

Job Aid: Assign Learning via Basic Methods

Course: Learning Needs Management
Lab 12: Assign Items Directly to User Record
Lab 13: Assign a Curriculum Directly to User Record
Lab 14: Assign a Curriculum using the User Needs Management Assistant

Prerequisite Courses

- Introduction to LearningLink Learning Administration
- Learning Needs Management

Description

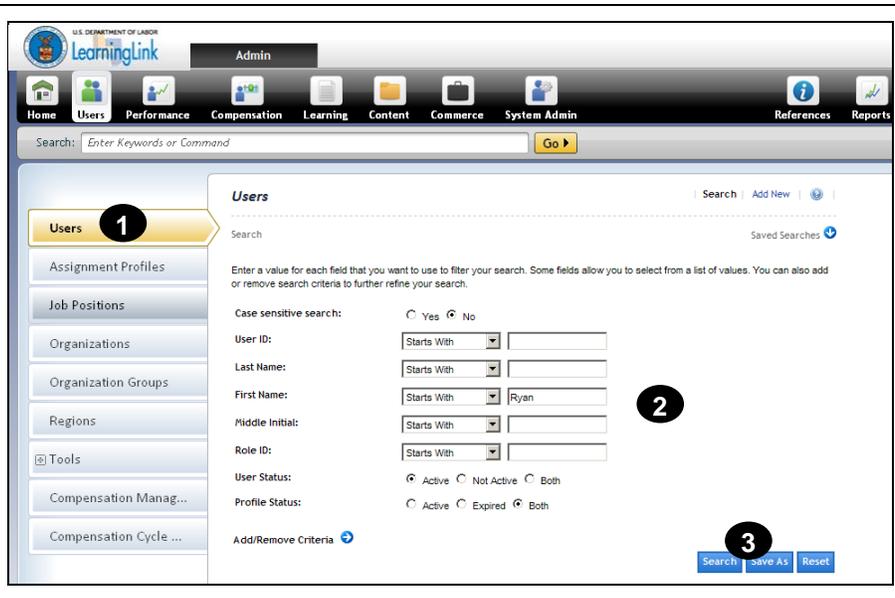
The purpose of this job aid is to guide administrators through the step-by-step process of assigning items and curricula to users.

Tasks

- A. Assign Items Directly to User Record
- B. Assign Curriculum Directly to User Record
- C. Assign Items to Users Using User Needs Management Tool
- D. Assign Curricula to Users Using User Needs Management Tool
- E. Assign a Curriculum to Users by Associating it with a Job Position

Task A. Assign Items Directly to User Record

- 1 Verify the Admin tab is selected.
- 2 Navigate to Users > Users.
- 3 Enter criteria to find the user record.
- 3 Select Search.



4 In the search results list, select the edit icon () to select the user record.

Field Chooser [Download Search Results](#) [Send Notification](#)
Select All / Deselect All

Records per Page **25** (23 total records)

User ID	User Name	Notify
RYWBAYNE	  Bayne, Ryan W	<input type="checkbox"/>
RYMBODENSTEIN	  Bodenstein, Ryan M	<input type="checkbox"/>
RYJBUTTS	  Butts, Ryan J	<input type="checkbox"/>
RYDCAPIZZI	  Capizzi, Ryan D	<input type="checkbox"/>
RYCDAVIS	  Davis, Ryan C	<input type="checkbox"/>
RYKDEMARCHIS	  Demarchis, Ryan K	<input type="checkbox"/>

5 Select the Learning Plan tab.

Users | Search | Add New |  | 

> Search > Search Results > Edit Learning Plan

User ID: RYCDAVIS
Name: Davis, Ryan C

Learning Plan **5** | Edit the User

Assign User Needs

Enter Items or add one or more from list [Assign Learning Needs...](#)

Type: Item ID: Assign Date (MMM/d/yyyy): [Add](#)

6 To add items, select the item type from the drop-down menu.

7 Enter the exact item ID.

8 Today's date defaults as the assign date, or enter another date (not in the future).

9 Select Add.

or

10 Select the add one or more from list link to search for items.

Users | Search | Add New |  | 

> Search > Search Results > Edit Learning Plan

User ID: RYCDAVIS
Name: Davis, Ryan C

Learning Plan | Edit the User

Assign User Needs

Enter Items or add one or more from list [Assign Learning Needs...](#)

Type: **6** Item ID: **7** Assign Date (MMM/d/yyyy): **8** [Add](#) **9**

Note: Clicking Assign Learning Needs... starts the User Needs Management tool.

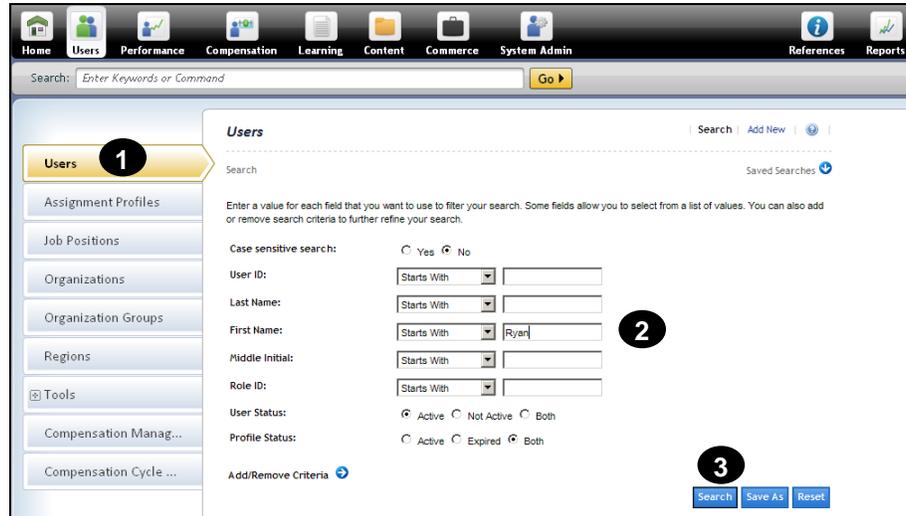
For this example, we added the *EHS Emergency Planning* item.

From the Learning Plan tab, view the user's learning plan to verify the item was added.

COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Planning	Sheryl Golub	ate: <input type="text" value="Nov/27/2010"/>	Assign. Type: REQ (Required)
			Days Rem: 30	Compl Date:
			Curriculum ID:	Failure Date:
				Origin: Directly Assigned
				Assigned: Oct/28/2010

Task B. Assign Curriculum Directly to User Record

- 1 Navigate to Users > Users.
- 2 Enter criteria to find the user record.
- 3 Select **Search**.

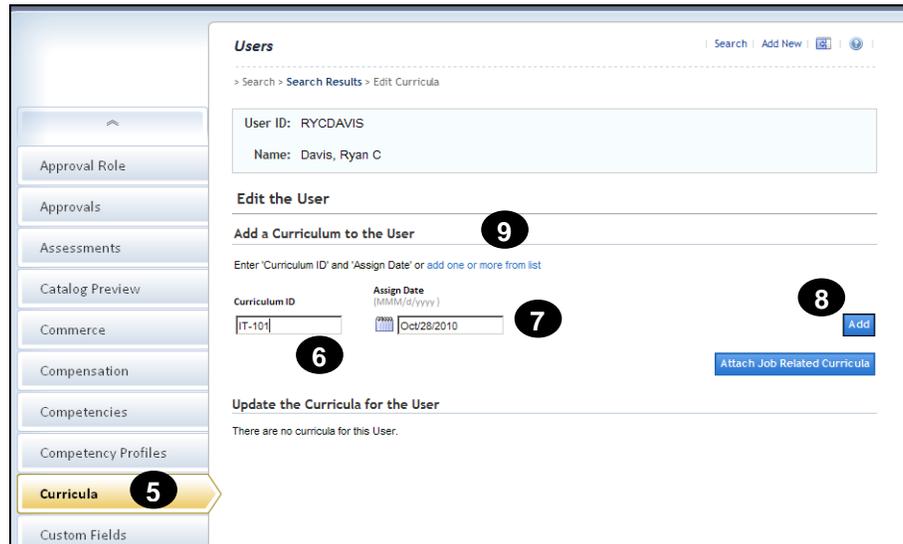


- 4 In the search results list, select the edit icon () to select the user record.

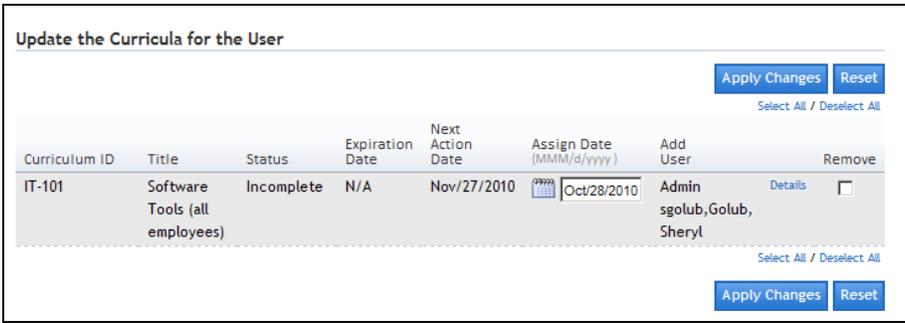
Records per Page: 25 (23 total records)

User ID	User Name	Notify
RYWBAYNE	  Bayne, Ryan W	<input type="checkbox"/>
RYMBODENSTEIN	  Bodenstein, Ryan M	<input type="checkbox"/>
RYJBUTTS	  Butts, Ryan J	<input type="checkbox"/>
RYDCAPIZZI	  Capizzi, Ryan D	<input type="checkbox"/>
RYCDAVIS	  Davis, Ryan C	<input type="checkbox"/>
RYKDEMARCHIS	  Demarchis, Ryan K	<input type="checkbox"/>

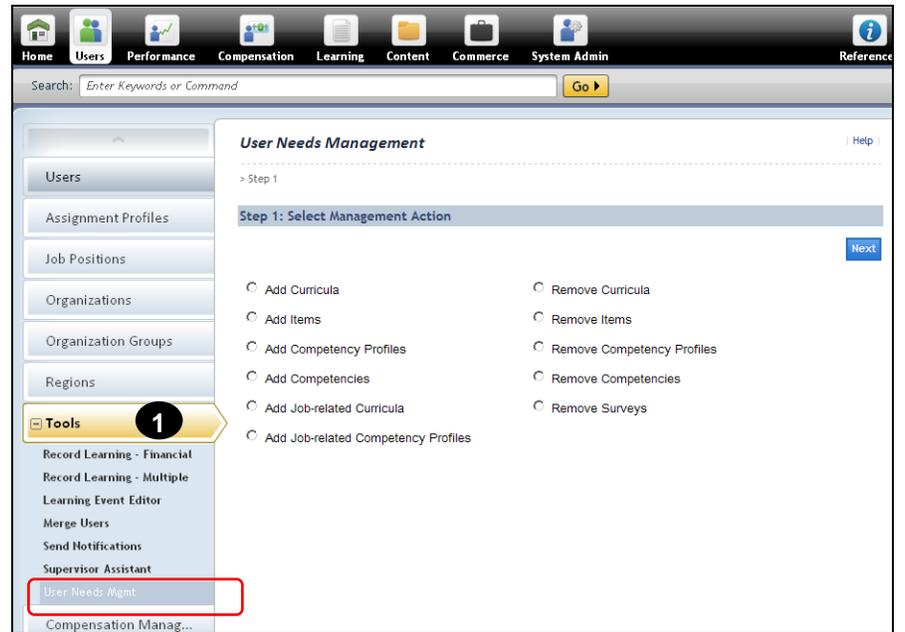
- 5 Select the Curricula tab.
- 6 To add a curriculum, enter the exact curriculum ID.
- 7 Today's date defaults as the assign date, or enter another date (not in the future).
- 8 Select **Add**.
- or
- 9 Select the **add one or more from list** link to search for curricula.

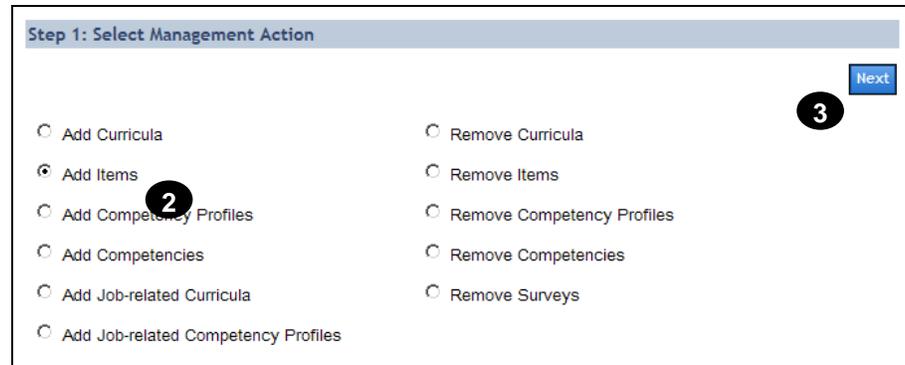


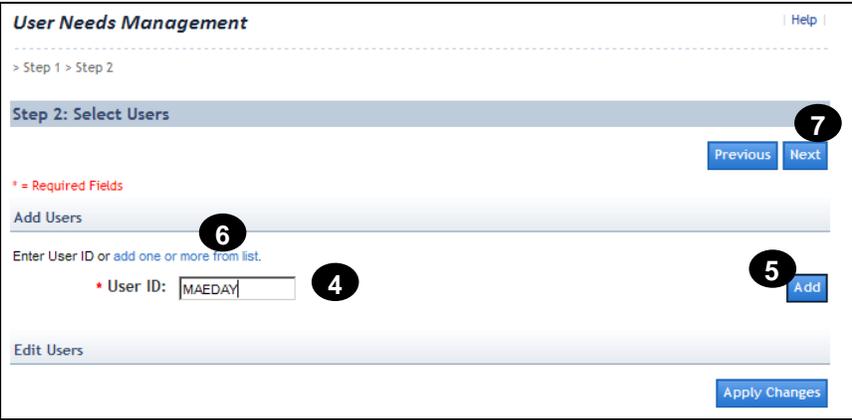
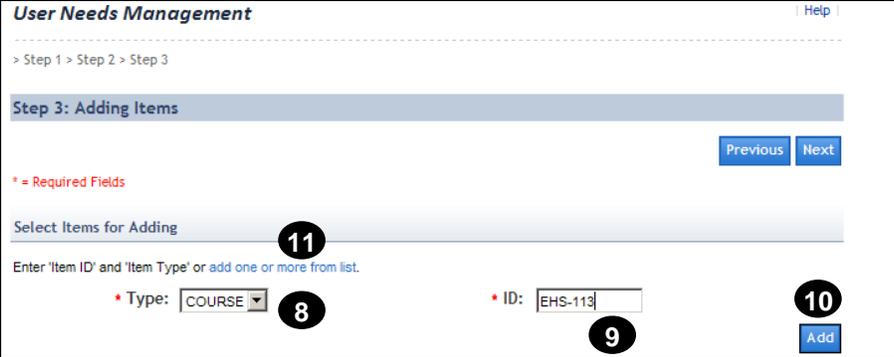
Note: Clicking *Attach Job Related Curricula* automatically assigns any curriculum associated with the user's current job position.

<p>For this example, we added the <i>Software Tools</i> curriculum.</p> <p>From the Curricula tab, view the assignments to verify the curriculum was added.</p>	
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Task C. Assign Items to Users Using User Needs Management Tool

<p>1 Navigate to Users > Tools > User Needs Mgmt.</p>	
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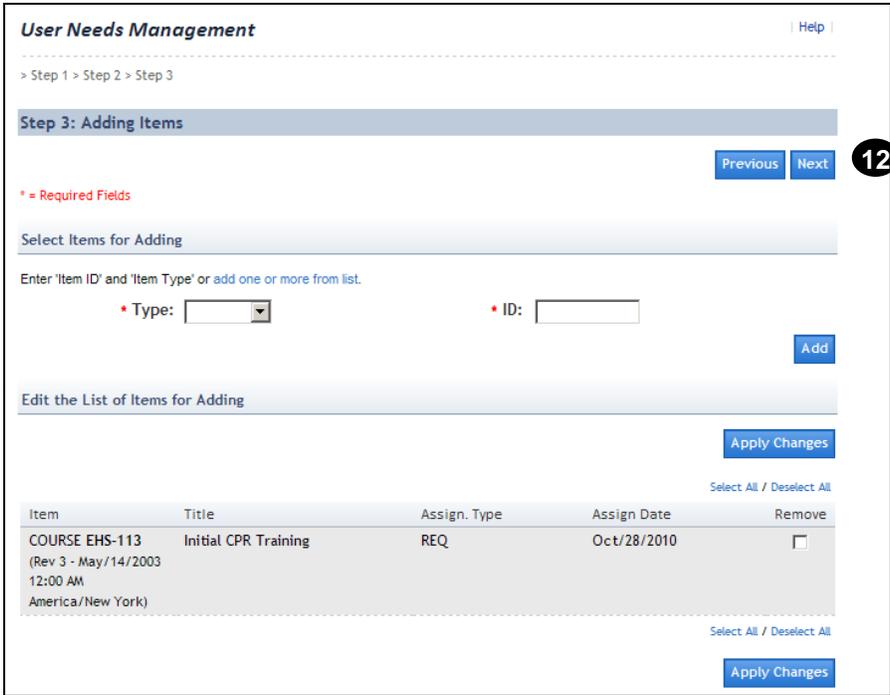
<p>2 <i>Step 1: Select Management Action of the User Needs Management wizard displays.</i></p> <p>2 Select the action you wish to take. For this example, let's add items to users' learning plans.</p> <p>3 Select Next.</p>	
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<p>4 Step 2: Select Users of the User Needs Management wizard displays.</p> <p>5 To add a user, enter the exact user ID in the User ID textbox.</p> <p>5 Select Add.</p> <p>or</p> <p>6 Select the add one or more from list link to search for and select users.</p> <p>7 Select Next.</p>	 <p>The screenshot shows the 'User Needs Management' interface at Step 2: Select Users. It includes a breadcrumb trail '> Step 1 > Step 2', a 'Help' link, and 'Previous' and 'Next' buttons. A red asterisk indicates required fields. The 'Add Users' section has a search bar with the text 'Enter User ID or add one or more from list.' Below it, the 'User ID' field contains 'MAEDAY' and is marked with a circled 4. An 'Add' button is marked with a circled 5. The 'Edit Users' section has an 'Apply Changes' button marked with a circled 7.</p>
<p>8 Step 3: Adding Items of the User Needs Management wizard displays.</p> <p>To add items:</p> <p>8 Select the item type from the drop-down menu.</p> <p>9 Enter the exact item ID.</p> <p>10 Select Add.</p> <p>or</p> <p>11 Select the add one or more from list link to search for and select items.</p>	 <p>The screenshot shows the 'User Needs Management' interface at Step 3: Adding Items. It includes a breadcrumb trail '> Step 1 > Step 2 > Step 3', a 'Help' link, and 'Previous' and 'Next' buttons. A red asterisk indicates required fields. The 'Select Items for Adding' section has a search bar with the text 'Enter 'Item ID' and 'Item Type' or add one or more from list.' Below it, the 'Type' dropdown menu is set to 'COURSE' and is marked with a circled 8. The 'ID' field contains 'EHS-113' and is marked with a circled 9. An 'Add' button is marked with a circled 10. A circled 11 points to the search bar area.</p>

For this example, we added the course, *Initial CPR Training*. One or more items can be added.

Now that we have an item, we can continue with the tool.

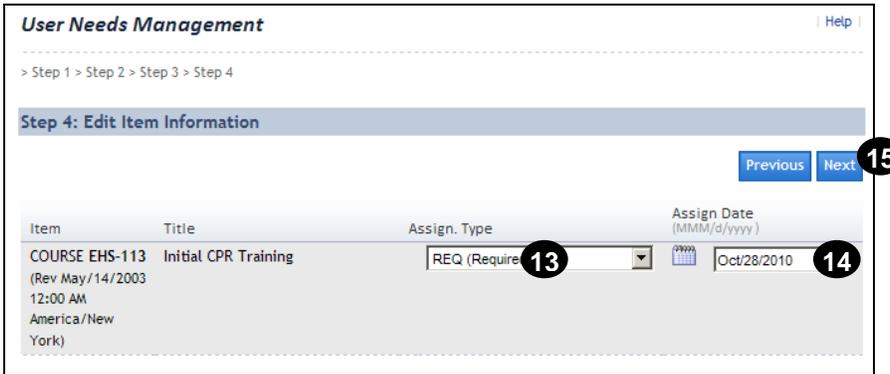
12 Select Next.

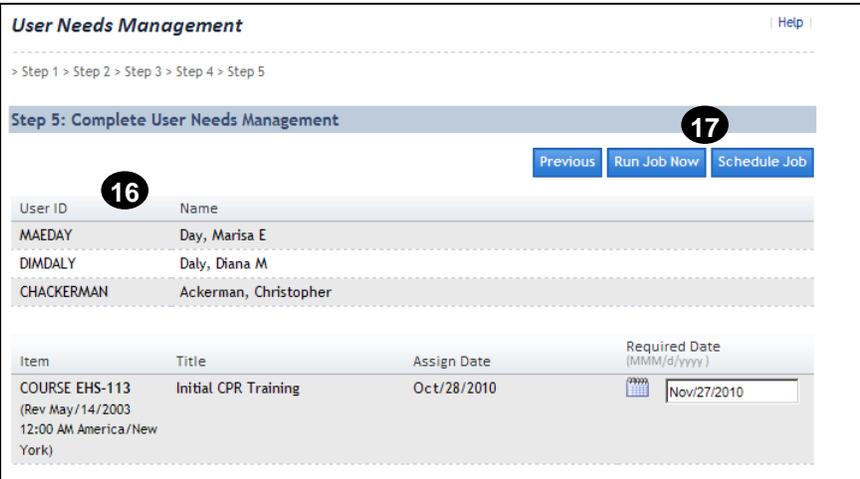
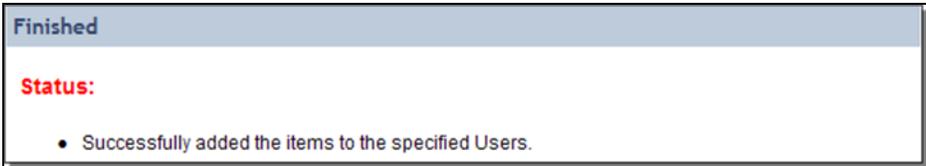


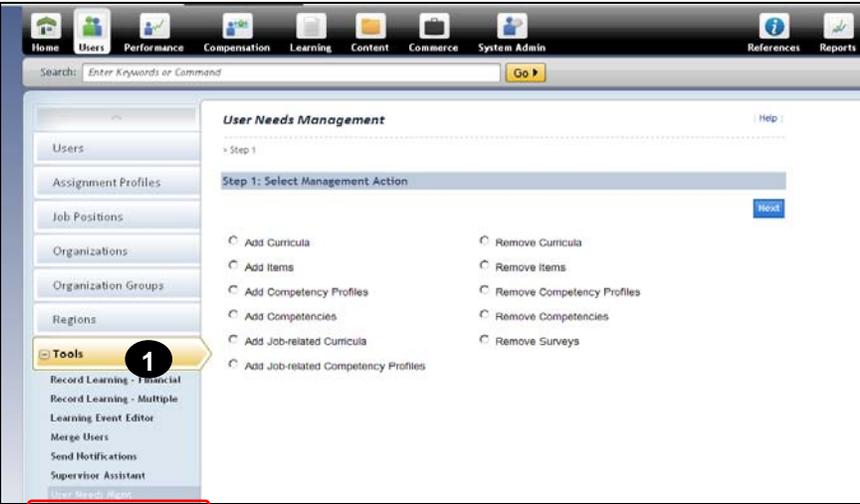
13 Select the assignment type from the drop-down menu.

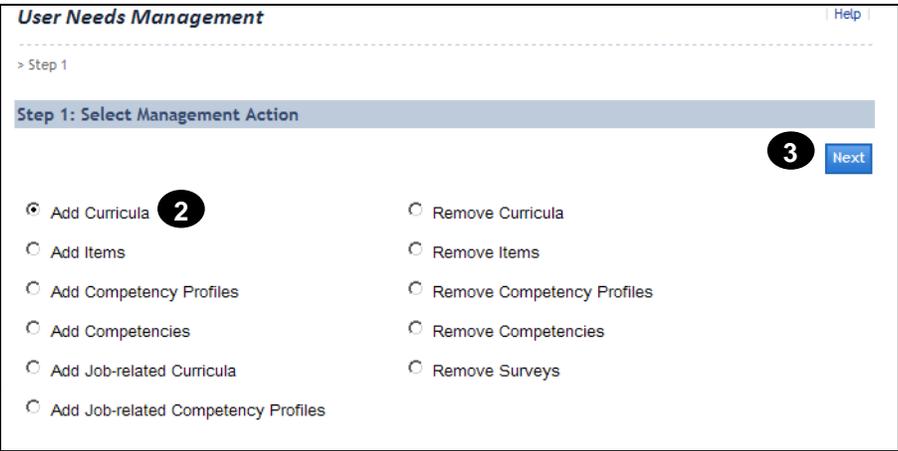
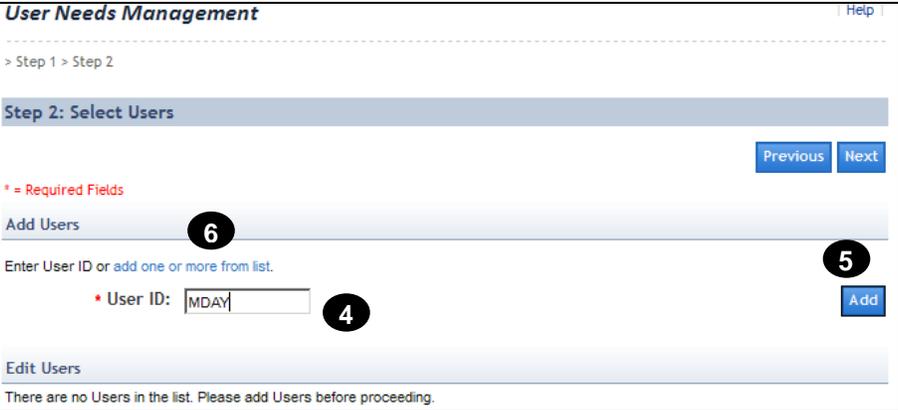
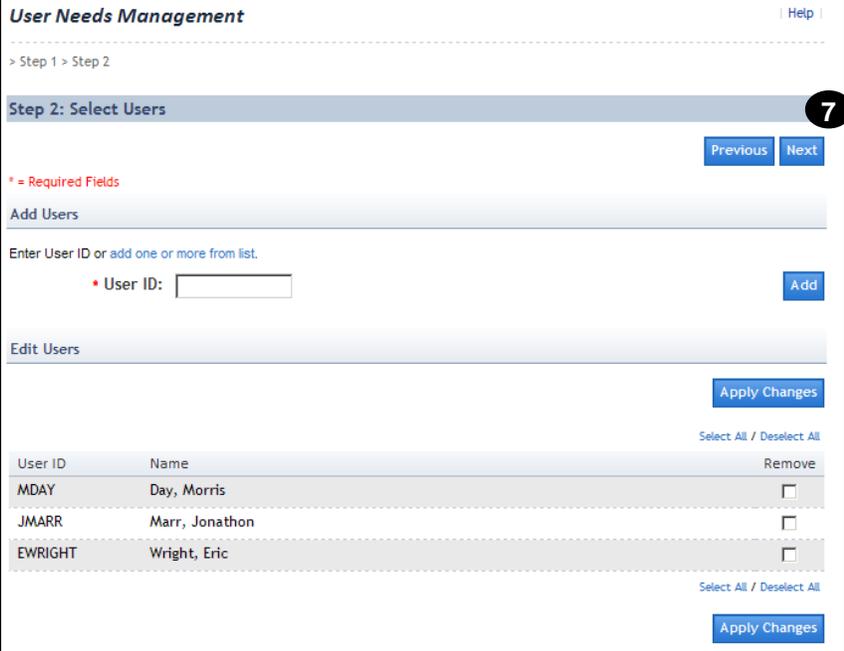
14 Today's date defaults as the assign date. You can also manually enter another date (not in the future).

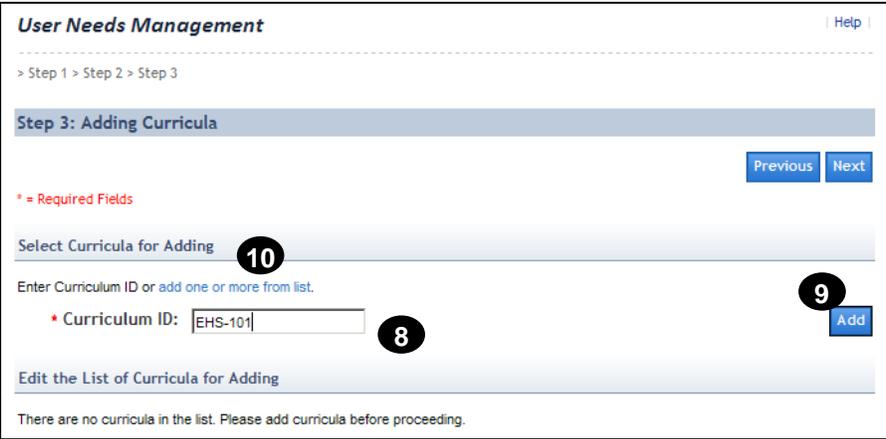
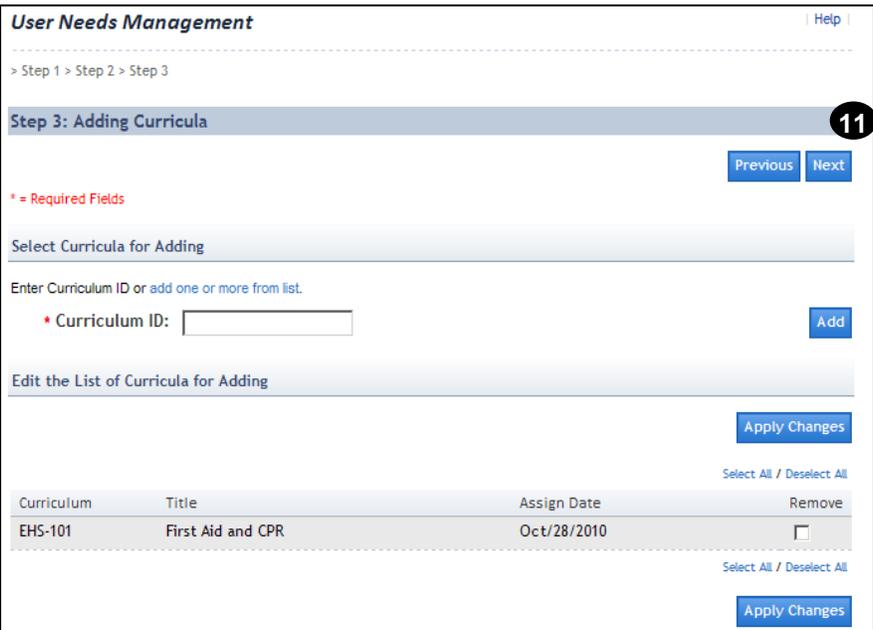
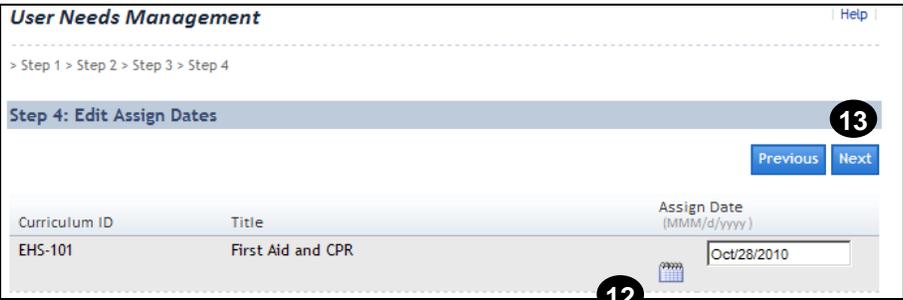
15 Select Next.

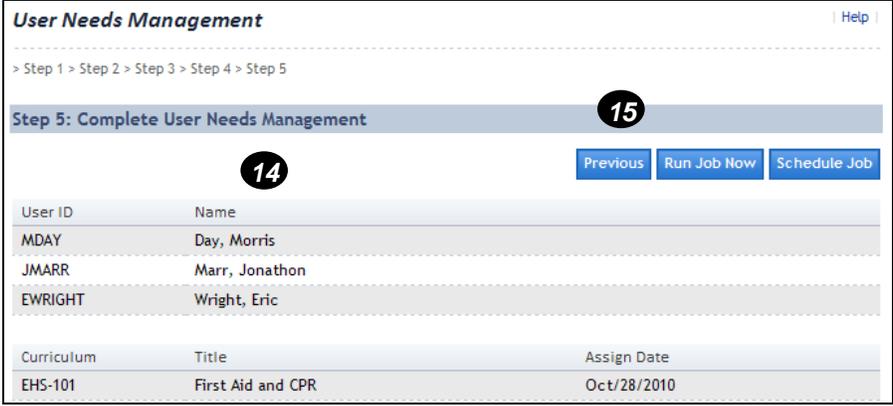


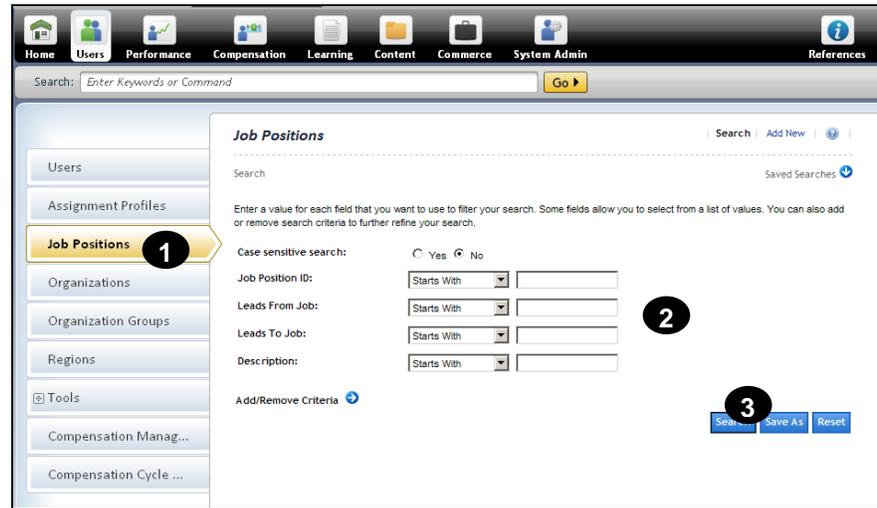
<p>16 Step 5: Complete User Needs Management of the User Needs Management wizard displays.</p> <p>Review the list of affected users. Verify the item to be assigned. Adjust the required date if necessary.</p> <p><i>Note: The required date is calculated based on the item settings.</i></p> <p>17 Select Run Job Now or Schedule Job to complete the User Needs Management wizard.</p>	 <p>The screenshot shows the 'User Needs Management' interface at Step 5. It includes a breadcrumb trail: > Step 1 > Step 2 > Step 3 > Step 4 > Step 5. A blue header bar reads 'Step 5: Complete User Needs Management' with a '17' in a circle. Below are buttons for 'Previous', 'Run Job Now', and 'Schedule Job'. A table lists users: MAEDAY (Day, Marisa E), DIMDALY (Daly, Diana M), and CHACKERMAN (Ackerman, Christopher). A second table lists items: COURSE EHS-113 (Initial CPR Training) with an assign date of Oct/28/2010 and a required date of Nov/27/2010.</p>
<p>If you select Run Job Now, a Status page displays. The assignment was completed successfully.</p>	 <p>The screenshot shows a 'Finished' status page with a red 'Status:' heading and a message: 'Successfully added the items to the specified Users.'</p>

<p>Task D. Assign Curricula to Users Using User Needs Management Tool</p>	
<p>1 Navigate to Users > Tools > User Needs Mgmt.</p>	 <p>The screenshot shows the system navigation menu with 'Tools' highlighted and a '1' in a circle. The 'User Needs Management' tool is selected, showing 'Step 1: Select Management Action' with options like 'Add Curricula', 'Add Items', 'Add Competency Profiles', 'Add Competencies', 'Add Job-related Curricula', and 'Add Job-related Competency Profiles'. A red box highlights the 'Tools' menu item.</p>

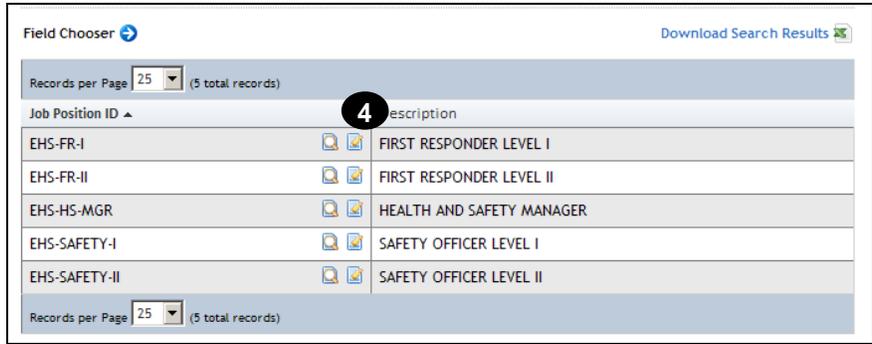
<p>2 <i>Step 1: Select Management Action of the User Needs Management wizard displays.</i></p> <p>2 Select the action you wish to take. For this example, let's add a curriculum to a group of users.</p> <p>3 Select Next.</p>	 <p>The screenshot shows the 'User Needs Management' interface at Step 1. The title is 'Step 1: Select Management Action'. There are two columns of radio button options: 'Add Curricula', 'Add Items', 'Add Competency Profiles', 'Add Competencies', 'Add Job-related Curricula', and 'Add Job-related Competency Profiles' on the left; and 'Remove Curricula', 'Remove Items', 'Remove Competency Profiles', 'Remove Competencies', and 'Remove Surveys' on the right. The 'Add Curricula' option is selected and circled with a '2'. A 'Next' button is circled with a '3'.</p>												
<p>4 <i>Step 2: Select Users of the User Needs Management wizard displays.</i></p> <p>4 Enter the exact user ID in the User ID textbox.</p> <p>5 Select Add.</p> <p>or</p> <p>6 Select the add one or more from list link to search for and select users.</p>	 <p>The screenshot shows the 'User Needs Management' interface at Step 2. The title is 'Step 2: Select Users'. There are 'Previous' and 'Next' buttons. Below the title, there is a section for 'Add Users' with a circled '6' and an 'Add' button with a circled '5'. A text input field for 'User ID' contains 'MDAY' and is circled with a '4'. Below the input field, there is an 'Edit Users' section with a message: 'There are no Users in the list. Please add Users before proceeding.'</p>												
<p>For this example, we searched and selected all users who reported to the same supervisor.</p> <p>Now that we have a list of users, we can continue with the tool.</p> <p>7 Select Next.</p>	 <p>The screenshot shows the 'User Needs Management' interface at Step 2, showing a list of users. The title is 'Step 2: Select Users'. There are 'Previous' and 'Next' buttons. Below the title, there is a section for 'Add Users' with an 'Add' button. Below that, there is an 'Edit Users' section with an 'Apply Changes' button. A table lists users with checkboxes for selection:</p> <table border="1"> <thead> <tr> <th>User ID</th> <th>Name</th> <th>Remove</th> </tr> </thead> <tbody> <tr> <td>MDAY</td> <td>Day, Morris</td> <td><input type="checkbox"/></td> </tr> <tr> <td>JMARR</td> <td>Marr, Jonathon</td> <td><input type="checkbox"/></td> </tr> <tr> <td>EWRIGHT</td> <td>Wright, Eric</td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <p>The 'Next' button is circled with a '7'.</p>	User ID	Name	Remove	MDAY	Day, Morris	<input type="checkbox"/>	JMARR	Marr, Jonathon	<input type="checkbox"/>	EWRIGHT	Wright, Eric	<input type="checkbox"/>
User ID	Name	Remove											
MDAY	Day, Morris	<input type="checkbox"/>											
JMARR	Marr, Jonathon	<input type="checkbox"/>											
EWRIGHT	Wright, Eric	<input type="checkbox"/>											

<p>8 Step 3: Adding Curricula of the User Needs Management wizard displays.</p> <p>9 To add a curriculum, enter the exact curriculum ID.</p> <p>9 Select Add.</p> <p>or</p> <p>10 Select the add one or more from list link to search for and select curricula.</p>	
<p>11 For this example, we added the <i>EHS First Aid and CPR</i> curriculum. One or more curricula can be added.</p> <p>Now that we have an item, we can continue with the tool.</p> <p>11 Select Next.</p>	
<p>12 Step 4: Edit Assign Dates of the User Needs Management wizard displays.</p> <p>12 Today's date defaults as the assign date, or enter another date (not in the future).</p> <p>13 Select Next.</p>	

<p>14 Step 5: Complete User Needs Management of the User Needs Management wizard displays.</p> <p>15 Review the list of affected users. Verify the item to be assigned. Adjust the required date if necessary.</p> <p>15 Select Run Job Now or Schedule Job to complete the User Needs Management wizard.</p>	 <p>User Needs Management Help</p> <p>> Step 1 > Step 2 > Step 3 > Step 4 > Step 5</p> <p>Step 5: Complete User Needs Management 15</p> <p style="text-align: right;">Previous Run Job Now Schedule Job</p> <table border="1"> <thead> <tr> <th>User ID</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>MDAY</td> <td>Day, Morris</td> </tr> <tr> <td>JMARR</td> <td>Marr, Jonathon</td> </tr> <tr> <td>EWRIGHT</td> <td>Wright, Eric</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Curriculum</th> <th>Title</th> <th>Assign Date</th> </tr> </thead> <tbody> <tr> <td>EHS-101</td> <td>First Aid and CPR</td> <td>Oct/28/2010</td> </tr> </tbody> </table> <p><i>Note: The required date which appears is calculated based on the item settings.</i></p>	User ID	Name	MDAY	Day, Morris	JMARR	Marr, Jonathon	EWRIGHT	Wright, Eric	Curriculum	Title	Assign Date	EHS-101	First Aid and CPR	Oct/28/2010
User ID	Name														
MDAY	Day, Morris														
JMARR	Marr, Jonathon														
EWRIGHT	Wright, Eric														
Curriculum	Title	Assign Date													
EHS-101	First Aid and CPR	Oct/28/2010													
<p>If you select Run Job Now, a Status page displays. The assignment was completed successfully.</p>	 <p>Finished</p> <p>Status:</p> <ul style="list-style-type: none"> Successfully added the curricula to the specified Users. 														

<p>Task E. Assign a Curriculum to Users by Associating it with a Job Position</p>	
<p>1 Navigate to Users > Job Positions.</p> <p>2 Enter criteria to find the job position to which to add a curriculum.</p> <p>3 Select Search.</p>	 <p>Home Users Performance Compensation Learning Content Commerce System Admin References</p> <p>Search: Enter Keywords or Command Go</p> <p>Job Positions Search Add New Help</p> <p>Search Saved Searches</p> <p>Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.</p> <p>Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Job Position ID: Starts With <input type="text"/></p> <p>Leads From Job: Starts With <input type="text"/></p> <p>Leads To Job: Starts With <input type="text"/></p> <p>Description: Starts With <input type="text"/></p> <p>Add/Remove Criteria</p> <p style="text-align: right;">Search Save As Reset</p>

4 In the search results list, select the edit icon () to select the job position.



Field Chooser Download Search Results 

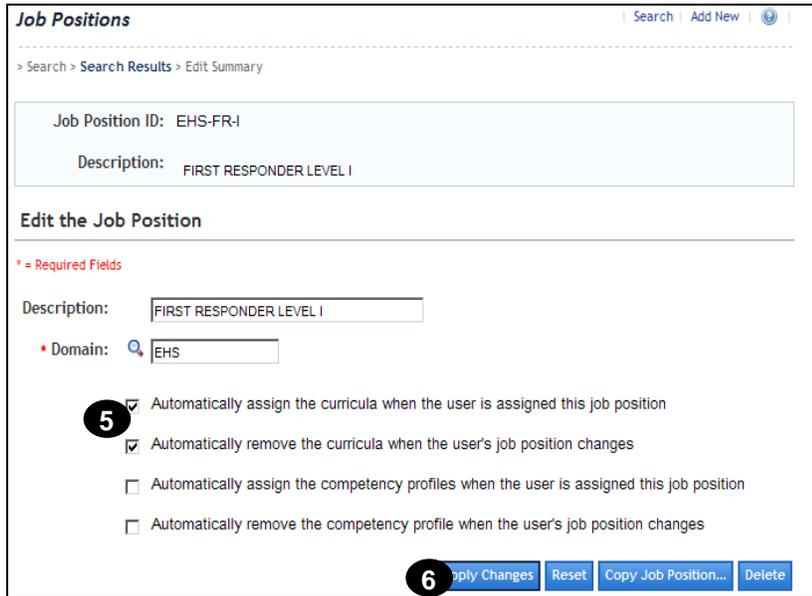
Records per Page 25 (5 total records)

Job Position ID	Description
EHS-FR-I	FIRST RESPONDER LEVEL I
EHS-FR-II	FIRST RESPONDER LEVEL II
EHS-HS-MGR	HEALTH AND SAFETY MANAGER
EHS-SAFETY-I	SAFETY OFFICER LEVEL I
EHS-SAFETY-II	SAFETY OFFICER LEVEL II

Records per Page 25 (5 total records)

5 Select the Automatically assign the curricula... and Automatically remove the curricula... checkboxes.

6 Select Apply Changes.



Job Positions Search | Add New | 

> Search > Search Results > Edit Summary

Job Position ID: EHS-FR-I
Description: FIRST RESPONDER LEVEL I

Edit the Job Position

* = Required Fields

Description:

* Domain:

5 Automatically assign the curricula when the user is assigned this job position

Automatically remove the curricula when the user's job position changes

Automatically assign the competency profiles when the user is assigned this job position

Automatically remove the competency profile when the user's job position changes

6

7 Select the Curricula tab.

8 To add a curriculum, enter the curriculum ID exactly.

9 Select Add.

or

10 Select the add one or more from list link to search for and select one or more curriculum.

11 Select the Add curricula to users who are assigned this job position checkbox.



Job Positions Search | Add New | 

> Search > Search Results > Edit Curricula

Job Position ID: EHS-FR-I
Description: FIRST RESPONDER LEVEL I

Edit the Job Position

Add a Curriculum to the Job Position **10**

Enter Curriculum ID or [add one or more from list](#).

7 **Curricula** **11** Curriculum ID: **8** **9**

Add curricula to users who are assigned this job position

For this example, we added the *EHS First Responder* curriculum. One or more curricula can be added.

All users who are assigned this job position now have this curriculum assigned to them simply because the *Add curricula to users...* checkbox was selected.

Job Positions | Search | Add New | ⌵

> Search > Search Results > Edit Curricula

Job Position ID: EHS-FR-I

Description: FIRST RESPONDER LEVEL I

Edit the Job Position

Add a Curriculum to the Job Position

Enter Curriculum ID or [add one or more from list](#).

Curriculum ID: Add

Add curricula to users who are assigned this job position

Update the Curricula for the Job Position

Apply Changes
Reset

Curriculum ID	Title	Remove
EHS-100	First Responder	Details <input type="checkbox"/>

Select All / Deselect All

Remove curricula from users who are assigned this job position

Apply Changes
Reset

Notes