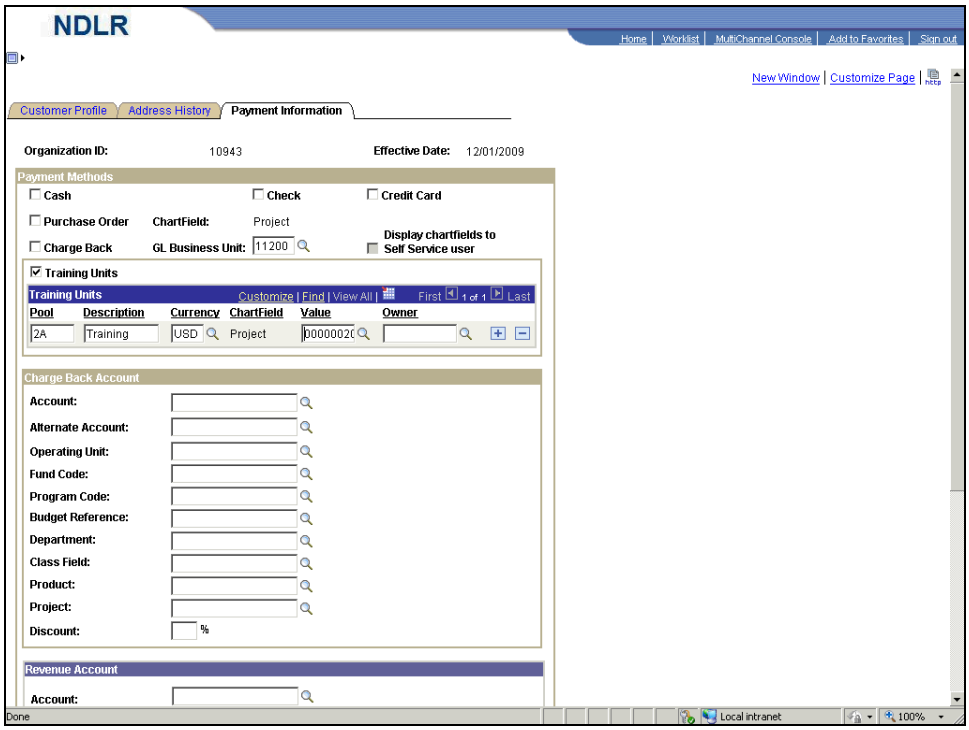
Step	Action
14.	Click the **11200** link. 11200



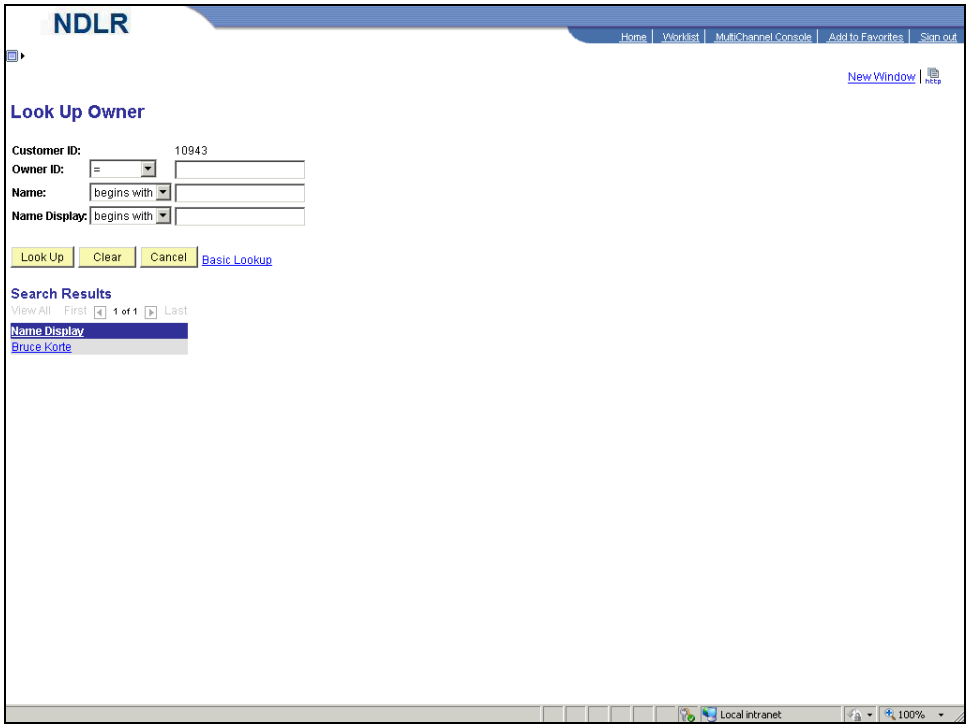
Step	Action
15.	Click in the **Pool** field.
16.	Enter the desired information into the **Pool** field. Enter "**2A**".
17.	Click in the **Description** field.
18.	Enter the desired information into the **Description** field. Enter "**Training**".
19.	Click in the **Currency** field.
20.	Enter the desired information into the **Currency** field. Enter "**USD**".
21.	Click the **Look up Value (Alt+5)** button.



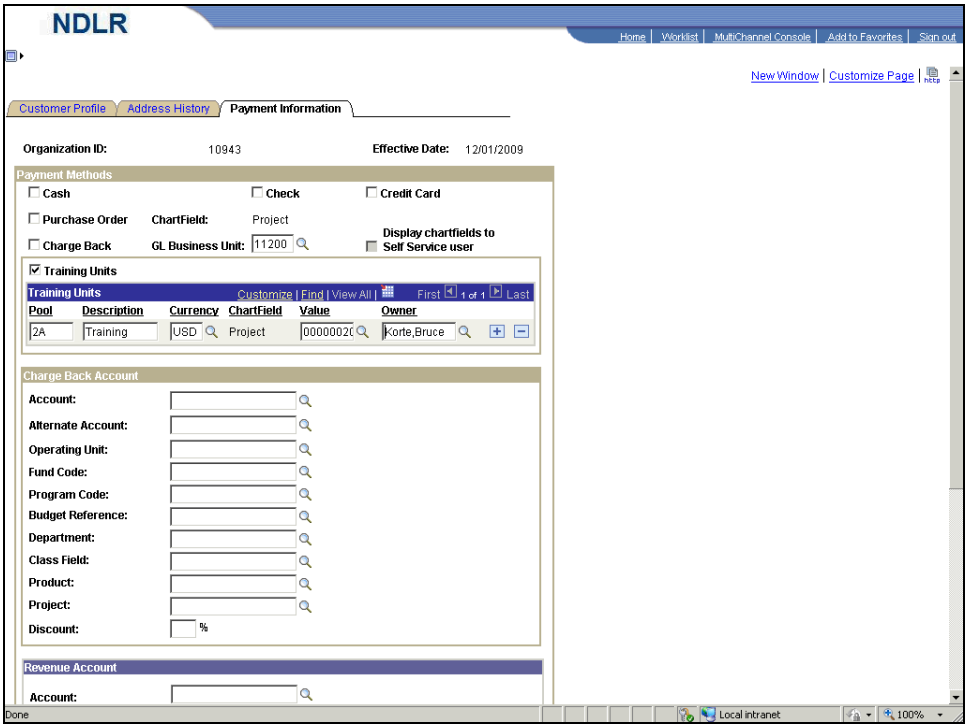
Step	Action
22.	Click the **Fac - Life Safety** link.



Step	Action
23.	Click the **Look up Owner (Alt+5)** button.



Step	Action
24.	Click the **Bruce Korte** link. Bruce Korte



Step	Action
25.	Click the scrollbar.
26.	Click the **Save** button. Save
27.	**Congratulations**! You should now be able to: - Navigate to the **Define Customers** page. - Set up a Training Unit Pool. **End of Procedure.**

4.3 Adding Training Units to a Training Unit Pool

Customer organizations can purchase training units for a training unit pool as often as necessary to replenish the pool. Each time the customer organization purchases training units you must add a new row to the training unit pool. The system deducts training units on a first in first out basis. When a learner uses training units to enroll in an activity or register for a program, the system deducts training units from the first row in the training unit pool. After the system deducts training units from a row, you cannot edit or delete the row, even when the learner drops the

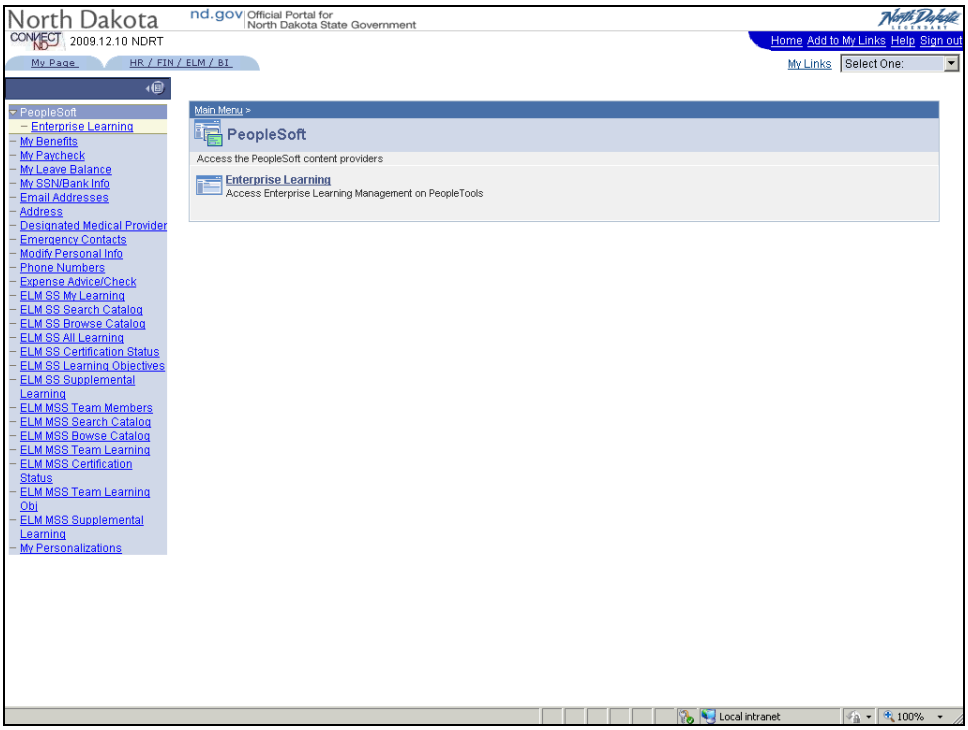
activity or program and the balance for the row returns to the full amount. Create new rows to add more units to the training unit pool.

Procedure

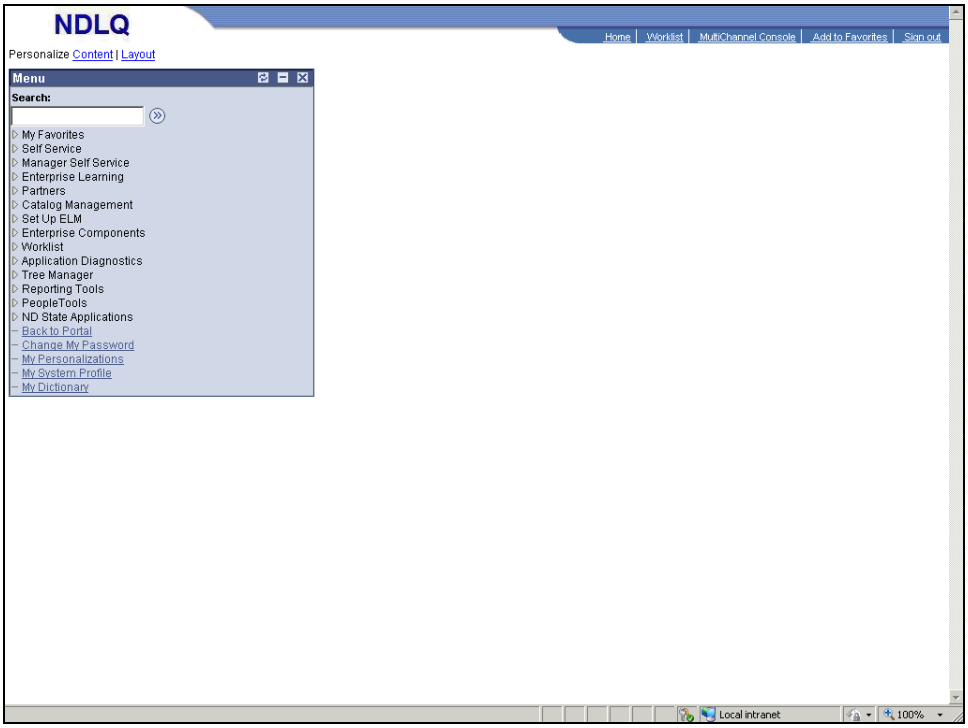
By the end of this topic, you should be able to:

- Navigate to the **Maintain Training Units** page.
- Add training units to a training unit pool.

Step	Action
1.	Begin by navigating to the **Maintain Training Units** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

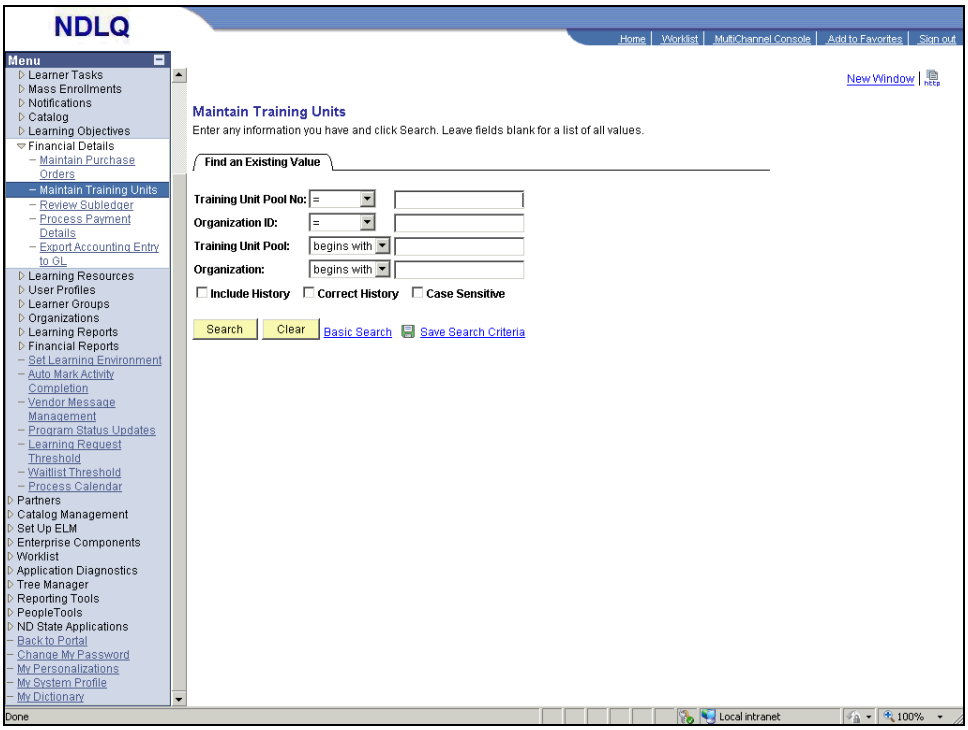


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

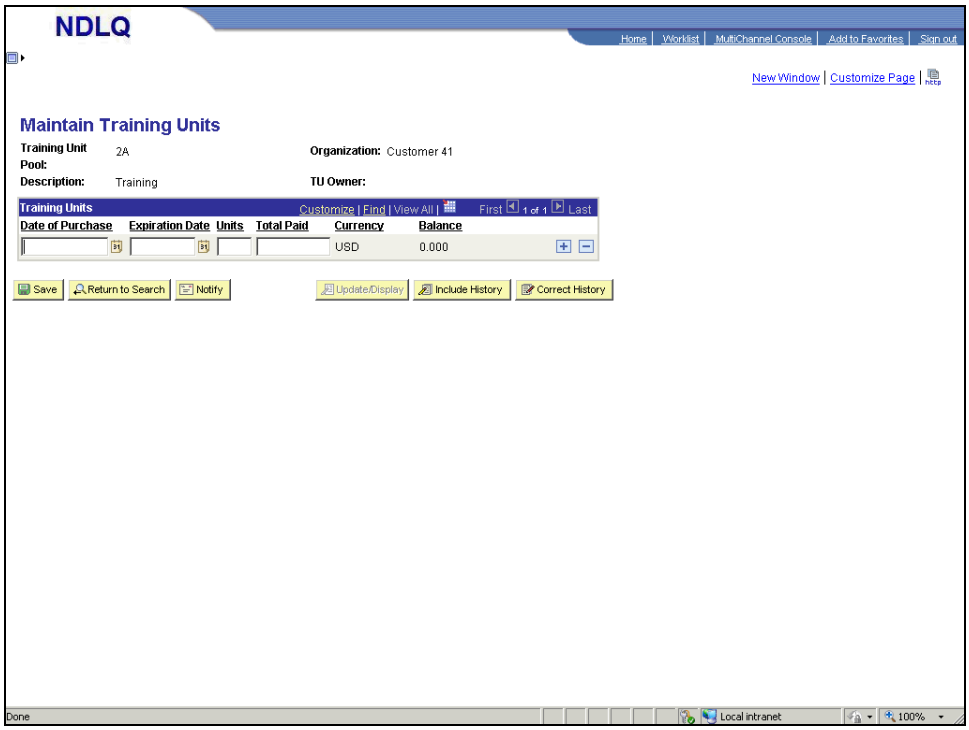


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **Financial Details** link. ▷ Financial Details
6.	Click the **Maintain Training Units** link. – Maintain Training Units



Step	Action
7.	Click the **Collapse Menu** button.
8.	Click in the **Organization ID** field.
9.	Enter the desired information into the **Organization ID** field. Enter "**6693**".
10.	Click the **Search** button. Search
11.	The **Maintain Training Units** page is used to view information for purchased training units and add training units to a training pool.



Step	Action
12.	Enter the desired information into the **Date of Purchase** field. Enter "**12/07/2009**".
13.	Click in the **Expiration Date** field.
14.	Enter the desired information into the **Expiration Date** field. Enter "**12/07/2010**".
15.	**Note**: Learners cannot use training units after the expiration date.
16.	The **Units** field is where you will enter the number of units you wish to purchase.
17.	Click in the **Units** field.
18.	Enter the desired information into the **Units** field. Enter "**1,000**".
19.	The **Total Paid** field is used to enter the total amount paid for the training units.
20.	Click in the **Total Paid** field.
21.	Enter the desired information into the **Total Paid** field. Enter "**10,000**".

Step	Action
22.	Click the **Save** button. Save
23.	Upon saving, notice the **Balance** field is updated accordingly.
24.	**Congratulations**! You should now be able to: - Navigate to the **Maintain Training Units** page. - Add training units to a training unit pool. **End of Procedure.**

4.4 Associating a Training Unit Pool with an External Learner

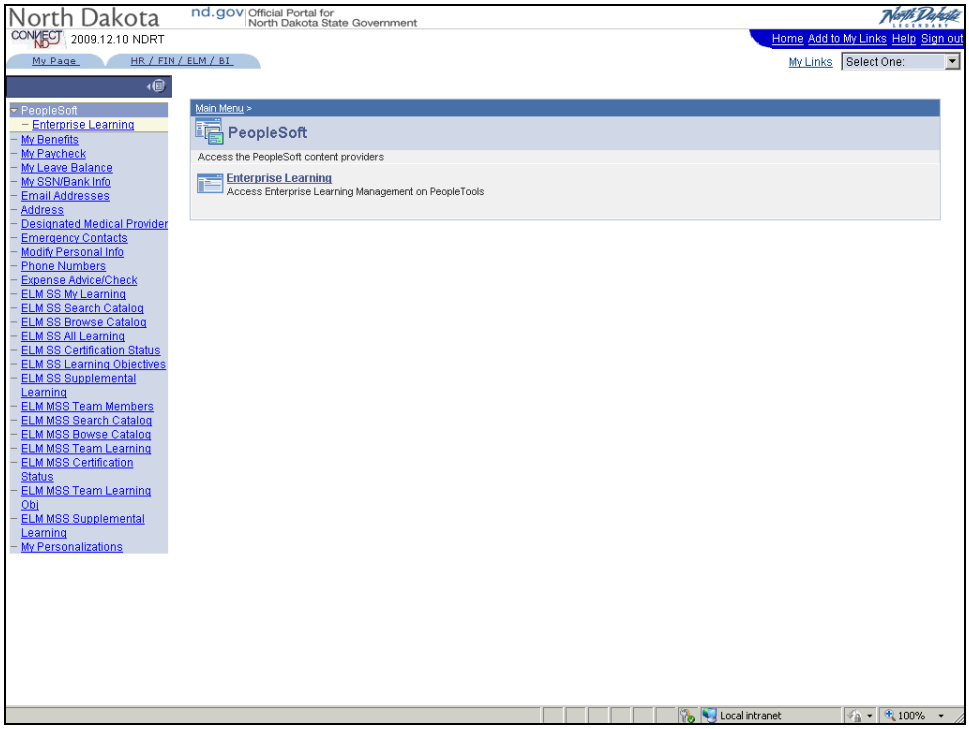
Learners can only use training units from pools that have been directly assigned to them through the learner profile. You can assign one or more training unit pools to a learner on the **Profile Info** page. There is no automated process for assigning training unit pools to learners.

Procedure

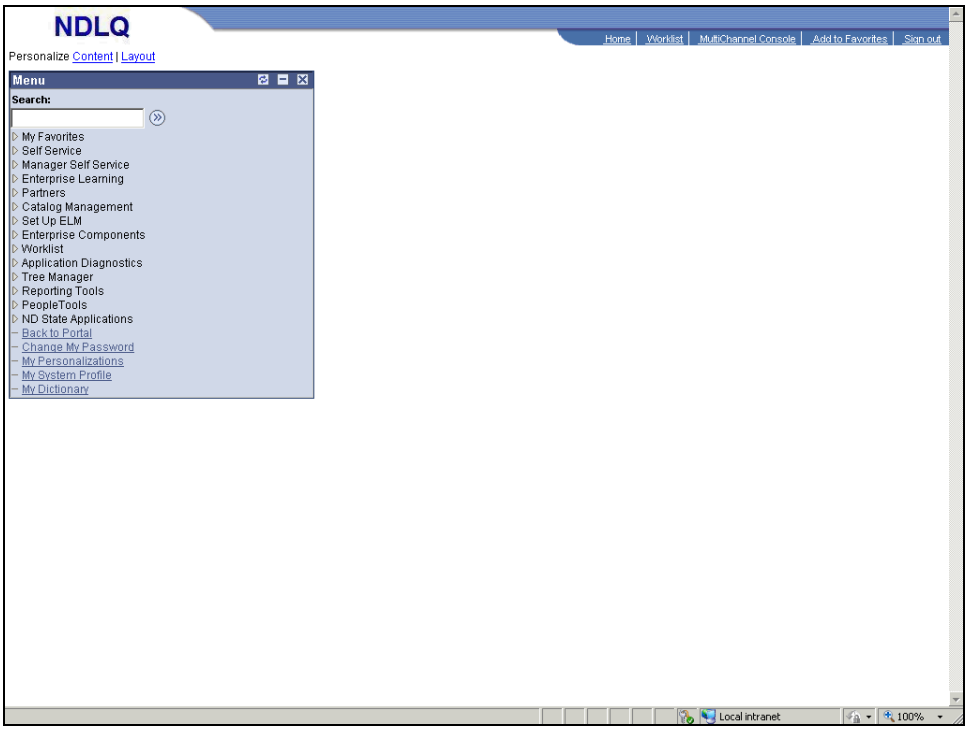
By the end of this topic, you should be able to:

- Navigate to the **External Learners** page.
- Associate a training unit pool with an external learner.

Step	Action
1.	Begin by navigating to the **External Learners** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

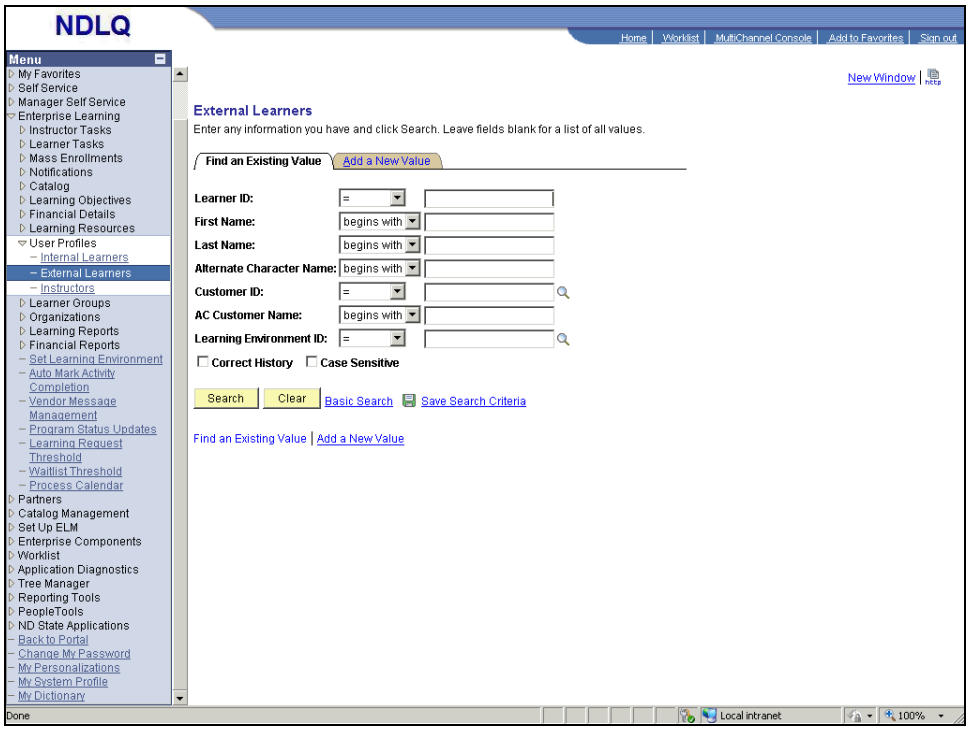


Step	Action
3.	Click the **Enterprise Learning** link. – Enterprise Learning

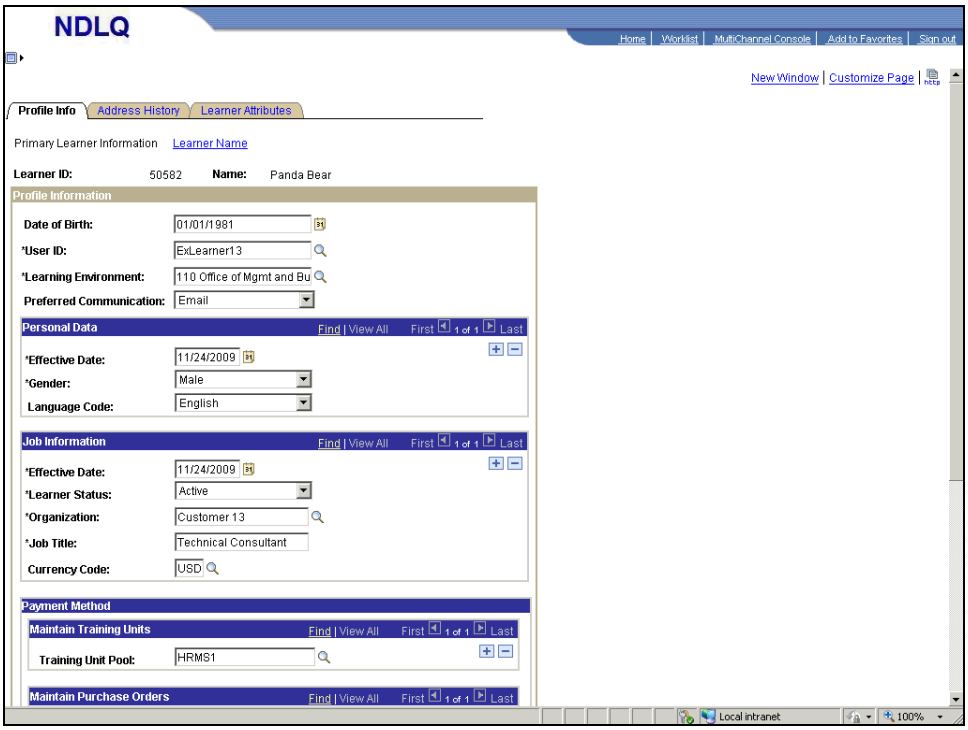


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

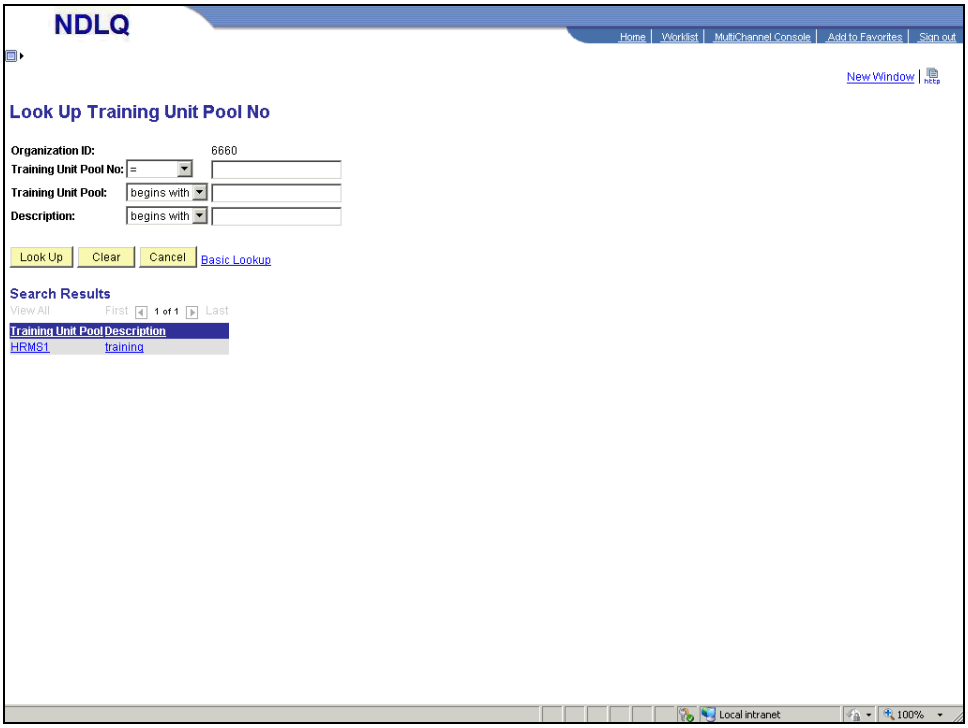
Step	Action
5.	Click the **User Profiles** link. ▷ User Profiles
6.	Click the **External Learners** link. – External Learners



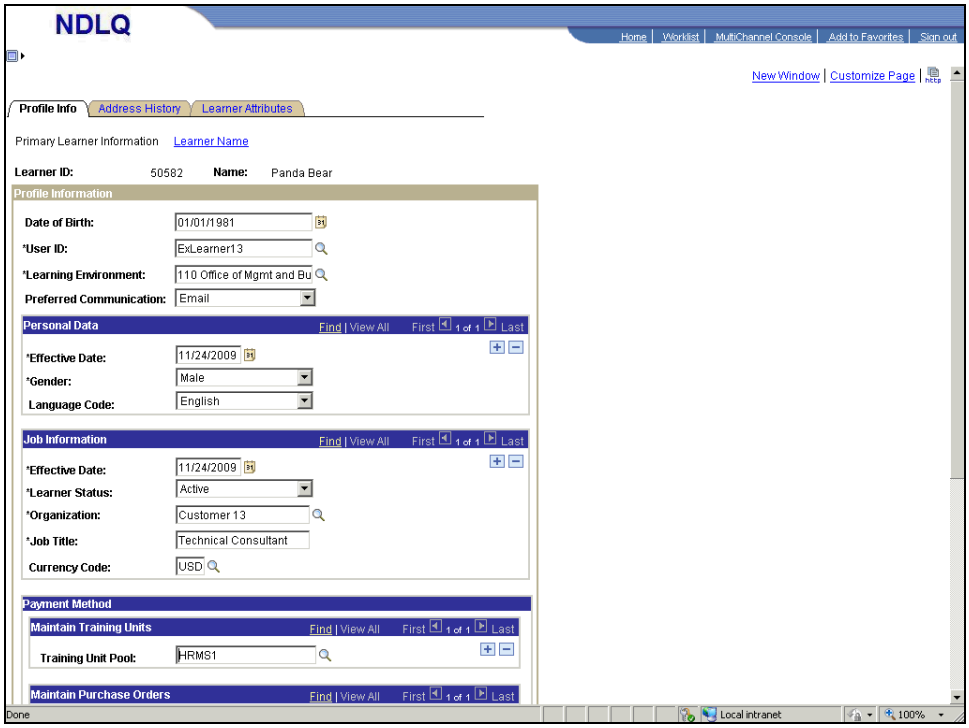
Step	Action
7.	Click the **Collapse Menu** button. ⊟
8.	Click in the **Learner ID** field.
9.	Enter the desired information into the **Learner ID** field. Enter "**50582**".
10.	Click the **Search** button. Search
11.	The **Profile Info** page is used to define primary information about the external learner.



Step	Action
12.	Click the **Training Unit Pool Lookup** button.



Step	Action
13.	Click the "**HRMS1**" link. HRMS1



Step	Action
14.	Click the **navigation** bar.
15.	Click the **Save** button. Save
16.	**Congratulations**! You should now be able to: - Navigate to the **External Learners** page. - Associate a training unit pool with an external learner. **End of Procedure.**

4.5 Setting Up a Purchase Order

Purchase Ordes are similar to a line of credit. Purchase Orders enable customer organizations to spend a designated amount on enrollment fees during a set period of time.

To set up and manage purchase orders for customer organizations:

- Select purchase orders as an authorized payment method for a customer organization.
- Assign general ledger business unit to the customer organization.

- Enter purchase order details.
- Assign purchase order to learners.

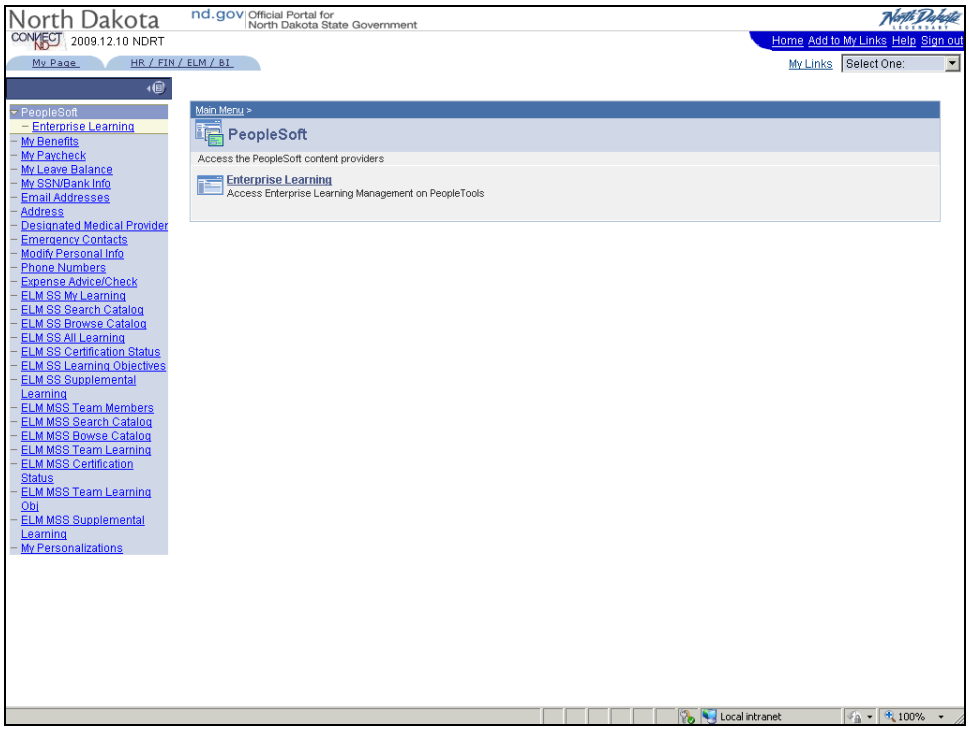
Procedure

By the end of this topic, you will be able to:

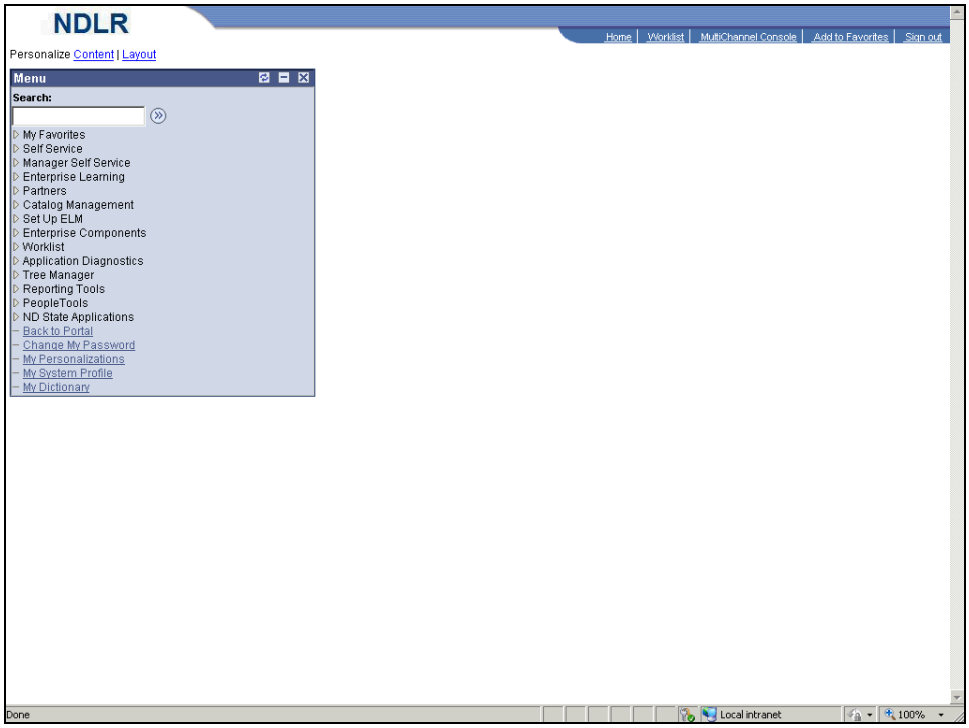
- Navigate to the **Define Customers** page.
- Set up a purchase order.

Note: Purchase Orders are not currently being used by the State of North Dakota.

Step	Action
1.	Begin by navigating to the **Define Customers** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

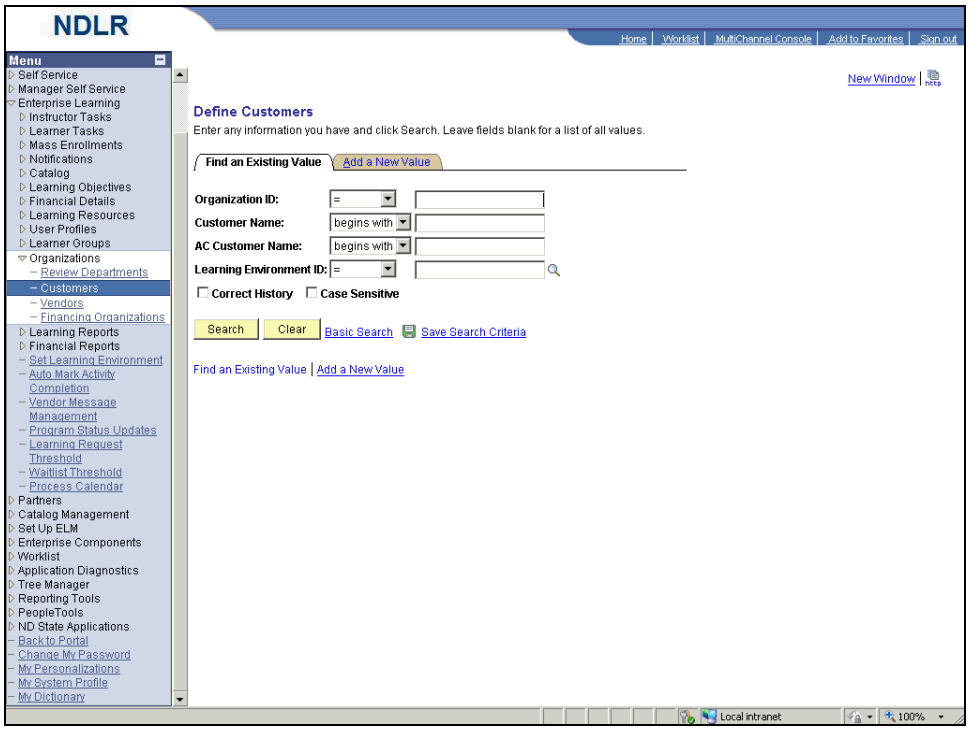


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

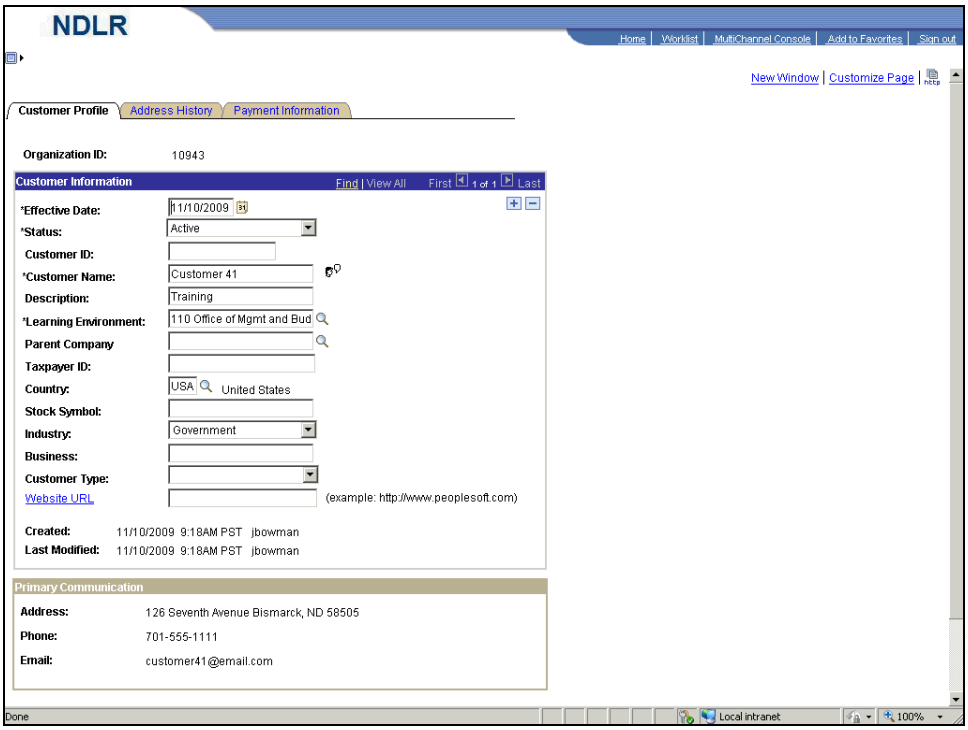


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

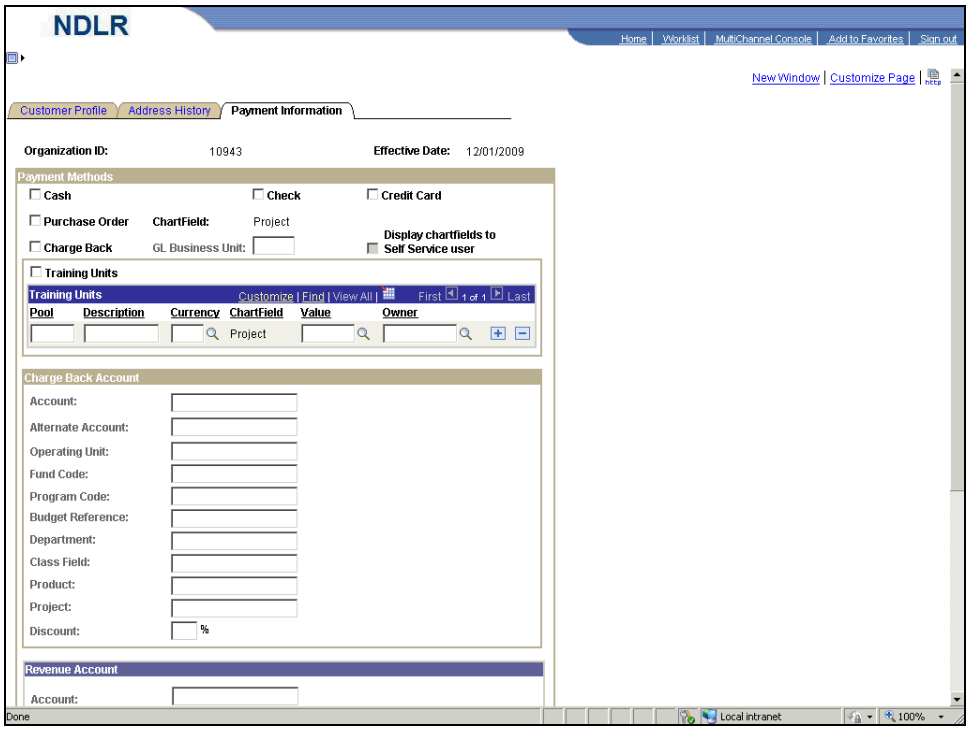
Step	Action
5.	Click the **Organizations** link. ▷ Organizations
6.	Click the **Customers** link. Customers



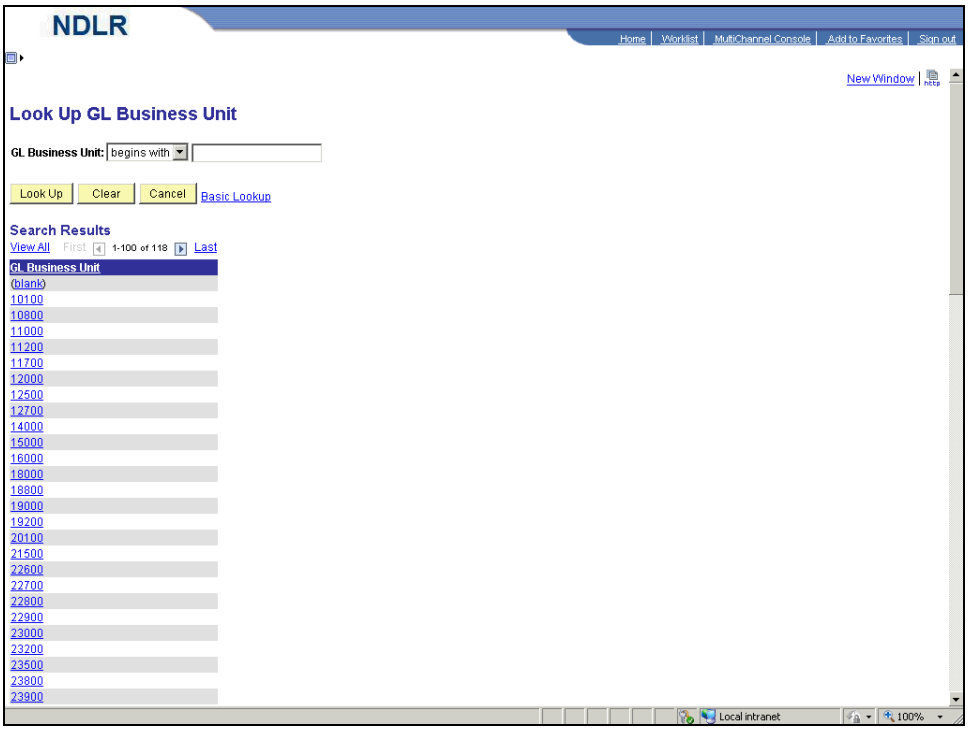
Step	Action
7.	Click the **Collapse (Ctrl+Y) Menu** button.
8.	Click the **Search** button. Search
9.	Click the **Customer 41** link. Customer 41



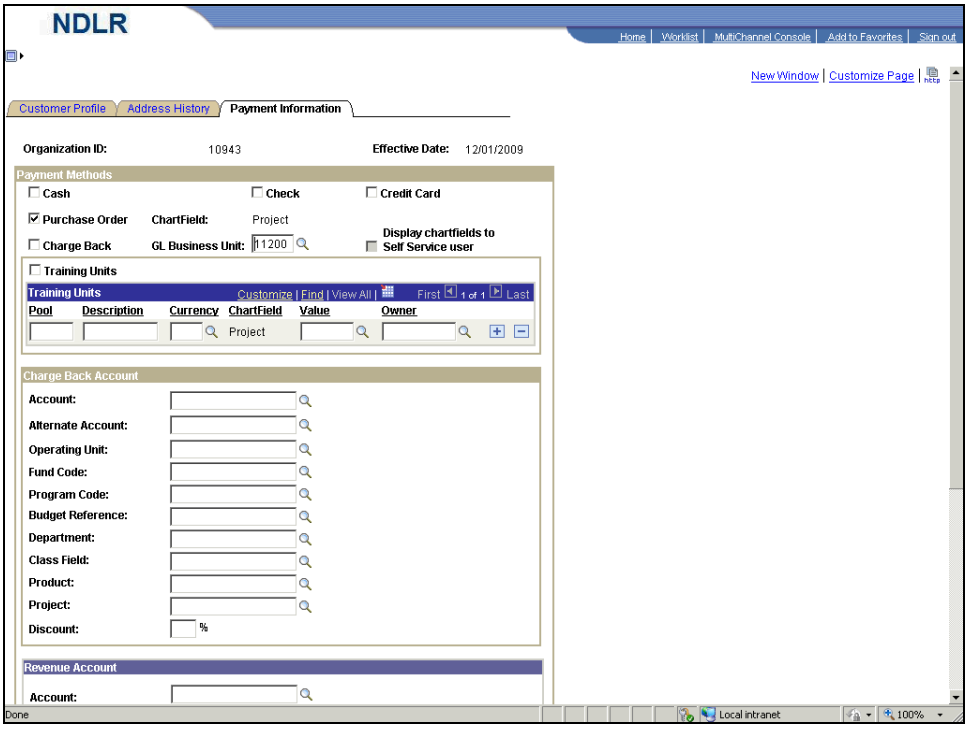
Step	Action
10.	Click the **Add a new row at row 1 (Alt+7)** button.
11.	Click the **Payment Information** tab. Payment Information



Step	Action
12.	Click the **Purchase Order** option. ☐ Purchase Order
13.	Click the **Look up GL Business Unit (Alt+5)** button. 🔍



Step	Action
14.	Click the **11200** link. 11200



Step	Action
15.	Click the scrollbar.
16.	Click the **Save** button. Save
17.	**Congratulations**! You should now be able to: - Navigate to the **Define Customers** page. - Set up a purchase order. **End of Procedure.**

4.6 Maintaining Purchase Orders

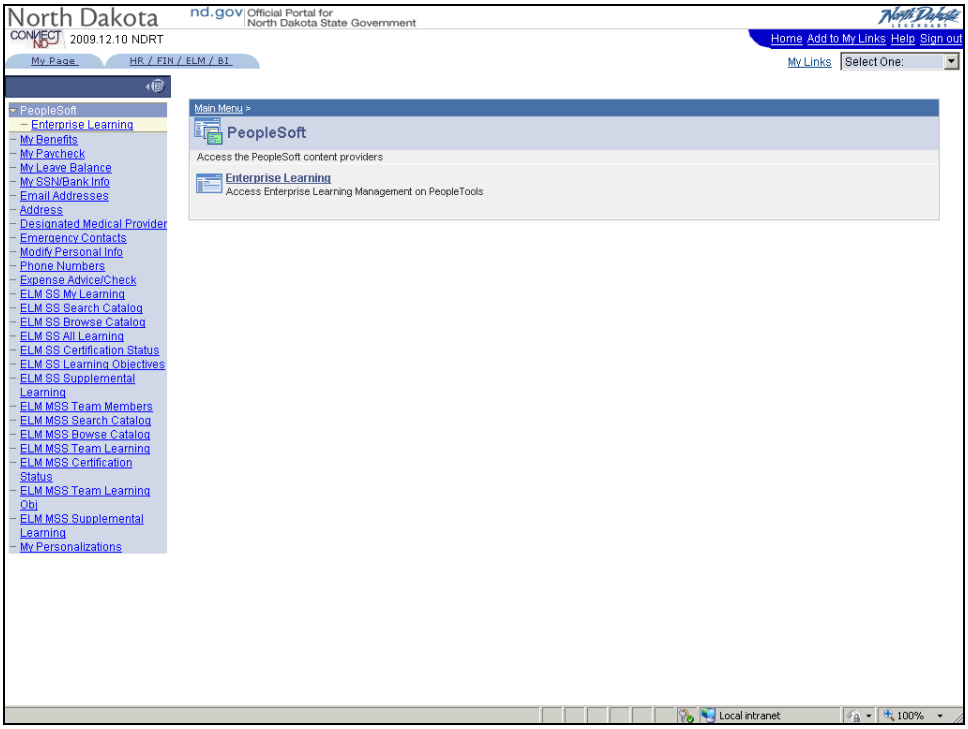
Purchase orders are similar to a line of credit. Purchase orders enable customer organizations to spend a designated amount on enrollment fees during a set period of time. Purchase orders need to be updated and revised as often as required, based on the customer's training changes.

Procedure

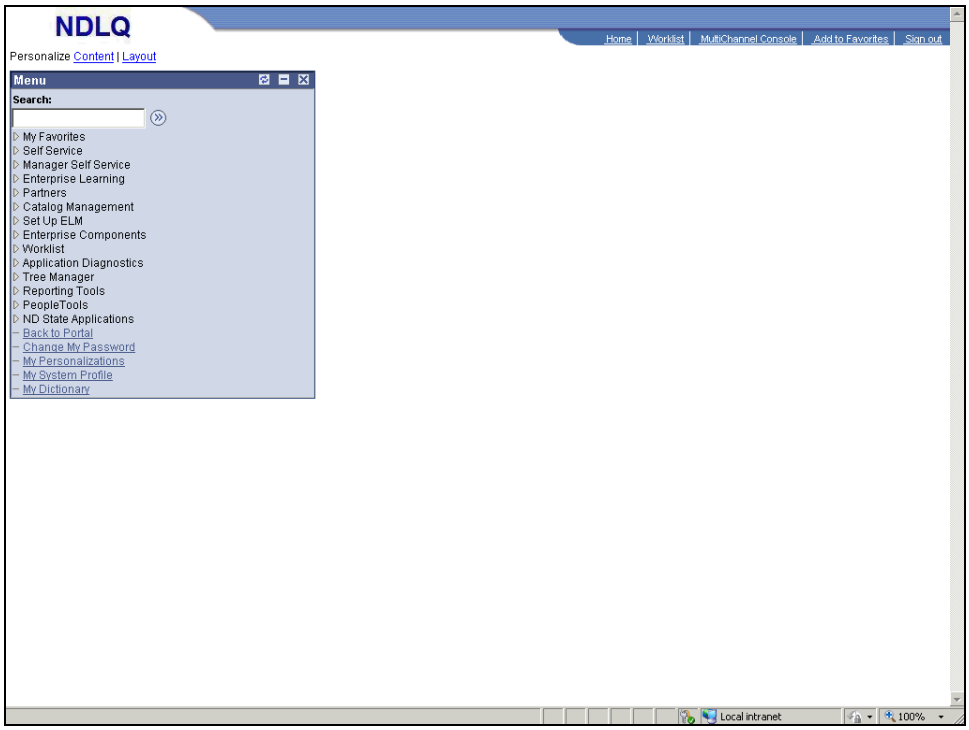
By the end of this topic, you will be able to:

- Navigate to the **Maintain Purchase Orders** page.
- Maintain purchase orders.

Step	Action
1.	Begin by navigating to the **Maintain Purchase Orders** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

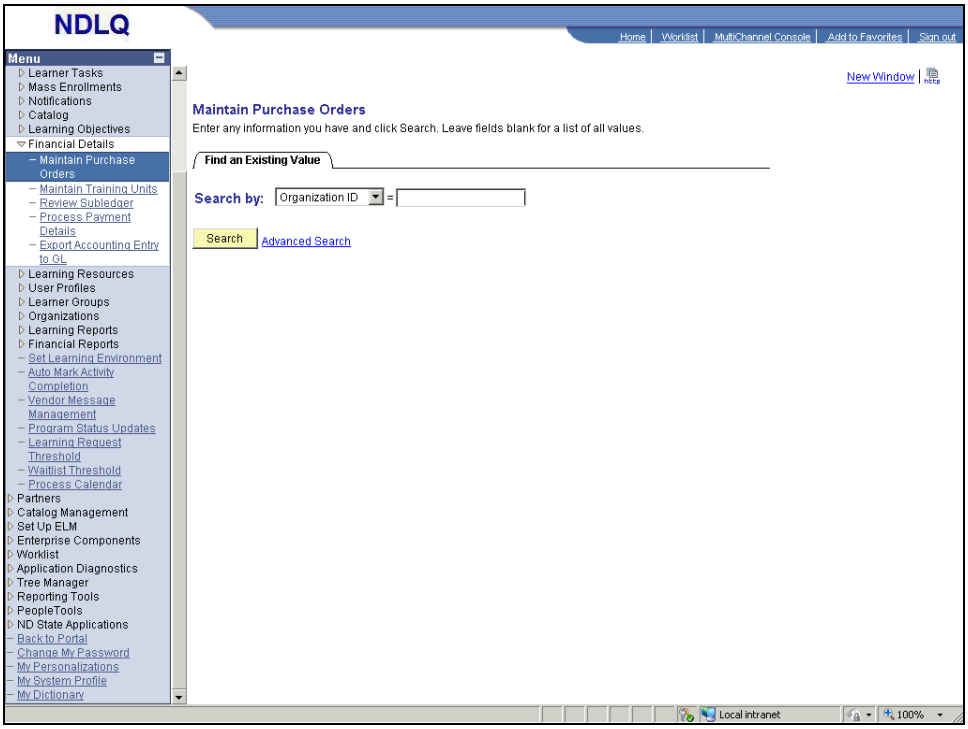


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

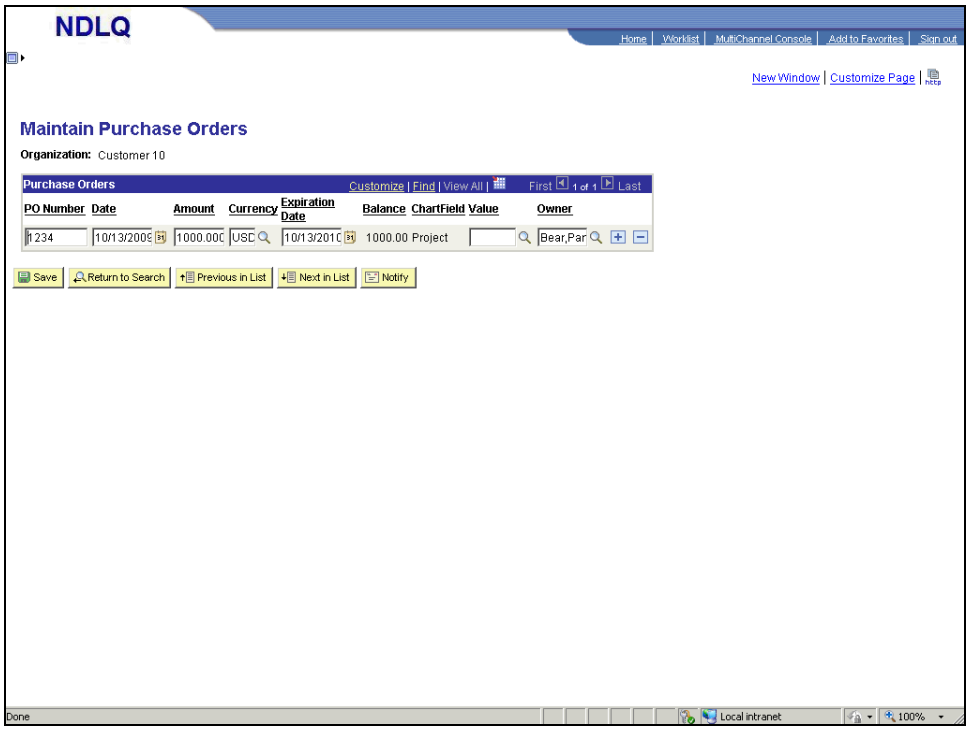


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **Financial Details** link. ▷ Financial Details
6.	Click the **Maintain Purchase Orders** link.

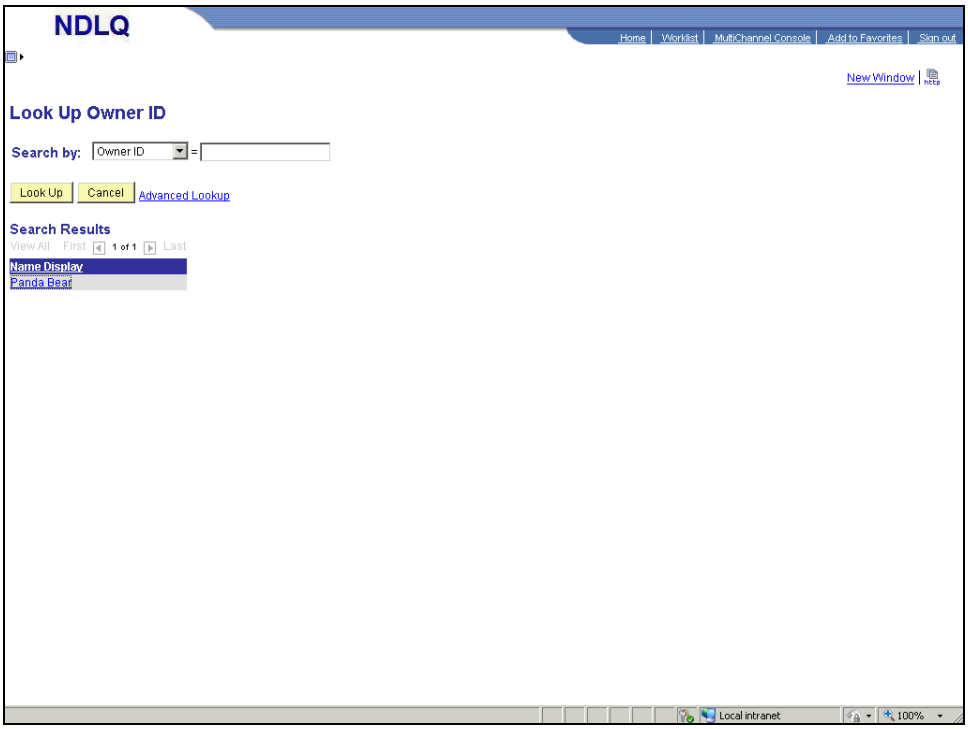


Step	Action
7.	Click the **Collapse Menu** button. ⊟
8.	Click the **Search** button. Search
9.	Select the "**6673**" list item. 6673



Step	Action
10.	Click the **Add a new row** button.
11.	Enter the desired information into the **PO Number** field. Enter "**5678**".
12.	Click in the **Date** field.
13.	Enter the desired information into the **Date** field. Enter "**12/09/2009**".
14.	Click in the **Amount** field.
15.	Enter the desired information into the **Amount** field. Enter "**500.00**".
16.	Click in the **Currency** field.
17.	Enter the desired information into the **Currency** field. Enter "**USD**".

Step	Action
18.	Click in the **Expiration Date** field.
19.	Enter the desired information into the **Expiration Date** field. Enter "**06/09/2010**".
20.	Enter the desired information into the **Value** field. Enter "**0000000112**".
21.	Click the **Owner Lookup** button.



Step	Action
22.	Select the "**Panda Bear**" link.

Step	Action
23.	Click the **Save** button.
24.	**Congratulations**! You should now be able to: - Navigate to the **Maintain Purchase Orders** page. - Maintain purchase orders. **End of Procedure.**

4.7 Associating a Purchase Order with an External Learner

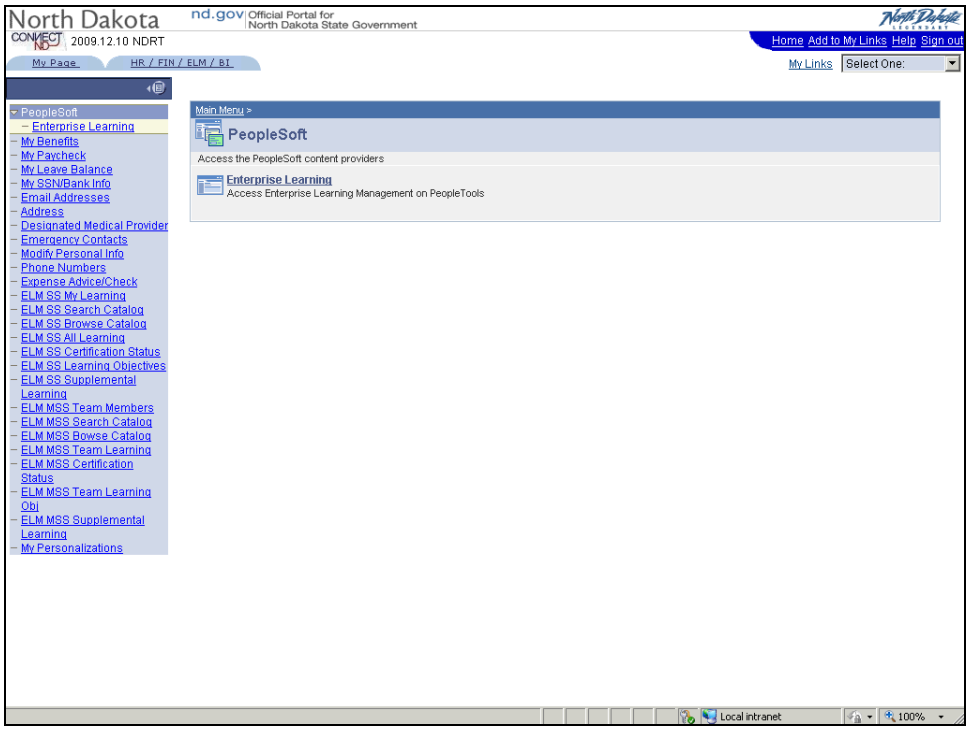
External Learners can be assigned to purchase orders, enabling them to enroll in courses. Course fees are then applied to the assigned purchase order.

Procedure

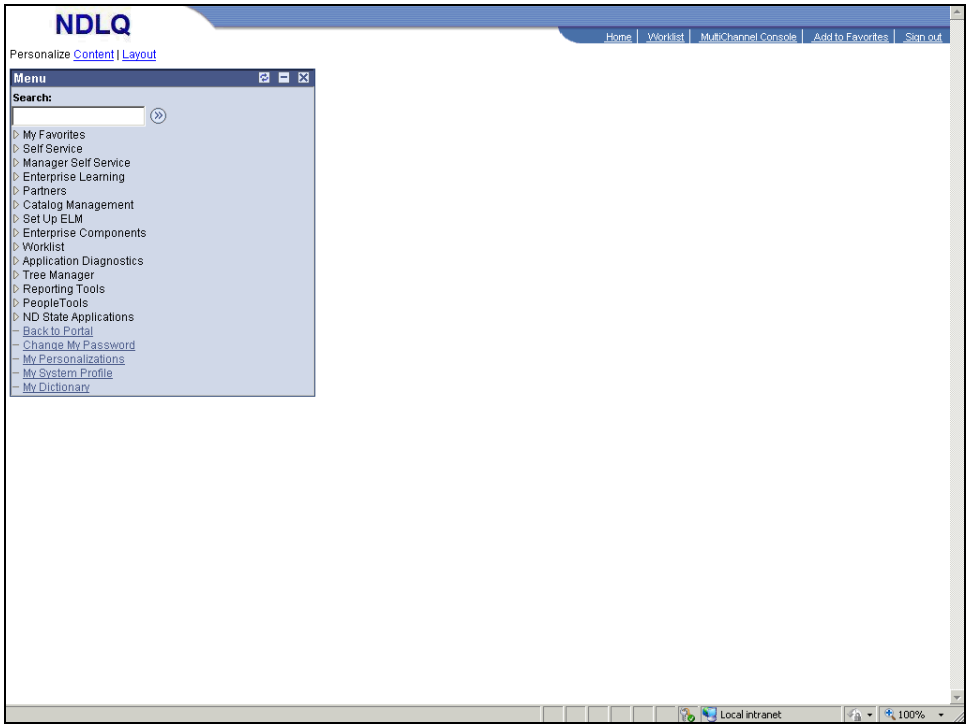
By the end if this topic, you will be able to:

- Navigate to the **External Learners** page.
- Associate a Purchase Order with an External Learner.

Step	Action
1.	Begin by navigating to the **External Learners** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

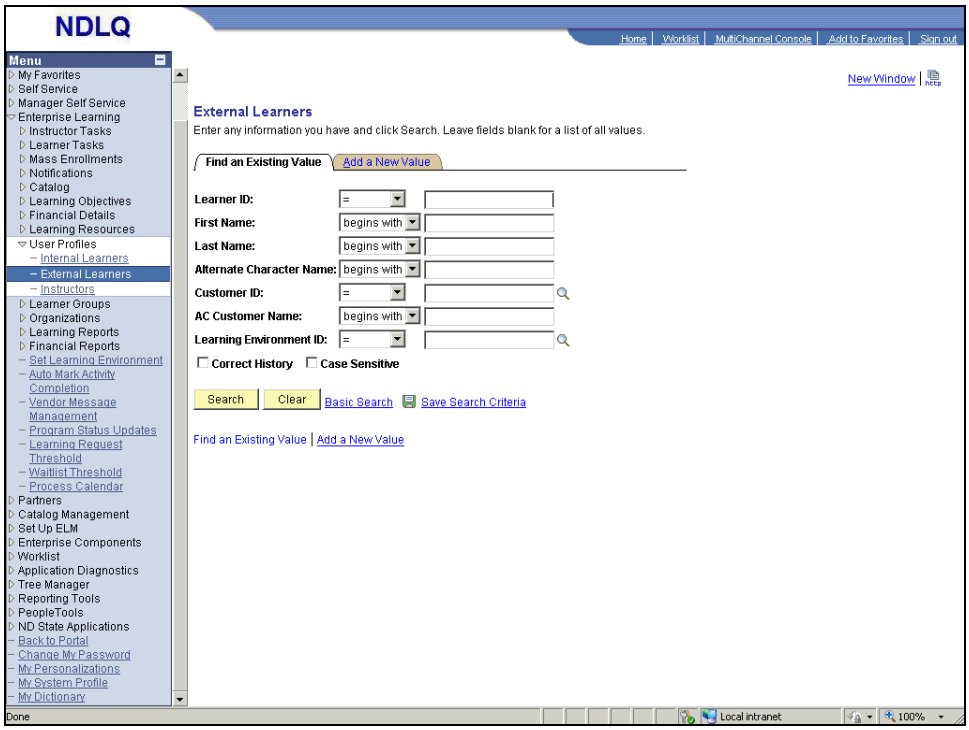


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

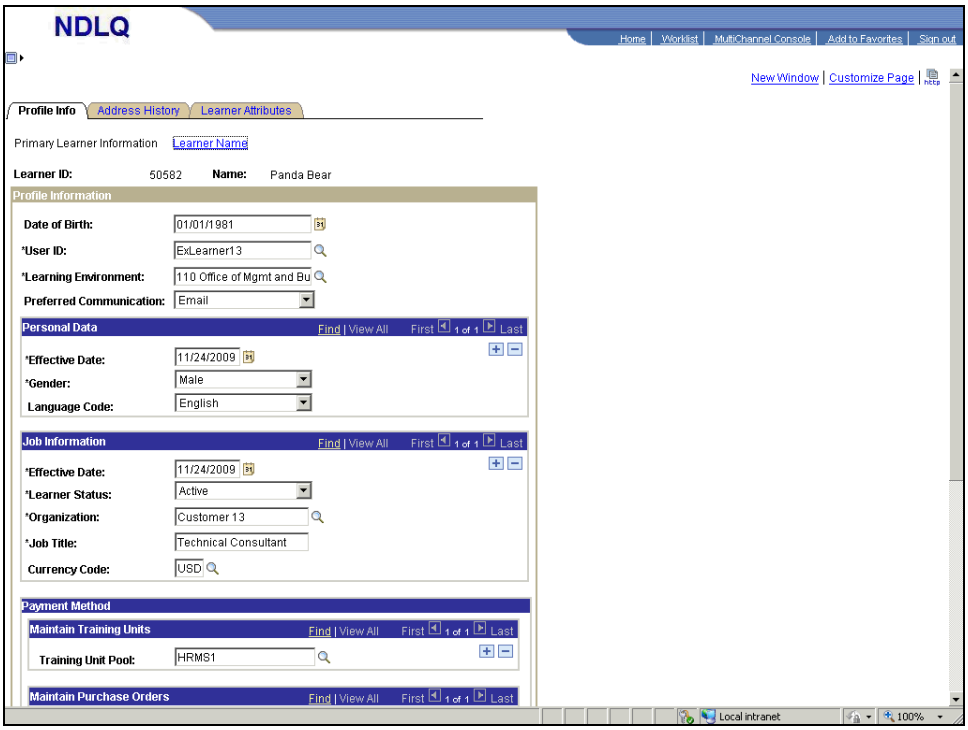


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

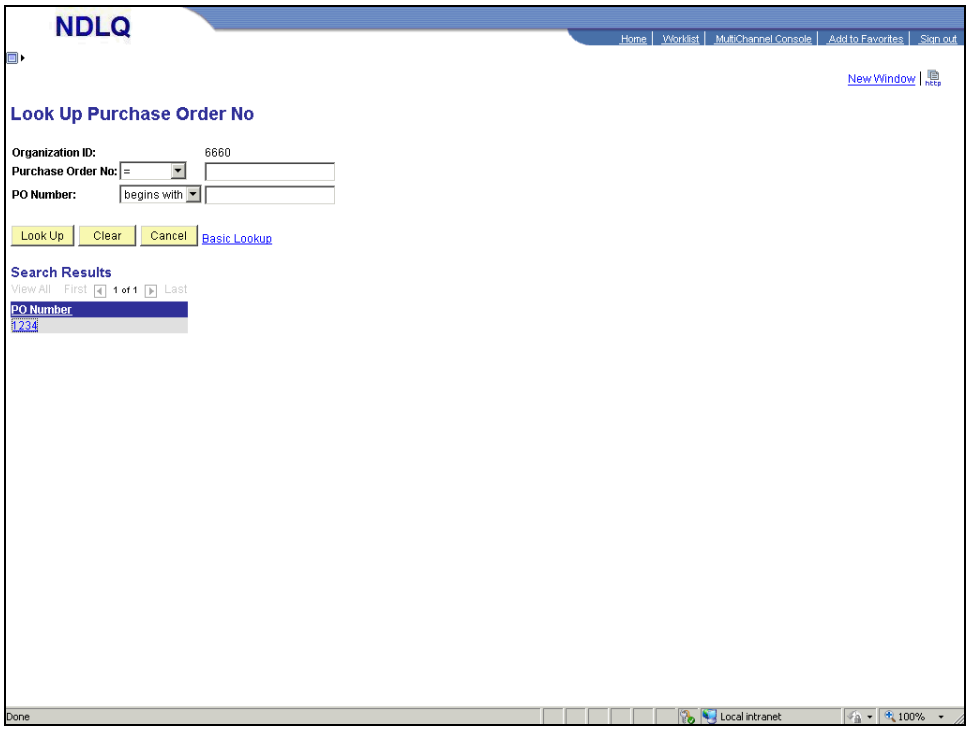
Step	Action
5.	Click the **User Profiles** link. ▷ User Profiles
6.	Click the **External Learners** link. External Learners



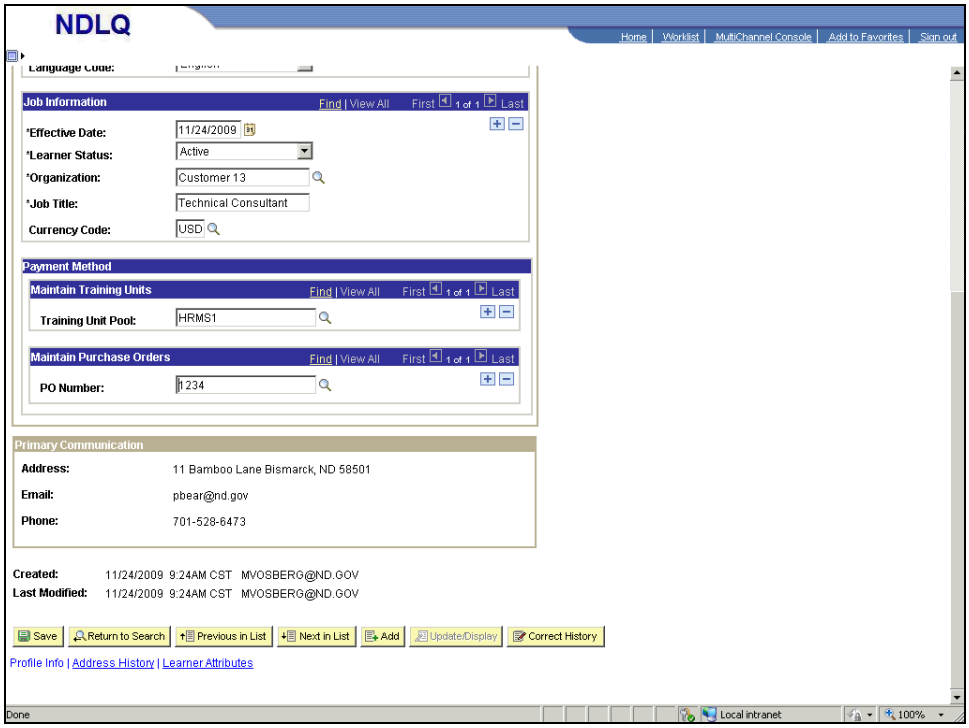
Step	Action
7.	Click the **Collapse (Ctrl+Y) Menu** button.
8.	Click in the **Customer ID** field.
9.	Enter the desired information into the **Customer ID** field. Enter "**customer 13**".
10.	Click the **Search** button.
11.	Click the **50582** link.
12.	Use the **Profile Info** page to select the learner's user ID, learning environment and organization.



Step	Action
13.	Click the scrollbar.
14.	Use the **PO Number** field to associate an existing purchase order to an external learner.
15.	Click the **PO Number Lookup** button.



Step	Action
16.	Select the "**1234**" list item.



Step	Action
17.	Click the **Save** button. Save
18.	**Congratulations**! You should now be able to: - Navigate to the **External Learners** page. - Associate a Purchase Order with an External Learner. **End of Procedure.**

Lesson 5: Creating a Catalog Entry and Managing Learning Activities

5.1 Creating a Catalog Entry

The catalog supplies detailed information about each activity (class). This detailed information consists of a description of its content, learning objectives and prerequisites to name a few.

Catalog items are specific topics of learning. All activities that belong to a given catalog item share the same prerequisites, equivalent courses and objectives. When you define a catalog item, you have the option to select prerequisites, equivalent courses and objectives that apply to all of the catalog item's activities. You also select various default values for the activities.

To define catalog items:

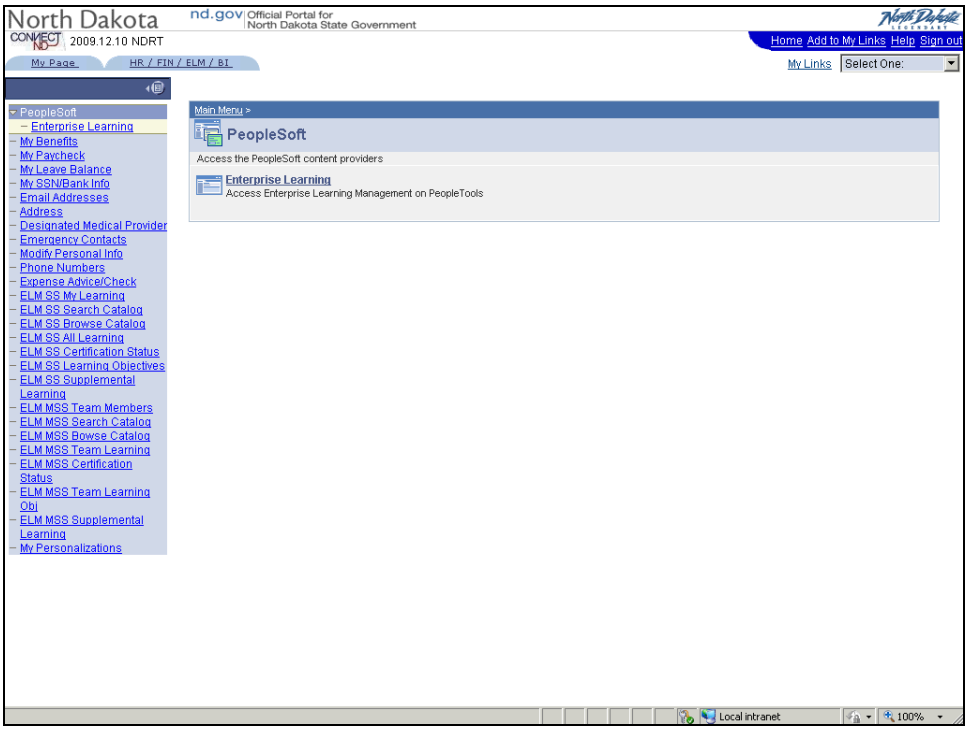
- Enter the catalog item's name, course code and other basic information.
- Select required and recommended prerequisites (optional).
- Identify equivalent catalog items (optional).
- Add notes and attach files (optional).
- Define security by selecting the learning environments and Learner Groups that can access the catalog item.
- Select categories and objectives for the catalog item.
- Define delivery methods for the catalog item's activities.

Procedure

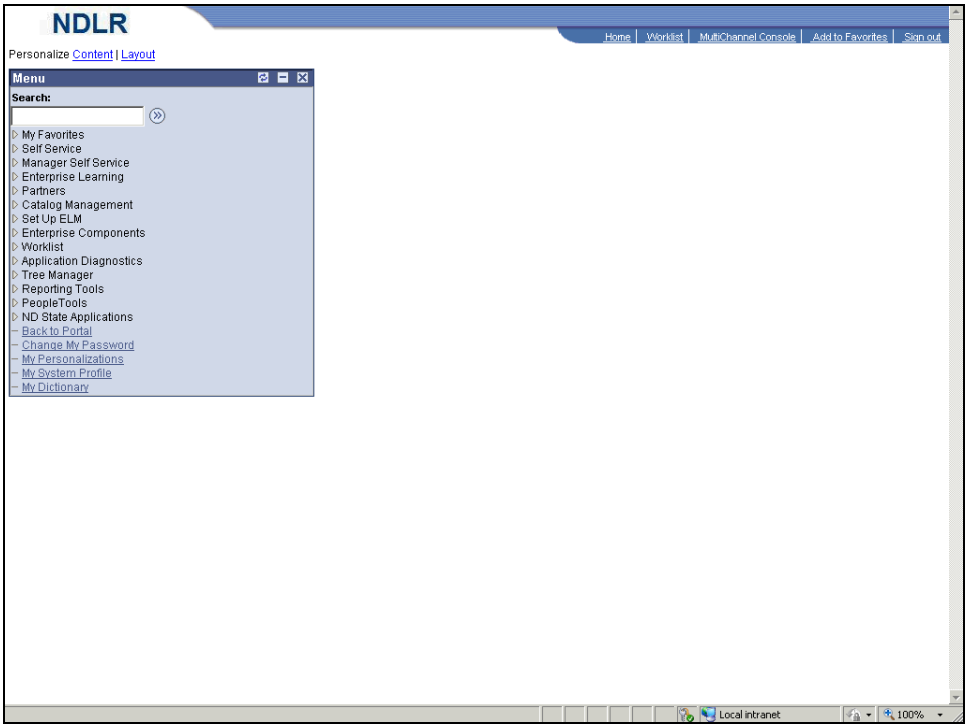
By the end of this topic, you will be able to:

- Navigate to the **Item Details** page.
- Create a catalog entry.

Step	Action
1.	Begin by navigating to the **Maintain Items** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

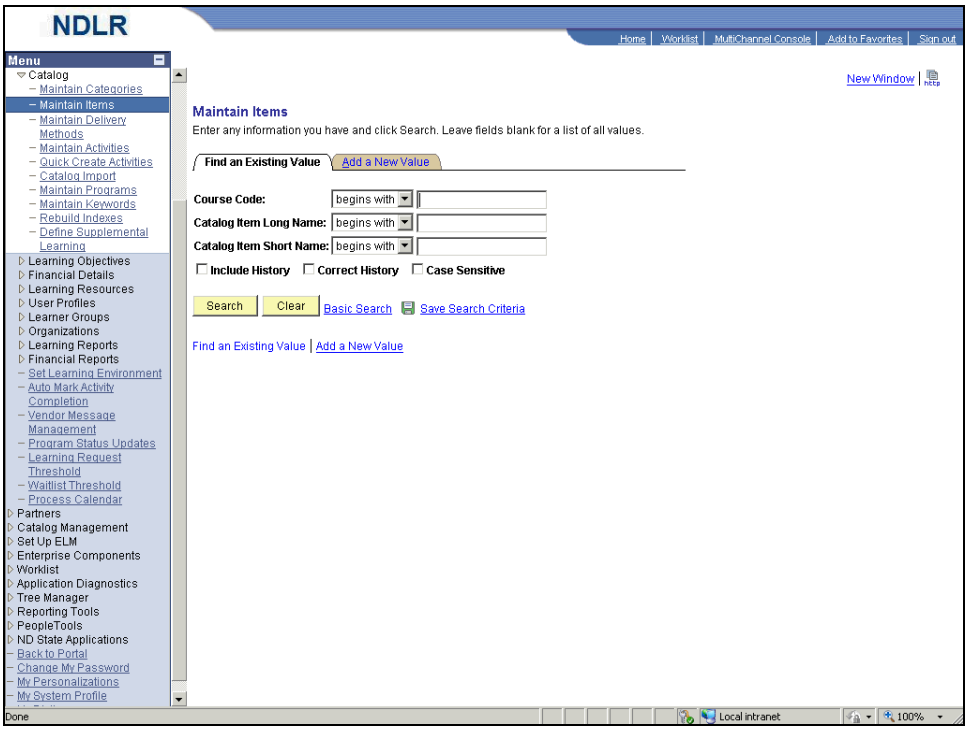


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

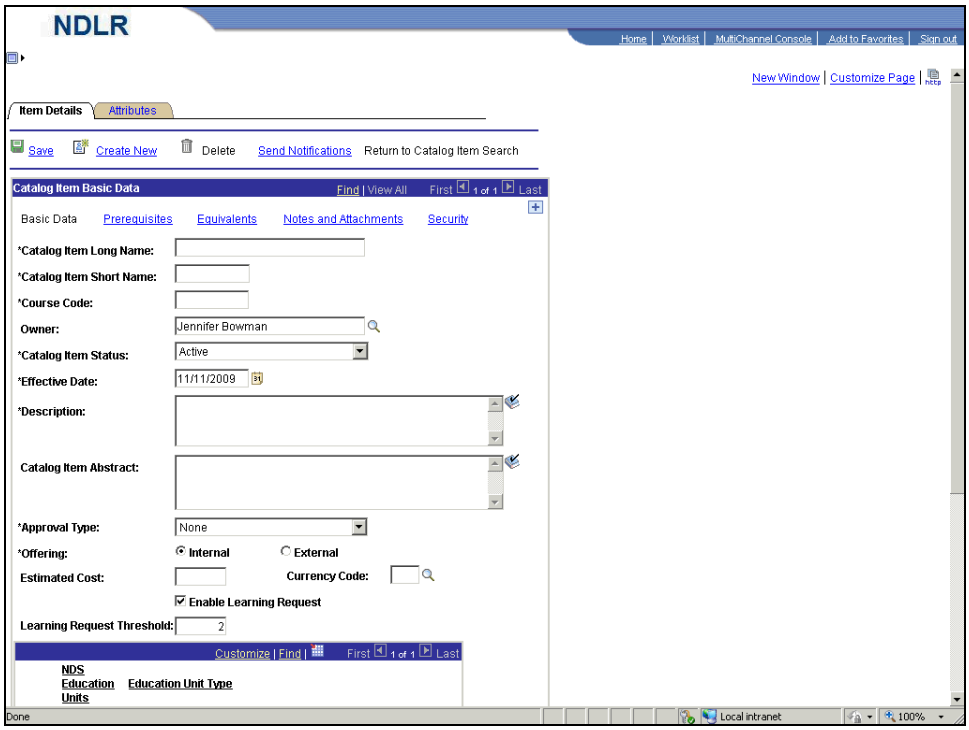


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **Catalog** link. ▷ Catalog
6.	Click the **Maintain Items** link. – Maintain Items

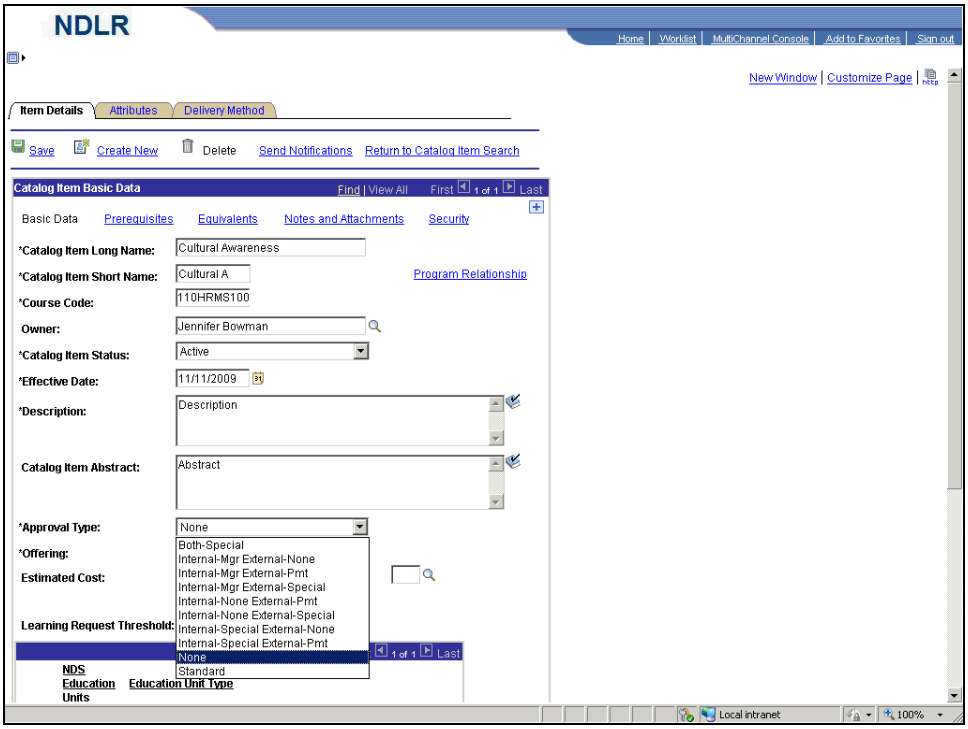


Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Add a New Value** tab. Add a New Value
9.	Use the **Item Details - Catalog Item Basic Data** page to enter the name, course code and other basic information for a catalog item.

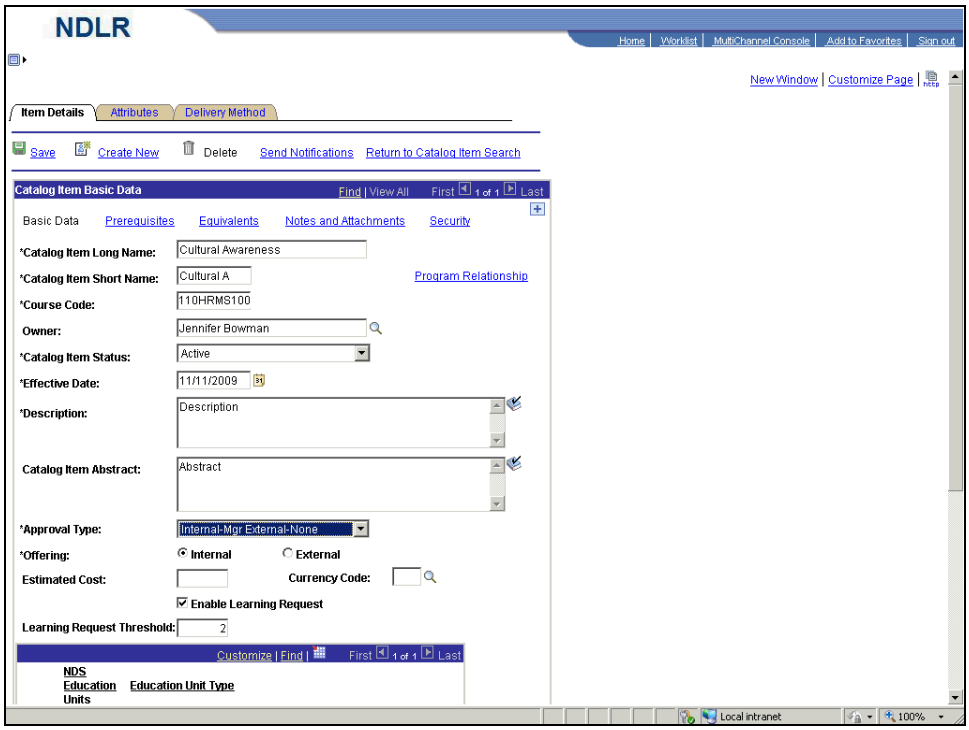


Step	Action
10.	Click in the **Catalog Item Long Name** field.
11.	Enter the desired information into the **Catalog Item Long Name** field. Enter "**Cultural Awareness**".
12.	Click in the **Catalog Item Short Name** field.
13.	The **Course Code** field is a unique identifier for the course. **Note**: The **Course Code** should consist of an agencies 3-digit **Business Unit** followed by an agencies **Division** followed by a random four digit number.
14.	Click in the **Course Code** field.
15.	Enter the desired information into the **Course Code** field. Enter "**110HRMS1000**".
16.	The **Owner** field is for informational purposes. This could be the person to contact with issues concerning the catalog item.
17.	The **Catalog Item Status** field identifies whether the course is active or inactive.
18.	The **Effective Date** defaults to the system date. This should reflect the date when the catalog item will become active.

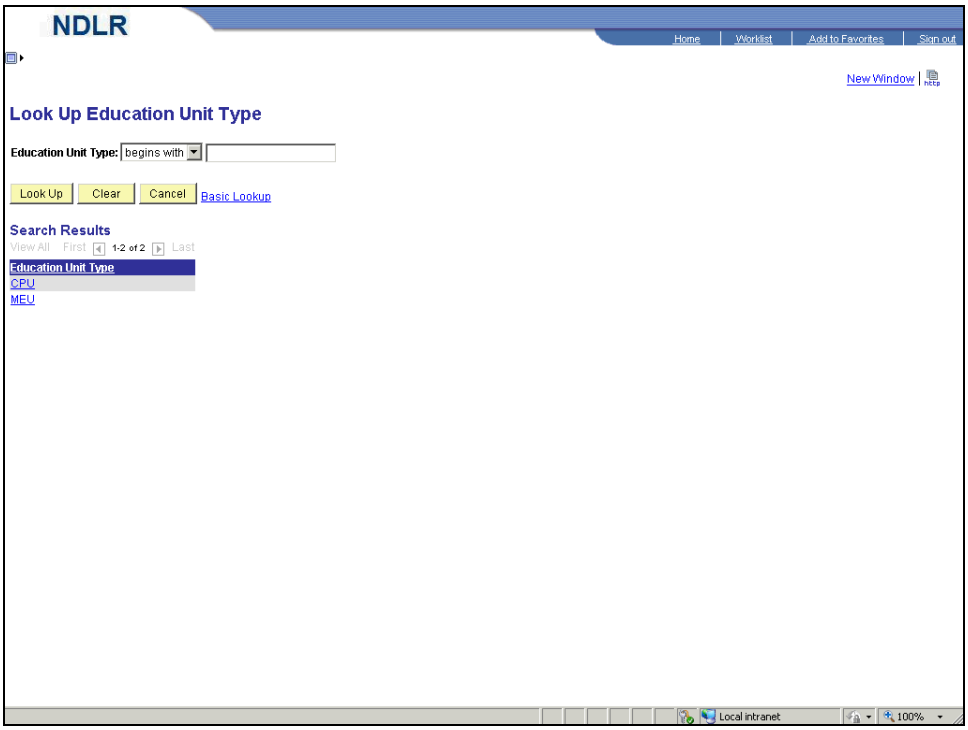
Step	Action
19.	When entering text in the **Description** field, certain functions like: creating bullet points cannot be entered unless you copy and paste from a Word document.
20.	Click in the **Description** field.
21.	Enter the desired information into the **Description** field. Enter "**Description**".
22.	Click in the **Catalog Item Abstract** field.
23.	Enter the desired information into the **Catalog Item Abstract** field. Enter "**Abstract**".
24.	Use the **Approval Type** field to specify whether a Manager or Learning Administrator's approval is required to enroll Internal Learners in activities that are associated with a catalog item. If you select Learning Admin, you must select the Administrator through the Administrator field on the **Activity Details** page.
25.	Click the **Approval Type** list.



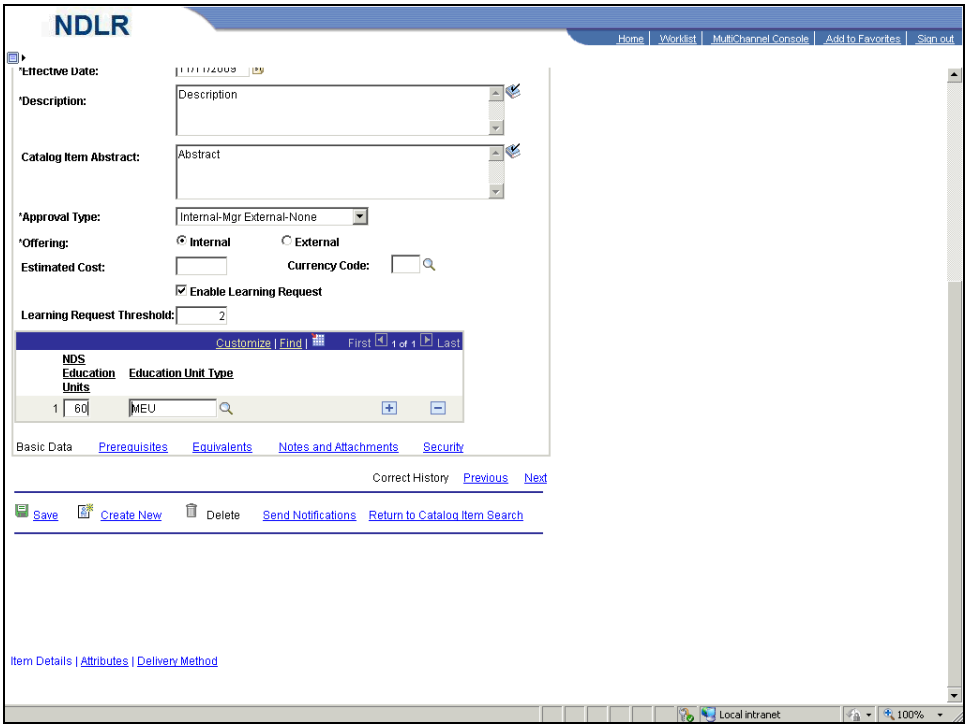
Step	Action
26.	Select the "**Internal-Mgr External-None**" list item. Internal-Mgr External-None



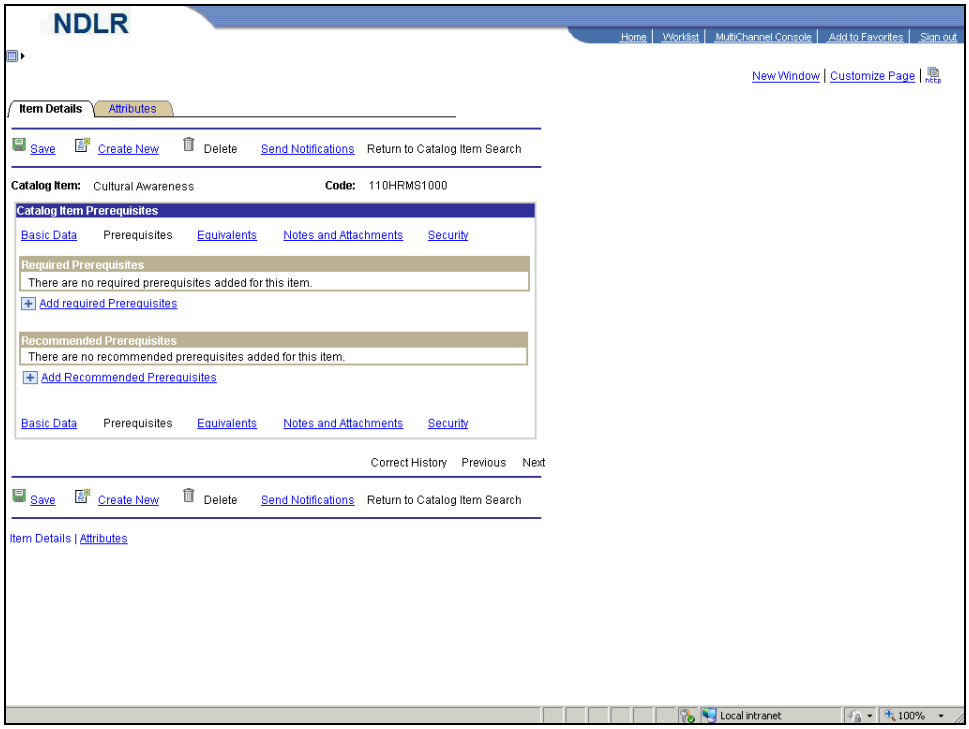
Step	Action
27.	Click the scrollbar.
28.	The **Education Units** field is used to enter the number of continuing education units that you want accredited to a learner on completion of this learning activity. **Note**: This value is for informational purposes only.
29.	Click in the **NDS Education Units** field.
30.	Enter the desired information into the **NDS Education Units** field. Enter "**60**".
31.	Click the **Education Unit Type Lookup** button.



Step	Action
32.	Select the "**MEU**" link. MEU

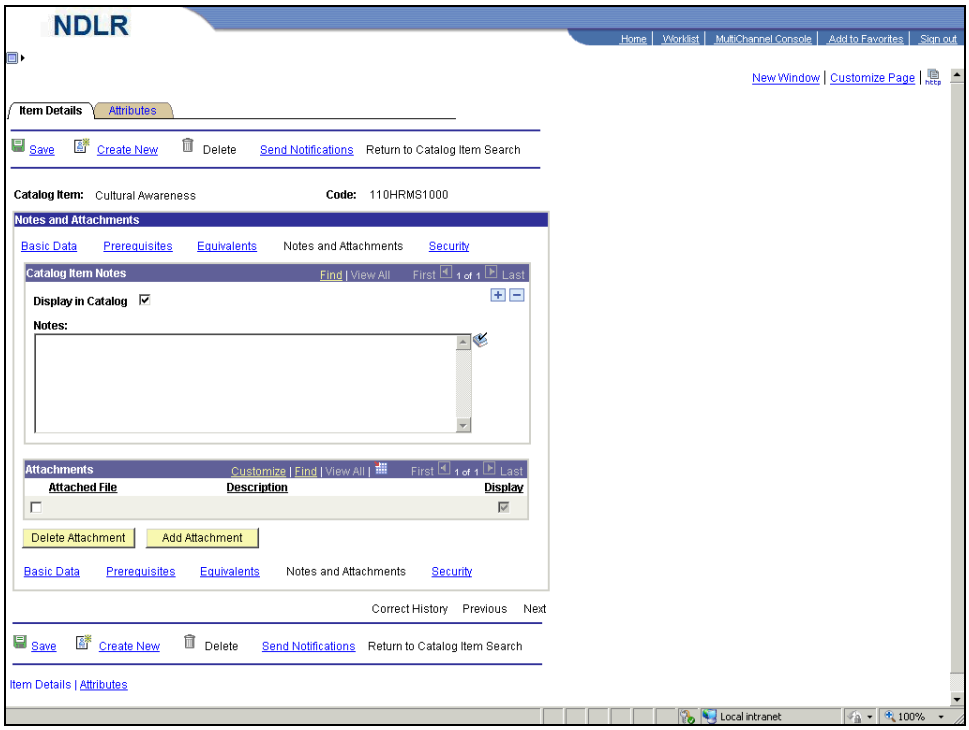


Step	Action
33.	Click the **Prerequisites** link. Prerequisites
34.	If pre-requisites are applicable, use the **Catalog Item - Prerequisites** page to define required and recommended prerequisites. Prerequisites can be other catalog items or objectives. To enroll in an activity when prerequisites are enforced, a learner must complete any required prerequisites or an equivalent catalog item, if applicable.

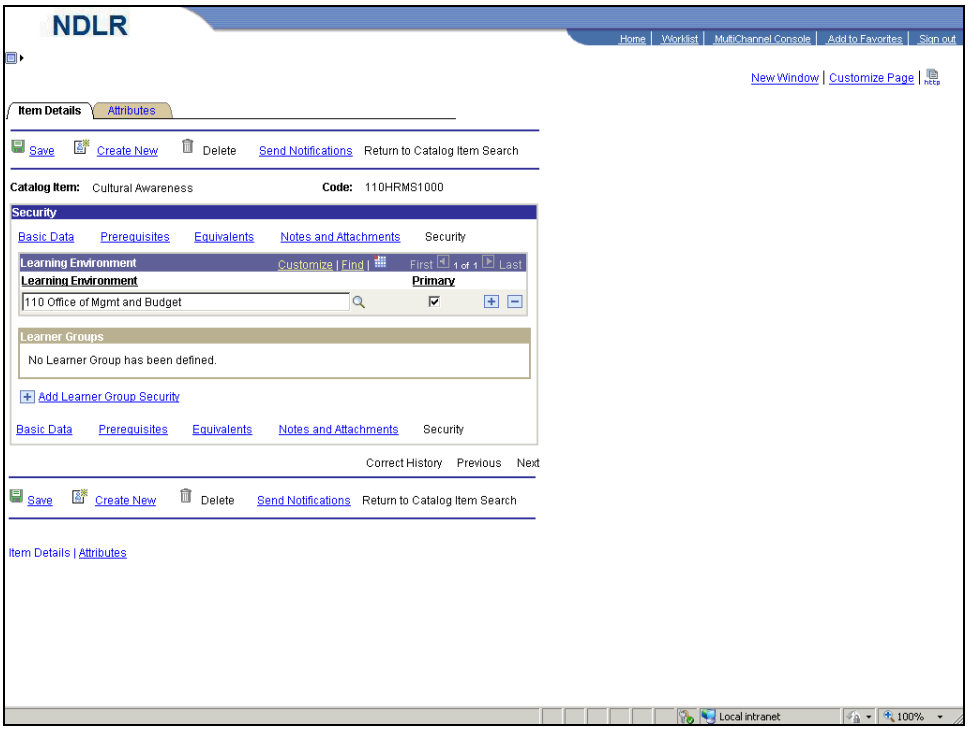


Step	Action
35.	Click the **Equivalents** link. Equivalents
36.	Use the **Equivalents** page to identify other activities that are equivalent to this one.

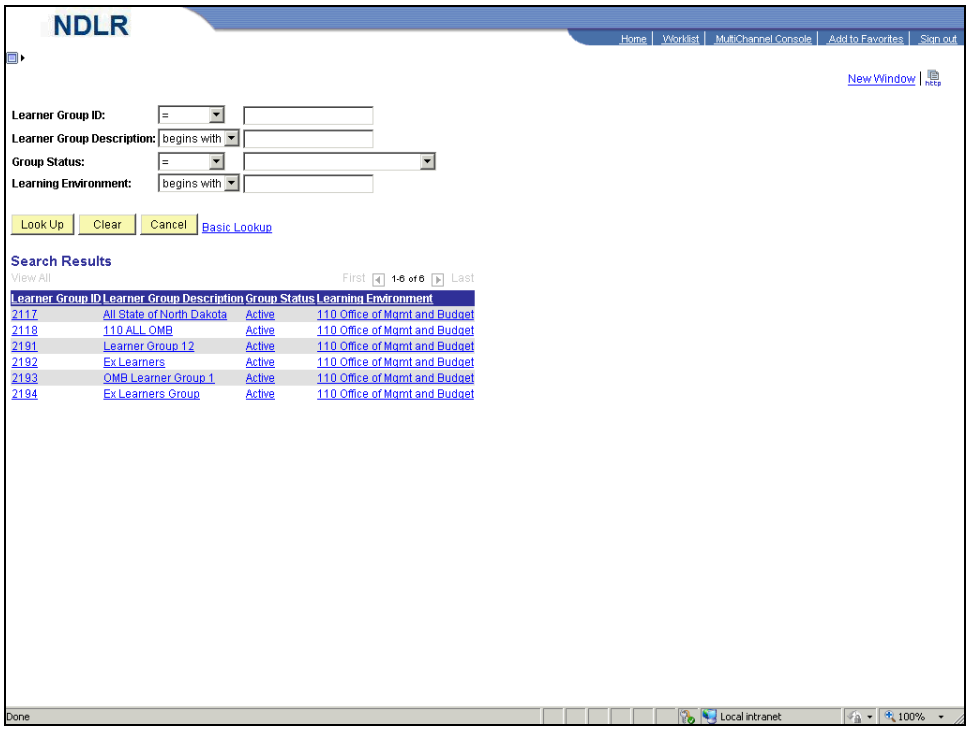
Step	Action
37.	Click the **Notes and Attachments** link. Notes and Attachments
38.	Use the **Notes and Attachments** page to capture important notes pertaining to the activity and/or to attach documents to support the activity.



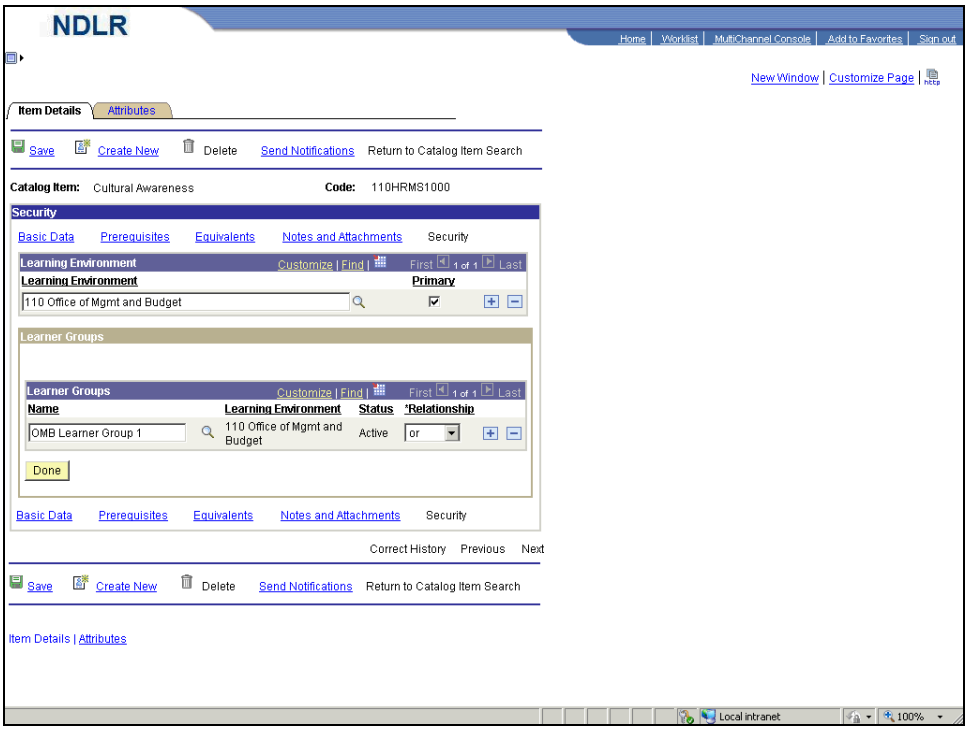
Step	Action
39.	Click the **Security** link. Security
40.	Use the **Catalog Item - Security** page to share a catalog item with other learning environments and to select the learner groups that can access the catalog item.
41.	By default, the administrators Learning Environment is designated as the primary environment. As with categories, initially an administrator can make a catalog item available only to learner groups that are associated with the administrators environment.



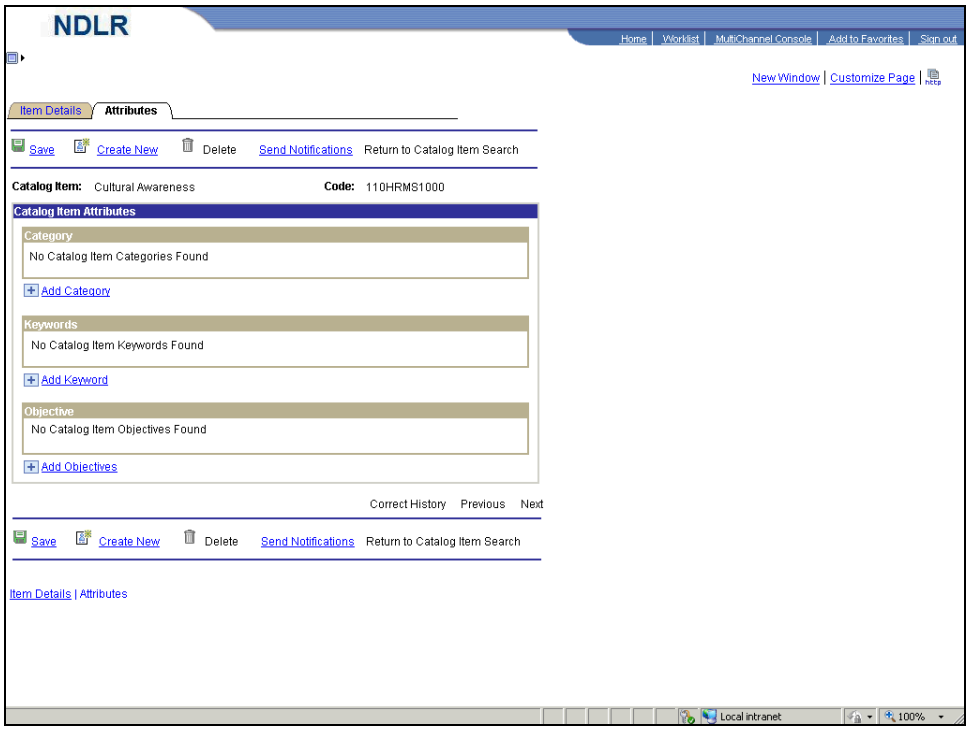
Step	Action
42.	Click the **Add Learner Group Security** link. Add Learner Group Security
43.	The **Learner Group** section defines the learner groups that can enroll in this catalog item.
44.	Click the **Learner Group Prompt** button.



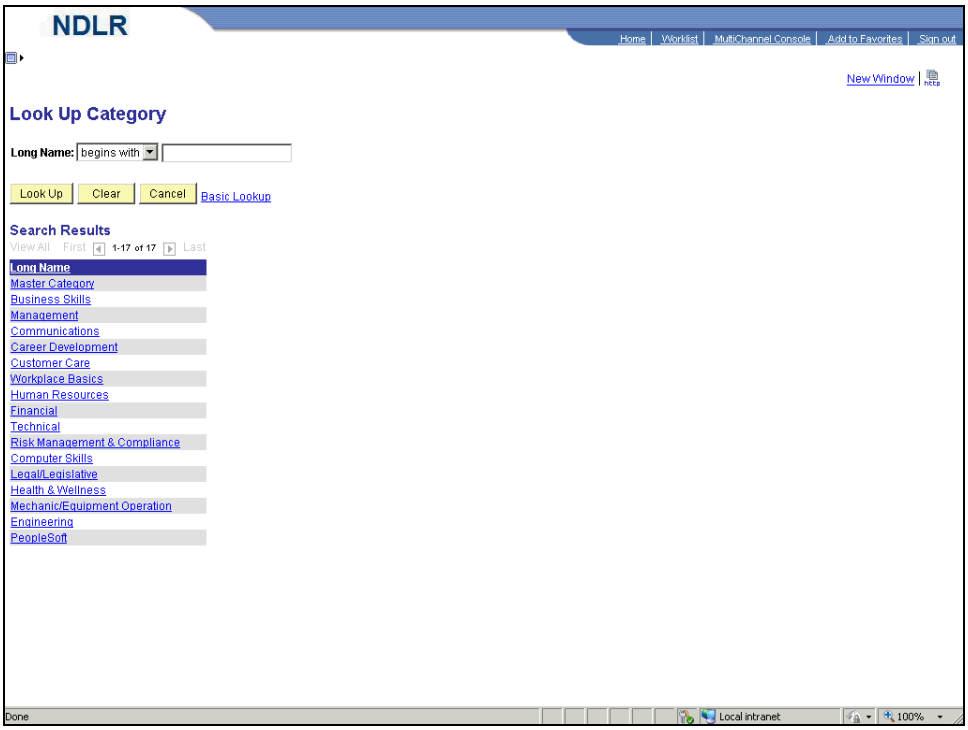
Step	Action
45.	Select the "**OMB Learner Group 1**" list item.
46.	The **Relationship** field is used to specify how a specific learner group is related to others in the list when used to determine whether or not a group has access. Selecting the "And" value from the drop-down list means a learner must be a member of the selected learner group and the one that follows in the list. Selecting the "Or' value from the drop-down list means a learner must be in either the selected learner group or the learner group next in the list.



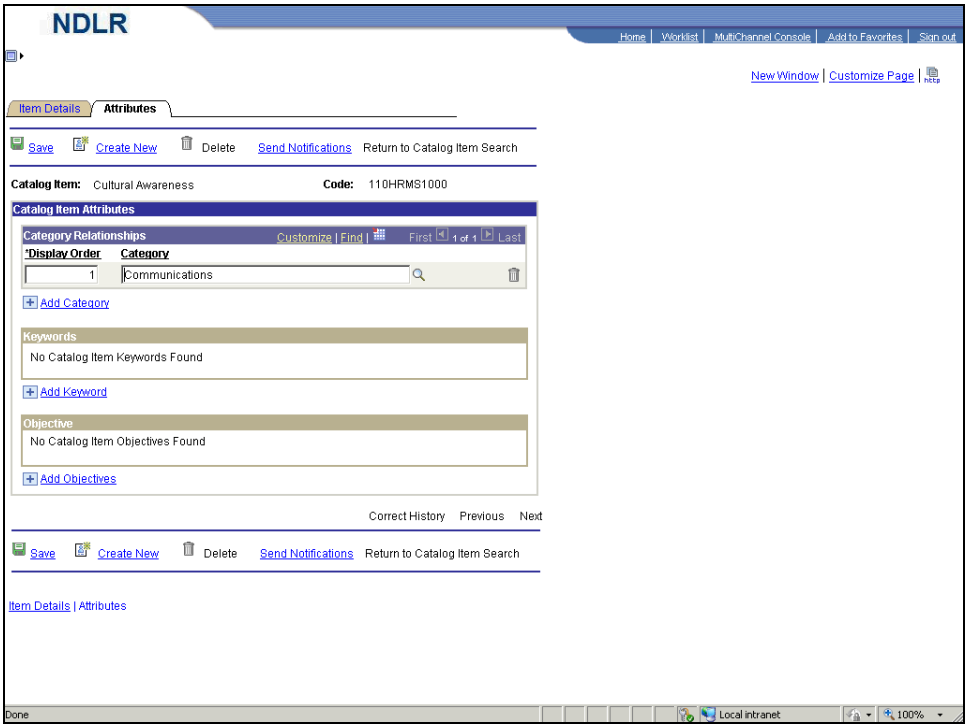
Step	Action
47.	Click the **Done** button. Done
48.	Click the **Attributes** tab. Attributes
49.	Use the **Attributes** page to associate categories and objectives with a catalog item.



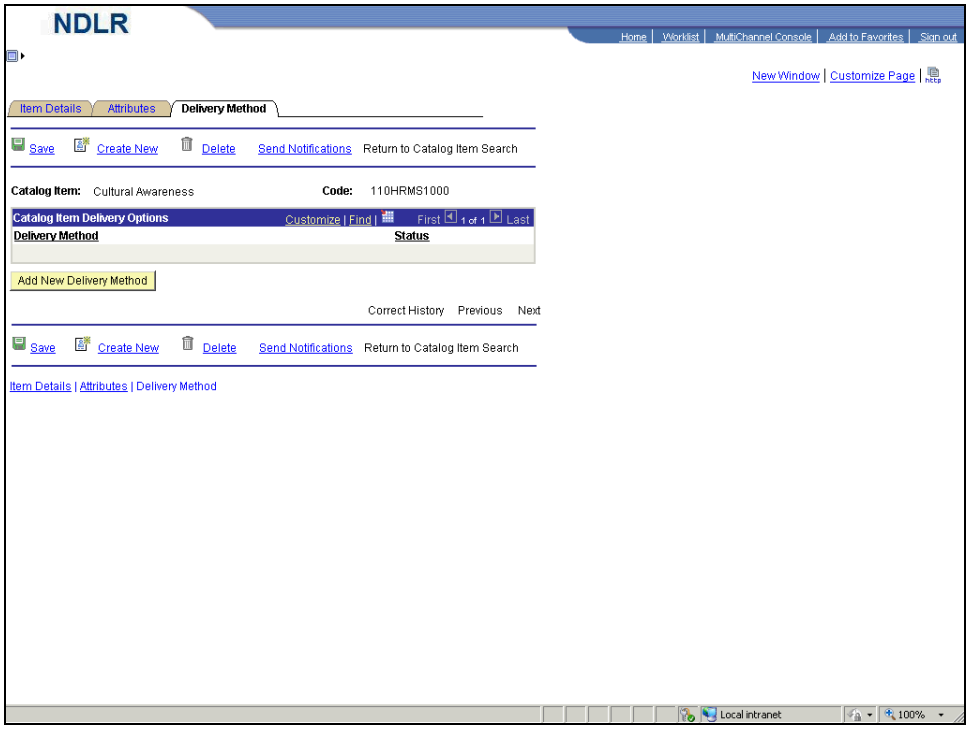
Step	Action
50.	Click the **Add Category** link. Add Category
51.	The **Display Order** field specifies the relative order in which a catalog item is to appear within the selected category. Assigning the same number to more than one item does not prevent those items from being displayed, but the order will be unpredictable.
52.	Click in the **Display Order** field.
53.	Enter the desired information into the **Display Order** field. Enter "**1**".
54.	The **Category** field defines the category an item belongs to. When Learners search the catalog by the Communication category, only items belonging to this category will display.
55.	Click the **Category Lookup** button.



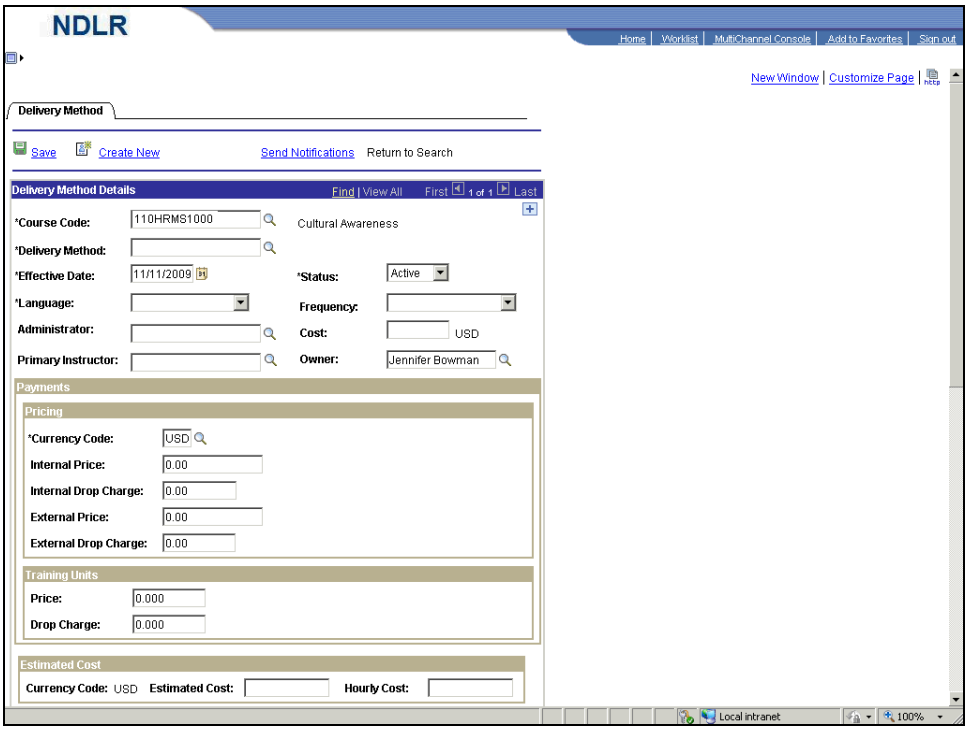
Step	Action
56.	Select the "**Communications**" list item. Communications



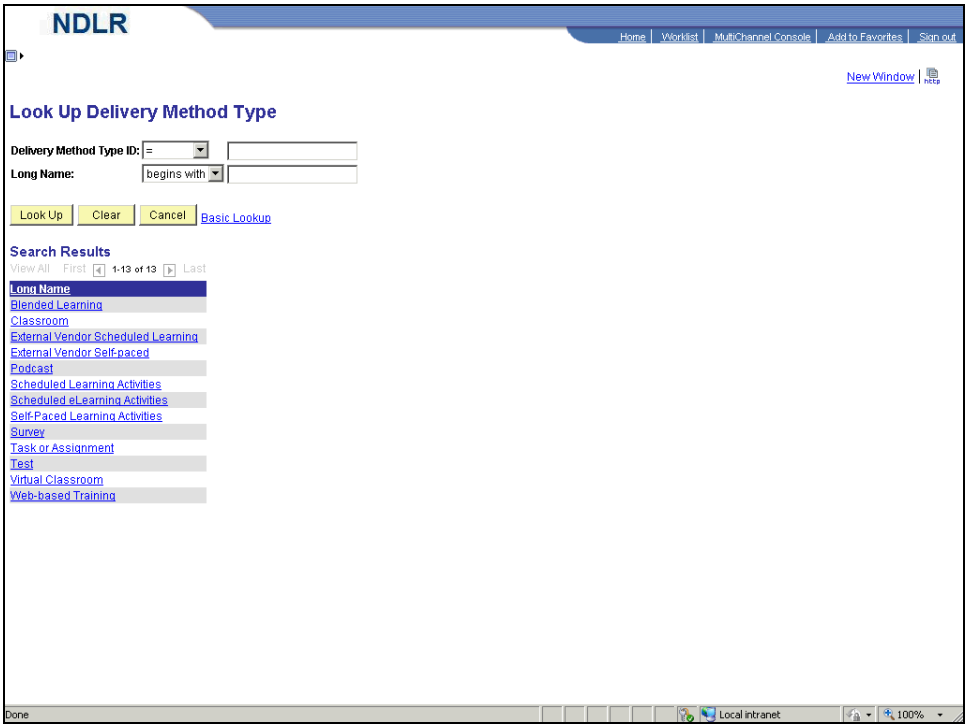
Step	Action
57.	Click the **Save** link. Save
58.	Click the **Delivery Method** tab. Delivery Method



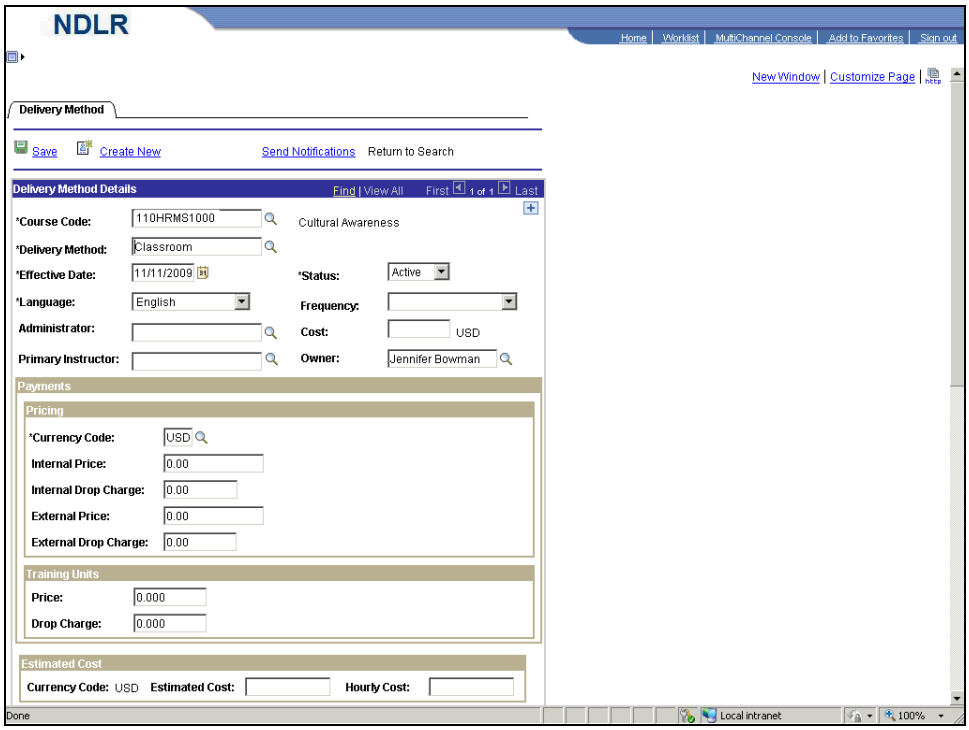
Step	Action
59.	Click the **Add New Delivery Method** button. Add New Delivery Method



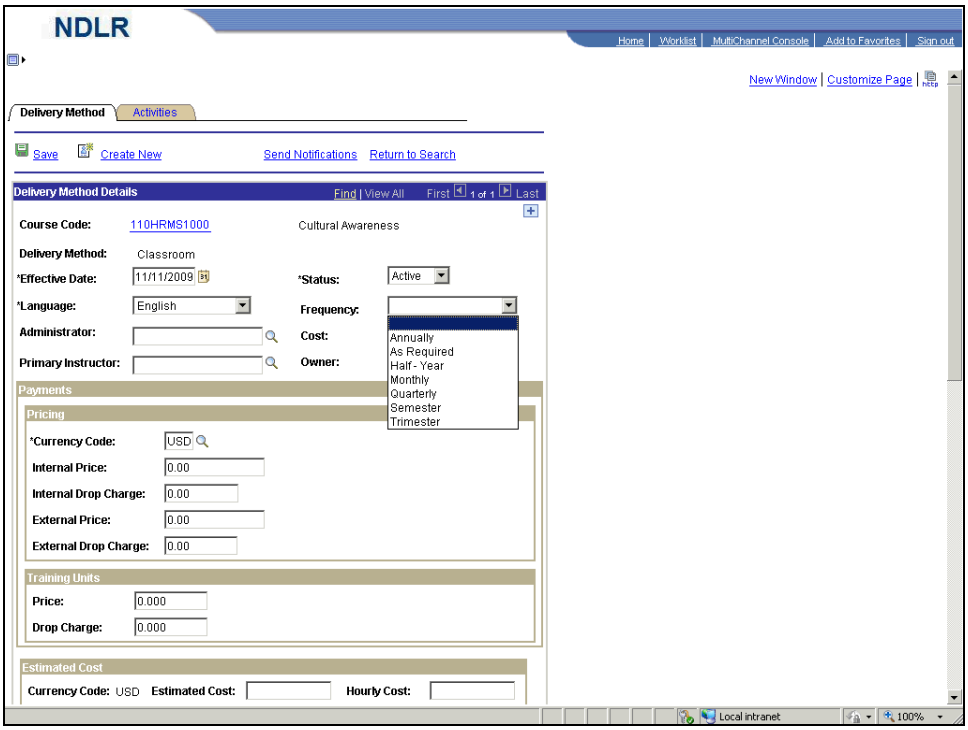
Step	Action
60.	Click the **Delivery Method Lookup** button.



Step	Action
61.	Select the "**Classroom**" list item. Classroom
62.	Use the **Effective Date** to define when the delivery method will become available for the specific catalog item. For this activity, accept the default value.
63.	Use the **Status** field to define whether the delivery method is active or inactive.
64.	The **Language** field defines which language is available for the delivery method selected. If there are multiple languages, a delivery method for each language and each method should be created. For this example, retain the default value.
65.	The **Frequency** field defines how often this catalog item is available with the delivery method selected.



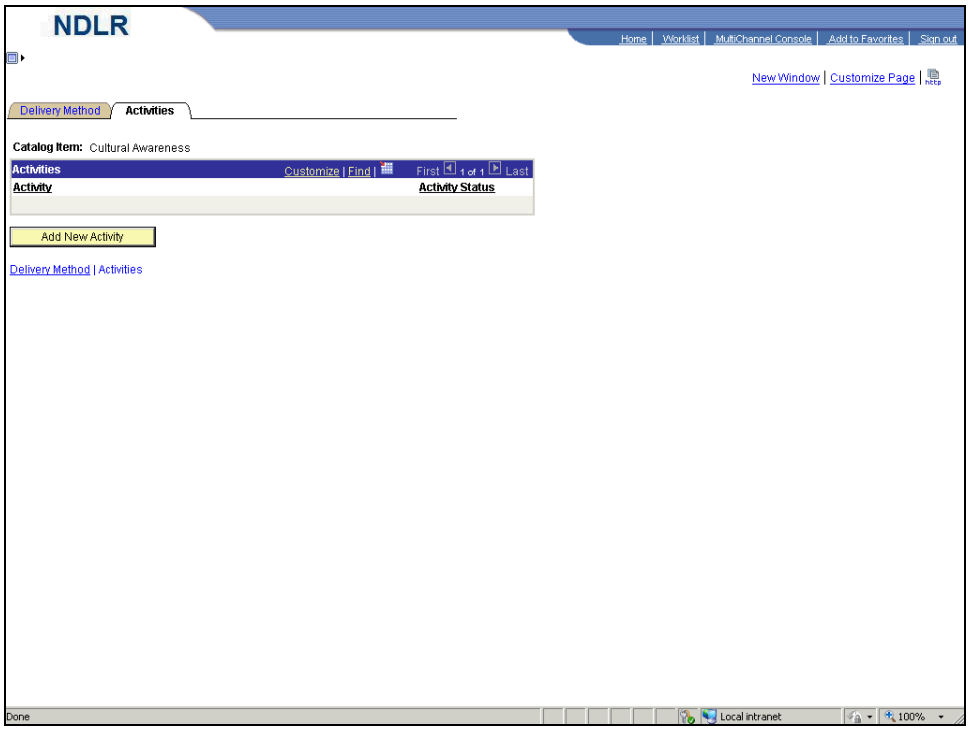
Step	Action
66.	Click the **Frequency** list.



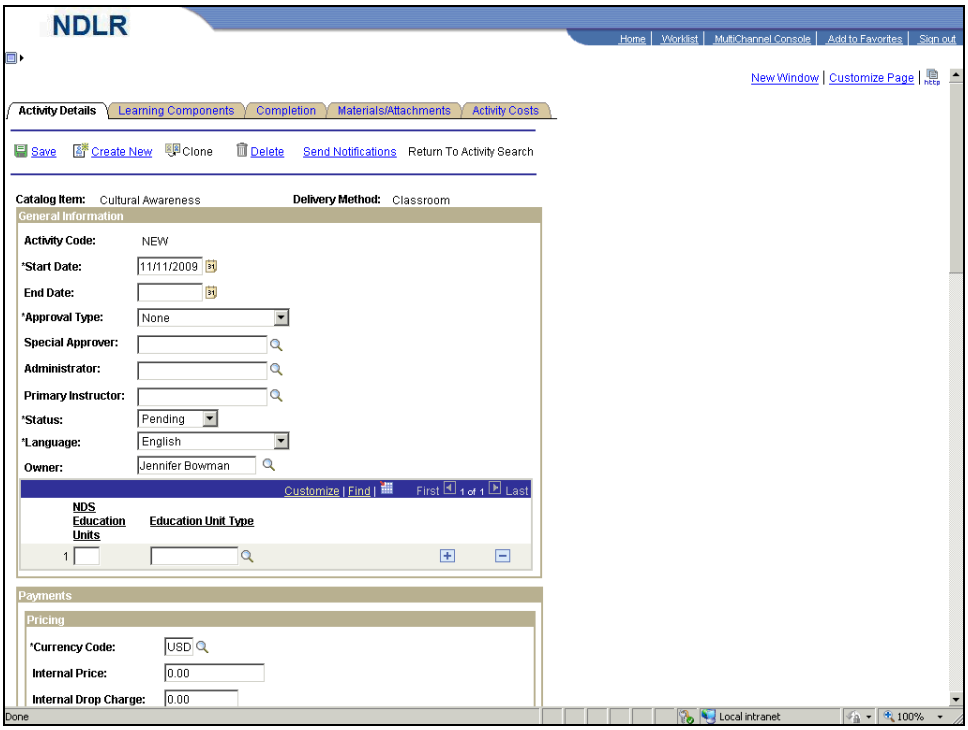
Step	Action
67.	Select the "**Quarterly**" list item. Quarterly
68.	The **Cost** field defines the internal cost to deliver this course with the delivery method selected.

Step	Action
69.	Click in the **External Price** field. 0.00
70.	Press **[Delete]**.
71.	Enter the desired information into the **External Price** field. Enter "**50.00**".
72.	Click in the **External Drop Charge** field. 0.00
73.	Press **[Delete]**.
74.	Enter the desired information into the **External Drop Charge** field. Enter "**25.00**".
75.	Click the scrollbar.
76.	Click in the **Max Enrollment** field.
77.	Enter the desired information into the **Max Enrollment** field. Enter "**25**".
78.	Click in the **Min Enrollment** field.

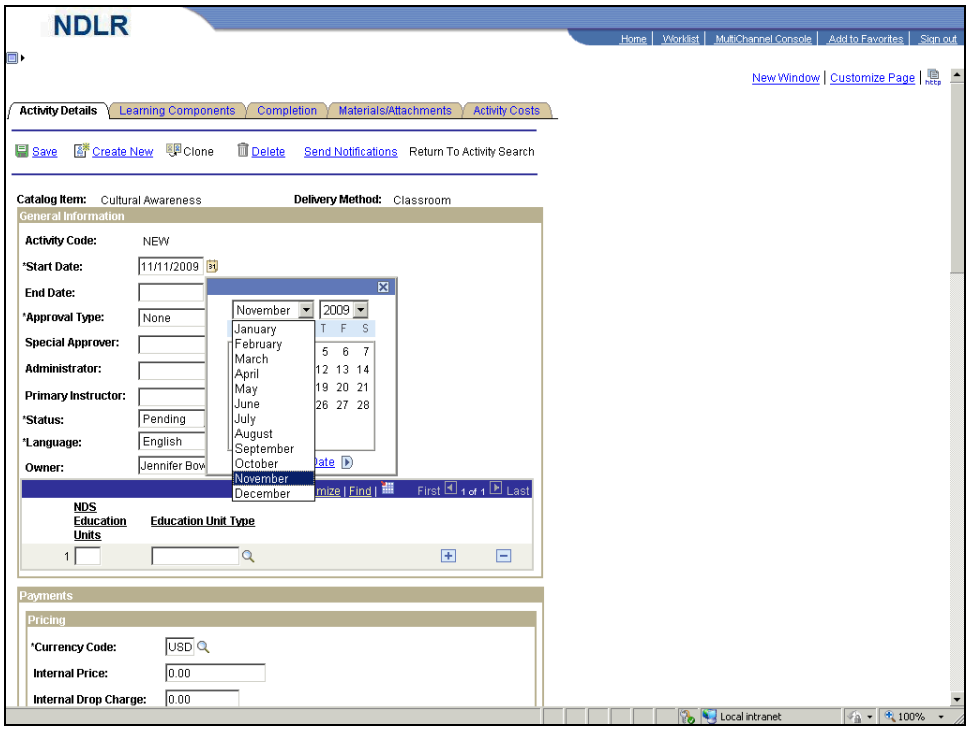
Step	Action
79.	Enter the desired information into the **Min Enrollment** field. Enter "**5**".
80.	Click the **Enforce Enrollment Limit** option.
81.	Click the **Enable Waitlist** option.
82.	Click in the **Waitlist Capacity** field.
83.	Enter the desired information into the **Waitlist Capacity** field. Enter "**10**".
84.	The **Waitlist Threshold** field is used to enter a number that when reached will notify the administrator that the class size may need to be increased or a new class may need to be created.
85.	Click in the **Waitlist Threshold** field.
86.	Enter the desired information into the **Waitlist Threshold** field. Enter "**5**".
87.	Click the scrollbar.
88.	Click the **Save** link. Save
89.	Click the scrollbar.
90.	Click the **Activities** tab. Activities



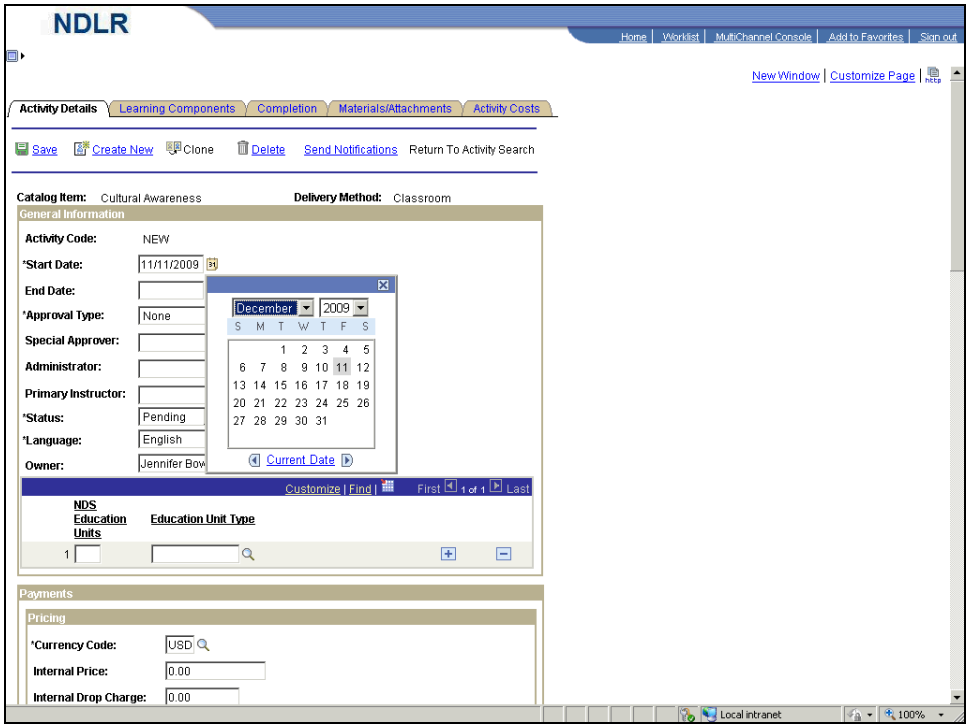
Step	Action
91.	Click the **Add New Activity** button. Add New Activity
92.	The **Activity Details** page defines the general and pricing information for activities. Most of the fields are populated from the catalog item details that were previously entered. These defaults can be modified for individual activities.
93.	The information on the **Activity Details** page will override any information that was entered on the **Delivery Methods** page. This page should be used as the main page of reference for these fields.
94.	Each activity has a unique **Activity Code** that will be visible to all Learners. The Activity Code will display as NEW until the activity has been saved in the system. Once the activity has been saved, the system will automatically assign the activity an **Activity Code**.
95.	The **Start Date** field indicates the first day of the activity. The Start Date can trigger notifications, such as activity start reminders, to enrolled students. You can also use the **Start Date** field to control access to third party vendor content that should not be made available before a certain date.



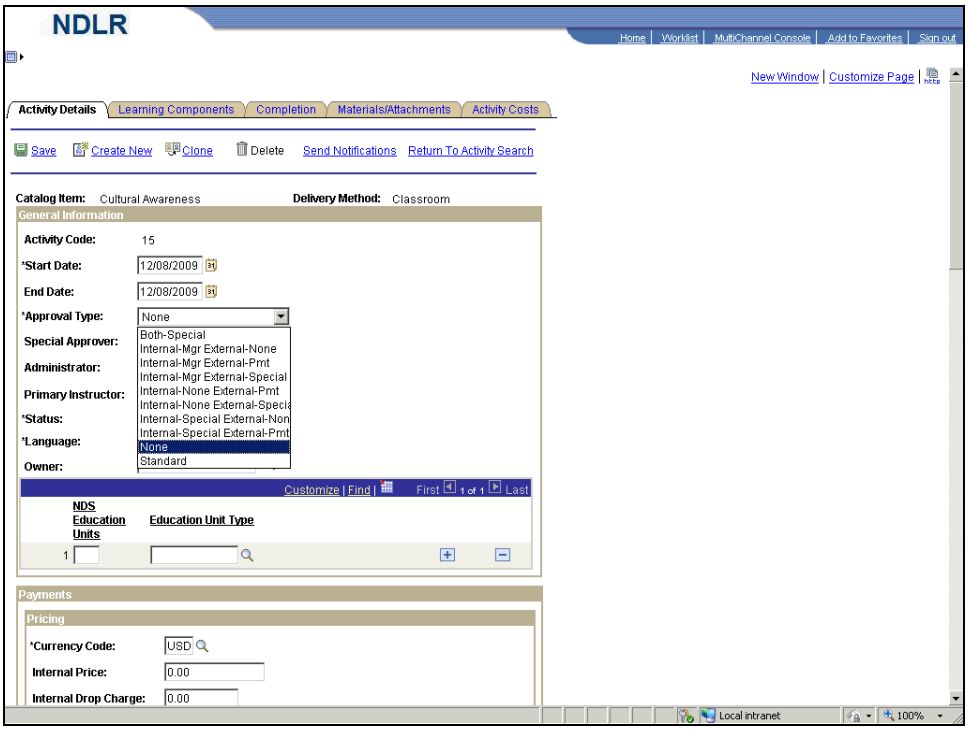
Step	Action
96.	Click the **Choose a date** button.
97.	Click the **Calendar Month** list.



Step	Action
98.	Select the "**December**" list item. December

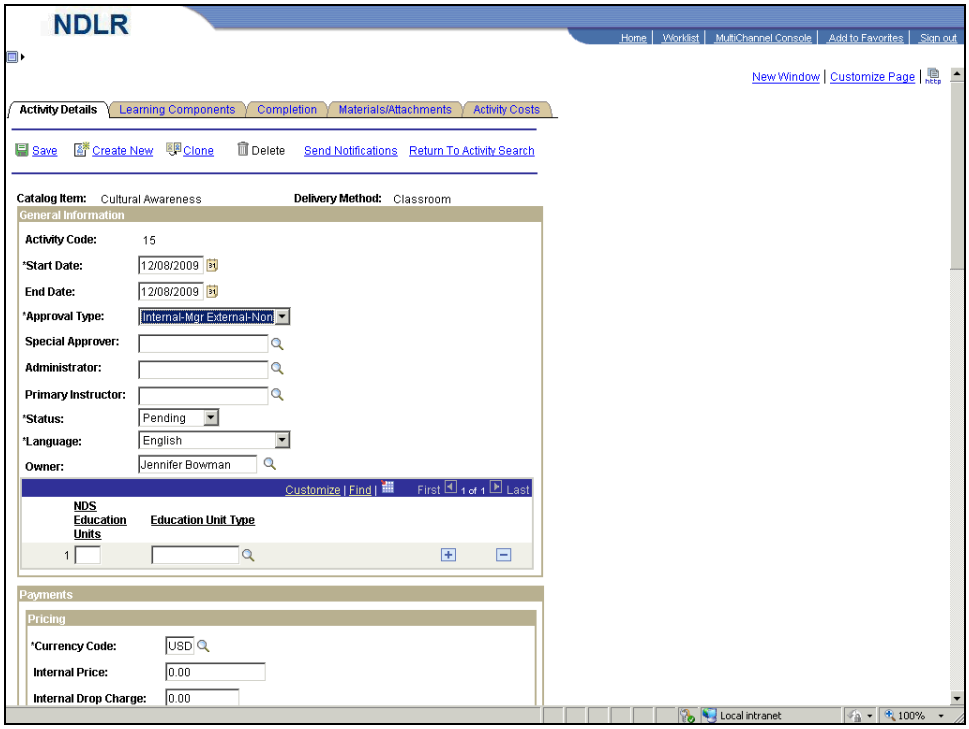


Step	Action
99.	Click the **8** link. 8
100.	The **End Date** field indicates the last day of the activity. **Note**: For self-paced activities that will be available indefinitely, the **End Date** field should be left blank.
101.	Click in the **End Date** field.
102.	Enter the desired information into the **End Date** field. Enter "**12/08/2009**".
103.	Use the **Approval Type** field to indicate the level of approval the Learner needs in order to enroll in an activity.
104.	Click the **Approval Type** drop-down list.



Step	Action
105.	Select the "**Internal-Mgr External-None**" list item. Internal-Mgr External-None

Step	Action
106.	**Internal** refers to State Learners. **External** refers to Non-State Learners.
107.	The **Status** field displays the current status of the activity. When all of the components of an activity are defined, you can change the status from Pending to Active. When you change the status of an activity, the system will automatically rebuild the catalog index twice a day. For this example, retain the default value.



Step	Action
108.	Click in the **NDS Education Units** field.
109.	Enter the desired information into the **NDS Education Units** field. Enter "**60**".
110.	Click in the **Education Unit Type** field.
111.	Enter the desired information into the **Education Unit Type** field. Enter "**MEU**".

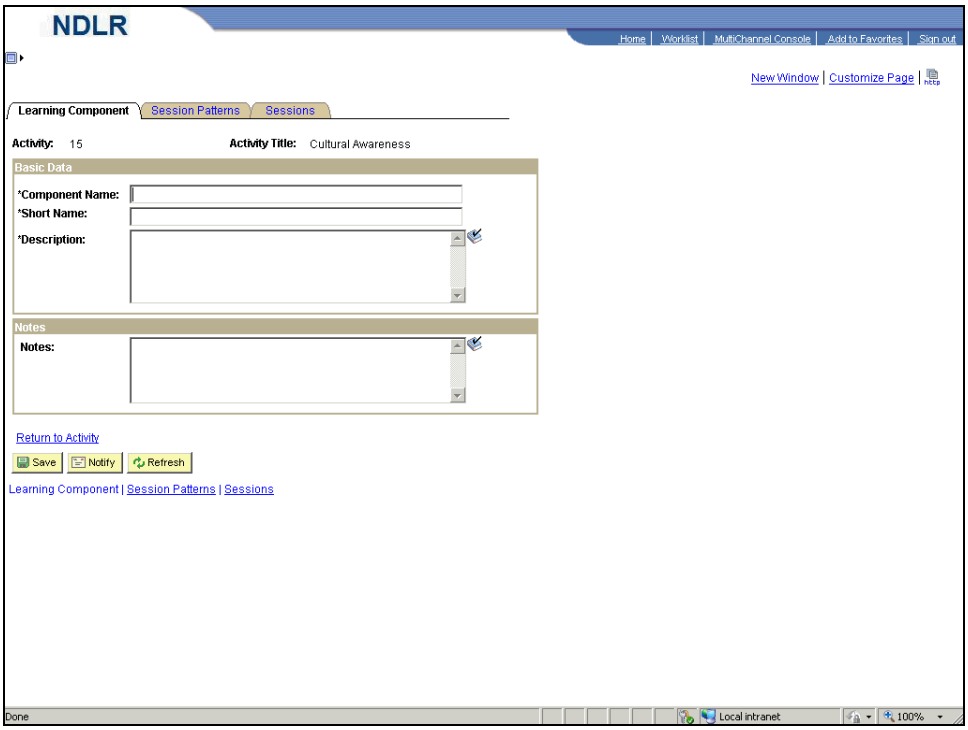
Step	Action
112.	The **Payments - Pricing** section is where you will designate the Price for Internal Learners, External Learners as well as any appropriate drop charges.
113.	Click the scrollbar.
114.	**Training Units** are prepaid units that external organizations can purchase at a discounted price. They enable you to presell training that learners can use at a later date. The system depletes training units from the prepaid account each time a learner from the customer organization uses the account to pay for enrollment, registration or drop fees. **Note**: Training Units are not being used at this time.
115.	**Learning Periods** are useful for learning activities that contain web-based, test or survey learning components. The number of days after the start or enrollment date (whichever is greater) that learners have to complete the activity is what should be entered in this field.
116.	For the **Days, Hours and Minutes**: Enter an estimate of how long the activity will take. This should be the total of the duration of the learning components that make up this activity, plus any other time you think it might take the learner to complete. The activity duration you enter here appears on the Activity Details and Activity Progress pages. 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. **Display Start and End Date**: Select this option if you want to display the activity start and end date to learners. The default for this field is set to selected/checked.
117.	The **Start Reminder** section is used to: identify the number of days before the start of an activity and/or identify the date you want to send a reminder to enrolled learners before the start of an activity.
118.	**Max Enrollment** (maximum enrollment**)**: Enter the maximum number of learners you want to enroll in an activity. When this number has been reached, the system closes the activity to further enrollment unless overbooking is permitted, in which case the system continues to enroll learners up to the user specified overbook percentage.
119.	**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.
120.	**Total Open Enrollment**: The system displays the total amount of seats that are currently available for open enrollment.
121.	**Min Enrollment** (minimum enrollment): Enter the minimum number of learners you want to be enrolled in the activity.
122.	**Min Enroll Days** (minimum enrollment days): Enter the number of days before the activity start date that you want the minimum enrollment notification sent to the enrollment administrator and activity owner to alert them that the minimum enrollment has not been reached.

Step	Action
123.	Click the scrollbar.
124.	**Overbook**: Enter the percentage above the maximum enrollment value that you 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 who tries to enroll in this activity
125.	**Reserved Seats**: Enter the number of seats you want available in reserve. Only a Training Administrator can enroll learners into reserved seats. use reserved seats to reserve seats for groups of learners without naming specific learners.
126.	**Last Enroll** (last enrollment): Enter the number of days Before the Start Date or After the Start Date to indicate the last day enrollment is permitted. This is useful, for instance, when you want to close enrollment to accommodate the ordering of materials for the activity.
127.	**Last Enroll Date**: Enter a date that represents the last day on which enrollment into this activity is permitted. Alternatively, you can specify how many days before or after the activity start date learners can enroll in the Last Enroll field or you can set the Last enroll Date at the Activity Start Date by selecting the Last Enroll Date = Start Date check box.
128.	**Last Enroll Date = Start Date**: Select this option if you want the last day learners can enroll in an activity to equal the Activity Start Date.
129.	**Enforce Enrollment Limit**: Select this option to prevent learners from enrolling in an activity when the maximum enrollment number plus the overbook percentage is reached. You must select this check box in order for the system to generate a waitlist for the activity.
130.	**Restrict to Programs**: Select this option if you want an activity to only be available to a learner who is enrolled in programs that requires the activity for completion. Administrators can enroll learners in activities that are restricted to programs by using the Enroll Learners component.
131.	**Enable Waitlist**: Select this option if you want the system to accept waitlisted learners for an activity when the maximum enrollment number has been reached. If overbooking is permitted, the system does not waitlist learners until the overbook percentage has been reached.
132.	**Waitlist Capacity**: Enter the maximum number of learners that the system can place on the waitlist.
133.	**Waitlist Total**: Displays the number of learners on the waitlist. The enrollment process increases or decreases this number as learners are added to or removed from the waitlist
134.	**Waitlist Threshold**: Enter the number of learners on the waitlist that will trigger a notification to the Administrator.
135.	**Last Drop**: Enter the number of days Before the Start Date or After the Enrollment Date that a Learner can drop an activity without paying the drop fee. Alternatively, you can enter a specific date in the **Last Drop Date** field.
136.	**Last Drop Date**: Enter the date a Learner can drop an activity without paying the drop fee.

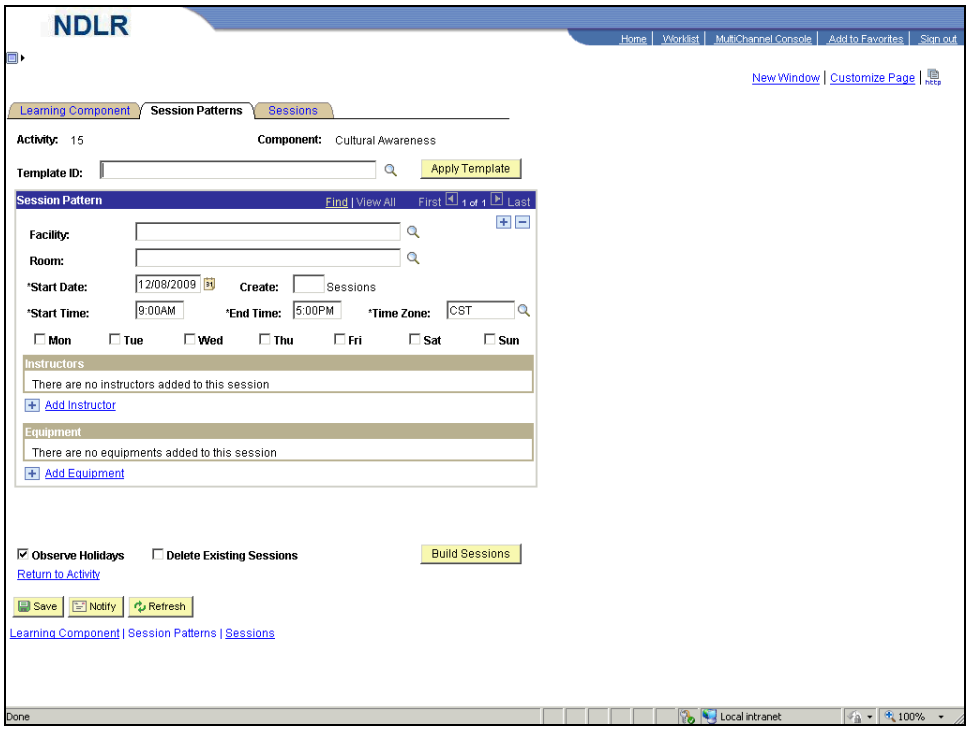
Step	Action
137.	**Last Drop Date = Start Date**: Select if you want the last day learners can drop an activity without having to pay a drop fee that equals the activity start date.
138.	The information in the **Grades and Attendance** section are set through defaults and should not be modified.
139.	Click the scrollbar.
140.	Click the **Default Learner Groups** button. Default Learner Groups
141.	**Note**: Learner Groups that are identified here will have access to view this specific activity.
142.	Notice the **Learner Group** has been populated.
143.	Click the scrollbar.
144.	Click the **Learning Components** tab. Learning Components
145.	**Learning Components** are the building blocks of learning activities. Each activity must include at least one learning component. When adding a learning component to an activity, the administrator must first select a component type. The selected type determines what information must be defined for the learning component and how the system will track learner progress for that component.

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

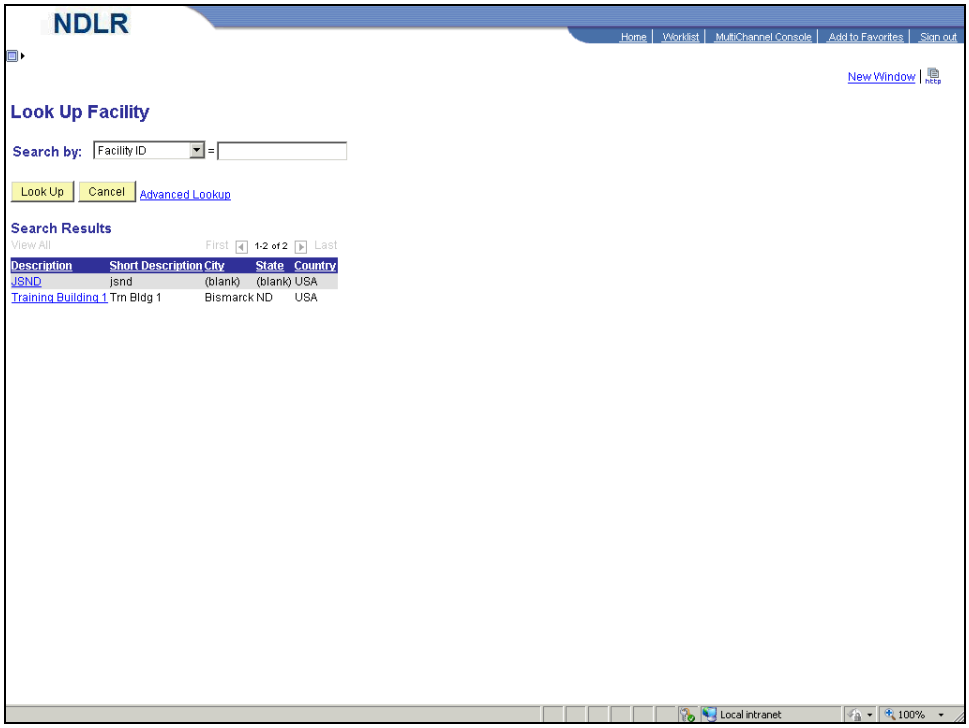
Step	Action
147.	Click the **Sessions** link.
148.	Use the **Component Name** field to enter a descriptive title for the component. The component name appears on the **Activity Details** page.



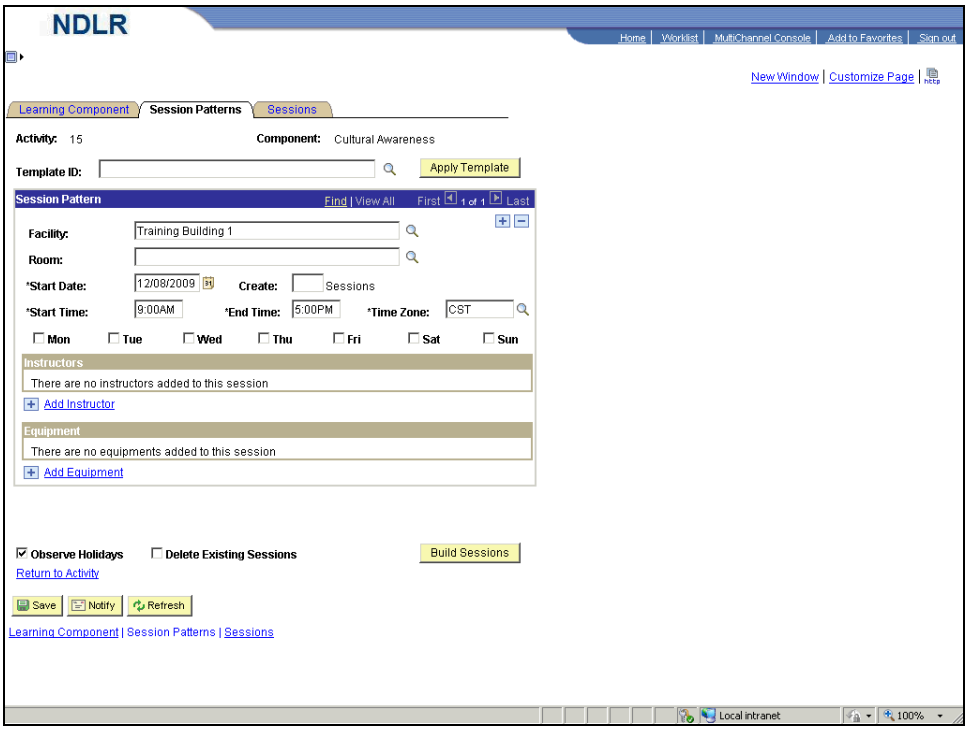
Step	Action
149.	Enter the desired information into the **Component Name** field. Enter "**Cultural Awareness**".
150.	Click in the **Short Name** field.
151.	Enter the desired information into the **Short Name** field. Enter "**Cultural A**".
152.	Click in the **Description** field.
153.	Enter the desired information into the **Description** field. Enter "**Cultural Awareness**".
154.	Click the **Session Patterns** tab. Session Patterns
155.	Use the **Session Patterns** page to create session patterns. You can base session patterns on a previously defined session template. You use session patterns to generate actual sessions when the session has a repeating pattern.



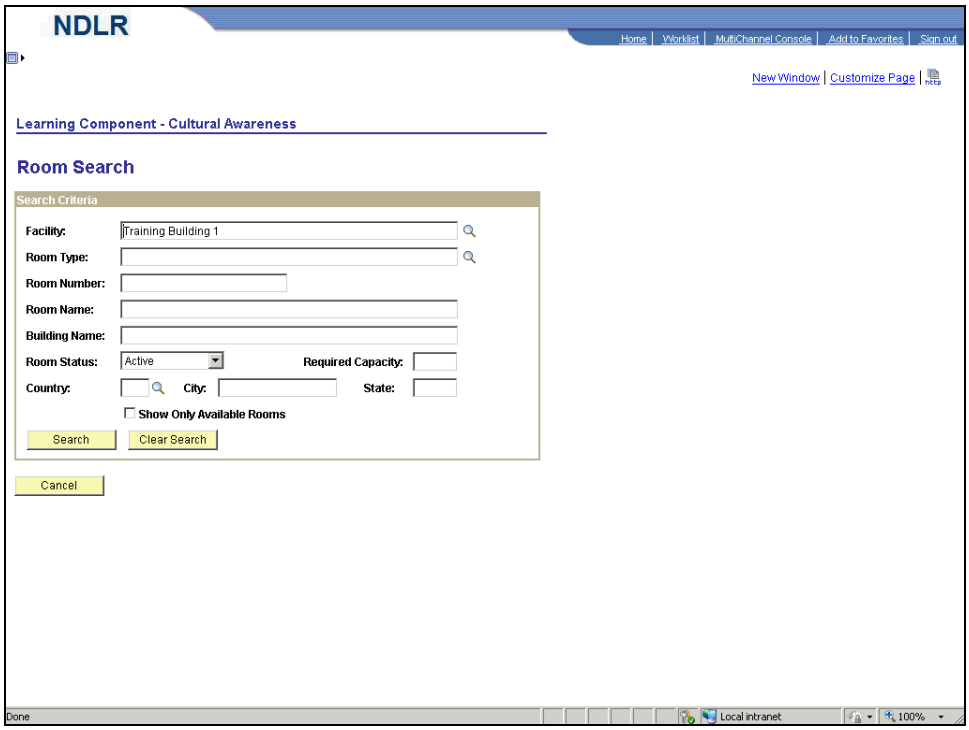
Step	Action
156.	Click the **Facility Lookup** button.



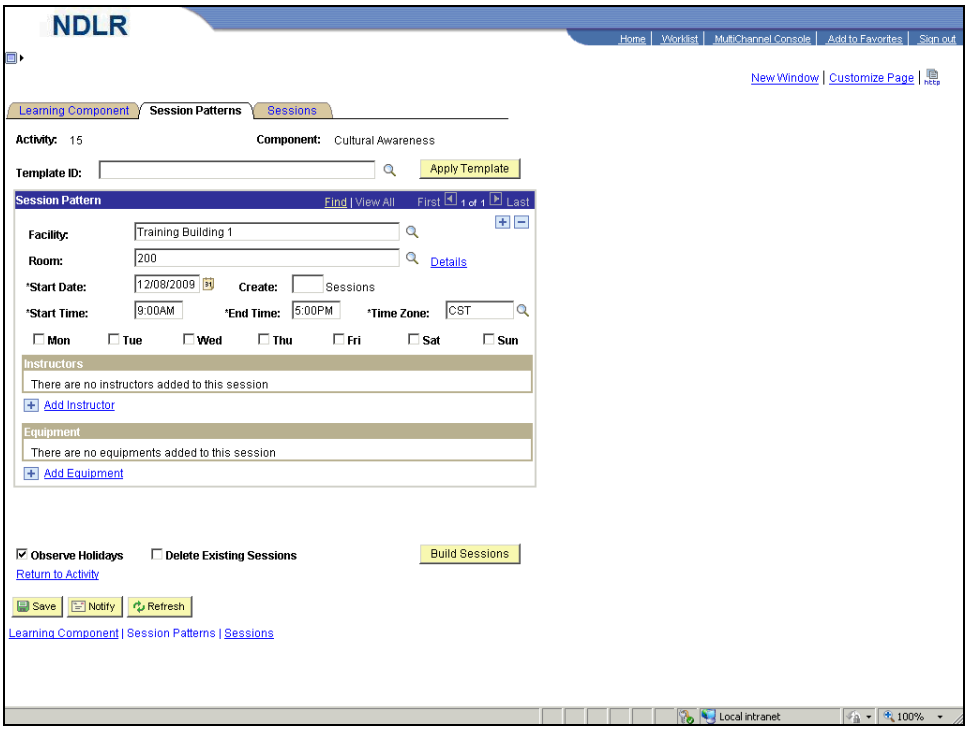
Step	Action
157.	Select the "**Training Building 1**" list item.



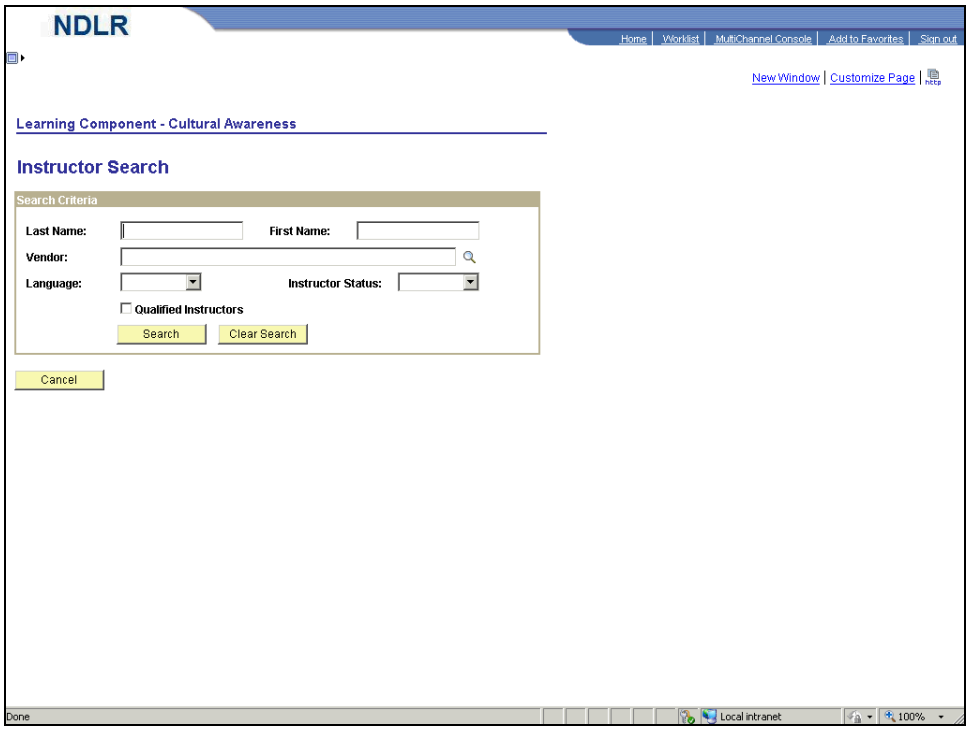
Step	Action
158.	Click the **Room Lookup** button.



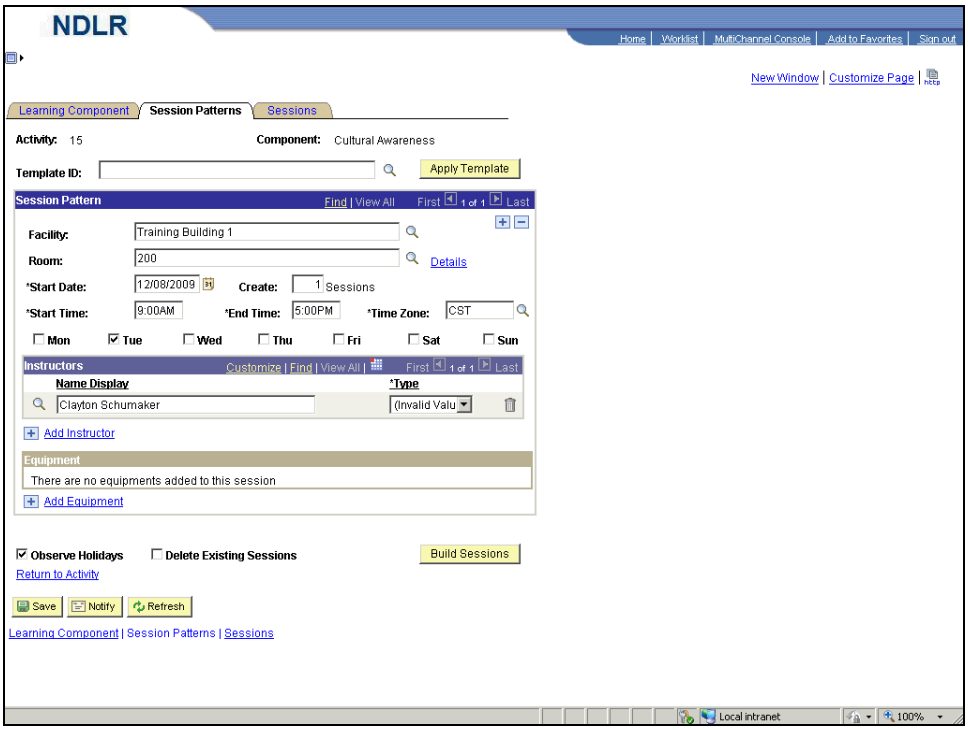
Step	Action
159.	Click the **Search** button. Search
160.	Click the "**200**" link. 200
161.	The **Create Sessions** field reflects a 24 hour period. For example, if an activity lasts three days, you would enter **3** in the **Create Sessions** field.



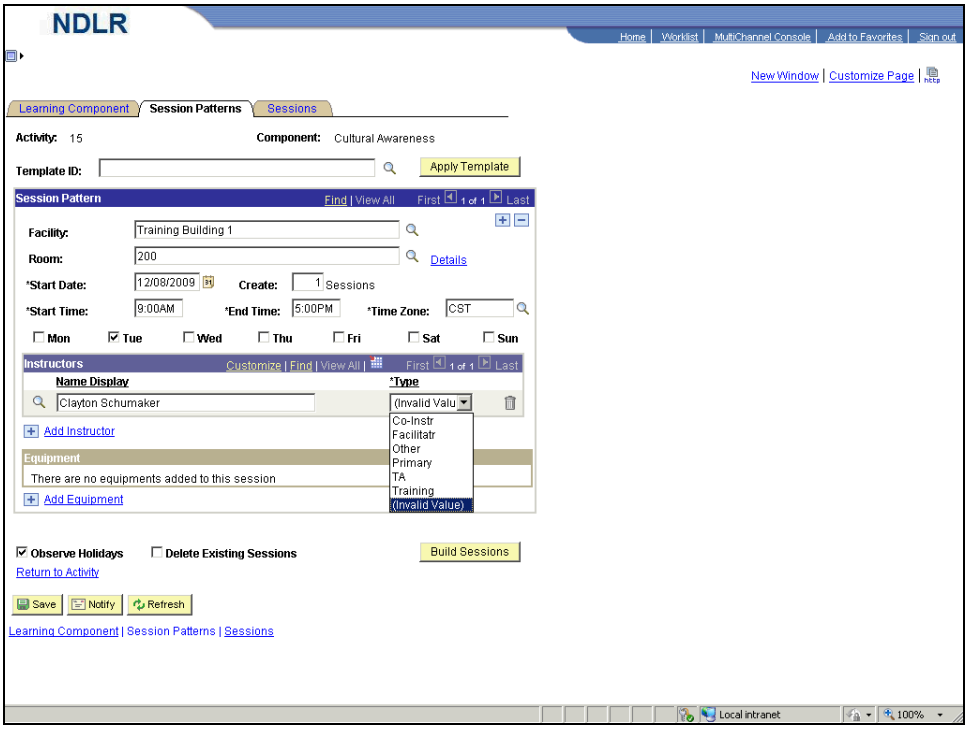
Step	Action
162.	Click in the **Create** field.
163.	Enter the desired information into the **Create** field. Enter "**1**".
164.	**Note**: It is recommended that you make sure the day selected corresponds with the **Start Date**.
165.	Click the **Tue** option.
166.	Click the **Add Instructor** link. Add Instructor
167.	Click the **Instructors Lookup** button.



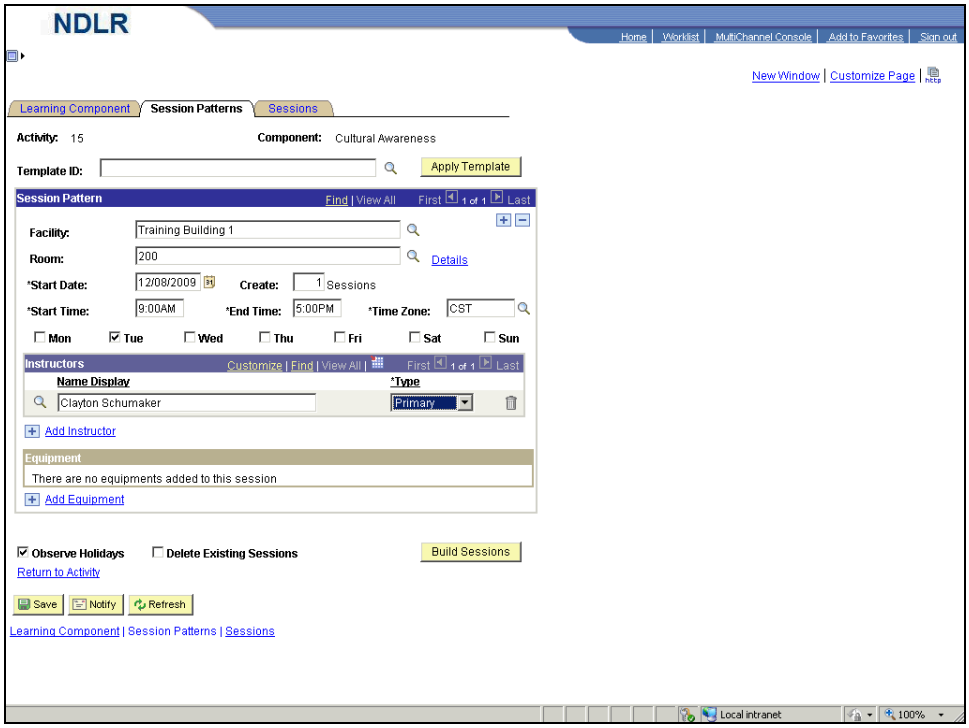
Step	Action
168.	Enter the desired information into the **Last Name** field. Enter "**Schumaker**".
169.	Click the **Search** button. Search
170.	Click the "**Clayton Schumaker**" link. Clayton Schumaker



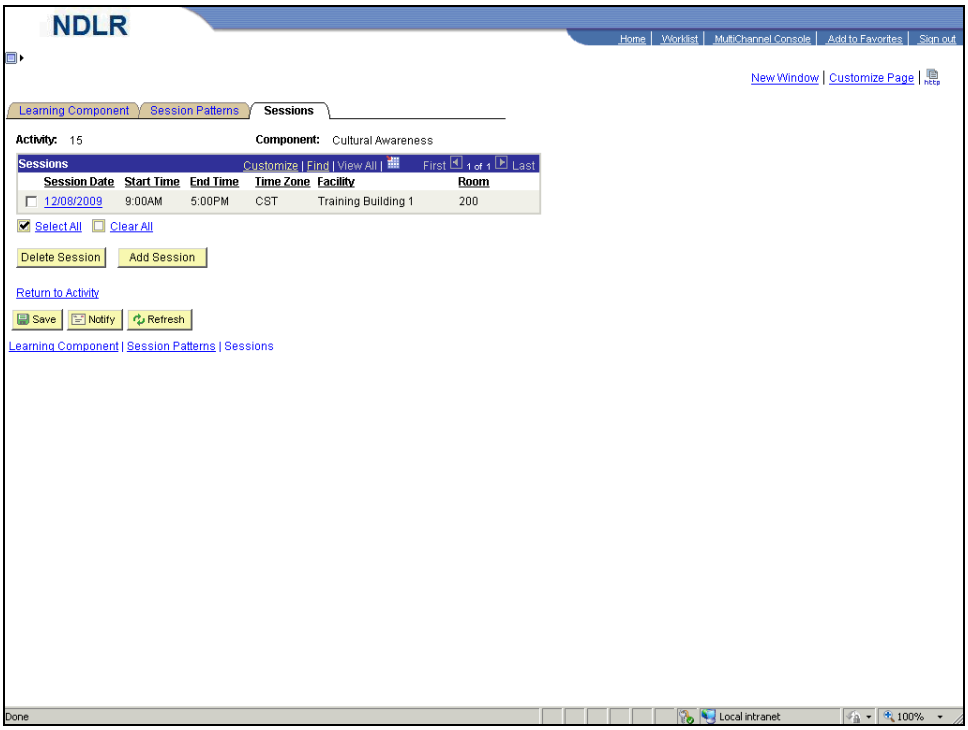
Step	Action
171.	Click the **Type** drop-down list.

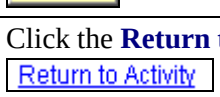


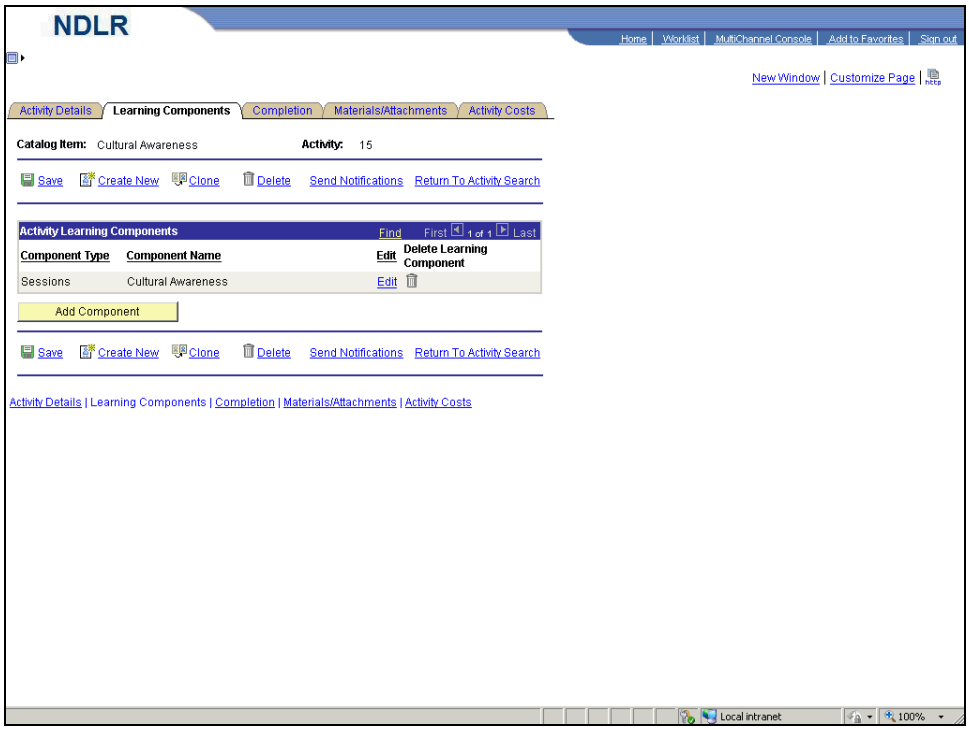
Step	Action
172.	Select the "**Primary**" list item. Primary



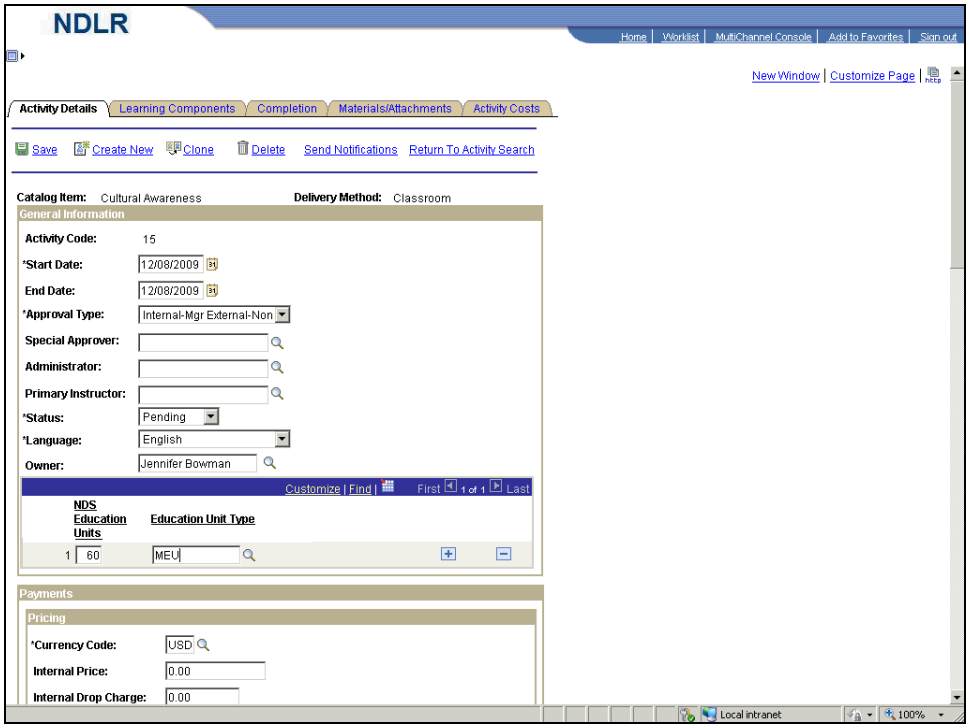
Step	Action
173.	Click the **Build Sessions** button. Build Sessions



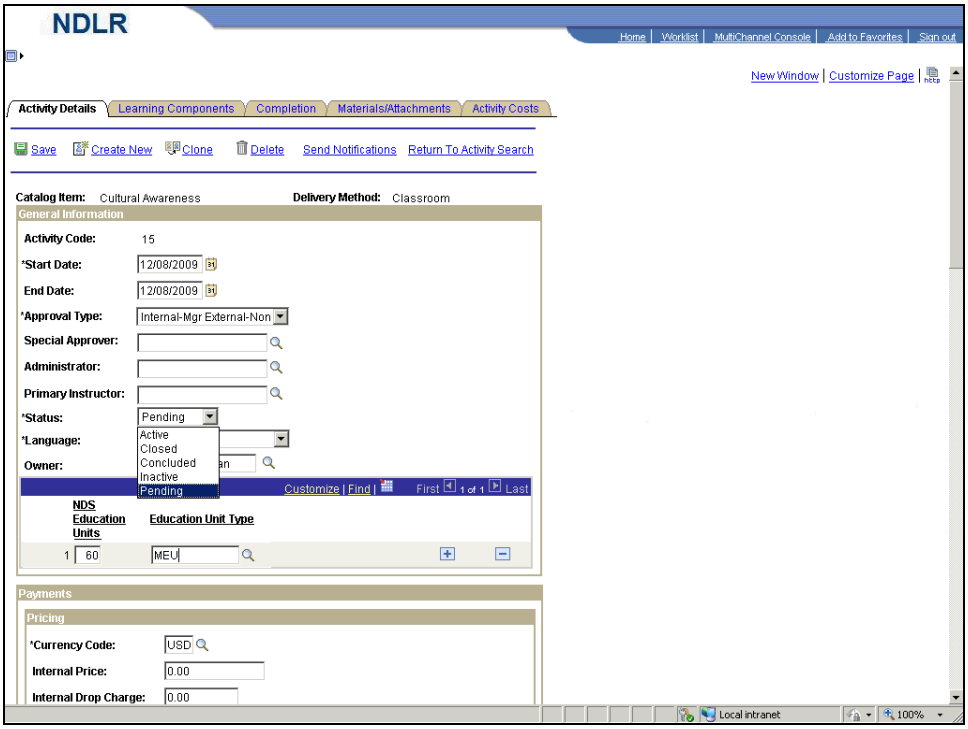
Step	Action
174.	Click the **Save** button.
175.	Click the **Return to Activity** link. 



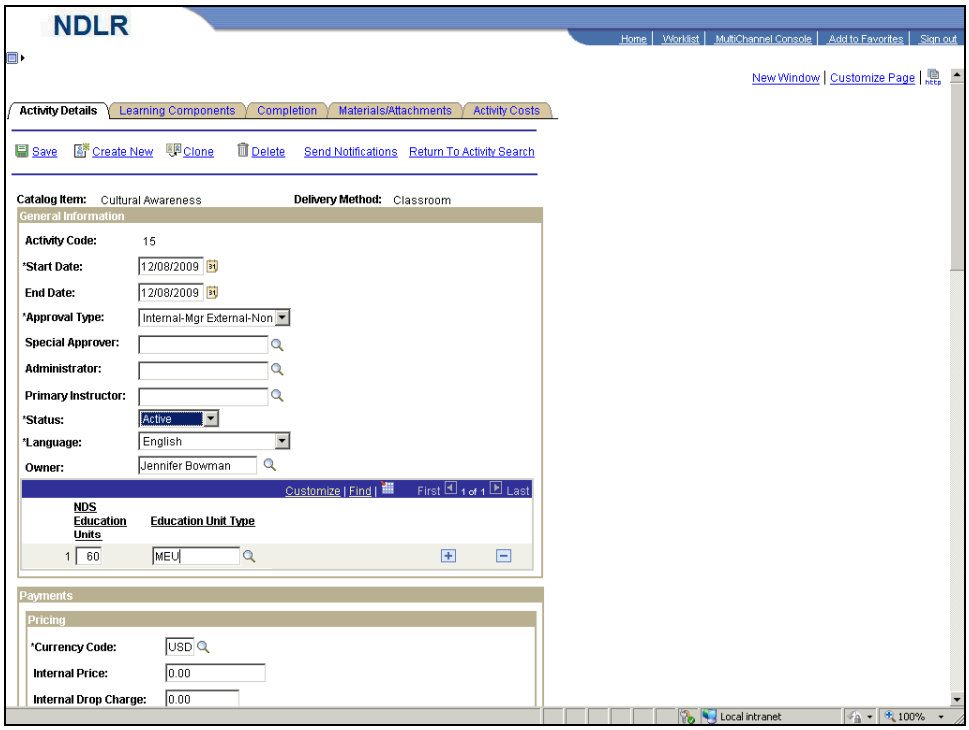
Step	Action
176.	Click the **Activity Details** tab. Activity Details



Step	Action
177.	Click the **Status** drop-down list.



Step	Action
178.	Select the "**Active**" list item.



Step	Action
179.	Click the **Save** link. Save
180.	**Congratulations**! You should now be able to: - Navigate to the **Item Details** page. - Create a catalog entry. **End of Procedure.**

5.2 Cloning an Activity

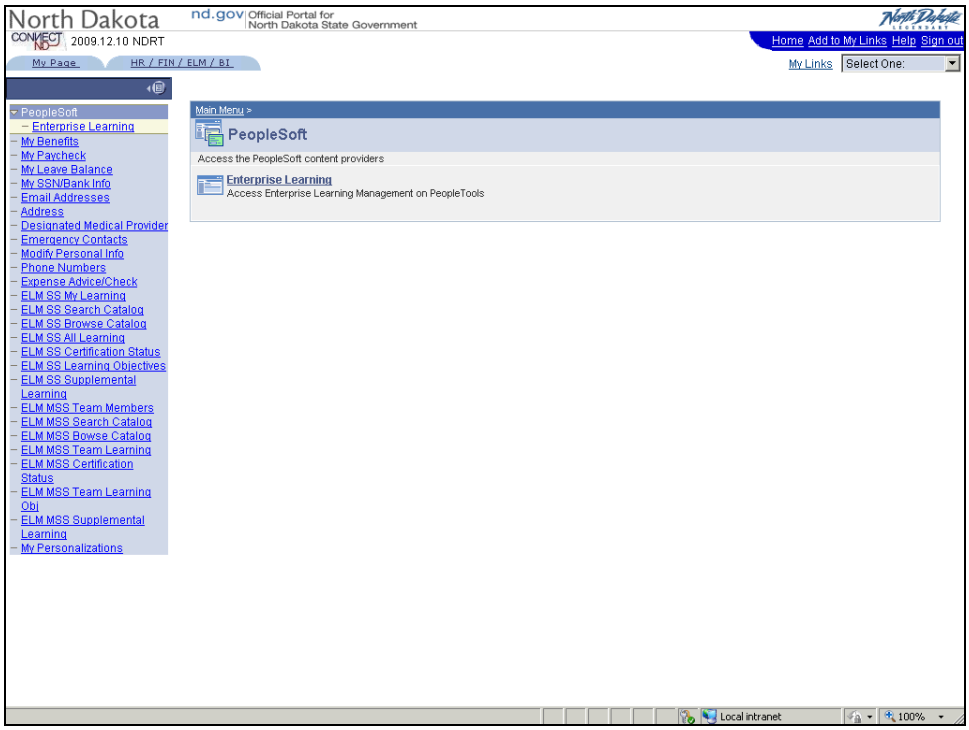
Cloning an Activity consists of recreating an existing activity and changing specific details in order to create a separate Activity.

Procedure

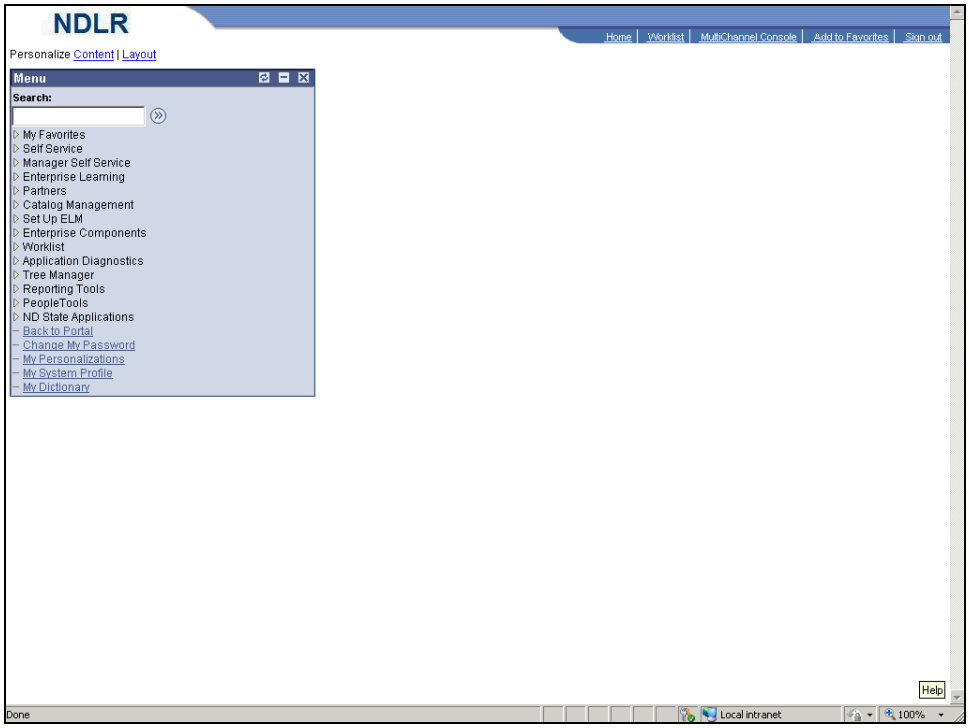
By the end of this topic, you will be able to:

- Navigate to the **Activity Details** page.
- Clone an activity.

Step	Action
1.	Begin by navigating to the **Maintain Activities** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

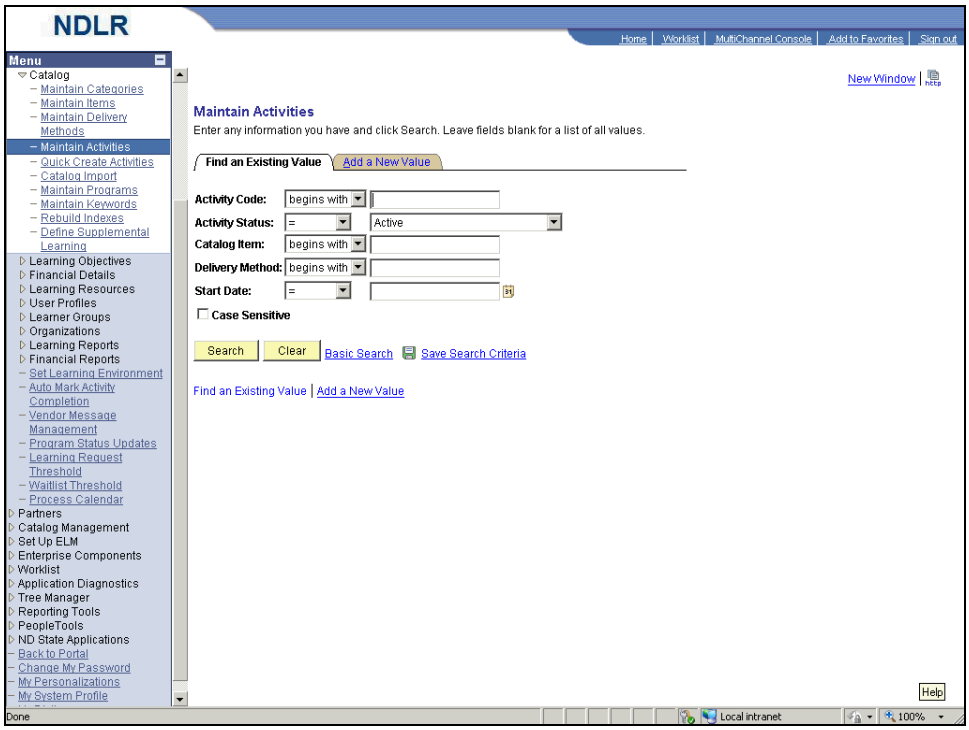


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

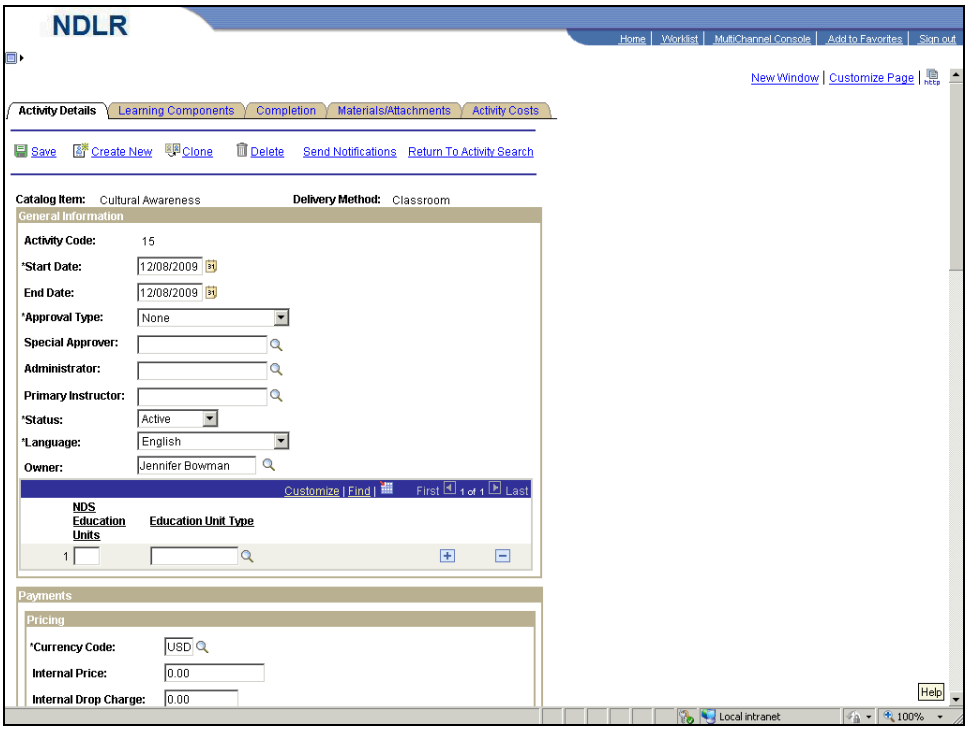


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

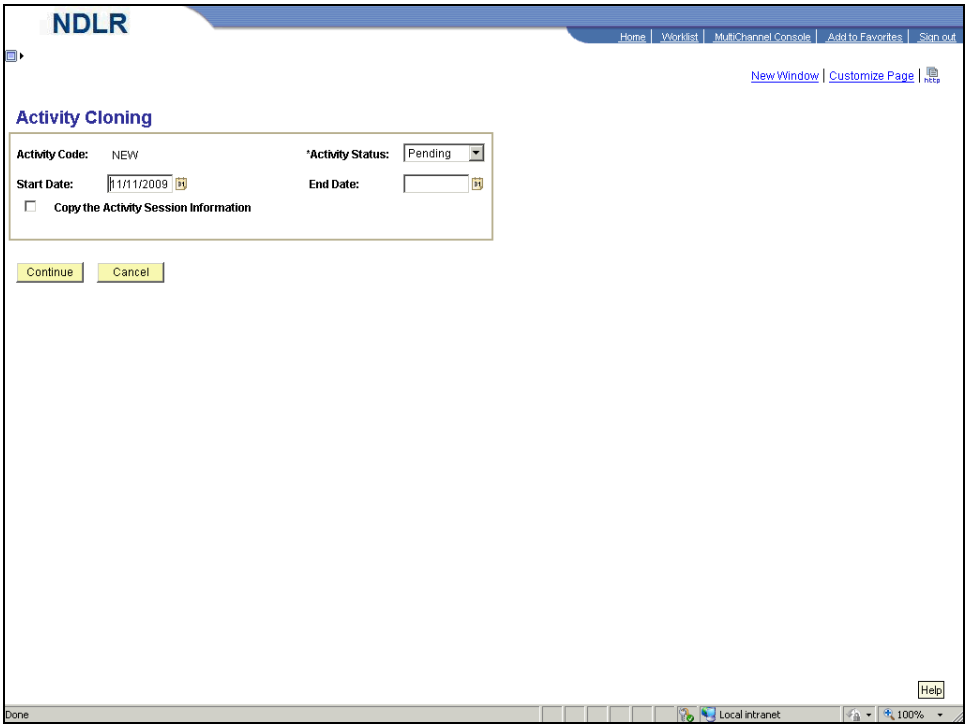
Step	Action
5.	Click the **Catalog** link. ▷ Catalog
6.	Click the **Maintain Activities** link. – Maintain Activities



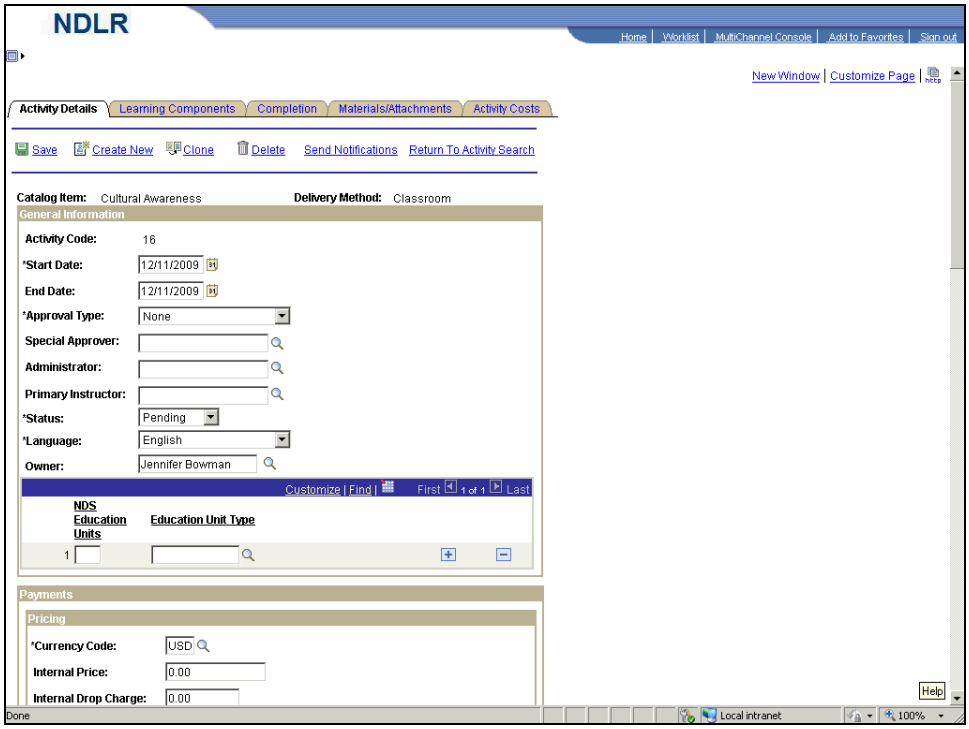
Step	Action
7.	Click the **Collapse Menu** button.
8.	In this example, search for an existing activity using the **Activity Code**.
9.	Click in the **Activity Code** field.
10.	Enter the desired information into the **Activity Code** field. Enter "**15**".
11.	Click the **Search** button. Search



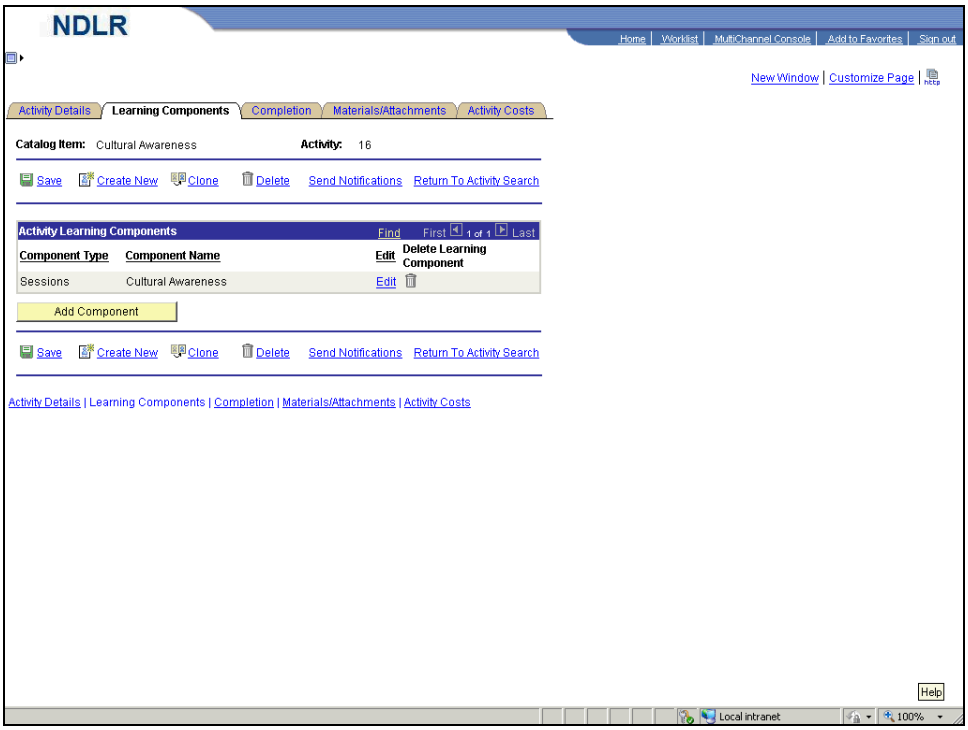
Step	Action
12.	Click the **Clone** link. Clone



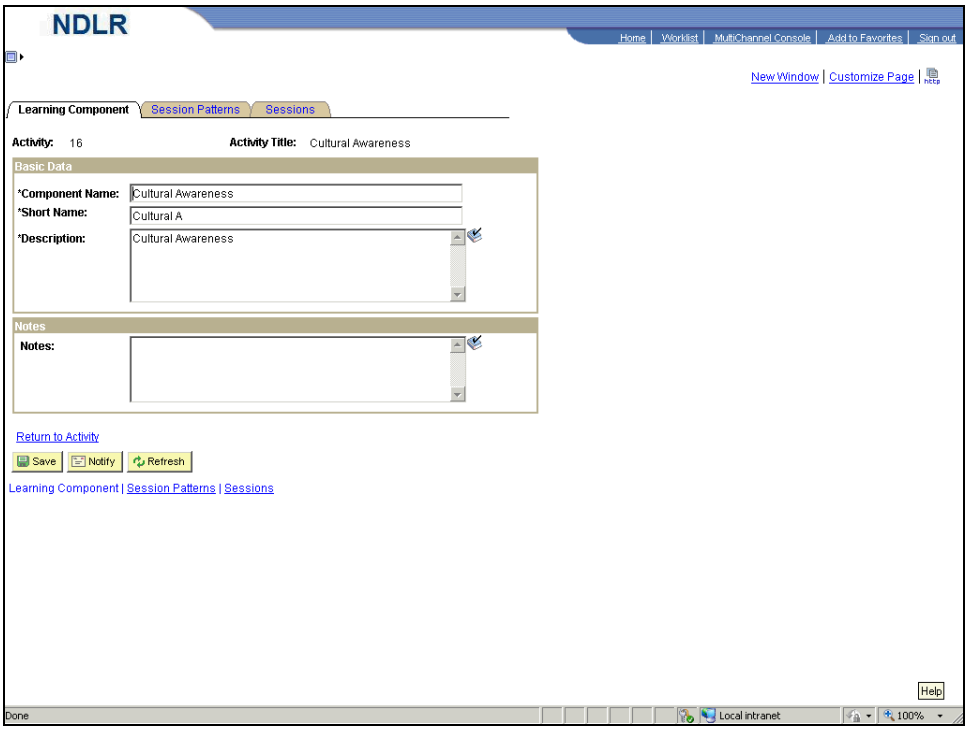
Step	Action
13.	Click in the **Start Date** field. 11/11/2009
14.	Enter the desired information into the **Start Date** field. Enter "**12/11/2009**".
15.	Click in the **End Date** field.
16.	Enter the desired information into the **End Date** field. Enter "**12/11/2009**".
17.	Click the **Copy the Activity Session Information** option.
18.	Click the **Continue** button. Continue



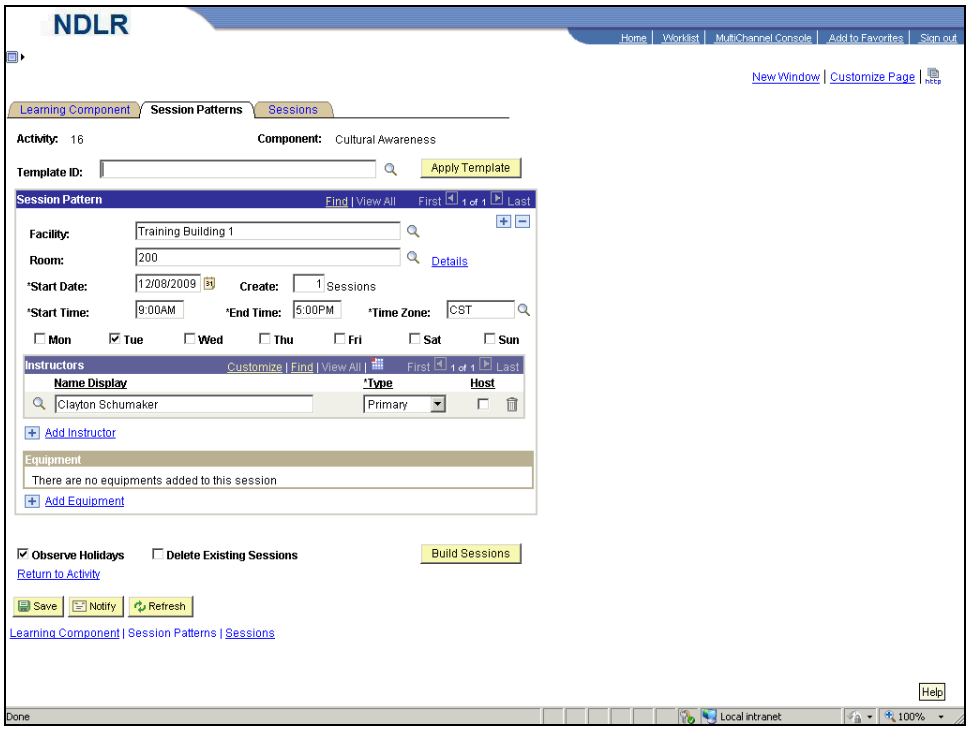
Step	Action
19.	Click the **Learning Components** tab. Learning Components



Step	Action
20.	Click the **Edit** link. Edit

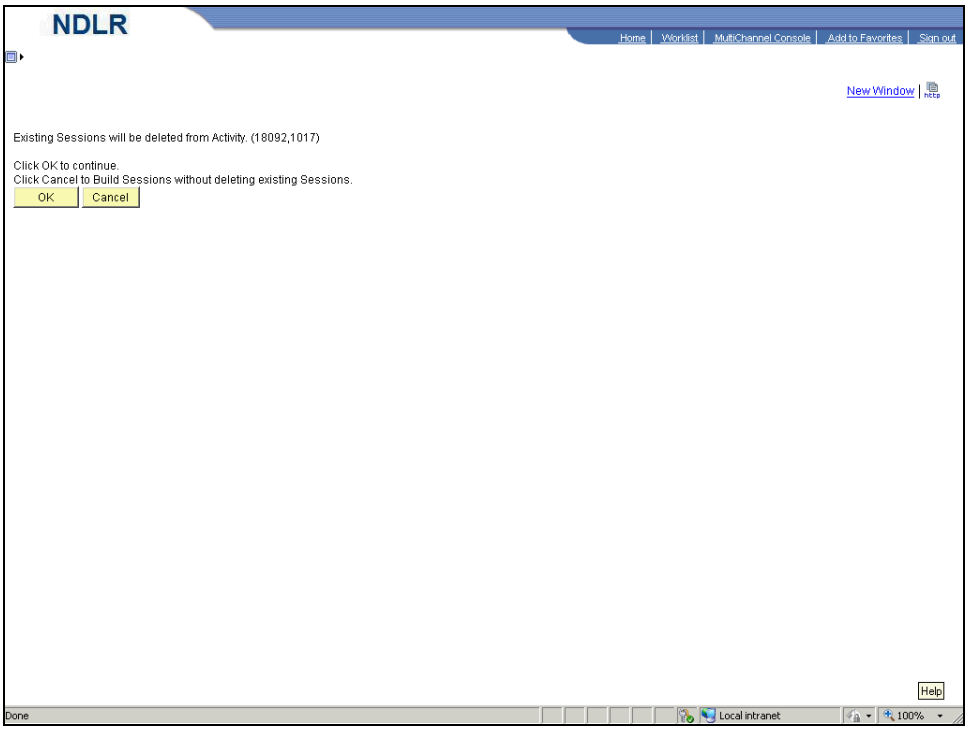


Step	Action
21.	Click the **Session Patterns** tab. Session Patterns
22.	Use the **Session Patterns** page to enter the information for the cloned activity.

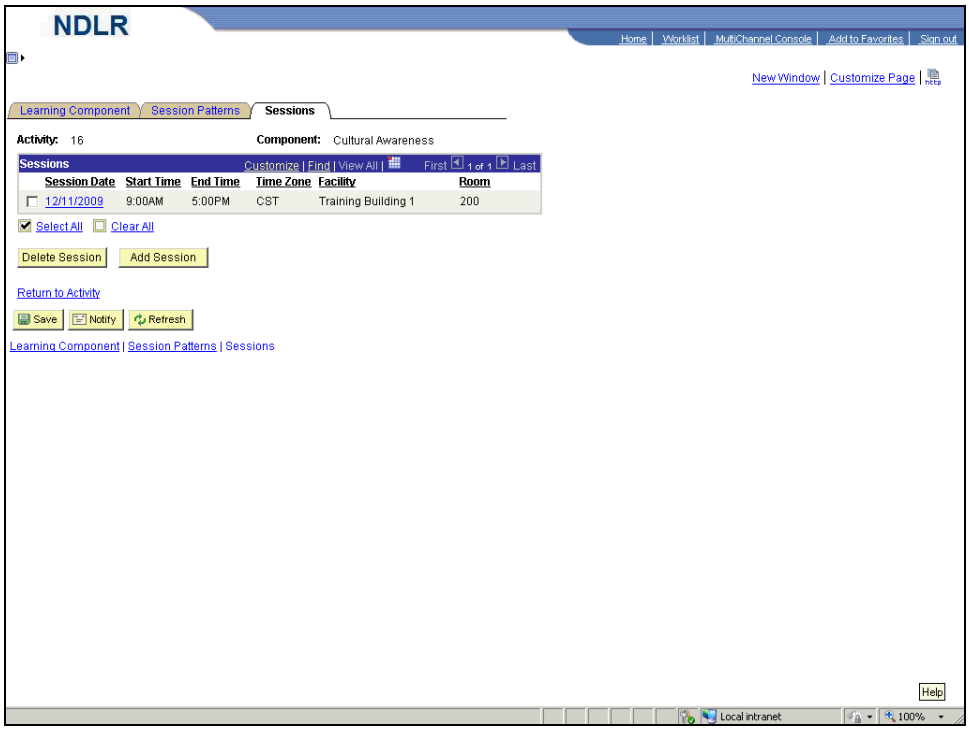


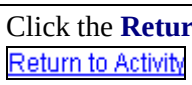
Step	Action
23.	Click in the **Start Date** field. 12/08/2009
24.	Press **[Delete]**.
25.	Enter the desired information into the **Start Date** field. Enter "**12/11/2009**".
26.	Uncheck the **Tue** option.
27.	Click the **Fri** option.
28.	Click the **Delete Existing Sessions** option.

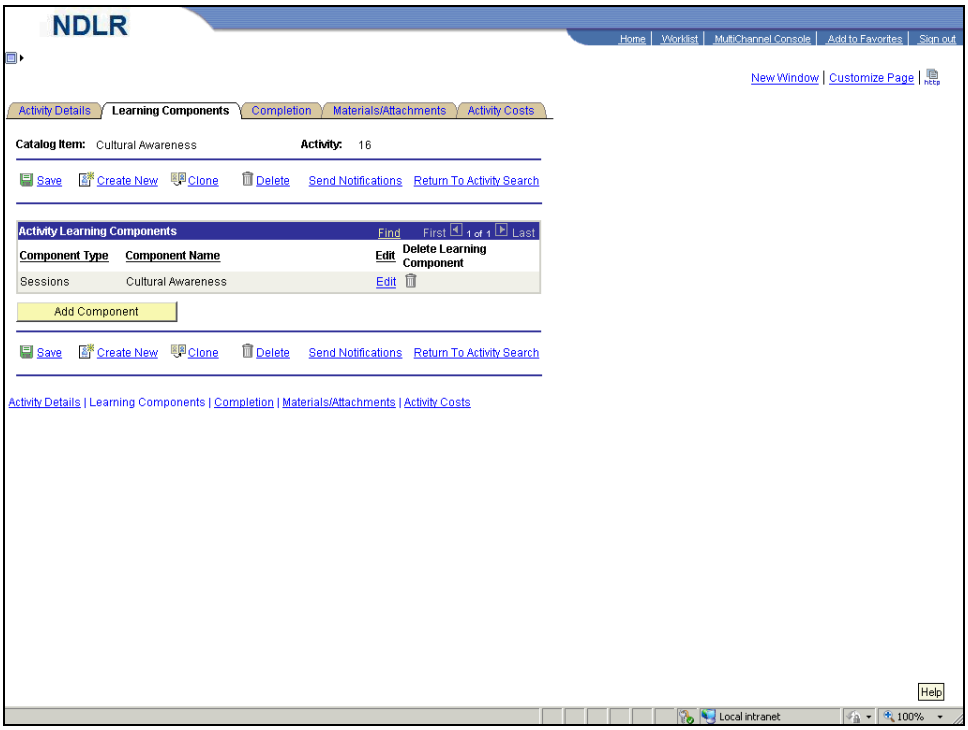
Step	Action
29.	Click the **Build Sessions** button. Build Sessions



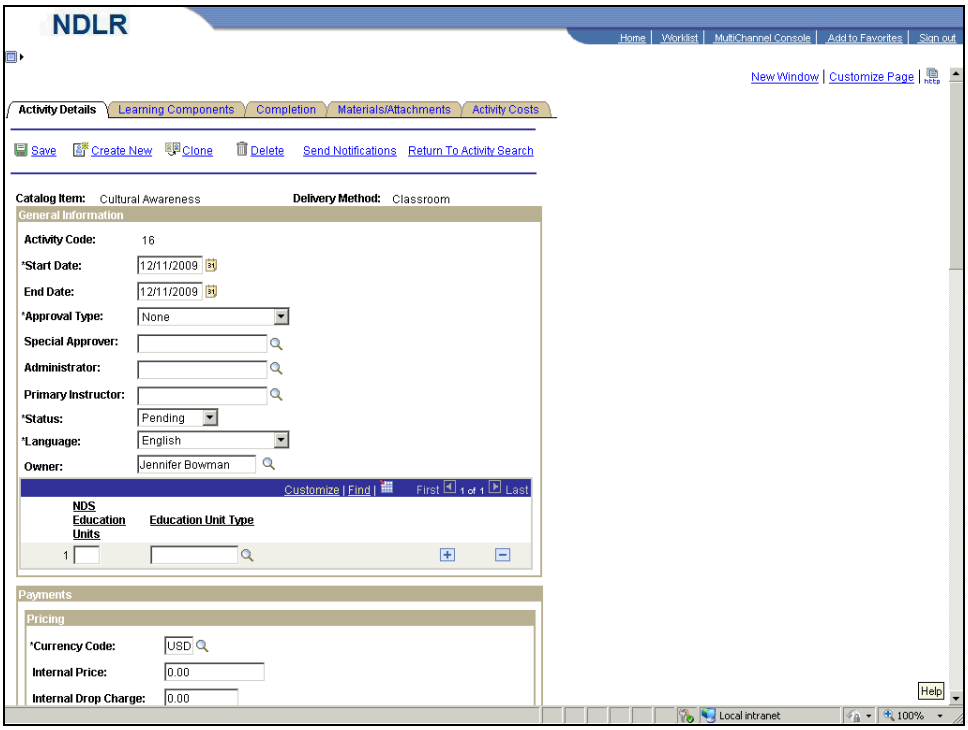
Step	Action
30.	Click the **OK** button. OK



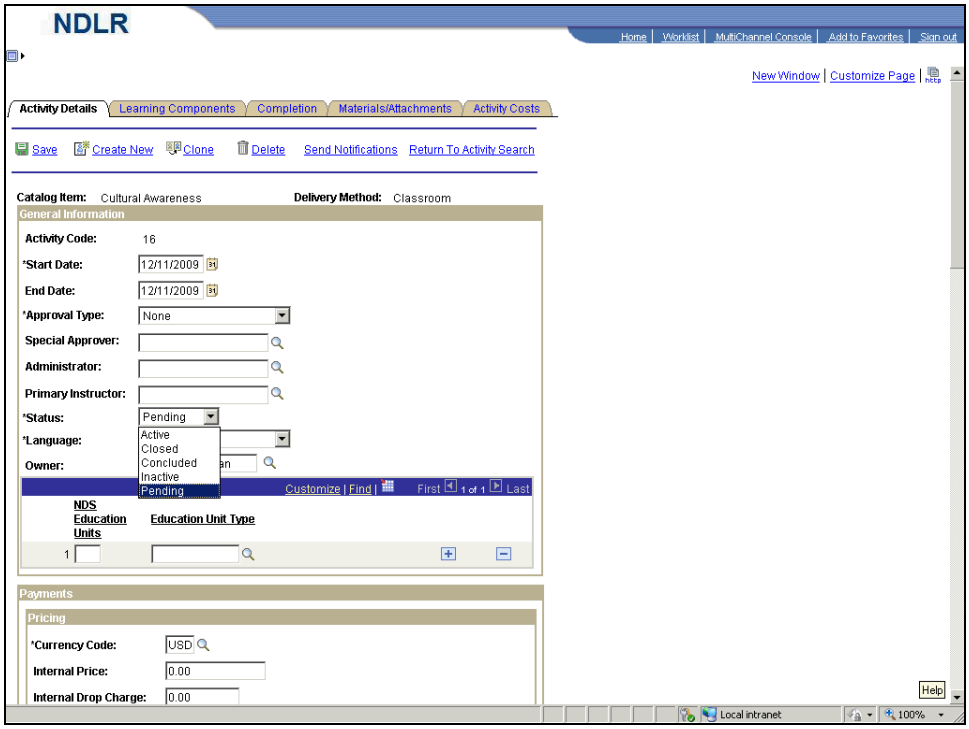
Step	Action
31.	Click the **Save** button.
32.	Click the **Return to Activity** link. 



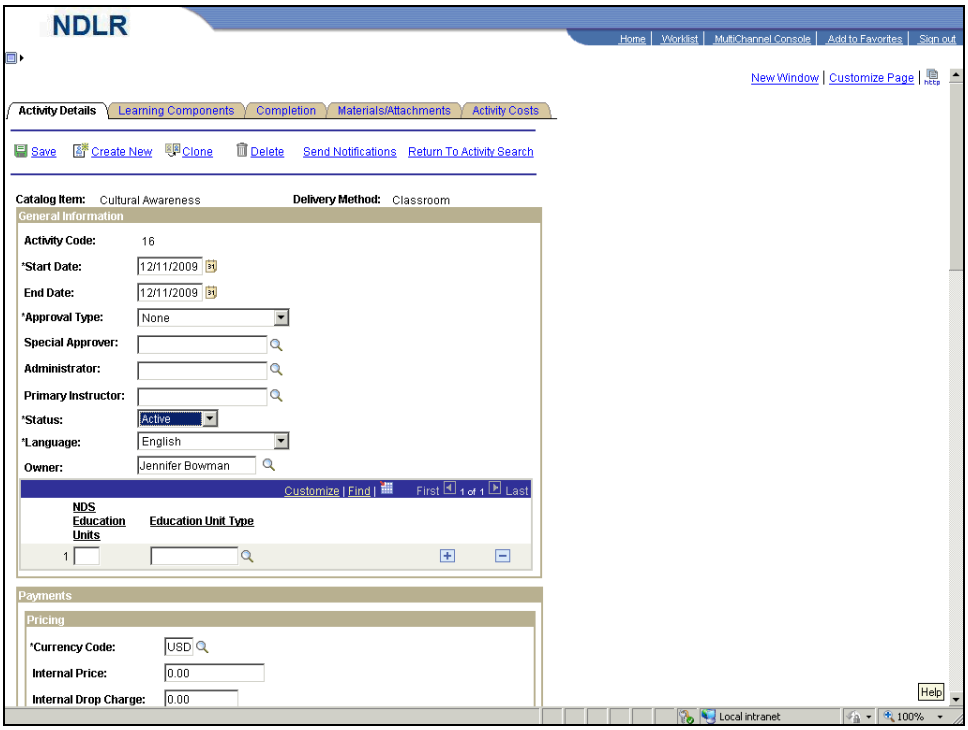
Step	Action
33.	Click the **Activity Details** tab. Activity Details



Step	Action
34.	Click the **Status** drop-down list.



Step	Action
35.	Select the "**Active**" list item.



Step	Action
36.	Click the **Save** link. Save
37.	**Congratulations**! You should now be able to: - Navigate to the **Activity Details** page. - Clone an activity. **End of Procedure.**

Lesson 6: Creating Programs

6.1 Creating a Curricula Program

Programs, like activities, appear in the learning catalog. When browsing the catalog, they are listed under the Programs heading. Programs consists of one or more sets of catalog items, whose completion may lead to the fulfillment of learning objectives.

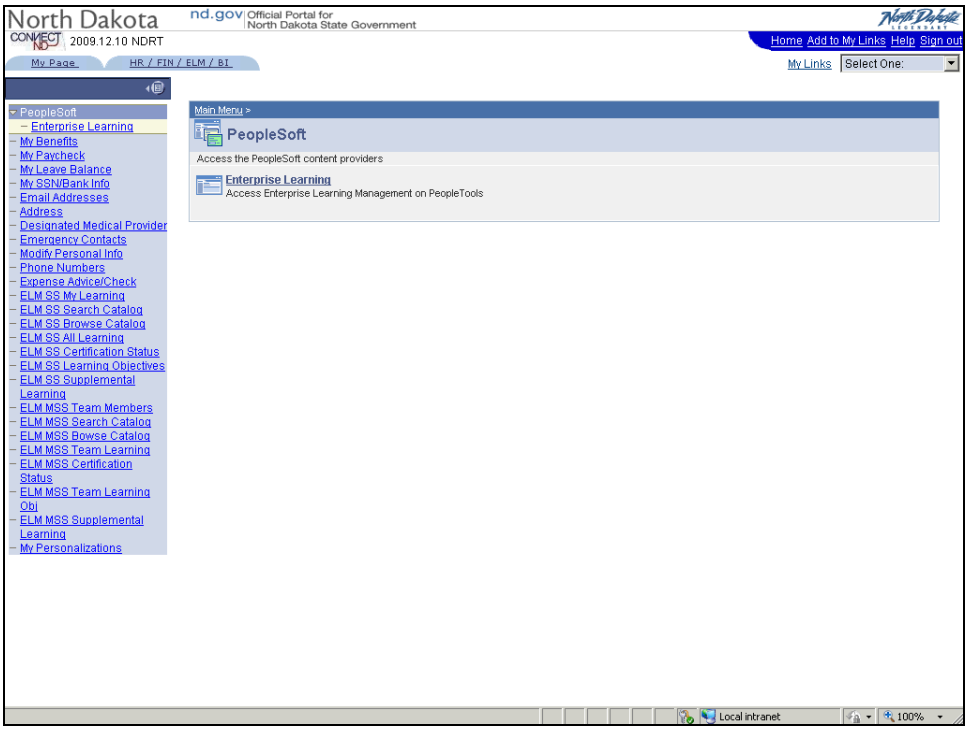
Curricula programs guides learners through a specific learning path over an unrestricted period of time. Learners can progress through courses at their own pace. For example, an organization may have a Management training curriculum.

Procedure

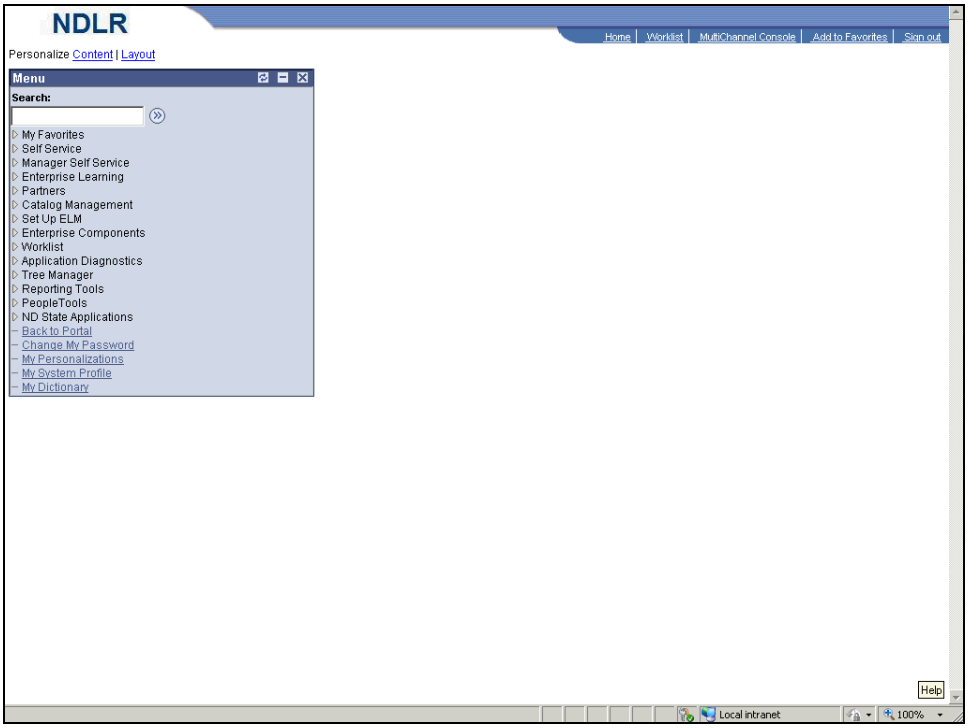
By the end of this topic, you will be able to:

- Navigate to the **Details** page.
- Create a curricula program.

Step	Action
1.	Begin by navigating to the **Maintain Programs - Details** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

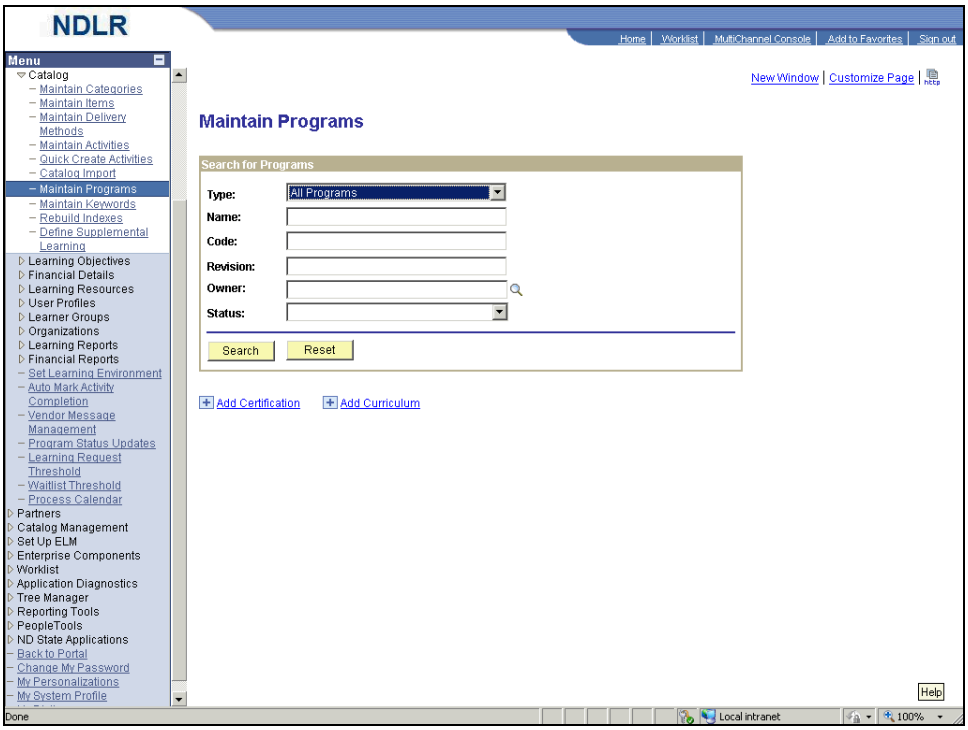


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

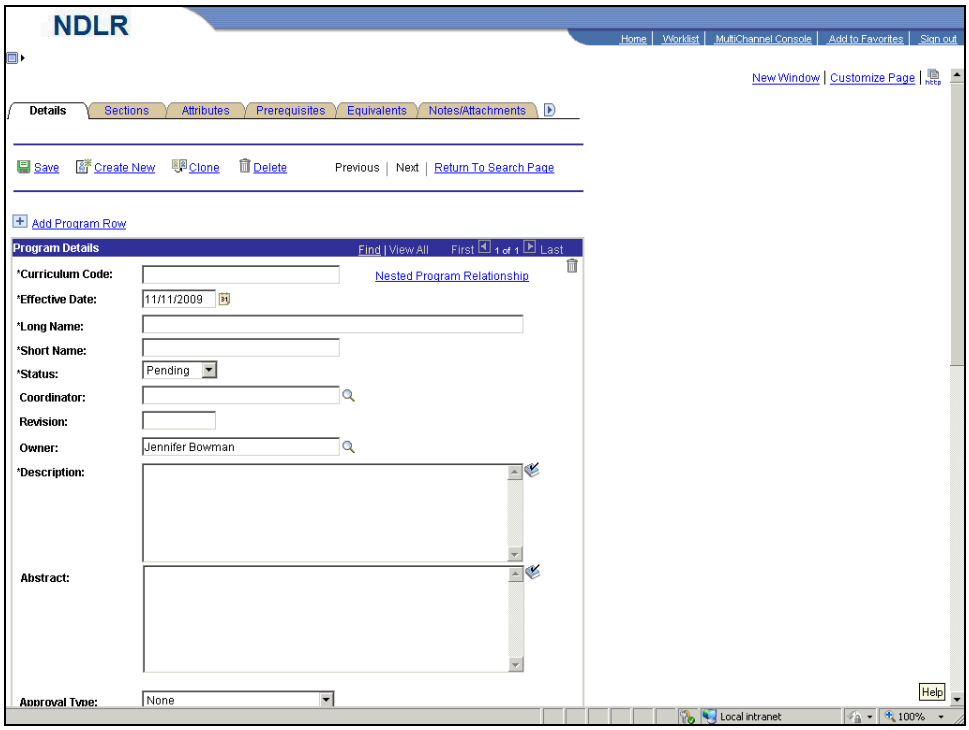


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **Catalog** link. ▷ Catalog
6.	Click the **Maintain Programs** link. – Maintain Programs



Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Add Curriculum** link. Add Curriculum
9.	Use the **Maintain Programs - Details** page to create a program code and description and to specify rules for registration payments, approvals and program waivers.
10.	Use the **Curriculum Code** as a unique identifier for the curricula. **Note**: The **Curriculum Code** should consist of an agencies 3-digit **Business Unit**, followed by the letter "P" to designate a program, followed by an agencies **Division** followed by a random four digit number.

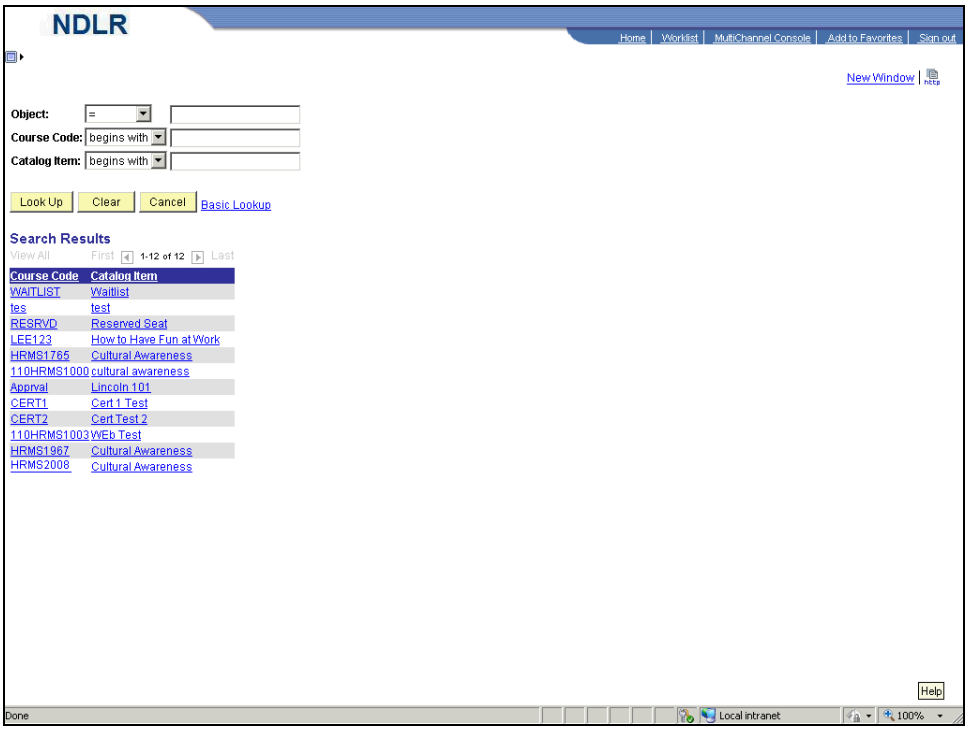


Step	Action
11.	Click in the **Curriculum Code** field.
12.	Enter the desired information into the **Curriculum Code** field. Enter "**110PHRMS1000**".
13.	Click in the **Long Name** field.
14.	Enter the desired information into the **Long Name** field. Enter "**Track 1**".
15.	Click in the **Short Name** field.
16.	Use the **Status** field to define this program as pending, inactive or active. Pending and inactive programs do not appear in the learner catalog. It is a good practice to leave the status as pending until you have completed and reviewed the new program definition.
17.	A program's **Coordinator** can view the online program roster, drop learners from the program and send email notifications to registered users. The Coordinator can be any instructor defined in your learning environment.
18.	Click in the **Description** field.

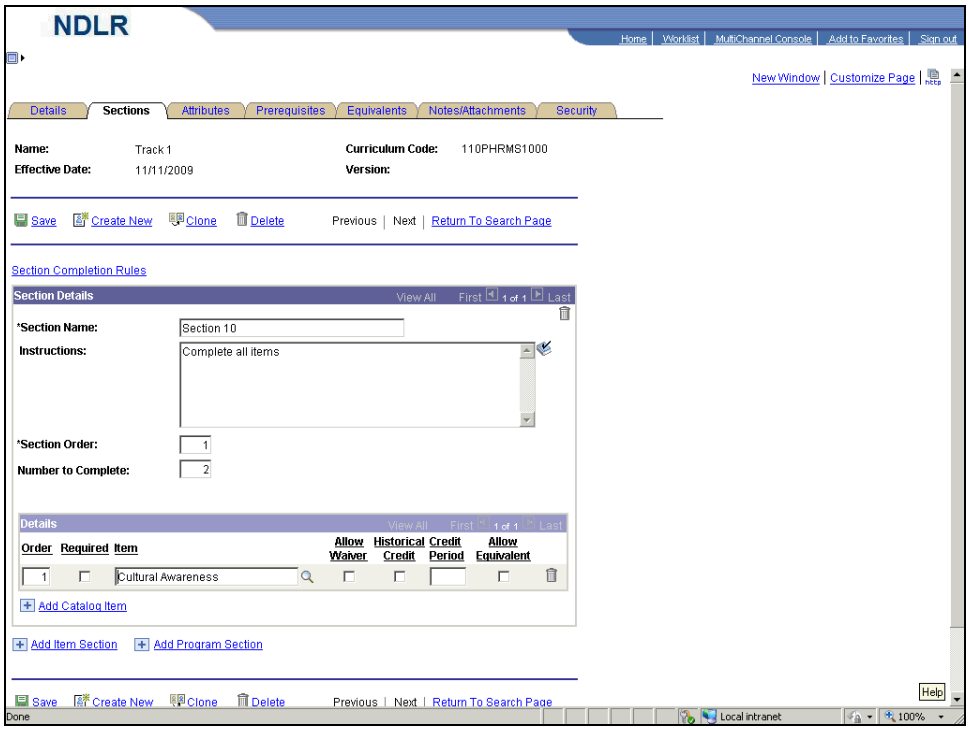
Step	Action
19.	Enter the desired information into the **Description** field. Enter "**Description**".
20.	Click in the **Abstract** field.
21.	Enter the desired information into the **Abstract** field. Enter "**Abstract**".
22.	Click the **navigation** bar.
23.	Use the **Allow Curriculum Waiver** field to enable a program to be waived for learners who complete supplemental learning that is mapped to a program. When a learner receives a waiver, the system marks the program as waived in learning history. However, it does not mark the activities that make up the program as waived. the learner receives credit for meeting the program's objectives.
24.	Use the **Payments** section to define the costs associated with this program.
25.	Use the **Internal Price** field to identify the price charged to the learner's department when the learner enrolls in the curricula.
26.	Click the **navigation** bar.
27.	Click the **Sections** tab.
28.	Use the **Maintain Programs - Sections** page to specify the sets of catalog items that make up the program. You must define at least one section per program and one item per section.

Step	Action
29.	Click the **Add Item Section** link. Add Item Section
30.	Enter the desired information into the **Section Name** field. Enter "**Section 10**".
31.	The **Instructions** field text appears in the learning catalog and on the learning plans.
32.	Click in the **Instructions** field.
33.	Enter the desired information into the **Instructions** field. Enter "**Complete all items**".
34.	Use the **Section Order** field to define the completion order for the program. If there is only one section, the field defaults to 1.
35.	The **Number to Complete** field should be used to specify the number of items a learner must complete to satisfy the curricula program.
36.	Click in the **Number to Complete** field. 0
37.	Press **[Delete]**.
38.	Enter the desired information into the **Section Order** field. Enter "**2**".

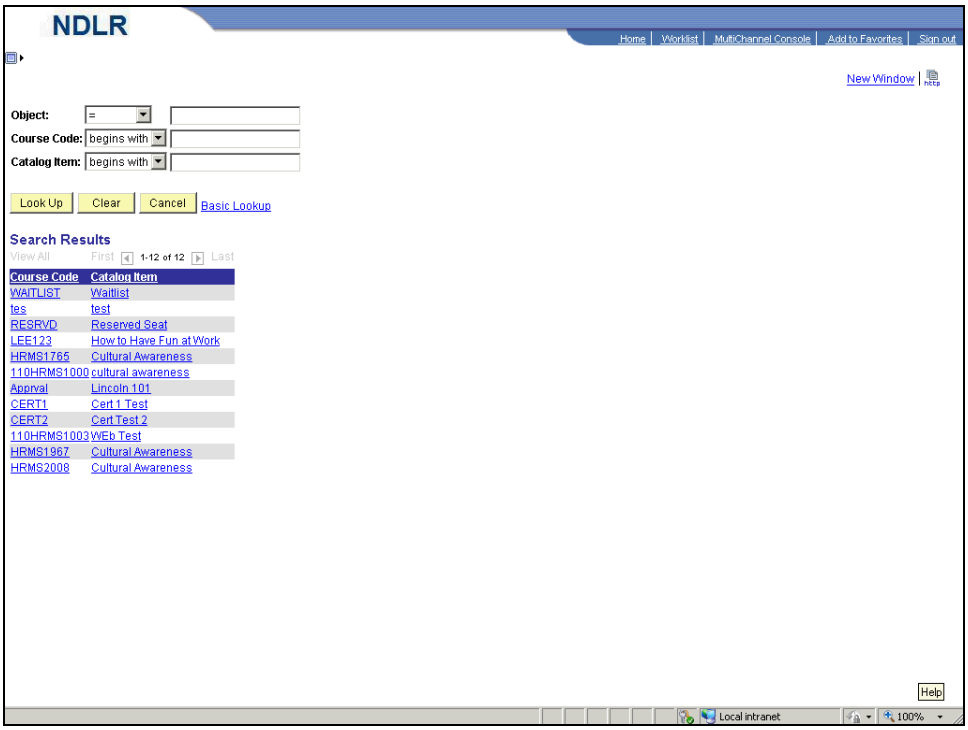
Step	Action
39.	Click the **Item Lookup** button.



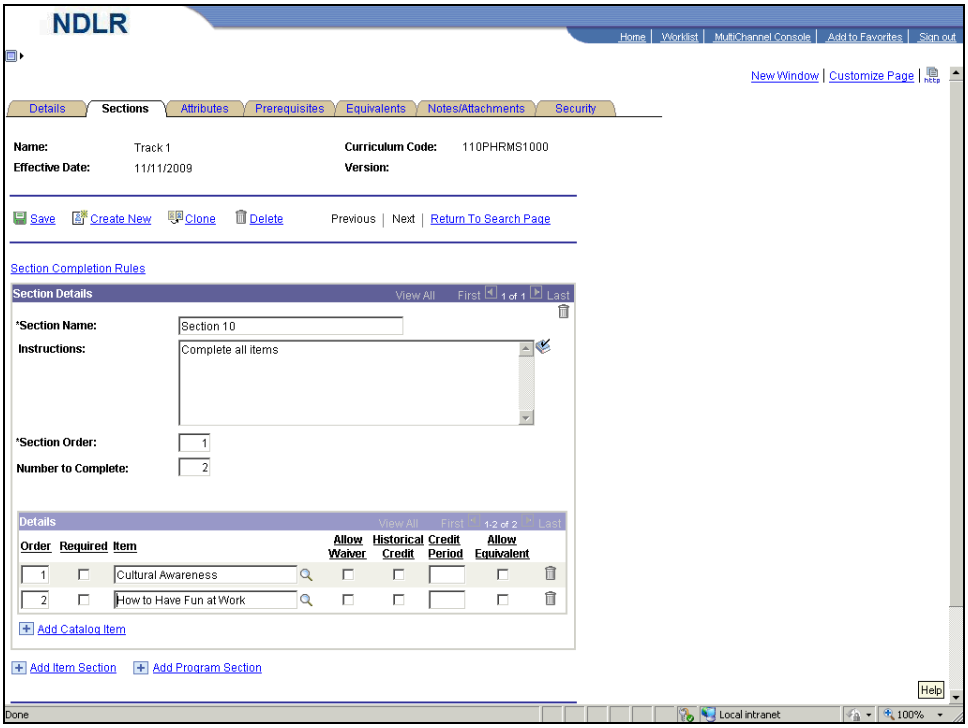
Step	Action
40.	Select the "**HRMS2008**" list item.
41.	The **Allow Waiver** option specifies if the catalog item can be waived. if the item is waived for a given learner, the learner gets completion credit for the item and its objectives.
42.	Use the **Historical Credit** option to enable the learner to get completion credit for having completed the item before registering for the program. Credit is given upon registration.
43.	If you enable the Historical Credit option, you will then use the **Credit Period** field to specify the number of days from the registration date within which the learner must have completed the item to receive credit.
44.	Use the **Allow Equivalent** option if there is an optional catalog item that can be taken instead of this one.
45.	For this example, you will add an additional catalog item to this section.



Step	Action
46.	Click the **Add Catalog Item** link. Add Catalog Item
47.	Click the **Item Lookup** button.



Step	Action
48.	Select the "**LEE123**" list item. LEE123 How to Have Fun at Work



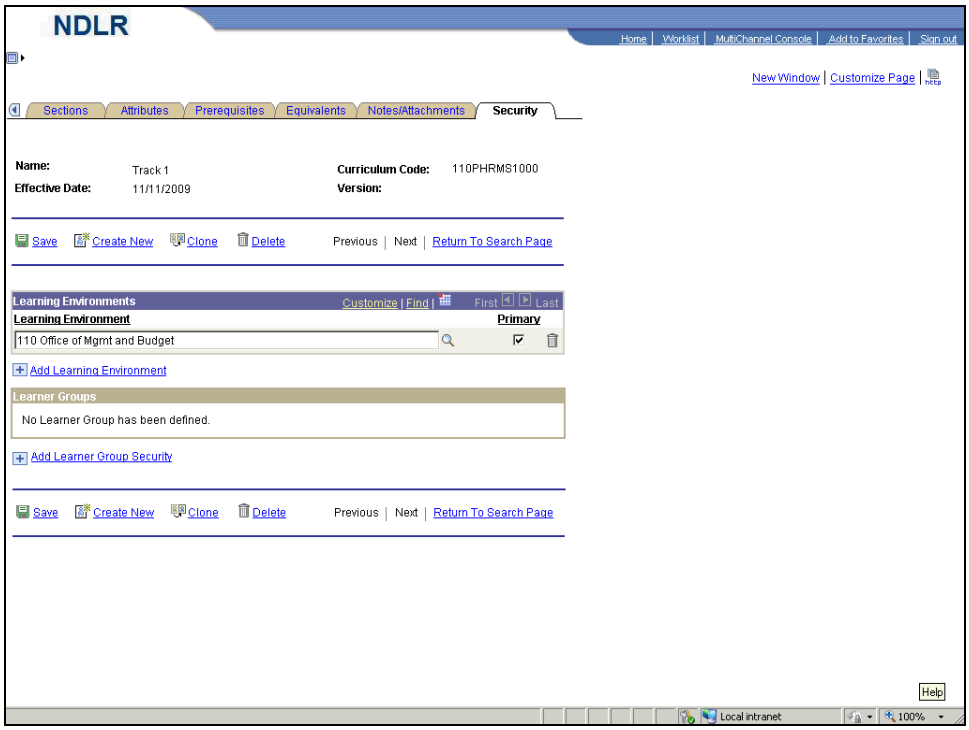
Step	Action
49.	Click the **Required** option.
50.	Click the **Required** option.
51.	Click the **Attributes** tab. Attributes
52.	Use the **Attributes** page to select the categories and objectives to associate with the program.

Step	Action
53.	Click the **Prerequisites** tab. Prerequisites
54.	Use the **Prerequisites** page to select required and recommended prerequisites.

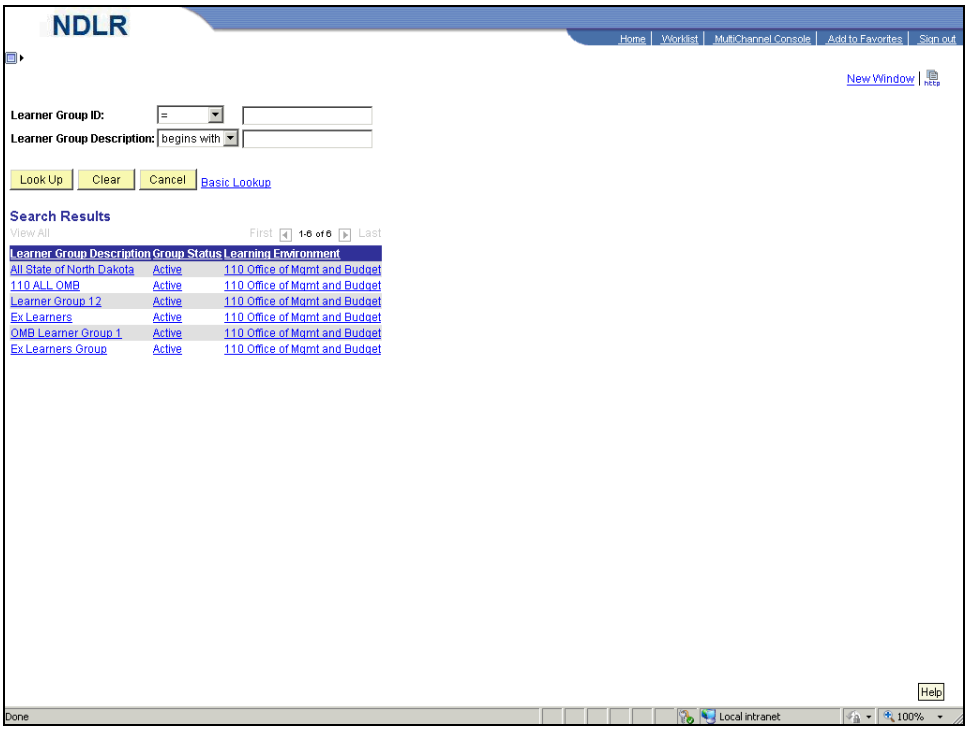
Step	Action
55.	Click the **Equivalents** tab. Equivalents
56.	Use the **Equivalents** page to identify other programs that are the equivalent of this one. For example, a Project Manager curricula may include all of the components of the Manager curricula.

Step	Action
57.	Click the **Notes/Attachments** tab. Notes/Attachments
58.	Use the **Notes/Attachments** page to enter notes and add attachments for the program.

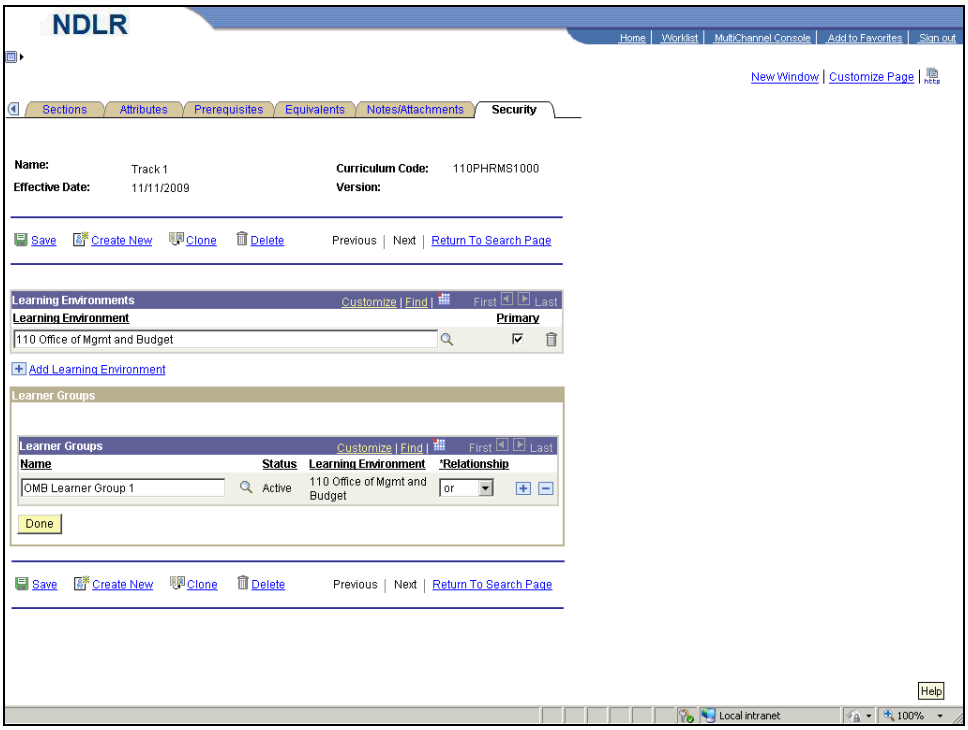
Step	Action
59.	Click the **Show following tabs** button.
60.	Click the **Security** tab.
61.	The system assigns the administrator's **Learning Environment** to the program by default.
62.	You must identify one of your Learning Environments as the Primary.



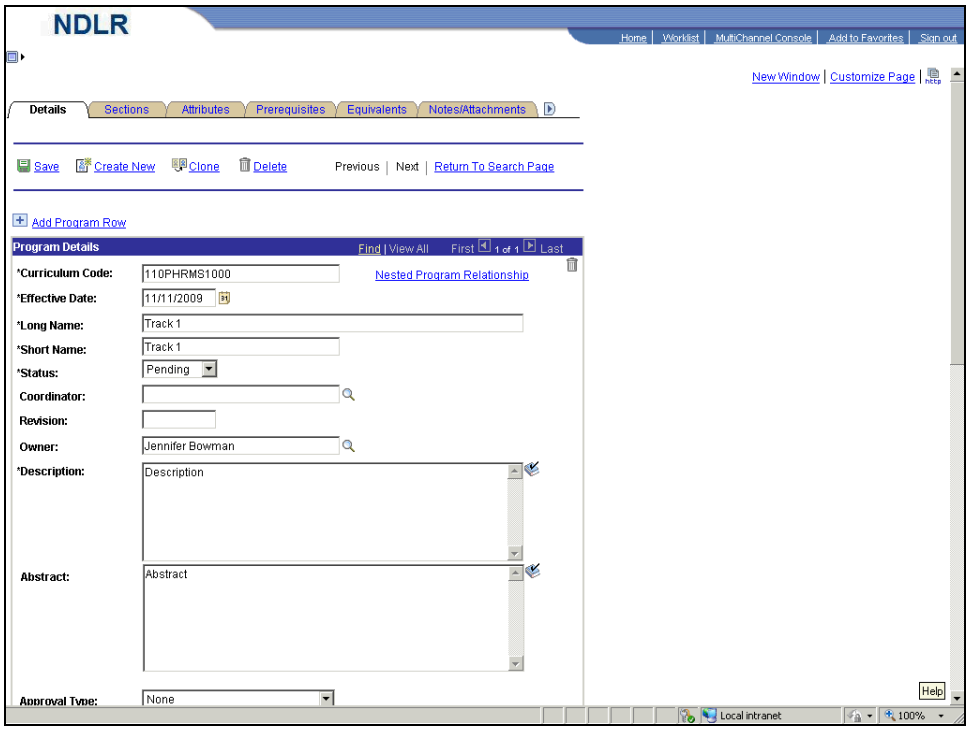
Step	Action
63.	Click the **Add Learner Group Security** link. Add Learner Group Security
64.	Use the **Name** field to assign a Learner Group to the program. Assigning a learner group to a program does not guarantee that all group members will have access to all of the program's items. It is the administrator's responsibility to ensure that there are no conflicts or inconsistencies between learner groups assigned to the program and learner groups assigned to the program's catalog items.
65.	Click the **Learner Group Prompt** button.



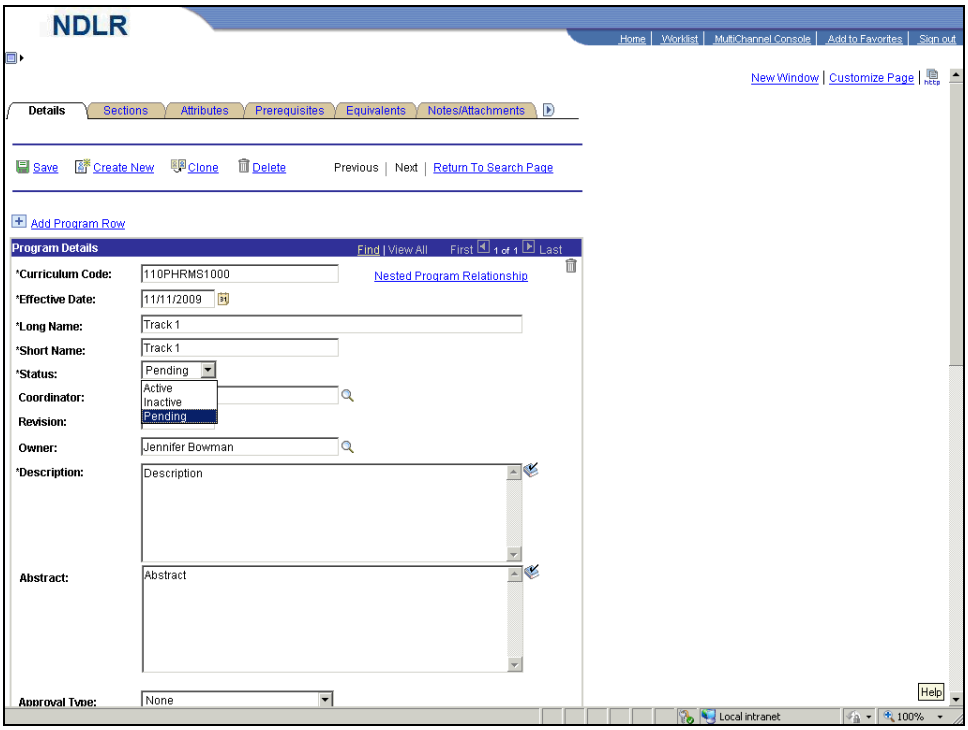
Step	Action
66.	Select the "**OMB Learner Group 1**" list item.



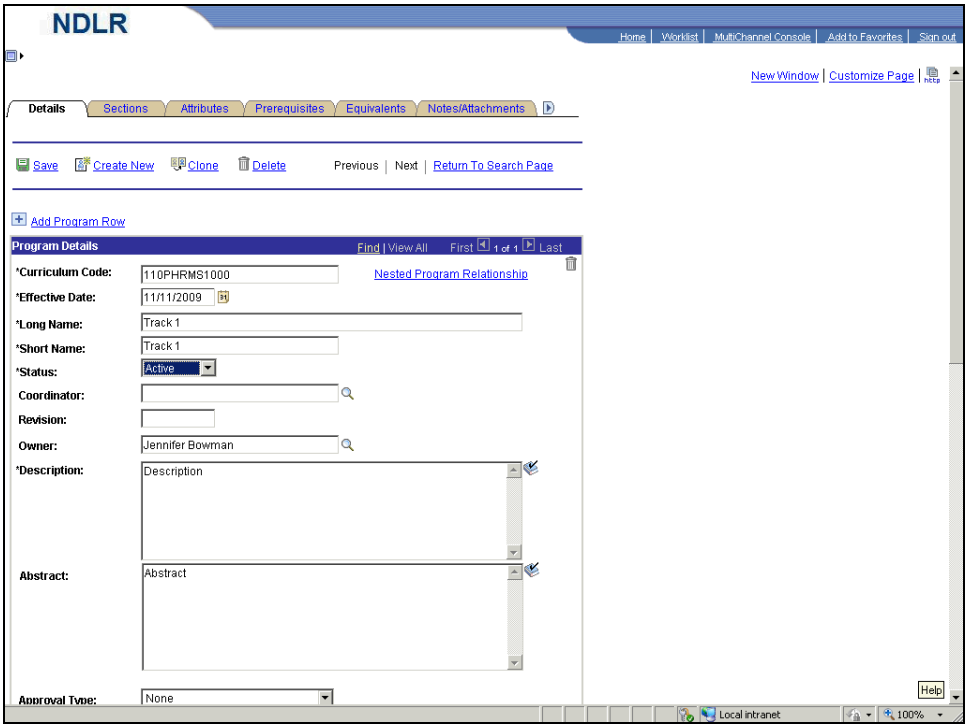
Step	Action
67.	Click the **Done** button.
68.	Click the **Save** link.
69.	At this point, you can review your program definition. Once reviewed, you should navigate back to the **Details** page to activate the program.
70.	Click the **Show previous tabs** button.
71.	Click the **Details** tab.



Step	Action
72.	Click the **Status** list.



Step	Action
73.	Click the **Active** list item. Active



Step	Action
74.	Click the **Save** link. Save
75.	**Congratulations**! You should now be able to: - Navigate to the Details page. - Create a curricula program. **Note**: When you create or update a program, the program and changes will appear the next day. **End of Procedure.**

6.2 Creating a Certification Program

Certification programs have a fixed begin date and end date. Typically, they include tests that learners must pass to become certified for a set period of time. Certification programs are particularly useful when learners must acquire a certificate or license, or they must develop or become proficient in a particular skill or competency within a given timeframe.

Recertification programs are a type of certification program. They specify the catalog items a learner must complete to become recertified after a certification expires. Procedures for setting up certification programs are the same as the curriculum programs except that you also specify:

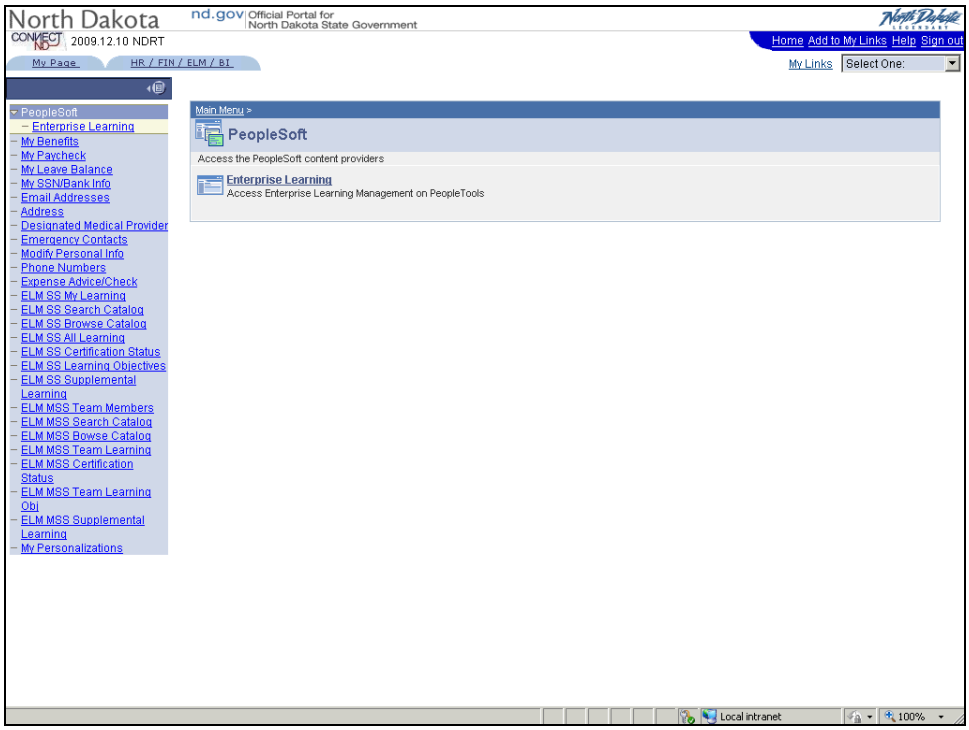
- Whether you are creating a certification program or a recertification program.
- How much time learners have to complete the program.
- Expiration and recertification rules.

Procedure

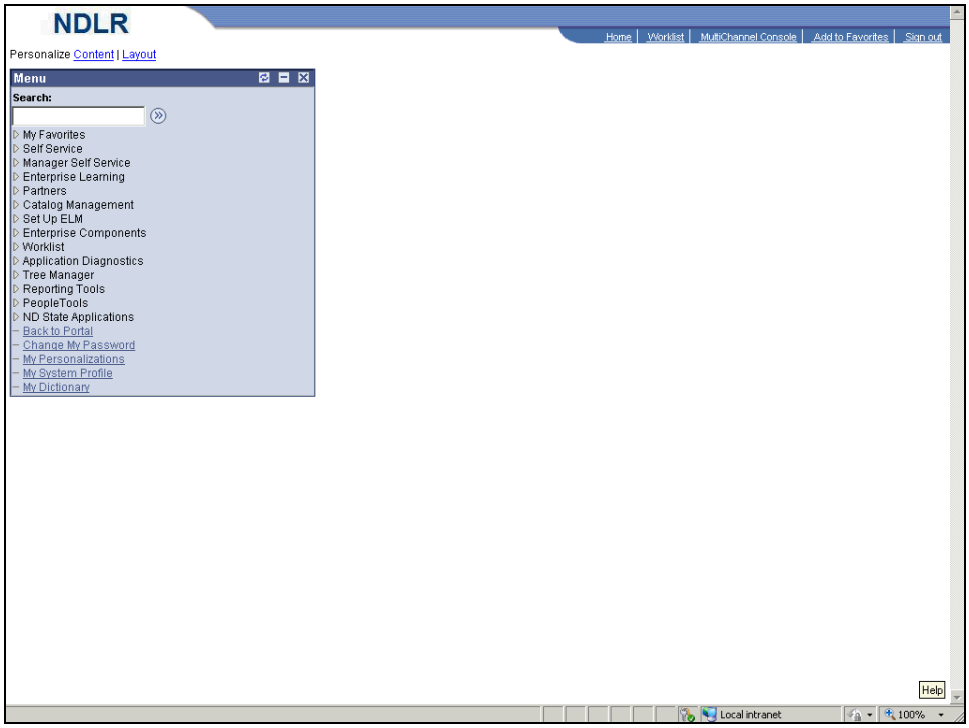
By the end of this topic, you will be able to:

- Navigate to the **Details** page.
- Create a certification program.

Step	Action
1.	Begin by navigating to the **Maintain Programs - Details** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

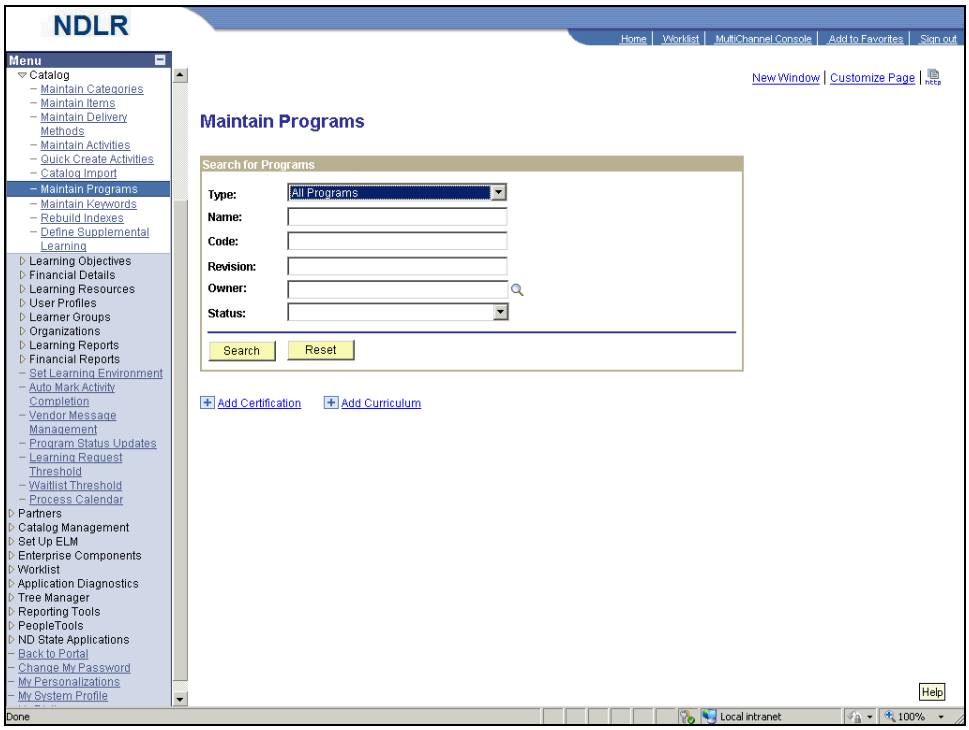


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

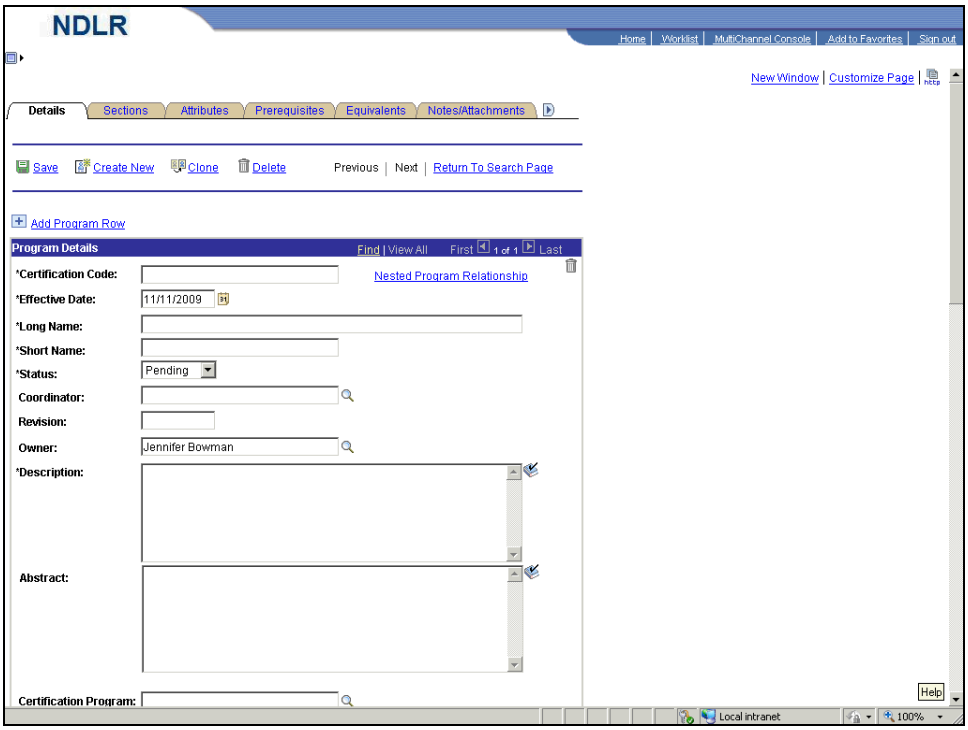


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **Catalog** link. ▷ Catalog
6.	Click the **Maintain Programs** link. – Maintain Programs



Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Add Certification** link. Add Certification
9.	Use the **Details** page to create a certification code and description and to specify rules for registration payments, approvals and program waivers.
10.	Use the **Certification Code** as a unique identifier for the certification. **Note**: The **Certification Code** should consist of an agencies 3-digit **Business Unit**, followed by the letter "P" to designate a program, followed by an agencies **Division** followed by a random four digit number.



Step	Action
11.	Click in the **Certification Code** field.
12.	Enter the desired information into the **Certification Code** field. Enter "**110PHRMS1001**".
13.	Click in the **Long Name** field.
14.	Enter the desired information into the **Long Name** field. Enter "**Certification 2009**".
15.	Click in the **Short Name** field.
16.	Use the **Status** field to define this program as pending, inactive or active. Pending and inactive programs do not appear in the learner catalog. **Note**: It is a good practice to leave the status as pending until you have completed and reviewed the new program definition.. For this example, retain the default value.
17.	A program's **Coordinator** can view the online program roster, drop learners from a program and send email notifications to registered users. The coordinator can be any instructor defined in your learning environment.
18.	Click in the **Description** field.

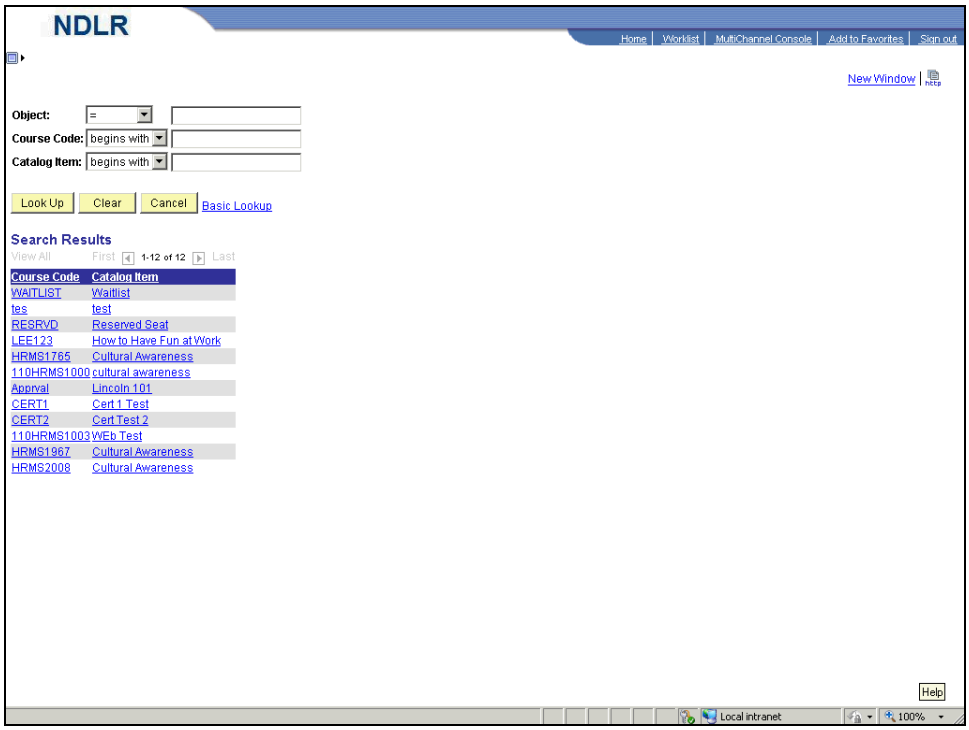
Step	Action
19.	Enter the desired information into the **Description** field. Enter "**Description**".
20.	Click in the **Abstract** field.
21.	Enter the desired information into the **Abstract** field. Enter "**Abstract**".
22.	Click the **navigation** bar.
23.	Use the **Internal Price** field to identify the price charged to a learner's department when they enroll in a certification program.
24.	Click in the **Internal Price** field. 0.00
25.	Press **[Delete]**.
26.	Enter the desired information into the **Internal Price** field. Enter "**100.00**".
27.	Use the **Internal Drop Charge** field to define the price charged to a learner's department when they drop a certification program.
28.	Click in the **Internal Drop Charge** field. 0.00
29.	Press **[Delete]**.
30.	Enter the desired information into the **Internal Drop Charge** field. Enter "**50.00**".
31.	Use the **Completion Type** field to calculate the completion date based on a fixed or delayed type.
32.	You can base the target completion date on a learner's registration date (select **Fixed** in the **Completion Type** field) or on the date a learner completes the first item in a program (select **Delayed** in the **Completion Type** field). For this example, retain the default value.
33.	Use the **Completion Period** field in conjunction with the Completion Type to calculate the completion date for the certification. For this example, retain the default value.
34.	Use the **Warning Period** field to define the number of days before the completion period date that the system is to send an email reminder to learners. **Note**: Clear the field or enter 0 to have emails sent on the completion period date.

Step	Action
35.	Click in the **Warning Period** field. 0
36.	Press **[Delete]**.
37.	Enter the desired information into the **Warning Period** field. Enter "**15**".
38.	Click the **navigation** bar.
39.	Use the **Validity Period** field to define the number of days for which the certification is valid after program completion. As an alternative, you can enter a fixed date in the Expiration Date field.
40.	Use the **Grace Period** field to define the number of days a certification remains in effect after the expiration date.
41.	Click in the **Grace Period** field.
42.	Enter the desired information into the **Grace Period** field. Enter "**30**".
43.	Use the **Expiration Warning Period** field to define the number of days before the expiration date that the system is to send an email reminder to learners. **Note**: Clear the field or enter 0 to have emails sent on the expiration date.
44.	Click in the **Expiration Warning Period** field.
45.	Enter the desired information into the **Expiration Warning Period** field. Enter "**60**".
46.	Use the **Recertification Period** field to define the number of days after the grace period that learners have to complete the recertification program to reinstate their certification. After a recertification period expires, learners must repeat the original certification program.
47.	Click in the **Recertification Period** field.
48.	Enter the desired information into the **Recertification Period** field. Enter "**30**".
49.	Use the **Recertification Warning Period** field to define the number of days before the expiration of a recertification period that the system will send an email reminder to learners.
50.	Click in the **Recertification Warning Period** field.

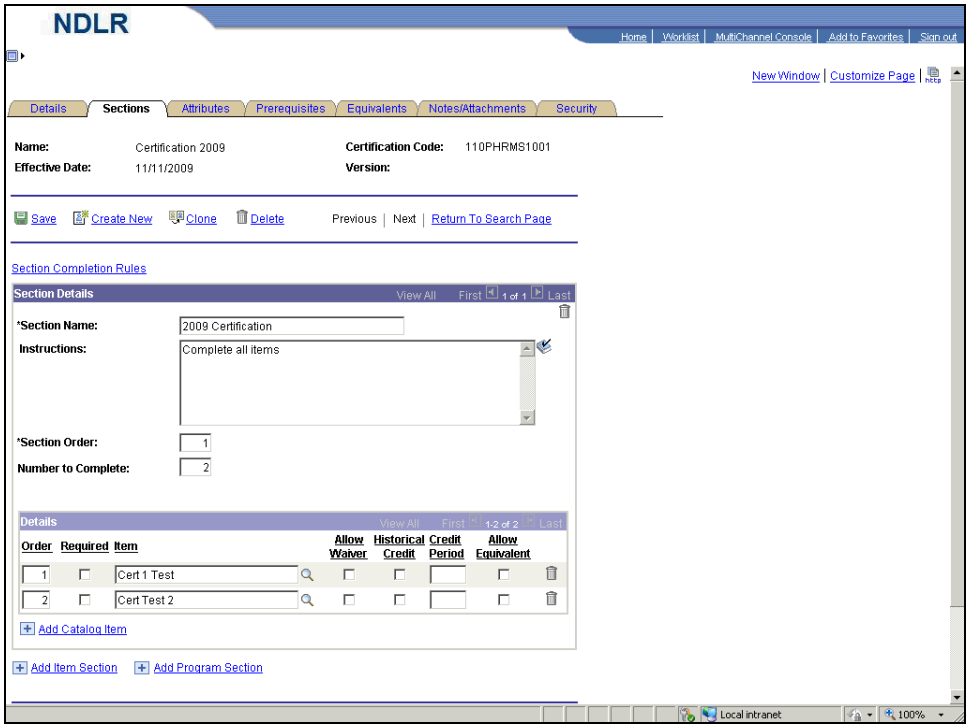
Step	Action
51.	Enter the desired information into the **Recertification Warning Period** field. Enter "**30**".
52.	Click the **navigation** bar.
53.	Click the **navigation** bar.
54.	Click the **Sections** tab. Sections
55.	Use the **Sections** page to specify the sets of catalog items that make up the program. You must define at least one section per program and one item per section.

Step	Action
56.	Click the **Add Item Section** link. Add Item Section
57.	Enter the desired information into the **Section Name** field. Enter "**2009 Certification**".
58.	The **Instructions** field text appears in the learning catalog and on the learning plans.
59.	Click in the **Instructions** field.

Step	Action
60.	Enter the desired information into the **Instructions** field. Enter "**Complete all items**".
61.	Use the **Section Order** field to define the completion order for the program. If there is only one section, the field defaults to 1.
62.	The **Number to Complete** field should be used to specify the number of items a learner must complete to satisfy the curricula program.
63.	Click in the **Section Order** field. 0
64.	Press **[Delete]**.
65.	Enter the desired information into the **Section Order** field. Enter "**2**".
66.	Click the **Item Lookup** button.
67.	Select the "**CERT1**" list item. CERT1 Cert 1 Test
68.	The **Allow Waiver** option specifies if the catalog item can be waived. If the item is waived for a given learner, the learner gets completion credit for the item and its objectives.
69.	Use the **Historical Credit** option to enable the learner to get completion credit for having completed the item before registering for the program. Credit is given upon registration.
70.	If you enable the Historical Credit option, you will use the **Credit Period** field to specify the number of days from the registration date within which a learner must complete the item to receive credit.
71.	Use the **Allow Equivalent** option if there is an optional catalog item that can be taken instead of this one.
72.	Click the **Add Catalog Item** link. Add Catalog Item
73.	Click the **Item Lookup** button.

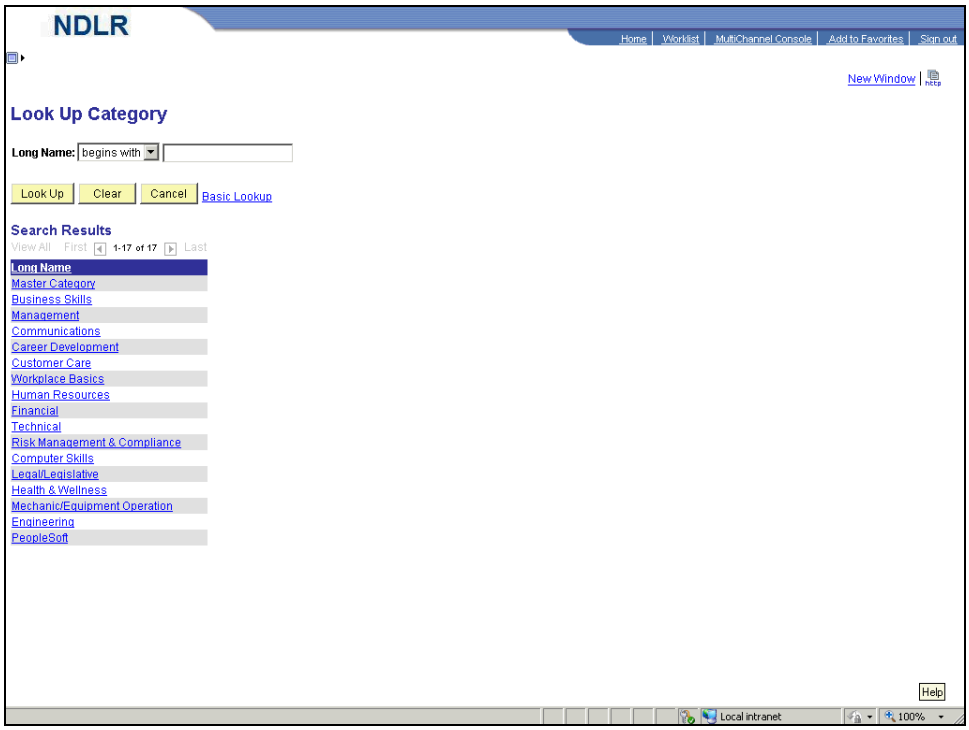


Step	Action
74.	Select the "**CERT2**" list item. CERT2 Cert Test 2



Step	Action
75.	Click the **Required** option.
76.	Click the **Required** option.
77.	Click the **Attributes** tab. Attributes
78.	Use the **Attributes** page to select the categories and objectives to associate with the program.

Step	Action
79.	Click the **Add Category** link. Add Category
80.	Use the **Category** field to associate the program with a category in the catalog. Learners can use the catalog to search for programs by category.
81.	Click the **Category Lookup** button.



Step	Action
82.	Select the "**Communications**" list item. Communications

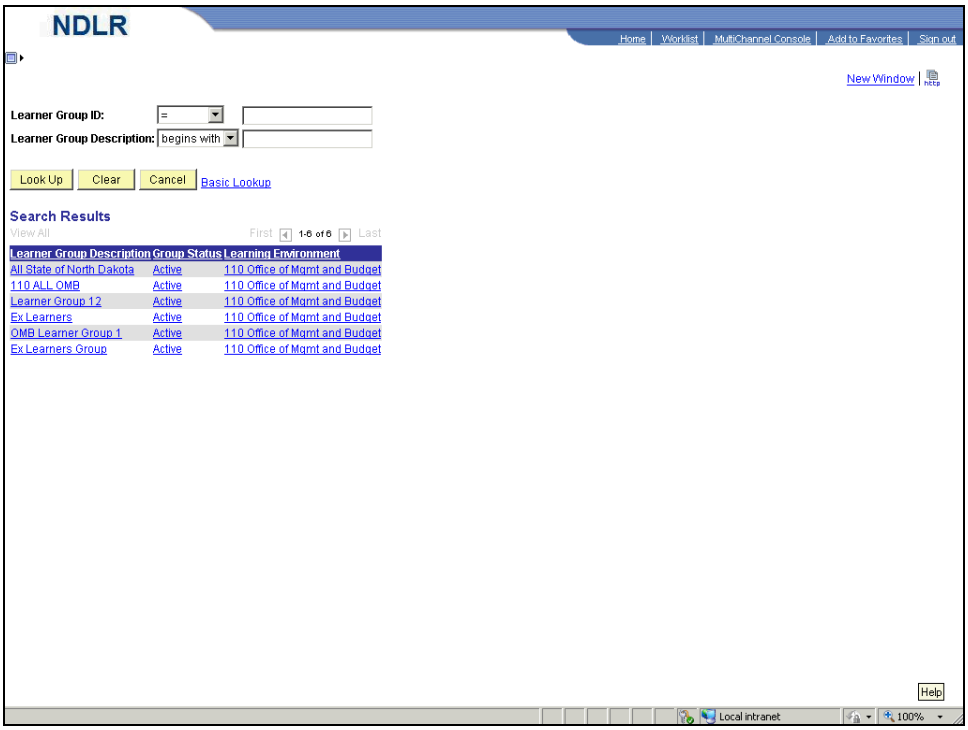
Step	Action
83.	Click the **Prerequisites** tab. Prerequisites
84.	Use the **Prerequisites** page to select required and recommended prerequisites.

Step	Action
85.	Click the **Equivalents** tab. Equivalents
86.	Use the **Equivalents** page to identify other programs that are equivalent. For example, a Project Manager certification may include all of the components of the Manager certification.

Step	Action
87.	Click the **Notes/Attachments** tab. Notes/Attachments
88.	Use the **Notes/Attachments** page to enter notes and add attachments for the program.

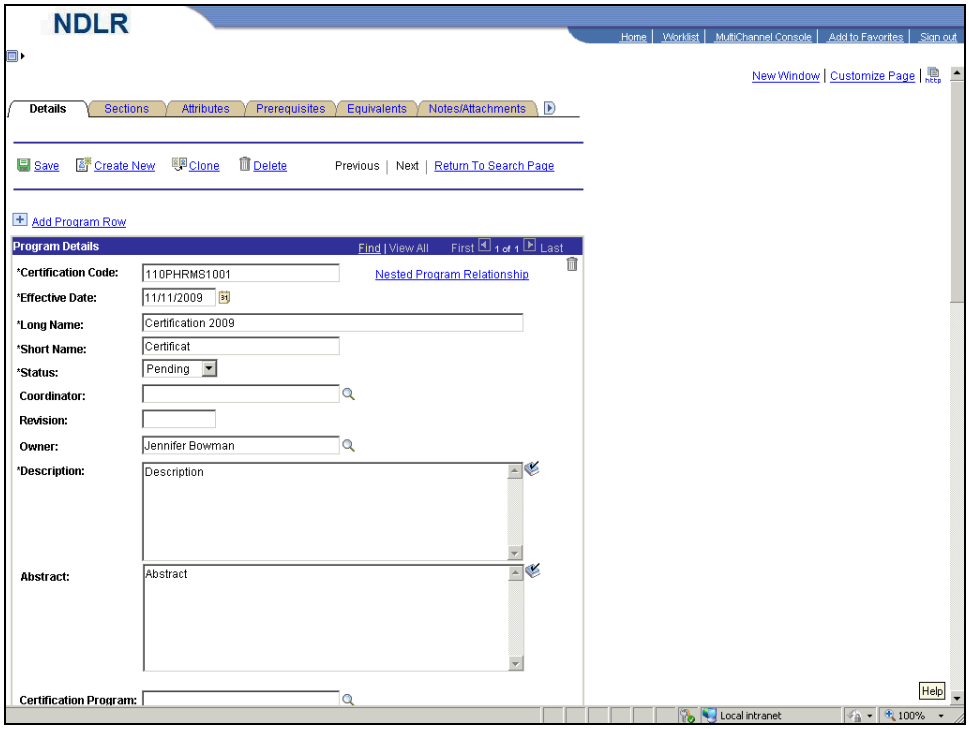
Step	Action
89.	Click the **Show following tabs** button.
90.	Click the **Security** tab.
91.	Use the **Security** page to select the learning environments and learner groups that can access the program.
92.	The system assigns the administrator's **Learning Environment** to the program by default.

Step	Action
93.	Click the **Add Learner Group Security** link. Add Learner Group Security
94.	Use the **Name** field to assign a Learner Group to the program. Assigning a learner group to a program does not guarantee that all group members will have access to all of the programs items. It is the Catalog Administrators responsibility to ensure there are no conflicts or inconsistencies between learner groups assigned to the program and learner groups assigned to the programs catalog items.
95.	Click the **Name Lookup** button. 🔍

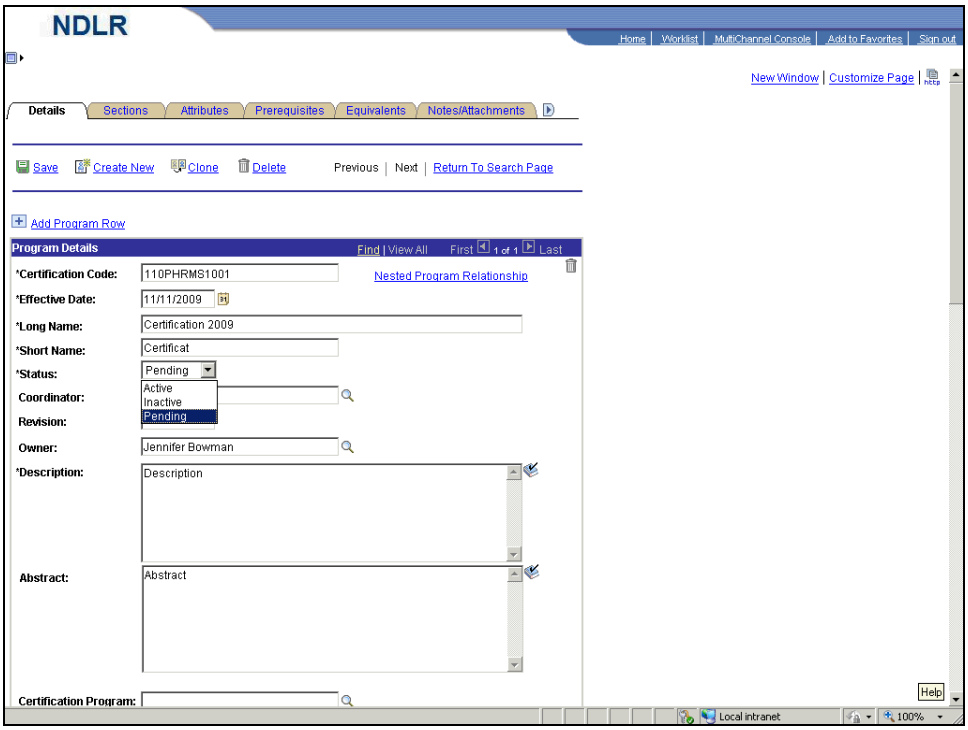


Step	Action
96.	Select the "**OMB Learner Group 1**" link.

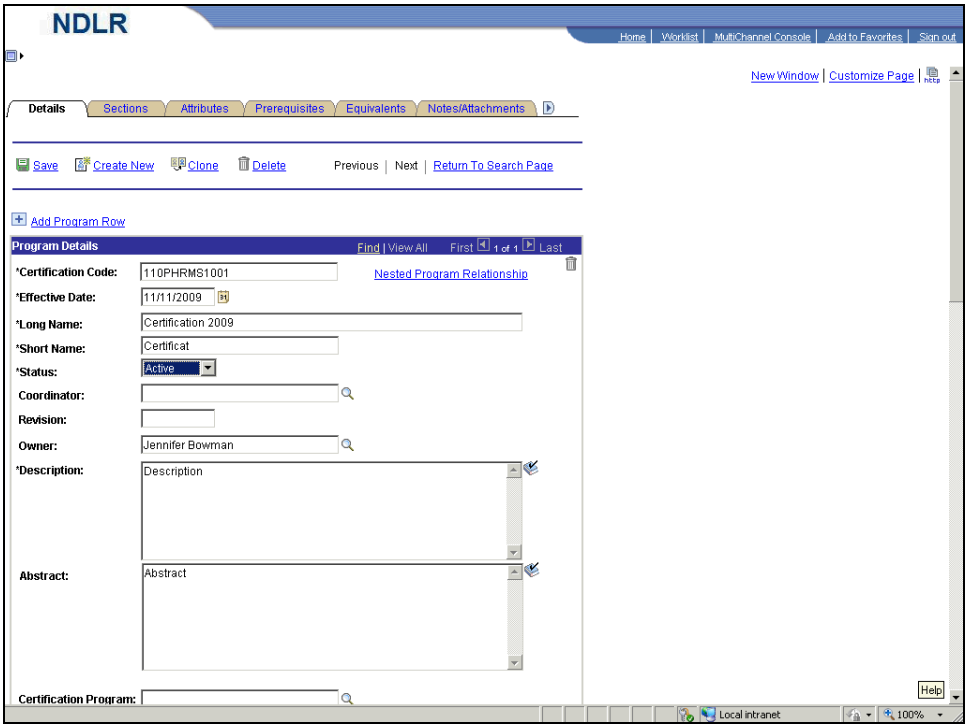
Step	Action
97.	Click the **Done** button. Done
98.	Click the **Save** link. Save
99.	After the program has been saved it is recommended that you review the program definition before activating the program. Once reviewed, navigate back to the **Details** page to activate the program.
100.	Click the **Show previous tabs** button.
101.	Click the **Details** tab. Details



Step	Action
102.	Click the **Status** drop-down list.



Step	Action
103.	Select the "**Active**" list item. Active



Step	Action
104.	Click the **Save** link. Save
105.	**Congratulations**! You should now be able to: - Navigate to the **Details** page. - Create a certification program. **End of Procedure.**

Lesson 7: Administering Enrollment and Registration

7.1 Enrolling Learners into an Activity

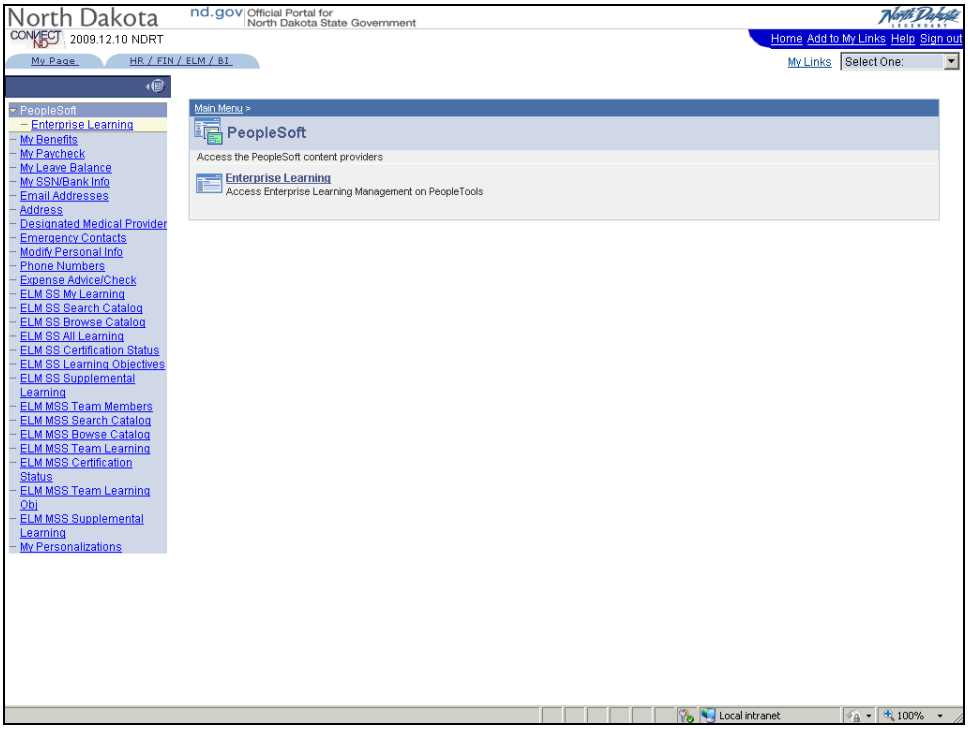
Learning Administrators have the ability to enroll specific learners into a class. This gives an administrator another option for enrolling learners besides mass enrollments.

Procedure

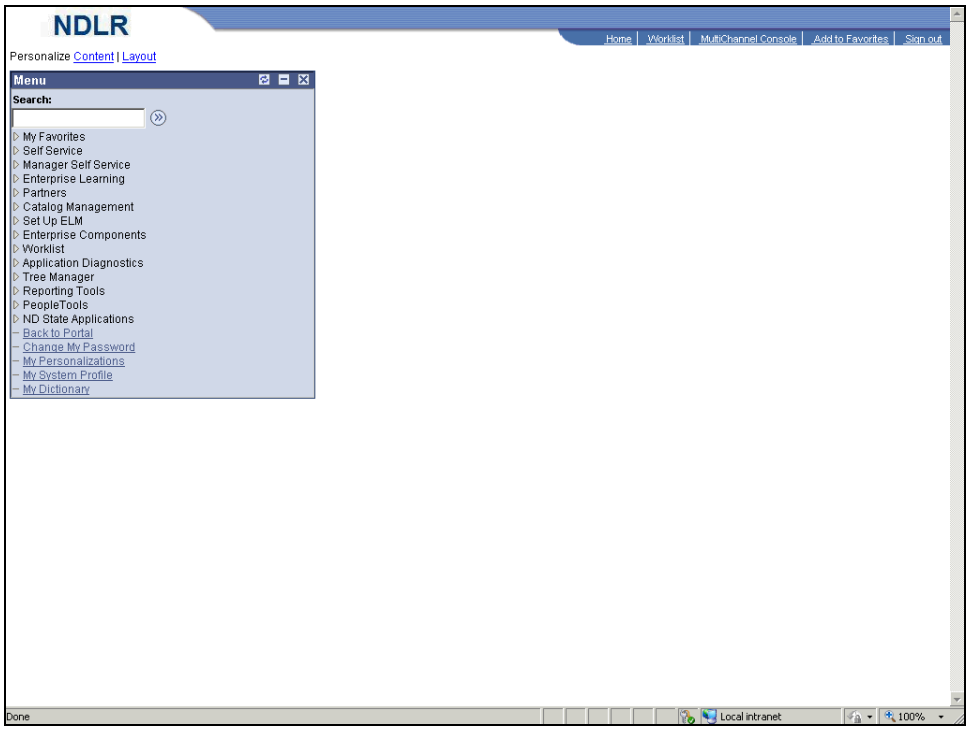
By the end of this topic, you will be able to:

- Navigate to the **Enroll Learners - Find Requesters** page.
- Enroll a learner into an activity.

Step	Action
1.	Begin by navigating to the **Enroll Learners - Find Requesters** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

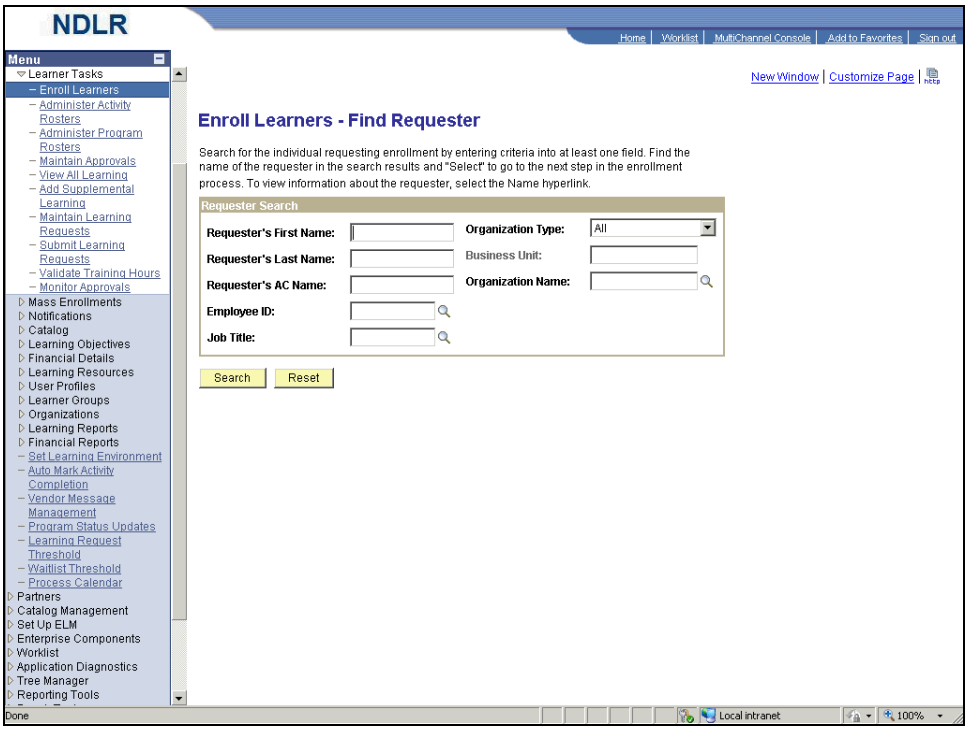


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning



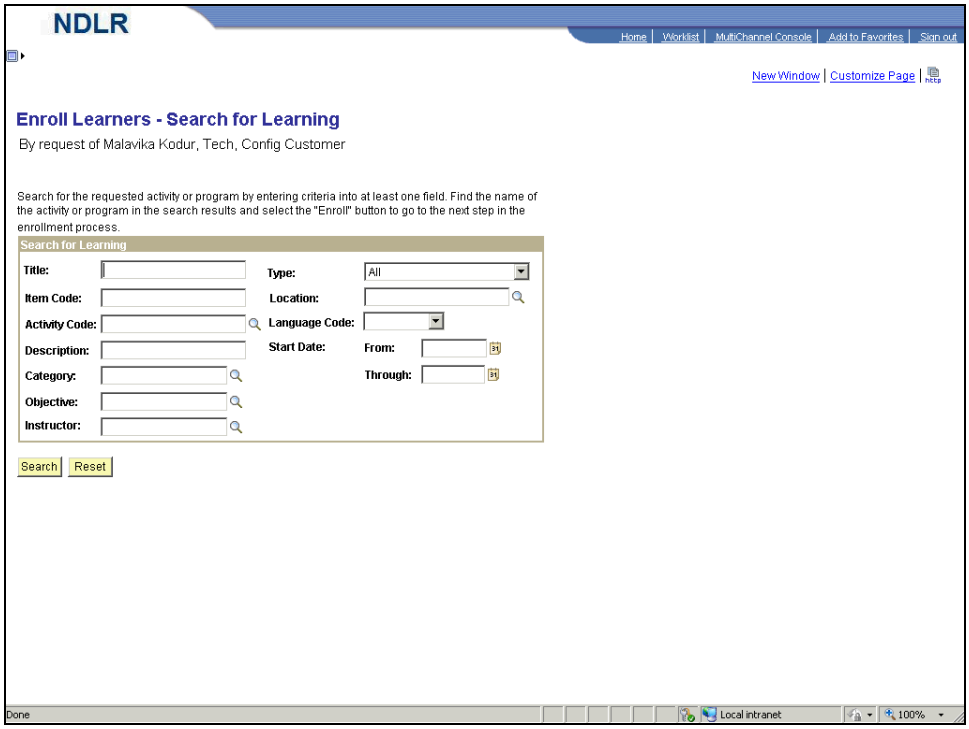
Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Enroll Learners** link. – Enroll Learners

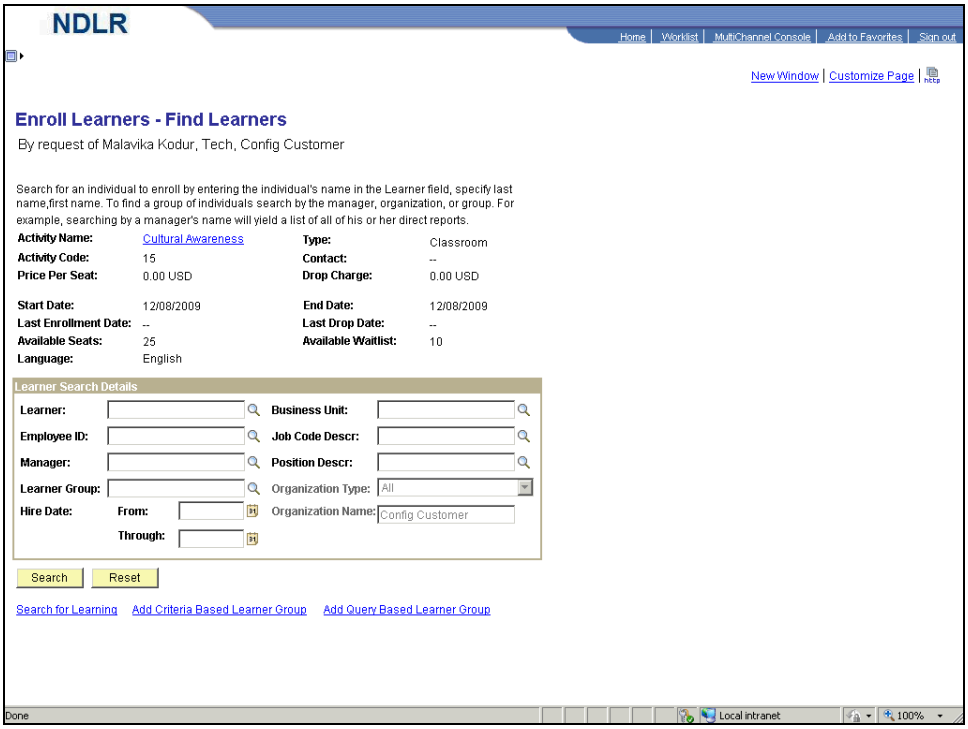


Step	Action
7.	Click the **Collapse Menu** button. ⊟
8.	For this example, search for the person requesting enrollment by entering criteria in the **Requester's First Name** field.
9.	Click in the **Requester's First Name** field.
10.	Enter the desired information into the **Requester's First Name** field. Enter "**Malavika**".
11.	Click the **Search** button. Search

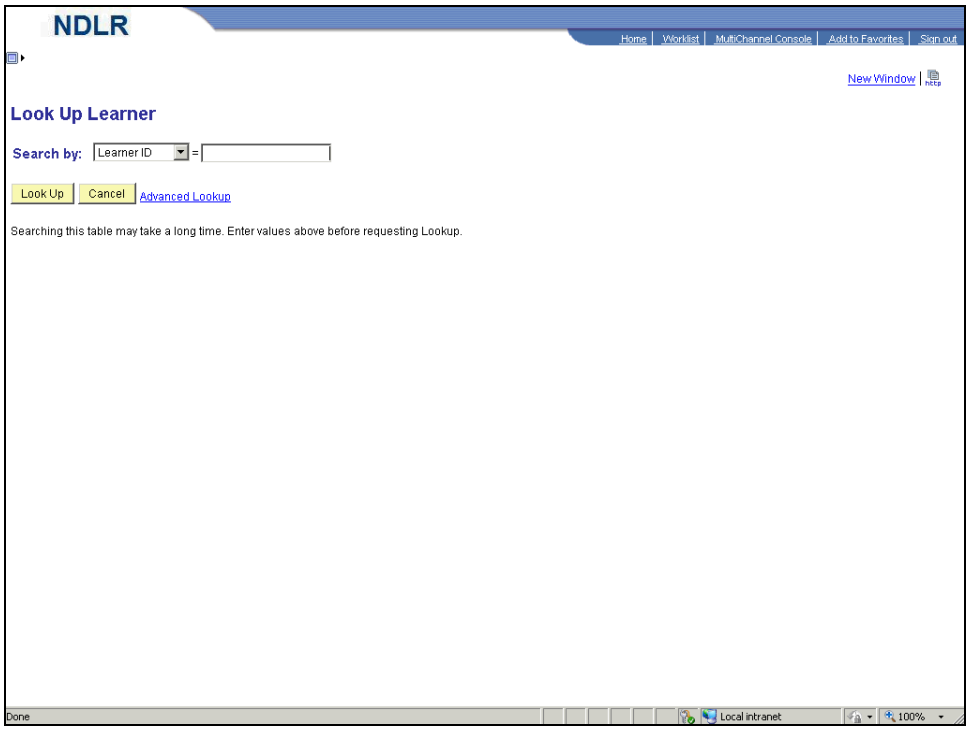
Step	Action
12.	Click the **Select** button. Select
13.	The **Enroll Learners - Search for Learning** page allows you to search for the requested activity or program by entering criteria in one or more of the search criteria fields.



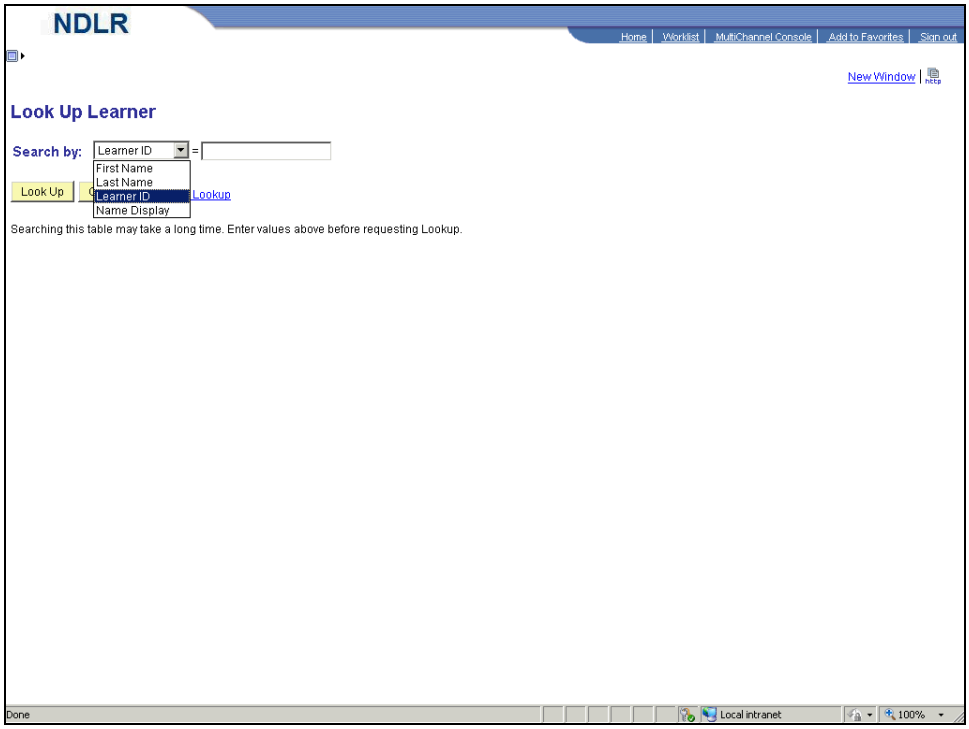
Step	Action
14.	Click in the **Activity Code** field.
15.	Enter the desired information into the **Activity Code** field. Enter "**15**".
16.	Click the **Search** button. Search
17.	Click the **Enroll** button. Enroll
18.	You are now able to view details for the activity, **Cultural Awareness**, that is offered on 12/08/2009 prior to selecting the learner you want to enroll.



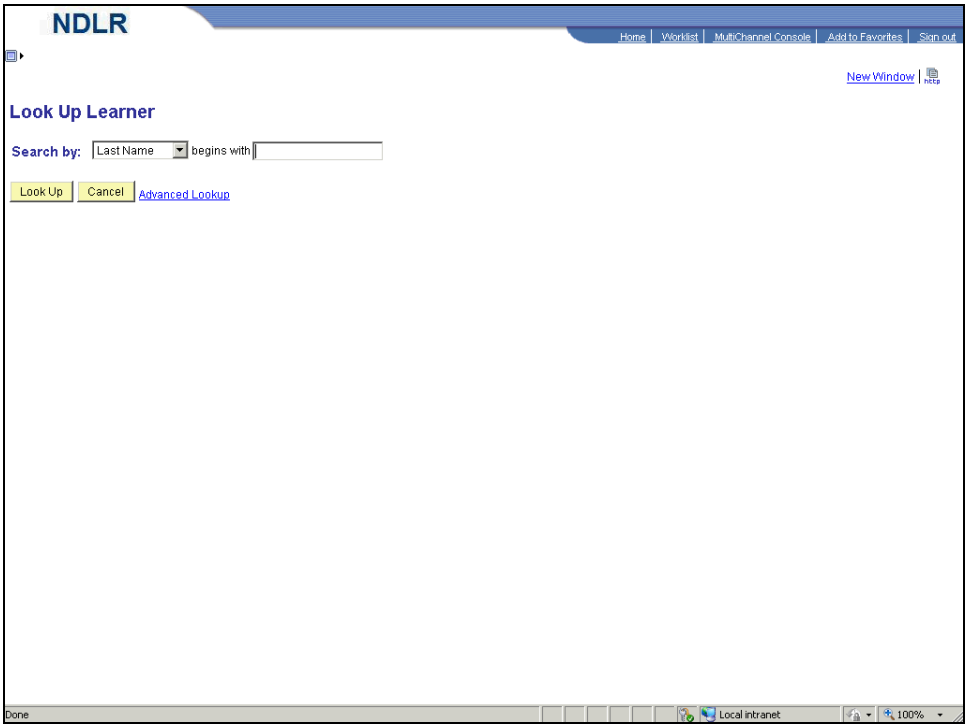
Step	Action
19.	Click the **Learner Lookup** button.



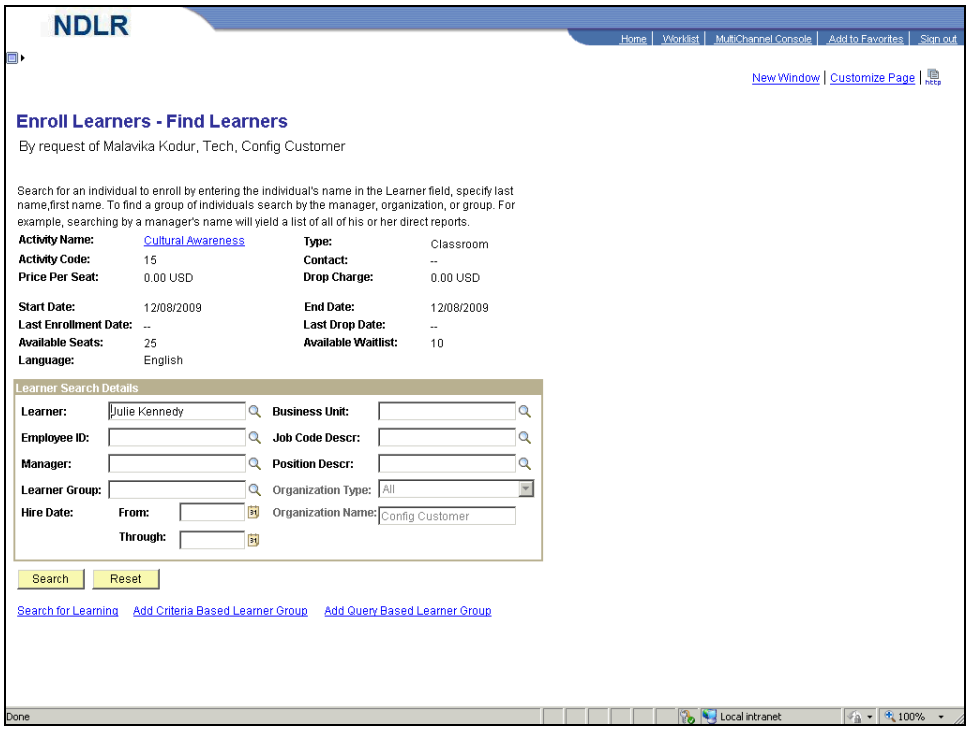
Step	Action
20.	Click the **Search by** drop-down list.



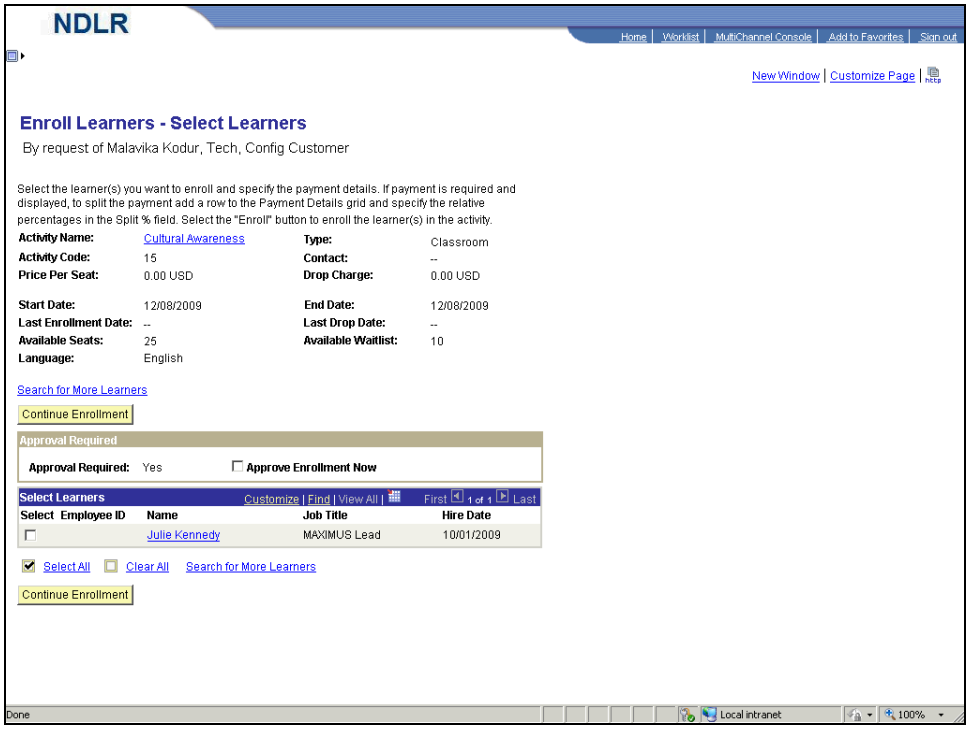
Step	Action
21.	Select the "**Last Name**" list item. Last Name



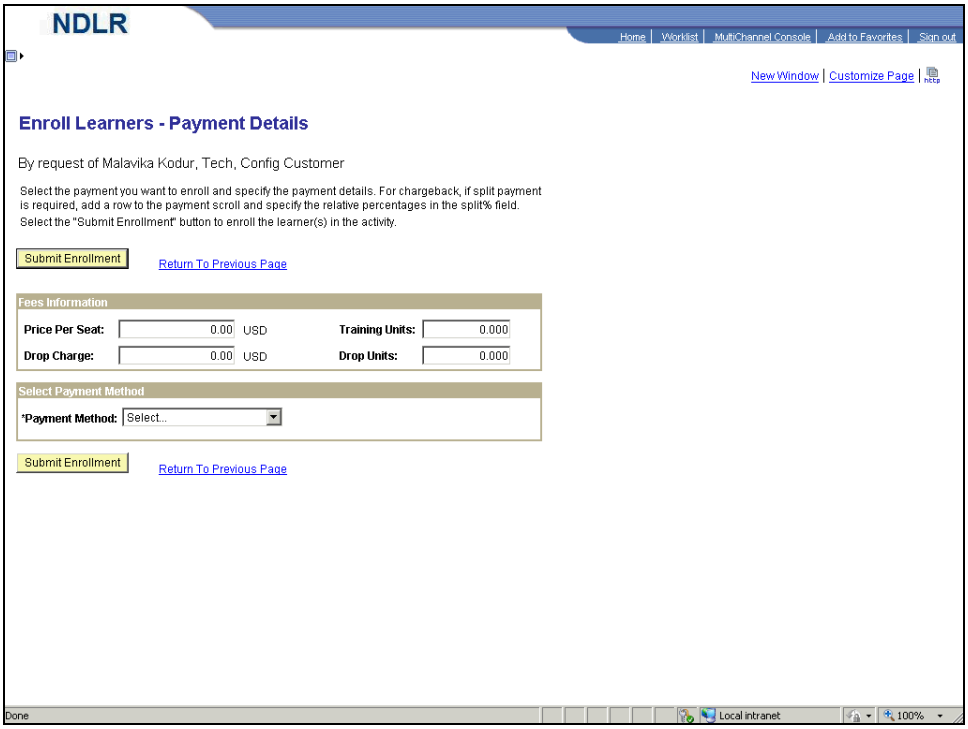
Step	Action
22.	Enter the desired information into the **begins with** field. Enter "**Kennedy**".
23.	Click the **Look Up** button. Look Up
24.	Click the "**Kennedy**" link. Kennedy



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



Step	Action
26.	Click the **Select** option.
27.	The **Search for More Learners** link is used to select additional learners to enroll. For this example, Julie is the only learner you will be enrolling.
28.	Click the **Continue Enrollment** button. Continue Enrollment
29.	If there is a cost associated with an activity, use the **Enroll Learners - Payment Details** page to specify the payment details prior to submitting the enrollment.



Step	Action
30.	Click the **Submit Enrollment** button. Submit Enrollment
31.	Notice Julie Kennedy is now enrolled in the activity: **Cultural Awareness**.
32.	Also, notice the value in the **Available Seats** field has been updated.

Step	Action
33.	**Congratulations**! You should now be able to: - Navigate to the **Enroll Learners - Find Requesters** page. - Enroll a learner into an activity. **End of Procedure.**

7.2 Using Mass Enrollment for Multiple Learners

Depending on your needs, using group enrollment for more than 20 or 30 learners can become time consuming and cumbersome. Mass enrollment provides a more efficient method of handling large volume enrollments. Mass enrollment enables you to submit one request for a large number of learners, and you do not have to wait for the request to complete.

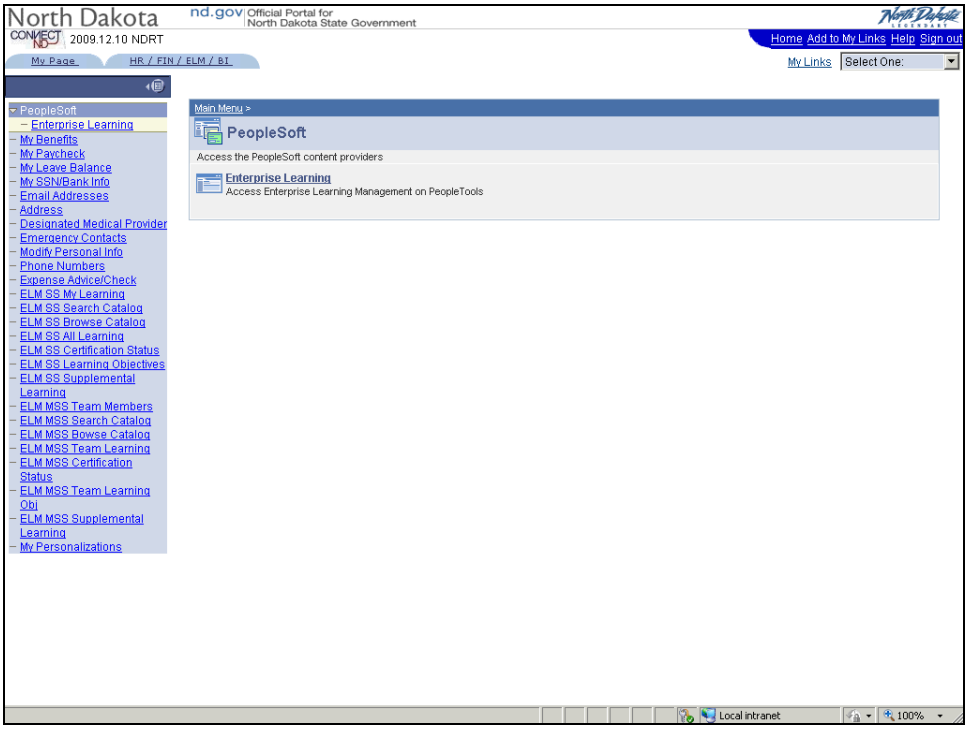
The system triggers the mass enrollment option during a group enrollment when an administrator attempts to enroll or register more learners than the number that you specify in the **Group Enroll Maximum** field on the **Install Defaults - Enrollment** page. In this case, the system prompts the administrator to submit a mass enrollment request or to return to the **Find Learners** page to narrow the search results to remain within the Group Enroll Maximum limit.

Procedure

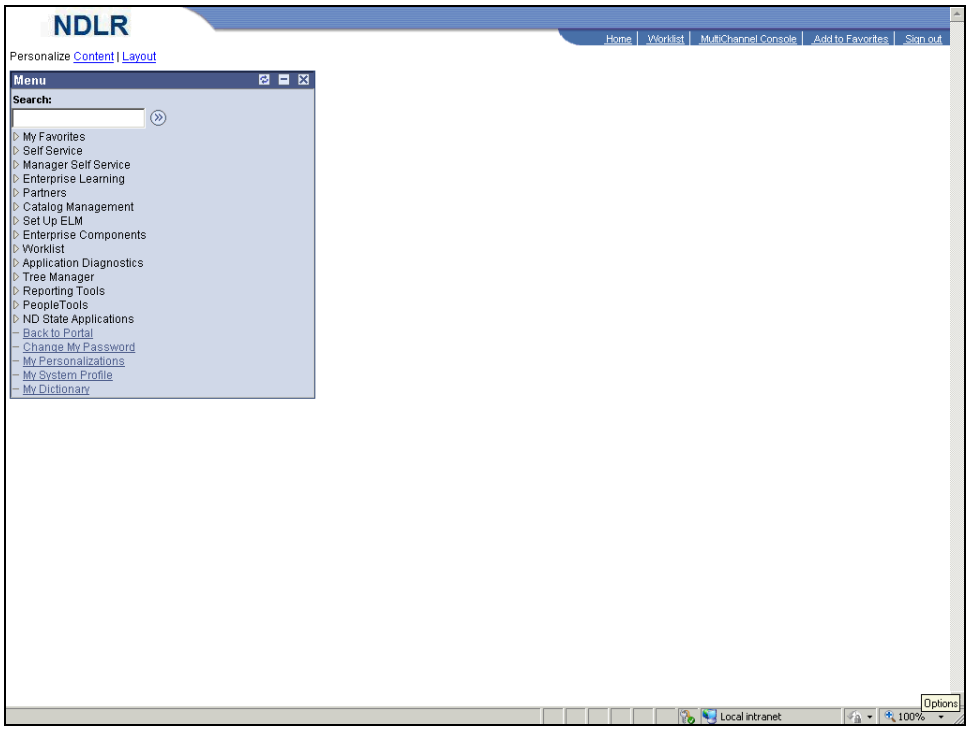
By the end of this topic, you will be able to:

- Navigate to the **Enroll Learners - Find Requester** page.
- Use mass enrollment for multiple learners.

Step	Action
1.	Begin by navigating to the **Enroll Learners - Find Requester** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

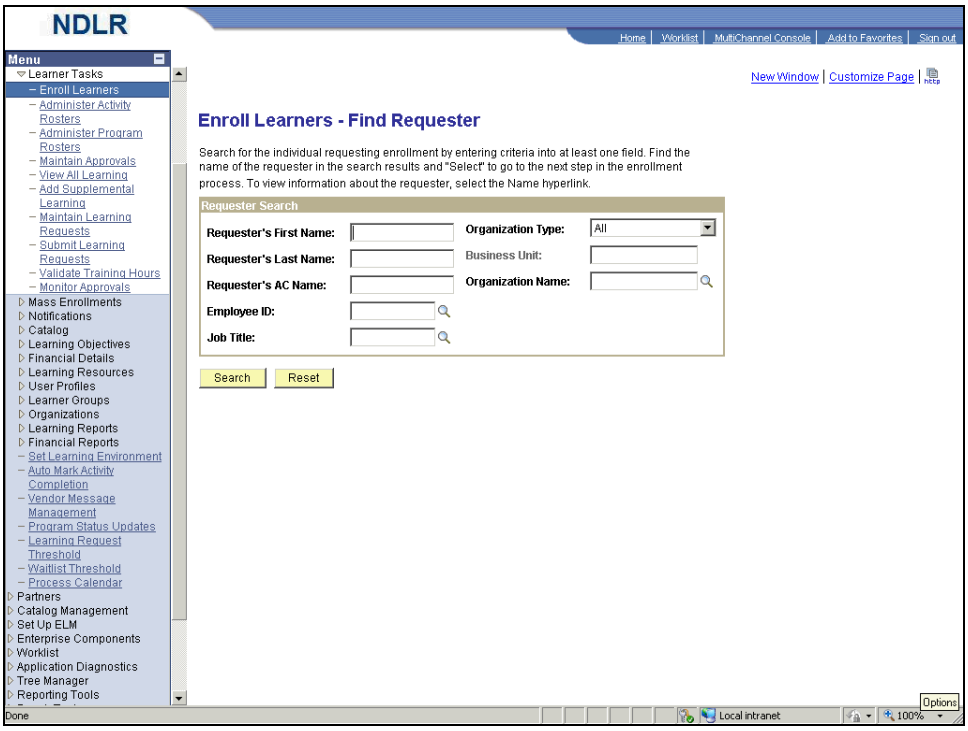


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning



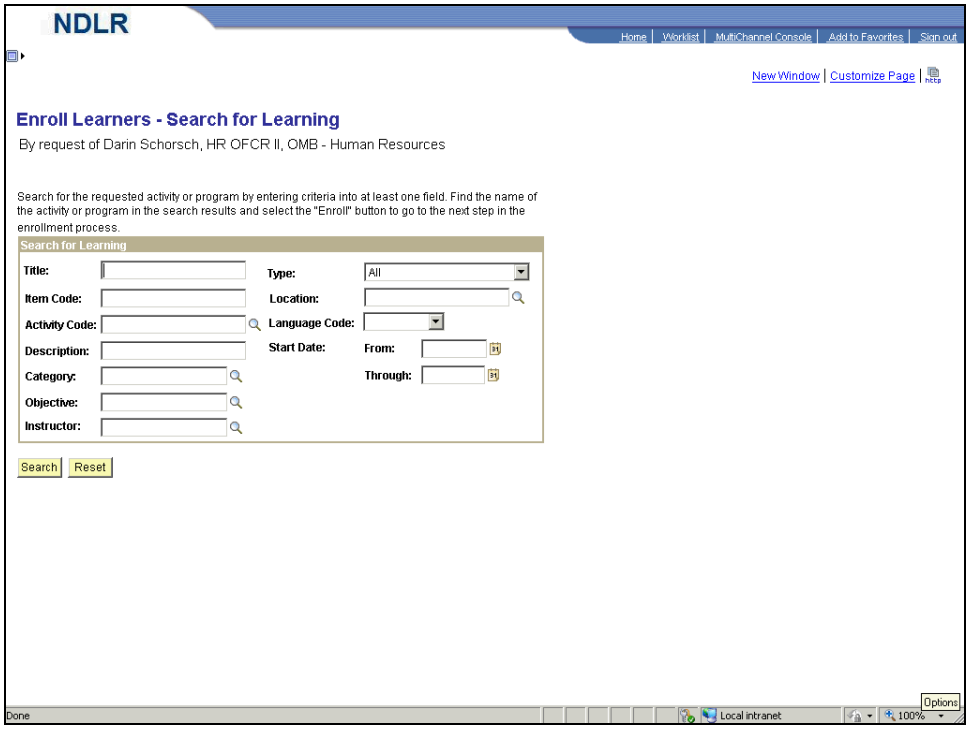
Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Enroll Learners** link. – Enroll Learners

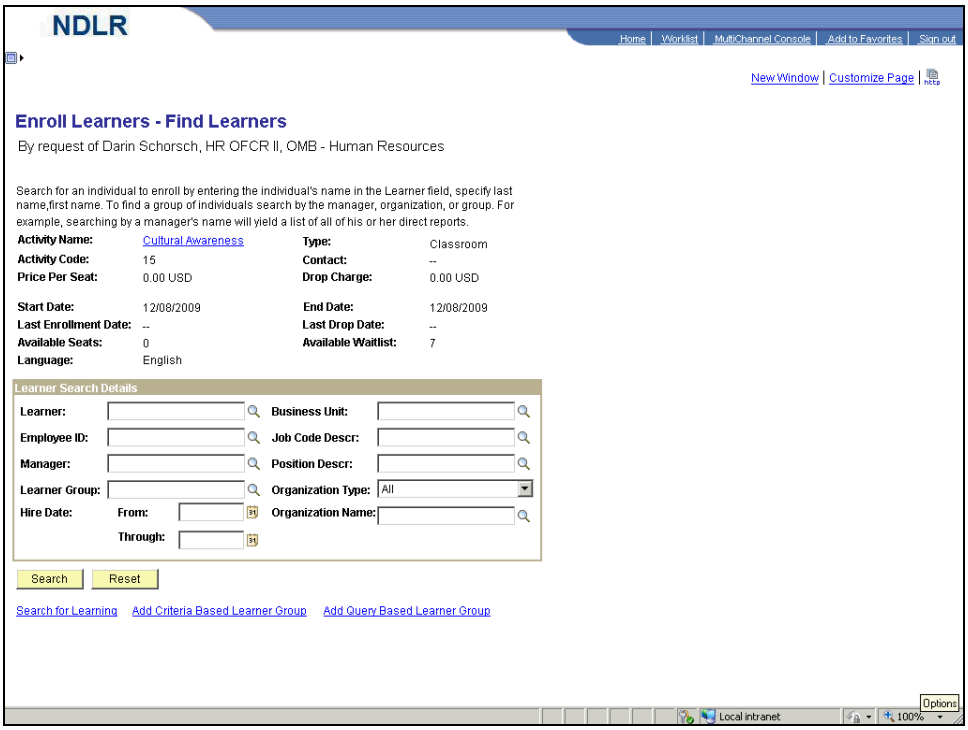


Step	Action
7.	Click the **Collapse Menu** button. ⊟
8.	Click in the **Requester's First Name** field.
9.	Enter the desired information into the **Requester's First Name** field. Enter "**Darin**".
10.	Click the **Search** button. Search
11.	Click the **Show next row** button. ▶

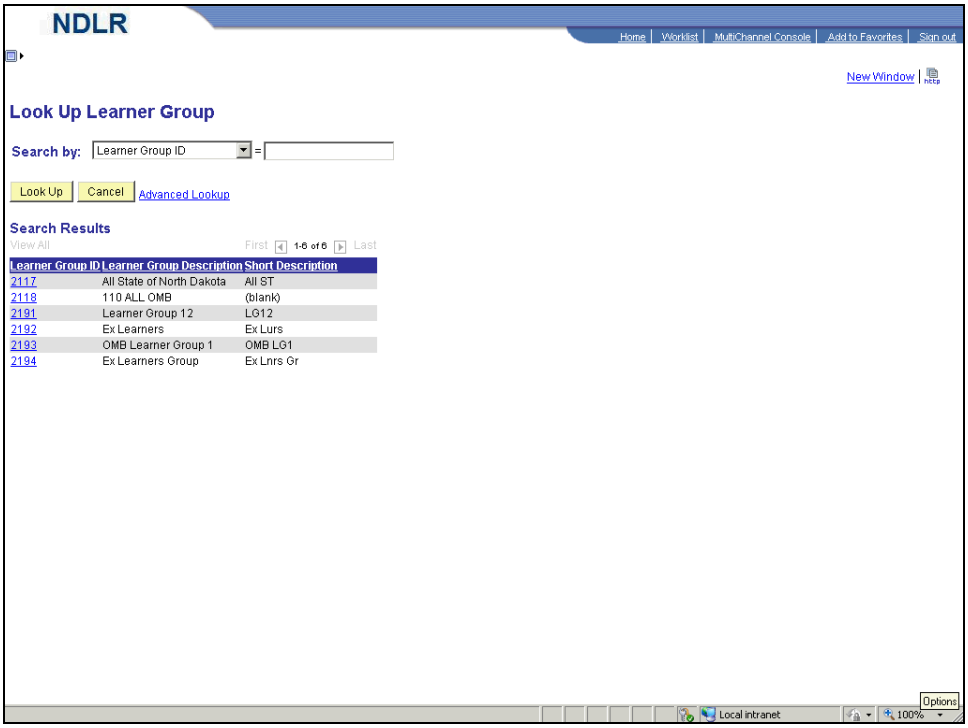
Step	Action
12.	Click the **Select** button. Select
13.	Use the **Enroll Learners - Search for Learning** page to search for and select the requested activity or program.



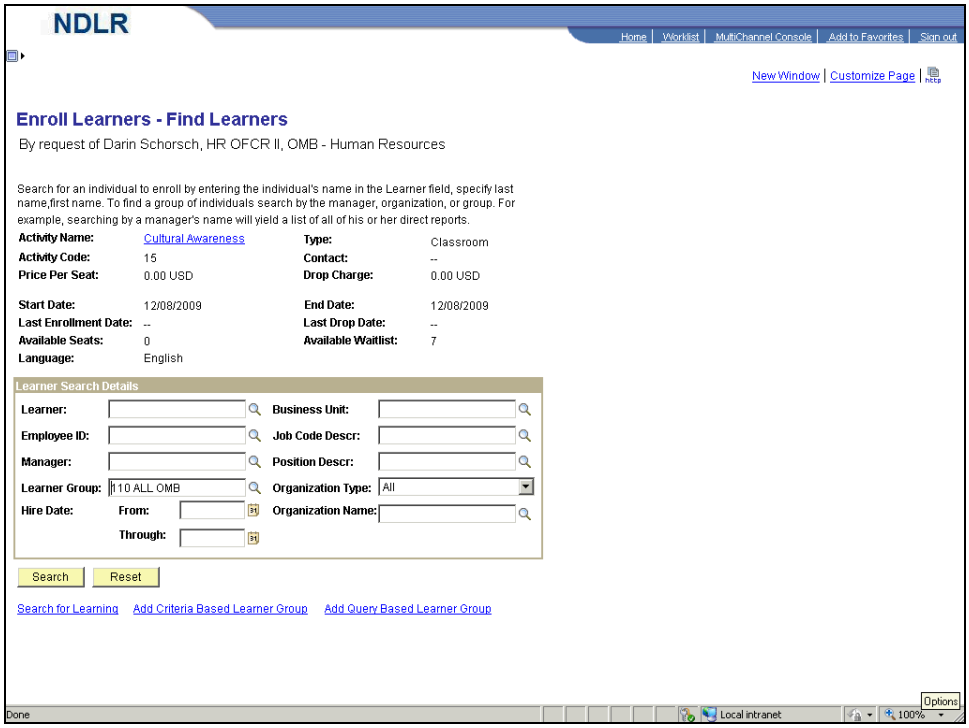
Step	Action
14.	Click in the **Activity Code** field.
15.	Enter the desired information into the **Activity Code** field. Enter "**15**".
16.	Click the **Search** button. Search
17.	Click the **Enroll** button. Enroll
18.	Use the **Enroll Learners - Find Learners** page to confirm that you selected the correct activity or program and to search for a specific learner(s).



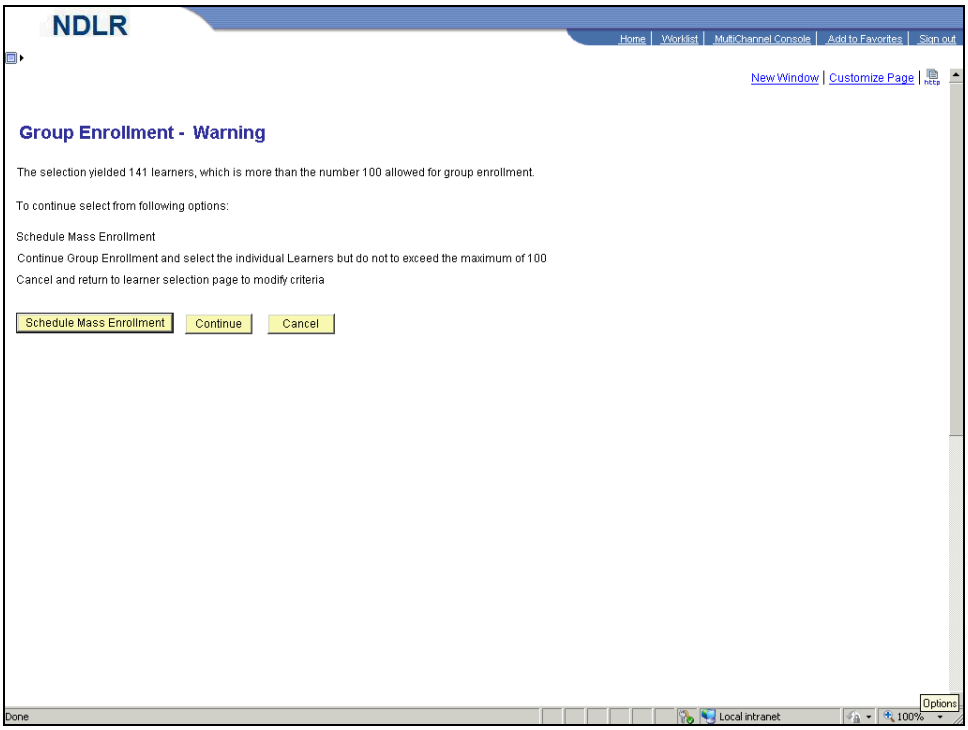
Step	Action
19.	Click the **Learner Group Lookup** button.

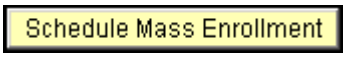


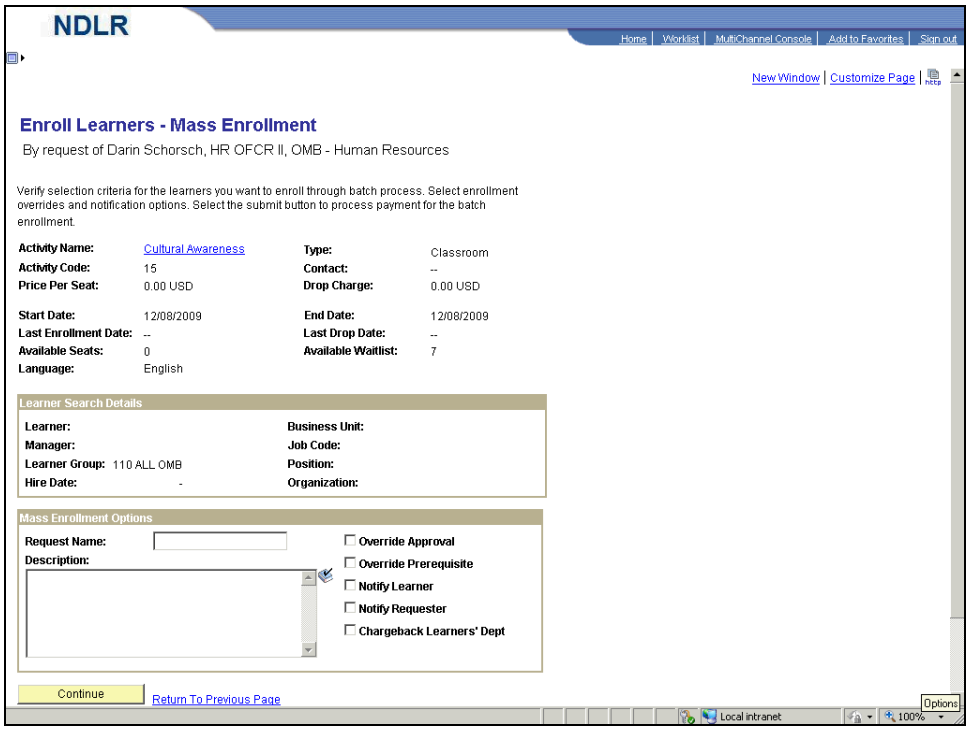
Step	Action
20.	Select the "**2118**" link. 2118



Step	Action
21.	Click the **Search** button. Search
22.	Use the **Group Enrollment - Warning** page to initiate a mass enrollment request.

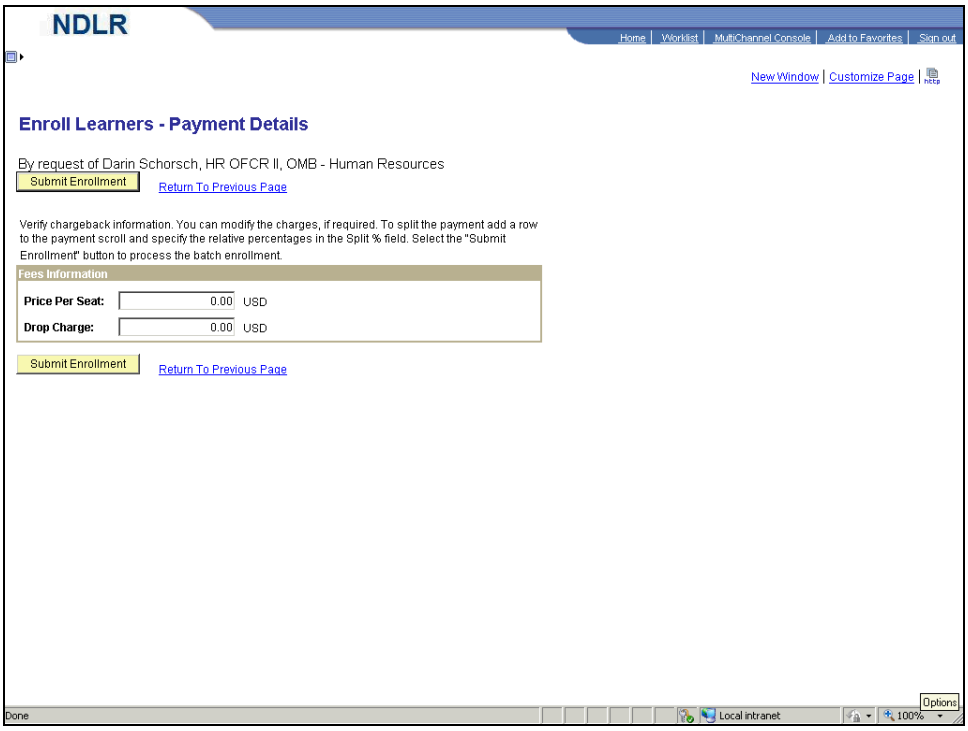


Step	Action
23.	Click the **Schedule Mass Enrollment** button. 
24.	Use the **Enroll Learners - Mass Enrollment** page to select the override and notification options to use during the mass enrollment process.
25.	Enter the name of the mass enrollment request. This value appears in the **Description** column on the **Mass Enrollment Requests** page. It is recommended that you enter an recognizable label. This helps you to identify the request when you review the requests later.



Step	Action
26.	Click in the **Request Name** field.
27.	Enter the desired information into the **Request Name** field. Enter "**Cultural Awareness**".
28.	Enter a description of the mass enrollment request. The system displays the information that you enter on the **Review Mass Enrollment** report.
29.	Click in the **Description** field.
30.	Enter the desired information into the **Description** field. Enter "**Cultural Awareness**".
31.	Use the **Notify Learner** option to send an email notification to all learners whose enrollment or registration fails (the system automatically sends email notifications to all learners that are enrolled or registered successfully). The system generates an email that gets queued to be sent to the learner informing them of their enrollment status.
32.	Click the **Notify Learner** option.

Step	Action
33.	Use the **Notify Requester** option to send an email notification to the requester upon completion of the process. The notification includes how many learners are successfully and unsuccessfully enrolled or registered. The system generates an email that gets queued to be sent to the requester. The email provides teh requester with the total number of successful and unsuccessful enrollments or registrations.
34.	Click the **Notify Requester** option.
35.	Use the **Chargeback Learners' Dept** option to use each learner's chargeback information, rather than use the requester's chargeback information for all learners.
36.	Click the **Chargeback Learners' Dept** option.
37.	Click the scrollbar.
38.	Click the **Continue** button. Continue
39.	Use the **Enroll Learners - Payment Details** page to review and update payment information, if applicable.



Step	Action
40.	Click the **Submit Enrollment** button. Submit Enrollment
41.	The enrollment confirmation ID appears at the bottom of the page after clicking the **Submit Enrollment** button.
42.	**Congratulations**! You should now be able to: - Navigate to the **Enroll Learners - Find Requester** page. - Use mass enrollment for multiple learners. **End of Procedure.**

7.3 Enrolling Learners into an Activity with a Waitlist

Administrators can browse or search the catalog for activities and programs in which to enroll and register any team member within the organizational hierarchy. Administrators have the ability to add activities to employees' learning plans and enroll employees in the planned activities at a later time. Administrators can enroll and register small groups of learners through group enrollment and large groups of learners through mass enrollment.

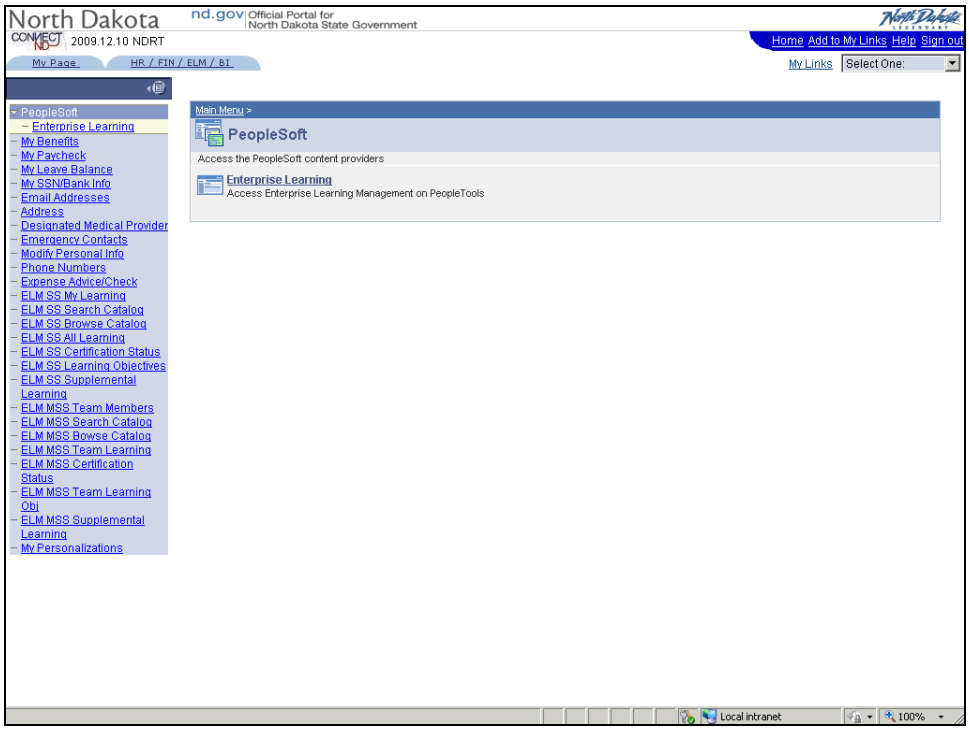
Activities can have a capacity limit. When the capacity limit is reached, the system can automatically create a waitlist. If an enrolled learner drops enrollment in the activity, the system enrolls the first person on the waitlist automatically.

Procedure

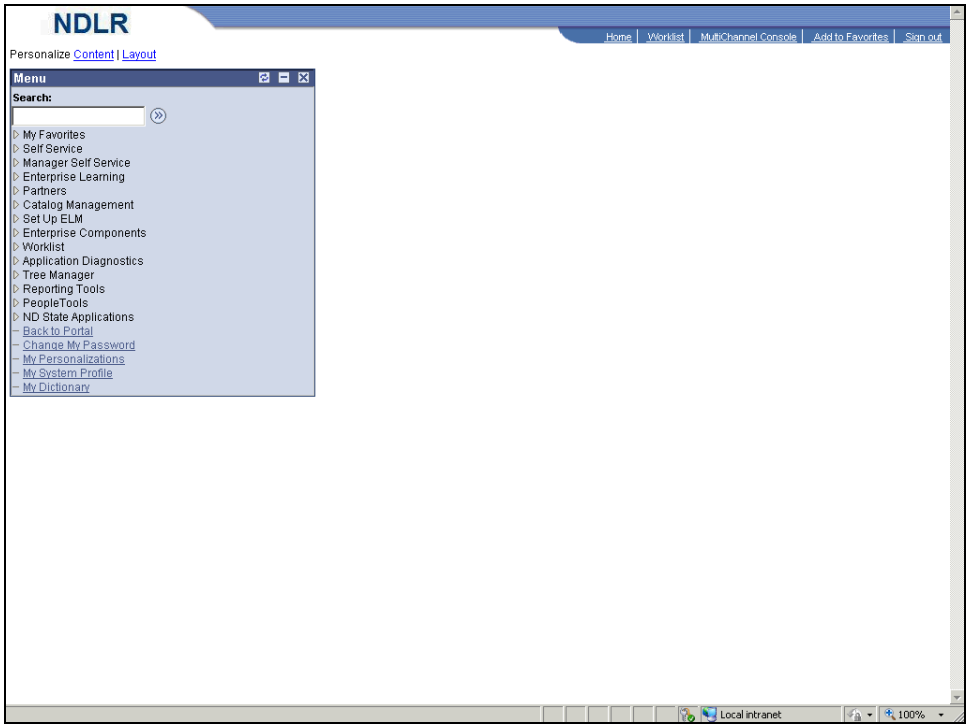
By the end of this topic, you should be able to:

- Navigate to the **Enroll Learners - Find Requester** page.
- Enroll learners into an activity with a waitlist.

Step	Action
1.	Begin by navigating to the **Enroll Learners - Find Requester** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

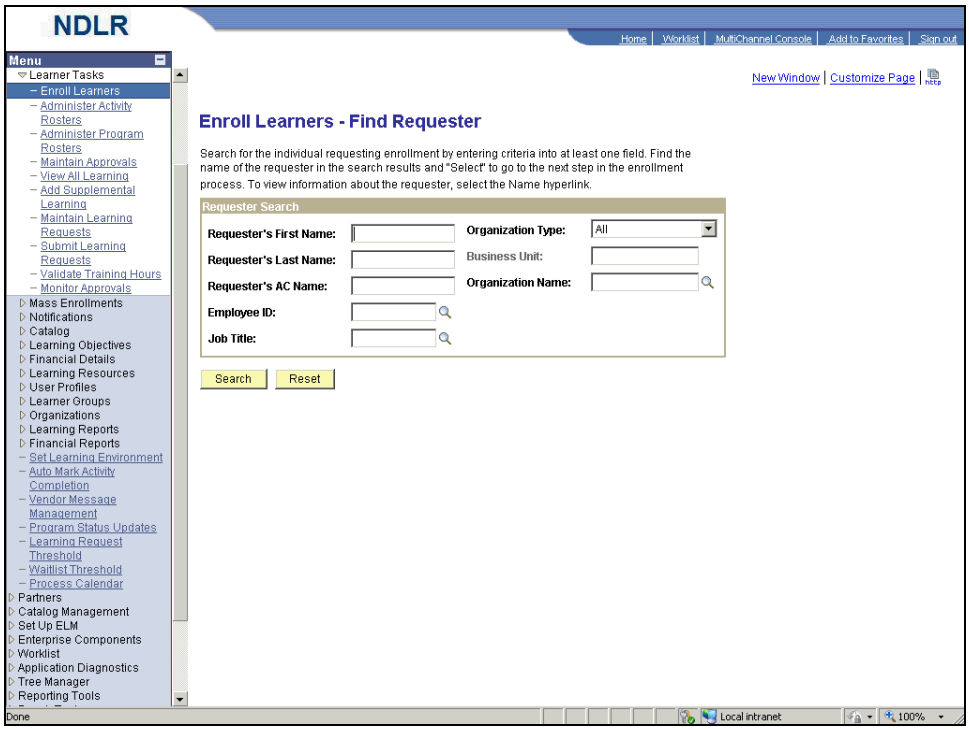


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

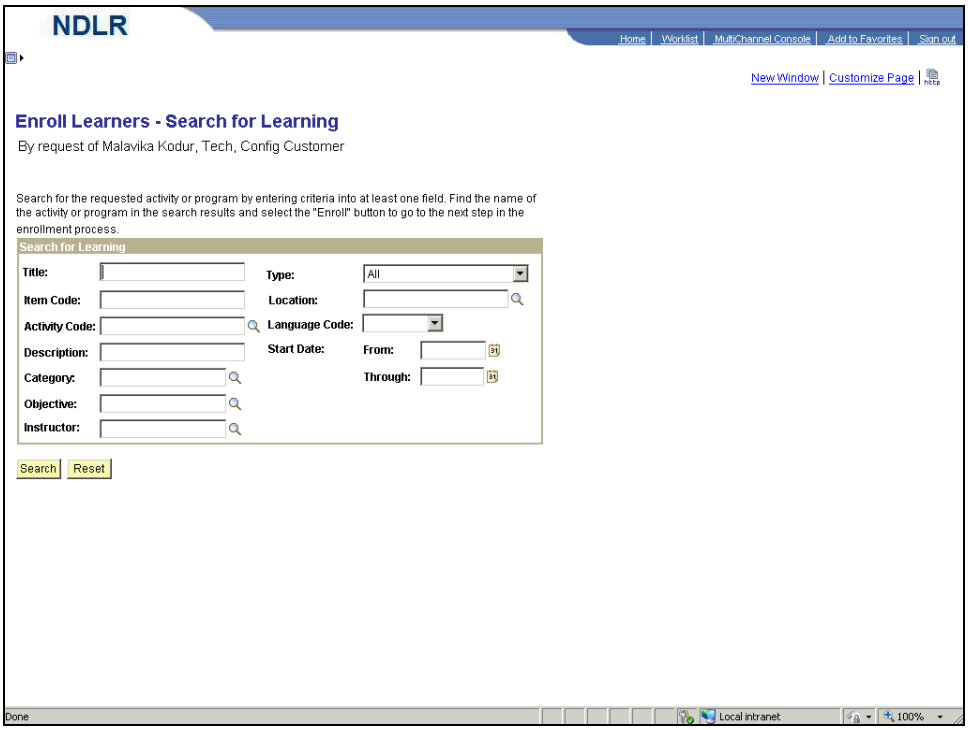


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

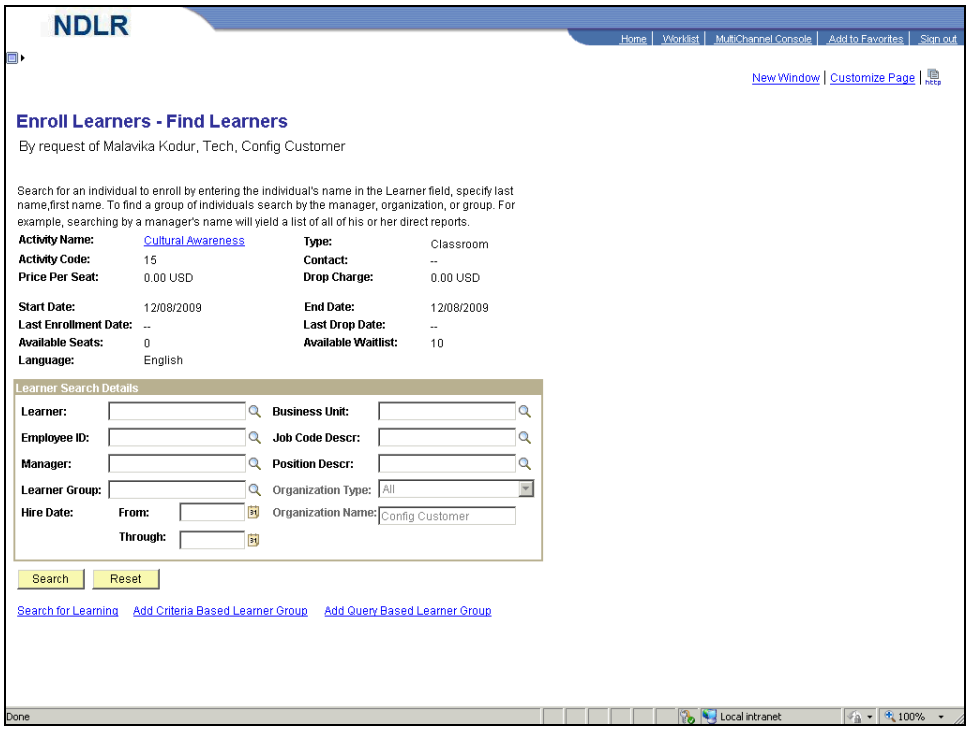
Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Enroll Learners** link. – Enroll Learners



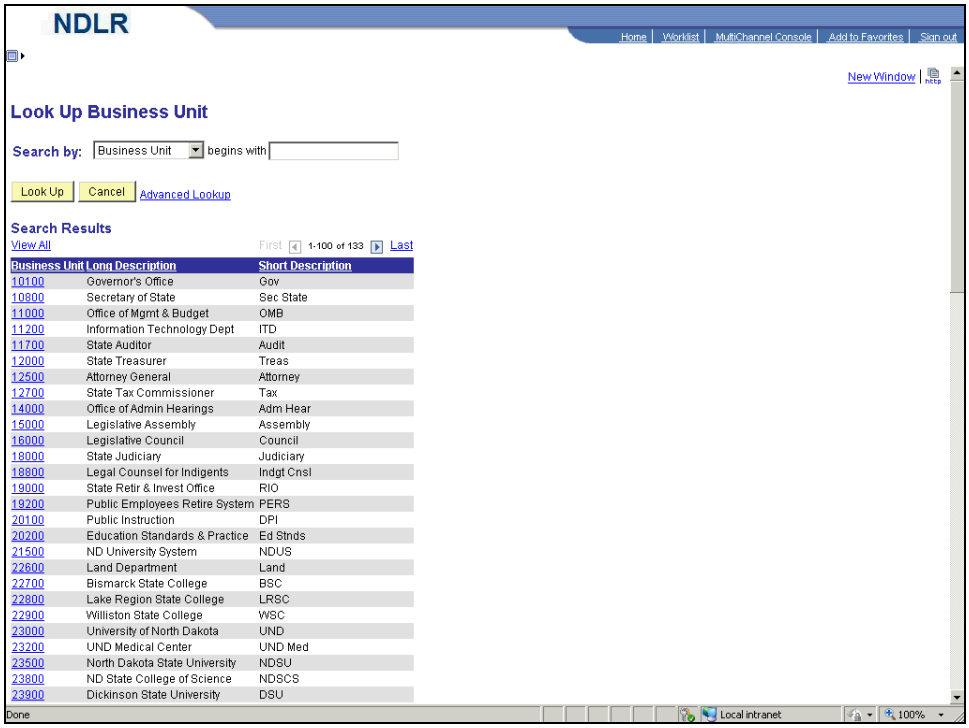
Step	Action
7.	Click the **Collapse Menu** button.
8.	For this example, search for the person requesting enrollment by entering criteria in the **Requester's First Name** field.
9.	Click in the **Requester's First Name** field.
10.	Enter the desired information into the **Requester's First Name** field. Enter "**Malavika**".
11.	Click the **Search** button.
12.	Click the **Select** button.
13.	The **Enroll Learners - Search for Learning** page allows you to search for the requested activity or program by entering criteria in one or more of the search criteria fields



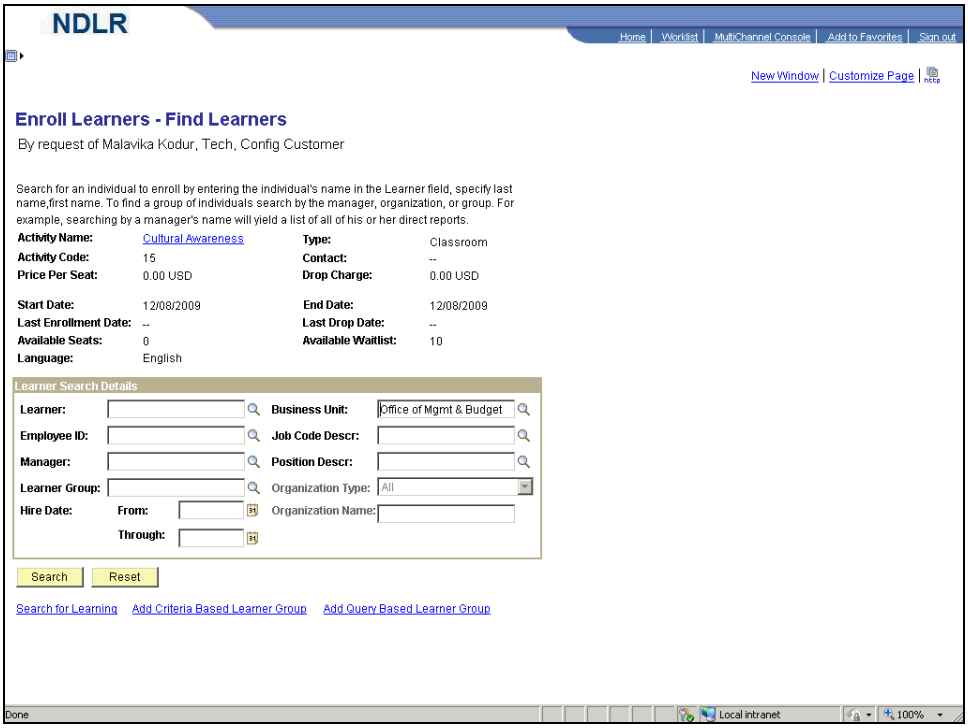
Step	Action
14.	Click in the **Activity Code** field.
15.	Enter the desired information into the **Activity Code** field. Enter "**15**".
16.	Click the **Search** button. Search
17.	Click the **Enroll** button. Enroll
18.	You are now able to view details for the activity, **Cultural Awareness**, that is offered on 12/08/2009.
19.	Notice, there are no available seats for this activity. However, this activity permits a maximum of 10 people to be placed on the waitlist.



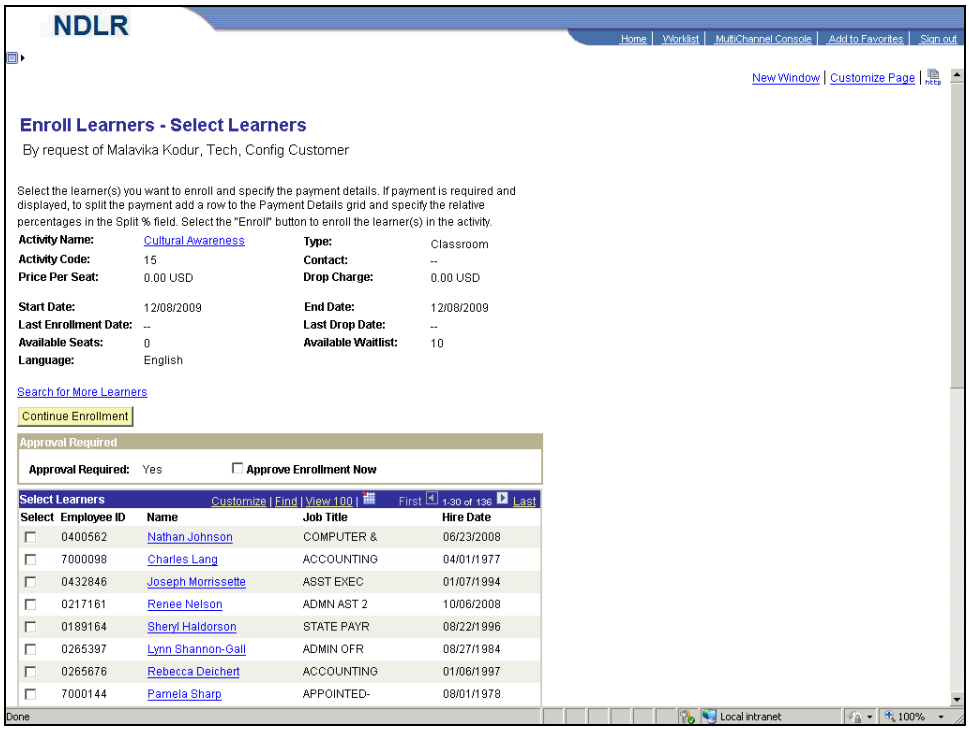
Step	Action
20.	Click the **Business Unit Lookup** button.



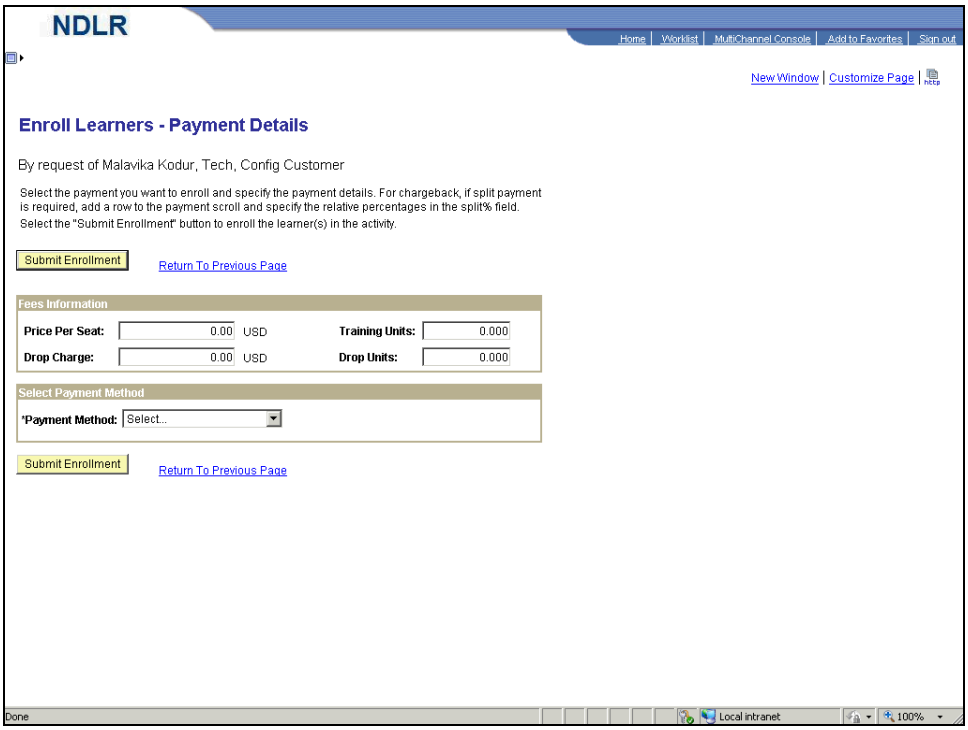
Step	Action
21.	Click the "**11000**" link. 11000



Step	Action
22.	Click the **Search** button. Search
23.	Use the **Enroll Learners - Select Learners** page to identify and select the learners you want to enroll.



Step	Action
24.	Click the **Select** option for Nathan Johnson.
25.	Click the **Select** option for Charles Lang.
26.	Click the **Continue Enrollment** button. Continue Enrollment



Step	Action
27.	Click the **Submit Enrollment** button. Submit Enrollment
28.	Both learners have been successfully placed on the waitlist for the activity: **Cultural Awareness**.
29.	Notice the value in the **Available Waitlist** field has been updated.
30.	Congratulations! You should now be able to: - Navigate to the **Enroll Learners - Find Requester** page. - Enroll a learner into an activity with a waitlist. **End of Procedure.**

7.4 Modifying a Waitlist

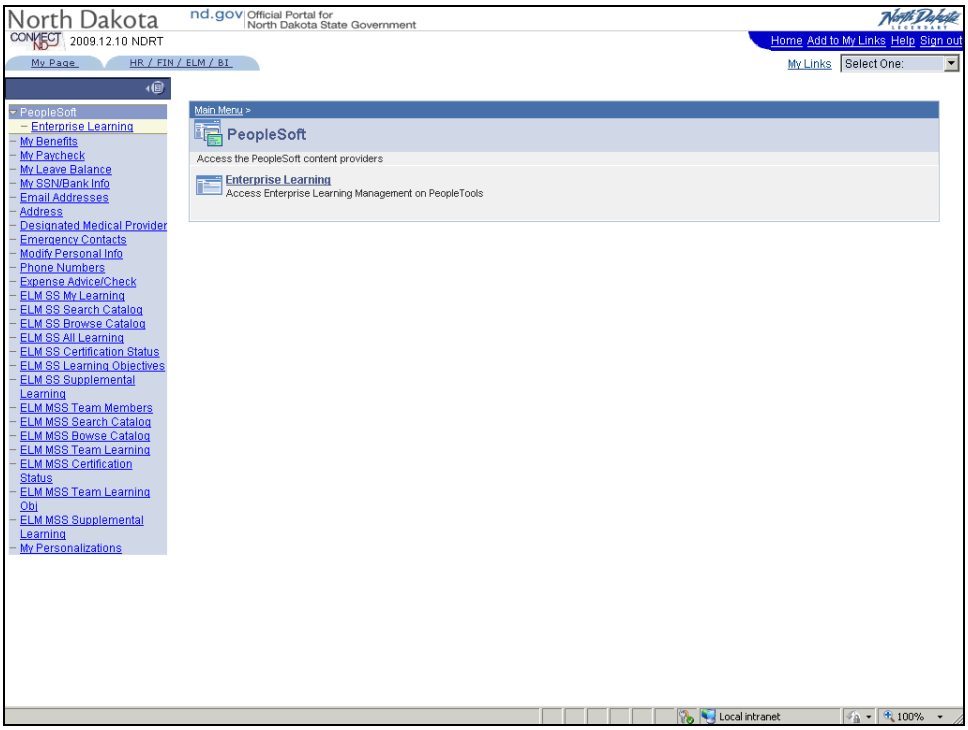
Learning Administrators have the ability to modify waitlists. For example, if a learner is number three on the waitlist, a learning administrator can open the roster and move them up to number one or two on the waitlist.

Procedure

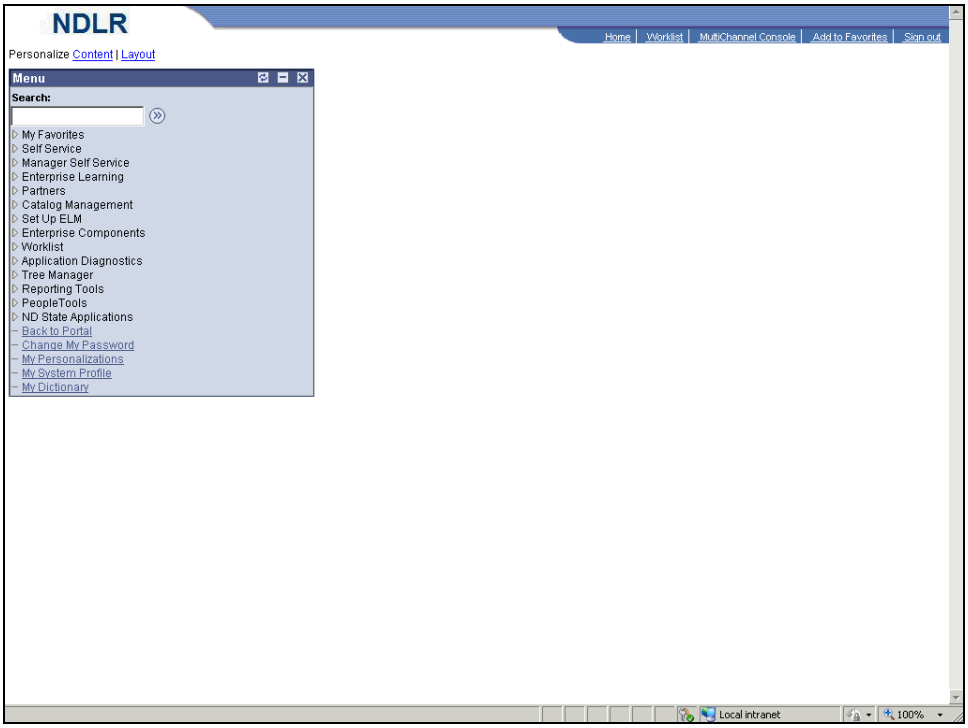
By the end of this topic, you should be able to:

- Navigate to the **Administer Activity Roster** page.
- Modify an activity with a waitlist.

Step	Action
1.	Begin by navigating to the **Administer Activity Roster** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

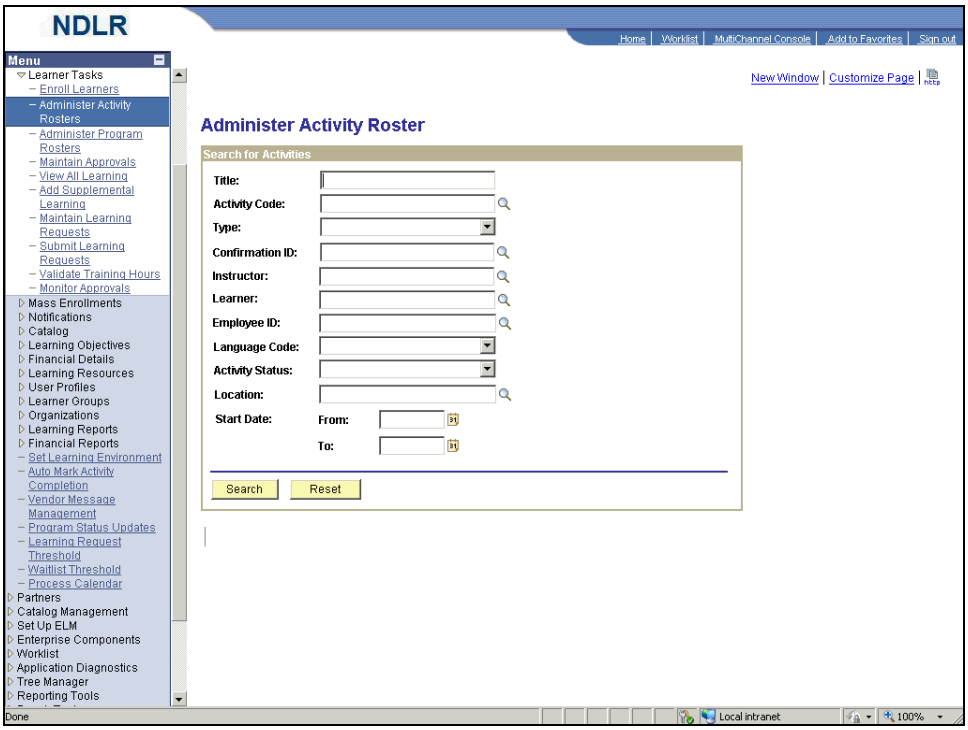


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning



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

Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Administer Activity Rosters** link.



Step	Action
7.	Click the **Collapse Menu** button.
8.	The **Administer Activity Roster** page will allow you to search for an **Activity Roster** using one or more of the search criteria fields. In this example, you will be searching by Activity Code.
9.	Click in the **Activity Code** field.
10.	Enter the desired information into the **Activity Code** field. Enter "**15**".
11.	Click the **Search** button. Search
12.	Click the **Roster** button. Roster
13.	View the activity details for the activity: **Cultural Awareness**.

Step	Action
14.	Click the scroll bar.
15.	Click the scroll bar.
16.	Now, you will switch the **Waitlist Priority** for learners Julie Kennedy and Malavika Kodur.
17.	Click in the **Waitlist Priority** field. 3
18.	Press **[Delete]**.
19.	Enter the desired information into the **Waitlist Priority** field. Enter "**1**".
20.	Click in the **Waitlist Priority** field. 1
21.	Press **[Delete]**.
22.	Enter the desired information into the **Waitlist Priority** field. Enter "**3**".
23.	Click the **Save** link. Save
24.	The roster for waitlisted learners has been updated for the activity: **Cultural Awareness**.

Step	Action
25.	**Congratulations**! You should now be able to: - Navigate to the **Administer Activity Roster** page. - Modify an activity with a waitlist. **End of Procedure.**

7.5 Enrolling Learners in an Activity using Reserved Seats

There may be times when Learning Administrators may know in advance they will need to enroll 15 learners in an activity, but may not know the names of all the prospective learners. The ELM system will allow Learning Administrators to reserve a specified number of seats.

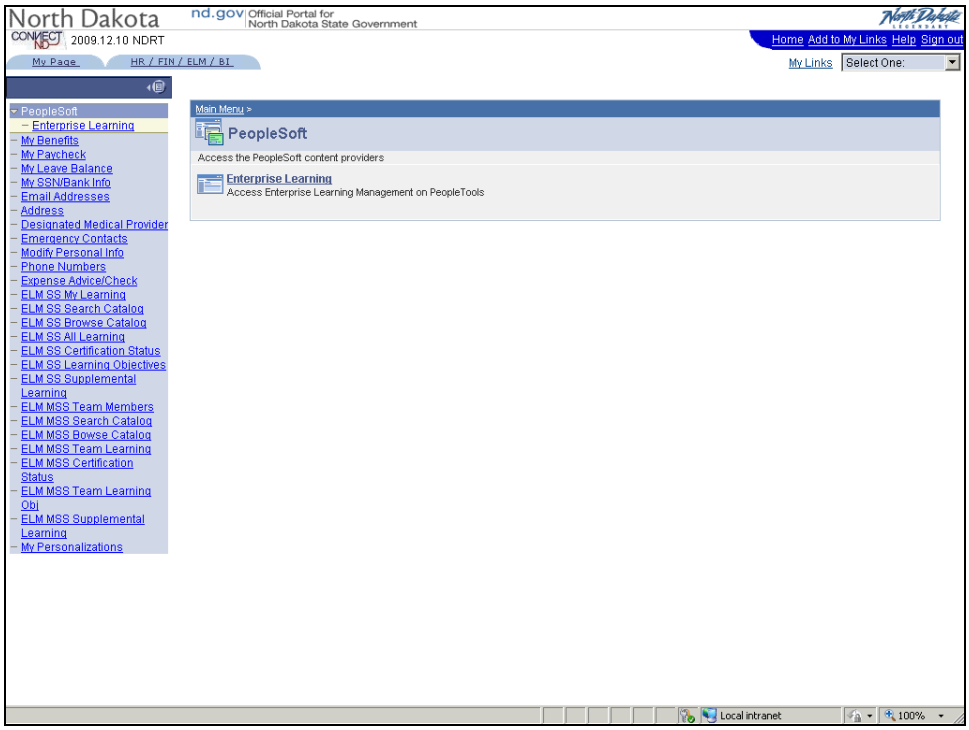
Procedure

By the end of this topic, you should be able to:

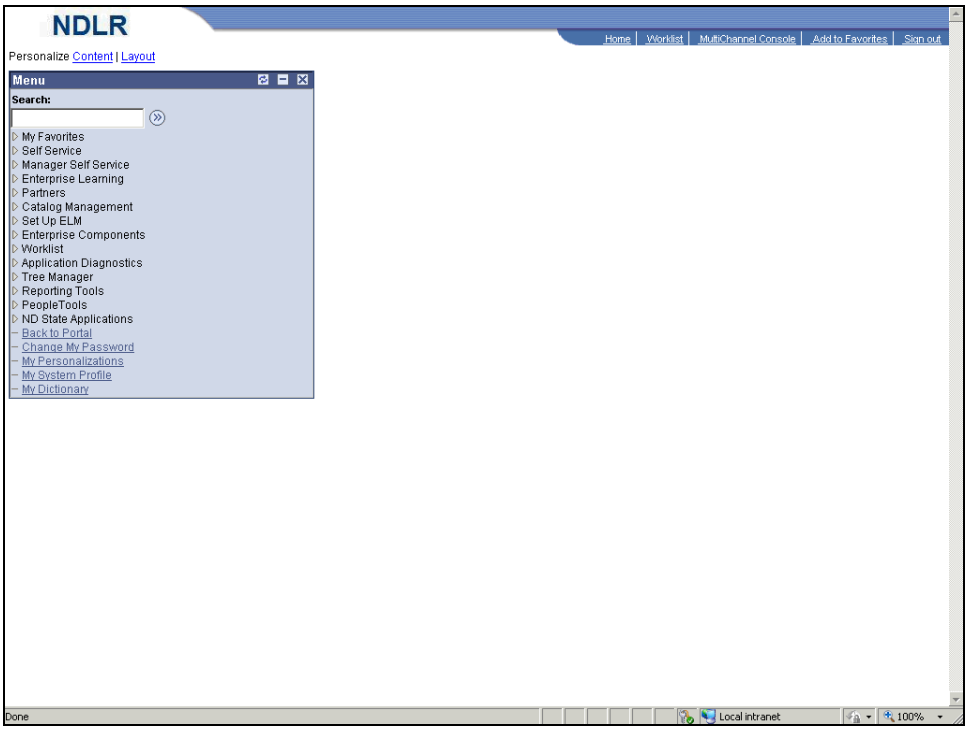
- Navigate to the **Enroll Learners - Find Requester** page.
- Enroll learners into an activity using reserved seats.

Step	Action
1.	Begin by navigating to the **Enroll Learners - Find Requester** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI

Step	Action
2.	Click the **PeopleSoft** link. PeopleSoft

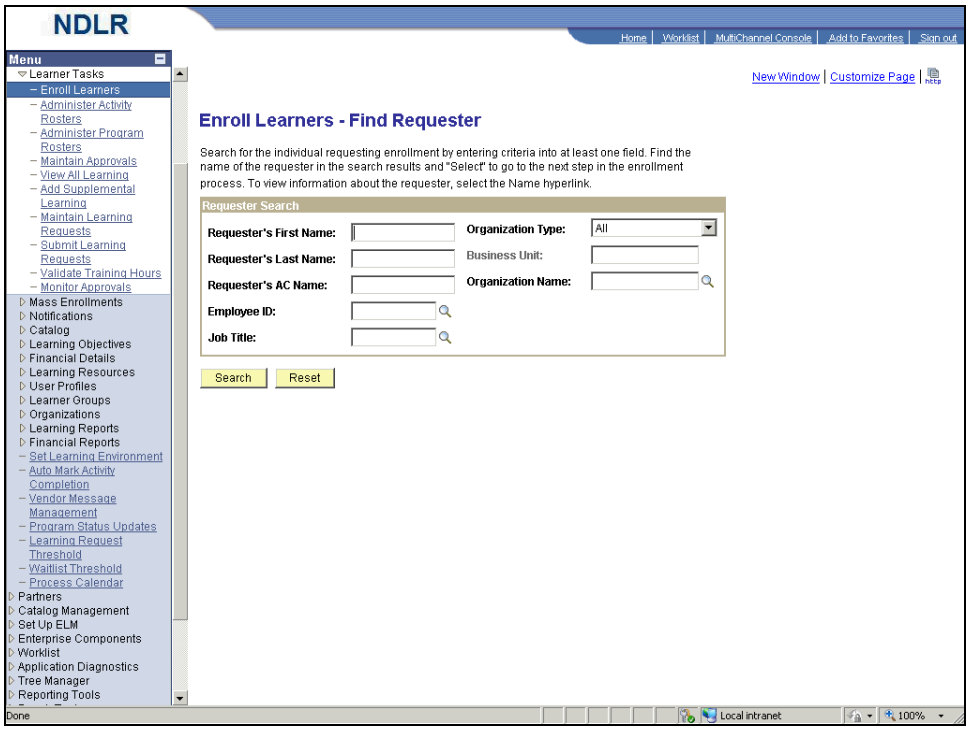


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning



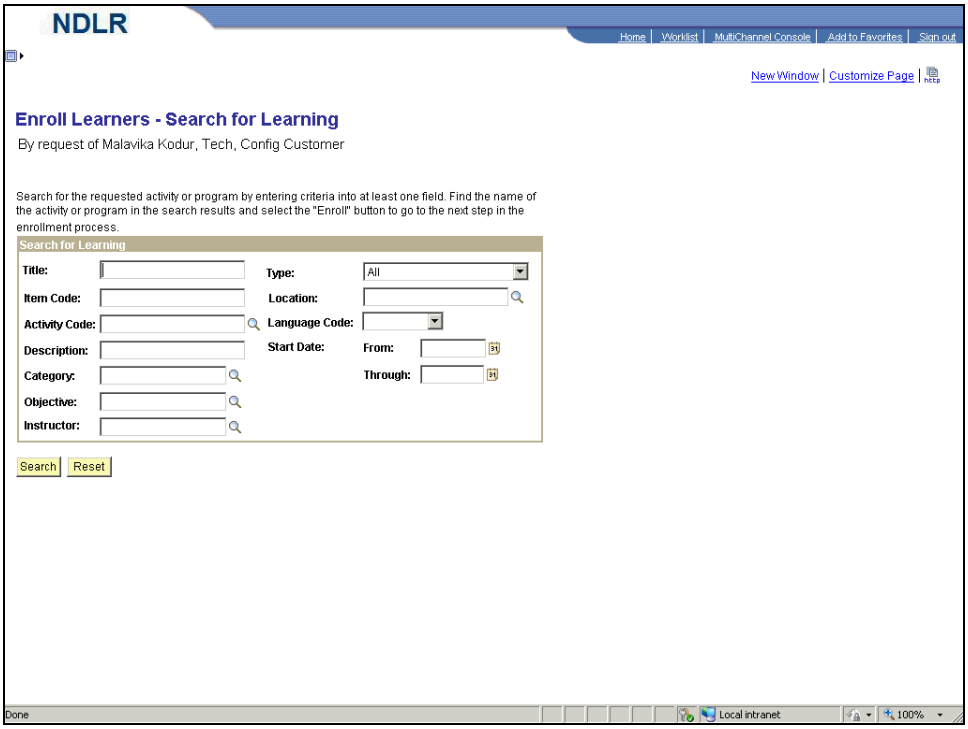
Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Enroll Learners** link. – Enroll Learners

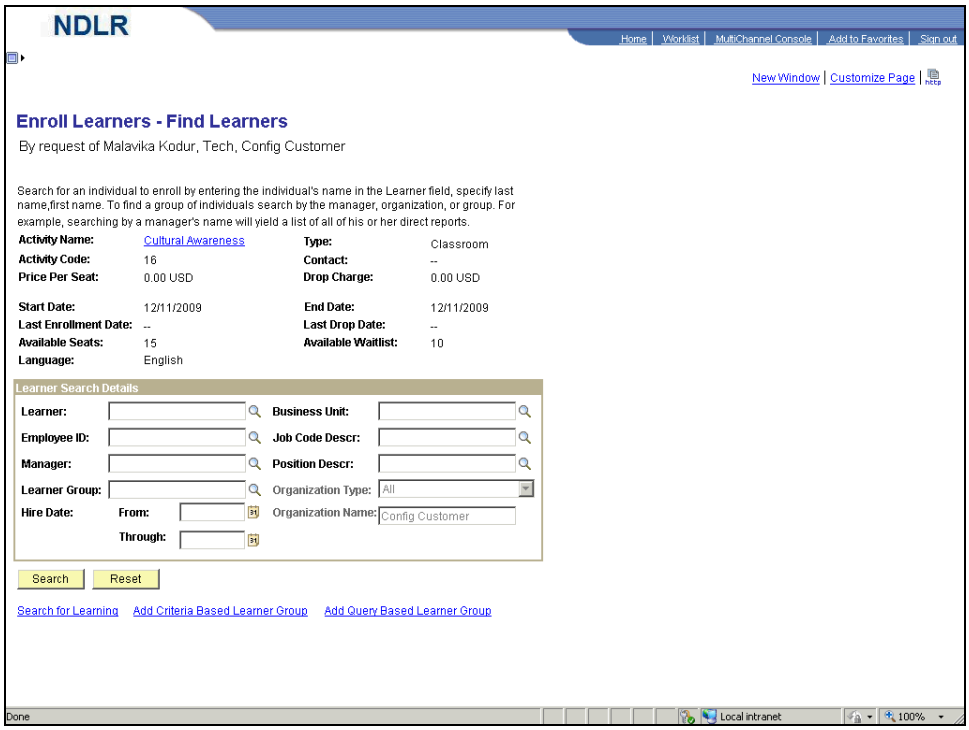


Step	Action
7.	Click the **Collapse Menu** button. ⊟
8.	For this example, search for the person requesting enrollment by entering criteria in the **Requester's First Name** field.
9.	Click in the **Requester's First Name** field. [ ]
10.	Enter the desired information into the **Requester's First Name** field. Enter "**Malavika**".
11.	Click the **Search** button. Search

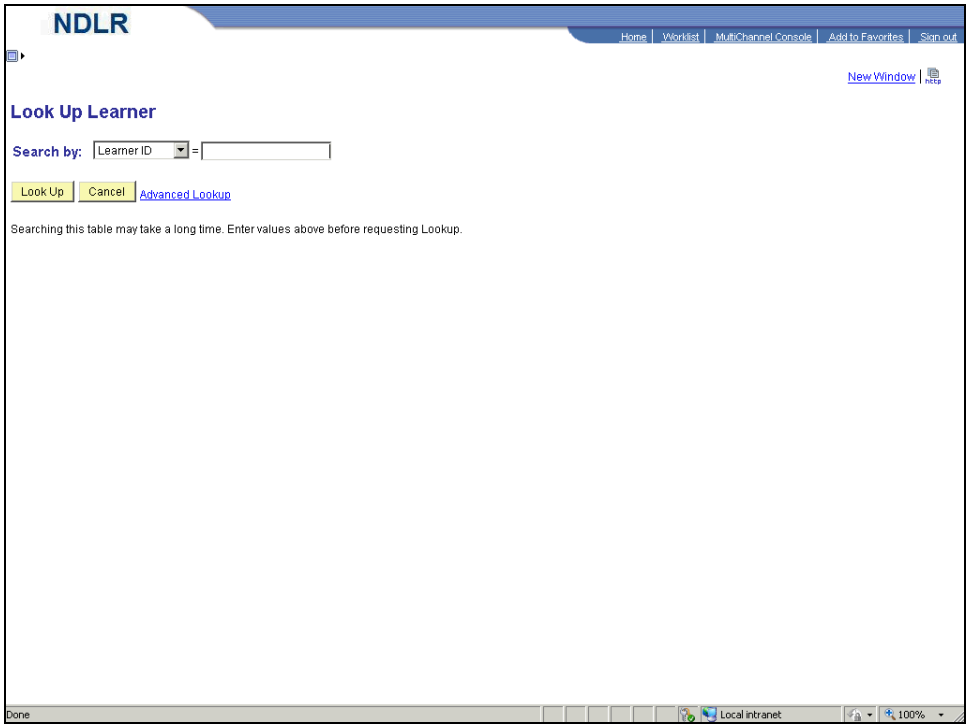
Step	Action
12.	Click the **Select** button. Select
13.	The **Enroll Learners - Search for Learning** page allows you to search for the requested activity or program by entering criteria in one or more of the search criteria fields.



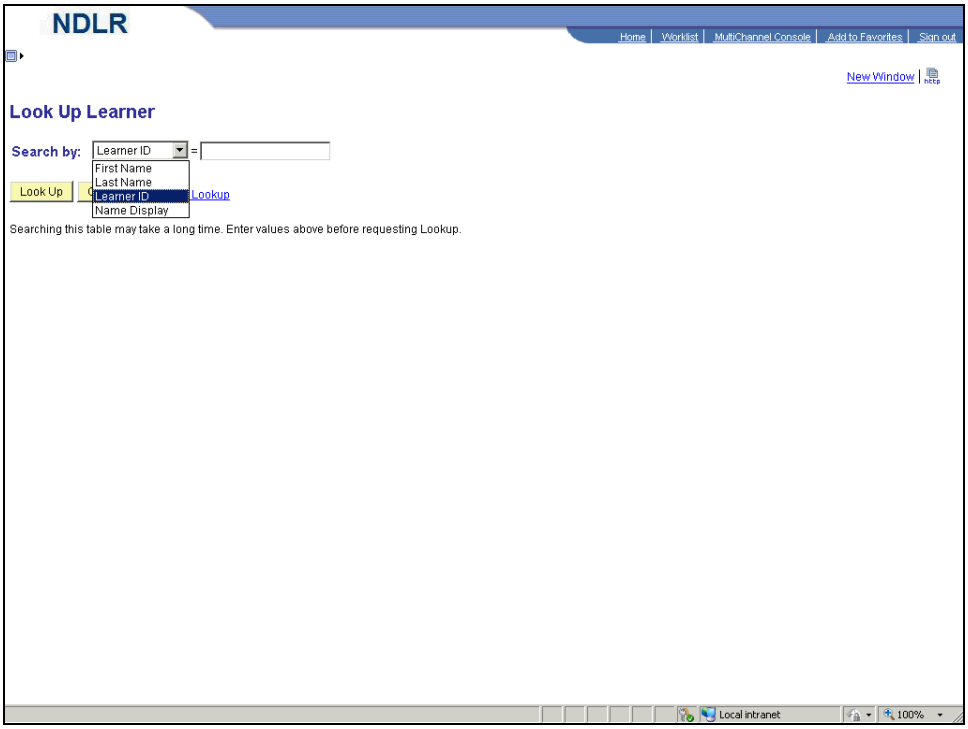
Step	Action
14.	Click in the **Activity Code** field.
15.	Enter the desired information into the **Activity Code** field. Enter "**16**".
16.	Click the **Search** button. Search
17.	Click the **Enroll** button. Enroll
18.	You are now able to view details for the activity, **Cultural Awareness**, that is offered on 12/11/2009.



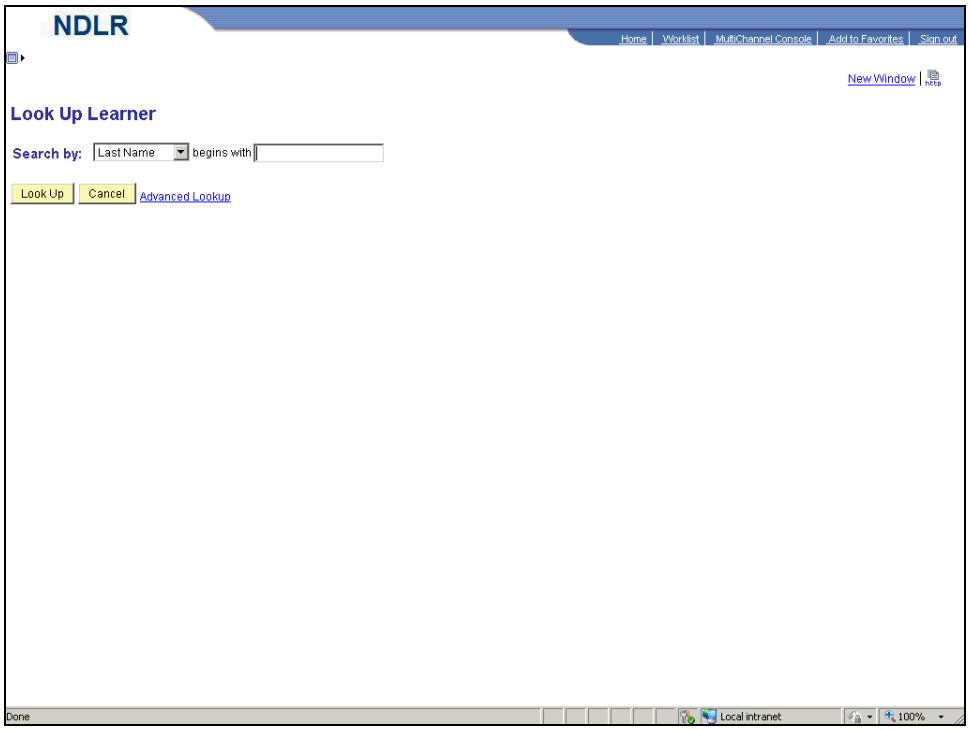
Step	Action
19.	Click the **Learner Lookup** button.



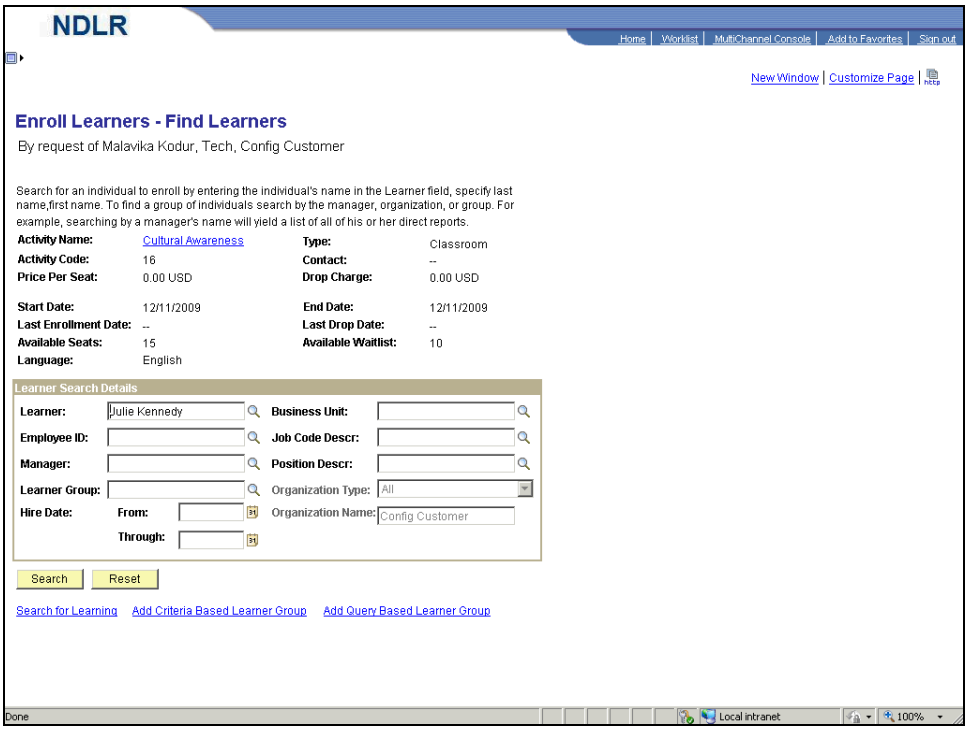
Step	Action
20.	Click the **Search by** drop-down list.



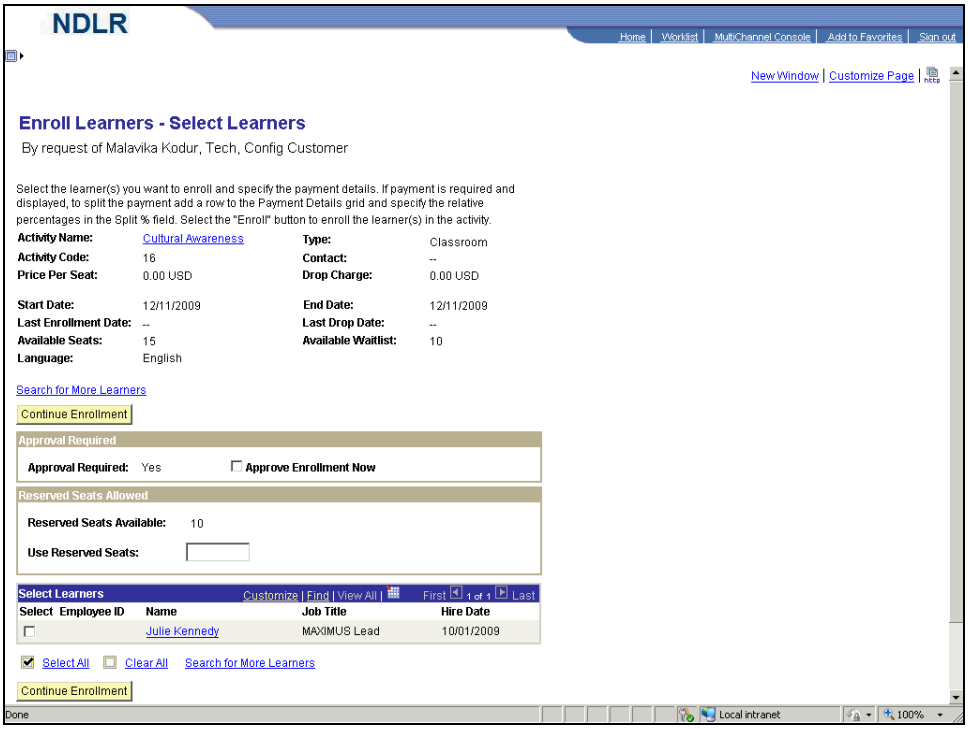
Step	Action
21.	Select the "**Last Name**" list item.



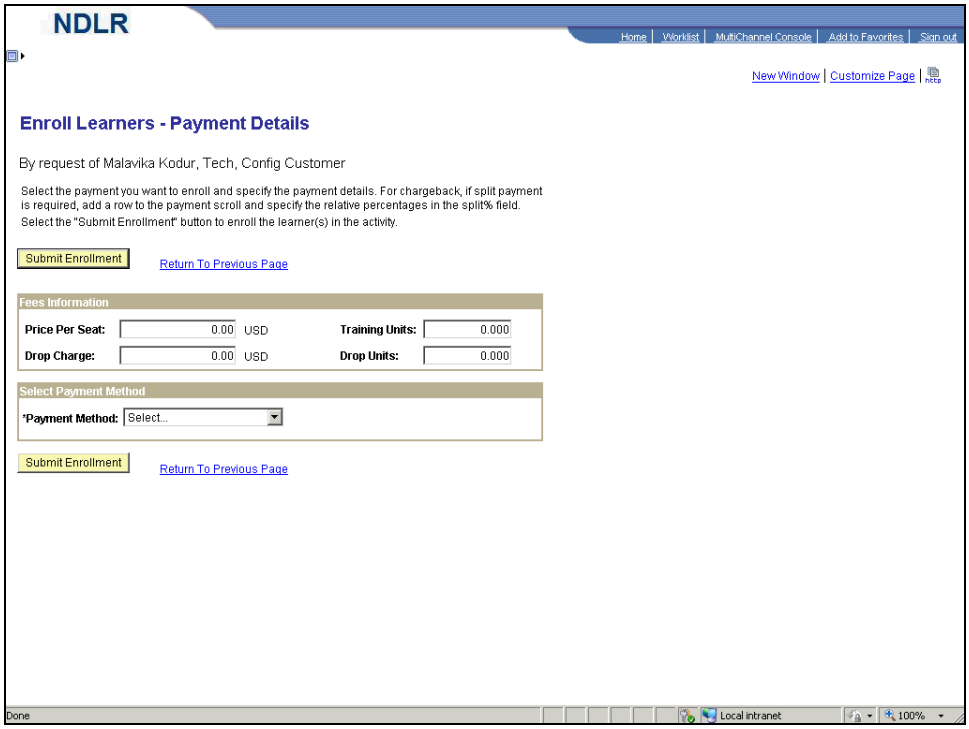
Step	Action
22.	Enter the desired information into the **begins with** field. Enter "**Kennedy**".
23.	Click the **Look Up** button. Look Up
24.	Click the "**Kennedy**" link. Kennedy



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



Step	Action
26.	Click the **Select** option for Julie Kennedy.
27.	The **Use Reserved Seats** field will allow you to reserve a specific number of seats for an activity.
28.	Click in the **Use Reserved Seats** field.
29.	Enter the desired information into the **Use Reserved Seats** field. Enter "**5**".
30.	Click the **Continue Enrollment** button. Continue Enrollment



Step	Action
31.	Click the **Submit Enrollment** button. Submit Enrollment
32.	Julie Kennedy has been successfully enrolled in the activity: **Cultural Awareness**. There are also five remaining seats that have been reserved.

Step	Action
33.	**Congratulations**! You should now be able to: - Navigate to the **Enroll Learners - Find Requester** page. - Enroll learners into an activity using reserved seats. **End of Procedure.**

7.6 Submitting Learning Requests

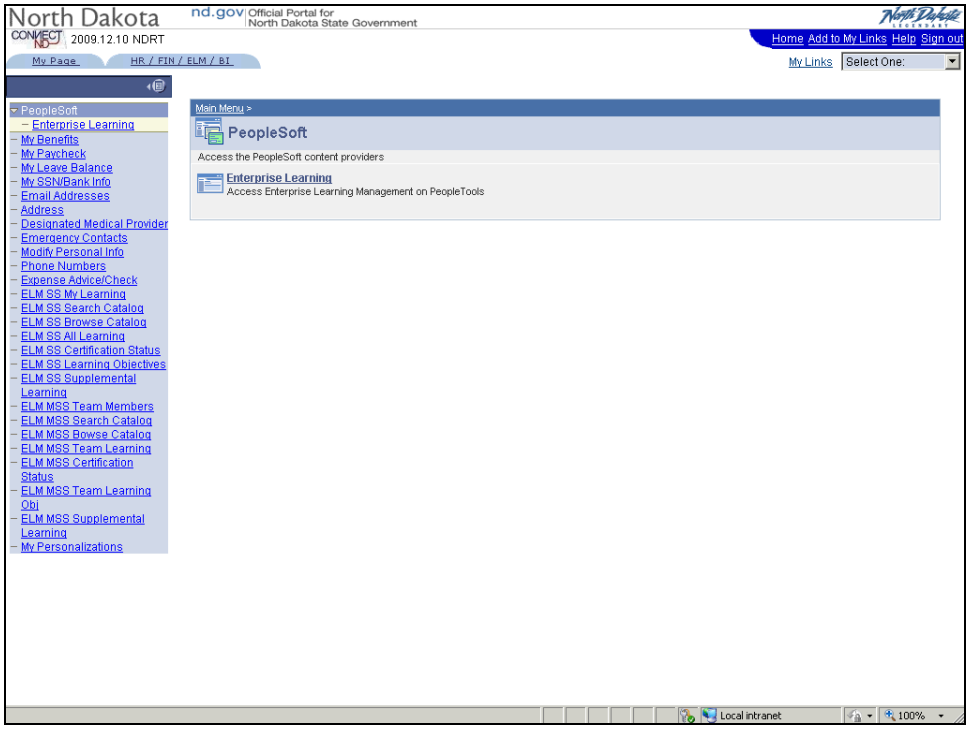
Administrators have the ability to submit learning requests on behalf of learners. Learning requests enable users to request activities that are listed in the catalog.

Procedure

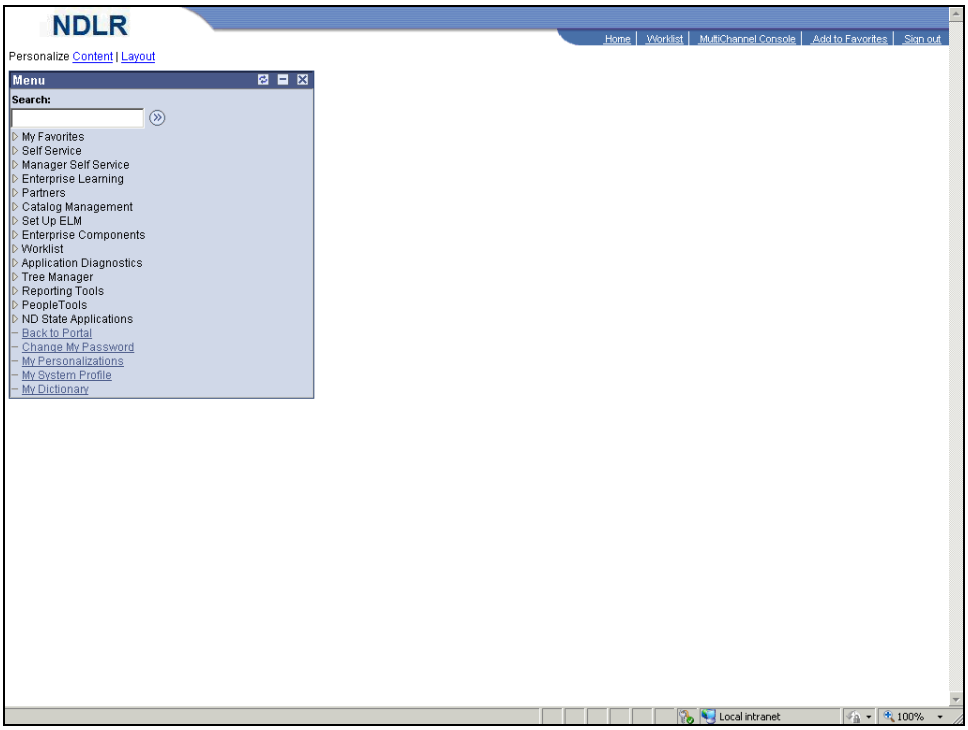
By the end of this topic, you should be able to:

- Navigate to the **Submit Learning Requests - Find Requesters** page.
- Submit learning requests.

Step	Action
1.	Begin by navigating to the **Submit Learning Requests - Find Requester** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

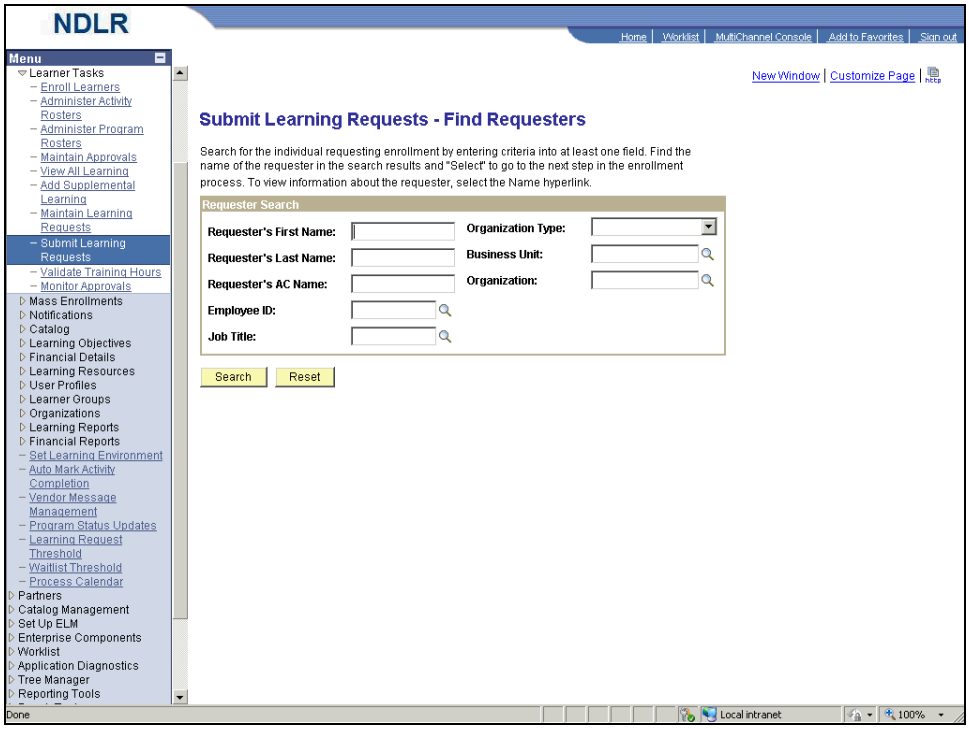


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning



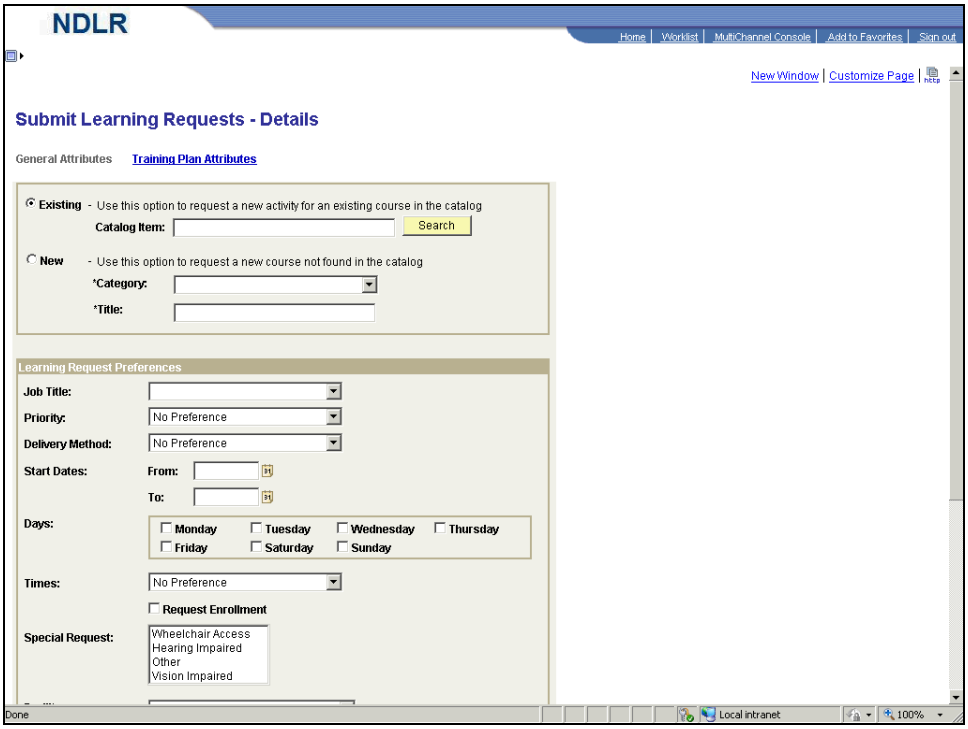
Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Submit Learning Requests** link.



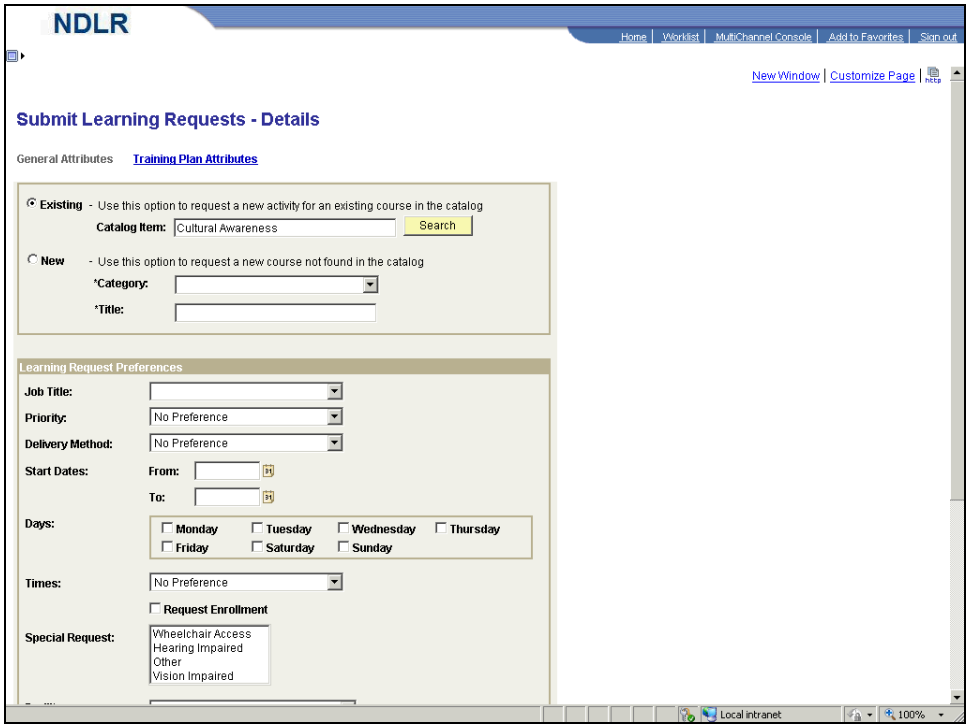
Step	Action
7.	Click the **Collapse Menu** button. ⊟
8.	The **Submit Learning Requests - Find Requesters** page is used to search for the person requesting enrollment either for themselves or on behalf of another learner.
9.	Click in the **Requester's First Name** field.
10.	Enter the desired information into the **Requester's First Name** field. Enter "**Malavika**".
11.	Click the **Search** button. Search
12.	Click the **Select** button. Select

Step	Action
13.	Use the **Submit Learning Requests - Details** page to search for an activity in the catalog.

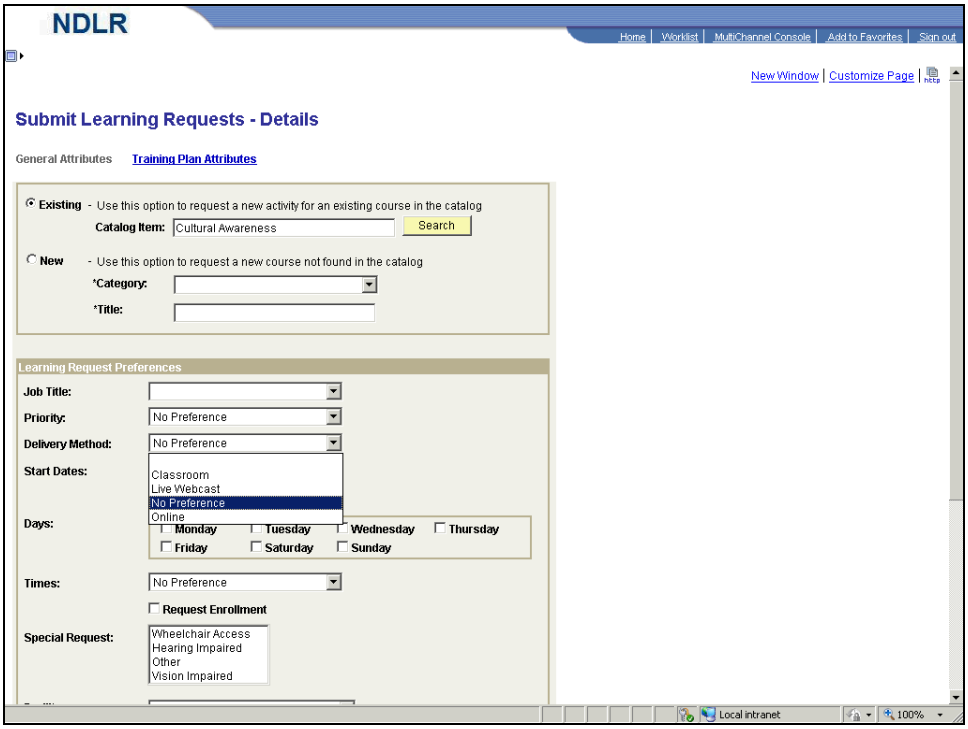


Step	Action
14.	Click the **Search** button. Search

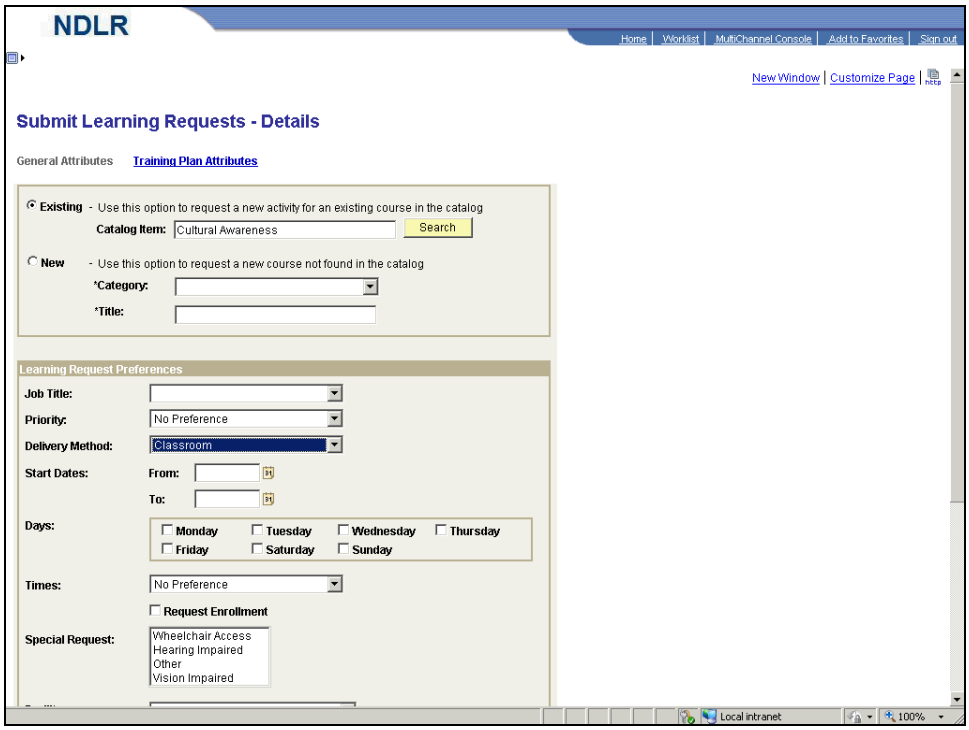
Step	Action
15.	Click the **Select** link. Select



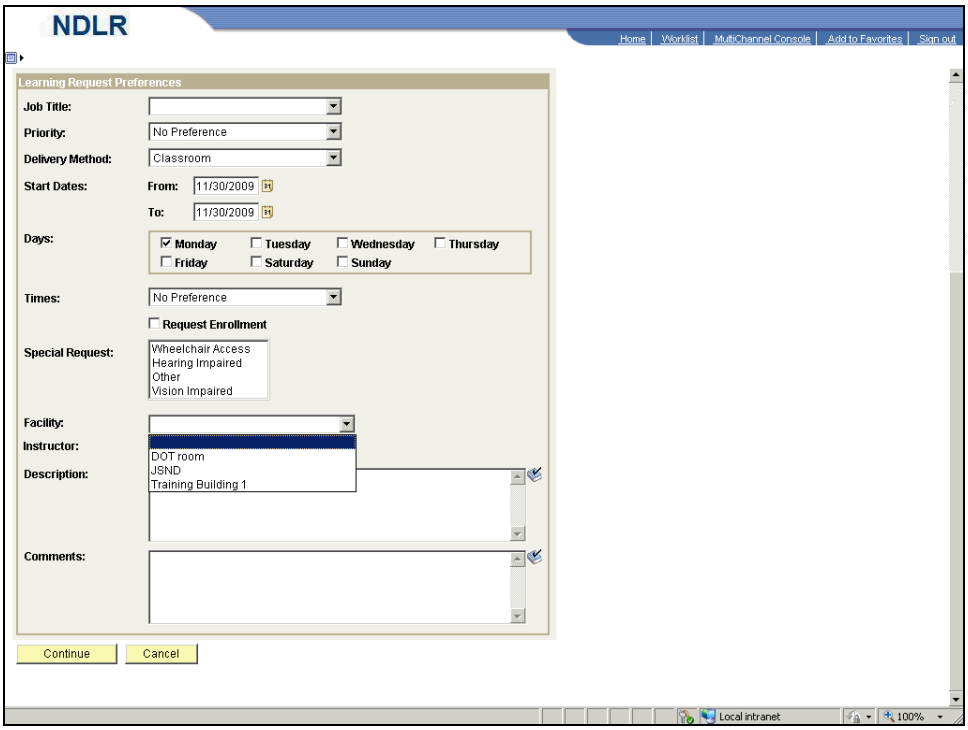
Step	Action
16.	Click the **Delivery Method** drop-down list.



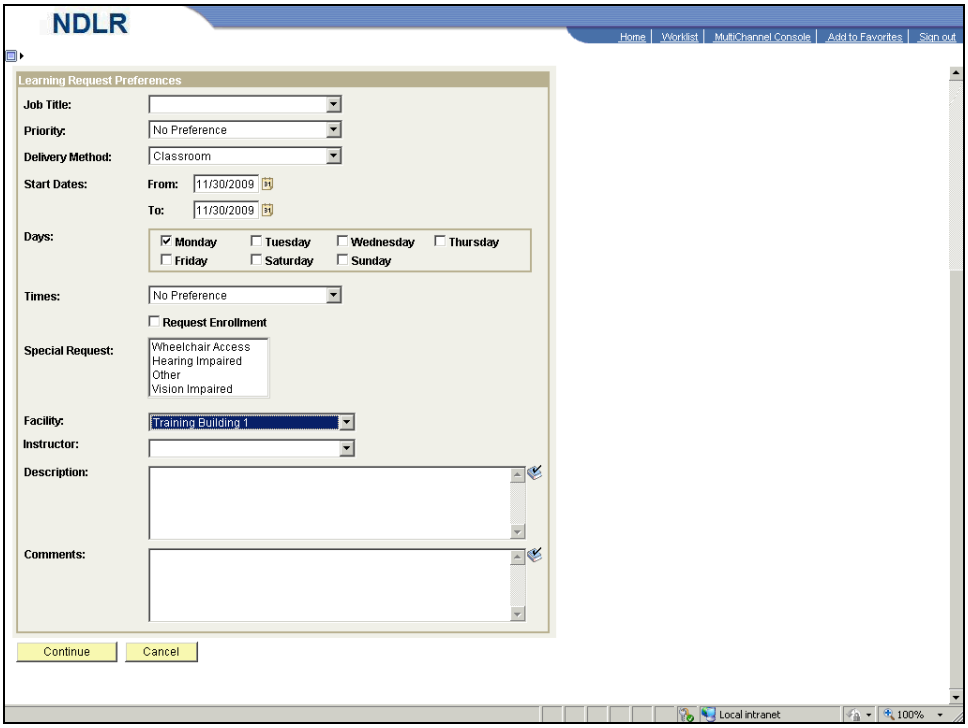
Step	Action
17.	Select the "**Classroom**" list item.



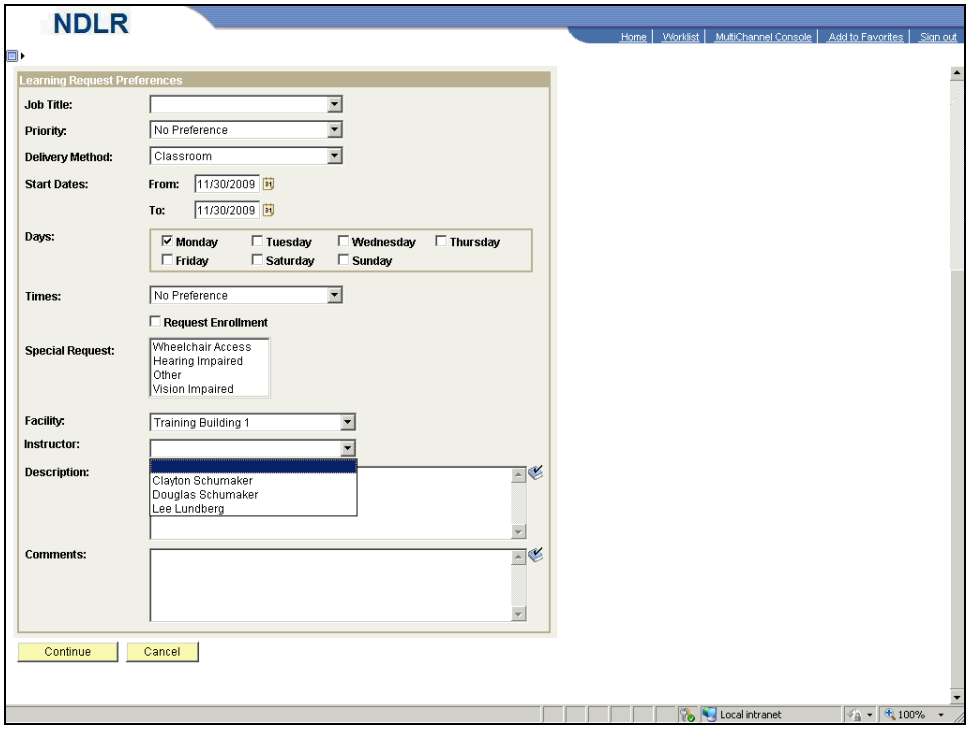
Step	Action
18.	Click the **Choose a date** button.
19.	Click the "**30**" link.
20.	Click the **Choose a date** button.
21.	Click the "**30**" link.
22.	Click the **Monday** option.
23.	Click the scroll bar.
24.	Click the **Facility** drop-down list.



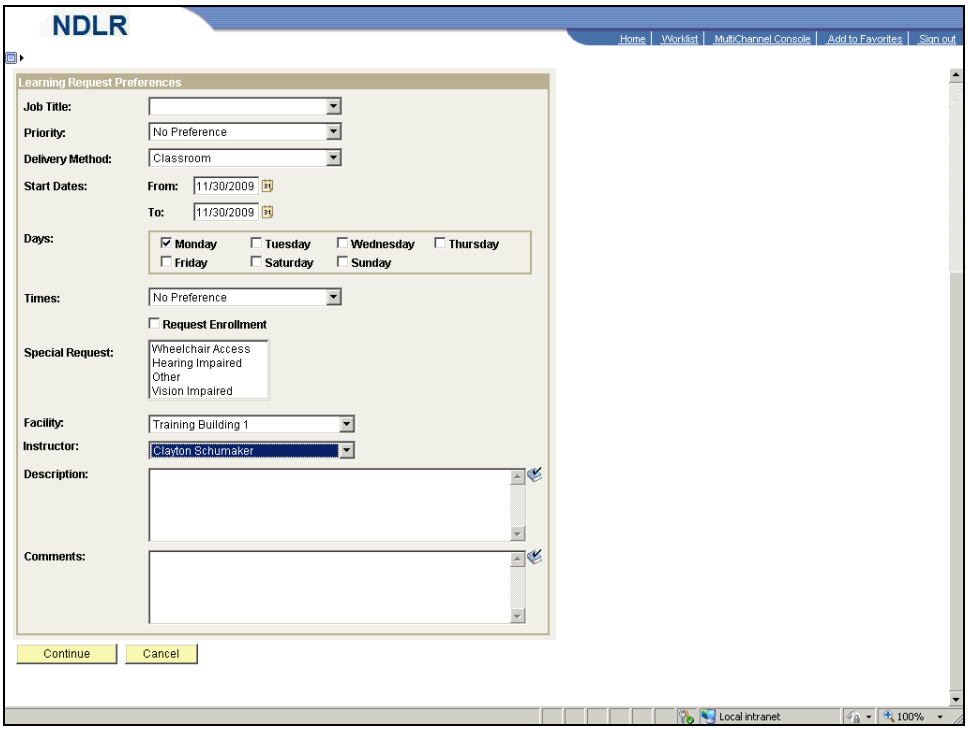
Step	Action
25.	Select the "**Training Building 1**" list item. Training Building 1



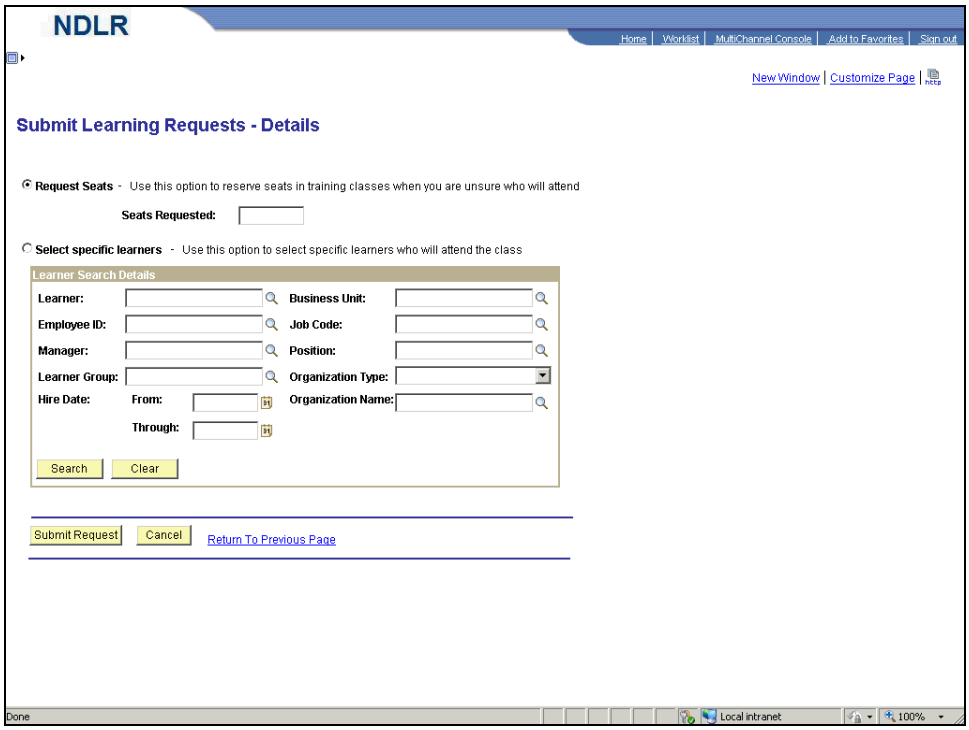
Step	Action
26.	Click the **Instructor** drop-down list.



Step	Action
27.	Select the "**Clayton Schumaker**" list item. Clayton Schumaker



Step	Action
28.	Click the **Continue** button. Continue
29.	Notice you have the ability to request a specific number of seats or you can specify specific learners that you want to request learning for.



Step	Action
30.	Click in the **Seats Requested** field.
31.	Enter the desired information into the **Seats Requested** field. Enter "**15**".
32.	Click the **Submit Request** button. Submit Request
33.	View the **Learning Request Confirmation** details.
34.	**Congratulations**! You should now be able to: - Navigate to the **Submit Learning Requests - Find Requesters** page. - Submit learning requests. **End of Procedure.**

7.7 Adding Supplemental Learning

Administrators can add supplemental learning to a learners training plan in the ELM system. Supplemental Learning is any learning that is not listed in the catalog.

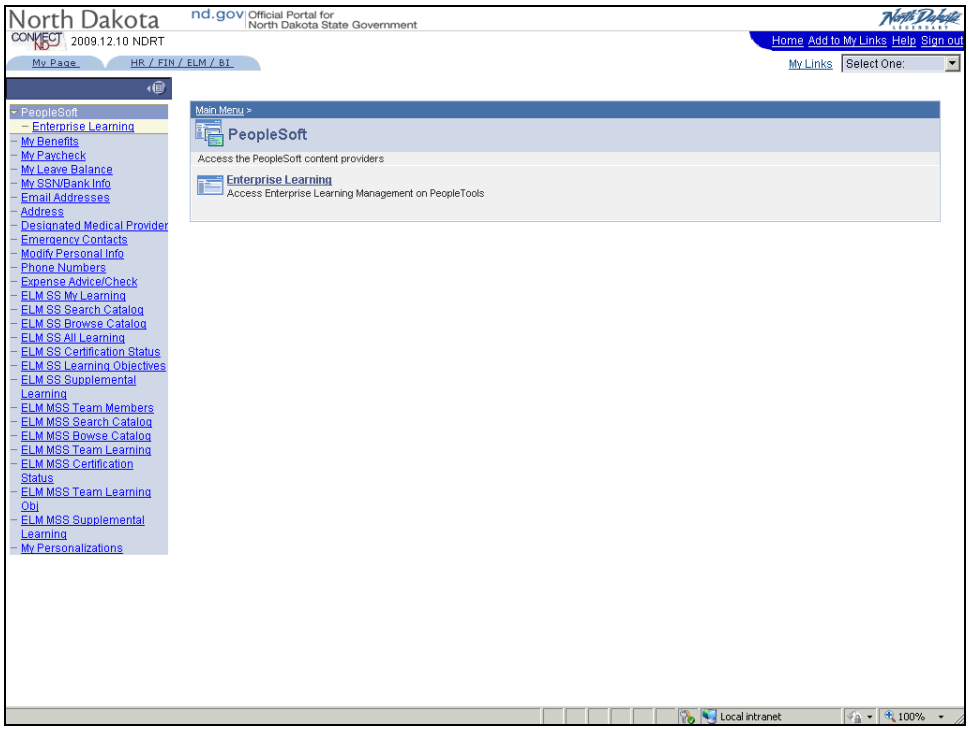
Procedure

By the end of this topic, you should be able to:

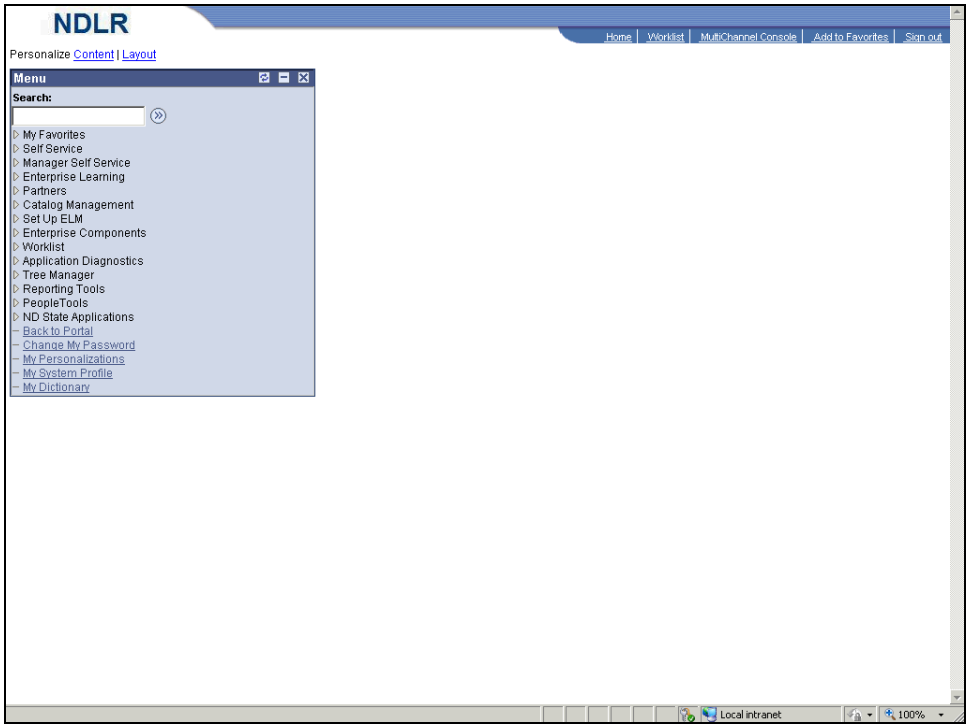
- Navigate to the **Supplemental Learning - Find Learners** page.

- Add supplemental learning.

Step	Action
1.	Begin by navigating to the **Supplemental Learning - Enroll Learners** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

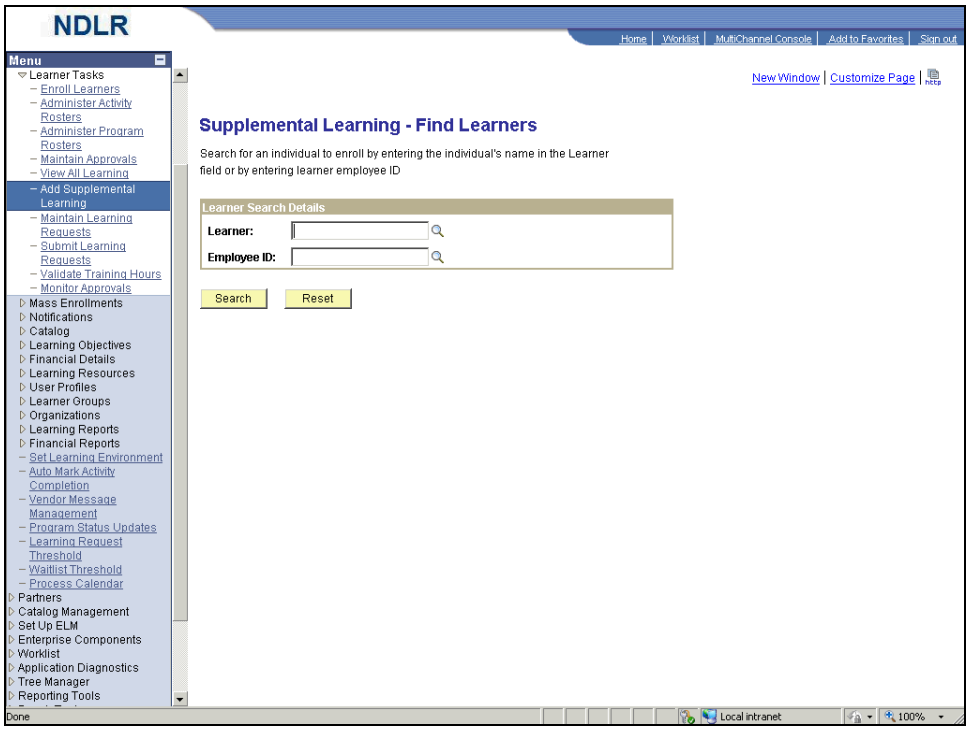


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

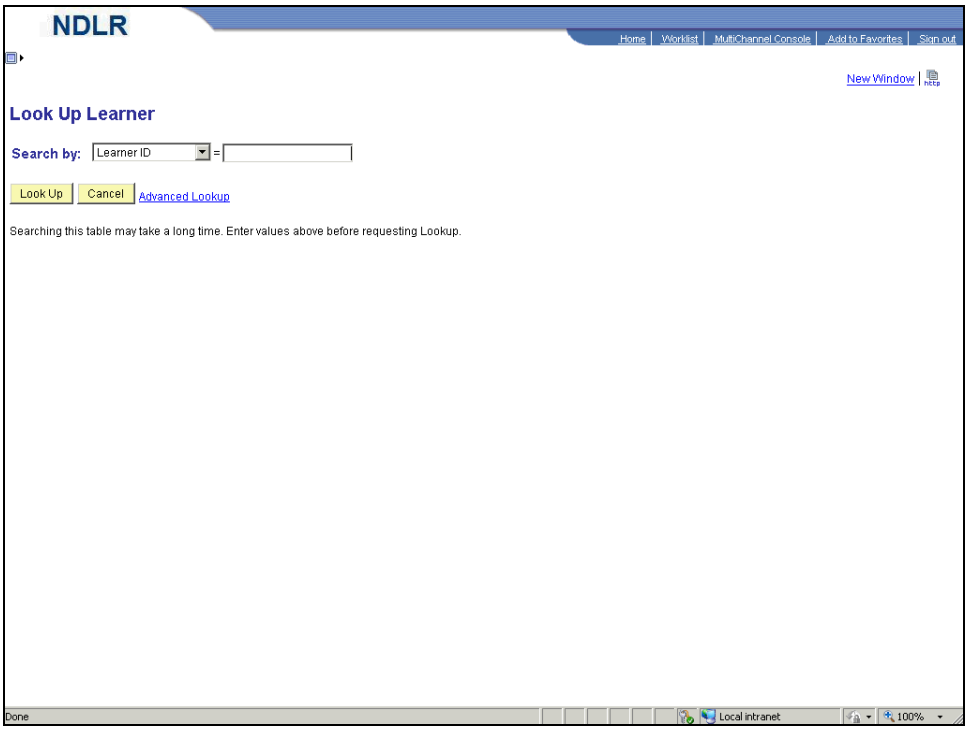


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

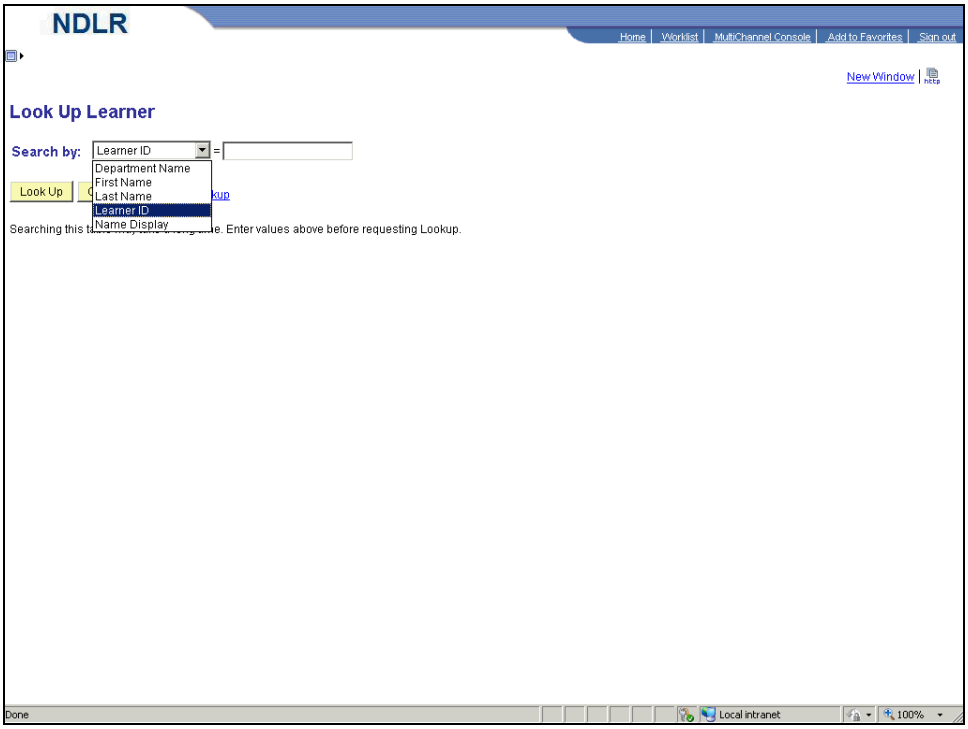
Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Add Supplemental Learning** link.



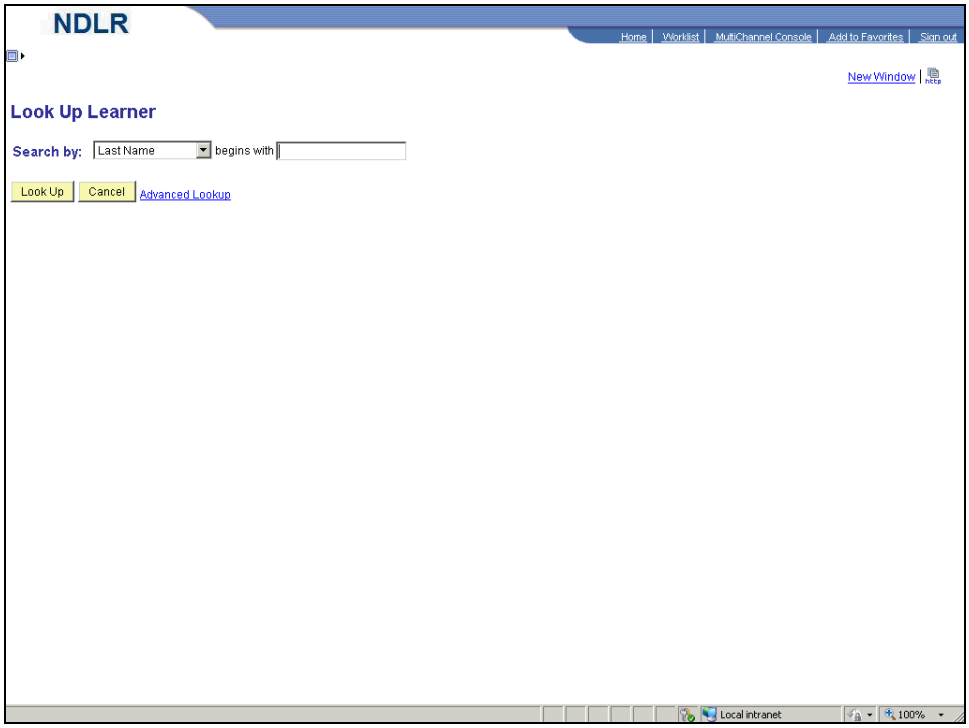
Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Learner Lookup** button.



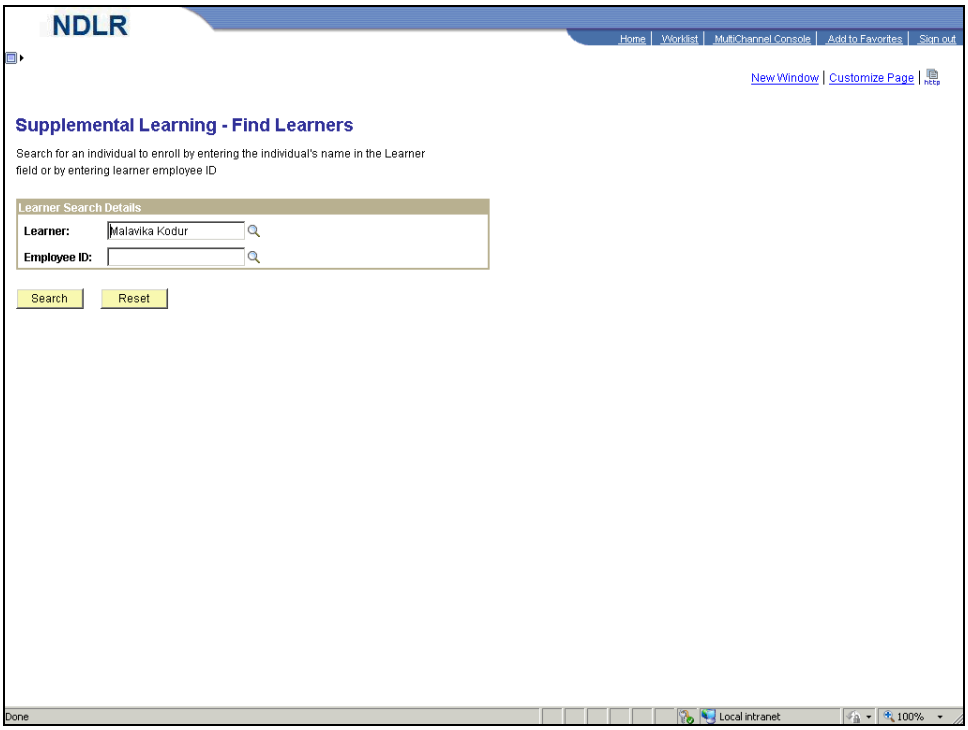
Step	Action
9.	Click the **Search by** drop-down list.



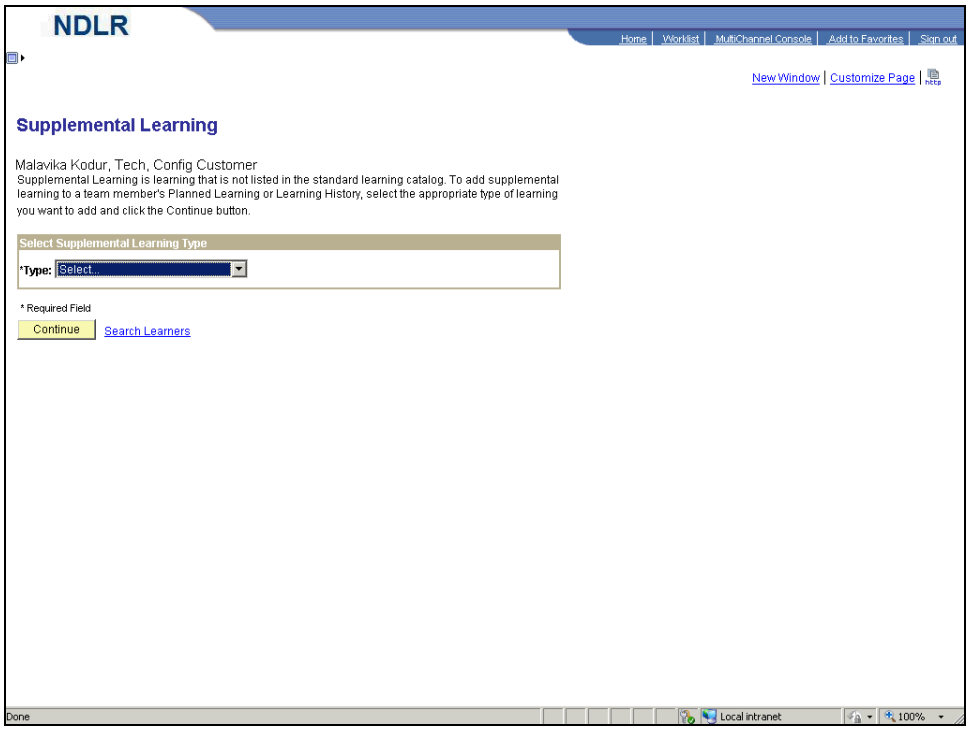
Step	Action
10.	Select the "**Last Name**" list item. Last Name



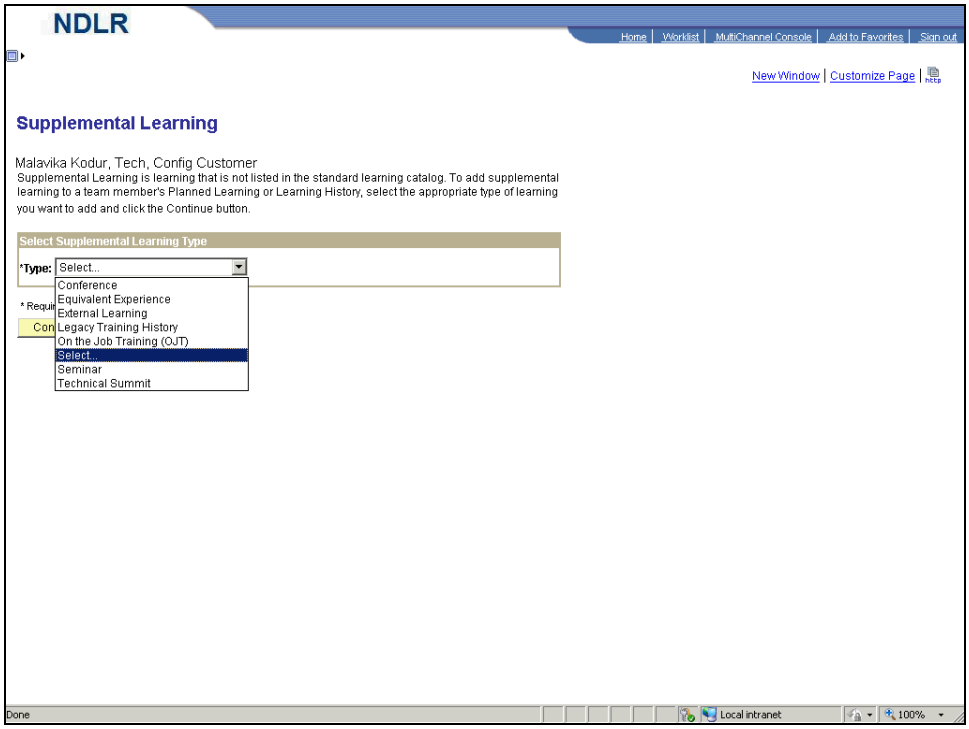
Step	Action
11.	Enter the desired information into the **begins with** field. Enter "**Kodur**".
12.	Click the **Look Up** button. Look Up
13.	Click the "**Kodur**" link. Kodur



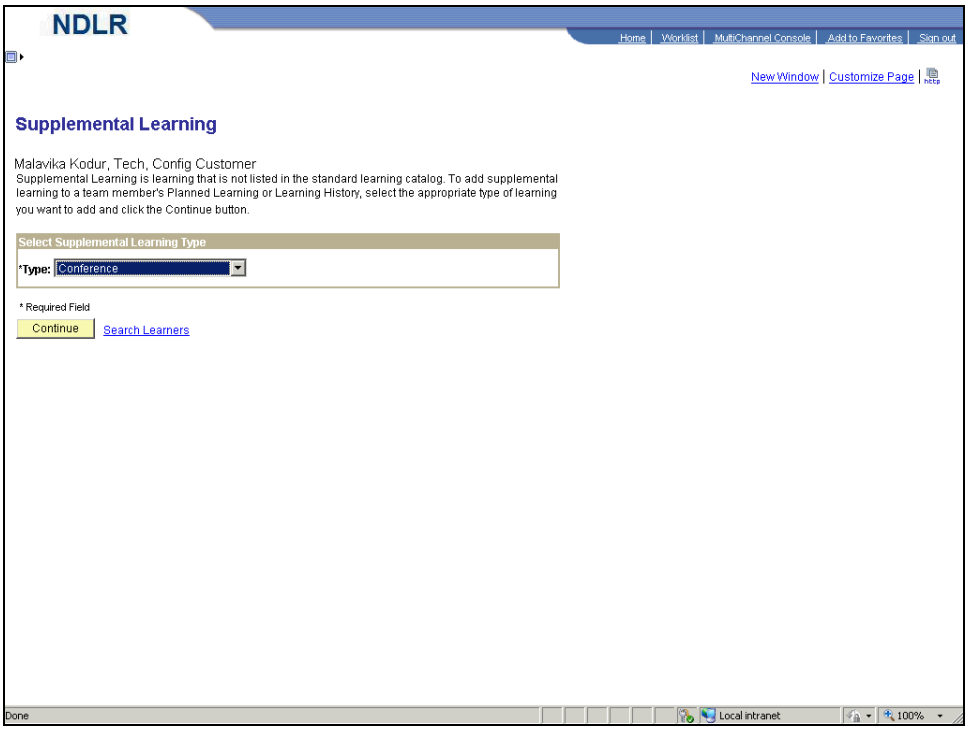
Step	Action
14.	Click the **Search** button. Search
15.	Click the **Add** button. Add
16.	The **Supplemental Learning** page is used to add additional learning to a persons planned learning that is not listed in the standard learning catalog.



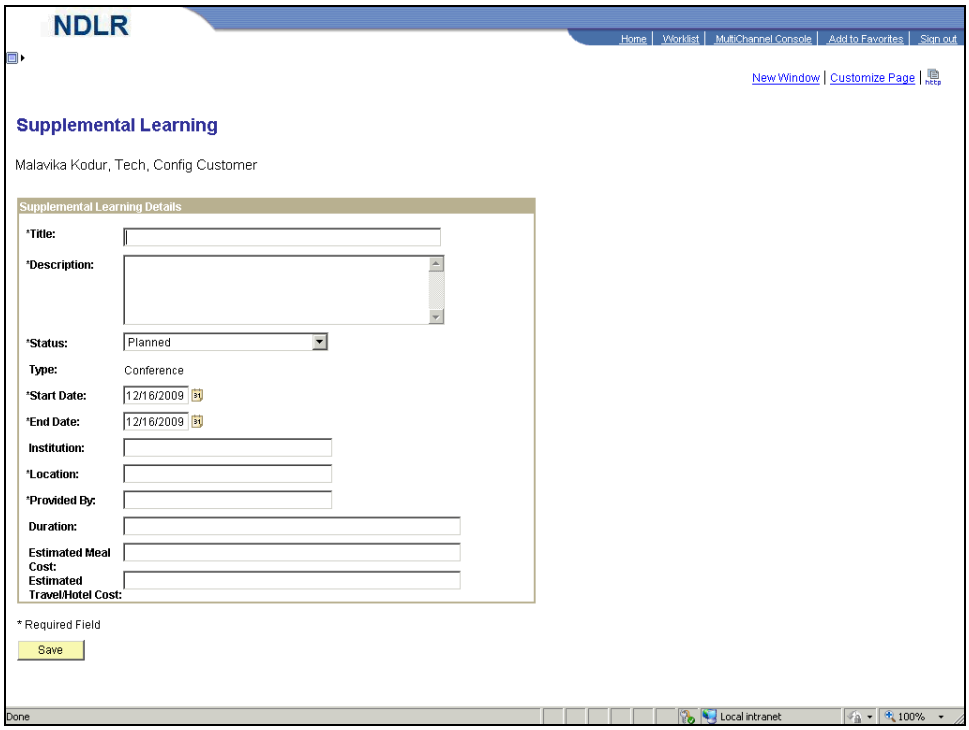
Step	Action
17.	Click the **Type** drop-down list.



Step	Action
18.	Select the "**Conference**" list item. Conference
19.	**Note**: To enter education units for tracking purposes, the "**External Learning**" supplemental learning type must be selected from the drop-down list.



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



Step	Action
21.	Enter the desired information into the **Title** field. Enter "**Retiring from the Government**".
22.	Click in the **Description** field.
23.	Enter the desired information into the **Description** field. Enter "**Description**".
24.	Click the **Choose a date** button.
25.	Click the "**23**" link.
26.	Click the **Choose a date** button.
27.	Click the "**24**" link.
28.	Click in the **Location** field.
29.	Enter the desired information into the **Location** field. Enter "**Bismarck, ND**".

Step	Action
30.	Click in the **Provided By** field.
31.	Enter the desired information into the **Provided By** field. Enter "**State of North Dakota**".
32.	Click the **Save** button. Save
33.	Notice the **Supplemental Learning** has been added.
34.	**Congratulations**! You should now be able to: - Navigate to the **Supplemental Learning - Find Learners** page. - Add supplemental learning. **End of Procedure.**

7.8 Approving/Denying Enrollments

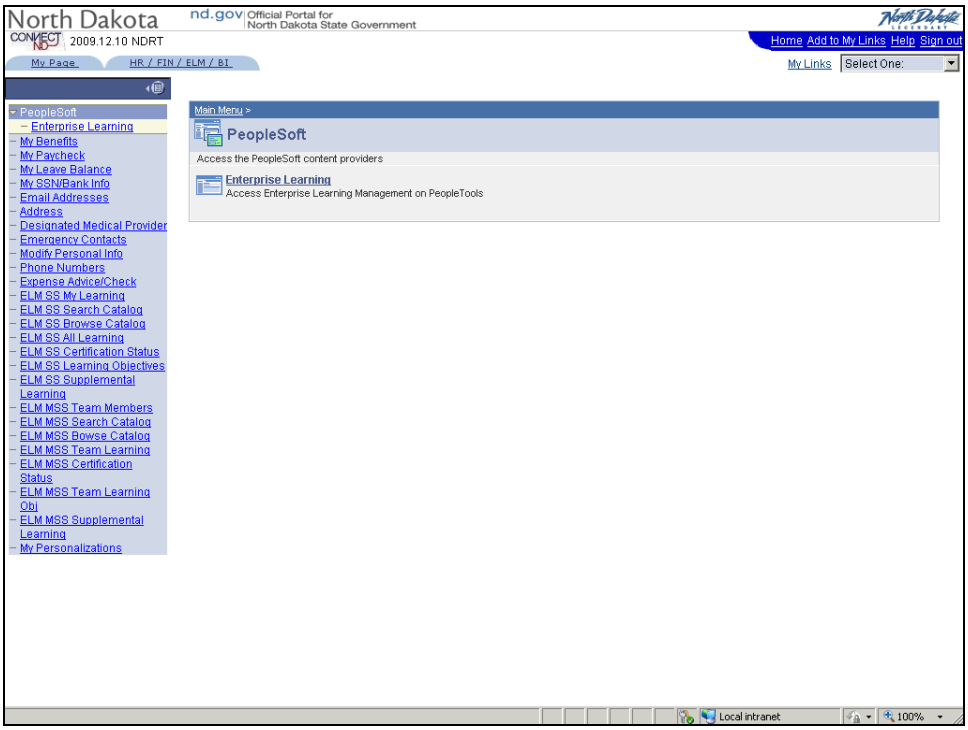
Learning Administrators have the ability to approve and deny a learners learning request from the **Maintain Approvals** page. All pending requests will display for Learning Administrators when they open this page.

Procedure

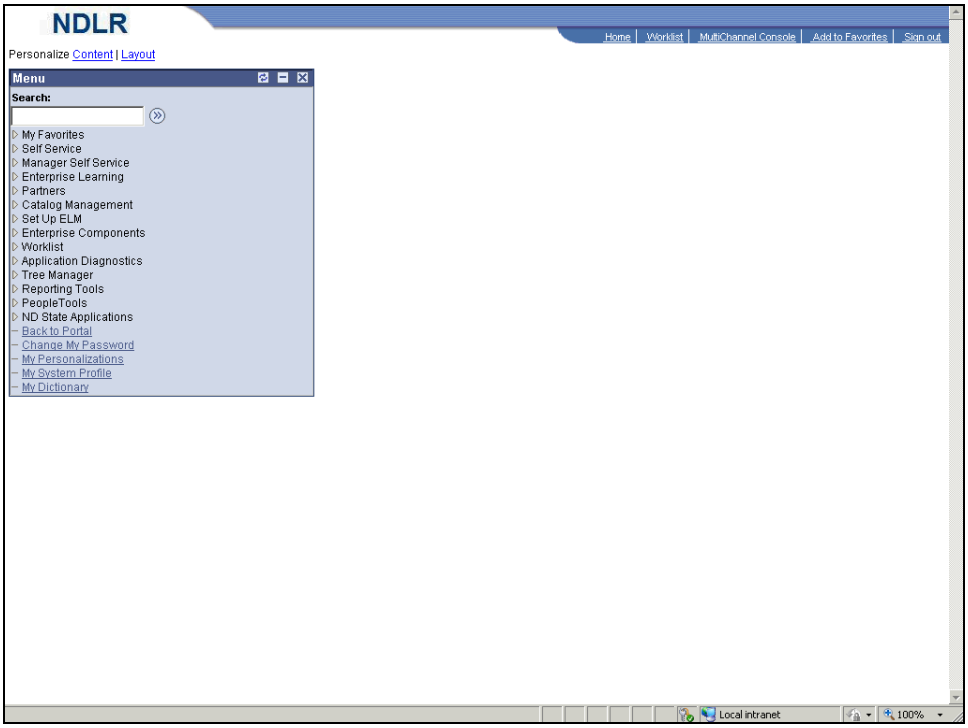
By the end of this topic, you will be able to:

- Navigate to the **Maintain Approvals** page.
- Approving/Denying Enrollments.

Step	Action
1.	Begin by navigating to the **Maintain Approvals** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft



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



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

Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Maintain Approvals** link. – Maintain Approvals

Step	Action
7.	Click the **Collapse Menu** button.
8.	The **Maintain Approvals** page is used by Learning Administrators to view enrollment and registration requests. Learning Administrators can approve, deny and insert additional approvers or reviewers.
9.	Click the **Kim Riedlinger-Wassim** option.
10.	Click the **Approve** button. Approve
11.	This learner has been successfully enrolled in the activity: **Lincoln 101**.
12.	**Congratulations**! You should now be able to: - Navigate to the **Maintain Approvals** page. - Approving/Denying Enrollments. **End of Procedure.**

7.9 Dropping a Learner from an Activity

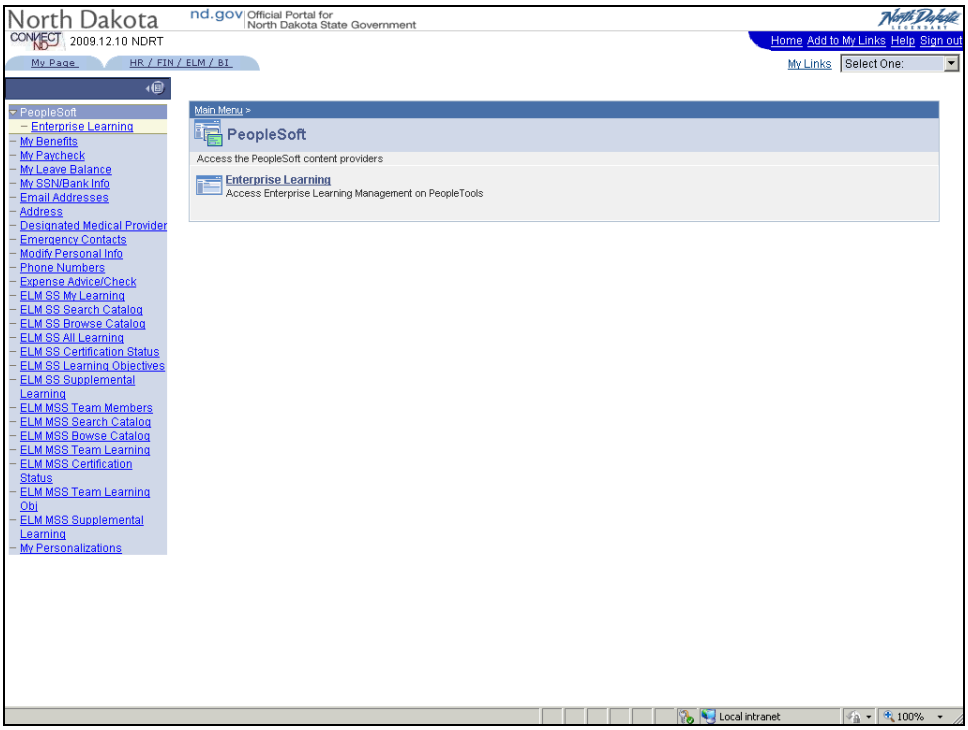
Learners, managers and administrators can drop a learner's enrollment in an activity or registration in a program. However, learners cannot drop activities or programs if they were not the requesters during enrollment or registration. A learner can drop activities and programs that he or she self-enrolls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

Procedure

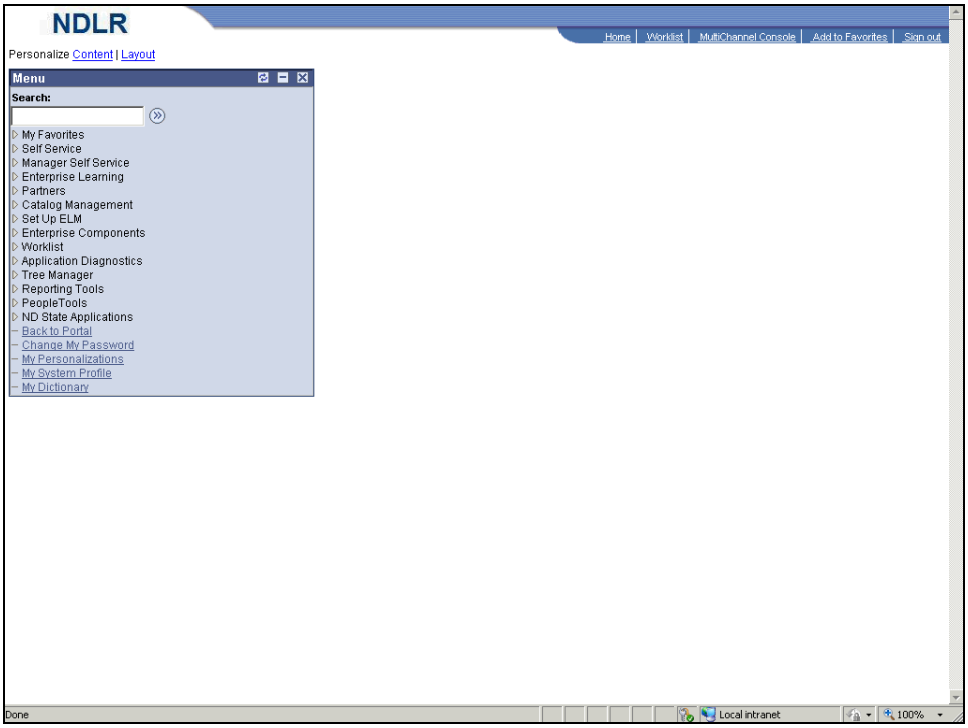
By the end of this topic, you should be able to:

- Navigate to the **All Learning - Find Learners** page.
- Drop a learner from an activity.

Step	Action
1.	Begin by navigating to the **All Learning - Find Learners** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

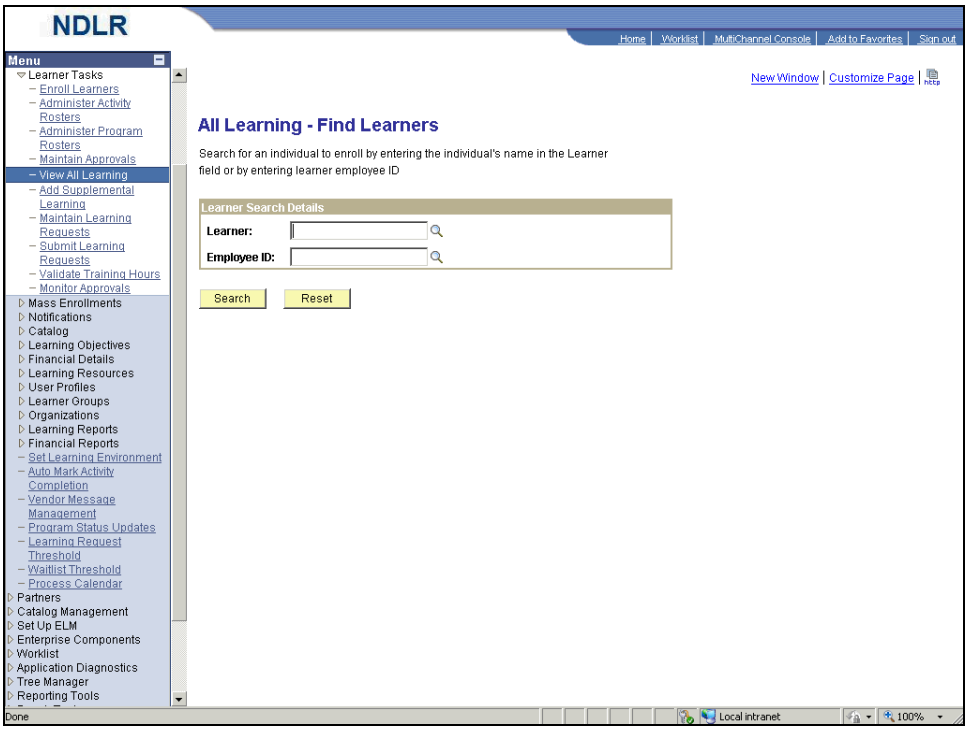


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

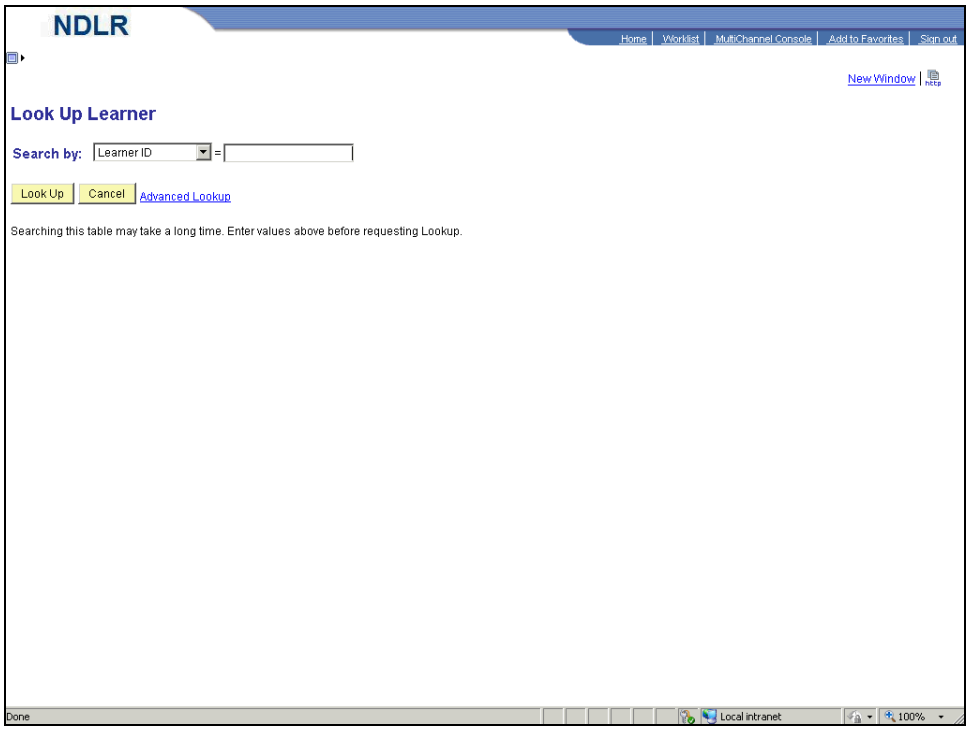


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

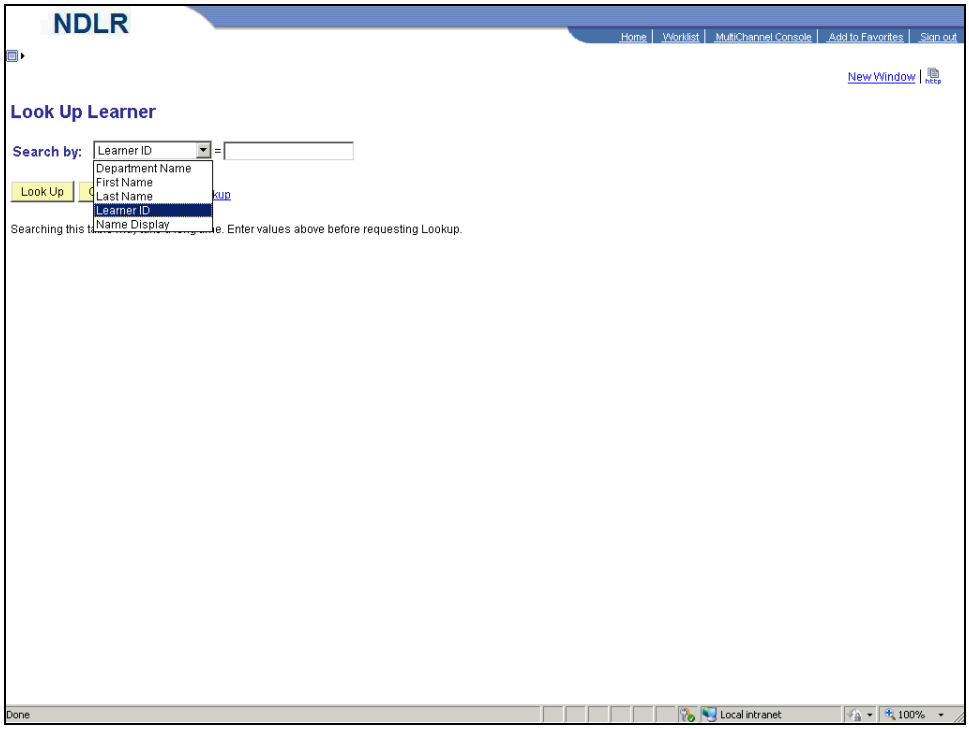
Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **View All Learning** link. – View All Learning



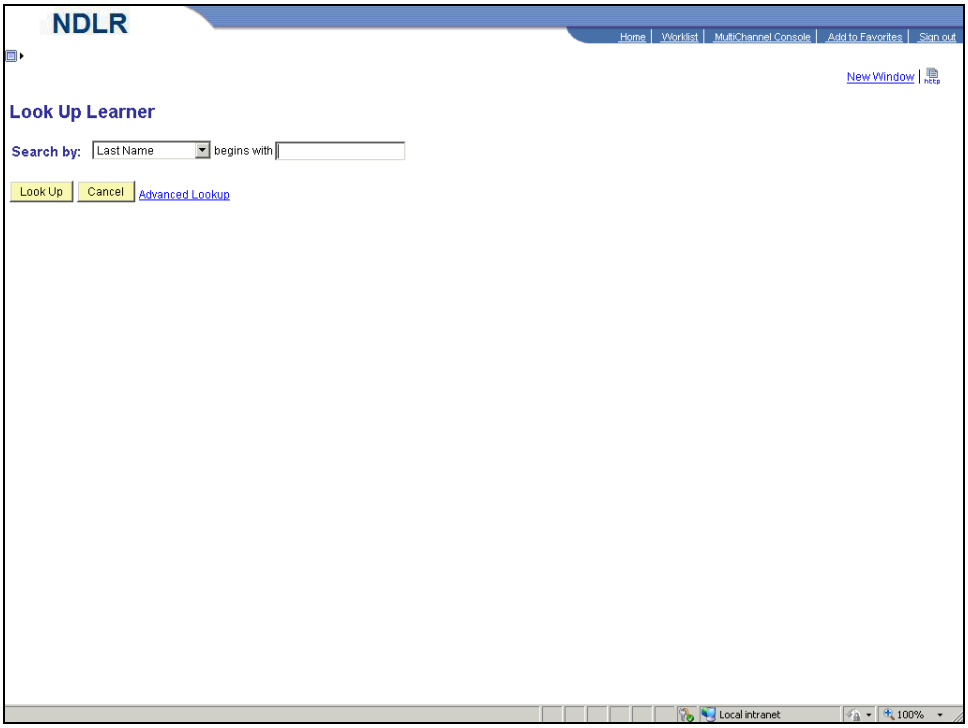
Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Learner Lookup** button.



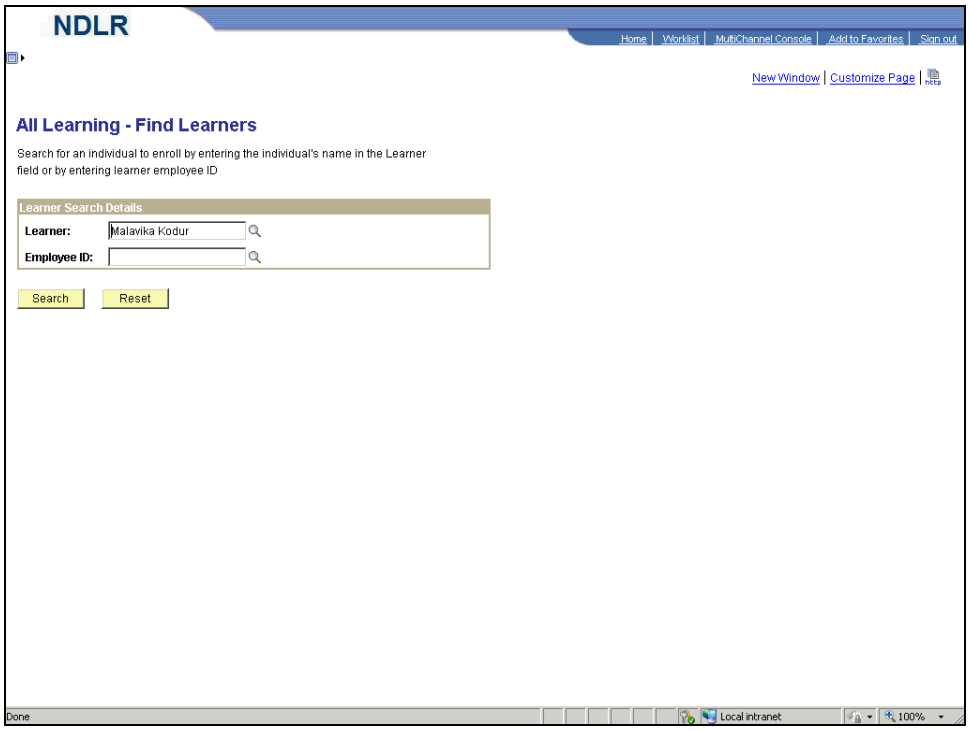
Step	Action
9.	Click the **Search by** drop-down list.



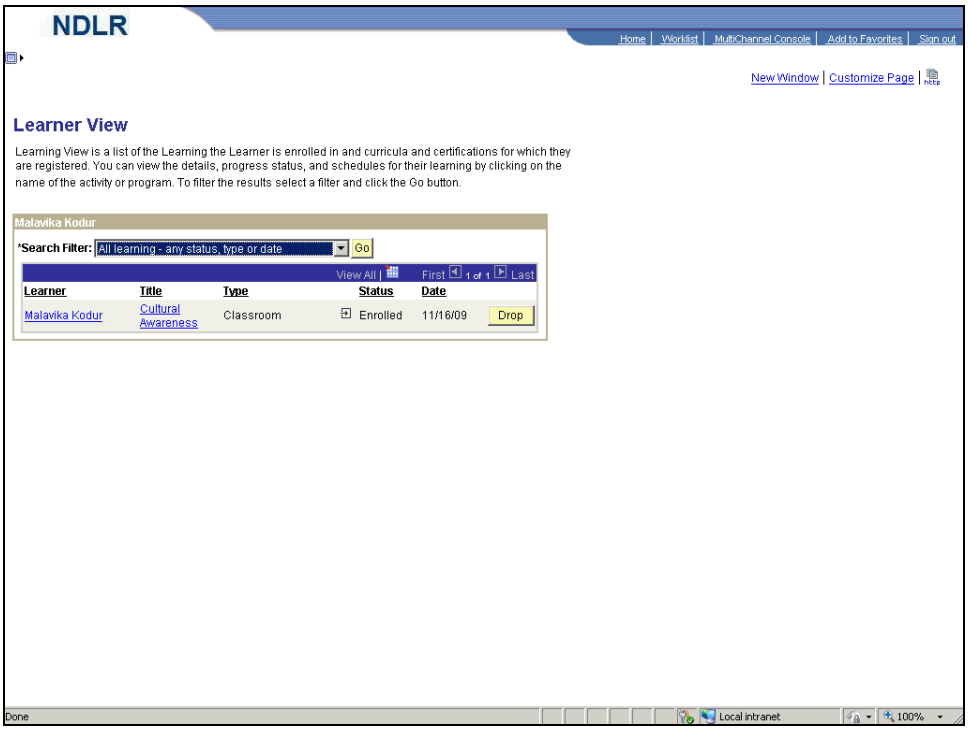
Step	Action
10.	Select the "**Last Name**" list item. Last Name



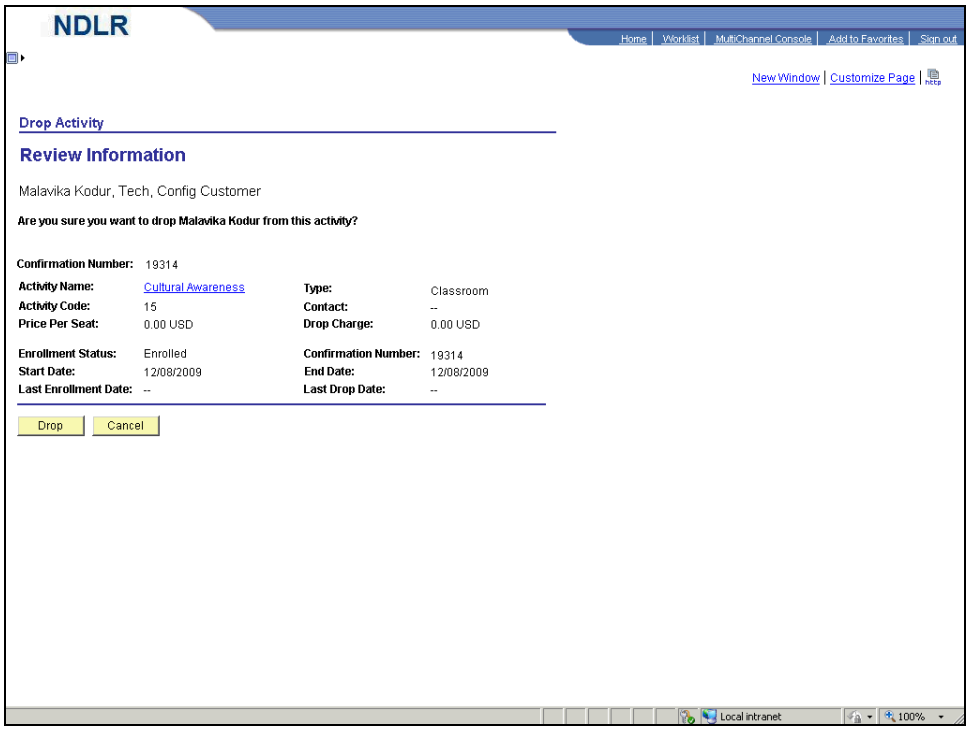
Step	Action
11.	Enter the desired information into the **begins with** field. Enter "**Kodur**".
12.	Click the **Look Up** button. Look Up
13.	Select the "**Kodur**" list item. Kodur



Step	Action
14.	Click the **Search** button. Search
15.	Click the **Select** button. Select
16.	The **Learner View** page allows you to view all the learning a learner is currently enrolled in and/or curricula and certifications they are registered for.



Step	Action
17.	Click the **Drop** button. Drop
18.	Prior to dropping a learner from an activity you are able to view the activity details to ensure the correct activity is selected.



Step	Action
19.	Click the **Drop** button. Drop
20.	Malavika Kodur has been successfully dropped from the activity: **Cultural Awareness**.
21.	**Congratulations**! You should now be able to: - Navigate to the **All Learning - Find Learners** page. - Drop a learner from an activity. **End of Procedure.**

Lesson 8: Managing Learner Registrations and Marking Grades and Attendance

8.1 Viewing All Learning

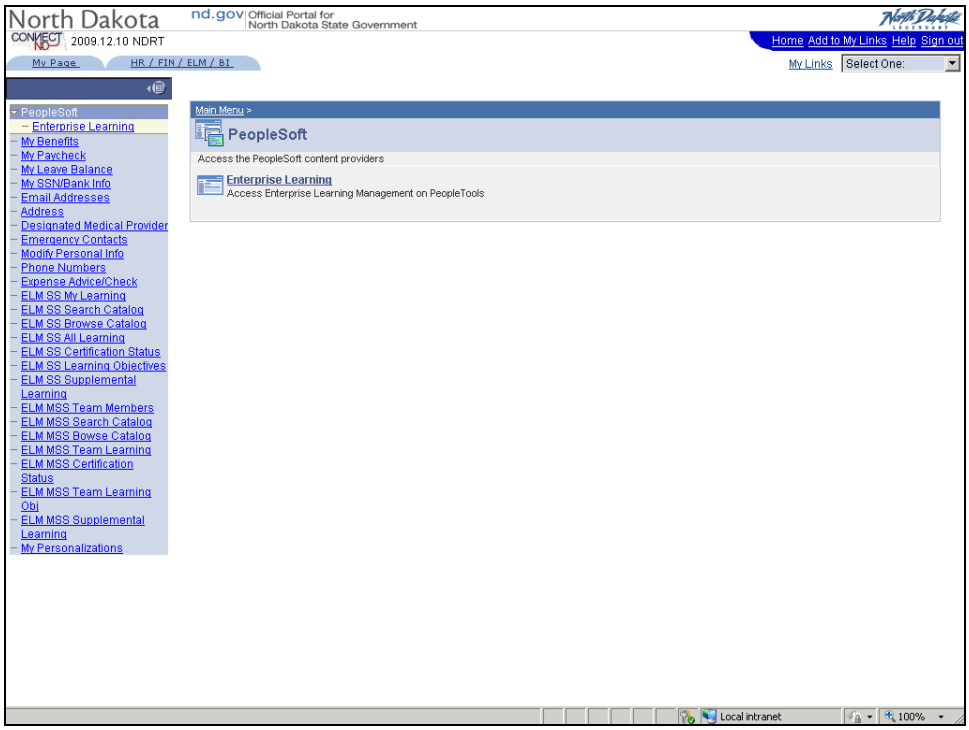
From the **All Learning** page, administrators can view all learning activities that are scheduled or planned as well as any activities in which a learner is currently enrolled or that have been completed or waived. Administrators can also enroll, drop or modify learning from this page.

Procedure

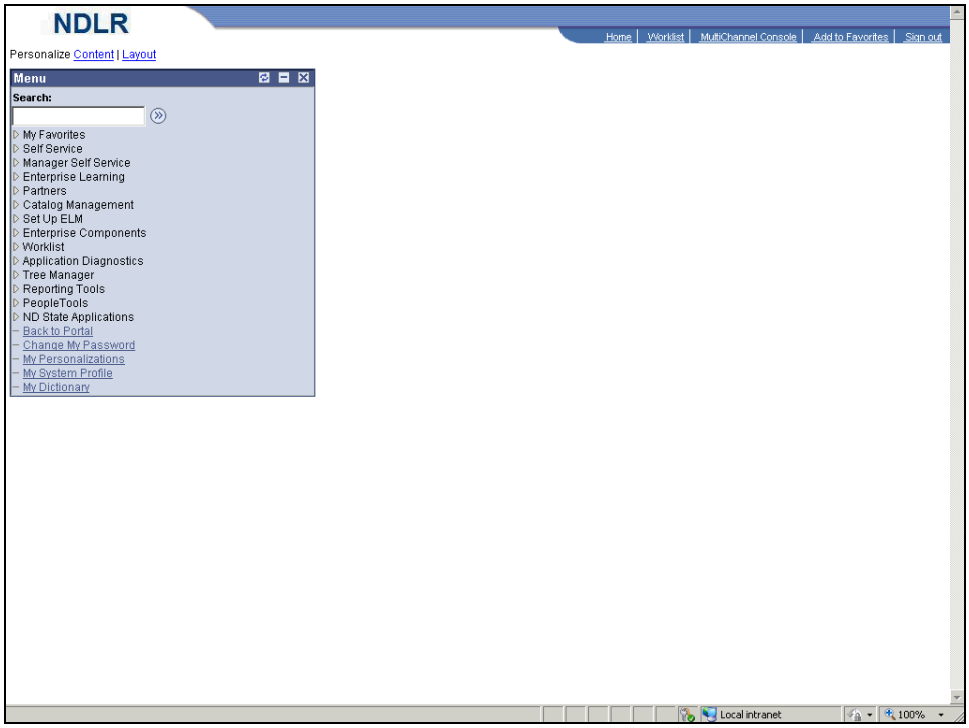
By the end of this topic, you should be able to:

- Navigate to the **All Learning - Find Learners** page.
- View a learners entire learning history.

Step	Action
1.	Begin by navigating to the **All Learning - Find Learners** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

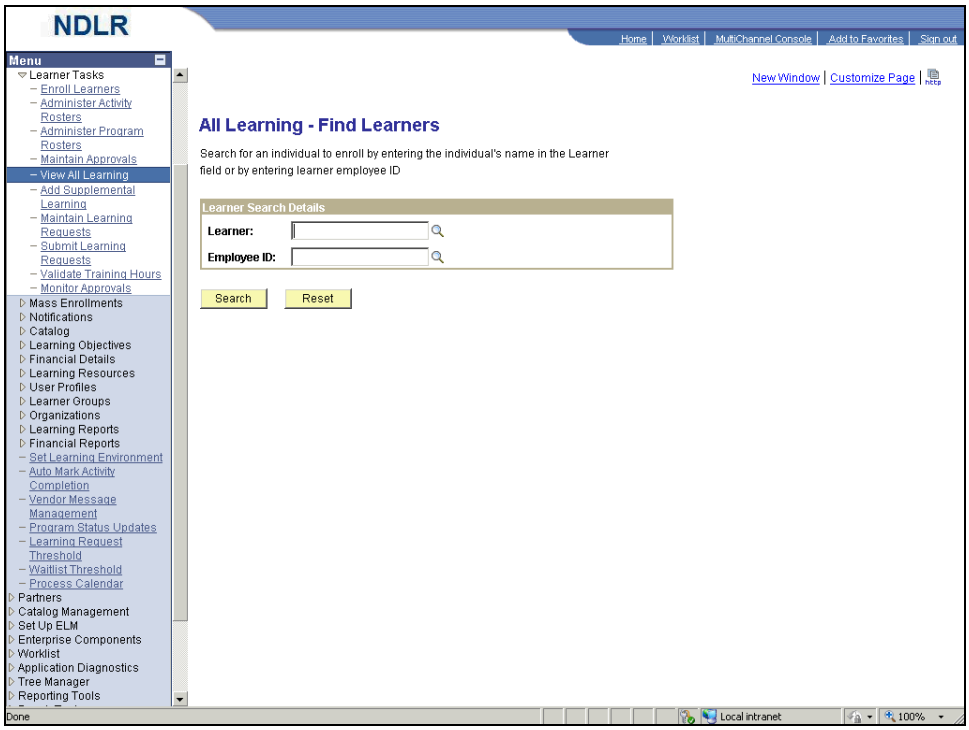


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

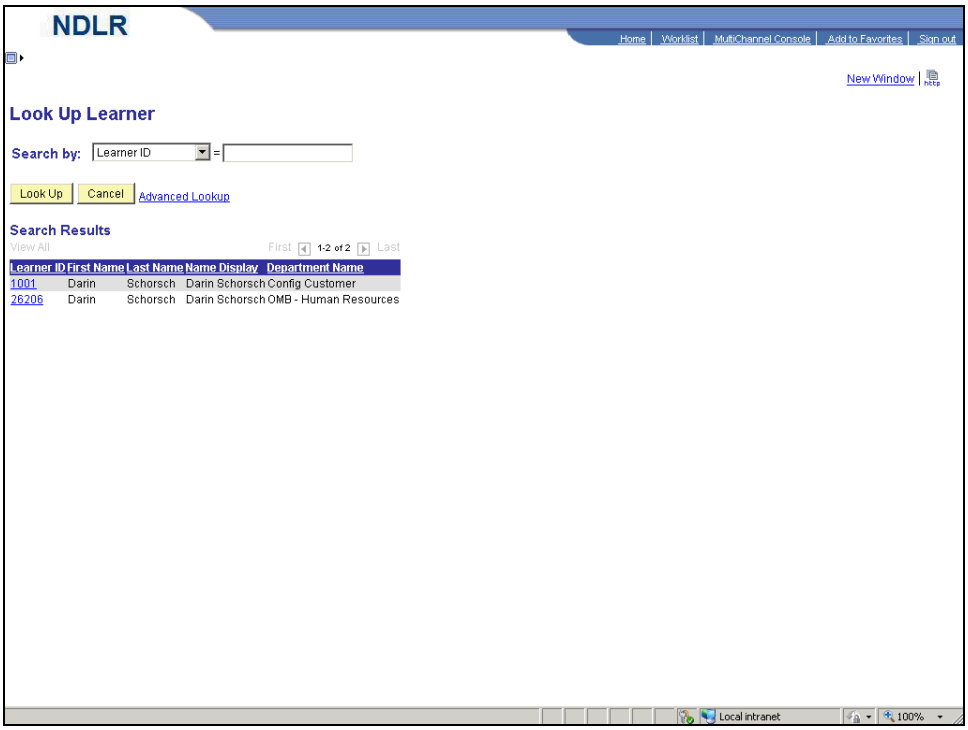


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

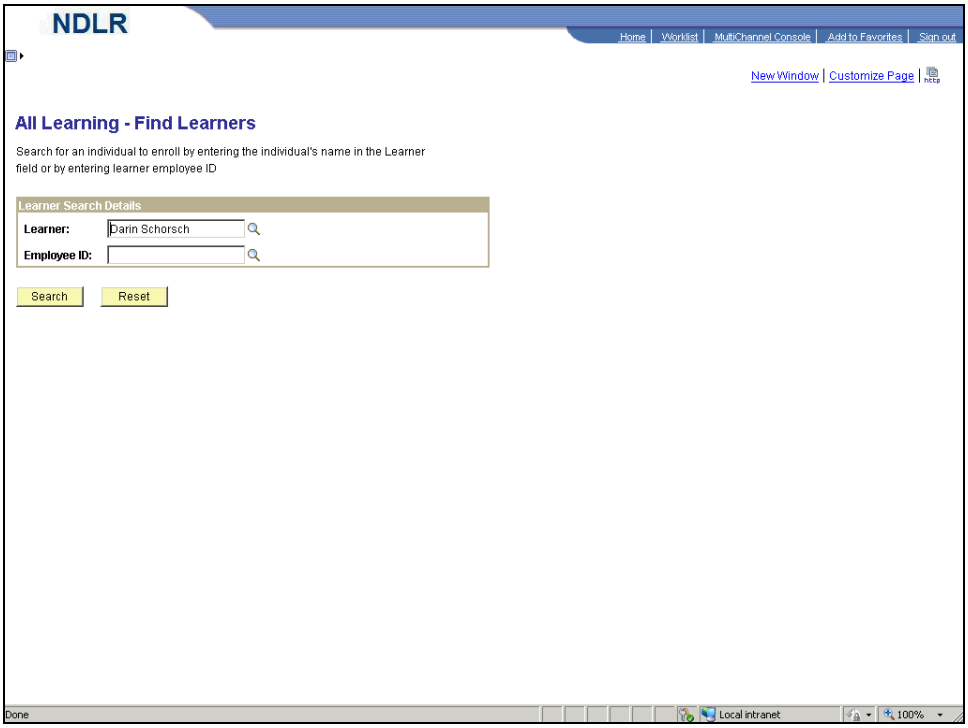
Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **View All Learning** link. – View All Learning



Step	Action
7.	Click the **Collapse Menu** button.
8.	Click in the **Learner** field.
9.	Enter the desired information into the **Learner** field. Enter "**Darin Schorsch**".
10.	Click the **Learner Lookup** button.



Step	Action
11.	Click the "**26206**" link. 26206



Step	Action
12.	Click the **Search** button. Search
13.	Click the **Select** button. Select
14.	The **Learner View** page allows you to view a learners entire learning history.
15.	Notice the different status' for each activity.
16.	**Congratulations**! You should now be able to: - Navigate to the **All Learning - Find Learners** page. - View a learners entire learning history. **End of Procedure.**

8.2 Viewing Learner Transcripts

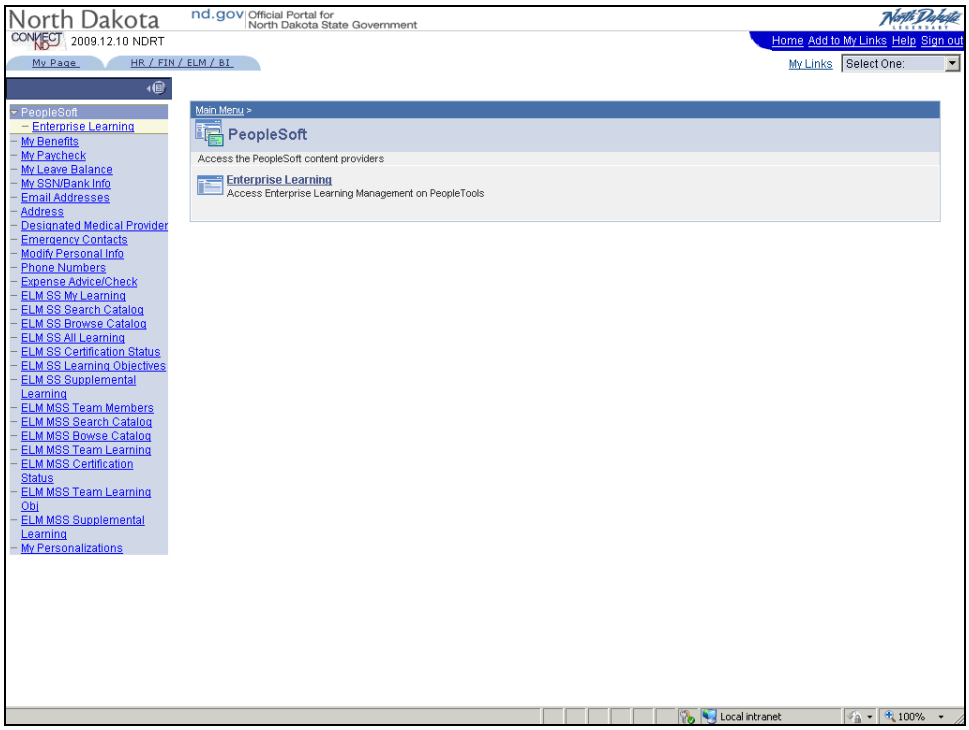
Administrators can use the Enterprise Learning Management system to view a listing of the learning activities, programs, supplemental learning and learning requests associated with any Learner within the Administrators learning environment.

Procedure

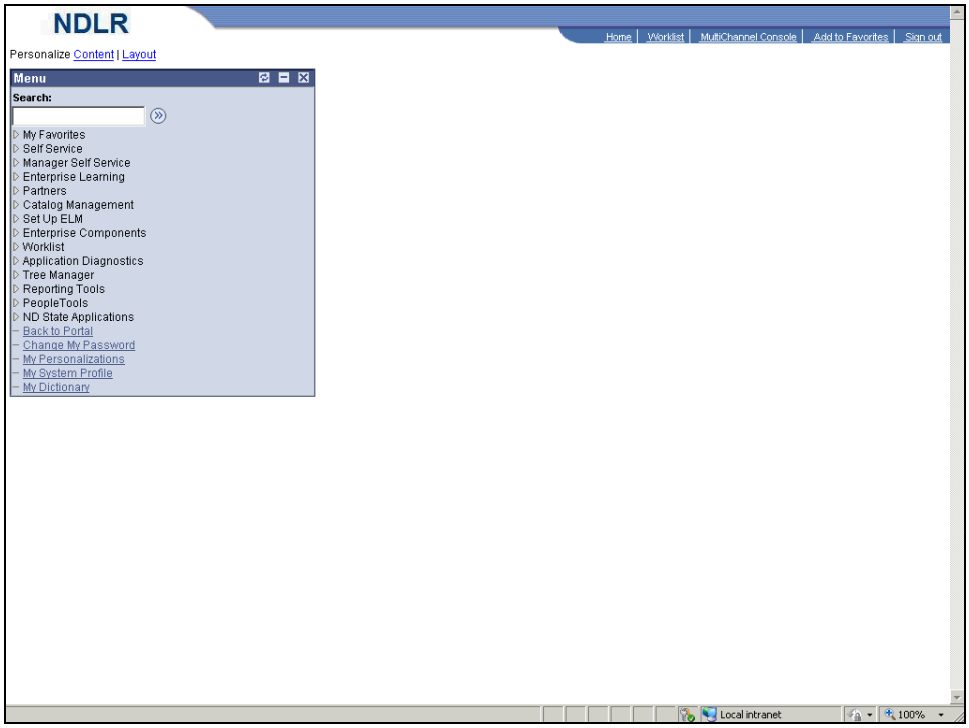
By the end of this topic, you should be able to:

- Navigate to the **All Learning - Find Learners** page.
- View a learners transcript.

Step	Action
1.	Begin by navigating to the **All Learning - Find Learners** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

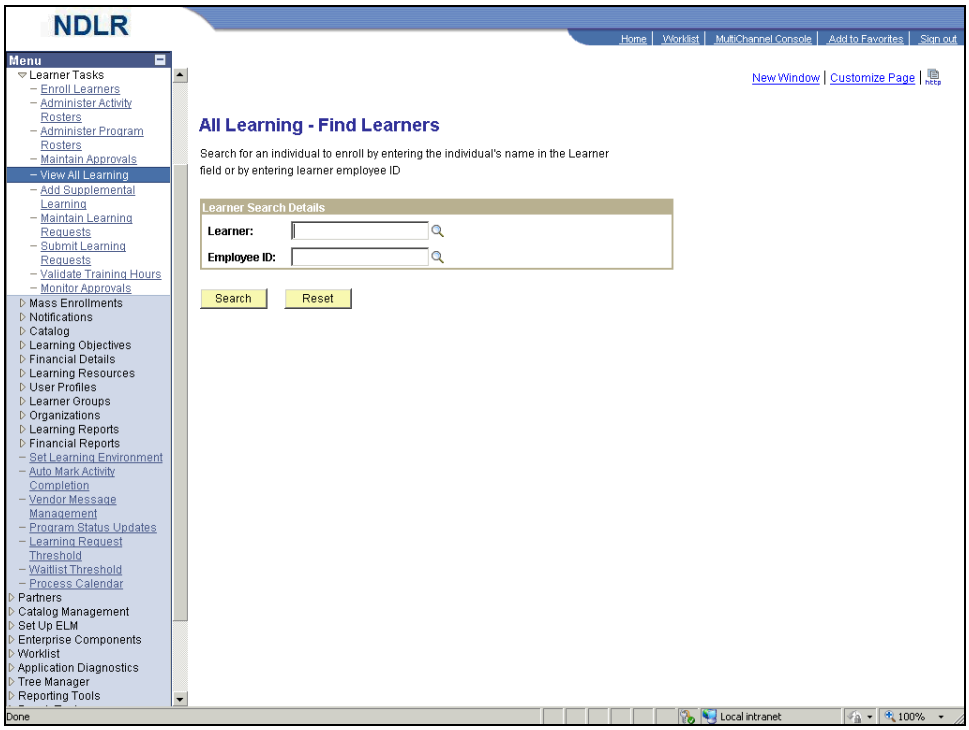


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

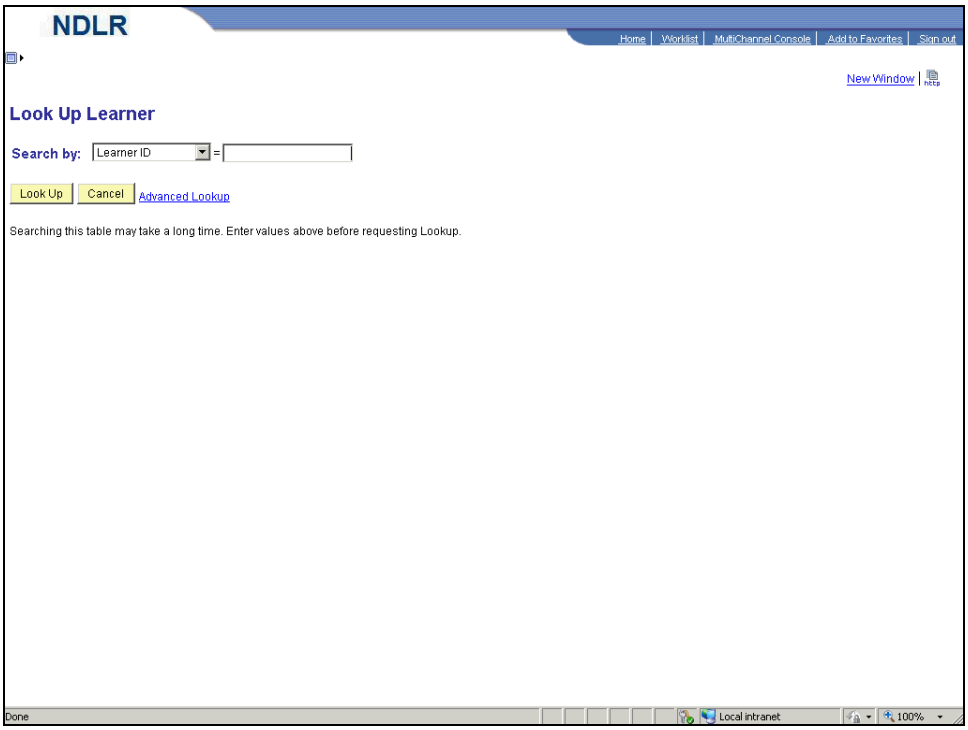


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

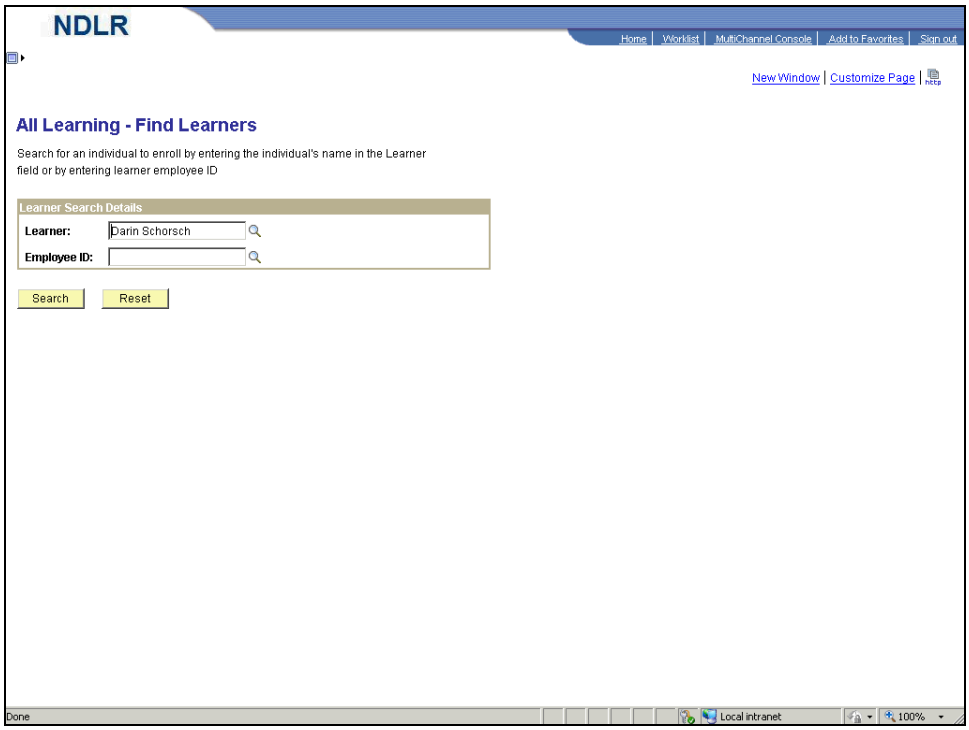
Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **View All Learning** link. – View All Learning



Step	Action
7.	Click the **Collapse Menu** button.
8.	Click the **Learner Lookup** button.



Step	Action
9.	Enter the desired information into the **=** field. Enter "**1001**".
10.	Click the **Look Up** button. Look Up
11.	Select the "**1001**" link. 1001



Step	Action
12.	Click the **Search** button. Search
13.	Click the **Select** button. Select
14.	The **Learner View** page allows you to review a learners entire learning history.
15.	Using the **Search Filter** drop-down list allows you to set parameters on the type of information that will display (i.e., you can select to view only those activities that have been completed).
16.	**Congratulations**! You should now be able to: - Navigate to the **All Learning - Find Learners** page. - View a learners transcript. **End of Procedure.**

8.3 Viewing Teaching Schedules

The Enterprise Learning Management system enables instructors to coordinate their schedules by providing an instructor view of the teaching schedule.

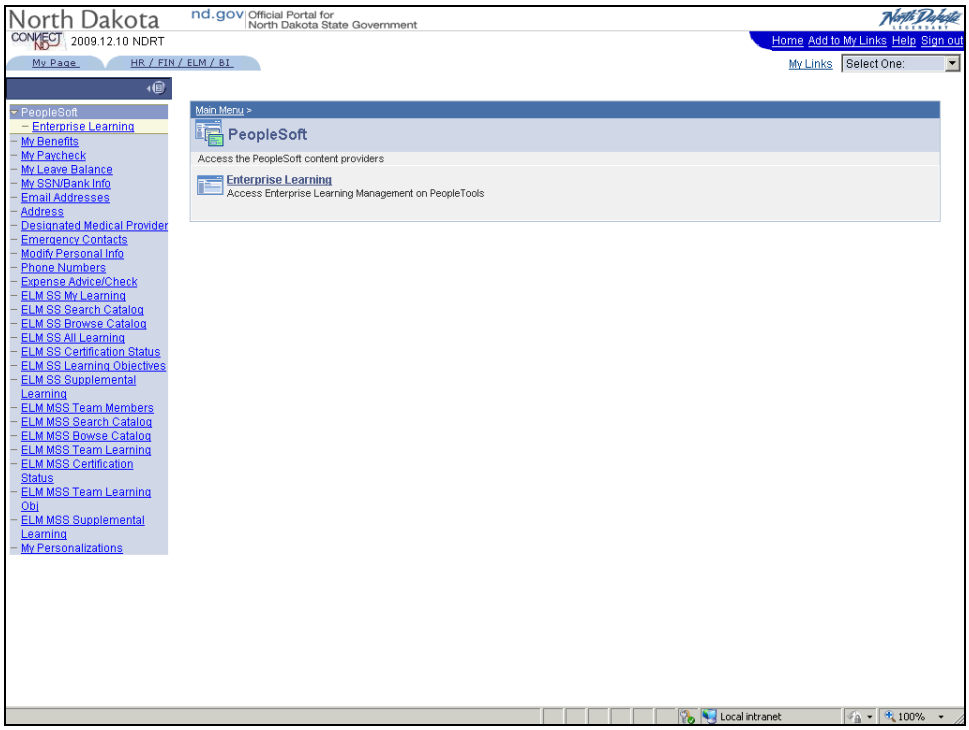
Procedure

By the end of this topic, you should be able to:

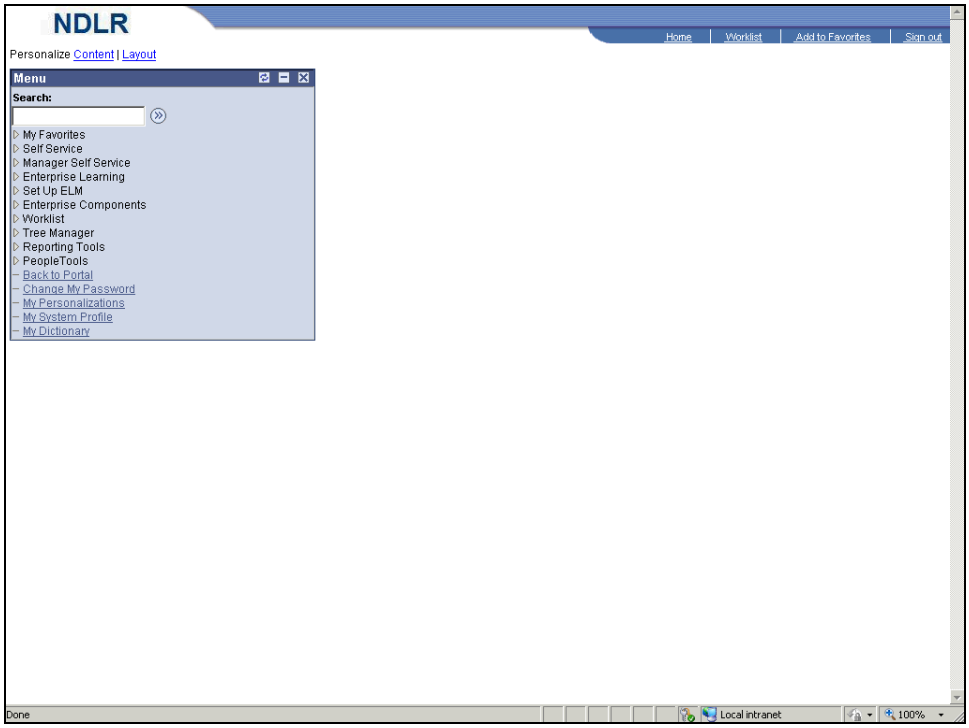
- Navigate to the **View Schedule** page.

- View teaching schedules.

Step	Action
1.	Begin by navigating to the **View Schedule** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

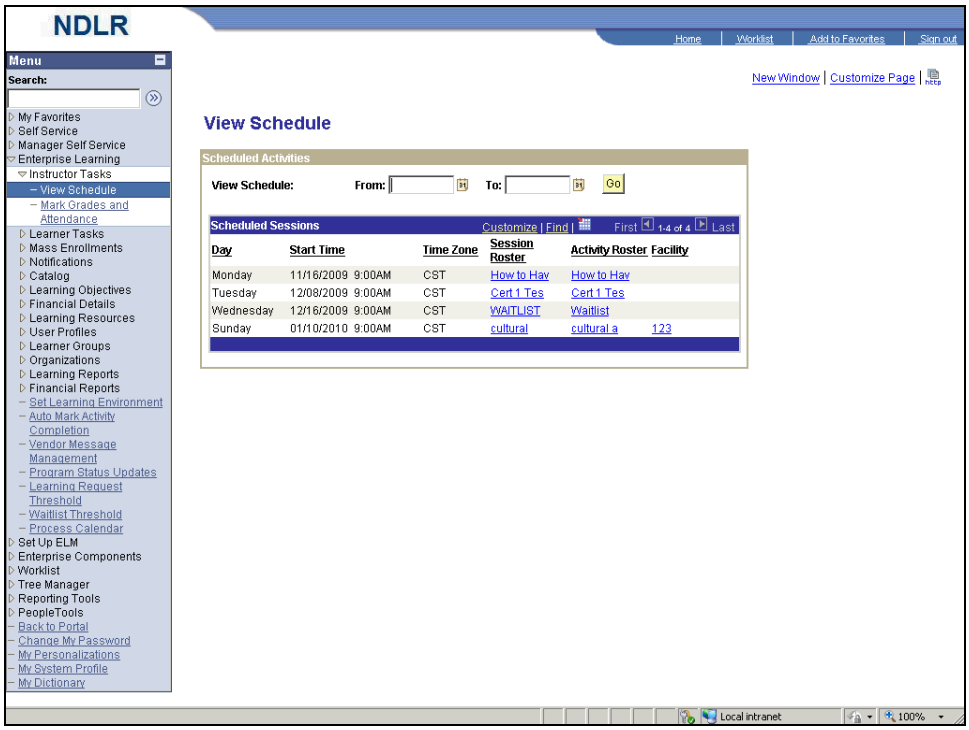


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning



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

Step	Action
5.	Click the **Instructor Tasks** link. ▷ Instructor Tasks
6.	Click the **View Schedule** link. – View Schedule



Step	Action
7.	Click the **Collapse Menu** button.
8.	Use the **View Schedule** page to search for and view a list of sessions you are scheduled to teach and access activity rosters.
9.	Click in the **From** field.
10.	Enter the desired information into the **From** field. Enter "**12/07/2009**".
11.	Click in the **To** field.
12.	Enter the desired information into the **To** field. Enter "**01/10/2010**".
13.	Click the **Go** button.

Step	Action
14.	Use the **Scheduled Sessions Group** box to view scheduled sessions and to access information for the sessions. The information that the system displays will vary depending on a users security permissions. Instructors will only see the sessions they are instructing. **Note**: This component is not available for Administrators.
15.	The **Session Roster** and **Activity Roster** links open component and activity roster pages.
16.	Click the **123** link. 123
17.	Use the **Schedule** page to view a detailed schedule for a selected classroom session. Clicking on the **Location** link opens the **Session Facility Detail** page where you can view: * The physical address. * Attachments that have been associated with the facility. * The list of equipment that has been assigned to the room. * Accommodations defined for the room, such as wheelchair access.

Step	Action
18.	Click the **Bismarck, ND** link. Bismarck, ND

Step	Action
19.	Notice the full address is now displayed.
20.	**Congratulations**! You should now be able to: - Navigate to the **View Schedule** page. - View teaching schedules. **End of Procedure.**

8.4 Sending Notifications from Roster

Administrators will have the ability to send notifications to any learner enrolled in a specific activity.

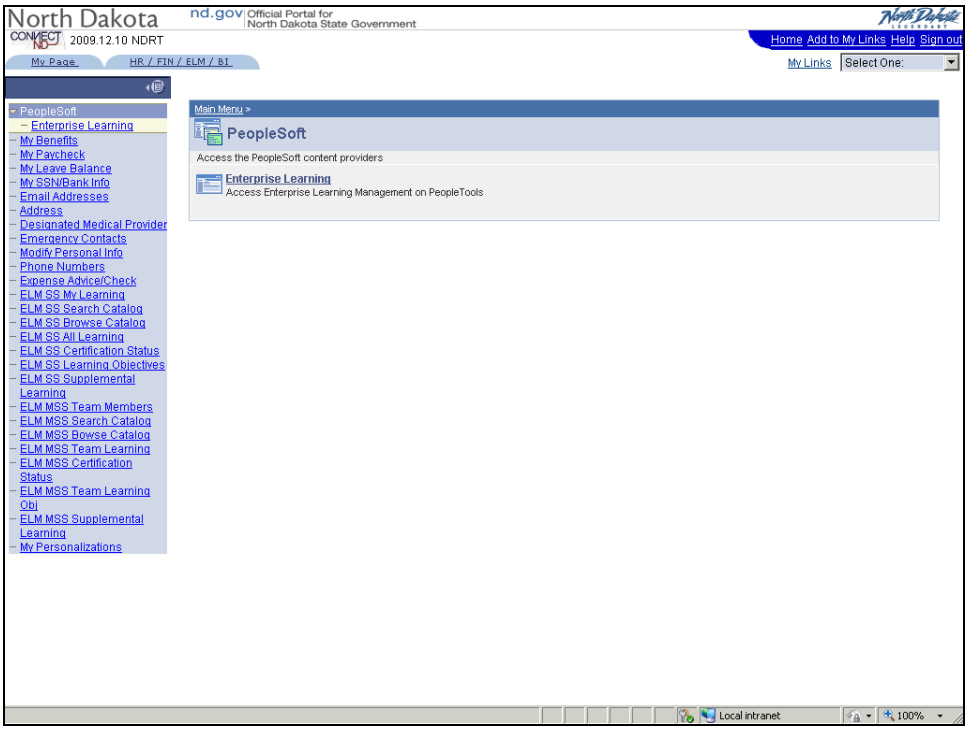
Procedure

By the end of this topic, you should be able to:

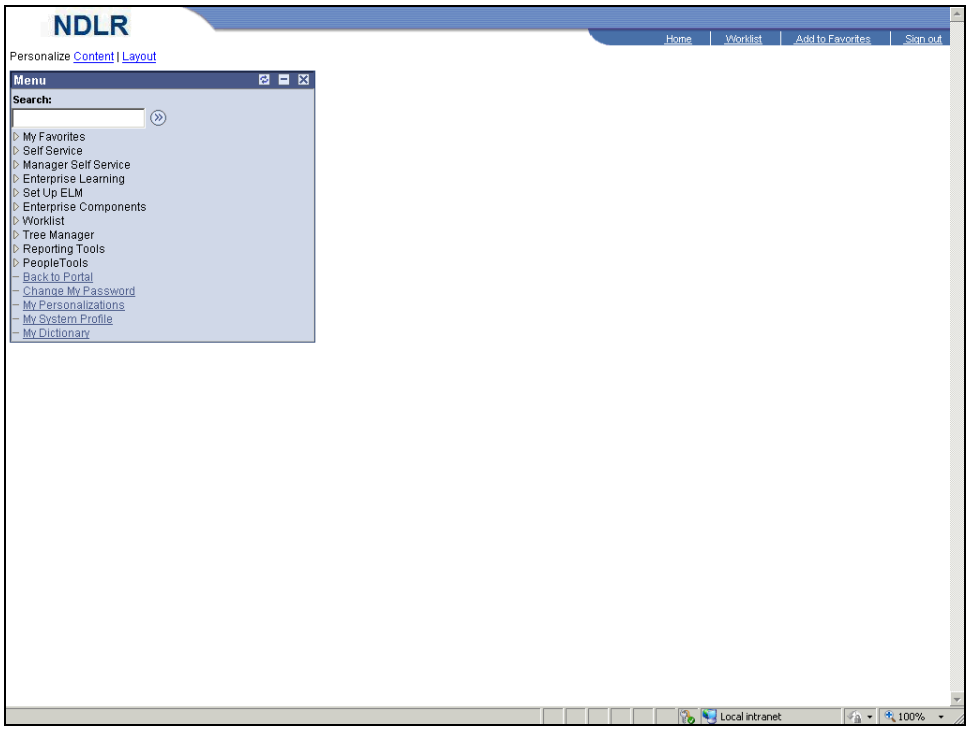
- Navigate to the **Administer Activity Roster** page.
- Send notifications from the roster.

Step	Action
1.	Begin by navigating to the **Administer Activity Roster** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI

Step	Action
2.	Click the **PeopleSoft** link. PeopleSoft

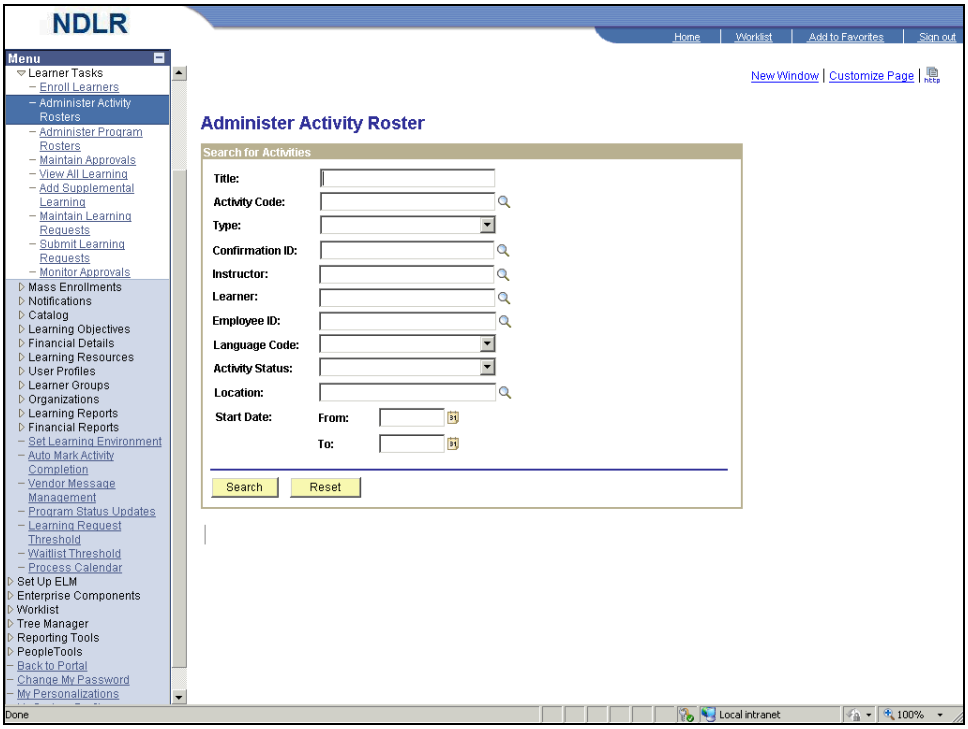


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning



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

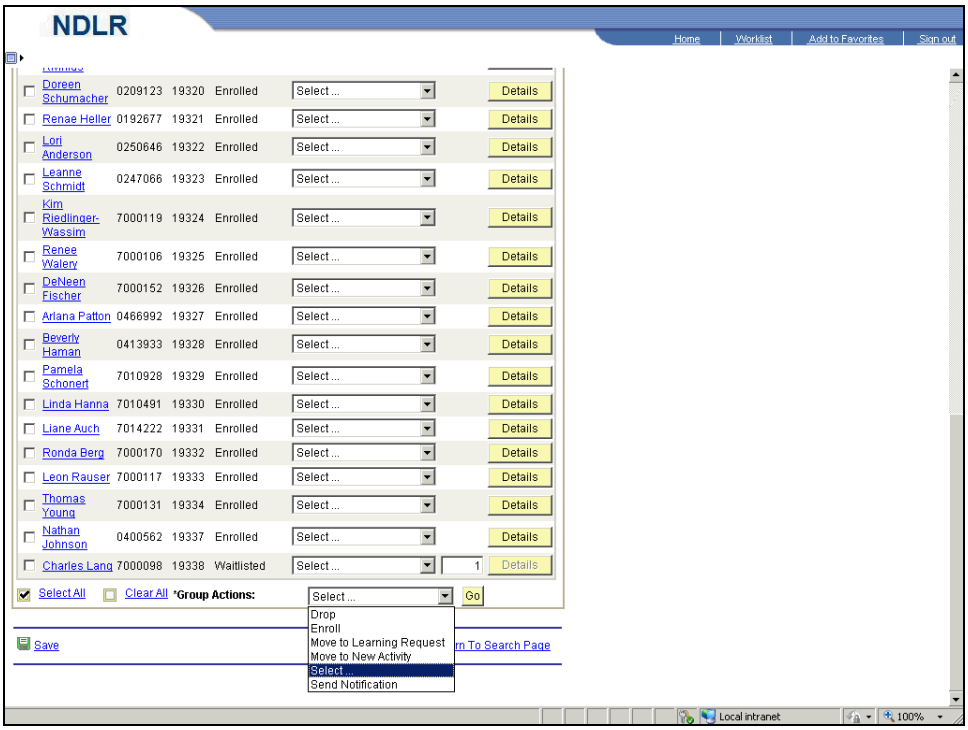
Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Administer Activity Rosters** link.



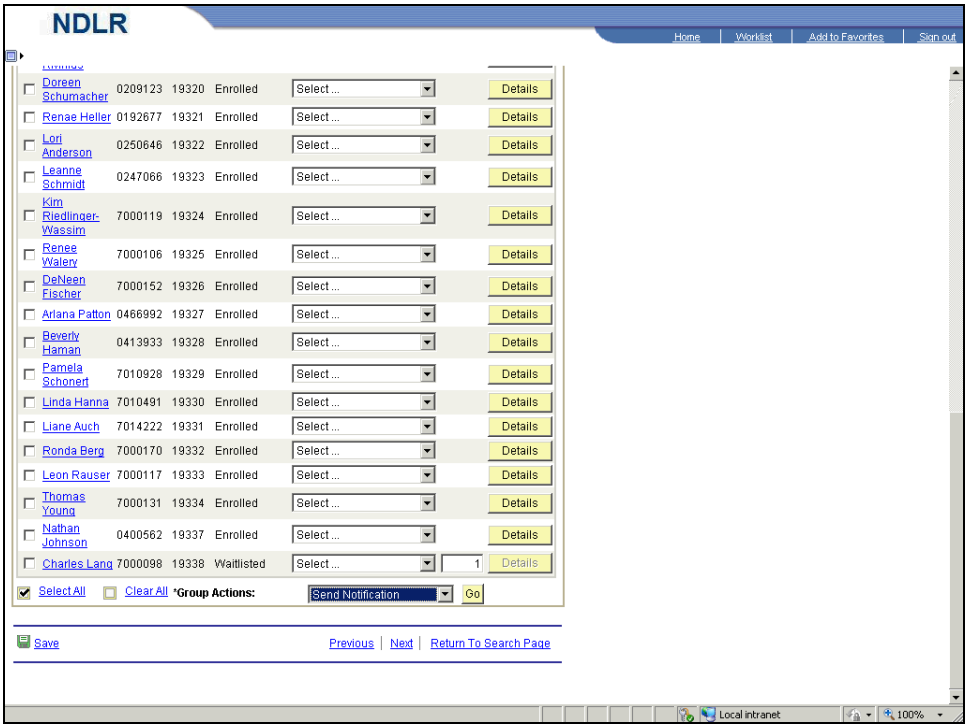
Step	Action
7.	Click the **Collapse Menu** button. ⊟
8.	The **Administer Activity Roster** page will allow you to search for an **Activity Roster** using one of the search criteria fields. In this example, you will be searching by Title.
9.	Click in the **Title** field.
10.	Enter the desired information into the **Title** field. Enter "**Cultural Awareness**".
11.	Click the **Search** button. Search

Step	Action
12.	Click the **Roster** button. Roster

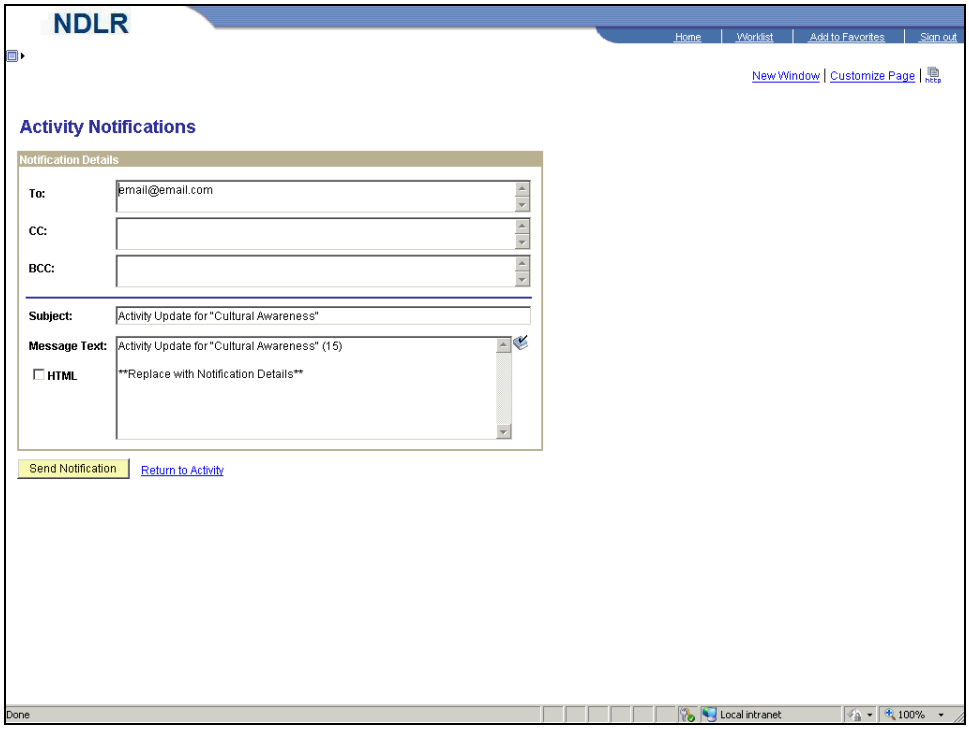
Step	Action
13.	Click the **Deepak Kumar** option.
14.	Click the scrollbar.
15.	Click the scrollbar.
16.	Click the **Group Actions** drop-down list.



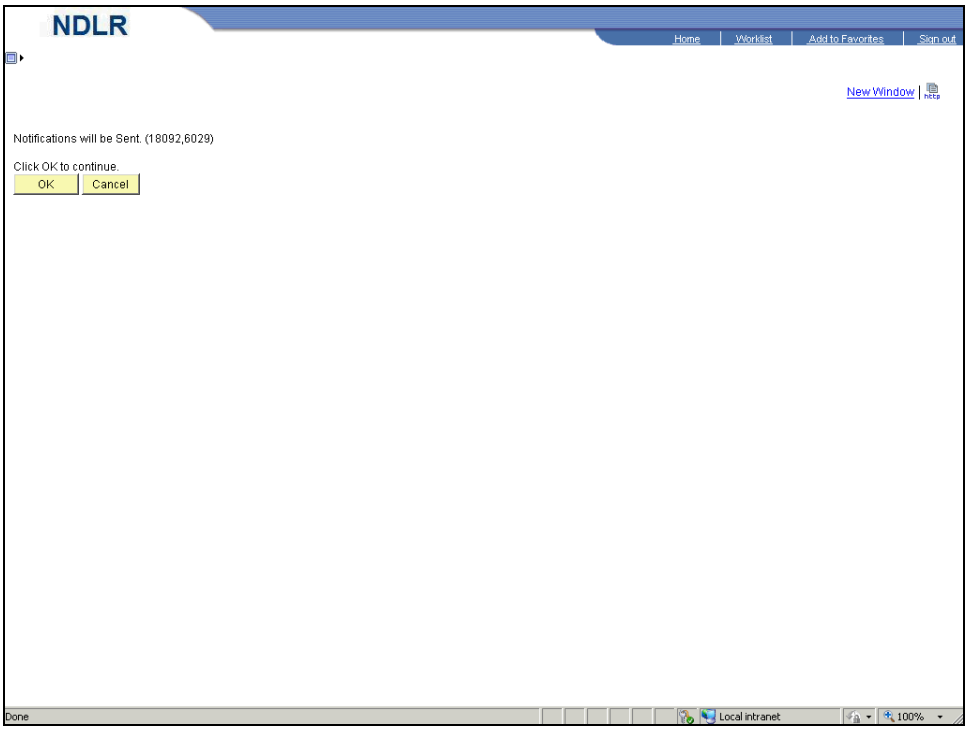
Step	Action
17.	Select the "**Send Notification**" list item. Send Notification



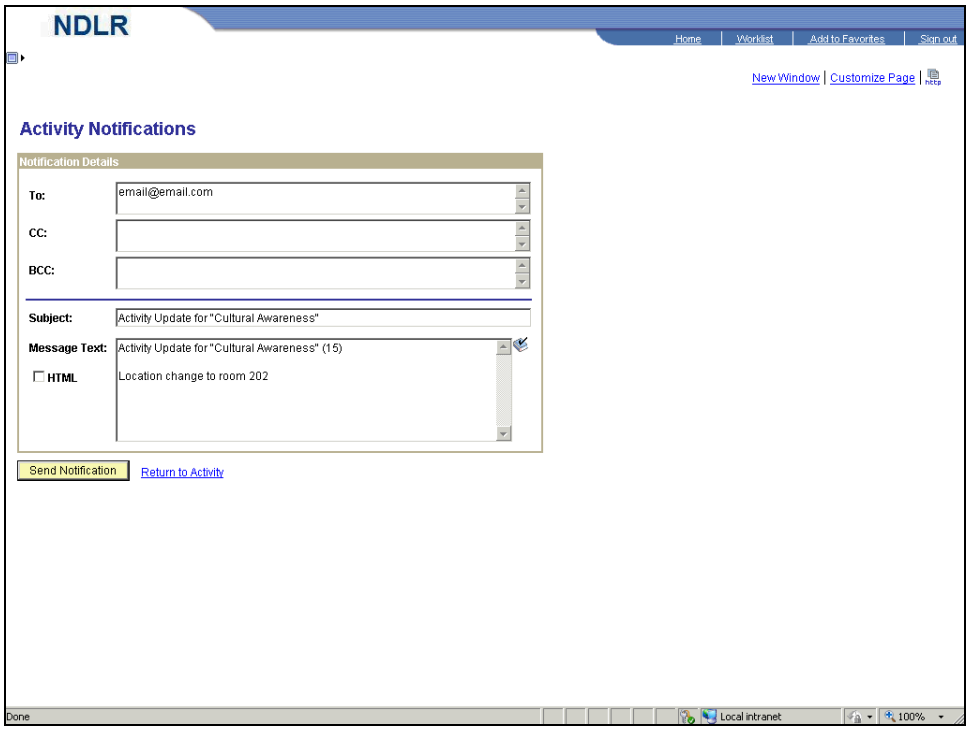
Step	Action
18.	Click the **Go** button. Go



Step	Action
19.	Click in the **Message Text** field.
20.	Press **[Delete]**.
21.	Enter the desired information into the **Message Text** field. Enter "**Location change to room 202**".
22.	Click the **Send Notification** button. Send Notification



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



Step	Action
24.	Click the **Return to Activity** link. Return to Activity
25.	**Congratulations**! You should now be able to: - Navigate to the **Administer Activity Roster** page. - Send notifications from the roster. **End of Procedure.**

8.5 Marking Grades and Attendance

The **Enterprise Learning Management** system provides activity rosters that Administrators and Instructors can use to manage attendance and grading for learning activities. Tracking activity completion, grades and scores through ELM will be done manually. Manually enter grades through an administrator or instructor roster.

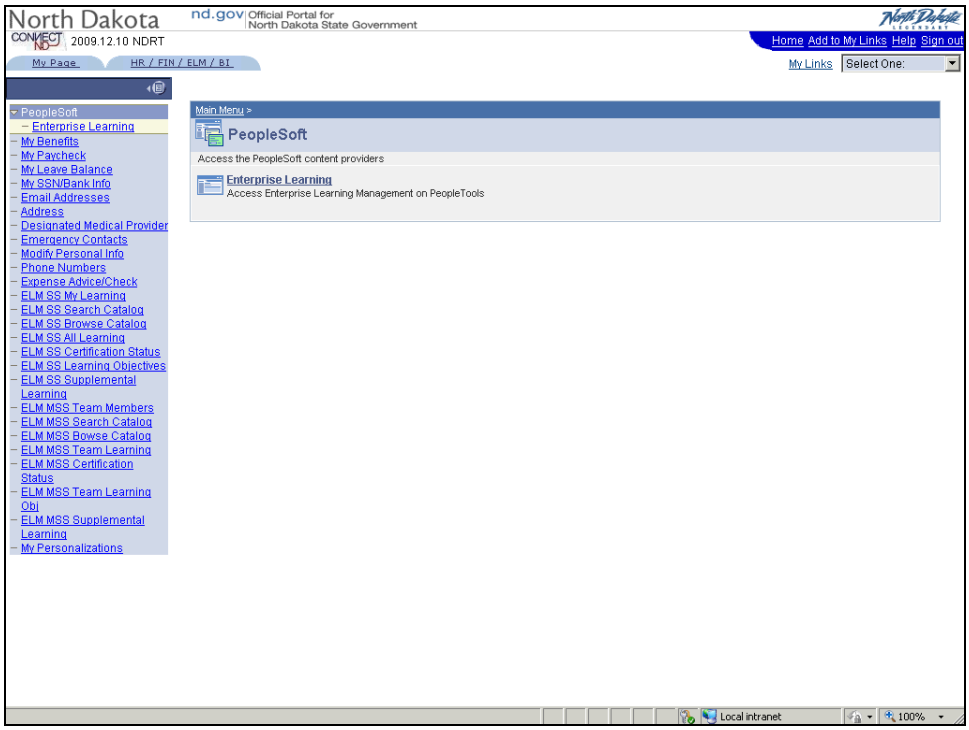
Note: If taking an online courses that is **SCORM** compliant, which is the standard way web based training is provided, the system will automatically update the learners grade as "Completed".

Procedure

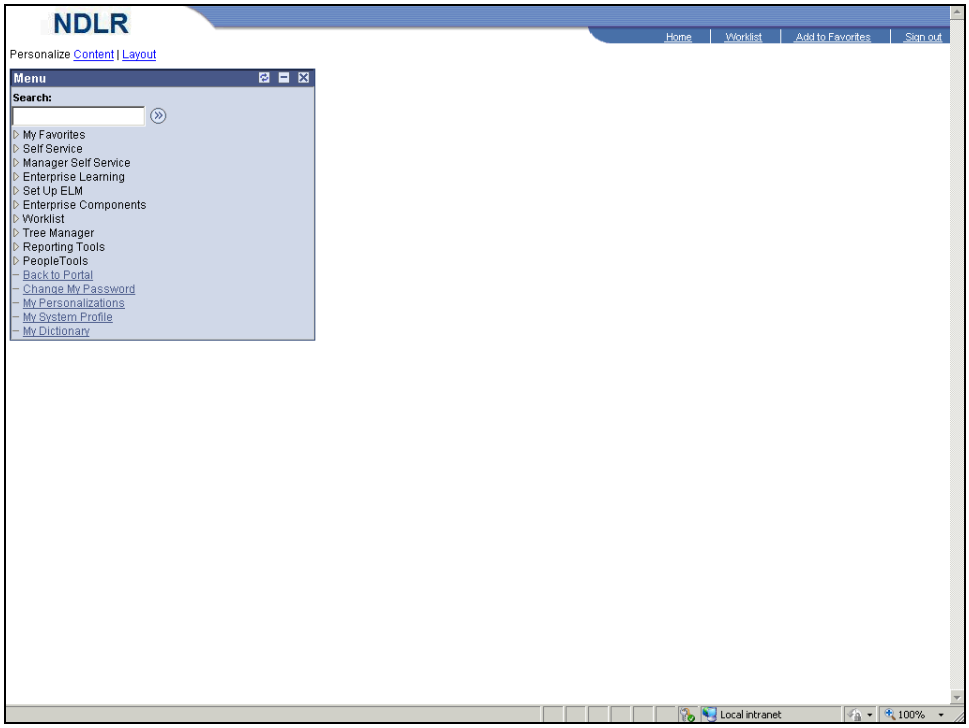
By the end of this topic, you should be able to:

- Navigate to the **Administer Activity Roster** page.
- Mark grades and attendance.

Step	Action
1.	Begin by navigating to the **Administer Activity Roster** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

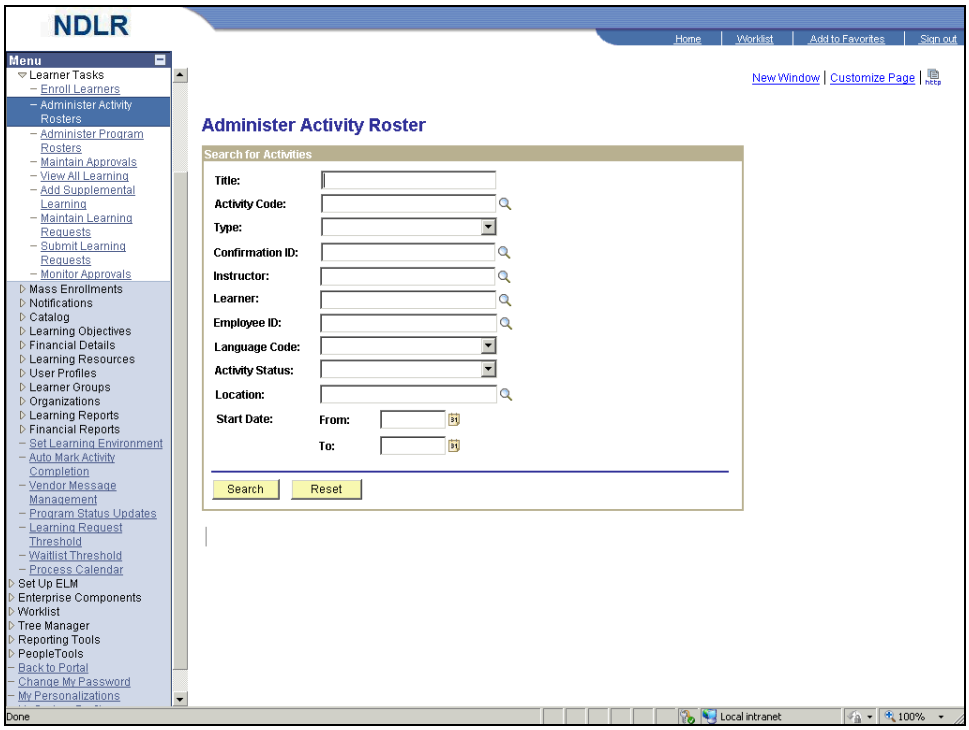


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning



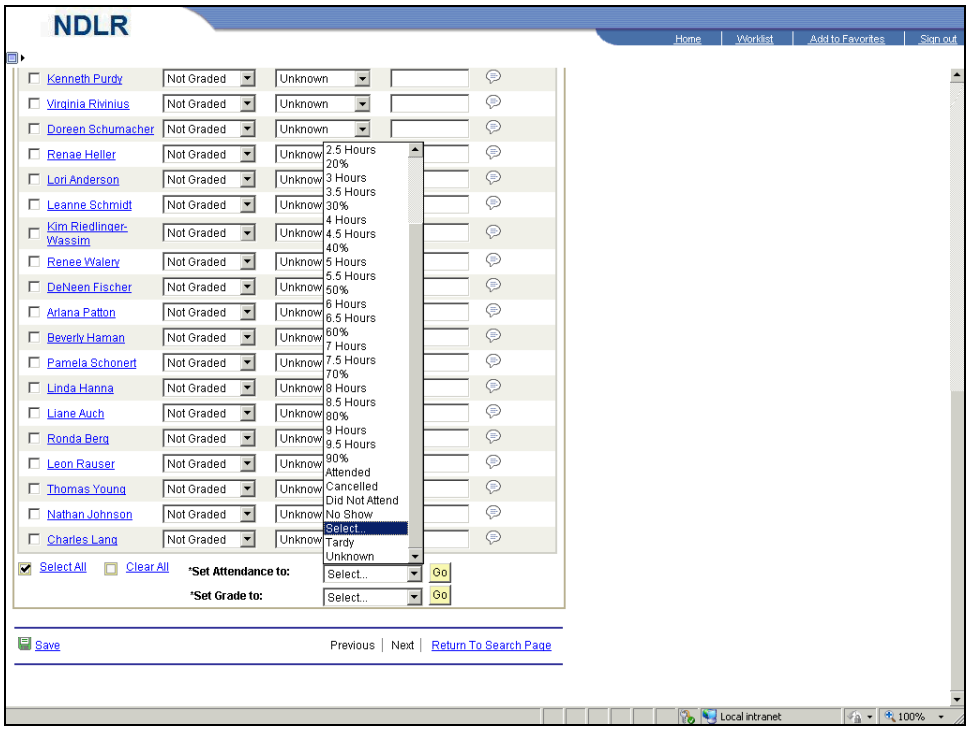
Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

Step	Action
5.	Click the **Learner Tasks** link. ▷ Learner Tasks
6.	Click the **Administer Activity Rosters** link.

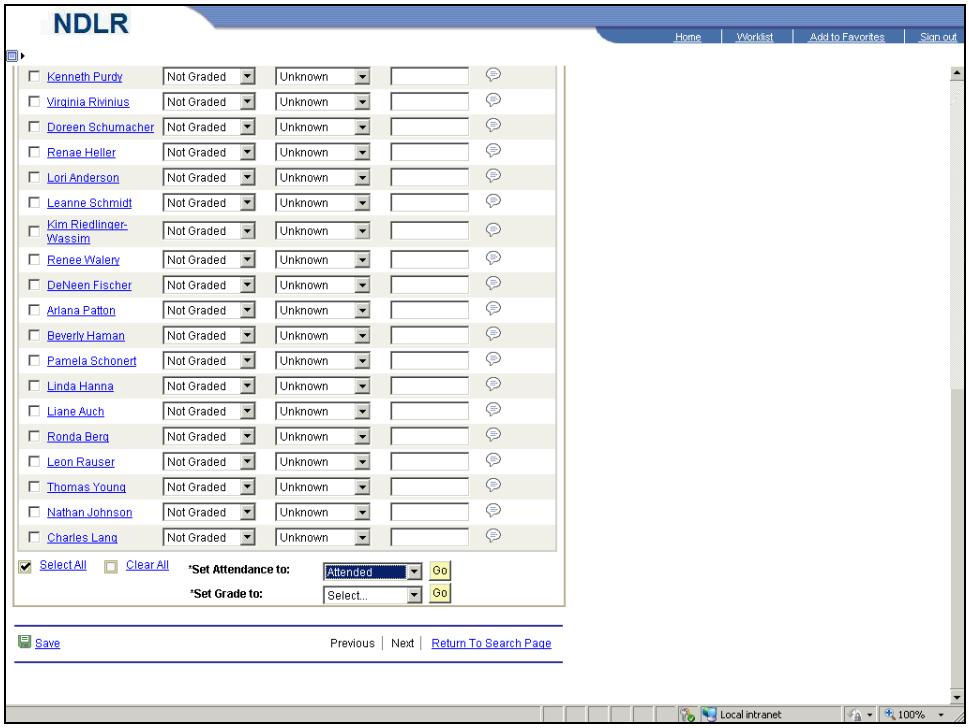


Step	Action
7.	Click the **Collapse Menu** button.
8.	The **Administer Activity Roster** page will allow you to search for an **Activity Roster** using one of the search criteria fields. In this example, you will be searching by Activity Code.
9.	Click in the **Activity Code** field.
10.	Enter the desired information into the **Activity Code** field. Enter "**15**".
11.	Click the **Search** button. Search
12.	Click the **Roster** button. Roster

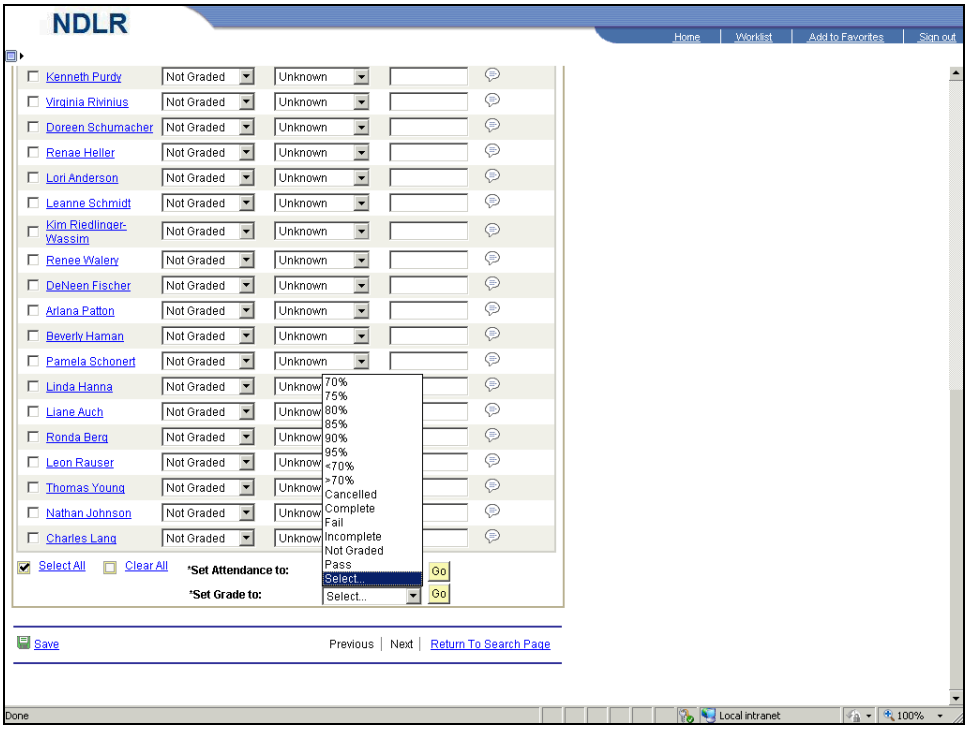
Step	Action
13.	Click the **Grades and Attendance** link. Grades and Attendance
14.	Click the "**Julie Kennedy**" option.
15.	Click the "**Deepak Kumar**" option.
16.	Click the scroll bar.
17.	Click the scroll bar.
18.	Click the **Set Attendance to** drop-down list.



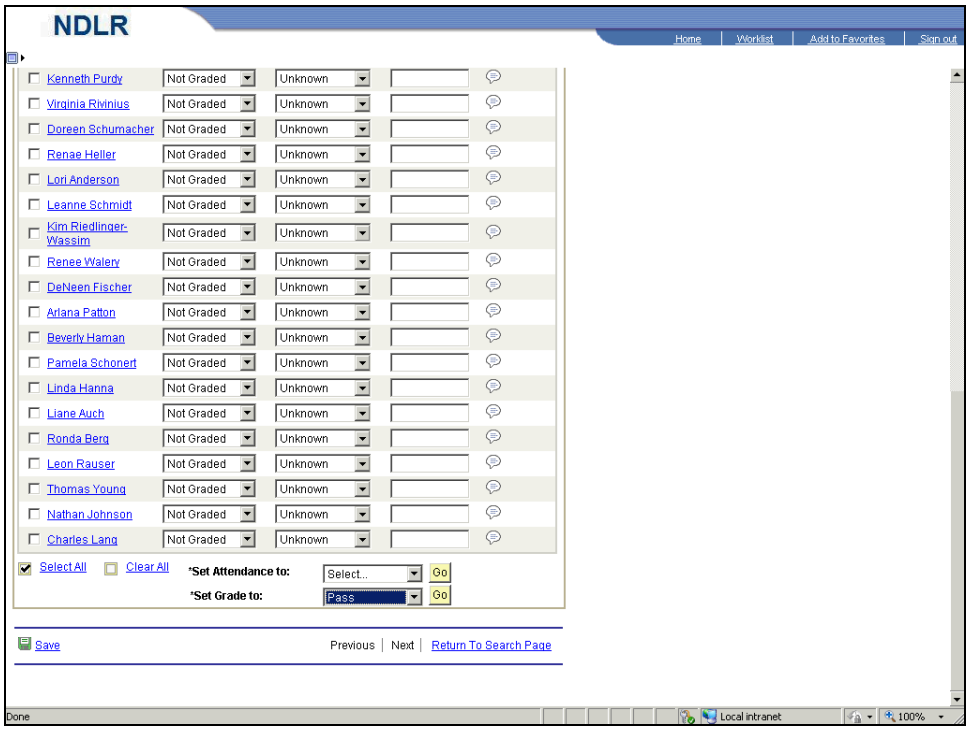
Step	Action
19.	Select the "**Attended**" list item. Attended



Step	Action
20.	Click the **Go** button.
21.	Click the **Set Grade to** drop-down list.



Step	Action
22.	Select the "**Pass**" list item.



Step	Action
23.	Click the **Go** button. Go
24.	Click the scroll bar.
25.	Notice the **Grade** and **Attendance** fields for Julie Kennedy and Deepak Kumar have been updated.
26.	Click the **Save** link. Save
27.	**Congratulations**! You should now be able to: - Navigate to the **Administer Activity Roster** page. - Mark grades and attendance. **End of Procedure.**

Lesson 9: Running Reports

9.1 Running ELM Reports

The Process Scheduler's primary role is to support the PeopleSoft application environment. It is used to run PeopleSoft processes, including programs, batch programs and reports. There are several advantages to using Process Scheduler to run reports. This lesson focuses only on running reports and not on any other types of processes. Because a report is a type of process, these two terms may be used interchangeably, depending upon the context in which they are used.

Using Process Scheduler to run a report is a simple process. Before beginning, it is important to understand a few basic terms related to the Process Scheduler.

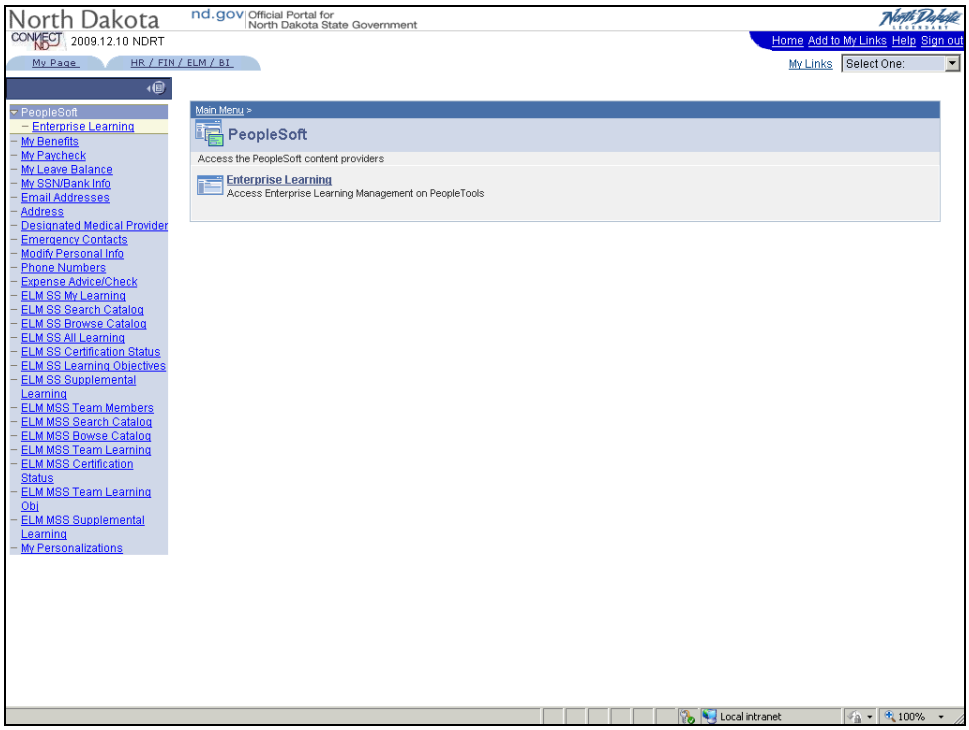
- Process Request ~ A single "run request" such as an SQR or Crystal report.
- Run Control ID ~ A unique ID, associating each operator with his or her own run control table entries.
- Process Instance ~ A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

Procedure

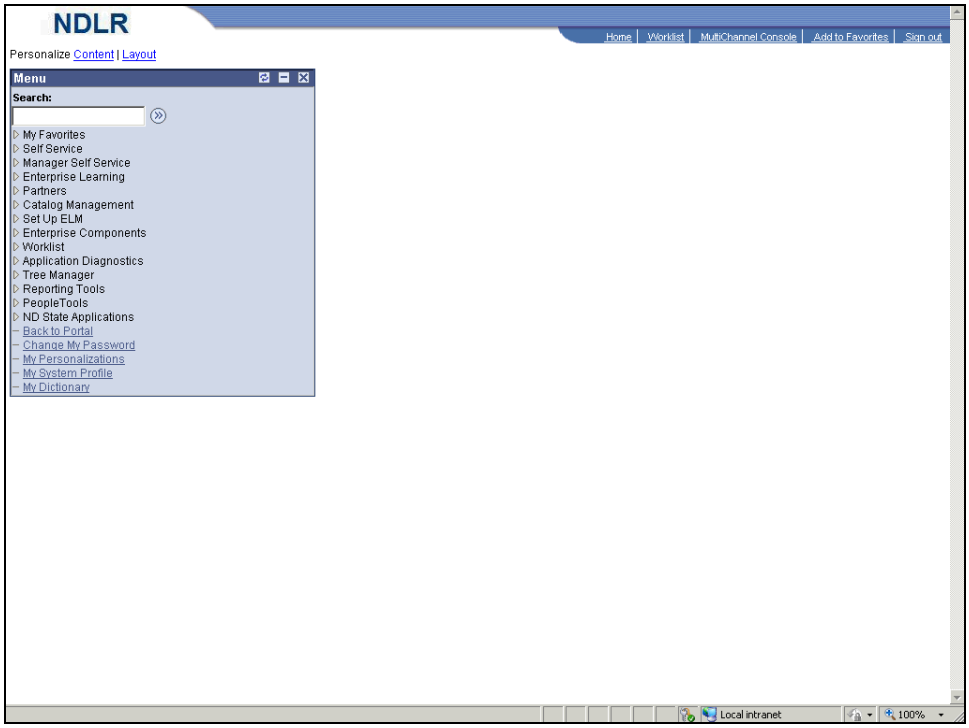
By the end of this topic, you will be able to:

- Navigate to the **NDS Act Signin Rep** page.
- Run the Activity Signin Sheet.

Step	Action
1.	Begin by navigating to the **NDS Act Signin Rpt** page. Click the **HR / FIN / ELM / BI** tab. HR / FIN / ELM / BI
2.	Click the **PeopleSoft** link. PeopleSoft

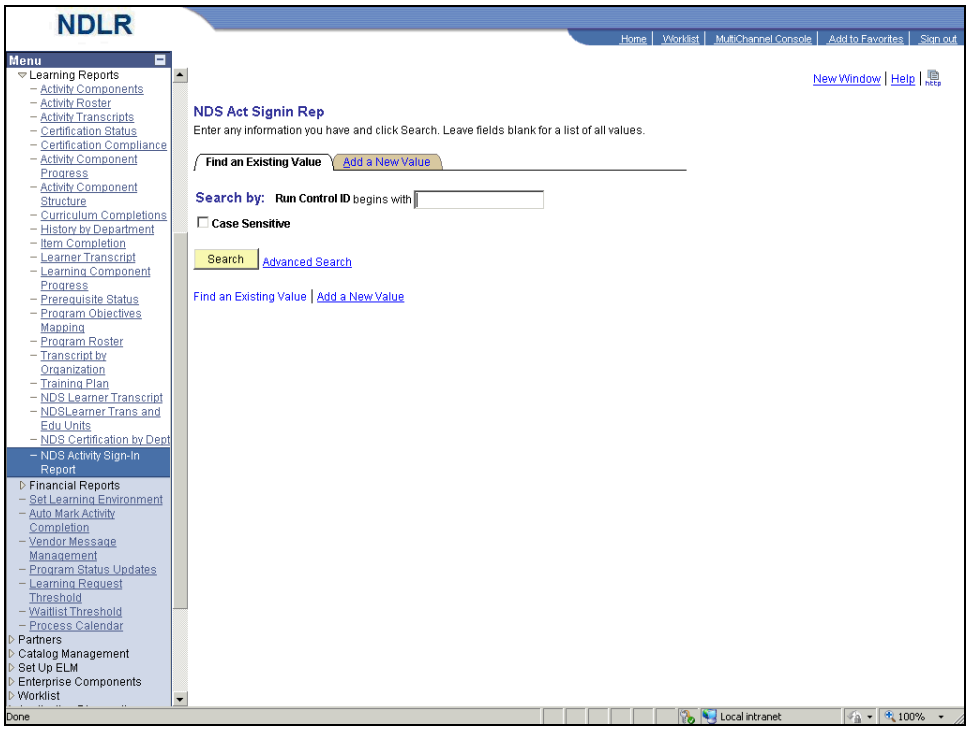


Step	Action
3.	Click the **Enterprise Learning** link. Enterprise Learning

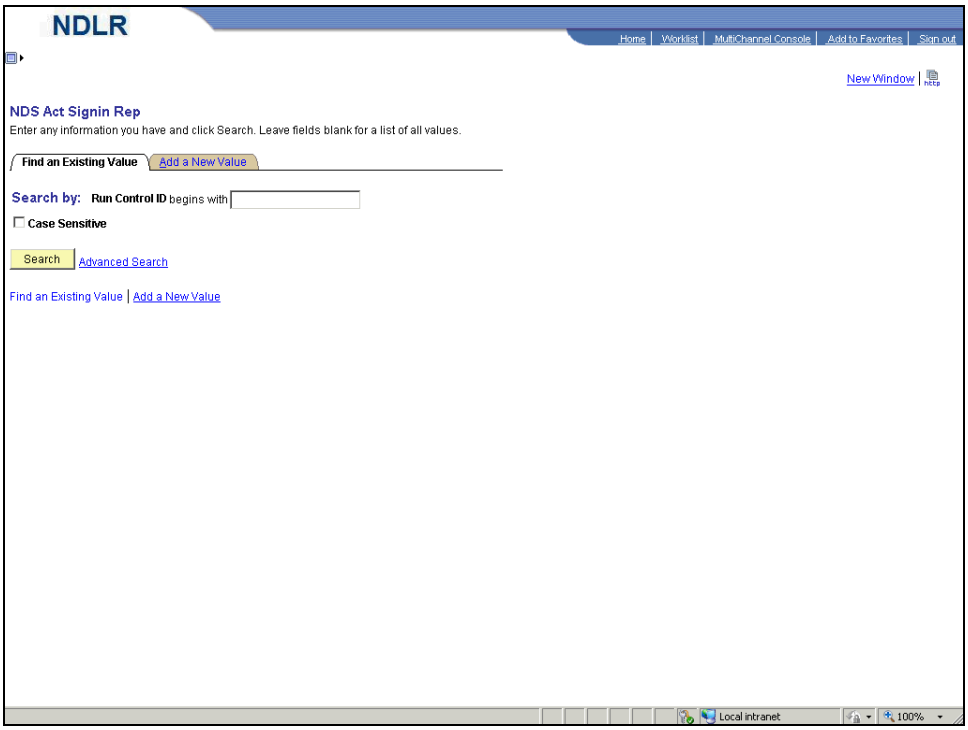


Step	Action
4.	Click the **Enterprise Learning** link. ▷ Enterprise Learning

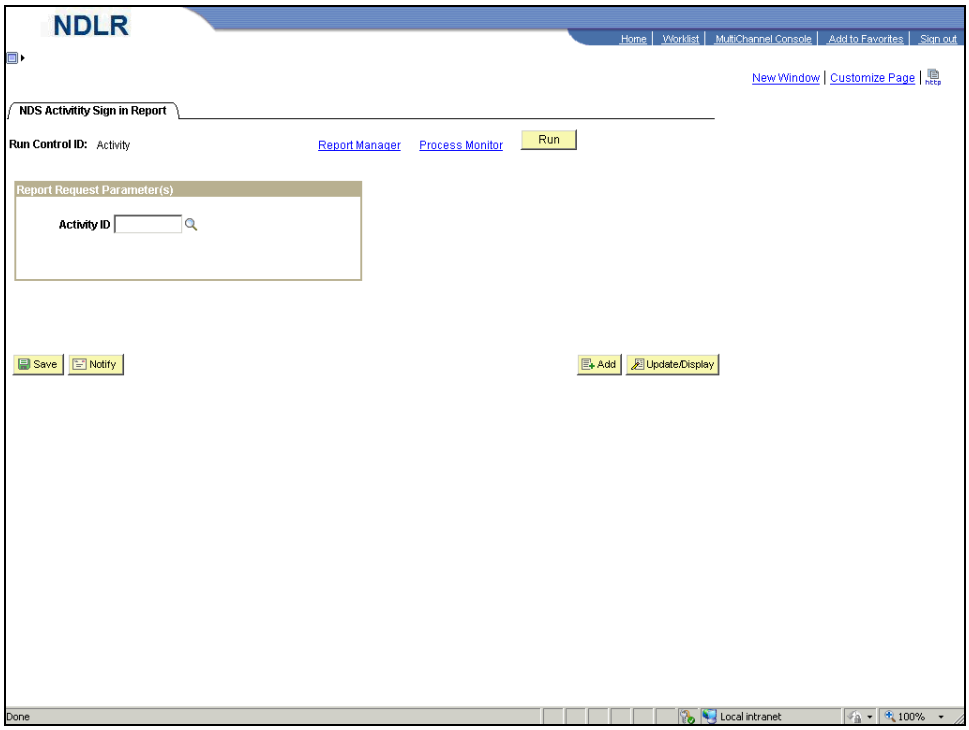
Step	Action
5.	Click the **Learning Reports** link. ▷ Learning Reports
6.	There are currently four custom reports that have been created for ELM: *** NDS Learner Transcript** *** NDS Learner Trans and Edu Units** *** NDS Certification by Dept** *** NDS Activity Sign-In Report**
7.	Click the **NDS Activity Sign-In Report** link.



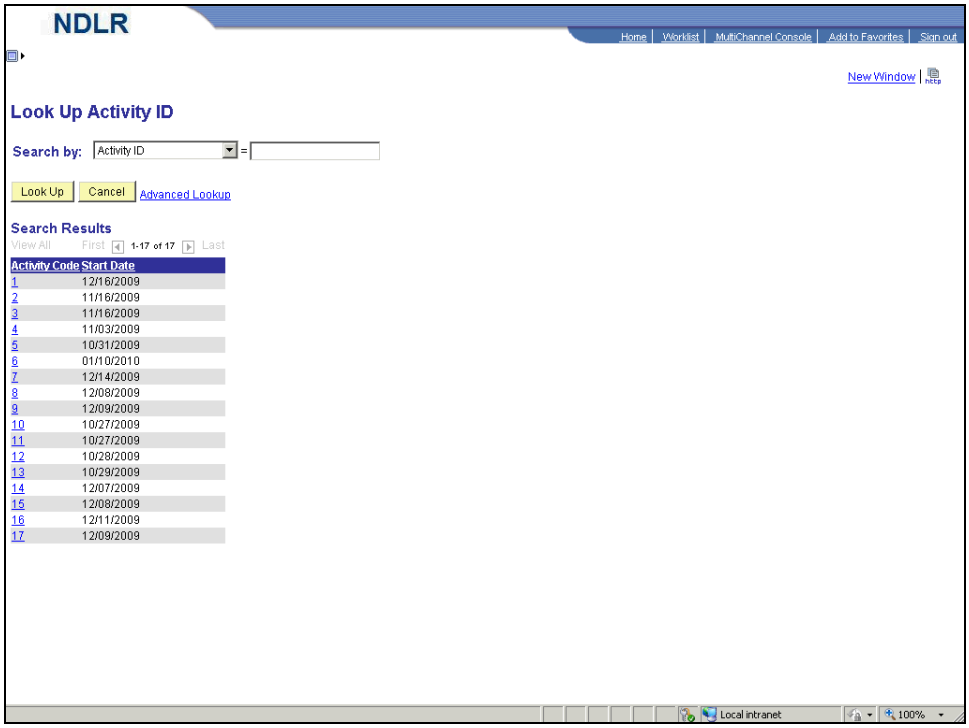
Step	Action
8.	Click the **Collapse Menu** button.
9.	Notice there is a blank **Run Control ID** field. A **Run Control ID** is an identifier that, when paired with your User ID, uniquely identifies the process you are running. The **Run Control ID** defines parameters that are used when a process is run. This ensures that when a process runs in the background, the system does not prompt you for additional values.
10.	You can report the selected report by searching for an existing **Run Control ID** or you can add a new value, thus creating your own **Run Control ID**. The advantage of creating your own is that you can create one that makes sense to you that you will remember for future use. **Run Control ID's** that have been created can be saved along with the set parameters to easily access the report at a later time.



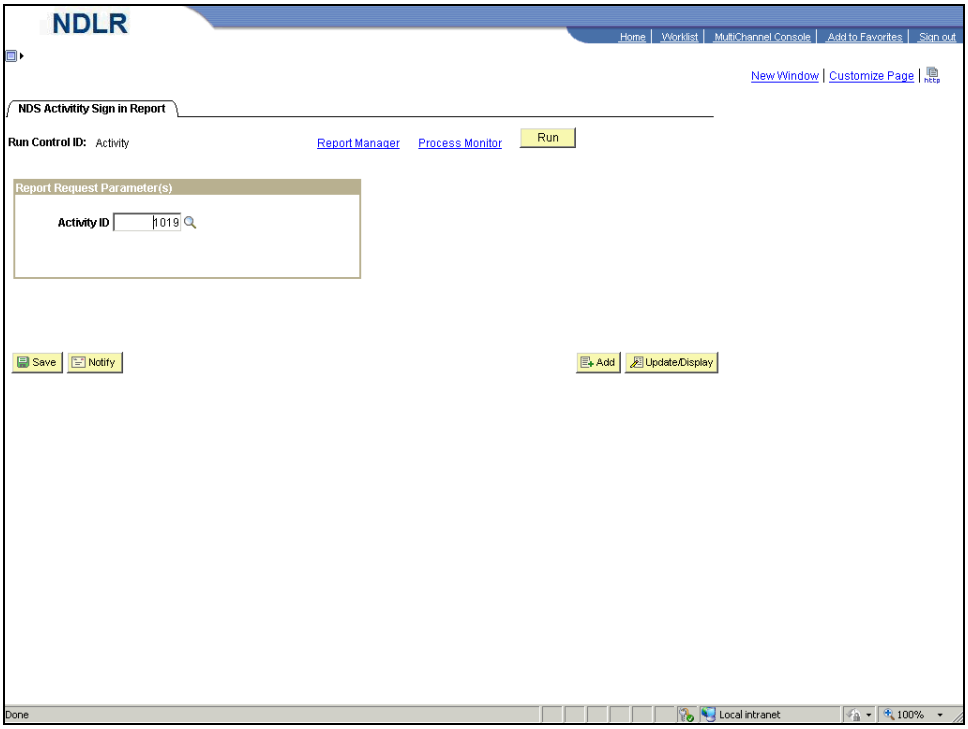
Step	Action
11.	Click the **Add a New Value** tab. Add a New Value
12.	Enter the desired information into the **Run Control ID** field. Enter "**Activity**".
13.	Click the **Add** button. Add
14.	Use the **NDS Activity Sign in** page to enter the request parameters. These parameters will be used to define the processing rules and data to be included when the report is run. The parameters will vary depending on which report you are running.
15.	For this report, you can run the report by **Activity ID** only. In the **Activity ID** field, you must specify the specific activity you want a report produced for. If this field is left blank, the report will not run. **Note**: The Activity ID is the system generated ID that is assigned when creating an activity.



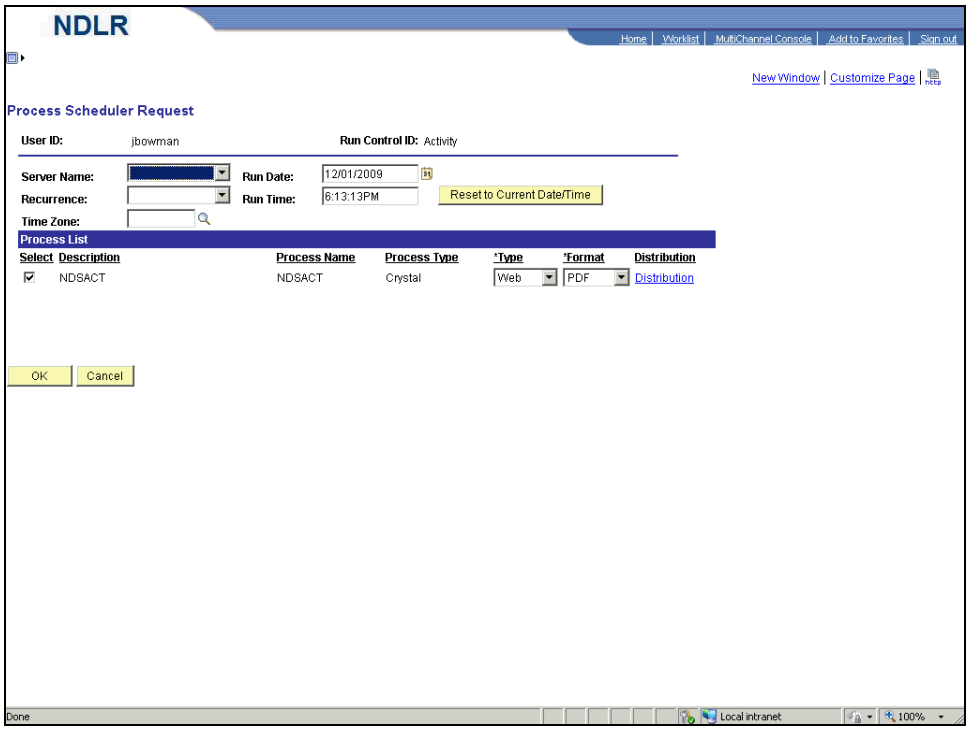
Step	Action
16.	Click the **Activity ID Look Up** button.



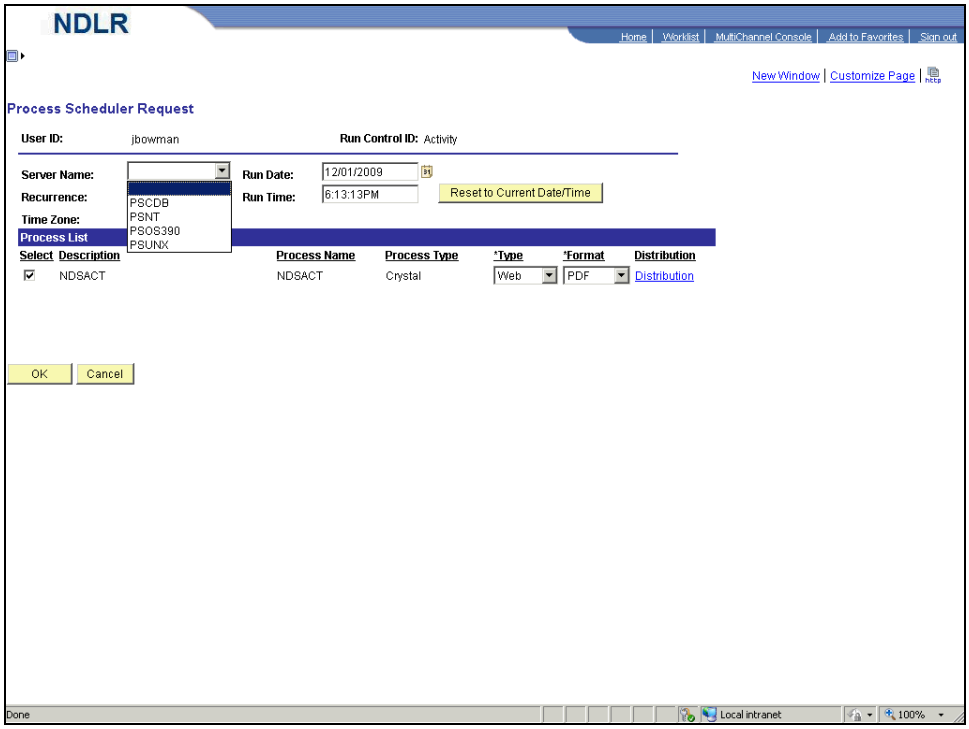
Step	Action
17.	Select the "**15**" list item. 15
18.	The parameters are now set for the **NDS Activity Sign in Report**.



Step	Action
19.	Click the **Run** button. Run
20.	Use the **Process Scheduler Request** page to enter or update parameters, such as **Server Name** and **Recurrence**.
21.	You must select a **Server Name** to identify the server in which the process will run. If you use the same **Run Control ID** for subsequent processes, the server name that you last used will default in this field.

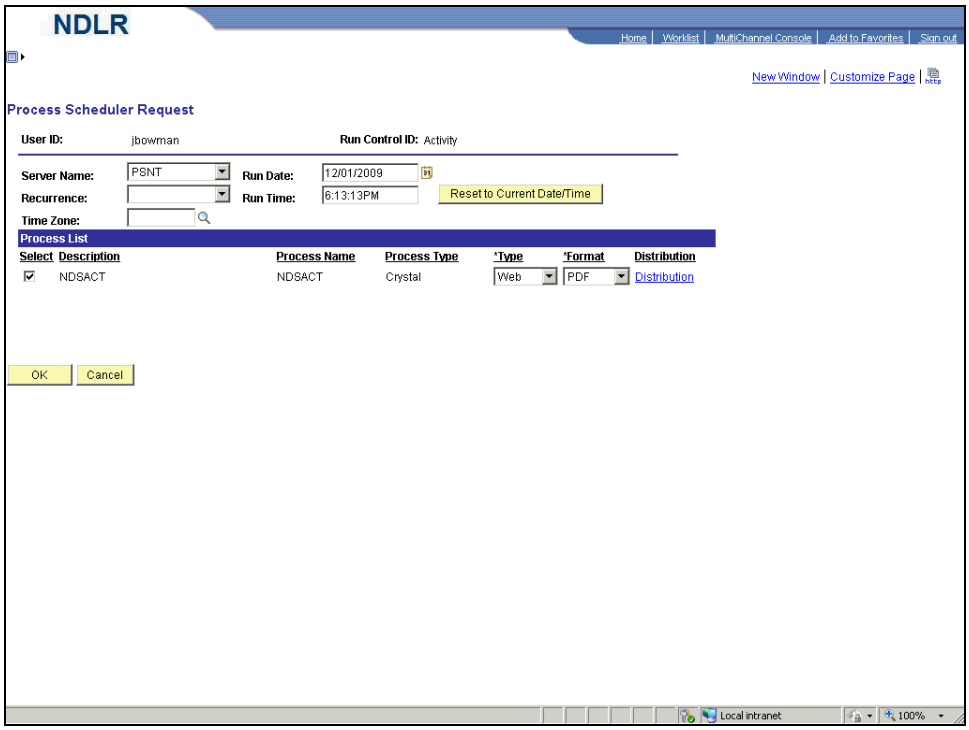


Step	Action
22.	Click the **Server Name** drop down list.



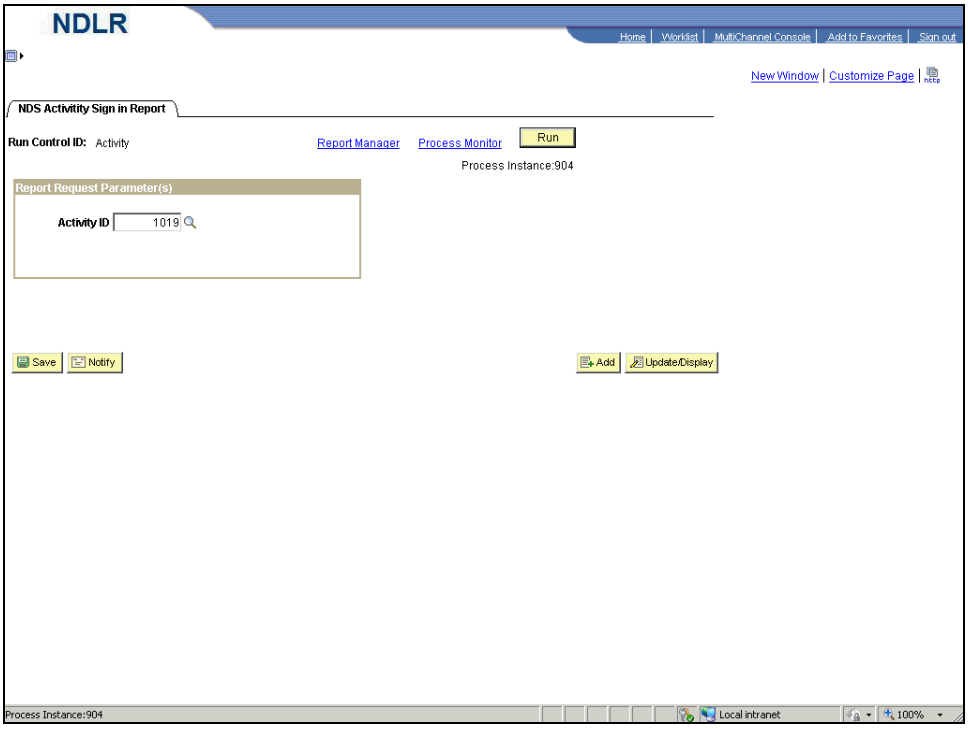
Step	Action
23.	Select the "**PSNT**" list item. PSNT
24.	The **Run Date** field is used to specify the date you want to run the specific process. This gives you the ability to set a report to run on a future date.
25.	The **Recurrence** field is used to specify the recurring time intervals for a process request to run. for instance, if you need to run a process every weekday at 5pm, that resolves all the transactions managed by your website, you can select the run recurrence definition of M-F at 5pm to schedule this process to run at the appropriate time.
26.	The **Run Time** field is used to specify the time you want to run the specific process. This gives you the ability to set a report to run at a future time.
27.	The **Reset to Current Date/Time** button is used to set the Run Date and Run Time back to the current date and time.
28.	The **Time Zone** field is used to specify the time zone in which you want the process to run.
29.	The **Description** field helps to uniquely identify a process. You should be familiar with the processes that you currently run as part of your daily tasks to identify them by this description.
30.	The **Process Name** field displays the name of the process as it appears in the definition.
31.	The **Process Type** field displays the type of process that is being run to produce the report.
32.	Use the **Type** drop down field to select the type of output you want to generate for the report. The four choices for this field are: **File** - This enables you to write the output to a file that will appear in the Output Destination. **Printer** - You can enter a custom printer location if you have the appropriate security access. **Email** - You can enter the destination information to send to an email recipient(s). Note that Email is available only for SQR, PS/n Vision and Crystal. **Web** - Sends all output of the process to the report repository, including log and trace files.

Step	Action
33.	Use the **Format** field to define the output format for the report. the values are dependent upon the Process Type you have chosen. The seven choices for this field are: **PDF** - A file format that is non editable. **DOC** - A file extension for word processing documents. (i.e., Microsoft Word document) **HTM** - A web based document. **RPT** - A file type primarily associated with a report and is used by many programs. **RTF** - A document file format for cross-platform document interchange. **TXT** - A computer file that is structured as a sequence of lines. A text file exists within a computer file system. **XLS -** A spreadsheet application that features calculation, graphing tools, pivot tables and a macro programming language. (i.e., MicroSoft Excel)



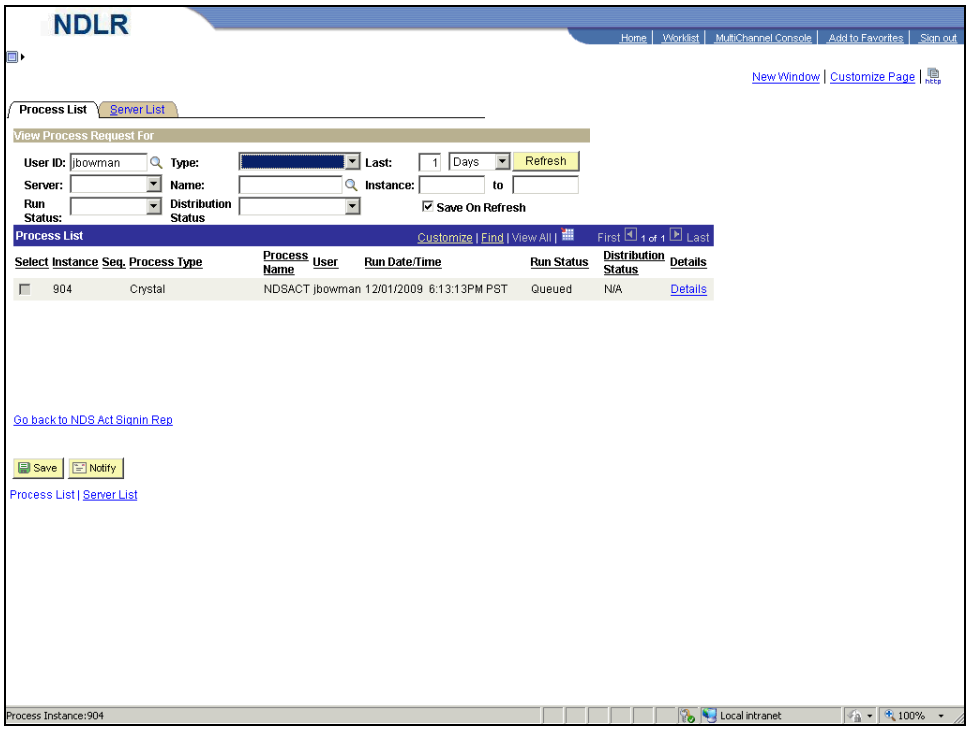
Step	Action
34.	Click the **OK** button. OK

Step	Action
35.	The report is now running. Notice the report has been assigned a **Process Instance** number, 904. **Note**: It is recommended that you make note of this number for future tracking.
36.	Now that the report has been set to run, you will use **Process Monitor** to track the status of the report. Use **Process Monitor** to: - Check the status of your submitted requests. - Cancel process requests that have been initiated or are currently processing. - Hold process requests.



Step	Action
37.	Click the **Process Monitor** link. Process Monitor
38.	Process Monitor supplies you with two pages, the **Process List** page and the **Server List** page. Use the **Process List** page to view the status of submitted report/process requests.
39.	Use the fields in the **View Process Request For** section to display specific process based on the criteria entered in these fields.

Step	Action
40.	Use the **User ID** field to view the processes submitted by a specific User. It is most common that you view your own User ID.
41.	Use the **Type** field to view by a process type, such as Application Engine, Crystal, COBOL or SQR processes.
42.	Use the **Last** fields to specify an interval of time by which to limit the process requests that appear in the list. this field allows for you to enter a custom numerical value in the field and then select a unit type: **Days**, **Hours** or **Minutes**.
43.	Use the **Server** field to view processes that are run on a particular server.
44.	Use the **Name** field to view all processes for a specific process name.
45.	Use the **Instance** fields to display results based on the process instance number. This number is automatically generated when a process is requested.
46.	Use the **Run Status** field to view processes by status, such as Completed or Error.
47.	Use the **Distribution Status** field to view processes by distribution status, such as Generated, Posted or Not Posted.
48.	The **Process List** section itemizes all the requested processes for the user.
49.	You can obtain details about a particular process request by clicking the **Details** link in the **Details** column. This launches the **Process Detail** page where you can view such details as request parameters and message logs.

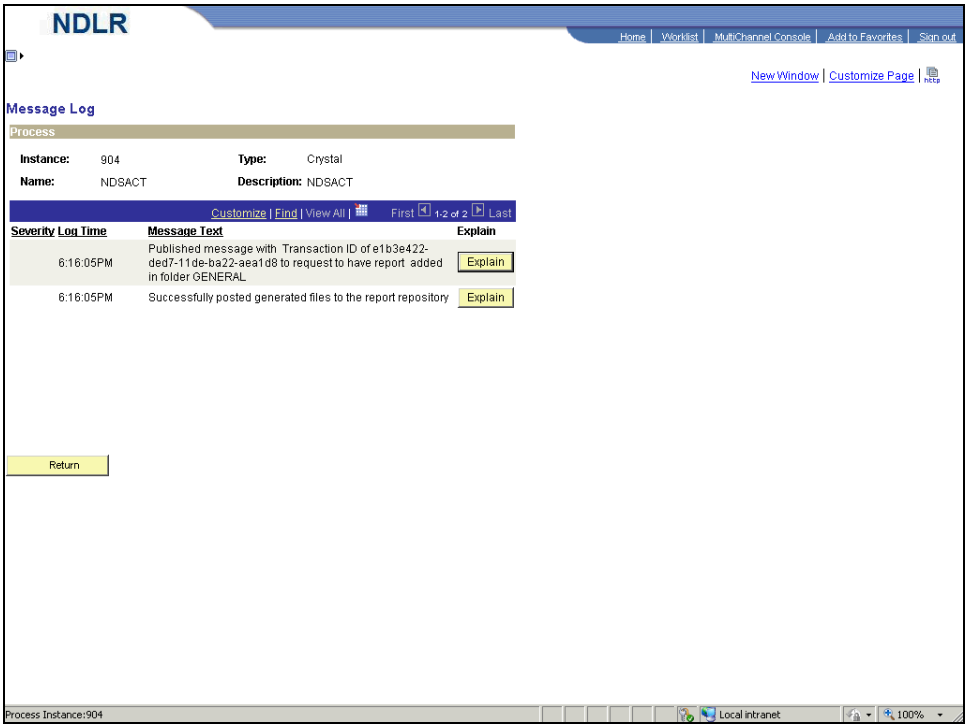


Step	Action
50.	Click the **Details** link. Details
51.	Most of the items on the **Process Detail** page are display only; however you can use some controls to manipulate the program run, as needed.
52.	The **Process** group box contains general information to help you identify the process request. This is a display only group, showing basic descriptive information about the process.
53.	The **Run** group box shows specific run information, such as the Run Control ID and the run location. If the process runs on the server, the server name appears in the **Server** field. Any run recurrence that you have selected will appear in the **Recurrence** field.
54.	The **Update Process** group box displays the actions you can use. Available actions are dependent upon your user authorizations and the current status of the request. If you are authorized, you have the following available options to select: Hold, Queue, Cancel, Delete or Restart.
55.	The **Actions** group box contains links to other pages that provide additional details about the process parameters.
56.	Use the **Parameters** link to view additional information about the process parameters, such as run time definition variables, the path and program used to run the process, the location of the completed output and additional information about the process status.

Step	Action
57.	Click the **Parameters** link. Parameters

Step	Action
58.	Click the **Return** button. Return
59.	Use the **Message Log** link to view messages that are inserted into the message log by the program that is running.

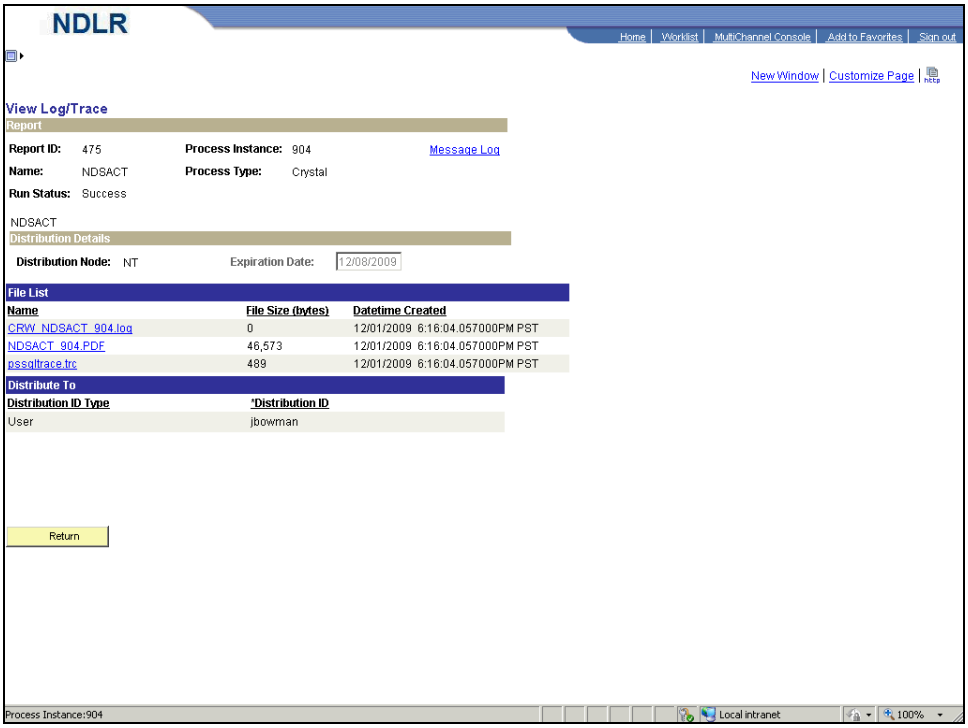
Step	Action
60.	Click the **Message Log** link. Message Log



Step	Action
61.	Click the **Return** button. Return
62.	The **Batch Timings** link is only available for process requests with a process type of Application Engine. The **Batch Timings** report contains a set of statistics that system administrators can use to tune the system to gain better performance. This report relates specifically to PeopleSoft Application Engine program performance.

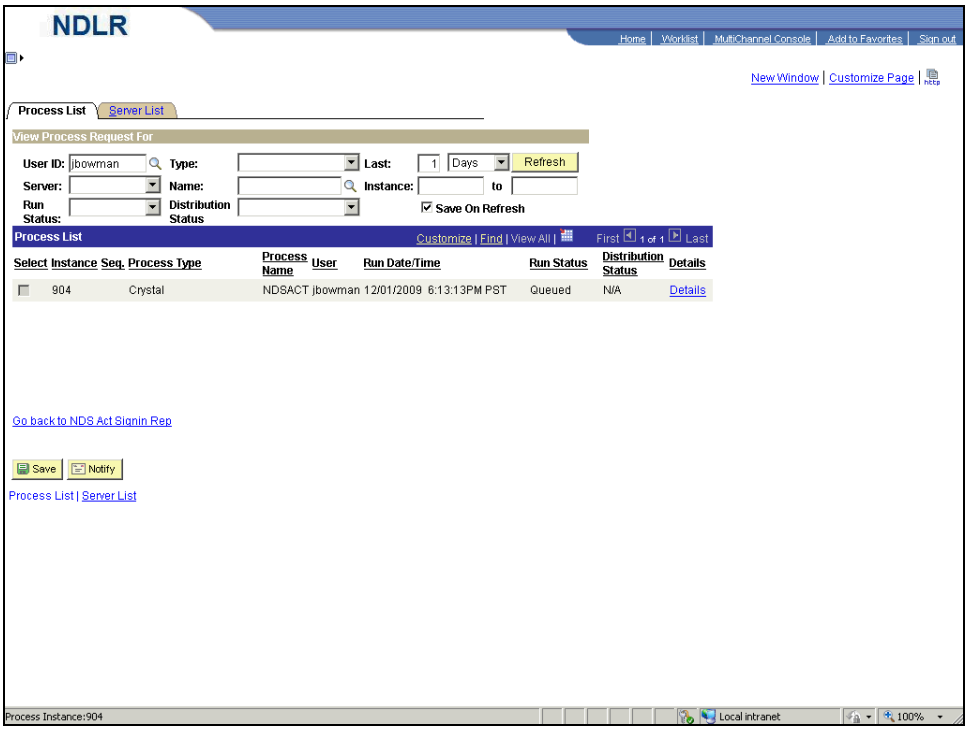
Step	Action
63.	Click the **View Log/Trace** link. View Log/Trace
64.	When you click the **ViewLog/Trace** link, a new browser window will open, displaying links that enable you to view the message log and trace file in a browser.

Step	Action
65.	The View Log/Trace link appears on the **Process Monitor Detail** page when at least one of the following conditions are met: - The output destination for the process request is Web and the report and log files were successfully posted to the Report Repository by the Distribution Agent. - The process has a run status of Success and a distribution status of Posted. - The process request ran from a PeopleSoft Process Scheduler Server Agent that was set up using the Server Definition page with a distribution node.



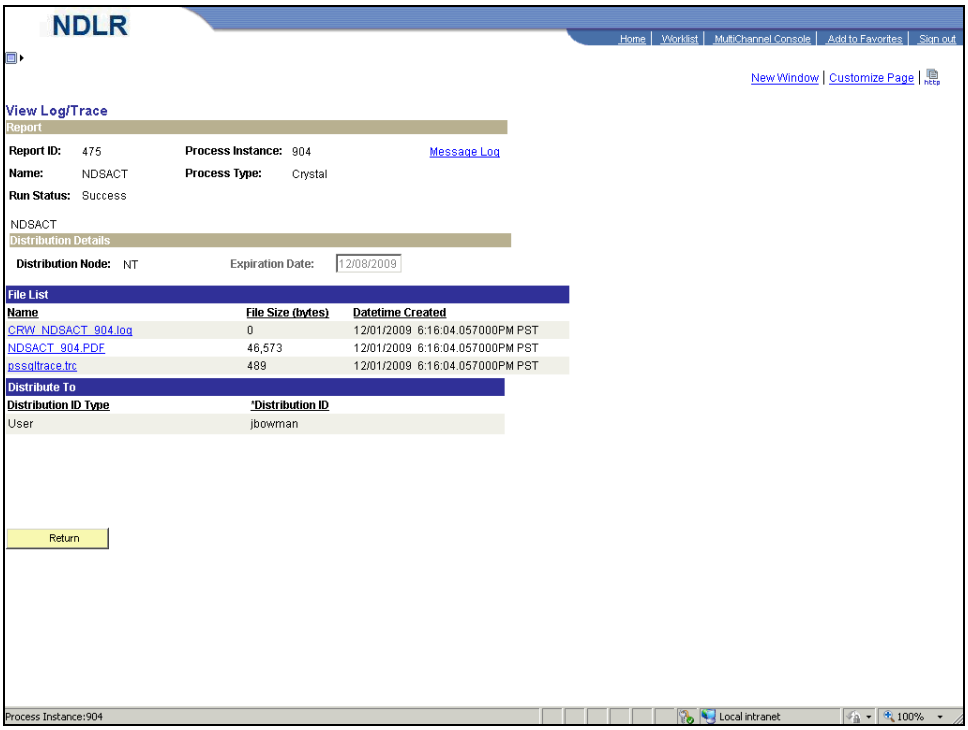
Step	Action
66.	Click the **Return** button. Return

Step	Action
67.	Click the **OK** button. OK
68.	The current status of the report is **Queued**. The report is finished running when it has a status of **Success**. How detailed the report is will dictate how long it takes to obtain a status of Success. This report is not long, so clicking the **Refresh** button once should update the Run Status. **Note**: For reports that take longer to run, it is a good idea to continue other work while the report is being run in the background.
69.	Knowing the run status of your job helps you to know exactly where it is in the queue. It also helps to identify a problem if the process has an error.

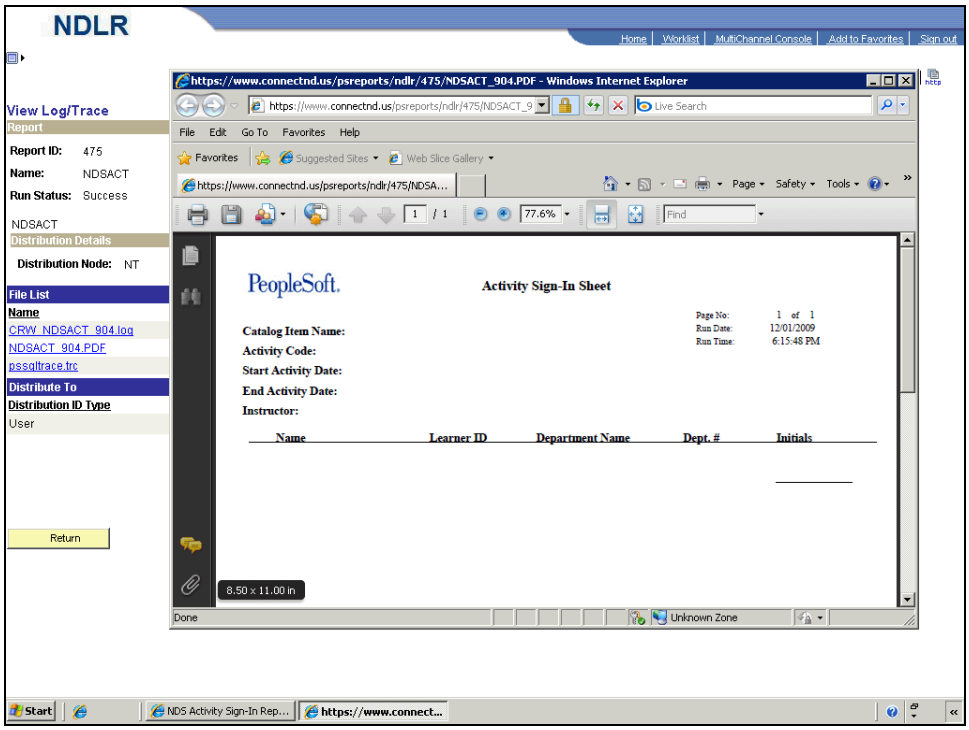


Step	Action
70.	Click the **Refresh** button. Refresh
71.	The status of the report is now **Success**, meaning that the report has finished running. Now that the report is finished running, you can now view the report.
72.	Click the **Details** link. Details

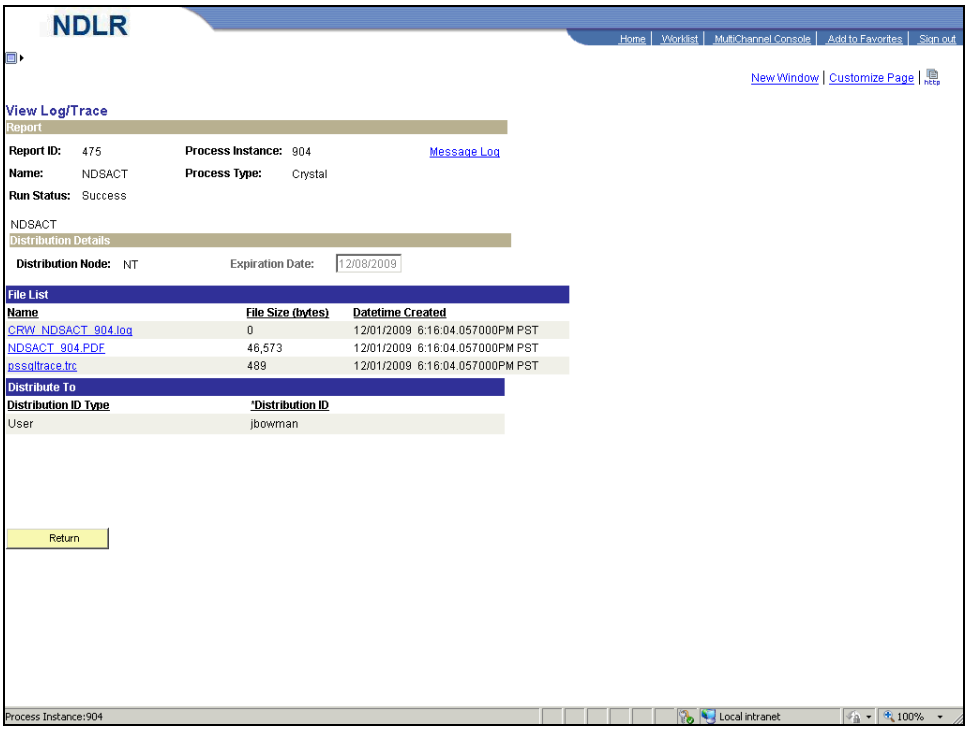
Step	Action
73.	Click the **View Log/Trace** link. View Log/Trace
74.	The link for the report contains the process name followed by the process instance number.



Step	Action
75.	Click the **NDSACT_904.PDF** link. NDSACT_904.PDF
76.	A second browser window launches that displays the report. Review the **Activity Sign-In Sheet** report. To print this report, click the browser's print button.



Step	Action
77.	Click the **Maximize/Restore** button.
78.	Click the **Close** button.



Step	Action
79.	Click the **Return** button. Return

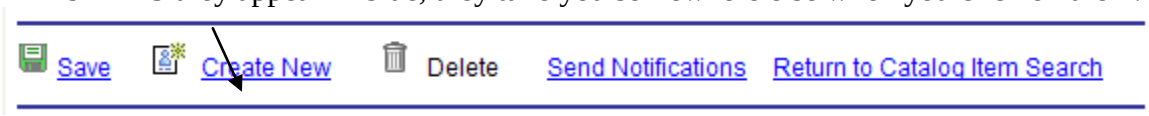
Step	Action
80.	Click the **OK** button. OK
81.	If you are authorized to delete a report, the **Select** checkbox will be active. This enables you to select the report and then click the delete button to remove the report from the list. **Note**: You must be assigned the appropriate security rights to delete reports from the **Process List**.
82.	**Congratulations**! You should now be able to: - Navigate to the **NDS Act Signin Rep** page. - Run the Activity Signin Sheet. **End of Procedure.**

Appendix

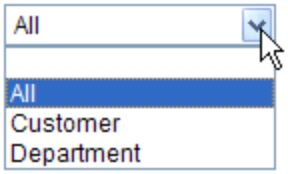
Definitions:

Button – pressing this causes an action such as save, delete, drop, add etc.

Links- in PS they appear in blue, they take you somewhere else when you click on them.

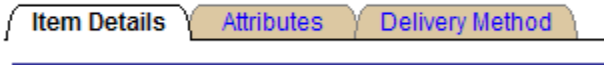


List- by clicking this it produces a drop down list of items.



Lookup- a looking glass icon: by selecting this you will get a list of search results

Tabs- pages associated with a task



ELM Terms

- **Activity:** An activity is associated with an **Item**. Activities may be referred to as classes, the actual dates that the class takes place.

- **Item:** Each catalog item represents a specific topic of study for which you offer learning activities. An item may be referred to as a course.

- **Learner Group:** Learner groups are defined groups of learners that share some of the same learner attributes, such as the same department, region, or job code. One of the primary functions of learner groups is to control access to the learning catalog. Learner groups can have both internal and external learners in it.

- **Learning Environment:** Learning environments provide a way to create separate domains within the learning catalog. Each domain is a different agency in our case.

- **Program:** A program represents a significant learning goal that can be achieved by completing multiple learning activities. There are 2 types of programs that can be created within ELM. They are curricula and certification programs.
    - A curriculum program guides the learner along a specific learning path over an unrestricted span of time.
    - A certification program enforces a fixed time period within which the learner must complete all items to become certified in a particular area.

- **Session:** When you are building classroom instructor led dates and times, each day of class is a session.

- **Team Members:** Learner(s) that 'Report To' a Manager

ELM Roles

ELM User - Learner role for Internal, External and Instructors. Anyone who has access to the ELM system.

Enrollment Administrator - Administrator who has ownership over enrollment process for Internal Learners.

External Learner - Any Learner who is not part of the PEOPLESOFT HR system of record. No access to self service.

External Learning Administrator - Administrator who has ownership over enrollment process for External Learners.

External User: Individuals who do not have a record in the HR system. But will have access to ELM self service functions.

Instructor - Any Instructor who belong to either the internal or an external organization.

Instructor Manager - At a manager level, any Instructor who belong to either the internal or an external organization.

Internal Learner - Any Learner who is part of the PEOPLESOFT HR system of record.

Learning Administrator - May also be called a Training Administrator. Enters external learners and general admin duties.

Learning Catalog Administrator - Creates learning catalog and associated entries and has overall ownership.

Learning Environment Administrator - Creates and maintains Learning Environments.

Learning Finance Administrator - Establishes chart fields in conjunction with Activities.

Learning Resource Administrator - Creates and maintains resources associated with rooms and equipment.

Manager - Any management role that has a subordinate or team. Comes from PEOPLESOFT HR.

Profile Administrator - Create and maintain user profiles for Internal, External and Instructors.

Roster Administrator - Maintenance of Rosters, Grades and Attendance. Used primarily by Instructors.

Technical Administrator - Maintains Integration Broker Nodes, Process Scheduler, Overall system performance.

Help Desk Procedure

- When an issue arises, check with your agency lead or agency ELM administrator for assistance.
    - If they are unable to provide guidance call the ITD helpdesk (701-328-4470) and log a ticket.
    - If you need to add access in ELM for someone in your agency, use the form on OMB's website "ELM Security Request".