Job Aid: Record Learning - Financial	Course: Learning Needs Management Lab 17: Record a Learning Event for Item(s) Course: Scheduling Management Lab 9: Record a Learning Event for a Scheduled Offering

Prerequisite Courses

- Introduction to Plateau Learning Administration
- Learning Needs Management
- Scheduling Management

Description

The purpose of this job aid is to guide administrators through the step-by-step process of using the Learning Event Recorder. Related terminology is provided.

Tasks

A. Use Learning Event Recorder to Record Completion of Item – Financial
B. Use Learning Event Recorder to Record Attendance at External Event
C. Use Learning Event Recorder to Record Completion of Scheduled Offering
D. View User Learning History tab
E. Edit Learning Event Using Learning Event Editor

Terminology:

Learning Event: A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- A record of the attendance or completion of any external event that is considered important enough to document but not related directly to learning needs

Types of Learning

- **Item Based Events:** Items are the primary events found in the list of learning events for users. Learning events for items include those created as scheduled offerings and those with online content where the system records the learning event when the user completes the content. All items may have a learning event recorded against them for any user, even if the item was not a part of his/her Learning Plan.
- **External Events:** A learning activity outside of the organization, such as a college course or a seminar, for which there is no Item record in Plateau Learning, may be recorded in a user's Learning History.
- **Scheduled Offering:** An item or learning event with a scheduled date and time.

Task A. Use Learning Event Recorder to Record Completion of Item - Financial

Verify the **Admin** tab is selected.

1 Navigate to **Users > Tools > Record Learning - Financial**.

or

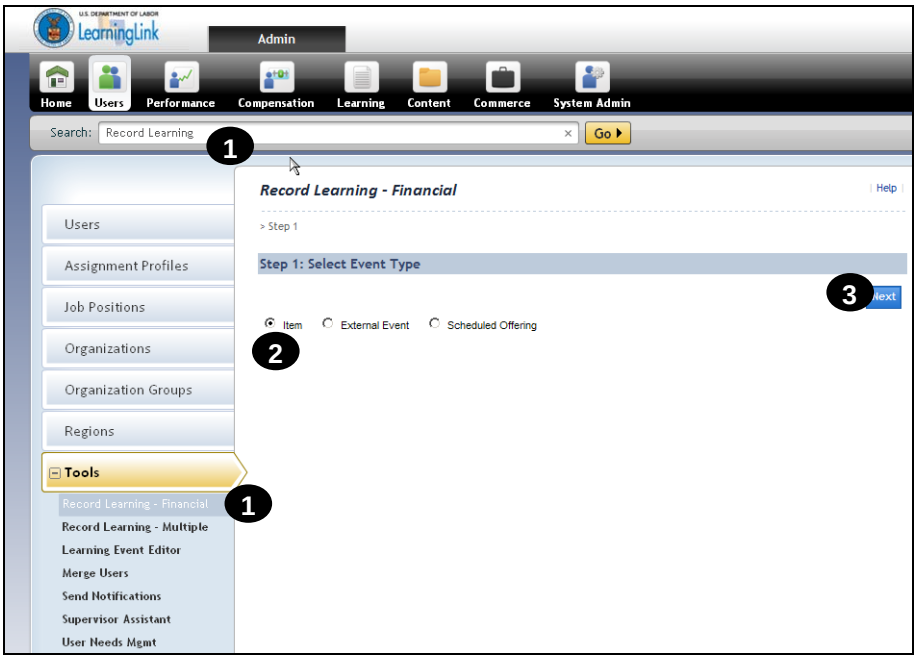
1 Enter "**Record Learning**" in the Search box.

The Record Learning – Financial wizard displays.

Step 1: Select Event Type of the Recording Learning – Financial wizard displays.

2 Select the **Item** option.

3 Select **Next**.



Note: *This option is usually used when an item has not been scheduled or is classified as "Other."*

Note: *Use the* ***Record Learning - Multiple*** *option to record learning history for multiple users for one or more items, scheduled offereings or external events.*

Step 2: Select Item of the Recording Learning – Financial wizard displays.

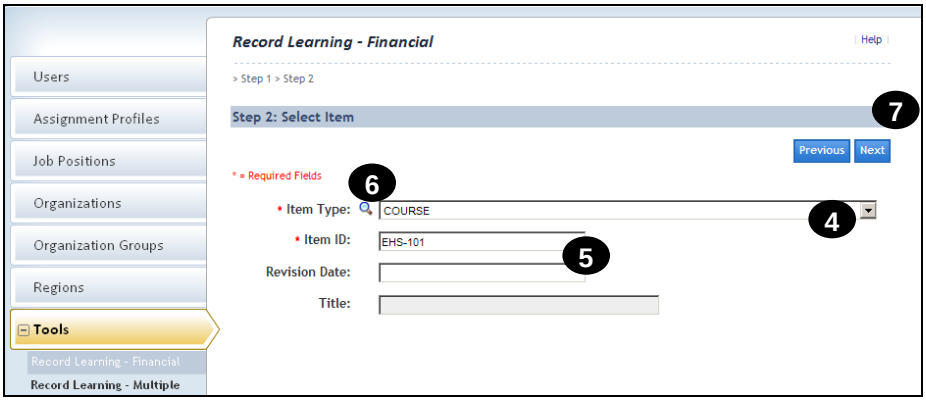
4 Select the item type from the drop-down menu.

5 Enter the Item ID in the textbox exactly.

or

6 Select the **select icon** (🔍) to search for and select an item.

7 Select **Next**.

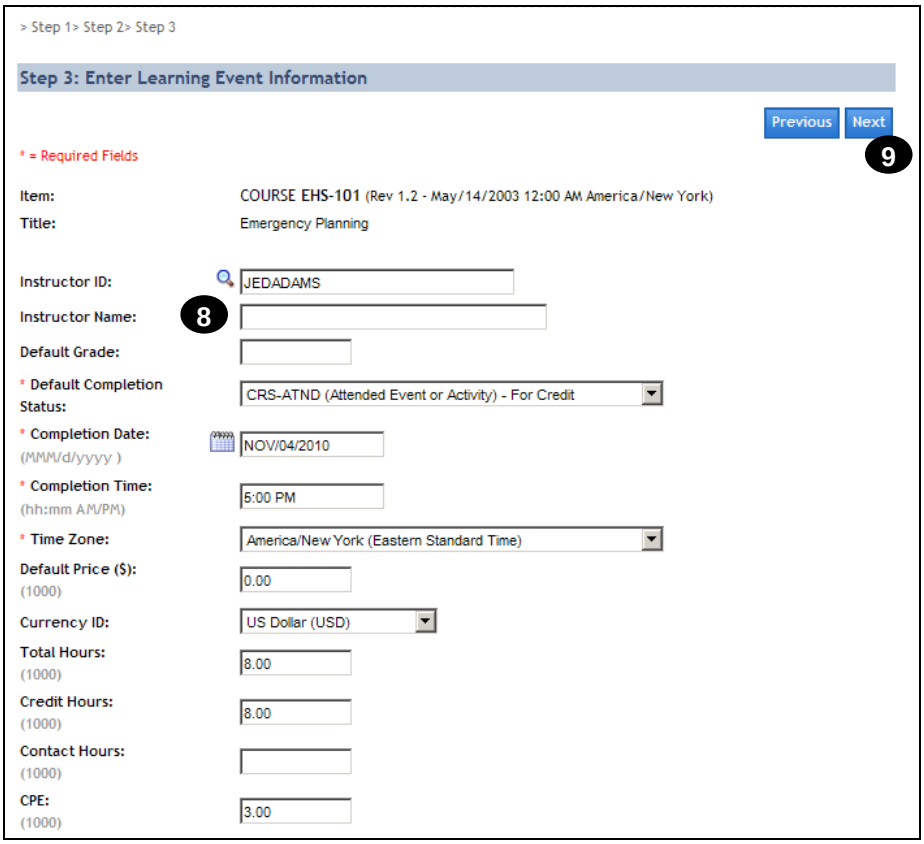


Note: *By selecting to search for an item, all relevant information will be auto-populated into the fields.*

Step 3: Enter Learning Event Information of the Recording Learning – Financial Recorder wizard displays.

8 Fill in all of the required data fields (*).

9 Select **Next**.



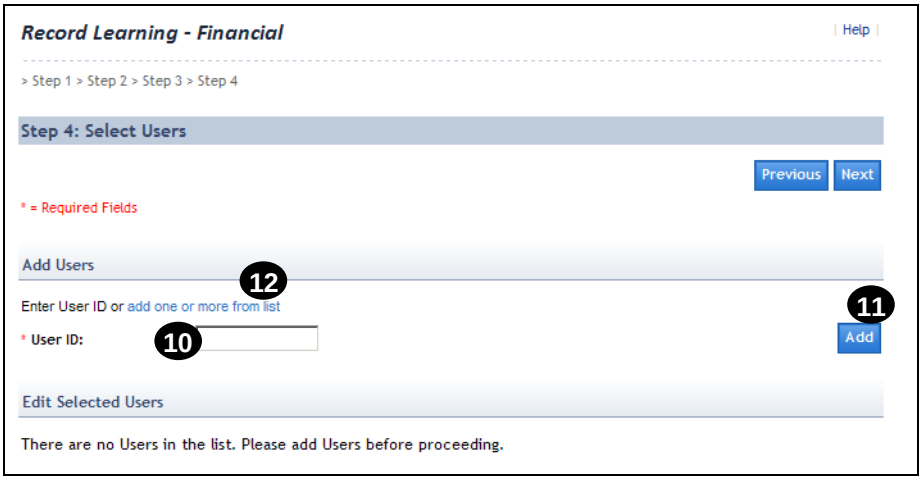
Step 4: Select Users of the Recording Learning – Financial wizard displays.

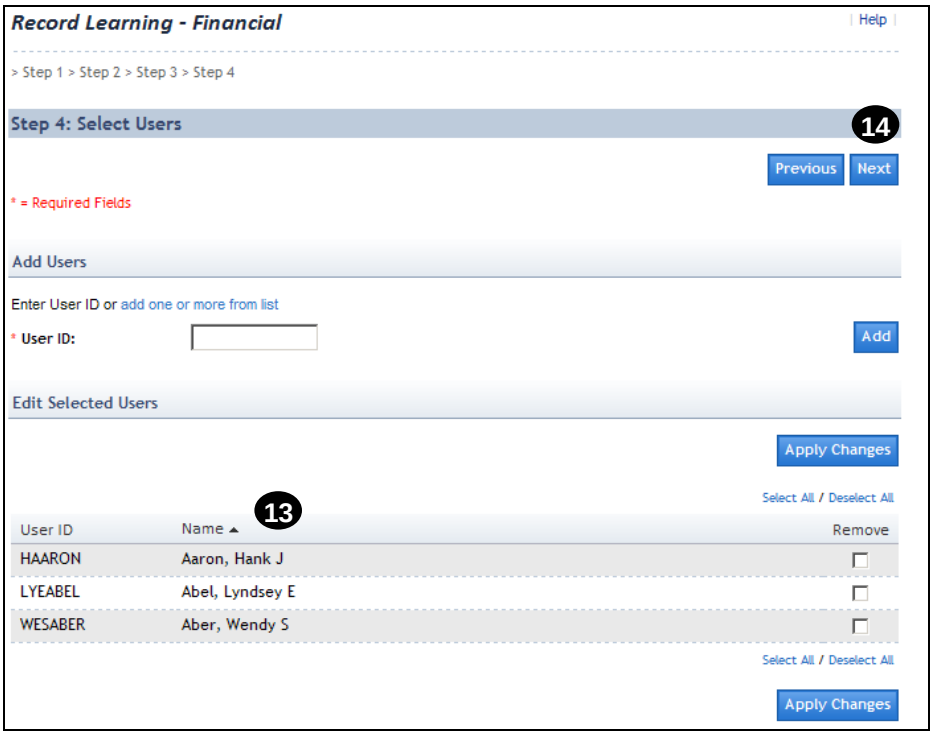
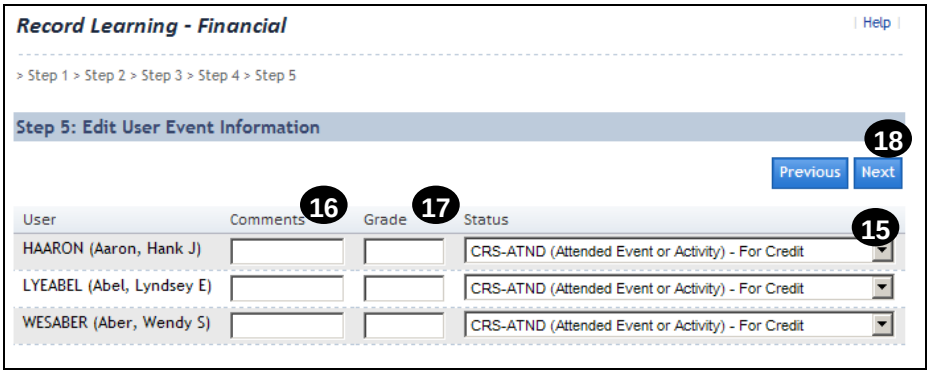
10 Enter a User ID exactly.

11 Select **Add**.

or

12 Select the **add one or more from list** link to search for and select one or more users.



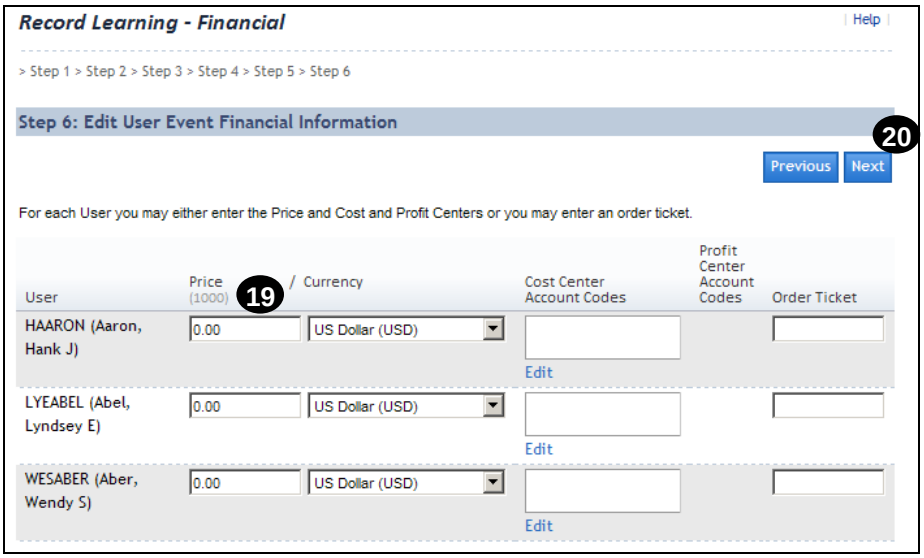
13	Once all users have been added, confirm list.	
14	Select **Next.**	
	Step 5: Edit User Event Information of the Recording Learning – Financial wizard displays. The status and grade selected at *Step 3: Enter Learning Event Information* are applied to all users.	 ***Note:*** *Any comments entered will appear on a Learning History report.*
15	Select an option in the drop-down menu to adjust a user's status.	
16	Enter comments (optional).	
17	Enter or adjust grade (optional).	
18	Select **Next**.	

Step 6: Edit User Event Financial Information of the Recording Learning – Financial wizard displays.

19 Enter any relevant financial information about the learning event.

20 Select **Next**.

Note: *If you enter a price, you must also enter a cost center account code in order to proceed.*

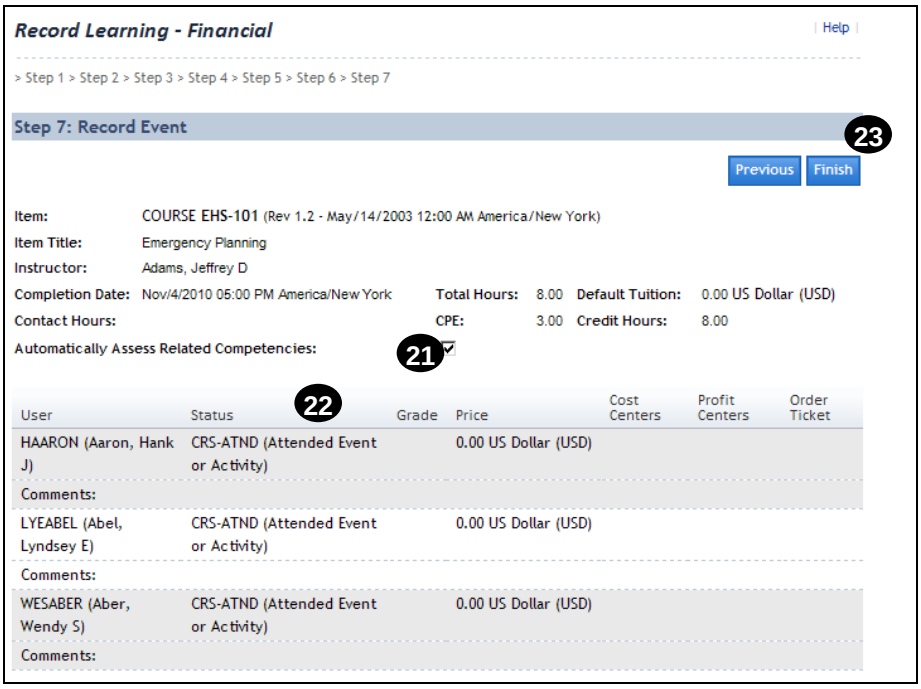


Step 7: Record Event of the Recording Learning – Financial wizard displays.

21 If competencies need to be assessed as a result of recording the learning event, select the **Automatically Assess Related Competencies** checkbox.

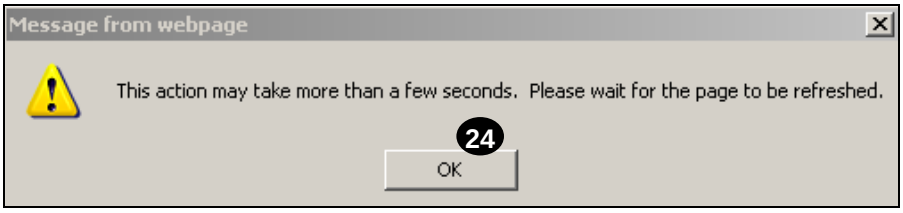
22 Review learning event information.

23 Select **Finish**.



A pop-up may appear requesting that the page refresh before you proceed.

24 Select **OK**.

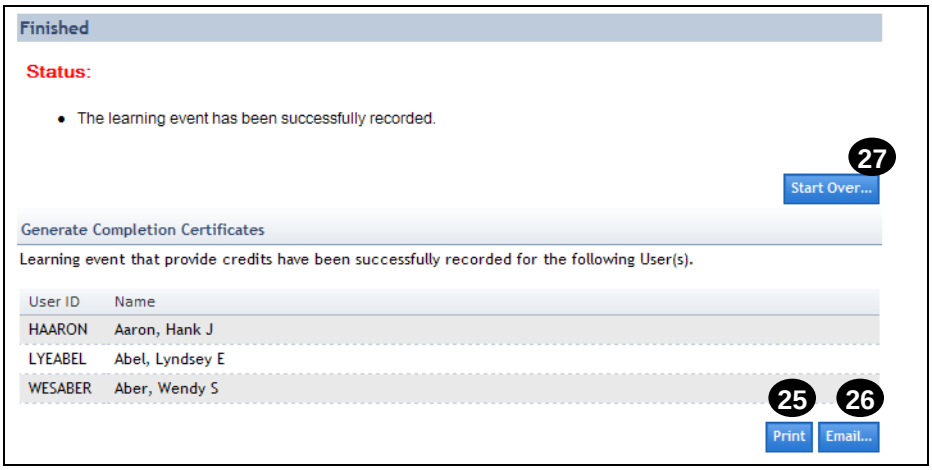


The application provides a status to let you know that the learning event has been recorded successfully.

25 Select **Print** to print a completion certificate report for each user listed.

26 Select **Email…** to email a completion certificate report to each user listed.

27 Select **Start Over…** to begin the Learning Event Recorder process again. This retains all users previously selected.



Note: *The user whose status was changed to 'No Credit' does not appear in the list of users to generate completion certificates.*

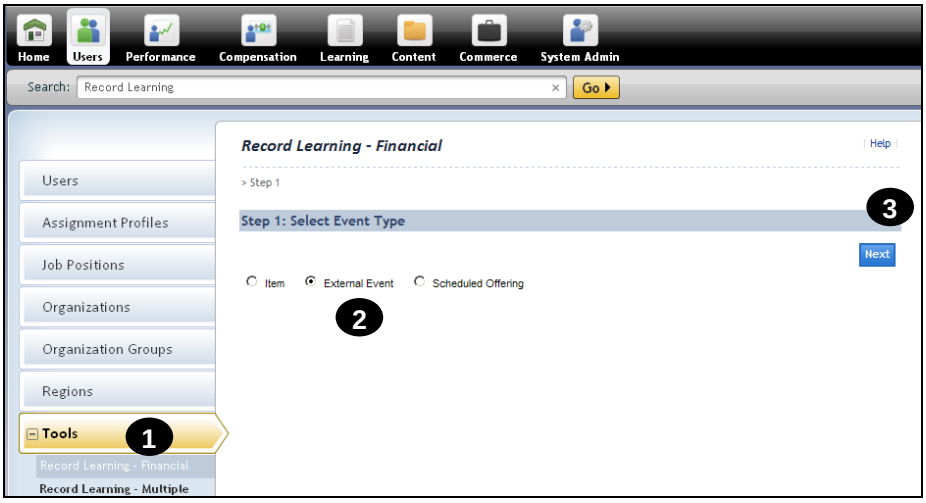
Task B. Use Learning Event Recorder to Record Attendance at External Event

1 Navigate to **Users > Tools > Record Learning - Financial**.

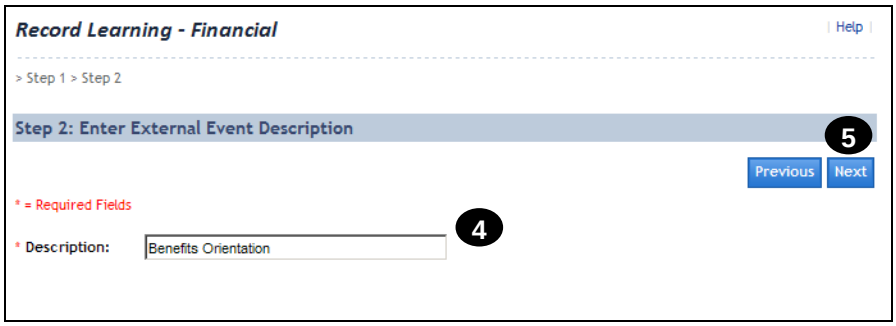
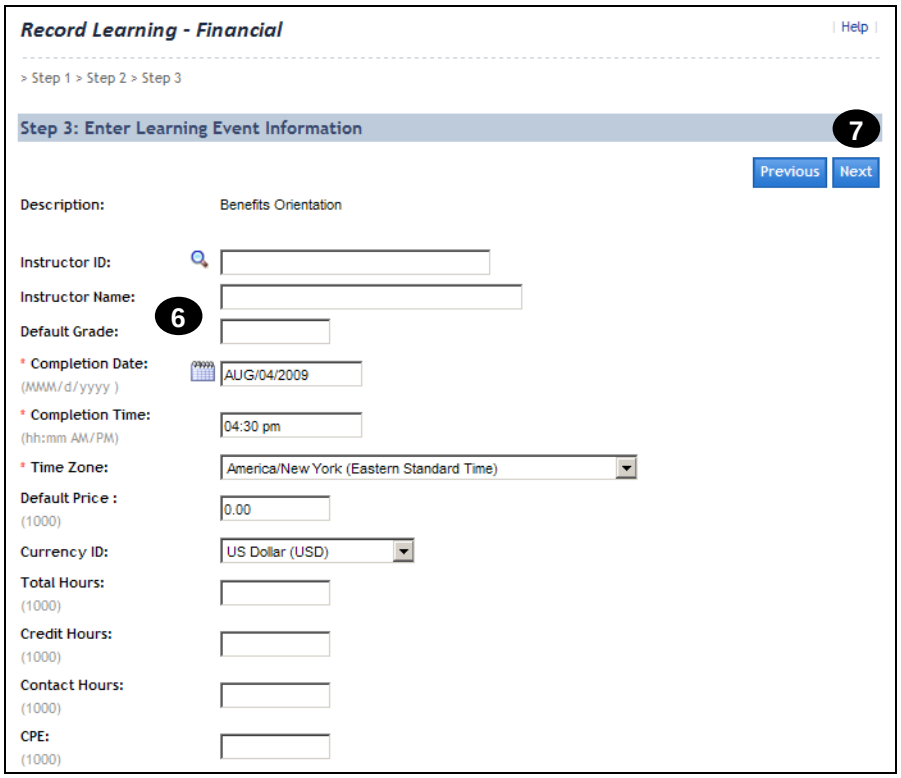
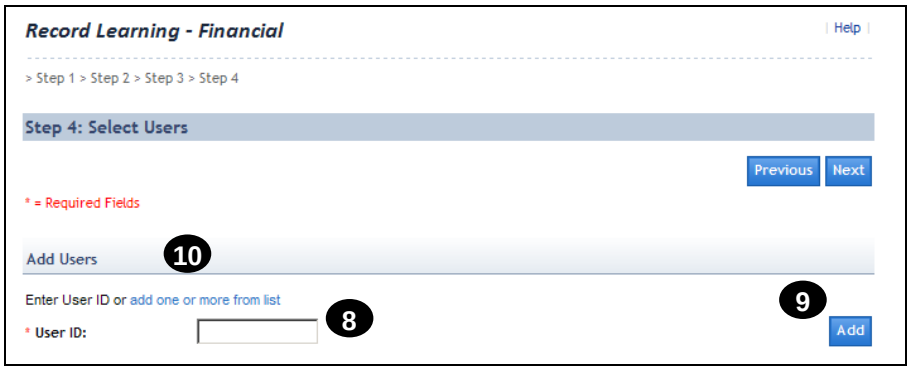
Step 1: Select Event Type of the Record Learning – Financial wizard displays.

2 Select the **External Event** option.

3 Select **Next**.

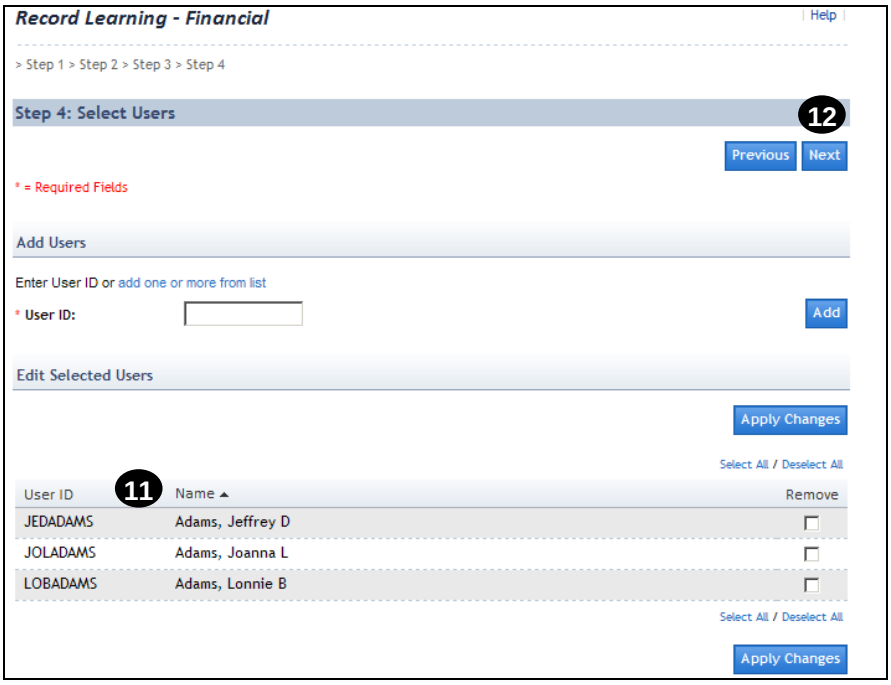


Note: *This option is usually used to record completion or attendance for an event that is not represented as an item in Plateau Learning.*

4 5	*Step 2: Enter External Event Description* of the Recording Learning – Financial wizard displays. Enter a description of the external event. Select **Next**.	
6 7	*Step 3: Enter Learning Event Information* of the Recording Learning – Financial wizard displays. Fill in all of the required data fields (*). Additional information such as total hours, or credit hours, can be entered as well. Select **Next**.	
8 9 10	*Step 4: Select Users* of the Recording Learning – Financial wizard displays. Enter a User ID exactly. Select **Add**. **or** Select the **add one or more from list** link to search for and select one or more users.	

11 Once all users have been added, confirm list.

12 Select **Next.**

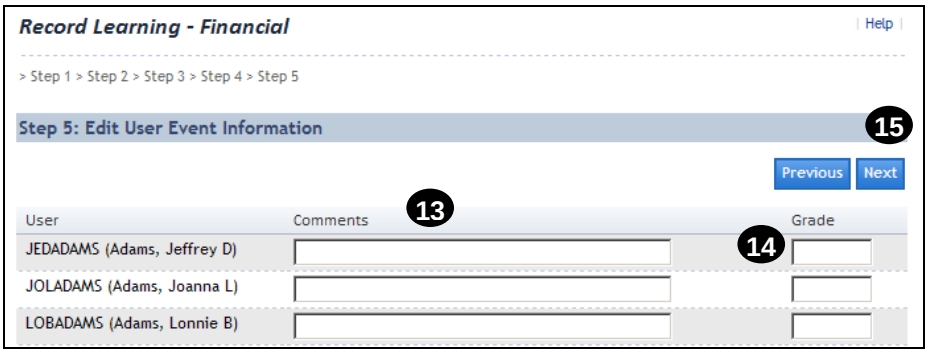


Step 5: Edit User Event Information of the Recording Learning – Financial wizard displays.

13 Enter comments (optional).

14 Enter or adjust grade (optional).

15 Select **Next**.



Note: *Any comments entered will appear on a Learning History report.*

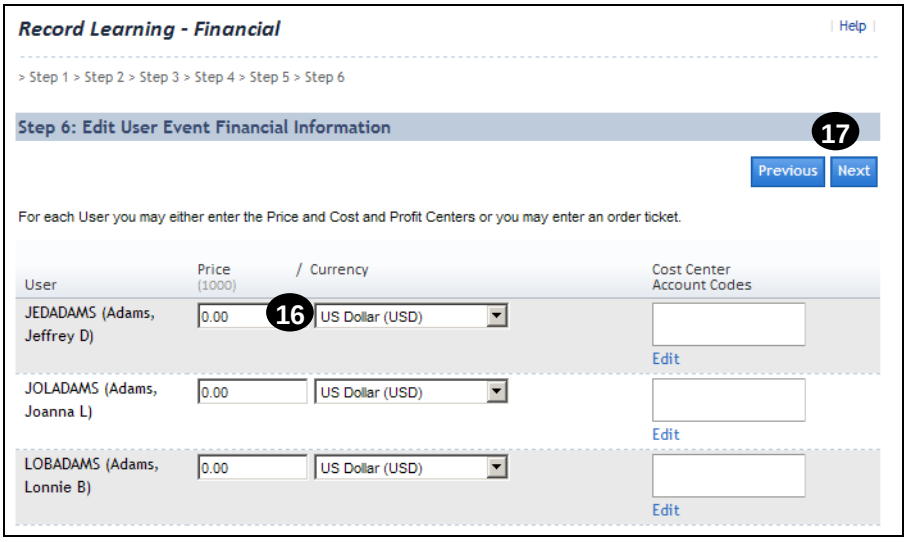
Step 6: Edit User Event Financial Information of Recording Learning – Financial wizard displays.

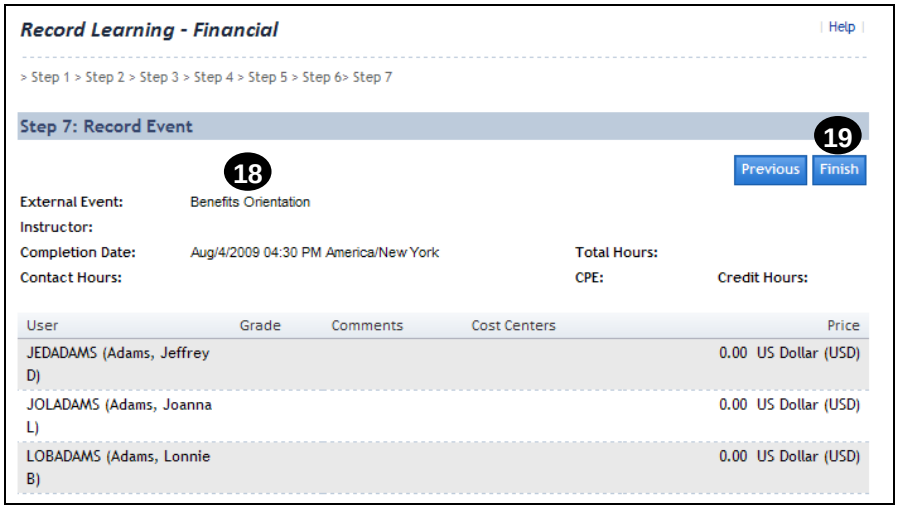
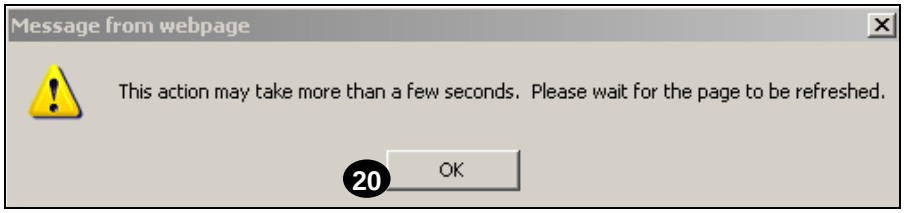
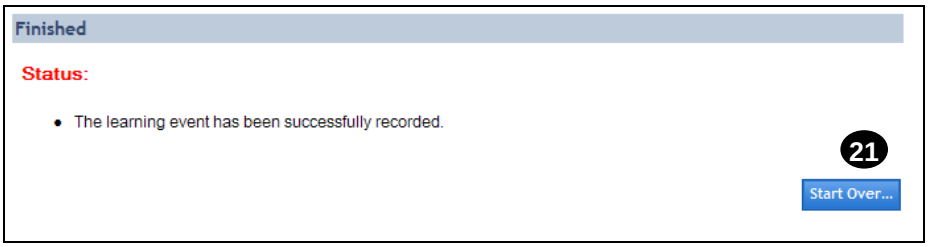
16 Enter any relevant financial information about the learning event.

Note: *If there is no financial information to enter click* ***Next*** *to proceed.*

17 Select **Next**.

Note: *If you enter a price, you also enter a cost center account code to proceed.*



	Step 7: Record Event of the Recording Learning – Financial wizard displays. 18 Review learning event information. 19 Select **Finish**.	
	A pop-up may appear requesting that the page refresh before you proceed. 20 Select **OK**.	
	The application provides a status that the learning event has been recorded successfully. 21 Select **Start Over…** to begin the Record Learning – Financial process again. This retains all users previously selected.	

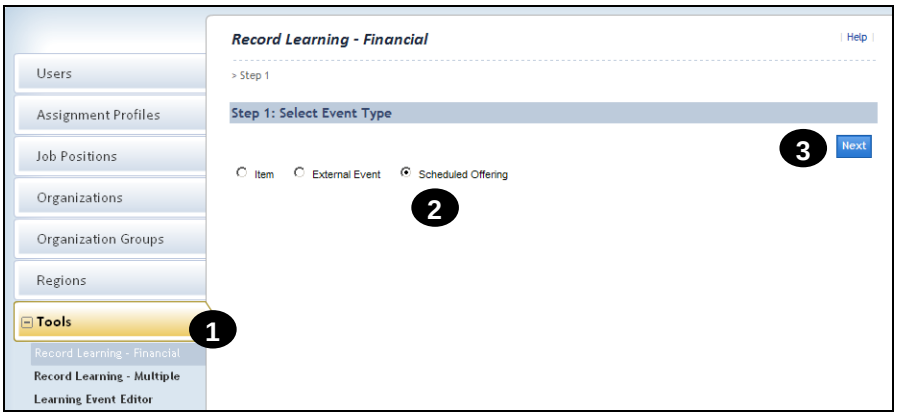
Task C. Use Learning Event Recorder to Record Completion of Scheduled Offering

1. Navigate to **Users > Tools > Record Learning-Financial**.

   Step 1: Select Event Type of the Recording Learning – Financial wizard displays.

2. Select the **Scheduled Offering** option.

3. Select **Next**.



Note: *This option is usually used to record completion or attendance for scheduled event.*

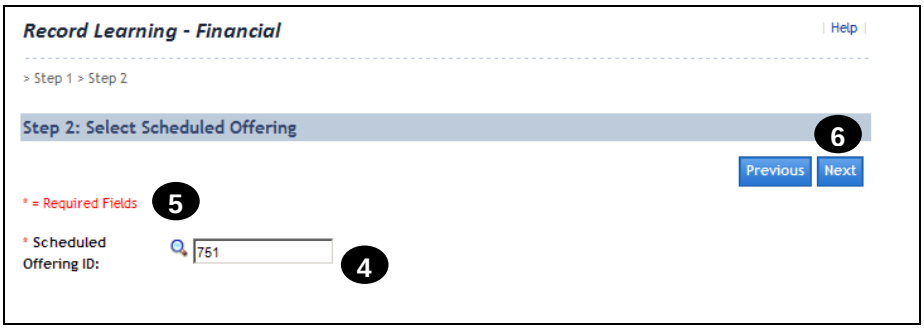
Step 2: Select Scheduled Offering of the Recording Learning – Financial wizard displays.

4. Enter the Scheduled Offering ID in the textbox exactly.

or

5. Select the **select icon** (🔍) to search for scheduled offering.

6. Select **Next**.

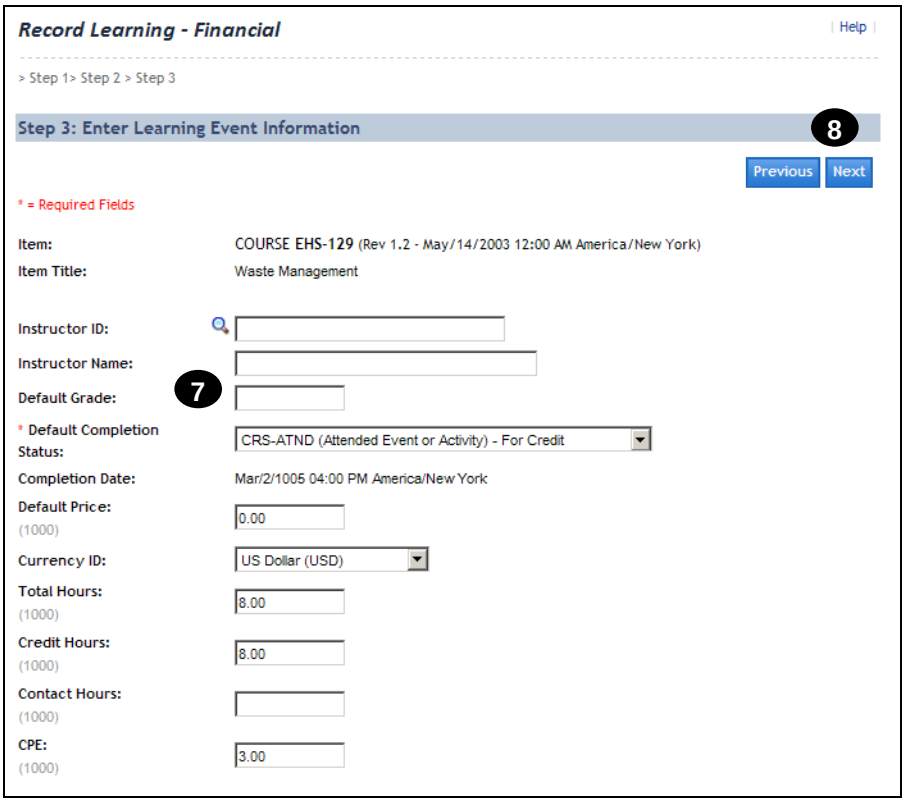


Note: *If you search for a scheduled offering, the search screen defaults to search for all offerings prior to today's date.*

Step 3: Enter Learning Event Information of the Recording Learning – Financial wizard displays.

7 Fill in all of the required data fields (*). Additional information such as total hours, or credit hours, can be entered as well.

8 Select **Next**.



9 Review list of selected users (all users already registered into the offering). Remove/add users from this list.

10 To remove a user, check the **Remove** checkbox.

11 Select **Apply Changes**.

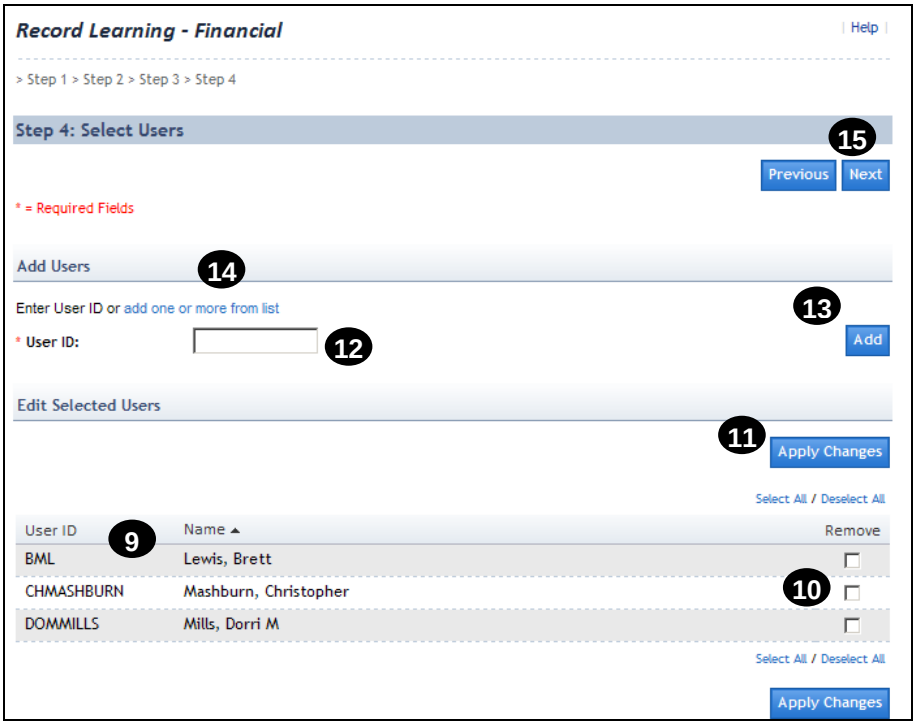
12 To add users, enter a User ID exactly.

13 Select **Add**.

or

14 Select **add one or more from list** to search for and select users.

15 Select **Next.**



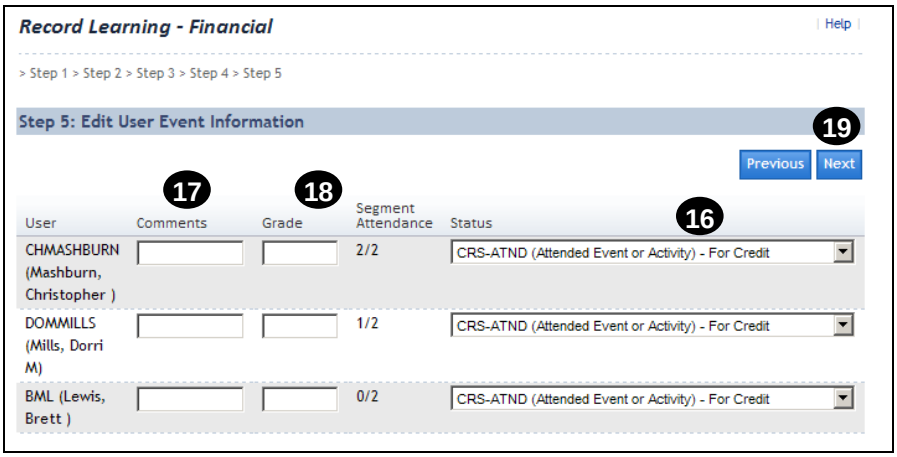
Step 5: Edit User Event Information of the Recording Learning – Financial wizard displays.

16 Select an option in the drop-down menu to adjust a user's status.

17 Enter comments (optional).

18 Enter or adjust grade (optional).

19 Select **Next**.



Note: *Any comments entered will appear on a Learning History report.*

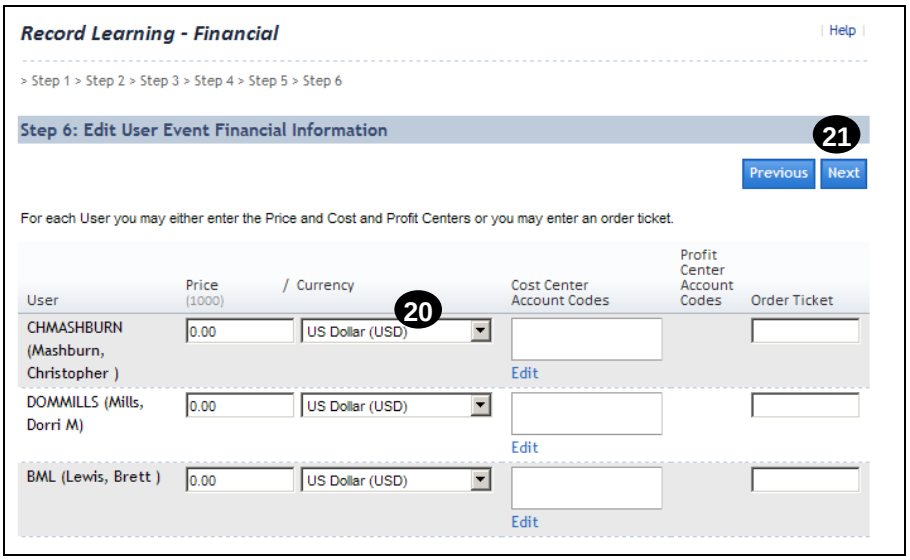
Step 6: Edit User Event Financial Information of the Recording Learning – Financial wizard displays.

20 Enter any relevant financial information about the learning event.

Note: *If there is no financial information to enter click* ***Next*** *to proceed.*

21 Select **Next**.

Note: *If you enter a price, you must also enter a cost center account code in order to proceed.*

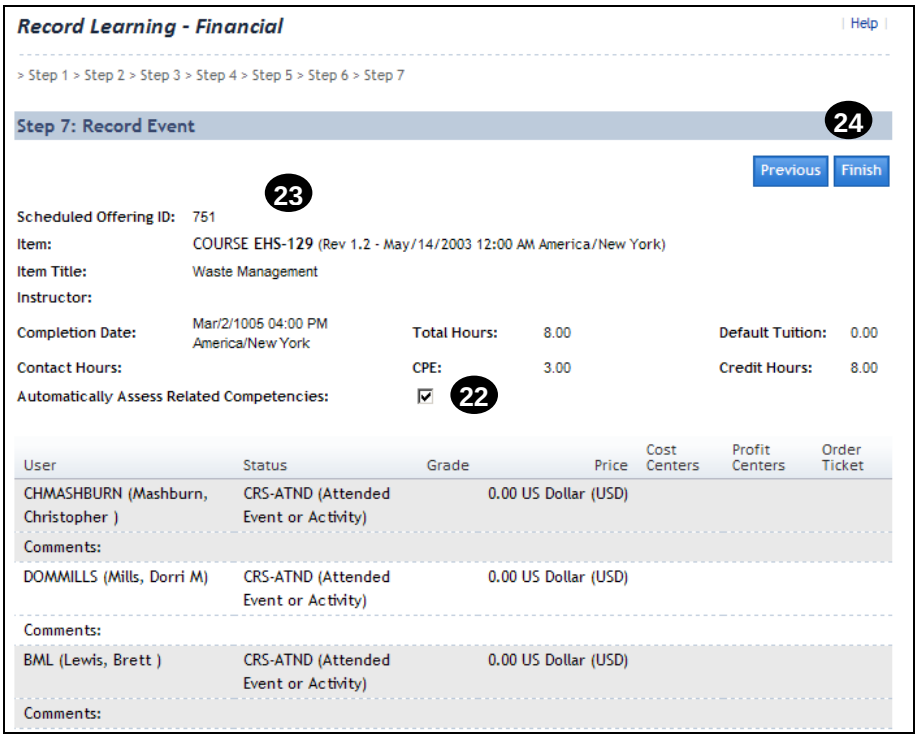


Step 7: Record Event of the Recording Learning – Financial wizard displays.

22 If competencies need to be assessed as a result of recording the learning event, select the **Automatically Assess Related Competencies** checkbox.

23 Review learning event information.

24 Select **Finish**.



A pop-up may appear requesting that the page refresh before you proceed.

25 Select **OK**.

The status is displayed.

26 Select **Print** to print a completion certificate report for each user listed.

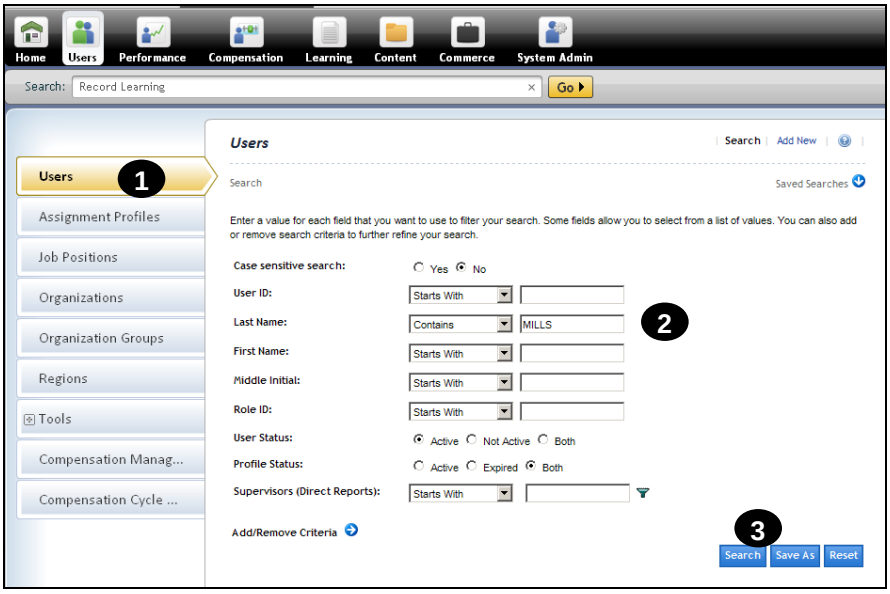
27 Select **Email…** to email a completion certificate report to each user listed.

28 Select **Start Over…** to begin the Learning Event Recorder process again. This retains all users previously selected.

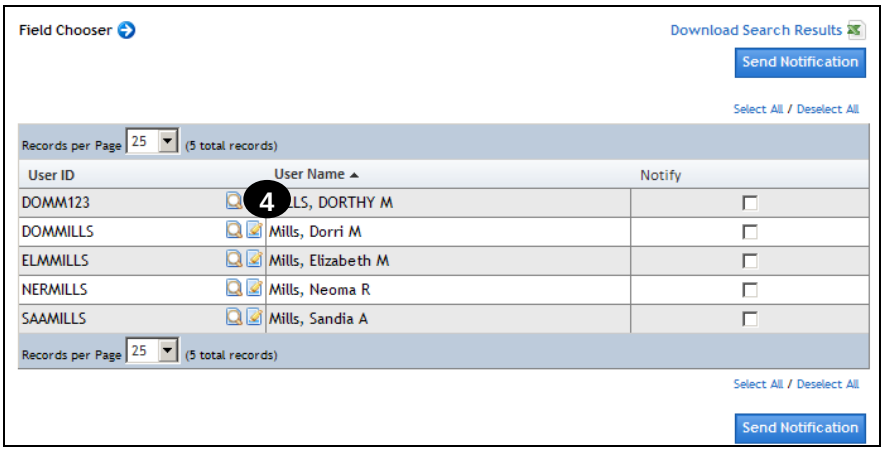
Note: *The user whose status was changed to 'No Credit' does not appear in the list of users to generate completion certificates.*

Task D. View User Learning History tab

1. Navigate to **Users > Users**.
2. Enter search criteria to find one of the users for whom you just recorded a completion.
3. Select **Search**.



4. Select the **edit icon** ( ) to select the user record.

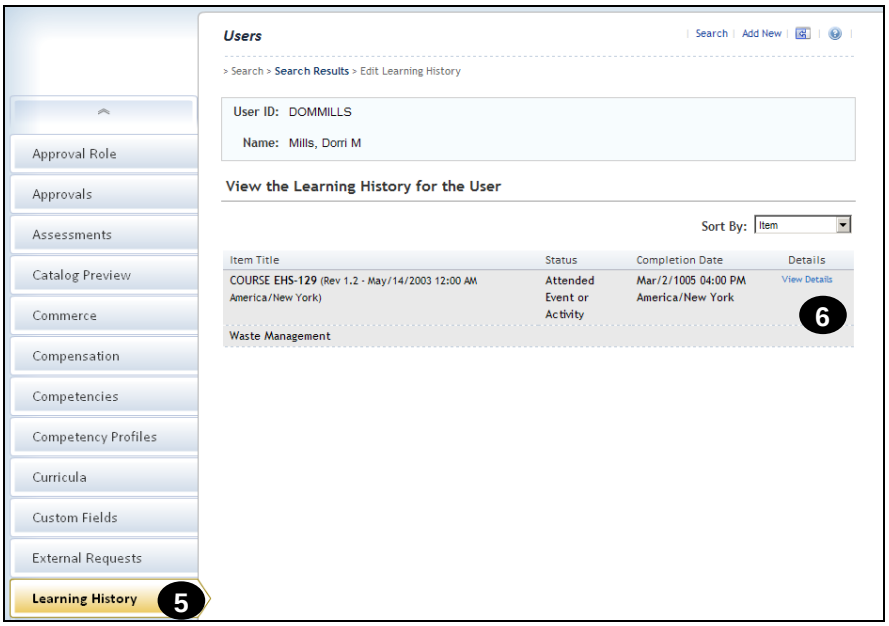


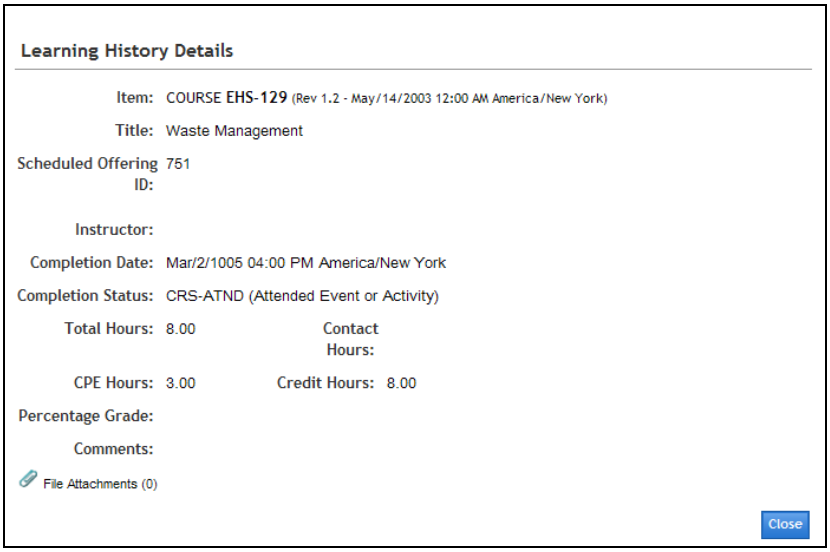
5 Select the **Learning History** tab.

View learning history.

6 Select the **View Details** link for additional information on the learning event. A separate pop-up window appears.

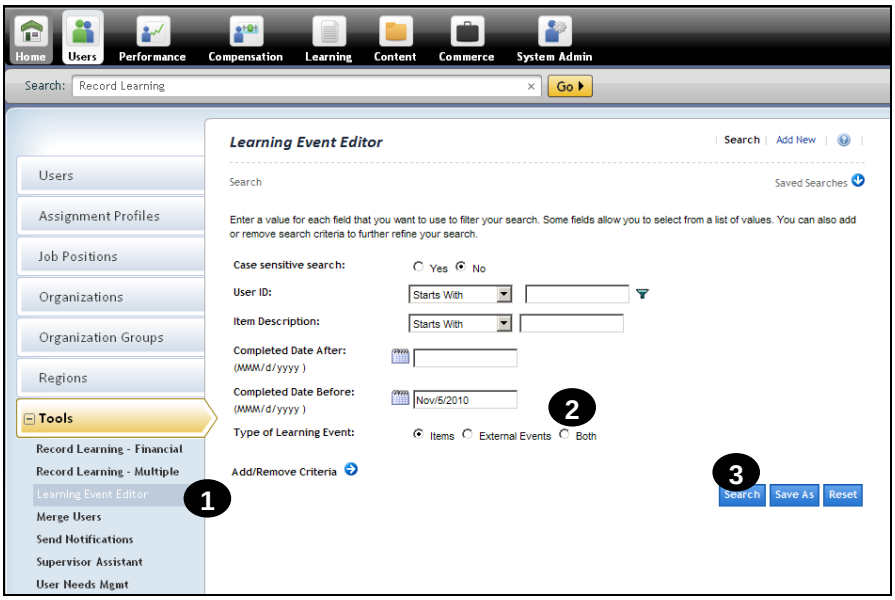
Note: *Any additional attached documents can be viewed here.*



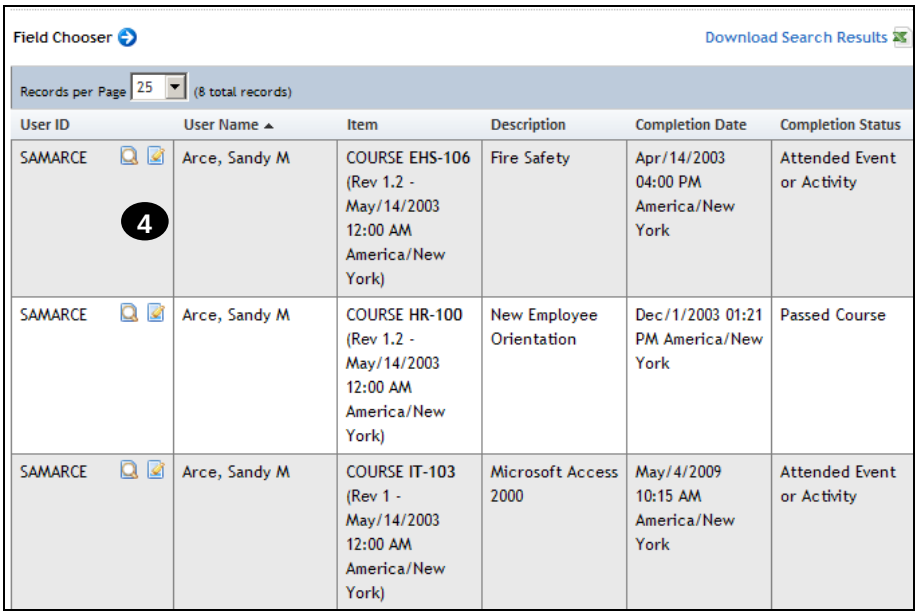


Task E. Edit Learning Event Using Learning Event Editor

1. Navigate to **Users > Tools > Learning Event Editor**.
2. Enter search criteria to find learning event (for example, search by user ID or between dates).
3. Select **Search**.



4. Select the **edit icon** ( ) to select the learning event record.



User ID	User Name	Item	Description	Completion Date	Completion Status
SAMARCE	Arce, Sandy M	COURSE EHS-106 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Fire Safety	Apr/14/2003 04:00 PM America/New York	Attended Event or Activity
SAMARCE	Arce, Sandy M	COURSE HR-100 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	New Employee Orientation	Dec/1/2003 01:21 PM America/New York	Passed Course
SAMARCE	Arce, Sandy M	COURSE IT-103 (Rev 1 - May/14/2003 12:00 AM America/New York)	Microsoft Access 2000	May/4/2009 10:15 AM America/New York	Attended Event or Activity

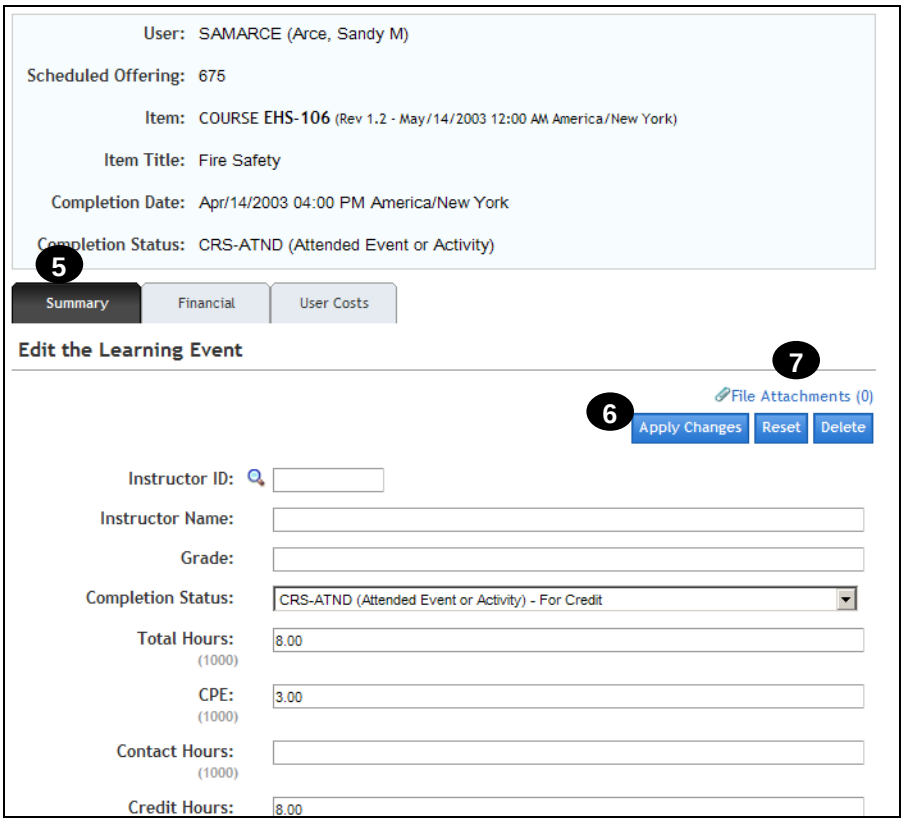
Review the learning event details.

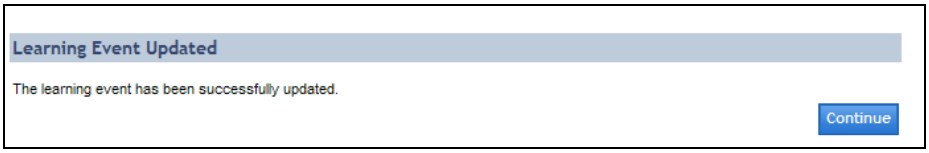
5 On the Summary tab, details such as the instructor, grade, completion status, completion date and time can be edited.

6 Select **Apply Changes** to save any edits made to the learning event record.

7 Select the **File Attachments** link to attach any external files to the learning event record.

Note: *Attachment types and size are limited to your system's configuration. Contact your administrator for details. Attachments are available to the user via* ***Completed Work****.*





Notes