

Job Aid: Record Learning - Multiple

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 - Multiple
- 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 - Multiple

Verify the **Admin** tab is selected.

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

or

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

The Record Learning - Financial wizard displays.

- 2 Select the **Item** option.

- 3 In the **Search & Add Items** section, select the item type from the drop-down menu.

- 4 Enter the Item ID in the textbox exactly.

- 5 Select **Add**.

or

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



The screenshot shows the LearningLink interface with the 'Admin' tab selected. A search bar at the top contains 'Record Learning Multiple' with a 'Go' button. The left sidebar has 'Tools' expanded, showing 'Record Learning - Multiple' selected. The main content area is titled 'Record Learning - Multiple' and contains a wizard form. Callout 1 points to the search bar. Callout 2 points to the 'Item' radio button. Callout 3 points to the 'Item Type ID' dropdown menu. Callout 4 points to the 'Item ID' text box containing 'EHS-100'. Callout 5 points to the 'Add' button. Callout 6 points to the search icon in the 'Item ID' text box.

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

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

- 7 In the *Search & Add Users* section, enter a user ID exactly.
- 8 Select **Add**.
- OR
- 9 Select the select icon (🔍) to search for and select one or more users.
- 10 Select **Next**.

- 11 Review and update the selections made on the previous page.
- 11 In the *Edit Details* section, enter details for the item for each user:
 - Completion date and time
 - Time zone
 - Grade and completion status
 - Total hours, credit hours, contact hours, and CPE
- 12 Select the **More Options** icon (⊕) to enter instructor information and comments.
Select **Apply Changes** to make the changes apply to all users.
Select **Next**.

Note: Click the expand icon (⊕) for an item to change details for specific user records.

- 15 If competencies need to be assessed as a result of recording the learning event, select the **Assess based on item setting** checkbox.
- 16 Review learning event information.
- 17 Select **Submit**.

Record Learning - Multiple [Help](#)

Initial Information > Edit Details > Confirm

17
[Previous](#) [Submit](#)

Review the summary of the learning history to be recorded by the system. If you are satisfied with the summary, click Submit to record the learning history. Use the option button to indicate the way competencies are assessed by the system when recording the learning history: **Assess based on the Item Settings**, **Assess all items**, or **Do not assess** which will have the system ignore the competencies.

Change the way competencies are assessed

Assess based on item setting Assess all items Do Not Assess

15

Item: COURSE EHS-105 (Rev 1.2 - May/14/2003 12:00 AM America/New York)

16 Title: Fire Extinguisher Workshop

User ID	User Name	Grade / Completion	Completion Date	Total Hours	Credit Hours	Contact Hours	CPE	Comments
ELACLARK	Clark, Elizabeth A	CRS-ATND	Nov/5/2010 05:35 AM America/New York	8.00	8.00		3.00	
ABKCLASSEN	Classen, Abigail K	CRS-ATND	Nov/5/2010 05:35 AM America/New York	8.00	8.00		3.00	
ANLCRAVER	Craver, Andrew L	CRS-ATND	Nov/5/2010 05:35 AM America/New York	8.00	8.00		3.00	
CHNCLOHAN	Clohan, Christina N	CRS-ATND	Nov/5/2010 05:35 AM America/New York	8.00	8.00		3.00	
CHCOFFMAN	Coffman, Christopher	CRS-ATND	Nov/5/2010 05:35 AM America/New York	8.00	8.00		3.00	

- 18 The application provides a status to let you know that the learning event has been recorded successfully.
- 18 Select **Start Over...** to begin the Learning Event Recorder process again. This retains all users previously selected.

Record Learning - Multiple [Help](#)

Initial Information > Edit Details > Confirm > Success

The Learning events were recorded successfully.

18
[Start Over...](#)

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

Verify the **Admin** tab is selected.

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

or

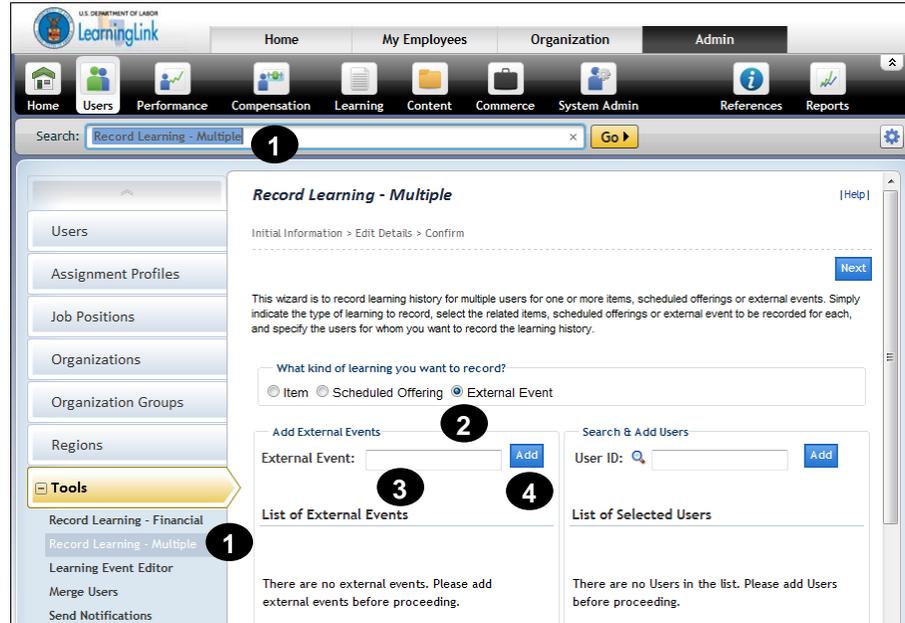
1 Enter "Record Learning" in the Search box.

The Record Learning - Financial wizard displays.

2 Select the **External Event** option.

3 In the *Add External Events* section enter a description of the external event.

4 Select **Add**.



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

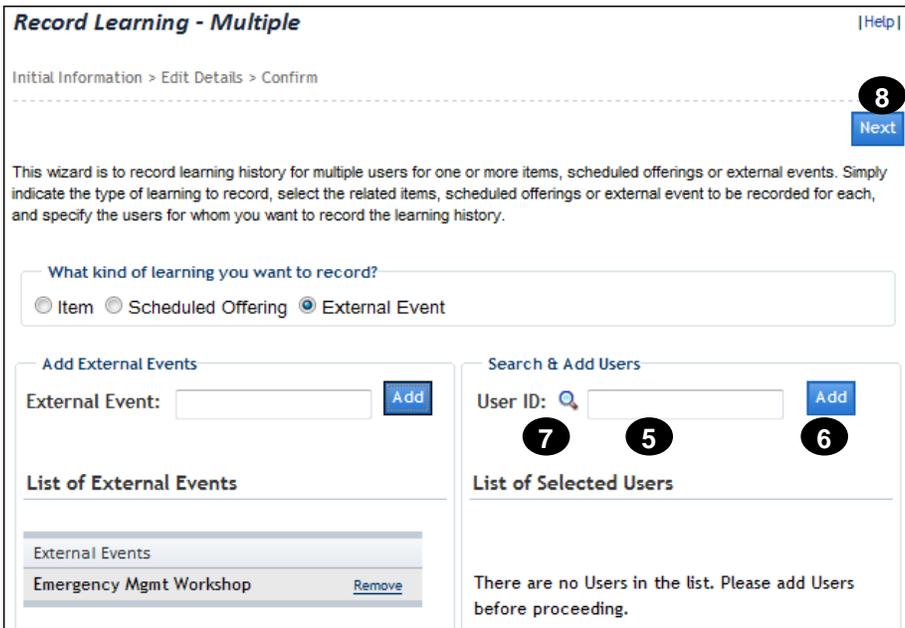
5 In the *Search & Add Users* section, enter a user ID exactly.

6 Select **Add**.

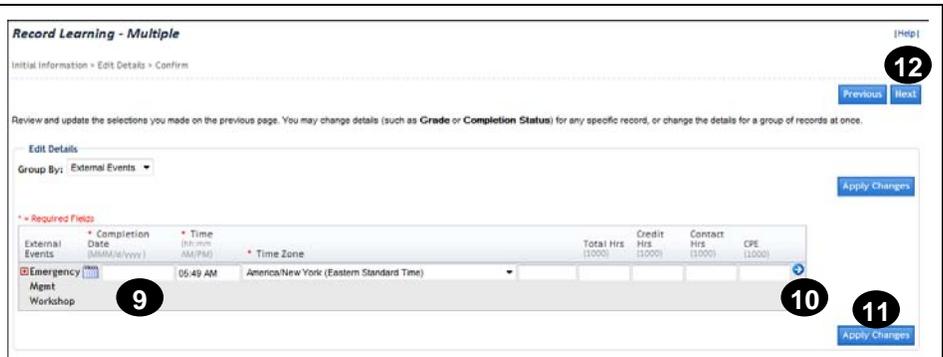
or

7 Select the select icon (🔍) to search for and select one or more users.

8 Select **Next**.

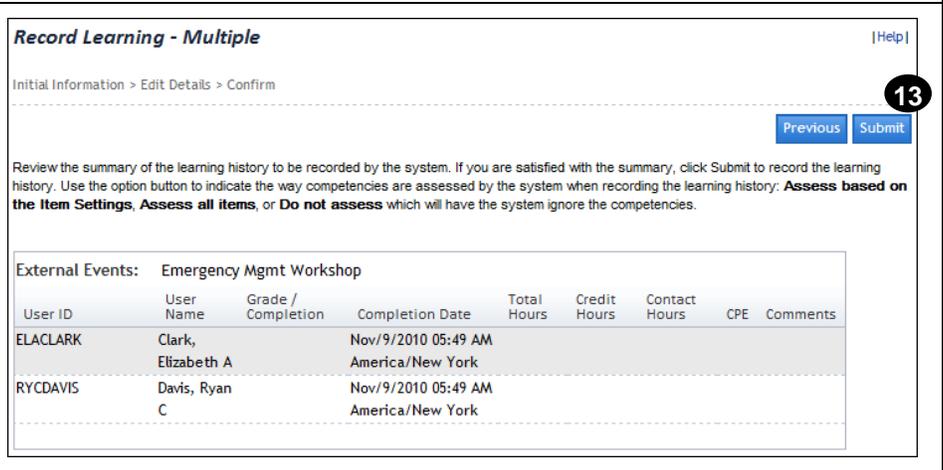


- 9 Review and update the selections made on the previous page.
- 9 In the *Edit Details* section, enter details for the item for each user:
 - Completion date and time
 - Time zone
 - Grade and completion status
 - Total hours, credit hours, contact hours, and CPE
- 10 Select the **More Options** icon (⊕) to enter instructor information and comments.
- 11 Select **Apply Changes** to make the changes apply to all users.
- 12 Select **Next**.

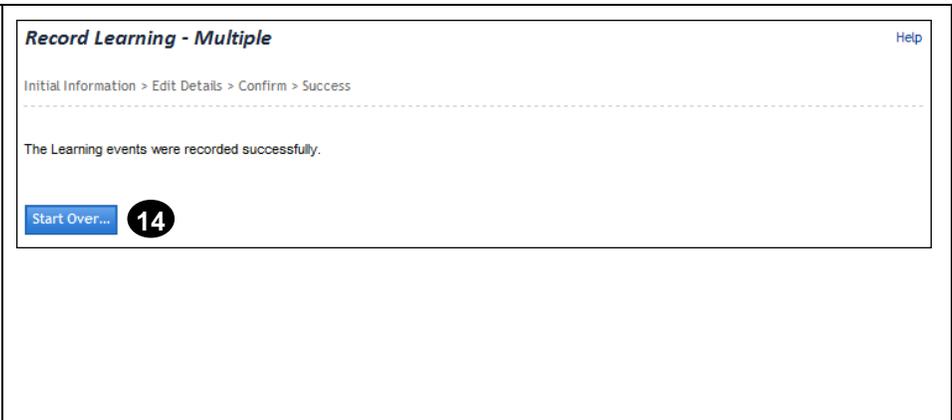


Note: Click the expand icon (⊕) for an item to change details for specific user records.

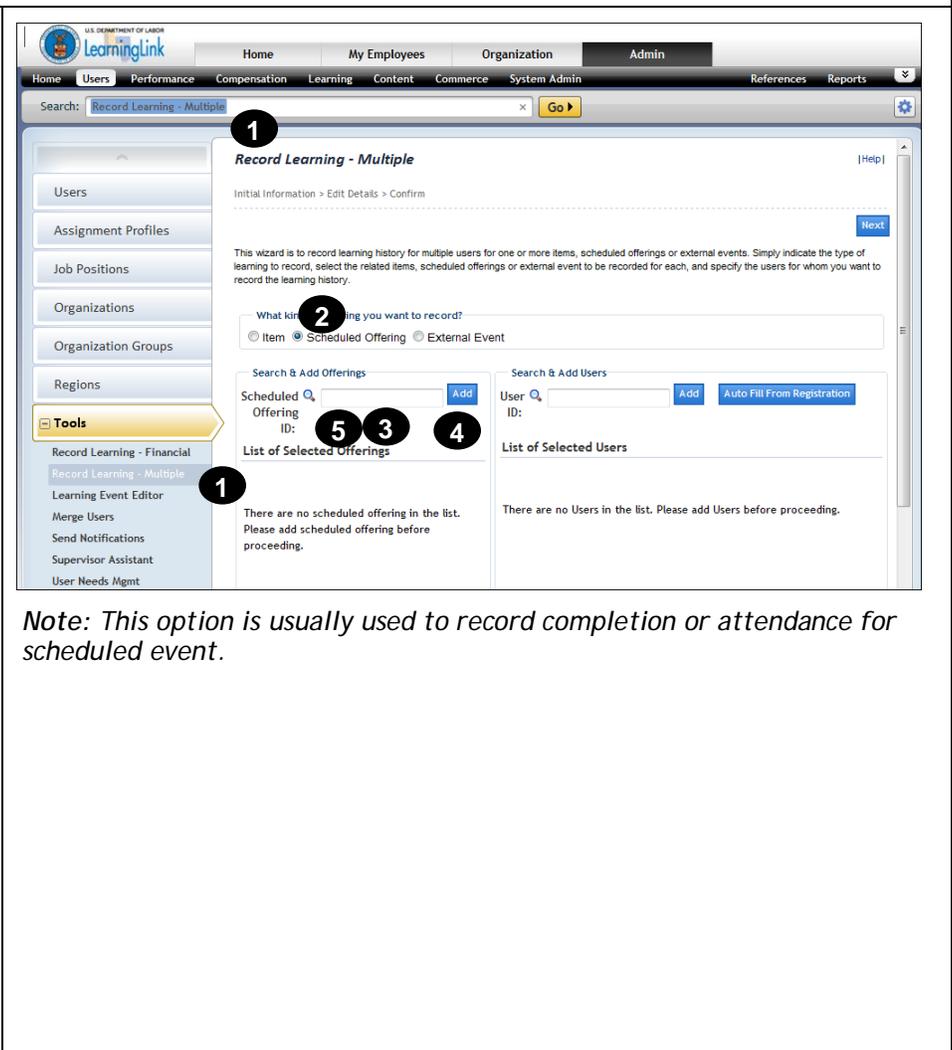
- 13 Review learning event information.
- 13 Select **Submit**.



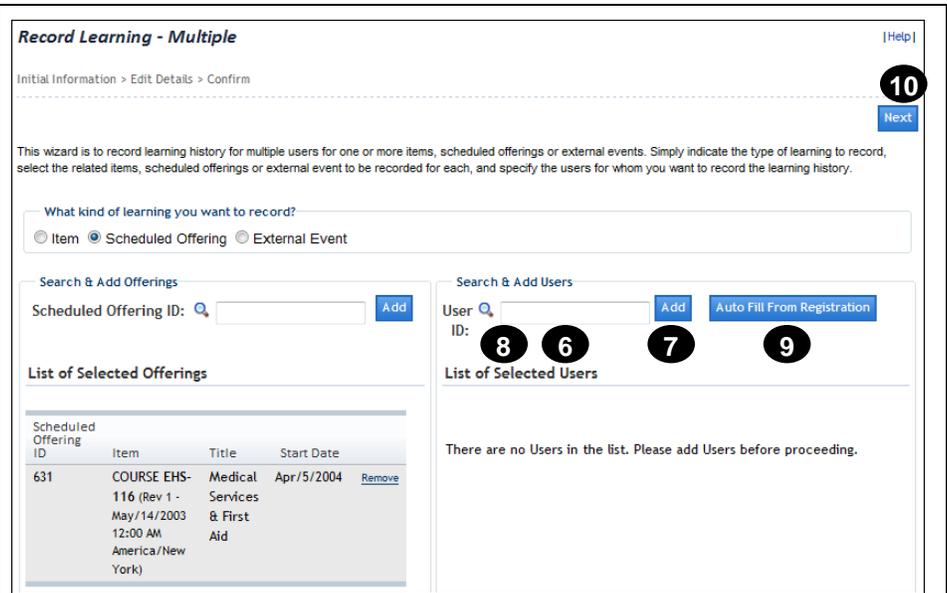
User ID	User Name	Grade / Completion	Completion Date	Total Hours	Credit Hours	Contact Hours	CPE	Comments
ELACLARK	Clark, Elizabeth A		Nov/9/2010 05:49 AM America/New York					
RYCDAVIS	Davis, Ryan C		Nov/9/2010 05:49 AM America/New York					

<p>The application provides a status that the learning event has been recorded successfully.</p> <p>14 Select Start Over... to begin the Record Learning - Financial process again. This retains all users previously selected.</p>	
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Task C. Use Learning Event Recorder to Record Completion of Scheduled Offering

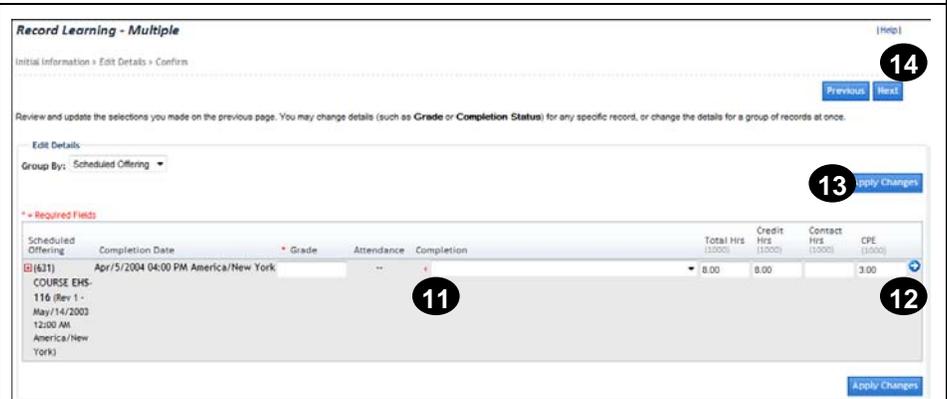
<p>Verify the Admin tab is selected.</p> <p>1 Navigate to Users > Tools > Record Learning - Multiple.</p> <p>or</p> <p>1 Enter "Record Learning" in the Search box.</p> <p>The Record Learning - Financial wizard displays.</p> <p>2 Select the External Event option.</p> <p>3 In the <i>Search & Add Offerings</i> section enter the Schedule Offering ID in the textbox exactly.</p> <p>4 Select Add.</p> <p>or</p> <p>5 Select the select icon (🔍) to search for and select a scheduled offering.</p>	 <p>Note: This option is usually used to record completion or attendance for scheduled event.</p>
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- 6** In the *Search & Add Users* section, enter a user ID exactly.
- 7** Select **Add**.
- or
- 8** Select the select icon (🔍) to search for and select one or more users.
- or
- 9** Select **Auto Fill From Registration**.
- 10** Select **Next**.



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

- 11** Review and update the selections made on the previous page.
- 11** In the *Edit Details* section, enter details for the item for each user:
 - Grade and completion status
 - Total hours, credit hours, contact hours, and CPE
- 12** Select the **More Options** icon (⊕) to enter instructor information and comments.
- 13** Select **Apply Changes** to make the changes apply to all users.
- 14** Select **Next**.



Note: Click the expand icon (⊕) for an item to change details for specific user records.

- 15 If competencies need to be assessed as a result of recording the learning event, select the **Automatically Assess Related Competencies** checkbox.
- 16 Review learning event information.
- 17 Select **Submit**.

Record Learning - Multiple [Help]

Initial Information > Edit Details > Confirm

Previous **17** Submit

Review the summary of the learning history to be recorded by the system. If you are satisfied with the summary, click Submit to record the learning history. Use the option button to indicate the way competencies are assessed by the system when recording the learning history: **Assess based on the Item Settings, Assess all items, or Do not assess** which will have the system ignore the competencies.

Change the way competencies are assessed

Assess based on item setting Assess all items Do Not Assess

15

Scheduled Offering ID: 631 **16**

Item: COURSE EHS-116 (Rev 1 - May/14/2003 12:00 AM America/New York)

Title: Medical Services & First Aid

User ID	User Name	Grade / Completion	Completion Date	Total Hours	Credit Hours	Contact Hours	CPE	Comments
ELACLARK	Clark, Elizabeth A	CRS-ATND	Apr/5/2004 04:00 PM America/New York	8.00	8.00		3.00	
ABKCLASSEN	Classen, Abigail K	CRS-ATND	Apr/5/2004 04:00 PM America/New York	8.00	8.00		3.00	
ANLCRAVER	Craver, Andrew L	CRS-ATND	Apr/5/2004 04:00 PM America/New York	8.00	8.00		3.00	

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

Record Learning - Multiple Help

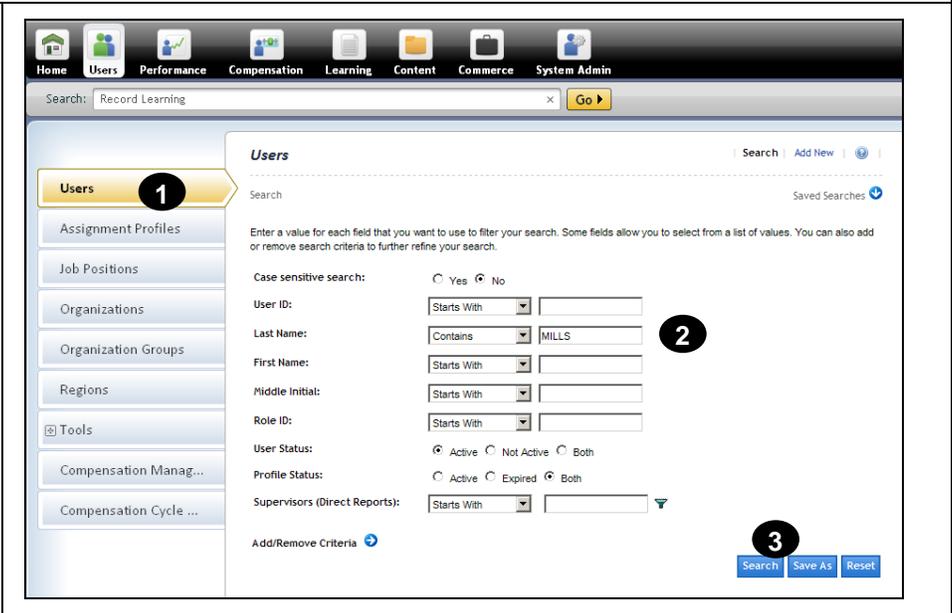
Initial Information > Edit Details > Confirm > Success

The Learning events were recorded successfully.

18 Start Over...

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**.



Home Users Performance Compensation Learning Content Commerce System Admin

Search: Record Learning Go

Users Search | Add New | [icon]

Search

Saved Searches [icon]

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.

Case sensitive search: Yes No

User ID: Starts With [input] **2**

Last Name: Contains [input] MILLS

First Name: Starts With [input]

Middle Initial: Starts With [input]

Role ID: Starts With [input]

User Status: Active Not Active Both

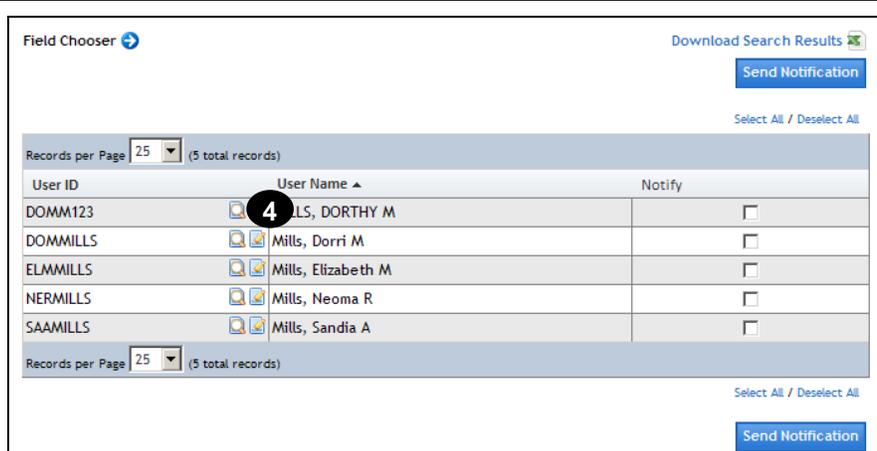
Profile Status: Active Expired Both

Supervisors (Direct Reports): Starts With [input]

Add/Remove Criteria [icon]

3 Search Save As Reset

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



Field Chooser Download Search Results 

[Send Notification](#)

[Select All / Deselect All](#)

Records per Page 25 (5 total records)

User ID	User Name	Notify
DOMM123	 4 MILLS, DORTHY M	<input type="checkbox"/>
DOMMILLS	 Mills, Dorri M	<input type="checkbox"/>
ELMMILLS	 Mills, Elizabeth M	<input type="checkbox"/>
NERMILLS	 Mills, Neoma R	<input type="checkbox"/>
SAAMILLS	 Mills, Sandia A	<input type="checkbox"/>

Records per Page 25 (5 total records)

[Select All / Deselect All](#)

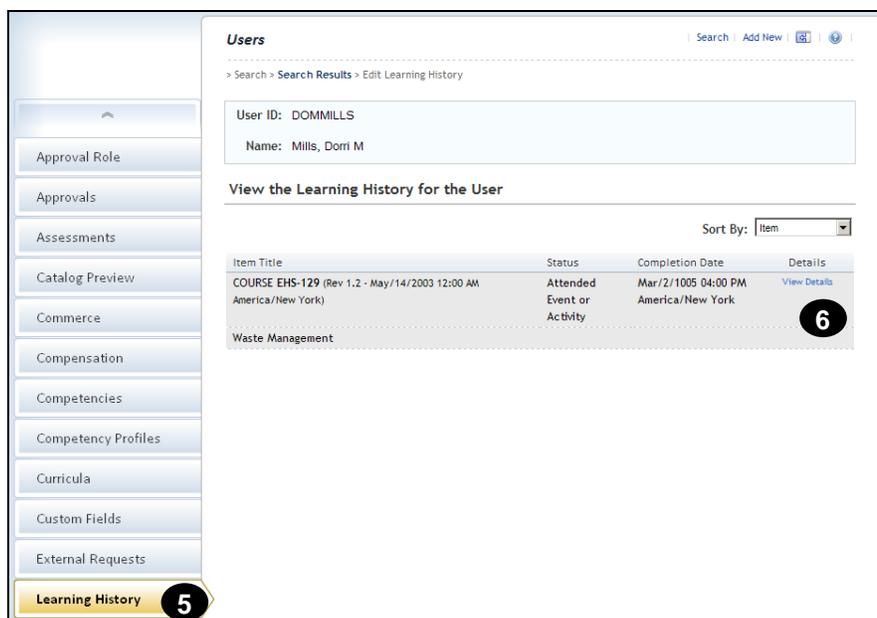
[Send Notification](#)

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.



Users Search | Add New |  | 

> Search > Search Results > Edit Learning History

User ID: DOMMILLS
Name: Mills, Dorri M

View the Learning History for the User

Sort By: Item

Item Title	Status	Completion Date	Details
COURSE EHS-129 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Attended Event or Activity	Mar/2/1005 04:00 PM America/New York	View Details
Waste Management 6			

- Approval Role
- Approvals
- Assessments
- Catalog Preview
- Commerce
- Compensation
- Competencies
- Competency Profiles
- Curricula
- Custom Fields
- External Requests
- Learning History** **5**

Learning History Details

Item: COURSE EHS-129 (Rev 1.2 - May/14/2003 12:00 AM America/New York)

Title: Waste Management

Scheduled Offering 751
ID:

Instructor:

Completion Date: Mar/2/1005 04:00 PM America/New York

Completion Status: CRS-ATND (Attended Event or Activity)

Total Hours: 8.00 Contact Hours:

CPE Hours: 3.00 Credit Hours: 8.00

Percentage Grade:

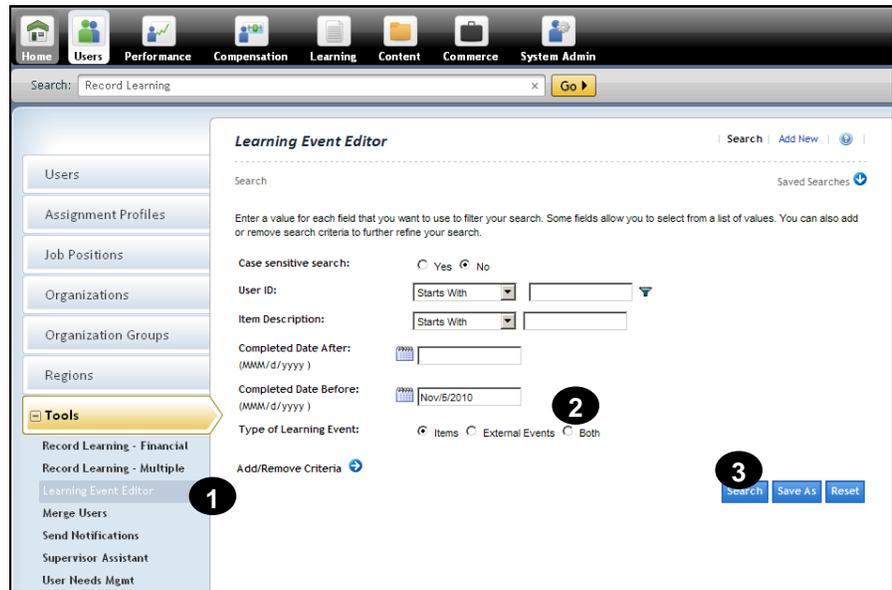
Comments:

 File Attachments (0)

[Close](#)

Task E. Edit Learning Event Using Learning Event Editor

- 1 Verify the **Admin** tab is selected.
- 1 Navigate to **Users > Tools > Learning Event Editor**.
- or
- 1 Enter "Learning Event Editor" in the Search box.
- 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.

Field Chooser [Download Search Results](#)

Records per Page: 25 (8 total records)

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

- 5 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.*

User: SAMARCE (Arce, Sandy M)

Scheduled Offering: 675

Item: COURSE EHS-106 (Rev 1.2 - May/14/2003 12:00 AM America/New York)

Item Title: Fire Safety

Completion Date: Apr/14/2003 04:00 PM America/New York

Completion Status: CRS-ATND (Attended Event or Activity)

5

Summary Financial User Costs

Edit the Learning Event

7

6 [File Attachments \(0\)](#) **Apply Changes** **Reset** **Delete**

Instructor ID:

Instructor Name:

Grade:

Completion Status:

Total Hours:
(1000)

CPE:
(1000)

Contact Hours:
(1000)

Credit Hours:

Learning Event Updated

The learning event has been successfully updated.

Continue