Job Aid: Edit Instructor-Led Items	**Course: Learning Needs Management** **Lab 2: Edit Items - Design Data Tab** **Lab 3: Edit Items - Delivery Data Tab** **Lab 4: Edit Items - Catalogs Tab** **Lab 5: Edit Items - Subject Areas Tab**

Prerequisite

- Introduction to LearningLink Learning Administration
- Learning Needs Management
- Job Aid: Add New Item

Description

The purpose of this job aid is to guide administrators through the step-by-step process of editing an instructor-led item. Related terminology is provided.

Tasks

A. Identify Item Classification and Review Summary Tab
B. Configure Item: Design Data Tab
C. Configure Item: Delivery Data Tab
D. Configure Item: Catalog Tab
E. Configure Item: Subject Areas Tab
F. Configure Item: Notifications Tab

Terminology:

Classification: There are four classifications in the system: *Instructor-led*, *Online* item, *Blended* (both online content and instructor-led content), and *Other* (such as physical goods). Classifications are automatically assigned based on whether the item has segments and/or online content.

Item Tabs:

Design Tab: Information on this tab includes:

- Reviser and approver name with approval date
- Default credit hours
- Default Initial Assignments: These fields determine how long a user has to complete an item from when it was placed on his/her Learning Plan/To-Do List.
- Default Retraining Assignments: Length of time users have to take and complete an item after they initially complete the item. These fields are used only when the item is assigned as part of a curriculum.
- Contact's email (this works with the Item Scheduling Demand APM)
- Item goals

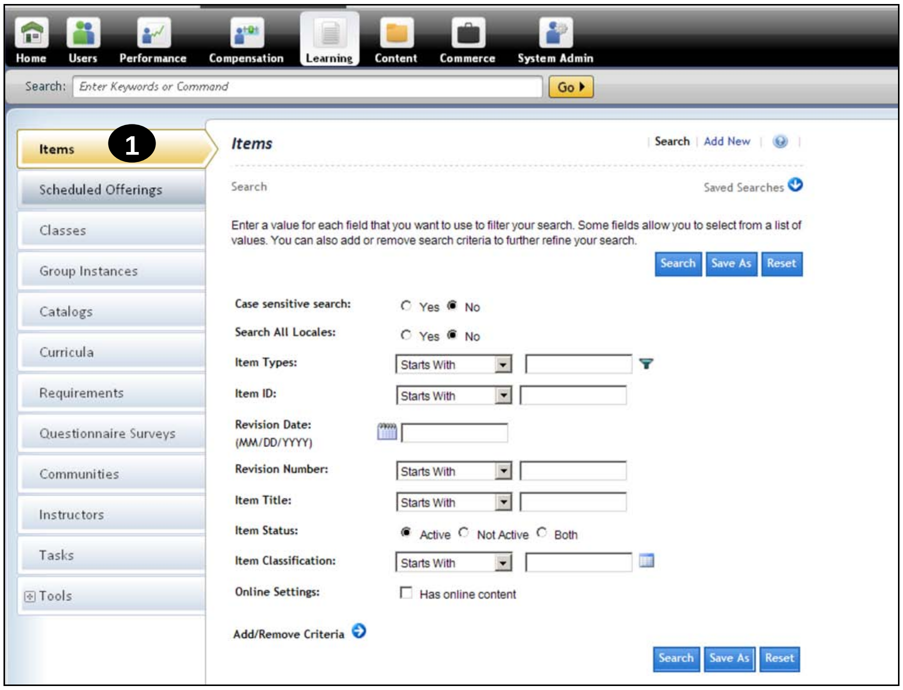
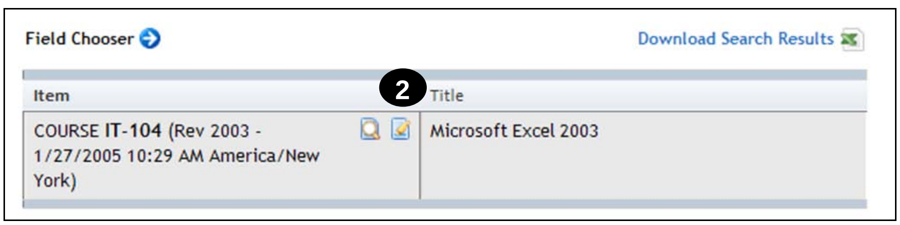
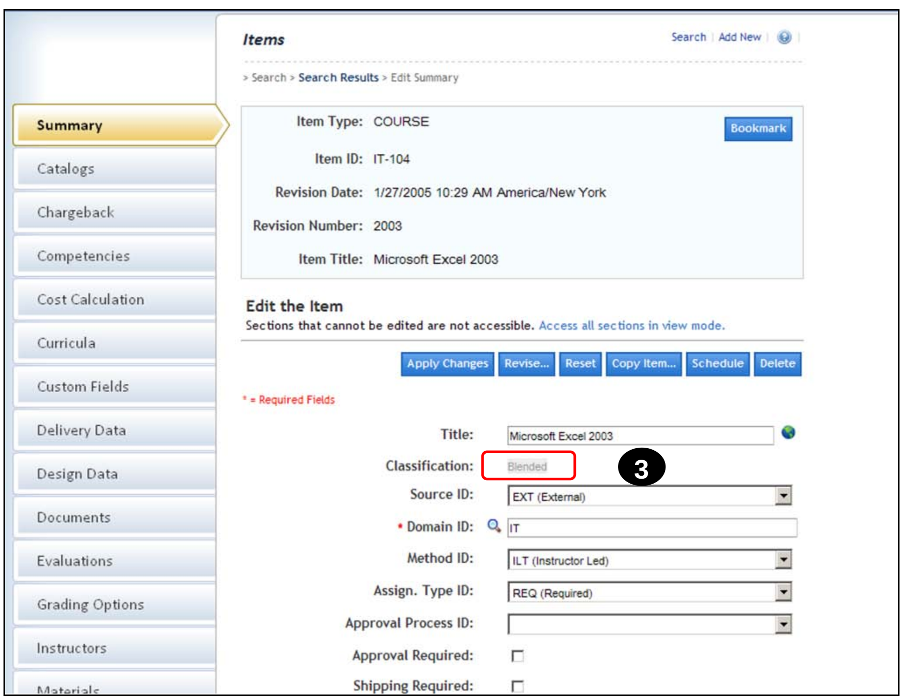
Delivery Data Tab: Information on this tab includes:

- Default Minimum Registration: When the number of users who have requested registration for this item reaches this number, an email is sent to the contact (found in Design Data tab) to recommend scheduling this item.
- Default Maximum Registration
- Prep Time (instructor)
- Self Registration checkbox
- Default Segment Structure: Establishes timeframes and identifies location types, materials, and types of equipment for scheduling an instructor-led course
- Default Location Type

Catalog Tab: A catalog is used to make items that are not a part of the Learning Plan viewable to users. Access to one or more catalogs is based on assignment profiles. In order for a user to view an item that is not in his/her Learning Plan, the admin must add the item to a catalog. An item may reside in multiple catalogs and have a different price associated in each. In order for a user to self-assign an item or self-register in a scheduled offering of an item, the item must reside in a catalog.

Subject Area Tab: Users have the ability to browse catalog/s by subject area. An item can be associated with one or more subject areas.

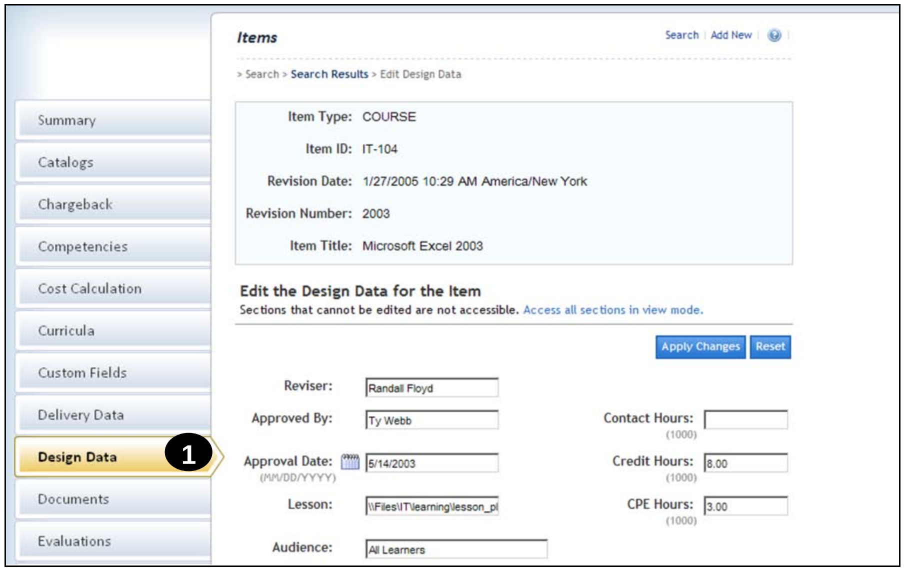
Notification Tab: Users have the ability to change the message within the notification associated with an item and to attach additional documents to the notification such as pre-reading or work.

Task A.	**Identify Item Classification and Review Summary Tab**	
	Verify the **Admin** tab is selected. Navigate to **Learning > Items**, and search for an item to edit.	
1		
2	Select the item **edit icon** ( ).	
3	By default the system opens the item record to the Summary tab. The item classification is auto-assigned and identified on the Summary tab. On the Summary tab, you can assign an item source, domain, delivery method, and assignment type to the item. You can also view and maintain a description of the item, and assign a create date. ***Note:*** *Select the* ***Help*** *link at the top of the page for additional information on the Summary tab.*	

Task B. Configure Item: Design Data Tab

1 Select the **Design Data** tab.

Use this page to review and revise design information of the selected item including the name of the reviser and approving official or group, default credit values of the item, default initial period, and default retraining interval.

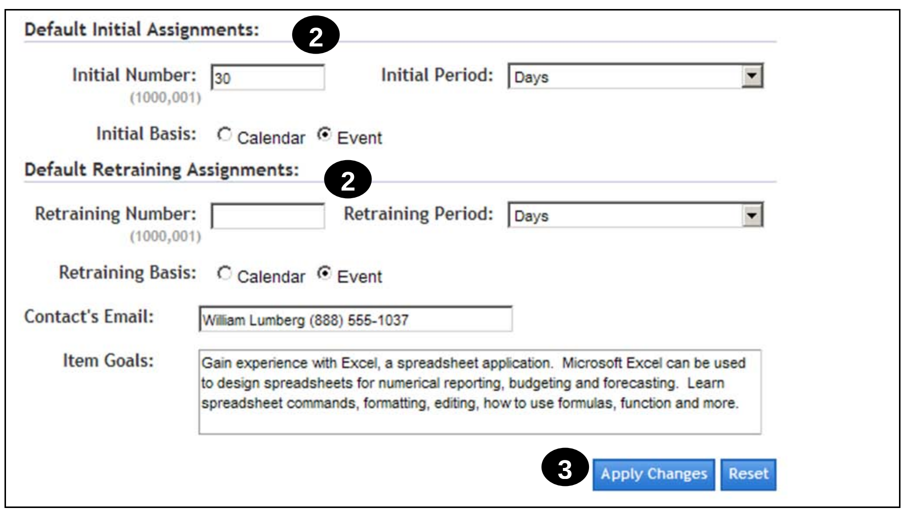


2 Enter the default initial assignments and the default retraining assignments.

Note: *Select the* ***Help*** *link for more information on period-based item assignments.*

3 Select **Apply Changes**.

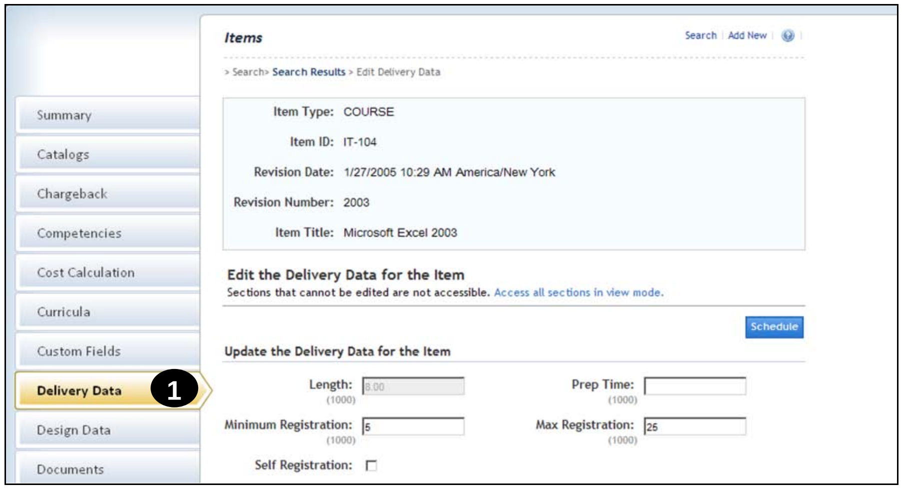
Tip: *Any of the defaults that are defined on this page can be overridden in the individual scheduled offerings or learning events involving this item or any curricula in which the item may be included.*



Task C. Configure Item: Delivery Data Tab

1 Select the **Delivery Data** tab.

On this page you can review and update details about the delivery of the selected item. You can also establish the default scheduling information for the item which includes establishing how the item is scheduled and delivered into segments, its default location type, and what equipment and materials are required for each segment of the item.



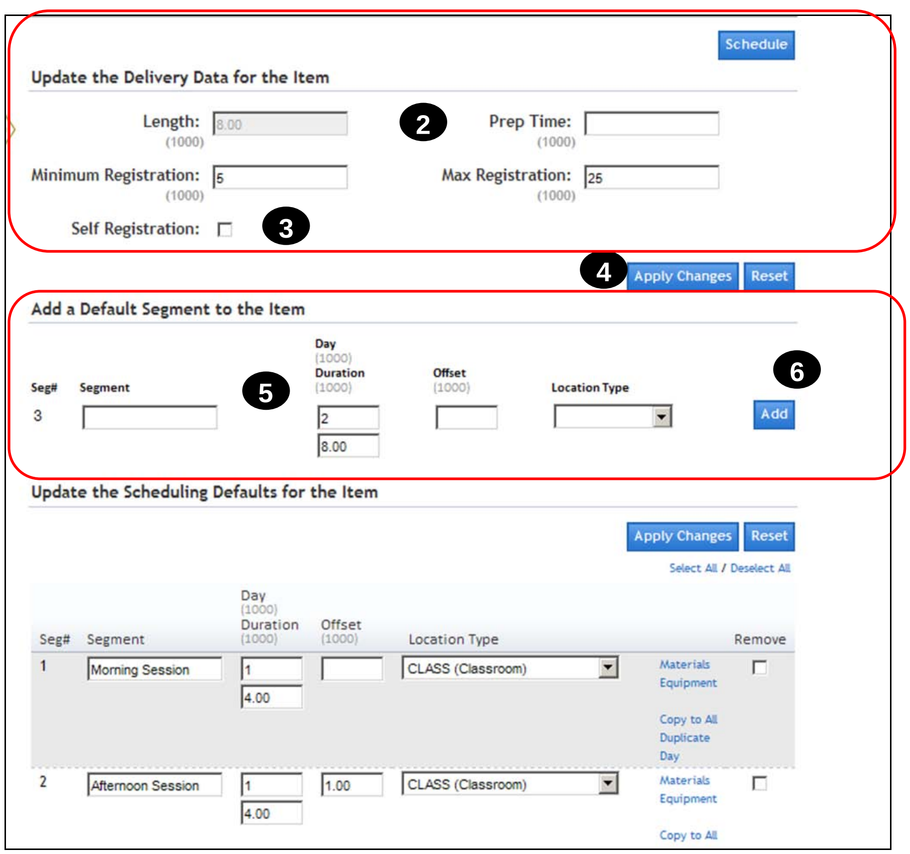
2 Enter the Length and Prep Time (in hours), as well as the Minimum and Maximum Registration.

3 Select the **Self Registration** checkbox if this is an option that should be available to users.

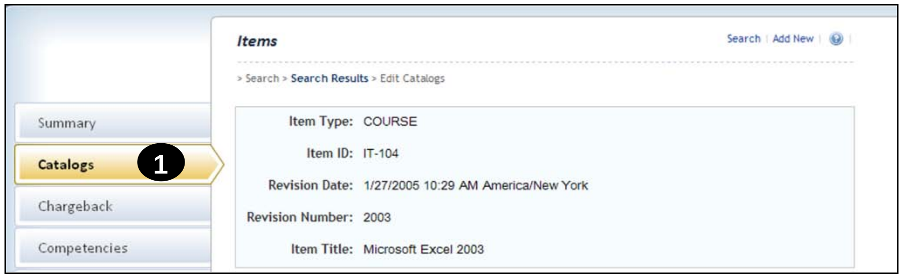
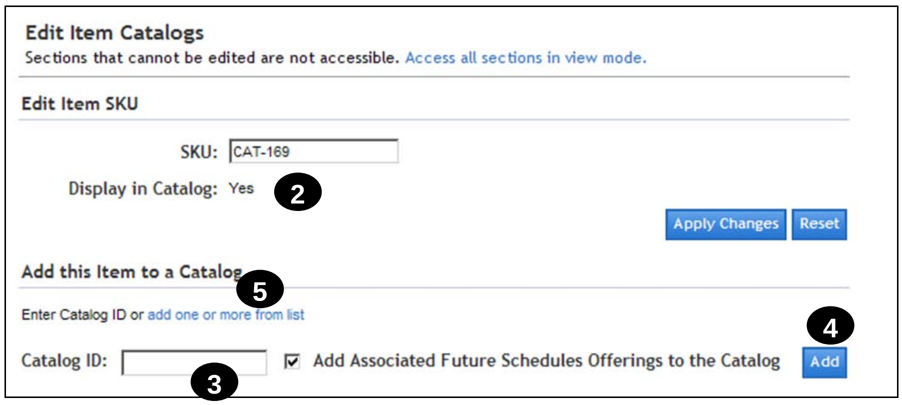
4 Select **Apply Changes**.

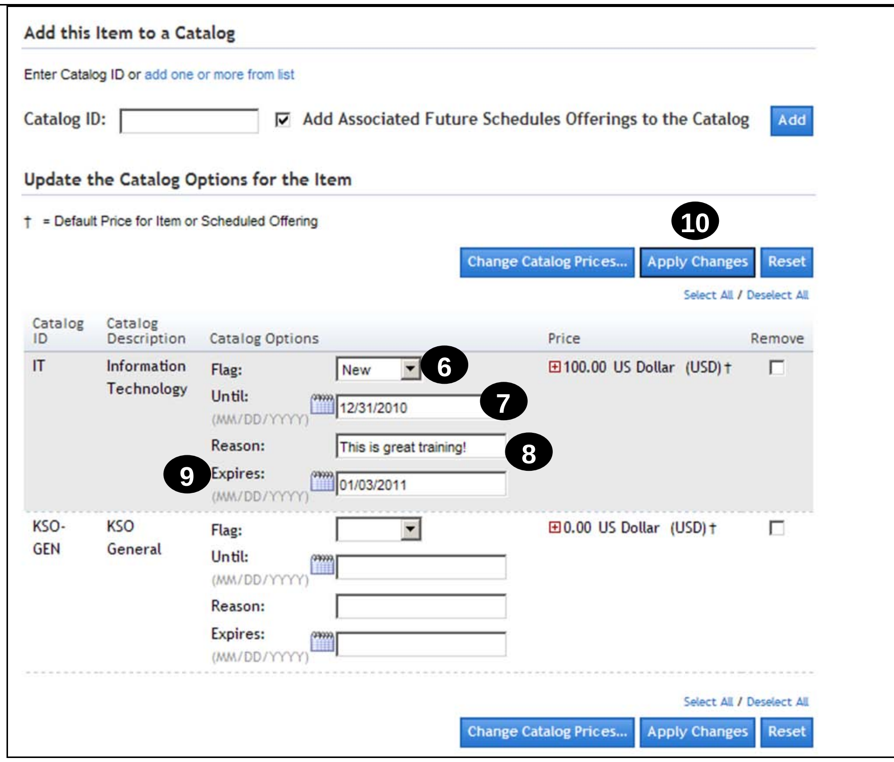
5 If adding a segment to this item, complete the segment fields.

6 Select **Add.**



Note: *To learn more about segments, click the **Help** link.*

	Task D. Configure Item: Catalogs Tab	
1	Select the **Catalogs** tab.	
2 3 4 5	Verify the field *Display in the Catalog* states **Yes**. To add this item to a catalog, enter a Catalog ID exactly. Select **Add**. **or** Select the **add one or more from list** link to search for the desired catalog(s) in which to add the item.	 ***Note:*** *The Add Schedules checkbox should be checked if you also want to add all existing scheduled offerings to this catalog.*
 6 7 8 9 10	Verify that all selected catalogs are displayed. To modify catalog options, select the **Flag** drop-down box and select one of the displayed options. Enter an **Until** date. Enter a **Reason**. Enter an expiration date (if desired). Select **Apply Changes**.	



Notes:

Item Flag: A flag that appears with the item in the catalog.

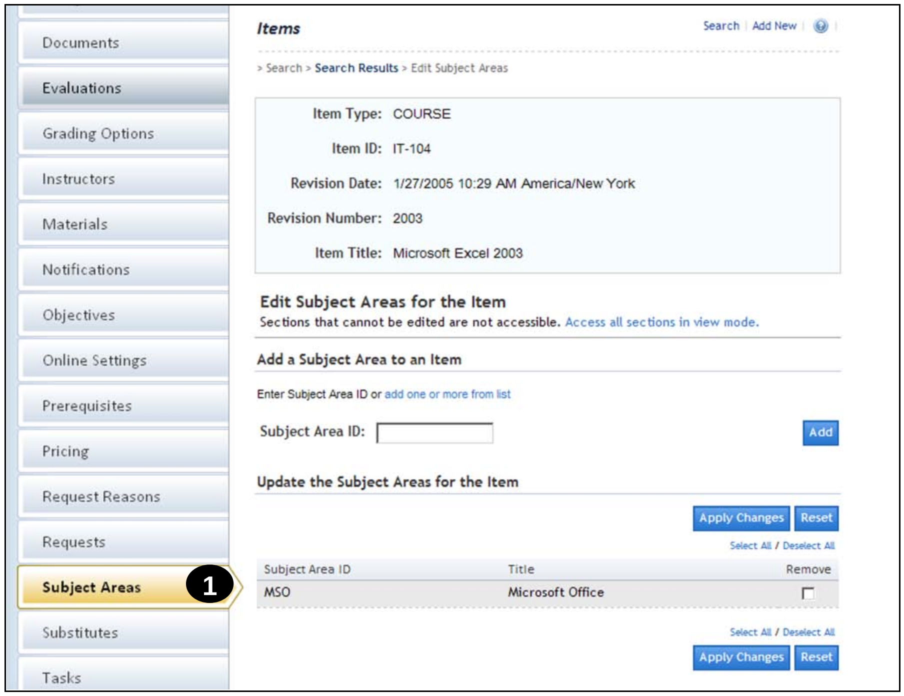
Until: The date that the flag no longer appears with the item in the catalog.

Reason: What the user sees for why they should be interested in this item when viewed on their home page or in the catalog.

Expires: The date at which the item is automatically removed from the catalog. It is automatically removed after this date from the catalog by the purged expired catalog APM.

Task E. Configure Item: Subject Areas Tab

1 Select the **Subject Areas** tab.

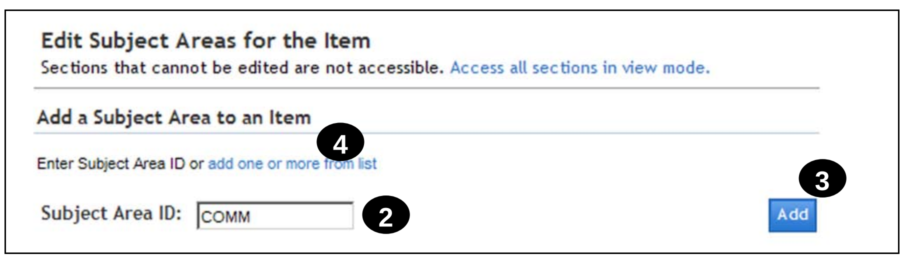


2 To add a subject area to this item, enter a Subject Area ID exactly.

3 Select **Add**.

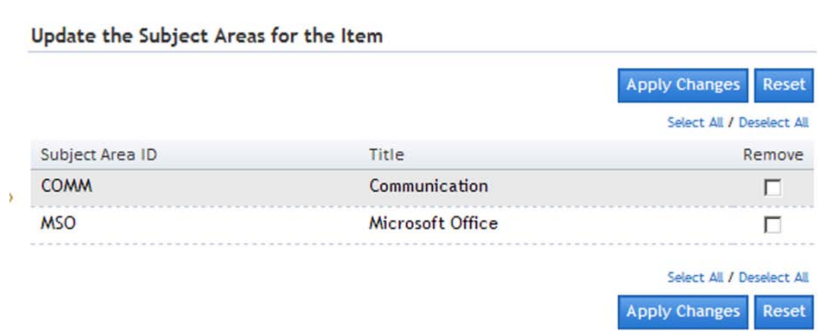
or

4 Select the **add one or more from list** link to search for the desired subject area(s).



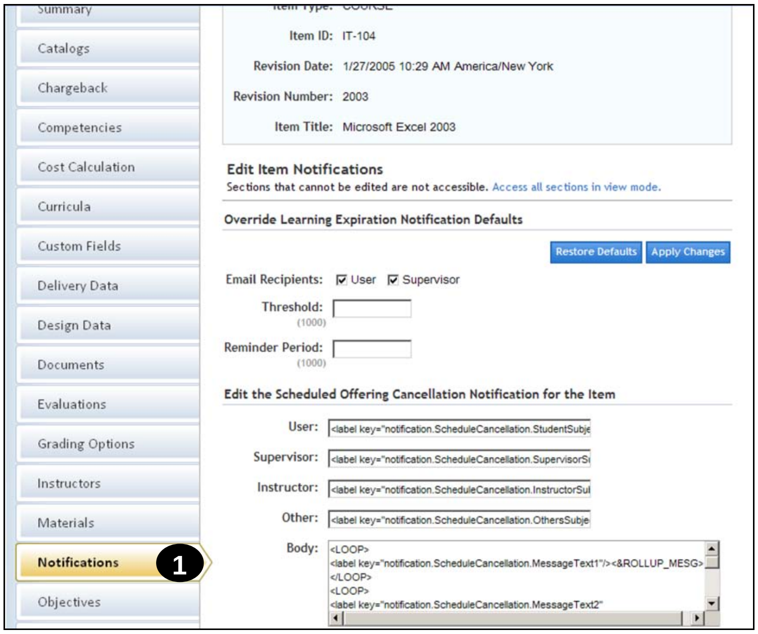
Note: *User can search for items based on subject area.*

Verify the subject areas added appear on the screen.

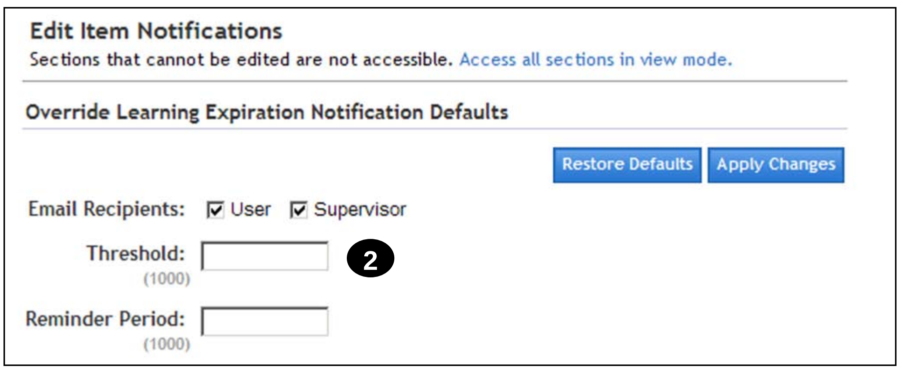


Task F. Configure Item: Notifications Tab

1 Select the **Notifications** tab.



2 In the section *Override Learning Expiration Notification Defaults*, select the email recipients, threshold, and reminder period.

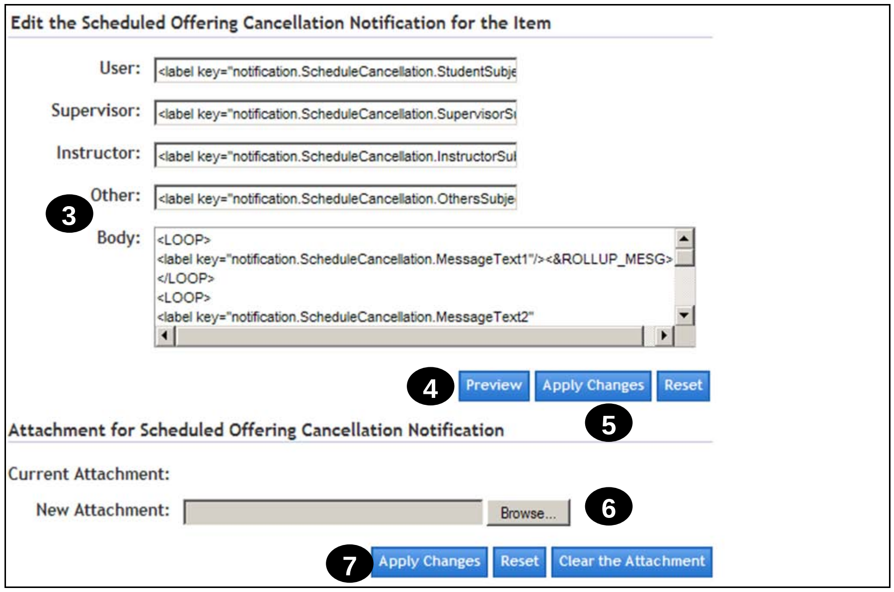


***Note:** After you add a new item, you can change these default values and selections. When the automatic process executes, the system uses the values and settings of the item.*

This page allows you to review and change the content of notifications sent to users, instructors, supervisors, and others (specified in the Contacts tab) regarding this item.

The following notifications are available:

- Scheduled Offering Cancellation
- Registration
- Withdraw
- Waitlist
- Waitlist Removal
- Pending



Note: *For examples about the use of Notification Template and building messages using syntax tags, click the **Help** link.*

3. Make necessary edits to the notification subject line and body.
4. Select **Preview** to view a sample of the notification.
5. Select **Apply Changes**.
6. To add an attachment, select **Browse…** to search for and add a file.
7. Select **Apply Changes** once the correct path to the attachment displays.