DISTRIBUTED LEARNING SYSTEM

User Handbook for The Learning Management System

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Signature / Date

COL Sharon L. Holmes
DLS Project Manager

11846 Rock Landing Drive, Newport News, VA 23606

Learning Management System

Preface

The Army Learning Management System (LMS) provides a revolutionary methodology for the implementation and management of individual training, whether in residence or via distributed learning, anytime, anywhere.

Everyone in the Army, soldier and civilian, has a role, as well as a stake, in the successful implementation and assimilation of the LMS.

This Handbook, along with a Training SOP and Training Simulations (vignettes) provides the scope and details necessary for you to understand and fulfill the responsibilities of your role(s).

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LEARNING MANAGEMENT SYSTEM

Chapter 1

Introduction

LMS INTRODUCTION

Welcome to the Army Learning Management System (LMS)
Of the
Distributed Learning System (DLS)!

Introduction to the Learning Management and Distributed Learning Systems

Welcome to the Army Learning Management System (LMS) of the Distributed Learning System (DLS). The DLS, formerly known as The Army Distance Learning Program (TADLP), supports the Army's goals for Assignment-Oriented Training (AOT), Life Long Learning (LLL), and leader development concepts of Army transformation by supporting soldier and civilian self-development training and education. The delivery of training and education at any time (24/7), anywhere allows soldiers and civilians to update the skills and knowledge necessary to operate in a full-spectrum, operational environment.

The LMS—the heart of the DLS and the major artery of TADLP—provides hardware, software, and security for automated student administration, management, and scheduling. It also includes automated courseware distribution and storage, a student and instructor collaborative capability and the establishment of interfaces with major Army training and training management systems. With the deployment of the LMS, we now have a standardized, individual training methodology.

A team of personnel with specific roles who sometimes have overlapping functions supports the LMS. Like the different players on any team, their role or functions must be accomplished in a coordinated, accurate, and timely manner to make the system work

Handbook Organization

The LMS Handbook is organized into 10 chapters where the basic information for each role is found. These chapters cover basic LMS navigation as well as the functions, activities, processes, and privileges attributed to each of the various LMS roles. Additional information is found in the appendices and glossary in the back of the handbook. As you become more familiar with your role(s), you will understand why, how, and where you interact with other LMS roles that operate both inside and outside the LMS. (See Appendix A for a description of all LMS roles)

The handbook provides step-by-step instructions to perform the functions associated with each role. However, the handbook is not a stand-alone document; rather it compliments the information found in the LMS Training Vignettes and Training SOP. Collectively, these three informational sources furnish the "how-to" and details necessary to become familiar with, learn and perform your assigned role(s) in the LMS environment.

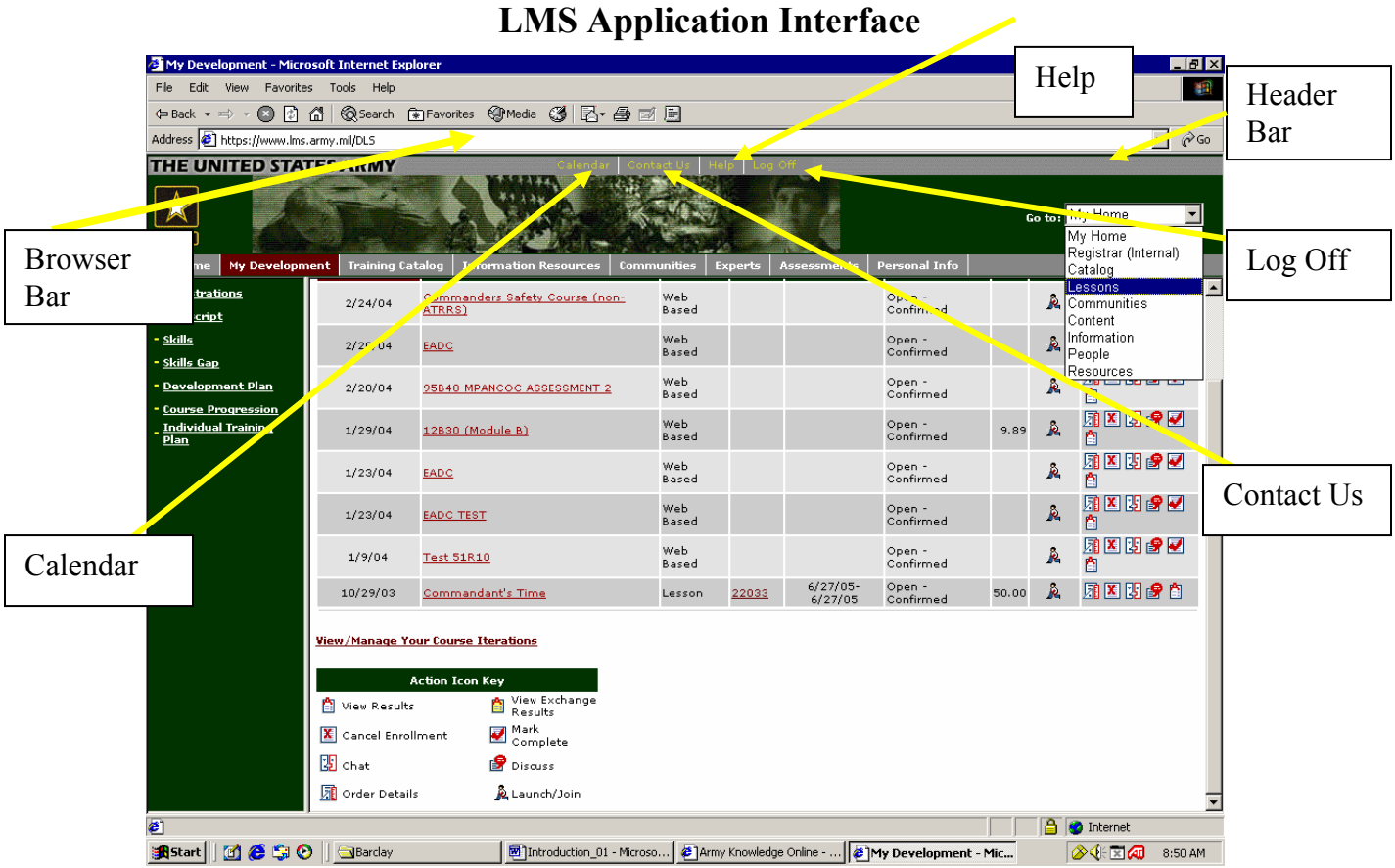
Clarification of the contents of the handbook or recommendations for change can be obtained or made by calling the DLS Help Desk at 1-877-251-0730. This handbook is in Portable Document Format (PDF) so that you can easily access, search, and print its contents**.**

Note: The entire Handbook is quite large and you may wish to only print the chapter(s) and appendices that pertain to your role(s).

Getting Started - Using the LMS Application Interface

The LMS Interface contains a number of different objects that will contain pertinent and useful information as well as links that will take you to other portions of the LMS. The Interface includes every screen you will see while navigating through the LMS. This ranges from your Homepage to pop-up windows and from drop-downs to action icons. The illustration below highlights the terminology that you will encounter upon entering the LMS. The illustration below is followed by descriptions of each item.

LMS Application Interface

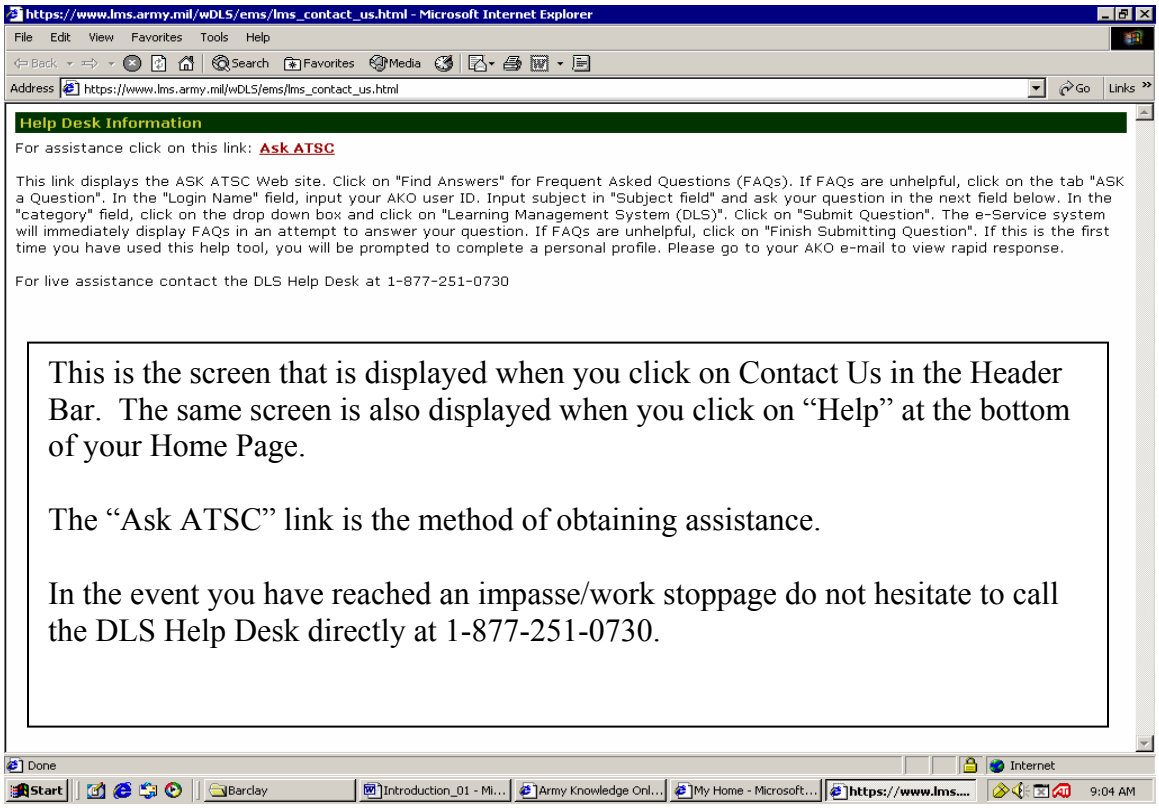


Browser Bar – A standard Internet browser feature that allows you to navigate to other locations on the Internet.

Header Bar – The header bar contains four links you will need as an LMS user.

Calendar: Opens up a calendar that shows your training registrations.

Contact Us: Provides a link to the Army Training Support Center help desk as shown below.



This is the screen that is displayed when you click on Contact Us in the Header Bar. The same screen is also displayed when you click on "Help" at the bottom of your Home Page.

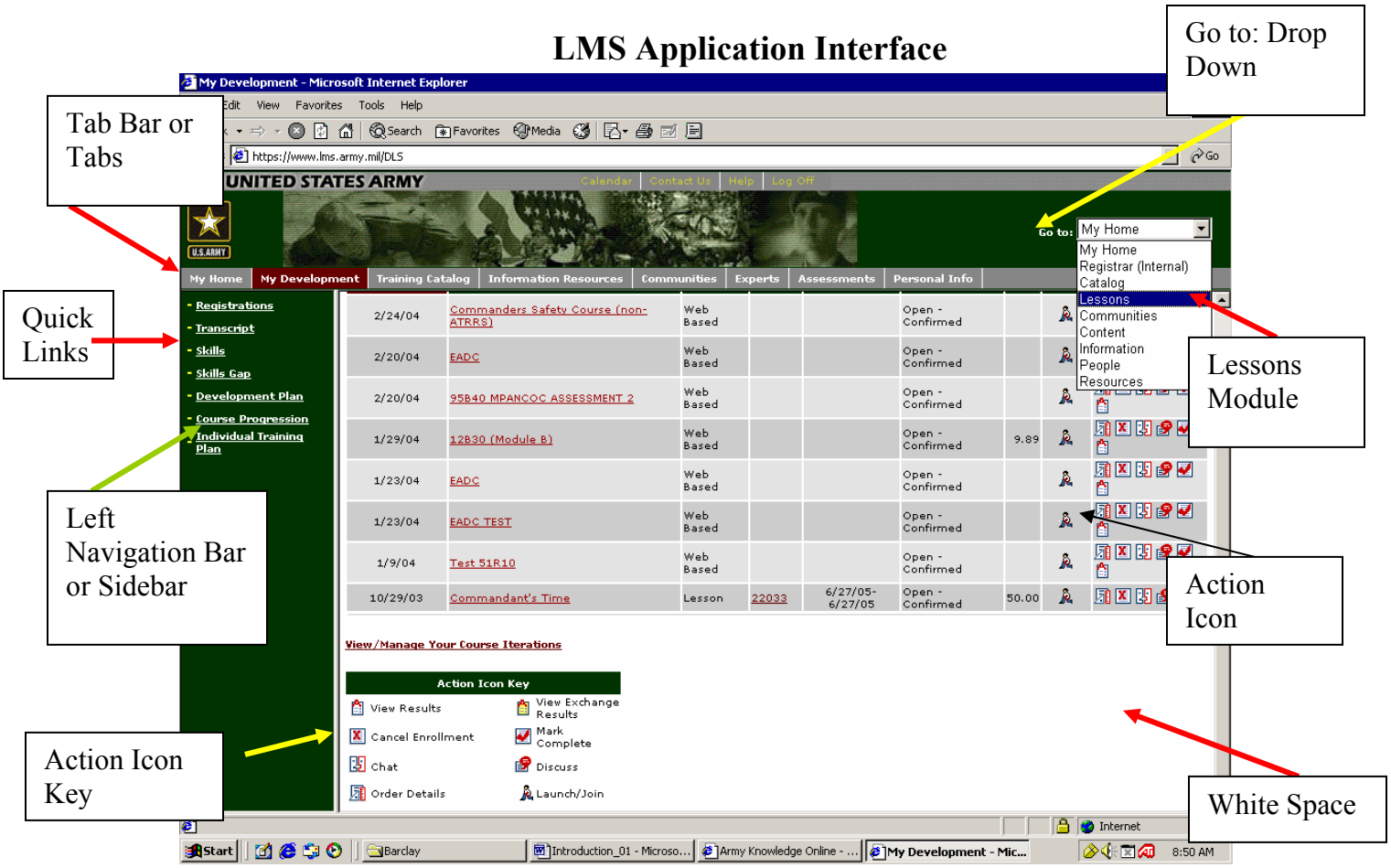
The "Ask ATSC" link is the method of obtaining assistance.

In the event you have reached an impasse/work stoppage do not hesitate to call the DLS Help Desk directly at 1-877-251-0730.

Help: Opens the LMS help file that contains training vignettes on most of the critical LMS processes, and a link to the handbook and the Training SOP. The Training SOP is a mid to high-level document that discusses how the LMS will be uniformly applied across the Army Training Community. However, in many cases a significant amount of process level detail is provided for all roles with the exception of the Learner. Please refer to the Help file screen shots found in the "Read Me First" presentation on your Home Page for additional details.

Log Off: Logs you off the LMS. Represents the correct way to exit the LMS.

LMS Application Interface



Go to: Drop Down – Contains links to the Modules (a group of related functions) in the LMS applicable to each role with the exception of the Learner. The Learner has access to only one Module: My Home, which is found in the Tab Bar.

To change between modules, select the down arrow and move your mouse to cover the module you want to go to. Drop-downs are also located elsewhere in the LMS. You will be able to identify the drop-down by the down arrow. The process for using these is the same as noted above.

Note: This use of the term Module should not be confused where it is used in reference to courses, phases and lessons.

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Tab Bar or Tabs - The location within modules designed to accomplish various functions within the LMS. For example, many modules have a Reports tab. This tab is used to access reports specific to that module.

Left Navigation Bar or Sidebar – The left navigation bar sometimes called the sidebar, is contained within Tabs. The left navigation bar contains functional links to other items within a particular tab. They vary depending on which tab you are in.

The hierarchy is as follows: functional links are located in the left navigation bar, which are contained in Tabs, which are contained in Modules.

Action Icons: Action icons are located throughout the LMS to perform specific actions. To use an action icon, simply mouse over the icon and right-click. There is a Key at the bottom of most pages where Action Icons are located.

Mouse-Over: The LMS allows users to mouse-over many items in the LMS. Doing this will prompt the LMS to display a text box. Sometime this will simply restate what you have moused-over, but may contain additional or clarifying information.

White Space: Refers to an area where your search results are displayed. It also contains data entry fields for various functions as well as instructions on performing functions.

Time Zone: The LMS defaults to Eastern Standard Time. Since users can be found in every time zone you need to keep in mind that things like your **Notices** and **Calendar** will reflect the time zone you have set on your Home Page.

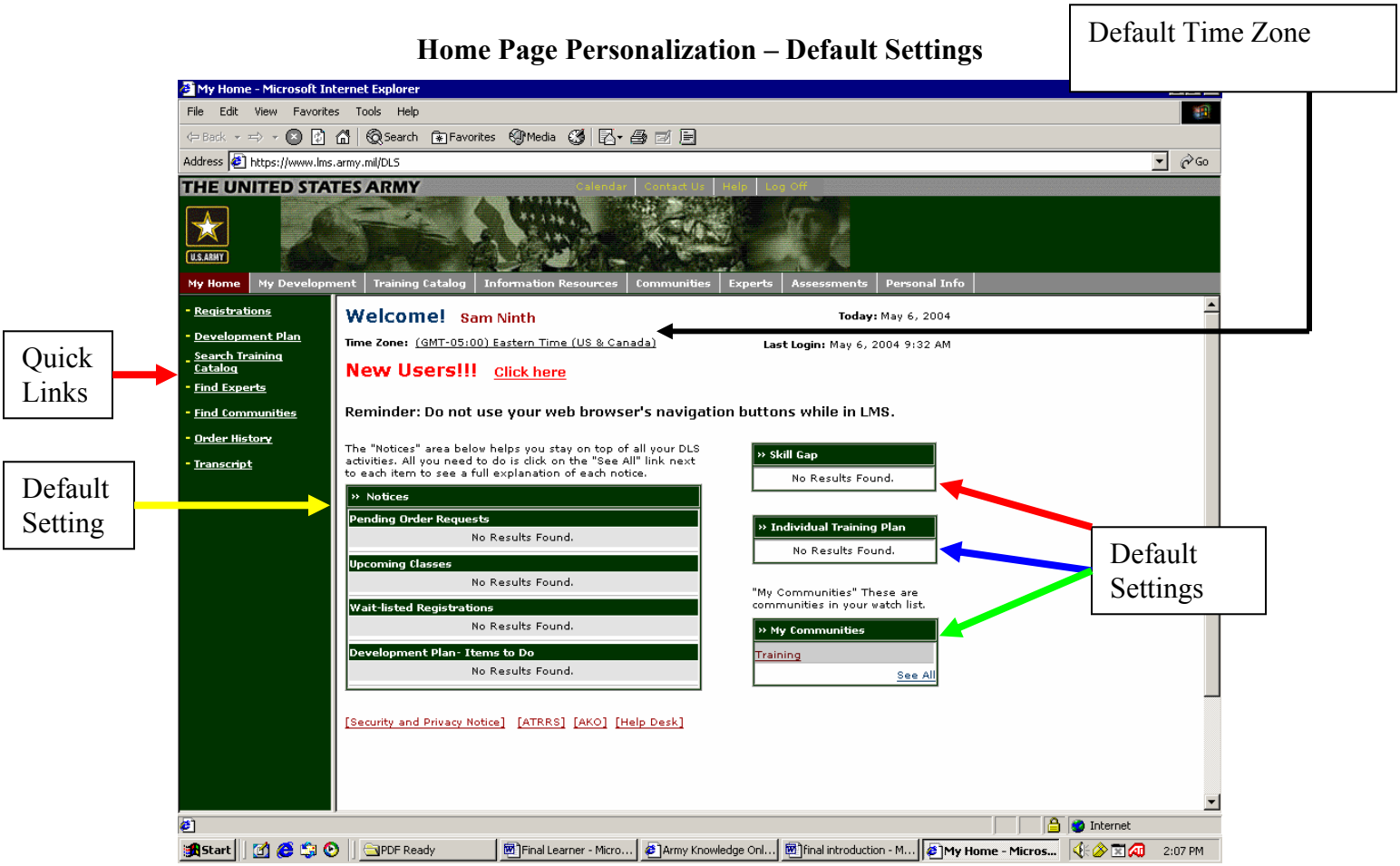
Navigation Tips: Listed below are some useful tips to assist you in using the LMS.

Opening multiple windows	For example, to have both the LMS and the Handbook appear on the screen at the same time, resize their windows to show a much of each as you prefer. To resize a window: click on the 'restore down' icon in the upper right hand corner of the screen. Click and drag window edges or corners to get them the size and location you want. This holds true for other windows as well.
Navigating Back	Whenever available, use the "Back" buttons in the LMS application. The Internet Explorer or Netscape "Back" buttons do not always support the LMS functionality.
Search Criteria (General rule)	Most every, if not all, search options have more than one criterion that can be used to conduct a search. The more you can enter will narrow the scope of and time required to conduct your search. However, if you are not sure, you can in many cases just click the GO button and the LMS database will return all the records available for the type of product you are looking for. Keep in mind that this may take more time so be prepared to wait a little in some cases.
Adjusting the Font Size	To change the font, select "View" from the internet tool bar, scroll to "Text Size" ("Text Zoom" in Netscape), and choose the size you want.
Maximize Screen Area	In some cases control boxes ("Go", "Save", "Edit", etc. may not be

	visible without using scroll bars. To maximize the available screen area, click "View" in the browser toolbar, and then click "Maximize". This will hide the toolbars until you move the cursor above the top edge of the window at which time the toolbar will reappear.
Mandatory Data Entry Fields	They are always highlighted in red and must be completed.
LMS search options	In many cases the highlighted option is always the inactive link. (i.e. Search Training Catalog by "Full Catalog" or "Lesson Only"
Stay on the Path	As you navigate through the LMS, you will notice many active links that are associated with each module and tab. Unless directed by the steps in the Handbook, Training SOP, or vignettes, we recommend that you do not open them en route to performing a specific task or process.

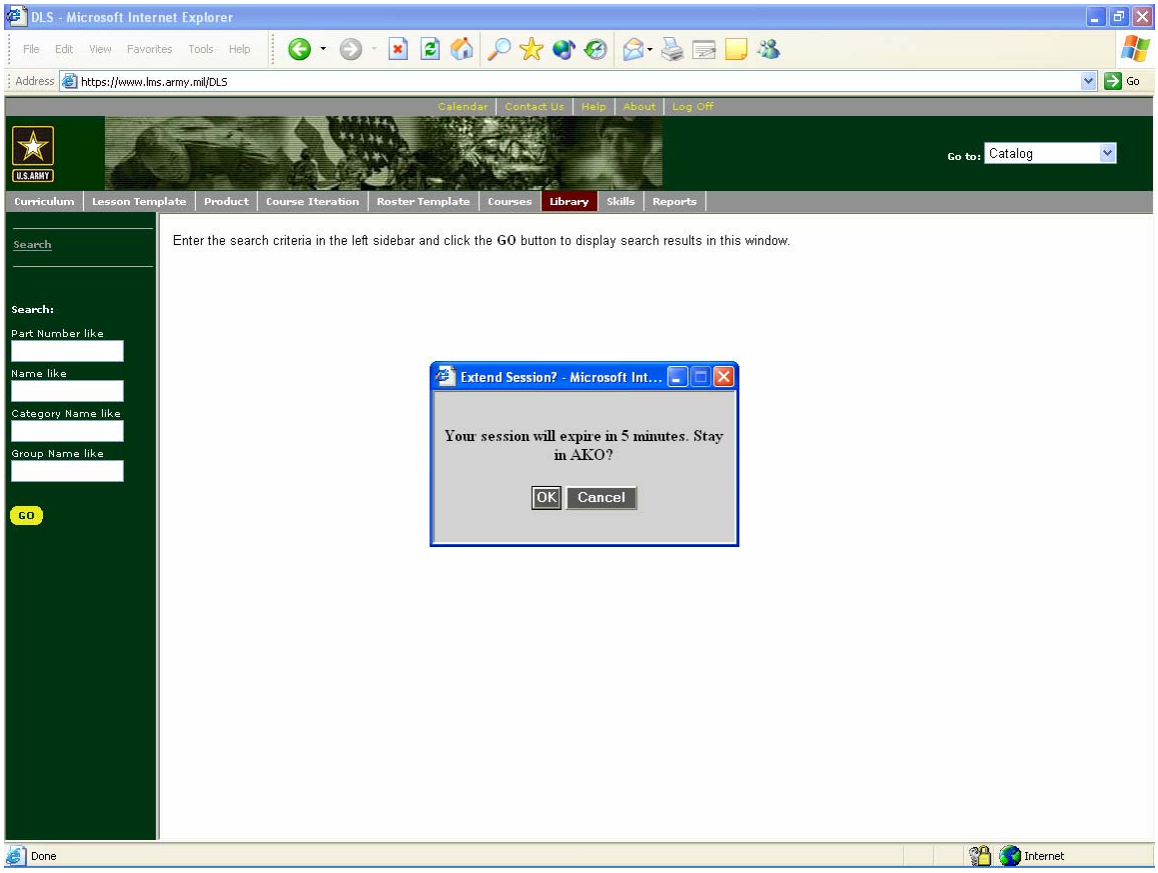
One final navigation tip: There are, in several cases, multiple routes or links that lead you to the same function. For example, while searching the **Training Catalog** you will encounter a link to Register for an item (product) you have found. The Registration link is also found in the **My Development** tab on the Home Page, and is a Quick Link (short cut) in the **Left Navigation Bar** on the Home Page. Current Quick links are default settings that can be personalized, but only for the Home Page.

Home Page Personalization – Default Settings



Warning

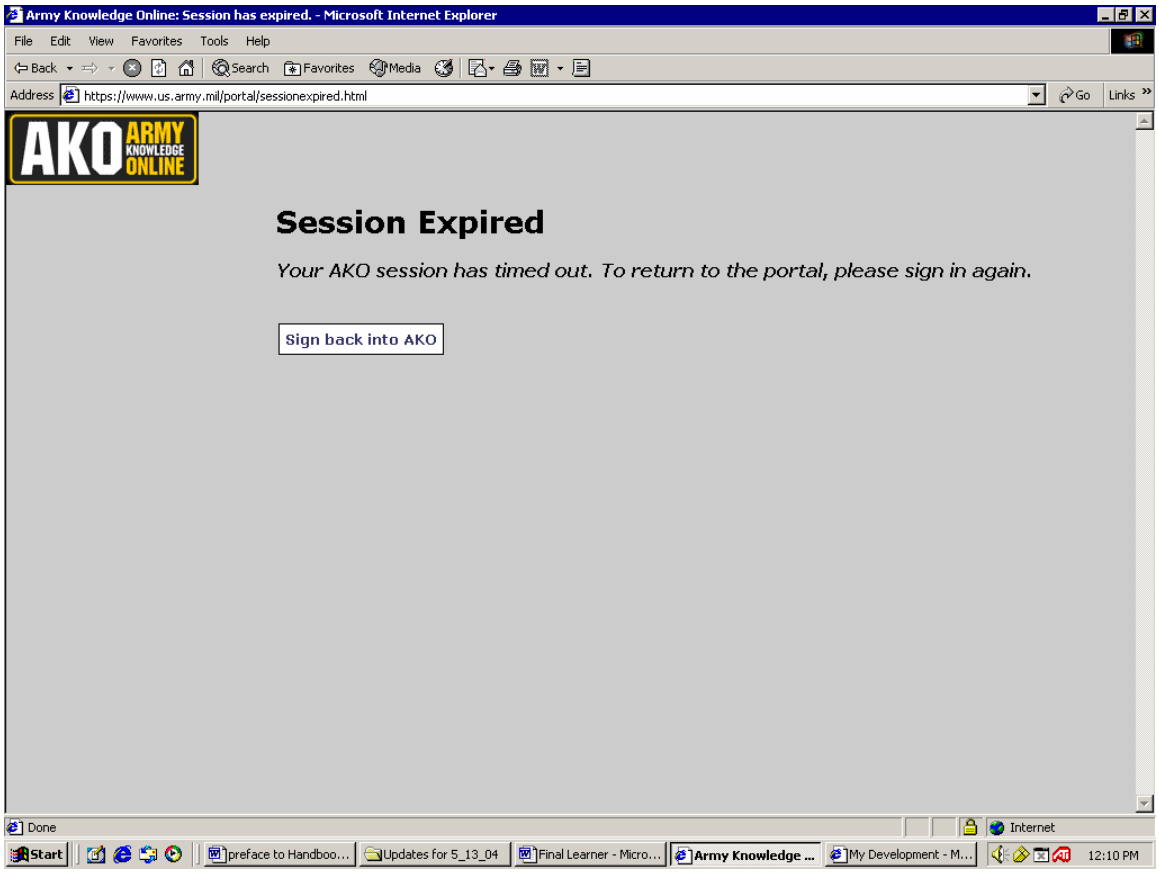
A word about Army Knowledge Online (AKO)



Once you log into the LMS from the AKO **My Training Center** link, AKO is still "open," but it does not see any activity. The lack of activity will result in this warning message: **"Your session will expire in 5 minutes. Stay in AKO?"** You will be offered the opportunity to select **"OK"** to continue or **"Cancel"** to terminate your AKO session**.**

If you still are working in the LMS you need to select **"OK".** If you do not you will get the message above and have to log back into AKO and the LMS. Depending upon what you were doing at the time you could lose data and have to begin the last function or process all over if you had not saved your input.

If you should fail to see the message or do not elect to continue your AKO session by clicking the **OK** button in the previous screen, then you will see the following screen when you return to the AKO screen. Should you wish to re-enter the AKO website, simply click the "Sign back into AKO" button on the "Session Expired" screen. (See figure below.)



Note: The LMS application (SABA) is a COTS (commercial-of-the-shelf product) that has been modified to meet Army training and training management functions. It is not a custom-designed, government-proprietary software and, in some cases, contains terms which relate to its commercial use. If you are not sure of any term, please consult the Glossary or the Training SOP.

LEARNING MANAGEMENT SYSTEM

CHAPTER 2

LEARNER

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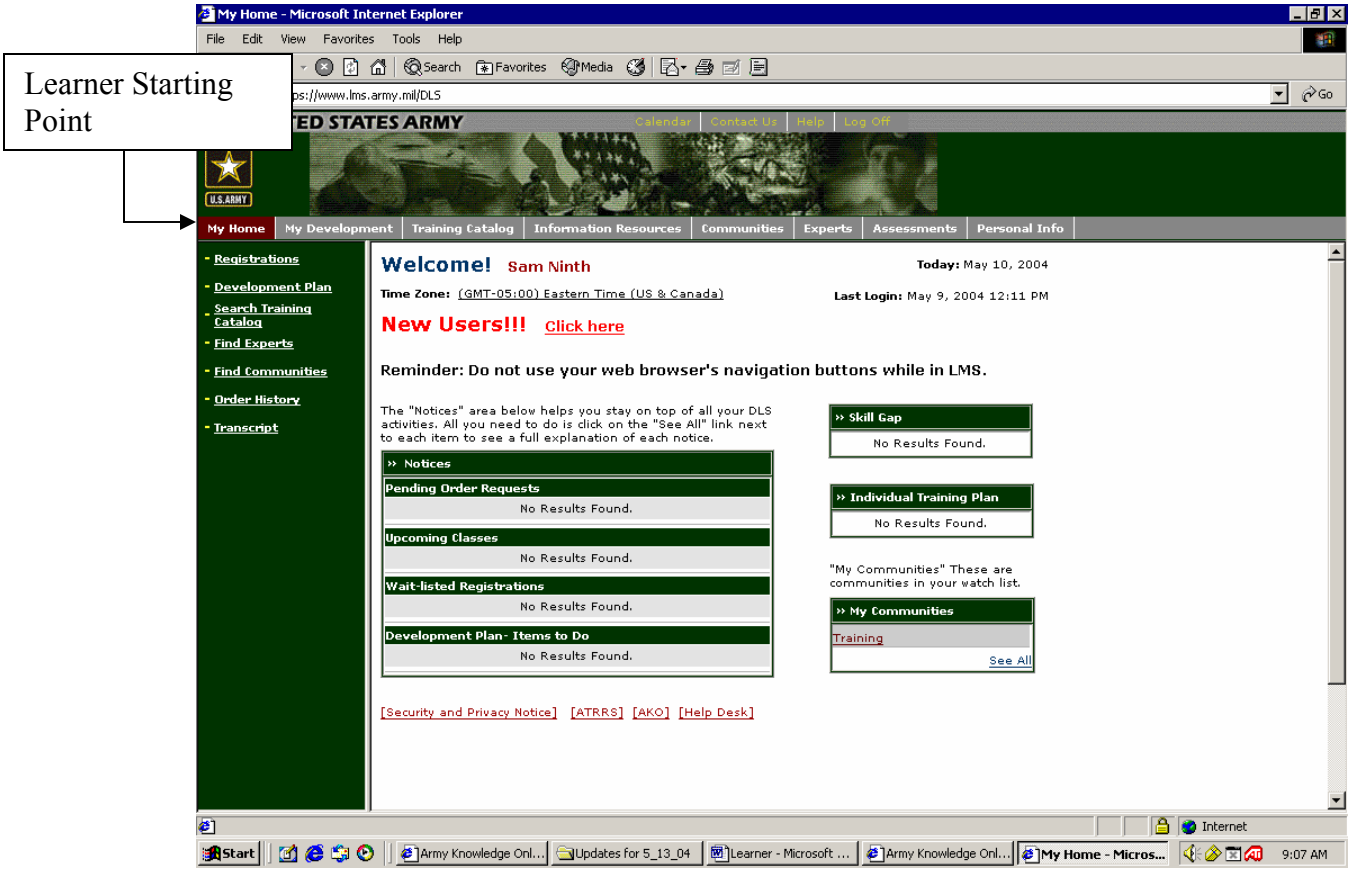
Learner Functions within the LMS

Everyone in the Army, both military and civilian, is a Learner. Supporting the Learner from inside and outside the LMS are several other roles that are outlined in Appendix A. In order to understand the LMS and support the Learner, these other roles, in addition to the Learner role, **must** begin here in order to understand the common or core LMS functions.

The Starting Point



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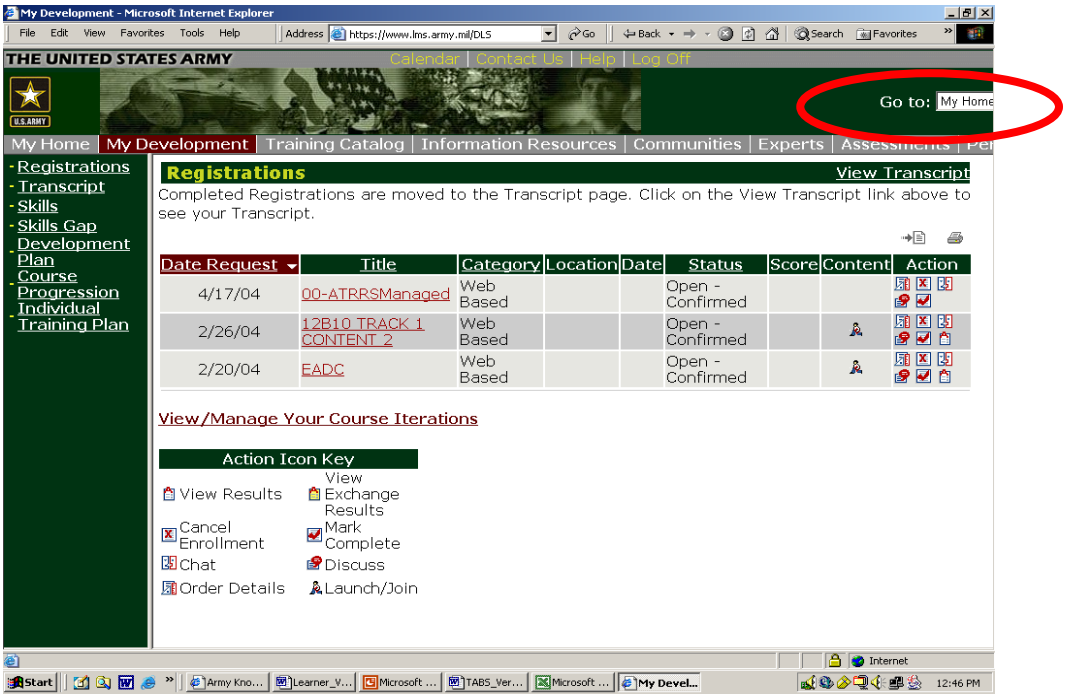
An Important Note about the Modules

As the table on the following page shows, the Learner role has a single module only, **My Home**. All other roles have additional modules, but all roles include the basic **My Home** module. For all but the Learner, who will not see this drop-down box on his or her screen, the various modules are accessed via the **GO-TO** drop-down box (see figure below) found at the upper right of the LMS screen. Therefore, those who have the Learner role only are asked to ignore all references to the instructions in this chapter that refers to the **GO-To** drop-down box, and begin with the second step in the applicable instructions. For all other roles, you will need to return to the basic Homepage screen as you go about your duties to perform such functions as identifying which communities you decided to include in your watch list. To do so, you will simply select the My Home option from the **GO-TO** drop-down box.

The common or core functions, with few exceptions, are not repeated in subsequent chapters of the LMS Handbook.



In this chapter, you will build on the functions that you learned in Chapter 1 to obtain a greater understanding of the LMS and the system functions you will use in the role of a Learner. Listed below is the only module that is accessible in the LMS for the Learner role, together with the Tabs (from the Tab Bar), associated with that module, and the links located in the left navigation bar associated with each Tab. This Chapter along with Chapter 2 is the foundation for all LMS roles. Therefore, it is imperative that you understand its contents before using the LMS and/or proceeding to the chapter that covers your additional role(s).

MODULE	TAB	LINK
My Home This module (the default module for all users) allows you to view your training information including transcript and registrations as well as search the catalog and launch collaboration functions.	My Home	Registrations Development Plan Search Training Catalog Find Experts Find Communities Order History Transcript
	My Development	Registrations Transcript Skills Skill Gap Development Plan Course Progression Individual Training Plan
	Training Catalog	Search (Full Catalog & Lesson Only)
	Information Resources	AKO link
	Communities	Communities of Practice Personal Communities Q & A People Online Search
	Experts	Find Subject Matter Experts Communities in which I am an Expert Search
	Assessments	Critiques

MODULE	TAB	LINK
	Personal Info	Main Information Lesson Requests Job Profile Personalize Catalog Personalize Homepage Search (Order History)

Before You Begin

Please attend to these few housekeeping matters before using the LMS for the first time. They are intended to make your training experience a rewarding one, as well as to avoid unnecessary disruptions in your training activity.

Changing Browser Settings

Changing browser settings is a task that is performed outside of the LMS system. It involves configuring the default settings in the browser such as font, security, etc.

1. Open the Internet browser. Select the Internet Explorer icon "e" or Netscape logo, as appropriate, in the task bar at the bottom of your screen. You may also click on START, PROGRAMS, and INTERNET in succession.

2. Click on TOOLS in the task bar menu at the top of the screen.

3. Click on INTERNET OPTIONS in the drop-down menu.

4. Click on the GENERAL tab.

5. Set a Web page to use as your Home page, the number of days to keep Web sites you have visited in the History folder, and the font and color that text will be displayed in. You can also view the files and cookies that are maintained in the temporary Internet Files folder by clicking on Settings under Temporary Internet files. You can choose to delete these files.

6. Other tabs allow you to set the levels of security and privacy for your computer.

7. Click on OK when you have finished returning to your browser's opening screen.

Accessing the Learning Management System (LMS)

You access the LMS by first logging into Army Knowledge Online (AKO) using your AKO user name and password. A link in AKO will take you to the LMS. Upon successful authorization and logon, the system displays your Homepage.

To access the LMS:

1. Log into Army Knowledge Online (AKO), using this URL:

   https://www.us.army.mil/

2. Click "My Training" in the Self-Service column (left side of screen), which bring up the "My Training Community Page".
3. Locate "My Training Center" in the middle panel of the page, and then click the "Visit Your Training Center" link in that box.

If you are not authorized to access the LMS or if access is unsuccessful, a page will be displayed, directing you to the LMS Help Desk. If you are successful, the first screen you see in the LMS is called your Homepage. Everyone can customize this page to display his or her personal information contained in the LMS. See "Personalize Your Homepage" several paragraphs below to discover how to do this.

To Log Off the LMS and AKO

Click the Log Off link that appears at the top, right of any page. This action closes your LMS page and returns you to the AKO website. Remember to click the Log Off link at the AKO page, as well, to log out of AKO. This link is also located at the top, right of the AKO window. Answer "Yes" to the pop-up question asking if you want to close the window. Doing so will close your browser.

View Personal Information

The LMS contains information about you such as your name, address, phone number, e-mail, Military Occupational Specialty (MOS), rank, manager, location, and username. Changes to this information can only be made through AKO. After a change in AKO, the information in the LMS automatically updates on your next login.

To view your personal information, follow these steps:

1. Click the Personal Info tab. (If your role is not that of a Learner, you must first select My Home from the **GO-To** drop-down list).
2. Click the Main Information link in the Left Navigation Bar, which displays the "Main Information" window. There you will see such information about your account as rank/title, first and last name, username, manager, telephone number, etc.

To correct any misinformation in your profile, please contact the AKO Help Desk.

Personalize Training Search

The LMS provides the option to personalize searches in the Training Catalog according to the following search criteria:

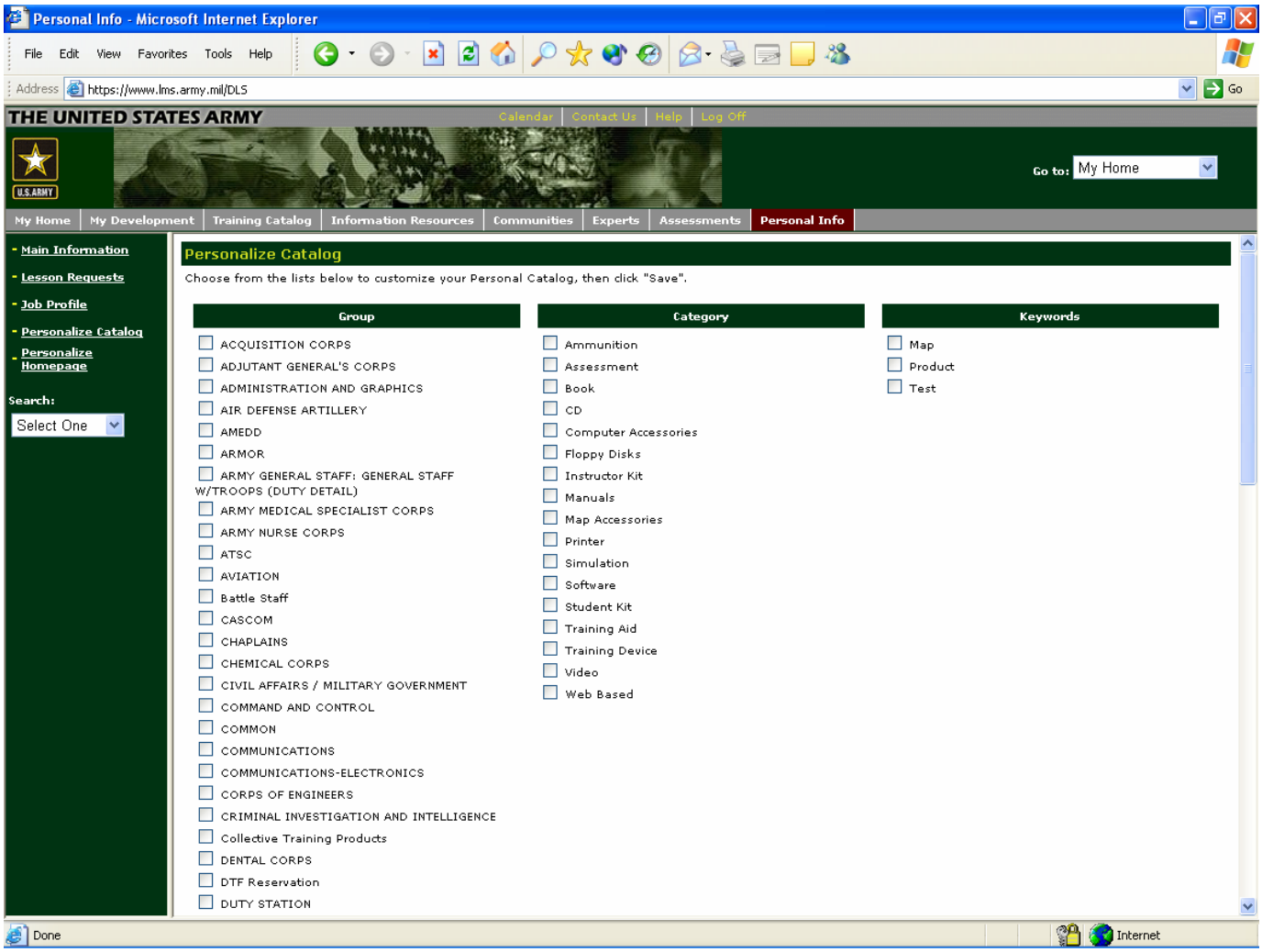
- Product Name (need information)
- Group (Organization such as CASCOM, Transportation Corps, etc.)
- Keywords (Items such as test, map, product, etc.)
- Category (Products such as simulations, books, CD-ROMs, student kits, etc.)

You can then store your personalized search criteria so that you do not have to recreate the search each time. This is beneficial if you perform similar searches many times. It can be a time-saving exercise to eliminate entering the same criteria for each search you perform.

To Personalize your training search:

1. If you do not have the Learner role, select My Home from the **GO-TO** drop-down box.
2. Click My Home tab.
3. Click on the Personal Info Tab
4. Click the Personalize Catalog link in the Left Navigation Bar.

The Personalize Catalog screen is now displayed for you to choose which options you wish to have available to you. You select the ones you want simply by clicking the check box to the left of the item you want to include in your searches of the catalog for every search. To "unselect" an item (that is, discontinue the item from the automatic search criteria), simply re-click the check box to remove the check mark. Be sure to click the "Save" link after you have made your selections to activate them; otherwise the new selection will not be effectuated. See figure below that displays the "Personalize Catalog" screen.



Personalize Your Homepage

After a successful login, your Homepage will be displayed. The LMS permits you to customize your Homepage. You would customize your homepage if you wanted to view certain information every time you accessed the LMS, wanted certain links on your homepage, or simply wanted to re-arrange how it looked. Until you are very familiar with how the LMS functions and the scope of your role, we recommend you do not change the default settings that currently appear.

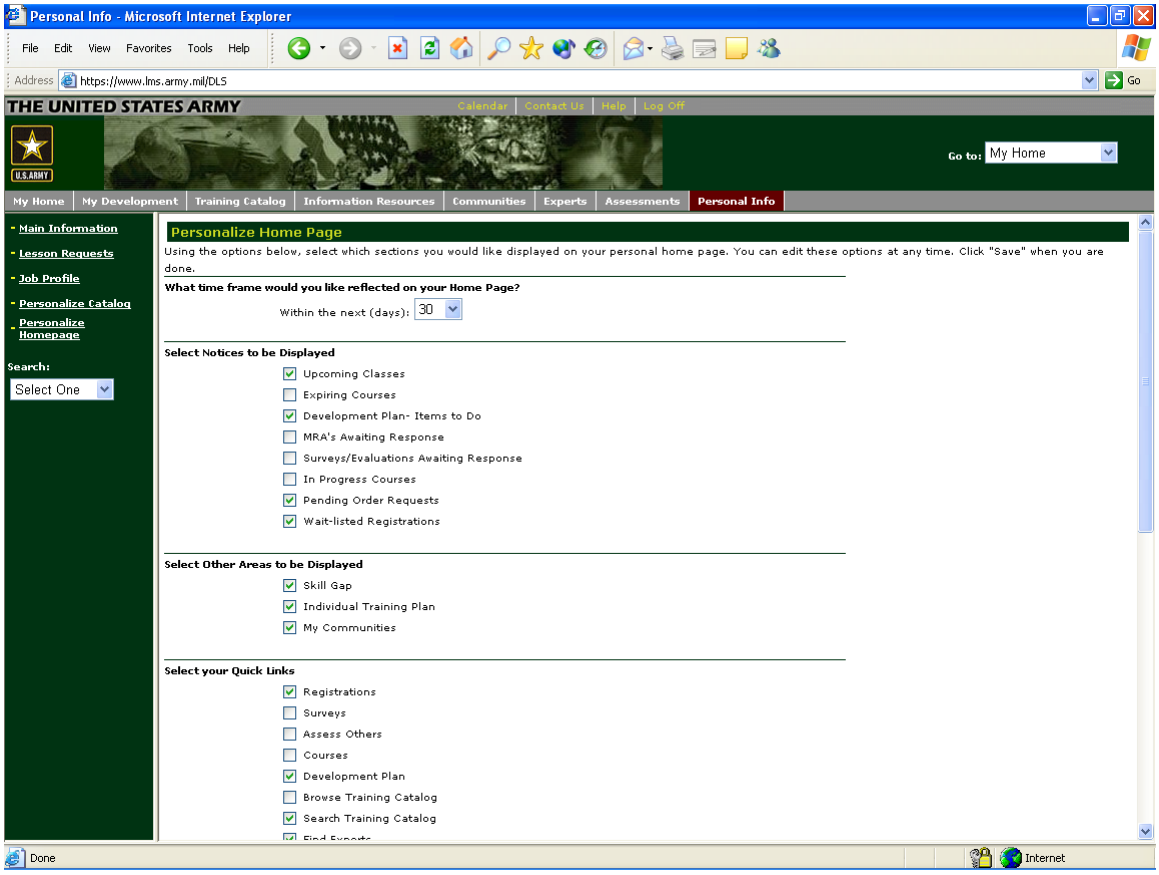
To personalize your homepage:

1. Click the "Personal Info" tab, then the "Personalize Homepage" link in the Left Navigation Bar. The Personalize Home Page screen is displayed. (See figure below.)
2. Use the "Within the next (days)" drop-down list at the top of the window to set the number of days into the future you desire to see of the activities you selected

to see whenever you access your Homepage. Entering 60, for example, allows you to see your waitlisted registrations for the next 60 days.

3. In each section, click inside the check box next to the notices and topics you want to display on your homepage. To remove an item from appearing on your Homepage, simply remove the check mark by again clicking inside the box that corresponds to the item you want to remove.

Select the time frame you want your settings to show on the homepage. This is your Planning Horizon. A setting of 30, for example, will show you all the wait listed courses you currently show in the LMS going out for the next 30 days.



The following chart describes the options available with each check box:

Notices

The following check boxes can be selected for notices to appear to you from the LMS:

Notices	Appears For	Effect

Upcoming Classes	Learners	Shows future classes you are registered for.
Expiring Courses	Learners	Shows courses that are expiring in the near future.
Development Plan - Items to Do	Learners	Shows learning items you have placed in your development plan.
MRA's Awaiting Response	Learners	Shows MRA's waiting for your response. Click the See All link to view a complete list of MRA's.
Surveys/Evaluations Awaiting Response	Learners	Shows surveys and evaluations waiting for your response. Click the See All link to view a complete list.
In Progress Courses	Learners	Shows your courses with a status of "In Progress". Click the See All link for a complete listing.
Pending Order Requests	Learners	Most current pending orders are shown. Click the See All link for a complete listing.
Wait-listed Registrations	Learners	Shows the course registrations for which you are waitlisted.
Approvals Awaiting Response	Team Leaders	A notice appears on the My Home tab in My Home

Other Areas

The following check boxes can be selected for other areas:

Other Areas	Appears For	Effect
Skills Gap	Learners	Lists the skills you need to acquire. Click the See All link for a complete listing.
Individual Training Plan	Learners	Lists your Individual Training Plan and training activities needed to complete it.

My Communities	Learners	Lists the communities you have joined.

Quick Links

You use Quick Links to select the links you want to use as shortcuts. Additionally, you can enter personal Web pages and their URLs to have them all appear on your Home-page; for example, http://www.tadlp.monroe.army.mil/; http://www.dls.army.mil/, or the Army Training Help Desk Activity at https://ask-atsc.atsc.army.mil. Scroll down below the personal Web pages and click on SAVE in the lower right corner when done. The LMS returns to the opening screen. You can also click the "Personalize Your Home-page" link to provide a shortcut to this window from the opening My Home screen.

The following check boxes can be selected for Quick Links:

Quick Link	Appears For:	Effect
Registrations	Learners	Link appears in side menu on the My Home page that displays the Registrations page
Surveys	Learners	Link appears in side menu on the My Home page that displays the Surveys page
Assess Others	Learners	Link appears in side menu on the My Home page that displays the Assess Others page
Courses	Learners	Link appears in side menu on the My Home page that displays the Courses page
Development Plan	Learners	Link appears in side menu on the My Home page that displays the Development Plan page
Browse Training Cata-log	Learners	Link appears in side menu on the My Home page that displays the Learning Resources page
Search Training Catalog	Learners	Link appears in side menu on the My Home page that displays the Learning Resources page
Find Experts	Learners	Link appears in side menu on the My Home page that displays the Experts page

Find Communities	Learners	Link appears in side menu on the My Home page that displays the Collaboration page
Community Documents	Learners	Link appears in side menu on the My Home page that displays the Collaboration page
Personal Catalog	Learners	Link appears in side menu on the My Home page that displays the Learning Resources page
Order History	Learners	Link appears in side menu on the My Home page that displays the My Profile page with Order History selected in the drop-down menu
Transcript	Learners	Link appears in side menu on the My Home page that displays the Transcript page
Skills	Learners	Link appears in side menu on the My Home page that displays the Skills page
Individual Training Plan	Learners	Link appears in side menu on the My Home page that displays the ITP Analysis page
Skills Gap	Learners	Link appears in side menu on the My Home page that displays the Skills Gap Analysis page
Edit Job Profile	Learners	Link appears in side menu on the My Home page that displays the Job Profile page
Personal Communities	Learners	Link appears in side menu on the My Home page that displays the Personal Communities page
Edit Landing Page	Learners	Link appears in side menu on the My Home page that displays the Transcript page
Personalize Home Page	Learners	Link appears in side menu on the My Home page that displays the Personalize Homepage page

Personal Info	Learners	Link appears in side menu on the My Home page that displays the Main Information page
Change locale	Learners	Link appears in side menu on the My Home page that displays the Change Locale page
Team Summary	Team Leaders	Takes you to Team Summary tab in My Team
Approve Requests	Team Leaders	Takes you to Approve Request tab in My Team
View Profiles	Team Leaders	Takes you to Profiles tab in My Team
Compare Skills	Team Leaders	Takes you to Compare Skills tab in My Team
Initiatives	Team Leaders	Takes you to Initiatives tab in My Team
Ad Hoc Learning	Team Leaders and Group Administrators	Takes you to Ad Hoc Learning tab in My Team or Ad Hoc Learning tab in Registrar
Q & A	Learners	Link appears in side menu on the My Home page that displays the LMS Dialog pop-up window
People Online	Learners	Link appears in side menu on the My Home page that displays the LMS Dialog pop-up window
Communities in which I am an Expert	Learners	Links to Expert communities

1. In Select Your Personal Web Links, define links to other Web sites.
2. Click Save to lock in your selections. Failure to do so means that your selections and de-selections will not take effect.

Setting the Time Zone

Change the Time Zone by clicking the underlined time zone information below the "Welcome" message. Alternatively, click the "Calendar" link in yellow on the top horizontal navigation bar. Then, click on the desired time zone from the drop down menu in the Time Zone window. Click **GO** to complete. The system default is set to Eastern Standard/Daylight Time and will return to the default upon log out.

Class Managers and Schedulers should note that scheduling operations will reflect the time zone set by the user, not the native time zone of the location where the event being scheduled will take place.

Clicking the "My Home" menu tab at any point returns the user to the Home page.

Viewing Resource (Equipment and Facility) Calendars

Depending on usage policies, Learners may be able to schedule a seat in a DLS facility to make use of the wide area network access to training Products and information sources they provide. For DLS Facilities, Learners can contact the Manager of the DTF nearest them, who will use the LMS scheduling feature to reserve a DTF seat at the requested date and time, if they are available.

Assigning User-Defined Tasks or Lesson Activities

The Learner may create locally developed tasks for himself or herself to accomplish by using the following steps:

1. Click the "My Development" menu tab.
2. Click the "Development Plan" link in the Left Navigation Bar. This action displays the "Development Plan" screen.
3. On this screen, the Learner sees two areas: the top one for "Learning Activities" and the bottom one for "Assigned Tasks". Either of these will show records if any is outstanding for the Learner. Otherwise, "No Records Found" will be displayed in the area.
4. The Learner will click the Add button at the far right side of the screen which corresponds to the process he or she wishes to activate, either to assign Learning Activities or Tasks to himself or herself.

The Add Task screen provides fields for Task Name, Purpose, and Target Date (for completion). The LMS will complete the Assigned By and Assigned Date fields. The task can later be edited to enter a Completion Date.

Assigned user defined tasks in progress appear on the Learner's "To Do" list associated with his/her Home Page. User defined tasks are not intended to be directly tied to the acquisition of any specific Skills associated with the Learner's ITP. Users should use "Ad Hoc Learning" for awarding Skills acquired outside the LMS.

Course and Product Catalog (Training Catalog)

The Catalog functions allow you to search available learning offerings (courses, phases, modules, lessons) and products on a variety of criteria, including name, Military Occupational Specialty (MOS), skill level, and location. It provides descriptions, availability and schedule information, as well as automated links to Registration. This includes training shortfalls and knowledge gaps based on requirements and the Learner's training history.

Search Training Catalog

Your LMS homepage has a link on the Left Navigation Bar to the Training Catalog, where you can perform searches for courses, products, and lessons. You would perform searches if you wanted to register for a course, product, or lesson or view the details of the course, product, or lesson. If you have not yet personalized your searches, you will have the opportunity to do so later. You may conduct searches on Full Catalog (courses, products, and lessons) or Lesson Only from the following criteria:

Fields in Full Catalog Search	Fields in Lesson-Only Search Only
• Service/Branch • Product Number • Product Name (Course, Lesson, or Product) • Group (Organizations from drop-down menu) • Keyword (Drop-down selection) • Product Type (Media from drop-down menu) • Lesson Objectives • Wild Card Search (Initial letter(s) or blank) • Proponent Code (Code of Proponent School responsible for product) • Proponent Name	• Lesson Title (Product Name) • Lesson Template Number • Group (Organizations) • Keyword (Dropdown selection) • Location (Post or City) • Building • Start Date After (Calendar Pick Tool) • Start Date Before (Calendar Pick Tool)

Performing the Search

You can search for lessons using either the "Full Search" or the "Lesson Only" search by clicking the corresponding search link at the top of the Left Navigation Bar. If you do not specify "Lesson Only," your search results will contain all categories intermixed in the Search Results window. The LMS displays the results of your search after you have entered your search criteria in the search text box(es) in the Left Navigation Bar and clicked **GO**. The system will return the items matching your search criteria in the Search Results window. If your search returns a large number of results, you may want to refine your search by defining more search categories. Your MOS/AOC and role may limit your search results. You can view the details of the product or course, print the results of your

search, or request registration.

Searching allows you to search for education/training offerings and create registration requests. In addition, managers can search for learning offerings and create registrations on your behalf. Managers can also use the search to find items to put into learners' development plans. You access the Catalog by either of the following to methods.

1. Click the Training Catalog tab in the menu tab.
2. Click the Search Training Catalog function link in the Left Navigation Bar of your homepage.

When you access the Catalog, you may select one of the following catalog options listed below. These options can be selected by using the drop-down list in the upper left corner of the Training Catalog page. Based on the catalog options, you will have the ability to enter search criteria and click **GO** to return a set of possible matches to your search criteria. The default, and most common method of searching, will be the Training Catalog search option.

Browse the Catalog

Selecting this menu choice automatically lists catalog categories in the Left Navigation Bar. Clicking each underlined category will show subcategories that can be clicked to display the search results in the main window. Clicking the "+" and "-" symbols will expand or collapse the categories tree.

Training Catalog

This is the default choice when you display the Training Catalog page. Selecting this menu choice and clicking **GO** will display all items in the catalog. You can filter the items displayed by using the search fields in the Left Navigation Bar, which will display only items that fit the criteria you enter. You can also click the Lesson Only link at the top of the Left Navigation Bar to search only for lessons instead of the all the items in the full catalog.

Personal Catalog

Selecting Personal Catalog from the Search drop-down list will restrict the search results according to the preferences you selected when you created a personal catalog. Click **GO** to show the search results.

Course Progression

Selecting this menu choice from the Search drop-down list allows you to list courses in the search results page. Using the search fields in the Left Navigation Bar, you can narrow the search to a specific course version or to courses that are available from a certain date. Click **GO** to show the search results.

For information on adding a course to your profile, see Tab 1, "Manage Your Course Progression".

Skills

Selecting this menu choice from the Search drop-down list allows you to list skills in the search results page. You can click the skill title to see detail information and a descrip-

tion. Clicking the View All link in the Learning Suggestions column displays a list of learning items that you can complete to gain the skill at a certain level. Clicking the Community icon displays information about communities that can offer assistance in gaining the skill. Click **GO** to show the search results.

For information on skills, see Tab 2, "Manage Your Skills".

After you have executed a search based on of the above search tools, you have the option to either view the various details found or (see page 21) or "**Request Registration**" (see TAB 4). You can also search the catalog by "**MOS**", see Tab 5.

View and Manage Personal Registrations

Clicking the Registrations link in the Left Navigation Bar displays the Registrations page that shows a list of the current items that you, your Learning Approver, or your Manager have selected for you from the catalog.

This page lists all the current catalog items you have requested, but have not yet completed. (Completed products and delivered classes are moved to your Transcripts page; for more information on completing items, see TAB 7, "View Training History.) You can sort the list by clicking the underlined column heading. Some of the items have underlined terms that allow you to see information that is more detailed or to take an action.

If you have requested a class through the waitlist function, when the class becomes available, it will be listed in your registrations page. The class request must be confirmed; see your Learning Approver for more details.

Types of Items

Products

Anything that is not instructor-led is a product. Products include: Books, Manuals, Tests, Web-based Training (WBTs), CD-ROMs, etc. A product can be shippable (e.g., a manual), or electronic (e.g., launchable or downloadable WBT). If the product requires shipping, the shipping status will be modified on the Registrations page by the product distributor. If the product is launchable/downloadable, there will be action icons on the Registrations page to launch or download the product. Products can also be parts of courses, phases, or modules.

Courses

A course is a collection of phases designed to meet a large training objective. Courses are often MOS-specific, and are taught by the various Proponent Schools.

Phases

A phase is a collection of modules designed to meet a training objection within the course-training objective. The successful completion of phases will lead to the achieve-

ment of the course-training objective.

Modules

A module is a collection of lessons and products designed to meet a more general set of tasks or skills.

Lessons

A lesson is an instructor-led event designed to teach a specific task or skill. Lessons are bundled to make up courses, phases, and modules. There are two types of lessons, as described below.

Scheduled Lessons And Content

Lessons are taught by an instructor and held in a specific location. They also have a start and end time and date. Lessons can also have two types of content associated with them: content that is "trackable" and content that is not.

Trackable content is delivered in an online form and has the ability to keep track of your interactions with it and to report results. Some online content is also launchable or downloadable: either content that you launch and interact with from a network server or on the internet, or content that you download to your computer and work with offline.

Content can also be synchronous or asynchronous. Synchronous content is taken in conjunction with an instructor-led virtual lesson and your interaction with it is determined by that lesson. Asynchronous is self-paced and can be taken and finished at any time and at your own pace.

Lessons can have asynchronous self-paced content associated with them.

From the registrations page, there are a number of actions that can be taken. The list includes such tasks as canceling a registration to launching content from the registrations page.

For additional information regarding “Registration Page Actions,” please see Tab 8.

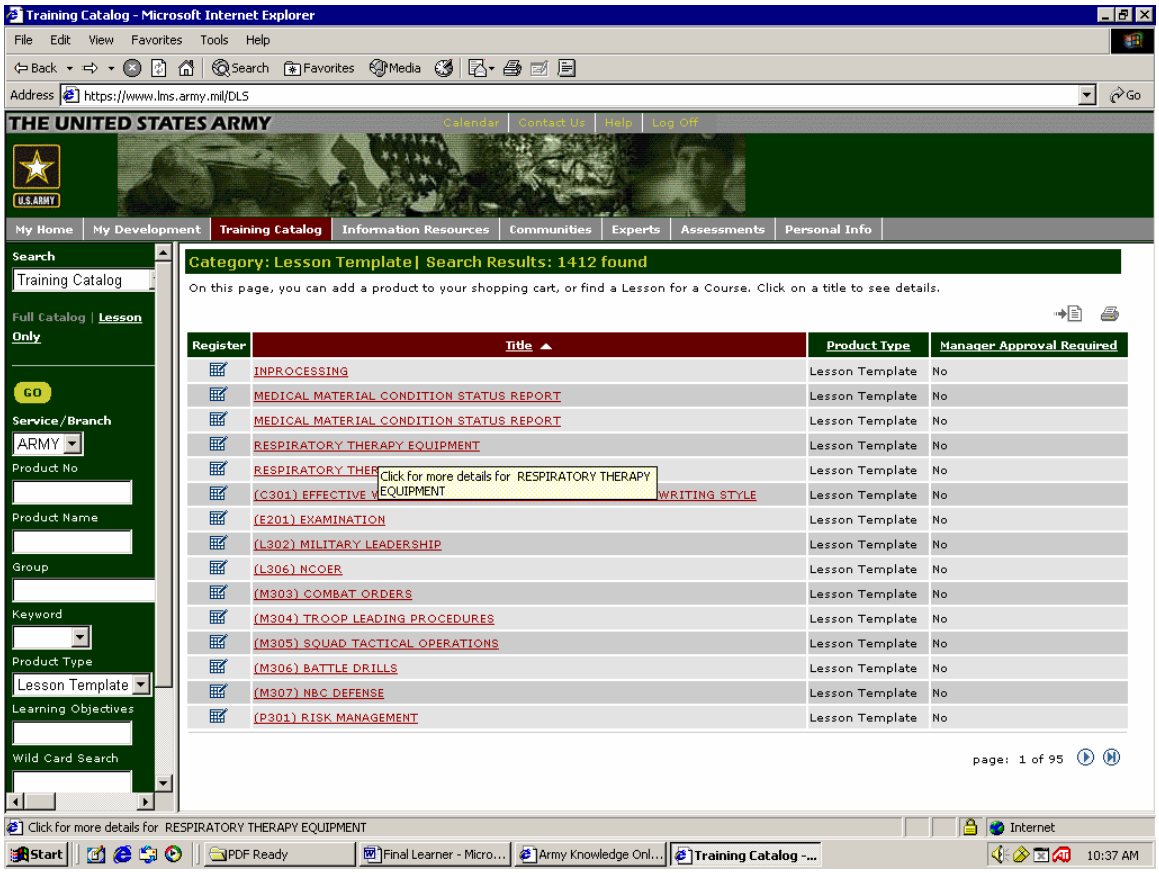
You can view product details, lesson details, or course details and personalize your training search. We’ll look at each of the three in turn, beginning with viewing product details.

Viewing Training Catalog Details

Given a successful search of the Training Catalog, it may be necessary to obtain additional information (details) of the Product (which includes courses, phases, modules, and lessons) your search provided.

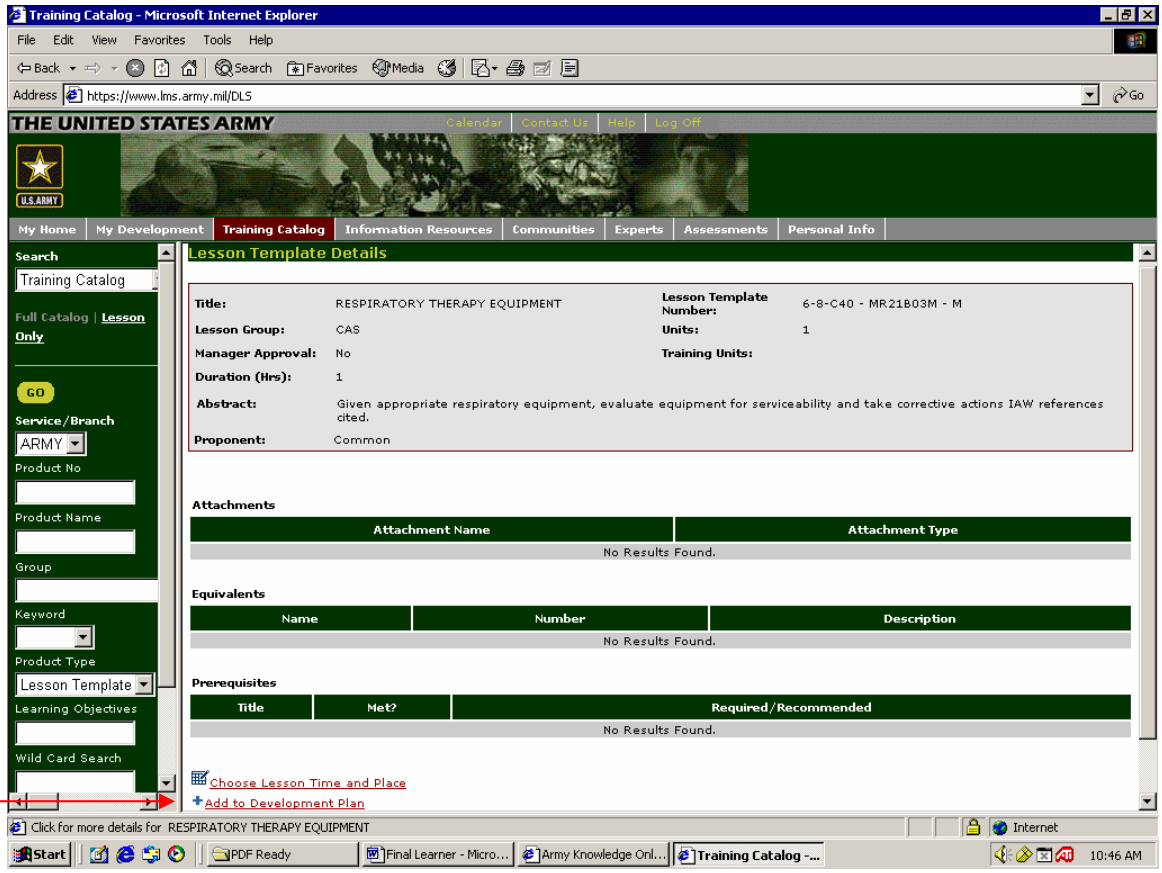
Information like: the length or duration of a lesson; if manager (Learning Approver or Unit Training Manager) approval is required prior to registration; a list all of the modules and lessons included in a course; and what requirements (prerequisites) if any, exist and must be met before starting. These and other details can be found by following the steps below.

Sample Training Catalog Search Results



To view the details of an item in the Training Catalog just **click** the title of the item under the **Title** column as shown above.

Sample Training Catalog Search Results



Information about the functions, supporting skills, and the knowledge taught, supported, or reinforced by the product above will be included as attachments to the product. Any job qualification and certification requirements addressed by the product will also be included as attachments. While viewing catalog details, you can request registration for the product or add it to your individual development plan (IDP).

:

Registration

The registration function is accessed by clicking on My Home in the **GO-TO** drop-down box (for non-Learner roles only) and then selecting the My Home or My Development tabs. The Registration functions allow registration for a course or individual product. They also provide the approval process and perform eligibility and prerequisite checks. If maximum registration limits are exceeded, the system establishes and manages wait-lists. Your functions include:

- View Individual Training Plan
- Request Registration
- View Personal Registrations and Details

View Individual Training Plan

Accessing the Individual Training Plan function is through the "My Development" tab and then clicking the "Individual Training Plan" link in the Left Navigation Bar. Alternatively, you reach it by clicking on "My Home" in the **GO-TO** drop-down box (for non-Learner roles only) and then selecting the "My Home" tab and then clicking the "Development Plan" link in the Left Navigation Bar, followed by clicking the "Individual Training Plan" also in the Left Navigation Bar. Either route takes you to the Individual Training Plan Analysis window.

The standard Individual Training Plan (ITP) for a given MOS/AOC and Career Field is accessible through the LMS. You would view an ITP if you wanted to know what learning items were required to accomplish a specific MOS/AOC or Career Field. You can use this if you are curious about a particular MOS or need to plan your learning path. The following information is available on your ITP page:

ITP DATA	EXPLANATION
Course Required	Title of course selected
Available From	First date course will be available
Valid For (days)	Number of days course will be available
Started On	Date you began the course
Target Date	Date you project to complete the course
Acquired On	Date you registered for the course
Expiration Date	Date course expires
Status	Your progression
Version	Tracking number assigned by a course manager
Community	Where you can collaborate about the course

In addition, you may be able to navigate to the course, phase, module, lesson, description, skill level, examination, course equivalents, course substitutions, and support materials. While viewing the ITP, you can request registration for a course.

Managing Your Individual Training Plan (ITP)

Clicking the Individual Training Plan link in the Left Navigation Bar displays the ITP Analysis page that shows all the courses that are required by a specified role and their statuses. You can sort the courses by role and click the community icon to find information on how to close the gap.

Note: This page does not list any courses assigned to you by your manager or that you assign to yourself. Those are displayed on your Courses page.

Request Registration

If you wanted to take an education/training activity (e.g., course or product), then you must first request registration. There are two types of processes used to achieve this:

1. To register for an ATRRS-managed course you must use the ATRRS System. Most courses are listed in the catalog. If you attempt to register for an ATRRS-managed course, you will get the message: "You must use the ATRRS to register for this course."
2. Registration for all other courses is accomplished through the LMS as described below.

There are several ways for you to request registration. You may go to the Training Catalog, select the item, and request to register for it. Alternatively, you can select an item from your ITP and then make the request. For the courses managed by ATRRS, you will be required to contact your Quota Manager. Your Unit Training Manager (UTM) or Learning Approver (LA) may also initiate the registration request.

The LMS verifies that you have met the prerequisites and any other elements of a profile established for the course or product. It also checks for availability of spaces in the course. You will be asked to confirm your reservation. If there is a physical product that requires shipping, you will be asked to confirm or change your address before any products can be shipped. (This does not permanently change your address in the LMS).

If approval is required, the LA is notified and the LMS waits for that approval. A Learner's LA is a designated member of the Learner's chain of command (for soldiers) or the Learner's supervisor (for civilians).

Once the registration request has been processed, there are three potential outcomes:

- The request is granted, you are registered for the course, and any shippable products are sent.
- The request is denied.
- You have been placed on a waitlist for future registration.

Request Registration for a Catalog Item

To request registration for a catalog item:

1. Click the Training Catalog tab.
2. Select a catalog from the Catalog drop-down list in the Left Navigation Bar.
3. Enter search criteria in the fields in the Left Navigation Bar and click **GO**.
4. Click either the "+" icon immediately to the left of a product title or the calendar icon immediately to the left of a lesson title to find an iteration of that lesson.
   - If you click the "+" icon next to a product, the confirmation pop-up window will appear and you can request the item (see the next step).
   - If you click a calendar icon next to a lesson, the Find a Lesson page appears. Click the "+" icon next to a lesson to display the confirmation pop-up window and request the lesson (see the next step).
5. Click Submit.

Requested items appear on your Registrations page.

Waitlisted Registrations

NOTE: If you register for a lesson that has no seats available, you will be put on a waitlist. You can display all your waitlisted registrations on your My Home Welcome page by selecting the **Wait-listed Registrations** check box on the Personalize Home Page.

View Personal Registrations and Details

You can view the courses and products that you have registered for (both approved and requested). This is useful to manage your time schedule and plan future training and non-training events. Registration details include:

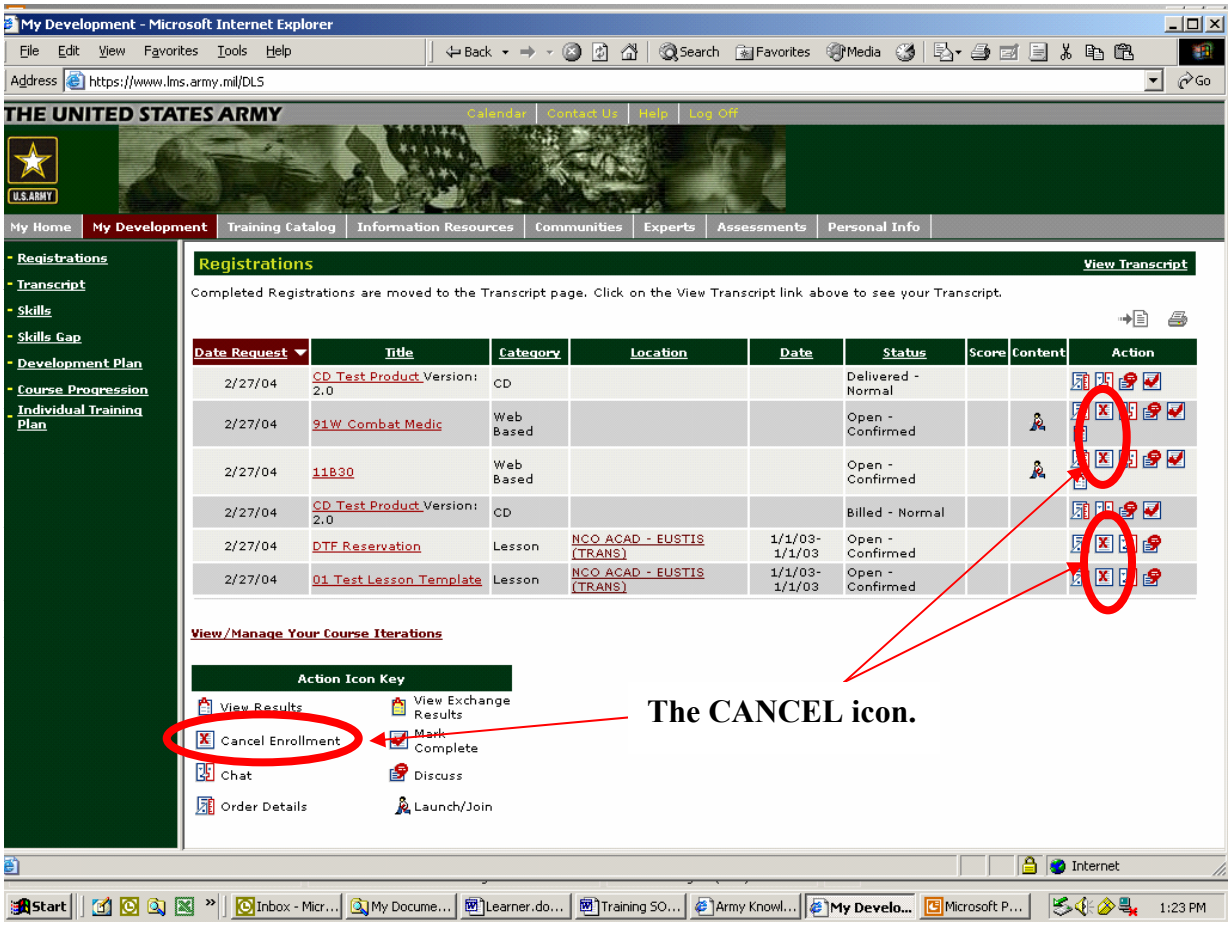
- Date of Request
- Title
- Category
- Location (for Instructor-led)
- Date (for Instructor-led only)
- Status
- Score
- Content (allows access to an online lesson).
- Action (includes canceling, launching, completing, chat/discuss, etc).

Cancel Registration

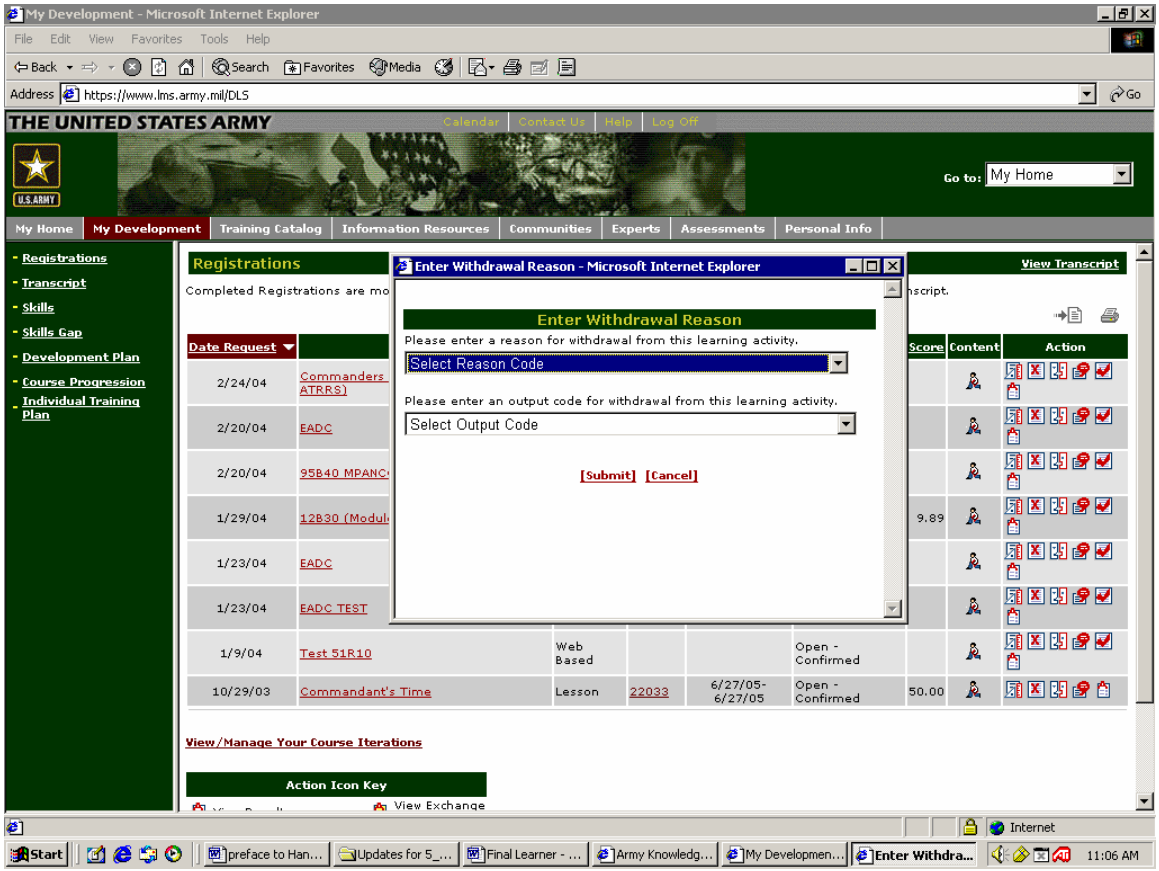
You can cancel approved registrations for self-directed courses through the Registrations page. You would cancel a registration if you were unable to attend the course or lesson. You must go through your Quota Manager to cancel ATRRS-managed courses

Before you can cancel a course or class, you must first navigate to the proper screen by first clicking the **My Development** menu tab and then the **Registrations** link in the Left Navigation Bar. In order to cancel a registration, first click the corresponding cancel icon as shown below. The LMS will then prompt you to enter 2 codes for canceling the requested learning item from pre-defined lists as shown below. This will remove the item from your registration page, but you can still view the record of the order on your Request History page. You can cancel a registration for an entire courses, phases, or modules (if non-ATRRS managed) or for individual lessons or products. You can also cancel the ordered item from the order history detail link on your Order History page.

Canceling Registration – Step 1



Canceling Registration – Step 2 (Reason and Output Codes)



Training Delivery

The Training Delivery functions provide for the crediting of Learners; delivery of electronic training; monitoring of Learner progress; and post-instruction processing (posting grades and generating completion certificates). These functions allow the Instructors to perform numerous pre- and post-instruction activities. Your functions include:

- Launch Online Content
- Mark Self-Directed Products Complete

Launch Online Content

Clicking the Join/Launch icon next to an item will launch online content, a virtual classroom, or a virtual learning environment (VLE), depending on how the item has been designed.

If the online content is not trackable, you simply interact with it. If it is trackable, it will note your interactions, and can report your success or failure in learning the content, and can mark itself "complete" when you are finished, thereby moving itself from your Registrations page to your Transcript page.

If the content is presented as a virtual classroom, it will appear in the LMS Player and will be synchronized with an instructor-led lesson.

If the lesson is a VLE, it will be presented in a window designed by the provider of the learning experience, and may or may not include online content.

Mark Self-Directed Products Complete

You must mark self-directed products, such as books, STPs, or CBTs, complete if you want them to appear in your training history. If the product has an online test, you do not have to mark it complete—it will be marked complete when you pass the test. You can mark products complete from your Registrations page. Products associated with courses or instructor-led training may not allow you to mark it complete. If you do not have access to mark a course complete, no icon will appear in the Registrations page

Registration Page Actions:

The following items can be performed on the Registrations page, which can be found in one of two ways.

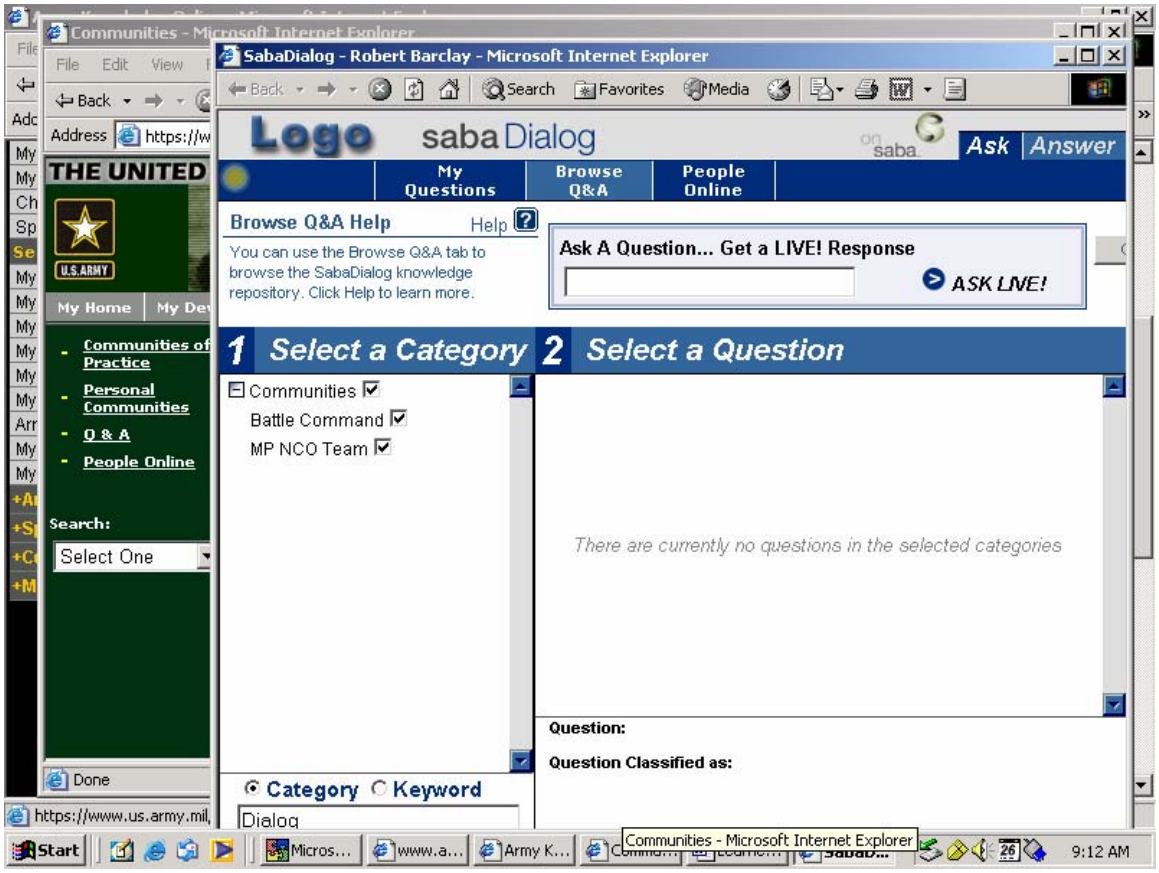
1. Click My Development tab then the Registration link in the Left Navigation Bar or
2. Click the Registrations link on the Left Navigation Bar of your Homepage

Mark Self-Directed Products Complete

If a business rule is enabled to allow learners to mark products (not courses, phases, modules, or lessons) complete, you can do so from the Registrations page. As soon as you mark an item complete, it moves to your Transcript page. Once it moves to the Transcript, you can no longer mark the item complete, even if the item has been marked as complete without success.

However, from the Transcript page, you can continue to use launchable/downloadable content, and the LMS will continue to record results for the content in the Your Transcript area. The most recent results are always displayed as the current record in the Transcript. All previous records are stored on the History page, which can be accessed by clicking the History icon on the Transcript page.

Collaboration



The Collaboration functions allow you to participate in chat sessions, threaded discussions, and community groups. A community is a place in the LMS where a group of peers can store attachments, link to URLs, and access experts for information. To access the Collaboration Services in the LMS, click My Home in the **GO-TO** drop-down menu (non-Learner roles only) and then click on the Communities tab. You can participate in any community by adding that community to your watch list either by taking part in the discussions or by becoming an expert for the community.

Your functions include:

- Search for Communities
- Participate in Communities
- Initiate and Participate in Chat
- Initiate and Participate in Discussion Threads.

Search for Communities

Searching for a community is useful for those seeking to interact with peers or experts in some field of interest or related to the subject matter of the training in which they are engaged.

Search for and Participate in Communities

To search for and participate in communities, begin by clicking on the Communities tab in the My Home module. Clicking the Communities of Practice link in the Left Navigation Bar displays the Communities of Practice page that shows you a list of communities that are associated with your MOS/Career Field, roles, skills, or courses—if any. If no community appears in the Communities of Practice page, then you will need to perform the steps to become a member of those communities in which you have an interest. See below.

To view a community:

1. In the View by drop-down list, select MOS/Career Field, role, course, or skill to search for a community associated with that group.

The Community Search Result section returns the following information if communities are found:

- Title of the returned object that is associated with a community.
- Number of communities associated with that object.

2. Click the View Communities link next to a title to display the list of communities associated with it. In the list of communities, you can:
   - Add a community to your watch list, by clicking the icon in the Add to Watch List column.

Note: If you are an expert in a community, <u>it cannot be added to your watch list</u>. Instead, the community is displayed in the "Communities in which I am an Expert" page in the Experts tab.

1. Click on the Experts tab on the Homepage
2. Click on "Communities in which I am an Expert" link in the Left Navigation Bar. This action produces the "Communities in which I am an Expert" screen, showing all of the communities with which you are currently registered, if any. If no community appears, you will need to join those in which you have an interest.
3. Click on the community you wish to access, which displays the Community Detail window.
4. Send an email to the community administrator by clicking the administrator's name in the Name column.
5. Using the Communities Actions area at the top of the page, you participate in threaded discussions by clicking the Discussion Board link or enter an associated Chat room by clicking the Chat Room link.

6. You can submit questions to experts in your field by clicking the Q&A link, which produces the SABA dialog box for you to type your queries. To learn how to use the dialog box, Click on the "Browse Q&A Help" link at the top left corner of the SABA dialog window.

Participate in Communities

When you participate in a community, you have these options:

- Chat (real time collaboration, better known as "instant messaging")
- Discussion (which is organized by topics and which maintains a record of the discussion thread
- Attachments (documents and other files added to the community which may be downloaded by the members)

While you may initiate chat or a discussion thread, the community administrator determines your ability to attach files.

Within a community, you can participate in discussions threads and chat sessions with persons in the same community. To access these, click on the corresponding links in the Community Details page.

Chat

Chat is an LMS component that allows users to instantly exchange messages. Chat rooms are available for:

- Catalog items
- Communities

Chat Rooms for Catalog Items

Each catalog item in the system has a chat room associated with it. Learners can use the Chat room instant messaging service to communicate with other learners who are registered for the catalog item.

Learners who have ordered a catalog item are granted access to the corresponding chat room once the order is confirmed. Chat rooms remain available after catalog items are completed or delivered.

Chat Rooms for Communities

Each community in the system has a chat room associated with it. The chat room for a community is available to all learners who are watching the community or are experts in the community. A chat room is available only for as long as its associated community exists.

Discussion Groups

Discussion is the LMS component that provides a persistent communication channel for interacting with other users. Discussions are available for every:

- Catalog item.
- Community.

Discussion Groups for Catalog Items

Each catalog item in the system has a discussion group associated with it. Learners can access the discussion group for a catalog item after their order for the item is confirmed. Learners can discuss any number of topics / subjects for a catalog item. Each discussion group maintains a complete history of the communication between users who participated in the discussion. Discussion groups remain available after catalog items are completed.

Discussion Groups for Communities

Each community in the system has a persistent discussion group associated with that community. The discussion group for a community is available to all learners who are watching the community or are an expert for the community. A discussion group is available as long as the community exists.

For more information about the tasks you can perform in discussion groups, see the Discussion help at Tabs 19 and 20.

Accessing Discussion Groups

There are two ways to access a discussion group:

- You can access a discussion group for every community in the system.
- You can access a discussion for a catalog item once the order for the catalog item is set to "confirmed".

Note: Discussion groups are not available for unconfirmed orders.

Accessing a Discussion Group for a Catalog Item

A discussion group for a catalog item can be accessed by learners from:

- The Registrations page
- The Transcript page

Note: You can access a discussion group for a catalog item only if the status of your order is set to "confirmed". Discussion groups are not displayed for unconfirmed orders.

To access a discussion group from the Registrations or Transcript page:

1. Click the My Development tab
2. Click the Registrations link on the Left Navigation Bar. The Registrations page displays all the catalog items for which you are currently registered.

OR

1. Click the My Home tab
2. Click the Transcript link on the Left Navigation Bar.

The **Transcript page** displays all the catalog items you have completed.

3. The Discuss icon may be displayed in the Action column, and each catalog item may have a separate discussion group. To access a discussion group for a particular catalog item, click the Discuss icon next to the catalog item in which you are interested, if one exists. If the icon does not appear, you will have to create the first group.

For more information about the tasks you can perform in discussion groups, see Discussion in Help.

Accessing a Discussion Group for a Community

To access a discussion group for a community:

1. Click the Communities tab.
2. Click the Personal Communities link.
3. Click the name of a community for which you want to see a discussion group.
4. In the Community actions row, click the Discussion Board link to open the Discussion Group window.

For more information about the tasks you can perform in discussion groups, see Discussion in Help.

Initiate and Participate in Chat

You can initiate or participate in synchronous, real-time collaboration (better known as “chat” or “instant messaging”), related to a course, product, or community. You can use the chat room to communicate with others who are registered for the course or product. Chat is also available for those who are participating in or are experts in a community. Once you are granted access to a chat room related to a course, product, or community, it will remain available even the item has been marked complete. A chat room is automatically created when the course, product, or community is created.

Accessing Chat Rooms

There are two ways to access a chat room:

- You can access a chat room for a catalog item once an order for a catalog item is set to confirmed.

Note: Chat rooms are not available for unconfirmed orders.

- You can access a chat room for every community in the system.

Accessing a Chat Room for a Catalog Item

A chat room group for a catalog item can be accessed by learners from:

- The Registrations page
- The Transcript page

To access a chat room from the Registrations or Transcript page:

1. Click the My Development tab on the top navigation bar.
2. Click the Registrations link on the Left Navigation Bar. The Registrations page displays all the catalog items for which you are currently enrolled.

OR

Click the Transcript link on the Left Navigation Bar. The Transcript page displays all the catalog items you have completed.

3. The Chat icon is displayed in the Action column. Each catalog item has a separate chat group. To access a chat group for a particular catalog item, click the Chat icon next to the catalog item in which you are interested.

Accessing a Chat Room for a Community

To access a chat room for a community:

1. Click the Communities tab.
2. Click the Personal Communities link.
3. Click the name of a community for which you want to see a chat group.
4. In the Community actions row, click the Chat Room link to open the Chat window.

Communicating with Experts in a Community

In the Community Detail page, in the list of community experts, a Chat icon is displayed next to the names of community experts. When a community expert is in the chat room, the icon next to the expert's name is active. Click the icon to access the chat room.

Initiate and Participate in Discussion Threads

You can initiate or participate in asynchronous discussion threads (or topics) associated with a course, product, or community. This form of collaboration maintains a complete history of the communication among those who participated in the discussion.

Discussion threads allow you to post messages for others to respond to. Using new or existing threads, you can communicate with others who are registered for the course or product, or who are participating in, or are experts in a community. Once you are granted access to a discussion related to a course, product, or community, it will remain available even after the item has been marked complete. Discussion threads are automatically created when the course, product, or community is created. (See TABS 19 and 20 for additional details.)

Testing

The Testing functions include providing test instructions, administering and grading tests, providing feedback, recording grades, and maintaining detailed data for later analysis. Your function is:

- Complete Tests.

Complete Tests

If an electronic test is required for a lesson, module, phase, or course, you might have to complete the test online. Paper-based tests might also be given. These are taken independently and externally from the LMS. Tests can be imbedded in online content, such as WBTs or they can be the WBT. This will vary, depending on the type of training as well as the training requirements. Once you have completed the online tests, the LMS automatically grades the tests and enters the score.

There are many ways that tests are given and completed in Army training. This ranges from paper-based tests to field exercises to tests built as a web-based application. The LMS will be used to record grades for all the different delivery types for tests. For paper-based and field exercises, they will be delivered, monitored, scored, and recorded by an instructor or an instructor representative (e.g., proctor, facilitator, or assistant instructor). Web-based (or electronic) tests will be delivered, monitored, and automatically scored and recorded by the LMS. During your training with the LMS, you will see different types of electronic test delivery types: stand-alone tests, tests as part of a lesson, and tests as part of another electronic media. You will also see paper-based and field testing, but as mentioned above, that will occur outside of the LMS.

Stand-Alone Tests

A stand-alone test is simply a "register-able" unit. Just like you would request registration for a lesson, you might have to request registration for a test. It would be listed in the Training Catalog and you would simply perform a search and request registration for the test. This test will more than likely be part of a course, phase, module, lesson, or product of which you have another registration or reservation for; therefore, the appropriate instructor, course manager, or class manager will provide you will the proper instruction for locating and completing these types of tests.

Tests as Part of a Lesson

Electronic tests may also be attached to a lesson. This means that when the lesson iteration was created, a test was made part of the lesson. When you register for such lessons, the electronic test (or content) will be automatically registered for as well. If you view the lesson details, it will say whether a test has been attached to the lesson. To complete this test, you will need to go to your Registrations page (My Development tab, Registrations link) and click the icon under the Content column for the appropriate lesson.

Tests as Part of Other Electronic Media

Tests can also be built into other forms of electronic media, such as web- and computer-based training items. In such cases, when you launch the electronic media and navigate through it, a test will be located within the media, e.g., a WBT where you had to read and view a presentation. If a test was a part of this media, you would read the required materials, then, at the end, a test would be waiting for you. You would simply complete the test based on the knowledge you had acquired and the LMS would track and record the results.

Since most tests are going to be material specific, there is no set of instructions or guidelines about how to complete them. Each test will be developed by training developers at the various Proponent Schools, each with their own set of instructions and rules. For electronic tests, there will generally be a set of instructions at the beginning of the test. Other instructions will be provided by the instructor, assistant instructor, facilitator, or proctor.

Evaluation

The Evaluation functions include creating, delivering, and recording critiques and providing for review of products and courses. Your function is:

- Complete Critiques.

Critiques

If an electronic critique is required to rate the effectiveness of an instructor, lesson, module, phase, or course, you can complete this online. Critiques may occur at the module or phase level, rather than at the lesson level. If the critique is paper-based, the Instructor, Assistant Instructor, or Facilitator will distribute, collect, and record the results in the LMS. After critique data has been entered into the LMS, the Course Managers, Instructors, and Facilitators can review the results in a simple or aggregated form.

Through critiques, collaboration administrators (and class instructors) can request your feedback on the quality of educational services and/or products you have received by rating them using critiques. Critiques are associated with a catalog item for which you are registered. The critiques link on the Assessments tab displays all the critiques assigned to you. A new critique has the status of New Request. You can accept or decline a critique.

To accept or decline a critique:

1. Select Assessments tab and Critiques link.

2. Select the Accept radio button to accept a critique, or select the Decline radio button to decline.
3. Click Submit to confirm your choice.

Once a critique is accepted, its status is changed to Confirmed and you can access the critique by clicking the critique name in the Critique Name column.

A completed critique has the status of Completed, and you can delete it from your list of critiques by clicking the Delete icon.

Transcripts

Once you complete a lesson or a product, your training history is updated on your Transcript page. Launchable/downloadable products record completion status automatically while instructors record completion status for the lessons they teach. You can view your training history to review which courses, lessons, or products you have completed as well as view the results.

When your training history contains completed products that were originally launchable or downloadable, you can still access and use the content. The LMS continues to record test results in training history. If you originally failed the test, but later complete the product successfully, your status will be updated to “successful.” If, however, you passed the test, but later while reviewing the content, fail to complete and pass the test, your original status of “successful” will not change.

View Training History

Clicking the Transcript link in the Left Navigation Bar displays the Transcript page that shows a list of all catalog items that you have completed. When you complete a course, phase, module, lesson, or product and/or it is delivered by an instructor, it moves from the list on your Registrations page to this list on your Transcript page. You can sort the list by clicking the underlined column heading. Some of the items have underlined terms that allow you to see more detailed information or to take an action.

"Completing" an item means that you have finished it. Indicating that it was completed successfully or unsuccessfully determines if you will receive competencies or other credit associated with the item. Additionally, a score or grade can be entered for completing the item. You can request and complete catalog items more than once, and each attempt will cause an update of the completion of an item. Items are marked complete initially on the Registrations page, and subsequent completion updates are made from the Transcripts page. The results of these updates can be viewed on your Transcript History page. An "unsuccessful" completion can be changed to a "successful" completion for an item, but not the reverse. This means that once an item is completed successfully, you will gain any competencies or other credit stemming from that completion, even if the status is later changed to "unsuccessful." A history of any changes is recorded on the Transcript History page.

A business rule set by the system administrator determines who can mark an item complete, determine the success of the completion, and enter scores. If you can perform these tasks, icons will appear next to the item listing. Otherwise, a manager or instructor will mark scores and update completion.

Ad hoc Learning

Learning Approvers and Managers can give you credit for learning by recording ad hoc learning events. This means they give you credit for completing a class or product, even though you never requested it or registered for it, because you have demonstrated knowledge of the material. Ad hoc events appear on your Transcript page.

Transcript Tasks

You can perform the following tasks on the Transcript page.

View Transcript Item Detail

Click an item Title link to see detailed information about that item. The information available will vary with the type of item (classes will have start and end dates; downloadable products will have part numbers).

View Update Information

Click the Updated By name link to see personal information about the person who marked the item complete or assigned a score to the item. You can send email to the person from this page.

View Transcript Item History

Click the History icon to see a list of the results from each instance when the item was either launched or when its completion status was updated.

Training Management

The Training Management function includes functions associated with the administration of the LMS. These functions range from accessing the LMS, to viewing your personal information, to running reports and maintaining databases. Your functions include:

- Access the Learning Management System (LMS)
- View Personal Information
- Personalize Your Homepage
- View Training History

LEARNING MANAGEMENT SYSTEM

Chapter 3

Facility Manager

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Facility Manager's Functions Within the LMS

In this chapter, you will build on the functions that you learned in Chapter 1 and Chapter 2 to obtain a greater understanding of the LMS and the system functions you will use in the role of a Facility Manager. Listed below are the modules that are accessible in the LMS for the Facility Manager role, together with the Tabs (from the Tab Bar), associated with that module, and the links located in the left navigation bar associated with each Tab. Modules are found by clicking within the **Go- to** drop down box in the upper right quadrant of the LMS screen.

Go-to:	Tab	Left Navigation Bar
My Home **This module (the default module for all users) allows you to view your training information including transcript and registrations as well as search the catalog and launch collaboration functions.**	**My Home**	**Registrations** **Development Plan** **Search Training Catalog** **Find Experts** **Find Communities** **Order History** **Transcript** **Note: Some learners may have more links.**
	My Development	**Registrations** **Transcript** **Skills** **Skill Gap** **Development Plan** **Course Progression** **Individual Training Plan**
	Training Catalog	**Search:**
	Information Resources	**No links – only information.**
	Collaboration	**Communities of Practice** **Personal Communities** **Create Communities** **Q & A** **People Online**

Go-to:	Tab	Left Navigation Bar
	Experts	**Find Subject Matter Experts** **Communities in which I am an Expert** **Search: Select One**
	Assessments	**Assess Others** **Critiques**
	Personal Info	**Main Information** **Lesson Requests** **Job Profile** **Personalize Catalog** **Personalize Homepage**
Resources **This tab allows you create, edit, and delete resources. Management of the resources occurs in the Catalog module.**	**Facility**	**Create** **Search**
	Equipment	**Create** **Search**
	User	**Search**
	Location	**Create** **Search**
	Building	**Create** **Search**
	Batch Resources	**Search for Lessons**
	Service Provider	**Create** **Search**
	Reports	**(See list on Main screen)**

Resource and Event Scheduling

The Resource and Event Scheduling functions allow for the scheduling of resources (Instructors, classrooms, equipment, and materials); production and distribution of schedules; and changing of schedules. Your only function is "Manage Resources".

Manage Resources

The management of resources included two tasks: creating and editing resources in the LMS and managing and viewing the schedules of those resources.

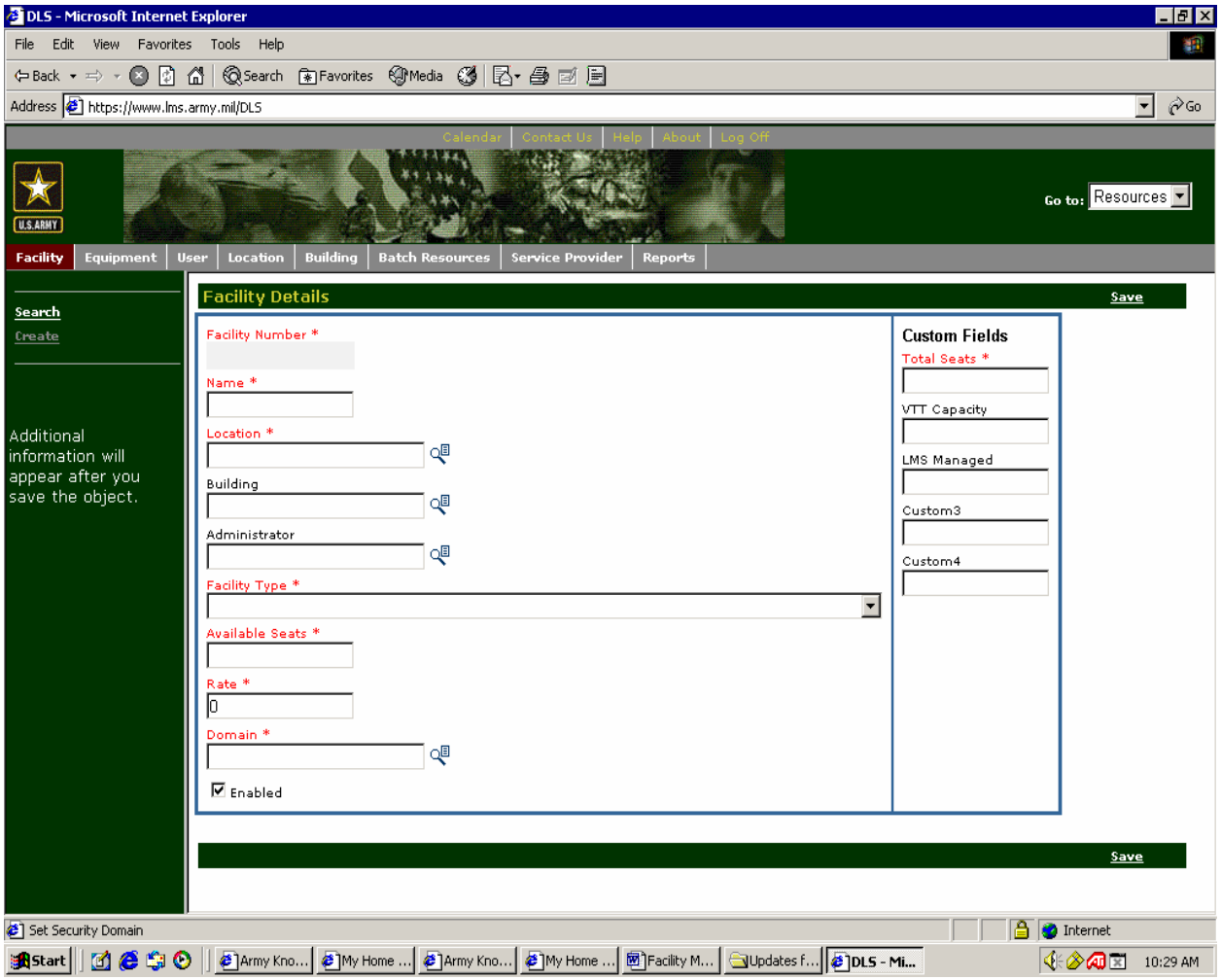
- Create and Edit Resources – This task involves the initial creation of resources in the LMS and editing those resources already created in the LMS. While some resources will be electronically loaded into the LMS, you have the ability to add additional resources as needed. Editing the resource includes changing main information, such as name of resource or point of contact, as well as adding new calendar events. You

could want too schedule a calendar event for the resource for maintenance work, downtime, etc.

Creating a Facility

To create a facility in the LMS:

1. Select **Resources** in the Go to: drop-down list
2. Click **Facility** on the Tab Bar to display the **Create** link in the left navigation bar.
3. Click **Create** to display the Facility Details screen where you can define a new facility.
4. Enter the ***required*** information needed to define the location.



Required Information	Description
Facility Number	The system provides this value after the item is created (saved).
Name	Enter a name for the facility in the Name field.
Location	Use the Finder icon to enter a location for the facility.
Facility Type	Select a type for the facility from the pre-defined drop-down list.
Capacity	Enter the maximum number of seats the facility can hold. This is information only.
Available Seats	Number available for training which is equal to or less than the Total possible seats in the facility
Rate	Enter the hourly rate (facility lease), if any, for using the facility.
Domain	Select a domain for the class facility from the pick list in the Security Domain field. If you do not enter a value for this field, the LMS uses your home domain as the default.
Total Seats (*)	Enter possible seats prior to being reserved

5. Enter any ***optional*** information for the facility:

Optional Information	Description
Administrator	Use the Finder icon to enter an administrator for the facility.
Enabled	Select this check box to make the facility available for assigning as a resource to courses and classes.
VTT Capacity (*)	Enter number of people the facility could accommodate for a VTT, which could exceed the number of fixed seats.
LMS Managed	Yes/No entry that indicates if a facility is not scheduled at seat

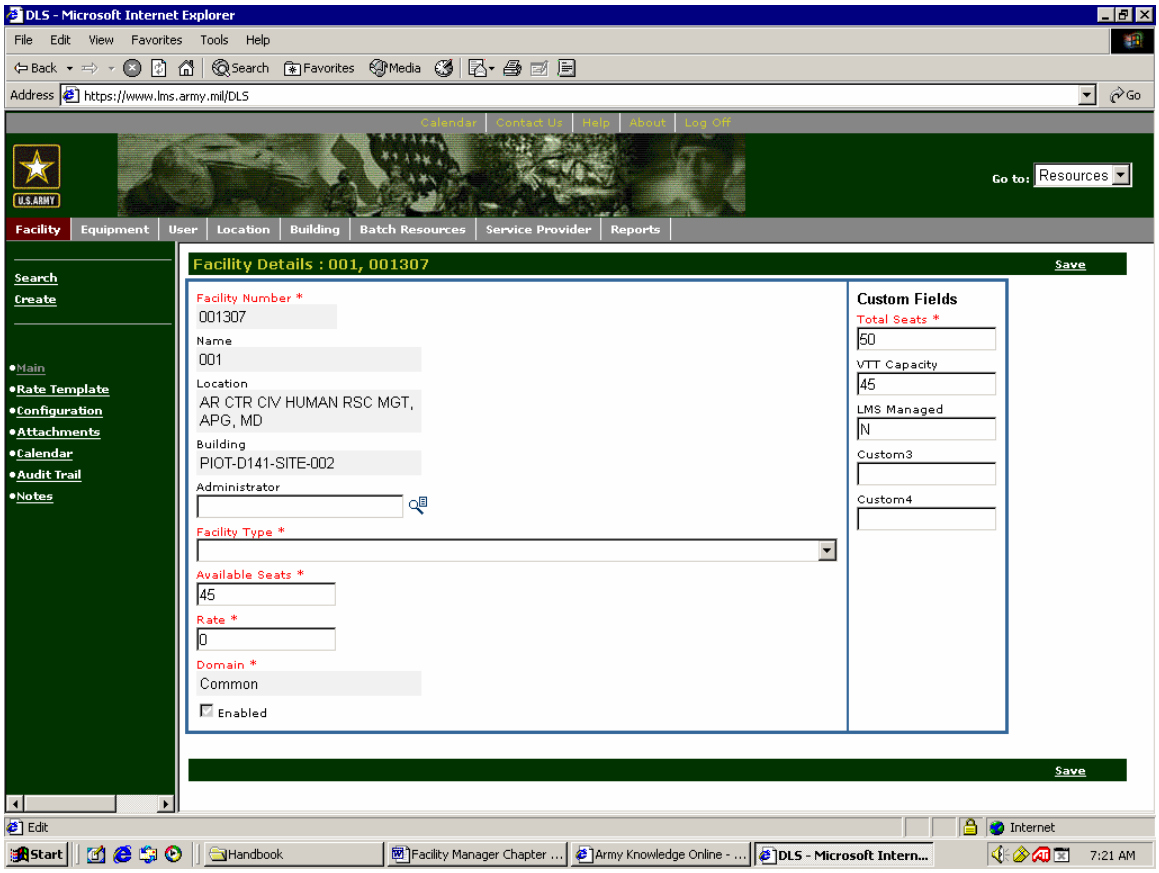
(*) level by the LMS, but by an external scheduler, such as ATRRS.

6. **Custom Fields (*)**: This area is reserved for configuration by the LMS System Administrator (SA). In this case 3 of the 5 available fields have already been used by the LMS SA. They can be mandatory or optional entries as shown above. Enter information in the fields as required/desired.
7. Click **Save** to save your information and to create the facility.

Edit a Facility

After you have created the facility, you may edit the specified attributed or add additional information. To edit:

1. Select **Resources** in the **Go to:** drop-down list.
2. Click the **Facility tab** and click the **Search** link in the left sidebar.
3. Enter the search criteria and press Go.
4. Find the desired facility and click the Edit icon.



5. You can edit the information on the Facility Details screen by clicking in the appropriate data field.

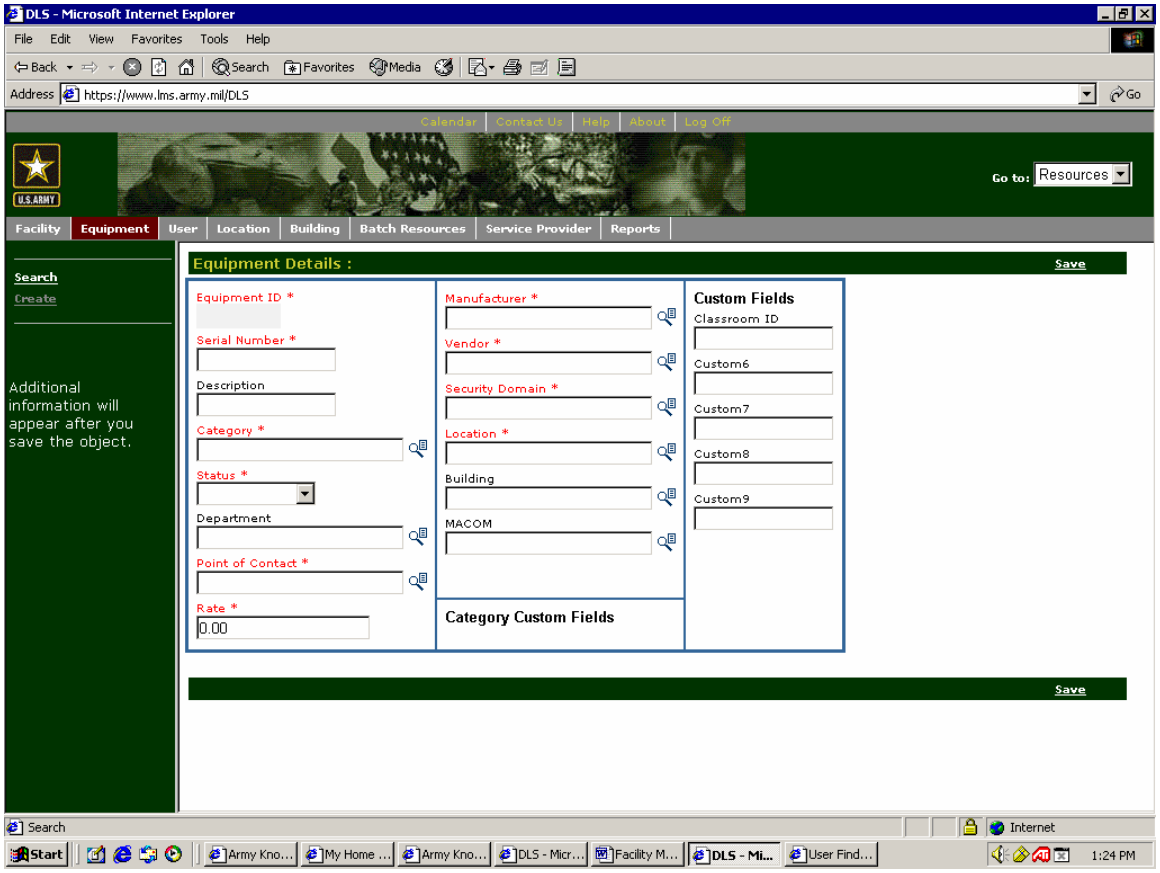
Links to the following functions are displayed in the left sidebar which can also be edited:

Link/Function	
Configuration	**Creating a Facility Configuration** To create a classroom in the LMS: 1. Select **Resources** in the Go to: drop-down list 2. Click **Facility** on the menu to display the **Search** link in the left navigation bar. 3. Click **Search** to display a list of rooms you can edit 4. Click the **Configuration** link in the left sidebar to display the ***Configuration*** page. 5. Enter a name for the configuration, and if desired, a description, capacity, and rental charge. 6. Click the **Add** button to list the configuration at the top of the page. You can delete a listing by clicking the red delete icon next to a listing.
Attachments	See Tab 11
Resource Calendar	See Tab 12
Notes	See Tab 14

Create and Edit Equipment

To create an equipment item in the LMS:

1. Select **Resources** in the Go to: drop-down list
2. Click **Equipment** on the menu to display the **Create** link in the left navigation bar.
3. Click **Create** to display the Equipment Details Screen to define an equipment resource.



4. Enter the ***required*** information needed to define the equipment item:

Required Information	Description
Equipment ID	The system provides this value after the item is created (saved).
Serial Number	Number used to track the equipment.
Category	Category under which this equipment is classified.
Status	Status for the item. Additional status values can be added.
Point of Contact	Manager of the resource.
Rate	Cost of the equipment per hour when used to deliver a class.
Manufacturer	Manufacturer of equipment.
Vendor	Supplier from whom the equipment was purchased.

Location	Geographical location of the item. Specifying a location for an equipment item enables the item to be assigned as a resource to a lesson iteration.
Security Domain	Use the Finder icon to find and select a security domain for the item.

5. Enter any ***optional*** information for the equipment item:

Optional Information	Description
Description	Enter a description for this item.
Department	Enter a department for this item.
Building	Use the Finder icon to find and select a building for the item.
MACOM	Use the Finder icon to find and select a command for the item.
Classroom ID	Enter the ID number where the equipment is located

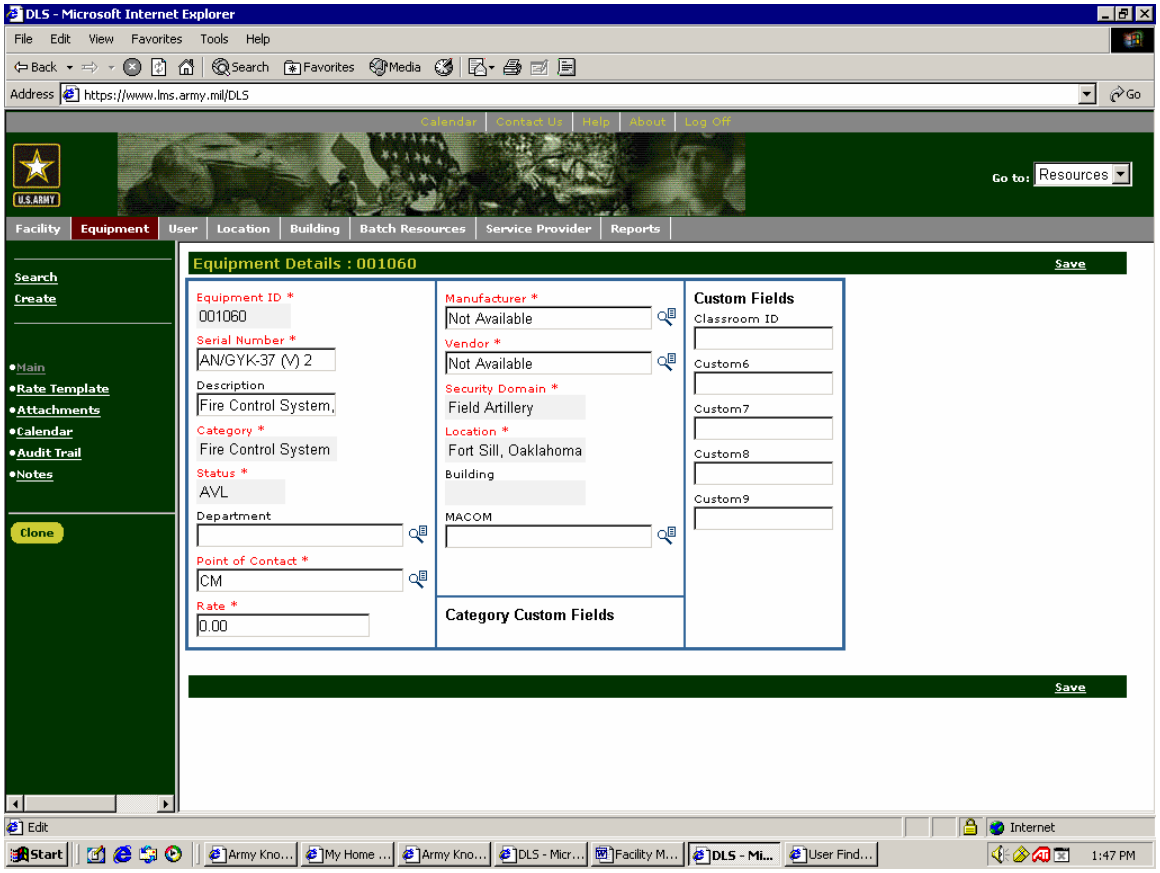
6. Custom Fields (*): This area is reserved for configuration by the LMS System Administrator (SA). In this case 1of the available fields has already been used by the LMS SA. They can be mandatory or optional entries as shown above. Enter information in the fields as required/desired.

7. Click **Save** to save your information and to create the equipment.

Edit Equipment

After you have created the equipment, you may edit the specified attributes or add additional information. To edit:

1. Select **Resources** in the **Go to:** drop-down list.
2. Click the **Equipment tab** and click the **Search** link in the left sidebar.
3. Enter the search criteria and press Go.
4. Find the desired equipment and click the Edit icon.



5. You can edit the information on the Equipment Details screen by clicking in the appropriate data fileds.

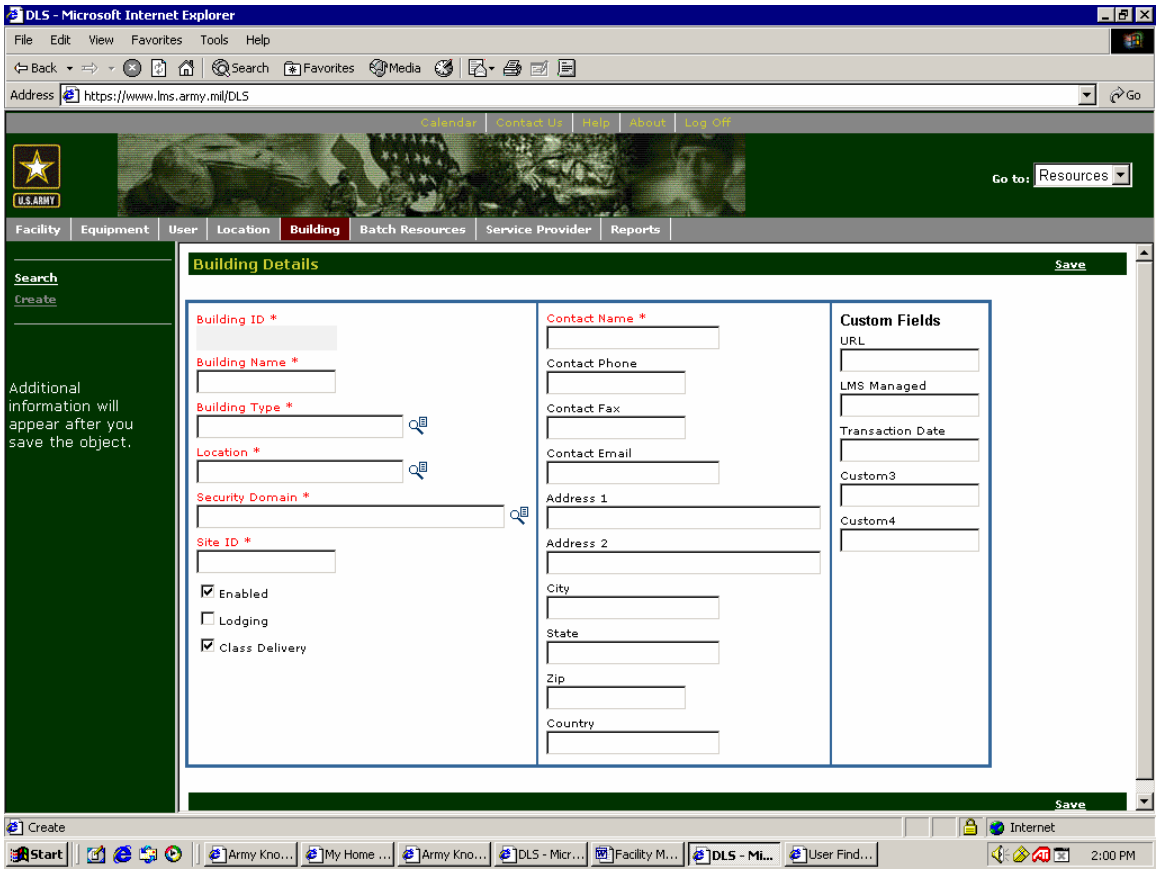
Links to the following functions are displayed below, where additional edits can be performed:

Link/Function	For More Information, See:
Rate Template	Tab 10: Creating a Rate Template for a Resource
Attachments	Tab 11: Attachments
Resource Calendar	Tab 12: Using the Equipment Resource Calendar
Audit Trail	Tab 13: Viewing Audit Trails
Notes	Tab 14: Notes

Create and Edit Buildings

To create a building in the LMS:

1. Select **Resources** in the Go to: drop-down list
2. Click **Building** on the menu to display the **Create** link in the left navigation bar.
3. Click **Create** to display Building Details screen to define a building resource.



4. Enter the ***required*** information needed to define the equipment item:

Required Information	Description
Building ID	The system provides this value after the item is created (saved).
Building Name	Name of the building.
Building Type	Type of building.
Contact Name	Point of contact for the building.

Enabled	If checked, resource can be used; if unchecked, resource is unavailable for scheduling.
Lodging	Functionality not used.
Class Delivery	If checked, this enables the building to be used for delivery of lesson iterations.
Contact Phone, Fax, Email, Address	Additional contact information of the POC.

5. Enter any ***optional*** information for the equipment item:

Optional Information	Description
Location	Geographical location of building.
Security Domain	Use the Finder icon to find and select a security domain for the item.
Site ID	If applicable, the identification number of the site.
URL	When used, provides additional on-line information about the building
LMS Managed	Yes/No entry that indicates if a facility is not scheduled at seat level by the LMS, but by an external scheduler, such as ATRRS.
Transaction Date	Not currently used

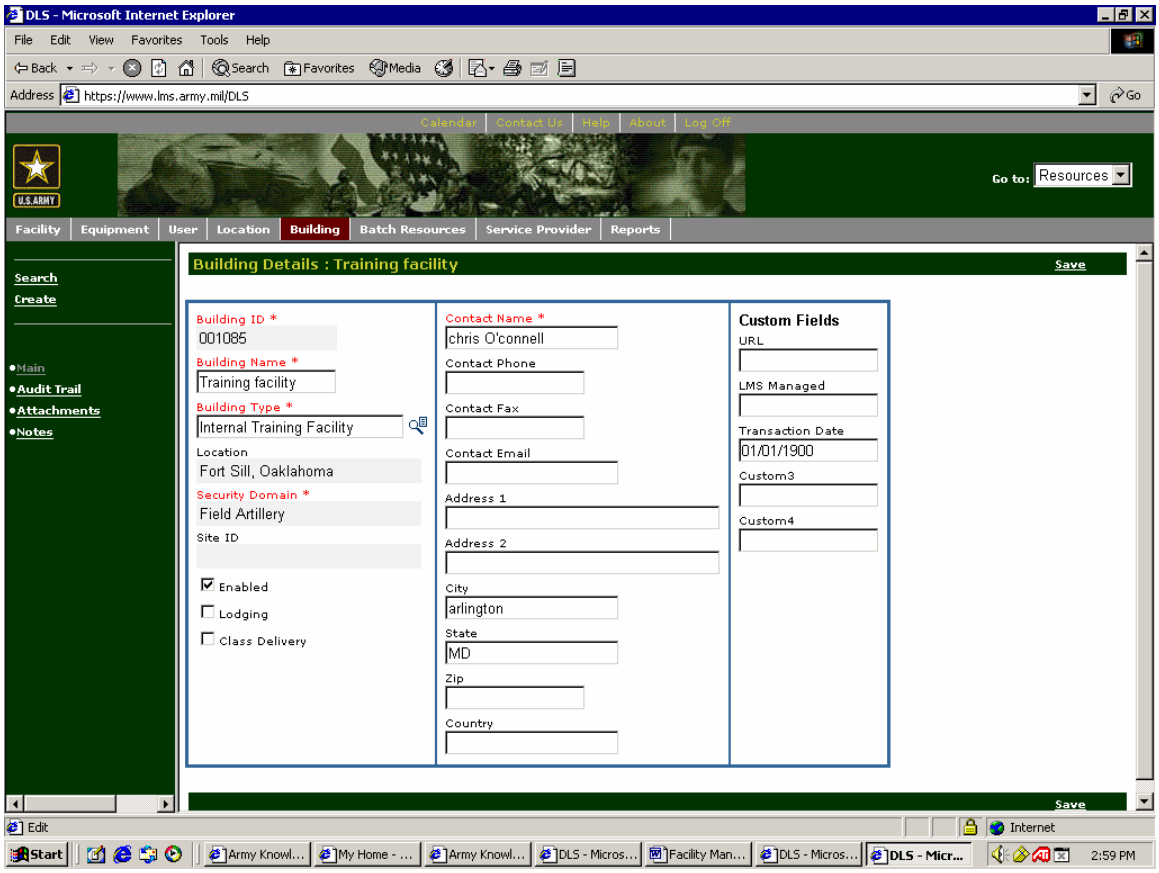
6. This area is reserved for configuration by the LMS System Administrator (SA). In this case 3 of the available fields have already been used by the LMS SA. They can be mandatory or optional entries as shown above. Enter information in the fields as required/desired.

7. Click **Save** to save your information and to create the building.

Edit Building

After you have created the building, you may edit the specified attributes or add additional information. To edit:

1. Select **Resources** in the **Go to:** drop-down list.
2. Click the **Building tab** and click the **Search** link in the left sidebar.
3. Enter the search criteria and press Go.
4. Find the desired building and click the Edit icon.



5. You can edit the information on the Building Details screen by clicking in the appropriate field.

After the system creates the item, links to the following functions are displayed:

Link/Function For More Information, See:

Audit Trail	See TAB 13:
Attachments	See TAB 11:
Notes	See TAB 14:

View Resource Calendars/Schedule Calendar Events:

Every resource has a calendar so you know the times the resource will be needed and the locations where it will be deployed. You can view the calendar by month, by workweek (Monday through Friday) or by day. Additionally, if you want to view the schedule for a resource in another time zone, you can change your system time zone to another. The resource calendar view can also be used to schedule maintenance work or downtime for resources.

Resource Calendars (for Scheduled Resources)

Each facility, location, and equipment item (i.e. resource whose time can be scheduled/reserved) has a calendar that can be used to schedule the times it will be needed and locations where it will be deployed. Within the resource calendars, you can also schedule events. You would want to schedule an event if the resource was going to be unavailable for use or some other necessary allocation of the resource where it would be unavailable for regular scheduling. These are represented as events.

Using the Facility Resource Calendar

To use the facility resource calendar in the LMS:

1. Select **Resources** in the Go to: drop-down list
2. Click **Facility** on the menu to display the **Search** link in the left navigation bar.
3. Enter search criteria in the fields in the left sidebar and click **Search** to find an existing facility.
4. Click the Edit icon next to a facility listing.
5. Click **Calendar** on the left menu to display the calendar.
6. Use the following controls to add or find an event:

View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time zone	Change the calendar display to show events in different time zones. The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to

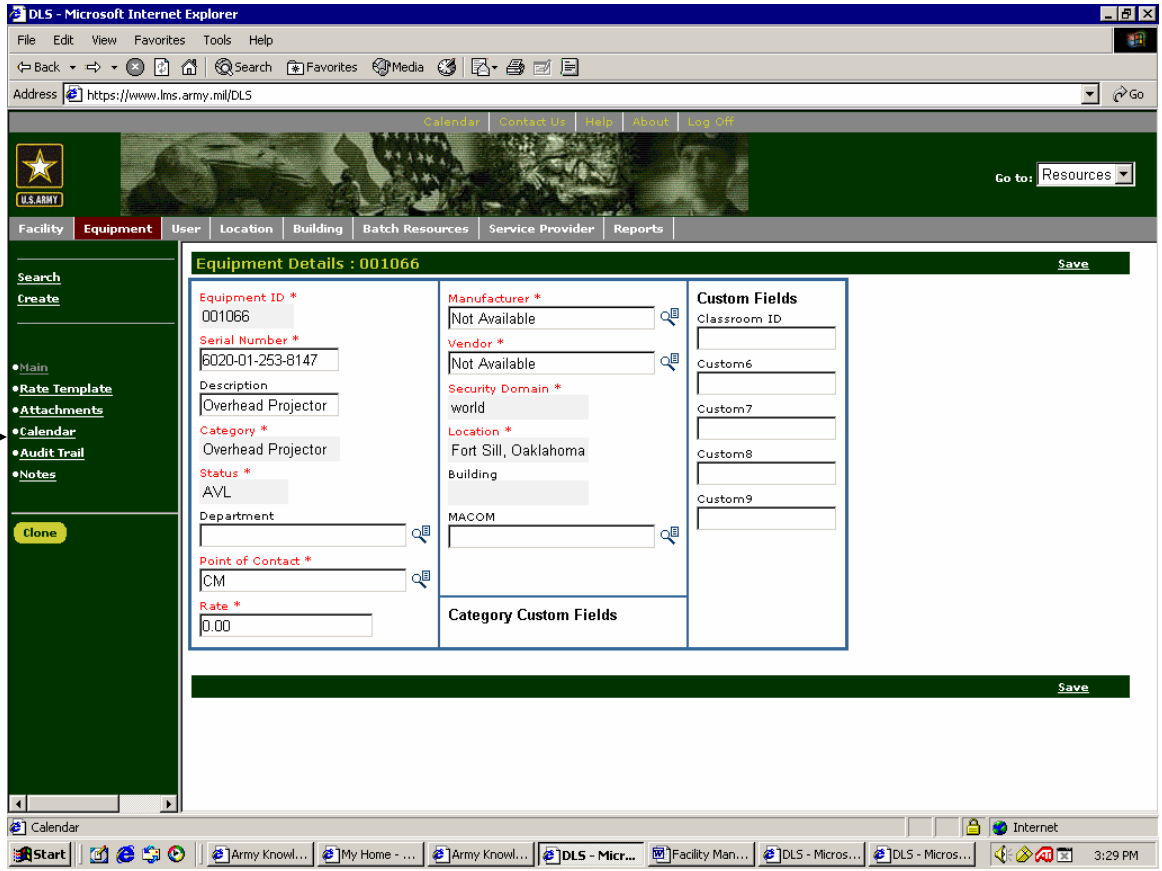
	reflect the new time zone.
Add New Event	Use this functionality to schedule known events for the resource that would make it unavailable for regular scheduling (e.g., maintenance work). Select an event type to display the Event Detail page. The Event type has a Start Date, and the All Day Event also contains an end date.
Show Date	Selecting a date from the pop-up calendar and then clicking **Go** will display that date in the main calendar.

1. Click **Save** when finished if adding or editing an event.

Using the Equipment Resource Calendar

To use the equipment resource calendar in the LMS:

1. Select **Resources** in the **Go to:** drop-down list
2. Click **Equipment** on the menu to display the **Search** link in the left navigation bar.
3. Enter search criteria in the fields in the left sidebar and click **Search** to find an existing equipment resource.
4. Click the Edit icon next to a resource listing.



5. Click **Calendar** on the left menu to display the calendar.
6. Use the following controls to add or find an event:

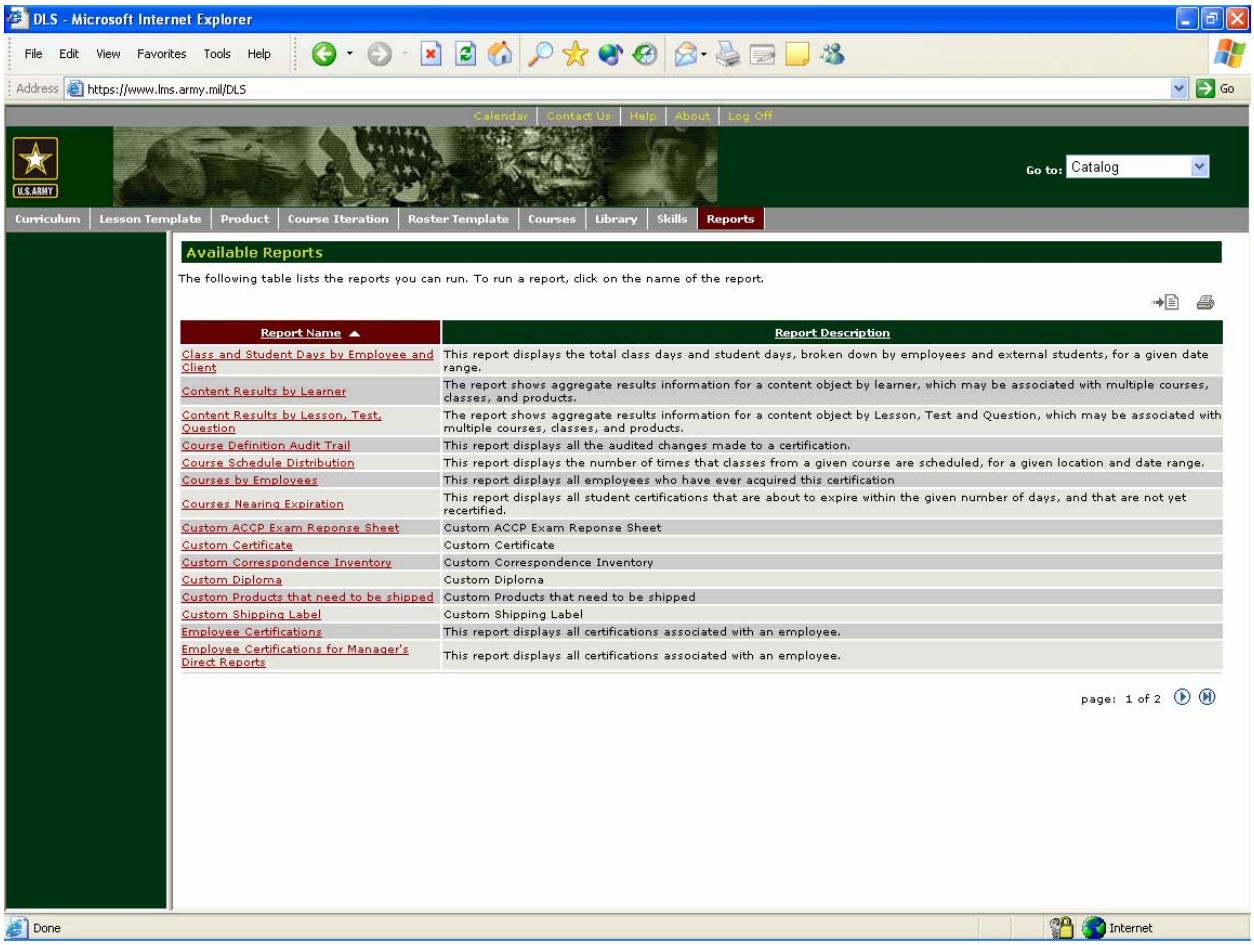
View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time Zone	Change the calendar display to show events in different time zones. The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to reflect the new time zone.
Add New Event	Use this functionality to schedule known events for the resource that would make it unavailable for regular scheduling (e.g., maintenance work). Select an event type to display the Event Detail page. The Event type has a Start Date, and the All Day Event also contains an end date.
Show Date	Selecting a date from the pop-up calendar and then clicking **Go** will display that date in the main calendar.

7. Click **Save** when finished if adding or editing an event.

Create Reports

The LMS provides pre-defined reports on a wide range of data. You can access data and reports in some or all of the modules found in your drop-down list, with the exception of My Home. Exactly what you will see depends on your role and your security privileges.

Once you select one of the modules in the drop-down, the LMS displays the Reports tab, which lists the available reports for that module. Some reports may be available within multiple modules. For example, "Classroom Instructor Assignments" may appear under "Lessons," "Instruction," and "Resources" since not everyone has access t all three modules.



Once you have located the desired report, select it. Depending on the contents of the report, the LMS may prompt you to enter more information before the report is generated (e.g., the "Roster" report prompts you for the lesson number). After you enter any additional data, the LMS generates and displays that report. From the report displayed on

the screen, you can print out the report, export it as a file to your computer, or search the text.

When you request a report from over the web, you must be careful that you get the correct data. If you attempt to run the same report a second time but with new information (e.g., a new lesson number), your browser may call up the first report from the memory cache on your computer. To avoid this, click the Refresh icon on the Reports viewer. The report data will be refreshed according to your new entries.

Running and Viewing System Reports

To run/view a system report in the LMS:

1. Access the LMS.
2. Choose one of the modules from the drop-down list.
   The system displays the tabs for the module. If the module supports running reports, a **Reports** tab is displayed.
3. Click the **Reports** tab. A list of the system reports that have been assigned to the current module is displayed. If no system reports have been assigned to the current module, the page does not display any reports.
4. Select the name of the report you wish to run.
5. If required, enter parameter information and click Submit. If no parameter fields appear, simply click Submit.

Note When running a report over the web, if you attempt to run the same report a second time, your browser might call the report from cache. Click the refresh icon on the reports viewer. The report data is refreshed according to your input.

LEARNING MANAGEMENT SYSTEM

CHAPTER 4

FACULTY

(Instructor, Assistant Instructor, Facilitator, Subject Matter Expert, and Counselor)

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Faculty
(Instructor, Assistant Instructor, Facilitator, SME, & Counselor Functions within the LMS)

Introduction

In this chapter, you will build on the functions that you learned in Chapter 1 and Chapter 2 to obtain a greater understanding of the LMS and the system functions you will use in the role of a Faculty member. Listed below are the modules that are accessible in the LMS for the Faculty role, together with the Tabs (from the Tab Bar), associated with that module, and the links located in the left navigation bar associated with each Tab. Modules are found by clicking within the **Go- to** drop down box in the upper right quadrant of the LMS screen.

Go-to:	Tab	Left Navigation Bar
My Home This module (the default module for all users) allows you to view your training information including transcript and registrations as well as search the catalog and launch collaboration functions.	My Home	Registrations Development Plan Search Training Catalog Find Experts Find Communities Order History Transcript Team Summary Approve Requests Initiatives NOTE: Some learners may have more links.
	My Development	Registrations Transcript Skills Skill Gap Development Plan Course Progression Individual Training Plan
	Training Catalog	No links – only search capability.
	Information Resources	No links – only information AKO

Go-to:	Tab	Left Navigation Bar
	Communities	Communities of Practice Personal Communities Q & A People Online
	Experts	Find Subject Matter Experts Communities in which I am an Expert
	Assessments	Critiques
	Personal Info	Main Information Lesson Requests Job Profile Personalize Catalog Personalize Homepage
My Team This module allows you to view and manage instruction units you are scheduled to teach or assist in teaching, including recording attendance and grades and viewing your teaching schedule.	Team Summary	(See Main Screen)
	Approve Requests	(See Main Screen)
	Profiles	(See Main Screen)
	Courses	(See Main Screen)
	Compare Skills	(See Main Screen)
	Initiatives	(See Main Screen)
	Ad Hoc Learning	(See Main Screen)
	Reports	(See list on Main screen)
Instruction* This module allows you to view and manage instruction units you are scheduled to teach or assist in teaching, including recording attendance and grades and viewing your teaching schedule. * You must be assigned to instruct a lesson before this option will appear in the Go to: dropdown box.	My Lessons	(See Main Screen)
	Lesson Critiques	(See Main Screen)
	Qualifications	(See Main Screen)
	Questionnaire	Search Create
	Reports	(See List Main Screen)

In this section you will obtain a greater understanding of the LMS and the system functions you will use.

Resource and Event Scheduling

The Resource and Event Scheduling functions allow for short range scheduling (less than one year) of instructors, classrooms, equipment, and materials; production and distribution of schedules; and changing schedules. Your function is:

- View Lesson Details (with scheduling)
- Assign Resources to Learners.

View Lesson Details (including Schedule)

When you need to see if resources have been assigned to lessons or other learning events or to edit the names or types of resources already associated with the item, you must first view the lesson details.

Viewing and Editing Lessons

Instructors can view and edit detail information for lessons that they are assigned to teach if the system administrator has granted them those privileges. These tasks are performed in the Lesson Detail pages, which are accessed from the *Instructor Schedule* page.

To view and edit lesson detail information:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons on the menu bar.
3. Click a title link in the Lesson Title column to display the Lesson Detail page
   OR
4. Click a title link in the Lesson column to display the Lesson Detail page.

Note: You can also access the Lesson Detail pages from the Roste*r* page by clicking the Lesson Number links at the top of the page. The Roster page is displayed by clicking the View link in the Roster column on the Instructor Schedule page.

Instructors can also view location and session template information for a lesson by clicking the Location and Session Template links on the Roster page.

View Roster

The LMS creates a roster for every lesson in the Catalog. This roster is available for both active and past lessons. Viewing rosters is a critical action necessary to perform important functions associated with training delivery, such as:

- Add notes
- View Learners' personal information
- Perform waitlist actions
- Cancel registered Learners
- Substitute Learners

- View registration details.

You can also print or export the roster.

Assign Resources to Learners

The LMS allows you to assign specific resources to Learners within lessons. Assigning resources to specific Learners increases the accountability of resource management and facilitates tracking lost or missing resources.

For lessons, the LMS allows you to assign resources to specific Learners. This facilitates the tracking of equipment and other resources provided to Learners in a particular lesson, and provides for better accountability.

To assign resources to Learner, follow these steps:

1. Select Instruction from the Go-to: Drop-down list.
2. Click the Calendar link on the upper menu to display Personal Calendar.
3. For the course in which the student is registered, select Roster to display Session Attendance.
4. Select Lesson Roster.
5. For the particular Learner, select the Add, which has a plus sign and the words "add" next to it icon in the Action column
6. The LMS will allow you to assign resources to any Learner who Open-Normal Registration status. This will launch another window that lists all the resources assigned to the lesson as well as any already assigned to the Learner.
7. To add a resource, select the resource type from the drop-down list and click Go. This will list all resources assigned to the lesson that are of that type.
8. Click the check mark icon under the Assign column to assign the resource to the Learner. This will automatically decrement from the available resources from assignment, thus preventing you from double assigning the same resource twice.
9. The assignment has been automatically saved, so you only need to "X" out of the screen.
10. To view or delete the assigned resource, click the "View Resources Assigned to Users" link under the roster. Deleting the assignment will automatically put the resource back in the pool of assignable resources.

Training Delivery

The Training Delivery functions provide for the crediting of Learners; delivery of electronic training; monitoring of Learner progress; and post-instruction processing (posting grades and generating completion certificates). Training Delivery also includes managing the class roster and waitlist. These functions allow the Instructors to perform numerous pre- and post-instruction activities. Your functions include:

- View Your Teaching Schedule
- View Roster

- Enter Notes
- Establish Office Hours
- Record Attendance
- Enter and Update Grades
- Mark Lessons Delivered
- Mark Lessons Complete
- Cancel Lesson
- Add Learners to Waitlist
- Remove Learners from Waitlist
- Change Waitlist Priority
- Substitute Learners.

View Your Schedule

If you have been assigned to instruct or to facilitate a lesson, those lessons will appear on your training schedule. This schedule is available on the LMS and provides you the following information:

Schedule Teaching Fields

- Lesson Title
- Start Date
- Lesson Number
- Sessions (Days/Times)
- Location
- Roster
- Office Hours
- Actions

Your training schedule will display lessons you are scheduled to train, as well as those you have already delivered.

Viewing Your Teaching Schedule

Instructors can view a list of all the lessons they are scheduled to teach and lessons they have already taught on the Instructor Schedule page. Lessons can be sorted by entering dates into the date fields and clicking Go. Clicking the title of a lesson template or lesson displays the Lesson Template or Lesson Details pages where you can edit the information. Clicking a location or session title displays information on the respective item.

There are other links on this page that display pages where you can perform several other tasks:

- Clicking the Add link in the Office Hours column allows you to enter the hours when you are available.

- Clicking the View link in the Roster column allows you to perform pre-lesson, concurrent, and post-lesson tasks.

To view your teaching schedule, follow this path to display the Instructor Schedule page:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons on the menu bar.

Performing Pre-lesson Tasks

The following tasks are usually done before a lesson begins:

Instructors can view and edit detail information for lesson templates and lessons that they are assigned to teach if the system administrator has granted them those privileges.

Viewing and Editing Lessons

Instructors can view and edit detail information for lessons that they are assigned to teach if the system administrator has granted them those privileges. These tasks are performed in the Lesson Detail pages, which are accessed from the Instructor Schedule page.
To view and edit lesson detail information:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons on the menu bar.
3. Click a title link in the Lesson Title column to display the Lesson Detail page. For more information on editing lesson templates, see "Creating a Lesson Template" in "Building the Training Catalog".

   OR
4. Click a title link in the Lesson column to display the *Lesson Detail* page. For more information on editing lessons, see "Overview of Lessons" in "Scheduling and Managing Lessons".

Note: You can also access the Lesson Detail pages from the Roster page by clicking the Lesson Number links at the top of the page. The Roster page is displayed by clicking the View link in the Roster column on the Instructor Schedule page.

Instructors can also view location and session template information for a lesson by clicking the Location and Session Template links on the Roster page.
You can cancel a lesson that you are scheduled to teach. This will cancel all learner registrations for that lesson.

Canceling a Lesson

You can cancel a lesson that you are scheduled to teach. This will cancel all learner registrations for that lesson.
To cancel a lesson:

1. In the Go to: dropdown box, select Instruction.

2. Click on My Lessons on the menu bar.
3. In the Roster column, click on View of desired lesson.
4. Select Cancel from the Actions column.
5. Enter a reason for the cancellation in the text box.
6. Click the Save link at the bottom of the page.

Note: A lesson also can be cancelled from the Grade Lesson and Lesson Attendance pages.

Performing Lesson Tasks

You can send an email to every learner registered for one of your lessons.

E-mailing Your Lesson

You can send an email to every learner registered for one of your lessons. This is an effective way to communicate information to everyone in the lesson at one time.

To email students in a lesson:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons on the menu bar.
3. In the Roster column, click on View of desired lesson.
4. Click the Entire Lesson link in the Student Name column to display your email program. You can email individual learners by clicking their names.

To exchange messages with learners about a lesson, you can launch the Chat function.

Managing Waitlists, Rosters, and Registrations

When a registration is created for a lesson that has no seats available (i.e., all the seats have been reserved for other registrations), the system automatically adds the registration to the waitlist for the lesson. The system continues adding new registrations to the waitlist until there are no more spaces available in the waitlist, at which time the system does not allow any more registrations for the lesson.

Both the number of seats available in a lesson and the number of waitlist spaces in the lesson are specified when the lesson is created.

Note: Waitlists do not apply to all lessons.

The following waitlist and registration tasks are usually done before a lesson starts:

As a method of making seats available in a lesson, you may choose to move confirmed registrations to the waitlist.

Add Learner to Waitlist

If the item requested by a Learner is not available, the LMS adds the Learner to a waitlist with an assigned priority. The LMS provides the capability to move registered Learners to the waitlist of the lesson for which they are registered. You would want to move a registered Learner to the waitlist if you needed to make room another Learner or if you wanted to leave confirmed registrations open for mission-critical or higher priority Learners. You can only perform this action for lessons for which you have access (e.g., you can only move Learners in lessons you are scheduled to teach).

As a method of making seats available in a lesson, you may choose to move confirmed registrations to the waitlist. Once you move a confirmed registration to the waitlist, the seat reserved for the registration becomes available. In addition, seats become available in a lesson when registrations for the lesson are cancelled or the lesson scheduler adds seats to the lesson.

To move a registration to the waitlist:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons Tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.
4. Click the Waitlist icon next to a listed item.
5. In the Waitlist pop-up window, enter a reason for the change.
6. Click the Save button. The Waitlist icon is replaced by the Confirm and Waitlist Priority icons in the Action column.

Note: This functionality is only available for only those lessons you are scheduled to teach. When a registration is waitlisted, the system automatically assigns a priority of zero (0). You can assign a different value to any waitlisted registration to indicate that the registration has a higher or lower priority.

Change Waitlist Priority

If the item requested by a Learner is not available, the LMS adds the Learner to a waitlist with an assigned priority. This priority can be based on a pre-defined number or on a first-come, first-served basis. The LMS does not automatically move Learners from the waitlist to a vacant seat. Therefore, you have the option of adding Learners. If and when seats become available, you have the option to move or re-prioritize waitlisted reservations. You can also substitute confirmed registrations for waitlisted Learners, or cancel registrations.

When a registration is waitlisted, the system automatically assigns a priority of zero (0). You can assign a different value to any waitlisted registration to indicate that the registration has a higher or lower priority. Priority information is for reference only. Instructors can use priority when deciding which waitlisted registrations to confirm as seats become available in the lesson.

Note**:** Priority information is for reference only. Instructors can use priority when deciding which waitlisted registrations to confirm as seats become available in the lesson. Priority values are arbitrary; the LMS does not place any restrictions on the priority values you use. You can use any range of values; however, the range should reflect your business practices (e.g., 0 is the highest priority and 99 is the lowest, or vice-versa).

To re-set a waitlist priority:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons Tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.
4. Click the Set Waitlist Priority icon next to a listed item.
5. In the Set Waitlist Priority pop-up window, enter a priority value and a reason for the change.
6. Click the Save button. The new priority value will be listed in the Waitlist Priority column.

Note: This functionality is only available for only those lessons you are scheduled to teach.

When a seat becomes available in a lesson, you can choose to confirm any waitlisted registration for the lesson.

Remove Learners from Waitlist

If an item requested by a Learner is not available, the LMS adds the Learner to a waitlist. You may perform these actions on that waitlisted registration:

If there is an open registration, you may move the Learner from the waitlist to that open seat.

When a seat becomes available in a lesson, you can choose to confirm any waitlisted registration for the lesson. Confirming a waitlisted registration moves it from the waitlist to the available seat and changes the status of the registration from Open - Waitlisted to Open - Normal. You can choose a waitlisted registration based on order (i.e., first waitlisted registration is assigned to first available seat) or priority.

To confirm a waitlisted registration:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons Tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.
4. Click the Confirm icon next to a listed item.
5. In the Confirm pop-up window, enter a reason for the change.
6. Click the Save button. The Confirm and Waitlist Priority icons are replaced by the Waitlist icon in the Action column.

Instructors can substitute one learner for another in a lesson.

Learner

Substituting Learners in a Lesson

The LMS allows you to substitute unregistered Learners for registered ones. Performing this action bypasses any manager approval required for the lesson. This would be used if a waitlist had reached its capacity, so no other Learners could request registrations. In such a case, a Learner could simply be substituted without have to be first put on a waitlist, and then granted an open seat.

Instructors can substitute one learner for another in a lesson.
Note: This bypasses the normal learning approver processes.

To substitute a learner in a lesson in the LMS:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons Tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.
4. Click the Substitute Learner icon for the Learner. The Substitute Learner page appears.
5. Enter the name of the new learner and click Go.

Note: This functionality is only available for only those lessons you are scheduled to teach.

The primary reason to cancel a registration is to indicate that a learner did not attend a lesson, but this procedure can be used to cancel a registration for any reason, including freeing up a seat for a waitlisted registration.

To cancel a learner's lesson registration:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons Tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.
4. Click the Cancel icon in the Action column next to a learner's name in the Withdrawal Window page.
5. Enter the withdrawal reason and output code for withdrawal.
6. Click on Submit. This will remove the learner's name from the lesson list.

Note: This functionality is only available for only those lessons you are scheduled to teach.
Instructors can assign specific resource to specific Learners. For example, if the lesson uses laptop computers, the Instructor can assign specific laptops to Learners. This allows the Instructor to more easily track the location of resources.

Assign Resources to Learners

For lessons, the LMS allows you to assign resources to specific Learners. This facilitates the tracking of equipment and other resources provided to Learners in a particular lesson, and provides for better accountability.

To assign resources to Learner, follow these steps:

1. Select Instruction from the Go-to: Drop-down list.
2. Click the My Lessons tab (this should be the default)
3. Find the Lesson and click View under the Roster column. This will display the roster for the lesson.
4. In the Action column, select the Add icon, which has a plus sign and the words "add" next to it. The LMS will allow you to assign resources to any Learner who Open-Normal Registration status. This will launch another window that lists all the resources assigned to the lesson as well as any already assigned to the Learner.
5. To add a resource, select the resource type from the drop-down list and click Go. This will list all resources assigned to the lesson that are of that type.
6. Click the check mark icon under the Assign column to assign the resource to the Learner. This will automatically decrement from the available resources from assignment, thus preventing you from double assigning the same resource twice.
7. The assignment has been automatically saved, so you only need to "X" out of the screen.
8. To view or delete the assigned resource, click the "View Resources Assigned to Users" link under the roster. Deleting the assignment will automatically put the resource back in the pool of assignable resources.

Entering Lesson Notes

You can add notes to any Learner on the roster for any lesson you can access. You can also enter notes concerning individual learner's registrations. You can also add notes for the entire class. These notes are free text fields and remain after the lesson has been delivered. Entering notes is a useful function for recording information about a learner or the class. One use of notes might be to document extenuating circumstances. Such information might include documenting a reason for missed training. You can add notes to any lesson you are scheduled to teach. These notes can be viewed while the lesson is being taught, or after it has been delivered.

To display the Lesson Roster page:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.
4. Click the Registration Notes icon next to either the entire lesson or next to individual learners to display the Notes pop-up window.
5. Search for existing notes by entering criteria in the search fields and clicking Go, or add a new note by clicking the Add New link in the upper right corner of the window.
6. Click Save.

Establish Office Hours

You can post office hours for any lesson that you are scheduled to teach or facilitate. This indicates to the Learners when you can be contacted regarding the lesson. The office hours will appear in the lesson details for registered learners. The free-text form allows you to indicate office hours as well as the media for interaction (e.g., physical location, online through chat, etc.).

To post your office hours for a lesson:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons Tab on the menu bar (this should appear by default).
3. Click the Add link in the Office Hours column to display the Add New Office Hours page.
4. Enter the hours and days you are available in the Office Hours text box.
5. Click Save.

Note: The Add link now is changed to an Edit link in the Office Hours column.

Communities (Collaboration)

The Collaboration functions allow you to participate in chat sessions, threaded discussions, and community groups. A community is a place in the LMS where a group of peers can store attachments, link to URLs, and access experts for information. You can participate in any community by adding that community to your watch list, by taking part in the discussions, or by becoming an expert for the community.

Your functions include:

- Search for Communities
- Participate in Communities
- Initiate and Participate in Chat
- Initiate and Participate in Discussion Threads.

Participate in Communities

When you participate in a community, you have these options:

- Chat (real time collaboration, better known as “instant messaging”)
- Discussion (which is organized by topics and which maintains a record of the discussion thread
- Attachments (documents and other files added to the community which may be downloaded by the members)

While you may initiate chat or a discussion thread, the community administrator determines your ability to attach files.

See TAB 62: View Personal Communities

Search for and Participate in Communities

Searching for a community is useful for those seeking to interact with peers or experts in some field of interest or related to the subject matter of the training they are engaged in.

To view a community:

1. In the Go to: dropdown box, select My Home.
2. Click on Communities tab on the menu bar
3. Clicking the Communities of Practice link in the left navigation bar displays the Communities of Practice page that shows you a list of communities that are associated with either your MOS/Career Field, roles, skills, or courses.
4. In the View by drop-down list select MOS/Career Field**,** role**,** course**,** or skill to search for a community associated with that object. The Community Search Result section returns the following information:
    - Title of the returned object that is associated with a community.
    - Number of communities associated with that object.
5. Click the View Communities link next to a title to display the list of communities associated with it. In the list of communities, you can:
    - Add a community to your watch list, by clicking the icon in the Add to Watch List column.

Note: If you are an expert in a community, it cannot be added to your watch list. Instead, the community is displayed in the Volunteer as an Expert page in the Experts tab.

- Go to the Community Detail page by clicking a community name in the Community column.
- Send an email to the community administrator by clicking the administrator's user name in the Administrator column.
- See the list of experts for the community by clicking the number in the Experts column.

Within a community, you can participate in discussions threads and chat sessions with persons in the same community. To access these, click on the corresponding links in the Community Details page. For more information, see TAB 19, “Discussions” and TAB 63, “Chat."

Initiate and Participate in Chat

You can initiate or participate in synchronous, real-time collaboration (better known as “chat” or “instant messaging”) related to a course, product, or community. You can use the chat room to communicate with others who are registered for the course or product. Chat is also available for those who are participating in or are experts in a community. Once you are granted access to a chat room related to a course, product, or community, it will remain available even if the item has been marked complete. A chat room is automatically created when the course, product, or community is created.

Launching Chat

To exchange messages with learners about a lesson, you can launch the Chat function.

To display the Instructor Schedule page:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons on the menu bar.
3. Click the Chat icon in the Actions column to display a pop-up window with the lesson chat text.
4. Enter text into the Compose Message text box and click Send. Click Clear to erase any text already entered.
5. Click on Send.

You can create discussion topics for a lesson and save them for future reference.

Accessing Chat Rooms

There are two ways to access a chat room:

- You can access a chat room for a catalog item once an order for a catalog item is set to confirmed.

Note**:** Chat rooms are not available for unconfirmed orders.

- You can access a chat room for every community in the system.

Accessing a Chat Room for a Catalog Item

A chat room group for a catalog item can be accessed by learners from:

- The Registrations page
- The Transcript page

To access a chat room from the Registrations or Transcript page:

1. In the Go to: dropdown box, select My Home.
2. Click the My Development tab on the top navigation bar.
3. Click the Registrations link on the left navigation sidebar. The Registrations page displays all the catalog items for which you are currently enrolled.
    i. OR
4. Click the Transcript link on the left-hand sidebar. The Transcript page displays all the catalog items you have completed.
5. The Chat icon is displayed in the Action column. Each catalog item has a separate chat group. To access a chat group for a particular catalog item, click the Chat icon next to the catalog item in which you are interested.
6. Enter text into the Compose Message text box and click Send. Click Clear to erase any text already entered.
7. Click on Send.

Accessing a Chat Room for a Community

To access a chat room for a community:

In the Go to: dropdown box, select My Home.

1. Click the Communities tab on the top navigation bar.
2. Click the Personal Communities link.
3. Click the name of a community for which you want to see a chat group.
4. In the Community actions row, click the Chat Room link to open the Chat window.
5. Enter text into the Compose Message text box and click Send. Click Clear to erase any text already entered.
6. Click on Send.

Communicating with Experts in a Community

In the Community Detail page, in the list of community experts, a Chat icon is displayed next to the names of community experts. When a community expert is in the chat room, the icon next to the expert's name is active. Click the icon to access the chat room.

See TAB 63: Chat
See TAB 19: Discussions

Initiate and Participate in Discussion Threads

You can initiate or participate in asynchronous discussion threads (or topics) associated with a course, product, or community. This form of collaboration maintains a complete history of the communication between those who participated in the discussion. Discussion threads allow you to post messages for others to respond to. Using new or existing threads you can communicate with others who are registered for the course or product or who are participating in or are experts in a community. Once you are granted access to a discussion related to a course, product, or community, it will remain available even after the item has been marked complete. Discussion threads are automatically created when the course, product, or community is created.

Launching Discussion

You can create discussion topics for a lesson and save them for future reference.

To display the Instructor Schedule page:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons on the menu bar.
3. Click the Discuss icon in the Actions column to display a pop-up window containing the lesson discussion topic list.
4. Click an existing topic to view it or reply to it, or click Create a Topic to begin a new topic.

Note: The ***Discussion*** module has its own help file that can be accessed by clicking the Help link in the upper right corner of the Discussion window.

You can create evaluations or view existing ones for a lesson you are scheduled to teach.

There are two ways to access a discussion group:

- You can access a discussion for a catalog item once the order for the catalog item is set to confirmed.

Note: Discussion groups are not available for unconfirmed orders.

- You can access a discussion group for every community in the system.

Accessing a Discussion Group for a Catalog Item

A discussion group for a catalog item can be accessed by learners from:

- The Registrations page
- The Transcript page

Note**:** You can access a discussion group for a catalog item only if the status of your order is set to confirmed. Discussion groups are not displayed for unconfirmed orders.

To access a discussion group from the Registrations or Transcript page:

1. In the Go to: dropdown box, select My Home.
2. Click the My Development tab on the top navigation bar.
3. Click the Registrations link on the left navigation bar. The Registrations page displays all the catalog items for which you are currently registered.

   OR

4. Click the Transcript link on the left navigation bar. The Transcript page displays all the catalog items you have completed.
5. The Discuss icon is displayed in the Action column. Each catalog item has a separate discussion group. To access a discussion group for a particular catalog item, click the Discuss icon next to the catalog item in which you are interested.

For more information about the tasks you can perform in discussion groups, see the Discussion help.

Accessing a Discussion Group for a Community

To access a discussion group for a community:

1. In the Go to: dropdown box, select My Home.
2. Click the Communities tab on the top navigation bar.
3. Click the Personal Communities link.
4. Click the name of a community for which you want to see a discussion group.
5. In the Community actions row, click the Discussion Board link to open the Discussion Group window.

For more information about the tasks you can perform in discussion groups, see TAB 19, “Discussions” and TAB 63, “Chat.”

Performing Post-Lesson Tasks

These tasks are usually performed after a lesson has ended. Note, however, that recording attendance can be done for individual lesson sessions, and crediting unregistered learners can be done at any time.

The instructor for a lesson (or any person with the appropriate privileges) must mark attendance for a learner.

Record Attendance

Recording attendance is a critical process for granting learners credit for attending training sessions. The LMS tracks attendance on a lesson-by-lesson basis. If the lesson spans multiple days, an attendance list for each day is provided. While recording attendance, you also have the capability to mark a lesson as delivered or canceled, which will update the Learners' transcripts.

The instructor for a lesson (or any person with the appropriate privileges) must mark attendance for a learner in the Instruction module. (Attendance can also be marked by a class or course manager in the Lessons module.)

To record attendance for a learner or a lesson in the LMS:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons Tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.
4. Click on Lesson Roster.
5. Select Lesson Attendance
6. For each session, select either the Mark All check box for the entire lesson or check boxes for individual learners.
7. Click Save.

For all lessons, regardless of whether the lesson is classroom-based or online, the instructor for the lesson can mark the lesson completed.

Marking a Registration as `No Show'

Both the instructor for a lesson and a lesson administrator can mark a registration as No Show. This means that a learner was registered for a lesson but never attended. Instructors can mark registrations only for lessons they teach, while lesson administrators can do this for all lessons. This action will cancel a registration. The registration is then listed on the roster page as Delivered - Late Cancel (No Show).

To mark a registration as No Show:

1. In the Go to: dropdown box, select Instruction.
2. Click on Lesson Critiques on the menu bar.
3. In the Roster column, click on View of desired lesson.

4. Click the No Show action icon to the right of a registration. A warning message will display informing you that the action will cancel the registration and cannot be undone. Click OK to continue. The registration will then be listed with the new status.

View Online Test Results

Instructors can view the results of online tests associated with a lesson by clicking a link in the Online Tests column on the Grade Lesson page. This can be useful when grading a learner. Results for the entire lesson can be viewed by clicking the Grade by Question link, or results for each learner can be viewed by clicking a Grade by Learner link.

To view online test results:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons on the menu bar.
3. In the Roster column, click on View.
4. Click a link in the Online Test column to display either the View by Test or View by Learner page.

For all lessons, regardless of whether the lesson is classroom-based or online, the instructor for the lesson (or any person with the appropriate privileges) can mark the lesson delivered in the Instruction module.

Enter and Update Grades

You can verify and enter test results into the LMS. If the test materials are non-electronic (e.g., paper-based), you must determine the results by using test answer keys, reading essays, running Scantron forms, or evaluating peer collaboration. If the test materials are electronic (e.g., online), the LMS automates the grading function. Many times, tests may be a combination of electronic grading and manual grading (e.g., a multiple choice test with an essay portion). In such cases of composite test media, you must manually enter the grade for the non-electronic portions of the test.

When a course and its testing are self-paced and tests are mailed back for grading and evaluation, you can record in the LMS the dates that the material was received, graded, and recorded. Test results are posted to the Learner's individual training record.

Test results can contain various levels of detail including:

- Pass/fail
- Percentage correct
- Alpha-numeric scores
- Specific questions marked incorrect.

Future access to this information varies by rank, unit, role, and other types of access permissions.

For all lessons, regardless of whether the lesson is classroom-based or online, the instructor for the lesson can record a grade for a learner in the Instruction module of the LMS.

To enter a grade:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.
4. Select Grade Entire Class.
5. Enter a value in the Success and Score fields for the entire lesson or for any individual learner. If you enter a grade in the row for "Entire Class," you must click the down arrow next to the field to give it to all the learners.
6. Click Save.

Updating grades can be done up until the point that the lesson is “Marked Delivered.”

If the lesson is associated with a course, the LMS will "roll-up" the grades from the individual lessons. From the Course Iterations tab in the Catalog module, the user can view the all the lessons and grades for individual learners, as well as a collection score for the course.

Credit Unregistered Learners

In a typical Army course, there are two dates: the date to report to the course and the start date. Some unregistered Learners may show up for the course on or before the start date. On the report date, you need to determine which Learners have reservations for the ATRRS-managed course, and which Learners are “walk-ins.” If any Learners have not already registered for the course, you need to register them by logging into ATRRS to post the Learner as a walk-in. When the walk-in is approved, ATRRS sends the reservation for the course to the LMS using the same process as for other reservations made in the LMS.

On the Roster page, you can credit Learners for courses not managed in the LMS.
For non-quota-managed courses, you can use this function to credit a Learner who attends only part of a course or who attends the course but cannot register because the course has already begun.

An instructor can select learners for which they want to give credit for a lesson, although the learners have not registered for the lesson.

To credit an unregistered learner:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons on the menu bar.
3. In the Roster column, click on View of desired lesson.
4. Click the Register Learner in this Class link.
5. Click the Search for Learners link to display a pop-up window.
6. Enter search criteria in the fields and click Go to list learners.

7. Select the check box next to one or more learner names and click the Add button at the bottom of the page.

A confirmation message appears to indicate the lesson credit was successfully recorded in the learner's transcript.

Delivering Learning

The type of item requested by a learner determines how it is delivered:

Product Delivery

For products, the type of item determines the delivery method:

- For launchable/downloadable products, the concept of delivery is not really utilized. In effect, the item is considered delivered when the link/icon for launching the content is made available upon confirmation of the order.
- For shippable products, the item is delivered when the shipping administrator marks the item (in the shipment) delivered. If the item is in any other status, such as back ordered, the learner cannot access any associated online content, and no one can mark the product complete.

For more information, see "Products".

Learning delivery can take place on an ad hoc basis, in which the delivered learning was not scheduled or requested in the LMS. For more information, see Tab 15, “Recording Ad Hoc Learning".

Courses, phases, modules and lessons are considered “delivered” when all contents have been taught.

- For classroom-based lessons (including broadcast sections), the Instructor delivers the content to Learners in a classroom (either at the Instructor’s location or at a remote/broadcast location). Broadcast lessons are offered through video conferencing or another type of multimedia broadcasting technology.
- For online lessons, the Instructor delivers the content by making it available to the browsers of the registered Learners or by joining them in a virtual classroom.

Once delivery is completed, you are responsible for recording any required or relevant information about the completion status and performance of individual learners. Marking a lesson delivered:

- Changes its status from Open to Delivered
- Moves the lesson from the Registration page to the Transcript page for all registered Learners
- Removes the lesson from the Training Catalog to prevent future requests for the

lesson.

Mark a Lesson Complete

Lessons can be marked `Completed - Successfully' or `Completed - Unsuccessfully'. Completing a lesson successfully credits the learner with any certifications or competencies associated with the lesson. An unsuccessful completion can be later changed to `Successful', but once marked `Successful', a lesson can only be changed to `Unsuccessful' in by a system administrator.

Learners and their managers can view this information in the LMS.

Whether a course is classroom-based or online, at its conclusion you need to mark that course complete. Once marked complete, the lesson will move from the Learner's Registrations to their Transcript. In marking a course complete you:

- Indicate success or non-success
- Specify the completion date
- Report an overall score (optional).

It is also possible to mark the course as "dropped" or "no show."

To mark a lesson completed:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.
4. Select Grade Entire class.
5. Select either the Yes or No radio button in the Success column.
6. If desired, enter a value into the text box in the Lesson Grade column.
7. If present, click a View Results icon in the Online Tests column to view results. For more information, see Tab 16:"Viewing Online Test Results".
8. Click Save.

Note: For more information on completion marking, see Tab 17: "Marking Completion" .

Mark a Lesson Delivered

For all lessons, regardless of whether the lesson is classroom-based or online, the instructor for the lesson (or any person with the appropriate privileges) can mark the lesson delivered in the Instruction module. The act of marking a lesson delivered moves it from a learner's Registrations page to Transcript page. If an instructor marks a lesson completed - unsuccessful, and then marks it delivered, the completion status can only be changed by a system administrator.

Note: Before the system can add the lesson to the list of completed products in a learner's profile, in addition to the lesson being marked delivered, the lesson must be marked Completed for the learner. For more information, see"Mark a Lesson Completed".

To mark a lesson delivered in the LMS:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons Tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.

Note: A lesson also can be marked delivered from the Grade Lesson and Lesson Attendance pages.

4. Click the Lesson Action field arrow. The Lesson Action drop-down list gives you the options.
5. Click Deliver in the Lesson Action drop-down box.
6. To confirm the lesson delivery, click the Date field icon to mark the lesson delivery date.
7. Select a date using the finder tool and enter a reason in the text box.
8. Click the Deliver Lesson link at the bottom of the page.
9. Click OK on the delivery confirmation pop-up window.

Cancel Lesson

You can cancel a lesson at any time before the lesson is marked delivered. Canceling a lesson cancels all the registrations for the lesson. You would want to cancel a lesson if resources were not available; the minimum number of learners was not met or other conflicts.

You can cancel a lesson that you are scheduled to teach. This will cancel all learner registrations for that lesson.

To cancel a lesson:

1. In the Go to: dropdown box, select Instruction.
2. Click on My Lessons Tab on the menu bar (this should appear by default).
3. In the Roster column, click on View of desired lesson.

Note: A lesson also can be cancelled from the Grade Lesson and Lesson Attendance pages.

4. Select Cancel from the Actions column.
5. Enter a reason for the cancellation in the text box.
6. Click the Save link at the bottom of the page.

Evaluation

Viewing Lesson Critiques

You can view existing ones on the ***Critiques*** page for a lesson you are scheduled to teach.

To display the My Lesson Critiques page:

1. In the Go to: dropdown box, select Instruction.
2. Click on Lesson Critiques on the menu bar.
3. In the Roster column, click on View of desired lesson.
4. Click the name of an critique listed on the page to view its details,

Questionnaires are similar to tests, but are used primarily as evaluation tools for obtaining feedback from learners.

Viewing Questionnaires

Questionnaires are similar to tests, but are used primarily as evaluation tools for obtaining feedback from learners. As such, questionnaires are not scored or graded.

You can create questionnaires or view existing ones for a lesson you are scheduled to teach on the Questionnaire Administration page.

To display the Questionnaire Administration page:

1. In the Go to: dropdown box, select Instruction.
2. Click on Lesson Critiques on the menu bar.
3. Click on Create in the left navigation bar.
4. You can search for an existing questionnaire to view or edit it by entering search criteria in the sidebar and then clicking Go.
5. Enter a name and description for the questionnaire.
6. Click Save.
7. To create content for the questionnaire, click Next to display the questionnaire in Questionnaire Builder.
8. In the Control Bar frame, click the Questionnaire control.
9. In the Properties frame, do the following:
    a. Enter a name for the questionnaire.
    b. Optionally enter general instructions/information for the questionnaire.
    c. Specify whether you want the questionnaire to have sections.
    d. If the questionnaire has questions as child items:
        - Specify whether the questions for the questionnaire are displayed on a single page. If this option is not selected, each question appears on a separate page.
        - Specify whether the questionnaire permits learners to backtrack to previous questions.

          Note**:** Backtracking and single page display are mutually exclusive options.
    e. Specify whether the questionnaire allows learners to save their changes without completing the questionnaire.
    f. Enter the other properties for the questionnaire.
    g. If you want the questionnaire to have sections, create sections for the questionnaire.
    h. Create multiple choice, true/false, and/or essay questions for the questionnaire.

You can add notes to any lesson you are scheduled to teach.

The Evaluation functions include creating, delivering, and recording critiques and providing for review of products and courses. Your function is to view Critique Results.

View Critique Results

Once critiques have been created by a Course Manager and completed by Learners, you have the ability to view the results of the critique. You would view the critique results to assess the successes or shortcomings as documented by the critiques.

To view the results for a critique:

1. Select Collaboration from the Go-to: Drop-down list and select the Critique tab.
2. Search for the name of the critique; click the name of the desired critique.
3. In the View Critique page, click the View Results link in the right-top corner. The View Results by Learner page appears displaying all the submitted responses for the critique.

See Also
See TAB 64: Critiques
See TAB 65: Creating Critiques
See TAB 66: Searching for Critiques
See TAB 67: Closing a Critique

Training Management

The Training Management function includes functions associated with the administration of the LMS. Your function is to create reports.

Create Reports

The LMS provides pre-defined reports on a wide range of data. You can access data and reports in some or all of the modules found in your drop-down list, with the exception of My Home. Exactly what you will see depends on your role and your security privileges. Once you select one of the modules in the drop-down, the LMS displays the Reports tab, which lists the available reports for that module. Some reports may be available within multiple modules. For example, “Classroom Instructor Assignments” may appear under “Lessons,” “Instruction,” and “Resources” since not everyone has access to all three modules.

Once you have located the desired report, select it. Depending on the contents of the report, the LMS may prompt you to enter more information before the report is generated (e.g., the “Roster” report prompts you for the lesson number). After you enter any additional data, the LMS generates and displays that report. From the report displayed on the screen, you can print out the report, export it as a file to your computer, or search the text.

When you request a report from over the web, you must be careful that you get the correct data. If you attempt to run the same report a second time but with new information (e.g., a new lesson number), your browser may call up the first report from the memory cache on your computer. To avoid this, click the Refresh icon on the Reports viewer. The report data will be refreshed according to your new entries.

Running/Viewing System Reports

To run/view a system report in the LMS:

1. Access the LMS.
2. Choose one of the modules from the drop-down list. The system displays the tabs for the module. If the module supports running reports, a Reports tab is displayed.
3. Click the Reports tab. A list of the system reports that have been assigned to the current module is displayed. If no system reports have been assigned to the current module, the page does not display any reports.
4. Select the name of the report you wish to run.

    - If required, enter parameter information and click Submit. If no parameter fields appear, simply click Submit.

LEARNING MANAGEMENT SYSTEM

Chapter 5

Product Distributor

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Product Distributor's Functions within the LMS

In this chapter, you will build on the functions that you learned in Chapter 1 and Chapter 2 to obtain a greater understanding of the LMS and the system functions you will use in the role of a Product Distributor (PD). Listed below are the modules that are accessible in the LMS for the PD role, together with the Tabs (from the Tab Bar), associated with that module, and the links located in the left navigation bar associated with each Tab. Modules are found by clicking within the **Go- to** drop down box in the upper right quadrant of the LMS screen.

Go-to:	Tab	Left Navigation Bar
My Home This module (the default module for all users) allows you to view your training information including transcript and registrations as well as search the catalog and launch collaboration functions.	My Home	Registrations Development Plan Search Training Catalog Find Experts Find Communities Order History Transcript NOTE: Some Users may have more links.
	My Development	Registrations Transcript Skills Skill Gap Development Plan Course Progression Individual Training Plan
	Training Catalog	No links – only search capability.
	Information Resources	No links – only information
	Collaboration	Communities of Practice Personal Communities Create Communities Q & A People Online
	Experts	Find Subject Matter Experts Communities in which I am an Expert
	Assessments	Assess Others Critiques

Go-to:	Tab	Left Navigation Bar
	Personal Info	Main Information Lesson Requests Job Profile Personalize Catalog Personalize Homepage
Catalog This module allows you to create, edit, and delete catalog items, including products, courses, and instructional units.	Curriculum	Create Search
	Lesson Template	Create Search
	Product	Create Search
	Course Iteration	Create Search
	Roster Template	Create Search
	Courses	Create Search
	Library	Search
	Reports	(See list on Main screen)
Registrar This module allows you to view and manage your unit(s), including registering members of your unit for training.	User	Search
	Unit	Search
	Training Catalog	Search

Resource and Event Scheduling

The Resource and Event Scheduling functions allow for short range scheduling (less than one year) of Instructors, classrooms, equipment, and materials; production and distribution of schedules; and changing of schedules. Your function is Create, Assign Inventory.

Create, Assign Products and Inventory

Inventory items are physical products that are available for ordering. These may be:

- Products that appear in the Training Catalog
- Products that are used as resources for courses and lessons, such as manuals, notebooks, etc.

You will need to insert and update products so Learners can request them or insert and update inventory so resource managers can schedule them. Inventory items used as resources can be assigned to one or more locations. Assigning a location and specifying a quantity at the location enables the item to be specified as a resource for course and lesson iterations. Alternatively, the item may be shipped to students before iterations begin.

Creating Products and Inventory – Entering products and inventory in the LMS for the first time. For the purposes of the LMS, creating product and inventory entries are the same

thing. The only difference is when you are creating a product; there is a check box to allow the product to be used as a resource. Checking that makes the product a product as well as inventory.

Assigning Inventory to Locations

Inventory is managed by location. Once the inventory has been created, you must assign it to locations so that it can be managed and scheduled. Additionally, when the inventory quantity at a location changes, you would use this process for updating that information.

Assigning an inventory location to a product indicates that the product is available at that location. When you assign a location to a product, you specify the quantity that is available at the location, as well as a reorder quantity. This process is also used for updating inventory quantities.

To assign one or more inventory locations to a product in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu.
3. Search for the product or inventory using the search criteria fields and click Go.
4. Click the Edit icon next to the item needed updating.
5. Click the **Inventory Locations** link in the left sidebar to display the ***Inventory Locations*** page. Note that this link will not appear for web-based products.
6. You can either add inventory to a particular location or edit an existing inventory quantity.

    - **To add inventory**: Enter the location and quantity (required) and additional information (optional) and press the Add button.
    - **To update inventory**: Click the Edit icon. Use the Change drop-down list to edit the location, quantity, and re-order quantity. To update the Work Bin Location, Bulk Bin Location, or Weight simply type over the existing entries and press Update. To return, click the Inventory Locations link in the left sidebar.

Create and Edit Product Data

Create Product Data

This process is used for creating training products in the LMS, such as CD-ROMS, as well as creating inventory. To create products (and inventory) in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu and click the **Create** link in the left sidebar to display the page for creating a new product.
3. Enter the ***required*** information for creating the product:

The following table describes the types of information required to create products and inventory in the LMS.

Required Information	Description
Product Group	Select the product group under which the product is classified in the Product Catalog.
Part Number	Enter a part number for the product. You must enter an alphanumeric string that uniquely identifies the product. Part number can be used to search for and order the product. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. Note If the prefix appears, do not delete or change the prefix. The system requires product group prefixes to be included in all part numbers.
Name	Descriptive name of the product.
Category	User-defined category, which specifies the product type/media (e.g. WBT, Assessment Test, Video). The category also specifies whether the product is shippable or launchable/downloadable. For more information, see TAB 21: "Shippable Products"
Available From	Select the date the product will be available.

4. Enter any ***optional*** information for the product:

The following table describes the types of optional information used to create products and inventory in the LMS.

Optional Information	Description
Security Domain	Select a security domain for the product.
Discontinued From	Select the date after which this product is no longer available.
Available Quantity	(Display only) Displays the total number of units available at all the locations for the product. The field is incremented when you enter quantity numbers for the product in the Inventory page. The field is

	decremented when you add the item to an order. Note This field only applies to shippable products. For downloadable/launchable product, this field is empty.
Reserved Quantity	(Display only) Displays the total number of units that have been reserved for open orders. The field is incremented when the product is added to an order in an order. The field is decremented when the item in an order is shipped. Note This field only applies to shippable products. For downloadable/launchable product, this field is empty.
Training Units	Enter the number of training units to charge for the course. By entering a number in this field, you specify the lesson template as able to accept training units in place of other payment methods in customer orders. Note Training units are not affected by price bands or custom pricing.
Abstract	Enter an abstract, up to 1024 characters long, for the product.
Vendor	Select a vendor name for the product.
Manufacturer	Select a manufacturer name for the product.
Version	Enter a value if you want to track versions of the product. The LMS supports versioning and expiration of products, primarily to support using products in courses. Product completion entries, in contrast to lesson template/lesson completion entries, on the transcript have an additional field, Expiration Date, which stores the date a learner must complete the newest version of the product. The course expiration date always reflects the nearest expiration date of the newest version of the required catalog items in the course. If the newest versions of the required elements have no expiration date, then the course expiration date reverts back to its default expiration period starting on the date that the learner completed the last required product or product update. When a new version of a product is released which is required of certified or in-compliance learners, all previous versions are given an expiration date equal to the end of the grace period for the new version for all learners in the system. If a learner has not completed the most recent version of a product,

	then the expiration date for that product is displayed on the course details page, as is the course expiration date, so that learners can determine which product to complete first and which one correlates to the current expiration date for the course itself. The message `Yes, complete new product version(s)' will appear in the Need Re-certification column. Upon completion of the newest version of the product, the expiration date of older versions no longer matters since there is an entry for the newer version of the product on the learner's transcript that has no expiration date.
Display for Call Center	Select this check box to display the product in the Training Catalog for Call Center registrars (LMS).
Display for Web	Select this check box to display the product in the Training Catalog for learners, managers, and group administrators, as well as web registrars.
Internal	Select this check box to designate the product as orderable for employees.
External	Select this check box to designate the product as orderable for clients (external users).
Use as Resource	Select this check box to indicate the product can be used as inventory for lesson iterations. To create inventory, you must assign it to a location.

5. If your system administrator has defined any additional fields, the fields are displayed in the ***Custom Fields*** area. Enter information in the fields as required/desired.
6. Click **Save** to save your information.

Create a Product Version

The product main page includes a version field. To modify this field:

1. Select Catalog from the drop-down module list. Select the Product tab.
2. Search for the desired product.
3. Click the Edit icon next to the product.
4. Select Version from the drop-down list above the main information page.
5. Change the version and enter the appropriate reason.

When any change is made in this field (including creation of the product) and the product record is saved, the following occur:

Information is audited and stored in the product record:

- Revision date - entered by user
- Authorizing person - entered by user - free text

- Unique username of user making the change

The LMS will assume that the user has updated the content attachment accordingly. The LMS will not store audit records on the actual content that was attached to the product as this is done by the external document management system.

If the product is associated with any course, and the Expire all courses after complete by date check box is selected, the user is prompted with these options for expiration dates:

- For courses containing only this product, the complete by date is entered.
- For courses containing more than one product, the earliest of the complete by dates of all the products is used.
- For all learners who have the course, the current product is listed with an expired date.

This resets the expiration date for the impacted product for each learner who was in compliance to this new date. If the updated product has not been marked complete by midnight, server time, on that date, then at 12:00:00 AM the learner's course state moves to `Expired' status.

·Upon compliance with updated the course, if there is an expiration period for the course, the expiration date for the learner will be set to the current date + expiration period. If there is no expiration period, then the course will be in compliance with no expiration date.

Within the product details, a view-only list of courses is displayed that contains the product for reference purposes.

Note A product that is a subscribed item from an external catalog cannot be versioned.

Edit Product Data

After you have created the Product, you may edit the specified attributes or add additional information. To edit the product:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Product tab** and click the **Search** link in the left sidebar.
3. Enter the search criteria and press Go.
4. Find the desired product and click the Edit icon.
5. You can edit the information on the main page using the drop-down list above the main page information.
6. You can edit additional information (e.g., attachments, prerequisites) using the left sidebar links. See the links below for more information about that.

After the system creates the product, links to the pages are displayed. The links and their purpose is described in the following table

Link to Page	Purpose of Linked Page
Attachments	Use attachments to provide additional information, such as overviews,

	critiques, and abstracts, learning objectives, for the following objects: • Lesson Templates and Lessons • Products • Users • Manufacturers and vendors • Inventory items • Itineraries • Locations and facilities To add an attachment: 1. Click on the Attachments link in the left sidebar. This will display all attachments already added. 2. Click Add New in the lower half of the screen. 3. Enter any search criteria. 4. Select the appropriate item to attach. NOTE: In order to add an attachment to a product, you must first navigate to that product, either create it or edit it, then the Attachments link in the sidebar will be available.
Associated Content	The LMS supports the ability to deliver online learning content captured in a variety of formats. Some learning content is provided in formats that enable the LMS to inter-operate with the content and record the results of a learner's performance. This type of content includes standards-based content, such as AICC and SCORM, as well as proprietary content from leading content vendors such as NETg, SkillSoft, and SmartForce. Other types of content that can be delivered by the LMS include any file that uses a standard MIME type, any URL, and packages of files such as an HTML site. In the LMS, all learning content is imported, stored, and managed in the LMS Content repository. Using the Content module, content administrators can publish content to the Training Catalog for access by learners. Note Catalog administrators working in the Catalog module cannot capture learning content or associate learning content with products. When publishing content to the Training Catalog, content administrators can publish content to existing lesson template, lessons, or products, or they can publish to new lesson template, lessons, or products. Important Each catalog item can have only one content object associated with it.

	For complete information about using the LMS Content repository to capture, manage, and publish learning content, see the online help for the Content module or the LMS Content Administrator Guide. To view content associated with a product in the LMS: 1. Select Catalog in the Go to: drop-down list. 2. Click Product on the menu, enter criteria in the search fields, and click the Go button in the left sidebar to display a list of products you can edit. 3. Click the Associated Content link in the left sidebar to display the Associated Content page. 4. Click the title of a piece of content to view its details.
Skills	Skills assigned to a product are granted to learners who successfully complete the product. When a skill is assigned to a product, you also specify the proficiency level that will be granted to learners when they complete the product. To assign skills to a product in the LMS: 1. Select Catalog in the Go to: drop-down list. 2. Click Product on the menu. 3. Create a product or find an existing product that you can edit. 4. Click the Skills link in the left sidebar to display the Skills page. 5. Select a skill group from the drop-down list. 6. Find a skill using the Finder. 7. Select the proficiency that will be granted for the skill when the product is successfully completed by a learner. 8. Click the Add button to list the skill at the top of the page. You can delete any listed skill by clicking the delete icon to the right of the listing.
Prerequisites	To specify other catalog items as prerequisites for a product in the LMS: 1. Select Catalog in the Go to: drop-down list. 2. Click Product on the menu. 3. Create a product or find an existing product that you can edit. 4. Click the Prerequisites link in the left sidebar to display the Prerequisites page. 5. Select a product type from the drop-down list box and click the Find button to list catalog items at the bottom of the page.

	6. Click the + icon next to a product to list it at the top of the page as a prerequisite. They can be added as either required or recommended. You can delete any listed prerequisite by clicking the delete icon to the right of the listing.
Equivalents	To specify other catalog items as equivalents for a product in the LMS: 1. Select Catalog in the Go to: drop-down list. 2. Click Product on the menu. 3. Create a product or find an existing product that you can edit. 4. Click the Equivalents link in the left sidebar to display the Equivalents page. 5. Select an equivalents group and category from the drop-down list boxes and click the Find button to list equivalents at the bottom of the page. 6. Select one or more check boxes next to listed items and click Done to list the items at the top of the page. You can delete any listed equivalent by clicking the delete icon to the right of the listing.
Keywords	To specify keywords for a product in the LMS: 1. Select Catalog in the Go to: drop-down list. 2. Click Product on the menu. 3. Create a product or find an existing product that you can edit. 4. Click the Keywords link in the left sidebar to display the Keywords page. 5. Select a keyword from the drop-down list box and click the Add button to list the keyword at the top of the page. You can delete any listed keyword for the product by clicking the delete icon to the right of the listing.
Audit Trail	The audit trail list the modifications made to the LMS item. It lists the user who changed it and the attributes along with the date and time.
Courses	Courses can contain products that learners need to complete to acquire the course. To view courses associated with products in the LMS: 1. Select Catalog in the Go to: drop-down list. 2. Click Product on the menu.

	3. Create a product or find an existing product that you can edit. 4. Click the Courses link in the left sidebar to display the Courses page. Any courses associated with this product will be listed. NOTE: Products are added to courses by using the **Courses** wizard.
Inventory Location	Assigning an inventory location to a product indicates that the product is available at that location. When you assign a location to a product, you specify the quantity that is available at the location, as well as a reorder quantity. This process is also used for updating inventory quantities.
Internationalization	Functionality Not Used in System Release.
Notes	Notes can be added to any object in the LMS. The LMS maintains a history of all the notes that have been entered for an object. In addition, to enable more efficient searches for notes, you can define categories and assign these categories when entering notes. For example, you could define categories such as Phone conversations, Meetings, Demos, E-mails sent, and E-mails received for the notes you enter.

Product Distribution

The Product Distribution functions provide for the transmission and delivery of physical and electronic products to the Learners
Your functions are:

- View Shipment Lists
- Print Shipping Labels.

View Shipment Lists

The LMS provides you with access to shipment lists for ATRRS and ACCP products. You would access these shipment lists to determine the items that need to be shipped, when they need to be shipped, and where they need to be shipped. To view the shipment list for ATRRS and/or ACCP products, follow these steps:

1. Select Registrar (Internal) from the Go-to: Drop-down list.
2. Select the Order History tab.
3. Scroll down the left sidebar to the section titled “Create Today’s Shipment List for:”
4. Select either ATRRS or ACCP by clicking on the respective button. This will launch another window, which will ask you for your password.

5. Enter your password and the shipment list will display. From this page, you can also print the list.

An alternative method for accessing the shipment list is follows. Both methods achieve the same results.

1. Select Registrar (Internal) from the Go-to: Drop-down list.
2. Select the Reports tab.
3. Find the ATSC ATRRS inventory pick list or ATSC ACCP inventory pick list.
4. Enter any required parameters, such as Report Date, using the calendar picker icon and press Submit.
5. This will display the shipment list; from this page you can print the list.

Print Shipping Labels

The LMS provides you access to print shipping labels for ATRRS and ACCP products. These labels need to be printed and places on products before they are shipped.

To print the shipping labels for ATRRS and/or ACCP products, follow these steps:

1. Select Registrar (Internal) from the Go-to: Drop-down list.
2. Select the Reports tab.
3. Find the ATSC ATRRS SHIPPING LABELS or ATSC ACCP SHIPPING LABELS.
4. Enter any required parameters, such as Shipping Date, using the calendar picker icon and press Submit.
5. This will display the shipping labels, which you can print from the display by click on the printer icon.

Shippable Products

Shippable products are physical goods that must be shipped to the learner to deliver the learning (e.g. printed material, video cassette, CBT on CD-ROM).
Shippable products have the following attributes:

- Appropriate physical product category (e.g. Book, Video, CBT). For more information about categories for products, see "Product Catalog Categories"
- One or more locations and quantities at each location.

If no quantity exists at any locations, the product can be ordered; however it goes into a back-ordered state. A back-ordered product cannot be marked shipped or delivered until a quantity is available for shipment at a location for the product.

- Typically, a shippable product does not have content associated with it. The content is contained within the actual product shipped.

When a shippable product is ordered, it appears in the ***Registrations*** page for the learner who ordered it (regardless of whether the learner is a group administrator or not).
All learners can order quantities of shippable products through the LMS.

Locations for Shippable Products

You can assign a shippable product to one or more locations and specify the quantity at each location. Assigning a product to a location enables the product to be shipped from the location to fill orders. The total quantity for all locations equals the available quantity for the product; however, the system also tracks the quantity of products that have been reserved for orders. When the product is shipped to fill an order, the quantity reserved and the available quantity both are decremented.

Delivery of Shippable Products

The LMS provides functionality for shipping products to Learners, and for tracking those shipments. When you create a shipment for an order, you specify a location from which the ordered products are shipped.

Launchable/Downloadable Products

Launchable/downloadable products are non-physical goods (e.g. WBTs and Assessments) that are in electronic format and, as a result, can be accessed online or downloaded to a learner's local computer. Because they are in electronic format, you do not need to maintain an inventory that is decremented every time the product is ordered and shipped.

Electronic Categories for Products

A product is designated as launchable/downloadable by assigning it an electronic product category (e.g. the predefined category `WBT'). When a product has an electronic category, the product does not require shipment to be marked as delivered in the LMS. As a result, the product does not need to be assigned to locations. In addition, launchable/ downloadable products can be assigned directly to learners. When the learners complete the product, their profile can be updated to give them credit for the product. In contrast, products that have a physical category (i.e. shippable products) must be manually marked as shipped and delivered before orders containing the product can be invoiced. As a result, the product must have a quantity available at a location to be shipped.

For more information about categories for products, see "Product Catalog Categories"

Online Access (Launchable Products)

Online-access, launchable/downloadable products, also known as web-based or online learning products, are delivered to individual learners through a network connection. The connection allows learners to access and interact online with the content for the product. Some examples include WBTs and streamed video. If the content is AICC-compliant or from one of the content providers supported by the LMS, then the LMS tracks the progress and results of the learner.

Local Access (Downloadable Products)

Local-access launchable/downloadable products are items for which the actual content is a file attached to the products. The product is delivered to the learner by the learner downloading the content for the product from a server on a network to their local machine. The learner completes the content by accessing/interacting with the content on their local machine, disconnected from the server where the content originated. Some examples include electronic books, online videos, and CBT programs.

Product Catalog Categories

Product catalog categories are used for two main purposes:

1. Classifying products (items that appear in the Training Catalog).

NOTE: some examples of categories you may define for use with products include: cd-roms, cbts, videos, books, class notes.

2. Classifying resource inventory items (items used as resources in courses and lessons).

NOTE: some examples of categories you may define for use with resource items include: class notes, books, product manuals, notebooks, note pads, pencils, diskettes, and collateral (i.e. Items, such as t-shirts, coffee mugs, etc., that you give away in class).

Course and Package Categories

The **Course** and **Package** product categories are special categories that the LMS uses for displaying courses and packages in the Learning Catalog. These categories cannot be modified. In addition, they cannot be assigned to any products. The LMS automatically assigns them to each course or package created by catalog administrators.

The LMS provides some predefined product catalog categories (e.g., **Courses**, **Packages**, **WBT**, and **Assessment Tests)**. As a result, you do not need to create categories for these types of catalog items. For all other resource inventory items and products that you wish to track in the LMS, you must create categories.

The following table lists the types of business objects for which the LMS provides predefined records. These records represent entities that are commonly found in education services operations. The records can be edited, deleted, or used as templates for creating similar records. The following table contains some example record types and values. This list is amendable and will change as needed.

Object Type	Record Type	Record (Value)
Category Definitions (Product Catalog)	Electronic Physical Physical Physical Physical Physical Electronic	Assessment Book CD Instructor Kit Student Kit Video WBT
Category Definitions (Equipment)	N/A	CD-ROMs Computer Floppy Disks

Object Type	Record Type	Record (Value)
		LCD Projector Overhead Projector Slide Projector TV VCR Video Camera Video Tapes
Provider Types (Facility)	N/A	Internal Training Facility Media Production/Broadcast Rented Training Facility Vendor Training Facility
Session Templates	Ad-hoc	M-F 9-5 M-Th 9-5 M-W 9-5 T-Th 9-5 T-F 9-5 W-F 9-5 M, W, F 9-5 T, Th 9-5 M, W 9-5 W, F 9-5 M 9-5 T 9-5 W 9-5 Th 9-5 F 9-5

LEARNING MANAGEMENT SYSTEM

CHAPTER 6

UNIT TRAINING MANAGER

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Unit Training Manager Functions within the LMS

In this chapter, you will build on the functions that you learned in Chapter 1 and Chapter 2 to obtain a greater understanding of the LMS and the system functions you will use in the role of a Unit Training Manager. Listed below are the modules that are accessible in the LMS for the Unit Training Manager role, together with the Tabs (from the Tab Bar), associated with that module, and the links located in the left navigation bar associated with each Tab. Modules are found by clicking within the **Go- to** drop down box in the upper right quadrant of the LMS screen.

MODULE	TAB	Left Navigation Bar Link
My Home This module (the default module for all users) allows you to view your training information including transcript and registrations as well as search the catalog and launch collaboration functions.	My Home	Registrations Development Plan Search Training Catalog Find Experts Find Communities Order History Transcript
	My Development	Registrations Transcript Skills Skill Gap Development Plan Course Progression Individual Training Plan
	Training Catalog	Search (Full Catalog & Lesson Only)
	Information Resources	AKO link
	Communities	Communities of Practice Personal Communities Q & A People Online Search
	Experts	Find Subject Matter Experts Communities in which I am an Expert Search
	Assessments	Critiques

MODULE	TAB	Left Navigation Bar Link
	Personal Info	Main Information Lesson Requests Job Profile Personalize Catalog Personalize Homepage Search (Order History)

UTM Specific Functions

Module	Tab	Left Navigation Bar Link
My Team This module allows you to view training information about your unit and direct reports, as well as approve training request.	Team Summary	List of your direct reports
	Profiles	List of your direct reports
	Courses	List of your direct reports
	Initiatives	List of your direct reports
	Compare Skills	
	Ad Hoc Learning	List of your direct reports
	Reports	(See list on Main screen)

Registrar (Internal) This module allows you to view and manage your unit(s), including registering members of your unit for training.	User	Search
	Unit	Search
	Training Catalog	Search
	Ad Hoc Learning	
	Lesson Requests	
	Order History	Search
	Reports	

People This module allows you to view user's information as well as create and view LMS roles and MOSs.	User	Search
	Internal MOS / Career Field	Search
	Internal Role	Search
	Reports	(See list on Main screen)

To successfully perform your role as Unit Training Manager (UTM) and navigate through the automated LMS, you will communicate with a variety of individuals either electronically or in person. These individuals have other responsibilities within the system, such as Learning Approver, Instructor, and Product Distributor. For a description of these individuals and their responsibilities, see Appendix A: LMS Roles and Responsibilities.

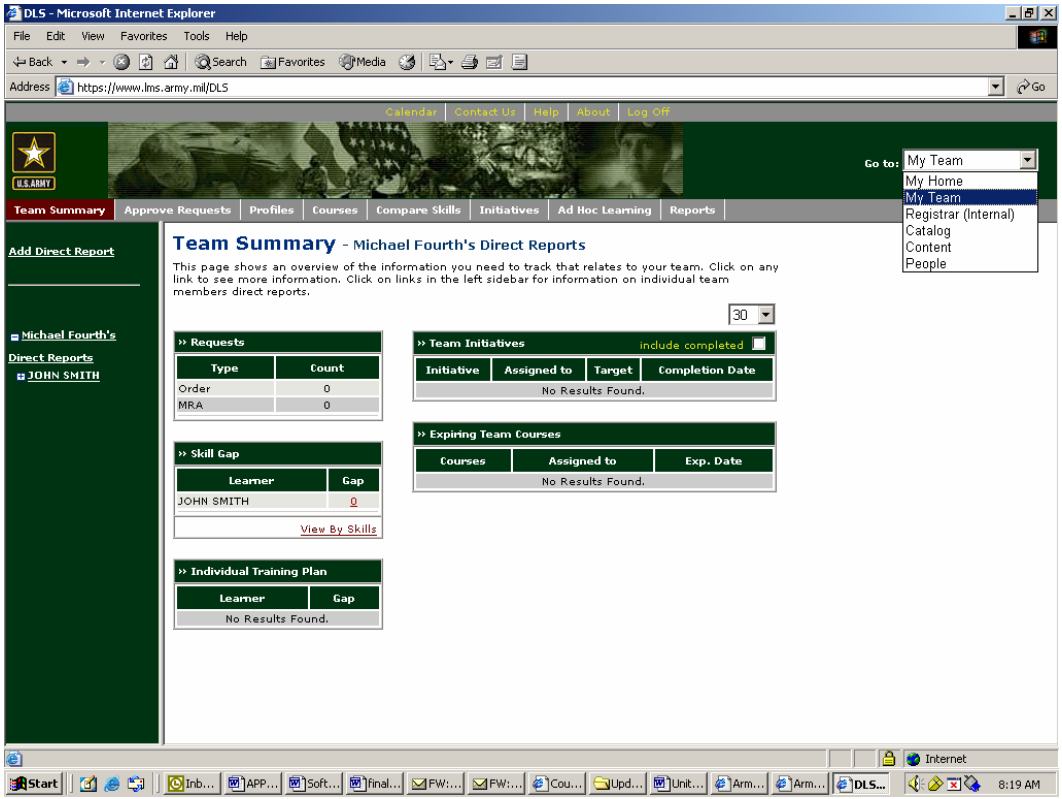
Activation of the "My Team" module

Many of the tasks associated with this role require the user to access the **My Team** module from the **Go To:** drop down box. **This module will not appear as one of your selection choices unless you properly set it up!**

Here are the instructions to set up the My Team dropdown:

1. Click on the **People** module in the **Go To:** drop down box.
2. Search for a person.
3. Select the person using the icon to the left of the person's name. This brings up that person's individual information screen.
4. Put yourself down as his/her Manager in the "manager" field using the magnifying glass icon at the right of that field to search for your name in the system. Click the "plus" sign at the left of your name in the pop up screen that appears. This will insert your name to the "manager" field in the person's information page.
5. Click the save link at the bottom right of the person's information screen.
6. Log off the LMS and log back in.

The **My Team** module should appear in the drop down box to access the My Team page as shown below:



Registration

The Registration functions allow registration for a course or individual product. They also provide the approval process and perform eligibility and prerequisite checks. If maximum registration limits are exceeded, waitlists are established and managed. Your functions include:

- Register Direct Reports
- Cancel Direct Reports' Registrations.

Register Direct Reports

To take a course with the LMS, a Learner must first request registration. There are two types of processes used:

- To register for an ATRRS-managed course you must use the ATRRS System. Most courses are listed in the catalog. If you attempt to register for an ATRRS-managed course, you will get a message saying: "You must use the ATRRS to register for this course."
- Registration for all other courses is accomplished through the LMS.

As a manager of other Learners under your direct supervision, you have the capability to register your direct reports (those Learners who report directly to you), for courses and products in the Training Catalog of the LMS. This may be done for an individual student or an entire unit. Once you have registered Learners or ordered items for them, the courses or products appear in Registrations, and any manager approval is overridden.

Also, when you request the classroom seats for a lesson, you have the option of assigning them to specific Learners or simply reserving them. However, the seats must be assigned before lesson delivery can be marked complete. These Learners will be under your direct training supervision.

Managers can register learners who belong to their group for catalog items. Once the registrations are created (and approved, if necessary), the registration appears in the learner's **Registrations** page and the order is listed in the learner's **Order History** page.

To order items for other learners:

1. Select **Registrar** from the drop-down list.
2. Click the **Training Catalog** tab.
3. Enter criteria in the search fields and click **Go** to display a list of catalog items.
4. Click the shopping cart icon in the Register column to display the Confirm Your Request pop-up window.
5. Select **Add Learners** from the **Action List** drop-down to display the Group Registration window.
6. Enter search criteria and click **Go** to list learners.
7. Select one or more learners and click **Add**. You can add your own name if desired. You can also select **Reserve seats** from a drop-down list next to a listed item. Entering a number of seats to be reserved will add more copies of the catalog item to the order list. You can delete an item from the list by clicking the delete icon. When

you add a learner or reserve a seat, the system adds an extra line that you should delete.

8. Enter your password.
9. Click the **Checkout** button to display the Order Receipt window.

Note You can also order items for learners through the My Home module by using the **Training Catalog** tab.

Once you close the confirmation window, you can only access the window by adding a new item to the cart.

Cancel Direct Reports' Registrations

As the UTM, you can cancel view and cancel a registration made by one of your direct reports through the Profiles tab of the My Team Module. You can select the direct report, view the registrations, and click on the Cancel Icon beside the desired course.

To cancel registrations:

1. Select **Registrar** from the drop-down list.
2. Click the **Order History** tab.
3. Enter criteria in the search fields and click **Go** to display a list of orders.
4. Click the Order Number link to view order details.
5. Click the **Modify** button to display the Modify Order Item page.
6. Click the **Cancel Item** button.

Training Management

The following training management functions for your role in the management of the Learning Management System are:

- View Your Team (Direct Reports)
- Add Direct Reports
- Create Reports
- Find User Roles.

View Your Team (Direct Reports)

If a Learner is in your list of direct reports (those who report to you for approval of training requests), you have the ability to view his/her information. This would be helpful for determining their other training commitments before approving learning. As a Unit Training Manager, you can view the profiles of each direct report on your team which include:

- Registrations
- Transcripts
- Skills

- Skills Gap
- Development Plan
- Course
- Individual Training Plan
- Job Profile

For additional details, see TAB 22, “View Your Team (Direct Report)

Add Direct Reports

If you are assigned as a Unit Training Manager for Learners in the LMS, you must add them to your list of direct reports before you can approve training requests or training information. A Learning Approver or Unit Training Manager can add direct reports to their My Team page by following these steps:

1. Select **My Team** from the drop-down and click on the **Team Summary Tab**.
2. Click on the **Add Direct Report** link in the left navigation bar.
3. Type the first few letters of the user's first or last name and click Search.
4. Click on the name of the person you would like to add as your direct report.

Once you have added a user as your direct report, you will have access to view information about their account, such as registrations and transcript.

Create Reports

The LMS provides pre-defined reports on a wide range of data. You can access data and reports in some or all of the modules found in your drop-down list, with the exception of My Home. Exactly what you will see depends on your role and your security privileges.

Once you select one of the modules in the drop-down, the LMS displays the Reports tab, which lists the available reports for that module. Some reports may be available within multiple modules. For example, “Classroom Instructor Assignments” may appear under “Lessons,” “Instruction,” and “Resources” since not everyone has access to all three modules.

Once you have located the desired report, select it. Depending on the contents of the report, the LMS may prompt you to enter more information before the report is generated (e.g., the “Roster” report prompts you for the lesson number). After you enter any additional data, the LMS generates and displays that report. From the report displayed on the screen, you can print out the report, export it as a file to your computer, or search the text.

When you request a report from over the web, you must be careful that you get the correct data. If you attempt to run the same report a second time but with new information (e.g., a new lesson number), your browser may call up the first report from the memory cache on your computer. To avoid this, click the Refresh icon on the Reports viewer. The report data will be refreshed according to your new entries.

Running/Viewing System Reports

To run/view a system report in the LMS:

1. Access the LMS.
2. Choose one of the modules from the drop-down list.

   The system displays the tabs for the module. If the module supports running reports, a **Reports** tab is displayed.

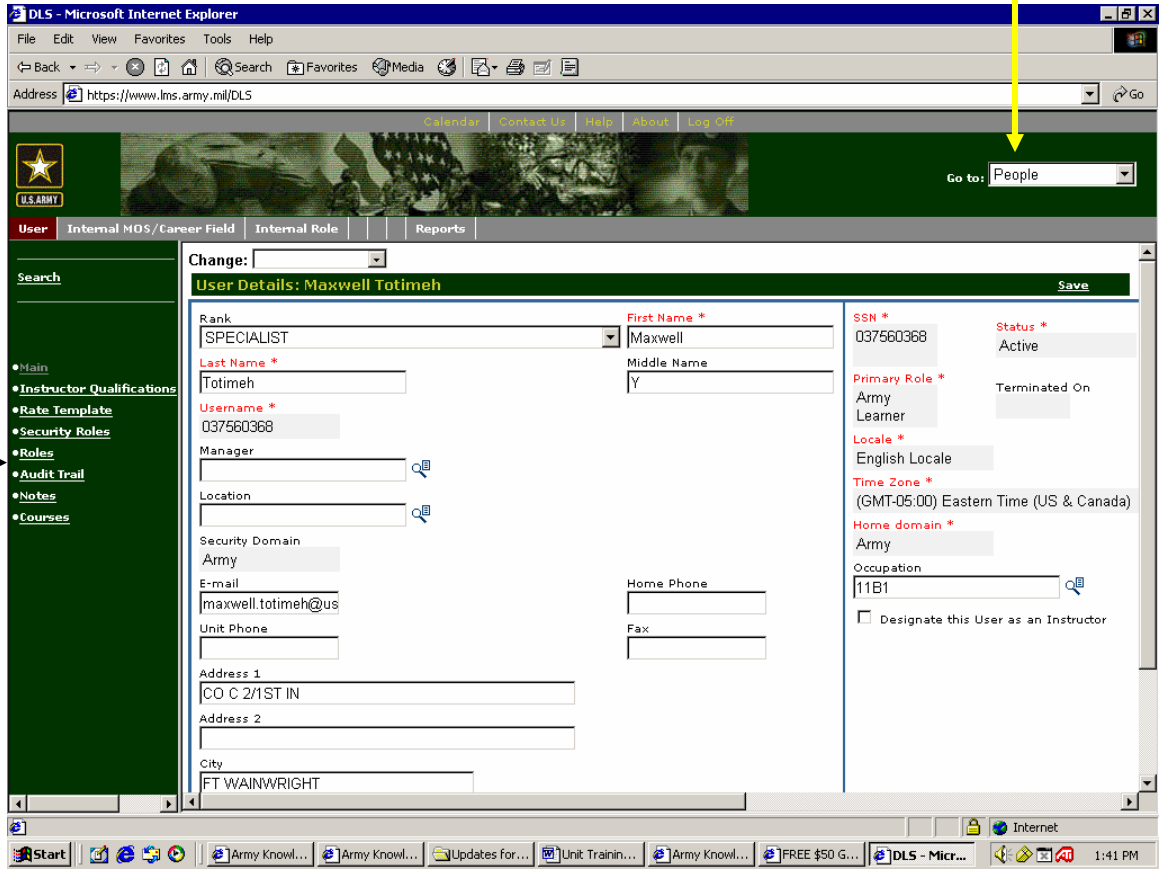
3. Click the **Reports** tab. A list of the system reports that have been assigned to the current module is displayed. If no system reports have been assigned to the current module, the page does not display any reports.
4. Select the name of the report you wish to run.
5. If required, enter parameter information and click Submit. If no parameter fields appear, simply click Submit.

Find User Roles

The LMS allows you to view the roles of other users. To accomplish this follow the steps below:

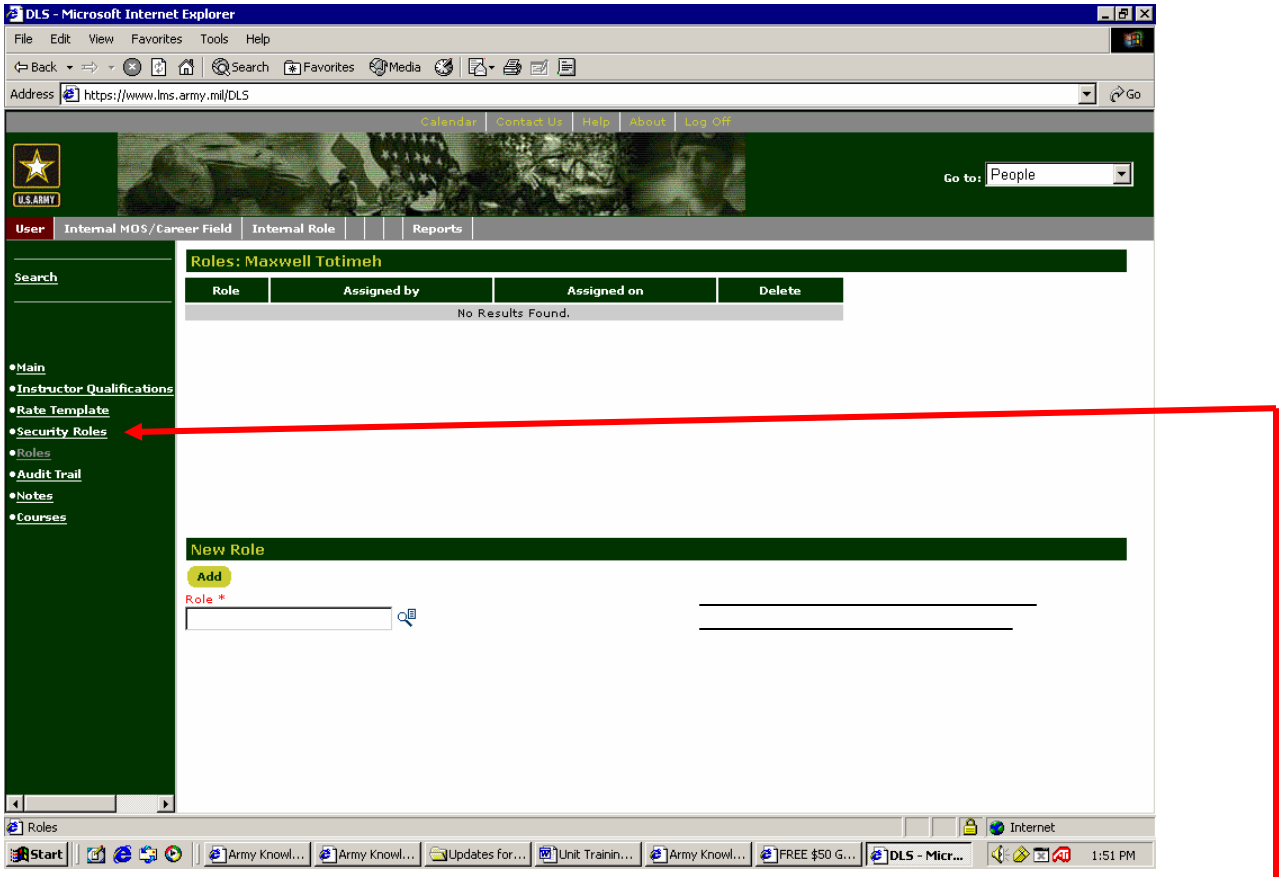
1. Select People from the Go-to: Drop-down list.
2. Enter the criteria for the specific user and select Go.
3. Select the Edit icon beside the desired user name.

Results of step 2 above



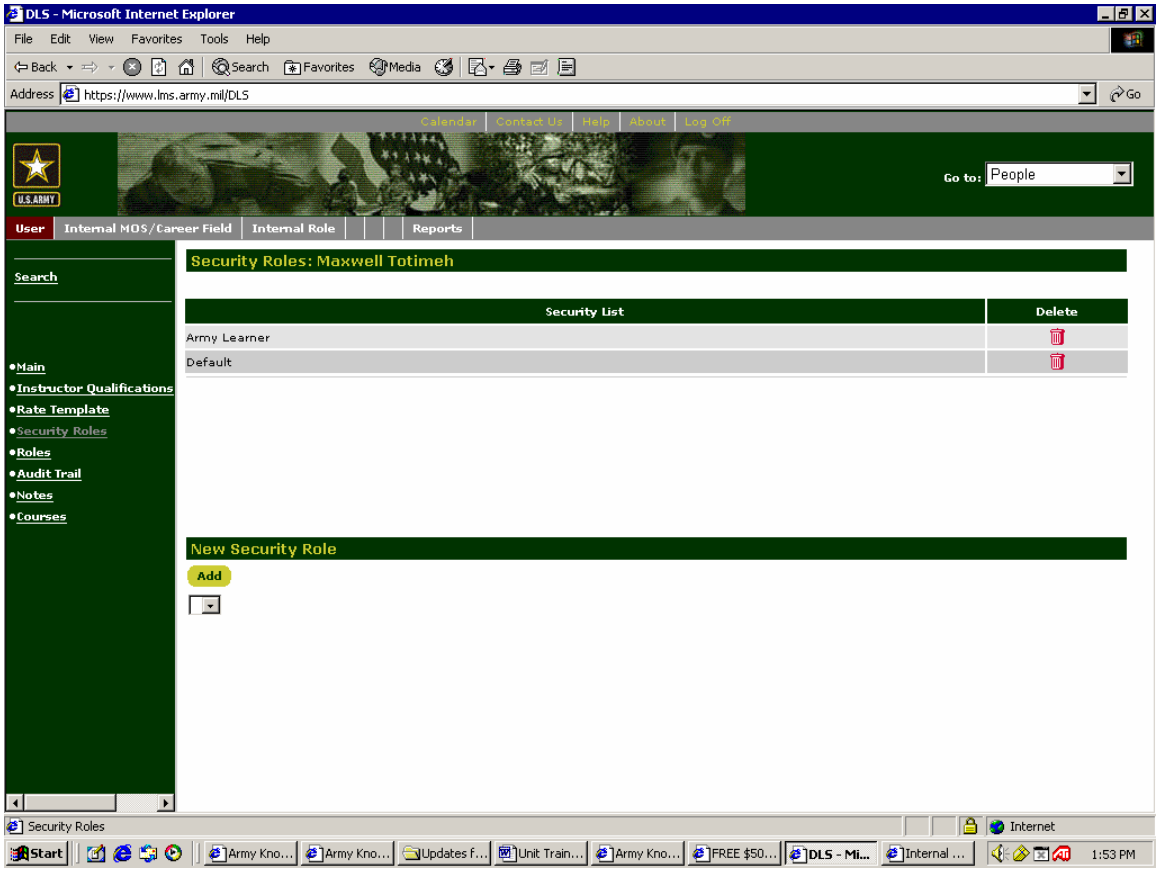
4. Click on the Roles link in the left navigation bar

Results of step 4 above
Roles Link



5. If the user is associated with other roles, those will be listed in the **Security Roles** link in the left sidebar. Click on the **Security Roles** list to find any additional roles associated with the user.

Results of step 5 above
Security Roles Link



LEARNING MANAGEMENT SYSTEM

Chapter 7

Learning Approver

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Learning Approver Functions within the LMS

In this chapter, you will build on the functions that you learned in Chapter 1 and Chapter 2 to obtain a greater understanding of the LMS and the system functions you will use in the role of a Learning Approver. Listed below are the modules that are accessible in the LMS for the Learning Approver role, together with the Tabs (from the Tab Bar), associated with that module, and the links located in the left navigation bar associated with each Tab. Modules are found by clicking within the **Go- to** drop down box in the upper right quadrant of the LMS screen.

Go-to:	Tab	Left Navigation Bar
My Home This module (the default module for all users) allows you to view your training information including transcript and registrations as well as search the catalog and launch collaboration functions.	My Home	Registrations Development Plan Search Training Catalog Find Experts Find Communities Order History Transcript NOTE: Some learners may have more links.
	My Development	Registrations Transcript Skills Skill Gap Development Plan Course Progression Individual Training Plan
	Training Catalog	No links – only search capability.
	Information Resources	No links – only information
	Collaboration	Communities of Practice Personal Communities Create Communities Q & A People Online
	Experts	Find Subject Matter Experts Communities in which I am an Expert
	Assessments	Multi-Rater Assessments Assess Others Critiques
	Personal Info	Main Information Lesson Requests Job Profile Personalize Catalog Personalize Homepage
My Team This module allows you to view training information about your unit and direct	Team Summary	List of your members in your organization
	Profiles	List of your members in your organization
	Courses	List of your members in your organization
	Initiatives	List of your members in your organization
	Compare Skills	
	Ad Hoc Learning	List of your members in your organization

Go-to:	Tab	Left Navigation Bar
reports, as well as approve training request.	Reports	(See list on Main screen)
People This module allows you to view user's information as well as create and view LMS roles and MOSs.	User	Search
	Internal MOS / Career Field	Search
	Internal Role	Search
	Reports	(See list on Main screen)
Information This module allows you to add information resources to Learner's homepages. This would primarily be used for adding URL links.	Homepage	
	Information Category	Search

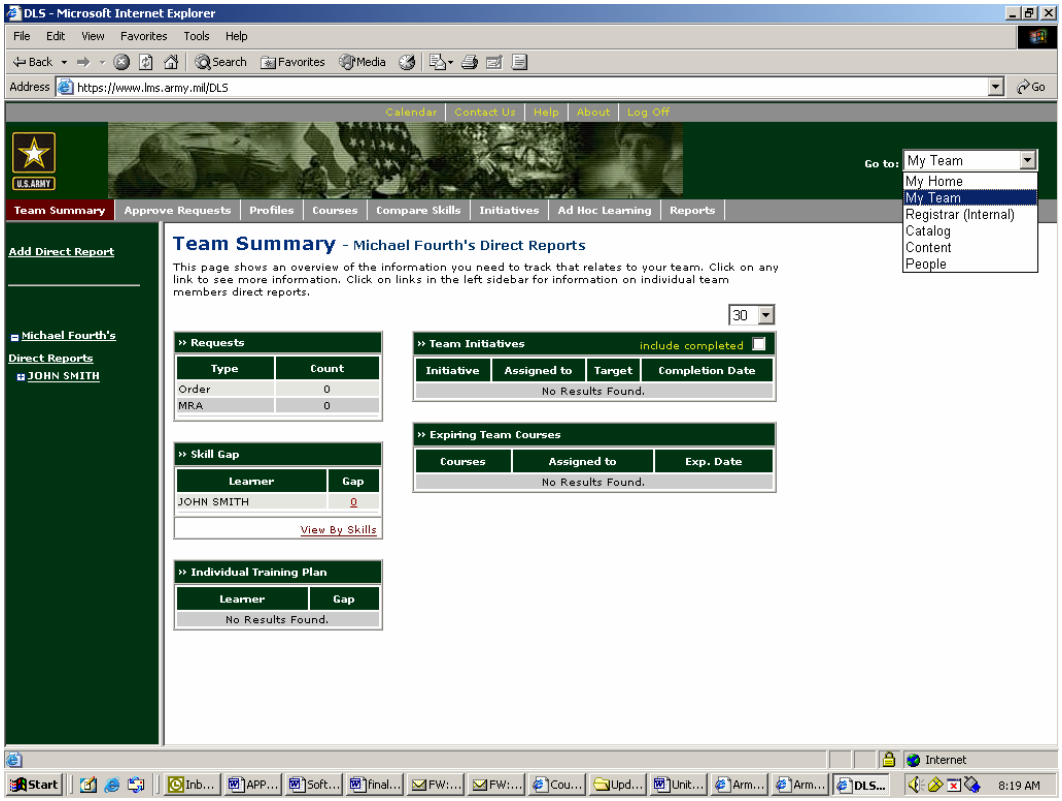
Activation of the "My Team" module

Many of the tasks associated with this role require the user to access the **My Team** module from the **Go To:** drop down box. **This module will not appear as one of your selection choices unless you properly set it up!**

Here are the instructions to set up the My Team dropdown:

1. Click on the **People** module in the Go To drop down box.
2. Search for a person.
3. Select the person using the icon to the left of the person's name. This brings up that person's individual information screen.
4. Put yourself down as his/her Manager in the "manager" field using the magnifying glass icon at the right of that field to search for your name in the system. Click the "plus" sign at the left of your name in the pop up screen that appears. This will insert your name to the "manager" field in the person's information page.
5. Click the save link at the bottom right of the person's information screen.
6. Log off the LMS and log back in.

The **My Team** module should appear in the drop down box to access the My Team page as shown below:



Registration

The Registration functions allow registration for a course or individual product. They also provide the approval process and perform eligibility and prerequisite checks. If maximum registration limits are exceeded, waitlists are established and managed. Your functions include:

- Approve Registration Requests
- Create Bulk Registrations Requests.

Approve Registration Requests

If a Learner requests registration for a training item (course, lesson, or product) that requires your approval, you are notified that there are approvals pending for that Learner. If you approve the request, the Learner is sent a confirmation notice. If you deny the request, the Learner is notified and the request is canceled.

Learning Approvers can approve or disapprove catalog items that learners have requested, when approval is needed. When a learning approver or manager requests a catalog item for a learner, it is automatically approved.

To approve catalog items for team members:

1. Select **My Team** from the drop-down list.
2. Click the **Approve Requests** tab. The Approve Requests section appears at the top of the page.

3. Approve or disapprove requests by selecting Yes or No in the **Approve** column. You can select all items by checking the **Select `Yes'/'No' for All** box.
4. Click the requester's name to view detail information about that person. You can send an email message to that person by clicking the email address link on the detail page.
5. Click the order number to see more information on the item.
6. Click the **Submit** button to save the changes. You can click the **Reset All Approvals** button to clear any changes you made since opening the page.

Create Bulk Registration Requests

As a Learning Approver, you can create registrations for part or all of your organization. Select My Team from the Go-to: Drop-down list and select the Courses tab. After you have selected your team members, you can select courses or individual products from the Training Catalog for your team. To record completed events for your team, e.g., military ceremony or completing PRT, go to the Ad Hoc Learning Tab. After you have selected the team members, you can identify the event or product and grant credit.

Training Management

The Training Management function includes functions associated with the administration of the LMS. These functions range from accessing the LMS, to viewing your personal information, to running reports and maintaining databases. Your functions include:

- Personalize Your Homepage
- View Your Team (Direct Reports)
- Add Direct Reports
- Create Reports
- Find User Roles.

Personalize Your Homepage

After successful login, your Homepage will be displayed. The LMS permits you to customize your Homepage. You would customize your homepage if you wanted to view certain information every time you accessed the LMS, wanted certain links on your homepage, or simply wanted to re-arrange how it looked. As an LA, you can also customize your homepage with certain LA-specific information.

To customize your homepage as a *Learning Approver*:

1. Click the Personal Info tab and the **Personalize Homepage** link to display the Personalize Homepage page.
2. From the drop-down list select the time frame for the information.
3. In each section, select check boxes next to the notices and topics you want to display on your homepage.
4. Click on **Save** button at bottom of page.

The following are links or notices available only to Learning Approvers (**My Team** module):

Quick Link	Takes You To:
Approvals Awaiting Response	Notice appears on My Home tab in My Home
Team Summary	Team Summary tab in My Team
Approve Requests	Approve Request tab in My Team
View Profiles	Profiles tab in My Team
Compare Skills	Compare Skills tab in My Team
Initiatives	Initiatives tab in My Team
Ad hoc Learning	Ad hoc Learning tab in My Team

View Your Team (Direct Reports)

If a Learner is a member of your organization, you have the ability to view information about that the learner. (See Add Direct Reports) This would be helpful for determining their other training commitments before approving learning.

Learning Approvers can view the profiles of each member (subordinates) of their team and carry out actions as described in the table below. The pages are displayed by selecting each item from a drop-down menu next to the team member's name.

You can add subordinates by clicking the Add Direct Reports link in the left navigation bar in the My Team module.

Menu Item	Page Description
Registrations	Allows you to view registrations for a team member and mark them complete.
Transcripts	Allows you to view transcripts for a team member.

Skills	Allows you to view the current skills for a team member. You can also view a skill's history and add a new skill for the member.
Skills Gap	Allows you to view the skills gap for a team member by job type.
Development Plan	Allows you to view the development plan for a team member and to add tasks and learning resources for the member.
Course	Allows you to view, add, or delete courses for a single team member. You can see all your team members' courses by clicking the Courses tab. You can also assign and grant courses on this page. For more information, see "Courses Tab" .
Individual Training Plan	Allows you to view courses for a team member by job type.
Job Profile	Allows you to view job roles for a team member.

Add Direct Reports

If you are assigned as a Learning Approver for Learners in the LMS, you must add them to your list of members in your organizations before you can approve training requests or training information.

A Learning Approver or Unit Training Manager can add direct reports to their My Team page by following these steps:

1. Select My Team from the drop-down and click on the Team Summary Tab.
2. Click on the Add Direct Report link in the left navigation pane.
3. Type the first few letters of the user's first or last name and click Search.
4. Click on the name of the person you would like to add as your direct report.

Once you have added a user as your direct report, you will have access to view information about their account, such as registrations and transcript.
To learn more about this view see the Profile Tab.

Create Reports

The LMS provides pre-defined reports on a wide range of data. You can access data and reports in some or all of the modules found in your drop-down list, with the exception of My Home. Exactly what you will see depends on your role and your security privileges.

Once you select one of the modules in the drop-down, the LMS displays the Reports tab, which lists the available reports for that module. Some reports may be available within multiple modules. For example, “Classroom Instructor Assignments” may appear under

"Lessons," "Instruction," and "Resources" since not everyone has access to all three modules.

Once you have located the desired report, select it. Depending on the contents of the report, the LMS may prompt you to enter more information before the report is generated (e.g., the "Roster" report prompts you for the lesson number). After you enter any additional data, the LMS generates and displays that report. From the report displayed on the screen, you can print out the report, export it as a file to your computer, or search the text.

When you request a report from over the web, you must be careful that you get the correct data. If you attempt to run the same report a second time but with new information (e.g., a new lesson number), your browser may call up the first report from the memory cache on your computer. To avoid this, click the Refresh icon on the Reports viewer. The report data will be refreshed according to your new entries.

Running/Viewing System Reports:

The steps necessary to run or view system reports are:

1. Access the LMS.
2. Choose one of the modules from the drop-down list.

   The system displays the tabs for the module. If the module supports running reports, a **Reports** tab is displayed.

3. Click the **Reports** tab. A list of the system reports that have been assigned to the current module is displayed. If no system reports have been assigned to the current module, the page does not display any reports.
4. Select the name of the report you wish to run.
5. If required, enter parameter information and click Submit. If no parameter fields appear, simply click Submit.

Find User Roles

The LMS allows you to view the roles of other users. To accomplish this,

1. Select People from the Go-to: Drop-down list.
2. Enter the criteria for the specific user and select Go.
3. Select the Edit icon beside the desired user name.
4. Click on the Roles link in the left navigation bar
5. If the user is associated with other roles, those will be listed in the Security Roles tab in the left sidebar. Click on the Security Roles list to find any additional roles associated with the user.

LEARNING MANAGEMENT SYSTEM

CHAPTER 8

SCHEDULER

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Scheduler Functions within the LMS

In this chapter, you will build on the functions that you learned in Chapter 1 and Chapter 2 to obtain a greater understanding of the LMS and the system functions you will use in the role of a Scheduler. Listed below are the modules that are accessible in the LMS for the Scheduler role, together with the Tabs (from the Tab Bar), associated with that module, and the links located in the left navigation bar associated with each Tab. Modules are found by clicking within the **Go- to** drop down box in the upper right quadrant of the LMS screen.

Go-to:	Tab	Left Navigation Bar
My Home This module (the default module for all users) allows you to view your training information including transcript and registrations as well as search the catalog and launch collaboration functions.	My Home	Quick links which may include: Registrations Development Plan Search Training Catalog Find Experts Find Communities Order History Transcript NOTE: Some learners may have more links.
	My Development	Registrations Transcript Skills Skill Gap Development Plan Course Progression Individual Training Plan
	Training Catalog	AKO
	Information Resources	No links – only information available.
	Communities	Communities of Practice Personal Communities Create Communities Q & A People Online Search Box
	Experts	Find Subject Matter Experts Communities in which I am an Expert
	Assessments	Critiques

Go-to:	Tab	Left Navigation Bar
	Personal Info	Main Information Lesson Requests Job Profile Personalize Catalog Personalize Homepage

Lessons This module allows you to create, edit, and delete instructional units.	Lesson	No links – only search and create capability.
	Lesson Template	No links – only search and capability.
	Lesson Requests	No links – only search capability.
	Lesson Batch	No links – only search and create capability.
	Registrations	No links – only search capability.
	Reports	(See list on Main screen)

Catalog This module allows you to create, edit, and delete catalog items, including products, courses, and instructional units.	Curriculum	No links – only search capability.
	Lesson Template	No links – only search and create capability.
	Product	No links – only search and create capability. Get All Items or Get Items for Reorder
	Course Iteration	No links – only search and create capability.
	Roster Template	No links – only search capability.
	Courses	No links – only search capability.
	Library	No links – only search capability.
	Skills	Search Create Skill Create Group
	Reports	(See list on Main screen)

Resources This tab allows you create, edit, and delete resources.	Facility	No links – only search and create capability.
	Equipment	No links – only search and create capability.

Go-to:	Tab	Left Navigation Bar
Management of the resources occurs in the Catalog module.	User	No links – only search capability.
	Location	No links – only search and create capability.
	Building	No links – only search and create capability.
	Batch Resources	No links – only search capability.
	Service Provider	No links – only search and create capability.
	Reports	(See list on Main screen)

Course Management

The Course Management functions include the long-range scheduling of iterations for Army courses. This includes defining the start dates, end dates, and maximum capacity. This function also schedules the fixed time periods for activities that require system resources such as video teleconference (VTC) capabilities and collaboration licenses. For most formal Army courses, these functions are allocated to the Army Training Requirements and Resources System (ATRRS) and are received into the system through the ATRRS interface. Other courses may be scheduled within the LMS functionality.

- View Courses, Products
- Create and Edit Lessons (Events)
- Create Non-Training Events.

View Courses, Products Details

From the Catalog drop-down lists, you have the capability to view the courses and products in the LMS. You would view the details of course and products for a number of reasons, including checking version numbers, lesson schedules, attachments, and other information associated with the course or product. From those views, you have the option to both edit and create new entries.

View Course Detail

To view the details of a course, follow these steps:

1. Select Catalog from the drop-down module list.
2. Select the Courses tab and select the Search option in the left navigation bar.
3. Enter Search Criteria and select Go. This will return the list of courses that match the search criteria.
4. Click the Icon in the Edit column. This will display the course details.

Editing Courses

While viewing the Course Detail, you have the option to add or edit information. Information can be edited on the Main Details Page by selecting an editable field from the drop-down list at the top of the Main Information page. You can add detail by selecting on the desired link in the left navigation bar.

Important Many of the changes made after a course has been made available will affect learners who are currently in progress for the course or have already acquired it. As a result, the LMS strongly recommends versioning any courses for which you make significant changes.

For more information, see "Managing Courses"

View Product Detail

You view the details of products in the **Catalog** module.

To view the product details in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu and click the **Search** link in the left navigation bar.
3. Enter the search criteria and select Go. This will return a list of products that match your search.
4. Click the icon in the Edit column to display the information for the product.

You can edit the product information at this point. There is a list of fields available for modification in the drop-down list above the Main Information page (NOT the module drop-down in the upper right corner of the LMS screen). You may edit information on the page or using the left navigation bar links. Those are listed below:

Page	For More Information, See:
Attachments	See TAB 11: Attachments
Associated Content	See TAB 45: Viewing Content Associated with Products
Skills	See TAB 46: Assigning Skills to a Product
Prerequisites	See TAB 47: Specifying Prerequisites for a Product
Equivalents	See TAB 48: Specifying Equivalents for a Product

Keywords	See TAB 49: Specifying Keywords for a Product
Audit Trail	See TAB 13: Viewing Audit Trails
Courses	See TAB 50: Viewing Courses Associated with Products
Inventory Location	See TAB 51: Assign Inventory Locations to a Shippable Product
Internationalization	Functionality Not Used in System Release.
Notes	See TAB 14: Notes
Price	
Cancellation Charges	

Create and Edit Lessons (Events)

To create a course, you must first create the lesson templates, lesson iterations, and products before creating the course and defining the modules. If you wanted lesson iterations that were not associated with courses, you would only need to create the lesson template and schedule the lesson iterations. After you have created the following items, you will have the ability to edit them. Editing includes modifying the general information about the training item (e.g., name, location, duration) as well as adding attachments, prerequisites, notes, etc. Links to the specific editable fields and additional edit functions (e.g., adding attachments) can be found with the help files for the item.

Attachments

Use attachments to provide additional information, such as overviews, critiques, and abstracts, learning objectives, for the following objects:

- Lesson Templates and Lessons
- Products
- Users
- Manufacturers and vendors
- Inventory items
- Itineraries
- Locations and facilities

In order to add attachments to a product, you must first navigate to that product, either create it or edit it, then the Attachments link in the navigation bar will be available.

To add an attachment:

1. In the left navigation bar, click the Attachments link. The following two sections appear:
    - Attachment List, displaying a list of all attachments in a community.
    - New Attachment, which allows adding new attachments to a community.
2. In the New Attachment section:
    - In the Name text field, enter a name for the attachment.
    - From the Category drop-down list, select a category.
    - From the Language drop-down list, select a language.
    - Select the Private check box if you want to make the attachment unavailable for other learners.
    - Select one of the following check boxes:
        - Enter URL, if your attachment is a Web page.
        - Upload file, if your attachment is a file.
        - Enter a URL for a Web page or path for a file.
3. Click Add to List.

Create and Edit Lesson Templates

Templates and iterations are created by two separate processes. Templates contain all the general details about the learning item; iterations are scheduled instances of the template. Templates must always be created before iterations can be scheduled; however, once the template has been created, there is no limit to the number of iterations that can be scheduled using the template.

Note: A Lesson and an Event are created and maintained by the LMS in the same manner. Throughout this document, whenever you see the word “lesson,” it is synonymous with “event.” Therefore, if you were instructed to create an education/training event or training support event, you would follow the steps for creating a lesson template, then scheduling a lesson iteration.

Lesson Template – The information and details upon which a lesson iteration is scheduled. It contains basic information such as lesson title and duration.

Create Lesson Template

To create a Lesson Template in the LMS

1. Select Catalog in the Go to: drop-down list.
2. Click Lesson Template on the menu and click the Create link in the left navigation bar to display a form to define a new Lesson Template.
3. Enter required information for creating the lesson template:

Required Information	Description
Lesson Group	Use the Finder to select a product group for the lesson template. The product group specifies how the lesson template is grouped in the Training Catalog.
Lesson Template Number	Enter a part number for the lesson template. You must enter an alphanumeric string that uniquely identifies the lesson template. The part number can be used to search for and order the lesson template. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. **Note** If the prefix appears, do ***not*** delete or change the prefix. The system requires product group prefixes to be included in all part numbers.
Title	Enter the title for the lesson template. Lesson template title can be specified as criteria when searching the Training Catalog. In addition, the title of a lesson template is displayed for all lessons scheduled for the lesson template.
Manager Approval	This link allows you to define whether manager approver is required for this lesson. In order to make manager approver required, the field needs to be set to "Yes".
Duration (Hrs)	Enter the length of the lesson template in hours.
Min Count	Enter the minimum number of students required to deliver lessons for the lesson template. This value can always be overridden when scheduling lessons.

Max Count	Enter the maximum number of students that can register for the lessons for the lesson template. This value can always be overridden when scheduling lessons.
Max in Waiting List	Enter the maximum number of students that can be on the waiting list for the lessons for the lesson template. This value can always be overridden when scheduling lessons.
Security Domain	Select a security domain for the product group from the pick list. If no domain is specified, the system automatically assigns the `world' domain. **NOTE:** Only those users who have security privileges within the Security Domain you select will be able to perform their respective operations within this lesson template and subsequent lessons.
Units	If you are tracking your lesson templates by units, enter the number of units to which this lesson template is equal. The default is one.
Language	Use the Finder to select the lesson template language. This language is used as the default for lessons created for the lesson templates. Note: Lesson templates can have more than one language. After the lesson template is saved, a link, Language, is displayed in the left navigation bar. Using this link, you can enter additional languages in which the lesson template is offered.
Available From	From the pick list, select the first date the lesson template will be available.

4. Enter any optional information for the lesson template:

Optional Information	Description
Roster Template	Select a roster template for the lesson template from the pick list. The roster template you select is used to automatically create a list of reserved seats in the lessons created for this lesson template.

	When you create a lesson for a lesson template, you cannot override the roster template, if one exists, for the lesson template. To remove or edit the roster seating created by the roster template, you must manually delete/update the individual reserved seating entries for the lesson once the lesson is created.
Abstract	Enter an abstract, up to 1024 characters long, for the lesson template.
Discontinue From	From the pick list, select the date the lesson template will be not be available.
Display for Call Center	Select this check box to display the lesson template in the Training Catalog for Call Center registrars (LMS Client).
Display for Web	Select this check box to display the lesson template in the Training Catalog for learners, managers, and group administrators, as well as web registrars.
Enable	Select this check box to enable the lesson template.
Internal	Select this check box to designate the lesson template as orderable for employees.
External	Select this check box to designate the lesson template as orderable for clients (external users).

5. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area.

   Enter information in the fields as required/desired.

6. Click Save to save your information and create the lesson template.

Edit Lesson Template

After you have created the lesson template, you may edit the specified attributed or add additional information. To edit:

1. Select Catalog in the Go to: drop-down list.
2. Click the Lesson Template tab and click the Search link in the left navigation bar.
3. Enter the search criteria and press Go.
4. Find the desired lesson template and click the Edit icon.
5. You can edit the information on the main page that is not shaded.
6. You can edit additional information (e.g., attachments, prerequisites) using the left navigation bar links. See the links below for more information about that.

After the system creates the lesson template, links to the following pages are displayed:

Page	For More Information, See:
Curriculum	Link to the curriculum functions.
Resources	TAB 23: Adding Resource Types and Assigning Resources to Lesson Templates
Instructor	TAB 24: Designating Qualified Instructors for a Lesson Template
Attachments	TAB 11: Attachments
Associated Content	TAB 25: Viewing Content Associated with Lesson Template
Expenses	TAB 26: Defining Expenses for a Lesson Template
Prerequisites	TAB 27: Specifying Prerequisites for a Lesson Template
Equivalents	TAB 28: Specifying Equivalents for a Lesson Template
Skills	TAB 29: Assigning Competencies to a Lesson Template
Keywords	TAB 30: Specifying Keywords for a Lesson Template
Checklist	TAB 31: Defining a Checklist for a Lesson Template
Audit Trail	Viewing Audit Trails The audit trail list the modifications made to the LMS item. It lists the user who changed it and the attributes along with the date and time.
Course (for which the course is required; display only)	TAB 32: Course Overview
Internationalization	TAB 37: Multi-Language Objects
Notes	TAB 14: Notes
Language	TAB 38: Specifying Languages for a Lesson Template

Lesson Iteration – Scheduled lesson template; smallest unit in the LMS that can be registered for; is designed to achieve a single function objective. It allows you to schedule lesson iterations at varying locations and for various times, including contiguous and non-contiguous time periods

Schedule Lesson Iterations

Scheduled lessons are created and maintained in the Lessons module in the LMS. Students are registered for scheduled lessons through orders created in the Registrar module (manager) or My Home (learner self-registration). These same steps are used to create all instructional units (except products) with courses.

To schedule a lesson in the LMS:

1. Select Lessons in the Go to: Drop-Down list.
2. Click Lesson on the menu and click the Create link in the left navigation bar to display a form to define a new lesson.
3. Enter the required information needed to define the lesson.

Required Information	Description
Lesson Number	Auto-generated based on Lesson Template.
Lesson Template	Use the Finder to select the appropriate lesson template for the lesson. Lesson Template are created in the Catalog Go-to: module list; for more information see, **Creating a Lesson Template**
Location	Use the Finder to select a location for the lesson. **Note** This field is disabled if the `Location/Facility Relationship' business rule is enabled. When you select a facility for the lesson, the location for the facility is automatically entered in this field.
Building	Use the Finder to select a facility for the lesson. **Note** This field is required only if the `Location/Facility Relationship' business rule is enabled. If the business rule is disabled, this field is optional.
Start Date	Use the Calendar to select a start date for the lesson.
End Date	Auto-generated based on Start Date and Session Template
Session Template	Use the Finder to find and select a session template for the lesson. A session template is the weekly schedule that the lesson iterations are taught. It can be consecutive days and times, or it can non-consecutive days and times. For example, Monday - Friday 0900 to 1700 would be a session template. As would, Monday 1000 to 1200 then Thursday 1300 to 1500. These templates can also be created using the same steps described in the following link while

	scheduling a lesson. There is a link by Session Template field that allows you to create a weekly session template. For more information about Weekly Session Templates, see TAB 44: **Creating a Weekly Session Template**
Lesson Type	Select a lesson type from the drop-down list. This is information only.
Delivery Type	Select a delivery type from the drop-down list. This is information only.
Min Count	Enter the minimum number of students for the lesson.
Max Count	Enter the maximum number of students for the lesson.
Max in Waiting List	Enter the maximum number of students who can be added to the lesson waiting list.
Lesson Basic Price	Auto-generated if there is a basic price.
Max Discount	This field is not being used; enter a "0" if the field is required.
Security Domain	Select a security domain for the lesson from the pick list in the Security Domain field.
Language	Select the lesson language from the drop-down list. Lessons can have more than one language. After the lesson is saved, a link, Language, is displayed on the left. Using this link, you can enter additional languages in which the lesson is offered.

4. Enter any optional information for the lesson:

Optional Information	Description
Virtual Classroom	This field is not being used.
Customer Service Rep	This field is not being used.
Credit Quality	This field is not being used.
Display for call center	Select this check box to display the lesson in the Product Catalog for registrars.

Display for web	Select this check box to display the lesson in the Product Catalog for learners, managers, and group administrators.
Available	Select this check box to make the lesson available for ordering.
Internal	Select this check box to designate the lesson as for users.
External	Functionality not used. Should be left checked.
Custom Fields	Enter information in any custom fields that have been defined.

5. Click Save to save your information and to schedule the lesson.

Edit Lessons

After you have scheduled the lesson, event, or instructional unit, you may edit the specified attributed or add additional information. To edit:

1. Select Lessons in the Go to: drop-down list.
2. Click the Lesson tab and click the Search link in the left navigation bar.
3. Enter the search criteria and press Go.
4. Find the desired lesson and click the Edit icon.
5. You can edit the information on the main page using the drop-down list above the main page information.
6. You can edit additional information (e.g., attachments, prerequisites) using the left navigation bar links. See the links below for more information about that.

Links to the following pages are displayed:

Page	Description
Resources	Click this link to assign resources for the lesson. For more information, see TAB 39: **"Assigning Resources"**
Lesson Site	Use this link to view address details for the site where the lesson is taught.
Attachments	Click this link to add attachments to the lesson. For more information, see TAB 11: **"Attachments"**.
Associated Content	Click this link to view any content associated with the lesson. For more information, see TAB 52: **"Creating and Managing Lessons"**.

Manager Approval	This link allows you to define whether manager approver is required for this lesson. In order to make manager approver required, the field needs to be set to "Yes".
Lesson Sessions	Click this link to see details on lesson sessions.
Roster Seating	Click this link to display a page that allows you to add seats to the lesson. See TAB 56: **Roster Seating**
Audit Trail	Certain actions are recorded in an audit trail that you can view. For more information, see TAB 13: **"Viewing Audit Trails"**.
Section	Click this link to display a page that allows you to add sections to the lesson.
Notes	Click this link to add or view notes for a lesson. For more information, see TAB 14: **"Notes"**.
Roster	Click this link to perform lesson management activities, including viewing the learners in the lesson, recording grades, marking attendance, and crediting unregistered learners

Creating a Weekly Session Template

To create a weekly session template in the LMS:

1. Select Lessons in the Go to**:** drop-down list.
2. Click Session Template on the menu and click the Create link in the left navigation bar to display a form to define a new session template.
3. Select the Weekly radio button to specify the template as a weekly session template.
4. The LMS enables the No. of Weeks field.
5. Enter the required information needed to define the session template.

Required Information	Description
Session Template Name	Enter a name for the template in the Template Name field. Tip Enter a descriptive name so you and other users can easily identify the template. For example, you could use `TTH(6-9)' for lessons that are held Tuesday and Thursday, 6 pm to 9 pm.
No. of Weeks	Enter one for the number of weeks for the session template.

5. Enter the ***required*** information needed to define the session.

Required Information	Description
Name	Enter a name for a session.
Day	Select the day of the week from the drop-down list.
Start Time	Use the Time icon to enter a start time.
End Time	Use the Time icon to enter an end time.

6. Select the check box if this is the first session of the template.
7. Click Add to add the session to the template. The LMS automatically displays the number of weeks you specified for the session template and adds the session to each week
8. To add additional weeks to the session, enter the number of weeks in the "No. of Weeks" field, and click apply.

To add additional sessions to the template, repeat these steps.

To change the information for a session, select the session and change the desired information in the fields, then click Update. The LMS automatically refreshes the display to reflect your changes

Tip To quickly and easily add another session that is similar to the last added session, simply enter a different session name, change the desired information (day of the week or start and end times), then click Add.

Click Save to save your information and to create the template.
After the system creates the item, links to the following page are displayed:

Page	Description
Notes	See TAB 14:Notes

Create and Edit Products

Products are Physical items in the LMS that are part of a course, such as manuals or training aids.

Create Products

This process is used for creating training products in the LMS, such as CD-ROMS, as well as creating inventory.

To create a product (and inventory) in the LMS:

1. Select Catalog in the Go to: drop-down list.
2. Click Product on the menu and click the Create link in the left navigation bar to display the page for creating a new product.
3. Enter the required information for creating the product:

Required Information	Description
Product Group	Select the product group under which the product is classified in the Product Catalog.
Part Number	Enter a part number for the product. You must enter an alphanumeric string that uniquely identifies the product. Part number can be used to search for and order the product. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. **Note** If the prefix appears, do ***not*** delete or change the prefix. The system requires product group prefixes to be included in all part numbers.
Name	Descriptive name of the product.
Category	User-defined category which specifies the product type/media (e.g., WBT, Assessment Test, Video). The category also specifies whether the product is shippable or launchable/downloadable. For more information, see TAB 21: **"Shippable Products"** or See TAB 57: **"Launchable/Downloadable Products"**.
Security Domain	Select a security domain for the product.
Manager Approval	This link allows you to define whether manager approver is required for this lesson. In order to make manager approver required, the field needs to be set to "Yes".
Available From	Select the date the product will be available.

4. Enter any optional information for the product:

Optional	Description

Information

Discontinued From	Select the date after which this product is no longer available.
Available Quantity	(Display only) Displays the total number of units available at all the locations for the product. The field is incremented when you enter quantity numbers for the product in the ***Inventory*** page. The field is decremented when you add the item to an order. **Note** This field only applies to shippable products. For downloadable/launchable product, this field is empty.
Reserved Quantity	(Display only) Displays the total number of units that have been reserved for open orders. The field is incremented when the product is added to an order in an order. The field is decremented when the item in an order is shipped. **Note** This field only applies to shippable products. For downloadable/launchable product, this field is empty.
Training Units	Enter the number of training units to charge for the course. By entering a number in this field, you specify the lesson template as able to accept training units in place of other payment methods in customer orders. **Note** Training units are not affected by price bands or custom pricing.
Abstract	Enter an abstract, up to 1024 characters long, for the product.
Vendor	Select a vendor name for the product.
Manufacturer	Select a manufacturer name for the product.
Version	Enter a value if you want to track versions of the product. For more information, see TAB 60: **"Product Versioning and Expiration"**.
Display for Call Center	Select this check box to display the product in the Training Catalog for Call Center registrars (LMS).

Display for Web	Select this check box to display the product in the Training Catalog for learners, managers, and group administrators, as well as web registrars.
Internal	Select this check box to designate the product as orderable for employees.
External	Select this check box to designate the product as orderable for clients (external users).
Use as Resource	Select this check box to indicate the product can be used as inventory for lesson iterations. To create inventory, you must assign it to a location. See TAB 51: **"Assign Inventory to Locations"**

5. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area. Enter information in the fields as required/desired.
6. Click **Save** to save your information.

Edit Products

After you have created the Product, you may edit the specified attributes or add additional information. To edit the product:

1. Select Catalog in the Go to**:** drop-down list.
2. Click the Product tab and click the Search link in the left navigation bar.
3. Enter the search criteria and press Go.
4. Find the desired product and click the Edit icon.
5. You can edit the information on the main page that is not shaded.
6. You can edit additional information (e.g., attachments, prerequisites) using the left navigation bar links. See the links below for more information about that.

After the system creates the product, links to the following pages are displayed:

Page	For More Information, See:
Attachments	See TAB 11: **Attachments**
Associated Content	See TAB 45: **Viewing Content Associated with Products**
Skills	See TAB 46: **Assigning Skills to a Product**
Prerequisites	See TAB 47: **Specifying Prerequisites for a Product**
Equivalents	See TAB 48: **Specifying Equivalents for a Product**
Keywords	See TAB 49: **Specifying Keywords for a Product**

Audit Trail	See TAB 13: **Viewing Audit Trails**
Courses	See TAB 50: **Viewing Courses Associated with Products**
Inventory Location	See TAB 51: **Assigning Inventory to Locations**
Internationalization	Functionality Not Used in System Release.
Notes	See TAB 14: **Notes**
Price	Click this link to enter the cost of the course.
Cancellation Charges	Click this link to define cancellation charges that occur during periods before or during lessons.

- Module – Collection of lessons and products, designed to meet multiple function objectives.

Create and Edit Modules

Create Module

To create a module, you will have already have had to input some course and phase information. You have to create at least one module in order to create a course template. You are already in the Catalog Go-to: Drop-down, the Courses tab, Edit Course, and the Phases link.

Marking a Module in a Version as Required

You can designate this specific module as required by selecting the required check box.

Specifying Number of Completion Choices

You must indicate the number of choices the learner is required to complete by entering a number in the field. The number of learning offerings in a version must be equal to or greater than the number entered into this field.

To create a module:

1. Click Add New
2. Enter the Name and Available From date as required information; Discontinued from and Acquire with fields are optional.
3. Click Add New
4. Enter the Name and Number of Offerings required to finish module.
5. Click Add New
6. Select the learning offerings you want by using the search tool. Enter category and click Go. Selection of Product Group is optional
7. Select the Product and Click Done.

Edit Module

To edit modules for a specific iteration

Course Iterations

1. Select Catalog in the Go to: drop-down list.
2. Click the Course Iteration tab and click the Search link in the left navigation bar.
3. Enter the search criteria and press Go.
4. Find the desired course iteration and click the Edit icon.
5. Click Course Iteration Lessons link.
6. Click the Edit icon next to the module you want to edit.
7. From here you can delete learning offerings, add more offerings, or change the information about the module.

Course Iteration – Scheduled Course with start and end date

Schedule and Edit Course Iterations

Schedule Course Iterations

Scheduling course iterations includes choosing catalog items, under which the course iteration is being offered, the date it is available, whether it is available for users.

Course iterations can be added in the **Catalog** module. To schedule a course iteration in the LMS:

1. Select Catalog in the Go to: drop-down list.
2. Click the Course Iteration tab and click the Create link in the left navigation bar to display the page for creating a course iteration.
3. Enter the required information for creating the course iteration:

Required Information	Description
Product Group	Use the Finder icon to find and select a product group for the course iteration.
Part Number	Enter a part number for the course iteration. You must enter an alphanumeric string that uniquely identifies the course iteration. Part number can be used to search for and order the course iteration. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. **Note** If the prefix appears, do ***not*** delete or change the

	prefix. The system requires product group prefixes to be included in all part numbers.
Name	Enter a name for the course iteration.
Security Domain	Use the Finder to find and select a security domain.
Available From	Use the Calendar to select the first day the course iteration will be available.

4. Enter any optional information for the course iteration:

Optional Information	Description
Description	Enter a description for the course iteration.
Marketing Campaign	This field is not used in the current version.
Discontinued From	Use the Calendar to select the last day the course iteration will be available.
Number Items	(Display only) This field displays the number of items in the course iteration and is blank until you define items for the course iteration.
Training Units	Enter the number of training units to charge for the course. By entering a number in this field, you specify the lesson template as able to accept training units in place of other payment methods in customer orders.
Internal	Select this check box to designate the course iteration as orderable for employees.
External	Select this check box to designate the course iteration as orderable for clients (external learners).
Display for Web	Select this check box to display the course iteration in the Product Catalog for learners, managers, and group administrators, as well as web registrars.
Display for Call Center	Select this check box to display the course iteration in the Product Catalog for Call Center registrars.

5. If any additional fields have been defined by your system administrator, the fields are displayed in the Custom Fields area.
   Enter information in the fields as required/desired.

6. Click the Course Iteration Items link to define items for the course iteration.
   The Course Iteration Items page appears.

   Note You must define at least one item for a course iteration before you can save the course iteration. In addition, you must specify at least one catalog item as a choice for the course iteration item.

   To add a course iteration item and choices for the item:

   a. Click the Add **New** link.
      The Course Iteration Item Details page appears.
   b. Enter the following information for the course iteration item:

Optional Information	**Description**
Description	Enter a description for the course iteration item.

   c. In the ***Choices*** area, click the **Add New** link to add a choice for the item.
      The Search for Learning Offerings pop-up window appears.
   d. Enter a category and, optionally, a product group and click **GO** to return all catalog items that match your search criteria.

      Note that if you select `Lesson' as your category, the search only returns classes that have a start date within the effective dates (Available From and Discontinued From) for the course iteration.

   e. Select one or more of the catalog items in the list by selecting the check boxes next to their titles, then click **Done** to close the pop-up window and add your selections to the course iteration item.

      You can enter as many choices for the course iteration item as you wish. When the course iteration is ordered, any one of the catalog items in the list of choices for the course iteration item can be selected.

7. If you are done adding course iteration items and choices, click **Save** (this link only appears when at least one course iteration item with one choice has been added to the course iteration)

   However, you should make sure that you do not want to add more items to the course iteration. Once you save (i.e., schedule) the course iteration, a price is calculated for the course iteration based on the number of items in the course iteration and the unit price for each item. This price is then added to the top-level internal and external price lists in the system.

   Important If you wish to add more items, do ***not*** click **Save**. Instead, click the **Back** button to return to the previous page where you can add another course iteration item.

Edit Course Iterations

After you have scheduled the course iteration, you may edit the specified attributed or add additional information. To edit:

1. Select Catalog in the Go to: drop-down list.
2. Click the Course Iteration tab and click the Search link in the left navigation bar.
3. Enter the search criteria and press Go.
4. Find the desired course iteration and click the Edit icon.
5. You can edit the information on the main page if it not shaded.
6. You can edit additional information (e.g., attachments, prerequisites) using the left navigation bar links. See the links below for more information about that.

To add or edit the lessons, products, or instructional units associated with this iteration, click the Course Iteration Lessons link in the upper right corner of the Main page. From that page, you have the ability to delete (click the Trash Can icon), edit (click the Edit icon), or add new items (click the Add New button).

After the system schedules the course iteration, links to the following pages are displayed:

Page	For More Information, See:
Audit Trail	See TAB 13: **Viewing Audit Trails**
Internationalization	Functionality Not Used in System Release.
Notes	**Accessing Notes** **Accessing Notes** **LMS Web** All of the objects in the Catalog, Lessons, Resources, Collaboration, and Setup modules in the LMS support entering and view notes for records created for the object. To access the notes for an object record: 1. Find or create a record for the object. 2. Navigate to the details page for the object. 3. Click the Notes link in the left navigation bar. The *Notes* page appears. By default, no notes are displayed. To view existing notes for the object record, enter search criteria and click Go. To enter new notes, click the Add New link in the page header.

Keywords **Adding Keywords to a Course Iteration**

Adding Keywords to a Course Iteration

Keywords can be used as criteria when searching the catalog for catalog items.

To add keywords to a course iteration in the LMS:

1. Select Catalog in the Go to: drop-down list.
2. Click Package on the menu to display the Search and Create links in the left navigation bar.
3. Click Create to display a form to define a new package.
4. Click Search to find an existing package that you can edit.
5. Click the Keywords link to display the Keywords page.
6. Select a keyword from the drop-down list and click Add to list the keyword at the top of the page.

Attachments See TAB 11: **Attachments**

Roster Lists Learners in the iteration as well as links to their grades and output codes

Create Non-Training Events

Non-Training events are scheduled events not requiring tests or grades. Scheduled parades and graduation ceremonies are examples of non-training events.

In the LMS a non-training event is equivalent to a "lesson," the smallest unit for which one can register. Since lessons are based on a lesson template, the lesson template must exist or be created first.

Create and Edit Lesson Templates

Create Lesson Template

To create a Lesson Template in the LMS:

1. Select Catalog in the Go to: drop-down list.
2. Click Lesson Template on the menu and click the Create link in the left navigation bar to display a form to define a new Lesson Template.
3. Enter required information for creating the lesson template:

Required Information	Description

Product Group	Use the Finder to select a product group for the lesson template. The product group specifies how the lesson template is grouped in the Training Catalog.
Lesson Template Number	Enter a part number for the lesson template. You must enter an alphanumeric string that uniquely identifies the lesson template. The part number can be used to search for and order the lesson template. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. Note: If the prefix appears, do ***not*** delete or change the prefix. The system requires product group prefixes to be included in all part numbers.
Title	Enter the title for the lesson template. Lesson template title can be specified as criteria when searching the Training Catalog. In addition, the title of a lesson template is displayed for all lessons scheduled for the lesson template.
Max Discount	This field is not being used; enter a "0" if the field is required
Duration (Hrs)	Enter the length of the lesson template in hours.
Min Count	Enter the minimum number of students required to deliver lessons for the lesson template. This value can always be overridden when scheduling lessons.
Max Count	Enter the maximum number of students that can register for the lessons for the lesson template. This value can always be overridden when scheduling lessons.
Max in Waiting List	Enter the maximum number of students that can be on the waiting list for the lessons for the lesson template. This value can always be overridden when scheduling lessons.
Units	If you are tracking your lesson templates by units, enter the number of units to which this lesson template is equal. The default is one.
Security Domain	Select a security domain for the product group from the pick list.

If no domain is specified, the system automatically assigns the `world' domain.

NOTE: Only those users who have security privileges within the Security Domain you select will be able to perform their respective operations within this lesson template and subsequent lessons.

Language — Use the Finder to select the lesson template language. This language is used as the default for lessons created for the lesson templates.

Note Lesson templates can have more than one language. After the lesson template is saved, a link, Language, is displayed in the left navigation bar. Using this link, you can enter additional languages in which the lesson template is offered.

Available From — From the pick list, select the first date the lesson template will be available.

4. Enter any optional information for the lesson template:

Optional Information	Description
Roster Template	Select a roster template for the lesson template from the pick list. The roster template you select is used to automatically create a list of reserved seats in the lessons created for this lesson template. When you create a lesson for a lesson template, you cannot override the roster template, if one exists, for the lesson template. To remove or edit the roster seating created by the roster template, you must manually delete/update the individual reserved seating entries for the lesson once the lesson is created.
Abstract	Enter an abstract, up to 1024 characters long, for the lesson template.
Display for Call Center	Select this check box to display the lesson template in the Training Catalog for Call Center registrars (LMS Client).
Display for Web	Select this check box to display the lesson template in the Training Catalog for learners, managers, and group administrators, as well as web registrars.

Enable	Select this check box to enable the lesson template.
Internal	Select this check box to designate the lesson template as orderable for employees.
External	Select this check box to designate the lesson template as orderable for clients (external users).
Discontinued From	Select the date after which this product is no longer available.

5. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area.

   Enter information in the fields as required/desired.

6. Click Save to save your information and create the lesson template.

Edit Lesson Template

After you have created the lesson template, you may edit the specified attributed or add additional information. To edit:

1. Select Catalog in the Go to: drop-down list.
2. Click the Lesson Template tab and click the Search link in the left navigation bar.
3. Enter the search criteria and press Go.
4. Find the desired lesson template and click the Edit icon.
5. You can edit the information on the main page if the field is not shaded.
6. You can edit additional information (e.g., attachments, prerequisites) using the left navigation bar links. See the links below for more information about that.

After the system creates the lesson template, links to the following pages are displayed:

Page	For More Information, See:
Curriculum	Link to the curriculum functions.
Resources	Adding Resource Types and Assigning Resources to Lesson Templates Each lesson template can have one or more resource types assigned to it. These resource types are inherited by default by lessons created for the lesson template. For example, every lesson needs an instructor to deliver the lesson. To help make scheduling of lessons easier, you can specify a resource type of `Employee' to each lesson template you create.

In addition, you may choose to assign a specific resource to a lesson template. For example, for a particular lesson template, you may want to designate a particular person as an instructor for the lesson template. When a lesson is created for the lesson template, this person is automatically scheduled as the instructor for the lesson and, as a result, is unavailable for other lessons at the same time or overlapping times, including other lessons created for the same lesson template. You can always change the instructor for the lesson or add more instructors as `Employee' resources for the lesson.
You can both add a resource type and assign specific resources in one step, or only add a resource type and later edit the lesson template to assign specific resources.

Note Any employee is eligible to be a resource, such as an instructor, but people also can be designated as qualified instructors. For more information, see "Designating Qualified Instructors for a Lesson Template" below.

Instructor

Designating Qualified Instructors for a Lesson Template

All employees designated as resources in the LMS are eligible to teach lessons; however, for each Lesson Template in the LMS, you can designate one or more employees as qualified to teach lessons for the lesson template. In addition, for each employee designated as a qualified instructor for the lesson template, you can enter a number that indicates their priority level for the lesson template.

Designating employees as qualified instructors (for lesson template) does not prevent other employees from being used as instructors. It simply enables lesson administrators, when searching for employees to serve as instructors for a lesson, to limit their search to employees who are qualified to teach the lesson template for the lesson. They can further refine their search using the priority levels for qualified instructors.

Tip When assigning priority levels to qualified instructors, you can use any numbering scheme (e.g. ascending, descending); however, you should assign the priorities consistently to enable more accurate and precise searches.

Employees can be designated as qualified instructors for a lesson template when creating or editing the lesson template in Education Planner or the Catalog module in the LMS.

In addition, when creating/editing an employee in the LMS, you can specify one or more lesson templates that the employee is qualified to teach; however, you cannot specify a priority level for the employee for each lesson template.
To designate qualified instructors for a lesson template in the LMS :

1. Select Catalog in the Go to: drop-down list.
2. Click Lesson Template on the menu to display the Search and Create links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit and click on the edit icon.
4. Click the Instructor link on the navigation bar to display the Instructor page.
5. Under New Instructor, select the finder icon for instructors.
6. Enter search criteria in the Employee Finder and click Find, or simply click Find to list all employees.
7. Click the + symbol next to a name to list it at the top of the page. You can add multiple names.

Note This procedure only designates a person as a qualified instructor for the lesson template; to assign them as a resource that will be inherited by lessons, use the Resources link for the lesson template.

Attachments

Attachments
Use attachments to provide additional information, such as overviews, critiques, and abstracts, learning objectives, for the following objects:

- Lesson Templates and Lessons
- Products
- Users
- Manufacturers and vendors
- Inventory items
- Itineraries
- Locations and facilities.

To add an attachment:

1. Click on the Attachments link in the left navigation bar. This will display all attachments already added.
2. Enter any search criteria.
3. Select the appropriate item to attach.
4. Click Add to List in the lower half of the screen

NOTE: This process is the same for the object listed above. So in order to add an attachments to a product, you must first

navigate to that product, either create it or edit it, then the Attachments link in the navigation bar will be available.

Associated Content

Viewing Content Associated with Lesson Template

The LMS supports the ability to deliver online learning content captured in a variety of formats. Some learning content is provided in formats that enable the LMS to inter-operate with the content and record the results of a learner's performance. This type of content includes standards-based content, such as AICC and SCORM, as well as proprietary content from leading content vendors such as NETg, SkillSoft, and SmartForce. Other types of content that can be delivered by the LMS include any file that uses a standard MIME type, any URL, and packages of files such as an HTML site.

In the LMS, all learning content is imported, stored, and managed in the LMS Content repository. Using the *Content* module, content administrators can publish content to the Training Catalog for access by learners.

Note Catalog administrators working in the *Catalog* module cannot capture learning content or associate learning content with Lesson template.

When publishing content to the Training Catalog, content administrators can publish content to existing lesson templates, lessons, or products, or they can publish to new lesson templates, lessons, or products.

Important Each catalog item can have only one content object associated with it.

For complete information about using the LMS Content repository to capture, manage, and publish learning content, see the online help for the *Content* module or the LMS *Content Administrator Guide*.

To define expenses for a lesson template in the LMS:

Select Catalog in the Go to: drop-down list.

Click Lesson Template on the menu to display the Search and Create links in the left navigation bar.

Create a lesson template or find an existing lesson template that you can edit.

Click the Associated Content link to display the *Associated Content* page. Any content associated with this lesson template will be listed.

Prerequisites

Viewing Prerequisites for a Lesson Template

To view other catalog items as prerequisites for a lesson template in the LMS:

1. Select Catalog in the Go to: drop-down list.
2. Click Lesson Template on the menu to display the

Search and Create links in the left navigation bar.
3. Find an existing lesson template that you can edit.
4. Click the Prerequisites link to display the *Prerequisites* page.
5. Select a category from the drop-down list and click the GO button.
6. Enter search criteria and click the GO button to display a list of catalog items.

Equivalents

Viewing Equivalents for a Lesson Template

To view other catalog items as equivalents for a lesson template in the LMS:

1. Select Catalog in the Go to: drop-down list.
2. Click Lesson Template on the menu to display the Search and Create links in the left navigation bar.
3. Find an existing lesson template that you can edit.
4. Click the Equivalents link to display the *Equivalents* page.
5. Select a group and a category from the drop-down list and click the GO button.
6. Enter search criteria and click the GO button to display a list of catalog items that match your criteria.

Skills

Viewing Skills Assigned to a Lesson Template

Skills assigned to a lesson template are granted to learners who successfully complete a lesson for the lesson template (or if the lesson template is marked complete for the learner). When a skill is assigned to a lesson template, you also specify the proficiency level that will be granted to learners when they complete the lesson template.

To view skills assigned to a lesson template in the LMS:

1. Select Catalog in the Go to: drop-down list
2. Click Lesson Template on the menu.
3. Find an existing lesson template that you can edit.
4. Click the Skills link in the left navigation bar to display the *Skills* page.
5. Select a skill group from the drop-down list.
6. Find a skill using the Finder.

Keywords

Specifying Keywords for a Lesson Template

Keywords can be used as criteria when searching the catalog for catalog items.

To view keywords for a lesson template in the LMS:

1. Select Catalog in the Go to: drop-down list.
2. Click Lesson Template on the menu to display the Search and Create links in the left navigation bar.

3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the Keywords link to display the *Keywords* page.

Checklist

Viewing a Checklist for a Lesson Template

To view a checklist for a lesson template in the LMS:

1. Select Catalog in the Go to: drop-down list.
2. Click Lesson Template on the menu to display the Search and Create links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the Checklist link to display the *Checklist* page.

Audit Trail

Viewing Audit Trails

The audit trail list the modifications made to the LMS item. It lists the user who changed it and the attributes along with the date and time.

Course (for which the course is required; display only)

Course Overview

Courses are completed and certificates are awarded when it has been deemed that the learner has demonstrated mastery in a subject area. Learners complete a course and acquire a certificate by completing one or more learning items, and any prerequisites needed. Completing the last item triggers the completion of the course and acquisition of the certificate. The use of prerequisites allows you to specify that learning items are completed at a particular time as part of the acquisition process.

Courses must be completed by completing items within a specific time period. This ensures that the knowledge is current and fresh in the learner's mind. This acquisition period, in addition to the other time period controls, gives you flexible control over when learners must complete items to stay in compliance. Coupled with the ability to set an expiration date for courses, you can determine their useful life and if a new version is needed.

Courses can be assigned to learners either directly or through the roles associated with them. You can define groups of learning items that a learner must complete to be recognized as holding a credential. For example, an education services operation specializing in the software industry could offer certifications in Database Management, Web Design, and Unix-based Programming. Each of these courses could require a different set of the learning items offered by the organization.

The LMS is designed to support full and constant compliance with course requirements. The system automatically updates changes concerning MOS/Career Fields, roles, courses, and learner profiles that are made by the system, administrators, managers, and learners. In addition, whenever a learner completes a learning item or acquires a course, the system checks all other courses assigned to the learner to see if the completion changes the status. These processes serve the need of learners to be constantly in compliance with all courses required by their MOS/Career Field or roles, or by managerial requirements.

Internationalization

Multi-Language Objects

For some objects, Saba provides the ability to define and store multiple language translations for each user-defined value.

For example, when defining courses, the information you define is initially associated with your default locale. By clicking the internationalization icon at the top of the window (in Saba Client) or the Internationalization link (in Saba Web), you can also enter parallel values for each additional locale defined in the system.

The internationalization icon (in Saba Client) is shown below:

If you do not enter translation values for the additional locales defined in the system, another user can do so later. Or, another user can modify the translation values you entered.

When you view a multi-language object, the system displays the values defined for the language associated with your default locale. If the translation for your locale is not available, the system displays the value in the language in which it was originally defined.

Supported Objects for Internationalization

The table below lists the Saba learning objects that support the ability to store user-defined values in multiple languages:

Object	Attributes Supporting Multiple Languages
Courses	Course Title Description
Product Groups	Name

Curricula	Name Description
Products	Name Description
Resource Inventory Items	Name Description
Resource Categories	Name Description
Certifications	Name Description
Competencies	Name Description
Competency Types	Name Description
Competency Proficiencies	Name Description
Transportation Categories	Name Description

Notes

Notes

Notes can be added to any object in the LMS. The LMS maintains a history of all the notes that have been entered for an object.

In addition, to enable more efficient searches for notes, you can define categories and assign these categories when entering notes. For example, you could define categories such as Phone conversations, Meetings, Demos, E-mails sent, and E-mails received for the notes you enter.

Language

View Languages for a Lesson Template

To view languages for a lesson template in the LMS:

1. Select Catalog in the Go to: drop-down list.
2. Click Lesson Template on the menu to display the Search and Create links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the Language link to display the *Languages* page.
5. Enter a language name in the text box and click Find to display a list of languages, or simply click the Find button to list all available languages.

Note You cannot delete the language that is specified as the default language for the lesson template. To delete the language that is specified as the default, you must first specify another language as the default for the lesson template.

You can schedule events so that it appears in the Training Catalog and students may register for it. Resources may be added to it at any time after the lesson has been created.

Schedule and Edit Lesson Iterations

Schedule Lesson Iterations

Scheduled lessons are created and maintained in the Lessons module in the LMS. Students are registered for scheduled lessons through orders created in the Registrar module (manager) or My Home (learner self-registration). These same steps are used to create all instructional units (except products) with courses.

To schedule a lesson in the LMS:

1. Select Lessons in the Go to: Drop-Down list.
2. Click Lesson on the menu and click the Create link in the left navigation bar to display a form to define a new lesson.
3. Enter the required information needed to define the lesson.

Required Information	Description
Lesson Number	Auto-generated based on Lesson Template.
Lesson Template	Use the Finder to select the appropriate lesson template for the lesson. Lesson Templates are created in the Catalog Go-to: module list.
Location	Use the Finder to select a location for the lesson. Note This field is disabled if the `Location/Facility Relationship' business rule is enabled. When you select a facility for the lesson, the location for the facility is automatically entered in this field.
Building	Use the Finder to select a building for the lesson.
Start Date	Use the Calendar to select a start date for the lesson.
End Date	Auto-generated based on Start Date and Session Template

Session Template	Use the Finder to find and select a session template for the lesson. A session template is the weekly schedule that the lesson iterations are taught. It can be consecutive days and times, or it can non-consecutive days and times. For example, Monday - Friday 0900 to 1700 would be a session template. As would, Monday 1000 to 1200 then Thursday 1300 to 1500. These templates can also be created using the same steps described in the following link while scheduling a lesson. There is a link by Session Template field that allows you to create a weekly session template. For more information about Weekly Session Templates, see Creating a Weekly Session Template below.

Creating a Weekly Session Template

To create a weekly session template in the LMS:

1. Select Lessons in the Go to**:** drop-down list.
2. Click Session Template on the menu and click the Create link in the left navigation bar to display a form to define a new session template.
3. Select the Weekly radio button to specify the template as a weekly session template. The LMS enables the No. of Weeks field.
4. Enter the required information needed to define the session template.

Required Information	Description
Session Template Name	Enter a name for the template in the Template Name field. Tip Enter a descriptive name so you and other users can easily identify the template. For example, you could use `TTH(6-9)' for lessons that are held Tuesday and Thursday, 6 pm to 9 pm.
No. of Weeks	Enter the number of weeks for the session template.

Click the **Create** button to list the session at the bottom of the page.
Enter the ***required*** information needed to define the session.

Required Information	Description
Name	Enter a name for a session.
Day	Select the day of the week from the drop-down list.

Start Time	Use the Time icon to enter a start time.
End Time	Use the Time icon to enter an end time.

Select the check box if this is the first session of the template.
Click Add to add the session to the template. The LMS automatically displays the number of weeks you specified for the session template and adds the session to each week.
To add additional sessions to the template, repeat these steps.
To change the information for a session, select the session and change the desired information in the fields, then click Update. The LMS automatically refreshes the display to reflect your changes

Tip To quickly and easily add another session that is similar to the last added session, simply enter a different session name, change the desired information (day of the week or start and end times), then click Add.

Click Save to save your information and to create the template.
After the system creates the item, links to the following page is displayed:

Page	Description
Notes	Tab 11:

Lesson Type	Select a lesson type from the drop-down list. This is information only.
Delivery Type	Select a delivery type from the drop-down list. This is information only.
Min Count	Enter the minimum number of students for the lesson.
Max Count	Enter the maximum number of students for the lesson.
Max in Waiting List	Enter the maximum number of students who can be added to the lesson waiting list.
Lesson Base Price	Auto generated.
Max Discount	This field is not being used; enter a "0" if the field is required.
Security Domain	Select a security domain for the lesson from the pick list in the Security Domain field.
Language	Select the lesson language from the drop-down list. Lessons can have more than one language. After the lesson is saved, a link, Language, is displayed on the left. Using this link, you

can enter additional languages in which the lesson is offered.

4. Enter any optional information for the lesson:

Optional Information	Description
Virtual Classroom	This field is not being used.
Customer Service Rep	This field is not being used.
Credit Quantity	This field is not being used.
Display for call center	Select this check box to display the lesson in the Product Catalog for registrars.
Display for web	Select this check box to display the lesson in the Product Catalog for learners, managers, and group administrators.
Available	Select this check box to make the lesson available for ordering.
Internal	Select this check box to designate the lesson as for users.
External	Functionality not used. Should be left checked.
<Custom Fields>	Enter information in any custom fields that have been defined.

5. Click **Save** to save your information and to schedule the lesson.

Edit Lessons

After you have scheduled the lesson, event, or instructional unit, you may edit the specified attributed or add additional information. To edit:

1. Select Lessons in the Go to: drop-down list.
2. Click the Lesson tab and click the Search link in the left navigation bar.
3. Enter the search criteria and press Go.
4. Find the desired lesson and click the Edit icon.
5. You can edit the information on the main page except for the shaded fields.
6. You can edit additional information (e.g., attachments, prerequisites) using the left navigation bar links. See the links below for more information about that.

After the system schedules the item, links to the following pages are displayed:

Page	Description
Resources	Click this link to assign resources for the lesson.

To assign a resource to a lesson iteration in the LMS:

1. Select Lessons in the Go to: drop-down list
2. Click Lesson on the menu to display the Search and Create links in the left navigation bar.
3. Create a new iterations or find an existing one.
4. Click Resources in the navigation bar to display the Resources page.
5. Enter a search criteria and click on GO.
6. Click the add icon to display the Add New Resource Type drop down box.
7. Select a resource type from the drop-down list to display the Add a Resource: page.
8. Enter required information:

Required Information	Description
Purpose	Select a purpose using the drop-down list...
Resource Subtype	Select a subtype using the drop-down list.

9. Select the finder tool next to the Name box to find the resource you desire.
10. Enter the search information and select Go to return a list of possible resources. Note: if you are searching for "employees," you can select the check box for "Qualify for Lesson" to return only those Instructors, SMEs, etc who are qualified to association with the lesson.
11. Click "+" next to the resource you want; this will automatically populate additional fields in the Resources page.

To delete the resource simply click the trash can icon in the same row as the resource.

Lesson Site	Use this link to view address details for the site where the lesson is taught.
Attachments	Click this link to add attachments to the lesson.

Use attachments to provide additional information, such as overviews, critiques, and abstracts, learning objectives, for the following objects:

- Lesson Templates and Lessons

- Products
- Users
- Manufacturers and vendors
- Inventory items
- Itineraries
- Locations and facilities
-

To add an attachment:

1. Click on the Attachments link in the left navigation bar. This will display all attachments already added.
2. Enter any search criteria.
3. Select the appropriate item to attach.
4. Click Add New in the lower half of the screen.

NOTE: This process is the same for the object listed above. So in order to add an attachments to a product, you must first navigate to that product, either create it or edit it, then the Attachments link in the navigation bar will be available.

Associated Content

Click this link to view any content associated with the lesson.
Creating and Managing Lessons
The tasks associated with creating and managing lessons include:
See TAB 43: Creating Scheduled Lessons
See TAB 52: View Lesson Detail (Edit Information)
See TAB 53: Adding Scheduled Lessons in Batch Mode
See TAB 54: Cloning a Lesson

Lesson Sessions

Click this link to see details on lesson sessions.

Roster Seating

Click this link to display a page that allows you to add seats to the lesson.

Roster Seating (for Lesson Templates/Lessons)

Roster (i.e., reserved) seating allocates seats in a scheduled lesson for specific sets of users (e.g., specific units or Schools).

To establish your roster for the lesson, follow these steps:

1. Select Lessons from the Go-to: Drop-down list, then select the Lesson tab.
2. Create a lesson (enter all criteria and press save) or search for an existing one using the search criteria (click the Edit button to open the lesson if searching).
3. Select Roster Seating from the left navigation bar.
4. Edit or Delete any existing Roster seating; or Add under the New Roster Seating section.
5. Select the unit finder and find the unit in the unit finder box.

6. Enter the number of seats.
7. After you have specified the unit and quantity of seats to reserve, click on Add. You do not have to specify a unit. If, for example, you only wanted 10 people to register, then simply put 10 in the Number Seats Reserved and.

Delete – click the Trash Can icon.

Audit Trail — Certain actions are recorded in an audit trail that you can view.
Viewing Audit Trails
The audit trail list the modifications made to the LMS item. It lists the user who changed it and the attributes along with the date and time.

Section — Click this link to display a page that allows you to add sections to the lesson.

Notes — Click this link to add or view notes for a lesson Notes.
Notes can be added to any object in the LMS. The LMS maintains a history of all the notes that have been entered for an object.

In addition, to enable more efficient searches for notes, you can define categories and assign these categories when entering notes. For example, you could define categories such as Phone conversations, Meetings, Demos, E-mails sent, and E-mails received for the notes you enter.

Roster — Click this link to view lesson management activities, including viewing the learners in the lesson, grades, and attendance.

Resource and Event Scheduling

The Resource and Event Scheduling functions allow for the short range scheduling (less than one year) of Instructors, classrooms, equipment and materials; production and distribution of schedules; and changing of schedules. Your functions include:

- View Lesson Details (including Schedule)
- Assign Resources
- Designate Qualified Instructors
- View Resource Calendars.

View Lesson Details (including Schedule)

When you need to see if resources have been assigned or to edit the name of the instructor who will be doing the training, you must first view the lesson details.

Assign Resources

Managing courses includes assigning resources. In the LMS, resources are defined as the following:

- Employee – Generally an instructor, either military, civilian, or contractor
- Equipment – Items that are not consumed during a lesson, such as an overhead projector, an engine stand, etc.
- Inventory – Items that are consumed during a lesson, such as pencils and notebooks, ammunition, etc.
- Facility – Location where the lesson will take place.

Resources are assigned to courses by creating templates. All learning items created by using the template inherit the resources defined in the template. While the resources are inherited, they can be modified. You must add resources at the course level or lesson level. The lesson session template usually contains a built-in suite of generic resources. For example, the template may require an Instructor and a classroom. However, the template will not choose the specific Instructor or reserve a facility. You must add these details.

If the resource is available, the LMS schedules that resource to the course or lesson for the times and dates specified. If any of the resources scheduled need to be shipped, then the LMS enters the necessary information for product distribution. Once the resource has been scheduled, the LMS decreases the quantity of inventory and equipment and the availability of Instructors and classrooms. Once you have assigned a resource to a lesson, no other lesson can use it.
If the resource is not available, then the LMS informs you there is a problem. This could be one of several possibilities:

- The resource quantity is exhausted
- The resource has already been allocated to another course
- The resources for this lesson exceed the quantity reserved for the course.

Resources assigned to a lesson template will be inherited by lessons created from that template.

View Resource Calendars

Every resource has a calendar so you know the times the resource will be needed and the locations where it will be deployed. You can view the calendar by month, by workweek (Monday through Friday) or by day. Additionally, if you want to view the schedule for a resource in another time zone, you can change your system time zone to another
Resource Calendars (for Scheduled Resources)

Each facility, location, and equipment item (i.e. resource whose time can be scheduled/reserved) has a calendar that can be used to schedule the times it will be needed and locations where it will be deployed. Within the resource calendars, you can also schedule events. You would want to schedule an event if the resource was going to be unavailable for use or some other necessary allocation of the resource where it would be unavailable for regular scheduling. These are represented as events.

Using the Facility Resource Calendar

To use the facility resource calendar in the LMS:

1. Select Resources in the Go to: drop-down list
2. Click Facility on the menu to display the Search link in the left navigation bar.
3. Enter search criteria in the fields in the left navigation bar and click Search to find an existing facility.
4. Click the Edit icon next to a facility listing.
5. Click Calendar on the left menu to display the calendar.
6. Use the following controls to add or find an event:

View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time Zone	Change the calendar display to show events in different time zones. The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to reflect the new time zone.
Add New Event	Use this functionality to schedule known events for the resource that would make it unavailable for regular scheduling (e.g., maintenance work). Select an event type to display the Event Detail page. The Event type has a Start Date, and the All Day Event also contains an end date.
Show Date	Selecting a date from the pop-up calendar and then clicking **Go** will display that date in the main calendar.

7. Click **Save** when finished if adding or editing an event.

Using the Equipment Resource Calendar

To use the equipment resource calendar in the LMS:

1. Select Resources in the Go to: drop-down list
2. Click Equipment on the menu to display the Search link in the left navigation bar.
3. Enter search criteria in the fields in the left navigation bar and click Search to find an existing equipment resource.
4. Click the Edit icon next to a resource listing.
5. Click Calendar on the left navigation bar to display the calendar.
6. Use the following controls to add or find an event:

View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time Zone	Change the calendar display to show events in different time zones. The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to reflect the new time zone.
Add New Event	Use this functionality to schedule known events for the resource that would make it unavailable for regular scheduling (e.g., maintenance work). Select an event type to display the Event Detail page. The Event type has a Start Date, and the All Day Event also contains an end date.
Show Date	Selecting a date from the pop-up calendar and then clicking Go will display that date in the main calendar.

7. Click Save when finished if adding or editing an event.

Using the Location Resource Calendar

To use the location resource calendar in the LMS:

1. Select Lessons in the Go to: drop-down list
2. Click Lesson on the menu to display the Search link in the left navigation bar.
3. Enter search criteria (include the specific location) in the fields in the left navigation bar and click Search to find all instruction units for an existing location. This will display the list of instructional units scheduled at the specified location.
4. Click on the lesion number.
5. Click Display Calendar View in the upper right corner to display a calendar of units at the location.

Use the following controls to find an event:

View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time Zone	Change the calendar display to show events in different time zones.

The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to reflect the new time zone.

Training Management

The Training Management function includes functions associated with the administration of the LMS. Your functions include:

- Creating Reports

Personalize Your Homepage

After successful login, your Homepage will be displayed. The LMS permits you to customize your Homepage. Customization features range from adding your favorite web links to modifying the windows in your display.

Personalize your Homepage: UTM

Customizing your homepage is done in the My Home module, but there is a link that you can add to your homepage that is only available to managers. For information on all the links available to learners, see "Customize Your Homepage" in the Learner help.
To customize your Homepage as a manager:

1. Click the Personal Info tab and the Personalize this homepage link to display the Personalize Homepage page.
2. From the drop-down list select the time frame for the information.
3. In the Quick Link section, select the check box next to the Ad hoc Learning topic to display it on your homepage. This link will take you to the Ad hoc Learning tab in the Registrar module.

Create Reports

The LMS provides pre-defined reports on a wide range of data. You can access data and reports in some or all of the modules found in your drop-down list, with the exception of My Home. Exactly what you will see depends on your role and your security privileges.

Once you select one of the modules in the drop-down, the LMS displays the Reports tab, which lists the available reports for that module. Some reports may be available within multiple modules. For example, “Classroom Instructor Assignments” may appear under “Lessons,” “Instruction,” and “Resources” since not everyone has access to all three modules.

Once you have located the desired report, select it. Depending on the contents of the report, the LMS may prompt you to enter more information before the report is generated (e.g., the “Roster” report prompts you for the lesson number). After you enter any additional data, the LMS generates and displays that report. From the report displayed on the screen, you can print out the report, export it as a file to your computer, or search the text.

When you request a report from over the web, you must be careful that you get the correct data. If you attempt to run the same report a second time but with new information (e.g., a new lesson number), your browser may call up the first report from the memory cache on your computer. To avoid this, click the Refresh icon on the Reports viewer. The report data will be refreshed according to your new entries.

Running/Viewing System Reports

To run/view a system report in the LMS:

1. Access the LMS.
2. Choose one of the modules from the drop-down list. The system displays the tabs for the module. If the module supports running reports, a Reports tab is displayed.
3. Click the Reports tab. A list of the system reports that have been assigned to the current module is displayed. If no system reports have been assigned to the current module, the page does not display any reports.
4. Select the name of the report you wish to run.
5. If required, enter parameter information and click Submit. If no parameter fields appear, simply click Submit.

Note When running a report over the web, if you attempt to run the same report a second time, your browser might call the report from cache. Click the refresh icon on the reports viewer. The report data is refreshed according to your input.

LEARNING MANAGEMENT SYSTEM

CHAPTER 9

CLASS MANAGER

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Class Manager's Functions within the LMS

In this chapter, you will build on the functions that you learned in Chapter 1 and Chapter 2 to obtain a greater understanding of the LMS and the system functions you will use in the role of a Class Manager. Listed below are the modules that are accessible in the LMS for the Class Manager role, together with the Tabs (from the Tab Bar), associated with that module, and the links located in the left navigation bar associated with each Tab. Modules are found by clicking within the **Go- to** drop down box in the upper right quadrant of the LMS screen.

Go-to:	Tab	Left Navigation Bar
My Home This module (the default module for all users) allows you to view your training information including transcript and registrations as well as search the catalog and launch collaboration functions.	My Home	Registrations Development Plan Search Training Catalog Find Experts Find Communities Order History Transcript
	My Development	Registrations Transcript Skills Skills Gap Development Plan Course Progression Individual Training Plan
	Training Catalog	Full Catalog and Lesson Only search capability.
	Information Resources	AKO link
	Communities	Communities of Practice Personal Communities Q & A People Online Search
	Experts	Find Subject Matter Experts Communities in which I am an Expert Search
	Assessments	Critiques

Go-to:	Tab	Left Navigation Bar
	Personal Info	Main Information Lesson Requests Job Profile Personalize Catalog Personalize Homepage Search
Registrar (Internal) This module allows you to view and manage your unit(s), including registering members of your unit for training.	User	Search
	Unit	Search
	Training Catalog	Full Catalog and Lesson Only search capability.
	Ad Hoc Learning	No links
	Lesson Requests	No links. Select from list of available lesson templates.
	Order History	Search Create Shipment List from ATRRS Create Shipment List from ACCP
	Reports	No links. Select from list of available reports
Catalog This module allows you to create, edit, and delete catalog items, including products, courses, and instructional units.	Curriculum	Create Search
	Lesson Template	Create Search
	Product	Create Search Get All Items Get Items for Reorder
	Course Iteration	Create Search
	Roster Template	Search
	Courses	Create Search
	Library	Search
	Skills	Search Create Skill Create Group
	Reports	No links. Select from list of available reports
Lessons This module allows you to create, edit, and delete instructional units.	Lesson	Create Search
	Session Template	Create Search
	Lesson Requests	Search (by Lesson Template or Learner)
	Lesson Batch	Create Search

Go-to:	Tab	Left Navigation Bar
	Registrations	Search for Lessons
	Reports	No links. Select from list of available reports
Communities This module allows you to create, view, and manage critiques and communities.	Community	Create Search
	Critique	Create Search
	Questionnaire	Create Search
	Q & A	SABA Dialog window. (This is a popup screen)
	Reports	No links. Select from list of available reports
Content This module allows you to add and manage electronic content (e.g., SCORM, AICC).	Content	Search Add Content Create Folder
	Content Server	Search
	Reports	No links. Select from list of available reports
Information This module allows you to add information resources to Learner's homepages. This would primarily be used for adding URL links.	Homepage	No links
	Information Category	Search
	Reports	No links. Select from list of available reports
People This module allows you to view user's information as well as create and view LMS roles and MOSs.	User	Search
	Internal MOS / Career Field	Search
	Internal Role	Search Create
	Reports	No links. Select from list of available reports
Resources This tab allows you create, edit, and delete resources. Management of the resources occurs in the Catalog module.	Facility	Search
	Equipment	Create Search
	User	Search
	Location	Search
	Building	Create Search
	Batch Resources	Search (for Lessons) Assigned Resources Also
	Service Provider	Create Search
	Reports	No links. Select from list of available reports

Course Management

The Course Management functions include the long-range scheduling of iterations for Army courses. This includes defining the start dates, end dates, and maximum capacity. This function also schedules the fixed time periods for activities that require system resources such as video teleconference (VTC) capabilities and collaboration licenses. For most formal Army courses, these functions are allocated to the Army Training Requirements and Resources System (ATRRS) and are received into the system through the ATRRS interface. Other courses may be scheduled within the LMS functionality.

- View Courses, Products
- Create and Edit Lessons (Events)
- Insert New Versions.

View Courses, Products Details

From the Catalog drop-down lists, you have the capability to view the courses and products, among other LMS objects. You would view the details of course and products for a number of reasons, including checking version numbers, lesson schedules, attachments, and other information associated with the course or product. From those views, you have the option to both edit and create new entries.

View Course Detail

To view the details of a course, follow these steps:

1. Select Catalog from the drop-down module list.
2. Select the Courses tab and select the Search link in the Left Navigation Bar.
3. Enter Search Criteria and select Go. This will return the list of courses that match the search criteria.
4. Click the Icon in the Edit column to the left of the course name for which you want the details. This will display the course details in the Course Details screen.

Editing Courses

Editing courses includes the same tasks performed when you first created the course. These tasks can be grouped into structure maintenance tasks and information addition tasks.

While viewing the Course Detail, you have the option to add or edit information. Information can be edited on the Main Details Page by (1) selecting an editable field from the drop-down list at the top of the Main Information page or (2) typing the desired text directly into any *unshaded* box. Note that you can only make changes to the grayed-out boxes by using the Change drop-down box. Also, if the grayed-out field you wish to change is not available in the Change drop-down box, then you (*i.e.,* your role) are barred from making changes to that field. You can add details to the course details by selecting on the desired link in the Left Navigation Bar. Each of these links is covered later in this handbook.

Important Note: Many of the changes made after a course has been made available will affect learners who are currently in progress for the course or have already acquired it. As a result, the LMS strongly recommends versioning any courses for which you make significant changes.

Managing Courses

Managing courses includes the tasks performed after you initially create a course, and they consist of the following:

1. Creating a New Version of a Course (See TAB 66.)
2. Recalculating Course Statuses (See TAB 68.)
3. Forcing Course Expiration (See TAB 69.)
4. Versioning Products in Courses (See TAB 70.)

View Product Detail

You view the details of products in the **Catalog** module.

To view the product details in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Product** tab on the menu and then click the **Search** link in the Left Navigation Bar.
3. Enter the search criteria and select **Go**. This will return a list of products that match your search criterion in the Product Search Results screen

Edit Product Detail

After following the three steps above, click the icon in the Edit column to the left of the Part Number or Name of the product whose details you want to see. The detailed information for that product will display in the Product Details screen; you can make edits to the product that you just selected on this screen. However, note that you cannot edit any of the gray-shaded fields on the page. You may also add to or delete certain informational fields associated with this product by using the Left Navigation Bar links. Those associated fields are listed in the table below:

Page	For More Information, See:
Main	The Product Details page is the Main page.
Attachments	See "Attachments" in the "**Create and Edit Lessons (Events)**" paragraph below.
Associated Content	See TAB 45: Viewing Content Associated with Products

Skills	See TAB 46: Assigning Skills to a Product
Prerequisites	See TAB 47: Specifying Prerequisites for a Product
Equivalents	See TAB 48: Specifying Equivalents for a Product
Keywords	See TAB 49: Specifying Keywords for a Product
Audit Trail	See TAB 13: Viewing Audit Trails
Courses	See TAB 50: Viewing Courses Associated with Products
Internationalization	This function is **not used** in the current system release.
Notes	See TAB 14: Notes
Price	Clicking this link allows you to access both the internal and external price list for this product.
Cancellation Charges	Clicking this link allows you to access both the internal and external cancellation price list for this product.

Create and Edit Lessons (Events)

Before you can create a course and defining the modules, you must first create the lesson templates, lesson iterations, and products. If you wanted lesson iterations that were not associated with courses, you would only need to create the lesson template and schedule the lesson iterations. After you have created the following items, you will have the ability to edit them. Editing includes modifying the general information about the training item (e.g., name, location, duration) as well as adding attachments, prerequisites, notes, etc.

Attachments

Use attachments to provide additional information, such as overviews, critiques, and abstracts, learning objectives, for the following objects:

- Lesson Templates and Lessons
- Products
- Users
- Manufacturers and vendors
- Inventory items
- Itineraries
- Locations and facilities

To add an attachment to a Lesson:

1. Click **Lessons** from the **Go-To** drop-down box.
2. Enter the search criteria in the search text boxes on the Left Navigation Bar or simply click **GO** to return all lessons in the Lesson Search Results window.
3. Find the lesson to which you wish to add the attachment and click its corresponding edit icon in the left column.
4. Click on the Attachments link in the Left Navigation Bar. This will display the Attachment List screen, which shows all attachments already added to this lesson, if any. If no attachments have been made, the "No Results Found" message will appear in the top half of the window, under the "Type" column.
5. To add a new attachment, you must first enter the requested information in the text boxes under the **New Attachment** bar before clicking the yellow "**Add to List"** button. If you leave the boxes empty, the system will prompt you for it and will not let you proceed.
6. Select the appropriate item to attach. You can use the "Browse" button to assist in finding the file you want to attach on your workstation, network drives, or diskettes/CD-ROMs.

NOTE: This process is the same for each of the objects listed above. In order to add an attachment to a product, you must first navigate to that product or create it, edit it, then the Attachments link in the Left Navigation Bar will be available.

Templates and iterations are created by two separate processes. Templates contain all the general details about the learning item; iterations are scheduled instances of the template. Templates must always be created before iterations can be scheduled; however, once the template has been created, there is no limit to the number of iterations that can be scheduled using the template.

Note: A Lesson and an Event are created and maintained by the LMS in the same manner. Throughout this document, whenever you see the word "lesson" it is synonymous with "event." Therefore, if you want to create an education/training event or training support event, you would follow the steps for creating a lesson template and then scheduling a lesson iteration.

A Lesson Template is composed of the information and details upon which a lesson iteration is scheduled. It contains basic information such as lesson title and duration.

Create and Edit Lesson Templates

To create a Lesson Template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Lesson Template** on the menu and click the **Create** link in the Left Navigation Bar to display the Lesson Template Details screen, which you use to define a new Lesson Template.
3. Enter at least the ***required*** information to create the lesson template. You may also enter information in the ***optional*** fields, as well. Both types of information, required and optional, are listed in the table below.

Required Information	Description
Lesson Group	Use the Finder to select a lesson group for the lesson template. The lesson group specifies how the lesson template is grouped in the Training Catalog.
Lesson Template Number	Enter a part number for the lesson template. You must enter an alphanumeric string that uniquely identifies the lesson template. The part number can be used to search for and order the lesson template. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. **Note:** If the prefix appears, do ***not*** delete or change the prefix. The system requires product group prefixes to be included in all part numbers.
Title	Enter the title for the lesson template. Lesson template title can be specified as a search criterion when searching the Training Catalog. In addition, the title of a lesson template is displayed for all lessons scheduled for the lesson template.
Manager Approval	A yes/no value that indicates whether the lessons using this template require a manager's approval for enrollment. **This is not the same as "ATRRS Managed."**
Max Discount (%)	The greatest value, in percent, allowable to discount against the cost of lessons using this template.
Duration (Hrs)	Enter the length of the lesson template in hours.
Min Count	Enter the minimum number of students required to deliver lessons for the lesson template. This value can always be overridden when scheduling lessons.
Max Count	Enter the maximum number of students that can register for the lessons for the lesson template. This value can always be overridden when scheduling lessons.
Max in Wait List	Enter the maximum number of students that can be on the waiting list for the lessons for the lesson template. This value can always be overridden when scheduling lessons.
Units	If you are tracking your lesson templates by units, enter the number of units to which this lesson template is equal. The default is one.
Security Domain	Select a security domain for the product group from the pick list. If no domain is specified, the system automatically assigns the `world' domain. **NOTE**: Only those users who have security privileges within the Security

	Domain you select will be able to perform their respective operations within this lesson template and subsequent lessons.
Language	Use the Finder to select the lesson template language. This language is used as the default for lessons created for the lesson templates. **Note:** Lesson templates can have more than one language. After the lesson template is saved, a link, **Language**, is displayed in the left navigation bar. Using this link, you can enter additional languages in which the lesson template is offered.
Available from	The effective date of this lesson template. From the pick list, select the first date the lesson template will be available.

Enter any ***optional*** information for the lesson template:

Optional Information	Description
Training Units	
Roster Template	Select a roster template for the lesson template from the pick list. The roster template you select is used to automatically create a list of reserved seats in the lessons created for this lesson template. When you create a lesson for a lesson template, you cannot override the roster template, if one exists, for the lesson template. To remove or edit the roster seating created by the roster template, you must manually delete/update the individual reserved seating entries for the lesson once the lesson is created.
Abstract	Enter an abstract, up to 1024 characters long, which briefly describes the lesson template.
Display for Call Center	Select this check box to display the lesson template in the Training Catalog for Call Center registrars (LMS Client).
Display for Web	Select this check box to display the lesson template in the Training Catalog for learners, managers, and group administrators, as well as web registrars.
Enable	Select this check box to enable the lesson template.
Internal	Select this check box to designate the lesson template as orderable for employees.
External	Select this check box to designate the lesson template as orderable for

	clients (external users).
Discontinued from	The effective discontinuance date of this lesson template. From the pick list, select the first date the lesson template will no longer be available.
5. Enter any ***custom*** information for the lesson template:	
Proponent School	The school/agency for this template.
Cancellation Reason Code	The code indicating why the course/class was canceled.
Foreign Disclosure Code	The code indicating whether product can be disclosed to foreign entity.

If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area and enter information in the fields as required or desired.

7 Click **Save** to save your information and create the lesson template.

Edit Lesson Template

After you have created the lesson template, you may edit the specified attributes or add additional information. To edit the template:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Lesson Template** tab and click the **Search** link in the Left Navigation Bar. Clicking the search link produces the Lesson Template Search Results screen.
3. Enter the search criteria to find the template for which you are looking and press **Go** to display the Lesson Template Search Results screen.
4. Find the desired lesson template and click the Edit icon to display the Lesson Template Details screen.
5. While you are not able to edit the fields shaded in gray on this screen, you can edit the rest of the information on the Lesson Template Details screen.
6. You can edit additional information (e.g., attachments, prerequisites) using the links on the Left Navigation Bar. See the tabs for each field below for more information about the fields.

After the system creates the lesson template, the Lesson Template Details screen displays the following links in the Left Navigation Bar:

PAGE	FOR MORE INFORMATION, SEE:

Main	Clicking the **Main** link from another screen enables you to return to the Lesson Template Details screen.
Curriculum	
Resources	TAB 23: Adding Resource Types and Assigning Resources to LESSON Templates
Instructor	TAB 24: Designating Qualified Instructors for a Lesson Template
Attachments	TAB 11: Attachments
Associated Content	TAB 25: Viewing Content Associated with Lesson Template
Prerequisites	TAB 27: Specifying Prerequisites for a Lesson Template
Equivalents	TAB 28: Specifying Equivalents for a Lesson Template
Skills	TAB 29: Assigning Skills to a Lesson Template
Keywords	TAB 30: Specifying Keywords for a Lesson Template
Checklist	TAB 31: Defining a Checklist for a Lesson Template
Audit Trail	TAB 13: Viewing Audit Trails
Courses (for which the course is required; display only)	TAB 32: Course Overview
Internationalization	Multi-Language Objects
Notes	TAB 14: Notes
Language	TAB 38: Specifying Languages for a Lesson Template
Clone	

- Lesson Iteration – Scheduled lesson template; smallest unit in the LMS that can be registered for; designed to achieve a single function objective. Allows you to schedule lesson iterations at varying locations and times, including contiguous and non-contiguous time periods.

Schedule and Edit Lesson Iterations

Schedule Lesson Iterations

Scheduled lessons are created and maintained in the **Lessons** module in the LMS. Students are registered for scheduled lessons through orders created in the **Registrar** module (manager) or

My Home (learner self-registration). These same steps are used to create all instructional units (except products) with courses.

To schedule a lesson in the LMS:

1. Select **Lessons** in the **Go-To:** drop-down menu.
2. Click the **Lesson** menu tab and then click the **Create** link in the Left Navigation Bar to display the Lesson Details screen, which you will use to define a new lesson.
3. Enter the ***required*** information below to define the lesson.

Required Information	Description
Lesson Number	Auto-generated based on Lesson Template. You cannot edit this field.
Lesson Template Number	Unique number for this lesson template
Location	Use the Finder to select a location for the lesson. **Note** This field is disabled if the "Location/Facility Relationship" business rule is enabled. When you select a facility for the lesson, the location for the facility is automatically entered in this field.
Start Date	Use the Calendar to select a start date for the lesson.
End Date	Auto-generated based on Start Date and Session Template. Note that this field is grayed out, so you cannot edit it.
Session Template	Use the Finder to select the appropriate session template for the lesson.
Lesson Type	Select a lesson type from the drop-down list. This is information only.
Delivery Type	Select a delivery type from the drop-down list. This is information only.
Min Count	Enter the minimum number of students for the lesson.
Max Internal Conf.	
Max Count	Enter the maximum number of students for the lesson.
Student Count	Number of students enrolled in lesson
Max in Wait List	Enter the maximum number of students who can be added to the lesson waiting list.
Students Waitlisted	Number of students on wait list

Lesson Base Price	Base price for this lesson
Max Discount	This field is not being used; enter a "0" if the field is required.
Security Domain	Select a security domain for the lesson from the pick list in the Security Domain field.
Language	Select the lesson language from the drop-down list. Lessons can have more than one language. After the lesson is saved, a link, **Language**, is displayed on the left. Using this link, you can enter additional languages in which the lesson is offered.
Session Template	Use the Finder to find and select a session template for the lesson. A session template is the weekly schedule that the lesson iterations is taught. It can be consecutive days and times, or it can non-consecutive days and times. For example, Monday - Friday 0900 to 1700 would be a session template. As would, Monday 1000 to 1200 then Thursday 1300 to 1500. These templates can also be created using the same steps described in the following link while scheduling a lesson. There is a link by Session Template field that allows you to create a weekly session template. For more information about Weekly Session Templates, see Creating a Weekly Session Template

4. Enter any ***optional*** information for the lesson:

Optional Information	Description
Building	Use the Finder to select a building for the lesson. **Note** This field is required only if the `Location/Facility Relationship' business rule is enabled. If the business rule is disabled, this field is optional.
Virtual Classroom	
Customer Service Rep.	
Date Cancelled	This is not an editable field.
OPTIONAL CHECK BOXES	
Display for Call Center	Select this check box to display the lesson in the Product Catalog for registrars.

Display for Web	Select this check box to display the lesson in the Product Catalog for learners, managers, and group administrators.
Internal	Select this check box to designate the lesson as for users.
External	Functionality not used. Should be left checked.
Available	Select this check box to make the lesson available for ordering.
<Custom Fields>	Enter information in any custom fields that have been defined. Currently the only custom field is **ATRRS ID**.

5. Click **Save** to save your information and to schedule the lesson.

Edit Lessons

After you have scheduled the lesson, event, or instructional unit, you may edit the specified attributes or add additional information. To edit them, perform the following steps:

1. Select **Lessons** in the **Go to:** drop-down list.
2. Click the **Lesson tab** and click the **Search** link in the Left Navigation Bar.
3. Enter the search criteria and press Go.
4. Find the desired lesson and click the Edit icon to display the Lesson Details page.
5. You can edit any information on the Lesson Details page that is not shaded by clicking in the field and making your change.
6. You can edit additional information (e.g., attachments, prerequisites) using the Left Navigation Bar links. See the links below for more information about that.
7. Be sure to click the **SAVE** link on the upper- and lower-right side of the screen to make the changes in the database. Otherwise, your changes will not take effect.

After the system schedules the item, links to the following pages are displayed:

Page	Description
Resources	Click this link to assign resources for the lesson. For more information, see TAB 39: "Assigning Resources"
Lesson Site	Use this link to view address details for the site where the lesson is taught.
Budgeted Expenses	Click this link to record budgeted expenses for the lesson. For more information, see TAB 40: "Recording Budgeted Expenses".
Actual Expenses	Click this link to record actual expenses for the lesson. For more information, see TAB 41: "Recording Actual Expenses".

Attachments	Click this link to add attachments to the lesson. For more information, see TAB 11: "Attachments".
Associated Content	Click this link to view any content associated with the lesson. For more information, see TAB: 42: "Creating and Managing Lessons".
Manager Approval	This link allows you to define whether manager approver is required for this lesson. In order to make manager approver required, the Amount field needs to be set to "1".
Lesson Sessions	Click this link to see details on lesson sessions.
Roster Seating	Click this link to display a page that allows you to add seats to the lesson. See TAB 56: Roster Seating
Audit Trail	Certain actions are recorded in an audit trail that you can view. For more information, see TAB 13: "Viewing Audit Trails".
Section	Click this link to display a page that allows you to add sections to the lesson.
Notes	Click this link to add or view notes for a lesson. For more information, see TAB 14: "Notes".
Roster	Click this link to perform lesson management activities, including viewing the learners in the lesson, recording grades, marking attendance, and crediting unregistered learners.

Creating a Weekly Session Template

To create a weekly session template in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list.
2. Click **Session Template** on the menu and click the **Create** link in the Left Navigation Bar to display the Weekly Session Template screen that is used to define a new session template.
3. Select the **Weekly** radio button to specify the template as a weekly session template. The LMS enables the No. of Weeks field.
4. Enter the ***required*** information below to define the session template.

Required Information	Description

Session Template Name	Enter a name for the template in the Template Name field. **Tip:** Enter a descriptive name so you and other users can easily identify the template. For example, you could use `TTH(6-9)' for lessons that are held Tuesday and Thursday, 6 pm to 9 pm.
No. of Weeks	Enter the number of weeks for the session template.

5. Click the **Create** button to list the session at the bottom of the page.
6. Enter the ***required*** information needed to define the session.

Required Information	Description
Name	Enter a name for a session.
Day	Select the day of the week from the drop-down list.
Start Time	Use the Time icon to enter a start time.
End Time	Use the Time icon to enter an end time.

7. Select the check box if this is the first session of the template. Click **Add** to add the session to the template. The LMS automatically displays the number of weeks you specified for the session template and adds the session to each week.

To add additional sessions to the template, repeat this process.

To change the information for a session, select the session and change the desired information in the fields, then click **Update**. The LMS automatically refreshes the display to reflect your changes

Tip To quickly and easily add another session that is similar to the last added session, simply enter a different session name, change the desired information (day of the week or start and end times), then click **Add**.

8. Click **Save** to save your information and to create the template.

Create and Edit Products

Create Products

This process is used for creating training products in the LMS, such as CD-ROMS, as well as creating inventory.

To create products (and inventory) in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.

2. Click **Product** on the menu and click the **Create** link in the Left Navigation Bar to display the page for creating a new product.
3. Enter the ***required*** information for creating the product:

Required Information	Description
Product Group	Select the product group under which the product is classified in the Product Catalog.
Product Number	Enter a number for the product. You must enter an alphanumeric string that uniquely identifies the product. Product number can be used to search for and order the product. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the product number. **Note:** If the prefix appears, do ***not*** delete or change the prefix. The system requires product group prefixes to be included in all part numbers.
Name	Descriptive name of the product.
Security Domain	Select a security domain for the product.
Category	User-defined category which specifies the product type/media (e.g. WBT, Assessment Test, Video). The category also specifies whether the product is shippable or launchable/downloadable. For more information, see TAB 21: "Shippable Products" or TAB 57: "Launchable/Downloadable Products".
Available From	Select the date the product will be available.

4. Enter any ***optional*** information for the product:

Optional Information	Description
Discontinued From	Select the date after which this product is no longer available.
Available Quantity	(Display only) Displays the total number of units available at all the locations for the product. The field is incremented when you enter quantity numbers for

	the product in the ***Inventory*** page. The field is decremented when you add the item to an order. **Note:** This field only applies to shippable products. For downloadable/launchable product, this field is empty.
Reserved Quantity	(Display only) Displays the total number of units that have been reserved for open orders. The field is incremented when the product is added to an order in an order. The field is decremented when the item in an order is shipped. **Note** This field only applies to shippable products. For downloadable/launchable product, this field is empty.
Training Units	Enter the number of training units to charge for the course. By entering a number in this field, you specify the lesson template as able to accept training units in place of other payment methods in customer orders. **Note:** Training units are not affected by price bands or custom pricing.
Abstract	Enter an abstract, up to 1024 characters long, for the product.
Vendor	Select a vendor name for the product.
Manufacturer	Select a manufacturer name for the product.
Version	Enter a value if you want to track versions of the product. For more information, see TAB 60: "Product Versioning and Expiration".
Display for Call Center	Select this check box to display the product in the Training Catalog for Call Center registrars (LMS).
Display for Web	Select this check box to display the product in the Training Catalog for learners, managers, and group administrators, as well as web registrars.
Internal	Select this check box to designate the product as orderable for employees.
External	Select this check box to designate the product as orderable for clients (external users).
Use as Resource	Select this check box to indicate the product can be used as inventory for lesson iterations. To create inventory, you must assign it to a location. See TAB 51: "Assign Inventory to Locations"
Remote Flag	

5. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area.

   Enter information in the fields as required/desired.

6. Click **Save** to save your information.

Edit Products

After you have created the Product, you may edit the specified attributes or add additional information. To edit the product:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Product tab** and click the **Search** link in the Left Navigation Bar.
3. Enter the search criteria and press Go.
4. Find the desired product and click the Edit icon.
5. You can edit the information on the main page using the drop-down list above the main page information.
6. You can edit additional information (e.g., attachments, prerequisites) using the Left Navigation Bar links. See the links below for more information about that.

After the system creates the product, links to the following pages are displayed:

Page	For More Information, See:
Attachments	TAB 11: Attachments
Associated Content	TAB 45: Viewing Content Associated with Products
Skills	TAB 46: Assigning Skills to a Product
Prerequisites	TAB 47: Specifying Prerequisites for a Product
Equivalents	TAB 48: Specifying Equivalents for a Product
Keywords	TAB 49: Specifying Keywords for a Product
Audit Trail	TAB 13: Viewing Audit Trails
Courses	TAB 50: Viewing Courses Associated with Products
Inventory Location	TAB 51: Assigning Inventory to Locations
Internationalization	Functionality Not Used in System Release.
Notes	TAB 14: Notes

- Module – Collection of lessons and products, designed to meet multiple function objectives.

Create and Edit Modules

Create Module

To create a module, you will have already have had to input some course and phase information. You have to create at least one module in order to create a course template. You are already in the Catalog Go-to: Drop-down, the Courses tab, and the Phases link.

To create a module:

1. Click **Add New**
2. Enter the **Name** and **Available From** date as required information; **Discontinued from** and **Acquire with** fields are optional.
3. Click **Add New**
4. Enter the **Name** and **Number of Offerings** required to finish module.
5. Click **Add New**
6. Select the learning offerings you want by using the search tool.
7. Click **Save**.

Marking a Module in a Version as Required

You can designate this specific module as required by selecting the **Required** check box.

Specifying Number of Completion Choices

You must indicate the number of choices the learner is required to complete by entering a number in the field. The number of learning offerings in a version must be equal to or greater than the number entered into this field.

Edit Module

There are two ways to edit modules, (1) from the courses tab, (2) from the course iterations tab. You would choose the later to modify modules for a specific iteration, and the former so to affect all future iterations.

1. Editing Modules Using Courses Tab

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Courses tab** and click the **Search** link in the Left Navigation Bar.
3. Enter the search criteria and press Go.
4. Find the desired course and click the Edit icon.
5. Click the Course Version link.
6. Click the Edit icon of the version which contains the module you want to edit.
7. Click the Edit icon of the module you want to edit.
8. From here you can delete learning offerings, add more offerings, or change the information about the module.

2. Editing Modules Using Course Iterations Tab

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Course Iteration tab** and click the **Search** link in the Left Navigation Bar.
3. Enter the search criteria and press Go.
4. Find the desired course iteration and click the Edit icon.
5. Click Course Iteration Lessons link.
6. Click the Edit icon next to the module you want to edit.
7. From here you can delete learning offerings, add more offerings, or change the information about the module.

Insert New Versions

An Army course is a group of catalog items (products, modules, lessons) that the Learner completes to achieve a learning objective. A new version of a product is created automatically whenever it is changed.

Course and Product Catalog (Training Catalog)

The Catalog functions allow you to search available learning offerings (courses, phases, modules, lessons) and products on a variety of criteria, including name, Military Occupational Specialty (MOS), skill level, and location. It provides descriptions, availability and schedule information, as well as automated links to Registration. This includes training shortfalls and knowledge gaps based on requirements and the Learner's training history.

Your functions, which are performed in the **My Home** selection in the **GO-TO:** menu, include:

- Search Training Catalog
- View Product Details
- View Lesson Details
- View Course Details

Personalize Training Search

Registration

The Registration functions allow registration for a course or individual product. They also provide the approval process and perform eligibility and prerequisite checks. If maximum registration limits are exceeded, waitlists are established and managed. Your functions, which are performed in the **Lessons** selection of the **GO-TO:** menu, include:

- Cancel Learner Registration
- Add Learners to Waitlist
- Remove Learners from Waitlist
- Change Waitlist Priority
- Substitute Learners

Cancel Learner Registration

As a Class Manager, you might need to cancel of registrations of some or all of the learners with reservations in lessons within the courses you manage. This might be performed for a number of reasons. If the learner was unable to make the lesson, you might want to cancel their registration to make it available for others, or if all the learners need to be removed for other reasons.

Canceling a registration removes the seat reservation in the lesson as well as the corresponding order line for the registration.

To cancel a registration:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click **Roster** in the Left Navigation Bar link
6. Click the **Cancel** action icon next to a listed item. A pop-up warning reminds you that this action cannot be reversed.
7. Click **OK** to continue. The cancelled registration is removed from the ***Roster*** page.

Note: Registrations also can be cancelled for an entire course iteration. See TAB 71: "Canceling Registrations for Course Iteration."

Add Learners to Waitlist

If the item requested by a Learner is not available, the LMS adds the Learner to a waitlist with an assigned priority. The LMS provides the capability to move registered Learners to the waitlist of the lesson for which they are registered. You would want to move a registered Learner to the waitlist if you needed to make room another Learner or if you wanted to leave confirmed registrations open for mission-critical or higher priority Learners. You can only perform this action for lessons for which you have access (e.g., you can only move Learners in lessons you are scheduled to teach or manager).

As a method of making seats available in a lesson, you may choose to move confirmed registrations to the waitlist.

Once you move a confirmed registration to the waitlist, the seat reserved for the registration becomes available. In addition, seats become available in a lesson when registrations for the lesson are cancelled or the lesson administrator adds seats to the lesson.

To move a registration to the waitlist:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** Left Navigation Bar link

6. Click the **Waitlist** icon next to a listed item.
7. In the ***Waitlist*** pop-up window, enter a reason for the change.
8. Click the **Save** button. The **Waitlist** icon is replaced by the **Confirm** and **Waitlist Priority** icons in the **Action** column.

Note: Registrations also can be moved to the waitlist in the ***Registrations*** page in the **Lessons** module.

Remove Learners from Waitlist

If an item requested by a Learner is not available, the LMS adds the Learner to a waitlist. If there is an open registration, you may move the Learner from the waitlist to that open seat.

When a seat becomes available in a lesson, you can choose to confirm any waitlisted registration for the lesson. Confirming a waitlisted registration moves it from the waitlist to the available seat and changes the status of the registration from **Open - Waitlisted** to **Open - Normal**.

You can choose a waitlisted registration based on order (i.e. first waitlisted registration is assigned to first available seat) or priority.

To confirm a waitlisted registration:

1. Click the **Confirm** icon next to a listed item.
2. In the ***Confirm*** pop-up window, enter a reason for the change.
3. Click the **Save** button. The **Confirm** and **Waitlist Priority** icons are replaced by the **Waitlist** icon in the **Action** column.

Note: Registrations also can be confirmed in the ***Registrations*** page in the **Lessons** module. You may cancel the registration request of the Learner, which moves him/her off the roster.

Change Waitlist Priority

If the item requested by a Learner is not available, the LMS adds the Learner to a waitlist with an assigned priority. This priority can be based on a pre-defined number or on a first-come, first-served basis. The LMS does not automatically move Learners from the waitlist to a vacant seat. Therefore, you have the option of adding Learners. If and when seats become available, you have the option to move or re-prioritize waitlisted reservations. You can also substitute confirmed registrations for waitlisted Learners, or cancel registrations.

When a registration is waitlisted, the system automatically assigns a priority of zero (0). You can assign a different value to any waitlisted registration to indicate that the registration has a higher or lower priority.

Priority information is for reference only. Lesson administrators can use priority when deciding which waitlisted registrations to confirm as seats become available in the lesson.

Note: Priority values are arbitrary; the LMS does not place any restrictions on the priority values you use. You can use any range of values; however, the range should reflect your business practices (e.g. 0 is the highest priority and 99 is the lowest, or vice-versa).

To set a waitlist priority:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** Left Navigation Bar link
6. Click the **Set Waitlist Priority** icon next to a listed item.
7. In the ***Set Waitlist Priority*** pop-up window, enter a priority value and a reason for the change.
8. Click the **Save** button. The new priority value will be listed in the **Waitlist Priority** column.

Note: A waitlist priority also can be set in the ***Registrations*** page in the **Lessons** module.

Substitute Learners

The LMS allows you to substitute unregistered Learners for registered ones. Performing this action bypasses any manager approval required for the lesson. This would be used if a waitlist had reached its capacity, so no other Learners could request registrations. In such a case, a Learner could simply be substituted without have to be first put on a waitlist, and then granted an open seat. If a different learner than the person registered attends a lesson, the registration can be switched from the original person to the new person.

To substitute a registration:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** Left Navigation Bar link
6. Click the **Substitute Learner** icon next to a listed item.
7. In the ***Substitute Learner*** pop-up window, select a different learner from the organization that was billed for this order.
8. Click the **Save** button. A confirmation window will appear. Click **Close** to dismiss the window. The substituted learner's name will appear in the **Student Name** column.

Note: Registrations also can be substituted in the ***Registrations*** page in the **Registrar** module.

Resource and Event Scheduling

The Resource and Event Scheduling functions allow for the short range scheduling (less than one year) of Instructors, classrooms, equipment and materials; production and distribution of schedules; and changing of schedules. Your functions include:

- View Lesson Details (including Schedule)
- Assign Resources
- Designate Qualified Instructors
- Assign Class Managers and Subject Matter Experts
- Assign Learners to Groups, Sub-Groups, and Sections

Viewing Resource Calendars

View Lesson Details (including Schedule)

When you need to see if resources have been assigned to lessons or other learning events or to edit the names or types of resources already associated with the item, you must first view the lesson details.

View Resource Calendars

Every resource has a calendar so you know the times the resource will be needed and the locations where it will be deployed. You can view the calendar by month, by workweek (Monday through Friday) or by day. Additionally, if you want to view the schedule for a resource in another time zone, you can change your system time zone to another.

Resource Calendars (for Scheduled Resources)

Each facility, location, and equipment item (i.e. resource whose time can be scheduled/reserved) has a calendar that can be used to schedule the times it will be needed and locations where it will be deployed. Within the resource calendars, you can also schedule events. You would want to schedule an event if the resource was going to be unavailable for use or some other necessary allocation of the resource where it would be unavailable for regular scheduling. These are represented as events.

Facility Resource Calendar

To use the facility resource calendar in the LMS:

1. Select **Resources** in the **Go to**: drop-down list
2. Click the **Facility** tab on the menu to display the **Search** link in the left navigation bar.
3. Enter search criteria, if any, in the fields on the left Left Navigation Bar and click **GO** to show any existing facilities.
4. Click the **Edit** icon next to the facility listing in which you are interested.
5. Click **Calendar** on the Left Navigation Bar to display the calendar.
6. Use the following controls to add or find an event:

View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time Zone	Change the calendar display to show events in different time zones. The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to reflect the new time zone.
Add New Event	Use this functionality to schedule known events for the resource that would make it unavailable for regular scheduling (e.g., maintenance work). Select an event type to display the Event Detail page. The Event type has a Start Date, and the All Day Event also contains an end date.
Show Date	Selecting a date from the pop-up calendar and then clicking **Go** will display that date in the main calendar.

7. Click **Save** when finished if adding or editing an event.

Equipment Resource Calendar

To use the equipment resource calendar in the LMS:

1. Select **Resources** in the **Go to:** drop-down list
2. Click **Equipment** on the menu to display the **Search** link in the Left Navigation Bar.
3. Enter search criteria, if any, in the fields in the Left Navigation Bar and click **GO** to find an existing equipment resource.
4. Click the Edit icon next to a resource listing.
5. Click **Calendar** on the left menu to display the calendar.
6. Use the following controls to add or find an event:

View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time zone	Change the calendar display to show events in different time zones. The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to reflect the new time zone.
Add New Event	Use this functionality to schedule known events for the resource that would make it unavailable for regular scheduling (e.g., maintenance work). Select an event type to display the Event Detail page. The Event type has a Start Date,

	and the All Day Event also contains an end date.
Show Date	Selecting a date from the pop-up calendar and then clicking **Go** will display that date in the main calendar.

7. Click **Save** when finished if adding or editing an event.

Location Resource Calendar

To use the location resource calendar in the LMS:

1. Select **Lessons** in the **GO-TO:** drop-down menu list
2. Click the **Lesson** tab on the menu to display the **Search** link in the left navigation bar.
3. Enter search criteria (include the specific location) in the fields in the Left Navigation Bar and click **GO** to find all instruction units for an existing location, limited by your search criteria—if you used any.
4. This will display the list of instructional units scheduled at the requested location in the Lesson Search Results window.
5. Click **Display Calendar View** link in the upper-right corner to display a calendar of units at the location.
6. Use the following fields to add or to find an event:

View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time zone	Change the calendar display to show events in different time zones. The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to reflect the new time zone.
Add New Event	Use this functionality to schedule known events for the resource that would make it unavailable for regular scheduling (e.g., maintenance work). Select an event type to display the Event Detail page. The Event type has a Start Date, and the All Day Event also contains an end date.
Show Date	Selecting a date from the pop-up calendar and then clicking **Go** will display that date in the main calendar.

7. Click **Save** when finished if adding or editing an event.

Assign Resources

Managing courses includes assigning resources. In the LMS, resources are defined as the following:

- Employee – Generally an instructor, either military, civilian, or contractor
- Equipment – Items that are not consumed during a lesson, such as an overhead projector, an engine stand, etc.
- Inventory – Items that are consumed during a lesson, such as pencils and notebooks, ammunition, etc.
- Facility – Location where the lesson will take place.

Resources are assigned to courses by creating templates. All learning items created by using the template inherit the resources defined in the template. While the resources are inherited, they can be modified. You must add resources at the course level or lesson level. The lesson session template usually contains a built-in suite of generic resources. For example, the template may require an Instructor and a classroom. However, the template will not choose the specific Instructor or reserve a facility. You must add these details.

If the resource is available, the LMS schedules that resource to the course or lesson for the times and dates specified. If any of the resources scheduled need to be shipped, then the LMS enters the necessary information for product distribution. Once the resource has been scheduled, the LMS decreases the quantity of inventory and equipment and the availability of Instructors and classrooms. Once you have assigned a resource to a lesson, no other lesson can use it.

If the resource is not available, then the LMS informs you there is a problem. This could be one of several possibilities:

- The resource quantity is exhausted
- The resource has already been allocated to another course
- The resources for this lesson exceed the quantity reserved for the course.

Resources assigned to a lesson template will be inherited by lessons created from that template.

Assign Resources to Lesson Templates

Resources can be assigned at two levels: lesson template and lesson iteration.

To assign a resource type for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list
2. Click **Lesson Template** on the menu.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the edit icon that corresponds to the course.
5. Click **Resources** in the Left Navigation Bar to display the ***Resources*** page.
6. Select a resource type from the Add New Resource Type drop-down list.
7. Input the purpose and choose a Resource Subtype.
8. Select a name using the Finder. The remaining fields will be populated by information linked to the specific resource selected.

9. Click **Save** to assign the resource.

This resource will be inherited by all the lesson iterations scheduled based on this template.

Assign Resources to Lesson Iterations

To assign a resource to a lesson iteration in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list
2. Click **Lesson** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create a new iterations or find an existing one.
4. Click the edit icon that corresponds to the course.
5. Click **Resources** in the Left Navigation Bar to display the ***Resources*** page.
6. Select a resource type from the Add New Resource Type drop-down list.
7. Enter required information:

Required Information	Description
Purpose	Select a purpose using the drop-down list.
Resource Subtype	Select a subtype using the drop-down list.

8. Select the picker tool next to the **Name** box to find the resource you desire.
9. Enter the search information and select Go to return a list of possible resources.

Note: if you are searching for "employees," you can select the check box for "Qualify for Lesson" to return only those Instructors, SMEs, etc who are qualified to association with the lesson.

10. Click "+" next to the resource you want; this will automatically populate additional fields in the Resources page.

To delete the resource simply click the trash can icon to the right, in the same row as the resource.

Designate Qualified Instructors

Any user in the LMS who has been designated as a resource is eligible to teach lessons. However, you will want to designate certain users as "qualified instructors" for lessons in specific courses.

Designating a User as a Qualified Instructor

All users designated as resources in the LMS are eligible to teach lessons; however, you can designate a user as "qualified" to teach lessons for specific courses.

Designating users as qualified instructors (for courses) enables class administrators, when searching for users to serve as instructors for a lesson, to limit their search to users who are qualified instructors for the course.

To designate a user as a qualified instructor for one or more lessons using either the ***People*** or ***Resources*** module in the LMS:

1. Select **Resources** from the **GO-TO** drop-down box.
2. Click the **User** tab.
3. Enter the search criteria, if any, to find specific users and click **GO** button.
4. On the Search Results screen, click the **Edit** icon on the user record you wish to access. The ***User Details*** page appears.
5. Click the **Instructor Qualifications** link in the Left Navigation Bar to display the ***Instructor Qualifications*** page.
6. Use the search fields at the bottom of the page to find the lesson template. Click **Find** to display the ***Instructor Qualifications*** page for the user you accessed in Step 4.
7. In the search results, click the + icon next to the name of the lesson template to add that to the list the user is qualified to teach.

Note: Each lesson iteration created using the lesson template will inherit the ability to assign the instructor as a qualified one.

Assign Learners to Groups, Sub-Groups, and Sections

When Learners register for a course iteration, the LMS allows the Manager of the course iteration to assign Learners to groups within that course iteration. Learners can register for course iterations, but do not necessarily have to register for each item in the iteration. This functionality allows the iteration manager to group learners and manage the lessons that they complete (including start dates and locations).

Assigning Learners

After you have created sections, an icon will appear next to that section that will allow you to assign learners to that section. When you select the icon, the LMS will display a page listing all of the registered, unassigned learners in the left column and the learners assigned to the section in the right. Selecting the radio button next to the learners in either column will move them to the other. For example, if John Doe is a registered learner who is not assigned to the section you have chosen to detail, he will appear in the left column, title "Unassigned Learners." If you wish to assigned him to that section, simply select the radio button next to his name and the LMS will dynamically move him into that group.

Assigning Learners to Groups

The LMS allows managers of the course iterations to assign learners to groups within course iterations. The hierarchy is as follows: groups, sub-groups, and sections. Learners are assigned at the section level, and there can be multiple sections within a subgroup. Furthermore, sections

can be assigned to specific lessons within the course iterations. Learners can register for course iterations, but do not necessarily have to register for each item in the iteration. This functionality gives the iteration manager the ability to group learners and manage the lessons (including start dates and locations) that they complete.

Creating Hierarchy

The follow steps create the group hierarchy:

1. Select the **Catalog** module from the **GO-TO** drop-down menu.
2. Enter Search criteria to find the desired course iteration, and select "View Groups" link. This will display the course iteration groups, sub-groups, and sections already created. By default, the LMS creates a default groups, sub-group, and section where all learners are grouped until moved.
3. Click **Add/Modify Groups** to create a new group, sub-group, or sections. If you wish to add a sub-group or section to an existing group or subgroup, you also click this link. The LMS will allow you to select the appropriate radio button for adding a new group, subgroup, or section.
4. Once you have created a section, an icon will appear next to the section. Click this icon to add learners to that section.

Assigning Lessons to Sections

Before you can assign sections of learners to lessons, you must have already created groups, sub-groups, and sections. Follow this path to assign lessons within the course iteration to sections of learners:

1. Select the **Catalog** module from the **GO-TO** drop-down menu.
2. Click the **Course Iteration** menu tab to display the Search Results screen.
3. Enter Search criteria, if any, to find the desired course iteration; click the **GO** button.
4. Select "**View Lessons**" link on the course iteration record you wish to access. This link is found under the column titled “Schedule Lessons.”
5. Clicking the link displays the “Course Iteration Lessons” screen, and it shows a list of lessons within the course iteration that you selected in Step 4.
6. Click the Edit icon of the desired lesson. This will display details, in the “Course Iteration Section Details” screen, about that lesson, including a link to add group sections titled "Register Group(s)". NOTE: the link to add group sections will only be displayed if the lesson start date has not passed and the lesson is an instructor-led lesson.
7. Select "Register Group(s)" to assign sections to the selected lesson. This will display the list of groups that you created when you created groups. From this page you can manage the learners in the groups by clicking the "people" icon (icon that looks like people) or register the section for the lesson.
8. Register the Section by clicking the "Register" icon. This registers all the learners of that section for the lesson.

Training Delivery

The Training Delivery functions provide for the crediting of Learners; delivery of electronic training; monitoring of Learner progress; and post-instruction processing (posting grades and generating completion certificates). These functions allow the Instructors to perform numerous pre- and post-instruction activities. While these are primarily Instructor functions, the LMS provide you will the ability to perform them if necessary. Your functions include:

- View Roster
- Enter Notes
- Record Attendance
- Enter and Update Grades
- Credit Unregistered Learners
- Cancel Lesson

What is a Roster?

A roster is a list of all the students who have registered for a lesson. The roster can be viewed from the ***Roster*** page, and several roster management tasks can be performed from here.

Viewing the Roster

The LMS creates a roster for every lesson and course iteration in the Catalog. This roster is available for both active and past lessons. Viewing rosters is a critical action necessary to perform important functions associated with training delivery. While viewing the roster, you also make the ability to perform the following crucial functions:

- Add notes
- View Learners' personal information
- Perform waitlist actions
- Cancel registered Learners
- Substitute Learners
- View registration details.

Note: these functions are only available at the individual lesson level and not at the course iteration level.

To view the roster for a lesson, follow these steps:

1. Choose Lessons from the drop-down list in the upper right corner of the LMS.
2. Select Search on the Lesson tab and enter the appropriate search criteria and click Go.
3. Click the Edit icon next to the desired lesson. This will display the Lesson Details page.
4. In the Left Navigation Bar, click the Roster link. This will display the roster.

To view the roster for a course iteration, follow these steps:

1. Choose Catalog from the drop-down list in the upper right corner of the LMS.

2. Select Search on the Course Iteration tab and enter the appropriate search criteria and click Go.
3. Click the Edit icon next to the desired course iteration. This will display the Course Iteration Details page.
4. In the Left Navigation Bar, click the Roster link. This will display the roster.

On the roster page, the following functions may be performed.

Roster/Registration Administration Tasks

Course Managers perform registration tasks on the ***Roster*** and ***Registration*** pages, but not every task can be done on both pages.
The following table shows which lesson tasks can be done on each page.

Task	From Roster Page?	From Registration Page?
Cancel Registration	Yes	Yes
Record `No Shows'	Yes	No
Add Registration Notes	Yes	Yes
View Registration Details	Yes	Yes
Substitute Learner	Yes	Yes
Recording Attendance	Yes	No
Mark a Lesson Completed	Yes	No
Record Grades	Yes	No
View Online Test Results	Yes	No
Assign Resources to Learners	Yes	No

Most registration administration tasks can be performed through the lesson roster, which can be accessed in the **Lessons** module in the LMS.

Attaching Notes

You can add notes to any Learner on the roster for any lesson you can access. You can also add notes for the entire class. These notes are free text fields and remain after the lesson has been delivered. Entering notes is a useful function for recording information about a learner or the class. Such information might include documenting a reason for missed training.

Notes can be added to any lesson. One use of notes might be to document extenuating circumstances. These notes can be viewed by course managers, class managers, and instructors while the lesson is being taught, or after it has been delivered.

To add notes to a registration:

1. Select **Lessons** from the **Go-To** drop-down menu
2. Click the **Lesson** tab.
3. Click **Go** on the Left Navigation Bar.
4. Click the **Edit** icon of the lesson you wish to access.
5. Click the **Roster** link,
6. Click the **Registration Notes** icon next to a listed item.
7. In the ***Registration Notes*** page, either search for an existing note or create a new note by clicking the **Add New** link.
8. In the ***Add New*** page, select a category from the drop-down list and write the note in the text box.
9. Click **Save**.

Note: Notes also can be added in the ***Registrations*** page in the Lessons module

Record Attendance

Recording attendance is a critical process for granting learners credit for attending training sessions. The LMS tracks attendance on a lesson-by-lesson basis. If the lesson spans multiple days, an attendance list for each day is provided. While recording attendance, you also have the capability to mark a lesson as delivered or canceled, which will update the Learners' transcripts.

Record Attendance

A Course Manager or Class Manager can mark attendance for a learner in the ***Lessons*** module of the LMS. Attendance can also be marked by an instructor in the ***Instruction*** module.

To record attendance for a learner or a lesson in the LMS:

1. Select **Lessons** from the **Go-To** drop-down menu
2. Click the **Lesson** tab.
3. Click **Go** on the Left Navigation Bar.
4. Click the **Edit** icon of the lesson you wish to access.
5. Click the **Roster** link, and then the **Lesson Attendance** link
6. For each session, select either the **Mark All** check box for the entire lesson or check boxes for individual learners.
7. Click **Save**.

Enter and Update Grades

You can verify and enter test results into the LMS. If the test materials are non-electronic (e.g., paper-based), you must determine the results by using test answer keys, reading essays, running Scantron forms, or evaluating peer collaboration. If the test materials are electronic (e.g., online), the LMS automates the grading function. Many times, tests may be a combination of electronic grading and manual grading (e.g., a multiple choice test with an essay portion). In such cases of

composite test media, you must manually enter the grade for the non-electronic portions of the test.

When a course and its testing are self-paced and tests are mailed back for grading and evaluation, you can record in the LMS the dates that the material was received, graded, and recorded. Test results are posted to the Learner's individual training record.

Test results can contain various levels of detail including:

- Pass/fail
- Percentage correct
- Alpha-numeric scores
- Specific questions marked incorrect.

Future access to this information varies by rank, unit, role, and other types of access permissions.

Enter and Update Grades

To record a grade for a learner in the LMS:

1. Select **Lessons** from the **Go-To** drop-down menu.
2. Click the **Lesson** tab.
3. Click **Go** on the Left Navigation Bar.
4. Click the **Edit** icon of the lesson you wish to access.
5. Click the **Roster** link.
6. Click the **Grade Entire Lesson** link to display the ***Grade Lesson*** page.
7. Enter a value in the **Lesson Grade** field for the entire lesson or for any individual learner. If you enter a grade in the row for "Entire Class," you must click the down arrow next to the field to give it to all the learners.
8. Click **Save**.

Updating grades can be done up until the point that the lesson is "**Marked Delivered**."

If the lesson is associated with a course, the LMS will "roll-up" the grades from the individual lessons. From the Course Iterations tab in the Catalog module, the user can view the all the lessons and grades for individual learners, as well as a collection score for the course.

Credit Unregistered Learners

In a typical Army course, there are two dates: the date to report to the course and the start date. Some unregistered Learners may show up for the course on or before the start date. On the report date, you need to determine which Learners have reservations for the ATRRS-managed course, and which Learners are "walk-ins." If any Learners have not already registered for the course, you need to register them by logging into ATRRS to post the Learner as a walk-in. When the walk-in is approved, ATRRS sends the reservation for the course to the LMS using the same process as for other reservations made in the LMS.

On the Roster page, you can credit Learners for lessons not managed in the LMS. For non-quota-managed courses, you can use this function to credit a Learner who attends only part of a course or who attends the course but cannot register because the course has already begun.

Crediting Unregistered Learners

A lesson administrator can select learners for which they want to give credit for a lesson, although the learners have not registered for the lesson. Giving credit for a lesson does not create a registration, but the lesson is listed on the learner's transcript like a lesson completed in the normal way.

To credit an unregistered learner:

1. Select **Lessons** from the **Go-To** drop-down menu
2. Click the **Lesson** tab.
3. Click **Go** on the Left Navigation Bar.
4. Click the **Edit** icon of the lesson you wish to access.
5. Click the **Roster** link.
6. Click the **Credit Unregistered Learner** link.
7. Click the **Search for Learners** link to display a pop-up window.
8. Enter search criteria in the fields and click **Go** to list learners.
9. Select the check box next to one or more learner names and click the **Add** button at the bottom of the page. A confirmation message will appear to indicate the lesson credit was successfully recorded in the learner's transcript.

Cancel Lesson

The LMS supports canceling scheduled lessons and registrations for lessons. You can cancel a lesson at any time before the lesson is marked delivered. Canceling a lesson cancels all the registrations for the lesson. You would want to cancel a lesson if resources were not available, the minimum number of learners was not met, or other conflicts. Instructors also have the ability to cancel lessons.

Lessons can be cancelled by a provider any time before the lessons are marked delivered. Canceling a lesson cancels all the registrations for the lesson, as well as all the order lines for which lessons were requested. When a lesson is cancelled by a provider, no charges are incurred against the learners registered for the lesson.

Note: Instructors can also cancel a lesson through the **Roster** link.

To cancel a lesson in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list
2. Click **Lesson** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Click **Search** to find an existing lesson that you can edit.
4. Click the edit icon of the lesson you wish to edit.

5. Click **Main** in the Left Navigation Bar to display the ***Lesson Details*** page.
6. Select **Cancel Lesson** from the **Change:** drop-down list at the top of the page.
7. Enter a reason for the cancellation in the pop-up window.
8. Click **Save**. The cancellation date will be entered into the **Date Cancelled** field.
   Warning: This action cannot be undone.

Collaboration

The Collaboration functions allow Learners and other roles to participate in chat sessions, threaded discussions, and community groups. As a Course Manager, you also have a number of administrative functions.

Your functions include:

- Create Communities
- Manage Communities
  - Search for Communities
  - Add Experts to Communities
  - Add Attachments to Communities
  - Add Notes to Communities
  - Create Community Association
  - Monitor Discussion Threads

Creating Communities

A community is a place in the LMS where a group of peers can store attachments, link to URLs, and access experts for information. Communities also contain discussion thread and chat capabilities. You can create a new community and appoint the community administrator(s) or do it yourself. You can also appoint experts or allow any user to appoint themselves an expert.

For all items in the Training Catalog, the LMS automatically creates chat and discussion threads.

Collaboration administrators can create communities in the system, define community administrators, and make community associations, as well as add attachments and notes to a community.

To create a community:

1. From the **Go to** drop-down list, select the **Communities** module.
2. Click the **Community** tab.
3. Click the **Create** link. The ***Community Details*** page appears.
4. In the **Name** field, enter a name for the community.
5. Click the icon next to the **Security Domain** field to display the ***Domain Finder*** window.

To search for a security domain:

a. In the **Domain Name Like** text field, enter search criteria.

b. Click **Find**. A list of security domains matching the search criteria appears in the search results area.
Note: If no search criterion is specified, a list of all security domains in the system is returned in the search results.

c. Click the **Select** icon next to the security domain you want to use.

6. Select the **Enable** check box to specify if the community is available to learners.

7. Click the icon next to the **Community Administrator** filed to search for a user, who you want to appoint as a community administrator. By default, the ***Search for Internal People*** window appears. You can use the ***Search for Internal People*** window to search for LMS users.

To search for a user: specify search criteria. You can search by **First Name**, **Last Name**, **User Name**, **Business Unit**, and **Location**.

Note: If no search criterion is specified, a list of all internal/external users in the system is returned in the search results.

a. Click the **Select** icon to select the user, you want to appoint as a community administrator.

b. Click **Go**.

8. Select the check box which specifies whether users can add themselves to the community as experts.

If the check box is not selected, only Collaboration administrators can add users as experts for the community.

9. Select the check box which specifies whether users can add attachments to the community.

If the check box is not selected, only Collaboration administrators can add attachments to the community.

10. In the **Description** text field, enter a description for the community.

11. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area.

Enter information in the fields as required/desired.

12. Click **Save**.

Once a community is created, you can perform the following tasks for the community.

Task	For More Information, See:
Add / delete community experts.	TAB 77: "Adding/Deleting Community Experts"
Set community associations.	TAB 78: "Creating Community Associations"
Add attachments to a community.	TAB 79: "Adding Attachments to Communities"
Add notes to a community.	TAB 80: "Adding Notes to Communities"

Manage Communities

Once communities have been created, either by you or the LMS, there are number of functions used for monitoring those communities. These functions include searching and editing those communities. Once you have located the community, you can add subject matter experts, attachments, and notes to it.

Searching for Communities

To search for a community:

1. From the **Go to** drop-down list select the **Communities** module.
2. Click the **Community** tab. The ***Community Detail*** page appears.
3. In the search box enter a name for the community. **Note:** If no name is specified, a list of all communities in the system is returned in the search results.
4. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria.

The ***Search Results*** page allows you to edit a community. To do so, follow these steps:

1. In the ***Search Results*** page, click the **Edit** icon next to the community you want to edit. The ***Community Detail*** page appears.
2. Edit the community details, by performing one or more of the following tasks:
   - Edit community name.
   - Enable / disable the community.
   - Change the security domain.
   - Change the community administrator.
   - Allow users to add themselves as experts.
   - Allow any user to add attachments.
   - Edit the description of the community.
   - Edit custom fields.
3. Click **Save** to save the changes.

Permanently delete a community from the system by clicking the **Delete** icon. Once you click the **Edit** icon for a community, the ***Community Detail*** page appears. In this page you can perform the following tasks:

Task	For More Information, See:
Adding or deleting community experts.	TAB 77: "Adding/Deleting Community Experts"

Creating association for a community.	TAB 78: "Creating Community Associations"
Adding attachments for a community.	TAB 79: "Adding Attachments to Communities"
Adding notes for a community.	TAB 80: "Adding Notes to Communities"

Adding/Deleting Community Experts

To Add/Delete An Expert

1. From the **Go to** drop-down list select the **Communities** module.
2. Click the **Community** tab. The ***Community Detail*** page appears.
3. In the search box enter a name for the community.'
4. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert. **Note:** If no name is specified, a list of all communities in the system is returned in the search results.
5. In the Left Navigation Bar, click the **Experts** link. The ***Experts*** page appears, displaying a list of all the experts in the community.

Adding Experts

To Add An Expert:

1. In the **Select a Category** drop-down menu, select **Employee** to search for a user. **Note:** Selecting "Client" will not return any results.
2. Click **Find**. The ***Employee Finder*** section appears.
3. Enter search criteria. You can search by one or more of the following parameters: **Username**, **First Name**, **Last Name**, **Business Unit**, **Social Security No.**, **MOS**, and **Location**. **Note:** If no search criterion is specified, a list of all internal/external users is returned in the search results.
4. Click **Find**. A list of all users matching the search criteria appears.
5. Select check boxes next to the users you wish to nominate as experts for the community.
6. Click **Done** to add the selected users as experts for the community.

Deleting An Expert

To delete an expert, click the **Delete** icon next to the community expert you wish to delete. Once deleted from the list of experts, a learner is no longer an expert for the community.

Working With Attachments and Notes

As a Collaboration administrator, you can add two types of attachments to communities: files and Web pages. From the **Go to** drop-down list select the **Communities module**.

1. Click the **Community** tab. The ***Community Detail*** page appears.
2. In the search box enter a name for the community.'
3. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert.

Note: If no name is specified, a list of all communities in the system is returned in the search results.

To Add An Attachment:

1. In the Left Navigation Bar, click the **Attachments** link. The following two sections appear:
   - Attachment List, displaying a list of all attachments in a community.
   - New Attachment, which allows adding new attachments to a community.
2. In the New Attachment section:
   a. In the **Name** text field, enter a name for the attachment.
   b. From the **Category** drop-down list select a category.
   c. From the **Language** drop-down list select a language.
   d. Select the **Private** check box if you want to make the attachment unavailable for other learners.
   e. Select one of the following check boxes:
   f. **Enter URL**, if your attachment is a Web page.
   g. **Upload file**, if your attachment is a file.
   h. Enter a URL for a Web page or path for a file.
3. Click **Add to List**.

Adding Notes to Communities

Notes allow Collaboration administrators to share information and comments about communities. Notes are available only for Collaboration administrators.

You can search for notes created in the system, as well as create your own notes for a community.

From the **Go to** drop-down list select the **Communities module**.

1. Click the **Community** tab. The ***Community Detail*** page appears.
2. In the search box enter a name for the community.'

3. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert.

Note: If no name is specified, a list of all communities in the system is returned in the search results.

Searching for Notes

To search for notes:

1. In the Left Navigation Bar click the **Notes** link. The ***Community Notes*** page appears.
2. Enter search criteria and click **Go**.

Creating Notes

To create notes:

1. In the Community Notes page, click the **Add New** link to display the ***Add Notes*** page.
2. Add notes and click **Save**.

You can also associate the community with a role, MOS/Career Field, Skill, or Course. This is just another way to link similar learners together in one community.

Creating Community Associations

A community can be focused on one or more of the following object types:

- Role
- MOS/Career Field
- Skill
- Course

Note: If no name is specified, a list of all communities in the system is returned in the search results screen.

As a Collaboration administrator, you can specify on what objects a community is focused by creating associations. These associations appear in the ***Communities of Practice*** page for learners.

To create an association:

1. From the **Go to** drop-down list select the **Communities module**.
2. Click the **Community** tab. The ***Community Detail*** page appears.
3. In the search box enter a name for the community.'
4. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert. **Note:** If no name is specified, a list of all communities in the system is returned in the search results.

5. In the Left Navigation Bar click the **Association** link. The ***Association*** page appears, displaying a list of all the associations created for the community.
6. Form the **Select a Category** drop-down list, select an object type: **Internal / External role**, **Internal / External job type**, **Skill**, and **Course**.
7. Click **Find**. The ***Finder*** section appears.
8. Specify search criteria and click **Find**. If no search criteria are specified, a list of all records in the system of the object type is returned in the search results.
9. Select check boxes next to the objects with which you wish to create an association.
10. Click **Done**.

You can also monitor the discussion threads of the community. This is useful for determining if appropriate content is being discussed and posted in the community.

Monitoring Discussion Threads

Monitoring discussion threads involves viewing the discussion threads and potentially removing Learners from the community.

View Discussion Threads

1. Select My Home from the Go-to: module list and select the Communities tab.
2. Select Personal Communities for those you created and monitor or Communities of Practice for additional communities you may monitor related to courses, MOSs, skills, or roles.
3. Click on the name of the community you with to view the discussion threads of and select Discussion Board in the row of Community Actions.
4. This will contain the topic list, from which you may click the titles to view the contents of each topic.

Remove Learners

1. Select My Home from the Go-to: module list and select the Communities tab.
2. Select Personal Communities for those you created and monitor or Communities of Practice for additional communities you may monitor related to courses, MOSs, skills, or roles.
3. Click on the name of the community and scroll down to Community Interested Learners.
4. Click the Trash Can icon next to the Learners you would like to remove from the community.

Evaluation

The Evaluation functions include creating, delivering, and recording critiques and providing for review of products and courses. Your only function is here is view critique results.

View Critique Results

Once critiques have been created by a Course Manager and completed by Learners, you have the ability to view the results of the critique. You would view the critique results to assess the successes or shortcomings as documented by the critiques.

Viewing Results

To view the results for a critique:

1. Select Communities from the Go-to: Drop-down list and select the Critique tab.
2. Search for the name of the critique; click the name of the desired critique.
3. In the ***View Critique*** page, click the **View Results** link in the right-top corner.

The ***View Results by Learner*** page appears displaying all the submitted responses for the critique.

Create Reports

The LMS provides pre-defined reports on a wide range of data. You can access data and reports in some or all of the modules found in your drop-down list, with the exception of My Home. Exactly what you will see depends on your role and your security privileges.

Once you select one of the modules in the drop-down, the LMS displays the Reports tab, which lists the available reports for that module. Some reports may be available within multiple modules. For example, "Classroom Instructor Assignments" may appear under "Lessons," "Instruction," and "Resources" since not everyone has access t all three modules.

Once you have located the desired report, select it. Depending on the contents of the report, the LMS may prompt you to enter more information before the report is generated (e.g., the "Roster" report prompts you for the lesson number). After you enter any additional data, the LMS generates and displays that report. From the report displayed on the screen, you can print out the report, export it as a file to your computer, or search the text.

When you request a report from over the web, you must be careful that you get the correct data. If you attempt to run the same report a second time but with new information (e.g., a new lesson number), your browser may call up the first report from the memory cache on your computer. To avoid this, click the Refresh icon on the Reports viewer. The report data will be refreshed according to your new entries.

Running/Viewing System Reports

To run/view a system report in the LMS:

1. Access the LMS.
2. Choose one of the modules from the drop-down list. The system displays the tabs for the module. If the module supports running reports, a **Reports** tab is displayed.
3. Click the **Reports** tab. A list of the system reports that have been assigned to the current module is displayed. If no system reports have been assigned to the current module, the page does not display any reports.
4. Select the name of the report you wish to run.

5. If required, enter parameter information and click Submit. If no parameter fields appear, simply click Submit.

Note: When running a report over the web, if you attempt to run the same report a second time, your browser might call the report from cache. Click the refresh icon on the reports viewer. The report data is refreshed according to your input.

Find User Roles

The LMS allows you to view the roles of other users. To accomplish this, select **People** from the **Go-to:** Drop-down list. Enter the criteria for the specific user and select **Go**. On the main page, it will have **Primary Role** listed. If the user is associated with other roles, those will be list in the **Security Roles** tab in the Left Navigation Bar. Click on the **Security Roles** list to find any additional roles associated with the user.

LEARNING MANAGEMENT SYSTEM

Chapter 10

Course Manager

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Course Manager's Functions within the LMS

In this chapter, you will obtain a greater understanding of the LMS and the system functions you will use in the role of a Course Manager. Listed below are the modules that are accessible in the LMS for the Course Manager role, together with the Tabs (from the Tab Bar) associated with that module, and the links located in the left navigation bar associated with each Tab. Modules are found by clicking within the **Go- To** drop down box in the upper right quadrant of the LMS screen.

Go-to:	Tab	Left Navigation Bar
My Home This module (the default module for all users) allows you to view your training information including transcript and registrations as well as search the catalog and launch collaboration functions.	My Home	Registrations Development Plan Search Training Catalog Find Experts Find Communities Order History Transcript
	My Development	Registrations Transcript Skills Skills Gap Development Plan Course Progression Individual Training Plan
	Training Catalog	Search (**Full Catalog** & **Lesson Only** links)
	Information Resources	AKO link
	Communities	Communities of Practice Personal Communities Q & A People Online Search (Internal People, External People, Communities, and Documents)
	Experts	Find Subject Matter Experts Communities in which I am an Expert Search (Experts)
	Assessments	Critiques
	Personal Info	Main Information Lesson Requests Job Profile Personalize Catalog Personalize Homepage Search (Order History)

Registrar (Internal)	User	No links, search capability only

Go-to:	Tab	Left Navigation Bar
This module allows you to view and manage your unit(s), including registering members of your unit for training.	Unit	No links, search capability only
	Training Catalog	No links, search capability only (for "Full Catalog" and "Lesson Only")
	Ad Hoc Learning	No links in Left Navigation Bar.
	Lesson Requests	No links in Left Navigation Bar.
	Order History	No links, search capability only. "Create Today's Shipment List for ATRRS or ACCP" button
	Reports	Select from available reports' links.
Catalog This module allows you to create, edit, and delete catalog items, including products, courses, and instructional units.	Curriculum	Create Search
	Lesson Template	Create Search
	Product	Create Search "Get All Items" or "Get Items for Reorder" buttons
	Course Iteration	Create Search
	Roster Template	Search
	Courses	Create Search
	Library	Search
	Skills	Search Create Skill Create Group
	Reports	Select from available reports' links.

Lessons This module allows you to create, edit, and delete instructional units.	Lesson	Search Create
	Session Template	Search Create
	Lesson Requests	Search Search Lesson Requests
	Lesson Batch	Search Create
	Registrations	Search for Lessons
	Reports	Select from available reports' links.

Communities This module allows you to create, view,	Community	Create Search
	Critique	Create Search

Go-to:	Tab	Left Navigation Bar
and manage critiques and communities.	Questionnaire	Create Search
	Q & A	(This is a popup screen.)
	Reports	Select from available reports' links.

Content This module allows you to add and manage electronic content (e.g., SCORM, AICC).	Content	Search Add Content Create Folder
	Content Server	Search
	Reports	Select from available reports' links.

Information This module allows you to add information resources to Learner's homepages. This would primarily be used for adding URL links.	Homepage	No links
	Information Category	Search
	Reports	Select from available reports' links, if any.

People This module allows you to view user's information as well as create and view LMS roles and MOSs.	User	Search
	Internal MOS / Career Field	Search
	Internal Role	Search Create
	Reports	Select from available reports' links, if any.

Resources This tab allows you create, edit, and delete resources. Management of the resources occurs in the Catalog module.	Facility	Search
	Equipment	Create Search
	User	Search
	Location	Search
	Building	Create Search
	Batch Resources	Search for Lessons Assigned Resources Also checkbox

Go-to:	Tab	Left Navigation Bar
	Service Provider	Create Search
	Reports	Select from available reports' links, if any.

Course Management

The Course Managers' functions include the long-range scheduling of iterations for Army courses. This includes defining the start dates, end dates, and maximum capacity. This function also schedules the fixed time periods for activities that require system resources such as video teleconference (VTC) capabilities and collaboration licenses. For most formal Army courses, these functions are allocated to the Army Training Requirements and Resources System (ATRRS) and are received into the system through the ATRRS interface. Other courses may be scheduled within the LMS functionality.

- Create and Edit Courses, Phases, Modules, and Lessons
- View Courses, Products
- Insert New Versions

Create and Edit Courses, Phases, Modules, and Lessons (Events)

There are two ways for courses and products to get in the LMS: through another Army system or manual creation. Some of the courses and product entries available through the LMS will be created by another Army system and migrated into the LMS manually. Within the LMS, you will create the course iterations, schedules resources, and updates the Training Catalog so registration can begin. However, the LMS also allows you to update existing versions or create new courses, phases, modules, lessons and/or product entry when the item is needed for a particular School or training intervention and it is not available from another Army system.

To create a course, you must first create the lesson templates and products before creating the course and defining the modules. If you wanted lesson iterations that were not associated with courses, you would only need to create the lesson template and schedule the lesson iterations. After you have created these items, you will have the ability to edit them. Editing includes modifying the general information about the training item (e.g., name, location, duration) as well as adding attachments, prerequisites, notes, etc. Links to the specific editable fields and additional edit functions (e.g., adding attachments) can be found with the help files for the item. (See TAB 11, "Attachments".)

Templates and iterations are created by two separate processes. Templates contain all the general details about the learning item; iterations are scheduled instances of the template. Templates must always be created before iterations can be scheduled; however, once the template has been created, there is no limit to the number of iterations that can be scheduled using the template.

Several general templates have been developed for your use. These include:

Template Name	Template ID
Study Hall	SH-01
Examination	TBD
Graduation	TBD
Training Surveys	TBD

Note: A Lesson and an Event are created and maintained by the LMS in the same manner. Throughout this document, whenever you see the word "lesson" it is synonymous with "event." Therefore, if you were instructed to create an education/training event or training support event, you would follow the steps for creating a lesson template, then scheduling a lesson iteration.

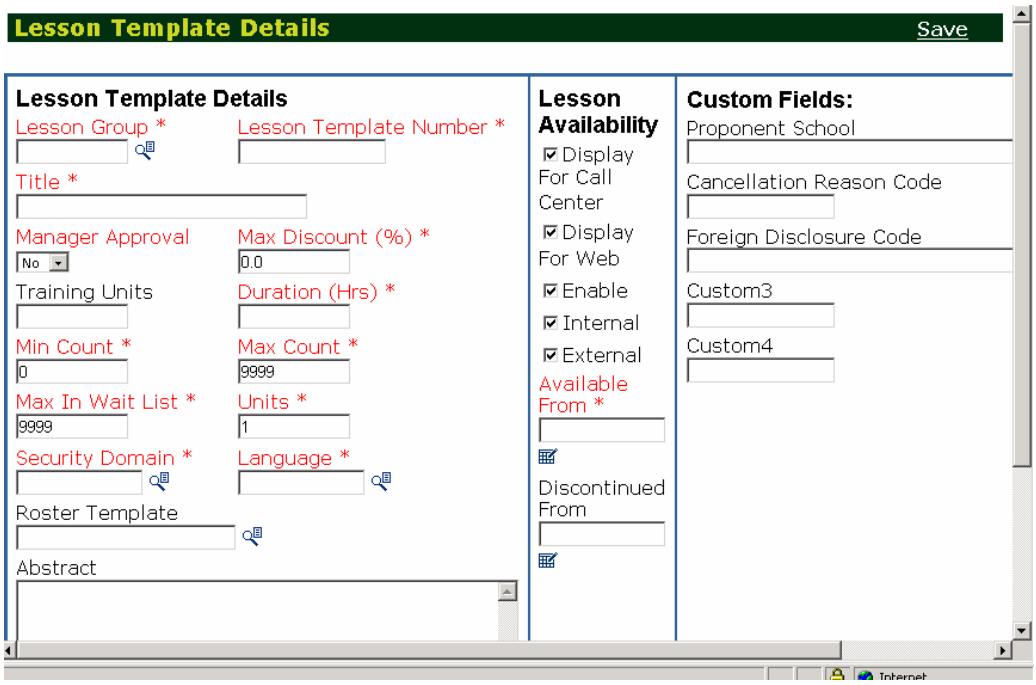
- Lesson Template – The information and details upon which a lesson iteration is scheduled. It contains basic information such as lesson title and duration.

Create and Edit Lesson Templates

To create a Lesson Template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.

2. Click **Lesson Template** on the menu and click the **Create** link in the Left Navigation Bar to display the Lesson Template Details form to define a new Lesson Template.



3. Enter ***required*** information for creating the lesson template:

Required Information	Description
Lesson Group	Use the Finder icon to select a product group for the lesson template. The product group specifies how the lesson template is grouped in the Training Catalog.
Lesson Template Number	Enter a part number for the lesson template. You must enter an alphanumeric string that uniquely identifies the lesson template. The part number can be used to search for and order the lesson template. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. **Note** If the prefix appears, do ***not*** delete or change the prefix. The system requires product group prefixes to be included in all part numbers.
Title	Enter the title for the lesson template. Lesson template title can be specified as criteria when searching the Training Catalog. In addition, the title of a lesson template is displayed for all lessons scheduled for the lesson template.
MAX DISCOUNT (%)	***This field is now on LMS screen, but not documented in SABA help.***
Duration (Hrs)	Enter the length of the lesson template in hours.
Min Count	Enter the minimum number of students required to deliver lessons for the lesson template. This value can always be overridden when scheduling lessons.
Max Count	Enter the maximum number of students that can register for the lessons for the lesson template. This value can always be overridden when scheduling lessons.
Max in Waiting List	Enter the maximum number of students that can be on the waiting list for the lessons for the lesson template. This value can always be overridden when scheduling lessons.
Units	If you are tracking your lesson templates by units, enter the number of

	units to which this lesson template is equal. The default is one.
Language	Use the Finder to select the lesson template language. This language is used as the default for lessons created for the lesson templates. **Note:** Lesson templates can have more than one language. After the lesson template is saved, a link, **Language**, is displayed in the left navigation bar. Using this link, you can enter additional languages in which the lesson template is offered.
Display for Call Center	Select this check box to display the lesson template in the Training Catalog for Call Center registrars (LMS Client).
Display for Web	Select this check box to display the lesson template in the Training Catalog for learners, managers, and group administrators, as well as web registrars.
Enable	Select this check box to enable the lesson template.
Internal	Select this check box to designate the lesson template as orderable for employees.
External	Select this check box to designate the lesson template as orderable for clients (external users).
Available From	From the pick list, select the first date the lesson template will be available.

7 Enter any known ***optional*** information for the lesson template:

Optional Information	Description
Security Domain	Select a security domain for the product group from the pick list. If no domain is specified, the system automatically assigns the `world' domain. NOTE: Only those users who have security privileges within the Security Domain you select will be able to perform their respective operations within this lesson template and subsequent lessons.
Roster Template	Select a roster template for the lesson template from the pick list. The roster template you select is used to automatically create a list of reserved seats in the lessons created for this lesson template. When you create a lesson for a lesson template, you cannot override the roster template, if one exists, for the lesson template. To remove or edit the roster seating created by the roster template, you must manually

	delete/update the individual reserved seating entries for the lesson once the lesson is created.
Abstract	Enter an abstract, up to 1024 characters long, for the lesson template.
Manager Approval	Indicates whether Manager's approval is required to take this lesson.
Training Units	
Discontinued From	Date beginning when course can no longer be taken.

If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area.

The three custom fields are: Proponent School, Cancellation Reason Code, and Foreign Disclosure Code. Currently, the Custom3 and Custom4 fields are not used.

Enter information in the fields as required/desired.

8. Click **Save** to save your information and create the lesson template.

Edit Lesson Template

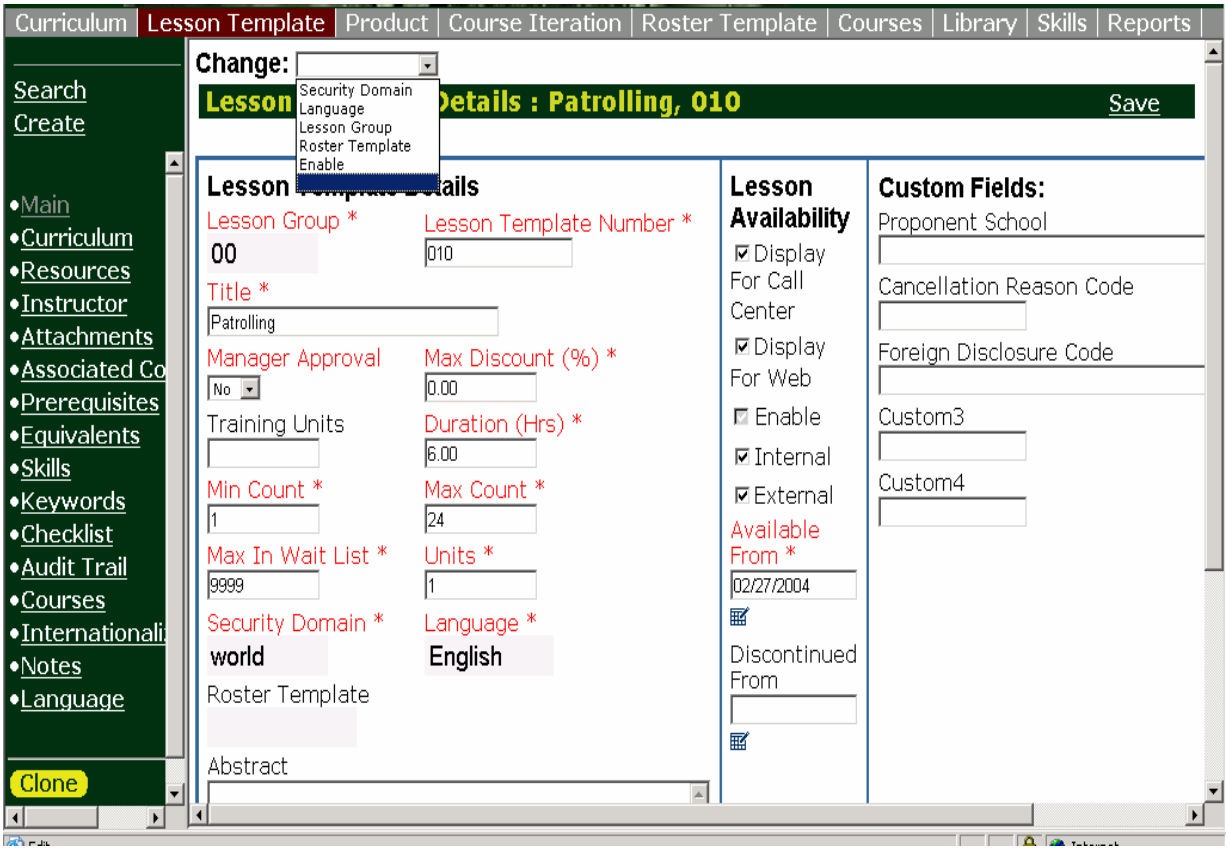
After you have created the lesson template, you may edit the specified attributed or add additional information. To edit:

1. Select **Catalog** in the **Go to:** drop-down list.

2. Click the **Lesson Template tab** and click the **Search** link in the Left Navigation Bar.

3. Enter the search criteria and press GO.

4. Find the desired lesson template and click the Edit icon. This displays a Lesson Template Details page, as shown below.



5. You can edit the information on the Lesson Template Details page using the Change drop-down box.

6. You can edit additional information (e.g., attachments, prerequisites) using the Left Navigation Bar links. See the links below for more information about that.

After the system creates the lesson template, links to the following pages are displayed:

Page	For More Information, See:
Resources	TAB 23: Adding Resource Types and Assigning Resources to Lesson Templates
Instructor	TAB 24: Designating Qualified Instructors for a Lesson Template
Attachments	TAB 11: Attachments
Associated Content	TAB 25: Viewing Content Associated with Lesson Template
Expenses	TAB 26: Defining Expenses for a Lesson Template

Prerequisites	TAB 27: Specifying Prerequisites for a Lesson Template
Equivalents	TAB 28: Specifying Equivalents for a Lesson Template
Skills	TAB 29: Assigning Competencies to a Lesson Template
Keywords	TAB 30: Specifying Keywords for a Lesson Template
Checklist	Defining a Checklist for a Lesson Template
Audit Trail	TAB 13: Viewing Audit Trails
Course (for which the course is required; display only)	TAB 32: Course Overview
Internationalization	TAB 37: Multi-Language Objects
Notes	TAB 14: Notes
Language	TAB 38: Specifying Languages for a Lesson Template

- Lesson Iteration – Scheduled lesson template; smallest unit in the LMS that can be registered for; designed to achieve a single function objective. Allows you to schedule lesson iterations at varying locations and for various times, including contiguous and non-contiguous time periods.
-

Schedule and Edit Lesson Iterations

Scheduled lessons are created and maintained in the **Lessons** module in the LMS. Students are registered for scheduled lessons through orders created in the **Registrar** module (manager) or **My Home** (learner self-registration). These same steps are used to create all instructional units (except products) with courses.

To schedule a lesson in the LMS:

1. Select **Lessons** in the **Go to:** Drop-Down list.

2. Click **Lesson** on the menu and click the **Create** link in the Left Navigation Bar to display a form to define a new lesson.

3. Enter the ***required*** information needed to define the lesson.

Required	Description

Information

Lesson Number	Auto-generated based on Lesson Template.
Lesson Template	Use the Finder to select the appropriate lesson template for the lesson. Lesson Templates are created in the Catalog Go-to: module list.
Location	Use the Finder to select a location for the lesson. Note that this field is disabled if the `Location/Facility Relationship' business rule is enabled. When you select a facility for the lesson, the location for the facility is automatically entered in this field.
Start Date	Use the Calendar to select a start date for the lesson.
End Date	Auto-generated based on Start Date and Session Template
Session Template	Use the Finder to find and select a session template for the lesson. A session template is the weekly schedule that the lesson iterations is taught. It can be consecutive days and times, or it can non-consecutive days and times. For example, Monday - Friday 0900 to 1700 would be a session template. As would, Monday 1000 to 1200 then Thursday 1300 to 1500. These templates can also be created using the same steps described in the following link while scheduling a lesson. There is a link by Session Template field that allows you to create a weekly session template. For more information about Weekly Session Templates, see TAB 44: Creating a Weekly Session Template
Lesson Type	Select a lesson type from the drop-down list. This is information only.
Delivery Type	Select a delivery type from the drop-down list. This is information only.
Min Count	Enter the minimum number of students for the lesson.
Max Count	Enter the maximum number of students for the lesson.
Max in Waiting List	Enter the maximum number of students who can be added to the lesson waiting list.
Security Domain	Select a security domain for the lesson from the pick list in the Security Domain field.
Max Discount	This field is not being used; enter a "0" if the field is required.
Language	Select the lesson language from the drop-down list. Lessons can have more than one language. After the lesson is saved, a link, **Language**, is displayed on the left. Using this link, you can enter additional languages in which the lesson is offered.

Enter any ***optional*** information for the lesson:

Optional Information	Description
Display for call center	Select this check box to display the lesson in the Product Catalog for registrars.
Display for web	Select this check box to display the lesson in the Product Catalog for learners, managers, and group administrators.
Available	Select this check box to make the lesson available for ordering.
Internal	Select this check box to designate the lesson as for users.
External	Functionality not used. Should be left checked.
Customer Service Rep	
Virtual Classroom	
Credit Quantity	
Building	Use the Finder to select a facility for the lesson. This field is required only if the `Location/Facility Relationship' business rule is enabled. If the business rule is disabled, this field is optional.
<Custom Fields>	Enter information in any custom fields that have been defined, e.g., ATRRS ID.

Note that the system will enter all fields that are grayed out.

4. Click **Save** to save your information and to schedule the lesson.

Edit Lessons

After you have scheduled the lesson, event, or instructional unit, you may edit the specified attributes or add additional information. To edit:

1. Select **Lessons** in the **Go to:** drop-down list.

2. Click the **Lesson tab** and click the **Search** link in the Left Navigation Bar.

3. Enter the search criteria and press GO.

4. Find the desired lesson and click the Edit icon.

5. You can edit the information on the main page using the drop-down list above the main page information.

6. You can edit additional information (e.g., attachments, prerequisites) using the Left Navigation Bar links. See the links below for more information about that.

PAGE	DESCRIPTION
Resources	Click this link to assign resources for the lesson. For more information, see TAB 39: "Assigning Resources"
Lesson Site	Use this link to view address details for the site where the lesson is taught.
Budgeted Expenses	Click this link to record budgeted expenses for the lesson. For more information, see TAB 40: "Recording Budgeted Expenses".
Actual Expenses	Click this link to record actual expenses for the lesson. For more information, see TAB 41: "Recording Actual Expenses".
Attachments	Click this link to add attachments to the lesson. For more information, see TAB 11: "Attachments".
Associated Content	Click this link to view any content associated with the lesson. For more information, see TAB 42: "Creating and Managing Lessons".
Manager Approval	This link allows you to define whether manager approver is required for this lesson. In order to make manager approver required, the **Amount** field needs to be set to "1".
Cancellation Charges	Click this link to define cancellation charges that occur during periods before and during lessons. For more information, see TAB 55: "Canceling Scheduled Lessons".
Lesson Sessions	Click this link to see details on lesson sessions.
Roster Seating	Click this link to display a page that allows you to add seats to the lesson. See TAB 56: Roster Seating
Audit Trail	Certain actions are recorded in an audit trail that you can view. For more information, see TAB 13: “Viewing Audit Trails”.
Section	Click this link to display a page that allows you to add sections to the lesson.
Notes	Click this link to add or view notes for a lesson. For more information, see TAB 14: “Notes”.
Roster	Click this link to perform lesson management activities--including viewing the learners in the lesson, recording grades, marking attendance, and crediting unregistered learners.

Creating a Weekly Session Template

To create a weekly session template in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list.
2. Click **Session Template** on the menu and click the **Create** link in the Left Navigation Bar to display a form to define a new session template.
3. Select the **Weekly** radio button to specify the template as a weekly session template. The LMS enables the No. of Weeks field.
4. Enter the ***required*** information needed to define the session template.

Required Information	Description
Session Template Name	Enter a name for the template in the Template Name field. **Tip** Enter a descriptive name so you and other users can easily identify the template. For example, you could use `TTH(6-9)' for lessons that are held Tuesday and Thursday, 6 pm to 9 pm.
No. of Weeks	Enter the number of weeks for the session template.

5. Click the **Apply** button to list the session at the bottom of the page.
6. Enter the ***required*** information needed to define the session.

Required Information	Description
Name	Enter a name for a session.
Day	Select the day of the week from the drop-down list.
Start Time	Use the Time icon to enter a start time.
End Time	Use the Time icon to enter an end time.

7. Select the check box if this is the first session of the template. Click **Add** to add the session to the template. The LMS automatically displays the number of weeks you specified for the session template and adds the session to each week.

   To add additional sessions to the template, repeat these steps.

   To change the information for a session, select the session and change the desired information in the fields, then click **Update**. The LMS automatically refreshes the display to reflect your changes **Tip:** To quickly and easily add another session that is similar to

the last added session, simply enter a different session name, change the desired information (day of the week or start and end times), then click **Add**.

8. Click **Save** to save your information and to create the template.

This process is used for creating training products in the LMS, such as CD-ROMs, as well as creating inventory.

Creating Products and Inventory in the LMS

1. Select **Catalog** in the **GO-TO:** drop-down menu list.
2. Click the **Product tab** on the menu.
3. Click the **Create** link in the Left Navigation Bar to display the product page for creating a new.
4. Enter the ***required*** information for creating the product:

Required Information	Description
Product Group	Select the product group under which the product is classified in the Product Catalog.
Part Number	Enter a part number for the product. You must enter an alphanumeric string that uniquely identifies the product. Part number can be used to search for and order the product. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. **Note** If the prefix appears, do ***not*** delete or change the prefix. The system requires product group prefixes to be included in all part numbers.
Name	Descriptive name of the product.
Category	User-defined category which specifies the product type/media (e.g. WBT, Assessment Test, Video). The category also specifies whether the product is shippable or launchable/downloadable.
Available From	Select the date the product will be available.

5. Enter any ***optional*** information for the product:

Optional Information	Description
Security Domain	Select a security domain for the product.
Discontinued From	Select the date after which this product is no longer available.
Available Quantity	(Display only) Displays the total number of units available at all the locations for the product. The field is incremented when you enter quantity numbers for the product in the ***Inventory*** page. The field is decremented when you add the item to an order. **Note:** This field only applies to shippable products. For downloadable/launchable product, this field is empty.
Reserved Quantity	(Display only) Displays the total number of units that have been reserved for open orders. The field is incremented when the product is added to an order in an order. The field is decremented when the item in an order is shipped. **Note:** This field only applies to shippable products. For downloadable/launchable product, this field is empty.
Training Units	Enter the number of training units to charge for the course. By entering a number in this field, you specify the lesson template as able to accept training units in place of other payment methods in customer orders. **Note:** Training units are not affected by price bands or custom pricing.
Abstract	Enter an abstract, up to 1024 characters long, for the product.
Vendor	Select a vendor name for the product.
Manufacturer	Select a manufacturer name for the product.
Version	Enter a value if you want to track versions of the product.
Display for Call Center	Select this check box to display the product in the Training Catalog for Call Center registrars (LMS).
Display for Web	Select this check box to display the product in the Training Catalog for learners, managers, and group administrators, as well as web registrars.
Internal	Select this check box to designate the product as orderable for employees.
External	Select this check box to designate the product as orderable for clients (external users).
Use as	Select this check box to indicate the product can be used as inventory for

Resource lesson iterations. To create inventory, you must assign it to a location.

6. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area. Enter information in the fields as required/desired.
7. Click **Save** to save your information.

Edit Products

After you have created the Product, you may edit the specified attributes or add additional information. To edit the product:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Product tab** and click the **Search** link in the Left Navigation Bar.
3. Enter the search criteria and press Go.
4. Find the desired product and click the Edit icon.
5. You can edit the information on the main page using the drop-down list above the main page information.
6. You can edit additional information (e.g., attachments, prerequisites) using the Left Navigation Bar links. See the links below for more information about that.

After the system creates the product, links to the following pages are displayed:

- Attachments
- Associated Content
- Skills
- Prerequisites
- Equivalents
- Keywords
- Audit Trail
- Courses
- Inventory Location
- Internationalization
- Notes

Creating and Editing Modules

Before You Create a Module

Before you can create a module, you have input some course and phase information first. You have to create at least one module in order to create a course template. To do so:

1. Select the **Catalog** option from the **GO-TO**: drop-down menu.
2. Click the **Courses** tab.
3. Enter the search criteria, if any, to display your desired course.

4. Locate your course name on the Search Results screen; click the **Edit** icon to the left of the course name to display the "Course Details" screen.
5. Now, click either of the **Course Phases** links that are found in the right-hand corners of the "Course Details" screen.
6. This displays the "Course Phases" screen for your course selection. Click the Edit icon to reveal all the associated courses in the "Course Phase Details" screen.
7. To **add a new course module**, click the **Add New** link above the first record. (See "Create a Module" below.)
8. To **add a new course iteration**, click the **Create Course Iteration** link in the upper, right-hand corner of the screen.
9. To **delete** one of the showing course modules, click the corresponding **trash can** icon on the right side of the screen.
10. Be certain to click the **SAVE** link in the upper right of the screen to retain your changes. Failing to do this means that your changes will not take effect. To discard the changes, simply click the **BACK** link at the top, right of the screen.

Create a Module

1. Click Add New

2. Enter the Name and Available From date as required information; Discontinued from and Acquire with fields are optional.

3. Click Add New

4. Enter the Name and Number of Offerings required to finish module.

5. Click Add New

6. Select the learning offerings you want by clicking GO, which display all the offerings available.

7. Select all of the items you wish to include by clicking the open check box on the left of each item. You can designate this specific module as required by selecting the **Required** check box. You must indicate the number of choices the learner is required to complete by entering a number in the field. The number of learning offerings in a version must be equal to or greater than the number entered into this field.

8. Click **SAVE** the upper right corner of the screen. Failure to execute this step means your changes will not be retained in the LMS.

Edit a Module

There are two ways to edit modules, (1) from the courses tab, (2) from the course iterations tab. You would choose the latter to modify modules for a specific iteration, and the former so to affect all future iterations.

(1) Editing from the Courses Tab

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Courses tab** and click the **Search** link in the Left Navigation Bar.
3. Enter the search criteria and press Go to display the courses.
4. Find the desired course and click the Edit icon to display the Course Details window.
5. Click the Course Phases link on the upper or lower right of the Course Details window.
6. Click the Edit icon of the version with contain the module you want to edit, which will display the Course Phases window.
7. Click the Edit icon of the module you want to edit, which will display the Course Phase Details window.
8. Click the Edit icon of the module you want to edit to display the Course Module Details window. On this window, you can delete learning offerings (by clicking the "Trash Can" icon associated with the offering), add more offerings to the same module (by clicking the "Add New" link above the records), or change the information about the module specified in the Name field.

(2) Editing from the Course Iterations Tab

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Course Iteration tab** and click the **Search** link in the Left Navigation Bar.
3. Enter the search criteria and press Go to display the Search Results window.
4. Find the course iteration you wish to edit and click its associated Edit icon. This displays the Course Iteration Details window.
5. Click the Course Iteration Lessons link in either of the right corners of the new window to display the Course Iterations Lessons window.
6. Click the Edit icon next to the name of the Iteration Lesson you want to edit to bring up the Course Iteration Section Details window.
7. Now you can delete the learning offerings (by clicking the "trash can" icon that corresponds to the offering), add more offerings to this lesson (by clicking the "**Add New**" link above the listing), or change the **Description** and **Manager Approval** information about the module.

Create and Edit Phases

Create Phases

Phases are collections of modules, lessons, and products designed to meet a training objective. Phases are created during the course template creation process.

1. Select Catalog from the Go-to: Drop-down list. Select the Courses tab.
2. If the course template already exists, use the **Name Like** search field to find the desired template and click the associated Edit icon to bring up the **Course Details** window. If the template does not already exist, click Create and enter the required information.
3. Click the **Course Phases** link in the upper right corner of the Main Information page, which displays the Course Phases window.
4. Follow the steps to creating modules and adding learning items covered in the section, "Create a Module," above

Edit Phases

1. Select Catalog from the Go-to: Drop-down list. Select the Courses tab.
2. Enter search criteria to find the course template where the phase exists. Click on the Edit icon next to the desired course template.
3. Click the Phases link in the upper right corner of the Main Information page.
4. Click the Edit icon next to the phase you want to modify.
5. As required, you can modify any information, delete modules, or edit existing modules.

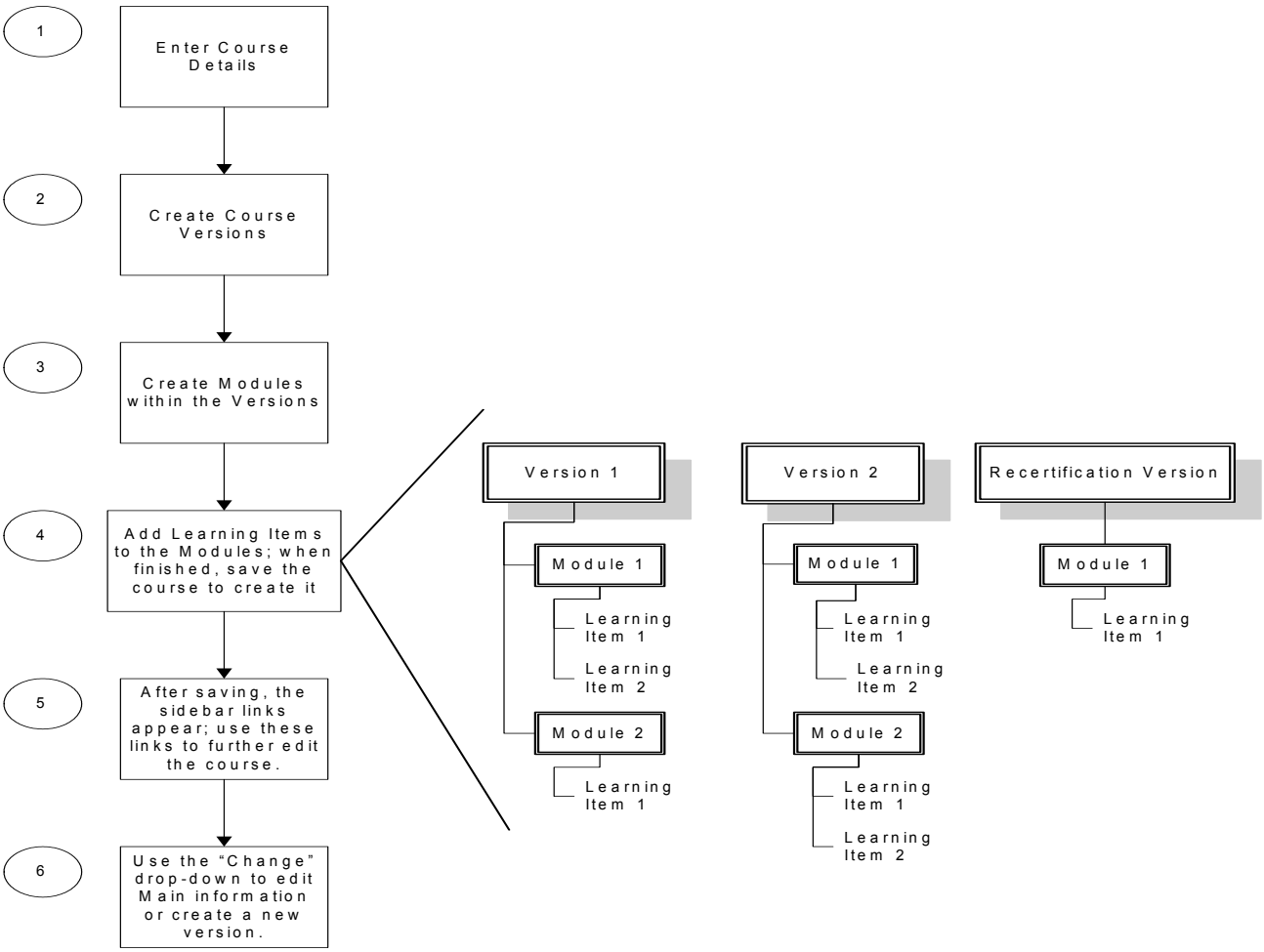
Create and Edit Course Templates

Create Course Template

Because courses are based on products, lessons, and other instructional units, you must first define (create) these in your catalog before you can assign them to a course. When you create a course template as an object in the system, it can then be found by searching for it, it can be assigned to learners, and it can be edited in several ways to make it more powerful or flexible. An administrator can create a basic course, and then return to it as needed to edit it. Or the course can be fully defined when it is created, with no (or few) changes made during its life cycle. In either case, the administrator will probably want to make a new version when significant changes are required, since that method can be used to plan the effect on large numbers of learners who hold the course.

Important Note: Many of the changes made after a course has been made available will affect learners who are currently in progress for the course or have already acquired it. As a result, the LMS strongly recommends versioning any courses for which you make significant changes.

The "Course Creation Process" graphic below illustrates the steps in creating and editing a course. The numbers are keyed to the task descriptions that follow the graphic.



To create the course template:

1. Select **Catalog** in the **Go to:** Drop-Down list.
2. Click **Courses** on the menu and click the **Create** link in the Left Navigation Bar to display the Course Details form that you use to define a new course.
3. Enter the ***required*** information needed to define the course.

Required Information	Description
Name	Name of the Course
Available From	Date when course will be available; use Calendar Picker tool.
Security Domain	Select a security domain for the course from the pick list in the Security Domain field.

Enter any ***optional*** information for the course:

Optional Information	Description
Version	
Discontinued From	Date when course will no longer be available; use Calendar Picker tool.
Acquire within (days)	Number of days Learner has to complete course.
Valid for (days)	Number of days during which course is valid.
Notify before (days)	Number of days before course when the LMS will notify applicable persons about the start of the course.
Recertification Window (days)	Number of days user has to recertify in the course after it is in-valid.
Recertification Policy	Gives you choices regarding your recertification policy.
Immediately Expire	
Abstract	Free form text to add an abstract for the course.
Custom Fields	Enter information in any custom fields that have been defined.

The custom fields currently available for your use are: Course Number, POI_ID, School Code, Foreign Disclosure Code, and Phase.

- Create at least one phase for the course. You can mark phases for re-certification and delete versions after you have created them. (See steps to create phases in "Create Phases" paragraph above.)
- Create at least one module for the phase. (See steps to create a module in "Create a Module" paragraph above.)
- Specify one or more learning items for the module. Save the course. This creates it and causes the sidebar menu links to appear.

Edit Course Templates

After you have created the course, you may edit the specified attributes or add additional information. To edit the course template:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Courses** tab and click the **Search** link in the Left Navigation Bar.
3. Enter the **Name Like** search criteria (or leave blank to search for all courses) and press Go.

4. Find the desired course you wish to edit in the **Search Results** window and click the corresponding Edit icon.
5. You can edit the information on the Course Details page by using the **Change** drop-down list above the main page information.
6. You can edit additional information (e.g., attachments, prerequisites) using the Left Navigation Bar links. See the links below for more information about that.

Using the **Edit** links in the Left Navigation Bar links, if necessary, to finish modifying the template. Their descriptions are shown in the table below.

Page	Description
Internalization	This capability is not used in the current System Release.
Notes	This allows you to add notes about the course. Accessing Notes (See TAB 124.)
Prerequisites	This allows you to assign prerequisites to a course. This would disallow any user from requesting the course if they did not meet the prerequisites.
Roles	This allows you to assign roles to a course. Add roles to course
Audit Trail	This allows you to view the changes made to the course. Viewing Audit Trails (See TAB 13.)
Course Iterations	This allows you to edit the course iterations for the course. Create and Edit Course Iterations (See TAB 125.)
Attachments	This allows you to add attachments to the course. Attachments (See TAB 11.)

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Schedule and Edit Course Iterations

Schedule Course Iterations

A **Course Iteration** is a scheduled course template, which has a start and end date. Scheduling course iterations includes choosing catalog items, under which the course iteration is being offered, the date it is available, whether it is available for users.

Course iterations can be added in the **Catalog** module. To schedule a course iteration in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Course Iteration** tab and click the **Create** link in the Left Navigation Bar to display the Course Iteration Details page for creating a course iteration.

3. Enter the ***required*** information for creating the course iteration:

Required Information	Description	
Product Group	Use the Finder icon to find and select a product group for the course iteration.	
Part Number	Enter a part number for the course iteration. You must enter an alphanumeric string that uniquely identifies the course iteration. Part number can be used to search for and order the course iteration. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. **Note:** If the prefix appears, do ***not*** delete or change the prefix. The system requires product group prefixes to be included in all part numbers.	
Name	Enter a name for the course iteration.	
Security Domain	Use the Finder to find and select a security domain.	Use the l security
Available From	Use the Calendar to select the first day the course iteration will be available.	

4. Enter any ***optional*** information for the course iteration:

Optional Information	Description
Description	Enter a description for the course iteration.
Marketing Campaign	
Discontinued From	Use the Calendar to select the last day the course iteration will be available.
Total Price	(Display only)
Number Items	(Display only) This field displays the number of items in the course iteration and is blank until you define items for the course iteration.
Training Units	

Internal	Select this check box to designate the course iteration as orderable for employees.
External	Select this check box to designate the course iteration as orderable for clients (external learners).
Display for Web	Select this check box to display the course iteration in the Product Catalog for learners, managers, and group administrators, as well as web registrars.
Display for Call Center	Select this check box to display the course iteration in the Product Catalog for Call Center registrars.

5. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area. Custom fields created are: ATRRS Class ID and Package Type. Enter information in the fields as required/desired.
6. Click the **Course Iteration Lessons** link in either of the right-hand corners of the frame to define items for the course iteration.

   The ***Course Iteration Lessons*** page appears.

   Note: You must define at least one item for a course iteration before you can save the course iteration. In addition, you must specify at least one catalog item as a choice for the course iteration item.

   To add a course iteration item and choices for the item:

   a. Click the **Add New** link.

      The ***Course Iteration Section Details*** page appears.

   b. Enter the following information for the course iteration item:

Optional Information	Description
Description	Enter a description for the course iteration item.
Manager Approval	Select whether a manager's approval is required for the Course Iteration.

   c. In the ***Choices*** area, click the **Add New** link to add a choice for the item.

      The ***Search for Learning Offerings*** pop-up window appears.

   d. Enter a category and, optionally, a product group and click **GO** to return all catalog items that match your search criteria.

Note that if you select `Lesson' as your category, the search only returns classes that have a start date within the effective dates (Available From and Discontinued From) for the course iteration.

e. Select one or more of the catalog items in the list by selecting the check boxes next to their titles, then click **Done** to close the pop-up window and add your selections to the course iteration item.

   You can enter as many choices for the course iteration item as you wish. When the course iteration is ordered, any one of the catalog items in the list of choices for the course iteration item can be selected.

If you are done adding course iteration items and choices, click **Save** (this link only appears when at least one course iteration item with one choice has been added to the course iteration)

However, you should make sure that you do not want to add more items to the course iteration. Once you save (i.e. schedule) the course iteration, a price is calculated for the course iteration based on the number of items in the course iteration and the unit price for each item. This price is then added to the top-level internal and external price lists in the system.

Important: If you wish to add more items, do ***not*** click **Save**. Instead, click the **Back** button to return to the previous page where you can add another course iteration item.

Edit Course Iterations

After you have scheduled the course iteration, you may edit the specified attributes or add additional information. To edit:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Course Iteration tab** and click the **Search** link in the Left Navigation Bar.
3. Enter the search criteria and press Go.
4. Find the desired course iteration and click the Edit icon.
5. You can edit the information on the main page using the drop-down list above the main page information.
6. You can edit additional information (e.g., attachments, prerequisites) using the Left Navigation Bar's links. See the links below for more information about that.

To add or edit the lessons, products, or instructional units associated with this iteration, click the Course Iteration Lessons link in the upper right corner of the Main page. From that page, you have the ability to delete (click the Trash Can icon), edit (click the Edit icon), or add new items (click the Add New button).

After the system schedules the course iteration, links to the following pages are displayed:

Page	For More Information, See:
Audit Trail	TAB 13: Viewing Audit Trails
Internationalization	Functionality Not Used in System Release.
Notes	TAB 124: Accessing Notes
Keywords	TAB 126: Adding Keywords to a Course Iteration
Cancellation Charges	Functionality Not Used in current System Release.
Attachments	TAB 11: Attachments
Roster	Lists Learners in the iteration as well as links to their grades and output codes

View Courses and Products Details

From the Catalog drop-down lists, you have the capability to view the courses and products in the LMS. You would view the details of course and products for a number of reasons, including checking version numbers, lesson schedules, attachments, and other information associated with the course or product. From those views, you have the option to both edit and create new entries.

View Course Detail

To view the details of a course, follow these steps:

1. Select Catalog from the drop-down module list.
2. Select the Courses tab and select the Search option in the Left Navigation Bar.
3. Enter Search Criteria and select Go. This will return the list of courses that match the search criteria.
4. Click the icon in the Edit column. This will display the Course Details window.

Editing Courses

Editing courses includes the same tasks performed when you first created the course. These tasks can be grouped into structure maintenance tasks and information addition tasks.

While viewing the Course Detail, you have the option to add or edit information. Information can be edited on the Main Details Page by selecting an editable field from the drop-down list at the top of the Main Information page. You can add detail by selecting on the desired link in the Left Navigation Bar.

Important: Many of the changes made after a course has been made available will affect learners who are currently in progress for the course or have already acquired it. As a result, the LMS strongly recommends versioning any courses for which you make significant changes.

For more information, see TAB 64: "Managing Courses"

View Product Detail

You view the details of products in the **Catalog** module.

To view the product details in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu and click the **Search** link in the Left Navigation Bar.
3. Enter the search criteria and select GO. This will return a list of products that match your search in the Product Search Results window.
4. Click the icon in the Edit column to display the information for the product.

You can edit the product information at this point. There is a list of fields available for modification in the drop-down list above the Main Information page (NOT the module drop-down in the upper-right corner of the LMS screen). You may also edit information using the Left Navigation Bar's links. Those are listed below:

Page	For More Information, See:
Attachments	TAB 11: Attachments
Associated Content	TAB 45: Viewing Content Associated with Products
Skills	TAB 46: Assigning Skills to a Product
Prerequisites	TAB 47: Specifying Prerequisites for a Product
Equivalents	TAB 48: Specifying Equivalents for a Product
Keywords	TAB 49: Specifying Keywords for a Product
Audit Trail	TAB 13: Viewing Audit Trails
Courses	TAB 50: Viewing Courses Associated with Products
Inventory Location	TAB 51: Assigning Inventory Locations to a Shippable Product
Internationalization	Functionality Not Used in System Release.
Notes	TAB 14: Notes

Insert New Versions

An Army course is a group of catalog items (phases, modules, lessons) that the Learner completes to achieve a learning objective. A new version of a product is created automatically whenever it is changed.

Registration

The Registration functions allow registration for a course or individual product. They also provide the approval process and perform eligibility and prerequisite checks. If maximum registration limits are exceeded, waitlists are established and managed.

- Cancel Learner Registration
- Add Learners to Waitlist
- Remove Learners from Waitlist
- Change Waitlist Priority
- Substitute Learners.

Cancel Learner Registration

As a Course Manager, you might need to cancel registrations of some or all of the learners with reservations in lessons within the courses you manage. This might be performed for a number of reasons. If the learner was unable to make the lesson, you might want to cancel his or her registration to make it available for others, or if all the learners need to be removed for other reasons.

Canceling a registration removes the seat reservation in the lesson as well as the corresponding order line for the registration.

To cancel a registration:

1. To display the ***Roster*** page, select **Lessons** from the **Go-To** drop-down box**.**
2. Click the **Lesson** tab **Go** **Edit** Icon **Roster** sidebar link
3. Click the **Cancel** action icon next to a listed item. A pop-up warning reminds you that this action cannot be reversed.
4. Click **OK** to continue. The cancelled registration is removed from the ***Roster*** page.

Note: Registrations also can be cancelled for an entire course iteration.

Add Learners to Waitlist

If the item requested by a Learner is not available, the LMS adds the Learner to a waitlist with an assigned priority. The LMS provides the capability to move registered Learners to the waitlist of the lesson for which they are registered. You would want to move a registered Learner to the waitlist if you needed to make room another Learner or if you wanted to leave confirmed registrations open for mission-critical or higher priority Learners. You can only perform this action for lessons for which you have access (e.g., you can only move Learners in lessons you are scheduled to teach or manager

As a method of making seats available in a lesson, you may choose to move confirmed registrations to the waitlist.

Once you move a confirmed registration to the waitlist, the seat reserved for the registration becomes available. In addition, seats become available in a lesson when registrations for the lesson are cancelled or the lesson administrator adds seats to the lesson.

To move a registration to the waitlist:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** sidebar link
6. Click the **Waitlist** icon next to a listed item.
7. In the ***Waitlist*** pop-up window, enter a reason for the change.
8. Click the **Save** button. The **Waitlist** icon is replaced by the **Confirm** and **Waitlist Priority** icons in the **Action** column.

Note: Registrations also can be moved to the waitlist in the ***Registrations*** page in the **Lessons** module.

Remove Learners from Waitlist

If an item requested by a Learner is not available, the LMS adds the Learner to a waitlist. If there is an open registration, you may move the Learner from the waitlist to that open seat.

When a seat becomes available in a lesson, you can choose to confirm any waitlisted registration for the lesson. Confirming a waitlisted registration moves it from the waitlist to the available seat and changes the status of the registration from **Open - Waitlisted** to **Open - Normal**.

You can choose a waitlisted registration based by order (i.e., the first waitlisted registration is assigned to the first available seat) or by priority.

To confirm a waitlisted registration:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** sidebar link
6. Click the **Confirm** icon next to a listed item.
7. In the ***Confirm*** pop-up window, enter a reason for the change.
8. Click the **Save** button. The **Confirm** and **Waitlist Priority** icons are replaced by the **Waitlist** icon in the **Action** column.

Note: Registrations also can be confirmed in the ***Registrations*** page in the **Lessons** module. You may cancel the registration request of the Learner, which moves him/her off the roster.

Canceling Learners' Registrations

Canceling a registration removes the seat reservation in the lesson as well as the corresponding order line for the registration.

To cancel a registration:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** sidebar link
6. Click the **Cancel** action icon next to a listed item. A pop-up warning reminds you that this action cannot be reversed.
7. Click **OK** to continue. The cancelled registration is removed from the ***Roster*** page.

Note: Registrations also can be cancelled for an entire course iteration. See TAB 71 "Canceling Registrations for Course Iteration".

Change Waitlist Priority

When a registration is waitlisted, the system automatically assigns a priority of zero (0). You can assign a different value to any waitlisted registration to indicate that the registration has a higher or lower priority. Priority information is for reference only. Lesson administrators can use priority when deciding which waitlisted registrations to confirm as seats become available in the lesson.

If the item requested by a Learner is not available, the LMS adds the Learner to a waitlist with an assigned priority. This priority can be based on a pre-defined number or on a first-come, first-served basis. The LMS does not automatically move Learners from the waitlist to a vacant seat. Therefore, you have the option of adding Learners. If and when seats become available, you have the option to move or re-prioritize waitlisted reservations. You can also substitute confirmed registrations for waitlisted Learners, or cancel registrations.

Note: Priority values are arbitrary; the LMS does not place any restrictions on the priority values you use. You can use any range of values; however, the range should reflect your business practices (e.g. 0 is the highest priority and 99 is the lowest, or vice-versa).

To set a waitlist priority:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab

3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** sidebar link
6. Click the **Set Waitlist Priority** icon next to a listed item.
7. In the ***Set Waitlist Priority*** pop-up window, enter a priority value and a reason for the change.
8. Click the **Save** button. The new priority value will be listed in the **Waitlist Priority** column.

Note: A waitlist priority also can be set in the ***Registrations*** page in the **Lessons** module

Substitute Learners

The LMS allows you to substitute unregistered Learners for registered ones. Performing this action bypasses any manager approval required for the lesson. This would be used if a waitlist had reached its capacity, so no other Learners could request registrations. In such a case, a Learner could simply be substituted without have to be first put on a waitlist, and then granted an open seat.

If a different learner than the person registered attends a lesson, the registration can be switched from the original person to the new person.

To substitute a registration:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** sidebar link
6. Click the **Substitute Learner** icon next to a listed item.
7. In the ***Substitute Learner*** pop-up window, select a different learner from the organization that was billed for this order.
8. Click the **Save** button. A confirmation window will appear. Click **Close** to dismiss the window. The substituted learner's name will appear in the **Student Name** column.

Note: Registrations also can be substituted in the ***Registrations*** page in the **Registrar** module.

Resource and Event Scheduling

The Resource and Event Scheduling functions allow for the short range scheduling (less than one year) of Instructors, classrooms, equipment and materials; production and distribution of schedules; and changing of schedules. Your functions include the following:

- View Lesson Details (including Schedule)

- Assign Resources
- Designate Qualified Instructors
- Assign Class Managers and Subject Matter Experts
- Assign Learners to Groups, Sub-Groups, and Sections
- View Resource Calendars

View Lesson Details (including Schedule)

When you need to see if resources have been assigned to lessons or other learning events or to edit the names or types of resources already associated with the item, you must first view the lesson details.

Assigning Resources

Managing courses includes assigning resources. In the LMS, resources are defined as the following:

- Employee – Generally an instructor, either military, civilian, or contractor
- Equipment – Items that are not consumed during a lesson, such as an overhead projector, an engine stand, etc.
- Inventory – Items that are consumed during a lesson, such as pencils and notebooks, ammunition, etc.
- Facility – Location where the lesson will take place.

Resources are assigned to courses by creating templates. All learning items created by using the template inherit the resources defined in the template. While the resources are inherited, they can be modified. You must add resources at the course level or lesson level. The lesson session template usually contains a built-in suite of generic resources. For example, the template may require an Instructor and a classroom. However, the template will not choose the specific Instructor or reserve a facility. You must add these details.

If the resource is available, the LMS schedules that resource to the course or lesson for the times and dates specified. If any of the resources scheduled need to be shipped, then the LMS enters the necessary information for product distribution. Once the resource has been scheduled, the LMS decreases the quantity of inventory and equipment and the availability of Instructors and classrooms. Once you have assigned a resource to a lesson, no other lesson can use it.

If the resource is not available, then the LMS informs you there is a problem. The cause could be one of several possibilities:

- The resource quantity is exhausted.
- The resource has already been allocated to another course.
- The resources for this lesson exceed the quantity reserved for the course.

Resources assigned to a lesson template will be inherited by lessons created from that template.

Assigning Resources to Lesson Templates

Resources can be assigned at two levels: lesson template and lesson iteration.

To assign a resource type for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list
2. Click **Lesson Template** on the menu.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click **Resources** in the sidebar to display the ***Resources*** page.
5. Select a resource type from the Add New Resource Type drop-down list.
6. Input the purpose and choose a Resource Subtype.
7. Select a name using the Finder. The remaining fields will be populated by information linked to the specific resource selected.
8. Click **Save** to assign the resource.

This resource will be inherited by all the lesson iterations scheduled based on this template.

Assigning Resources to Lesson Iterations

To assign a resource to a lesson iteration in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list
2. Click **Lesson** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create a new iterations or find an existing one.
4. Click **Resources** in the sidebar to display the ***Resources*** page.
5. Select a resource type from the drop-down list to display the ***Add a Resource:*** page.
6. Enter required information:

Required Information	Description
Purpose	Select a purpose using the drop-down list.
Resource Subtype	Select a subtype using the drop-down list.

7. Select the picker tool next to the Name box to find the resource you desire.
8. Enter the search information and select GO to return a list of possible resources. Note: if you are searching for "employees," you can select the check box for "Qualify for Lesson" to return only those Instructors, SMEs, etc who are qualified to association with the lesson.
9. Click "+" next to the resource you want; this will automatically populate additional fields in the Resources page.

To delete the resource simply click the trash can icon in the same row as the resource.

Designate Qualified Instructors

Any user in the LMS who has been designated as a resource is eligible to teach lessons. However, you will want to designate certain users as “qualified instructors” for lessons in specific courses.

Designating an User as a Qualified Instructor

All users designated as resources in the LMS are eligible to teach lessons; however, you can designate a user as "qualified" to teach lessons for specific courses.

Designating users as qualified instructors (for courses) enables class administrators, when searching for users to serve as instructors for a lesson, to limit their search to users who are qualified instructors for the course.

To designate a user as a qualified instructor for one or more lessons using either the ***People*** or ***Resources*** module in the LMS:

1. Click the **User** tab and search for users.
2. In the search results, click the **Edit** icon for the user. The ***User Details*** page appears.
3. Click the **Instructor Qualifications** link in the left navigation bar to display the ***Instructor Qualifications*** page appears.
4. Use the search fields at the bottom of the page to find the lesson template.
5. In the search results, click the + icon next to the name of the lesson template to add that to the list the user is qualified to teach.

Note: Each lesson iteration created using the lesson template will inherit the ability to assign the instructor as a qualified one.

Working with Subject Matter Experts (SMEs)

Assigning Class Mangers and Subject Matter Experts

As a Course Manager, you might want to assign Class Managers to monitor and manager the operations of lessons and the Learners within those lessons. You might also want to assign SMEs to provide expert guidance to Learner within a lesson or about a particular subject. CMs and SMEs are assigned to lessons in the same manner as Instructors are assigned. If the individual who you want to designate as a CM or SME is already one, then follow the link to Assign CM/SME. If they are not already a CM or SME, you must first appoint them to be one. Therefore, follow the first link for Appoint CM/SME.

To appoint a CM or SME in the LMS:

1. Select **People** in the **Go to:** drop-down list
2. Click the User tab and **search** to find the individual you would like to designate as a CM or SME. Once located, click the Edit icon to display their information.
3. Click **Security Roles** in the sidebar and select Add under the New Security Role section.

4. This will display the list of security roles. Select the appropriate Class Manager or Subject Matter Expert role for the individual. This will add it to the window above.

Once an individual has been given CM or SME security roles, they can perform the functions of a CM or SME. Next, you need to assign them as CM's and SME's for lesson templates or specific lessons.

Assigning Class Managers and Subject Matter Experts to Lesson Templates

Resources can be assigned at two levels: lesson template and lesson iteration.

To assign a resource type for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list
2. Click **Lesson Template** on the menu.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click **Resources** in the sidebar to display the ***Resources*** page.
5. Select Employee as the resource type in the Add New Resource Type drop-down list.
6. Input the purpose and choose Class Manager or SME as the Resource Subtype.
7. Select a name using the Finder. The remaining fields will be populated by information linked to the specific resource selected.
8. Click **Save** to assign the resource.

This resource will be inherited by all the lessons based on this template.

Assigning Class Managers and Subject Matter Experts to a Lesson

To assign a CM or SME to a lesson in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list
2. Click **Lesson** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create or find a lesson.
4. Click **Resources** in the sidebar to display the ***Resources Manager*** page.
5. Select Employee as the resource type from the drop-down list to display Add a New Resource Type.
6. Enter required information:

Required Information	Description
Purpose	Select a purpose using the drop-down list.
Resource Subtype	Choose Class Manager or SME

7. Enter optional information:

Optional Information	Description

Name	Select a name using the picker tool.
Rate Template	Select a subtype using the drop-down list.
Resource Rate Type	Accept the default or select a rate type from the drop-down list.
Resource Rate	The rate defaults from the rate type.
Required Quantity	Accept the default or enter a new number.

Assigning Resources to Instructors

The LMS allows you to assign specific resources to Instructors of lessons. Assigning resources to specific Instructors increases the accountability of resource management and facilitates tracking lost or missing resources.

For lessons, the LMS allows you to assign resources to the Instructors responsible for delivering learning. This facilitates the tracking of equipment and other resources provided for particular training activities, and provides for better accountability.

1. Select Lessons from the Go-to: Drop-down list.
2. Click the Lessons tab (this should be the default)
3. Search for the Lesson and click the Edit icon to display the details of the lesson.
4. Click the Resources link in the Left Navigation Bar. This will display the resources assigned to the lesson.
5. In the Action column, select the Add icon, which has a plus sign and the words "add" next to it. The LMS will allow you to assign resources to any human resource. This will launch another window that lists all the resources assigned to the lesson as well as any already assigned to the instructor.
6. To add a resource, select the resource type from the drop-down list and click GO. This will list all resources assigned to the lesson that are of that type.
7. Click the check mark icon under the Assign column to assign the resource to the Learner. This will automatically decrement from the available resources from assignment, thus preventing you from double assigning the same resource twice.
8. The assignment has been automatically saved, so you only need to "X" out of the screen.
9. To view or delete the assigned resource, click the "View Resources Assigned to Users" link under the roster. Deleting the assignment will automatically put the resource back in the pool of assignable resources.

Assigning Resources to Learners

For lessons, the LMS allows you to assign resources to specific Learners. This facilitates the tracking of equipment and other resources provided to Learners in a particular lesson, and provides for better accountability.

To assign resources to Learner, follow these steps:

1. Select Lessons from the Go-to: Drop-down list.
2. Click the Lessons tab (this should be the default)
3. Search for the Lesson and click the Edit icon to display the details of the lesson.
4. Click the Roster link in the Left Navigation Bar. This will display the roster for the lesson.
5. In the Action column, select the Add icon, which has a plus sign and the words "add" next to it. The LMS will allow you to assign resources to any Learner who Open-Normal Registration status. This will launch another window that lists all the resources assigned to the lesson as well as any already assigned to the Learner.
6. To add a resource, select the resource type from the drop-down list and click GO. This will list all resources assigned to the lesson that are of that type.
7. Click the check mark icon under the Assign column to assign the resource to the Learner. This will automatically decrement from the available resources from assignment, thus preventing you from double assigning the same resource twice.
8. The assignment has been automatically saved, so you only need to "X" out of the screen.
9. To view or delete the assigned resource, click the "View Resources Assigned to Users" link under the roster. Deleting the assignment will automatically put the resource back in the pool of assignable resources.

Assign Learners to Groups, Sub-Groups, and Sections

Assign Learners to Groups

The LMS allows managers of the course iterations to assign learners to groups within course iterations. The hierarchy is as follows: groups, sub-groups, and sections. Learners are assigned at the section level, and there can be multiple sections within a subgroup. Furthermore, sections can be assigned to specific lessons within the course iterations. Learners can register for course iterations, but do not necessarily have to register for each item in the iteration. This functionality gives the iteration manager the ability to group learners and manage the lessons (including start dates and locations) that they complete.

Creating Hierarchy

Follow these steps to create the group hierarchy:

1. Select the **Catalog** module from the **GO-TO** drop-down menu.
2. Click the **Course Iteration** menu tab.
3. Enter Search criteria to find the desired course iteration, and select "View Groups" link. This will display the course iteration groups, sub-groups, and sections already created. By default, the LMS creates a default groups, sub-group, and section where all learners are grouped until moved.
4. Click **Add/Modify Groups** to create a new group, sub-group, or sections. If you wish to add a sub-group or section to an existing group or subgroup, you also click this link. The LMS will allow you to select the appropriate radio button for adding a new group, subgroup, or section.

5. Once you have created a section, an icon will appear next to the section. Click this icon to add learners to that section.

Assigning Learners

After you have created sections, an icon will appear next to that section that will allow you to assign learners to that section. When you select the icon, the LMS will display a page listing all of the registered, unassigned learners in the left column and the learners assigned to the section in the right. Selecting the radio button next to the learners in either column will move them to the other. For example, if John Doe is a registered learner who is not assigned to the section you have chosen to detail, he will appear in the left column, title "Unassigned Learners." If you wish to assigned him to that section, simply select the radio button next to his name and the LMS will dynamically move him into that group.

Assigning Lessons to Sections

Before you can assign sections of learners to lessons, you must have already created groups, sub-groups, and sections. Follow this path to assign lessons within the course iteration to sections of learners:

1. Select the **Catalog** module from the **GO-TO** drop-down menu
2. Click the **Course Iteration** menu tab.
3. Enter Search criteria to find the desired course iteration, and select "View Lessons" link. This will display a list of lessons within the course iteration.
4. Click the Edit icon of the desired lesson. This will display detail about that lesson, including a link to add group sections titled "Register Group(s)". NOTE: the link to add group sections will only be displayed if the lesson start date has not passed and the lesson is an instructor-led lesson.
5. Select "Register Group(s)" to assign sections to the selected lesson. This will display the list of groups that you created when you created groups. From this page you can manage the learners in the groups by clicking the "people" icon (icon that looks like people) or register the section for the lesson.
6. Register the Section by clicking the "Register" icon. This registers all the learners of that section for the lesson.

Accessing the Resource Calendars

Every resource has a calendar so you know the times the resource will be needed and the locations where it will be deployed. You can view the calendar by month, by workweek (Monday through Friday) or by day. Additionally, if you want to view the schedule for a resource in another time zone, you can change your system time zone to another.

Resource Calendars (for Scheduled Resources)

Each facility, location, and equipment item (i.e. resource whose time can be scheduled/reserved) has a calendar that can be used to schedule the times it will be needed and locations where it will

be deployed. Within the resource calendars, you can also schedule events. You would want to schedule an event if the resource was going to be unavailable for use or some other necessary allocation of the resource where it would be unavailable for regular scheduling. These are represented as events.

Training Delivery

The Training Delivery functions provide for the crediting of Learners; delivery of electronic training; monitoring of Learner progress; and post-instruction processing (posting grades and generating completion certificates). These functions allow the Instructors to perform numerous pre- and post-instruction activities. While these are primarily Instructor functions, the LMS provide you will the ability to perform them if necessary. Your functions include:

- View Roster
- Enter Notes
- Record Attendance
- Create Ad Hoc Learning Events
- Enter and Update Grades
- Mark a Lessons Delivered
- Mark a Course Complete
- Mark a Lessons Complete
- Credit Unregistered Learners

Working with Rosters

A roster is a list of all the students who have registered for a lesson. The roster can be viewed from the ***Roster*** page, and several roster management tasks can be performed from here, as well. The LMS creates a roster for every lesson and course iteration in the Catalog. This roster is available for both active lessons and those that have already occurred. Viewing rosters is a critical action necessary to perform important functions associated with training delivery. While viewing the roster, you also have the ability to perform the following crucial functions:

- Add notes
- View a Learner's personal information
- Perform waitlist actions
- Cancel registered Learners
- Substitute Learners
- View registration details.

Note: these functions are <u>only available at the individual lesson level</u> and not at the course iteration level.

Viewing the Roster

To view the roster for a lesson, follow these steps:

1. Choose Lessons from the drop-down list in the upper right corner of the LMS.

2. Select Search on the Lesson tab and enter the appropriate search criteria and click Go.
3. Click the Edit icon next to the desired lesson. This will display the Lesson Details page.
4. In the Left Navigation Bar, click the Roster link. This will display the roster.

To view the roster for a course iteration, follow these steps:

1. Choose Catalog from the drop-down list in the upper right corner of the LMS.
2. Select Search on the Course Iteration tab and enter the appropriate search criteria and click Go.
3. Click the Edit icon next to the desired course iteration. This will display the Course Iteration Details page.
4. In the Left Navigation Bar, click the Roster link. This will display the roster.

Adding Notes

You can add notes to any Learner on the roster for any lesson you can access. You can also add notes for the entire class. These notes are free text fields and remain after the lesson has been delivered. Entering notes is a useful function for recording information about a learner or the class. Such information might include documenting a reason for missed training.

Notes can be added to any lesson. One use of notes might be to document extenuating circumstances. These notes can be viewed by course managers, class managers, and instructors while the lesson is being taught, or after it has been delivered.

To add notes to a registration:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** sidebar link
6. Click the **Registration Notes** icon next to a listed item.
7. In the ***Registration Notes*** page, either search for an existing note or create a new note by clicking the **Add New** link.
8. In the ***Add New*** page, select a category from the drop-down list and write the note in the text box.
9. Click **Save**.

Note: Notes also can be added in the ***Registrations*** page in the Lessons module

Record Attendance

Recording attendance is a critical process for granting learners credit for attending training sessions. The LMS tracks attendance on a lesson-by-lesson basis. If the lesson spans multiple days, an attendance list for each day is provided. While recording attendance, you also have the capability to mark a lesson as delivered or canceled, which will update the Learners' transcripts.

Both a Course Manager and Class Manager can mark attendance for a learner, using the ***Lessons*** module of the LMS. Attendance can also be marked by an instructor in the ***Instruction*** module.

To record attendance for a learner or a lesson in the LMS:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** sidebar link
6. Click the **Lesson Attendance** link
7. For each session, select either the **Mark All** check box for the entire lesson or check boxes for individual learners.
8. Click **Save**.

Create Ad Hoc Learning Events

Ad hoc learning events represent training sessions that were not scheduled before the training took place. This function provides the following benefits:

- Ad hoc events need not be scheduled (or resources assigned) prior to the event taking place.
- The learners who receive credit for the completed event do not need to request it.

Ad hoc events have the additional benefit of automatically being added to the Training Catalog. Initially, they are not available for registration, but once in the Catalog, their status can be changed to make them available for future scheduling and registration.
You do not need to assign resources, register Learners, or even provide grades. But you do need to mark attendance, delivery, and completion. Ad hoc events are useful for recording training for Learner's that are not events in the Training Catalog.

Certain users can record ad hoc learning for learning not defined in the LMS using the **New Ad Hoc Event** button. This may also be used to record informal learning.

Note: This procedure creates a new course in the catalog, which is why some of the displayed fields prompt you for course-related information; however, by default, the course is not enabled for viewing/ordering in the catalog. Catalog administrators can always choose, if they wish, to enable the course.

In addition, the event appears in the Learner's **Transcript** page as a completed lesson for the course created by the procedure. To record ad hoc learning in the LMS for one or more learners

using a new ad hoc event, perform the Select Learners task, described in the following paragraphs. This task is identical to recording ad hoc learning using an existing learning resource. For more information, see TAB 129, “Select Learners for Ad Hoc Learning".

Enter Information for the New Event

After selecting learners for the ad hoc event, enter the information required to create the event:

1. Click **New Ad Hoc Event**. The ***Create New Ad Hoc Event*** page appears.
2. In this page, enter the following information:

Fields	Description
Title	Enter an appropriate title for the new event. For example, "Java Basics".
Course Number	Enter a number or string that uniquely identifies this event (i.e. course). For example, "JB001".
Available From	Select the date from which this ad hoc learning will be available in the field.
Language	Select the appropriate language for the event. For example, "English" if this event is in English.
Description	Enter an appropriate description.
Group	Select the appropriate catalog group to which this learning would belong. For example, "Programming/Development".
Duration	Enter the appropriate duration for this event.

3. Click **Next**. The ***Ad Hoc Scoring*** page appears.

Recording Grades and Other Credits

Enter Learner/Event Information

This task is identical to recording ad hoc learning using an existing learning resource.

For more information, see TAB 129, “Enter Learner Completion and Event Information".

Enter and Update Grades

You can verify and enter test results into the LMS. If the test materials are non-electronic (e.g., paper-based), you must determine the results by using test answer keys, reading essays, running

Scantron forms, or evaluating peer collaboration. If the test materials are electronic (e.g., online), the LMS automates the grading function. Many times, tests may be a combination of electronic grading and manual grading (e.g., a multiple choice test with an essay portion). In such cases of composite test media, you must manually enter the grade for the non-electronic portions of the test.

- When a course and its testing are self-paced and tests are mailed back for grading and evaluation, you can record in the LMS the dates that the material was received, graded, and recorded. Test results are posted to the Learner's individual training record.

Test results can contain various levels of detail including:

- Pass/fail
- Percentage correct
- Alpha-numeric scores
- Specific questions marked incorrect.

Future access to this information varies by rank, unit, role, and other types of access permissions.

To record a grade for a learner in the LMS:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** sidebar link
6. Click the **Grade Entire Lesson** link to display the ***Grade Lesson*** page.
7. Enter a value in the **Lesson Grade** field for the entire lesson or for any individual learner. If you enter a grade in the row for "Entire Class," you must click the down arrow next to the field to give it to all the learners.
8. Click **Save**.

Updating grades can be done up until the point that the lesson is "Marked Delivered".

If the lesson is associated with a course, the LMS will "roll-up" the grades from the individual lessons. From the **Course Iterations** tab in the Catalog module, the user can view the all the lessons and grades for individual learners, as well as a collection score for the course.

Crediting Unregistered Learners

In a typical Army course, there are two dates: the date to report to the course and the start date. Some unregistered Learners may show up for the course on or before the start date. On the report date, you need to determine which Learners have reservations for the ATRRS-managed course, and which Learners are "walk-ins." If any Learners have not already registered for the course, you need to register them by logging into ATRRS to post the Learner as a walk-in. When the walk-in is approved, ATRRS sends the reservation for the course to the LMS using the same process as for other reservations made in the LMS.

On the Roster page, you can credit Learners for lessons not managed in the LMS. For non-quota-managed courses, you can use this function to credit a Learner who attends only part of a course or who attends the course but cannot register because the course has already begun.

A lesson administrator can select learners for which they want to give credit for a lesson, although the learners have not registered for the lesson. Giving credit for a lesson does not create a registration, but the lesson is listed on the learner's transcript like a lesson completed in the normal way.

To credit an unregistered learner:

1. Click **Lessons** in the **Go-To** drop-down menu
2. Click the **Lesson** tab
3. Click **Go** in the Left Navigation Bar
4. Click the **Edit** icon that corresponds to the lesson you want to modify.
5. Click the **Roster** sidebar link
6. Click the **Credit Unregistered Learner** link.
7. Click the **Search for Learners** link to display a pop-up window.
8. Enter search criteria in the fields and click **Go** to list learners.
9. Select the check box next to one or more learner names and click the **Add** button at the bottom of the page. A confirmation message will appear to indicate the lesson credit was successfully recorded in the learner's transcript.

Cancel Lesson

The LMS supports canceling scheduled lessons and registrations for lessons. You can cancel a lesson at any time before the lesson is marked delivered. Canceling a lesson cancels all the registrations for the lesson. You would want to cancel a lesson if resources were not available, the minimum number of learners was not met, or other conflicts. Instructors also have the ability to cancel lessons.

Lessons can be cancelled by a provider any time before the lessons are marked delivered. Canceling a lesson cancels all the registrations for the lesson, as well as all the order lines for which lessons were requested. When a lesson is cancelled by a provider, no charges are incurred against the learners registered for the lesson.

Note: Instructors can also cancel a lesson through the **Roster** link.

To cancel a lesson in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list
2. Click **Lesson** on the menu to display the **Search** and **Create** links in the Left Navigation Bar.
3. Click **Search** to find an existing course that you can edit.
4. Click **Main** in the sidebar to display the ***Main Lesson Information*** page.

5. Select **Cancel Lesson** from the **Change:** drop-down list at the top of the page.
6. Enter a reason for the cancellation in the pop-up window.
7. Click **Save**. The cancellation date will be entered into the **Date Cancelled** field.

Warning: This action cannot be undone.

Collaboration

The Collaboration functions allow Learners and other roles to participate in chat sessions, threaded discussions, and community groups. As a Course Manager, you also have a number of administrative functions.

Your functions include:

- Create Communities
- Manage Communities
  - Search for Communities
  - Add Experts to Communities
  - Add Attachments to Communities
  - Add Notes to Communities
  - Create Community Association
  - Monitor Discussion Threads.

Creating Communities in the LMS

A community is a place in the LMS where a group of peers can store attachments, link to URLs, and access experts for information. Communities also contain discussion thread and chat capabilities. You can create a new community and appoint the community administrator(s) or do it yourself. You can also appoint experts or allow any user to appoint themselves an expert.

For all items in the Training Catalog, the LMS automatically creates chat and discussion threads.

Collaboration administrators can create communities in the system, define community administrators, and make community associations, as well as add attachments and notes to a community.

To create a community:

1. From the **Go to** drop-down list, select the **Communities** module.
2. Click the **Community** tab.
3. Click the **Create** link. The ***Community Details*** page appears.
4. In the **Name** filed, enter a name for the community.
5. Click the icon next to the **Security Domain** field to display the ***Domain Finder*** window. To search for a security domain:
   a. In the **Domain Name Like** text field, enter search criteria.
   b. Click **Find**. A list of security domains matching the search criteria appears in the search results area. Note: If no search criteria are specified, a list of all security domains in the system is returned in the search results.

   c. Click the **Select** icon next to the security domain you want to use.

6. Select the **Enable** check box to specify if the community is available to learners.
7. Click the icon next to the **Community Administrator** filed to search for a user, who you want to appoint as a community administrator. By default, the ***Search for Internal People*** window appears. You can use the ***Search for Internal People*** window to search for LMS users.

To search for a user:

   a. Specify search criteria. You can search by **First Name**, **Last Name**, **User Name**, **Business Unit**, and **Location**. Note: If no search criteria are specified, a list of all internal/external users in the system is returned in the search results.
   b. Click the **Select** icon to select the user, you want to appoint as a community administrator.
   c. Click **Go**.

8. Select the check box which specifies whether users can add themselves to the community as experts.

   If the check box is not selected, only Collaboration administrators can add users as experts for the community.

9. Select the check box which specifies whether users can add attachments to the community.

   If the check box is not selected, only Collaboration administrators can add attachments to the community.

10. In the **Description** text field, enter a description for the community.
11. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area. Enter information in the fields as required/desired.
12. Click **Save**.

Once a community is created, you can perform the following tasks for the community.

Task	For More Information, See:
Add / delete community experts.	TAB 77: "Adding/Deleting Community Experts"
Set community associations.	TAB 78: "Creating Community Associations"
Add attachments to a community.	TAB 79: "Adding Attachments to Communities"
Add notes to a community.	TAB 80: "Adding Notes to Communities"

Once communities have been created, either by you or the LMS, there are number of functions used for monitoring those communities. These functions include searching and editing those communities. Once you have located the community, you can add subject matter experts, attachments, and notes to it.

Searching for Communities

To search for a community:

1. From the **Go to** drop-down list select the **Communities module**.
2. Click the **Community** tab. The ***Community Detail*** page appears.
3. In the search box enter a name for the community. Note: If no name is specified, a list of all communities in the system is returned in the search results.
4. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria.

The ***Search Results*** page allows you to:

- Edit a community. (For more information, see TAB 83: "Editing Communities".)
- Permanently delete a community from the system by clicking the **Delete** icon.

Once you click the **Edit** icon for a community, the ***Community Detail*** page appears. In this page you can perform the following tasks:

Task	For More Information, See:
Adding or deleting community experts.	TAB 77: "Adding/Deleting Community Experts"
Creating association for a community.	TAB 78: "Creating Community Associations"
Adding attachments for a community.	TAB 79: "Adding Attachments to Communities"
Adding notes for a community.	TAB 80: "Adding Notes to Communities"

Adding/Deleting Community Experts

To add/delete an expert

1. From the **Go to** drop-down list select the **Communities module**.
2. Click the **Community** tab. The ***Community Detail*** page appears.
3. In the search box enter a name for the community.'
4. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert. Note: If no name is specified, a list of all communities in the system is returned in the search results.
5. In the Left Navigation Bar, click the **Experts** link. The ***Experts*** page appears, displaying a list of all the experts in the community.

Adding Experts

To add an expert:

1. In the **Select a Category** drop-down list:
2. Select **Employee** to search for a user. (Selecting "Client" will not return any results)
3. Click **Find**. The ***Employee Finder*** section appears.
4. Enter search criteria. You can search by one or more of the following parameters: **Username**, **First Name**, **Last Name**, **Business Unit**, **Social Security No.**, **MOS**, and **Location**. Note: If no search criteria are specified, a list of all internal/external users is returned in the search results.
5. Click **Find**. A list of all users matching the search criteria appears.
6. Select check boxes next to the users you wish to nominate as experts for the community.
7. Click **Done** to add the selected users as experts for the community.

Deleting an Expert

To delete an expert, click the **Delete** icon next to the community expert you wish to delete. Once deleted from the list of experts, a learner is no longer an expert for the community.

Adding Attachments and Notes to Communities

As a Collaboration administrator, you can add two types of attachments to communities: files and Web pages.

From the **Go to** drop-down list select the **Communities module**.

1. Click the **Community** tab. The ***Community Detail*** page appears.
2. In the search box enter a name for the community.'
3. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert. Note: If no name is specified, a list of all communities in the system is returned in the search results.

Adding Attachments to Communities

1. In the Left Navigation Bar, click the **Attachments** link. The following two sections appear:
   - Attachment List, displaying a list of all attachments in a community.
   - New Attachment, which allows adding new attachments to a community.
2. In the New Attachment section:
   - In the **Name** text field, enter a name for the attachment.
   - From the **Category** drop-down list select a category.

- From the **Language** drop-down list select a language.
- Select the **Private** check box if you want to make the attachment unavailable for other learners.

3. Select one of the following check boxes:
   - **Enter URL**, if your attachment is a Web page.
   - **Upload file**, if your attachment is a file.
   - Enter a URL for a Web page or path for a file.
4. Click **Add to List**.

Adding Notes to Communities

Notes allow Collaboration administrators to share information and comments about communities. Notes are available only for Collaboration administrators.

You can search for notes created in the system, as well as create your own notes for a community.

From the **Go to** drop-down list select the **Communities module**.

1. Click the **Community** tab. The ***Community Detail*** page appears.
2. In the search box enter a name for the community.'
3. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert. Note: If no name is specified, a list of all communities in the system is returned in the search results.

Searching for Notes

To search for notes:

1. In the Left Navigation Bar click the **Notes** link. The ***Community Notes*** page appears.
2. Enter search criteria and click **Go**.

Creating Notes

To create notes:

1. In the Community Notes page, click the **Add New** link to display the ***Add Notes*** page.
2. Add notes and click **Save**.

You can also associate the community with a role, MOS/Career Field, Skill, or Course. This is just another way to link similar learners together in one community.

Creating Community Associations

A community can be focused on one or more of the following object types:

- Role

- MOS/Career Field
- Skill
- Course

Note: If no name is specified, a list of all communities in the system is returned in the search results.

As a Collaboration administrator, you can specify on what objects a community is focused by creating associations. These associations appear in the ***Communities of Practice*** page for learners.

To create an association:

1. From the **Go to** drop-down list select the **Communities module**.
2. Click the **Community** tab. The ***Community Detail*** page appears.
3. In the search box enter a name for the community.'
4. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert. Note: If no name is specified, a list of all communities in the system is returned in the search results.
5. In the Left Navigation Bar click the **Association** link. The ***Association*** page appears, displaying a list of all the associations created for the community.
6. Form the **Select a Category** drop-down list, select an object type: **Internal / External role**, **Internal / External job type**, **Skill**, and **Course**.
7. Click **Find**. The ***<Object_type> Finder*** section appears.
8. Specify search criteria and click **Find**. Note: If no search criteria are specified, a list of all records in the system of the object type is returned in the search results.
9. Select check boxes next to the objects with which you wish to create an association.
10. Click **Done**.

You can also monitor the discussion threads of the community. This is useful for determining if appropriate content is being discussed and posted in the community.

Monitoring Discussion Threads

Monitoring discussion threads involves viewing the discussion threads and potentially removing Learners from the community.

View Discussion Threads

1. Select My Home from the Go-to: module list and select the Communities tab.
2. Select Personal Communities for those you created and monitor or Communities of Practice for additional communities you may monitor related to courses, MOSs, skills, or roles.

3. Click on the name of the community you with to view the discussion threads of and select Discussion Board in the row of Community Actions.
4. This will contain the topic list, from which you may click the titles to view the contents of each topic.

Remove Learners

1. Select My Home from the Go-to: module list and select the Communities tab.
2. Select Personal Communities for those you created and monitor or Communities of Practice for additional communities you may monitor related to courses, MOSs, skills, or roles.
3. Click on the name of the community and scroll down to Community Interested Learners.
4. Click the Trash Can icon next to the Learners you would like to remove from the community.

Evaluation

The Evaluation functions include creating, delivering, and recording critiques and providing for review of products and courses. Your functions include creating critiques and viewing Critique Results. How to perform these functions are described in the paragraphs below.

Creating Critiques

Through critiques you can request feedback from Learners on the quality and content of instructional activities. Critiques are used to assess the educational delivery processes and materials. For example, a lesson critique can be used to obtain feedback about the quality of instruction, course materials, facilities, and equipment. A critique might be required to complete a collaborative session.

Critiques are created using templates; if the critique template does not suit your needs, you have the option to create your own template. The creation of a critique includes selecting the type of critique (product or lesson), selecting the questions, and choosing the respondents.

To create a critique, perform the following tasks:

1. Define the Critique
2. Select Respondents for the Critique

Viewing Results

To view the results for a critique:

1. Select Communities from the Go-to: Drop-down list and select the Critique tab.
2. Search for the name of the critique; click the name of the desired critique.
3. In the ***View Critique*** page, click the **View Results** link in the right-top corner.

The ***View Results by Learner*** page appears displaying all the submitted responses for the critique.

View Critique Results

Once critiques have been created by a Course Manager and completed by Learners, you have the ability to view the results of the critique. You would view the critique results to assess the successes or shortcomings as documented by the critiques.

Training Management

The Training Management function includes functions associated with the administration of the LMS. . Your role allows you to:

- Create Reports
- Creating, Editing, Deleting Content Folders
- Capturing Content
- Find User Roles

Create Reports

The LMS provides pre-defined reports on a wide range of data. You can access data and reports in some or all of the modules found in your drop-down list, with the exception of My Home. Exactly what you will see depends on your role and your security privileges.

Once you select one of the modules in the drop-down, the LMS displays the Reports tab, which lists the available reports for that module. Some reports may be available within multiple modules. For example, "Classroom Instructor Assignments" may appear under "Lessons," "Instruction," and "Resources" since not everyone has access t all three modules.

Once you have located the desired report, select it. Depending on the contents of the report, the LMS may prompt you to enter more information before the report is generated (e.g., the "Roster" report prompts you for the lesson number). After you enter any additional data, the LMS generates and displays that report. From the report displayed on the screen, you can print out the report, export it as a file to your computer, or search the text.

When you request a report from over the web, you must be careful that you get the correct data. If you attempt to run the same report a second time but with new information (e.g., a new lesson number), your browser may call up the first report from the memory cache on your computer. To avoid this, click the Refresh icon on the Reports viewer. The report data will be refreshed according to your new entries.

Running/Viewing System Reports

To run/view a system report in the LMS:

1. Access the LMS.
2. Choose one of the modules from the drop-down list.

The system displays the tabs for the module. If the module supports running reports, a **Reports** tab is displayed.

3. Click the **Reports** tab. A list of the system reports that have been assigned to the current module is displayed. If no system reports have been assigned to the current module, the page does not display any reports.
4. Select the name of the report you wish to run.
5. If required, enter parameter information and click Submit. If no parameter fields appear, simply click Submit.

Note: When running a report over the web, if you attempt to run the same report a second time, your browser might call the report from cache. Click the refresh icon on the reports viewer. The report data is refreshed according to your input.

Creating, Editing, and Deleting Content Folders

This is the first step in getting content into the LMS. Once training content has been developed, tested, and approved, you must create a folder for the content to reside. Once you have complete this step, you may then capturing (or load) the content into the LMS. Below are also links to editing and deleting a created folder.

Creating Content Folders

Folders in the LMS Content folder hierarchy can be nested n-levels deep. A folder can contain any number of subfolders and any number of content objects.

Content objects can be stored inside folders, or they can be stored at the root level of the folder hierarchy.

To create a new folder, follow the steps below:

1. Select Content from the Go-to: module list.
2. Click Create from the sidebar options, enter the necessary and option information, click Save. This will create
3. Click the **Add Folder** link in the main window or click Create Folder from the Left Navigation Bar. Both take you to the same location.

Or, drill down into an existing folder using the folder hierarchy view, and click the **Add new folder** link.

The ***Folder Detail*** page appears.

1. Enter a name for the folder in the **Name** field.
2. In the **Target Folder** field, click the finder icon to see a pick list view of the folder hierarchy, and select the parent folder under which you want the new folder to live.

If you created the folder by clicking the **Add Folder** link on the left-hand sidebar, this field defaults to **Root**.

If you created the folder by drilling down into an existing folder and clicking the **Add new folder** link, this field defaults to the name of the parent folder.

1. Enter a description for the folder in the **Description** field.
2. Click **Save** to create the folder.

Editing Folders

To open an existing folder for viewing/editing, browse to the folder in the folder hierarchy, and click the folder name.

When viewing/editing a folder, you can see its parent folder, all of its subfolders, and all content objects stored inside the folder.

When viewing/editing a folder, you can perform the following actions:

Action	Procedure
Change the folder name	Change the text in the **Name** field, then click **Save**.
Change the folder description	Change the text in the **Description** field, then click **Save**.
Change the folder location	Select a different parent folder using the picker next to the **Target Folder** field, then click **Save**.
Add a new content object	Click the Add new item link.
Create a new subfolder	Click the **Add new subfolder** link.
Edit existing subfolders	Click the **edit** icon next to the subfolder you want to edit.
Edit parent folder	Click the **edit** icon next to the parent folder.
Open a content object	Click the **edit** icon next to the content object you want to open.

Deleting Folders

You can delete folders from the folder hierarchy view by dragging a folder to the trash can icon. Note Folders must be empty before they can be deleted.

Capturing Content

Once you have created content folders, you may add training content to them. The LMS allows you to import content from the following content styles:

- AICC
- SCORM
- IMS
- Universal Learning Format
- Files (and directories of files)
- URLs
- Offline Content (paper-based tests)
- NETg
- SkillSoft.

In order for content to be associated with courses, phases, modules, lessons, and product, they must first be captured (loaded) into the LMS. The following link will provide more information about this, as well as links to the various methods of capturing content.

There are two ways to capture content into the LMS Content repository:

- You can import existing external content.
- You can create new content or questionnaires directly in LMS Content using Content Builder or Questionnaire Builder

To import external content, use the following process:

a. Select the format of the content you want to import.

b. Define metadata for the content object that will be created for the content in the LMS Content repository.

c. Select the import file to upload.

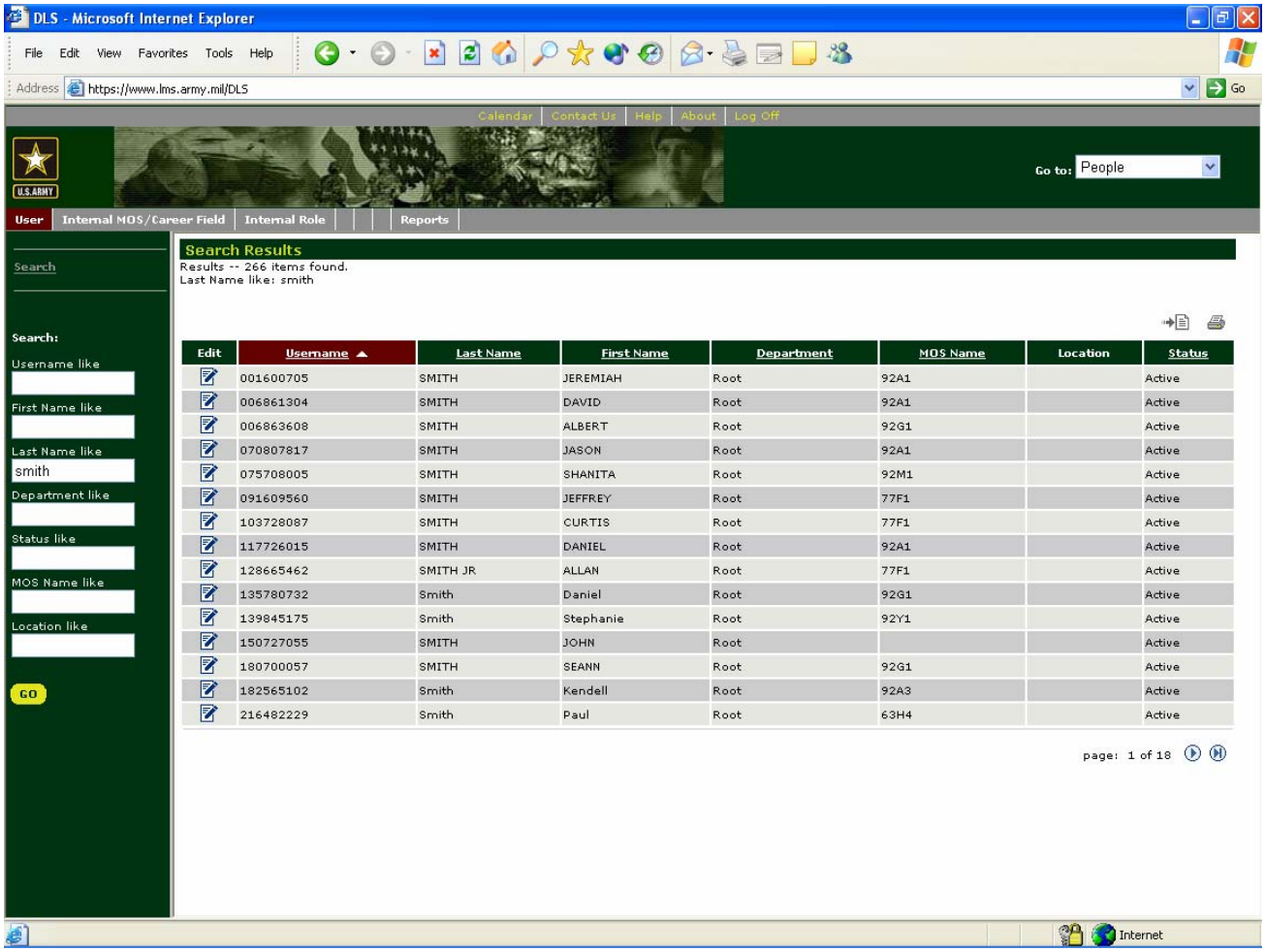
For detailed import instructions, see TAB 133, “Import by Content Format".

- For certain types of external content, LMS Content provides import wizards to simplify the import process. For more information about using the import wizards, see TAB 134, "Using the Import Wizards".

In addition, you can create new content or questionnaires directly in LMS Content using Content Builder or Questionnaire Builder. For more information, see TAB 135, “Creating Internal Content and Questionnaires".

Find User Roles

The LMS allows you to view the roles of other users. To accomplish this, select People from the **Go-to**: Drop-down list. Enter the criteria for the specific user and select **GO**. On the main page, it will have **Primary Role** listed. If the user is associated with other roles, those will be listed in the Security Roles tab in the Left Navigation Bar. Click on the Security Roles list to find any additional roles associated with the user. (No help file)


DLS - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Address https://www.lms.army.mil/DLS
Go
Calendar | Contact Us | Help | About | Log Off
U.S.ARMY
Go to: People
User | Internal MOS/Career Field | Internal Role | Reports
Search
Search:
Username like
First Name like
Last Name like
smith
Department like
Status like
MOS Name like
Location like
GO
Search Results
Results -- 266 items found.
Last Name like: smith
Edit | Username | Last Name | First Name | Department | MOS Name | Location | Status
001600705 | SMITH | JEREMIAH | Root | 92A1 | | Active
006861304 | SMITH | DAVID | Root | 92A1 | | Active
006863608 | SMITH | ALBERT | Root | 92G1 | | Active
070807817 | SMITH | JASON | Root | 92A1 | | Active
075708005 | SMITH | SHANITA | Root | 92M1 | | Active
091609560 | SMITH | JEFFREY | Root | 77F1 | | Active
103728087 | SMITH | CURTIS | Root | 77F1 | | Active
117726015 | SMITH | DANIEL | Root | 92A1 | | Active
128665462 | SMITH JR | ALLAN | Root | 77F1 | | Active
135780732 | Smith | Daniel | Root | 92G1 | | Active
139845175 | Smith | Stephanie | Root | 92Y1 | | Active
150727055 | SMITH | JOHN | Root | | | Active
180700057 | SMITH | SEANN | Root | 92G1 | | Active
182565102 | Smith | Kendell | Root | 92A3 | | Active
216482229 | Smith | Paul | Root | 63H4 | | Active
page: 1 of 18
Internet

LEARNING MANAGEMENT SYSTEM

Appendix A - LMS Roles and Descriptions

LMS Roles and Responsibilities

Role	Role Descriptions
Assistant Instructor (AI)	An individual, military or civilian, who provides support and assistance to a primary Instructor during preparation for or presentation of material to a Learner.
Class Manager (CM)	The individual responsible for managing the conduct of an iteration of a course. The Class Manager's responsibilities include, but are not limited to, such activities as establishing/verifying daily (lesson level) scheduling, authenticating Learners, ensuring resources are available when needed, and ensuring Learners are where they are scheduled to be.
Classroom Manager (CrM)	The individual responsible for ensuring that an assigned classroom/lab/training area at a resident education or training site is ready with the required training products for the presentation of specified lessons. The Learner is assigned a classroom for resident training.
Counselor	An individual responsible for providing advice and guidance to a Learner concerning improvement of current or future performance. The Counselor praises and rewards good performance, develops teamwork, informs Learners on how well they are performing, assists them to reach required standards, causes them to set personal and professional goals, and helps them resolve professional problems.
Course Manager (CoM)	The individual responsible for implementation of Army training through validation of appropriate resources (Instructors, facilities, ammunition, and equipment). This individual verifies Military Occupational Specialty (MOS)/Area of Concentration (AOC) training strategy and all variable course data from resource document submissions for each course. The CoM also identifies and coordinates with Department of Army G3 (DA G3) and Department of Army G1 (DA G1) on constraints to training that may become potential training stoppers. Further, the CoM represents assigned Training and Doctrine Command (TRADOC) schools at the annual Structure and Manning Decision Review (SMDR) at DA G1 to ensure appropriate assignments of training requirements and resources with the Program Management Office (PMO).
Digital Training Facility Manager (DTFM)	The individual responsible for ensuring the distance learning facility is available for Learner use and that the facility provides the required capabilities. Responsibilities include ensuring installed education/training equipment, software, and networks operate as required; a learning station with appropriate courseware is available for scheduled Learner(s); and equipment/software upgrades are installed.
Facilitator	An individual, military or civilian, who makes it easier for a group of Learners to reach a predefined learning objective. The facilitator keeps the group's actions/discussions focused on the function at hand.
Instructor	An individual, military or civilian, who conducts education or training. This instruction may be on-site in the actual presence of Learners; via electronic means such as Video Tele-training (VTT) or web-based education/training; or through assistance to a Learner engaged in a self-paced education/training program.

APPENDIX A – LMS ROLES AND DESCRIPTIONS

Role	Role Descriptions
Learner	An individual engaged in acquiring knowledge and skill by actively participating in a directed or self-motivated education or training programs. The LMS Learner can be: A U.S. Army soldier (Active, Reserve, or National Guard) A Department of Defense (DoD) civilian employee A member of another U.S. military service An employee of a non-DoD government agency, such as a sheriff's office A member of a foreign military service. Learners from the other U.S. military services, from non-DoD government agencies, and from foreign military services must have a special approval to use the LMS.
Learning Approver (LA)	The chain-of-command supervisor who has overall responsibility for the welfare, morale, training, education, and discipline of those under his/her command/direction.
Product Distributor (PD)	The individual responsible for shipping paper-based, CD-ROM-based, and other hard copy products to recipients in response to requests for these products. The request can be triggered by the registration of a Learner in a course or by a request for a product in the Product Catalog. The PD will also be responsible for ensuring that there are always sufficient quantities of these products in stock to meet user requests.
Quota Manager (QM)	The individual designated to manage quotas (seats) in course iterations on a daily basis. This function is usually performed by the Course Manager (CoM) at the Major Army Command (MACOM) level.
Scheduler	An individual responsible for scheduling classroom facilities for each type of lesson. The Scheduler identifies the course, classroom, activity, and start and end times.
Subject Matter Expert (SME)	An individual responsible for providing the technical expertise for the job/duty position. They are function content experts. Army SMEs may be soldiers/civilians in units, Instructors, function performers, and their supervisors. There are three levels of SMEs – apprentice, journeyman, and master.
System Administrator (SA)	An individual responsible for the operation and maintenance of the LMS.
Training Developer (TD)	An individual responsible for translating analysis data into a blueprint for training. This educational/ training development subject matter expert integrates all resource requirements, structure, objectives, test items, training sequence, Learner evaluations, and the program of instruction for resident and non-resident training.
Training Facility Manager (TFM)	The individual responsible for the operation and maintenance of Army education/training facilities. These are the facilities that provide special capabilities required to conduct education/training activities. These facilities include, but are not limited to, ranges, training areas, simulation buildings, and training laboratories/workshops. The TFM is responsible for ensuring the facility is available for Learner use when scheduled, and that the facility provides the required capabilities.
Unit Training Manager (UTM)	The individual responsible for implementing training in an Army unit. This includes management activities such as planning, budgeting, organizing, acquiring training products, and scheduling. This also includes providing evaluation feedback to the training/function proponent concerning the quality and usability of the provided training materials.

LEARNING MANAGEMENT SYSTEM

Appendix B - Glossary

GLOSSARY OF TERMS

Accreditation:
The recognition afforded an educational institution when it has met accepted standards of quality applied by an accepted, professional accreditation agency.

Acquisition:
The process used to acquire goods and services that begins when the need for a product or service is identified and continues until that need is met.

Additional skill Identifier (ASI) or Officer Skill Identifier (SI):
Identification of specialized skills that are closely related to, and are in addition to, those required by military occupational specialty or areas of concentration (officers). Specialized skills administrative systems and subsystems, computer programming, procedures, installation management, identified by the ASI or officer SI include operation and maintenance of specific weapons systems and equipment, analytic methods, animal handling techniques, and other required skills that are too restricted in scope to comprise military occupation specialty or AOC. (See ARs 611-101, 611-112, and 600-200).

Answer Key:
A document that shows the answers to each test question and the test standard for each test.

Army Correspondence Course Program (ACCP):
An overall program supported by AR 350-1. The ACCP is a formal nonresident extension of the TRADOC service schools. It offers individual and group study enrollments in correspondence courses. Based on course eligibility requirements, individuals enroll at their own discretion and determine their own course of study for either correspondence courses or sub-courses. The ACCP offers courses and sub-courses free of charge to the US military Active and Reserve Components, ROTC and military academy cadets, authorized federal civilian employees, and non-US citizens who are employed by the DoD. Correspondence materials are also available for foreign military students through the Foreign Military Sales Program. AC and RC soldiers in grades E4 and E5 can accrue promotion points, and RC soldiers can accrue retirement points through the ACCP.

Army Correspondence Sub-Course:
See "Correspondence sub-Course."

Army Doctrine and Training Digital Library:
The information foundation for AT XXI. Allows trainers, trainees, training developers, and doctrine writers to store and retrieve training products and materials via the internet and personal computers. ADTDL features include an electronic card catalog or pointer (transparent to the users) to doctrinal and training information and products stored in various databases/repositories.

Army Modernization Training (AMT):
Required training to support the Army modernization process. AMT includes New Equipment Training (NET) for new, improved, and cascading materiel systems, Doctrine and Tactics Training (DTT), Sustainment Training (ST), unit modernization, deployment, and proponent training.

Army School:
Institution authorized by Headquarters, Department of the Army to conduct formal Courses for individuals, collective training where required (such as crew training), and training of Army National Guard or U.S. Army Reserve units. To the LMS, any place (Location) that Army training occurs.

APPENDIX B - GLOSSARY

Army Training Help Support Activity (ATHSA):
The tentative name given to describe the multi-lateral organization formed to accept, research, and respond to questions (queries) from within and without the Army about Army training, e.g. topics, procedures, doctrine, or policy. ATHSA is composed of three component entities; Army Training Support Center, Distributed Learning System, and representatives of Proponent Agencies.

Army Training Requirements and Resource System (ATRRS):
The Army training management system. It projects inputs, resource requirements, and student accountability and updates military personnel training records. It provides the data for Congressional Military Manpower Training Reports (MMTR), etc.

Army Training Requirements and Resources System- (ATRRS-) Managed Courses:

Assignment-Oriented Training (AOT):
Training designed to qualify an individual to perform those specific functions associated with the duty position and skill level of the next assignment.

Assistant Instructor (AI):
Individual who supports a primary Instructor for a block of instruction. A Role Player in the LMS with similar permissions to the Instructor Role.

Asynchronous Training:
A training technique that is characterized by the ability to conduct training without the necessity of having Learner and Instructors engaged in the training at the same time. Web-based and correspondence-based DL Courses have this characteristic. Asynchronous training also implies the freedom from having Learners and Instructors geographically co-located.

Audit Trail:
A systemic documentation of decisions made or actions taken. A linear written/printed history of events that comprise the complete record of actions leading to a current status (e.g. for a Course).

Automated Systems Approach to Training (ASAT):
The HQ TRADOC training development automation system under development as a tool for training developers to develop doctrine and training products.

Branch Proponent:

Certification:
Written verification of proficiency in a given task or tasks.

Certified Instructor:
An instructor who received written certification of proficiency by the Instructor Certification Board as meeting all the requirements to instruct in a specific course. Certification normally requires: (1) Training as an instructor (through graduation from a TRADOC-approved Instructor Training Course) and eligibility to hold the instructor identifier, (2) Training in small group instruction for those assigned responsibility to facilitate small group instruction, (3) Demonstrating performance ability in course content (including being MOS/specialty qualified) or being a graduate of the course, (4) Demonstrating teaching or facilitating competence in the course the instructor will conduct.

Checklist:

- Job aid: Used to determine or ensure a process or procedure is followed. The elements of the activity are listed in the execution sequence. A check is usually placed beside each element as it is accomplished.
- Test: A list of actions that identify critical actions that must be performed and that can be objectively observed and measured to determine student performance of the objective to the prescribed standard; the sequence of performance, if any; and an identification of which steps absolutely must be accomplished, if any. The actions are measured in the form of GO or NO GO. This is an absolute measure - the performer either performed or did not perform the action described in the learning objective, met or did not meet the performance criteria.

Class Manager (CM):

Classroom Manager (CrM):

Classroom XXI:

The training environment in which the soldier of the 21st Century will train. This environment is built by leveraging the technology of the information age to gain training efficiencies while maximizing training effectiveness. While successful implementation of Classroom XXI is dependent on the success of all Warriors XXI initiatives, it also requires technological modernization of the training institution.

Class Schedule:
Documentation of start and end dates for one iteration of a course.

Class Size:
The number of students in a class.

Collaboration Community:

Collaboration Session:

Collaboration Support:

Collective Task:
See "Task."

Collective Training:
Training, either in institutions or units, that prepares cohesive teams and units to accomplish their missions in the full continuum of military operations.

Combat Developer:
An individual or agency responsible for developing concepts and organizational and equipment requirements.

Combat Training Center (CTC) Program:
An Army program established to provide realistic joint service and combined arms training in accordance with Army doctrine. It is designed to provide training units opportunities to increase collective proficiency on the most realistic battlefield available during peacetime. The four components of the CTC Program are --

- The National Training Center
- The Combat Maneuver Training Center

- The Joint Readiness Training Center
- The Battle Command Training Program

Command Directed Training:

Common Core Training:
Directed training requirements for specific courses, grade/skill levels, or organizational levels. It consists of tasks performed by individuals at specific grade levels, regardless of military occupational specialty (MOS) or career field. Common core includes primarily organizational level tasks and may include some common soldier and common skill level tasks. The result is soldiers, leaders, and civilians who are prepared to perform new and more complex leadership related duties in operational units and organizations.

Common Skill Level Task:
See "Task: Individual critical task."

Common Soldier Task:
See "Task: Individual critical task."

Common Skill; Common Task:

Community of Interest:

Community Manager:

Competency:
Ability to perform tasks and supporting skills and knowledge to the required standard.

Computer-based Instruction (CBI):
A type of IMI. CBI usually refers to course materials presented or controlled by a computer and which use multiple requirements for student responses as a primary means of facilitating learning.

Computer-based Training (CBT):
A type of IMI. CBT usually refers to course materials presented or controlled by a computer and which use multiple requirements for student responses as a primary means of facilitating mastery of a skill or task.

Conference:
A method of instruction that develops the training material through an instructor-guided student discussion.

Constraints:
Limiting or restraining conditions or factors such as policy considerations, time limitations, environmental factors, and budgetary and other resource limitations.

Content Validation Server (CVS):

Contract:
A promise or set of promises for the breach of which the law gives a remedy or the performance of which the law in some way recognizes as a duty. Its necessary elements are an offer, acceptance, and consideration.

Correspondence Course:
A formal, centrally managed, series of self-study , self-paced instructional material prepared by TRADOC

Training/TD (Task) Proponents; identified by a course title and course number; and administered to nonresident students. A course may include phases, but usually consists of subcourses presented in a logical, progressively sequenced, and directed toward specific learning objectives. See "Army's Correspondence Course Program (ACCP)."

Correspondence Sub-Course:
The basic element of an Army correspondence course. A sub-Course is a self-paced, self-contained module of nonresident instruction consisting of one or more Lessons that teach a part of a critical individual task, a single critical task, or a group of related tasks. It includes a practice exercise with feedback for each lesson and an end-of-sub-Course test. The sub-Course may contain material extracted from Armed Forces publications or other adjunctive materials to support the training. See "Module."

Counseling:
A means of assisting and developing students and subordinates. A leader/instructor counsels subordinates: to praise and reward good performance, to develop teamwork, to inform soldiers on how well or how poorly they are performing, to assist soldiers to reach required standards, to cause soldiers to set personal and professional goals, and to help soldiers resolve personal problems.

Counselor (Cnslr):

Course:
A complete series of instructional units (phases, modules and lessons) identified by a common title or number. It trains critical tasks required for qualification of a specific job. See "Job (or duty position)."

Course Accreditation: Certifies that instruction is conducted IAW proponent guidance and that students graduating from the course are trained to the same standard as students graduating from the same course taught at the proponent service school. Only a subject matter expert (SME) designated by the respective proponent service school is authorized to evaluate and recommend accreditation of a course. Additionally, a course cannot be accredited unless the institution is accredited.

Course Administrative Data (CAD):
A resident course document that provides critical planning information used to determine student input requirements for new and revised courses.

Course Documentation:
Consists of the documents that show the current content of a course (instructional materials, tests, student evaluation plan, etc,) and its developmental history (job analysis, task performance specifications, training strategy, course design, etc.).

Course Iteration:

Course Manager:

Course Map:
A chart that depicts the designed sequence of presentation for a given course established during course design.

Course Proponent:
See "Training proponent."

Course Start Date:
Latest start date for implementing a course.

APPENDIX B - GLOSSARY

Courseware:
An actual instructional package (including content and technique) loaded in a computer, training device, or other instructional delivery system.

Credit Hour:
The measured unit of distributed learning course work. The number of credit hours assigned to a module is the estimated time required for an average student to complete the material.

Critical Individual Task:
See "Task: Individual task."

Critical Task:
See "Task: Critical collective task," and "Task: Critical individual task."

Curriculum:
A course of study. An Army school curriculum consists of the course design, lesson plans, student evaluation plan, tests, course map, all other associated training material, and the Program of Instruction. *Pl.* curricula.

Daily Data Files:

Design:
A major phase in the Systems Approach to Training (SAT) Process. Determines how to train. Translates analysis data into a blueprint for training. It identifies all resource requirements, training structure, learning objectives, training sequence, student evaluation/graduation requirements, program of instruction.

Digital Training Facility (DTF):

Digital Training Facility Manager (DTFM):

Digitization:
The overarching term for the electronic recording of information for distribution via internet (on-line access), computer networks, computer disks (floppies, CD-ROMs), magnetic tapes, optical disks, satellite transmission, and bulletin boards. Digitization may be used for doctrine, training, leader development, organization, materials, and soldier (DTLOMS) purposes.

Digitized Training:
The digitization of training includes the development, implementation/delivery, distribution, and management of training primarily through electronic means. It provides the capability to train soldiers and units throughout the training environment. Examples include the presentation of training through computer-based instruction (CBI), to include simulations and embedded training; the Standard Army Training System (SATS), the Automated Systems Approach to Training (ASAT); etc.

Distance Learning (see Distributed Learning):

Distributed Learning:
The delivery of standardized individual, collective, and self-development training to soldiers and units at the right place and right time through the application of multiple means and technologies. DL may involve both synchronous and asynchronous student-instructor interaction. It may also involve self-paced instruction without benefit of access to an instructor.

APPENDIX B - GLOSSARY

Doctrine:
Fundamental principles by which the military forces or elements thereof guide their actions in support of national objectives. It is authoritative but requires judgment in application.

Domain:
The electronic environment established by the LMS primarily to control access to materials.

Drill:
A disciplined, repetitious exercise to teach and perfect a skill or procedure (action), i.e., a collective task or task step. Drills are published in MTPs and drill books. There are two types:

- Battle Drill.
  A critical collective action (or task) performed by a platoon or smaller element without the application of a deliberate decision making process, initiated on cue, accomplished with minimal leader orders, and performed to standard throughout like units in the Army. The action is vital to success in combat or critical to preserving life. It usually involves fire or maneuver. The drill is initiated on a cue, such as an enemy action or a leader's brief order, and is a trained response to the given stimulus.
- Crew Drill
  A critical collective action (or task) performed by a crew of a weapon or piece of equipment to use the weapon or equipment successfully in combat or to preserve life, initiated on cue, accomplished with minimal leader orders, and performed to standard throughout like units in the Army. This action is a trained response to a given stimulus, such as an enemy action, a leader's brief order, or the status of the weapon or equipment.

Drill Book:
A separate document (or appendix in a Mission Training Plan) developed for squads and platoons (or equivalent units) to provide a limited number of DA standard methods (battle drills) for executing selected critical collective tasks or task steps.

Electronic Publication:
A document prepared in a digital form on a suitable medium for electronic-window display to an end user. Two examples of electronic publications are electronic guides and Interactive Electronic Technical Manuals (IETMs).

Electronic Testing:
A general term encompassing all methods for applying computers in the assessment of human attributes, knowledge, and skills. Sophisticated forms of computer-based testing adapt the sequence, content, number, or difficulty of test items to the responses of the person being tested. As the individual is being tested, the computer presents test item's in response to the individual's actions. The electronic testing method utilizes branching to select test items based on the answers given while the test is being administered.

Embedded Training:
Training that is provided by capabilities designed to be built into or added onto operational systems to enhance and maintain the skill proficiency necessary to operate and maintain that equipment end item.

Enabling Learning Objective (ELO):
A learning objective that supports the terminal learning objective. It must be learned or accomplished to learn or accomplish the terminal learning objective. It consists of an action, condition, and standard. Enabling objectives are identified when designing the lesson. A terminal learning objective does not have to have enabling objectives, but it may have more than one.

Evaluation:

- The cornerstone of quality training.
- One of the five phases of the Army's TD process, i.e., the Systems Approach to Training (SAT). As such, it is a dynamic process that can occur as formal internal and external evaluations or informal feedback between the student and instructor as well as between the field commander or combat training center (CTC) and the proponent school.

Executive Agent:
An organization or member of an organization assigned sole responsibility and delegated authority for specific actions otherwise exercised by a higher level organization or executive.

Exercise:
Collective task training designed to develop proficiency and crew teamwork in performing tasks to established standards. Exercises also provide practice for performing supporting critical individual (leader and soldier) tasks. Exercises may be conducted in units or during resident training. Types of exercises are as follows:

- Command Field Exercise (CFX)
- Command Post Exercise (CPX)
- Field Training Exercise (FTX)
- Lane Training Exercise (LTX)
- Live Fire Exercise (LFX)
- Situational Training Exercise (STX)

Facilitator:

Facility Manager:

File Transfer Protocol (FTP):

Foreign Disclosure:
The conveying of classified military information (CMI) and controlled unclassified information (CUI) through oral or visual means to an authorized representative of a foreign government.

Formal Training:
Training in an officially designated course conducted or administered according to an appropriate course outline and training program and appropriate training objectives. The course may be resident or nonresident.

Functional Description:

Functional Proponent (FP):

GO/NO-GO - pass or fail:
This is an absolute measure: the performer either performed or did not perform the action described in the learning objective, met or did not meet the performance criteria. The performer cannot partially pass. The performer either passes (meets the standard and receives a "GO") or fails (does not meet the standard and receives a "NO-GO").

Graphic Training Aid (GTA):
A Graphic Training Aid (GTA) provides a means for trainers to conduct and sustain task-based training in lieu of using extensive printed material or an expensive piece of equipment. The uses of GTAs range from quick reference memory aids to simulation games for a battalion.

Implementation:
The actual conduct of training by any method of instruction using the validated training materials created during the design and development phases. A major phase in the training development process.

Individual Task:
See "Task."

Individual Training:

- Training which prepares the soldier to perform specified duties or tasks related to an assigned duty position or subsequent duty positions and skill level.
- "Training which officers and NCOs (leader training) or soldiers (soldier training) receive in schools, units, or by self study. This training prepares the individual to perform specified duties or tasks related to the assigned or next higher specialty code or skill level and duty position." (AR 350-41)

Individual Training Plan (ITP):
A document prepared for each enlisted military occupational specialty, warrant officer military occupational specialty, commissioned officer specialty code, or separate functional training program that describes the overall plan to satisfy training requirements and document the long range training strategy.

Instructor:
Any personnel, military or civilian, who conducts instruction.

Instructor training:
The training of selected personnel in the techniques of teaching to qualify them as instructors.

Interactive Courseware (ICW):
A type of IMI. Computer-controlled courseware that relies on trainee input to determine the pace, sequence, and content of training delivery using more than one type medium to convey the content of instruction. Interactive courseware can link a combination of media, to include but not be limited to programmed instruction, video tapes, slides, film, television, text, graphics, digital audio, animation, and up-to-full motion video to enhance the learning process.

Interactive Electronic Technical Manual (IETM):
A technical manual delivered electronically. IETM possesses the following characteristics: it can be presented either on a desktop or a portable device; the elements of data constituting the IETM are so interrelated that a user's access to the information is achievable by a variety of paths; and it provides procedural guidance, navigational directions, and other technical information required by the user.

Interactive Multimedia Instruction (IMI):
IMI is a term applied to a group of predominantly interactive, electronically-delivered training and training support products. IMI products include instructional software and software management tools used in support of instructional programs. A hierarchical representation of IMI products is provided as follows:

- Interactive courseware (ICW)
- Electronic publications.

•• Electronic guides
•• Interactive electronic technical manuals

- Electronic testing
- Simulation
- Electronic management tools

•• Electronic performance support systems
•• Computer aided instruction (CAI)
•• Computer managed instruction (CMI)
•• Electronic job aids

(DoD Instruction 1322.20.)

Job (or duty position):
A collection of unique, specific, related set of activities (tasks) performed by a unique, defined set of personnel. **For training development and training purposes**, it is an MOS by skill level; BC and AOC by rank; warrant officer MOS (Military Occupational Specialty) by skill level; ASI (Additional Skill Identifier); SQI (Skill Qualification Identifier); SI (Skill Identifier); LIC (Language Identifier Code); or other special category. Special categories include but are not limited to common tasks (for a specific skill level), additional duty assignments, and civilian jobs the Army is required to train.

Job Aid:

- A checklist, procedural guide, decision table, worksheet, algorithm, or other device used by a soldier as an aid in performing duty position tasks. It gives the soldier directions and signals when to take action. A job aid is also called a job performance aid.
- A checklist, procedural guide, decision table, worksheet, algorithm, or other aid delivered via electronic means and used by job incumbents to aid in task performance.

Just-in-Time Training:
Training provided to individuals or units just before the skills or function taught will be used in a practical application. Typically used to teach perishable or infrequently used skills. See "Training-on-demand."

Knowledge:
Information or fact required to perform a skill or supported task.

Knowledge-Based Test
Testing procedure that simply asks for recall or the selection of information or knowledge that does not directly relate to using or applying rules, principles, skills, etc., that are required to perform the learning objective. Also called "knowledge-oriented testing."

Knowledge Collaboration Center (KCC):

Leader Development:
The process of preparing military and civilian leaders, through a progressive and sequential system of institutional training, operational assignments, and self development , to assume positions and exploit the full potential of current and future doctrine. (AR 600-100)

Leader Task:
An individual task performed by a leader that is integral to successful performance of a collective task.

Lead Site, also Host Site:
The lead site is the one from which the VTT instructor initiates broadcast.

Learner:

Learning Approver:

Learning:
A change in the behavior of the learner as a result of experience. The behavior can be physical and overt, or it can be intellectual or attitudinal.

Learning Center:
A facility primarily dedicated as a delivery point for individualized or small group multimedia based instruction. Learning centers contain the equipment and training materials needed for training or education.

Learning Management System:

Learning objective (LO):
A precise three-part statement describing what the student is to be capable of accomplishing in terms of the expected student performance under specific conditions to accepted standards. Learning objectives clearly and concisely describe student performance required to demonstrate competency in the material being taught. LOs focus the training development on what needs to be trained and focuses student learning on what needs to be learned. Both terminal and enabling objectives are learning objectives. See "Criterion-referenced instruction (CRI)."

Legacy:
Refers to data, numbers, lessons, etc. that currently exist.

Lesson:
The basic building block of all training. The level at which training is designed in detail. The lesson is structured to facilitate learning. A lesson normally includes telling or showing the soldiers what to do and how to do it, an opportunity for the soldiers to practice, and providing the soldiers feedback concerning their performance. A lesson may take the form of an instructor-presented, a SGI-presented, or a self-paced lesson, such as a correspondence course or CBI lesson.

- An instructor presented lesson or SGI presented lesson is documented as a lesson plan.
- A self-paced lesson must be of sufficient detail that the student can learn the material to the established learning objective standard on his own.
- An extension training lesson is a self paced instructional program developed, reproduced, and packaged for distribution to soldiers in the field. These lessons consist of a terminal learning objective, instructional text, practice, and immediate feedback to the soldier. See "Lesson outline" and "Lesson plan."

Lesson Outline:
An organized outline of the training material to be presented. It identifies the terminal learning objective, enabling learning objectives (optional), learning steps/activities, methods of instruction, media, references, instructor-to-student ratios, resources required, facilities required, safety factors, environmental considerations, and risk factor. The lesson outline is completed during the design phase of the training development process from training analysis data. See "Lesson" and "Lesson plan."

Lesson Plan:
The detailed blueprint for presenting training by an instructor or small group leader (SGL). It prevents

training from becoming haphazard and provides for training standardization. It is built on the lesson outline and includes all the details required for the presentation. It must be of sufficient detail that a new instructor can teach the lesson with no decrement of training. See "Lesson outline" and "Lesson."

Lightweight Directory Access Protocol (LDAP):

Major Command (MACOM):

Materiel Developer (MD):

Maximum Class Size:
The largest number of students in a class that can be trained with acceptable degradation in the training effectiveness due to manpower, facility, or equipment constraints.

Media:
A means of conveying or delivering information. *Example*s of training media are paper, film, videotape, broadcast television, computer program.

Meta Data:
Descriptive or administrative information about a file that is associated with a computer file, but which is stored separately from the file's contents. In the LMS Training Catalog, it generally refers to administrative information about a Course or Product, rather then the contents.

Methods of Instruction:
Indicates exactly how the training material will actually be provided to the student and has an assigned instructor-to-student ratio. ***Examples*** of methods of instruction are conference, demonstration, and practical exercise.

Model:
A physical, mathematical, or otherwise logical representation of a system, entity, phenomenon, or process.

Module:
A grouping of lessons in an approved course of instruction; it could consist of a single lesson, e.g., for distributed learning. Synonymous with annex and sub-course. A module includes one or more training media/methods or combination thereof.

Multimedia:
As a general term, multimedia is the use of more than one media to achieve a specific purpose or objective. The term is used primarily to refer to a technology combining text, still and animated images, video, audio, and other forms of computer data that can be manipulated and used to convey information in a useful, educational, entertaining, realistic, or more easily understood manner. Multimedia is delivered on a multimedia work-station/personal computer via network, hard disc, floppy disc, or CD-ROM.

National Training Center (NTC):
The Fort Irwin training center that provides a heavy combat battalion task force 2 weeks of intensive combat training on a rotational basis.

New Equipment Training (NET):
An initial transfer of knowledge, gained during equipment development, from the materiel developer/provider to the trainer, user, supporter.

Non-ATRRS Managed Courses:

Non-resident Training:
Training presented to students that is not instructor/facilitator-led and does not take place in residence, e.g., it takes place in Army learning centers, DL classrooms, and student residences. Instruction is self-paced.

Objective Force:

One-station Unit Training (OSUT):
Initial entry training conducted at one installation in one unit with the same cadre and one program of instruction.

Operational requirements document (ORD):
A formatted statement containing performance (operational effectiveness and suitability) and related operational parameters for the proposed system. The operational requirements document will be initially prepared during Phase 0 "Concept Exploration and Definition". It will be updated during Phase 1, "Demonstration and Validation."

Optimum Class Size (OCS):
The largest number of students in a class that can be trained with no degradation in training effectiveness. The constraining factor is the availability of equipment, facilities, and manpower. OCS serves as the basis for determining equipment and resource requirements.

Phase:
A major part of a training course which may be trained at different locations. Phases are required as a necessary break-up of a course version due to time, location, equipment, and facility constraints as well as facilitation in management of different techniques of instruction. A phase contains one or more modules. See "Phased training."

Portal:

Prerequisite Training:
That training which personnel must have successfully completed in order to be qualified for entry into training for which they are now being considered.

Pretest (diagnostic test):
An assessment which measures soldier or civilian task competency before training. As it measures performance against a criterion, results focus training on what soldiers/civilians need to know and provide links to this prescriptive training. As a placement test, it allows for testing out of lessons, modules, or phases of a course. See "Performance test" and "Posttest."

Procedure:
A standard and detailed course of action that describes how to perform a task.

Product Distributor:

Production LMS:

Professional Development Course:
A course designed to prepare commissioned officers, warrant officers, or noncommissioned officers to effectively perform the duties required in assignments of progressively greater responsibility.

Proficiency:
Ability to perform a specific behavior (task, learning objective) to the established performance standard in order to demonstrate mastery of the behavior.

Program of Instruction (POI):
A POI covers a course/phase. It is a requirements document that provides a general description of course content, duration of instruction, and methods and techniques of instruction; and it lists resources required to conduct peacetime and mobilization training.

Proponent Agency:
An Army organization or staff which has been assigned primary responsibility for materiel or subject matter in its area of interest, i.e., proponent school, proponent staff agency, proponent center, etc.

Proponent School
The TRADOC School designated by the CG, TRADOC or other appropriate MACOM as Training/TD (Task) Proponent to exercise management of all combat/training development aspects of a materiel system, functional area, or task. It analyzes, designs, develops, implements, and evaluates training/training products for proponency area.

Qualification:
With respect to Instructors in the LMS

Quota Course:
A course managed, controlled, and conducted by one service or agency which may be used by another service to satisfy a training requirement or need.

Quota Manager:

Reclassification training:
A soldier may be reclassified into a new job due to organizational restructure, mission or new/revised systems, etc. Reclassification training is training provided to those individuals which qualifies them to perform in a newly assigned job (MOS, AOC, etc.).

Refresher Training:
Used to reinforce previous training and/or sustain/regain previously acquired skills and knowledge. It-

- Is --

  - Related to course-specific training objectives.
  - Performed under prescribed conditions and must meet prescribed performance standards.

- Usually takes place in the unit to sustain or retrain a previously required proficiency level; may be trained to prepare an individual for institutional training, i.e., meet prerequisite training requirements.
- May take place in a course during/outside of POI time.

Registration:

Reimer Digital Library; Dennis A. Reimer Digital Library:
(see Army Doctrine and Training Digital Library)

Requirements:

Reservation:

Resident School:

Resident Training:

Resident Training Course:
A course presented to students usually in a formal training environment by trained instructors. The training may be presented by conventional methods, such as conference; by advanced technology, such as computers; by distributed training methods; or a combination of methods.

Resource:

Resource Management:
The control of the identification, acquisition, and use of training development and training resources to obtain maximum and timely training efficiency.

Response:
Any activity which is induced by a stimulus. In instruction, it designates a wide variety of behaviors,which may involve a single word, selection among alternatives (multiple choice), the solution of a complex problem, the manipulation of buttons or keys, etc. [System response]

Schedule:

Scheduled Training:

Scheduler (Sched):

Scheduling:

Security Domain:

Selection, Course/Product:

Self-Directed/Self-Initiated Training:

Simulation:

- A method for implementing a model(s) over time.
- Any representation or imitation of reality, to include environment, facilities, equipment, mechanical and maneuver operations, motion, role playing, leadership, etc. It is the representation of salient features, operation, or environment of a system, subsystem, or scenario.

Simulator:

(1) A device, computer program, or system that performs simulation.
(2) For training, a device that duplicates the essential features of a task situation and provides for direct practice.

(3) A physical model or simulation of a weapons system set of weapons systems, or piece of equipment which endeavors to replicate some major aspect of the equipment's operation.

Site:

Situational Training Exercise (STX)
Mission-related, limited exercises designed to train one collective task or a group of related tasks and drills through practice. STXs teach the standard, preferred method for carrying out the task. They are more flexible than drills and usually include drills, leader tasks, and soldier tasks. STXs may be modified based on the unit METL or expanded to meet special mission requirements. To ensure standardization, service schools develop STXs to teach the doctrinally preferred way to perform specific missions or tasks. (FM 25-101) See "Exercise."

Skill:
The actions or series of actions performed by soldiers to accomplish a mission or the ability to perform a job related activity, which contributes to the effective performance of the job. See **task.**

Skill Gap Analysis:
The process of examining…

Skill Level:

Identifies task proficiency, or ability typically required for successful performance at the grade with which the skill level is associated. The skill levels by grade are shown below:

Skill Levels	-->	1	2	3	4	5	
Enlisted	E	1/2	3/4	5	6	7	8/9
Warrant	W	1/2	3		4	5	
Officer	O	1/2	3	4	5	6	

Small Group Instruction (SGI):
A means of delivering training which places the responsibility for leaning on the soldier through participation in small groups led by small group leaders who serve as role models throughout the course. SGI uses small group processes, methods, and techniques to stimulate learning.

Small Group Leader (SGL):
An instructor who facilitates role modeling, counseling, coaching, learning, and team building in SGI.

Standard:
A statement which establishes a criteria for how well a task or learning objective must be performed. The standard specifies how well, completely, or accurately a process must be performed or product produced.

- The task standard reflects task performance requirements on the job.
- The learning objective standard reflects the standard that must be achieved in the formal learning environment.

Standardization:
As applicable to Army training means --

- The development and implementation of performance standards which the Army employs in training and in combat.
- Units and soldiers performing the same task will be trained to perform that task to the same standard.
- Training products are produced in one format by the training proponent and used by other training activities.

Student Evaluation Plan:
A plan that details how the proponent school will determine if the student has demonstrated a sufficient level of competency to pass the specified course or training. It specifically identifies course completion requirements to include the minimum passing score (or GO/NO GO) for each written or performance examination, final grade requirement, minimum course attendance requirements (if applicable); and specific tests that must be satisfactorily completed to graduate. It very specifically identifies how the student's performance will be evaluated. Specific lessons tested in each test are identified. Counseling and retesting policy are delineated. Other evaluations, such as the Army Weight Control Program and Army Physical Fitness Test, that impact on graduation are identified, and their requirements are included.

Student Performance Counseling:
As related to training, communication which informs soldiers/students about their training and the expected performance standards and provides feedback on actual performance. Soldier/student performance includes appearance, conduct, learning accomplishment, and the way learning is being carried out.

Subject Matter Expert (SME):
An individual who has a thorough knowledge of a job (duties and tasks). This knowledge qualifies the individual to assist in the training development process (i.e., consultation, review, analysis, etc.). Normally, a SME will instruct in his area of expertise.

Sustainment:

Sustainment Training:
See "Refresher training."

Synchronous Training:

System Administrator (SA):

System Delivery Report:

System Interface Agreement (SIA):

Task:
A clearly defined and measurable activity accomplished by individuals and organizations. It is the lowest behavioral level in a job or unit that is performed for its own sake. It must be specific; usually has a definite beginning and ending; may support or be supported by other tasks; has only one action and, therefore, is described using only one verb; generally is performed in a relatively short time (however, there may be no time limit or there may be a specific time limit); and it must be observable and measurable. The task title must contain an action verb and object and may contain a qualifier. Types:

- Collective task:

A clearly defined, discrete, and measurable activity, action, or event (i.e., task) which requires organized team or unit performance and leads to accomplishment of a mission or function. A collective task is derived from unit missions or higher level collective tasks. Task accomplishment requires performance of procedures composed of supporting collective or individual tasks. A collective task describes the exact performance a group must perform in the field under actual operational conditions.

- Common task:

•• Common skill level task
An individual task performed by every soldier in a specific skill level regardless of MOS or branch., e.g., a task performed by all captains.
•• Common soldier task
An individual task performed by **all** soldiers, regardless of rank.
Example: All soldiers must be able to perform the task, "Perform mouth-to-mouth Resuscitation."
Note: There are common soldier tasks that apply to all Army civilian employees as well, e.g., Maintain security of classified information and material.

- Critical task:

A collective or individual task a unit or individual **must** perform to accomplish their mission and duties and to survive in the full range of Army operations. Critical tasks must be trained. Types of tasks that can be identified as critical include:
•• Collective task.
•• Common skill level task
•• Common soldier task.
•• Individual task
•• Shared task

- Individual task:

The lowest behavioral level in a job or duty that is performed for its own sake. It should support a collective task; it usually supports another individual task. Individual tasks include ---
•• Common soldier task.
•• Leader task. •• Common skill level task.
•• Organizational level task

- Organizational level task:

Common skill level task shared by other skill levels, e.g., company captains and first sergeants may perform the same tasks.

- Shared task:

•• **Organizational**: See "Task: Organizational level task."
•• **Shared individual task**: An individual task performed by soldiers from different jobs and/or different skill or organizational levels. Shared asks are usually identified when conducting an analysis of a specific job. *Example:* The lieutenant and sergeant in the same platoon perform some of the same tasks.•••**Shared collective task**: A shared collective task is a collective task that applies to or is performed by more than one type unit, e.g., to units which have different proponents or to different echelon/TOE units within

a single proponent's authority. Since the task, conditions, standards, task steps, and performance measures of shared collective tasks do not change, the collective task is way trained and performed in the same by all units that "share" the task.

Task Proponent:
See "Training/TD (Task) Proponent."

TASS Training Battalions:
The training institution of both the ARNG (state military academies, National Guard Bureau (NGB) Regional NCOA/Schools, etc.) and USAR (US Army Reserve Forces Schools/USARC NCOA, etc.). TASS Training Battalions comprise all NCOAs and schools of the Reserve Component.

Team:
A group of people who function together to perform a mission or collective task.

Technical Manual (TM):
A publication which describes equipment, weapons, or weapons systems with instructions for effective use. It may include sections for instructions covering initial preparation for use and operational maintenance and overhaul.

Tele-training:
Video or audio training delivered via communication links such as satellite or cable links.

Template:
1) A generic (not scheduled) model of a specific block of instruction. It contains all the metadata, Content, and Resource requirements associated with that curriculum. In the LMS, templates are associated with Lessons. 2) In testing, the answer key used to grade tests. It can be a score sheet with correct answers listed or it can be electronic and used with an optical scanner to score tests.

Test:
A device, technique, or measuring tool used to --

- Determine if a student or group can accomplish the objective to the established standard.
- Determine it training does what it is designed to do efficiently and effectively.
- Measure the skill, knowledge, intelligence, abilities, or other aptitudes of an individual or group.
- Collect data as a basis for assessing the degree that a system meets, exceeds, or fails to meet the technical or operational properties ascribed to the system.

See "Criterion-referenced test"; "Knowledge-based test"; "Norm-referenced test"; "Performance test"; "Performance-based test; "Placement test"; "Pretest"; "Testing out."

Testing Out:
The process and procedure for enabling a student to take a course test (phase, module, lesson, etc.) to determine if the training covered by the test must be taken. A student passing a pretest to test-out of training will be given full credit for completion of the training covered by the test. This is a "pretest."

The Army School System (TASS):
A composite school system comprised of the AC, ARNG, and USAR institutional training systems. The TASS, through the Army's training proponents, provides standard training courses to America's Army, focusing on three main points of effort---standards, efficiencies, and resources. The TASS is composed of accredited and integrated AC/ARNG/USAR schools that provide standard institutional training and education for the Total

Army. The TASS training battalions are arranged in regions and functionally aligned with the Training/TD (Task) Proponents. (TR 351-18)

Total Army Training System (TATS) Course:
A single course designed to train the same military occupational specialty (MOS)/area of concentration (AOC) skill level, Skill Qualification Identifier (SQI), additional skill identifier (ASI), Language Identifier Code (LIC), and Skill Identifier (SI) within the Total Army. It also includes MOS Qualification (MOSQ, i.e., reclassification), Army leadership, functional, professional development, and civilian courses. The course's Total Army structure (phases, modules, tracks, lessons, tests) and media ensure standardization by training all soldiers (regardless of component) on course critical tasks to task performance standard. Course lengths, but not academic hours, may vary due to such differences as Active and Reserve Component (AC/RC) training day lengths.

Trainer:

- An individual who conducts training, whether in a unit or a training institution.
- For the Train the Trainer Program, it implies all training related personnel involved in the training mission, such as instructors, training developers, analysts, small group leaders, and evaluators.

Training Aids, Devices, Simulators, and Simulations (TADSS):
A general term that includes Combat Training Center (CTC) and training range instrumentation; Tactical Engagement Simulation (TES); battle simulations; targetry; training-unique ammunition; dummy, drill, and inert munitions; casualty assessment systems; graphic training aids; and other training support devices. All of these are subject to the public laws and regulatory guidance governing the acquisition of materiel. TADSS are categorized as system and nonsystem:

- System Training Devices (STDs): STDs are designed for use with a specific system, family of systems, or item of equipment, including subassemblies and components. STDs may be designed/configured to support Individual, crew, collective, or combined arms training tasks. They may be stand-alone, embedded, or appended. Using system-embedded TADSS is the preferred approach where practical and cost effective.
- Nonsystem Training Devices (NSTDs): NSTDs are designed to support general military training and nonsystem-specific training requirements.

Training Course
Structured, sequenced training designed to train a student to perform identified learning objectives to the prescribed standard. The training may be presented by advanced technology, such as computers; by conventional methods, such as conference using trained instructors; by distributed learning techniques, such as distributed print or interactive multimedia instruction (IMI) modules; or by a combination thereof.

Training Developer:

- The individual whose function is to analyze, design, develop, and evaluate training and training products, to include development of training strategies, plans, and products to support resident, non-resident, and unit training. Any individual functioning in this capacity is a training developer regardless of job or position title.
- In developing systems, the command or agency responsible for the development and conduct of training which will provide the tasks necessary to operate and logistically support the new materiel system.

Training Development (TD):
The Army's training development process is the Systems Approach to Training (SAT). It is a systematic, spiral

approach to making collective, individual, and self-development training decisions for the total Army. It determines whether or not training is needed; what is trained; who gets the training; how, how well, and where the training is presented; and the training support/resources required to produce, distribute, implement, and evaluate those products. The process involves five training related phases: analysis, design, development, implementation, and evaluation.

Note: Do not confuse the overall TD process with the particular Systems Approach to Training (SAT) phase called "development," which is related specifically to the development of training and training products following analysis and design.

Training Device:
Three-dimensional object and associated computer software developed, fabricated, or procured specifically for improving the learning process. Categorized as either system or nonsystem devices.

- System device

  Device designed for use with a system, family of systems, or item of equipment, including subassemblies and components. It may be stand-alone, embedded, or appended.

- Nonsystem device

  Device designed to support general military training and non-system specific training requirements.

Training Equipment:
An item of tactical or non-tactical equipment or components used for training purposes in which the pieces of equipment do not lose their identity as end items for operational purposes, e.g. rifles, vehicles, communication equipment, and aircraft.

Note: Subject to availability, conversion of operational equipment that is already in the Army inventory to training equipment will be accomplished by executing a change to the gaining organization's Table of Distribution and Allowances (TDA), thereby authorizing the item of equipment to be issued to the organization. Operational equipment required for training that is not in the Army inventory will be procured as items of TADSS IAW AR 70-1 and AR 350-38.

Training Environment:
The physical and cognitive environment , which fosters, stimulates and facilitates learning. The "environment" includes a myriad of variables, such as the physical location or site where unit or individual training is conducted; training aids, devices, simulators, and simulations (TADSS), to include level of simulation (live/virtual/ constructive); automation hardware/software; suitability (change to "applicability and effectiveness") of training materials; delivery technique (small group instruction, IMI, VTT, etc.); instructor/facilitator effectiveness/ competency.

Training Event:
Scheduled training activity for initial or sustainment training of a mission, collective task, or individual task in a unit as identified by a combined arms short-range unit training strategy.

Training Facility:
A permanent or semi-permanent facility, such as a firing range (range towers, scoring benches, lane markers, range signs), confidence course, military operations on urbanized terrain (MOUT) complex, aircraft mock-up, jump school tower, or training area.

Training Management:
The process commanders and their staffs use to plan training and related resource requirements needed to conduct and evaluate training. It involves all echelons and applies to any unit in the Army regardless of strength, mission, organization, or equipment assigned.

Training Materials:
Those materials developed as a result of training design and provided to teach or evaluate training. They include, but are not limited to; computer based instruction, correspondence courses, training literature products, student handouts, and other products used to train to a prescribed standard.

Training Means:
Combinations of events and media (live or simulation) that might be selected to train a mission/task. You must select an appropriate means for each time you intend to conduct training on a task. See "Training event".

Training Media:
See "Media."

Training Method:
The procedure or process for attaining a training objective. *Example*s include lecture, demonstration, discussion, assigned reading, exercise, examination, seminar, and programmed instruction.

Training-On-Demand:
Training provided to a unit at the commander's request to meet an immediate mission need. See "Just-in-time Training."

Training Plan:
A detailed description of the actions, milestones, and resources required to implement a training strategy. The detail depends upon the plan type and level. See "Project Management Plan" and "Training Development Plan."

Training Product:

Training Program:
An assembly or series of courses or other training requirements organized to fulfill a broad, overall training goal.

Training Proponent:
See "Training/TD (Task) Proponent."

Training Requirements:

- As related to training implementation --

  The critical tasks Army's units and soldiers must be able to perform to the standard required if they are to be able to fight, win, and survive on the battlefield. Army training and training products will only be produced to meet a valid training requirement and to train soldiers and units to perform critical collective and individual tasks to established standards.

- As related to resident course management ---

The number of personnel required to enter into training to meet commitments of the military services concerned.

Training Sequence:
Ordering the parts of a training program/course to optimize learning.

Training sSte:
Any location where training is implemented, to include proponent school, soldier's home, learning centers, and units.

Training Structure:
The organization of instruction into logical groupings to facilitate learning. The basic structures of formal Army training are: phases, modules (annex, sub-course), and lessons. See "Sequencing.

Training Support:
The provision of the materials, personnel, equipment, or facilities when and where needed to implement the training. It includes such functions as the reproduction and distribution of training products and materials, training scheduling, student record maintenance.

Training Support Center (TSC):
An authorized installation activity with area responsibility to provide storage, instruction, loan/issue, accountability, and maintenance for TADSS.

Training Support Package (TSP):
A complete, exportable package integrating training products, materials, and information necessary to train one or more critical tasks. It may be very simple or complex. Its contents will vary depending on the training site and user. A TSP for individual training is a complete, exportable package integrating training products/materials necessary to train one or more critical individual tasks. A TSP for collective training is a package that can be used to train critical collective and supporting critical individual tasks (including leader and battle staff).

Training System:
A training system is the combination of all elements of a training program working together to bring about the preparation of units to perform their missions and/or personnel to effectively perform their assigned jobs. A training system consists of training hardware, facilities, and personnel subsystems.

Training technology:
The use of technology for the development, delivery, and/or implementation of learning oriented activities to accomplish the learning objective. It includes hardware/software solutions and/or human learning process solutions to training problems. Examples of hardware/software training technologies include Interactive Multimedia Instruction (IMI), linked simulations, virtual reality, artificial intelligence, embedded training, voice input/out devices and global networks.

Trigger:

Uniform Resource Locator (URL):

Unit Training:
Training (individual, collective, and joint or combined) which takes place outside the Army's institutional base.

Unit Training Manager (UTM):

APPENDIX B - GLOSSARY

Version

Video Teletraining:
Video training delivered via communication links such as satellite or cable links. There are two types of VTT: broadcast and desktop

VTT Instructor:
The instructor who conducts training via a VTT system. Examples include Teletraining Network (TNET), Integrated Services Digital Network (ISDN), and Satellite Educational Network.

Web-based Training:
Web-based training is a DL method in which training applications residing on a central computer functioning as a network server are delivered across a public or private computer network (e.g., the Internet) to students at any location and displayed on a Web browser. Authorized students may access training applications on demand and download them for individualized instruction. Web-based training can be updated very rapidly, and access to the training may be controlled by the training provider.

LEARNING MANAGEMENT SYSTEM

Appendix C – Reference Tabs

TAB 1

Manage Your Courses' Progression

The courses assigned to you or acquired by you are listed on the Courses page, which are displayed by clicking the **Course Progression** link in the sidebar in the **My Development** module. You can sort the list by clicking the underlined column heading. Some of the items have underlined terms that allow you to see more detailed information or to take an action. You can control which courses appear in the list by selecting a category from the drop-down list and clicking **Go**.

You can assign a course to yourself by clicking the **Add New Course** button at the bottom of the page.

Statuses change as you are assigned courses, acquire them, and then allow them to expire. The possible statuses are:

- Planned - this status indicates you have not yet met a prerequisite for the course.
- In Progress - this indicates you have completed at least one of the items.
- Acquired - this indicates you have completed all required items within the **Acquire Within** period, or have re-certified within the recertification window.
- Expired - this indicates that you have allowed a course to expire or that an administrator has forced it to expire.

When you first begin the process of acquiring a course, usually it will start with either a **Planned** or **In Progress** status, and then change to **Acquired** when you complete the last required item. Once you acquire a course, it is always listed on your Courses page. However, sometimes courses are forced to expire by an administrator, or expire when they reach the end of their valid period.

An administrator can also create a new course version. These events will cause a course status to change, and require you to either recertify or re-acquire it if it is still assigned by your role or your manager. If a course is assigned through your role, you must stay in compliance. (Keep it in **Acquired** status). If you let it expire, it will be re-assigned to you automatically. If it is assigned by your manager and expires, that person will have to reassign it manually.

You can understand the reason for a status and which actions you must perform by viewing the information on your Courses pages. When each task is performed depends on the status of the course at a given time. The following table describes the different statuses in relation to the actions required, and indicates the message entered by the system into the **Needs Recertification** column.

Course Status	Need Recertification	Action Required
Planned or In Progress	No	Acquire course using an original path only, within the Acquire Within period
Acquired, but a new course version has been created	No	Acquire the new course version
Expired	No	Re-acquire the same course version you had previously acquired
Acquired, but now within recertification window period	Yes, recertify	Recertify using a recertification path only
Acquired, but a new product version has been created	Yes, complete new product version(s)	Recertify by completing the new product version contained in the original path, within the new expiration date
Acquired, but within recertification window period, *and* a new product version has been created	Yes, recertify or complete new product version(s)	Either recertify using a recertification path, *or* complete the new product version(s)

TAB 2

Manage Your Skills

Clicking the **Skills** link in the sidebar displays the Current Skill List page that shows a list of the skills you hold. You can use this page to assess a skill or add new skills. You can sort the list by clicking the underlined column heading. Some of the items have underlined terms that allow you to see more detailed information or to take an action.

A held skill is measured by proficiency level. The proficiency level is determined by a combination of assessment methods, which can include self-assessment, manager assessment, multi-rater assessment, learning, and testing as well as custom-defined assessment methods. For a given skill, each applicable assessment method is associated with a relative weight, which represents its value as a proficiency indicator. For example, an organization may consider testing to be a stronger measure of proficiency than self-assessment, in which case these methods would be weighted differently.

You can perform the following tasks on the Skills page.

View a Skill's Detail

Click the title of a skill to view detailed information, including a description and any attachments that may have been added.

Find a Skill's Community

Click a community icon, if present, to view a list of communities that are associated with the skill. You can add one or more communities to your watch list.

Assess a Skill

Click the **Assess** button in a skill's row to enter a self assessment for the skill. You can enter a proficiency level and comments before saving the assessment.

Because self-assessment of skills is based on personal opinion, self-assessments typically carry a lower weight than assessment of skills than the other methods (e.g. completing an educational product, multi-rater assessment, and manager assessment).

View a Skill's Assessment History

Select the radio button next to a skill and click the **View History** button to view the assessment history for the skill. You can click on the **Rater** name to view personal information on the person who made the assessment. You can send email to the person from this page.

Add a Skill

Click the **Add Skill** button to add a skill to the list. When adding a new skill, you will be asked to provide a proficiency level for yourself.

TAB 3

Viewing Course, Lesson, or Product Details

When your Training Catalog search results have been returned, you have the option to view the details of the course, phase, module, lesson, or product.

The action is performed by clicking the title of the catalog item under the **Title** column.

TAB 4

Request Registration

To request registration for a catalog item:

1. Click the **Training Catalog** tab.
2. Select a catalog from the **Catalog** drop-down list.
3. Enter search criteria in the fields in the sidebar and click **Go**.
4. Click either the "+" icon next to a product or the Finder icon next to a lesson to find an iteration of that lesson.
   - If you click the "+" icon next to a product, the confirmation pop-up window will appear and you can request the item (see the next step).
   - If you click a finder icon next to a lesson, the Find a Lesson page appears. Click the "+" icon next to a lesson to display the confirmation pop-up window and request the lesson (see the next step). You can also enter search criteria and click the **lesson request** link to ask for a lesson to be scheduled at another time or location.
5. Click **Submit**.

Requested items appear on your Registrations page.

Waitlisted Registrations

If you register for a lesson that has no seats available, you will be put on a waitlist. You can display all your waitlisted registrations on your My Home Welcome page by selecting the **Wait-listed Registrations** check box on the Personalize Home Page.

TAB 5

Search the Catalog by MOS

You can search the course catalog based on MOS. To search based on MOS use the following steps:

1. Click on the My Home drop-down in the upper right hand corner.
2. Click on the My Development Tab.
3. Click on Individual Training Plan in the Left Navigation Pane.
4. Select a MOS from the Target MOS/Career Field drop down.

All Courses pertaining to that MOS will appear. You cannot register for the class on this screen, but can go back to the training catalog to register.

TAB 6:

Search the Catalog

Searching allows you to search for education/training offerings and create registration requests. In addition, you can search for learning offerings and create registrations on your behalf. You can also use the search to find items to put into learners' development plans. You access the Catalog by either of the following to methods.

1. Select the Training Catalog tab in the Header Bar
2. Select the Search Training Catalog function link in the left sidebar of your homepage.

When you access the Catalog, you have the option to select one of the following catalog options listed below. These options can be selected by using the drop-down list in the upper left corner of the Catalog page. Based on the catalog options, you will have the ability to enter search criteria and click Go to return a set of possible matches to your search criteria. The default, and most common method of searching, will be the Training Catalog search option.

Browse Catalog

Selecting this menu choice automatically lists catalog categories in the sidebar. Clicking each underlined category will show subcategories that can be clicked to display the search results in the main window. Clicking the "+" and "-" symbols will expand or collapse the categories tree.

Training Catalog

This is the default choice when you display the Training Catalog page. Selecting this menu choice and clicking **GO** will display all items in the catalog. You can filter the items displayed by using the search fields in the sidebar, which will display only items that fit the criteria you enter. You can also click the **Lesson Only** link at the top of the sidebar to search only for lessons instead of the all the items in the full catalog.

Personal Catalog

Selecting **Personal Catalog** from the drop-down list and clicking ‘GO’ will restrict the search results according to the preferences you select when you create a personal catalog.

Course Progression

Selecting this menu choice allows you to list courses in the search results page. Using the search fields in the sidebar menu, you can narrow the search to a specific course version or to courses that were available from a certain date.

Skills

Selecting this menu choice allows you to list skills in the search results page. You can click the skill title to see detail information and a description. Clicking the **View All** link in the **Learning Suggestions** column displays a list of learning items that you can complete to gain the skill at a certain level. Clicking the **Community** icon displays information about communities that can offer assistance in gaining the skill.

You can also search the catalog by "MOS". (See Tab 5.)

TAB 7

View Training History

Clicking the **Transcript** link in the sidebar displays the Transcript page that shows a list of all catalog items that you have completed. When you complete a course, phase, module, lesson, or product and/or it is delivered by an instructor, it moves from the list on your Registrations page to this list on your Transcript page. You can sort the list by clicking the underlined column heading. Some of the items have underlined terms that allow you to see more detailed information or to take an action.

"Completing" an item means that you have finished it. Indicating that it was completed successfully or unsuccessfully determines if you will receive competencies or other credit associated with the item. Additionally, a score or grade can be entered for completing the item. You can request and complete catalog items more than once, and each attempt will cause an update of the completion of an item. Items are marked complete initially on the Registrations page, and subsequent completion updates are made from the Transcripts page. The results of these updates can be viewed on your Transcript History page. An "unsuccessful" completion can be changed to a "successful" completion for an item, but not the reverse. This means that once an item is completed successfully, you will gain any competencies or other credit stemming from that completion, even if the status is later changed to "unsuccessful." A history of any changes is recorded on the Transcript History page.

A business rule set by the system administrator determines who can mark an item complete, determine the success of the completion, and enter scores. If you can perform these tasks, icons will appear next to the item listing. Otherwise, a manager or instructor will mark scores and update completion.

Ad hoc Learning

Learning Approvers and Managers can give you credit for learning by recording ad hoc learning events. This means they give you credit for completing a class or product, even though you never requested it or registered for it, because you have demonstrated knowledge of the material. Ad hoc events appear on your Transcript page.

Transcript Tasks

You can perform the following tasks on the Transcript page.

View Transcript Item Detail

Click an item **Title** link to see detailed information about that item. The information available will vary with the type of item (classes will have start and end dates; downloadable products will have part numbers).

View Update Information

Click the **Updated By** name link to see personal information about the person who marked the item complete or assigned a score to the item. You can send email to the person from this page.

View Transcript Item History

Click the **History** icon to see a list of the results from each instance when the item was either launched or when its completion status was updated.

TAB 8

Registration Page Actions:

The following items can be performed on the Registrations page, which can be found in one of two ways.

1. Click Development Plan tab in Header Bar
2. Click the Registrations link in the left sidebar of your Homepage

View Registration Item Detail

Click an item title to see detailed information about that item. The information available will vary with the type of item (lessons will have start and end dates; downloadable products will have part numbers).

View Lesson Location

Click an item title to see detailed information about that item's location. This only applies to scheduled lesson since other types of items have no location (online products, books, videos, etc.). There may be attachments included, such as a map showing the location.

Cancel a Registration

Cancel a registration by clicking the cancel icon. This will remove the item from your registration page, but you can still view the record of the order on your Request History page. You can cancel a registration for an entire courses, phases, or modules (if non-ATRRS managed) or for individual lessons or products. You can also cancel the ordered item from the order history detail link on your Order History page.

Additionally, the LMS will prompt you to enter a reason code for canceling the requested learning item. When you cancel a requested item, the LMS will launch a pop-up window that will ask you to select a cancellation reason from a pre-defined list.

Note: You can also cancel lesson requests – see TAB 9, “View Your Lesson Request History"

Mark Self-Directed Products Complete

If a business rule is enabled to allow learners to mark products (not courses, phases, modules, or lessons) complete, you can do so from the Registrations page. As soon as you mark an item complete, it moves to your Transcript page. Once it moves to the Transcript, you can no longer mark the item complete, even if the item has been marked as complete without success.

However, from the Transcript page you can continue to use launchable/downloadable content, and the LMS will continue to record results for the content in the Transcript. The most recent results are always displayed as the current record in the Transcript. All

previous records are stored on the History page, which can be accessed by clicking the **History** icon on the Transcript page.

View an Order's Detail

Click the order detail icon to view detail information about an order. Information includes items such as order ID number, order status, etc.

Launch Online Content

Clicking the Join/Launch icon next to an item will launch online content, a virtual classroom, or a virtual learning environment (VLE), depending on how the item has been designed.

If the online content is not trackable, you simply interact with it. If it is trackable, it will note your interactions, and can report your success or failure in learning the content, and can mark itself "complete" when you are finished, thereby moving itself from your Registrations page to your Transcript page.

If the content is presented as a virtual classroom, it will appear in the LMS Player and will be synchronized with an instructor-led lesson.

If the lesson is a VLE, it will be presented in a window designed by the provider of the learning experience, and may or may not include online content.

Registration Page Actions:

The following items, view results and view online content results, can be performed on the Registrations page, which can be found in one of two ways.

1. Click Development Plan tab in Header Bar
2. Click the Registrations link in the left sidebar of your Homepage

View Results

You can click the **View Results** icon to see results of any catalog item that has been given a score.

The Registrations and Transcript pages display the following results information for each catalog item:

Field	Description
Status	On the Registrations page, the status value reflects the order status. It can have the following values: ▪ Open - Confirmed ▪ Open - Unconfirmed ▪ Delivered - Normal

	On the Transcript page, the status value indicates whether the learner completed the item successfully or unsuccessfully. Specifically, it can have the following values: ▪ Successful ▪ Unsuccessful ▪ Dropped
Score	Score reported by the content for the learner's most recent attempt. The score is expressed as a percentage.
Grade	The grade, which is manually recorded by the class instructor. **Note** This value applies only to instructor-led lessons and not to web-based content.

Online Content Results

All catalog items with launchable or downloadable content have a **View Results** icon that appears on the Registrations and Transcript pages. Clicking the **View Results** icon opens the Results page, which displays the following detailed results information for the content associated with the catalog item:

Field	Description
Lesson	For AICC-based content with multiple assignable units (AUs), this field displays the name for each AU. For non-AICC-based content as well as AICC-based content with a single AU, this field is left blank.
Status	Displays the completion status reported by the content for the learner's most recent attempt. The completion status can have any of the following values: ▪ Passed ▪ Completed ▪ Failed ▪ Browsed ▪ Incomplete ▪ Not Attempted Any time the score reported by the content is equal to or greater than the mastery score reported by the content, the LMS automatically sets the completion status to **Passed**. The LMS uses this status value to determine whether the catalog item

	should be automatically marked complete and moved from the learner's Registrations page to the learner's Transcript. For AICC-based content with multiple AUs the completion status is reported for each AU.
Credit	Indicates whether or not the content is intended to be taken for credit, as reported by the content. For AICC-based content with multiple AUs this information is provided for each AU.
Score	Displays the score reported by the content for the learner's most recent attempt. Content with no assessments always reports a score of 100. For AICC-based content with multiple AUs the score is reported for each AU.
Mastery Score	Displays the score, as reported by the content, that is required for mastery of the content. For AICC-based content with multiple AUs the mastery score is reported for each AU.
Max Score	Displays the maximum possible score, as reported by the content. For AICC-based content with multiple AUs the maximum score is reported for each AU.
Attempts	Displays the number of times the learner has launched the content. For AICC-based content with multiple AUs the number of attempts is reported for each AU.
Time	Displays the total time the learner has spent in the content across all attempts. For AICC-based content with multiple AUs the time spent is reported for each AU.
Interactions	Interactions data is detailed results information about the learner's responses to questions on a test. Standards-based content (specifically AICC and SCORM) can track and report this information. If it is reported, the LMS records it. Clicking the View Interactions link opens the Interactions page, which displays the following information about each question for which interactions data is provided:

	▪ ☐ Question ID ▪ ☐ Question type (multiple choice, true/false, etc.) ▪ ☐ Learner response ▪ ☐ Result (correct or incorrect) ▪ ☐ Weighting of question ▪ ☐ Time spent on question ▪ ☐ Date/time stamp for interaction For AICC-based content with multiple AUs interactions data can be reported for each AU.

TAB 9:

View Your Lesson Request History

You can view a history of all learning items that you have requested (ordered) in the past within the Personal Info tab.

Click the **Lesson Requests** link to view your lesson requests. The Lesson Request History page lists information on lessons you have requested or have been requested for you, and allows you to cancel a request that you have made.

TAB 10:

Creating a Rate Template for a Resource

To create a rate template in the LMS:

1. Select **Resources** in the **Go to:** drop-down list
2. Click either the **Room**, **Equipment**, or **Employee** tabs to display the **Search** and **Create** links in the left navigation bar.
3. Click **Create** to display a form to define a new room or equipment item. Click **Search** to find an existing room, equipment item, or employee that you can edit. If you are creating a new resource, the Rate Template link will appear on the left menu after you save the resource.
4. Click the **Rate Template** link to display the ***Rate Template*** page. The **Default-Hourly** template will appear at the top of the page.
5. Enter a name and select a rate type for a new template at the bottom of the page, and click **Add** to create a new rate template. The new template will appear in the list at the top of the page. You can add a resource rate amount before you add the template to the list. To edit a template, click the **Edit** icon to the left of any listed template at the top of the page.
6. Click **Save** before exiting the page.

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TAB 11:

Attachments

Use attachments to provide additional information, such as overviews, critiques, and abstracts, learning objectives, for the following objects:

- Lesson Templates and Lessons
- Products
- Users
- Manufacturers and vendors
- Inventory items
- Itineraries
- Locations and facilities

To add an attachment:

1. Click on the Attachments link in the left sidebar. This will display all attachments already added.
2. Click **Add to List** in the lower half of the screen.
3. Enter attachment name and any search criteria.
4. Select the appropriate item to attach.

NOTE: This process is the same for the object listed above. So in order to add an attachments to a product, you must first navigate to that product, either create it or edit it, then the Attachments link in the sidebar will be available.

TAB 12:

Using the Equipment Resource Calendar

To use the equipment resource calendar in the LMS:

1. Select **Resources** in the **Go to:** drop-down list
2. Click **Equipment** on the menu to display the **Search** link in the left navigation bar.
3. Enter search criteria in the fields in the left sidebar and click **Search** to find an existing equipment resource.
4. Click the Edit icon next to a resource listing.
5. Click **Calendar** on the left menu to display the calendar.
6. Use the following controls to add or find an event:

View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time zone	Change the calendar display to show events in different time zones. The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to reflect the new time zone.
Add New Event	Use this functionality to schedule known events for the resource that would make it unavailable for regular scheduling (e.g., maintenance work). Select an event type to display the Event Detail page. The Event type has a Start Date, and the All Day Event also contains an end date.
Show Date	Selecting a date from the pop-up calendar and then clicking **Go** will display that date in the main calendar.

7. Click **Save** when finished if adding or editing an event.

TAB 13:

Viewing Audit Trails

The audit trail list the modifications made to the LMS item. It lists the user who changed it and the attributes along with the date and time.

TAB 14:

Notes

Notes can be added to any object in the LMS. The LMS maintains a history of all the notes that have been entered for an object.

In addition, to enable more efficient searches for notes, you can define categories and assign these categories when entering notes. For example, you could define categories such as **Phone conversations**, **Meetings**, **Demos**, **E-mails sent**, and **E-mails received** for the notes you enter.

TAB 15:

Recording Ad Hoc Learning

In addition to marking completion for catalog items that learners have purchased/ordered, the LMS supports marking completion of catalog items without having purchased/ordered the items. Known as recording ad hoc learning, this procedure creates an entry directly in the ***Transcript*** page of the learners for whom the learning was recorded.

Ad hoc learning can be recorded by Learning Approvers and managers.

Note: Recording ad hoc learning and marking completion for purchased/ordered items are not related procedures. If a learner has ordered an item and ad hoc learning is recorded for the learner for the same item, the item will appear in both the learner's ***Transcript*** and ***Registrations*** pages.

If the item in their enrollments is then marked complete (either by their manager or by any content associated with the item), the item will appear twice in their transcript.

TAB 16:

Viewing Online Test Results

Instructors can view the results of online tests associated with a lesson by clicking a link in the **Online Tests** column on the ***Grade Lesson*** page. This can be useful when grading a learner. Results for the entire lesson can be viewed by clicking the **Grade by Question** link, or results for each learner can be viewed by clicking a **Grade by Learner** link.

To view online test results:

1. Follow this path to display the ***Grade Lesson*** page:

   View (in **Roster** column) □ **Grade Entire Lesson**

2. Click a link in the **Online Test** column to display either the ***View by Test*** or ***View by Learner*** page.

TAB 17:

Marking a Lesson Complete

Marking completion of a catalog item for a learner triggers the moving of the catalog item from the learner's ***Registrations*** page to the learner's ***Transcript***.

Marking an item complete consists of:

- Indicating success or non-success:
  - If an item is marked complete ***with success***, the LMS credits the learner's profile with any competencies or supported knowledge associated with the item.
  - If the item is marked complete ***without success***, the competencies and supported knowledge are not granted to the learner.
- Specifying the completion date
- Optionally reporting an overall score

To Mark a Lesson Complete following these steps:

1. Choose Lessons from the drop-down in the top right corner
2. Enter search criteria to find the lesson you want to mark complete and click Go.
3. Select the Edit icon; the Lesson main frame will appear.
4. In the Left Navigation Pane click Roster.
5. Click the Grade Entire Class link.
6. Under **Success?**, you can mark the entire class as complete or each individual learner. Click the radio button under Mark All as Yes or No or select the Yes/No radio buttons for the individual learner. You would choose to mark success for the entire class if all the learners had successfully completed the lesson.
7. Next mark the scores for learners in the class. You may mark the same score for the entire class (if all learners earned the same grade), or you may mark each grade individually. To give the same grade to everyone, mark the grade in the blank and press the down arrow. To give a grade to each learner individual, place the grade in the blank in the row aligning to each learner.
8. Click Save

TAB 18:

Accessing Chat Rooms

There are two ways to access a chat room:

- You can access a chat room for a catalog item once an order for a catalog item is set to **confirmed**.

Note Chat rooms are not available for **unconfirmed** orders.

- You can access a chat room for every community in the system.

Accessing a Chat Room for a Catalog Item

A chat room group for a catalog item can be accessed by learners from:

- The Registrations page
- The Transcript page

To access a chat room from the Registrations or Transcript page:

1. Click the **My Development** tab on the top navigation bar.
2. Click the **Registrations** link on the left-hand sidebar. The Registrations page displays all the catalog items for which you are currently enrolled.

OR

Click the **Transcript** link on the left-hand sidebar. The Transcript page displays all the catalog items you have completed.

3. The **Chat** icon is displayed in the **Action** column. Each catalog item has a separate chat group. To access a chat group for a particular catalog item, click the **Chat** icon next to the catalog item in which you are interested.

Accessing a Chat Room for a Community

To access a chat room for a community:

1. Click the **Collaboration** tab.
2. Click the **Personal Communities** link.
3. Click the name of a community for which you want to see a chat group.
4. In the **Community actions** row, click the **Chat Room** link to open the Chat window.

Communicating with Experts in a Community

In the Community Detail page, in the list of community experts, a **Chat** icon is displayed next to the names of community experts. When a community expert is in the chat room, the icon next to the expert's name is active. Click the icon to access the chat room.

TAB 19:

Discussions

Discussion is the LMS component that provides a persistent communication channel for interacting with other users. Discussions are available for every:

- Catalog item.
- Community.

Discussion groups for Catalog Items

Each catalog item in the system has a discussion group associated with it. Learners can access the discussion group for a catalog item after their order for the item is confirmed. Learners can discuss any number of topics / subjects for a catalog item. Each discussion group maintains a complete history of the communication between users who participated in the discussion. Discussion groups remain available after catalog items are completed.

Discussion Groups for Communities

Each community in the system has a persistent discussion group associated with that community. The discussion group for a community is available to all learners who are watching the community or are an expert for the community. A discussion group is available as long as the community exists.

For more information about the tasks you can perform in discussion groups, see the Discussion help.

TAB 20:

Accessing Discussions

There are two ways to access a discussion group:

- You can access a discussion for a catalog item once the order for the catalog item is set to **confirmed**.

Note Discussion groups are not available for **unconfirmed** orders.

- You can access a discussion group for every community in the system.

Accessing a Discussion Group for a Catalog Item

A discussion group for a catalog item can be accessed by learners from:

- The Registrations page
- The Transcript page

Note You can access a discussion group for a catalog item only if the status of your order is set to **confirmed**. Discussion groups are not displayed for unconfirmed orders.

To access a discussion group from the Registrations or Transcript page:

1. Click the **My Development** tab on the top navigation bar.
2. Click the **Registrations** link on the left-hand sidebar. The Registrations page displays all the catalog items for which you are currently registered.

OR

Click the **Transcript** link on the left-hand sidebar. The Transcript page displays all the catalog items you have completed.

3. The **Discuss** icon is displayed in the **Action** column. Each catalog item has a separate discussion group. To access a discussion group for a particular catalog item, click the **Discuss** icon next to the catalog item in which you are interested.

For more information about the tasks you can perform in discussion groups, see the Discussion help.

Accessing a Discussion Group for a Community

To access a discussion group for a community:

1. Click the **Collaboration** tab.
2. Click the **Personal Communities** link.
3. Click the name of a community for which you want to see a discussion group.
4. In the **Community actions** row, click the **Discussion Board** link to open the Discussion Group window.

For more information about the tasks you can perform in discussion groups, see the Discussion help.

TAB 21:

Shippable Products

Shippable products are physical goods that must be shipped to the learner to deliver the learning (e.g. printed material, video cassette, CBT on CD-ROM).

Shippable products have the following attributes:

- Appropriate physical product category (e.g. Book, Video, CBT).
- One or more locations and quantities at each location.

If no quantity exists at any locations, the product can be ordered; however it goes into a back-ordered state. A back-ordered product cannot be marked shipped or delivered until a quantity is available for shipment at a location for the product.

- Typically, a shippable product does not have content associated with it. The content is contained within the actual product shipped.

When a shippable product is ordered, it appears in the ***Registrations*** page for the learner who ordered it (regardless of whether the learner is a group administrator or not).

All learners can order quantities of shippable products through the LMS.

Locations for Shippable Products

You can assign a shippable product to one or more locations and specify the quantity at each location. Assigning a product to a location enables the product to be shipped from the location to fill orders.

The total quantity for all locations equals the available quantity for the product; however, the system also tracks the quantity of products that have been reserved for orders. When the product is shipped to fill an order, the quantity reserved and the available quantity both are decremented.

Delivery of Shippable Products

The LMS provides functionality for shipping products to Learners, and for tracking those shipments. When you create a shipment for an order, you specify a location from which the ordered products are shipped.

TAB 22:

View Your Team (Direct Reports)

Learning Approvers can view the profiles of each member (subordinates) of their team and carry out actions as described in the table below. The pages are displayed by selecting each item from a drop-down menu next to the team member's name.

You can add subordinates by clicking the "Add Direct Reports" link in the left navigation bar in the My Team module.

Menu Item	Page Description
Registrations	Allows you to view registrations for a team member and mark them complete.
Transcripts	Allows you to view transcripts for a team member.
Skills	Allows you to view the current skills for a team member. You can also view a skill's history and add a new skill for the member.
Skills Gap	Allows you to view the skills gap for a team member by job type.
Development Plan	Allows you to view the development plan for a team member and to add tasks and learning resources for the member.
Course	Allows you to view, add, or delete courses for a single team member. You can see all your team members' courses by clicking the **Courses** tab. You can also assign and grant courses on this page.
Individual Training Plan	Allows you to view courses for a team member by job type.
Job Profile	Allows you to view job roles for a team member.

TAB 23:

Adding Resource Types and Assigning Resources to Lesson Templates

Each lesson template can have one or more resource types assigned to it. These resource types are inherited by default by lessons created for the lesson template. For example, every lesson needs an instructor to deliver the lesson. To help make scheduling of lessons easier, you can specify a resource type of `Employee' to each lesson template you create.

In addition, you may choose to assign a specific resource to a lesson template. For example, for a particular lesson template, you may want to designate a particular person as an instructor for the lesson template. When a lesson is created for the lesson template, this person is automatically scheduled as the instructor for the lesson and, as a result, is unavailable for other lessons at the same time or overlapping times, including other lessons created for the same lesson template. You can always change the instructor for the lesson or add more instructors as `Employee' resources for the lesson.

You can both add a resource type and assign specific resources in one step, or only add a resource type and later edit the lesson template to assign specific resources.

Note Any employee is eligible to be a resource, such as an instructor, but people also can be designated as qualified instructors.

For more information, see TAB 24: "Designating Qualified Instructors for a Lesson Template" and TAB 39: “Assigning Resources to Lesson Iterations”.

TAB 24:

Designating Qualified Instructors for a Lesson Template

All employees designated as resources in the LMS are eligible to teach lessons; however, for each Lesson Template in the LMS, you can designate one or more employees as qualified to teach lessons for the lesson template. In addition, for each employee designated as a qualified instructor for the lesson template, you can enter a number that indicates their priority level for the lesson template.

Designating employees as qualified instructors (for lesson template) does not prevent other employees from being used as instructors. It simply enables managers, when searching for employees to serve as instructors for a lesson, to limit their search to employees who are qualified to teach the lesson template for the lesson. They can further refine their search using the priority levels for qualified instructors.

Tip: When assigning priority levels to qualified instructors, you can use any numbering scheme (e.g. ascending, descending); however, you should assign the priorities consistently to enable more accurate and precise searches.

Employees can be designated as qualified instructors for a lesson template when creating or editing the lesson template in the **Catalog** module in the LMS.

In addition, when creating/editing an employee in the LMS, you can specify one or more lesson templates that the person is qualified to teach; however, you cannot specify a priority level for the employee for each lesson template.

To designate qualified instructors for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Lesson Template** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the **Instructor** link on the sidebar to display the ***Instructor*** page.
5. Enter search criteria in the Instructor field and click Finder icon, or simply click **Finder icon** to list all instructors. **Warning:** The time involved could be considerable.
6. Clicking the Finder icon will display a User Finder window. This window allows you to search on seven fields.
7. Click the + symbol next to a name to list it at the top of the page. You can add multiple names.

Note This procedure only designates a person as a qualified instructor for the lesson template; to assign them as a resource that will be inherited by lessons, use the **Resources** link for the lesson template. (See TAB 23.)

TAB 25:

Viewing Content Associated with Lesson Template

The LMS supports the ability to deliver online learning content captured in a variety of formats. Some learning content is provided in formats that enable the LMS to inter-operate with the content and record the results of a learner's performance. This type of content includes standards-based content, such as AICC and SCORM, as well as proprietary content from leading content vendors such as NETg, SkillSoft, and SmartForce. Other types of content that can be delivered by the LMS include any file that uses a standard MIME type, any URL, and packages of files such as an HTML site.

In the LMS, all learning content is imported, stored, and managed in the LMS Content repository. Using the ***Content*** module, content administrators can publish content to the Training Catalog for access by learners.

Note Catalog administrators working in the ***Catalog*** module cannot capture learning content or associate learning content with Lesson template.

When publishing content to the Training Catalog, content administrators can publish content to existing lesson templates, lessons, or products, or they can publish to new lesson templates, lessons, or products.

Important Each catalog item can have only one content object associated with it.

For complete information about using the LMS Content repository to capture, manage, and publish learning content, see the online help for the ***Content*** module.

To define expenses for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Lesson Template** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit and click on the edit icon.
4. Click the **Associated Content** link to display the ***Associated Content*** page. Any content associated with this lesson template will be listed.

TAB 26:

Defining Expenses for a Lesson Template

To define expenses for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Lesson Template** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit. Click on the edit icon.
4. Click the **Expenses** link to display the ***Expenses*** page
5. Select an expense type from the drop-down list.
6. Enter an expense description, and numeric values for the unit cost and quantity. Select a date using the Calendar.
7. Click the **Add** button to list the expense at the top of the page.

Note: Expenses added at the lesson template level will default to lessons as Budgeted Expenses.

TAB 27:

Specifying Prerequisites for a Lesson Template

To specify other catalog items as prerequisites for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Lesson Template** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the **Prerequisites** link to display the ***Prerequisites*** page.
5. Select a category from the drop-down list and click the **GO** button.
6. Enter search criteria and click the **GO** button to display a list of catalog items that can be added as prerequisites for the lesson template.
7. Click the + icon next to an item to list it at the top of the page. When you click the icon, use the appropriate icon to specify whether to add the item as recommended or required.

TAB 28:

Specifying Equivalents for a Lesson Template

To specify other catalog items as equivalents for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Lesson Template** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the **Equivalents** link to display the ***Equivalents*** page.
5. Select a group and a category from the drop-down list and click the **GO** button.
6. Enter search criteria and click the **GO** button to display a list of catalog items that match your criteria.
7. Select the check box next to each item and click the **Done** button to list it at the top of the page.

TAB 29:

Assigning Skills to a Lesson Template

Skills assigned to a lesson template are granted to learners who successfully complete a lesson for the lesson template (or if the lesson template is marked complete for the learner). When a skill is assigned to a lesson template, you also specify the proficiency level that will be granted to learners when they complete the lesson template.

To assign skills to a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list
2. Click **Lesson Template** on the menu.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the **Skills** link in the left sidebar to display the ***Skills*** page.
5. Select a skill group from the drop-down list.
6. Find a skill using the Finder.
7. Select the proficiency that will be granted for the skill when the lesson template is successfully completed by a learner.
8. Click the **Add** button to list the skill at the top of the page.

You can delete any listed skill by clicking the delete icon to the right of the listing.

TAB 30:

Specifying Keywords for a Lesson Template

Keywords can be used as criteria when searching the catalog for catalog items.

To specify keywords for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Lesson Template** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the **Keywords** link to display the ***Keywords*** page.
5. Select a keyword from the drop-down box.
6. Click the **Add** button to list the keyword at the top of the page. You can assign multiple keywords by repeating this process.

TAB 31:

Defining a Checklist for a Lesson Template

To define a checklist for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Lesson Template** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the **Checklist** link to display the ***Checklist*** page.
5. Select a subject from the drop-down list and enter a number of days. You can also add notes into the text field.
6. Click the **Add** button to list the checklist at the top of the page.

TAB 32:

Course Overview

Courses are completed and certificates are awarded when it has been deemed that the learner has demonstrated mastery in a subject area. Learners complete a course and acquire a certificate by completing one or more learning items, and any prerequisites needed. Completing the last item triggers the completion of the course and acquisition of the certificate. The use of prerequisites allows you to specify that learning items are completed at a particular time as part of the acquisition process.

Courses must be completed by completing items within a specific time period. This ensures that the knowledge is current and fresh in the learner's mind. This acquisition period, in addition to the other time period controls, gives you flexible control over when learners must complete items to stay in compliance. Coupled with the ability to set an expiration date for courses, you can determine their useful life and if a new version is needed.

Courses can be assigned to learners either directly or through the roles associated with them. You can define groups of learning items that a learner must complete to be recognized as holding a credential. For example, an education services operation specializing in the software industry could offer certifications in Database Management, Web Design, and Unix-based Programming. Each of these courses could require a different set of the learning items offered by the organization.

The LMS is designed to support full and constant compliance with course requirements. The system automatically updates changes concerning MOS/Career Fields, roles, courses, and learner profiles that are made by the system, administrators, managers, and learners. In addition, whenever a learner completes a learning item or acquires a course, the system checks all other courses assigned to the learner to see if the completion changes the status. These processes serve the need of learners to be constantly in compliance with all courses required by their MOS/Career Field or roles, or by managerial requirements.

The system helps administrators design courses by providing a flexible structure for building them. It also supports learners' tasks of acquiring courses and then re-certifying by providing periodic and triggered notifications. Business rules that govern general business practices related to courses add further flexibility.

For more information, see:

- See TAB 33: **Re-Certification**
- See TAB 34: **Course Structure**

TAB 33:

Re-certification

Rather than requiring learners to repeat the entire course after they complete it and want to keep it current, you can create a re-certification version that contains refresher information. In this case, one version would contain all of the learning items required to complete the course, and another version would contain only those learning items required to update and maintain the certification received from completing the course.

You can define courses to be valid for a specified time frame. At the end of that time frame, the course will expire unless the learner re-certifies. By marking versions for re-certification, you ensure that only those learners who had previously attained the certification for that course can use that version.

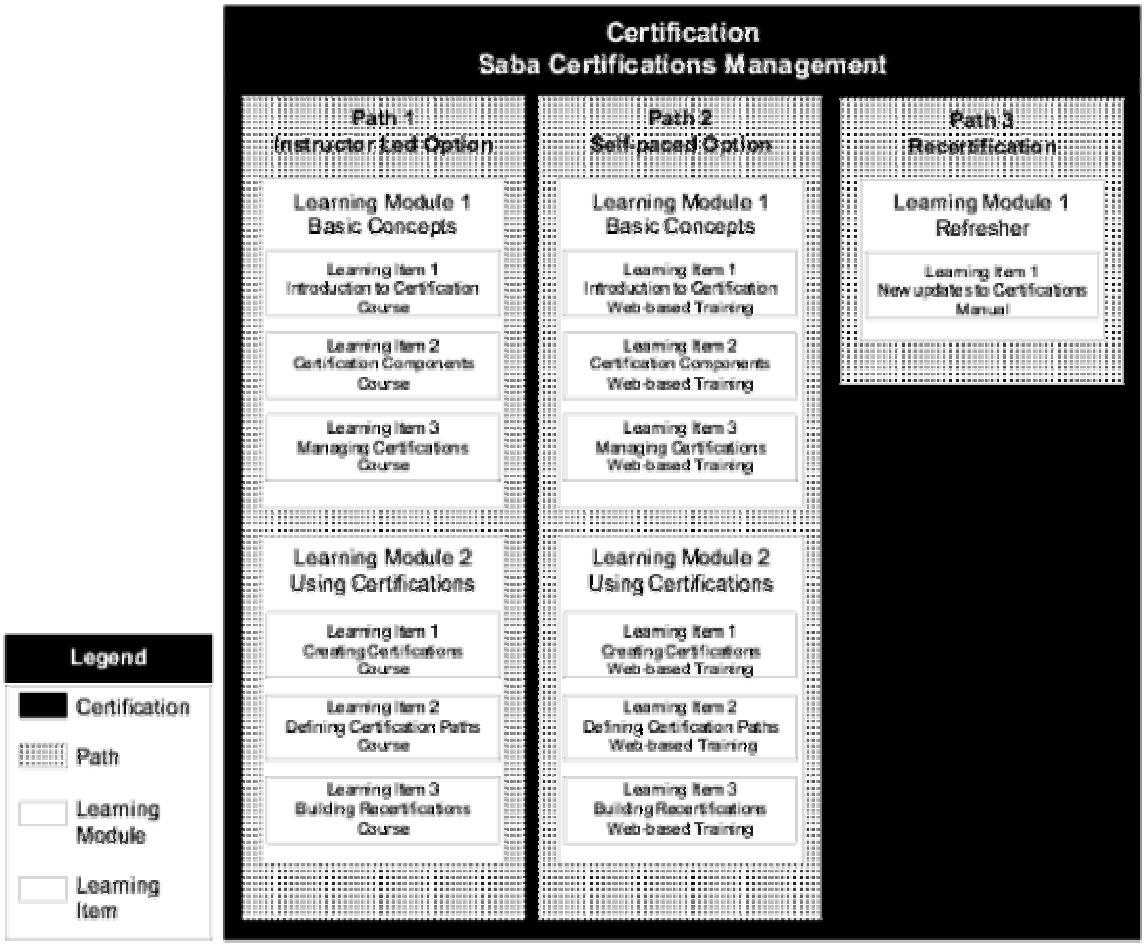
When completing a course for the first time, learners must take a version that is not marked for re-certification. In order to stay in compliance, once a course is complete, as long as it is valid it must be re-acquired through re-certification.

TAB 34:

Course Structure

Courses have a hierarchical structure of components. The highest level is the course itself. Within the course are one or more paths (or phases). Each path is equivalent in that a learner can complete the requirements of any one path to complete the course. Each phase contains modules which are groupings of learning items to be completed. You can specify the number of items learners are required to complete in each module.

The *Sample Course Structure* graphic shows a course's components. In this example, the course offers three different versions-two for the initial course (one containing classroom-based learning items, one containing self-paced learning items) and one for re-certification (containing only a manual). Each version for the initial course contains two modules with three learning items, while the re-certification path contains only one module with one learning item.



Each component is explained in detail in the following sections:

- See TAB 35: **Modules** and TAB 36: **Learning Items**

TAB 35:

Modules

Modules are sets of catalog items within a version. You can define the number of items in each module the learner is required to complete. This allows you to give the learner more choices. For example, if your organization offers a particular product in multiple formats (classroom-based, web-based, and video) you could create a module that contains that item in all three formats. You would require the learner to complete only one item from that module. In this way, each learner receives the same information, but can choose how to receive it. Alternatively, you could define a module with three related courses at the same level and require learners to take two out of the three.

You can mark modules required or optional. Learners ***must*** complete the specified number of products in each required module. Optional modules allow you to create a grouping of reference products that are not required, but are helpful to the learner, such as study guides, manuals, or practice tests.

TAB 36:

Learning Items

Learning items are the individual products or lessons that the learner must complete to complete the course. You can include lessons, other courses, tests, and other types of catalog items, such as manuals and videos.

TAB 37:

Multi-Language Objects

For some objects, Saba provides the ability to define and store multiple language translations for each user-defined value.

For example, when defining courses, the information you define is initially associated with your default locale. By clicking the internationalization icon at the top of the window (in Saba Client) or the **Internationalization** link (in Saba Web). You can also enter parallel values for each additional locale defined in the system.

The internationalization icon (in Saba Client) is shown below:

If you do not enter translation values for the additional locales defined in the system, another user can do so later. Or, another user can modify the translation values you entered.

When you view a multi-language object, the system displays the values defined for the language associated with your default locale. If the translation for your locale is not available, the system displays the value in the language in which it was originally defined.

Supported Objects for Internationalization

The table below lists the Saba learning objects that support the ability to store user-defined values in multiple languages:

Object	Attributes Supporting Multiple Languages
Courses	Course Title Description
Product Groups	Name
Curricula	Name Description
Products	Name Description
Resource Inventory Items	Name Description
Resource Categories	Name

	Description
Certifications	Name Description
Competencies	Name Description
Competency Types	Name Description
Competency Proficiencies	Name Description
Transportation Categories	Name

TAB 38:

Specifying Languages for a Lesson Template

To specify languages for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Lesson Template** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click the **Language** link to display the ***Languages*** page.
5. Enter a language name in the text box and click **Find** to display a list of languages, or simply click the **Find** button to list all available languages.
6. Click the + symbol next to a name to list it at the top of the page. You can add multiple names.

You can delete a language by clicking the red trash can icon next to listed name.

Note You cannot delete the language that is specified as the default language for the lesson template. To delete the language that is specified as the default, you must first specify another language as the default for the lesson template.

TAB 39:

Assigning Resources to Lesson Iterations

To assign a resource to a lesson iteration in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list
2. Click **Lesson tab** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. To find the lesson iteration to which you wish to assign a resource, enter a search criterion or click **GO** to display all lesson iterations.
4. Click the EDIT icon for the lesson iteration to add a resource.
5. Click **Resources** in the sidebar to display the ***Resources*** page.
6. Select a resource type from the drop-down list to display the ***Add a Resource:*** page.
7. Enter required information:

Required Information	Description
Purpose	Select a purpose using the drop-down list.
Resource Subtype	Select a subtype using the drop-down list.

8. Select the picker tool next to the Name box to find the resource you desire.
9. Enter the search information and select Go to return a list of possible resources. Note: if you are searching for "employees," you can select the check box for "Qualify for Lesson" to return only those Instructors, SMEs, etc who are qualified to association with the lesson.
10. Click "+" next to the resource you want; this will automatically populate additional fields in the Resources page.

To delete the resource simply click the trash can icon in the same row as the resource.

TAB 40:

Recording Budgeted Expenses

When you create a course, you can assign budgeted expenses to the course. These expenses then become the default budgeted expenses for all classes based on the course. After you create a class, you can manually add additional budgeted expenses for each class.

Note Budgeted expenses and actual expenses are independent of each other. You can manually convert a budgeted expense to an actual expense any time in the life-cycle of a class (i.e. you can convert the expense before or after the class is delivered).

To record budgeted expenses in Saba Web:

1. Select **Classes** in the **Go to:** drop-down list
2. Click **Class** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create or find an existing class.
4. Click **Budgeted Expenses** in the sidebar to display the Budgeted Expenses page.
5. Select an expense type from the drop-down list.
6. Enter required information:

Required Information	Description
Expense Description	Enter a description for the expense.
Unit Cost	Enter a cost for the expense
Quantity	Enter a quantity.
Total Amount	The amount is entered by the system after you enter values into the unit cost and quantity fields.
Date	Select a date using the picker tool.

7. Click the **Add** button to list the expense at the top of the page. You can delete the expense by clicking the delete icon at the right of the line item.

TAB 41:

Recording Actual Expenses

Actual expenses can be created manually for each class. They are also created automatically by the system for any actual and specific resources assigned to a class when the class is marked `Delivered'. For example, if an actual resource is assigned to a class and the resource has a flat rate of $100, an actual expense of $100 is created automatically when the class is marked `Delivered'. If the resource has an hourly rate, Saba automatically calculates the expense based on the hourly rate multiplied by the number of hours in the class.

To record actual expenses in Saba Web:

1. Select **Classes** in the **Go to:** drop-down list
2. Click **Class** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create or find a class.
4. Click **Actual Expenses** in the sidebar to display the Actual Expenses page.
5. Select an expense type from the drop-down list.
6. Enter required information:

Required Information	Description
Expense Description	Enter a description for the expense.
Unit Cost	Enter a cost for the expense
Quantity	Enter a quantity.
Total Amount	The amount is entered by the system after you enter values into the unit cost and quantity fields.
Date	Select a date using the picker tool.

7. Click the **Add** button to list the expense at the top of the page. You can delete the expense by clicking the delete icon at the right of the line item.

TAB 42:

Creating and Managing Lessons

The tasks associated with creating and managing lessons include:

- See TAB 43: Creating Scheduled Lessons
- See TAB 52: View Lesson Detail (Edit Information)
- See TAB 53: Adding Scheduled Lessons in Batch Mode
- See TAB 54: Cloning a Lesson

TAB 43:

Schedule and Edit Lesson Iterations

Schedule Lesson Iterations

Scheduled lessons are created and maintained in the **Lessons** module in the LMS. Students are registered for scheduled lessons through orders created in the **Registrar** module (manager) or **My Home** (learner self-registration). These same steps are used to create all instructional units (except products) with courses.

To schedule a lesson in the LMS:

1. Select **Lessons** in the **Go to:** Drop-Down list.
2. Click **Lesson** on the menu and click the **Create** link in the left sidebar to display a form to define a new lesson.
3. Enter the ***required*** information needed to define the lesson.

Required Information	Description
Lesson Number	Auto-generated based on Lesson Template.
Lesson Template	Use the Finder to select the appropriate lesson template for the lesson. Lesson Templates are created in the Catalog Go-to: module list.
Location	Use the Finder to select a location for the lesson. **Note** This field is disabled if the `Location/Facility Relationship' business rule is enabled. When you select a facility for the lesson, the location for the facility is automatically entered in this field.
Facility	Use the Finder to select a facility for the lesson. **Note** This field is required only if the `Location/Facility Relationship' business rule is enabled. If the business rule is disabled, this field is optional.
Start Date	Use the Calendar to select a start date for the lesson.
End Date	Auto-generated based on Start Date and Session Template
Session	Use the Finder to find and select a session template for the lesson.

Template	A session template is the weekly schedule that the lesson iterations is taught. It can be consecutive days and times, or it can non-consecutive days and times. For example, Monday - Friday 0900 to 1700 would be a session template. As would, Monday 1000 to 1200 then Thursday 1300 to 1500. These templates can also be created using the same steps described in the following link while scheduling a lesson. There is a link by Session Template field that allows you to create a weekly session template. For more information about Weekly Session Templates, see TAB 44: Creating a Weekly Session Template
Lesson Type	Select a lesson type from the drop-down list. This is information only.
Delivery Type	Select a delivery type from the drop-down list. This is information only.
Min Count	Enter the minimum number of students for the lesson.
Max Count	Enter the maximum number of students for the lesson.
Max in Waiting List	Enter the maximum number of students who can be added to the lesson waiting list.
Max Discount	This field is not being used; enter a "0" if the field is required.
Language	Select the lesson language from the drop-down list. Lessons can have more than one language. After the lesson is saved, a link, Language, is displayed on the left. Using this link, you can enter additional languages in which the lesson is offered.

4. Enter any ***optional*** information for the lesson:

Optional Information	Description
Display for call center	Select this check box to display the lesson in the Product Catalog for registrars.
Display for web	Select this check box to display the lesson in the Product Catalog for learners, managers, and group administrators.
Available	Select this check box to make the lesson available for ordering.
Internal	Select this check box to designate the lesson as for users.
External	Functionality not used. Should be left checked.

Security Domain	Select a security domain for the lesson from the pick list in the Security Domain field.
<Custom Fields>	Enter information in any custom fields that have been defined.

5. Click **Save** to save your information and to schedule the lesson.

Edit Lessons

After you have scheduled the lesson, event, or instructional unit, you may edit the specified attributed or add additional information. To edit:

1. Select **Lessons** in the **Go to:** drop-down list.
2. Click the **Lesson tab** and click the **Search** link in the left sidebar.
3. Enter the search criteria and press Go.
4. Find the desired lesson and click the Edit icon.
5. You can edit the information on the main page using the drop-down list above the main page information.
6. You can edit additional information (e.g., attachments, prerequisites) using the left sidebar links.

TAB 44:

Creating a Weekly Session Template

To create a weekly session template in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list.
2. Click **Session Template** on the menu and click the **Create** link in the left sidebar to display a form to define a new session template.
3. Select the **Weekly** radio button to specify the template as a weekly session template. The LMS enables the No. of Weeks field.
4. Enter the ***required*** information needed to define the session template.

Required Information	Description
Session Template Name	Enter a name for the template in the Template Name field. **Tip** Enter a descriptive name so you and other users can easily identify the template. For example, you could use `TTH(6-9)' for lessons that are held Tuesday and Thursday, 6 pm to 9 pm.
No. of Weeks	Enter the number of weeks for the session template.

5. Click the **Create** button to list the session at the bottom of the page.
6. Enter the ***required*** information needed to define the session.

Required Information	Description
Name	Enter a name for a session.
Day	Select the day of the week from the drop-down list.
Start Time	Use the Time icon to enter a start time.
End Time	Use the Time icon to enter an end time.

7. Select the check box if this is the first session of the template. Click **Add** to add the session to the template. The LMS automatically displays the number of weeks you specified for the session template and adds the session to each week.

To add additional sessions to the template, repeat these steps.

To change the information for a session, select the session and change the desired information in the fields, then click **Update**. The LMS automatically refreshes the display to reflect your changes

Tip To quickly and easily add another session that is similar to the last added session, simply enter a different session name, change the desired information (day of the week or start and end times), then click **Add**.

8. Click **Save** to save your information and to create the template.

After the system creates the item, links to the following page is displayed:

Page	Description
Notes	Notes (*See* TAB 14.)

TAB 45:

Viewing Content Associated with Products

The LMS supports the ability to deliver online learning content captured in a variety of formats. Some learning content is provided in formats that enable the LMS to inter-operate with the content and record the results of a learner's performance. This type of content includes standards-based content, such as AICC and SCORM, as well as proprietary content from leading content vendors such as NETg, SkillSoft, and SmartForce. Other types of content that can be delivered by the LMS include any file that uses a standard MIME type, any URL, and packages of files such as an HTML site.

In the LMS, all learning content is imported, stored, and managed in the LMS Content repository. Using the Content module, content administrators can publish content to the Training Catalog for access by learners.

Note Catalog administrators working in the Catalog module cannot capture learning content or associate learning content with products.

When publishing content to the Training Catalog, content administrators can publish content to existing lesson template, lessons, or products, or they can publish to new lesson template, lessons, or products.

Important Each catalog item can have only one content object associated with it.

For complete information about using the LMS Content repository to capture, manage, and publish learning content, see the online help for the Content module or the LMS *Content Administrator Guide*.

To view content associated with a product in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu, enter criteria in the search fields, and click the **Go** button in the left sidebar to display a list of products you can edit.
3. Click the **Associated Content** link in the left sidebar to display the ***Associated Content*** page.
4. Click the title of a piece of content to view its details.

TAB 46:

Assigning Skills to a Product

Skills assigned to a product are granted to learners who successfully complete the product. When a skill is assigned to a product, you also specify the proficiency level that will be granted to learners when they complete the product.

To assign skills to a product in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu.
3. Create a product or find an existing product that you can edit.
4. Click the **Skills** link in the left sidebar to display the ***Skills*** page.
5. Select a skill group from the drop-down list.
6. Find a skill using the Finder.
7. Select the proficiency that will be granted for the skill when the product is successfully completed by a learner.
8. Click the **Add** button to list the skill at the top of the page.

You can delete any listed skill by clicking the delete icon to the right of the listing.

TAB 47:

Specifying Prerequisites for a Product

To specify other catalog items as prerequisites for a product in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu.
3. Create a product or find an existing product that you can edit.
4. Click the **Prerequisites** link in the left sidebar to display the ***Prerequisites*** page.
5. Select a product type from the drop-down list box and click the **Find** button to list catalog items at the bottom of the page.
6. Click the **+** icon next to a product to list it at the top of the page as a prerequisite. They can be added as either required or recommended.

You can delete any listed prerequisite by clicking the delete icon to the right of the listing.

TAB 48:

Specifying Equivalents for a Product

To specify other catalog items as equivalents for a product in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu.
3. Create a product or find an existing product that you can edit.
4. Click the **Equivalents** link in the left sidebar to display the ***Equivalents*** page.
5. Select an equivalents group and category from the drop-down list boxes and click the **Find** button to list equivalents at the bottom of the page.
6. Select one or more check boxes next to listed items and click **Done** to list the items at the top of the page.

You can delete any listed equivalent by clicking the delete icon to the right of the listing.

TAB 49:

Specifying Keywords for a Product

To specify keywords for a product in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu.
3. Create a product or find an existing product that you can edit.
4. Click the **Keywords** link in the left sidebar to display the ***Keywords*** page.
5. Select a keyword from the drop-down list box and click the **Add** button to list the keyword at the top of the page.

You can delete any listed keyword for the product by clicking the delete icon to the right of the listing.

TAB 50:

Viewing Courses Associated with Products

Courses can contain products that learners need to complete to acquire the course. To view courses associated with products in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu.
3. Create a product or find an existing product that you can edit.
4. Click the **Courses** link in the left sidebar to display the ***Courses*** page. Any courses associated with this product will be listed.

Note Products are added to courses by using the **Courses** wizard.

TAB 51:

Assigning Inventory to Locations

Assigning an inventory location to a product indicates that the product is available at that location. When you assign a location to a product, you specify the quantity that is available at the location, as well as a reorder quantity. This process is also used for updating inventory quantities.

To assign one or more inventory locations to a product in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu.
3. Search for the product or inventory using the search criteria fields and click Go.
4. Click the Edit icon next to the item needed updating.
5. Click the **Inventory Locations** link in the left sidebar to display the ***Inventory Locations*** page.
6. You can either add inventory to a particular location or edit an existing inventory quantity.

   - **To add inventory**: Enter the location and quantity (required) and additional information (optional) and press the Add button.
   - **To update inventory**: Click the Edit icon. Use the Change drop-down list to edit the location, quantity, re-order quantity. To update the Work Bin Location, Bulk Bin Location, or Weight simply type over the existing entries and press Update. To return, click the Inventory Locations link in the left sidebar.

TAB 52:

View Lesson Detail

1. Select **Lessons** in the **Go to:** drop-down list.
2. Click **Lesson** on the menu and click the **Search** link in the left sidebar.
3. Enter Search criteria and click Go.
4. Find the desired Lesson and click the Edit icon.

- This will display the main lesson information and function links in the left sidebar.

Edit Main Lesson Detail

After a lesson is saved, a drop-down list appears at the top of the ***Lesson Main Information*** page that allows you to change some information or perform the following actions:

Information Changes:

- Change Security Domain
- Change Maximum Discount
- Change Language
- Change Facility
- Change Lesson Type
- Change Delivery Type

Actions:

- Mark Delivered
- Mark Archived
- Cancel Lesson

Because the information in these fields is read-only after the lesson is saved, this drop-down list provides a method to change the data. These are audited fields, so you must provide a reason for each change. The last three actions have no other input controls on the page, so the drop-down list and pop-up windows that appear after selecting an action from the list are the only method for carrying them out.

Note Once a lesson is canceled, it cannot be marked delivered or archived, and vice-versa.

See Also

See TAB 55: Cancel Lessons.

TAB 53:

Adding Scheduled Lessons in Batch Mode

Lessons in the LMS offers a tool, **Lesson Batch,** for quickly and easily adding multiple scheduled lessons in a single batch. Using Lesson Batch, you can also find out if there are any conflicts with other scheduled events, holidays, and other lessons.

Use Lesson Batch for the following scenarios:

- A lesson is to be held simultaneously at different locations.
- A lesson is to be repeated at one location on different dates.
- Several lessons need to be scheduled for several locations on different dates.

To use lesson batch scheduler in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list.
2. Click **Lesson Batch** on the menu and click the **Create** link in the left sidebar to display a form to define a lesson for batch scheduling. (You can also click **Search** to list lessons batches already saved.)
3. Enter the ***required*** information needed to define the lesson.

Required Information	Description
Lesson Number	This field is auto-generated based on the session template.
Facility	Select a facility using the picker tool. The location will default from the facility.
Start Date	Select a start date using the picker tool.
Lesson Session Template	Select a session template using the picker tool.
Security Domain	Select a security domain using the picker tool.

4. Enter any ***optional*** information for the lesson:

Optional Information	Description
Price	Enter a price for the lesson.
Currency	Select a currency using the picker tool.
Language	Select a language using the picker tool.
Internal	Select this check box to designate the lesson as intended for internal employees.
External	Select this check box to designate the lesson as intended for external employees.
Available	Select this check box to list the lesson in the catalog.

5. Click **Save** to save your information.

TAB 54:

Cloning a Lesson

To clone a lesson in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list.
2. Click **Lesson** on the menu to display the **Search** link in the left navigation bar.
3. Click **Search** to find an existing lesson that you can edit.
4. Click the **Clone** button at the bottom of the sidebar.
5. Change any information desired.
6. Click **Save** when finished.

TAB 55:

Cancel Lessons

The LMS supports canceling scheduled lessons and registrations for lessons.

Lessons can be cancelled by a provider any time before the lessons are marked delivered. Canceling a lesson cancels all the registrations for the lesson, as well as all the order lines for which lessons were requested. When a lesson is cancelled by a provider, no charges are incurred against the learners registered for the lesson.

Note Instructors can also cancel a lesson through the **Roster** link.

To cancel a lesson in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list
2. Click **Lesson** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Click **Search** to find an existing course that you can edit.
4. Click **Main** in the sidebar to display the ***Main Lesson Information*** page.
5. Select **Cancel Lesson** from the **Change:** drop-down list at the top of the page.
6. Enter a reason for the cancellation in the pop-up window.
7. Click **Save**. The cancellation date will be entered into the **Date Cancelled** field.

Warning This action cannot be undone

TAB 56:

Roster Seating (for Lesson Templates/Lessons)

1. Roster (i.e. reserved) seating allocates seats in a scheduled lesson for specific sets of users (e.g., specific units or Schools).
2. To establish your roster for the lesson, follow these steps:
3. Select Lessons from the Go-to: Drop-down list, then select the Lesson tab.
4. Create a lesson (enter all criteria and press save) or search for an existing one using the search criteria (click the Edit button to open the lesson if searching).
5. Select Roster Seating from the left sidebar.
6. Edit or Delete any existing Roster seating; or select Add under the New Roster Seating section.

6.1.1 Edit – click the Edit Icon

6.1.2 Delete – click the Trash Can icon

6.1.3 Add New – click New in the bottom section after you have specified the unit and quantity of seats to reserve. You do not have to specify a unit. If, for example, you only wanted 10 people to register, then simply put 10 in the Number Seats Reserved and press Add.

TAB 57:

Launchable/Downloadable Products

Launchable/downloadable products are non-physical goods (e.g. WBTs and Assessments) that are in electronic format and, as a result, can be accessed online or downloaded to a learner's local computer. Because they are in electronic format, you do not need to maintain an inventory that is decremented every time the product is ordered and shipped.

Electronic Categories for Products

A product is designated as launchable/downloadable by assigning it an electronic product category (e.g. the predefined category `WBT').

When a product has an electronic category, the product does not require shipment to be marked as delivered in the LMS. As a result, the product does not need to be assigned to locations.

In addition, launchable/downloadable products can be assigned directly to learners. When the learners complete the product, their profile can be updated to give them credit for the product.

In contrast, products that have a physical category (i.e. shippable products) must be manually marked as shipped and delivered before orders containing the product can be invoiced. As a result, the product must have a quantity available at a location to be shipped.

Online Access (Launchable Products)

Online-access, launchable/downloadable products, also known as web-based or online learning products, are delivered to individual learners through a network connection. The connection allows learners to access and interact online with the content for the product. Some examples include WBTs and streamed video.

If the content is AICC-compliant or from one of the content providers supported by the LMS, then the LMS tracks the progress and results of the learner.

Local Access (Downloadable Products)

Local-access launchable/downloadable products are items for which the actual content is a file attached to the products. The product is delivered to the learner by the learner downloading the content for the product from a server on a network to their local machine. The learner completes the content by accessing/interacting with the content on their local machine, disconnected from the server where the content originated. Some examples include electronic books, online videos, and CBT programs.

TAB 58:

Product Catalog Categories

Product catalog categories are used for two main purposes:

- Classifying products (items that appear in the Training Catalog).

Some examples of categories you may define for use with products include: CD-ROMs, CBTs, Videos, Books, Class Notes.

- Classifying resource inventory items (items used as resources in courses and lessons).

Some examples of categories you may define for use with resource items include: Class Notes, Books, Product Manuals, Notebooks, Note Pads, Pencils, Diskettes, and Collateral (i.e. items, such as t-shirts, coffee mugs, etc., that you give away in class).

Course and Package Categories

The **Course** and **Package** product categories are special categories that the LMS uses for displaying courses and packages in the Learning Catalog. These categories cannot be modified. In addition, they cannot be assigned to any products.

The LMS automatically assigns them to each course or package created by catalog administrators.

Additional Predefined Categories

The LMS provides some predefined product catalog categories (e.g., **Courses**, **Packages**, **WBT**, and **Assessment Tests)**. As a result, you do not need to create categories for these types of catalog items.

For all other resource inventory items and products that you wish to track in the LMS, you must create categories.

For more information about the predefined categories provided by the LMS, see TAB 59: "Predefined Records".

TAB 59:

Predefined Records

The following table lists the types of business objects for which the LMS provides predefined records. These records represent entities that are commonly found in education services operations. The records can be edited, deleted, or used as templates for creating similar records. The following table contains some example record types and values. This list is amendable and will change as needed.

Object Type	Record Type	Record (Value)
Category Definitions (Product Catalog)	Electronic	Assessment
	Physical	Book
	Physical	CD
	Physical	Instructor Kit
	Physical	Student Kit
	Physical	Video
	Electronic	WBT
Category Definitions (Equipment)	N/A	CD-ROMs
		Computer
		Floppy Disks
		LCD Projector
		Overhead Projector
		Slide Projector
		TV
		VCR
		Video Camera
		Video Tapes
Provider Types (Facility)	N/A	Internal Training Facility
		Media Production/Broadcast
		Rented Training Facility
		Vendor Training Facility
Session Templates	Ad-hoc	M-F 9-5
		M-Th 9-5
		M-W 9-5
		T-Th 9-5
		T-F 9-5
		W-F 9-5
		M, W, F 9-5
		T, Th 9-5
		M, W 9-5
		W, F 9-5
		M 9-5
		T 9-5

		W 9-5 Th 9-5 F 9-5

TAB 60:

Product Versioning and Expiration

The LMS supports versioning and expiration of products, primarily to support using products in courses.

Product completion entries, in contrast to lesson template/lesson completion entries, on the transcript have an additional field, **Expiration Date**, which stores the date a learner must complete the newest version of the product.

The course expiration date always reflects the nearest expiration date of the newest version of the required catalog items in the course. If the newest versions of the required elements have no expiration date, then the course expiration date reverts back to its default expiration period starting on the date that the learner completed the last required product or product update.

When a new version of a product is released which is required of certified or in-compliance learners, all previous versions are given an expiration date equal to the end of the grace period for the new version for all learners in the system.

If a learner has not completed the most recent version of a product, then the expiration date for that product is displayed on the course details page, as is the course expiration date, so that learners can determine which product to complete first and which one correlates to the current expiration date for the course itself. The message `Yes, complete new product version(s)' will appear in the **Need Re-certification** column.

Upon completion of the newest version of the product, the expiration date of older versions no longer matters since there is an entry for the newer version of the product on the learner's transcript that has no expiration date.

For additional information, see TAB 61: "Create a Product Versioning"

TAB 61:

Creating a Product Version

The product main page includes a version field. To modify this field:

1. Select Catalog from the drop-down module list.
2. Select the Product tab.
3. Search for the desired product. Click the Edit icon next to the product.
4. Select Version from the drop-down list above the main information page.
5. Change the version and enter the appropriate reason.

When any change is made in this field (including creation of the product) and the product record is saved, the following occur:

1. Information is audited and stored in the product record:
   - Revision date - entered by user
   - Authorizing person - entered by user - free text
   - Unique username of user making the change

   The LMS will assume that the user has updated the content attachment accordingly. The LMS will not store audit records on the actual content that was attached to the product as this is done by the external document management system.

2. If the product is associated with any course, and the **Expire all courses after complete by date** check box is selected, the user is prompted with these options for expiration dates:
   - For courses containing only this product, the complete by date is entered.
   - For courses containing more than one product, the earliest of the complete by dates of all the products is used.
   - For all learners who have the course, the current product is listed with an expired date.

   This resets the expiration date for the impacted product for each learner who was in compliance to this new date. If the updated product has not been marked complete by midnight, server time, on that date, then at 12:00:00 AM the learner's course state moves to `Expired' status.

   ·Upon compliance with updated the course, if there is an expiration period for the course, the expiration date for the learner will be set to the current date + expiration period. If there is no expiration period, then the course will be in compliance with no expiration date.

3. Within the product details, a view-only list of courses is displayed that contains the product for reference purposes.

Note A product that is a subscribed item from an external catalog cannot be versioned.

TAB 62:

View Personal Communities

Clicking the **Personal Communities** link in the sidebar displays the Personal Communities page. That page displays:

- A list of communities on your watch list
- A list of communities for which you are the administrator

Communities on Your Watch List

The watch list allows you to keep track of communities that interest you. You can add any community to your watch list. You can also:

- Review the Community Detail page by clicking the community name in the Community column.
- Remove a community from your watch list by clicking the **Delete** icon next to the community.

Adding Communities to Your Watch List

To add a community to your watch list:

1. Click **Add Communities** to display the Search For Communities window.
2. Enter search criteria into the Search For Communities window and click **Go**.

Note If no search parameter is entered, a list of all communities in the system is returned in a search result.

3. Click the **Join** icon next to a community you want to add to your watch list.

Communities that you Administer

You automatically become the administrator for every community you have created. Your collaboration administrator can also appoint you as an administrator for a community.

As administrator for a community you can:

- Edit a community.
- Delete a community.

Editing a Community

To edit an existing community:

1. Click the **Edit** icon next to the community you wish to edit. The Create a Community page appears.
2. Edit community details. You can modify the following properties:
   - Community name
   - Community description
   - Expert settings, which control how users become experts
   - Attachments settings, which control how users add attachments
   - Community enabling/disabling

   Disabling a community makes it unavailable for learners. The community is still displayed in the list of your personal communities and you can enable it at any time.

Deleting a Community

To delete a community, click the **Delete** icon.

Note Deleting a community permanently removes it from the system.

TAB 63:

View Course Detail

To view the details of a course, follow these steps:

1. Select Catalog from the drop-down module list.
2. Select the Courses tab and select the Search option in the left sidebar.
3. Enter Search Criteria and select Go. This will return the list of courses that match the search criteria.
4. Click the Icon in the Edit column. This will display the course details.

Editing Courses

Editing courses includes the same tasks performed when you first created the course. These tasks can be grouped into structure maintenance tasks and information addition tasks.

While viewing the Course Detail, you have the option to add or edit information. Information can be edited on the Main Details Page by selecting an editable field from the drop-down list at the top of the Main Information page. You can add detail by selecting on the desired link in the left sidebar.

Important Many of the changes made after a course has been made available will affect learners who are currently in progress for the course or have already acquired it. As a result, the LMS strongly recommends versioning any courses for which you make significant changes.

For more information, see TAB 64: "Managing Courses"

TAB 64:

Managing Courses

Managing courses includes the tasks performed after you initially create a course:

View Course Detail

To view the details of a course, follow these steps:

1. Select Catalog from the drop-down module list.
2. Select the Courses tab and select the Search option in the left sidebar.
3. Enter Search Criteria and select Go. This will return the list of courses that match the search criteria.
4. Click the Icon in the Edit column. This will display the course details.

TAB 65:

Creating a New Version of a Course

A new course version records changes to required learning and allows organizations to track the evolution of skills and knowledge required of people over time. Changes made to a course can be captured in successive versions of it, each with the same name but with a different number, letter, or combination of numbers and letters as an identifier.

This section includes:

- Workflow for Course Changes (See TAB 66.)
- Creating a Course Version (See TAB 67.)

TAB 66:

Workflow for Course Changes

Creating a new course version is one of a group of related tasks that are performed by selecting them from the **Change** menu that appears at the top of the ***Courses Detail*** page after the course has been saved.

These tasks can be performed independently, but are usually done in relation to each other. They concern creating a new course version, deciding the effect on learners of associating that version with their profiles, and expiring courses for certain learners.

A typical workflow for these tasks would be:

1. The administrator creates a new version of an existing course, which starts as a copy of the old version.
2. The administrator changes some elements of the new version. The new version might be reviewed at this point.
3. When the new course details are finalized, the administrator chooses the options involving the association of the new version with learners' profiles.
4. The administrator can then choose to force expiration of the old version of the course for learners who have acquired it, and also discontinue it in the catalog to prevent future registrations. In some cases, the administrator may wish to allow learners who have acquired the old version to keep it and to allow new registrations to be made.

Normally, learners whose role requires them to acquire a course are expected to continue re-acquiring it regularly and to always stay in compliance. However, at times an administrator wants these learners to upgrade their knowledge. Rather than creating an entirely separate course and assigning it to the same people, making a version of the original is easier. When the new version is finalized, the administrator can decide if it should replace the original or become an additional requirement, and the LMS automatically assigns it to the appropriate people. The learners then see the new course requirements on their profiles.

When a new version of a course is created, it is an identical copy of the old version except for the version number. Therefore, there is no point in associating the new version with learners' profiles until changes are made to the new version. While the system allows only one new version to be created for each certification, this new version can also have version made of itself.

All tasks performed by using the **Change** menu are tracked via e-signatures. However, changes to course version, modules, and learning items are not tracked. If these changes must be recorded for future use, a new course version should be created each time a change is made.

TAB 67:

Creating a New Course Version

To create a new version of a course:

1. A new version of a course is created from the **Change** drop-down menu in the ***Courses Detail*** page. To display this page, follow this path:
   Catalog ▶ Course ▶ Search ▶
2. Select **Version** from the drop-down menu to display a pop-up window and enter information into the fields provided in the window.

The following fields are provided in the window:

Version

You must enter a version identifier into the **Version** field. This can be any combination of letters or numbers, in any sequence. The course name and version identifier uniquely identify it.

TAB 68:

Recalculating Course Statuses

After changes are made to a course, learners' profiles can be updated to reflect the changes in three ways:

- If the business rule `Compute learner's course status immediately when role-course re-conciliation happens' is enabled, all course changes are made immediately to learners' profiles. By default, this rule is enabled.
- If this rule is not enabled, a periodic event can be used (`Compute Learner's Course Status') to schedule the work for non-peak hours.
- You can update learners' status manually after making course changes by selecting the **Recalculate Learner Status** menu option on the **Change** drop-down list in the ***Courses Detail*** page. This will display a pop-up window which states the number of learners holding the course, and allows you the choice of updating all the learners' profiles or a smaller number. Since updating a large number of profiles could impact your system, you may choose to do this during off-peak hours. If you are planning to run a report, you should recalculate statuses first to ensure that they are updated.

Note Status information displayed on learners' profiles is automatically updated when an individual record is accessed. This ensures that the most recent information is always displayed to the user.

TAB 69:

Forcing Course Expiration

You force expiration of a course, for all learners who have acquired it, from the **Change** drop-down menu in the ***Courses Detail*** page. To display this page, follow this path:

Catalog ▶ Course ▶ Search

Select **Force Expiry** from the drop-down menu to display a pop-up window, and enter a date and a reason for the expiration.

For all learners who have acquired this course, this action sets a new course expiration date that overrides the original expiration date for each individual course. The periodic event `Mark all courses that expired today' changes the course status from **Acquired** to **Expired** when the expiration date is less than today's date.

This option can be used in the event that a critical piece of information is added to the course and you want all certified learners to update. When the courses are forced to expire, all learners with that course are required to update the course by taking an original version.

When a future date is chosen for the expiration date, only courses with expiration dates after the new date are affected.

TAB 70:

Versioning Products in Courses

Courses can be affected when a product within the course is versioned. In particular, this happens when the old product version is part of a course's version and was completed by a learner in acquiring the course.

When the new product version is associated with any course, and the check box `Replace old version in all courses and require completion of new version by' is selected, the following changes occur in course expiration dates:

- For courses containing only this product, the product `complete by' date becomes the expiration date for completing this product.
- For courses containing more than one product, the earliest of the `complete by' dates of all the products is used.
- For all learners who have the course, the current product is listed with an expired date.

This resets the expiration date to this new date for the impacted product for each learner who had acquired it. If the updated product has not been marked complete by midnight, server time, on that date, then at 12:00:00 AM the learner course status moves from **Acquired** to **Expired**. The new expiration dates appear on the learner's ***Transcript*** and ***Course*** pages.

Note If a learner is granted a course, they receive it in **Acquired** status without having to complete any of the course elements, including products. If a new product version is created and is part of a course that was granted, those people who hold these courses do not have to re-certify because of the new product version.

TAB 71:

Cancel Direct Reports' Registrations

To cancel registrations:

1. Select **Registrar** from the drop-down list.
2. Click the **Order History** tab.
3. Enter criteria in the search fields and click **Go** to display a list of orders.
4. Click the Order Number link to view order details.
5. Click the **Modify** button to display the Modify Order Item page.
6. Click the **Cancel Item** button.

TAB 72:

Remove Learners from Waitlist

When a seat becomes available in a lesson, you can choose to confirm any waitlisted registration for the lesson. Confirming a waitlisted registration moves it from the waitlist to the available seat and changes the status of the registration from **Open - Waitlisted** to **Open - Normal**.

You can choose a waitlisted registration based on order (i.e. first waitlisted registration is assigned to first available seat) or priority.

To confirm a waitlisted registration:

1. Follow this path to display the ***Lesson Roster*** page:

Lessons ▶ **Lesson** tab ▶ **Go** ▶ **Edit** icon ▶ **Roster** sidebar link

2. Click the **Confirm** icon next to a listed item.
3. In the ***Confirm*** pop-up window, enter a reason for the change.
4. Click the **Save** button. The **Confirm** and **Waitlist Priority** icons are replaced by the **Waitlist** icon in the **Action** column.

Note Registrations also can be confirmed in the ***Registrations*** page in the **Lessons** module.

See Also

TAB 73: Transferring Waitlisted Registrations to Other Lessons

TAB 73:

Transferring Waitlisted Registrations to Other Lessons

As a lesson administrator, you can transfer waitlisted registrations to other lessons at any time. This is especially useful if a lesson is full and you know that no seats will become available.

To prevent a waitlist from growing too large, you can transfer a selected waitlisted registration or all waitlisted registrations to either:

- An existing lesson (with available seats)
- A new lesson created specifically for the waitlisted registrations

TAB 74:

Canceling Learners' Registrations

Canceling a registration removes the seat reservation in the lesson as well as the corresponding order line for the registration.

To cancel a registration:

1. Follow this path to display the ***Roster*** page:

Lessons ↖ **Lesson tab** ↖ **Go** ↖ **Edit** Icon ↖ **Roster** sidebar link

2. Click the **Cancel** action icon next to a listed item. A pop-up warning reminds you that this action cannot be reversed.
3. Click **OK** to continue. The cancelled registration is removed from the ***Roster*** page.

Note Registrations also can be cancelled for an entire course iteration. See TAB 71: Canceling Registrations for Course Iteration.

TAB 75:

Using the Facility Resource Calendar

To use the facility resource calendar in the LMS:

1. Select **Resources** in the Go to: drop-down list
2. Click **Facility** on the menu to display the **Search** link in the left navigation bar.
3. Enter search criteria in the fields in the left sidebar and click **Search** to find an existing facility.
4. Click the Edit icon next to a facility listing.
5. Click **Calendar** on the left menu to display the calendar.
6. Use the following controls to add or find an event:

View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time Zone	Change the calendar display to show events in different time zones. The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to reflect the new time zone.
Add New Event	Use this functionality to schedule known events for the resource that would make it unavailable for regular scheduling (e.g., maintenance work). Select an event type to display the Event Detail page. The Event type has a Start Date, and the All Day Event also contains an end date.
Show Date	Selecting a date from the pop-up calendar and then clicking **Go** will display that date in the main calendar.

7. Click **Save** when finished if adding or editing an event.

TAB 76:

Using the Location Resource Calendar

To use the location resource calendar in the LMS:

1. Select **Lessons** in the Go to: drop-down list
2. Click **Lesson** on the menu to display the **Search** link in the left navigation bar.
3. Enter search criteria (include the specific location) in the fields in the left sidebar and click **Search** to find all instruction unit for an existing location.
4. This will display the list of instructional units scheduled at the specified location.
5. Click **Display Calendar View in the upper right corner to display a calendar of units at the location.**
6. Use the following controls to add or find an event:

View By	Click on a link to display the calendar by month, work week (M-F), week, or day. Clicking the arrows moves the calendar display backwards and forwards by either a day or a week (Day), a week or a month (week, work week) or a month or a year (month). The day view can also be displayed by clicking the numerical date on a calendar when displayed in the week or month view.
Time zone	Change the calendar display to show events in different time zones. The default is the user's time zone (as defined in their computer clock). If the time zone is changed, the events' times in the calendar will change to reflect the new time zone.
Add New Event	Use this functionality to schedule known events for the resource that would make it unavailable for regular scheduling (e.g., maintenance work). Select an event type to display the Event Detail page. The Event type has a Start Date, and the All Day Event also contains an end date.
Show Date	Selecting a date from the pop-up calendar and then clicking **Go** will display that date in the main calendar.

7. Click **Save** when finished if adding or editing an event.

TAB 77:

Adding/Deleting Community Experts

To add/delete an expert,

1. From the **Go to** drop-down list select the **Collaboration** module.
2. Click the **Community** tab. The ***Community Detail*** page appears.
3. In the search box enter a name for the community.'
4. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert.

   Note If no name is specified, a list of all communities in the system is returned in the search results.

5. In the left sidebar, click the **Experts** link. The ***Experts*** page appears, displaying a list of all the experts in the community.

Adding Experts

To add an expert:

1. In the **Select a Category** drop-down list:
   - Select **Employee** to search for a user. (Selecting "Client" will not return any results)
2. Click **Find**. The ***Employee Finder*** section appears.
3. Enter search criteria. You can search by one or more of the following parameters: **Username**, **First Name**, **Last Name**, **Business Unit**, **Social Security No.**, **MOS**, and **Location**.

   Note If no search criteria are specified, a list of all internal/external users is returned in the search results.

4. Click **Find**. A list of all users matching the search criteria appears.
5. Select check boxes next to the users you wish to nominate as experts for the community.
6. Click **Done** to add the selected users as experts for the community.

Deleting an expert

To delete an expert, click the **Delete** icon next to the community expert you wish to delete. Once deleted from the list of experts, a learner is no longer an expert for the community.

See also

TAB 81: Overview of Communities

TAB 84: Creating Communities

TAB 82: Searching for Communities

TAB 78:

Creating Community Associations

A community can be focused on one or more of the following object types:

- Role
- MOS/Career Field
- Skill
- Course

Note If no name is specified, a list of all communities in the system is returned in the search results.

As a Collaboration administrator, you can specify on what objects a community is focused by creating associations. These associations appear in the ***Communities of Practice*** page for learners.

To create an association:

1. From the **Go to** drop-down list select the **Collaboration** module.
2. Click the **Community** tab. The ***Community Detail*** page appears.
3. In the search box enter a name for the community.'
4. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert.

   Note If no name is specified, a list of all communities in the system is returned in the search results.

5. In the left sidebar click the **Association** link. The ***Association*** page appears, displaying a list of all the associations created for the community.
6. Form the **Select a Category** drop-down list, select an object type: **Internal / External role**, **Internal / External job type**, **Skill**, and **Course**.
7. Click **Find**. The ***<Object_type> Finder*** section appears.
8. Specify search criteria and click **Find**.

   Note If no search criteria are specified, a list of all records in the system of the object type is returned in the search results.

9. Select check boxes next to the objects with which you wish to create an association.
10. Click **Done**.

See also

TAB 81: Overview of Communities

TAB 84: Creating Communities

TAB 82: Searching for Communities

TAB 79:

Adding Attachments to Communities

As a Collaboration administrator, you can add two types of attachments to communities: files and Web pages.

From the **Go to** drop-down list select the **Collaboration** module.

1. Click the **Community** tab. The ***Community Detail*** page appears.
2. In the search box enter a name for the community.'
3. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert.

Note If no name is specified, a list of all communities in the system is returned in the search results.

To add an attachment:

1. In the left sidebar, click the **Attachments** link. The following two sections appear:
   - Attachment List, displaying a list of all attachments in a community.
   - New Attachment, which allows adding new attachments to a community.
2. In the New Attachment section:
   . In the **Name** text field, enter a name for the attachment.
   a. From the **Category** drop-down list select a category.
   b. From the **Language** drop-down list select a language.
   c. Select the **Private** check box if you want to make the attachment unavailable for other learners.
   d. Select one of the following check boxes:
      - **Enter URL**, if your attachment is a Web page.
      - **Upload file**, if your attachment is a file.
   e. Enter a URL for a Web page or path for a file.
3. Click **Add to List**.

See also

TAB 81: Overview of Communities

TAB 84: Creating Communities

TAB 82: Searching for Communities

TAB 80:

Adding Notes to Communities

Notes allow Collaboration administrators to share information and comments about communities. Notes are available only for Collaboration administrators.

You can search for notes created in the system, as well as create your own notes for a community.

From the **Go to** drop-down list select the **Collaboration** module.

1. Click the **Community** tab. The ***Community Detail*** page appears.
2. In the search box enter a name for the community.'
3. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria. Click the community you want to add/delete an expert.

Note If no name is specified, a list of all communities in the system is returned in the search results.

Searching for Notes

To search for notes:

1. In the left sidebar click the **Notes** link. The ***Community Notes*** page appears.
2. Enter search criteria and click **Go**.

Creating Notes

To create notes:

1. In the Community Notes page, click the **Add New** link to display the ***Add Notes*** page.
2. Add notes and click **Save**.

See also

TAB 81: Overview of Communities

TAB 84: Creating Communities

TAB 82: Searching for Communities

TAB 81:

Overview of Communities

Through communities, the LMS provides a framework for learners and managers to collaborate and communicate in information gathering and distribution by joining or creating communities.

Communities focused on a MOS/Career Field, roles, skills, or courses can be created in the system. Users associated with a particular MOS/Career Field, role, skill, or course can view/ access the communities for those respective attributes.

In addition, users can participate in any community created in the system by adding the community to their watch list, or becoming an expert the community, or participating in community actions, such as discussions or chat.

Users can also create communities of their own.

TAB 82:

Searching for Communities

To search for a community:

1. From the **Go to** drop-down list select the **Collaboration** module.
2. Click the **Community** tab. The ***Community Detail*** page appears.
3. In the search box enter a name for the community.

Note If no name is specified, a list of all communities in the system is returned in the search results.

4. Click **Go**. The ***Search Results*** page appears, displaying a list of communities matching your search criteria.

The ***Search Results*** page allows you to:

- Edit a community.

For more information, see TAB 83: "Editing Communities".

- Permanently delete a community from the system by clicking the **Delete** icon.

Once you click the **Edit** icon for a community, the ***Community Detail*** page appears. In this page you can perform the following tasks:

Task	For More Information, See:
Adding or deleting community experts.	TAB 77: "Adding/Deleting Community Experts"
Creating association for a community.	TAB 78: "Creating Community Associations"
Adding attachments for a community.	TAB 79: "Adding Attachments to Communities"
Adding notes for a community.	TAB 80: "Adding Notes to Communities"

See also

TAB 81: Overview of Communities

TAB 84: Creating Communities

TAB 83:

Editing Communities

To edit a community:

1. In the ***Search Results*** page, click the **Edit** icon next to the community you want to edit. The ***Community Detail*** page appears.
2. Edit the community details, by performing one or more of the following tasks:
   - Edit community name.
   - Enable / disable the community.
   - Change the security domain.
   - Change the community administrator.
   - Allow users to add themselves as experts.
   - Allow any user to add attachments.
   - Edit the description of the community.
   - Edit custom fields.
3. Click **Save** to save the changes.

See Also

TAB 81: Overview of Communities
TAB 84: Creating Communities
TAB 82: Searching for Communities

TAB 84:

Creating Communities

Collaboration administrators can create communities in the system, define community administrators, and make community associations, as well as add attachments and notes to a community.

To create a community:

1. From the **Go to** drop-down list, select the **Collaboration** module.
2. Click the **Community** tab.
3. Click the **Create** link. The ***Community Details*** page appears.
4. In the **Name** filed, enter a name for the community.
5. Click the icon next to the **Security Domain** field to display the ***Domain Finder*** window.

To search for a security domain:

a. In the **Domain Name Like** text field, enter search criteria.

b. Click **Find**. A list of security domains matching the search criteria appears in the search results area.

Note If no search criteria are specified, a list of all security domains in the system is returned in the search results.

c. Click the **Select** icon next to the security domain you want to use.

6. Select the **Enable** check box to specify if the community is available to learners.
7. Click the icon next to the **Community Administrator** filed to search for a user, who you want to appoint as a community administrator. By default, the ***Search for Internal People*** window appears. You can use the ***Search for Internal People*** window to search for LMS users.

To search for a user:

a. Specify search criteria. You can search by **First Name**, **Last Name**, **User Name**, **Business Unit**, and **Location**.

Note If no search criteria are specified, a list of all internal/external users in the system is returned in the search results.

b. Click the **Select** icon to select the user, you want to appoint as a community administrator.

c. Click **Go**.

8. Select the check box which specifies whether users can add themselves to the community as experts.

If the check box is not selected, only Collaboration administrators can add users as experts for the community.

9. Select the check box which specifies whether users can add attachments to the community.

If the check box is not selected, only Collaboration administrators can add attachments to the community.

10. In the **Description** text field, enter a description for the community.
11. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area.

Enter information in the fields as required/desired.

12. Click **Save**.

Once a community is created, you can perform the following tasks for the community.

Task
Add / delete community experts.

Set community associations.
Add attachments to a community.
Add notes to a community.

See also

TAB 81: Overview of Communities

TAB 82: Searching for Communities

TAB 85:

Communication Features

The LMS provide the framework for learners and managers to collaborate and communicate in many different ways.

By joining a community created in the system, users can participate in community actions, such as community specific discussion groups and chat rooms.

Feature	For More Information, See:
Discussions	See TAB 19: "Discussions"
Chat	See TAB 86: "Chat"

TAB 86:

Chat

Chat is a LMS component that allows users to instantly exchange messages. Chat rooms are available for:

- Catalog items
- Communities

Chat Rooms for Catalog Items

Each catalog item in the system has a chat room associated with it. Learners can use the Chat room instant messaging service to communicate with other learners who are registered for the catalog item.

Learners who have ordered a catalog item are granted access to the corresponding chat room once the order is confirmed. Chat rooms remain available after catalog items are completed/delivered.

Chat Rooms for Communities

Each community in the system has a chat room associated with it. The chat room for a community is available to all learners who are watching the community or are experts in the community. A chart room is available as long as the community exists.

See also

See TAB 85: Communication Features

See TAB 19: Discussions

TAB 87:

Critiques

Critiques are questionnaires that are made available to specified registered learners for courses, lessons, and products. Critiques can be used to assess your educational delivery processes and materials for a specific class or product.

For example, a lesson critique could be used to solicit feedback from students in the lesson about the quality of instruction, course materials, facilities, or equipment used in the delivery of the lesson. Similarly, a product critique could be used to solicit feedback from registered learners about the quality of the materials (i.e. content) for the product.

Critiques are created in the LMS and consist of:

- A questionnaire.
- A specified course, lesson, or product.
- A set of selected learners (i.e. respondents).

The respondents can be either learners who are currently registered for the class/product or all learners who register for the course/lesson/product after the critique is created.

Note Typically, you use pre-existing questionnaires from the LMS content repository to create critiques. These questionnaires are created by content administrators and stored in the LMS content repository for use by collaboration administrators and instructors. However, if no questionnaires exist that satisfy the needs of your critique, you can create your own `informal' questionnaire and use it in the critique.

For more information about questionnaires, see TAB 100: "What is a Questionnaire?".

See Also

TAB 88: Creating Critiques

TAB 89: Searching for Critiques

TAB 90: Closing a Critique

TAB 91: Viewing Results

TAB 88:

Creating Critiques

To create a critique, perform the following tasks:

1. Define the Critique (See TAB 92.)
2. Select Respondents for the Critique (See TAB 93.)

See Also

TAB 89: Searching for Critiques

TAB 91: Viewing Results

TAB 89:

Searching for Critiques

To search for critiques:

1. Select the **Collaboration** module from the **Go to:** drop-down list.
2. Click the **Evaluation** tab to search for a critique
3. Click the **Search** link.
4. In the **Search** area, enter the name of a critique. A page appears displaying a list of critiques matching the search criteria.

   If no search criteria are specified, a list of all critiques created in the system is displayed in the search results.

From the list of critiques returned by your search, you can perform the following tasks:

- View critique details - click the name of a critique.
- View critique results - click the name of a critique and, in the ***View Critique*** page, clicking the **View Results** link.
- Delete a critique - click the **Delete** icon next to the critique you wish to delete.

See Also

TAB 88: Creating Critique

TAB 90: Closing a Critique

TAB 91: Viewing Results

TAB 90:

Closing a Critique

As a Collaboration administrator, you can close a critique at any time; however, because a closed critique is no longer available to the respondents in the critique, you should use the respondent statuses to determine whether to close a critique.

To close a critique:

1. In the ***Critique*** page, click the name of a critique you wish to close.
2. In the ***View Critique*** page, click the **Close Critique** link.

Note A closed critique is no longer available to respondents.

See Also

TAB 87: Critiques

TAB 94: Respondent Statuses

TAB 88: Creating Critiques

TAB 89: Searching for Critiques

TAB 91: Viewing Results

TAB 91:

Viewing Results

To view the results for a critique:

1. Select Collaboration from the Go-to: Drop-down list and select the Critique tab.
2. Search for the name of the critique; click the name of the desired critique.
3. In the ***View Critique*** page, click the **View Results** link in the right-top corner.

   The ***View Results by Learner*** page appears displaying all the submitted responses for the critique.

See Also

TAB 87: Critiques

TAB 88: Creating Critiques

TAB 89: Searching for Critiques

TAB 90: Closing a Critique

TAB 92:

Define the Critique

To define a critique:

1. Select the **Collaboration** module from the **Go to:** drop-down list.
2. Click on the **Critique** tab and select the **Create** link.
3. Name the critique and, optionally, provide a description.
4. Select an existing questionnaire to use for the critique.

Note If a questionnaire does not exist that satisfies the needs of the critique, you can create one. For more information, see TAB 100: "Creating a Questionnaire".

5. Select a radio button next to the critique type you want to create, choosing between **Lesson** and **Product**.
6. Select a product using the **Finder** icon next to the **Product** field.

OR

Select a class using the **Finder** icon next to the **Lesson** field.

7. You can select respondents for the critique now.

OR

You can save the critique for editing later (e.g. selecting respondents) by clicking **Save for later**.

Note A critique should ***not*** be submitted until at least one respondent has been selected for the critique. Once submitted, no more respondents can be selected for a critique. If you are not ready to select respondents for the critique you are creating, use the **Save for later** button.

Next

Select Respondents for the Critique (See TAB 93.)

See Also

TAB 89: Searching for Critiques

TAB 93:

Select Respondents for the Critique

Until submitted, you can always manually add respondents to a critique from the list of currently-registered learners for the course/lesson/product for the critique:

- For a product critique, use the **from** and **until** fields to limit the learners to a specified date range, based on registration date, and click the **Add Respondents** link, or

Leave the fields blank and click the link to add all currently registered learners.

- For a lesson critique, click the **Add Respondents** link to add all currently-registered learners.

In addition, the LMS provides three distribution options for sending a critique to respondents:

Distribution Option	Description
Option 1 Send to current list of respondents only	This option sends the critique to all learners who are on the list of respondents at the time the critique is submitted. No other learners will receive the critique.
Option 2 Send to current list of respondents and new learners UPON REGISTERING/ORDERING	This option is similar to option 1, except it also automatically sends the critique to each learner who registers for the class/product ***after*** the critique has been submitted.
Option 3 Send to current list of respondents and new learners UPON COMPLETION	This option is similar to option 2, except it sends the critique to registered learners only upon completion of the course/lesson/product (instead of registration).

Once the critique is defined and respondents selected, click the **Submit** button to send the critique to the selected learners.

Note Respondents for a critique receive the critique at the appropriate time (i.e. immediately, upon product/class registration, or upon completion) regardless of the status of their order.

See Also

TAB 96: Selecting a Distribution Option for the Critique

TAB 94:

Respondent Statuses

Once a critique is submitted, it is available in the **Assessment** tab of the **My Home** module to learners designated as respondents for the critique. The respondents can choose to accept or decline the critique.

In the ***Critiques*** page, clicking the name of a critique opens the ***View Critique*** page, which displays a status of the critique for each respondent. A critique for a respondent can have the following status:

Action Performed by Respondent	Respondent Status
Critique has not been started by respondent.	**Not started**
Critique is accepted by respondent.	**Accepted**
Critique is declined by respondent.	**Declined**
Critique is started, but not completed by respondent.	**In progress**
Critique is completed by respondent.	**Submitted**

See Also

TAB 95: Critique Statuses

TAB 95:

Critique Statuses

The ***Critiques*** page displays a list of all critique you have created and their statuses. A critique can have the following statuses:

Action Performed by Administrator	critique Status
Critique is saved for later, not submitted.	**New**
Critique is submitted and available for respondents.	**In Progress**
Critique is closed.	**Closed**

See Also

TAB 94: Respondent Statuses

TAB 96:

Selecting a Distribution Option for the Critique

The option you choose depends on whether you are selecting respondents for a product or lesson critique and whether the product/lesson has any existing registrations. It also depends on whether you wish to strictly control or track the number/type of respondents on the critique.

In particular, the inherent differences between products and lesson may affect your decision:

- Lessons have a limit on the number of registered learners (i.e. number of seats in the lesson) and a definite start and end date, which means they have a closed life-cycle that ends when the lesson is delivered and all students have been marked complete for the lesson.

You must also decide whether to create lesson critiques before, during, or after the lesson is taught.

- In contrast, products can have an unlimited number of registered learners and an open-ended life-cycle in which the product is available indefinitely.

For products, you have to decide whether you want to control the number of respondents for the critique. You may choose to create a single critique that includes all respondents or you may choose to limit the respondents based on registration date. For example, you could choose to create a critique monthly or quarterly that is sent to all learners who registered for the product during the time period.

The following table describes some possible scenarios for adding respondents to critiques and provides some suggestions:

Critique Type	Conditions	Suggested Distribution Option
Lesson	No registrations (i.e. new lesson)	Select either Option 2 or Option 3. This frees you from having to monitor/track lesson registrations and create separate critiques as learners register for the lesson.
	Existing registrations	Select Option 2, but also manually add the existing registered learners to the critique. You can also use Option 3, but all learners who are added manually will receive the critique immediately upon submission, while learners who register after submission will receive the critique only upon completion of the lesson.
	Lesson is full and/or lesson has ended	Select Option 1 and manually add the registered learners to the critique.
Product	No registrations (i.e. new product)	Select either Option 2 or Option 3. If you want to control the number of respondents, you will need to remember to close the critique at the appropriate time and create another critique for the same product.
	Existing registrations and product is still available	Select Option 2, but also manually add the existing registered learners to the critique. You can also use Option 3, but learners will receive the critique at different times (see above).
	Existing registrations, but product is no longer available	Select Option 1 and manually add the registered learners to the critique.

TAB 97:

This TAB is not used.

TAB 98:

This TAB is not used.

TAB 99:

This TAB is not used.

TAB 100:

Creating a Questionnaire

To create a questionnaire for use in surveys and evaluations:

1. In the LMS, select **Collaboration** from the **Go to:** drop-down list.
2. Click the **Questionnaire** tab.
3. Click the **Create** link in the left sidebar.
4. Enter a name and, optionally, a description for the questionnaire.
5. Click **Save**.

A **Next** button appears, which is used to start Questionnaire Builder.

6. To start Questionnaire Builder, click the **Next** button.

The Questionnaire Builder interface appears, where you can define the questions and other contents for the questionnaire.

Note To access Questionnaire Builder, you must have the appropriate security privileges for content. As such, if you are unable to access Content Builder, please contact your system administrator.

TAB 101:

Create and Edit Products

Create Products

This process is used for creating training products in the LMS, such as CD-ROMS, as well as creating inventory.

To create a product (and inventory) in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Product** on the menu and click the **Create** link in the left sidebar to display the page for creating a new product.
3. Enter the ***required*** information for creating the product:

Required Information	Description
Product Group	Select the product group under which the product is classified in the Product Catalog.
Part Number	Enter a part number for the product. You must enter an alphanumeric string that uniquely identifies the product. Part number can be used to search for and order the product. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. **Note** If the prefix appears, do ***not*** delete or change the prefix. The system requires product group prefixes to be included in all part numbers.
Name	Descriptive name of the product.
Category	User-defined category which specifies the product type/media (e.g. WBT, Assessment Test, Video). The category also specifies whether the product is shippable or launchable/downloadable.
Available From	Select the date the product will be available.

4. Enter any ***optional*** information for the product:

Optional Information	Description
Security Domain	Select a security domain for the product.
Discontinued From	Select the date after which this product is no longer available.
Available Quantity	(Display only) Displays the total number of units available at all the locations for the product. The field is incremented when you enter quantity numbers for the product in the ***Inventory*** page. The field is decremented when you add the item to an order. **Note** This field only applies to shippable products. For downloadable/launchable product, this field is empty.
Reserved Quantity	(Display only) Displays the total number of units that have been reserved for open orders. The field is incremented when the product is added to an order in an order. The field is decremented when the item in an order is shipped. **Note** This field only applies to shippable products. For downloadable/launchable product, this field is empty.
Training Units	Enter the number of training units to charge for the course. By entering a number in this field, you specify the lesson template as able to accept training units in place of other payment methods in customer orders. **Note** Training units are not affected by price bands or custom pricing.
Abstract	Enter an abstract, up to 1024 characters long, for the product.
Vendor	Select a vendor name for the product.
Manufacturer	Select a manufacturer name for the product.
Version	Enter a value if you want to track versions of the product.
Display for Call Center	Select this check box to display the product in the Training Catalog for Call Center registrars (LMS).
Display for	Select this check box to display the product in the Training

Web	Catalog for learners, managers, and group administrators, as well as web registrars.
Internal	Select this check box to designate the product as orderable for employees.
External	Select this check box to designate the product as orderable for clients (external users).
Use as Resource	Select this check box to indicate the product can be used as inventory for lesson iterations. To create inventory, you must assign it to a location.

5. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area.

   Enter information in the fields as required/desired.

6. Click **Save** to save your information.

Edit Products

After you have created the Product, you may edit the specified attributes or add additional information. To edit the product:

7. Select **Catalog** in the **Go to:** drop-down list.
8. Click the **Product tab** and click the **Search** link in the left sidebar.
9. Enter the search criteria and press Go.
10. Find the desired product and click the Edit icon.
11. You can edit the information on the main page using the drop-down list above the main page information.
12. You can edit additional information (e.g., attachments, prerequisites) using the left sidebar links. See the links below for more information about that.

After the system creates the product, links to the following pages are displayed:

- Attachments
- Associated Content
- Skills
- Prerequisites
- Equivalents
- Keywords
- Audit Trail
- Courses
- Inventory Location

- Notes (See TAB 14: Notes)
- Internationalization (Functionality Not Used in System Release.)

TAB 102:

Create and Edit Modules

Create Module

To create a module, you will have already have had to input some course and phase information. You have to create at least one module in order to create a course template. You are already in the Catalog Go-to: Drop-down, the Courses tab, and the Phases link.

To create a module:

- Click Add New
- Enter the Name and Available From date as required information; Discontinued from and Acquire with fields are optional.
- Click Add New
- Enter the Name and Number of Offerings required to finish module.
- Click Add New
- Select the learning offerings you want by using the search tool.
- Click Save.

Marking a Module in a Version as Required

You can designate this specific module as required by selecting the **Required** check box.

Specifying Number of Completion Choices

You must indicate the number of choices the learner is required to complete by entering a number in the field. The number of learning offerings in a version must be equal to or greater than the number entered into this field.

Edit Module

There are two ways to edit modules, (1) from the courses tab, (2) from the course iterations tab. You would choose the later to modify modules for a specific iteration, and the former so to affect all future iterations.

Courses

- Select **Catalog** in the **Go to:** drop-down list.
- Click the **Courses tab** and click the **Search** link in the left sidebar.
- Enter the search criteria and press Go.
- Find the desired course and click the Edit icon.
- Click the Course Version link.
- Click the Edit icon of the version with contain the module you want to edit.

- Click the Edit icon of the module you want to edit.
- From here you can delete learning offerings, add more offerings, or change the information about the module.

Course Iterations

- Select **Catalog** in the **Go to:** drop-down list.
- Click the **Course Iteration tab** and click the **Search** link in the left sidebar.
- Enter the search criteria and press Go.
- Find the desired course iteration and click the Edit icon.
- Click Course Iteration Lessons link.
- Click the Edit icon next to the module you want to edit.
- From here you can delete learning offerings, add more offerings, or change the information about the module.

TAB 103:

Marking a Single Phase for Re-certification

Select the **For Re-certification** box to indicate the phase is only for re-certification.

A re-certification phase can only be taken by a learner who has already completed the course. Once a course expires, the learner must take one of the original phases to re-certify for the course.

A phase also can be marked for re-certification on the ***Course Iterations*** page.

Warning You **MUST** enter a value in the **Re-certification Window** field on the ***Main*** page **BEFORE** you can designate a re-certification phase and save it.

TAB 104:

Specifying Available and Discontinued Dates for a Phase

Each phase must have an **Available From** date and a phase name entered before it can be saved. The **Available From** and **Discontinued From** dates indicate when the phases can be taken by a learner.

Available From

Entering a date in this field indicates the first day the course phase is available. This field can be used to ensure that all lessons or products are available when learners need them. When the field is automatically populated, the date defaults to the next day.

Disc. From

You can specify a date after which a phase is no longer available. This allows you to make obsolete phases unavailable to learners.

Acquire Within (Days)

You can specify a period within which the learning elements in a phase must be completed. If values are entered into this field and into the **Acquire Within** field for the entire course, the phase value will take precedence.

Note If a phase has been marked as a re-certification phase, this field is not available, since elements taken for re-certification must be completed within the **Re-certification Window** time period.

TAB 105:

Marking All Modules in a Phase as Required

All modules included in a phase are listed on this page, and each one can be designated as required for the course by selecting the check box in its listing in the **Required?** column. Required modules must be taken in order to acquire a course, while optional modules can be used to present supplementary or background information.

TAB 106:

Deleting Modules from Phase

The modules listed on this page for this course can be deleted individually by clicking the delete icon on the far right of the listing.

TAB 107:

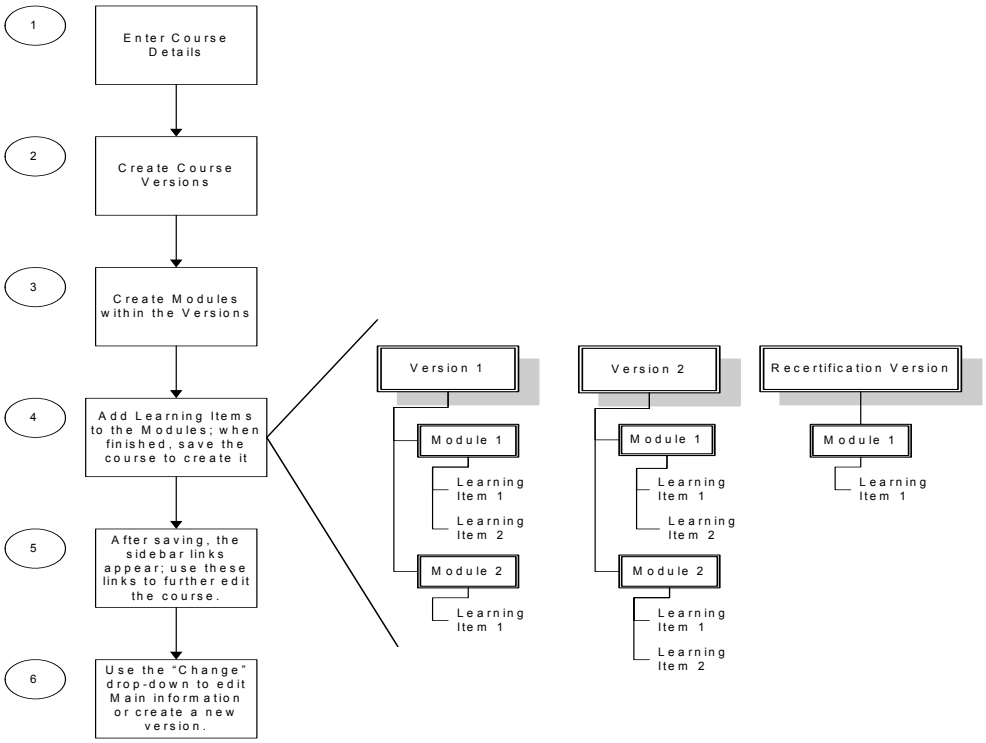
Create and Edit Course Templates

Create Course Template

Because courses are based on products, lessons, and other instructional units, you must first define (create) these in your catalog before you can assign them to a course. When you create a course template as an object in the system, it can then be found by searching for it, it can be assigned to learners, and it can be edited in several ways to make it more powerful or flexible. An administrator can create a basic course, and then return to it as needed to edit it. Or the course can be fully defined when it is created, with no (or few) changes made during its life cycle. In either case, the administrator will probably want to make a new version when significant changes are required, since that method can be used to plan the effect on large numbers of learners who hold the course.

Important Many of the changes made after a course has been made available will affect learners who are currently in progress for the course or have already acquired it. As a result, the LMS strongly recommends versioning any courses for which you make significant changes.

The "Course Creation Process" graphic below illustrates the steps in creating and editing a course. The numbers are keyed to the task descriptions that follow the graphic.



To create the course template:

- Select **Catalog** in the **Go to:** Drop-Down list.
- Click **Courses** on the menu and click the **Create** link in the left sidebar to display a form to define a new course.
- Enter the ***required*** information needed to define the course.

Required Information	Description
Name	Name of the Course
Available From	Date when course will be available; use Calendar Picker tool.

- Enter any ***optional*** information for the course:

Optional Information	Description
Discontinued From	Date when course will no longer be available; use Calendar Picker tool.
Security Domain	Select a security domain for the course from the pick list in the Security Domain field.
Acquire within (days)	Number of days Learner has to complete course.
Valid for (days)	Number of days course is valid for.
Notify before (days)	Number of days before course when the LMS will notify applicable persons about the start of the course.
Recertification Window (days)	Number of days user has to recertify in the course after it is in-valid.
Recertification Policy	Gives you choices regarding your recertification policy.
Abstract	Free form text to add an abstract for the course.
Custom Fields	Enter information in any custom fields that have been defined.

For more information, see **Entering Course Details** at TAB 108.

- Create Phases

Create at least one phase for the course. You can mark phases for re-certification and

delete versions after you have created them.

- Create Course Modules

Create at least one module for the phase.

- Add Learning Offerings to Modules.

Specify one or more learning items for the module. Save the course. This creates it and causes the sidebar menu links to appear.

Edit Course Templates

After you have created the course, you may edit the specified attributed or add additional information. To edit:

- Select **Catalog** in the **Go to:** drop-down list.
- Click the **Course tab** and click the **Search** link in the left sidebar.
- Enter the search criteria and press Go.
- Find the desired course and click the Edit icon.
- You can edit the information on the main page using the drop-down list above the main page information.
- You can edit additional information (e.g., attachments, prerequisites) using the left sidebar links. See the links below for more information about that.

Edit using Sidebar links (if necessary).

Use the sidebar menu links to further edit the course.

After the system creates the item, links to the following pages are displayed:

Page	Description
Internalization	Functionality Not Used in System Release.
Notes	This allows you to add notes about the course.
Prerequisites	This allows you to assign prerequisites to a course. This would disallow any user from requesting the course if they did not meet the prerequisites.
Roles	This allows you to assign roles to a course. Add roles to course
Audit Trail	This allows you to view the changes made to the course.

Course Iterations	This allows you to edit the course iterations for the course.
Attachments	This allows you to add attachments to the course.

TAB 108:

Entering Course Details

You can perform the following tasks in the ***Course Detail*** page:

- Specifying a Course Name (Required) (See TAB 109.)
- Specifying Course Dates and Time Periods (See TAB 110.)
- Specifying a Re-certification Policy (See TAB 111.)
- Writing a Course Abstract (See TAB 112.)
- Specifying a Course Security Domain (See TAB 113.)

TAB 109:

Specifying a Course Name (Required)

You specify a course's name in the ***Courses Detail*** page. To display this page, follow this path:

Catalog ▶ Course ▶ Create (or Search)

You must enter a name that is unique for a domain when creating a course; it is one of two required fields on this page (**Available From** is the other). Entering data into these two required fields and then saving the page creates the course. Saving the page also causes additional links to appear in the sidebar and allows you to use the **Course Versions** link to create versions. If you click the versions link before saving the page, a message will appear reminding you to enter information into the required fields.

A courses' name, along with its version number, appears on the ***Search Results*** page for a catalog administrator, manager, and learner. It also appears on the learner's ***Courses*** page.

TAB 110:

Specifying Course Dates and Time Periods

The dates and time periods entered for a course govern its behavior and how learners interact with it. These values determine:

- When the course is available
- How long a learner has to acquire it
- When it expires and when a notification can be sent
- The time period allowed to earn re-certification

The *Course Time Line* shows typical important events and time periods in the life cycle of a course. Some events, such as *Force Expiration* or *Discontinue Course,* might not occur, but are shown for completeness.

Course periods are set by specifying the following dates:

- Available From (Required) (See TAB 114.)
- Discontinued From (See TAB 115.)
- Acquire Within (See TAB 116.)
- Valid For (See TAB 117.)
- Notify Before (See TAB 118.)
- Recertification Window (See TAB 119.)

These values are specified in the ***Courses Detail*** page. To display this page, follow this path:

Catalog ▶ Course▶ Create (or Search)

TAB 111:

Specifying a Re-certification Policy

The re-certification policy is specified in the ***Courses Detail*** page. To display this page, follow this version:

Catalog ▶ Course ▶ Create (or Search)

The expiration date for a course can be calculated from the date the course is acquired for the first time, or re-acquired, or from the previous expiration date if the course has been acquired at least once before. Which date is used for expiration is governed by the choice made by selecting one of the two radio buttons in the ***Courses Detail*** page:

- *Set new expiration date based on completion date of last required item* - use this choice to calculate the new expiration date from the **Acquired On Date**. This choice is the strictest, ensuring that learners are never given extra time after they complete the learning items required for a new validity period of their course.
- *Set new expiration date based on previous expiration date* - use this choice to calculate the new expiration date from the previous expiration date. This choice is less strict, and is useful in ensuring that the expiration dates for a large group of learners are coordinated, regardless of small discrepancies between the dates when learners complete individual items.

Note The re-certification policy only governs the expiration date for re-certification. When the course is first acquired, the expiration date is set based on the **Acquired On** date plus the **Valid For** value.

TAB 112:

Writing a Course Abstract

The abstract is written in the ***Courses Detail*** page. To display this page, follow this path:

Catalog ▶ Course ▶ Create (or Search)

The abstract is a text description of the course. This description appears on the ***Courses*** page used by learners to view courses assigned to them and by managers and learning approvers to assign courses to their team and units.

TAB 113:

Specifying a Course Security Domain

The security domain is specified in the ***Courses Detail*** page. To display this page, follow this path:

Catalog ▶ Course ▶ Create (or Search)

Each object in the system, including users, has a domain to which it is assigned. This domain is known as the object's security domain. Access to objects is defined through the privileges granted to the object in the security lists for a user.

A security domain for the course can be selected from the pick list in the **Security Domain** field.

For more information about Security Domains, see TAB 120: "Common Learning Objects".

TAB 114:

Available From (Required)

The date entered in this field is the first day the course is available in the catalog. Choosing a date for this field is required before the course can be saved. This course will not be listed in the catalog for administrators, learners, or managers before this date, and therefore cannot be assigned to a person until after this date. When the field is automatically populated, the date defaults to the next day.

TAB 115:

Discontinued From

The date entered in this field is the last day the course is available in the catalog. When a course is discontinued, it cannot be assigned to a learner in the future, and there is no requirement to re-certify for those who have acquired it. If learners have a course with a **Planned** or **In Progress** status when it is discontinued, they cannot acquire it.

If a course is discontinued, an administrator may choose to replace it with another course, or with a new version of the course. Discontinuing an original course when a new version is created can be helpful because the original is no longer displayed in the list of courses that can be assigned to learners in the future, thus avoiding any confusion regarding which one to assign.

When discontinuing a course, an administrator should consider that:

- If a course is discontinued but not forced to expire, it will expire on its regular expiration date and learners who have acquired it will not receive a notification to re-certify.
- If a course is discontinued *and* forced to expire, it may be replaced with another course or version.

TAB 116:

Acquire Within

This number refers to the number of days in which all learning items must be completed in relation to each other. In the example shown in the “Course Time Line” illustration, a course that requires the learner to complete items 101, 102, and 103 is given an **Acquire Within** value of 60. To satisfy the requirements of the course, the learner must complete all three items within 60 days of each other. . (See TAB 110: “Specifying Course Dates and Time Periods”.)

When a course is assigned to a person, the system looks backward a number of days equal to the **Acquire Within** period. If it finds items required by the course that the person has already completed, it gives credit for those items by using the completion date of the first item as the beginning of the **Acquire Within** period, and marks the course status as **In Progress**. (If the person does not have all prerequisites, the status is marked as **Planned**.) The system calculates the end of the period by using the number entered into the **Acquire Within (days)** field. In the example, the system looks back 60 days from January 5 and finds that the learner completed item 101 within the previous 60 days. This item is counted towards acquisition of the course and the **Acquire Within** period starts on that date.

Each time the learner completes an item, the system verifies that it is within this period before crediting the acquisition toward the completion of the course. As time passes, items that were completed outside of the time specified in the **Acquire Within** period become ineligible, and must be taken again. In our example, the learner completes items 102 and 103 within 60 days of completing the first item, and acquires the course. If one or both of these last two items were not completed within 60 days, the oldest item(s) would no longer count toward acquisition and would have to be completed again.

If no value is entered into the **Acquire Within (days)** field, there would be no time restriction, and the learner would acquire the course as soon as all items were completed, regardless of how many days had passed between taking them all. In addition, if there is only one item required, there is no need for an **Acquire Within** period; the course is acquired as soon as the item is completed.

If a value is entered into the **Valid For** field, a value must be entered into the **Acquire Within** field if learners are to be able to re-acquire a course in the event it expires.

All required elements for a course must be completed before a learner can complete a course. For example, if a course contains a required sub-course that a learner has already completed, and the sub-course expires before the main course is completed, the learner will not complete the main course until he or she complete the sub-course again. In this case, if the sub-course had not expired, it would not have to be re-done in order to count towards completion of the main course. Having it in **Acquired** status would be sufficient. If any required sub-course or product expires or has a new version created during the **Acquire Within** period for the main course, the elements must be re-acquired or completed within the **Acquire Within** period.

TAB 117:

Valid For

A number entered into this field determines the period that the course is valid. The system uses this value to calculate the number of days between the acquisition date and the expiration date of the course. Using the example in the "Course Time Line" illustration, the course was acquired on February 10, 2001, and 365 was entered into the **Valid For** field, so it expires on February 10, 2002. (See TAB 110: "Specifying Course Dates and Time Periods".)

If the **Immediately expire when any courses within this course expire** check box is selected, the expiration of any sub-course will cause the main course to expire as well.

If no number is entered into the **Valid For** field, the course never expires and no re-certification is required or possible; the course always stays in **Acquired** status for a learner who acquires it. Also, in this case, no notification would be triggered after a period specified in the **Notify Before** field.

If a number is entered into the **Valid For** field, but no number is entered into the **Re-certification Window** field, re-certification cannot occur.

TAB 118:

Notify Before

The number entered into the **Notify Before** field determines the number of days before expiration that the course holder can be notified that the course is going to expire. If no number is entered into the **Valid For** field, this notification will not be triggered because no re-certification is necessary.

The LMS does not currently support this functionality.

TAB 119:

Re-certification Window

The number entered into the **Re-certification Window** field determines the number of days in which all items must be completed for re-certification. If all items for re-certification are successfully completed within this period, the learner re-acquires the course for another full period. Any items completed before this period begins are not counted towards re-certification and must be completed again. If all required items for re-certification are not completed before the course expires, the learner must re-acquire it by taking a regular version instead of a re-certification version.

If no number is entered into the **Valid For** field, re-certification is not required and not possible since the course never expires.

During the upgrade process, the **Re-certification Window** period value is defaulted to the value in the **Valid For** field.

If a number is entered into the **Valid For** field, but no number is entered into the **Re-certification Window** field, re-certification cannot occur. Also, if there is no **Re-certification Window** value, a version cannot be designated as a re-certification version.

Warning You MUST enter a value in the **Re-certification Window** field on the ***Main*** page BEFORE you can designate a re-certification version and save it on the ***Courses Detail*** page.

TAB 120:

Common Learning Objects

This appendix describes those business objects that are common to most of the Saba client modules.
This appendix covers the following topics:

- Domains
- Security Lists
- Audited Attributes
- Electronic Signatures
- Notes
- Attachments
- Tasks
- Graphical Calendars (Saba Web)
- Employee User Schedules (Saba Client)

TAB 121:

Create and Edit Phases

Create Phases

Phases are created during the course template creation process.

1. Select Catalog from the Go-to: Drop-down list. Select the Courses tab.
2. If the course template already exists, use the search fields to find the desired template and click the Edit icon. If the template does not already exist, click Create and enter the required information.
3. Click the Phases link in the upper right corner of the Main Information page.
4. Follow the steps to creating modules and adding learning items.

Edit Phases

1. Select Catalog from the Go-to: Drop-down list. Select the Courses tab.
2. Enter search criteria to find the course template where the phase exists. Click on the Edit icon next to the desired course template.
3. Click the Phases link in the upper right corner of the Main Information page.
4. Click the Edit icon next to the phase you want to modify.
5. As required, you can modify any information, delete modules, or edit existing modules.

TAB 122:

Specifying Items for a Module

To display this pop-up window, click the **Add New** link in the ***Course Modules Detail*** page. This window allows you to add learning items to a module.

Adding Learning Items to a Module

Each course module must contain at least one learning item. After using the pop-up window to add one or more items, they will be listed on the ***Course Modules Detail*** page, where you can delete them if necessary by clicking the delete icon next to an item listing.

Note Courses can be added to modules in addition to courses and products.

TAB 123:

Specifying Additional Information for a Course

You can edit a course by adding information to make it more powerful by using the sidebar menu links. This menu is created when the course is created. You can perform the following tasks:

- Specifying Internationalization Information
- Adding Course Notes
- Creating Course Packages
- Assigning the Course to Roles
- Specifying Course Prerequisites

TAB 124:

Accessing Notes

LMS Web

All of the objects in the **Catalog**, **Lessons**, **Resources**, **Collaboration**, and **Setup** modules in the LMS support entering and view notes for records created for the object. To access the notes for an object record:

1. Find or create a record for the object.
2. Navigate to the details page for the object.
3. Click the **Notes** link in the left sidebar. The ***Notes*** page appears.
4. By default, no notes are displayed. To view existing notes for the object record, enter search criteria and click **Go**.
5. To enter new notes, click the **Add New** link in the page header.

TAB 125:

Schedule and Edit Course Iterations

Schedule Course Iterations

Scheduling course iterations includes choosing catalog items, under which the course iteration is being offered, the date it is available, whether it is available for users.

Course iterations can be added in the **Catalog** module. To schedule a course iteration in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click the **Course Iteration** tab and click the **Create** link in the left sidebar to display the page for creating a course iteration.
3. Enter the ***required*** information for creating the course iteration:

Required Information	Description
Product Group	Use the Finder icon to find and select a product group for the course iteration.
Part Number	Enter a part number for the course iteration. You must enter an alphanumeric string that uniquely identifies the course iteration. Part number can be used to search for and order the course iteration. Based on how your system administrator has configured the system, the prefix for the selected product group may be automatically added to the beginning of the part number. **Note** If the prefix appears, do ***not*** delete or change the prefix. The system requires product group prefixes to be included in all part numbers.
Name	Enter a name for the course iteration.
Available From	Use the Calendar to select the first day the course iteration will be available.

4. Enter any ***optional*** information for the course iteration:

Optional Information	Description

Description	Enter a description for the course iteration.
Security Domain	Use the Finder to find and select a security domain.
Discontinued From	Use the Calendar to select the last day the course iteration will be available.
Number Items	(Display only) This field displays the number of items in the course iteration and is blank until you define items for the course iteration.
Internal	Select this check box to designate the course iteration as orderable for employees.
External	Select this check box to designate the course iteration as orderable for clients (external learners).
Display for Web	Select this check box to display the course iteration in the Product Catalog for learners, managers, and group administrators, as well as web registrars.
Display for Call Center	Select this check box to display the course iteration in the Product Catalog for Call Center registrars.

5. If any additional fields have been defined by your system administrator, the fields are displayed in the ***Custom Fields*** area.

   Enter information in the fields as required/desired.

6. Click the **Course Iteration Items** link to define items for the course iteration.

   The ***Course Iteration Items*** page appears.

   Note You must define at least one item for a course iteration before you can save the course iteration. In addition, you must specify at least one catalog item as a choice for the course iteration item.

   To add a course iteration item and choices for the item:

   a. Click the **Add New** link.

      The ***Course Iteration Item Details*** page appears.

   b. Enter the following information for the course iteration item:

Optional Information	Description
Description	Enter a description for the course iteration item.

c. In the ***Choices*** area, click the **Add New** link to add a choice for the item.

   The ***Search for Learning Offerings*** pop-up window appears.

d. Enter a category and, optionally, a product group and click **GO** to return all catalog items that match your search criteria.

   Note that if you select `Lesson' as your category, the search only returns classes that have a start date within the effective dates (Available From and Discontinued From) for the course iteration.

e. Select one or more of the catalog items in the list by selecting the check boxes next to their titles, then click **Done** to close the pop-up window and add your selections to the course iteration item.

   You can enter as many choices for the course iteration item as you wish. When the course iteration is ordered, any one of the catalog items in the list of choices for the course iteration item can be selected.

7. If you are done adding course iteration items and choices, click **Save** (this link only appears when at least one course iteration item with one choice has been added to the course iteration)

   However, you should make sure that you do not want to add more items to the course iteration. Once you save (i.e. schedule) the course iteration, a price is calculated for the course iteration based on the number of items in the course iteration and the unit price for each item. This price is then added to the top-level internal and external price lists in the system.

   Important If you wish to add more items, do ***not*** click **Save**. Instead, click the **Back** button to return to the previous page where you can add another course iteration item.

Edit Course Iterations

After you have scheduled the course iteration, you may edit the specified attributed or add additional information. To edit:

13. Select **Catalog** in the **Go to:** drop-down list.
14. Click the **Course Iteration tab** and click the **Search** link in the left sidebar.
15. Enter the search criteria and press Go.
16. Find the desired course iteration and click the Edit icon.

17. You can edit the information on the main page using the drop-down list above the main page information.
18. You can edit additional information (e.g., attachments, prerequisites) using the left sidebar links. See the links below for more information about that.

To add or edit the lessons, products, or instructional units associated with this iteration, click the Course Iteration Lessons link in the upper right corner of the Main page. From that page, you have the ability to delete (click the Trash Can icon), edit (click the Edit icon), or add new items (click the Add New button).

After the system schedules the course iteration, links to the following pages are displayed:

Page	Note
Audit Trail	
Internationalization	Functionality Not Used in System Release.
Notes	
Keywords	
Cancellation Charges	Functionality Not Used in System Release.
Attachments	
Roster	Lists Learners in the iteration as well as links to their grades and output codes.

TAB 126:

Adding Keywords to a Course Iteration

Keywords can be used as criteria when searching the catalog for catalog items.

To add keywords to a course iteraton in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list.
2. Click **Package** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Click **Create** to display a form to define a new package. Click **Search** to find an existing package that you can edit.
4. Click the **Keywords** link to display the ***Keywords*** page.
5. Select a keyword from the drop-down list and click **Add** to list the keyword at the top of the page.

TAB 127:

Roster/Registration Administration Tasks

Course Managers perform registration tasks on the ***Roster*** and ***Registration*** pages, but not every task can be done on both pages.

The following table shows which lesson tasks can be done on each page, and provides references for procedural information.

Task	From Roster Page?	From Registration Page?
Cancel Registration	Yes	Yes
Record `No Shows'	Yes	No
Add Registration Notes	Yes	Yes
View Registration Details	Yes	Yes
Substitute Learner	Yes	Yes
Recording Attendance	Yes	No
Mark a Lesson Completed	Yes	No
Record Grades	Yes	No
View Online Test Results	Yes	No
Assign Resources to Learners	Yes	No

Most registration administration tasks can be performed through the lesson roster, which can be accessed in the **Lessons** module in the LMS.

TAB 128:

Creating Ad Hoc Learning Event

Certain users can record ad hoc learning for learning not defined in the LMS using the **New Ad Hoc Event** button. This may also be used to record informal learning.

Note This procedure creates a new course in the catalog, which is why some of the displayed fields prompt you for course-related information; however, by default, the course is not enabled for viewing/ordering in the catalog. Catalog administrators always can choose, if they wish, to enable the course.

In addition, the event appears in the learners' ***Transcript*** page as a completed lesson for the course created by the procedure.

To record ad hoc learning in the LMS for one or more learners, using a new ad hoc event, perform the following tasks:

1. Select Learners
2. Enter Information for the New Event
3. Enter Learner/Event Information

Select Learners

This task is identical to recording ad hoc learning using an existing learning resource.

Enter Information for the New Event

After selecting learners for the ad hoc event, enter the information required to create the event:

1. Click **New Ad Hoc Event**.

The ***Create New Ad Hoc Event*** page appears.

2. In this page, enter the following information:

Fields	Description
Title	Enter an appropriate title for the new event. For example, "Java Basics".
Course Number	Enter a number or string that uniquely identifies this event (i.e. course). For example, "JB001".
Available From	Select the date from which this ad hoc learning will be available in the field.
Language	Select the appropriate language for the event. For example, "English" if this event is in English.
Description	Enter an appropriate description.
Group	Select the appropriate catalog group to which this learning would belong. For example, "Programming/Development".
Duration	Enter the appropriate duration for this event.

3. Click **Next**.

The ***Ad Hoc Scoring*** page appears.

Enter Learner/Event Information

This task is identical to recording ad hoc learning using an existing learning resource.

TAB 129:

Recording Ad Hoc Learning Using Existing Learning Resources

To record ad hoc learning for one or more learners in the LMS, using an existing learning resource (i.e. catalog item), perform the following tasks:

1. Select Learners for Ad Hoc Learning
2. Select Existing Learning Resource for Ad Hoc Learning
3. Enter Learner Completion and Event Information

Select Learners for Ad Hoc Learning

To record ad hoc learning, you must first select the learners for whom you will record the learning:

1. From the **Go to:** drop-down list, select **Registrar (Internal)**.
2. Click the **Ad Hoc Learning** tab.

The ***Ad Hoc Learning*** page appears.

3. Select the learner(s) for whom you want to record ad hoc learning:
   a. Click the "**Click here" to view Learners** link to select learners.
      - If you're using the **Registrar (Internal)** module, the ***Learner*** page appears with the **Name** and **Unit** fields. For example, you can type in the first letters of the business unit name to narrow your search for internal learners.
   b. Select the appropriate learners for whom you want to record ad hoc learning.

Select Existing Learning Resource for Ad Hoc Learning

After selecting learners, you must then select the learning resource for which you want to record ad hoc learning:

1. Click **Select Learning Resources**. The ***Ad Hoc Learning*** page appears.
2. Search the catalog for an item for which you want to record ad hoc learning.
3. Select the appropriate catalog item from the displayed results by clicking the **+** sign beside it.

The ***Ad Hoc Scoring*** page appears.

Enter Learner Completion and Event Information

To complete the task of recording ad hoc learning for a set of specified learners, you should enter completion information, such as mastery, grades, and scores, for each learner. You may also want to enter information, such as location, time, and duration, about the `event' at which the learning occurred.

To enter learner completion and event information, use the fields in the ***Ad Hoc Scoring*** page:

Fields	Description
Location	Enter the location where the ad hoc learning took place. You can enter any value in this field. For example, "San Francisco". **Note** This is a free text field and is not related to the location object, which catalog administrators used to define locations for lesson-delivery and shipping.
Start Date **End Date**	Select the start date and end date for the ad hoc learning event.

Start Time **End Time**	Select the start time and end time for the ad hoc learning event.
Acquired On	Enter the relevant acquired date.
Choose Event Leader from your Group	Select an appropriate event leader for this course. An event leader can be anyone (for example, a manager) who can verify that the learners have adequate knowledge of the subject for which you intend to record ad hoc learning.
Score **Grade**	Optionally specify a score and grade for each individual learner.
Success	Select the check box for each learner to indicate that the learner has completed the ad hoc learning successfully. **Note** If you do not mark a learner as successfully completing the ad hoc learning event, any skills or courses associated with the event are not granted to the learner.

Click **Save** to record ad hoc learning for this catalog item for the selected learners.

Now, the learners for whom the ad hoc learning was recorded can access the LMS and view the item from their ***Transcript*** page in ***My Development*** tab.

TAB 130:

Browsing the Content Repository

When you enter Saba Content, you first see the folder hierarchy. The folder hierarchy is a browseable tree structure consisting of folders and content objects.

From the folder hierarchy, you can perform the following actions:

Action	Procedure
Drill down into a folder	Double-click the folder icon.
Open a content object	Click the content object name.
Open a folder for editing	Click the folder name.
Add a new content object	Drill down into a folder, and click the **Add new item** link.
Create a new folder	Click the **Add new folder** link.
Delete a content object	Drag the content object to the trash can icon.
Delete a folder	Drag the folder to the trash can icon. **Note** Folders must be empty before they can be deleted.

You can browse the folder hierarchy by drilling down into folders until you find the content object you want to open.

To return to the folder hierarchy view at any time from elsewhere in Saba Content, click the **Search** link on the left-hand sidebar.

TAB 131:

Searching the Content Repository

In addition to browsing the Saba Content repository, you can also find content objects by performing qualified and unqualified searches.

Performing a Search

To perform a search, click the **Search** link on the left-hand sidebar.

- For a qualified search, enter the search criteria in the search fields located on the left-hand sidebar and click the **GO** button. The search fields include:

Search Field	Description
Name	Name of the content object. Enter the initial characters of the content object name. The search will find all content objects that "start with" the string you enter.
Content Format	Content format of the content object. Select a content format from list of system-supported content formats.
Vendor	Vendor associated with content object Enter the initial characters of a vendor name. The search will find all content objects whose vendor name "start with" the string you enter.
Language	Language associated with the content object. Select a language format from list of system-supported languages.
Date Modified	Date on which the content object was last modified. Use the calendar picker to select a date.
Created By	Username of the creator of the content object. Enter the initial characters of a username. The search will find all content objects whose "created by" attribute "start with" the string you enter.
Created On	Creation date of the content object. Use the calendar picker to select a date.

- For an unqualified search (return all content objects stored in the repository), leave all search fields empty and click the **GO** button on the left-hand sidebar.

Viewing Search Results

When you perform a search, you see the results in the ***Search Results*** page. If there are numerous matches, the search results may span multiple pages.

By default, the ***Search Results*** page lists all items ordered alphabetically by name.

You can perform the following actions from the Search Results page:

Action	Procedure
Move to the next page of results	Click the **next>>** link at the bottom of the page.
Move to the previous page of results	Click the **<<previous** link at the bottom of the page.
Open a content object	Click the **edit** icon (at the far left of the table) for the content object you want to open.
Delete a content object	Click the **trash can** icon (at the far right of the table) for the content object you want to delete.
Reorder search results	Click any column header in the search results table to reorder the search results by the selected category (either alphabetically or ascending/descending).
Return to folder hierarchy view	Click the **Toggle to Tree View** link in the page header to return to the folder hierarchy view.

TAB 132:

Deleting Content Objects

There are two ways to delete content objects from the repository:

1. You can delete them from the folder hierarchy view by dragging a content object to the trash can icon.
2. You can delete them from the ***Search Results*** page by clicking the trash can icon for the content object you want to delete.

Note You cannot delete content objects once they've been published to the Learning Catalog.

TAB 133:

Import By Content Format

To import existing external content into the LMS Content repository, follow the steps below:

1. Using the folder tree, navigate to the folder into which you want to import the content, and click the **Add new item** link inside the folder.

or

To import the content at the top level of the repository, click the **Add Content** link on the left-hand sidebar.

2. Select the **By content format** radio button on the ***Add Content*** page.
3. Select the format of the content you want to import.

For a description of each of the content formats supported by LMS Content, see LMS online help under "Overview of Supported Content Formats".

4. Click **Next**.

The ***Content Objects Details*** page appears.

5. Use the fields on the left-hand side of the page to define metadata for the content object that will be created in the repository.

The table below lists and describes these fields:

Field	Description
Name	Enter a name for the content object you are creating. **Note** This is a required field.
Content Format	Displays the format in which the content was originally imported or created. This field is view-only.
Communications Protocol	Select the communications protocol that will be used for runtime communications between the content and the LMS. This field only applies to content formats that support the ability to communicate with the LMS. These formats include: ▪ SCORM ▪ AICC ▪ Partner content (NETg, SkillSoft, etc.) For all of these content formats ***except*** SCORM, the communications protocol is always **AICC**. For SCORM, you can select either **SCORM 1.0** or **SCORM 1.1**. For all other content formats, this field should be empty.
Player	Select the Player used to run the content when it is launched. The following content formats run in the Player delivery environment: ▪ SCORM ▪ IMS Content Package ▪ Learning Content Format ▪ Content Builder ▪ Questionnaire Builder

	The following content formats use a proprietary vendor-specific player: ▪ NETg ▪ SkillSoft ▪ SmartForce The following content formats run inside a standard browser window: ▪ AICC ▪ Directory ▪ Offline Content For content objects of type **File**, the player is the application with which the file extension is associated on the learner's machine.
Language	Use the picker to select the language in which the content you are importing is authored. You can select among the system-supported languages.
Source Object	Select a content object to which the current object is related. Typically, this field is used in conjunction with the Clone operation for tracking the source object from which the current object was cloned. However, you might also want to use this field to indicate other types of relationships between content objects, such as the hierarchical relationship of a master course and each of its child components.
Version	This field is used for tracking versioned content objects. It is only used in conjunction with the Clone operation (with versioning). The **Version** field is automatically defined and is not editable.
Security Domain	Use the picker to select a security domain for the content object. **Note** This is a required field.
Vendor	Use the picker to select the vendor from which the content you are importing was acquired. You can select among the vendors defined in the system.
Ready to Publish	Select this check box to indicate that the content is ready to be published to the Training Catalog. If the check box is unselected, you cannot publish. **Note** The check box is selected by default.
Vendor	TO BE DOCUMENTED!!!!
Content Type	Select a content type (course, assessment, document, image, etc.) that best describes the type or purpose of the content you are importing. The content type is informational only.
Available From/To	Enter the date range for which the content object is available to be published to the Learning Catalog. **Note** Currently, the system does not enforce this constraint. However, you can define business processes contingent on the information provided in these fields.

Target Folder	Use the picker to select the target folder to which you want to save the content object. By default, this field displays the target folder from which the import operation was invoked. If you invoke the import operation from the top level of the repository, the target folder is given as **Root**.
Description	Enter a text description of the content you are importing.
Resource Types	TO BE DOCUMENTED!!!!

6. Use the fields on the right-hand side of the ***Content Object Details*** page to select the content file(s) to import.

Each content format has its own requirements for the information that you must provide here. For details, see the topic describing the specific content format you are importing.

7. After selecting the content file(s), click **Save** to upload the content and create/save your content object.

8. After saving your content object, you see additional options displayed on the title bar (**Publish**, **Clone**, and **Export**).

Note You only see the **Publish** option if you have selected the **Ready to Publish** check box.

9. You also see additional options displayed on the right-hand navigation bar (**Skills**, **Objectives**, **Requirements**, and **Publishing History**).

10. Additionally, for some types of content objects, you see an **Edit with Content Builder** link and for some you see a **Preview** link.

TAB 134:

Using the Import Wizards

To simplify the import process for certain specialized types of external content, the LMS provides a set of import wizards. These import wizards include:

- Publisher wizard
- Dreamweaver wizard
- NETg wizard
- SkillSoft wizard

To use the import wizards, follow the steps below:

1. Using folder tree, navigate to the folder into which you want to import the content, and click the **Add new item** link inside the folder.

Or, to import the content at the top level of the repository, click the **Add Content** link on the left-hand sidebar.

2. Select the **By one-step wizard** radio button on the ***Add Content*** page.
3. Select the wizard you want to use, and click **Next**.

For additional information, see the topic describing the specific import wizard you are using.

TAB 135:

Creating Internal Content and Questionnaires

LMS Content supports the ability to create internal content and questionnaires using content assembly and authoring tools provided by the LMS. Each unit of content or questionnaire is stored directly in the database and can be updated and modified until it is ready to be published to items in the Training Catalog.

This chapter introduces the content-assembly tool, Content Builder, and the questionnaire authoring tool, Questionnaire Builder, and discusses how to create internal content and questionnaires.

Specifically, it covers the following topics:

- What is Content Builder?
- Creating Content
- What is Questionnaire Builder?
- Creating Questionnaires
- Exiting Content/Questionnaire Builder

TAB 136:

This TAB is not used.

TAB 137:

View Roster

What is a Roster?

A roster is a list of all the students who have registered for a lesson. The roster can be viewed from the ***Roster*** page, and several roster management tasks can be performed from here.

To view the roster for a lesson, follow these steps:

1. Choose Lessons from the drop-down list in the upper right corner of the LMS.
2. **Select Search on the Lesson tab and enter the appropriate search criteria and click Go.**
3. Click the Edit icon next to the desired lesson. This will display the Lesson Details page.
4. In the left sidebar, click the Roster link. This will display the roster.

To view the roster for a course iteration, follow these steps:

1. Choose Catalog from the drop-down list in the upper right corner of the LMS.
2. **Select Search on the Course Iteration tab and enter the appropriate search criteria and click Go.**
3. Click the Edit icon next to the desired course iteration. This will display the Course Iteration Details page.
4. In the left sidebar, click the Roster link. This will display the roster.

On the roster page there are a number of functions that may be performed.

TAB 138:

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TAB 139:

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TAB 140:

This TAB is not used.

TAB 141:

This TAB is not used.

TAB 142:

This TAB is not used.

TAB 143:

This TAB is not used.

TAB 144:

Change Waitlist Priority

When a registration is waitlisted, the system automatically assigns a priority of zero (0). You can assign a different value to any waitlisted registration to indicate that the registration has a higher or lower priority.

Priority information is for reference only. Lesson administrators can use priority when deciding which waitlisted registrations to confirm as seats become available in the lesson.

Note Priority values are arbitrary; the LMS does not place any restrictions on the priority values you use. You can use any range of values; however, the range should reflect your business practices (e.g. 0 is the highest priority and 99 is the lowest, or vice-versa).

To set a waitlist priority:

1. Follow this path to display the ***Lesson Roster*** page:
   Lessons ▶ **Lesson** tab ▶ **Go** ▶ **Edit** icon ▶ **Roster** sidebar link
2. Click the **Set Waitlist Priority** icon next to a listed item.
3. In the ***Set Waitlist Priority*** pop-up window, enter a priority value and a reason for the change.
4. Click the **Save** button. The new priority value will be listed in the **Waitlist Priority** column.

Note A waitlist priority also can be set in the ***Registrations*** page in the **Lessons** module.

TAB 145:

Substitute Learners

If a different learner than the person registered attends a lesson, the registration can be switched from the original person to the new person.

To substitute a registration:

1. Follow this path to display the ***Lesson Roster*** page:
Lessons ▶ **Lesson** tab ▶ **Go** ▶ **Edit** icon ▶ **Roster** sidebar link
2. Click the **Substitute Learner** icon next to a listed item.
3. In the ***Substitute Learner*** pop-up window, select a different learner from the organization that was billed for this order.
4. Click the **Save** button. A confirmation window will appear. Click **Close** to dismiss the window. The substituted learner's name will appear in the **Student Name** column.

Note Registrations also can be substituted in the ***Registrations*** page in the **Registrar** module.

TAB 146:

Assign Learners to Groups

The LMS allows managers of the course iterations to assign learners to groups within course iterations. The hierarchy is as follows: groups, sub-groups, and sections. Learners are assigned at the section level, and there can be multiple sections within a subgroup. Furthermore, sections can be assigned to specific lessons within the course iterations. Learners can register for course iterations, but do not necessarily have to register for each item in the iteration. This functionality gives the iteration manager the ability to group learners and manage the lessons (including start dates and locations) that they complete.

Creating Hierarchy

Follow this path to create the group hierarchy:

1. **Catalog** module - **Course Iteration** tab
2. Enter Search criteria to find the desired course iteration, and select "View Groups" link. This will display the course iteration groups, sub-groups, and sections already created. By default, the LMS creates a default groups, sub-group, and section where all learners are grouped until moved.
3. Click **Add/Modify Groups** to create a new group, sub-group, or sections. If you wish to add a sub-group or section to an existing group or subgroup, you also click this link. The LMS will allow you to select the appropriate radio button for adding a new group, subgroup, or section.
4. Once you have created a section, an icon will appear next to the section. Click this icon to add learners to that section.

Assigning Learners

After you have created sections, an icon will appear next to that section that will allow you to assign learners to that section. When you select the icon, the LMS will display a page listing all of the registered, unassigned learners in the left column and the learners assigned to the section in the right. Selecting the radio button next to the learners in either column will move them to the other. For example, if John Doe is a registered learner who is not assigned to the section you have chosen to detail, he will appear in the left column, title "Unassigned Learners." If you wish to assigned him to that section, simply select the radio button next to his name and the LMS will dynamically move him into that group.

Assigning Lessons to Sections

Before you can assign sections of learners to lessons, you must have already created groups, sub-groups, and sections. Follow this path to assign lessons within the course iteration to sections of learners:

1. **Catalog** module - **Course Iteration** tab
2. Enter Search criteria to find the desired course iteration, and select "View Lessons" link. This will display a list of lessons within the course iteration.
3. Click the Edit icon of the desired lesson. This will display detail about that lesson, including a link to add group sections titled "Register Group(s)". NOTE: the link to add group sections will only be displayed if the lesson start date has not passed and the lesson is an instructor-led lesson.
4. Select "Register Group(s)" to assign sections to the selected lesson. This will display the list of groups that you created when you created groups. From this page you can manage the learners in the groups by clicking the "people" icon (icon that looks like people) or register the section for the lesson.
5. Register the Section by clicking the "Register" icon. This registers all the learners of that section for the lesson.

TAB 147:

Resource Calendars (for Scheduled Resources)

Each facility, location, and equipment item (i.e. resource whose time can be scheduled/reserved) has a calendar that can be used to schedule the times it will be needed and locations where it will be deployed. The three types of calendars are:

- Facility Resource Calendar
- Equipment Resource Calendar
- Location Resource Calendar

Within the resource calendars, you can also schedule events. You would want to schedule an event if the resource was going to be unavailable for use or some other necessary allocation of the resource where it would be unavailable for regular scheduling. These are represented as events.

TAB 148:

This TAB is not used.

TAB 149:

Canceling Learners' Registrations

Canceling a registration removes the seat reservation in the lesson as well as the corresponding order line for the registration.

To cancel a registration:

1. Follow this path to display the ***Roster*** page:

Lessons ↖ **Lesson tab** ↖ **Go** ↖ **Edit** Icon ↖ **Roster** sidebar link

2. Click the **Cancel** action icon next to a listed item. A pop-up warning reminds you that this action cannot be reversed.
3. Click **OK** to continue. The cancelled registration is removed from the ***Roster*** page.

Note Registrations also can be cancelled for an entire course iteration.

TAB 150:

This TAB is not used.

TAB 151:

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TAB 152:

This TAB is not used.

TAB 153:

This TAB is not used.

TAB 154:

Record Attendance

A Course Manager or Class Manager can mark attendance for a learner in the ***Lessons*** module of the LMS. Attendance can also be marked by an instructor in the ***Instruction*** module.

To record attendance for a learner or a lesson in the LMS:

1. Follow this path to display the ***Lesson Attendance*** page:
Lessons ▶ Lesson ▶ Go ▶ Edit link ▶ **Roster** link ▶ **Lesson Attendance** link
2. For each session, select either the **Mark All** check box for the entire lesson or check boxes for individual learners.
3. Click **Save**.

TAB 155:

Mark a Lesson Completed

For all lessons, regardless of whether the lesson is classroom-based or online, the instructor for the lesson can mark the lesson completed in the ***Instruction*** module.

Lessons can be marked `Completed - Successfully' or `Completed - Unsuccessfully'. Completing a lesson successfully credits the learner with any certifications or competencies associated with the lesson. An unsuccessful completion can be later changed to `Successful', but once marked `Successful', a lesson can only be changed to `Unsuccessful' in by a system administrator.

Learners and their managers can view this information in the LMS.

To mark a lesson completed:

1. Follow this path to display the ***Grade Lesson:*** page:

Instruction ▶ My Lessons ▶ View (in **Roster** column) **▶ Grade Entire Lesson**

2. Select either the **Yes** or **No** radio button in the **Success?** column.
3. If desired, enter a value into the text box in the **Lesson Grade** column.
4. If present, click a **View Results** icon in the **Online Tests** column to view results. Click **Save**.

TAB 156:

Enter, Update Grades

For all lessons, regardless of whether the lesson is classroom-based or online, the instructor for the lesson can record a grade for a learner in the ***Instruction*** module of the LMS.

To enter a grader:

1. Follow this path to display the ***Grade Lesson*** page:
Instruction ▶ My Lessons ▶ View (in **Roster** column) **▶ Grade Entire Lesson**
2. Enter a value in the **Lesson Grade** field for the entire lesson or for any individual learner. If you enter a grade in the row for "Entire Class," you must click the down arrow next to the field to give it to all the learners.
3. Click **Save**.

Updating grades can be done up until the point that the lesson is Marked "Delivered".

If the lesson is associated with a course, the LMS will "roll-up" the grades from the individual lessons. From the Course Iterations tab in the Catalog module, the user can view the all the lessons and grades for individual learners, as well as a collection score for the course.

TAB 157:

Viewing Online Test Results

Instructors can view the results of online tests associated with a lesson by clicking a link in the **Online Tests** column on the ***Grade Lesson*** page. This can be useful when grading a learner. Results for the entire lesson can be viewed by clicking the **Grade by Question** link, or results for each learner can be viewed by clicking a **Grade by Learner** link.

To view online test results:

1. Follow this path to display the ***Grade Lesson*** page:
Instruction ▶ My Lessons ▶ View (in **Roster** column) **▶ Grade Entire Lesson**
2. Click a link in the **Online Test** column to display either the ***View by Test*** or ***View by Learner*** page.

TAB 158:

Crediting Unregistered Learners

An instructor can select learners for which they want to give credit for a lesson, although the learners have not registered for the lesson.

To credit an unregistered learner:

1. Follow this path to display the ***Lesson Roster*** page:
Instruction ▶ My Lessons ▶ View (in **Roster** column)
2. Click the **Credit Unregistered Learner** link.
3. Click the **Search for Learners** link to display a pop-up window.
4. Enter search criteria in the fields and click **Go** to list learners.
5. Select the check box next to one or more learner names and click the **Add** button at the bottom of the page.
A confirmation message appears to indicate the lesson credit was successfully recorded in the learner's transcript.

TAB 159:

Monitoring Discussion Threads

Monitoring discussion threads involves viewing the discussion threads and potentially removing Learners from the community.

View Discussion Threads

1. Select My Home from the Go-to: module list and select the Collaboration tab.
2. Select Personal Communities for those you created and monitor or Communities of Practice for additional communities you may monitor related to courses, MOSs, skills, or roles.
3. Click on the name of the community you with to view the discussion threads of and select Discussion Board in the row of Community Actions.
4. This will contain the topic list, from which you may click the titles to view the contents of each topic.

Remove Learners

1. Select My Home from the Go-to: module list and select the Collaboration tab.
2. Select Personal Communities for those you created and monitor or Communities of Practice for additional communities you may monitor related to courses, MOSs, skills, or roles.
3. Click on the name of the community and scroll down to Community Interested Learners.
4. Click the Trash Can icon next to the Learners you would like to remove from the community.

TAB 160:

Add Learner to Waitlist

As a method of making seats available in a lesson, you may choose to move confirmed registrations to the waitlist.

Once you move a confirmed registration to the waitlist, the seat reserved for the registration becomes available. In addition, seats become available in a lesson when registrations for the lesson are cancelled or the lesson scheduler adds seats to the lesson.

To move a registration to the waitlist:

1. Follow this path to display the ***Lesson Roster*** page:
Instruction ▶ My Lessons ▶ View (in **Roster** column)
2. Click the **Waitlist** icon next to a listed item.
3. In the ***Waitlist*** pop-up window, enter a reason for the change.
4. Click the **Save** button. The **Waitlist** icon is replaced by the **Confirm** and **Waitlist Priority** icons in the **Action** column.

TAB 161:

This TAB is not used.

TAB 162:

Assigning Class Managers and Subject Matter Experts to a Lesson

To assign a CM or SME to a lesson in the LMS:

1. Select **Lessons** in the **Go to:** drop-down list
2. Click **Lesson** on the menu to display the **Search** and **Create** links in the left navigation bar.
3. Create or find a lesson.
4. Click **Resources** in the sidebar to display the ***Resources Manager*** page.
5. Select Employee as the resource type from the drop-down list to display Add a New Resource Type.
6. Enter required information:

Required Information	Description
Purpose	Select a purpose using the drop-down list.
Resource Subtype	Choose Class Manager or SME

7. Enter optional information:

Optional Information	Description
Name	Select a name using the picker tool.
Rate Template	Select a subtype using the drop-down list.
Resource Rate Type	Accept the default or select a rate type from the drop-down list.
Resource Rate	The rate defaults from the rate type.
Required Quantity	Accept the default or enter a new number.

TAB 163:

Assign Class Managers and Subject Matter Experts to Lesson Templates

Resources can be assigned at two levels: lesson template and lesson iteration.

To assign a resource type for a lesson template in the LMS:

1. Select **Catalog** in the **Go to:** drop-down list
2. Click **Lesson Template** on the menu.
3. Create a lesson template or find an existing lesson template that you can edit.
4. Click **Resources** in the sidebar to display the ***Resources*** page.
5. Select Employee as the resource type in the Add New Resource Type drop-down list.
6. Input the purpose and choose Class Manager or SME as the Resource Subtype.
7. Select a name using the Finder. The remaining fields will be populated by information linked to the specific resource selected.
8. Click **Save** to assign the resource.

This resource will be inherited by all the lessons based on this template.

TAB 164:

This TAB is not used.

TAB 165:

Enter Notes

Notes can be added to any lesson. One use of notes might be to document extenuating circumstances. These notes can be viewed by course managers, class managers, and instructors while the lesson is being taught, or after it has been delivered.

To add notes to a registration:

1. Follow this path to display the Lesson Roster page:
   Lessons ▶ Lesson tab ▶ Go ▶ Edit Icon ▶ **Roster** sidebar link
2. Click the **Registration Notes** icon next to a listed item.
3. In the ***Registration Notes*** page, either search for an existing note or create a new note by clicking the **Add New** link.
4. In the ***Add New*** page, select a category from the drop-down list and write the note in the text box.
5. Click **Save**.

Note Notes also can be added in the ***Registrations*** page in the Lessons module

TAB 166:

Enter and Update Grades

To record a grade for a learner in the LMS:

1. Follow this path to display the ***Lesson Roster*** page:

Lessons ▶ Lesson ▶ Go ▶ Edit icon **▶ Roster** link

2. Click the **Grade Entire Lesson** link to display the ***Grade Lesson*** page.
3. Enter a value in the **Lesson Grade** field for the entire lesson or for any individual learner. If you enter a grade in the row for "Entire Class," you must click the down arrow next to the field to give it to all the learners.
4. Click **Save**.

Updating grades can be done up until the point that the lesson is marked "Delivered".

If the lesson is associated with a course, the LMS will "roll-up" the grades from the individual lessons. From the Course Iterations tab in the Catalog module, the user can view the all the lessons and grades for individual learners, as well as a collection score for the course.

TAB 167

View Direct Reports' Registrations

Using the **Profiles** tab to display the Registrations page for a team member allows you to view the registrations listed, and to perform other actions such as marking products complete, deleting registrations, or viewing order details.

To view a team member's Registrations:

1. Select **My Team** from the drop-down list.
2. Click the **Profiles** tab to display the View Profiles page.
3. Select **Registrations** for a member from the **Profile Element** drop-down list and click **Go** to display the Registrations page.
4. You can view an item's details, the location details, and take actions by using the Action Icons. You can also click the **View Transcript** link to see the member's Transcript page.

See Also

TAB 168: “Mark a Products Complete”

TAB 168

Mark Products Complete

A learner's Learning Approver always has the ability to mark completion for products (only instructors and administrators mark completion for classes). Learning Approvers can mark items complete both from the learner's Registrations page and from the learner's Transcript page. Marking complete from the Transcript page enables the learner's Learning Approver to override the status and score provided for an item that was marked complete either automatically or by the learner himself. This provides a correction workflow and acts as a safeguard against mistakes.

If launchable/downloadable content was marked complete **without success** when it was moved from the Registrations page, the learner's Learning Approver can update the status to success, causing the LMS to credit the learner's profile with any competencies or certifications associated with the item. However, if the content was marked complete **with success** when it was moved, this cannot be undone through the LMS, even if the Learning Approver downgrades the learner's completions status and score.

Note Learning Approvers should remember that if they are marking completion for one or more products that complete a certification, the certification acquisition cannot be reversed through the LMS, and any competencies granted cannot be deleted.

When a registration is marked complete, it moves from the learner's Registrations page to the Transcript page. If the item is online "trackable" content that is marked complete automatically by the content, it will move to the Transcript page without any action from the learner, instructor, or Learning Approver.

To mark a team member's registrations complete:

1. Select **My Team** from the drop-down list.
2. Click the **Profiles** tab to display the View Profiles page.
3. Select **Registrations** for a member from the **Profile Element** drop-down list and click **Go** to display the Registrations page.
4. Click the **Mark Complete** action icon to display the Mark Completion page.
5. Select either **Yes** or **No** to indicate successful completion.
6. Enter a value for a score.
7. Select a completion date using the picker tool.
8. Click **Save**.

See Also

TAB 169, Ad Hoc Grants and Marking Items Complete

TAB 169

Ad Hoc Grants and Marking Items Complete

Granting items is a way to give credit to learners for an item. It is similar to marking products complete for a learner because in both cases, if the completion is marked "successful," the learners will acquire any skills or courses associated with the items.

The following list summarizes these actions.

1. Grant ad hoc credit for learning items

A manager can grant credit for these types of learning from the **Ad Hoc Learning** tab:

- Products and courses in the catalog (using the **Select Learning Resources** button)
- Learning acquired outside of the system (using the **New Ad Hoc Event** button)
- Informal learning (using the **New Ad Hoc Event** button)

For more information, see TAB 170, "Grant Ad Hoc Credit for Learning Items".

1. Mark registrations for products as "Complete"

Product registrations can be marked complete by a manager on a learner's Registrations page with either a "successful" or "unnecessarily" status. If marked "unnecessarily," the learner does not earn any skills associated with the product or acquire any courses. The product moves to the Transcript page, where registration can be changed to "successful" at a later time. Scores can also be updated on this page.

For more information, see TAB 168, Mark Products Complete.

1. Mark products in courses as "Complete"

A manager can mark products complete from within the **Courses** tab when the products are elements in a course path. To do this, a manager must click the course title and then find the products listed in the paths. A Mark Complete icon will appear next to the items.

The effect of this action depends on whether the learner has registered for the product when it is marked complete.

- If the learner has registered, marking complete has the same effect as described in action 2, above.
- If the learner has not registered, marking complete has the same effect as described in action 1, above (it is the same as an ad hoc grant).

1. Grant Courses

A manager can grant courses to learners using the **Courses** and **Ad Hoc** tabs in the **My Team** module. When courses are granted, learners do not gain credit for any learning items required for acquiring the courses. Therefore, the learners' profile will only show elements needed to acquire the courses as met if they were met outside of the course acquisition process. One consequence of this is that if a product that is required for a course is versioned, learners who were granted the course and who did not complete the product will not be required to complete the new product version to keep the course in **Acquired** status.

For more information, see TAB 171, "Grant Ad Hoc Courses".

TAB 170

Grant Ad Hoc Credit for Learning Items

Managers can assign existing learning events or create new learning events to assign to their team members. Learning items are catalog items that the team member has not formally enrolled in, but a manger can mark as completed and provide a score. When saved, they are listed in the learner's Transcript page.

A manager selects the learners for which they want to record participation in the event. The learners must belong to the manager's team.

If the manager is creating the event for learners, they can select an existing item, or can choose to create a new course in the system and create the event based on the course.

To grant an ad hoc learning event:

1. Select **My Team** in the **Go to:** drop-down list
2. Click the **Ad hoc Learning** tab display the Ad hoc Learning page.
3. Select one or more check boxes next to learner names.
4. Do one of the following:
   - Click the **Select Training Catalog** button.
   - Search for a resource and click the **Add** button to display the Ad Hoc Scoring page.
   - In the Ad hoc Scoring page, you can add additional details, score each user, and add skills. Click **Save** when finished.
   - Click the **New Ad hoc Event** button.
   - Enter data into the required fields and select a language from the drop-down list, and click the **Next** button to display the Ad hoc Scoring page.
   - In the Ad hoc Scoring page, you can add additional details, score each user, and add skills. Click **Save** when finished.

TAB 171

Grant Ad Hoc Courses

To grant an ad hoc course:

1. Select **My Team** in the **Go to:** drop-down list
2. Click the **Ad hoc Learning** tab display the Ad hoc Learning page.
3. Select one or more check boxes next to learner names.
4. Click the **Select Courses** button.
5. Search for a course and click the **Add** button to display the Ad Hoc Courses page.
6. Add **Acquired On** and **Expired On** dates and click **Save** when finished.

Note Managers cannot grant a course that has already been assigned to a learner and is `In Progress'.

Note Managers can view team members' courses, assign courses, or grant courses to members. These tasks can be performed on more than one page in the **My Team** module. The following table summarizes these tasks and locations.

Page	Grant course	Assign Course	View Course	For More Information, See:
Courses	No	No	Shows all courses for an individual.	See TAB 172, "View a Learner's Courses"
Team Courses	Yes	Yes	Shows the number of courses assigned to each member of a team, by status.	See TAB 172, "View a Learner's Courses"
Ad Hoc Learning	Yes	No	No	This section

TAB 172

View a Learner's Courses

The Courses page for a specific individual lists all courses in that learner's profile, the statuses for the courses, and the person or role that assigned each course. The Learning Approver can sort the learner's courses by selecting a status from the drop-down list and clicking **Go**.

To view team courses:

1. Select **My Team** from the drop-down list.
2. Click the **Profiles** tab to display the View Profiles page.
3. Select **Course** for a member from the **Profile Element** drop-down list and click **Go** to display the Courses page.

The following table describes the information displayed on the page.

Column Heading	Description
Course Name	Clicking the course name displays the Course Details page, which shows additional details such as a description, prerequisites, valid for period, etc. It also lists the learning items contained in the course, and whether they have been met. A Learning Approver can mark some items complete in this section, however doing so will bypass the normal registration process if the learner has not already registered.
Version	This indicates the course's version. An administrator can create a new version when significant changes are made, and more than one version may appear in this column.
Status	A course's status can be: **Planned** - prerequisites are not met **In Progress** - at least one course item has been met **Acquired** - all items have been met, or the course has been granted to the learner **Expired** - the course has reached its expiration date, or it has been forced to expire by the administrator
Assigned By	Courses can be assigned by a role, an administrator, a Learning Approver, or by the learner, in that order of precedence. If a course has already been assigned by an agent higher in the order, a Learning Approver or learner cannot assign it. However, if a higher agent removes the assignment, then it can be reassigned by a Learning Approver or learner. **Note** For more information on assigning courses, see TAB 174, "Ad hoc Learning Tab" .

Target Date	Target dates serve as a reminder of when the course should be acquired.
Acquired On	This indicates when the last item was met or when the course was granted to the learner. Once a course is acquired, its record is never deleted from this page.
Expiration Date	The expiration date can show when a course has expired in the past, or when it will expire in the future. If an administrator forces expiration, that date is listed in this column.
Need Re-certified	When a course is nearing its expiration period, the need for re-certified is indicated in this column by showing "Yes."
Community	Clicking this icon will display a page listing communities that can serve as resources in gaining the course.
History	Clicking the History icon displays the Course History page, which shows the acquisition history for the selected course. If there is no path indicated, it means the course was granted by an administrator or Learning Approver.
Delete	Clicking the Delete icon will remove the course from the page. Only courses that you have assigned that have a **Planned** or **In Progress** status can be deleted.

Note Learning Approvers can view team members' courses, assign courses, or grant courses to members. These tasks can be performed on more than one page in the **My Team** module. The following table summarizes these tasks and locations.

Page	Grant course	Assign Course	View Course	For More Information, See:
Courses	No	No	Shows all courses for an individual.	See TAB 173, "Courses Tab"
Team Courses	Yes	Yes	Shows the number of courses assigned to each member of a team, by status.	(This Section)
Ad Hoc Learning	Yes	No	No	See TAB 170, "Grant Ad Hoc Credit for Learning Items"

TAB 173

Courses Tab

- Clicking this tab displays the Courses page, where a manager can assign a course to a team member's profile in **Planned** or **In Progress** status, or grant the learner a course complete in **Acquired** status through the following actions:
  - Assigning Courses Through the Courses Page
  - Granting Courses Through the Courses Page

TAB 174

Ad hoc Learning Tab

Clicking this tab displays the Ad Hoc Learning page, which allows Learning Approvers to grant learning items or courses to their team members with a status of **Completed** or **Acquired,** respectively. Learning Approvers can also create new ad hoc learning events and assign them to team members.

TAB 175

Assigning Courses through the Courses Page

To add (assign) a course to a learner's profile with a **Planned** or **In Progress** status:

1. Select **My Team** from the drop-down list.
2. Select the **Courses** tab to display the Team Courses page.
3. Select one or more check boxes next to a member's name and click **Add Course** to display the Add Course Initiative page.
4. Enter search criteria in the sidebar fields and click **Go** to display a list of courses.
5. Click the "+" sign next to a listed course to assign it to the learner's profile.

TAB 176

Granting Courses Through the Courses Page

Managers can only grant courses completions that are not already assigned. Once the **Acquired On** date and **Expiration Date** are entered and the grant is made, you cannot change the dates.

To add (grant) a course to a learner's profile with an **Acquired** status:

1. Select **My Team** from the drop-down list.
2. Select the **Courses** tab to display the Team Courses page.
3. Select one or more check boxes next to a member's name and click **Grant Ad Hoc Course** to display the Ad Hoc Learning: Courses page.
4. Enter search criteria in the sidebar fields and click **Go** to display a list of courses.
5. Click the "+" sign next to a listed course to display the Ad Hoc Course page.
6. Assign an **Acquired On** date by either accepting the default date, clearing the field and leaving it blank, or entering a date in the past.
7. Assign an **Expiration Date** by either accepting the default date, clearing the field and leaving it blank, or entering a date on or after the **Acquired On** date. The default expiration period is the acquired on date plus the valid for date. If no expiration date is entered, the course will not expire.
8. Click **Save** to assign it to the learner's profile.

Note Managers can view team members' courses, assign courses, or grant courses to members. These tasks can be performed on more than one page in the **My Team** module. The following table summarizes these tasks and locations.

Page	Grant course	Assign Course	View Course	For More Information, See:
Courses	No	No	Shows all courses for an individual.	(This Section)
Team Courses	Yes	Yes	Shows the number of courses assigned to each member of a team, by status.	TAB 172, "View a Learner's Courses"
Ad Hoc Learning	Yes	No	No	TAB 170, "Grant Ad Hoc Credit for Learning Items"

TAB 177

View Team Member's Transcript

Transcript pages list all the catalog items that have been completed and ad hoc learning that has been assigned.

To view team members' transcripts:

1. Select **My Team** from the drop-down list.
2. Click the **Profiles** tab to display the View Profiles page.
3. Select **Transcript** for a member from the **Profile Element** drop-down list and click **Go** to display the Transcript page.
4. You can view an item's details, the update details, and take actions by using the Action icons. You can also click the **View Enrollments** link to see the member's Registrations page.

TAB 178

View and Add Team Member's Skills

To view team members' skills:

1. Select **My Team** from the drop-down list.
2. Click the **Profiles** tab to display the View Profiles page.
3. Select **Skills** for a member from the **Profile Element** drop-down list and click **Go** to display the Skills page.
4. You can view skill details by clicking the item's name.
5. To assess a skill, select the radio button next to the skill and click **Assess** to display the Skill Assessment page. Select a proficiency level, add desired comments, and click **Save**.
6. View a skill history by clicking **View History** to display the History for Skill page.
7. Add a new skill by clicking **Add Skill** to display the Add New Skills pop-up window.

TAB 179

View Team Member's Skills Gap

The skill gap page shows the difference between the proficiency a learner has and what is needed for a job role. Clicking the community icons will help provide information on closing the gaps.

To view team members' skills gaps:

1. Select **My Team** from the drop-down list.
2. Click the **Profiles** tab to display the View Profiles page.
3. Select **Skill Gap** for a member from the **Profile Element** drop-down list and click **Go** to display the Skill Gap Analysis page.
4. Sort the list of skills by selecting a job type from the drop-down list. You can view a skill's details by clicking on its name, and you can view suggestions for closing the gap by clicking the **View All** link.

TAB 180

View and Edit Team Member's Development Plan

To view team members' development plans:

1. Select **My Team** from the drop-down list.
2. Click the **Profiles** tab to display the View Profiles page.
3. Select **Development Plan** for a member from the **Profile Element** drop-down list and click **Go** to display the Development Plan page.
4. You can view an item's details by clicking the **Edit** icon next to the item. This will allow you to enter or change the purpose, or target and completion dates. Click **Save** to return to the previous page.
5. Click **Add** in the **Learning Activities** section to add a new catalog item to the member's plan. This will allow you to search for an item to be added.
6. Click **Add** in the **Assigned Tasks** section to add a new task to the member's plan. Clicking this button will allow you to enter a text description of the task, a purpose, and a target date. Click **Add** again on the secondary page to add the task.

Note You can delete any item from a development plan by clicking the delete icon next to an item.

TAB 181

View Team Member's Individual Training Plan

The individual training plan shows all the courses that are required by a specified role and have not yet been completed by the learner. Learning Approvers can use this tool to determine whether their team members are completing the courses required for their assigned roles. They can also use this tool to determine whether their team members are qualified for other roles, based on their completed courses.

Note Courses assigned by a learner's Learning Approver or by the learner only appear on the learner's Courses page, accessed by the Learning Approver through the **Profiles** tab and the **View Courses** option on the drop-down list.

To view team Individual Training Plans:

1. Select **My Team** from the drop-down list.
2. Click the **Profiles** tab to display the View Profiles page.
3. Select **Individual Training Plan** for a member from the **Profile Element** drop-down list, and click **Go** to display the Individual Training Plan Analysis page.
4. Sort the list of courses by selecting a job type from the drop-down list. Any Individual Training Plans for a job type will be listed. You can click on a community icon to find information on closing the gap.

TAB 182

View Team Member's Job Profile

To view team member's job profiles:

1. Select **My Team** from the drop-down list.
2. Click the **Profiles** tab to display the View Profiles page.
3. Select **Job Profile** for a member from the **Profile Element** drop-down list and click **Go** to display the Job Profile page.
4. You can view a role's details, including competencies and certifications. You can click on a community icon to find information on a role.

TAB 183

Mark a Lesson Delivered

For all lessons, regardless of whether the lesson is classroom-based or online, the instructor for the lesson (or any person with the appropriate privileges) can mark the lesson delivered in the ***Instruction*** module. The act of marking a lesson delivered moves it from a learner's ***Registrations*** page to ***Transcript*** page. If an instructor marks a lesson completed - unsuccessful, and then marks it delivered, the completion status can only be changed by a system administrator.

Note Before the system can add the lesson to the list of completed products in a learner's profile, in addition to the lesson being marked delivered, the lesson must be marked Completed for the learner. For more information, see TAB 184, "Mark a Lesson Completed".

To mark a lesson delivered in the LMS:

1. Follow this path to display the ***Lesson Roster*** page:

Instruction ▶ My Lessons ▶ View (in **Roster** column)

Note A lesson also can be marked delivered from the ***Grade Lesson*** and ***Lesson Attendance*** pages.

2. Select **Deliver** from the **Lesson Actions** drop-down list to display the ***Confirmation*** page.
3. Select a date using the picker tool and enter a reason in the text box.
4. Click the **Deliver Lesson** link at the bottom of the page.
5. Click **OK** on the delivery confirmation pop-up window.

TAB 184

Mark a Lesson Completed

For all lessons, regardless of whether the lesson is classroom-based or online, the instructor for the lesson can mark the lesson completed in the ***Instruction*** module.

Lessons can be marked `Completed - Successfully' or `Completed - Unsuccessfully'. Completing a lesson successfully credits the learner with any certifications or competencies associated with the lesson. An unsuccessful completion can be later changed to `Successful', but once marked `Successful', a lesson can only be changed to `Unsuccessful' in by a system administrator.

Learners and their managers can view this information in the LMS.

To mark a lesson completed:

1. Follow this path to display the ***Grade Lesson:*** page:
   Instruction ▶ My Lessons ▶ View (in **Roster** column) **▶ Grade Entire Lesson**
2. Select either the **Yes** or **No** radio button in the **Success?** column.
3. If desired, enter a value into the text box in the **Lesson Grade** column.
4. If present, click a **View Results** icon in the **Online Tests** column to view results. For more information, see TAB 157, "Viewing Online Test Results".
5. Click **Save**.

Note For more information on completion marking, see TAB 17, "Marking a Lesson Complete"

See Also

TAB 183, Marking a Lesson Delivered

TAB 185

Delivering Learning

The type of item requested by a learner determines how it is delivered.

See Tab 186, Marking a Lesson Delivered

Product Delivery

For products, the type of item determines the delivery method:

- For launchable/downloadable products, the concept of delivery is not really utilized. In effect, the item is considered delivered when the link/icon for launching the content is made available upon confirmation of the order.
- For shippable products, the item is delivered when the shipping administrator marks the item (in the shipment) delivered. If the item is in any other status, such as back ordered, the learner cannot access any associated online content, and no one can mark the product complete.

In addition, delivery of learning can take place on an ad hoc basis, in which the delivered learning was not scheduled or requested in the LMS.

For more information, see TAB 15, "Recording Ad Hoc Learning".

TAB 186

Marking a Lesson Delivered

A lesson is considered delivered when the instructor has taught the instructional materials/content for the lesson to the registered learners for the lesson:

- For classroom-based lessons (including broadcast lesson sections), the instructor delivers the content to learners in a classroom (either at the instructor's location or at a remote/broadcast location).

After the instructor delivers the lesson, the lesson administrator (instructor, class manager, or course manager) marks the lesson delivered. Marking a lesson delivered:

- Changes its status (and all corresponding order lines) from **Open** to **Delivered**.
- Moves the lesson from the enrollments page to the transcript page for all registered learners.
- Removes the lesson from the Training Catalog to prevent future requests for the lesson.
- As a result of the order line for the item having a status of **Delivered**, if the appropriate business rule is enabled, the order line can now be invoiced.
-

To Mark a Lesson delivered, follow these steps:

1. Choose Lessons from the drop-down in the top right corner
2. Enter search criteria to find the course you want to mark delivered and click go
3. Edit the Course in the Main frame
4. In the Left Navigation Pane click Roster
5. On the roster page, Select deliver from the lesson action drop-down.

TAB 187

Scheduling and Managing Lessons

This discusses building the Training Catalog, focusing on scheduling and managing lessons for courses.

Overview

A discussion of lessons in the LMS can be divided into two task areas:

- Lesson Creation
- Lesson Management

Lesson Creation

Lesson creation involves the following activities:

- Defining session templates for setting start dates and sessions for lessons.
- Scheduling lessons for courses.
- Scheduling lessons in response to lesson requests.

Lesson Management

Management of lessons involves the following activities:

- Assigning resources to lessons.
- Canceling lessons.
- Performing after-lesson tasks, including:
  - Marking lessons as delivered.
  - Recording student grades and attendance.
  - Archiving lessons.

Business Rules for Lessons

The following business rules affect the scheduling and maintenance of lessons:

Rule	Description
Allow Admin to override dedicated lesson request	Allow users with appropriate privileges to change the start date, session template, and location information for a dedicated lesson request in the actual dedicated lesson. If this business rule is disabled, start date, session template, and location information can only be changed from the order in which the request originated.
Resources	Automatically calculate resource-related expenses when the lesson is marked as delivered.

Session template	The session template for a lesson must have a duration that is greater than or equal to the number of hours specified for the course.

Business rules are set in ***System Designer*** (LMS Client Module) by your system administrator. For more information, see the LMS *System Administrator Guide*.

Session Templates

A session template defines a set of sessions that can be used to create lessons. When a session template is assigned to a lesson, the template determines the number of sessions for the lesson, the days of the week on which the lesson is offered, the start time of the lesson, and the total length (in hours) of the lesson.

Each session template consists of one or more sessions, grouped by weeks. Each session consists of a day of the week and a start and end time. To accommodate breaks and meal times, a day can be divided into multiple sessions. The total hours for a session template are calculated automatically by the LMS using the number of sessions in the template and the length of each session.

The LMS supports two types of session templates, weekly and ad-hoc. Use weekly session templates for lessons that are held on the same days of the week for one or more weeks. Use ad-hoc session templates for lessons that are held on different days of the week for one or more weeks.

When creating lessons, the LMS lists only appropriate session templates based on the duration and starting day of the week of the lesson.

The name of a session template doesn't change per time zone, although its hours change. For a virtual lesson named `T-Th 9-6', occurs between 9 AM and 6 PM on the east coast of the U.S., but a learner on the west coast would attend the lesson between 6 AM and 3 PM.

Note Session templates are required to schedule lessons. You can create or modify session templates when adding lessons.

Lesson Statuses

A scheduled lesson can have one of the following statuses:

Status	Description	Valid Actions
Open - Normal	The lesson is open and available.	▪ Change lesson information ▪ Users can add the lesson to orders ▪ Add or delete students from the lesson roster ▪ Cancel the lesson ▪ Mark the lesson delivered
Delivered - Normal	The lesson has been delivered.	▪ Add and edit attendance and grade information
Cancelled - Normal	A lesson has been cancelled. A lesson can have this status only if the lesson is cancelled when the previous status was **Open - Normal**, or if the lesson is marked **Delivered - Normal** and there are no registrations for the lesson.	▪ Archive the lesson

Archived - Normal	A delivered lesson has been archived.	▪ None
Archived - Cancelled	A cancelled lesson has been archived.	▪ None

User Lesson Status Codes

The LMS lets you define customized lesson statuses to help you track the status of your lessons throughout the lesson life cycle. Each of these user-defined lesson statuses is associated with a system-defined lesson status, thus maintaining the built-in logic of the system codes.

By assigning User Lesson Status codes to a lesson, you can track more detailed information about the status of a lesson.

Predefined User Lesson Status Codes

The LMS is distributed with the following predefined User Lesson Status Codes:

Predefined User Lesson Status Codes	Lesson Status
Available	Open-Normal
Pending Cancellation	Open-Normal
Archived Normal	Archived-Normal
Archived Canceled	Archived-Canceled
Canceled Normal	Canceled-Normal
Delivered	Delivered

Note User Lesson Status Codes are available for the Lesson object only. They cannot be used with Dedicated Lessons or Meetings.

Assigning User Class Status Codes

When viewing the details for a class, you can select a User Class Status for the class. Only those User Class Statuses associated with the current system Class Status Code are available for selection.

Overview of Lessons

Once you have defined courses, you are ready to schedule lessons. A lesson is an instance of a course and is created by specifying a location, start date and time, and duration (i.e. session template).

The LMS provides the flexibility of customizing lesson settings during the scheduling process without affecting the lesson template.

Lessons can be delivered using the following methods:

- Classroom-based Lessons
- Blended Learning
- Creating and Managing Lessons

Creating and Managing Lessons

The tasks associated with creating and managing lessons include:

- Creating Scheduled Lessons
- View Lesson Detail (Edit Information
- See TAB 53,Adding Scheduled Lessons in Batch Mode
- See TAB 54, Cloning a Lesson
- Creating and Managing Non-Training Events
- Assigning Resources
- Canceling Scheduled Lessons
- Handling Lesson Requests

For more information about creating courses and other aspects of building the Training Catalog, see TAB 97, "Building the Training Catalog".

TAB 188:

Overview of Supported Content Formats

LMS Content supports the ability to capture, manage, and deliver content provided in all of the following content formats:

Content Format	Description
AICC	Content designed in compliance with the AICC CMI-001 specification. The content can be imported either as a URL or using the four AICC course structure files specified for Level I compliance. Once imported, AICC-compliant content can be published to the Training Catalog for access by learners, or it can be exported.
Deployed SCORM	Content described using the SCORM Version 1.1 (Content Structure Format) or the Version 1.2 (Aggregation Model) specification. Deployed SCORM content can be imported as a URL pointing to a CSF file or IMS Manifest file. The file is a manifest for a content package, but does not itself contain the actual content resources. The content resources must already have been deployed on to a LMS Content Server machine. Once imported, the Deployed SCORM content can be edited using Content Builder, published to the Training Catalog for access by learners, or exported.
SCORM Content Package	Content packages that are compliant with the SCORM Aggregation Model Version 1.2 specification. The content package must be imported as a ZIP file. LMS Content unpacks the file, reads the XML manifest, and deploys the content to a registered content server. Once imported, the content can be edited using Content Builder, published to the Training Catalog for access by learners, or exported.
IMS Content Package	Content packages that are compliant with the IMS Content Packaging Version 1.1.1 specification. The content package must be imported as a ZIP file. LMS Content unpacks the file, reads the XML manifest, and deploys the content to a content server. Once imported, the content can be edited using Content Builder, published to the Training Catalog for access by learners, or they can be exported.
Learning Content Format	Content described using LMS' Learning Content Format (LCF), which is part of LMS' Universal Learning Format Version 1.0 specification. LCF content can be imported as a single XML-based LCF file or as a URL pointing to an LCF file. The LCF file is a manifest for a content package, but does not itself contain content resources. Once imported, the content can be edited using Content Builder, published to the Training Catalog for access by learners, or exported.
File	Any raw media file (such as a Word or PowerPoint document, a video clip, or an image). Once imported, files can be published to the Training Catalog for access by learners, used as building blocks for content assembly, or exported.
Directory	Any group of files (such as an HTML site, content source files, or project files) can be packaged into a ZIP file and stored in the repository. These files are unpacked onto a content server during import. Once imported, the files can be published to the Training Catalog for access by learners, or they can be exported.

URL	Any URL pointing to a content resource can be imported into the repository. Once imported, URLs can be published to the Training Catalog for access by learners or used as building blocks for content assembly.
Offline Content	Content packages designed for offline delivery can be authored using Publisher and imported into the repository. Offline content can be published to the Training Catalog for access by learners. The LMS tracks the results of offline content using the AICC communications protocol.
NETg	Content provided by NETg. Typically, NETg content is imported as a URL. Once imported, NETg content can be published to the Training Catalog for access by learners. When a learner launches NETg content, Saba tracks the learner's progress and stores the results of any tests taken by the learner as part of the content.
SkillSoft	Content provided by SkillSoft. Typically, SkillSoft content is imported as a URL. Once imported, SkillSoft content can be published to the Training Catalog for access by learners. When a learner launches SkillSoft content, Saba tracks the learner's progress and stores the results of any tests taken by the learner as part of the content.

TAB 189:

Creating New Content

In addition to importing external content into the LMS Content repository, you can also create new content using Content Builder. Content created using Content Builder can be edited, reused in part or whole by other content objects, published to the Training Catalog for access by learners, and exported.

To create new content from within the Saba Content repository, follow the steps below:

1. Select the **Using Content Builder** radio button on the ***Add Content*** page.
2. Click **Next**.

   The ***Content Objects Details*** page appears.
3. Enter required and optional information in the fields on the page.

   In particular, for Content Builder content, you need to provide the following information:

Field	Description	Required?
Name	Enter a name for the content object you are creating.	Yes
Communications Protocol	Select the communications protocol, if any, used by the content to communicate with Saba. By default, this field is empty. If appropriate, you can select either **SCORM 1.1** or **SCORM 1.0**.	
Security Domain	Use the Finder to select a security domain for the content object.	Yes

4. Click **Save** to create/save your content object.

   After saving your content object, the **Edit with Content Builder** link appears on the ***Content Object Details*** page.
5. Click the **Edit with Content Builder** link to launch the Content Builder environment and begin authoring your content.

See Also

See TAB 192, Using Content Builder

See TAB 193, Reusing Content Objects

See TAB 188, Overview of Supported Content Formats

TAB 190:

Defining Content Servers

To define content servers (local or remote), follow the steps below:

1. Click the **Content Server** tab.
2. Click the **Create** link on the left-hand sidebar.

The ***Content Server*** page appears.

3. In the **Name** field (required), enter a name for the content server.
4. In the **External URL** field (required), enter the URL that will be used by learners to access content resources stored on the content server.

For example, a local content server can point to the virtual directory used by the LMS:

http://<**machine_name**>/wSabaWeb

This URL ***must*** point to a virtual directory that is mapped to a working directory on the content server machine. However, if the working directory contains content in XML format with XSL style sheet declarations, the Content Preprocessor ***should*** be installed on the machine and the external URL ***should*** point to the server mapping for the preprocessor.

5. In the **Type** drop-down list (required), select the type of content server, **Local** or **Remote**.
6. For remote content servers, enter the following information (required):
   - FTP URL for the remote computer
   - Port Number on the remote computer
   - Username and Password for the FTP account on the remote computer
   - Directory path for the physical directory on the remote computer where the content resource files will be stored
7. For local content servers, enter the directory path for the physical directory on the local computer where the content resource files will be stored.

For example, to use the ***htdocs*** folder created by your LMS installation, you can specify the following path:

<**install_drive**:\>/SabaWeb/web/SabaWeb/htdocs

Note This is a required field for local content servers.

8. In the **Description** field, optionally enter a text description for the content server.
9. Click **Save** to save your content server definition.

TAB 191:

Import By Content Format

To import existing external content into the LMS Content repository, follow the steps below:

1. Using the folder tree, navigate to the folder into which you want to import the content, and click the **Add new item** link inside the folder.

   or

   To import the content at the top level of the repository, click the **Add Content** link on the left-hand sidebar.

2. Select the **By content format** radio button on the ***Add Content*** page.
3. Select the format of the content you want to import.
4. Click **Next**.

   The ***Content Objects Details*** page appears.

5. Use the fields on the left-hand side of the page to define metadata for the content object that will be created in the repository.

   The table below lists and describes these fields:

Field	Description
Name	Enter a name for the content object you are creating. **Note** This is a required field.
Content Format	Displays the format in which the content was originally imported or created. This field is view-only.
Communications Protocol	Select the communications protocol that will be used for runtime communications between the content and the LMS. This field only applies to content formats that support the ability to communicate with the LMS. These formats include: ▪ SCORM ▪ AICC ▪ Partner content (NETg, SkillSoft, etc.) For all of these content formats ***except*** SCORM, the communications protocol is always **AICC**. For SCORM, you can select either **SCORM 1.0** or **SCORM 1.1**. For all other content formats, this field should be empty.
Player	Select the Player used to run the content when it is launched. The following content formats run in the Player delivery environment: ▪ SCORM ▪ IMS Content Package ▪ Learning Content Format ▪ Content Builder ▪ Questionnaire Builder

	The following content formats use a proprietary vendor-specific player: ▪ NETg ▪ SkillSoft ▪ SmartForce The following content formats run inside a standard browser window: ▪ AICC ▪ Directory ▪ Offline Content For content objects of type **File**, the player is the application with which the file extension is associated on the learner's machine.
Language	Use the picker to select the language in which the content you are importing is authored. You can select among the system-supported languages.
Source Object	Select a content object to which the current object is related. Typically, this field is used in conjunction with the Clone operation for tracking the source object from which the current object was cloned. However, you might also want to use this field to indicate other types of relationships between content objects, such as the hierarchical relationship of a master course and each of its child components.
Version	This field is used for tracking versioned content objects. It is only used in conjunction with the Clone operation (with versioning). The **Version** field is automatically defined and is not editable.
Security Domain	Use the picker to select a security domain for the content object. **Note** This is a required field.
Vendor	Use the picker to select the vendor from which the content you are importing was acquired. You can select among the vendors defined in the system.
Ready to Publish	Select this check box to indicate that the content is ready to be published to the Training Catalog. If the check box is unselected, you cannot publish. **Note** The check box is selected by default.
Vendor	
Content Type	Select a content type (course, assessment, document, image, etc.) that best describes the type or purpose of the content you are importing. The content type is informational only.
Available From/To	Enter the date range for which the content object is available to be published to the Learning Catalog. **Note** Currently, the system does not enforce this constraint. However, you can define business processes contingent on the information provided in these fields.

Target Folder	Use the picker to select the target folder to which you want to save the content object. By default, this field displays the target folder from which the import operation was invoked. If you invoke the import operation from the top level of the repository, the target folder is given as **Root**.
Description	Enter a text description of the content you are importing.
Resource Types	

6. Use the fields on the right-hand side of the ***Content Object Details*** page to select the content file(s) to import.

Each content format has its own requirements for the information that you must provide here. For details, see the topic describing the specific content format you are importing.

7. After selecting the content file(s), click **Save** to upload the content and create/save your content object.

8. After saving your content object, you see additional options displayed on the title bar (**Publish**, **Clone**, and **Export**).

Note You only see the **Publish** option if you have selected the **Ready to Publish** check box.

9. You also see additional options displayed on the right-hand navigation bar (**Skills**, **Objectives**, **Requirements**, and **Publishing History**).

10. Additionally, for some types of content objects, you see an **Edit with Content Builder** link and for some you see a **Preview** link.

TAB 192:

Using Content Builder

Using Content Builder, you can create new content from scratch. You can also build content using all or parts of other content objects stored in the repository as building blocks.

Additionally, you can modify the contents of imported content packages, combine and recombine them to form new packages, or disassemble them into smaller packages or building blocks.

TAB 193:

Reusing Content Objects

Using Content Builder, you can reuse and combine content objects by selecting a content object from the repository and importing all or part of its contents into another content object.

The content object you choose to copy from must have content defined for it that can be understood by Content Builder. This includes content associated with any of the following types of content objects:

- Content Builder
- Deployed SCORM
- SCORM Content Package
- IMS Content Package
- Learning Content Format

There are many applications for this feature, including the ability to store banks of test questions in one or more content objects and then to selectively import questions from the question bank(s) into new content objects as needed.

TAB 194:

Content Preprocessor

If your content uses XML with XSL style sheet declarations, browsers that do not support transforming XML tags using XSL styles sheets cannot display the content properly.

To ensure your content is displayed properly, the LMS provides the Content Preprocessor, which must be installed on the same machine as the content.

For more information about the Content Preprocessor, as well as detailed instructions for installing and configuring the preprocessor, see the LMS *Content Server Install Guide*.

TAB 195

Product Discounts

Products must be added to marketing campaigns. For products assigned to marketing campaigns, the discount for the campaign is only applied to these products in a customer order. The discount is applied to individual products, and not to the total cost of the order.

Marketing campaign discounts are applied in addition to any other discounts applied to the order.

TAB 196

Defining Training Units

Training units are defined in ***Sales & Marketing Manager***. Each training unit has a price associated with it. In addition, training units can have an expiration date and a range.

Ranges are especially useful for setting training unit pricing according to number of units ordered. The number of training units ordered must fall within the range. If the number does not fall within the range, Saba does not let the customer order the training units.

Note Training units are not associated with any particular product. A training units defined in Saba can be used to order any products that accept training units.

LEARNING MANAGEMENT SYSTEM

Appendix D - Acronyms

Acronyms

A/C	Assistant Commandant
ACAT	Acquisition Category
ADL	Advanced Distributed Learning
AER	Academic Evaluation Report
AI	Assistant Instructor
AIT	Advanced Individual Training
AKO	Army Knowledge Online
AMDF	Army Master Data File
AOC	Area of concentration
AOT	Assignment-oriented Training
AR	Army Regulation
ARNG	Army National Guard
ASI	Additional Skill Identifier
ATHSA	Army Training Help Support Agency
ATIS	Army Training Information System
ATRRS	Army Training Requirements and Resources System
ATSC	Army Training Support Center
CAD	Course administrative data
CBI	Computer-based instruction
CBT	Computer-based training
CD-ROM	Compact disk – read-only memory
CM	Class manager
CoM	Course manager
CONOPS	Concept of Operations
CONUS	Continental United States
CoP	Community of practice
CrM	Classroom Manager
CTC	Combat Training Center
CVS	Content Validation Server
DA	Department of the Army
DCSOPS&T	Deputy Chief of Staff for Operations and Training
DCPDS	Defense Civilian Personnel Data System
DL	Distributed learning
DLS	Distributed Learning System
DLSST	Distributed Learning Student Support Team

Appendix D – Acronyms

DoD	Department of Defense
DOT	Director of Training
DOTD	Director of Training Development
DPTM	Director of Plans, Training, and Mobilization
DTF	Digital Training Facility
DTFM	Digital Training Facility Manager
DTTP	Distributive Training Technology Program
F	Facilitator
FCAPS	Fault, configuration, accounting, performance and security
FM	Facility Manager (Training)
FTP	File transfer protocol
FY	Fiscal year
G1	Deputy Chief of Staff for Personnel (General staff)
G3	Deputy Chief of Staff for Operations and Training (General staff)
GTA	Graphic training aid
HQDA	Headquarters, Department of the Army
I	Instructor
I&A	Identification and Authorization
IAW	In accordance with
ICW	Interactive courseware
ID	Identification
IETM	Interactive Electronic Training Manuals
IMI	Interactive media instruction
ISDN	Integrated Services Digital Network
IT	Information technology
ITP	Individual training plan
ITSD	Individual Training Support Division
JAG	Judge Advocate General
KCC	Knowledge Collaboration Center
L	Learner
LA	Learner Approver
LDAP	Lightweight directory access protocol
LLC	Life-long Learning Center

Appendix D – Acronyms

LLL	Life-long learning
LMS	Learning Management System
LO	Learning objective
MACOM	Major Army Command
MEDCOM	U.S. Army Medical Command
MOS	Military occupational specialty
MOS-Q	Military occupational specialty - Qualifying
MOUT	Military Operations on Urbanized Terrain
MRA	Multi-rater assessment
MTP	
N/A	Not applicable
NATO	North Atlantic Treaty Organization
NBC	Nuclear, Biological and Chemical
NCC	Net Control Center
NCO	Noncommissioned Officer
NCOA	Noncommissioned Officer Academy
NCOES	Noncommissioned Officer Education System
NG	National Guard
NGB	National Guard Bureau
NSTD	Non-system Training Devices
NTC	National Training Center
OCONUS	Outside the continental United States
OES	Officer Education System
OF	Objective Force
ORD	Operational Requirement Document
PC	Personal computer
PD	Product Distributor
PIF	Package Interchange File
PM	Program manager
PMO	Program management office
POI	Program of instruction
QA	Quality assurance
QM	Quota manager

Appendix D – Acronyms

RC	Reserve component
RDL	Reimer Training and Doctrine Digital Library
S3	Operations and Training Officer (Staff)
SA	System administrator
SAT	Systems Approach to Training
SCORM	Sharable Content Object Reference Model
Sched	Scheduler
SGI	Self-guided instruction
SIA	System Interface Agreement
SME	Subject matter expert
SOP	Standard Operating Procedures
SOW	Statement of Work
STD	System Training Device
STX	Situational Training Exercise
TADLP	The Army Distributed Learning Program
TADSS	Training aids, devices, simulators, and simulations
TASS	The Army School System
TD	Training Development
TD	Training Distributor
TDA	Table of Distribution and Allowances
TES	Tactical Engagement Simulation
TM	Technical Manual
TNET	Telecommunications Network
TOMA	Training Operations Management Activity
TPIO	TRADOC Program Integration Office(r)
TRADOC	U.S. Army Training and Doctrine Command
TSC	Training Support center
TSP	Training support package
UIC	Unit identification code
URL	Universal resource locator
USAR	US Army Reserve
USASOC	U.S. Army Special Operations Command
UTM	Unit training managers
VTT	Video Tele-training
WBT	Web-based training
WIN2K	Windows 2000
WOES	Warrant Officer Education System