

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.

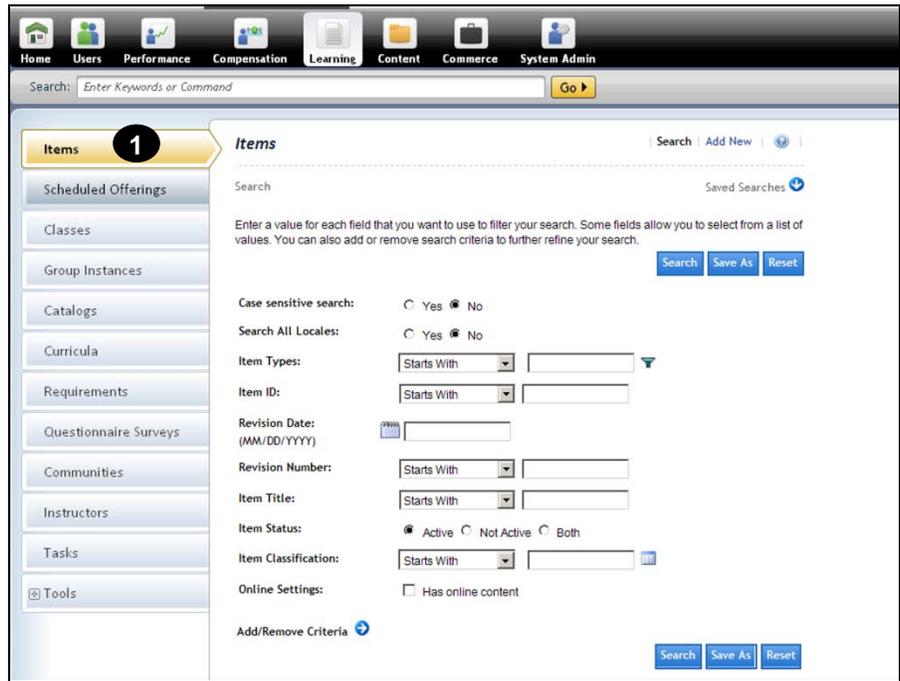
Subject Area Tab: Users have the ability to browse catalog/s by subject area. An item can be associated with one or more subject areas.

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.

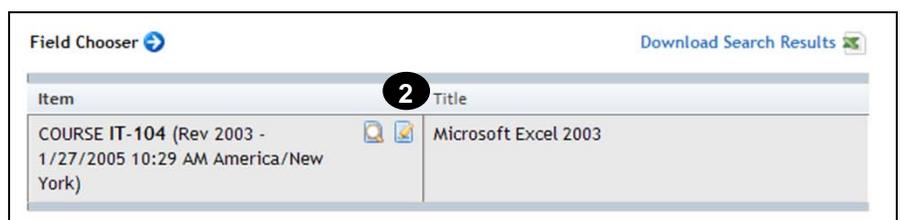
Task A. Identify Item Classification and Review Summary Tab

1 Verify the Admin tab is selected.

1 Navigate to **Learning > Items**, and search for an item to edit.



2 Select the item edit icon (🔗).

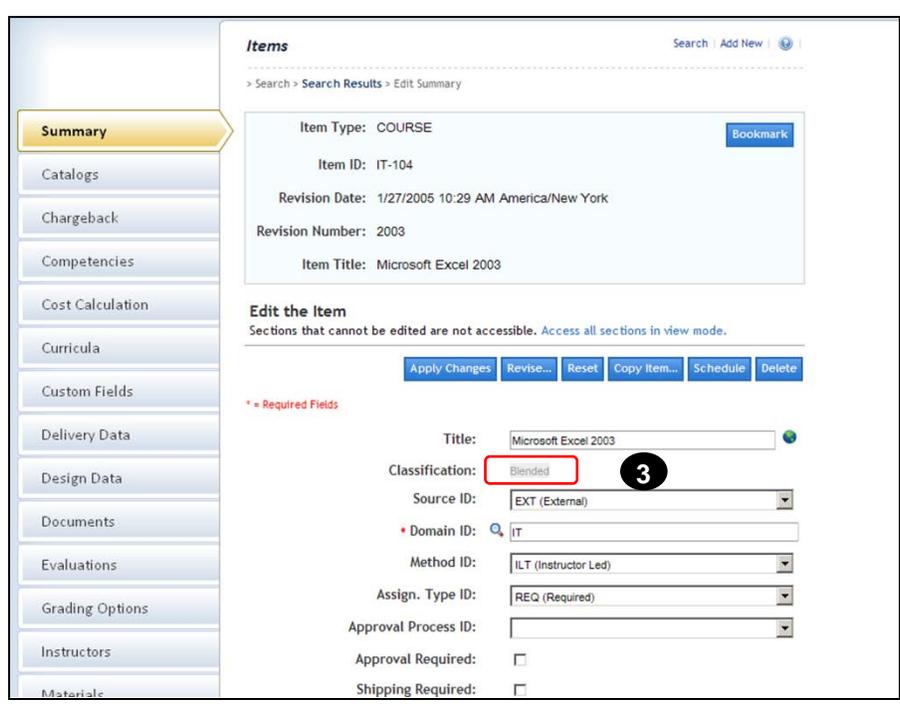


By default the system opens the item record to the Summary tab.

3 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.

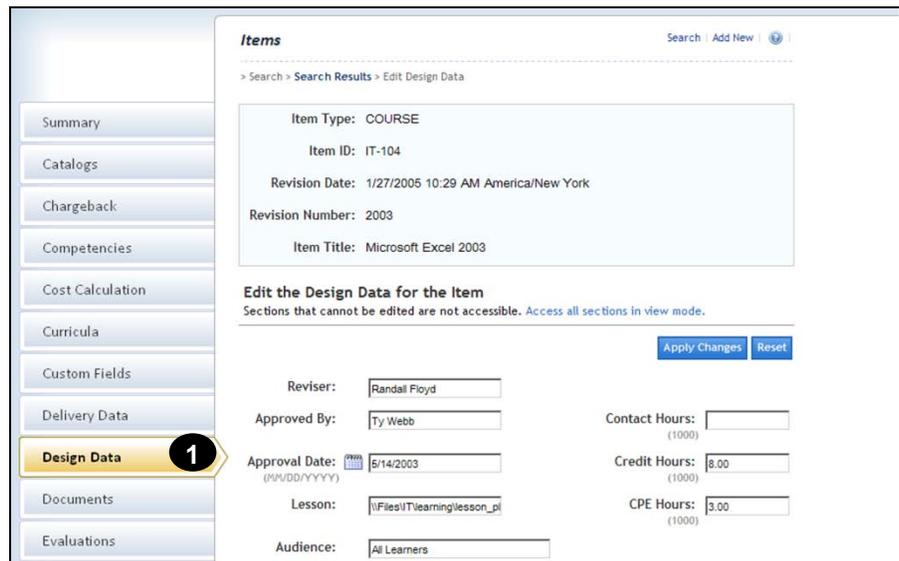
Note: Select the Help link at the top of the page for additional information on the Summary tab.



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.



Items Search | Add New | 

> Search > Search Results > Edit Design Data

Item Type: COURSE
Item ID: IT-104
Revision Date: 1/27/2005 10:29 AM America/New York
Revision Number: 2003
Item Title: Microsoft Excel 2003

Edit the Design Data for the Item
Sections that cannot be edited are not accessible. Access all sections in view mode.

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

Reviser:
Approved By:
Approval Date:
Lesson:
Audience:

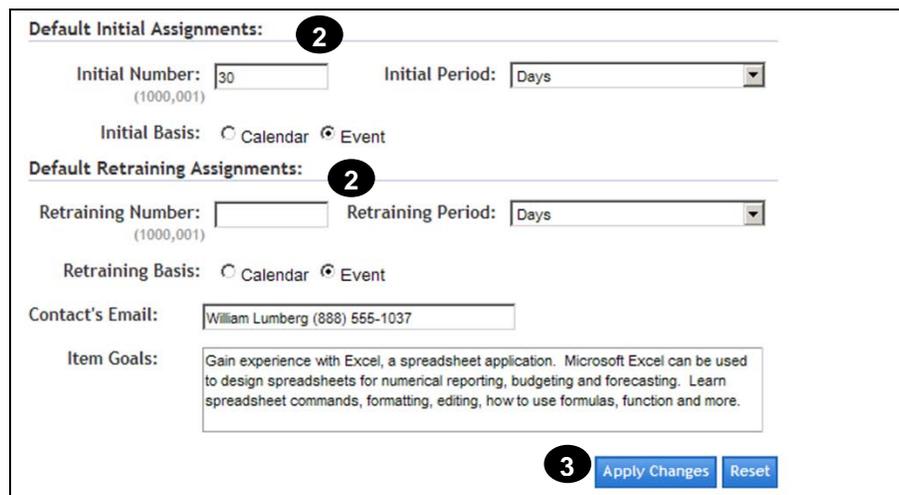
Contact Hours:
Credit Hours:
CPE Hours:

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.



Default Initial Assignments:

Initial Number: Initial Period:
(1000,001)

Initial Basis: Calendar Event

Default Retraining Assignments:

Retraining Number: Retraining Period:
(1000,001)

Retraining Basis: Calendar Event

Contact's Email:

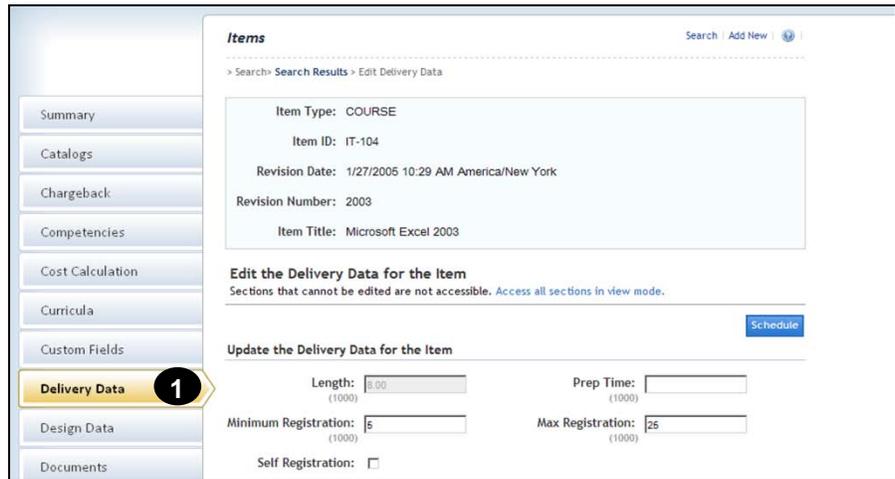
Item Goals:

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

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.



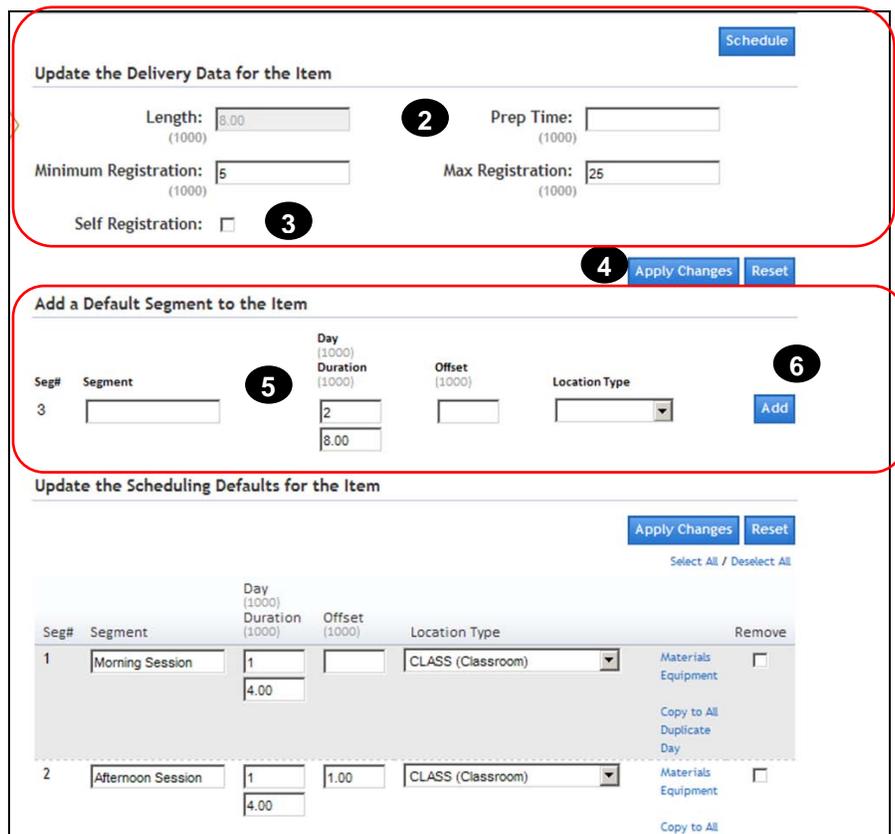
2 Enter the Length and Prep Time (in hours), as well as the Minimum and Maximum Registration.

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

4 Select **Apply Changes**.

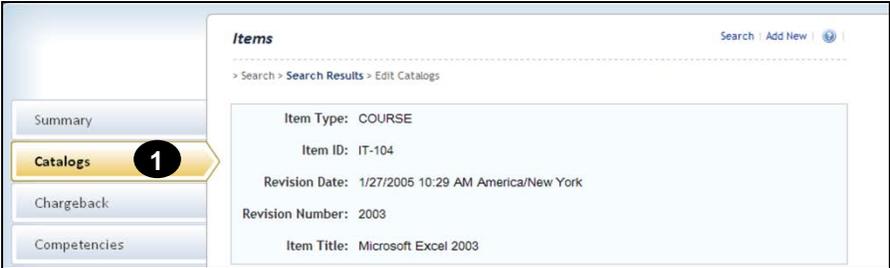
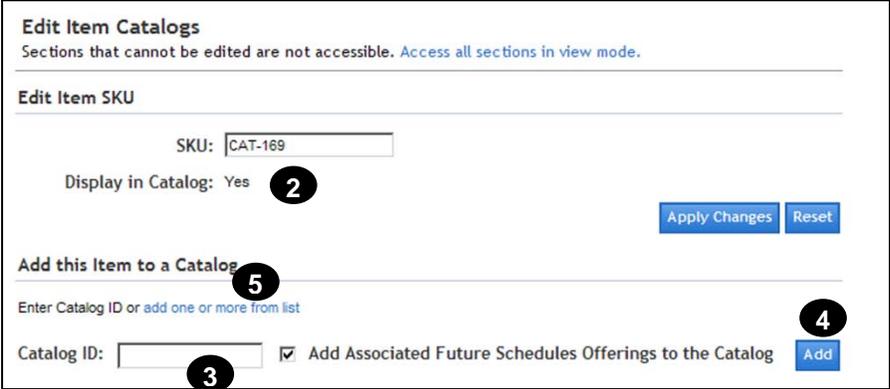
5 If adding a segment to this item, complete the segment fields.

6 Select **Add**.



Note: To learn more about segments, click the [Help](#) link.

Task D. Configure Item: Catalogs Tab

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

Add this Item to a Catalog

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

Catalog ID: Add Associated Future Schedules Offerings to the Catalog

Update the Catalog Options for the Item

† = Default Price for Item or Scheduled Offering

10

[Select All / Deselect All](#)

Catalog ID	Catalog Description	Catalog Options	Price	Remove
IT	Information Technology	Flag: <input type="text" value="New"/> 6 Until: <input type="text" value="12/31/2010"/> 7 Reason: <input type="text" value="This is great training!"/> 8 Expires: <input type="text" value="01/03/2011"/> 9	100.00 US Dollar (USD) †	<input type="checkbox"/>
KSO-GEN	KSO General	Flag: <input type="text"/> Until: <input type="text"/> Reason: <input type="text"/> Expires: <input type="text"/>	0.00 US Dollar (USD) †	<input type="checkbox"/>

[Select All / Deselect All](#)

Notes:

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

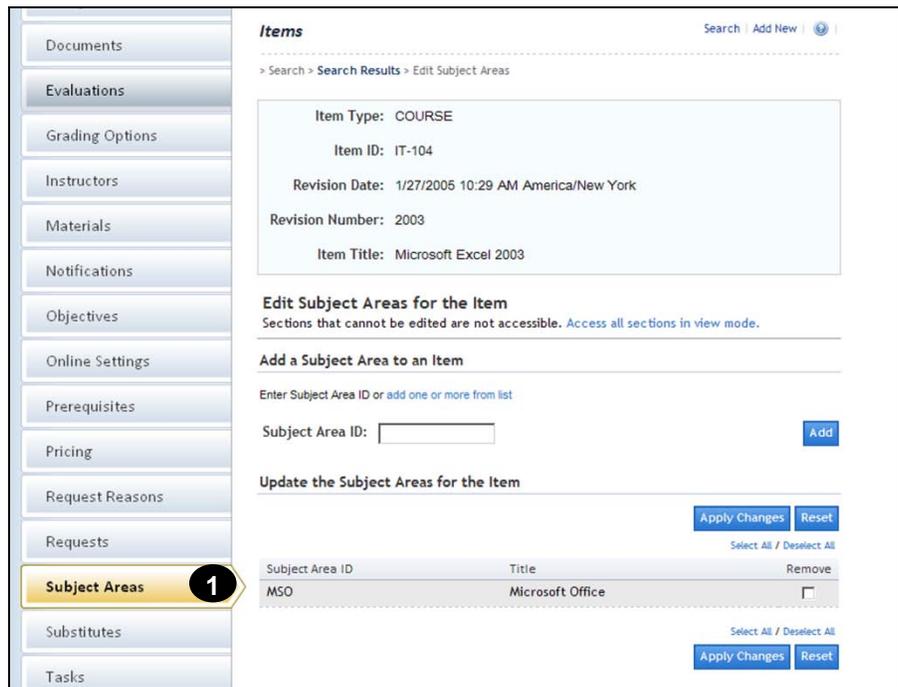
Until: The date that the flag no longer appears with the item in the catalog.

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.



Items Search | Add New | 

> Search > Search Results > Edit Subject Areas

Item Type: COURSE
Item ID: IT-104
Revision Date: 1/27/2005 10:29 AM America/New York
Revision Number: 2003
Item Title: Microsoft Excel 2003

Edit Subject Areas for the Item
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

Add a Subject Area to an Item
Enter Subject Area ID or [add one or more from list](#)

Subject Area ID: **Add**

Update the Subject Areas for the Item

Subject Area ID	Title	Remove
MSO	Microsoft Office	<input checked="" type="checkbox"/>

Select All / Deselect All
Apply Changes **Reset**

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).



Edit Subject Areas for the Item
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

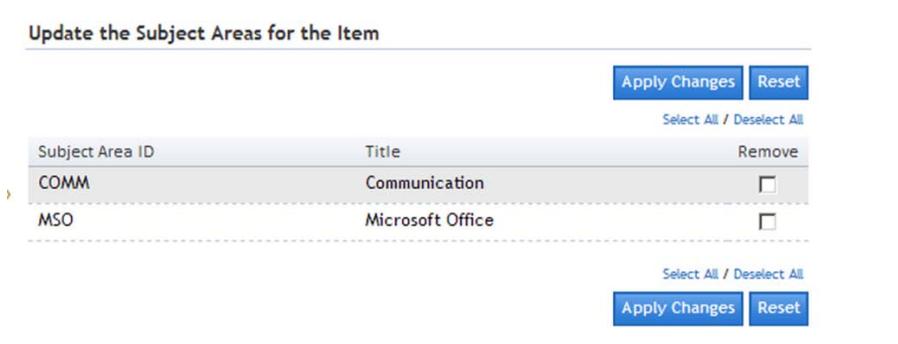
Add a Subject Area to an Item

Enter Subject Area ID or [add one or more from list](#)

Subject Area ID: **Add**

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

Verify the subject areas added appear on the screen.



Update the Subject Areas for the Item

Apply Changes **Reset**

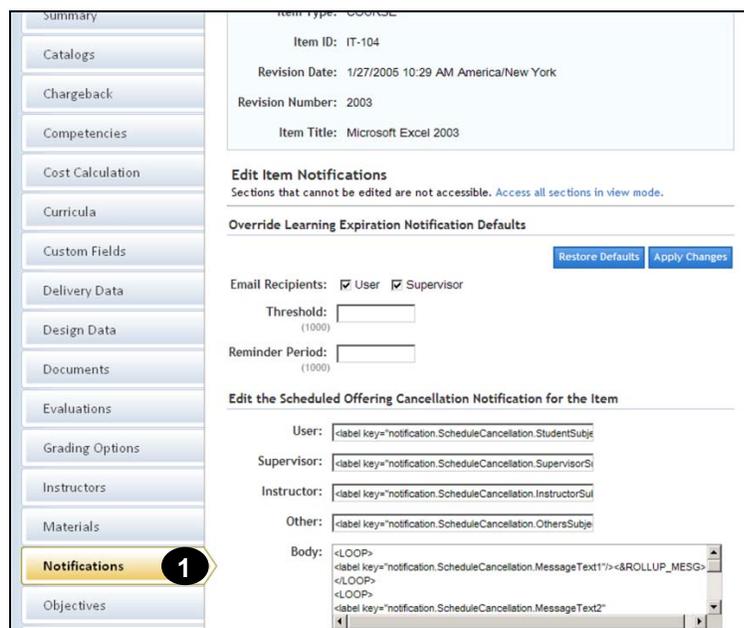
Select All / Deselect All

Subject Area ID	Title	Remove
COMM	Communication	<input type="checkbox"/>
MSO	Microsoft Office	<input type="checkbox"/>

Select All / Deselect All
Apply Changes **Reset**

Task F. Configure Item: Notifications Tab

1 Select the Notifications tab.



Summary

Catalogs

Chargeback

Competencies

Cost Calculation

Curricula

Custom Fields

Delivery Data

Design Data

Documents

Evaluations

Grading Options

Instructors

Materials

Notifications 1

Objectives

Item Type: COURSE

Item ID: IT-104

Revision Date: 1/27/2006 10:29 AM America/New York

Revision Number: 2003

Item Title: Microsoft Excel 2003

Edit Item Notifications
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

Override Learning Expiration Notification Defaults

[Restore Defaults](#) [Apply Changes](#)

Email Recipients: User Supervisor

Threshold:
(1000)

Reminder Period:
(1000)

Edit the Scheduled Offering Cancellation Notification for the Item

User:

Supervisor:

Instructor:

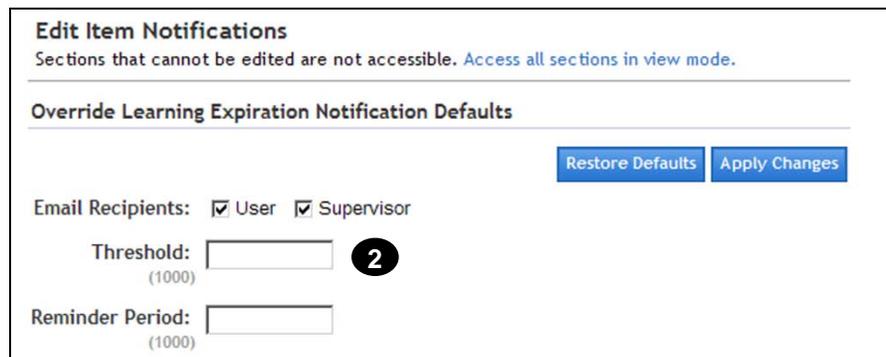
Other:

Body:

```
<LOOP>
<label key='notification.ScheduleCancellation.MessageText1'><&ROLLUP_MESG>
<LOOP>
<LOOP>
<label key='notification.ScheduleCancellation.MessageText2'

```

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



Edit Item Notifications
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

Override Learning Expiration Notification Defaults

[Restore Defaults](#) [Apply Changes](#)

Email Recipients: User Supervisor

Threshold: **2**
(1000)

Reminder Period:
(1000)

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

- 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.

Edit the Scheduled Offering Cancellation Notification for the Item

User:

Supervisor:

Instructor:

3 Other:

Body:

4 **Preview** **Apply Changes** **Reset**

Attachment for Scheduled Offering Cancellation Notification

5

Current Attachment:

New Attachment: **Browse...** 6

7 **Apply Changes** **Reset** **Clear the Attachment**

Note: For examples about the use of Notification Template and building messages using syntax tags, click the [Help](#) link.