

**Department of Defense**

**Washington Headquarters Services (WHS)  
Human Resources Directorate  
Learning and Development Division**

## **WHS Learning Center Training Handbook**

**Employee/Supervisor/Approving Official/Training Coordinator**



**August 2009**

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## **I. Introduction**

The Washington Headquarters Services (WHS) Online Learning Center is a web-based application (Plateau Learning Center Version 5.8 SP3) that delivers, reports, and tracks employee training. The WHS Learning Center has been customized to provide OSD and WHS serviced populations with the features they need to manage their own professional development and learning activities.

### **Who Should Use this Guide?**

The Learning Center Training Handbook is designed to support those individuals that will participate in learning activities. All OSD WHS employees will be students with their own student accounts.

For additional assistance, Student Access contains a Help system that you launch by clicking on the word “Help” in the upper right-hand corner of every screen.

### **Employees Role**

All OSD and WHS serviced populations are expected to use the online learning functions of the WHS Learning Center on a regular basis to continue to develop their professional and technical skills. The WHS Learning Center helps employees to access and keep track of their assigned and optional learning experiences.

### **Getting Started**

In order to start using the Learning Center, you must know how to log in and to log out.

#### **1. Logging In**

OSD and WHS serviced personnel access the Learning Center through the WHS intranet website. To access:

1. Open an Internet Explorer browser
2. Go to <https://lms.whs.mil>
3. A pop up box will appear. Select the DOD Email CA-20 certificate.
4. Enter your CAC PIN

5. The LMS login screen will appear
6. On the LMS login screen, enter your User ID and the temporary password (Your Training Coordinator will give you your User ID and temporary password)
7. The user will need to immediately change the temporary password and create a security question
8. The user will be logged onto the WHS Learning Center

Now you will be signed on to the WHS Learning Center. If you receive an error message or have difficulty logging in, contact your Training Coordinator for assistance.

## 2. Logging Out

It's preferable to click on "log out" rather than just directly closing your browser. Before logging out of Student Access, you should first completely close any online courseware that you currently have open. In some cases, if you need to stop working in the middle of an object, the system will bookmark the page you're viewing. Bookmarking means that the next time you re-open the item, the system will automatically return you to the place where you left off. To log out of Student Access:

- Click Log Out in the top menu bar.
- You will now return to the Log In window.
- To log back in, go back to the Applications page (see Logging In, above).

NOTE: Do NOT use the Back button on your Internet browser (such as Internet Explorer) when you are using the Learning Center. The Back button is a browser control, not a control for the Learning Center and may cause errors.

## II. TERMINOLOGY and GLOSSARY

1. **Blended Learning** – A course that offers a combination of instructor-led training and an online exam at the end of the course to measure completion.
2. **Catalog** – A list or itemized display of course offerings, titles, etc.
3. **Classification** – A systematic arrangement in groups, classes or categories. There are four (4) classifications in the system:
  - a. **Instructor-led (Classroom)**
  - b. **Online Item**
  - c. **Blended**
  - d. **Other** (such as physical goods)

4. **Creation Date** – Indicates the date the curriculum was created.
5. **Curriculum** – A grouping of items and/or sub-curricula that allows you to more easily assign a given set of learning items to a user, and to track the completion and maintenance of required learning.
6. **Curriculum Type** – Indicates an area that the curriculum is specific to (HR, IT, Safety, etc).
7. **Instructor-Led Item** - A course that is offered in a classroom or part of on-the-job training. Completion is manually entered, tracked, and reported within the system.
8. **Item (Course or Class)** – Referred to as learning item, this is an assignable unit for which completion can be tracked and recorded. Items are usually learning-related such as a required course or training activity. Items can be web-based, instructor-led, or identified as required reading materials or videos.
9. **Item ID** – This is a unique identifier for each item within the Plateau Learning database. It is recommended that a standard ID naming convention be applied to items and all records in the system.
10. **Learning Event** – A user’s completion or attempted completion of a Learning course. For example, when a user’s attendance or participation in a course is recorded, a corresponding Learning Event is added to each user’s learning history (Transcript).
11. **Learning History** – A detailed list of all of the recorded Learning Events for a user.
12. **Learning Plan** – A list of items that a user must complete, with respective target or deadline completion dates for each. To view the learning plan for any user, bring the user’s information into view in the user’s section, and click the “**Learning Plan**” tab.
13. **Online Item** – An item that is offered, deployed, tracked and completed online through the learning system.
14. **Types of Learning:**
  - **Item Based Events:** Courses 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 the Learning Plan.
  - **External Events (SF182):** Authorization, Agreement and Certification of Training form that is used to request all OSD and WHS training.
  - **Scheduled Offering:** An item or learning event with a scheduled date and time.

### III. Navigation

- **Personal**  
The Personal menu provides you with tools to manage your Profile and Regional Settings.
- **Learning**  
The Learning menu contains most of the tools that you will access the most frequently, the most important of which is the Learning Plan. The Learning Plan allows you to access your assigned online learning or register in instructor-led learning.

- **Catalog**  
The Catalog contains all of the learning Items to which you have access. You can Browse by Subject Area or use the Simple or Advanced Searches to find what you are looking for.
- **Reports**  
Plateau Learning offers nine standard reports. You can run reports about your own learning and learning needs or, if you are a supervisor, about those of your employees.

## IV. LEARNING PLAN

### Identify Online Content



In the upper section of the top menu bar you will also see links marked Personal, Learning, Catalog and Reports.

1. Navigate to **Learning > Learning Plan** link..  
From the Learning Plan, all items can be filtered to show only those with online content.
2. **Log out** logs you out of the system.

NOTE: On most pages, you will also see a help icon  . Click on it to access Help files related specifically to the screen you are viewing.

## Launch Online Content

1. From the Learning Plan, click **Go to Content** for the item you wish to launch.

### Learning Plan

This page displays the complete list of the items specifically assigned to you based on your learning needs:  
The list includes items that you are required to complete on a recurring basis as well.

[Help](#)

Group Plan by:

[Field Chooser](#)

[\[Expand All\]](#) [\[Collapse All\]](#)



Title	Type	Required By	Status	Action	Remove
▶ <b>Drug-free Workplace</b>	📅		In progress	<a href="#">Go to Content</a>	
▶ <b>MS Project 2007 (Hands-On)</b>	👤		Must be registered	<a href="#">Offering Details</a>	

The Online Content Structure page displays. An item may contain one or more content objects.

2. Click the content object title link to launch the content object.
  - If it doesn't launch automatically, hold down the "Ctrl" key and click "Launch Again".
3. The content launches in a separate window. Complete the content as prescribed in the course. When the content object is complete, close the window, click Exit and
4. Click **Return to Content Structure** to continue. The completion date and time of the content object are captured. If the online item contains more than one content object, all objects typically must be completed in order for the item to be completed.
5. Click the next content object title link to continue completion of the course.

# Online Content Structure

[Help](#)

Trafficking In Persons

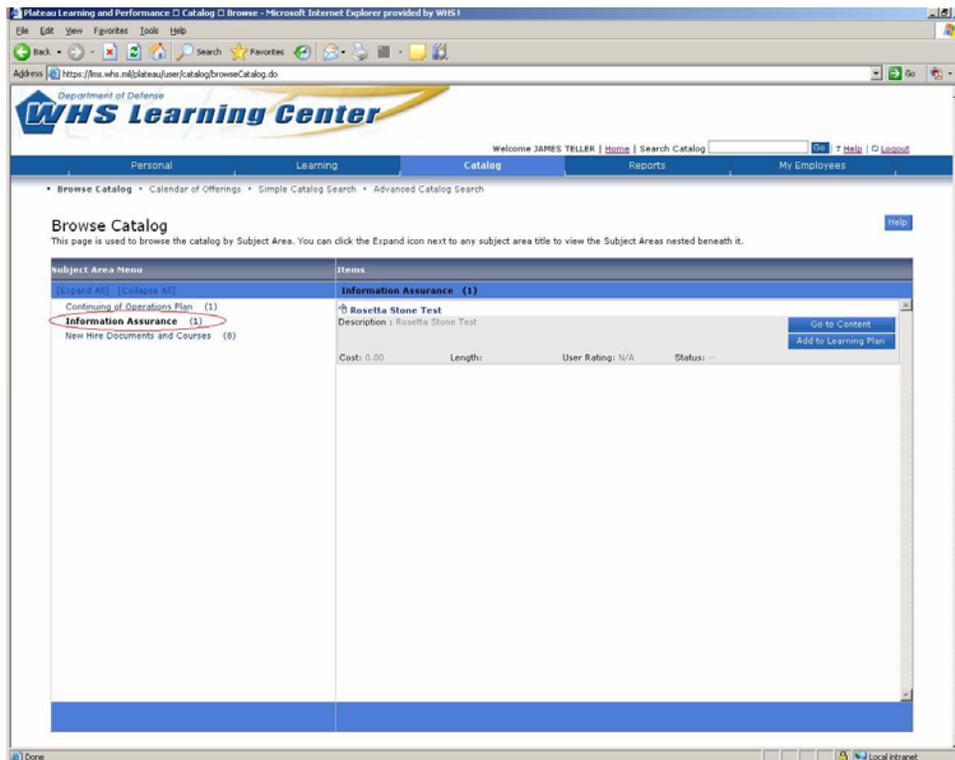
COURSE Trafficking In Persons\_AS

Revision: 1 - 7/23/2009 08:57 AM America/New York

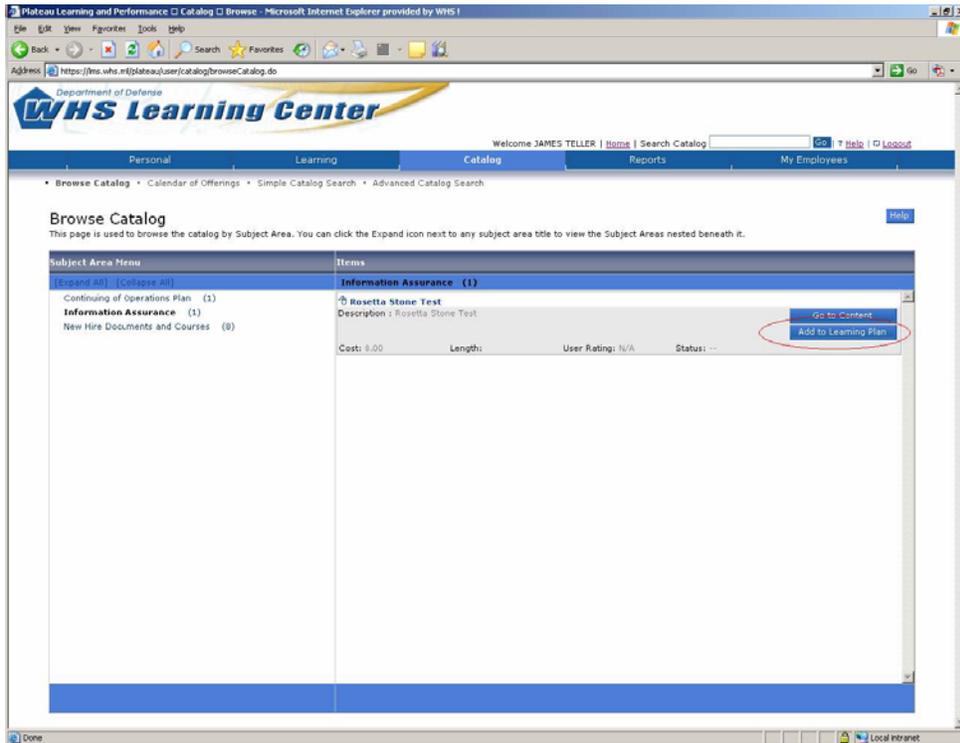
Online Content Structure		
Content Structure	Status	Completion Date
<a href="#">Introduction</a>		8/3/2009 11:57 AM America/New York
<a href="#">How</a>		8/3/2009 11:49 AM America/New York
<a href="#">What You Can Do</a>		8/3/2009 11:49 AM America/New York
<a href="#">Why</a>		
<a href="#">You</a>		

## Assign Items to a Learning Plan

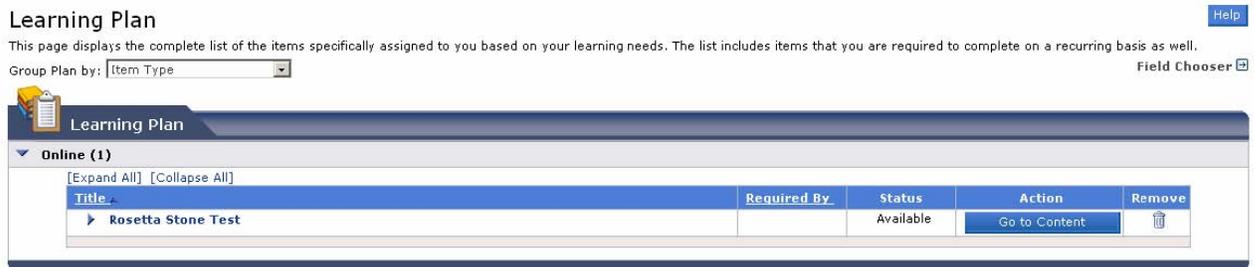
1. Navigate to **Catalog** from the top menu.
2. From **Browse Catalog** select a Subject from the **Subject Area Menu**.



3. Select **Add to Learning Plan** of the **Items** listed under the selected **Subject Area Menu**.



3. The Item will now show up on your **Learning Plan**.



## Remove Items from a Learning Plan

1. Navigate to the **Learning Plan** from the top menu.

2. Click the Trash can  icon and click OK to confirm you want to remove the item.

## Learning Plan

Help

This page displays the complete list of the items specifically assigned to you based on your learning needs. The list includes items that you are required to complete on a recurring basis as well.

Group Plan by:

Field Chooser



The screenshot shows a web interface for a Learning Plan. At the top, there's a title 'Learning Plan' and a 'Help' button. Below that, a description states: 'This page displays the complete list of the items specifically assigned to you based on your learning needs. The list includes items that you are required to complete on a recurring basis as well.' There's a 'Group Plan by:' dropdown menu set to 'Item Type' and a 'Field Chooser' button. The main content area is titled 'Learning Plan' and shows a section for 'Online (1)'. Below this, there are links for '[Expand All]' and '[Collapse All]'. A table lists the items. The first item is 'Rosetta Stone Test'. The table has columns for 'Title', 'Required By', 'Status', 'Action', and 'Remove'. The 'Remove' button is circled in red.

Title	Required By	Status	Action	Remove
▶ Rosetta Stone Test		Available	Go to Content	

### View Learning Plan (group, filter, sort)

1. Navigate to **Learning > Learning Plan** from the top menu **OR** from the Home Page, click the **Learning Plan** link.

This page displays the complete list of the items specifically assigned to you based on your learning needs. The list also includes items that you are required to complete on a recurring basis. Your learning plan can be grouped and filtered multiple ways:

- **Item Type** – When you group by item type, there is a category for instructor-led, online, and blended types. Items appear under their item type category.
- **Assignment Type** – When you group by assignment type, there is a category for every assignment type on your plan items appear under their assignment type category.
- **Due Within** – Indicates the date (timeframe) that completion is due.
- **Status toward Completion** – Indicates completion or incompleteness.

## View Learning History

### Learning History

[Help](#)

Learning History shows the learning items that you have completed. To view details, click the Title. To Sort the list, click the column header. If the Learning History becomes long, a filter pane displays so you can narrow the results.

Learning History				
Title	Type	Completion Date	Status	Action
Combating Trafficking in Persons Awareness Training	ONLINE	4/1/2008 10:39 AM America/New York	Online Completed	<a href="#">Review Content</a> <a href="#">Print Completion Certificate</a>
Combating Trafficking in Persons Awareness Training	ONLINE	4/1/2008 10:38 AM America/New York	Online Completed	<a href="#">Review Content</a> <a href="#">Print Completion Certificate</a>
EEO Preventing Discrimination	ONLINE	3/26/2008 11:14 AM America/New York	Online Completed	<a href="#">Review Content</a> <a href="#">Print Completion Certificate</a>
No Fear Act	ONLINE	3/26/2008 06:19 AM America/New York	Online Completed	<a href="#">Review Content</a> <a href="#">Print Completion Certificate</a>
EEO Preventing Discrimination	ONLINE	3/26/2008 06:08 AM America/New York	Online Completed	<a href="#">Review Content</a> <a href="#">Print Completion Certificate</a>
Combating Trafficking in Persons Awareness Training	ONLINE	3/26/2008 05:31 AM America/New York	Online Completed	<a href="#">Review Content</a> <a href="#">Print Completion Certificate</a>
Training 1		3/6/2008 12:00 AM America/New York		
Training		3/5/2008 12:00 AM America/New York		
No Fear Act	ONLINE	3/4/2008 08:00 AM America/New York	Online Completed	<a href="#">Print Completion Certificate</a>

Records per Page  (9 total records)

1. Navigate to **Learning>Learning History** from the top menu. The Learning History page shows a summary list of items completed, the dates the items were completed as well as the completion status that was recorded.
2. To view the details of a specific item, click the item title.
3. You can sort the list by the item title or completion date on the list by checking the column header.
4. The Action column allows you to review content if the item contains online content.
5. Click **Review Content** to review the online course.
6. You can also **Print Completion Certificate** on selected items.

# View A Learning Calendar

## Your Learning Calendar

[Help](#)

This page displays the Learning Items in which you have enrolled in a calendar view. You can view your Personal Learning Calendar in a Daily, Weekly, or Monthly view. Additionally, any Curriculum expirations are depicted on the Learning Calendar. All times are shown in your preferred timezone (America/New York) unless otherwise indicated.

Month <input type="checkbox"/> Week <input type="checkbox"/> Day <input type="checkbox"/>					Month of: April 2008		Calendar Options	
Monday	Tuesday	Wednesday	Thursday	Friday				
31	1	2	3	4				
7	08:00 AM: WHS New Employee Orientation	8	9	10	11			
14	15	16	17	18				
21	22	23	24	25				
28	29	30	1	2				

1. Navigate to **Learning Plan>Learning Calendar** from the top menu.
2. You may choose to see it in monthly, weekly, or daily view.
3. Click **Finish** to return.

## View Curriculum Status and Details

Department of Defense  
**WHS Learning Center**

Welcome JAMES TELLER | [Home](#) | [Search Catalog](#)  [Go](#) | [Help](#) | [Logout](#)

Personal   Learning   Catalog   Reports   My Employees

• Learning Plan • Learning Calendar • Current Registrations • **Curriculum Status** • Learning History • Record Learning • SF-182 Requests

### Curriculum Status [Help](#)

This page includes a list of curricula that have been assigned to you. Each curriculum title links to the Curriculum Details page which includes a list of the curriculum's items and Action drop-down menus where you can register for or request items. On this page you can also view the sub-curricula associated with each curriculum and access information on items as well.

Curriculum Title	Next Action Date	Assigned By	Remove
COOP		User (22657,TELLER, JAMES W)	

1. Navigate to **Learning>Curriculum Status** from the top menu. This page displays all assigned curricula, a next action date if applicable, and who assigned the curricula.
2. The curricula list can be sorted by Title, Next Action Date or Assigned by clicking the column header.
3. The status of each curriculum can be identified by the folder icon .
4. Click the curriculum title links to view curriculum details. From the curriculum details page you can view each item requirement plus sub-curricula, curriculum requirements, and/or sub-curricula requirements.
5. To view item requirements, click the **Expand Icon** for additional details about each item within the curriculum.
6. The item list can be sorted by Title, Type, Required By, or Date Completed by clicking the column header.
  - The **Type** column indicates the item type (blended, instructor-led or online).
  - The **Required By** column indicates when the item is due.
  - The **Date Completed** column indicates a completion date for the item. A green star indicates credit is provided.
  - The **Status** column indicates the status of the item.
  - The **Action** column displays different buttons depending on the item type.

## V. REGISTRATION

### Register from the Learning Plan

#### Browse Catalog

This page is used to browse the catalog by Subject Area. You can click the Expand icon next to any subject area title to view the Subject Areas nested beneath it.

Help

The screenshot displays the 'Browse Catalog' interface. On the left, the 'Subject Area Menu' is expanded to show 'New Hire Documents and Courses (8)'. The main 'Items' section lists several items, including 'TEST 4', 'TEST 5', 'TEST 6', 'WHS Class', and 'WHS New Employee Orientation'. The 'WHS Class' item is selected, and its details are shown below. The 'Register' button for the 'WHS New Employee Orientation' item is circled in red. The 'WHS Class' item also has a 'Request Schedule' button circled in red.

Description	Start Date/Time	Facility & Location	Places Filled	Price (\$)	Action
WHS New Employee Orientation	4/8/2008 08:00 AM America/New York	-	0/--	0.00	Register

1. Navigate to **Catalog** from the top menu.
2. From **Browse Catalog** select a Subject from the **Subject Area Menu**.
3. Select **Register** of the **Items** listed under the selected **Subject Area Menu**.

**Note:** Click **Request Schedule** if there is no scheduled offering given at a convenient time. Enter the date and reason for the request.

**Registration** Help

Lastly, enter any comments that you wish to be associated with your request and/or registration.

Previous Confirm

---

**Offering**

WHS New Employee Orientation  
 ONLINE WHS012  
 Revision: 1 - 3/26/2008 06:11 AM America/New York  
 Start Date: 4/8/2008 08:00 AM America/New York  
 End Date: 4/8/2008 04:00 PM America/New York  
 Capacity: 0 enrolled, 0 waitlisted  
 Price (\$): 0.00

---

**Registration Comments**

User Name: TELLER, JAMES W  
 Registration Status: ENROLL (Enrolled)  
 Comments:

Previous Confirm

On the Registration page, review the Available Scheduled Offerings and find the segment you prefer.

4. Click **Register** for the corresponding scheduled offering.
5. Enter any optional comments in the **Registration Comments** field. Use this field for comments for the instructor, such as special needs.
6. Click **Confirm**.

### Register In A Scheduled (Calendar) Offering

**Calendar of Offerings** Help

Below are the results of your search of the Calendar of Offerings. You can view the Calendar in a Monthly or Weekly view.

Month Week Day << < Month of: April 2008 > >> Calendar Search Calendar Options

Monday	Tuesday	Wednesday	Thursday	Friday
31	1	2	3	4
7	8 New Hire Documents and Courses (1 Offering)	9	10	11
14	15	16	17	18
21	22	23	24	25
28	29	30	1	2

1. Navigate to **Catalog>Calendar of Offerings** from the top menu.
2. Display the desired month by using the **Month of** drop-down or scroll through months using the arrows **OR** Click the **Calendar Search** link to use a keyword search. The subject area of the scheduled offering and the number of scheduled offerings that are scheduled for that day are displayed.
3. Click the **Subject Area** link. Review the offerings, select a segment, and click **Register** for the corresponding offering.

**Calendar of Offerings** Help

Below are the results of your search of the Calendar of Offerings. You can view the Calendar in a Monthly or Weekly view.

Subject Area:

Month  Week  Day  < Offerings on Tuesday, April 8, 2008 > Calendar Search Calendar Options

Subject Area	Title	Delivery Method	Facility	Description	Start Time	Duration	Action
New Hire Documents and Courses	WHS New Employee Orientation	Blended Learning	--	WHS New Employee Orientation	4/8/2008 08:00 AM America/New York	8.00 hours	<a href="#">Register</a>

4. Enter any comments in the **Registration Comments** field. Use this field for comments for the instructor, such as special needs.
5. Click **Confirm**. A **Confirmation Screen** displays.

## Register from the Advanced Catalog Search

**Advanced Catalog Search** Help

The Advanced Catalog Search page allows you to search the Catalog by specific Catalog fields. You can search the Catalog by Learning Items, Curriculum and Scheduled Offerings.

**Keywords**

Title:

Description:

ID:

**Search Options**

Search for:  All  Only Items  Curricula  Only Offerings

Instructor-Led  Online  Blended  Other (Select one or more)

Subject Area:   [Select](#)

Delivery Method:   [Select](#)

Source:   [Select](#)

[Search](#)

1. Navigate to **Catalog>Advanced Catalog Search** from the top menu.

2. Enter keywords to search for in the item's Title, Description, or ID fields.
3. Refine the search by selecting the desired **Search for** radio buttons and checkboxes.
4. Enter any other defining keywords for the item's Subject Area, Delivery Method and source. Click **Search**.
5. Locate the item for which you want to register and click **Add to Learning Plan**. The next step is to register for the offering from your Learning Plan. Click **Offering Details**.

### Search Results

[Help](#)

Select an Action from the Action buttons or click the Expand icon to view the Scheduled Offerings available for a Learning Item. You can refine your Search by clicking the **Refine Search** link at the top of the page.

[← Refine Search](#)

Catalog Search Results				
Title	Type	Price (\$)	Status	Action
No Fear Act		0.00	--	<a href="#">Go to Content</a> <a href="#">Add to Learning Plan</a>

6. Click **Register** for the scheduled offering in which you want to register. Note: Click **View Details** to view the segment details of the scheduled offering.
7. Enter any comments in the **Registration Comments** field. Use this field for comments for the instructor, such as special needs.
8. Click **Confirm**.

## Withdraw From a Scheduled Offering via Current Registration

### Current Registrations

[Help](#)

This page displays the list of Scheduled Offerings that you are registered for based on your learning needs. To view the details of a Scheduled Offering, click the Title link. If you are able to Withdraw from a Scheduled Offering without the assistance of an Administrator, you can select **Withdraw** from the drop down box and click **Go**.

Current Registrations					
Title	Description	Start Date/Time	Facility & Location	Status	Action
<a href="#">WHS New Employee Orientator</a>	WHS New Employee Orientaton	4/8/2008 08:00 AM America/New York	-	Enrolled	<a href="#">Withdraw</a>

1. Navigate to **Learning>Current Registrations** from the top menu. Locate the scheduled offering for which you want to withdraw.
2. Click **Withdraw**. A warning pop-up displays asking “Are you sure you want to Withdraw?” (OK or Cancel)
3. Click **OK** to continue.
4. If you wish to remove the associated item from your Learning Plan, click **Yes**. You have successfully withdrawn from a scheduled offering.

## Withdraw From a Scheduled Offering via Learning Plan

Learning Plan Help

This page displays the complete list of the items specifically assigned to you based on your learning needs. The list includes items that you are required to complete on a recurring basis as well.

Group Plan by:  Field Chooser

**Learning Plan**

▼ Blended (1) [Expand All] [Collapse All]

Title	Required By	Status	Action	Remove
▶ WHS New Employee Orientation		Enrolled / Available	<a href="#">Go to Content</a> <a href="#">View registration</a>	

1. Navigate to **Learning>Learning Plan** from the top menu. Display the desired scheduled offering by sorting the Learning Plan to show all registered items only.
2. Click **View Registration**. The scheduled offering registration page displays.
3. Click **Withdraw**. A warning pop-up displays asking “Are you sure you want to Withdraw?” (OK or Cancel). Click **OK**.
4. If you wish to remove the associated item from your Learning Plan, click **Yes**. You have successfully withdrawn from a scheduled offering.

## VI. Catalog Search

### Locate and Assign Items to Learning Plan Using Simple Catalog Search

**Search Results** Help

Enter Keywords to search Item, Curriculum title and Description fields.

Keywords:   Exact Phrase

Curricula  Instructor-Led  Online  Blended  Other (Select one or more)

Catalog Search Results				
Title	Type	Price (\$)	Status	Action
No Fear Act		0.00	--	<input type="button" value="Go to Content"/> <input type="button" value="Add to Learning Plan"/>

1. Select **Catalog>Simple Catalog Search** from the top menu.
2. Enter keywords to search for in the Catalog's Item, Title, and Description fields.
3. Select the type of Item you are searching for in the corresponding checkboxes. Click the **Search** button.
4. Locate the Item you want to add and click the **Add to Learning Plan** button. To revise the search, repeat steps 2-4 at the top of the Search Results page.

### Locate and Assign Items to Learning Plan Using Advanced Catalog Search

**Advanced Catalog Search** Help

The Advanced Catalog Search page allows you to search the Catalog by specific Catalog fields. You can search the Catalog by Learning Items, Curriculum and Scheduled Offerings.

**Keywords**

Title:

Description:

ID:

**Search Options**

Search for:  All  Only Items  Curricula  Only Offerings

Instructor-Led  Online  Blended  Other (Select one or more)

Subject Area:

Delivery Method:

Source:

1. Select **Catalog>Advanced Catalog Search** from the top menu.
2. Enter keywords to search for in the Catalog's Title, Description or ID fields.
3. Refine the search by selecting the desired Search for radio buttons and checkboxes.
4. Enter any other defining keywords for Subject Area, Delivery Method and Source.
5. Click the **Search** button.
6. Locate the item you want to add and click the **Add to Learning Plan** button. To revise the search, click on the Refine Search link at the top of the page.

## Locate and Assign Items to Learning Plan by Browsing Catalog

### Browse Catalog

[Help](#)

This page is used to browse the catalog by Subject Area. You can click the Expand icon next to any subject area title to view the Subject Areas nested beneath it.

Subject Area Menu	Items
<a href="#">[Expand All]</a> <a href="#">[Collapse All]</a>	<b>Information Assurance (1)</b>
Continuing of Operations Plan (1)	 <b>Rosetta Stone Test</b>
<b>Information Assurance (1)</b>	Description : Rosetta Stone Test <span style="float: right;"> <a href="#">Go to Content</a>  <a href="#">Add to Learning Plan</a> </span>
New Hire Documents and Courses (8)	Cost: 0.00      Length:      User Rating: N/A      Status: --

1. Select **Catalog>Browse Catalog** from the top menu.
2. Select a Subject Area to expand. The number in parenthesis indicates how many items are currently available for that subject area.
3. Locate the Item you want to add and click the **Add to Learning Plan** button.

## VII. Reports

### Generate a Report

**Reports** Help

Select a Report from the list below to run a report for yourself or your subordinates.

Report Name
Close-Fit Jobs
Competency Assessment Comparison
Competency Assessment Trend
Curriculum Status
Item Requests
Item Status
Learning History
Learning Hours
Learning Needs
Learning Plan
Multi-Rater Peer Vs User
My Plan
Tuition
User Information

1. From the **Reports** menu, select the desired report from the left navigation sub-menus.
2. Specify a report title, header and footer if desired.
3. Select a report destination and format.
4. Check the checkboxes to set masking and page break settings.
5. Using the search fields available, search for and submit the report criteria you wish to appear in the report.
6. Click **Run Report**.

## Save a Report

Reports [Help](#)

[← Back to Browse Reports](#)

**Run User Learning Plan**

User:  Self  Direct Subordinates  All Subordinates  All

Report Title:

Report Header:

Report Footer:

Report Destination:  Browser  Local File

Report Format:  XML  CSV  HTML  PDF

Mask User IDs

Page Break Between Records

---

Sort By:  Item  Required Date  Assignment Type  Curriculum

List By:  All  Needs  Requirements

[Run Report](#) [Reset](#)

1. Choose your report and specify the format and output type.
2. Use the search fields to create report filters.
3. Click **Save Report**.
4. Enter a Saved Report ID and a description. Click **Submit**. **Note:** Navigate to **Reports>System Admin>Saved Reports** to access saved reports.

## APPENDIX I - Supervisor/Training Coordinator/Approving Official

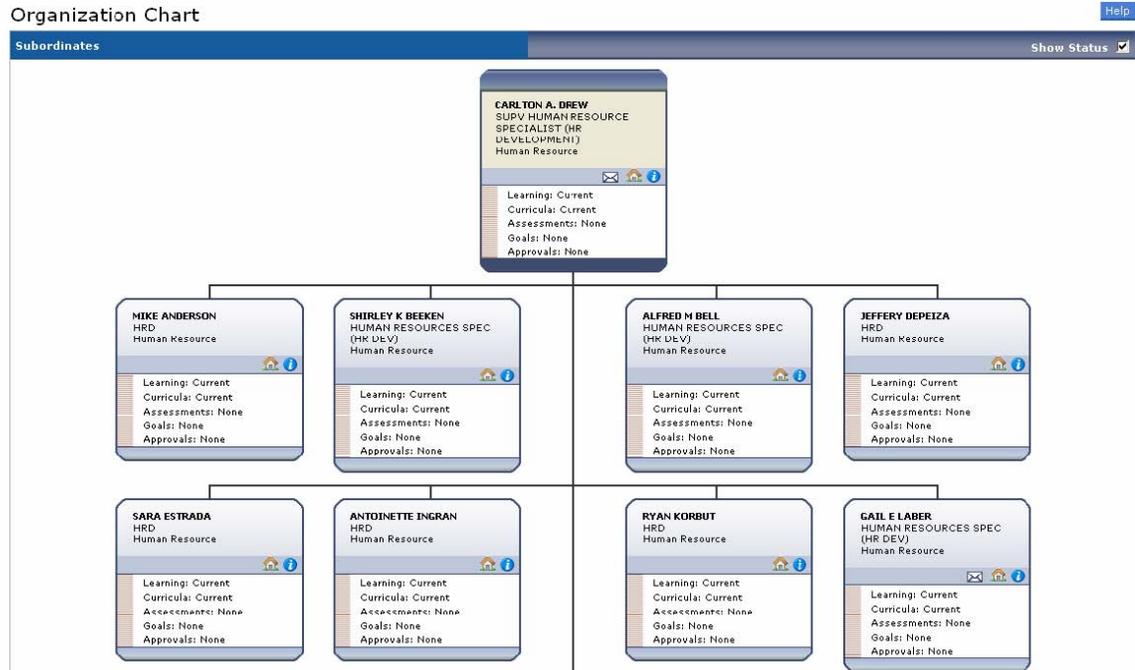
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# I. Learning Plan

## Open and View a Subordinate's Record

1. Navigate to **My Employees>Organization Chart** from the top menu. An organization chart displays.



2. Click the **information icon** (*i*) to gain a snapshot of the subordinate's status and records. The snapshot is launched in a separate window.
3. Click **Close** to return to the organization chart.
4. Click the links listed for **Learning, Curricula, Reviews, Assessments, or Goals** to navigate to the subordinate's record for additional details.
5. When you are finished viewing or editing the subordinate's record, return to your own session by clicking the **Return to Org Chart** link.

## Approve or Deny Training Requests

1. Navigate to **Personal>Approvals** from the top menu **OR** from the Home Page, click the **You have User Training Approvals** link.
2. Click the **Approve** radio button next to the user's name.
3. Click **Next**.
4. Optional: Enter the reasons for approval. Click **Next**.
5. Click **Confirm**. Email notifications are sent to all affected users.

**6** When you are finished viewing or editing the subordinate's record, return to your own session by clicking the **Return to Org Chart** link.

**Task B: Approve or Deny Training Requests**

**1** Navigate to **Personal** → **Approvals** from the top menu.

**or**

**1** From the Home Page, click the **You have User training approvals** link.

**2** Click the **Approve** radio button next to the user's

**1** Alerts

- 1 You have User training approvals
- 1 You have overdue learning
- 1 You have assessment nominations to complete

Pending Reviews and Approvals

## Assign Items to an Employee's Learning Plan

1. Navigate to **My Employees>Learning Plans** from the top menu.

- 4 Check the **Select** checkbox next to the corresponding subordinate to assign an item.

*Note: If a user has subordinates, you can click the **Include Subordinates** check box to assign the item to those users as well.*

- 5 Click **Add Checked**.

Manage Learning Plan  
Select Management Action → Select Users

User Name	Select User	Include Subordinates
Arce, Sandy M	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Clark, Elizabeth A	<input type="checkbox"/>	<input type="checkbox"/>
Classen, Abigail K	<input type="checkbox"/>	<input type="checkbox"/>
Clohan, Christina N	<input type="checkbox"/>	<input type="checkbox"/>
Coffman, Christopher	<input type="checkbox"/>	<input type="checkbox"/>
Coleman, Christina L	<input type="checkbox"/>	<input type="checkbox"/>
Craver, Andrew L	<input type="checkbox"/>	<input type="checkbox"/>

1

5

Previous Next  
Add Checked  
Select All / Deselect All

List of Selected Users

User Name	Remove
Arce, Sandy M	<input type="checkbox"/>

Select All / Deselect All  
Remove Checked

- 6 Review the list of selected users.

- 7 Click **Next**.

Manage Learning Plan  
Select Management Action → Select Users

User Name	Select User	Include Subordinates
Arce, Sandy M	<input type="checkbox"/>	<input type="checkbox"/>
Clark, Elizabeth A	<input type="checkbox"/>	<input type="checkbox"/>
Classen, Abigail K	<input type="checkbox"/>	<input type="checkbox"/>
Clohan, Christina N	<input type="checkbox"/>	<input type="checkbox"/>
Coffman, Christopher	<input type="checkbox"/>	<input type="checkbox"/>
Coleman, Christina L	<input type="checkbox"/>	<input type="checkbox"/>
Craver, Andrew L	<input type="checkbox"/>	<input type="checkbox"/>

6

7

Previous Next  
Add Checked  
Select All / Deselect All

List of Selected Users

User Name	Remove
Clark, Elizabeth A	<input type="checkbox"/>
Classen, Abigail K	<input type="checkbox"/>

Select All / Deselect All  
Remove Checked

Search for the item(s) to add.

- 8 Enter keywords in the **Keywords** text field.

Manage Learning Plan  
Select Management Action → Search for Items and Curriculum

Search for Items and Curriculum

Enter keywords to search. Remove

8

2. Click the **Add Items and Curricula** radio button. Click **Next**.

3. Click the **Select** checkbox next to the corresponding employee to assign an item. **Note:** If an employee has subordinates, you can click the **Include Subordinates** checkbox to assign the item to those users as well.

4. Click **Add Checked**.

5. Review the list of selected users. Click **Next**. Search for the item(s) to add.

6. Enter keywords in the **Keywords** text field. Click **Search**.
7. Add items by checking the corresponding **Add** checkboxes.
8. Click **Add Checked**.
9. Edit the Assignment Type and Assign Date as needed. Click **Next**. Click **Finish**.

Click **Start Over** to add additional items or curricula to the selected employees.

### **Remove Items From an Employee's Learning Plan**

1. Navigate to **My Employees>Learning Plans from** the top menu.
2. Click the **Remove Items** radio button. Click **Next**.
3. Check the **Selected User** checkbox next to the corresponding employee to remove an item from his or her learning plan. Click **Add Checked**.
4. Review the list of selected users. Click **Next**.
5. Search for the item(s) to remove. Enter keywords in the **Keywords** text field. Click **Search**.
6. Select the items to remove by checking the corresponding **Add** checkboxes. Click **Add Checked**.
7. Review the item selected to be removed. Click **Next**.
8. Review user and item selections. Click **Finish**. A status message appears indicating successful removal of the item(s).
9. Click **Start Over** to remove additional items from the selected employees' learning plan.

## View an Employee's Learning Plan (group, filter, sort)

1. Navigate to My **Employees>Organization Chart** from the top menu.
2. Click the employee's **Learning** link to view his/her Learning Plan.
3. View the employee's learning plan. You may customize the view by filtering, sorting, adding, or removing fields, or grouping learning plans by item type, assignment type, requirement interval, or status.
4. When you are finished viewing the employee's Learning Plan, return to your own session by clicking the **Return to Org Chart** link.

## View an Employee's Learning History

1. Navigate to **My Employees>Organization Chart>Learning>Learning History** from the top menu.

The Learning History page shows a summary list of items completed, the dates the items were completed as well as the completion status that was recorded.

2. To view the details of a specific item, click the item title.
3. You can sort the list by the item title or completion date on the list by checking the column header.

The Action column allows you to review content if the item contains online content.

4. Click **Review Content** to review the online course.

## View Curriculum Status and Details

1. Navigate to **Learning>Curriculum Status** from the top menu. This page displays all assigned curricula, a next action date if applicable, and who assigned the curricula.
2. The curricula list can be sorted by Title or Next Action Date by clicking the column header.
3. The status of each curriculum can be identified by the folder icon. If a green checkmark displays on the folder, the curriculum is complete.
4. Click the curriculum title links to view curriculum details. From the curriculum details page you can view each item requirement plus sub-curricula, curriculum requirements, and/or sub-curricula requirements.
5. To view item requirements, click the **expand icon** for additional details about each item within the curriculum.
6. The item list can be sorted by Title, Required By, or Date Completed by clicking the column header.
  - The Type column indicates the item type (blended learning, instructor-led or online).
  - The Required By column indicates when the item is due.
  - The Date Completed column indicates a completion date for the item. A green star indicates credit is provided.
  - The Status column indicates the status of the item.
  - The Action column displays different buttons depending on the item.

## II. REGISTRATION

### Register an Employee from the Learning Plan

1. Navigate to **Learning>Learning Plan** from the top menu. Locate the scheduled offering for which you want to register.
2. Click **Offering Details** for registration information.
  - a. **Note:** Click **Request Schedule** if there is no scheduled offering given at a convenient time. Enter the date and reason for the request.
  - b. On the Registration page, review the Available Scheduled Offerings and find the segment you prefer.
3. Click **Register** for the corresponding scheduled offering.
4. Enter any optional comments in the **Registration Comments** field. Use this field for comments for the instructor, such as special needs.
5. Click **Confirm**.

### Register an Employee from the Calendar of Offerings

1. Navigate to Catalog>Calendar of Offerings from the top menu.
2. Display the desired month by using the **Month of** drop-down or scroll through months using the arrows **OR** Click the **Calendar Search** link to use a keyword search. The subject area of the scheduled offering and the number of scheduled offerings that are scheduled for that day are displayed.
3. Click the **Subject Area** link.
4. Review the offerings, select a segment, and click **Register** for the corresponding offering.

5. Enter any comments in the **Registration Comments** field. Use this field for comments for the instructor, such as special needs.
6. Click **Confirm**. A **Confirmation Screen** displays.

### **Register an Employee from the Advanced Catalog Search**

1. Navigate to **Catalog>Advanced Catalog Search** from the top menu.
2. Enter keywords to search for in the item's Title, Description, or ID fields.
3. Refine the search by selecting the desired **Search for** radio buttons and checkboxes.
4. Enter any other defining keywords for the item's Subject Area, Delivery Method and source. Click **Search**.
5. Locate the item for which you want to register and click **Add to Learning Plan**. The next step is to register for the offering from your Learning Plan. Click **Offering Details**.
6. Click **Register** for the scheduled offering in which you want to register. Note: Click **View Details** to view the segment details of the scheduled offering.
7. Enter any comments in the **Registration Comments** field. Use this field for comments for the instructor, such as special needs.
8. Click **Confirm**.

### **Register An Employee In A Scheduled Offering**

1. Navigate to **My Employees>Registrations** from the top menu.
2. Click the **Register Users** radio button. Click **Next**.
3. Search for a scheduled offering by entering keywords. Click **Next**.
4. Click the **Select** radio button to select a scheduled offering option. Click **Next**.

5. Check the **Select** checkbox next to the corresponding employee to register. Check **Next**.
6. Verify the list of employees, enter optional comments and Click **Next**.
7. Enter financial information, if applicable, and Click **Next**.
8. Select the email recipients by checking the corresponding **Email confirmation** checkboxes.
9. Click **Finish**. The message displays that registration is successful.

### **Withdraw an Employee From A Scheduled Offering**

1. Navigate to **My Employees>Registrations** from the top menu.
2. Click the **Withdraw Users** radio button. Click **Next**.
3. Search for a scheduled offering by entering keywords. Click **Next**.
4. Select a scheduled offering option. Click **Next**.
5. Click the **Select** checkbox next to the corresponding employee to withdraw. Click **Next**.
6. Select the email recipients by checking the corresponding **Email confirmation** checkboxes. Remove the item from the employee's learning plan by checking the corresponding checkbox.
7. Click **Finish**. The message displays that withdrawal from the scheduled offering is successful.

### **Withdraw an Employee From a Scheduled Offering via Current Registration**

1. Navigate to **My Employees>Current Registrations** from the top menu. Locate employee and the scheduled offering for which you want to withdraw.
2. Click **Withdraw**. A warning pop-up displays asking “Are you sure you want to Withdraw? (OK or Cancel). Click **OK** to continue.
3. If you wish to remove the associated item, click **Yes**. You have successfully withdrawn the employee from a scheduled offering.

### **Withdraw an Employee From a Scheduled Offering via Learning Plan**

1. Navigate to **My Employees>Learning Plans** from the top menu. Display the employee and the scheduled offering for which you want to withdraw. .
2. Click **View Registration**. The scheduled offering registration page displays.
3. Click **Withdraw**. A warning pop-up displays asking “Are you sure you want to Withdraw? (OK or Cancel). Click **OK**.
4. If you wish to remove the associated item from your Learning Plan, click **Yes**.

You have successfully withdrawn from a scheduled offering.

### III. Catalog Search

#### Locate and Assign Items to Learning Plan Using Simple Catalog Search

1. Select **Catalog>Simple Catalog Search** from the top menu.
2. Enter keywords to search for in the Catalog's Item, Title, and Description fields.
3. Select the type of Item you are searching for in the corresponding checkboxes. Click the **Search** button.
4. Locate the Item you want to add and click the **Add to Learning Plan** button. To revise the search, repeat steps 2-4 at the top of the Search Results page.

#### Locate and Assign Items to Learning Plan Using Advance Catalog Search

1. Select **Catalog>Simple Catalog Search** from the top menu.
2. Enter keywords to search for in the Catalog's Title, Description or ID fields.
3. Refine the search by selecting the desired Search for radio buttons and checkboxes.
4. Enter any other defining keywords for Subject Area, Delivery Method and Source. Click the **Search** button.
5. Locate the item you want to add and click the **Add to Learning Plan** button. To revise the search, click on the Refine Search link at the top of the page.

## Locate and Assign Items to Learning Plan by Browsing Catalog

1. Select **Catalog>Browse Catalog** from the top menu.
2. Select a Subject Area to expand. The number in parenthesis indicates how many items are currently available for that subject area.
3. Locate the Item you want to add and click the **Add to Learning Plan** button.

## **VII. Reports**

### Run a Report

1. Click **Reports** from the top menu.
2. Click a **Report Name** to open the report.
3. Enter the report criteria. (Available criterion will vary depending on the report.)
4. Check the checkboxes to set masking and page break settings.
5. Using the search fields available, search for and submit the report criteria you wish to appear in the report. Click **Run Report**.

### Save a Report

1. Choose your report and specify the format and output type.
2. Use the search fields to create report filters.
3. Click **Save Report**.
4. Enter a Saved Report ID and a description. Click **Submit**. **Note:** Navigate to **Reports>System Admin>Saved Reports** to access saved reports.

## **Schedule a Report to Recur and Deliver via Email**

1. Choose your report and specify format and output type.
2. Use the search fields to create report filters. **Note:** Use **Submit Criteria** instead of selecting and submitting search results. If the report is scheduled to recur, this ensures that the data is updated every time the report runs.
3. Click **Schedule Job**.
4. Click the **Schedule this job to recur as follows** radio button. Set the period for the recurring job.
5. Check the **Notify via email upon completion** checkbox and enter a valid email address. To email the report as an attachment, check the **Email the Report** checkbox.
6. Click **Finish**. **Note:** Navigate to **Reports>System Admin>Recurring Report Jobs** to access recurring reports. Recurring reports may be edited or deleted.

## **ADDITIONAL NOTES:**