

Job Aid: Manage Period-Based Curricula

Course: Learning Needs Management

Lab 10: Setting Item Periods within a Curriculum

Lab 11: Setting a Fixed, Initial Required By Date

Prerequisite Courses

- Introduction to LearningLink Learning Administration
- Learning Needs Management
- Create Curricula

Description

The purpose of this job aid is to guide administrators through the step-by-step process of configuring item periods using both event and calendar basis for both initial assignments and retraining assignments. This job aid should help answer the following questions:

- How much initial completion time should be granted to the user?
- Does an item within a curriculum have a firm required by date for all users regardless of when it is assigned?
- Do the items within the curriculum require retraining?

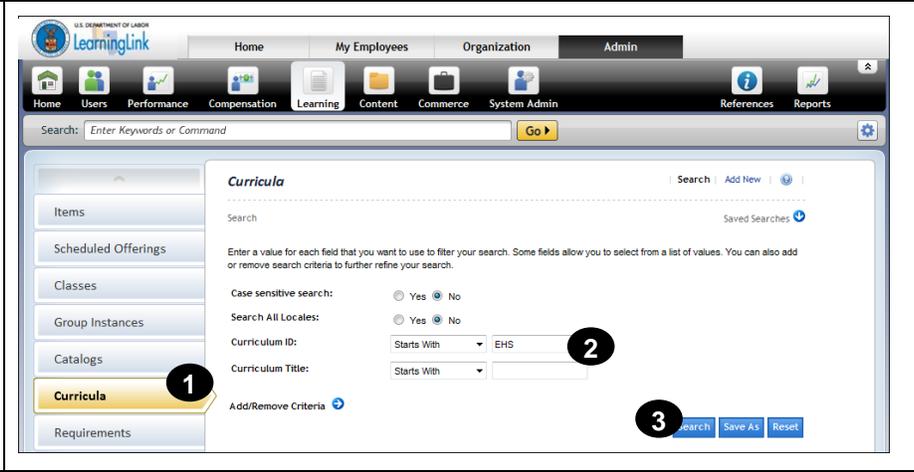
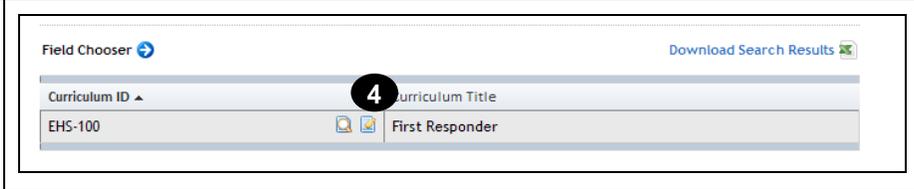
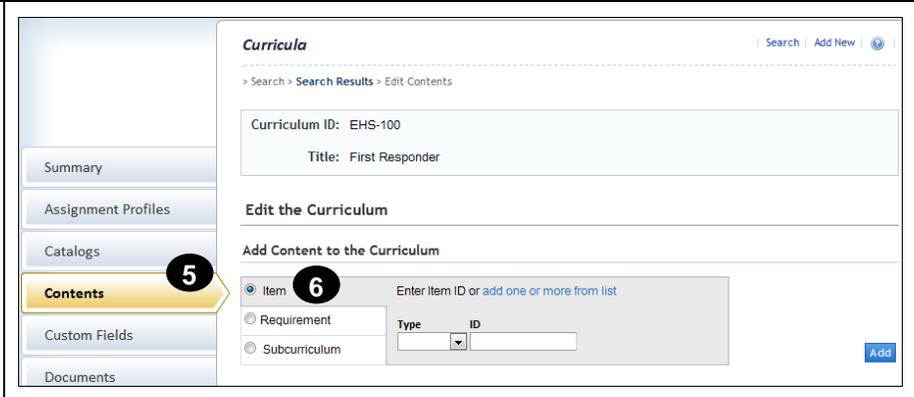
Tasks

- A. Configure Item Periods: Initial Basis - Event
- B. Configure Item Periods: Initial Basis - Calendar (Configure Fixed Initial Required By Date)
- C. Configure Item Periods: Retraining Basis - Event
- D. Configure Item Periods: Retraining Basis - Calendar

Task A. Configure Item Periods: Initial Basis - Event

Initial basis event uses the assignment date of the curriculum (item) to determine the original required by date (initial assignment) and the Learning History completion date to determine the next required by date (retaining assignment).

Example: A user is assigned an item with an initial assignment of 30 days, *initial basis - event*, and an assignment date of 10/16/2010. Plateau Learning calculates a required by date of 11/16/2010. It completes the current day period 10/16, then counts 30 days.

<p>Verify the Admin tab is selected.</p> <p>1 Navigate to Learning > Curricula.</p> <p>2 Enter criteria to find the curriculum in which to edit item periods.</p> <p>3 Select Search.</p>	
<p>4 In the search results list, select the edit icon (🔗) to select the curriculum.</p>	
<p>5 Select the Contents tab.</p> <p>6 Select Item from the Add Content to the Curriculum section.</p>	

7 Select the **Edit** link next to an item in the list.

Update Content for the Curriculum

[Remove](#) [Group Requirements](#)
[Select All / Deselect All](#)

Entity ID	Title	Display Order	Select
ONLINE EHS-121 (Rev 1 - May/14/2003 12:00 AM America/New York)	Respiratory Protection		<input type="checkbox"/>
COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Planning		<input type="checkbox"/>
COURSE EHS-102 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Response		<input type="checkbox"/>
COURSE EHS-109 (Rev 1 - May/14/2003 12:00 AM America/New York)	Fitness for Duty		<input type="checkbox"/>
COURSE EHS-107 (Rev 3 - May/14/2003 12:00 AM America/New York)	First Responder		<input type="checkbox"/>
COURSE EHS-106 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Fire Safety		<input type="checkbox"/>

8 Select the initial basis as *Event*.

9 Enter an initial number of 30.

10 Select an initial period of *Days* (*Days, Weeks, Months, Quarters, or Years*).

Do not enter retaining assignments.

11 Enter an effective date.

12 Select an assignment type.

13 Select **Apply Changes**.

Repeat steps 7-12 for each item in the curriculum.

Curriculum ID: EHS-100
Title: First Responder
Item Type: COURSE
Item ID: EHS-106
Revision Date: May/14/2003 12:00 AM America/New York
Revision Number: 1.2
Item Title: Fire Safety

[Return to Content Data](#)

13 [Apply Changes](#) [Reset](#)

**** = Required if either Initial Basis or Retraining Basis is calendar based.**

Initial Assignments:

Initial Number: **9** Initial Period: **10** Threshold: Entire Days

Initial Basis: Calendar **Event** **8**

Retraining Assignments:

Retraining Number: Retraining Period:

Retraining Basis: Calendar Event

**** Basis Date:** **11**

Effective Date: **11**

Assignment Type: **12**

Note: for more information on initial assignments, retraining assignments, effective dates, assignment type, and sequence number click the Help link at the top of the page.

14 Select the expand icon () next to each item to review assignment details.

Update Content for the Curriculum

[Remove](#) [Group Requirements](#)
[Select All / Deselect All](#)

Entity ID	Title	Display Order	Select
ONLINE EHS-121 (Rev 1 - May/14/2003 12:00 AM America/New York)	Respiratory Protection		<input type="checkbox"/>
<p>14 Initial Assignments: 30 Days - Event Threshold: N/A</p> <p>Retraining Assignments: N/A</p> <p>Effective Date: Aug/13/2003 Assignment Type: REQ (Required)</p> <p>Basis Date: Jan/1/2005</p>			
COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Planning		<input type="checkbox"/>
COURSE EHS-102 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Response		<input type="checkbox"/>

Example: Using the same assignment date of 10/16/2010 but setting an initial assignment of one month instead of 30 days, Plateau Learning generates a required by date of 11/30/2010. It completes the current month period, October, then counts one month.

<p>15 Select the initial basis as Event.</p> <p>16 Enter an initial number, 1.</p> <p>17 Select an initial period of Months (<i>Days, Weeks, Months, Quarters, or Years</i>).</p> <p>Do not enter retaining assignments.</p> <p>18 Enter an effective date.</p> <p>19 Select an assignment type.</p> <p>20 Select Apply Changes.</p>	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: right;">20</p> <p style="text-align: right;">Apply Changes Reset</p> <p><small>** = Required if either Initial Basis or Retraining Basis is calendar based.</small></p> <p>Initial Assignments:</p> <p>Initial Number: 16 <input type="text" value="1"/> Initial Period: 17 <input type="text" value="Months"/> Threshold: <input type="radio"/> Entire <input checked="" type="radio"/> <input type="text" value=""/> Days</p> <p>Initial Basis: <input type="radio"/> Calendar <input checked="" type="radio"/> Event 15</p> <p>Retraining Assignments:</p> <p>Retraining Number: <input type="text"/> Retraining Period: <input type="text" value="Days"/></p> <p>Retraining Basis: <input type="radio"/> Calendar <input checked="" type="radio"/> Event</p> <p>** Basis Date: <input type="text" value="Jan/1/2005"/> (MMM/d/yyyy)</p> <p>Effective Date: <input type="text" value="OCT/28/2010"/> 18 (MMM/d/yyyy)</p> <p>Assignment Type: <input type="text" value="REQ (Required)"/> 19</p> </div>
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Example: Finally, using the same assignment date of 10/16/2010 but changing the initial assignment to one year, Plateau Learning calculates a required by date of 12/31/2011. It completes the current year period, 2010, then counts one year.

<p>21 Select the initial basis as Event.</p> <p>22 Enter an initial number, 1.</p> <p>23 Select an initial period of Years (<i>Days, Weeks, Months, Quarters, or Years</i>).</p> <p>Do not enter retaining assignments.</p> <p>24 Enter an effective date.</p> <p>25 Select an assignment type.</p> <p>26 Select Apply Changes.</p>	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: right;">26</p> <p style="text-align: right;">Apply Changes Reset</p> <p><small>** = Required if either Initial Basis or Retraining Basis is calendar based.</small></p> <p>Initial Assignments:</p> <p>Initial Number: 22 <input type="text" value="1"/> Initial Period: 23 <input type="text" value="Years"/> Threshold: <input type="radio"/> Entire <input checked="" type="radio"/> <input type="text" value=""/> Days</p> <p>Initial Basis: <input type="radio"/> Calendar <input checked="" type="radio"/> Event 21</p> <p>Retraining Assignments:</p> <p>Retraining Number: <input type="text"/> Retraining Period: <input type="text" value="Days"/></p> <p>Retraining Basis: <input type="radio"/> Calendar <input checked="" type="radio"/> Event</p> <p>** Basis Date: <input type="text" value="Jan/1/2005"/> (MMM/d/yyyy)</p> <p>Effective Date: <input type="text" value="OCT/28/2010"/> 24 (MMM/d/yyyy)</p> <p>Assignment Type: <input type="text" value="REQ (Required)"/> 25</p> </div>
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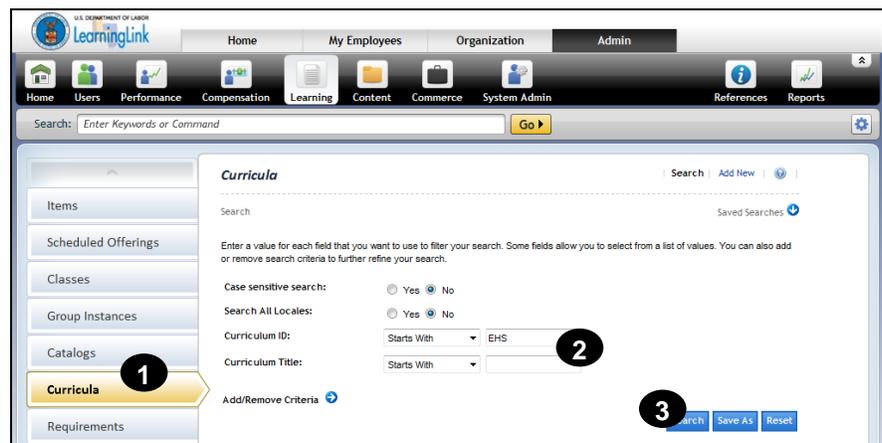
Task B. Configure Item Periods: Initial Basis - Calendar (Configure Fixed Initial Required By Date)

Initial basis calendar uses a basis date which is set at the item level within a curriculum. This prompts the system to start its date calculations from that basis date instead of January 1st. This allows administrators to set a fixed required by date for initial assignments and intervals for retraining periods.

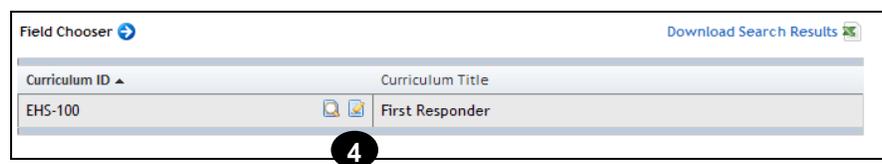
Example: For initial assignments, if an administrator uses *initial basis - calendar*, they can set a fixed required by date for all users regardless of what date the curriculum (item) is assigned. Using a basis date of 10/01/2009, and a 30 day initial assignment period, Plateau Learning creates intervals starting on 10/01/2009, each running for 30 days. If an item is assigned anywhere within that 30 day interval (10/01/2009 - 10/30/2009), Plateau Learning calculates a required by date of 10/30/2009.

Interval 1	10/01/2009 – 10/30/2009
Interval 2	10/31/2009 – 11/30/2009
Interval 3	12/01/2009 – 12/30/2009
Interval 4	12/31/2009 – 1/30/2010

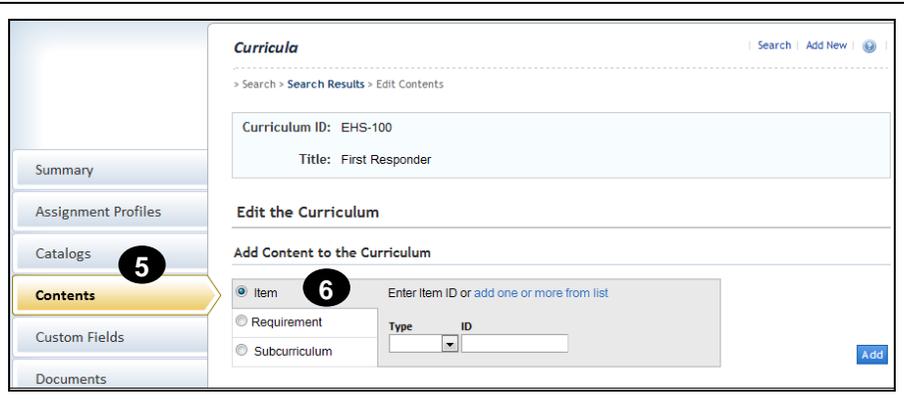
- 1 Navigate to Learning > Curricula.
- 2 Enter criteria to find the curriculum in which to edit item periods.
- 3 Select Search.



- 4 In the search results list, select the edit icon (🔗) to select the curriculum.



- 5 Select the **Content** tab.
- 6 Select **Item** from the Add Content to the Curriculum section.

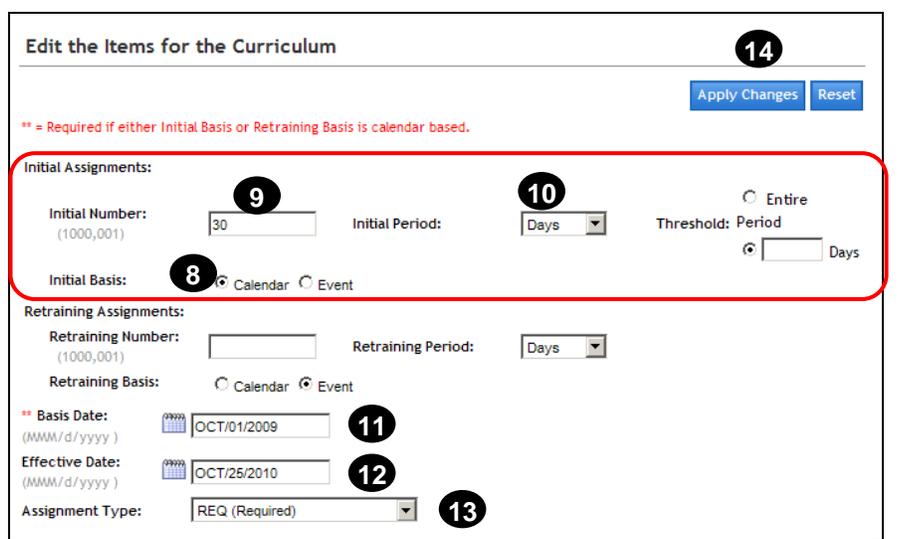


- 7 Select the **Edit** link next to an item in the list.

Entity ID	Title	Display Order	Select
ONLINE EHS-121 (Rev 1 - May/14/2003 12:00 AM America/New York)	Respiratory Protection	Edit	<input type="checkbox"/>
COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Planning	Edit	<input type="checkbox"/>
COURSE EHS-102 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Response	Edit	<input type="checkbox"/>
COURSE EHS-109 (Rev 1 - May/14/2003 12:00 AM America/New York)	Fitness for Duty	Edit	<input type="checkbox"/>
COURSE EHS-107 (Rev 3 - May/14/2003 12:00 AM America/New York)	First Responder	Edit	<input type="checkbox"/>
COURSE EHS-106 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Fire Safety	Edit	<input type="checkbox"/>

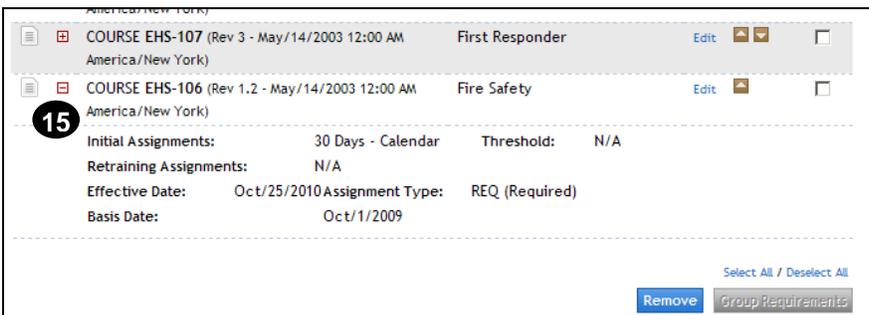
Remove Group Requirements

- Initial Assignments Configuration*
- 8 Select the initial basis as **Calendar**.
 - 9 Enter an initial number of **30**.
 - 10 Select an initial period of **Days** (*Days, Weeks, Months, Quarters, or Years*).
 - Do not enter retaining assignments.
 - 11 Enter a basis date of **10/01/2009**.
 - 12 Enter an effective date (equivalent to a grace period) of today's date, or any date in the past.
 - 13 Select an assignment type.
 - 14 Select **Apply Changes**.

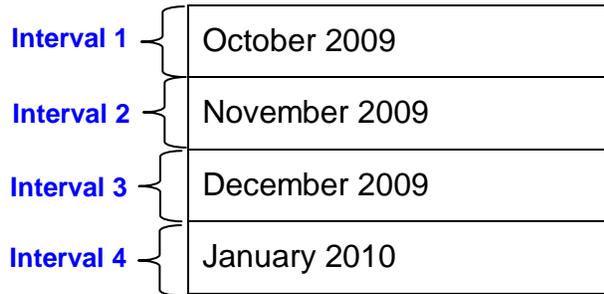


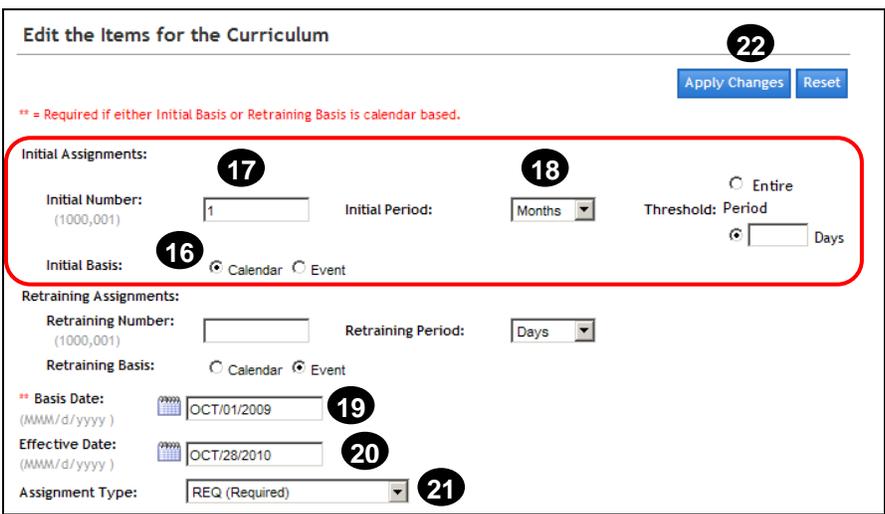
*Note: For more information on initial assignments, retraining assignments, effective dates, assignment type, and sequence number click the **Help** link at the top of the page.*

*Note: If a user has the item assigned close to the fixed required by date, the admin can configure the item to give users the rest of the current period plus the next full period. This is accomplished by setting the **threshold days** with the number of days into the period, that when an assignment occurs, it should skip the remainder of the current period*

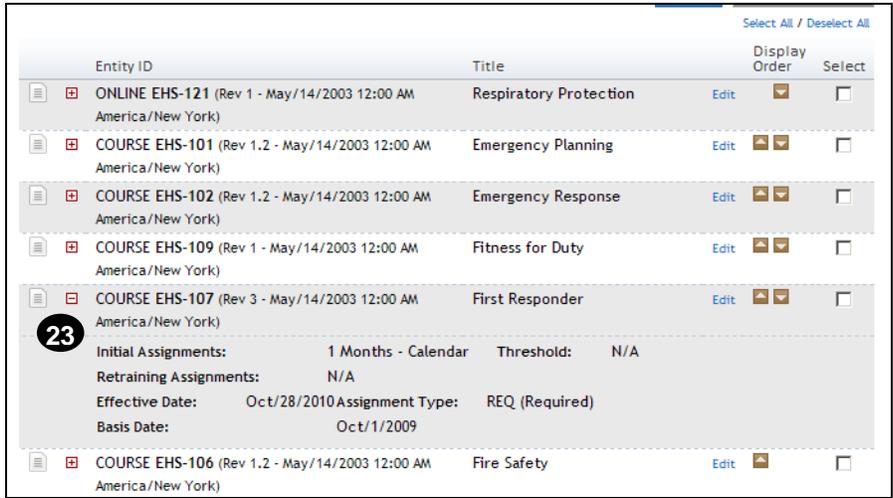
	<p>and set the required by date to the end of the next full period.</p>
<p>15 Select the expand icon (⊕) next to each item to review assignment details.</p>	

Example: Using the same basis date of 10/01/2009, and a 1 month initial assignment period (instead of 30 days), Plateau Learning creates intervals starting on 10/01/2009, each running for 1 month. If an item is assigned anywhere within that 1 month interval (10/01/2009 - 10/31/2009), Plateau Learning calculates a required by date of 10/31/2009.



<p><i>Initial Assignments Configuration</i></p> <p>16 Select the initial basis as Calendar.</p> <p>17 Enter an initial number of 1.</p> <p>18 Select an initial period of Months (Days, Weeks, Months, Quarters, or Years). Do not enter retaining assignments.</p> <p>19 Enter a basis date of 10/01/2009.</p> <p>20 Enter an effective date.</p> <p>21 Select an assignment type.</p> <p>22 Select Apply Changes.</p>	
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23 Select the **expand icon** (⊞) next to each item to review assignment details.



The screenshot shows a table of curriculum items. The expanded view for 'COURSE EHS-107' includes the following details:

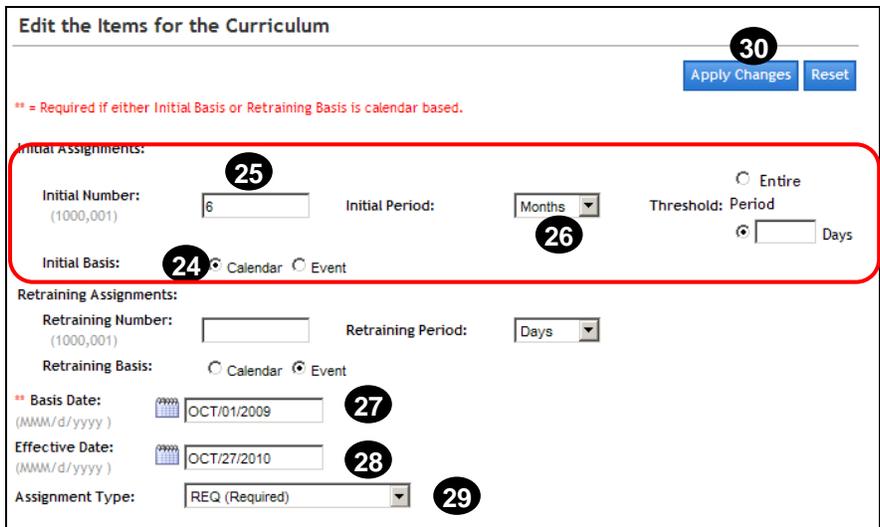
- Initial Assignments: 1 Months - Calendar Threshold: N/A
- Retraining Assignments: N/A
- Effective Date: Oct/28/2010 Assignment Type: REQ (Required)
- Basis Date: Oct/1/2009

Example: Using the same basis date of 10/01/2009, and a 6 month initial assignment period (instead of 1 month), Plateau Learning creates intervals starting on 10/01/2009, each running for 6 months. If an item is assigned anywhere within that 6 month interval (10/01/2009 - 03/31/2010), Plateau Learning calculates a required by date of 03/31/2010.

Interval 1	October 2009	November 2009	December 2009
	January 2010	February 2010	March 2010
Interval 2	April 2010	May 2010	June 2010
	July 2010	August 2010	September 2010

Initial Assignments Configuration

- 24** Select the initial basis as **Calendar**.
- 25** Enter initial number of **6**.
- 26** Select an initial period of **Months** (*Days, Weeks, Months, Quarters, or Years*).
- Do not enter retaining assignments.
- 27** Enter a basis date of 10/01/2009.
- 28** Enter an effective date.
- 29** Select an assignment type.
- 30** Select **Apply Changes**.



The screenshot shows the 'Edit the Items for the Curriculum' form. The 'Initial Assignments' section is highlighted with a red box. The form includes the following fields and options:

- Initial Number:** 6 (25)
- Initial Period:** Months (26)
- Initial Basis:** Calendar (24)
- Retraining Assignments:** Retraining Number, Retraining Period (Days)
- Retraining Basis:** Calendar (selected), Event
- Basis Date:** OCT/01/2009 (27)
- Effective Date:** OCT/27/2010 (28)
- Assignment Type:** REQ (Required) (29)
- Buttons:** Apply Changes (30), Reset

31 Select the **expand icon** (⊕) next to each item to review assignment details.

Entity ID	Title	Display Order	Select
⊕ ONLINE EHS-121 (Rev 1 - May/14/2003 12:00 AM America/New York)	Respiratory Protection	Edit Edit	<input type="checkbox"/>
⊕ COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Planning	Edit Edit	<input type="checkbox"/>
⊕ COURSE EHS-102 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Response	Edit Edit	<input type="checkbox"/>
⊕ COURSE EHS-109 (Rev 1 - May/14/2003 12:00 AM America/New York)	Fitness for Duty	Edit Edit	<input type="checkbox"/>
<p>31 Initial Assignments: 6 Months - Calendar Threshold: N/A Retraining Assignments: N/A Effective Date: Oct/27/2010 Assignment Type: REQ (Required) Basis Date: Oct/1/2009</p>			
⊕ COURSE EHS-107 (Rev 3 - May/14/2003 12:00 AM America/New York)	First Responder	Edit Edit	<input type="checkbox"/>
⊕ COURSE EHS-106 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Fire Safety	Edit Edit	<input type="checkbox"/>

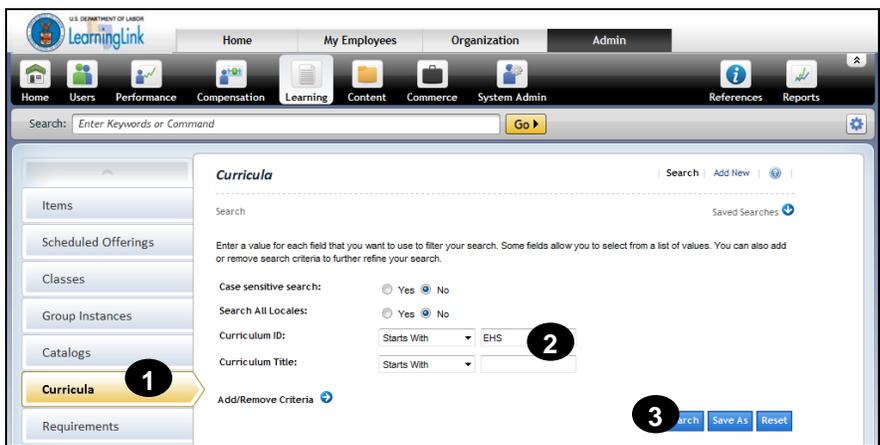
Task C. Configure Item Periods: Retraining Basis - Event

Retraining basis event uses the Learning History completion date to determine the next required by date (retaining assignment).

Example: A user is assigned an item with an initial assignment of 30 days, *initial basis - event*, and an assignment date of 10/16/2010. This item requires retraining every 90 days, *retraining basis - event*.

Plateau Learning calculates an initial required by date of 11/16/2010. (It completes the current day period 10/16, then counts 30 days.) If the user completes the item on 11/01/2010 (this date is recorded in Learning History), then it will be due again 90 days from date of initial completion, 01/30/2011.

- 1** Navigate to Learning > Curricula.
- 2** Enter criteria to find the curriculum in which to edit item periods.
- 3** Select Search.



The screenshot shows the LearningLink interface for searching curricula. The 'Curricula' section is active in the left sidebar. The search criteria are: Case sensitive search: No; Search All Locales: No; Curriculum ID: Starts With EHS; Curriculum Title: Starts With. The 'Search' button is highlighted with a circled '3'.

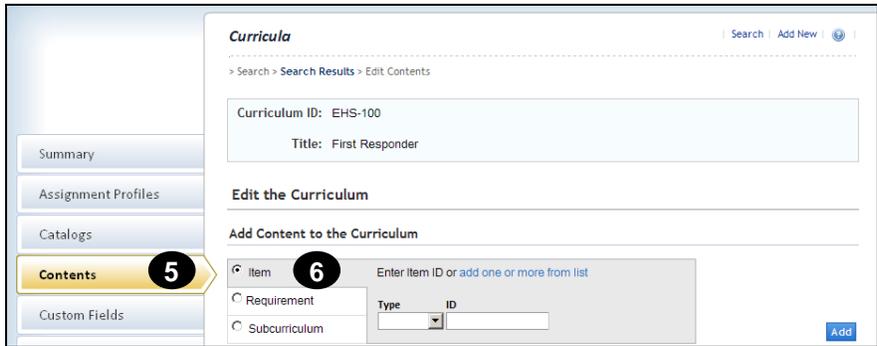
- 4** In the search results list, select the **edit icon** (✎) to select the curriculum.

Curriculum ID	Curriculum Title
EHS-100	First Responder

The 'Edit' icon (✎) next to the curriculum ID 'EHS-100' is highlighted with a circled '4'.

5 Select the **Content** tab.

6 Select **Item** from the Add Content to the Curriculum section.



7 Select the **Edit** link next to an item in the list.

Update Content for the Curriculum

Remove Group Requirements

Select All / Deselect All

Entity ID	Title	Display Order	Select
ONLINE EHS-121 (Rev 1 - May/14/2003 12:00 AM America/New York)	Respiratory Protection	Edit	<input type="checkbox"/>
COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Planning	Edit	<input type="checkbox"/>
COURSE EHS-102 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Response	Edit	<input type="checkbox"/>
COURSE EHS-109 (Rev 1 - May/14/2003 12:00 AM America/New York)	Fitness for Duty	Edit	<input type="checkbox"/>
COURSE EHS-107 (Rev 3 - May/14/2003 12:00 AM America/New York)	First Responder	Edit	<input type="checkbox"/>
COURSE EHS-106 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Fire Safety	Edit	<input type="checkbox"/>

8 Select the retraining basis as **Event**.

9 Enter a retraining number of 90.

10 Select a retraining period of **Days** (*Days, Weeks, Months, Quarters, or Years*).

11 Enter an effective date.

12 Select an assignment type.

13 Select **Apply Changes**.

Repeat steps 7-12 for each item in the curriculum.

Edit the Items for the Curriculum

Apply Changes Reset

** = Required if either Initial Basis or Retraining Basis is calendar based.

Initial Assignments:

Initial Number: Initial Period: Threshold: Entire Days

Initial Basis: Calendar Event

Retraining Assignments:

Retraining Number: Retraining Period: **10**

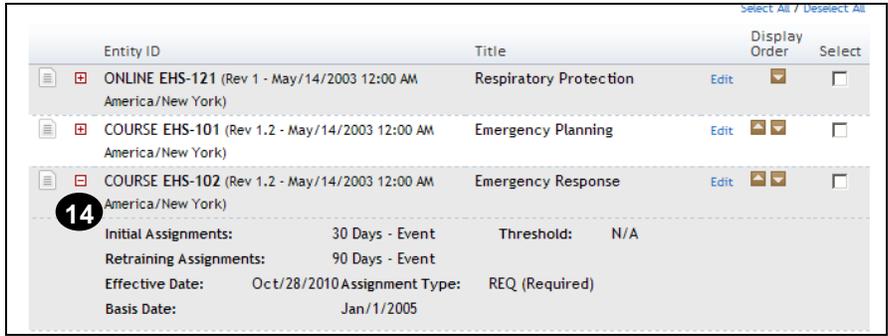
Retraining Basis: Calendar Event **8**

** Basis Date: **11**

Effective Date: **11**

Assignment Type: **12**

14 Select the **expand icon** (⊕) next to each item to review assignment details.



Entity ID	Title	Display Order	Select
ONLINE EHS-121 (Rev 1 - May/14/2003 12:00 AM America/New York)	Respiratory Protection	Edit	☑
COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Planning	Edit	☑
COURSE EHS-102 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Response	Edit	☑

14 Initial Assignments: 30 Days - Event Threshold: N/A
Retraining Assignments: 90 Days - Event
Effective Date: Oct/28/2010 Assignment Type: REQ (Required)
Basis Date: Jan/1/2005

Example: Using the same assignment date of 10/16/2010 with an initial assignment of 30 days, but instead of a 90 day retraining period it is a 3-month period, Plateau Learning generates an initial required by date of 11/16/2010. If the user completes the item on 11/01/2010 (this date is recorded in Learning History), then it will be due again on 02/28/2011. The system completes the current month period, November, then counts three full months.

Retraining Assignments Configuration

15 Select the retraining basis as **Event**.

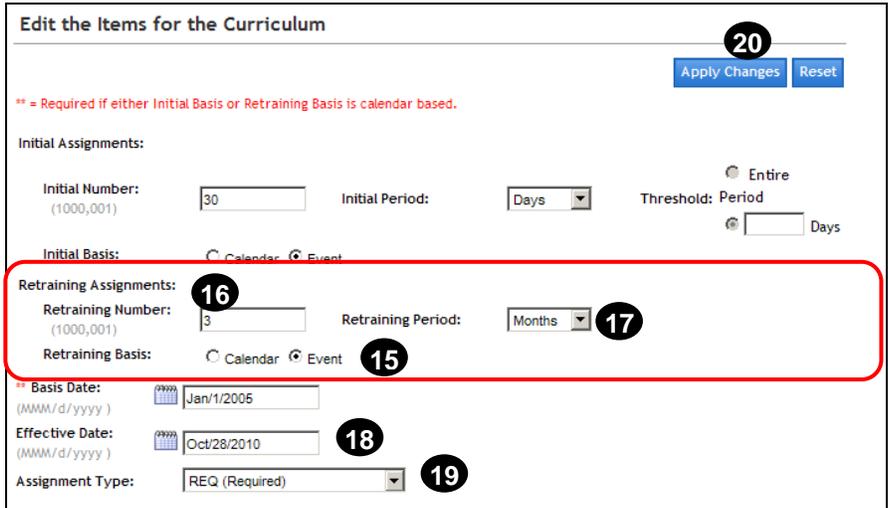
16 Enter a retraining number of **3**.

17 Select a retraining period of **Months** (*Days, Weeks, Months, Quarters, or Years*).

18 Enter an effective date.

19 Select an assignment type.

20 Select **Apply Changes**.



20 Apply Changes Reset

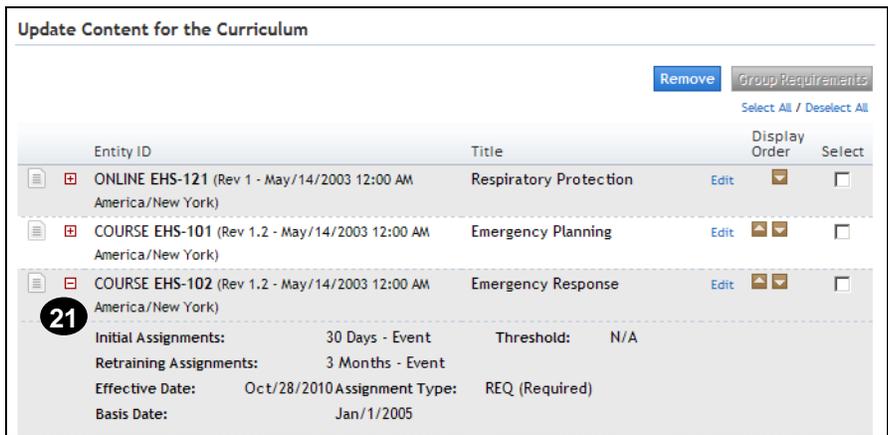
** = Required if either Initial Basis or Retraining Basis is calendar based.

Initial Assignments:
Initial Number: 30 Initial Period: Days Threshold: Period
Initial Basis: Calendar Event

Retraining Assignments:
Retraining Number: 3 Retraining Period: Months
Retraining Basis: Calendar Event

** Basis Date: Jan/1/2005
Effective Date: Oct/28/2010
Assignment Type: REQ (Required)

21 Select the **expand icon** (⊕) next to each item to review assignment details.



Entity ID	Title	Display Order	Select
ONLINE EHS-121 (Rev 1 - May/14/2003 12:00 AM America/New York)	Respiratory Protection	Edit	☑
COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Planning	Edit	☑
COURSE EHS-102 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Response	Edit	☑

21 Initial Assignments: 30 Days - Event Threshold: N/A
Retraining Assignments: 3 Months - Event
Effective Date: Oct/28/2010 Assignment Type: REQ (Required)
Basis Date: Jan/1/2005

Example: Using the same assignment date of 10/16/2010 with an initial assignment of 30 days, but instead of a 3-month retraining period it is a 1 year period, Plateau Learning generates an initial required by date of 11/16/2010. If the user completes the item on 11/01/2010 (this date is recorded in Learning History), then it will be due again on 12/31/2011. The system completes the current year period, 2010, then counts 1 year.

<p>22 <i>Retraining Assignments Configuration</i></p> <p>22 Select the retraining basis as Event.</p> <p>23 Enter a retraining number of 1.</p> <p>24 Select a retraining period of Years (<i>Days, Weeks, Months, Quarters, or Years</i>).</p> <p>25 Enter an effective date.</p> <p>26 Select an assignment type.</p> <p>27 Select Apply Changes.</p>	<div data-bbox="581 411 1468 894"> <h3>Edit the Items for the Curriculum</h3> <p>27 Apply Changes Reset</p> <p>** = Required if either Initial Basis or Retraining Basis is calendar based.</p> <p>Initial Assignments:</p> <p>Initial Number: <input type="text" value="30"/> Initial Period: <input type="text" value="Days"/> Threshold: <input type="radio"/> Entire <input checked="" type="radio"/> <input type="text" value=""/> Days</p> <p>Initial Basis: <input type="radio"/> Calendar <input checked="" type="radio"/> Event</p> <p>Retraining Assignments:</p> <p>Retraining Number: <input type="text" value="1"/> Retraining Period: <input type="text" value="Years"/> 24</p> <p>Retraining Basis: <input type="radio"/> Calendar <input checked="" type="radio"/> Event 22</p> <p>Basis Date: <input type="text" value="Jan/1/2005"/> 23</p> <p>Effective Date: <input type="text" value="OCT/27/2010"/> 25</p> <p>Assignment Type: <input type="text" value="REQ (Required)"/> 26</p> </div>												
<p>28 Select the expand icon (⊕) next to each item to review assignment details.</p>	<div data-bbox="581 974 1468 1348"> <h3>Update Content for the Curriculum</h3> <p>Remove Group Requirements</p> <p>Select All / Deselect All</p> <table border="1"> <thead> <tr> <th>Entity ID</th> <th>Title</th> <th>Display Order</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td>⊕ ONLINE EHS-121 (Rev 1 - May/14/2003 12:00 AM America/New York)</td> <td>Respiratory Protection</td> <td>Edit</td> <td>⌵ <input type="checkbox"/></td> </tr> <tr> <td>⊕ COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)</td> <td>Emergency Planning</td> <td>Edit</td> <td>⌵ <input type="checkbox"/></td> </tr> </tbody> </table> <p>28</p> <p>Initial Assignments: 30 Days - Event Threshold: N/A</p> <p>Retraining Assignments: 1 Years - Event</p> <p>Effective Date: Oct/27/2010 Assignment Type: REQ (Required)</p> <p>Basis Date: Jan/1/2005</p> </div>	Entity ID	Title	Display Order	Select	⊕ ONLINE EHS-121 (Rev 1 - May/14/2003 12:00 AM America/New York)	Respiratory Protection	Edit	⌵ <input type="checkbox"/>	⊕ COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Planning	Edit	⌵ <input type="checkbox"/>
Entity ID	Title	Display Order	Select										
⊕ ONLINE EHS-121 (Rev 1 - May/14/2003 12:00 AM America/New York)	Respiratory Protection	Edit	⌵ <input type="checkbox"/>										
⊕ COURSE EHS-101 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Emergency Planning	Edit	⌵ <input type="checkbox"/>										

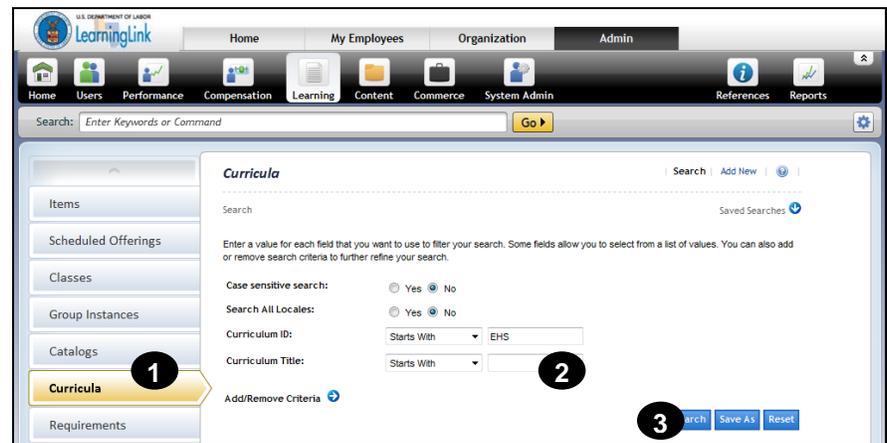
Task D. Configure Item Periods: Retraining Basis - Calendar

Retraining basis calendar, for retraining periods, allows admins to create different intervals using the basis date. This prompts the system to start its date calculations from that basis date instead of January 1st. This can be useful for training that is due at the end of a fiscal year. If an administrator uses *retraining basis - calendar*, they can set fixed retraining intervals for all users regardless of what date the curriculum (item) is assigned. An admin specifies the start of the calendar basis date in the item details. In the following grid, the basis date is 10/01/2010 and has calendar basis period of 30 days. Therefore, Plateau Learning creates intervals starting on 10/01/2010, each running for 30 days.

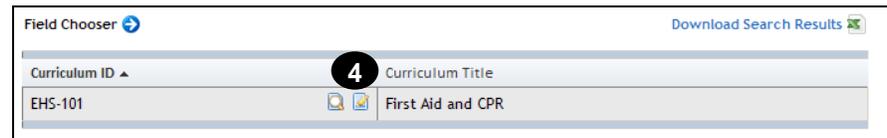
Example: If a user completes the item on 10/15/2010 with a retraining assignment of 30 days using the below *retraining basis - calendar*. Plateau Learning generates a new required by date of 11/30/2010. It completes the current calendar period, Interval 1, and then looks for the end of the next interval.

Interval 1	10/01/2010 – 10/30/2010
Interval 2	10/31/2010 – 11/30/2010
Interval 3	12/01/2010 – 12/30/2010
Interval 4	12/31/2010 – 1/30/2011

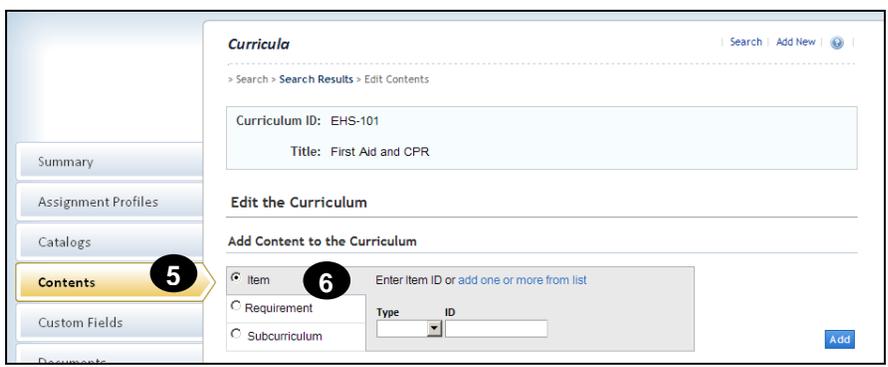
- 1 Navigate to Learning > Curricula.
- 2 Enter criteria to find the curriculum in which to edit item periods.
- 3 Select Search.



- 4 In the search results list, select the edit icon (✎) to select the curriculum.



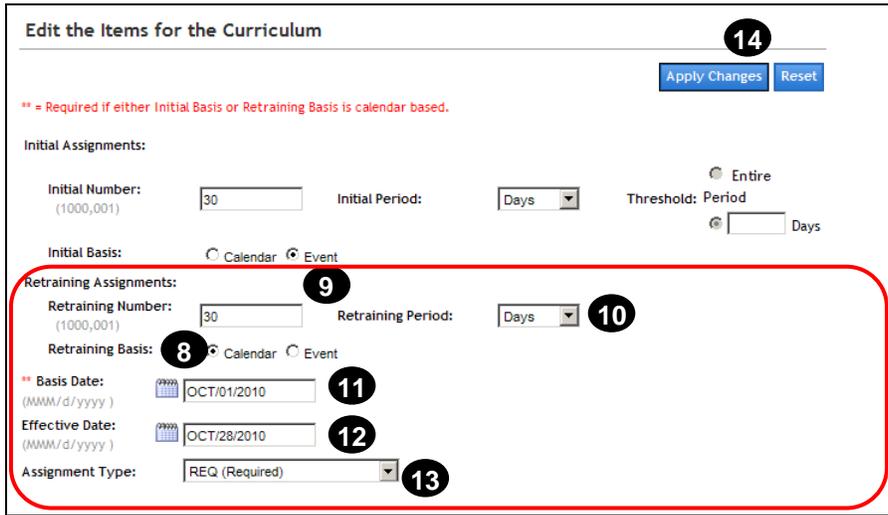
- 5 Select the **Content** tab.
- 6 Select **Item** from the Add Content to the Curriculum section.



- 7 Select the **Edit** link next to an item in the list.

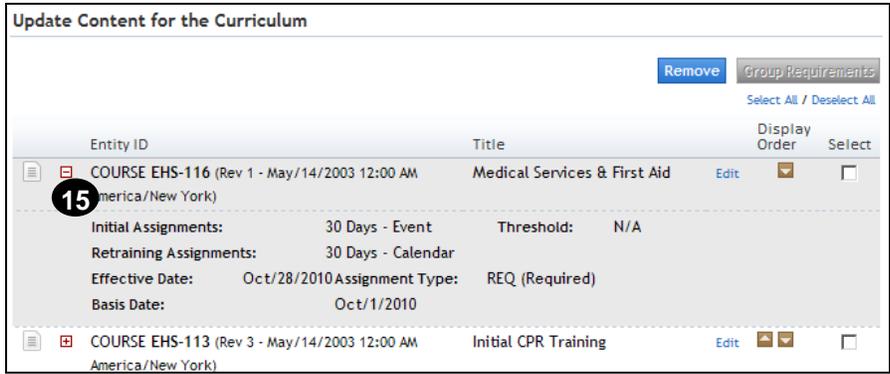


- Retraining Assignments Configuration*
- 8 Select the retraining basis as **Calendar**.
 - 9 Enter a retraining number of **30**.
 - 10 Select a retraining period of **Days** (*Days, Weeks, Months, Quarters, or Years*).
 - 11 Enter a basis date of **10/01/2010**.
 - 12 Enter an effective date (equivalent to a grace period) of today's date, or any date in the past.
 - 13 Select an assignment type.
 - 14 Select **Apply Changes**.
(Repeat steps 7-13 for each item in the curriculum.)



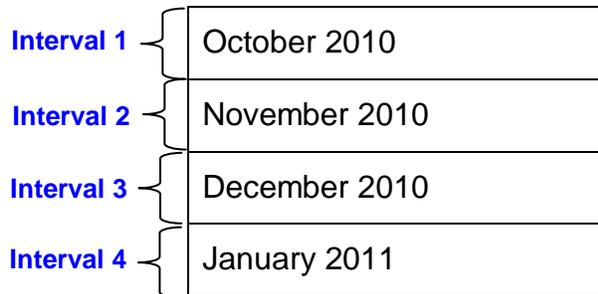
Note: For more information on initial assignments, retraining assignments, effective dates, assignment type, and sequence number click the [Help link](#) at the top of the page.

15 Select the expand icon (⊞) next to each item to review assignment details.



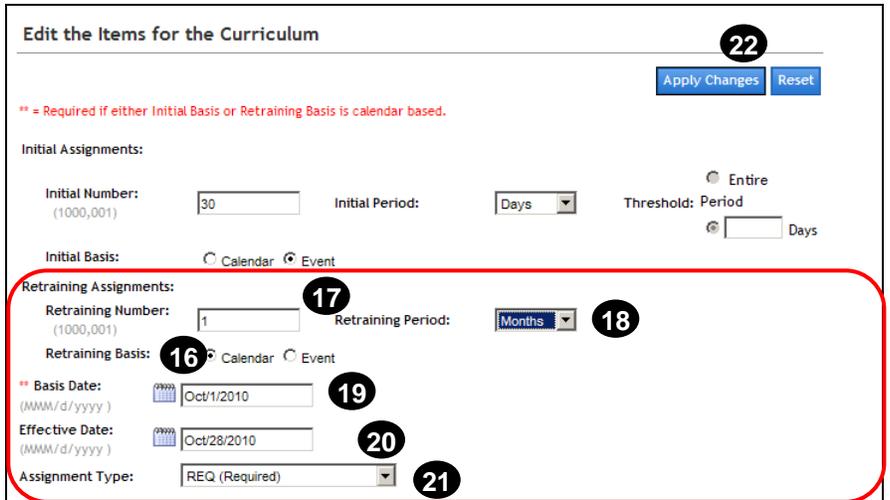
Entity ID	Title	Display Order	Select
15 COURSE EHS-116 (Rev 1 - May/14/2003 12:00 AM America/New York)	Medical Services & First Aid	Edit	☑
Initial Assignments: 30 Days - Event Threshold: N/A Retraining Assignments: 30 Days - Calendar Effective Date: Oct/28/2010 Assignment Type: REQ (Required) Basis Date: Oct/1/2010			
COURSE EHS-113 (Rev 3 - May/14/2003 12:00 AM America/New York)	Initial CPR Training	Edit	☐

Example: If a user completes the item on 10/15/2010 with a retraining assignment of 1 month using the below *retraining basis - calendar*, Plateau Learning generates a new required by date of 11/30/2010. It completes the current calendar period, Interval 1, and then looks for the end of the next interval.



Retraining Assignments Configuration

- 16 Select the retraining basis as **Calendar**.
- 17 Enter a retraining number of **1**.
- 18 Select a retraining period of **Months** (*Days, Weeks, Months, Quarters, or Years*).
- 19 Enter a basis date of **10/01/2010**.
- 20 Enter an effective date.
- 21 Select an assignment type.
- 22 Select **Apply Changes**.



22 Apply Changes Reset

** = Required if either Initial Basis or Retraining Basis is calendar based.

Initial Assignments:

Initial Number: (1000,001) Initial Period: Threshold: Entire Period Days

Initial Basis: Calendar Event

Retraining Assignments:

Retraining Number: (1000,001) Retraining Period: **18**

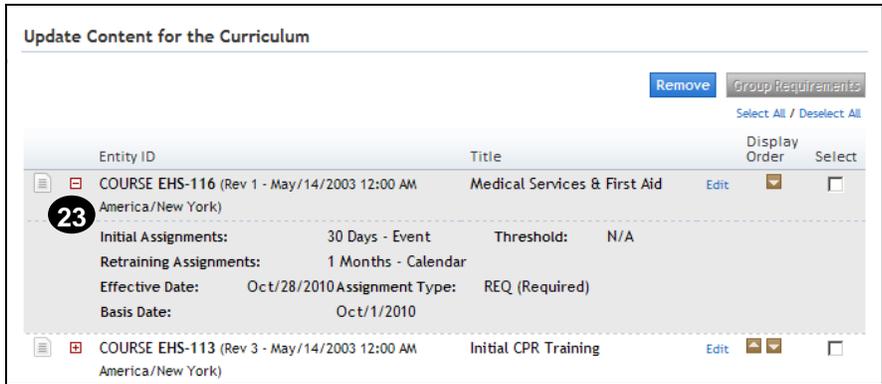
Retraining Basis: **16** Calendar Event

** Basis Date: (MM/DD/YYYY) **19**

Effective Date: (MM/DD/YYYY) **20**

Assignment Type: **21**

23 Select the **expand icon** (⊞) next to each item to review assignment details.



Example: If a user completes the item on 10/15/2010 with a retraining assignment of 6 months using the below *retraining basis - calendar*, Plateau Learning generates a new required by date of 09/30/2011. It completes the current calendar period, Interval 1, and then looks for the end of the next interval.

Interval 1	October 2010	November 2010	December 2010
	January 2011	February 2011	March 2011
Interval 2	April 2011	May 2011	June 2011
	July 2011	August 2011	September 2011

Retraining Assignments Configuration

24 Select the retraining basis as **Calendar**.

25 Enter a retraining number of 6.

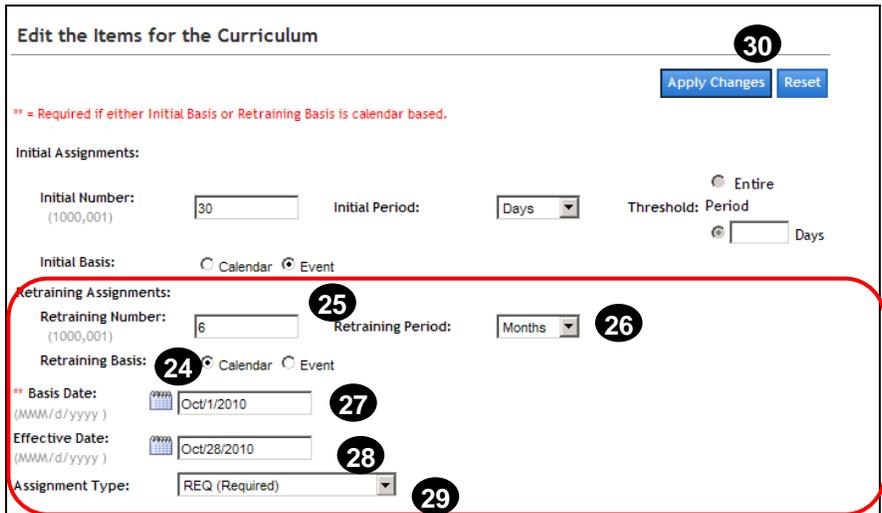
26 Select a retraining period of **Months** (*Days, Weeks, Months, Quarters, or Years*).

27 Enter a basis date of 10/01/2010.

28 Enter an effective date.

29 Select an assignment type.

30 Select **Apply Changes**.



31 Select the expand icon (⊕) next to each item to review assignment details.

Update Content for the Curriculum

[Remove](#) [Group Requirements](#)
[Select All](#) / [Deselect All](#)

Entity ID	Title	Display Order	Select
  COURSE EHS-116 (Rev 1 - May/14/2003 12:00 AM America/New York)	Medical Services & First Aid	Edit	<input type="checkbox"/>
<p>31</p> <p>Initial Assignments: 30 Days - Event Threshold: N/A Retraining Assignments: 6 Months - Calendar Effective Date: Oct/28/2010 Assignment Type: REQ (Required) Basis Date: Oct/1/2010</p>			
  COURSE EHS-113 (Rev 3 - May/14/2003 12:00 AM America/New York)	Initial CPR Training	Edit	<input type="checkbox"/>



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Notes